NestHR

People. Attendance. Payroll. One place.

Web & Mobile App User Manual

A step-by-step guide for administrators, HR teams and employees on the website and the mobile app: from first setup to monthly payroll.

Version 1.0 | November 2026

Covers the NestHR website and the mobile app

Contents

GETTING STARTED
01 Welcome to NestHR 3
02 Getting Started 5

PEOPLE
03 Dashboard 8
04 Employees 10
05 Departments, Credentials & Documents 13

TIME & LEAVE
06 Attendance 16
07 Attendance Settings & Late Approvals 19
08 Leave 22
09 Holidays 24
10 Biometric Devices & Live Tracking 26

MONEY
11 Payroll 29
12 Loans & Advances 32
13 Expenses 34
14 Tax & Form 16, Promotions 35

WORK & GROWTH
15 Tasks & Announcements 37
16 Performance & Exit Management 39
17 Reports 41

ADMINISTRATION
18 Manage: Shifts, Salary Heads & More 43
19 Settings 45
20 Billing, Credits, Audit Log, Trash & Support 47

EMPLOYEE GUIDE
21 For Employees: Self-Service 49

MOBILE APP
22 The Mobile App: Getting Around 51
23 Employees & Attendance on Mobile 53
24 Leave, Late Approvals & Holidays on Mobile 57
25 Payroll, Loans & Tax on Mobile 60
26 Tasks, Documents & Alerts on Mobile 62
27 Settings & Administration on Mobile 64

APPENDICES
A First-Time Setup Checklist 67
B Monthly HR Calendar 68
C Troubleshooting & FAQ 69
D Glossary 70

GETTING STARTED

Welcome to NestHR

01

NestHR is your company's HR and payroll workspace: employees, attendance, leave, salary, loans, tasks and reports in one place. This manual shows you, step by step, how to do each job on the website. Part 2 shows the same jobs in the mobile app.

Who this manual is for

The web app shows different menus to different people. Find your role below, then read the chapters marked for you.

Role	Typical user	What you can do
Admin	Business owner / main administrator	Everything, including billing, settings and assigning roles.
HR Manager	Head of HR	Run people, attendance, leave, payroll, loans and most settings.
HR Executive	HR assistant	Manage employees, attendance and leave; view reports; handle exits.
Dept Head	Department / team lead	View employees, attendance, leave, holidays and performance for the team.
Employee	Every staff member	Self-service: own dashboard, payslips, leave, loans, documents, tasks and tax.

How to read this manual

You will see	It means
People › Employees	A menu path: click **People** in the left sidebar, then **Employees**.
Admin HR Manager	Which roles can open that page.
Tip	A shortcut or good habit.
Important	Something that can affect salary, attendance or data. Read before you click.

TIP

Setting up NestHR for the first time? Jump to **Appendix A: First-time setup checklist** at the end. It gives the right order so nothing needs redoing.

A map of the left sidebar

Everything starts from the sidebar. Groups and pages you see depend on your role.

OVERVIEW

- Dashboard / My Dashboard

PEOPLE

- Employees
- Departments
- Credentials
- Documents

TIME & LEAVE

- Attendance
- Leave
- Holidays
- Biometric
- Live Tracking

MY WORKSPACE

- My Payroll / My Report / My Loans
- Expenses
- Tax & Form 16
- Tasks
- Announcements

FINANCE & HR

- Payroll
- Promotions
- Attendance Settings
- Late Approvals
- Loans & Advances
- Exit Management
- Performance

SYSTEM

- Reports
- Manage
- Trash
- Billing
- Settings
- Audit Log
- Support

GETTING STARTED

Getting Started

02

Create your account, sign in safely, and learn the basic layout of the screen.

Create your company account

WHERE	WHO CAN USE IT	WHAT IT IS FOR
Register page	New companies	Opens your NestHR workspace

1. Open the NestHR website and choose **Register**.
2. Enter your **Full Name**, **Email** and a strong **Password**.
3. Submit. You are taken into your new workspace, where you finish the company details.
4. Open **Settings** and complete **General Info** (company name, address, GST/PAN) before adding employees.

Sign in

1. Open the login page and type your **Email** and **Password**.
2. If two-factor authentication is on, enter the 6-digit **Authenticator Code** from your phone app.
3. You land on the **Dashboard** (management) or **My Dashboard** (employees).

> **NOTE**
> The login page may also offer **Login with WhatsApp** or **Sign in with Passkey** as quicker ways to sign in, if your company has turned them on.

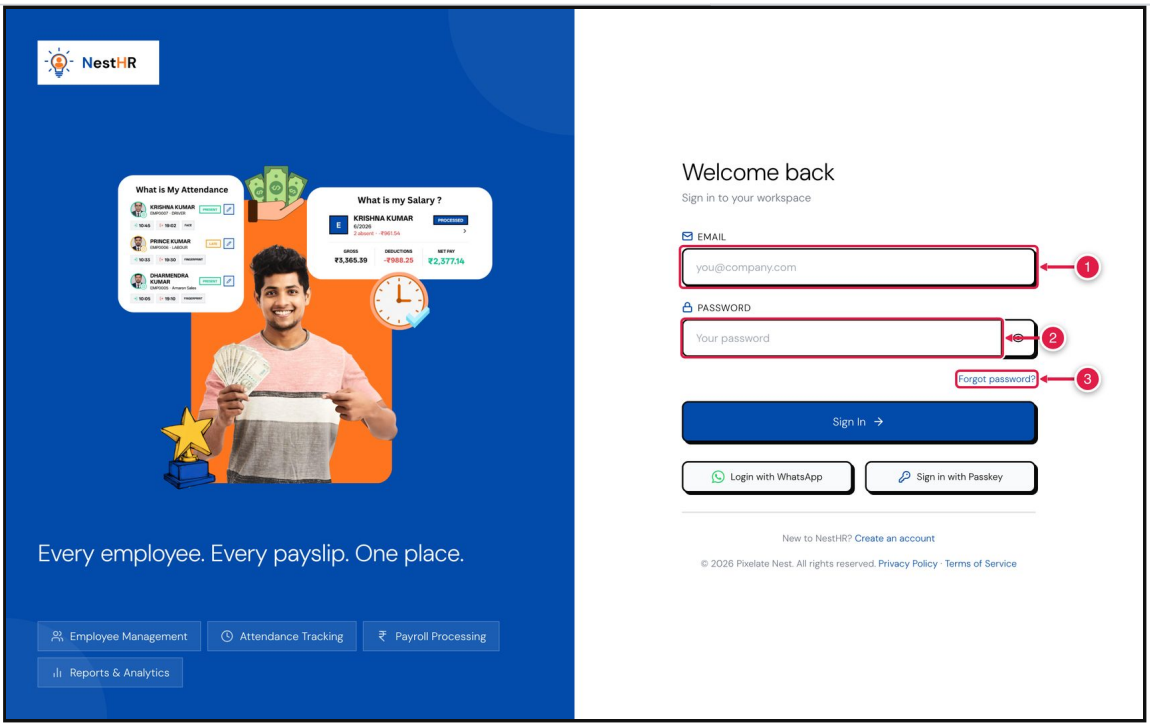


Figure 1. The login page.

1. **Email**: your work email.
2. **Password**: use the eye icon to show or hide what you type.
3. **Forgot password?**: sends a reset link to your email.

Forgot your password?

1. On the login page click **Forgot password** and enter your email.
2. Open the email we send you and click the reset link.
3. Choose a new password and sign in again.

> **NOTE**
> Employees get their login from HR. If you cannot sign in, ask HR to check **People › Credentials** (see Chapter 5).

Switch on two-factor authentication (2FA)

2FA adds a second lock: a code from an authenticator app. We recommend it for every Admin and HR user.

Settings › **Account Security**

1. Open **Settings › Account Security** and choose to enable 2FA.
2. Scan the QR code with an authenticator app (Google Authenticator, Microsoft Authenticator, Authy).
3. Type the 6-digit code to confirm. From then on you will be asked for a code at each login.

The screen layout

Area	What it does
Left sidebar	All pages, grouped by topic. Click a group heading to open or close it.
Top bar	Page title, your profile menu (profile, password, logout) and quick actions.
Main area	The page itself: filters and search on top, then lists, calendars and forms.
Confirmation pop-ups	Before anything important is saved or deleted you will be asked to confirm. Read the text, then confirm or cancel.

> **TIP**
> Most lists have a **search box** and a **filter**. Use them instead of scrolling. Many pages also have an **Export** button for Excel/PDF.

PEOPLE

Dashboard

03

The first page you see: a live picture of your workforce today.

WHERE	WHO CAN USE IT	WHAT IT IS FOR
Overview › Dashboard	Admin, HR Manager, HR Executive, Dept Head	See headcount, today's attendance, pending work and payroll at a glance

What the cards show

Card	Meaning
Total Employees	Active employees in your company.
Today's Attendance	Present, Late, Absent and On Leave counts for today.
Attendance Rate	Share of the team that is present today.
Pending Leaves	Leave requests waiting for a decision. Click to open Leave.
New Hires	People who joined recently.
Monthly Payroll	Salary cost for the current month.
Departments	How many departments exist and their size.

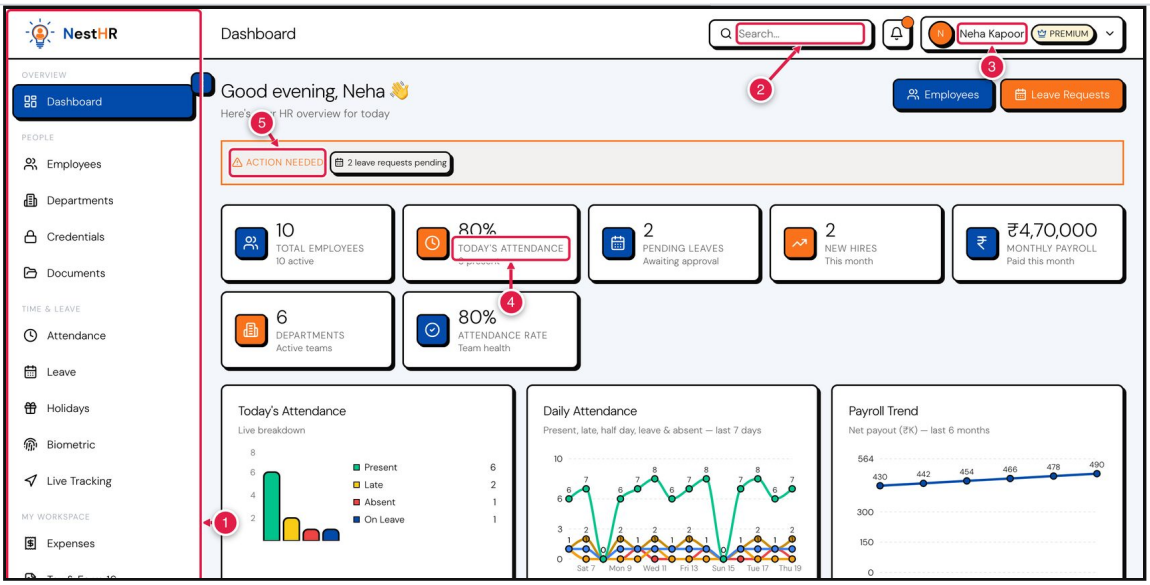


Figure 2. The Dashboard for an Admin or HR user.

1. **Sidebar**: every page, grouped by topic.
2. **Search**: jump to a page or record.
3. **Profile menu**: your name and plan; open it to change your password or log out.
4. **Summary cards**: click any card to open the page behind it.
5. **Action needed**: work waiting for you, such as pending leave.

Daily use

1. Open the Dashboard each morning and check **Pending Leaves**.
2. If **Absent** or **Late** looks high, click through to **Attendance** to see who.
3. Use the cards as shortcuts. Each one opens the page behind it.

> **NOTE**
>
> **Department Heads** see the same cards, limited to the information their role allows. **Employees** do not see this page; they have **My Dashboard** (Chapter 21).

PEOPLE

Employees

04

Create and manage every employee record, from joining details to salary, shifts and face enrolment.

WHERE	WHO CAN USE IT	WHAT IT IS FOR
People › Employees	Admin, HR Manager, HR Executive, Dept Head	Employee master data used by attendance, leave and payroll

Add a new employee

Click **Add Employee**. The form has four tabs. Fields marked with a red * are compulsory.

Tab	What you enter
1. Basic Info	First and last name, work email, mobile, designation, joining date, gender, department, employment type, and (for Admin/HR) the user **Role**.
2. Attendance	Work days per week, overtime, biometric user ID, shift, and mobile geofenced attendance.
3. Salary	Monthly salary, PF / UAN / ESIC numbers and salary history.
4. Other Info	Date of birth, addresses, emergency contact, PAN and Aadhaar, family, qualification, previous employer and bank details.

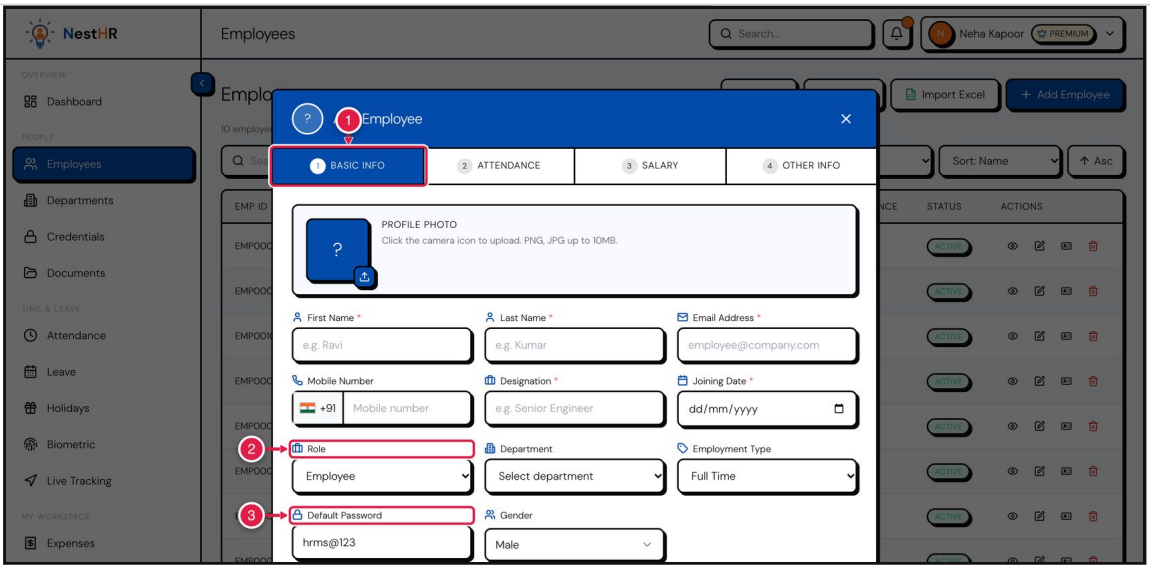


Figure 3. The Add Employee form (tab 1 of 4).

1. **Tabs**: Basic Info, Attendance, Salary, Other Info.
2. **Role**: Employee, Department Head, HR Manager or Admin.
3. **Default Password**: the employee can change it after the first login.
4. **Next**: go to the next tab. The last tab has Save.

Tab 1: Basic Info

- **Role**: Employee, Department Head, HR Manager or Admin. Only Admins can give the two highest roles. A **Department Head** must also be linked to the department they lead.
- **Work email** must be unique. It becomes the employee's login name.
- **Employment type**: Full time, Part time, Contract or Intern.

Tab 2: Attendance

- **Work days per week**: choose 5, 6 or 7, or **Custom** and tick the exact weekdays (for example Mon, Wed, Fri). Attendance and payroll then count only those days.
- **Enable Overtime**: turn on if this person should be paid overtime. You do not enter a rate here; overtime is calculated from their salary and shift.
- **Biometric User ID**: the ID of this person on your attendance device.
- **Shift**: pick a saved shift, **None**, or **Custom shift** (this person only: start, end, break minutes and OT-after hours).
- **Mobile Geofenced Attendance**: lets the person punch from the mobile app with a selfie, either from anywhere or only inside a location (latitude, longitude and radius). Use **Find office location** to search an address or paste a Google Maps link.

> **NOTE**
> The shift decides when a person counts as **Late** and when overtime starts. Create shifts first in **Manage › Shift Timings** (Chapter 18).

Tab 3 and 4: Salary and Other Info

- Enter the **Monthly Salary** (compulsory for new employees). Payroll is built from this figure.
- Add PAN and Aadhaar numbers, and upload the **PAN Document**, **Aadhaar Document** and **Resume / CV** (PDF, JPG or PNG, max 5 MB each). These files are stored securely.

- Add bank details (account holder, account number, IFSC, bank name) so salary files for the bank can be produced.

1. Fill the tabs, using **Next** to move along.
2. Click **Save** on the last tab and confirm.
3. The employee now appears in the list.

Find, edit and manage employees

Task	How
Search / filter	Use the search box and filters (department, status, type) at the top of the list.
Edit	Open the employee's row and choose edit. Change any tab and save.
Import many at once	Choose **Download Template**, fill the Excel sheet, then import it. Rows with errors are listed so you can fix and re-import.
Export	Use the export button for Excel or PDF.
Enrol face	Open the employee and capture a face photo so they can punch by face. Use **Reset Face** if recognition keeps failing and enrol again.
Terminate	Choose terminate on the employee. They no longer count in new attendance and payroll runs. Use Exit Management (Chapter 16) for a full exit.

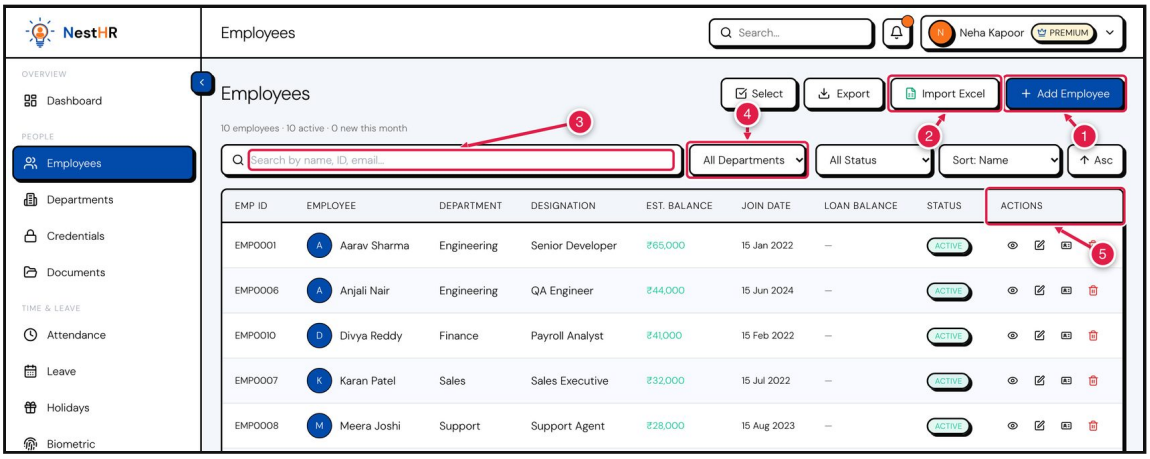


Figure 4. The Employees list.

1. **Add Employee**: opens the four-tab form.
2. **Import Excel**: add many employees from a sheet.
3. **Search** by name, ID or email.
4. **Filters**: department, status and sorting.
5. **Actions**: view, edit, ID card and delete for each row.

IMPORTANT

Changing an employee's **salary, shift or work days** affects future attendance and payroll calculations. Do it before running payroll, not after.

PEOPLE

05

Departments, Credentials & Documents

Departments

WHERE	WHO CAN USE IT	WHAT IT IS FOR
People › Departments	Admin, HR Manager	Group employees and give a department its own shift timing

1. Click **Add Department**.
2. Enter the **Department Name** and a short **code** and optional description.
3. Optionally set **Shift Start Time** and **Shift End Time** if the whole department works the same hours.
4. Save. To stop using a department, choose **Deactivate**.

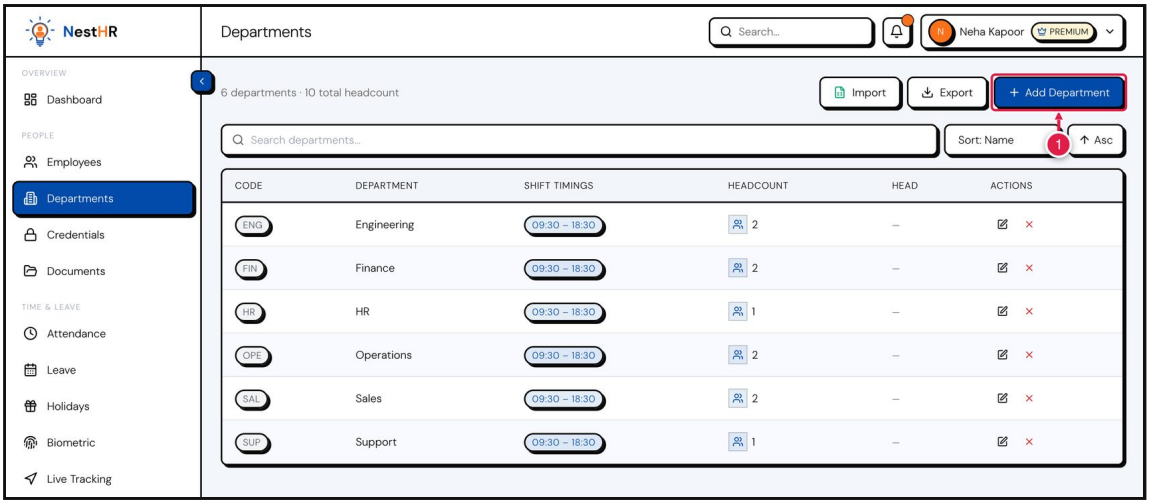


Figure 5. The Departments page.

1. **Add Department**: name, code and optional shift timing.

Credentials (logins for employees)

WHERE	WHO CAN USE IT	WHAT IT IS FOR
People › Credentials	Admin, HR Manager	Create logins and reset passwords

Every employee who should use the app needs a login. New employees created with a default password already have one; use this page to create missing logins or fix access problems.

1. Search the employee (by name or email) in the list.
2. To give someone a login, choose **Create New**, pick the employee and set or generate a password. Share the email and password with them safely.
3. To help someone who forgot their password, click **Reset Password** on their row and set a new one.

> **TIP**
> Ask employees to change the password after the first login: **My Dashboard › Settings › change password**.

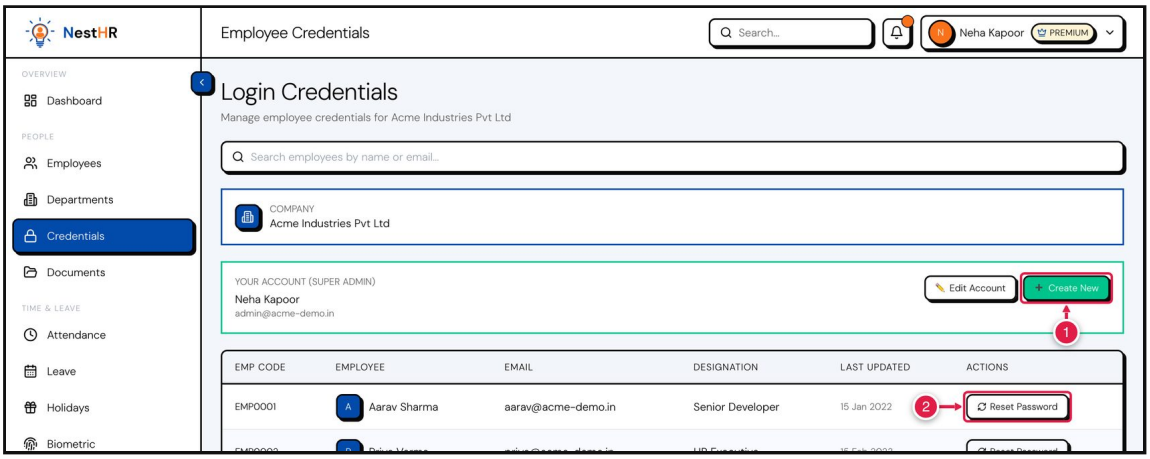


Figure 6. The Credentials page lists each employee with their login email.

1. **Create New**: add a login.
2. **Reset Password**: set a new password for that employee.

Documents (Document Vault)

WHERE	WHO CAN USE IT	WHAT IT IS FOR
People › Documents	Admin, HR Manager, HR Executive, Employee	A safe place for employee paperwork

Store and find files for each person: Aadhaar, PAN, Driving License, ID Proof, Certificate, Contract, Resume, Offer Letter and Other.

1. Click **Upload** and choose the employee (HR) or just upload your own (employee).
2. Pick the **document type**, give it a title, choose the file and confirm.
3. Later use **Replace file** to update it, or delete it if uploaded by mistake.

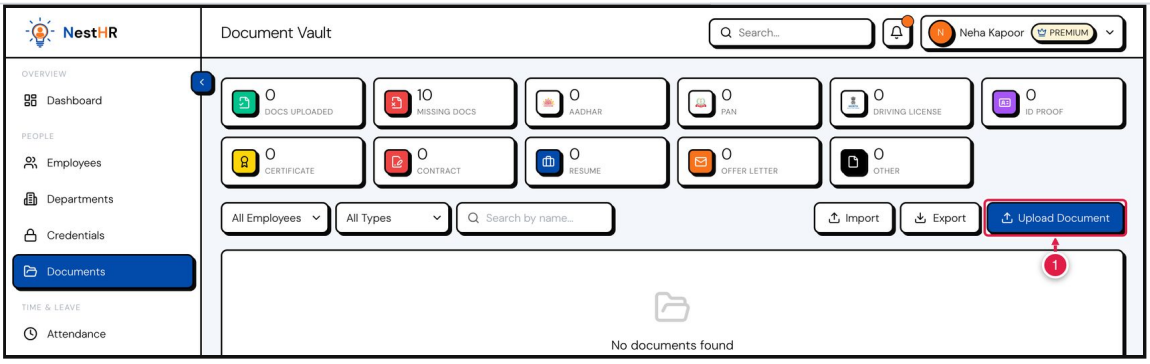


Figure 7. The Document Vault. The tiles at the top count documents by type.

1. **Upload Document**: choose the employee, type and file.

> **NOTE**
> Employees see only their own documents. Files above the size limit are refused with a message.

TIME & LEAVE

Attendance

06

See who is in, mark or correct attendance, and understand every status.

WHERE	WHO CAN USE IT	WHAT IT IS FOR
Time & Leave › Attendance	Admin · HR Manager · HR Executive · Dept Head	Daily and monthly attendance for the whole team

Attendance statuses

Status	Meaning
Present	Checked in on time.
Late	Checked in after the shift start plus the grace time.
Pending approval	Late beyond the monthly free-late allowance. It waits for HR in **Late Approvals** and is **not penalised** until decided (Chapter 7).
Half day	Worked about half the shift.
Absent	No attendance on a working day.
On leave	An approved leave covers the day.
Holiday / Weekend	A company holiday or a non-working day for that employee.

Read the page

- Pick the **date** or month at the top. Cards show the count for each status; click a card to filter the list.
- Each row shows employee, check-in, check-out, hours, overtime and **how** the punch was made (Fingerprint, Card, Face, Password or Manual).
- Insights such as **Usually first in** and **Usually last in** help you spot patterns.
- Use **Save view** to remember a favourite set of filters and **View saved** to reopen it.

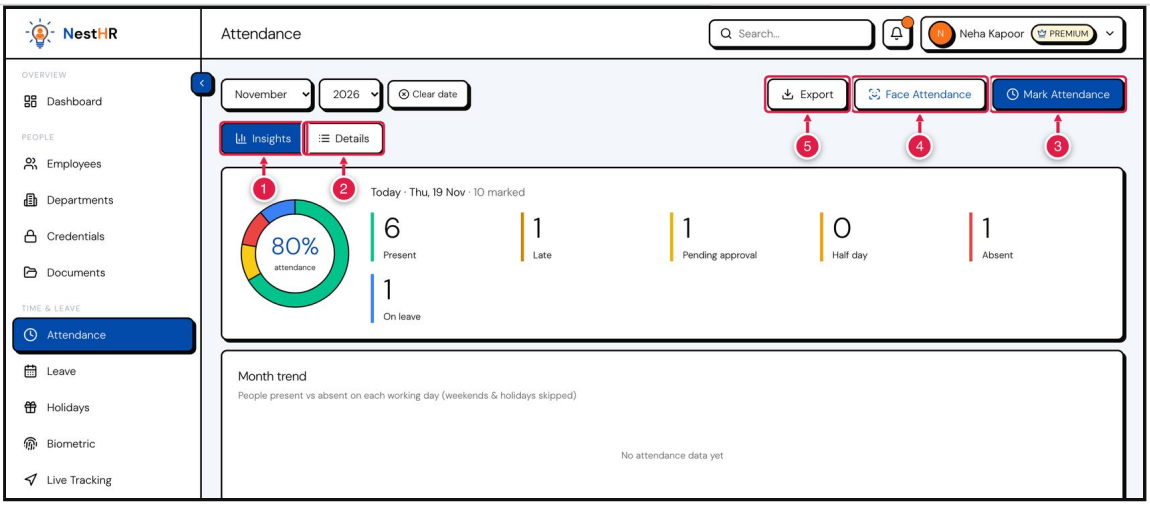


Figure 8. Attendance: the Insights view for today.

1. **Insights**: counts, charts and trends.
2. **Details**: the row-by-row list with check-in and check-out.
3. **Mark Attendance**: add or correct a record.
4. **Face Attendance**: open the face check-in screen.
5. **Export**: Excel or PDF.

Mark or correct attendance

1. Open the day, then choose **Mark attendance** for a person (or edit an existing row).
2. Select the **Status**. Add **Check In** and **Check Out** times if the person worked.
3. Optionally enter **Overtime hours** (leave blank to let NestHR calculate from the shift) and choose **Via** (Manual, Fingerprint, Face, Card, Password).
4. Add a **note** if useful, then save and confirm.

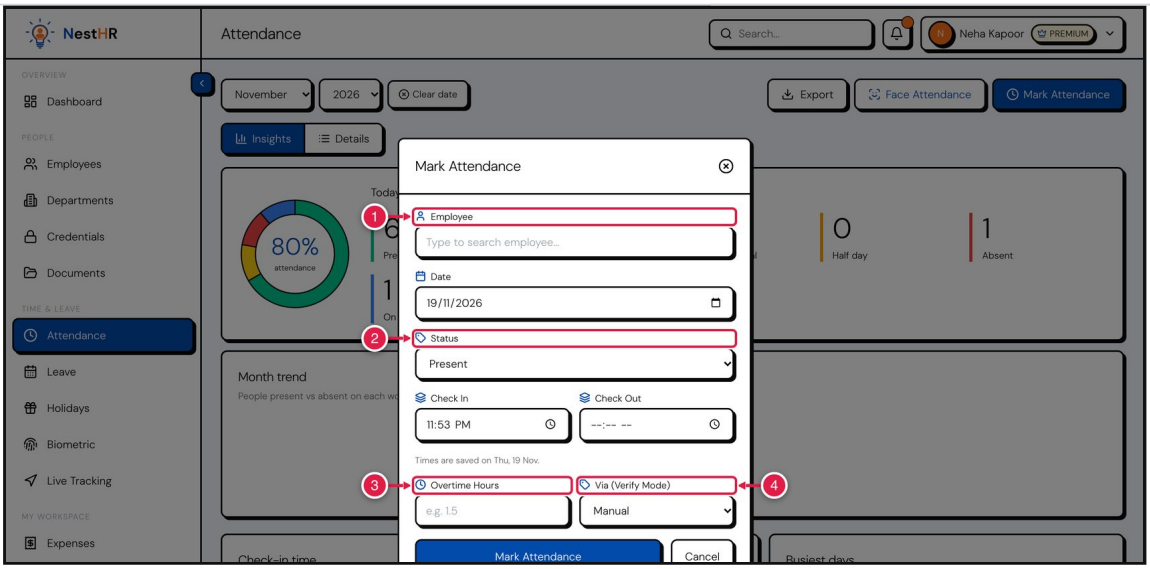


Figure 9. The Mark Attendance form.

1. **Employee**: search by name.
2. **Status**: Present, Late, Half day, Absent and more.
3. **Overtime Hours**: leave blank to calculate automatically.
4. **Via (Verify Mode)**: Manual, Fingerprint, Face, Card or Password.

Update many people at once

Use the bulk option to apply one status or time to a group (for example mark a whole team Present). Anyone on a holiday that covers them is skipped and listed with the reason.

> **IMPORTANT**
>
> Attendance feeds **payroll**. If you correct a past day after payroll was processed, use **Regenerate** in Payroll (Chapter 11) so the salary picks up the change.

> **NOTE**
>
> Employees can also punch themselves from the mobile app, by face on a kiosk, or on a biometric device. Those punches appear here automatically.

TIME & LEAVE

07

Attendance Settings & Late Approvals

Set the rules for lateness and free leave, then decide the exceptions.

Attendance Settings

WHERE	WHO CAN USE IT	WHAT IT IS FOR
Finance & HR › Attendance Settings	Admin, HR Manager	Company-wide rules that attendance and payroll follow

Section	What it controls
Late Allowance	How many late arrivals each employee gets free every month. Beyond that, a late arrival waits for HR approval.
Leave Allowance	How many leave days per month are covered without salary deduction. Extra leave is left for HR to treat as paid or unpaid.

1. Open **Attendance Settings**.
2. Set the allowances (you can also set them for particular employees).
3. Click **Save attendance settings** and confirm.

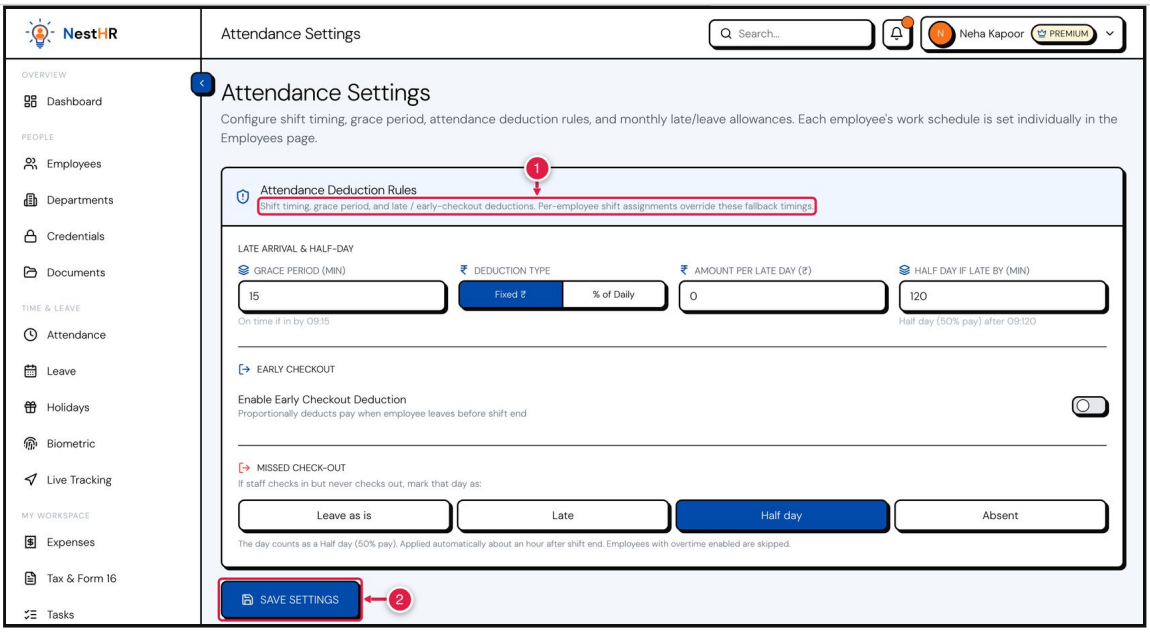


Figure 10. Attendance Settings.

1. **Grace period**: minutes allowed before a punch counts as late.
2. **Save settings**: always click this after changing a rule.
3. **Late Allowance** and **Leave Allowance**: further down the page.

Late Approvals

WHERE	WHO CAN USE IT	WHAT IT IS FOR
Finance & HR › Late Approvals	Admin, HR Manager	Decide what a late arrival beyond the allowance counts as

1. Employee arrives late
2. Free allowance used up
3. Shows as **Pending approval**
4. HR decides
5. Attendance updated

1. Open **Late Approvals**; the pending list shows the employee, date, check-in time and minutes late.
2. Choose the outcome: **Present** (forgive), **Late**, **Half Day** or **Absent**.
3. Confirm. The attendance row changes at once and the employee is notified. Clear this list **before** payroll; items still pending count as present with no late deduction.

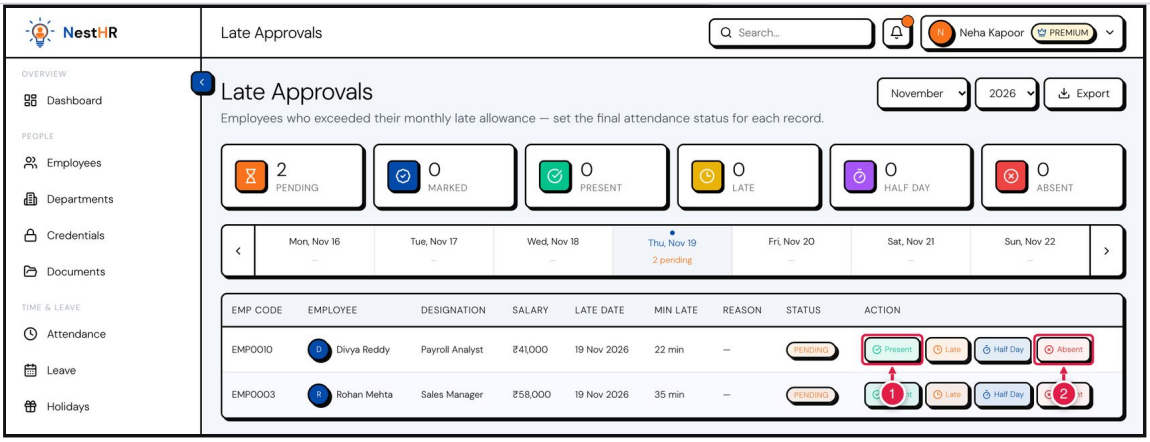


Figure 11. Late Approvals: pending arrivals with one-click decisions.

1. **Present**: forgive the late arrival.
2. **Absent**: mark the day absent. **Late** and **Half Day** are the buttons between.

TIME & LEAVE

Leave

08

Apply for leave, approve or reject requests, and keep balances right.

WHERE	WHO CAN USE IT	WHAT IT IS FOR
Time & Leave › Leave	Admin, HR Manager, HR Executive, Dept Head	Leave requests and approvals for the company

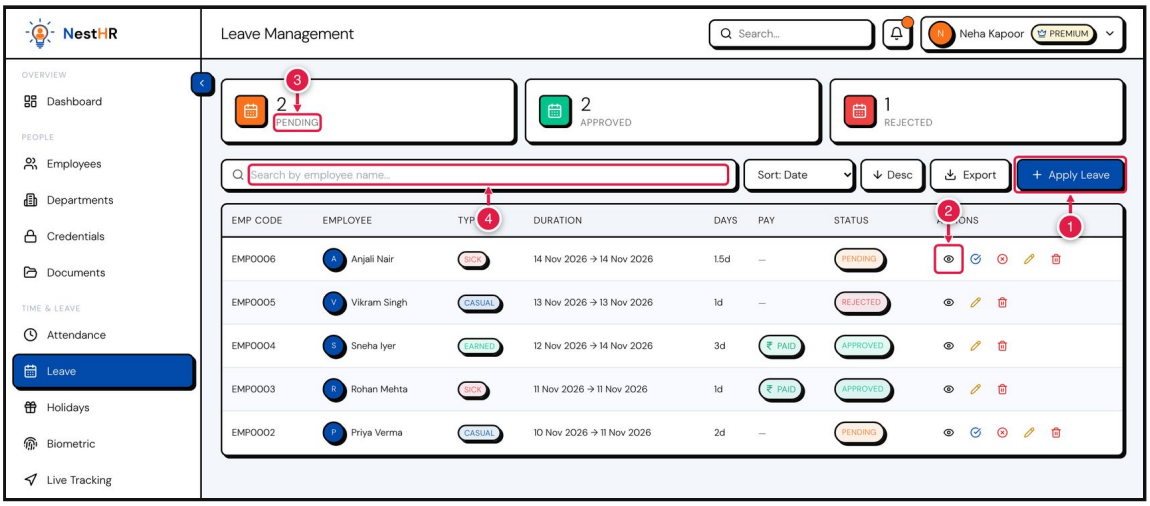


Figure 12. The Leave page.

1. **Apply Leave**: open the request form.
2. **Eye icon**: read the full reason.
3. **Pending / Approved / Rejected** counts.
4. **Search** by employee name.

Apply for leave

1. Click **Apply**. HR users first choose the **Employee**.
2. Choose the **Leave Type** (Casual, Sick, Earned, Maternity, Paternity, Unpaid or Comp-off).
3. Pick the **Start Date** and **End Date**. **Number of Days** fills in itself; change it to **0.5** for a half day.
4. Write the **Reason** and attach a **Supporting Document** if required (for example a medical certificate for sick leave).
5. Submit. The request shows as **Pending**.

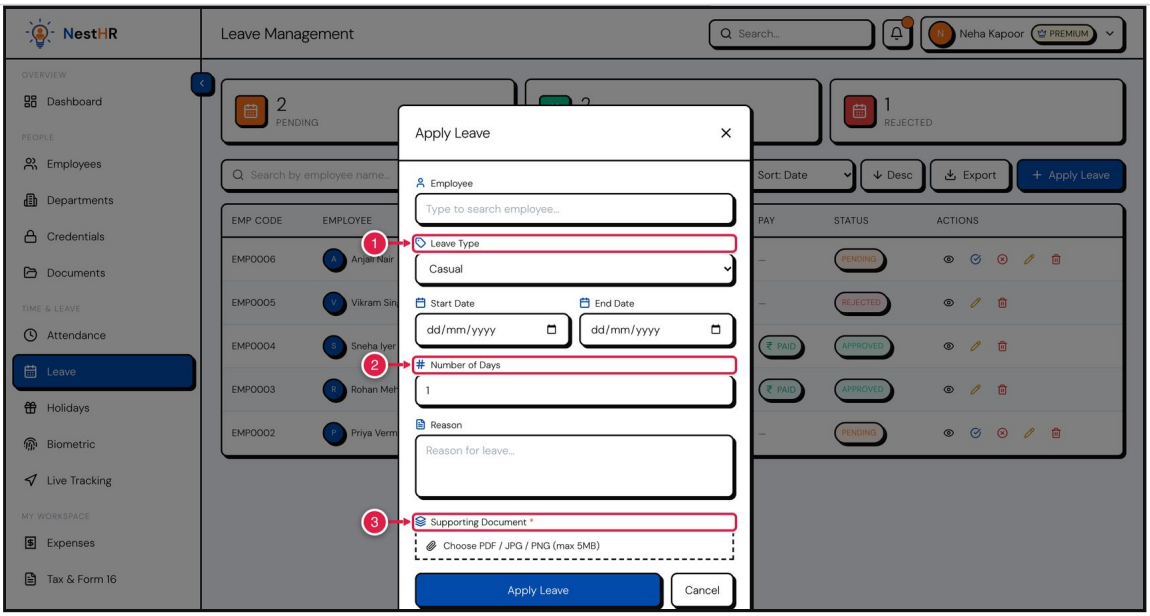


Figure 13. The Apply Leave form.

1. **Leave Type**.
2. **Number of Days**: fills in from the dates; type 0.5 for a half day.
3. **Supporting Document**: required for some leave types.

Approve, reject or cancel

Action	How it works
Approve	Open the request and confirm. Choose whether the leave is **Paid** or **Unpaid** (unpaid days are deducted from salary). Attendance for those days becomes **On leave**.
Reject	Type a **rejection reason**. The employee sees it.
Cancel an approved leave	Type a **cancellation reason**. Attendance for those days is freed.
Withdraw	An employee can withdraw a request that is still pending.

> **NOTE**
> Every row has an **eye icon**. Click it to read the full leave reason without cluttering the table. The “Free leave” figure shows how much of the monthly allowance the person has used.

Statuses

Pending waiting for a decision **Approved** accepted **Rejected** declined

TIME & LEAVE

Holidays

09

Publish the holiday calendar and choose exactly who it applies to.

WHERE	WHO CAN USE IT	WHAT IT IS FOR
Time & Leave › Holidays	Admin, HR Manager, HR Executive, Dept Head	Company holidays shown on a calendar

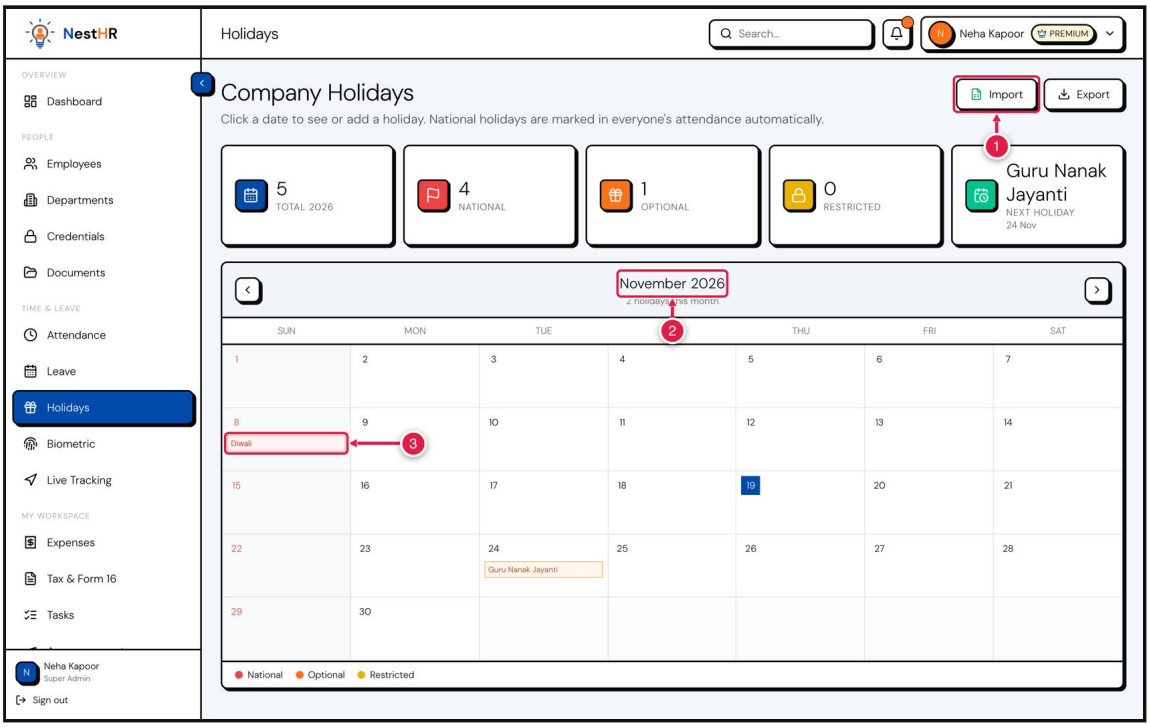


Figure 14. Company Holidays. National holidays are marked in everyone's attendance.

1. **Import**: add holidays from Excel.
2. **Month view**: use the arrows to change month.
3. **A holiday** appears on its date; click any day to add or edit.

Add a holiday

1. Open **Holidays** and click the **day** on the calendar. A panel opens for that date.
2. Enter the **holiday name**, choose the **type** and add a description if you wish.
3. Under **Applies to** choose who gets the holiday: **All employees**, **Selected departments** or **Selected employees**, then tick the departments or people.
4. Click **Add Holiday** and confirm.

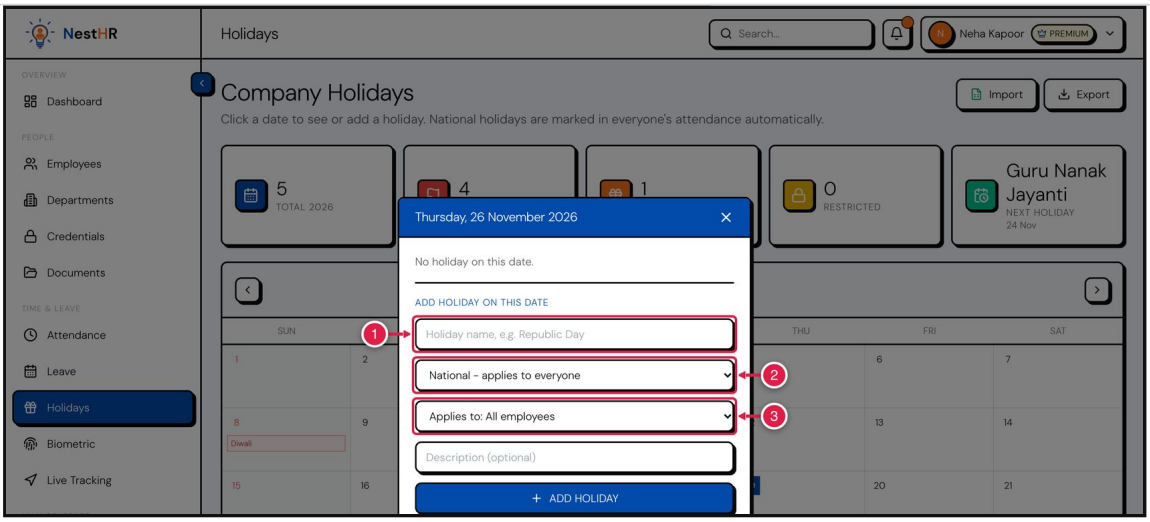


Figure 15. Clicking a date opens the Add Holiday panel.

1. **Holiday name**.
2. **Type**: National, Optional or Restricted.
3. **Applies to**: all employees, selected departments or selected employees.

Type	Meaning
National	Applies to everyone chosen. Their attendance is marked **Holiday** automatically.
Optional	Employees may choose to take it.
Restricted	Limited to specific employees.

EXAMPLE

Diwali for everyone: choose **National** and **All employees**. A factory-floor-only holiday: choose **Selected departments** and tick Production.

TIP

To add many holidays together, use the **Import** button with an Excel file (name, date, type, description). Switch the calendar by month or year to review.

TIME & LEAVE

10 Biometric Devices & Live Tracking

Connect attendance machines, face kiosks and cards, and see field staff on the move.

WHERE	WHO CAN USE IT	WHAT IT IS FOR
Time & Leave › Biometric	Admin, HR Manager	Connect devices so punches reach attendance automatically

The Biometric page has four tabs: **Locations & Devices**, **ADMS / ESSL Sync**, **Hikvision Setup** and **Activity Logs**.

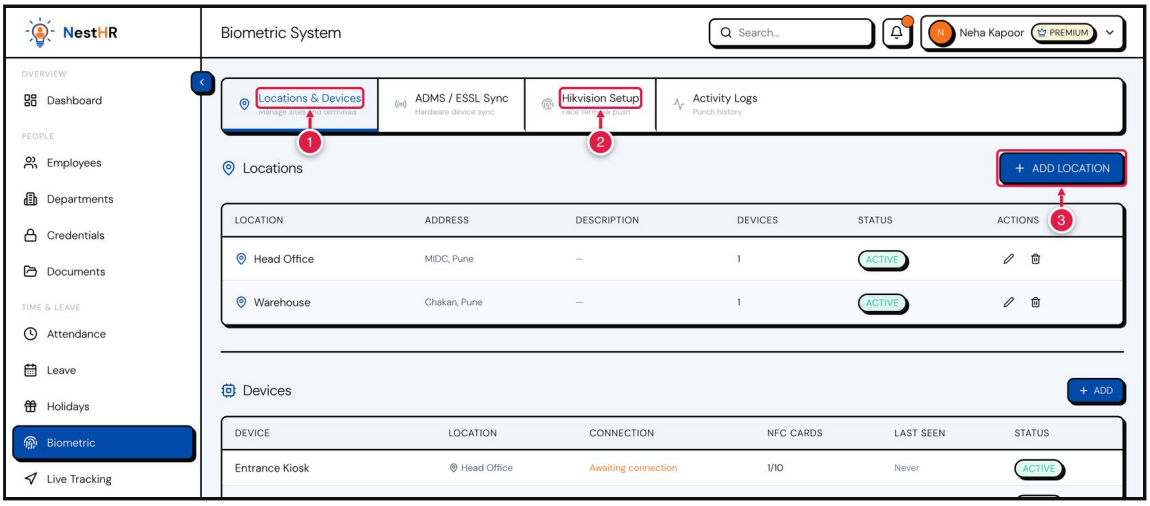


Figure 16. The Biometric page and its four tabs.

1. **Locations & Devices**: your sites and their devices.
2. **Hikvision Setup**: connect Hikvision face terminals.
3. **Add Location**: create a site first, then add devices to it.

Locations & Devices

1. Add a **Location** (for example Head Office) with its address.
2. Add a **Device** under that location. NestHR gives it a private **device link** that opens a check-in screen for NFC cards, face or PIN. Open that link on a tablet at the entrance.
3. Assign **NFC cards** to employees (scan the card or type the card number) and remove them when someone leaves.
4. Use **Regenerate token** if a device link is lost; the old link stops working.

ADMS / ESSL machines

For ESSL / ZKTeco type machines that push punches: open the device on this tab, enter the machine's **serial number**, and use the sync buttons to push employees and face templates to the machine.

Hikvision face terminals

Hikvision terminals (for example DS-K1T320) send each punch to your own private address. NestHR creates that address for your company with one click.

Time & Leave › Biometric › Hikvision Setup

1. Click **Generate device setup**. Three values appear: server name, URL and port. Keep them private.
2. Put the terminal on your network and open its web page (https://<device-ip>). Log in as admin.
3. Set **DNS** to 8.8.8.8 under Network settings, and check the device time zone and time.
4. Go to **Network › Device Access › ISUP Listening** and paste the three values. Save.
5. In **Person Management** add each person with an **Employee ID exactly equal to their NestHR employee ID**, and enrol their face or fingerprint.
6. Ask someone to punch. The first punch of the day is check-in; a later punch is check-out. Check the **Attendance** page.

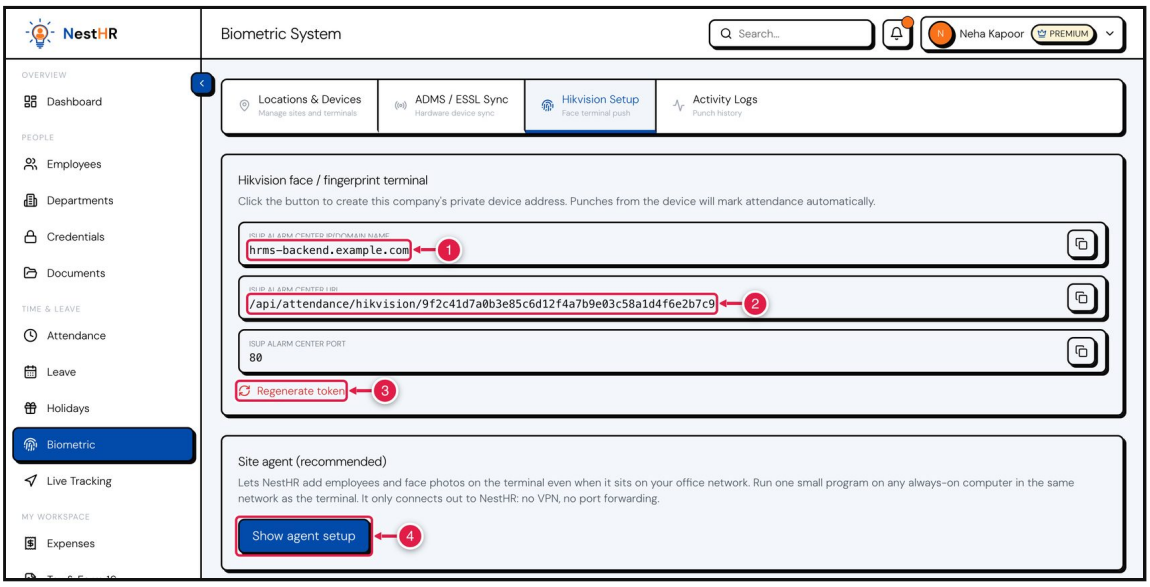


Figure 17. The Hikvision Setup tab after clicking Generate device setup.

1. **Server name**: type this into the terminal.
2. **URL**: includes your private token. Keep it secret.
3. **Regenerate token**: makes the old URL stop working.
4. **Show agent setup**: the optional site agent (below).

Send employees to the terminal automatically

Below the push address are two optional sections that copy employees and face photos from NestHR to the terminal, so you do not add people twice.

- **Site agent (recommended)**: a small program that runs on any always-on computer on the same network as the terminal. It only connects out to NestHR, so you need no VPN or port forwarding. Click **Show agent setup**, install Node.js 18 or newer, download the two agent files into one folder, run the command shown

(with the device IP and password), and wait for **Agent online** to turn green. Then use **Sync all employees now**.

- **Direct push**: only if your server can reach the device's IP address. Enter the device IP, port, username and password, tick **Device uses HTTPS** if needed, then **Save & test connection** and **Sync all employees now**.

> **IMPORTANT**
> If the Employee ID on the device does not match NestHR, the punch is ignored. Using **Regenerate token** changes the URL, so update every device afterwards.

Activity Logs

A history of every punch received from devices, with filters by location and date. Use it to find out why a punch is missing.

Live Tracking

WHERE	WHO CAN USE IT	WHAT IT IS FOR
Time & Leave › Live Tracking	Admin, HR Manager, HR Executive, Dept Head	Last known location of field employees

- Live Tracking must be switched on for your company and for each field employee.
- The page lists tracked employees with their **last location**, distance travelled and last update time. It refreshes about every 30 seconds.
- Click **View on Google Maps** to open a person's position.

> **NOTE**
> Tell employees clearly when location tracking is on, and track only during work. Follow your local privacy rules.

MONEY

Payroll

11

Turn attendance, leave, loans and bonuses into correct salaries, payslips and bank files.

WHERE	WHO CAN USE IT	WHAT IT IS FOR
Finance & HR › Payroll	Admin, HR Manager	Monthly salary processing, payslips and exports

The monthly payroll cycle

1. Check attendance and Late Approvals
2. Add bonuses, penalties, loans
3. **Preview** payroll
4. **Process** payroll
5. Mark paid and share slips

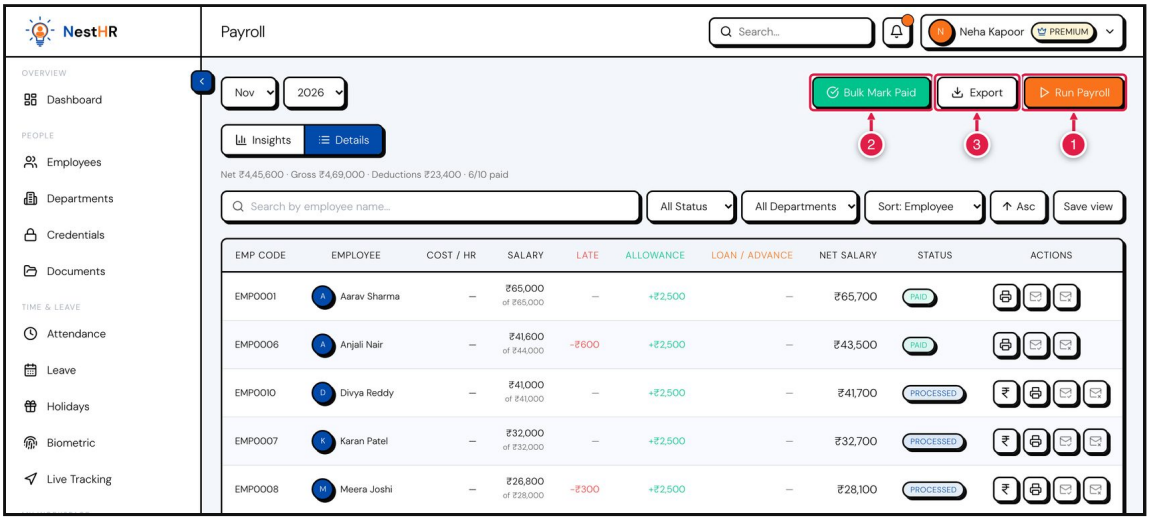


Figure 18. Payroll in the Details view for the month.

1. **Run Payroll**: process or regenerate salaries.
2. **Bulk Mark Paid**: mark all processed salaries as paid.
3. **Export**: Tally, Zoho, Bank CSV and more.

Process payroll

1. Open **Payroll** and choose the **month and year**.
2. Click **Process**. Choose **All employees** or pick specific people.
3. Click **Preview** to see each person's gross, deductions and net salary before anything is saved.
4. If everything looks right, confirm to **Process**. Payroll rows appear with status **Processed**.

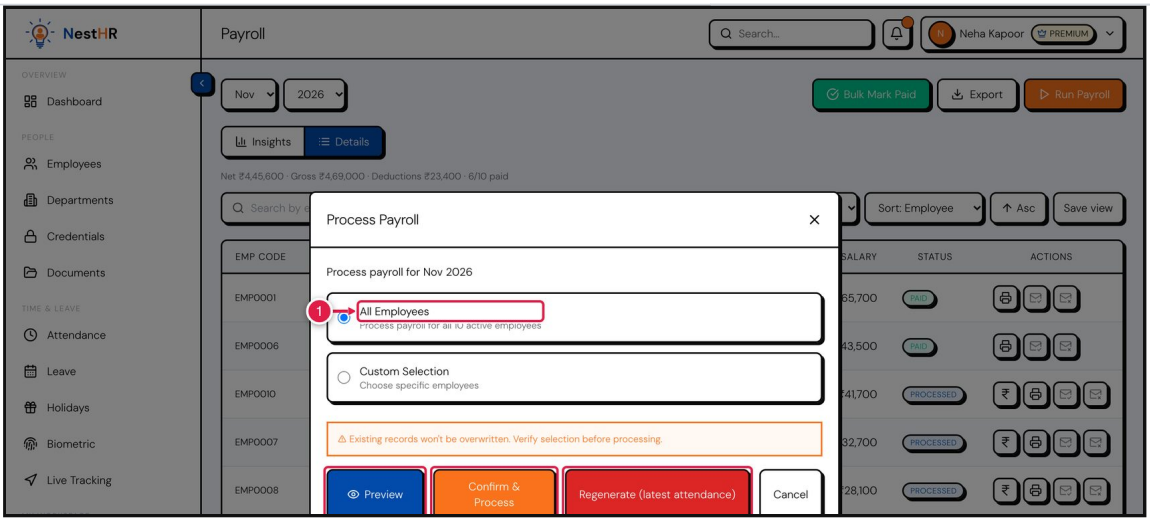


Figure 19. The Process Payroll window.

1. **All Employees** or **Custom Selection**.
2. **Preview**: see the result before saving anything.
3. **Confirm & Process**: save the payroll.
4. **Regenerate (latest attendance)**: rebuild unpaid payrolls.

How each salary is worked out

Line	Where it comes from
Earned basic	Monthly salary divided by working days, multiplied by days worked.
Late / Half day / Absent / Early out	Deductions based on attendance and your rules.
Allowance, Bonus, Overtime	Pending additions entered for the employee (Loans & Advances and other transactions).
Penalty	Pending penalties entered for the employee.
Loan / Advance	The monthly EMI of any active loan, taken only if salary can cover it.
Net salary	Gross minus all deductions.

> **NOTE**
> Employees with **no attendance records** in the pay period are skipped and listed with the reason, so nobody gets a zero payslip by accident. The pay period (for example 1st to month end) is set in **Settings**.

Changed something? Regenerate

If attendance, leave or a Late Approval changed after you processed payroll, you do not need to start again.

1. Open the Process dialog, choose the employee (or everyone).
2. Click **Regenerate (latest attendance)** and confirm.
3. NestHR first **gives back** the loan EMI and re-opens the bonuses and penalties used by the old run, then rebuilds the payroll from attendance up to today.

IMPORTANT

Paid payrolls are never changed by Regenerate. Regenerate before you mark salary as paid. Very old payrolls made before this feature that include a loan EMI are left as they are and listed as skipped; adjust them by editing the payroll.

Mark as paid

1. Open the payroll row and choose **Mark as Paid** (or **Bulk Mark Paid** for many).
2. Select the **Mode of Payment**: Bank Transfer, Cash, UPI or Cheque.
3. Click **Confirm & Mark Paid**. The row becomes **Paid** and the payslip is available to the employee.

Payslips and exports

Need	Use
One payslip	Open the row and print the slip.
All payslips	**Bulk Slips (print)**.
Accounting software	**Tally XML** or **Zoho CSV**.
Bank salary upload	**Bank CSV**.
Cheque printing	Upload your cheque design in **Settings** and print from Payroll.

MONEY

Loans & Advances

12

WHERE	WHO CAN USE IT	WHAT IT IS FOR
Finance & HR › Loans & Advances	Admin, HR Manager	Lend money to staff and recover it through salary

Employees can ask for a loan or salary advance from **My Loans**. HR can also give one directly.

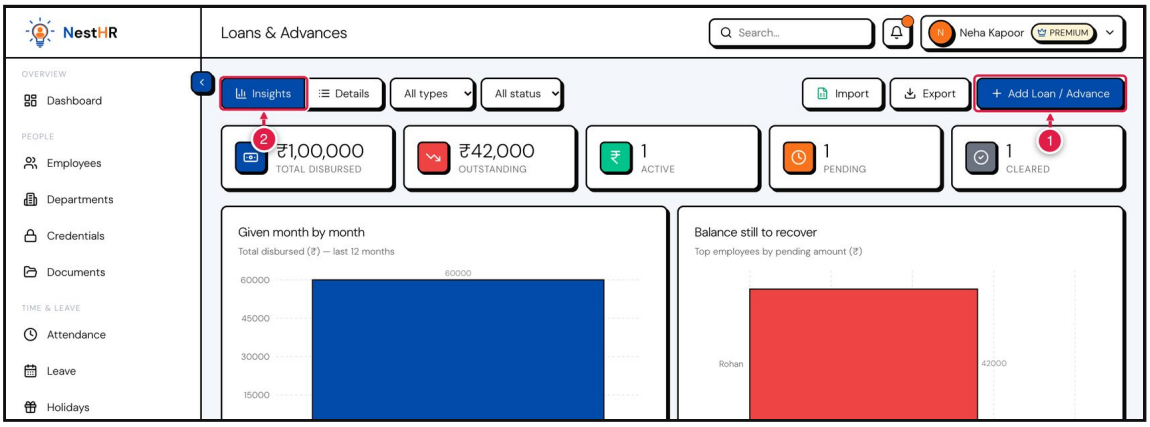


Figure 20. Loans & Advances.

1. **Add Loan / Advance**.
2. **Insights** and **Details** views.

Give a loan or advance

1. Click **Add Loan / Advance** and choose the employee.
2. Choose **Type** (Loan or Salary advance), enter the **Amount** and **Monthly EMI** (or the number of months to repay).
3. Set **Disbursed On**, a **Reason** and optional **Remarks** for your own notes.
4. Save. The loan becomes **Active** and the EMI is deducted automatically in each payroll.

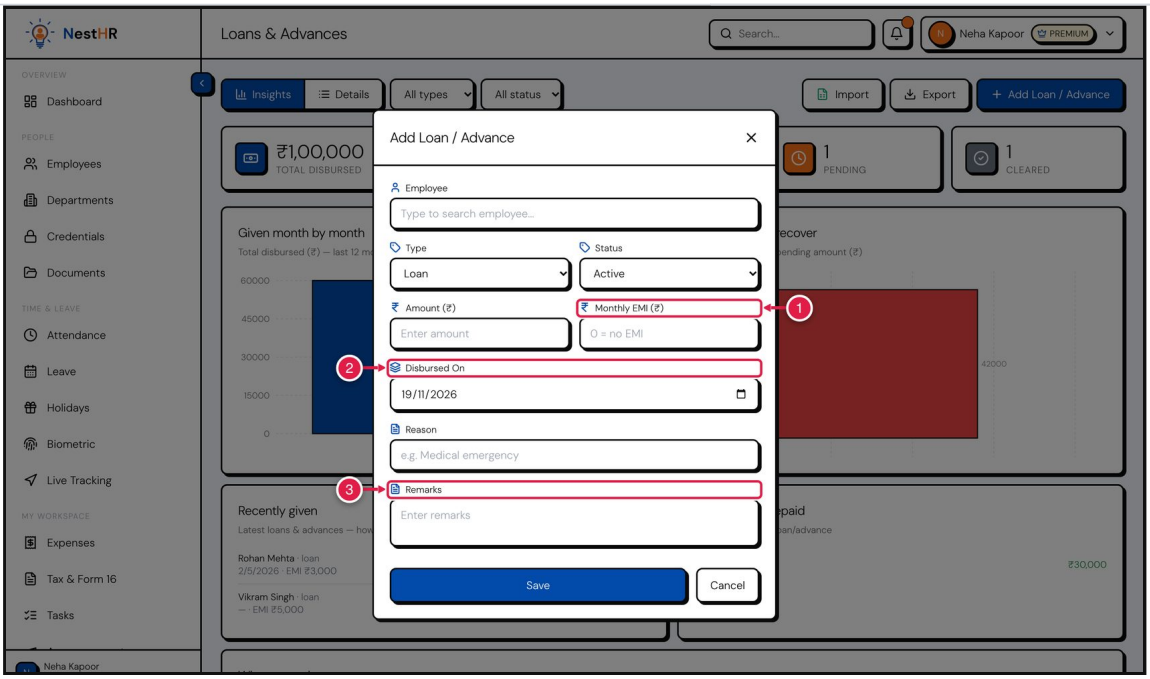


Figure 21. The Add Loan / Advance form.

1. **Monthly EMI**: deducted from each salary.
2. **Disbursed On**: the date the money was given.
3. **Remarks**: internal notes.

Review requests

Requests from employees arrive as **Pending**. Open one and choose **Approve** (you may adjust the EMI) or **Reject** with a reason.

Card / status	Meaning
Total Disbursed	Money lent so far.
Outstanding	Amount still to be recovered.
Active	Being repaid through payroll.
Pending	Waiting for approval.
Cleared	Fully repaid.

> **TIP**
> The EMI is deducted only up to what the month's salary can cover, so a loan never makes net pay negative.

MONEY

Expenses

13

WHERE	WHO CAN USE IT	WHAT IT IS FOR
My Workspace › Expenses	Admin, HR Manager, HR Executive, Dept Head, Employee	Claim and reimburse work expenses

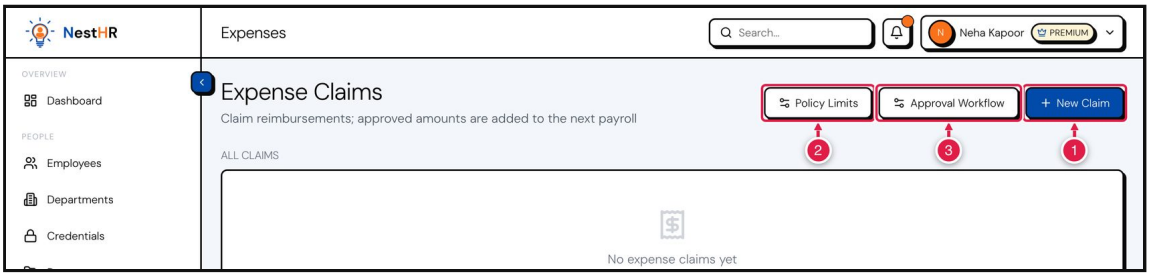


Figure 22. Expense Claims.

1. **New Claim**.
2. **Policy Limits**: set maximum amounts.
3. **Approval Workflow**: choose who approves.

Make a claim

1. Start a new claim.
2. Describe what it was for and enter the **Amount**. For travel add **From / To** and **Distance (km)**; for fuel add **Litres**; add dates where asked.
3. Attach the bill or receipt and add notes.
4. Submit. The claim follows your company's **approval workflow**.

Approve and pay (HR)

1. Open a claim, review the bill, and **Approve** or **Reject** with a comment.
2. After approval choose **Mark as paid**, pick the mode and enter a **Reference / UTR / cheque number**.
3. A rejected claim can be corrected and **resubmitted** by the employee.

Set the rules

Admins and HR can open **Expense policy** to set limits (for example a maximum amount per claim and when a bill is mandatory) and the **Approval Workflow** (who approves, and above which amount). Click **Save policy** / **Save workflow** to apply.

MONEY

14 Tax & Form 16, Promotions

Tax declaration and Form 16

WHERE	WHO CAN USE IT	WHAT IT IS FOR
My Workspace › Tax & Form 16	Admin, HR Manager, HR Executive, Dept Head, Employee	Declare investments and download the annual tax statement

1. Pick the **financial year** at the top.
2. Under **My declaration** choose the **tax regime**: New (no deductions) or Old (with deductions).
3. For the old regime fill 80C, 80D, rent paid, home-loan interest and other deductions, and add proof notes for HR.
4. Click **Submit declaration**. HR verifies it; a verified declaration is locked.
5. Click **Download Form 16 statement** to print or save the annual statement.

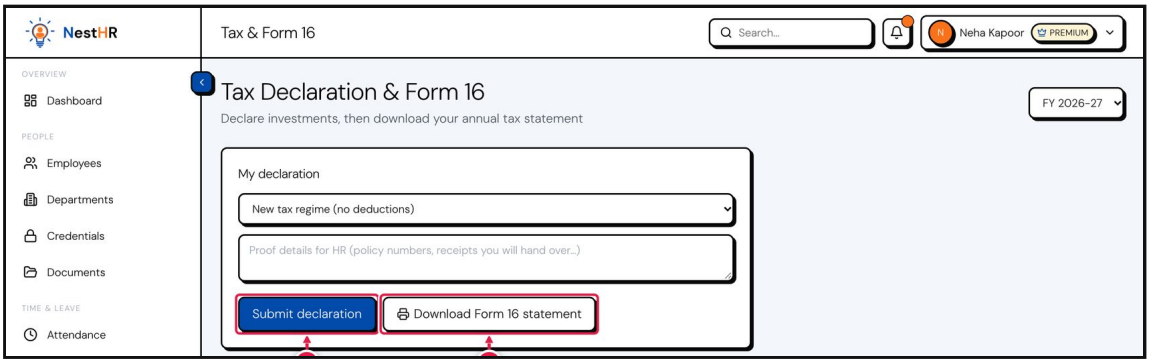


Figure 23. Tax Declaration & Form 16.

1. **Submit declaration**.
2. **Download Form 16 statement**.

HR users also see the list of employee declarations with **Verify**, **Reject** (with a reason), **Reopen** and a Form 16 button for each person.

> **NOTE**
> This statement is built from your payroll records. It is not the official TRACES Form 16 Part A, which comes from the government portal.

Promotions and salary revisions

WHERE	WHO CAN USE IT	WHAT IT IS FOR
Finance & HR › Promotions	Admin, HR Manager	Record raises and promotions with a history

1. Click to add a revision and search the **Employee**.
2. Enter the **New salary (per month)**, the **Reason**, an optional **New designation**, the **Effective from** date and internal **Remarks** that only Admin and HR can see.
3. Save. The employee's salary and designation update, and the page shows total and average raise.

The page has two views: **Monthly report** (raises given this month) and **All revisions** (the full history).

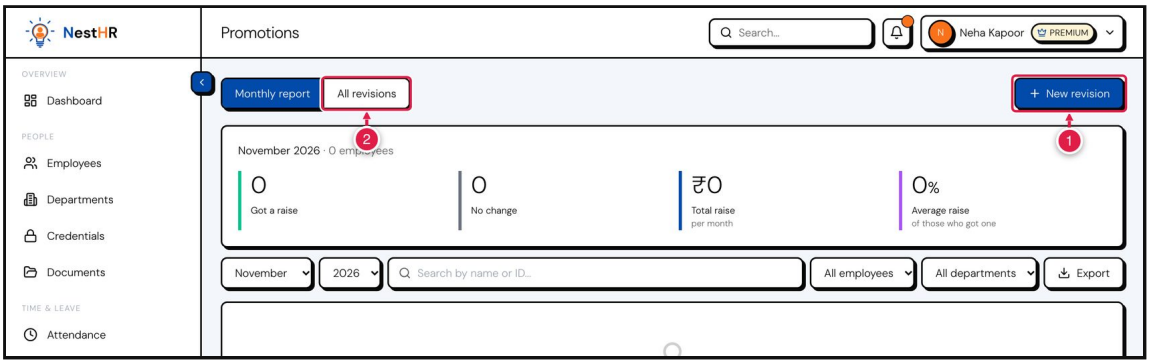


Figure 24. Promotions.

1. **New revision**: record a raise or promotion.
2. **All revisions**: the history.

WORK & GROWTH

15 Tasks & Announcements

Tasks

WHERE	WHO CAN USE IT	WHAT IT IS FOR
My Workspace › Tasks	Admin, HR Manager, HR Executive, Dept Head, Employee	Assign work and track it to completion

1. Click **Assign Task**.
2. Enter the **Title**, choose **Assign To** (compulsory), set **Priority**, **Due Date** and a description.
3. Confirm. The assignee gets it in their task list.

- Switch between **Kanban**, **Table**, **List** and **Timeline** views.
- Status moves from **Pending** to **In Progress** to **Completed**. Update it on the board or inside the task.
- Open a task to add **comments** and keep the discussion in one place.

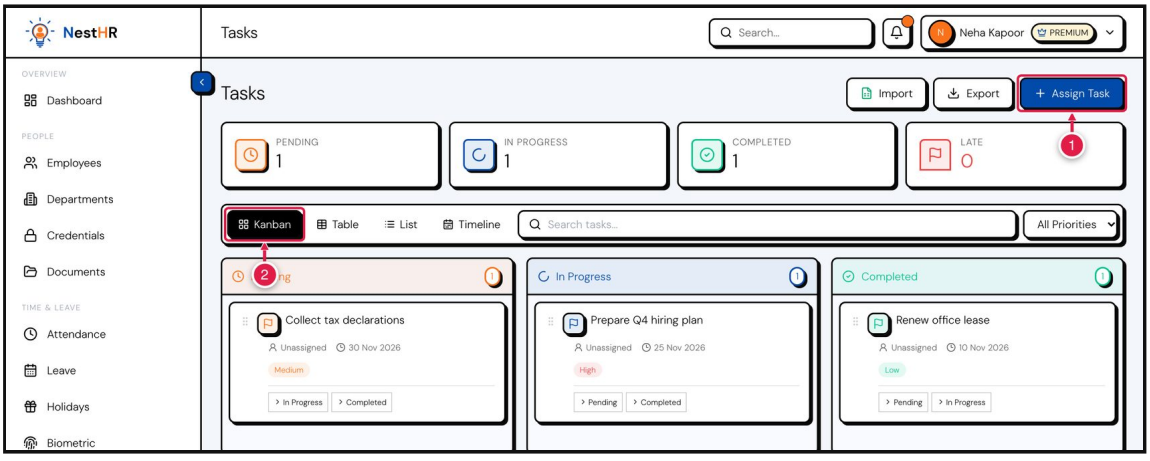


Figure 25. Tasks as a Kanban board.

1. **Assign Task**.
2. **Views**: Kanban, Table, List, Timeline.

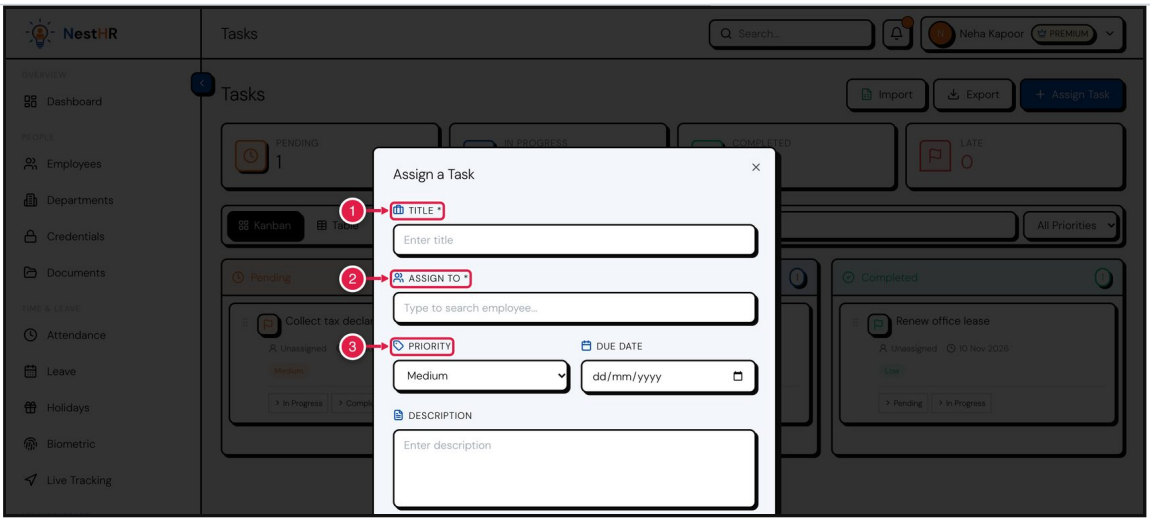


Figure 26. The Assign a Task form.

1. **Title**.
2. **Assign To**.
3. **Priority**.

Announcements

WHERE	WHO CAN USE IT	WHAT IT IS FOR
My Workspace › Announcements	Admin, HR Manager, HR Executive, Dept Head, Employee	Tell the whole company, a department or a role something important

1. Click to create an announcement. Enter a **Title** and **Content** (both compulsory).
2. Choose a **Category** (General, Policy, Urgent, Event or Holiday) and a **Priority**.
3. Choose the **Target Audience**: everyone, selected **Departments** or selected **Roles**.
4. Optionally add a poster image (under 5 MB) and an **Expiry date**, then post.

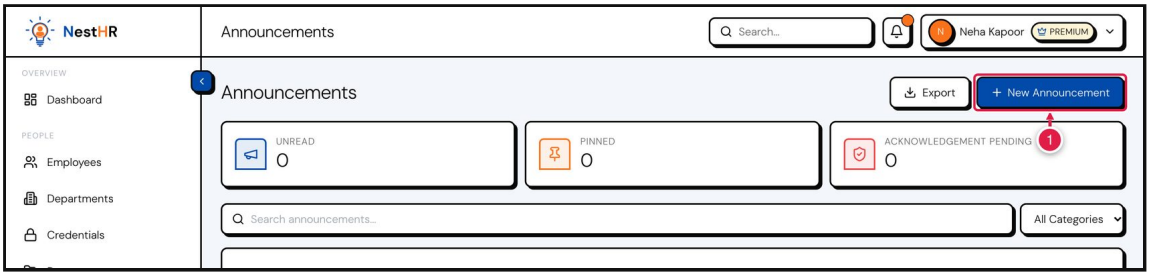


Figure 27. Announcements.

1. **New Announcement**.

> **TIP**
> Employees can **Acknowledge** an announcement so you can see who has read an important policy.

WORK & GROWTH

16 Performance & Exit Management

Performance reviews

WHERE	WHO CAN USE IT	WHAT IT IS FOR
Finance & HR › Performance	Admin, HR Manager, HR Executive, Dept Head	Structured reviews of employees

1. Click to create a review and choose the **Employee**.
2. Enter the **Review Period** (for example Q1 2026), **Year** and **Review Type**.
3. Give an **Overall Rating** from 1 to 5, and write **Strengths** and **Areas of Improvement**.
4. Save. Status moves **Draft** → **In Review** → **Completed**.

A performance report page summarises ratings across the team.

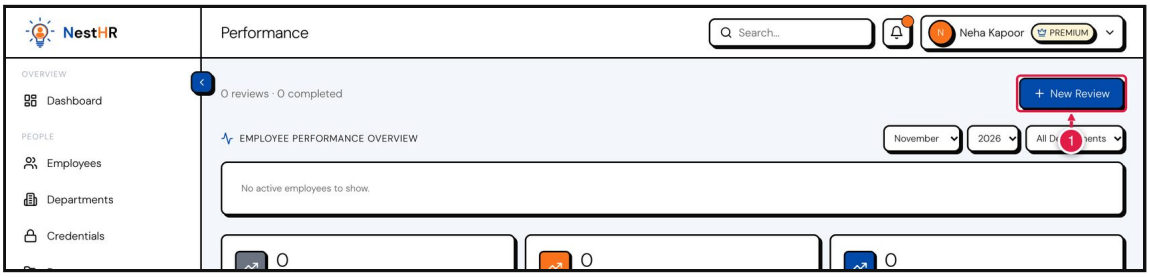


Figure 28. Performance reviews.

1. **New Review**.

Exit management

WHERE	WHO CAN USE IT	WHAT IT IS FOR
Finance & HR › Exit Management	Admin, HR Manager, HR Executive	Manage resignations from notice to clearance

1. Resignation recorded
2. **Notice Period**
3. Clearance of assets and dues
4. **Cleared**
5. **Completed**

1. Click to initiate an exit and choose the **Employee**.

2. Enter the **Resignation Date**, **Last Working Day** and **Reason**, plus notes.
3. Move the record through **Pending**, **Notice Period**, **Cleared** and **Completed** as work is done.
4. Use the filter tabs to see all exits or only one stage.



Figure 29. Exit Management. Use the stage buttons at the top to filter.

1. **Initiate Exit**.

> **IMPORTANT**
> Complete the exit only after final salary is settled. Check **Loans & Advances** for money still owed by the employee.

WORK & GROWTH

Reports

17

WHERE	WHO CAN USE IT	WHAT IT IS FOR
System › Reports	Admin, HR Manager, HR Executive	Analytics and printable reports

The page has two views, chosen at the top right: **All Reports** and **Analytics**.

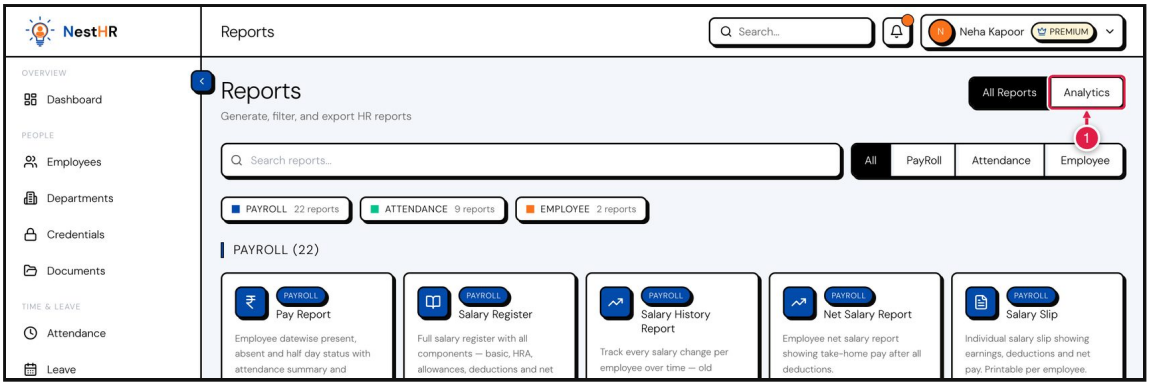


Figure 30. The Reports page in the All Reports view.

1. **Analytics**: switch to charts and summaries.
2. **Generate**: create that report.

All Reports

Report cards are grouped as **PayRoll**, **Attendance** and **Employee**. Use the tabs or the search box to find one. Examples: Pay Report, Salary Register, Salary History Report, Net Salary Report, Salary Slip, PF Register, ESIC Register, Bank Upload Report, Absent/Leave Summary, Late Coming Summary, Loan Report and Designation Summary.

1. Find the report and click **Generate**.
2. Choose the **month**, **department** or **employee** if asked.
3. Review on screen, then **Print** or **Export** (Excel/PDF).

Analytics

Tab	What you learn
Headcount	Total active, male/female, people by department.
Attendance	Present, late, absent and on-leave trends for the month.
Salary	Total gross, net and deductions.

Tab	What you learn
PF / ESI	PF and ESI contributions and TDS collected.

ADMINISTRATION

18 Manage: Shifts, Salary Heads & More

WHERE	WHO CAN USE IT	WHAT IT IS FOR
System › Manage	Admin, HR Manager	Master lists that other pages use

Set these up **before** adding employees. Open **Manage** and choose a tile.

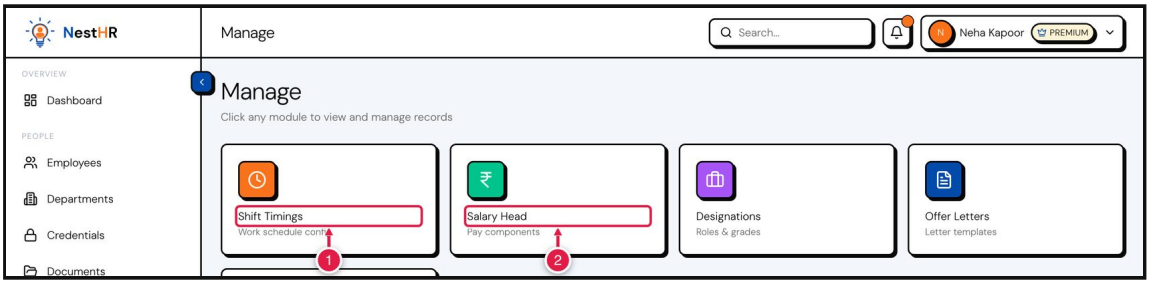


Figure 31. The Manage page: click a tile to open it.

1. **Shift Timings**.
2. **Salary Head**.
3. **User Roles**.

Shift Timings

Create shifts such as **Morning** or **General** with **start time**, **end time**, **break minutes** and the hour after which **overtime** starts. Late marking and overtime follow the employee's shift.

Salary Head (salary components)

Define earnings and deductions such as HRA, medical allowance or special allowance. Each component has a **type** and a **calculation** (a fixed amount or a percentage), and you can mark whether it is **taxable**.

Designations

The job titles your company uses (Senior Developer, Accountant...), optionally with a **grade**. Employees pick from this list.

Offer Letters

Write reusable letter templates. Give each a **name**, the **role** it is for (or All) and the **body** text with placeholders. The page shows how many times each template has been used.

User Roles

A read-only table showing what each role can see: Dashboard, Employee, Salary, Reports, Manage and Settings, each marked Full, Partial, Read, Self or None.

Role	Dashboard	Employee	Salary	Reports	Manage	Settings
Super Admin	Full	Full	Full	Full	Full	Full
HR Manager	Full	Full	Full	Read	Partial	Partial
HR Executive	Read	Full	Read	Read	None	None
Dept Head	Read	Read	None	None	None	None
Employee	Self	Self	Self	None	None	None

ADMINISTRATION

Settings

19

WHERE	WHO CAN USE IT	WHAT IT IS FOR
System › Settings	Admin, HR Manager	Company profile and system-wide options

Tab	What it holds
General Info	Company name, address, GST and PAN, contact details and the **company logo** (you can crop it as you upload).
Bank Details	The company bank account used for salary files and cheques.
ID Card Designer	Design the employee ID card layout.
WhatsApp	Which messages go out on WhatsApp: check-in/out alerts, leave and loan alerts, leave approved/rejected, salary credited, biometric punches.
Salary Mode	How salary is calculated, including the **pay period** and the day it starts.
Punch Settings	Rules for punching, such as allowing self-service punch.
Employee App	What employees may do: view salary slip, attendance and pay history, apply for leave, see the holiday list and report a missed punch.
System / Preferences	Time zone, currency and display options.
Permissions	Switch features on or off for each role.
Account Security	Two-factor authentication and password.
WhatsApp Verification	Verify your company phone number with a code sent on WhatsApp.

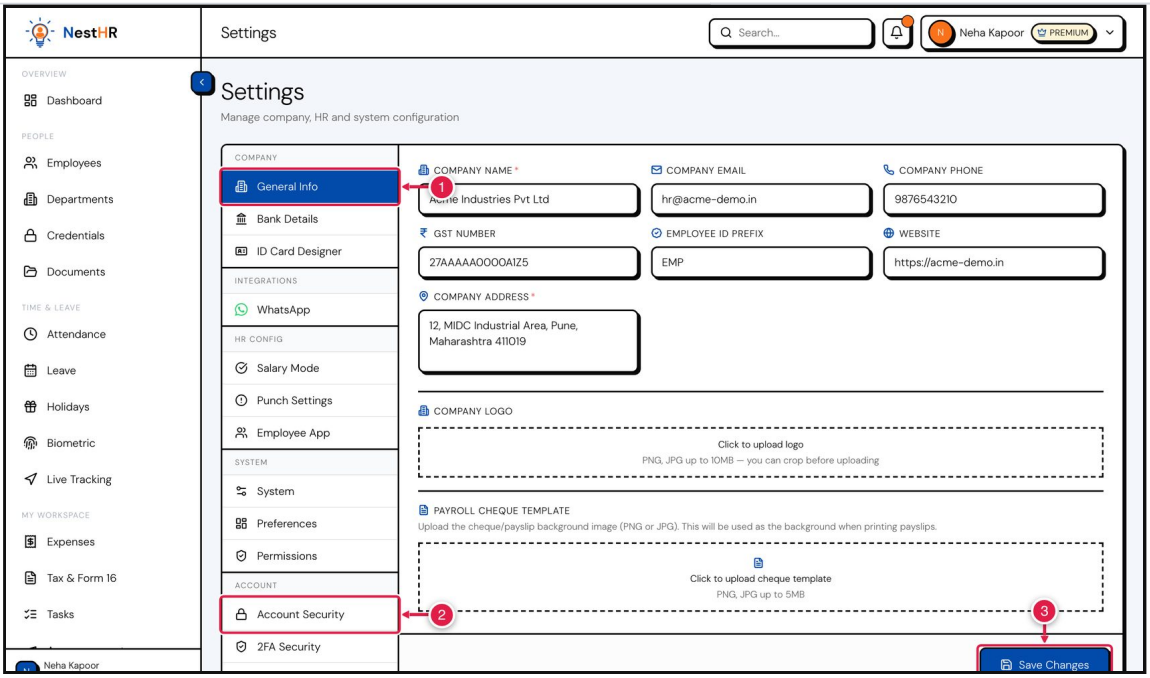


Figure 32. Settings.

1. **General Info** and the other tabs on the left.
2. **Account Security**: two-factor authentication.
3. **Save Changes**: always click this.

Upload your logo

1. Open **Settings › General Info** and choose **Click to upload logo**.
2. Drag the box to select the area, then **Crop & Upload**.
3. Optional: set the **logo position on the cheque** (X, Y and width) and upload a **payroll cheque template**. Save and print a test payslip to fine-tune.

> **IMPORTANT**
> Always click **Save settings** at the bottom and confirm. Leaving the page without saving discards your changes.

ADMINISTRATION

20 Billing, Credits, Audit Log, Trash & Support

Billing

WHERE	WHO CAN USE IT	WHAT IT IS FOR
System › Billing	Admin	Your plan and subscription

See your **plan**, **employees used against the plan limit** and **days remaining**. Upgrade or renew here; invoices are listed on the same page. Adding employees beyond the plan limit needs a larger plan.

WhatsApp credits

WhatsApp messages (alerts, payslips) use credits. The Credits page shows your **balance** and a history: **Charged**, **Not sent**, **Refunds**, **Top-ups** and **Bonus**. Use the top-up option to add credits.

Audit Log

WHERE	WHO CAN USE IT	WHAT IT IS FOR
System › Audit Log	Admin HR Manager	A permanent record of who did what and when

The Audit Log has two tabs. **Attendance & Logins** shows check-ins and check-outs and staff logins (filter by Everything, Check in / out or Staff logins, and by date range). **Change history** shows changes made to records. Use it when you need to answer “who changed this?”.

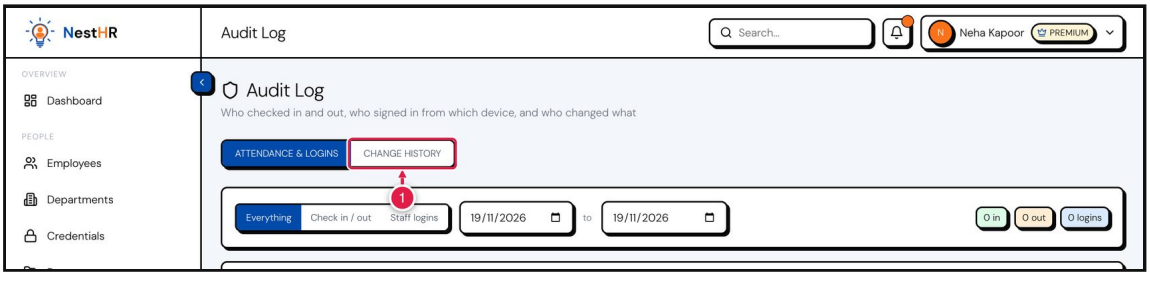


Figure 33. The Audit Log.

1. **Change history**: who changed what. The other tab shows attendance and logins.

Trash

WHERE	WHO CAN USE IT	WHAT IT IS FOR
System › Trash	Admin, HR Manager, HR Executive	Recover things that were deleted

1. Open **Trash** and find the item.
2. Choose **Restore** to bring it back, or **Permanently delete** to remove it for good (this cannot be undone).

Support

WHERE	WHO CAN USE IT	WHAT IT IS FOR
System › Support	Admin, HR Manager, HR Executive, Dept Head, Employee	Get help from the NestHR team

1. Click to raise a ticket and choose the **category** (Attendance, Leave, Payroll, Employees, Biometric, Billing, Reports and more).
2. Set the **priority** (Low, Medium, High or Critical), write the subject and your message, and submit.
3. Follow replies inside the ticket. Statuses are **Open**, **In Progress**, **Resolved** and **Closed**. Close the ticket once solved.



Figure 34. The Support page.

1. **New Ticket**: describe the problem.

EMPLOYEE GUIDE

For Employees: Self-Service

21

Everything a staff member can do on their own.

WHERE	WHO CAN USE IT	WHAT IT IS FOR
Overview › My Dashboard	Employee	Your attendance, leave, salary and documents

Tab in My Dashboard	What you do
Overview	See your monthly CTC, joining date, present and absent days and attendance %. Update your photo.
Attendance	View your calendar and punch history.
Leaves	Request leave and track its status.
Payroll	View and print payslips and pay history.
Growth	See raises and promotions.
Documents	Upload and view your documents.
Assets	Items (laptop, phone) assigned to you.
Settings	Edit your profile and change your password.

Common jobs

Apply for leave

1. Open **Leaves** (or **Leave** in the sidebar) and click Apply.
2. Choose type and dates; use 0.5 days for a half day. Attach a document if asked.
3. Submit and watch the status change from Pending to Approved or Rejected.

See your salary slip

1. Open **My Payroll**.
2. Pick the month and open the slip; use Print to save a PDF.

Ask for a loan or advance

1. Open **My Loans** and send a request with amount, months and reason.

2 HR approves or rejects it. Approved EMIs are deducted from salary automatically.

Other pages for you

- **My Report**: your attendance and salary summary for a period.
- **Expenses**: submit bills and track reimbursement.
- **Tax & Form 16**: declare investments and download your statement.
- **Tasks** and **Announcements**: work given to you and company notices.
- **Support**: contact the NestHR team.

> **TIP**
> If your punch is missing, tell HR the date and time. They can correct it in **Attendance**. A late arrival shown as **Pending approval** is waiting for HR; nothing is deducted until it is decided.

MOBILE APP

22 The Mobile App: Getting Around

The NestHR mobile app (iPhone and Android) works with the same account as the website. Everything you do in one shows up in the other.

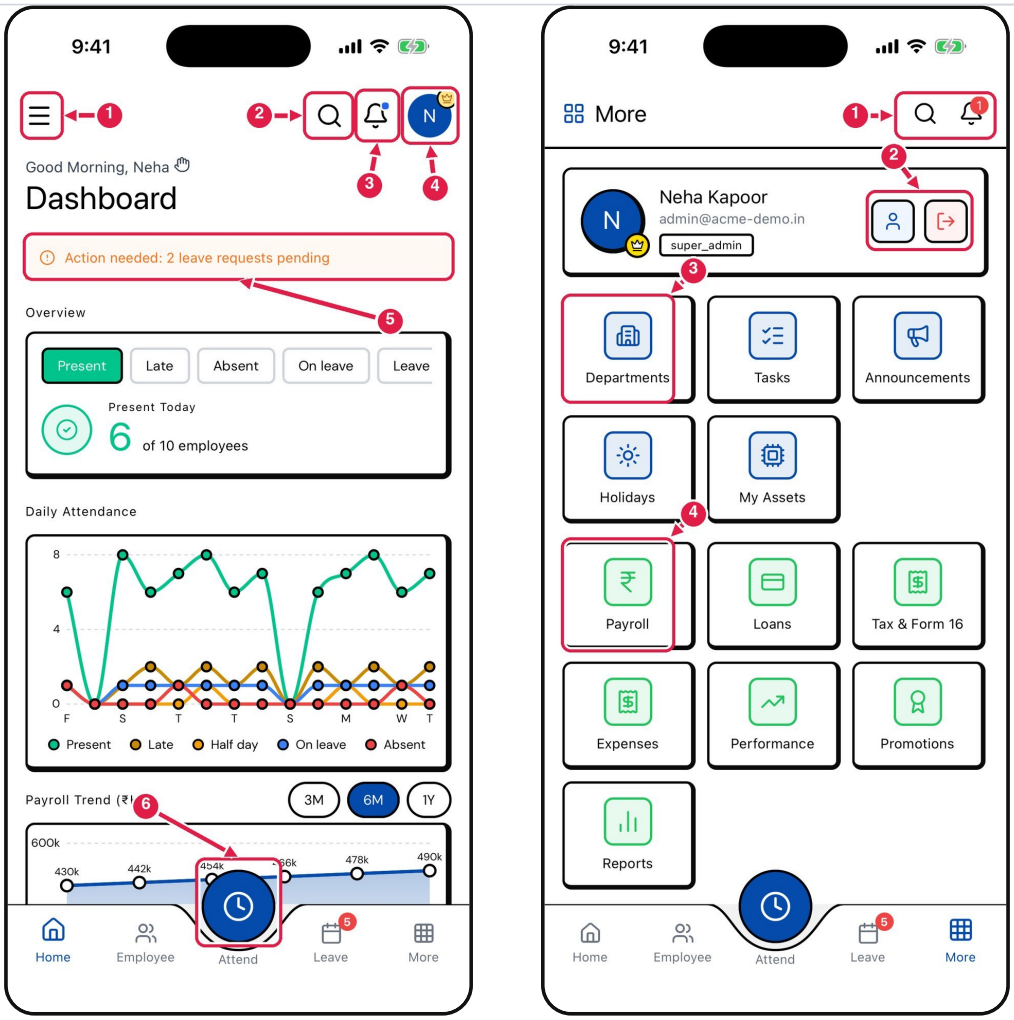
WHERE	WHO CAN USE IT	WHAT IT IS FOR
The NestHR app on your phone	Everyone; menus follow your role	Do daily HR work on the go: attendance, leave, approvals, payslips and more

Sign in

Open the app and sign in with the same **email and password** you use on the website. If two-factor authentication is on, enter the 6-digit code from your authenticator app. Allow location and camera access when asked; they are needed for selfie and location punches.

The bottom bar

Tab	What it opens
Home	The dashboard: today's attendance, pending work, charts and payroll trend.
Employee	The employee list (management roles).
Attend (round button)	The quick way to mark attendance.
Leave	Leave requests: apply, approve and track.
More	Every other page: Payroll, Loans, Tasks, Documents, Settings and so on.



1. **Menu**: opens the side menu.
2. **Search** across the app.
3. **Notifications**: the bell shows unread items.
4. **Profile**: your photo; a crown means a paid plan.
5. **Action needed**: pending approvals; tap to open.
6. **Attend**: mark attendance.

1. **Search and notifications**.
2. **Your profile** and the logout button.
3. **Tiles**: tap one to open that page, for example Departments.
4. **Payroll group**: Payroll, Loans, Tax, Expenses, Performance, Promotions and Reports.

Figure 35. Home (left) and More (right).

Tips for using the app

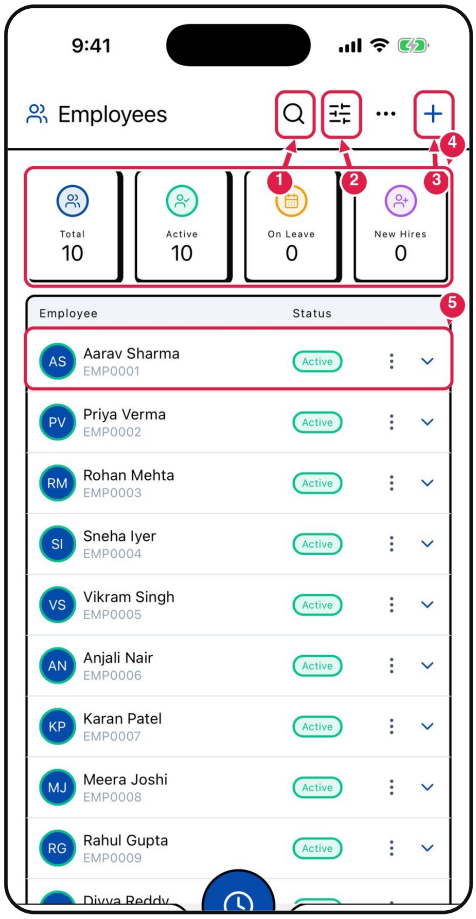
- **Icons at the top right** of each list: search, filter and sort, a **…** menu for import and export, and **+** to add a new record.
- **Pull down** on a list to refresh it.
- Tap the **arrow** at the end of a row to open its details and actions.
- Tap the **back arrow** in the top left to return to the previous page.
- Required fields show a red *; optional fields say **(Optional)**.

MOBILE APP

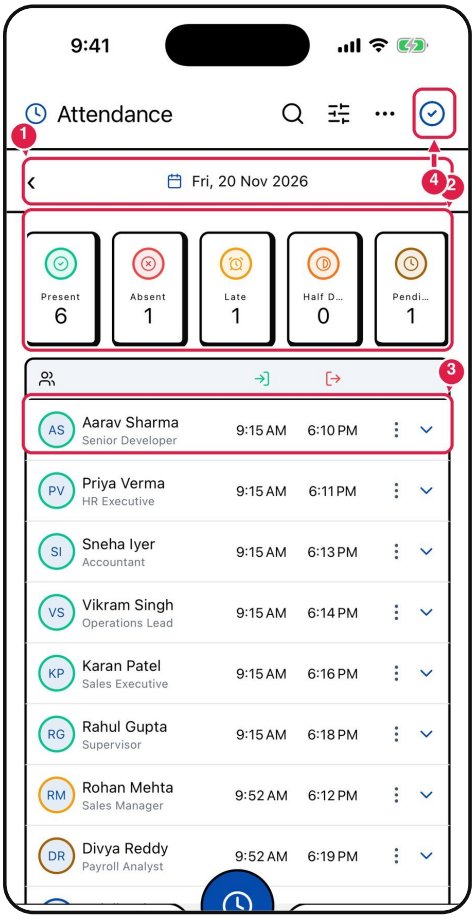
23 Employees & Attendance on Mobile

WHERE	WHO CAN USE IT	WHAT IT IS FOR
Employee tab and Attend tab	Admin, HR Manager, HR Executive, Dept Head	Look up people, add employees and mark attendance from your phone

Employee list



1. **Search** by name or ID.
2. **Filter and sort** the list.
3. **Add** a new employee.
4. **Summary tiles**: total, active, on leave and new hires.
5. **An employee row**: tap the arrow for details, edit, ID card and more.

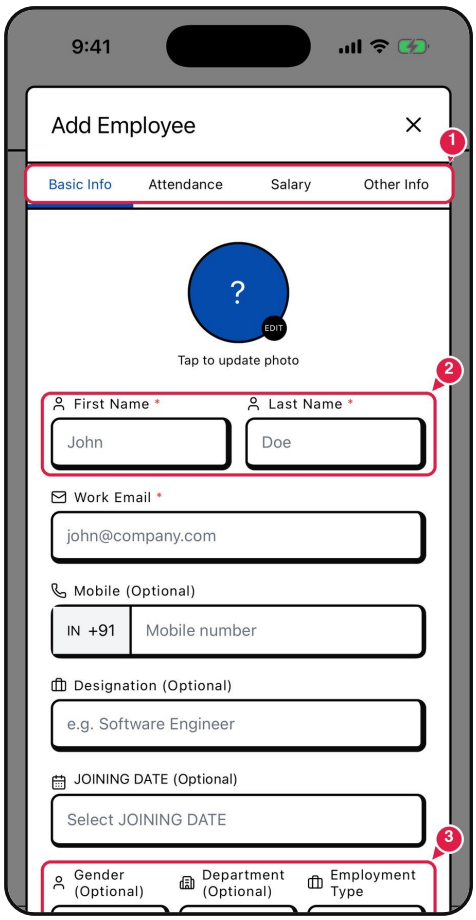


1. **Date bar**: move to the previous or next day.
2. **Status tiles**: present, absent, late, half day and pending approval.
3. **A person's row** shows check-in and check-out times.
4. **Check mark**: bulk actions for the day.

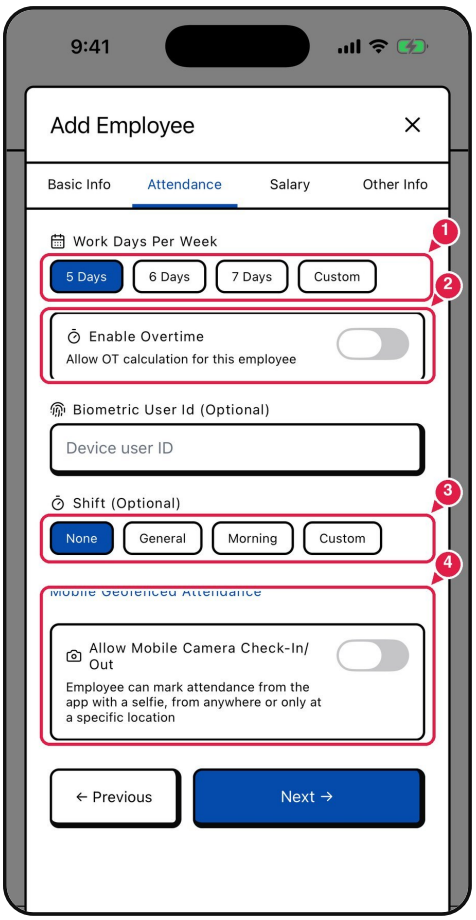
Figure 36. The Employee tab (left) and the Attendance tab (right).

Add an employee

Tap **+** on the Employee tab. The form has four tabs, like the website. Red * marks compulsory fields and **(Optional)** the rest.

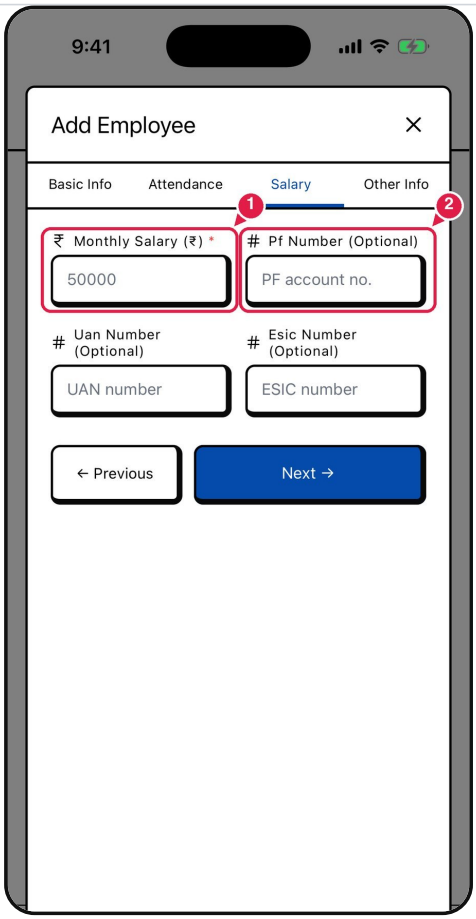


1. **Tabs**: Basic Info, Attendance, Salary, Other Info.
2. **Name and work email** are compulsory.
3. **Gender, Department, Employment Type** sit in one row.

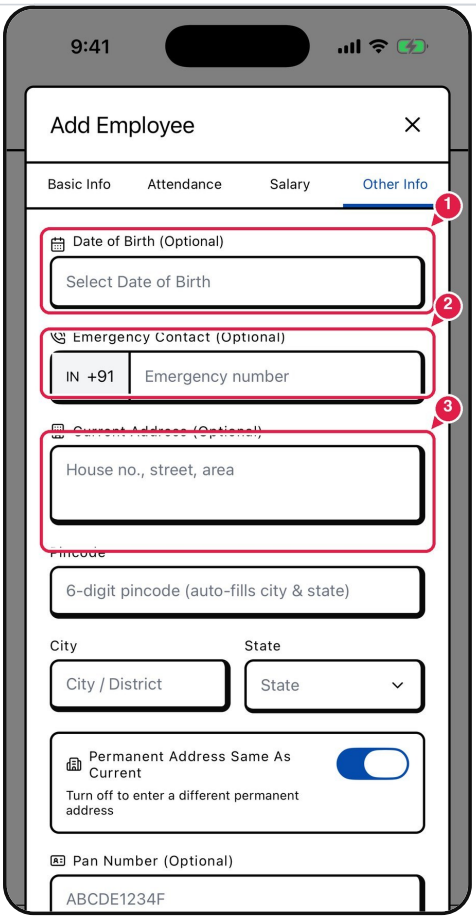


1. **Work days per week**: 5, 6, 7 or **Custom** to pick exact weekdays.
2. **Enable Overtime**: no rate to enter.
3. **Shift**: choose a saved shift or **Custom** for this person only.
4. **Mobile Geofenced Attendance**: allow selfie punches; use **Find office location** to set the place.

Figure 37. Add Employee: Basic Info (left) and Attendance (right).



1. **Monthly Salary** is compulsory for new employees.
2. **PF, UAN and ESIC** numbers are optional.

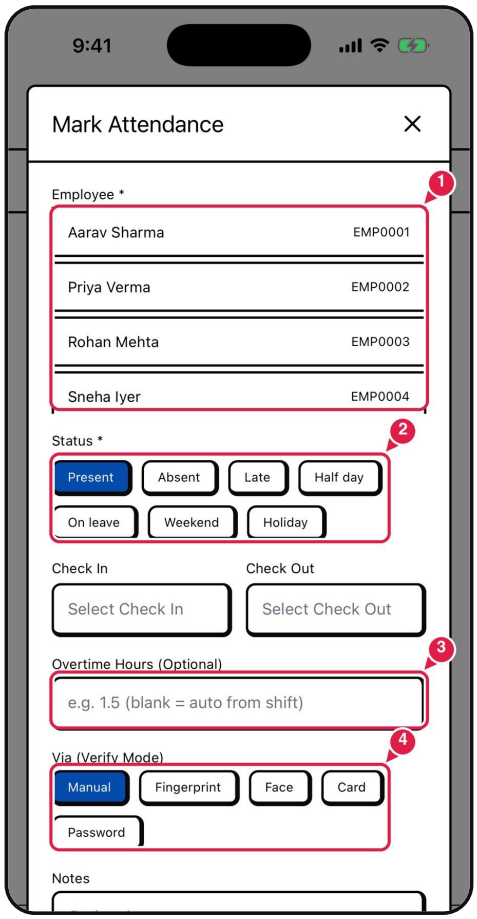


1. **Date of birth** and **emergency contact**.
2. **Addresses**, then PAN and Aadhaar.
3. Further down: family, qualification, previous employer, **bank name picker** and uploads for PAN, Aadhaar and Resume.

Figure 38. Add Employee: Salary (left) and Other Info (right).

> **NOTE**
> The Department Head role and the department it leads can be chosen on the Basic Info tab when you add a person. Marital status "Married" also shows a Marriage Anniversary date.

Mark or correct attendance



1. **Employee**: pick the person.
2. **Status**: Present, Absent, Late, Half day, On leave, Weekend or Holiday.
3. **Overtime Hours**: leave blank to calculate automatically.
4. **Via (Verify Mode)**: Manual, Fingerprint, Face, Card or Password.

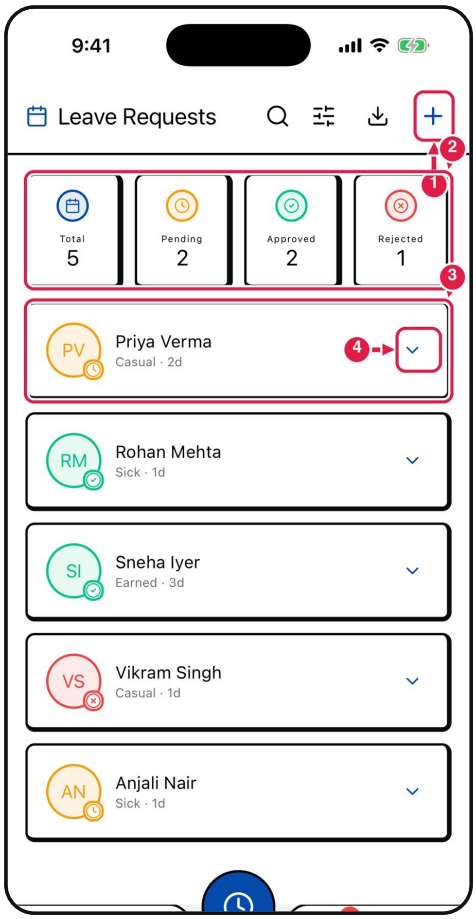
Figure 39. The Mark Attendance form.

MOBILE APP

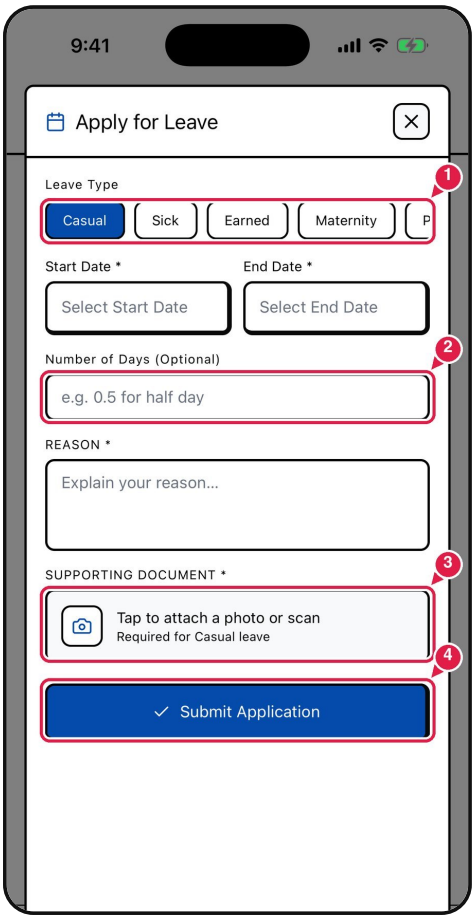
24 Leave, Late Approvals & Holidays on Mobile

WHERE	WHO CAN USE IT	WHAT IT IS FOR
Leave tab; More › Late Approvals; More › Holidays	Admin, HR Manager, HR Executive, Dept Head	Request, approve and review time off

Leave requests



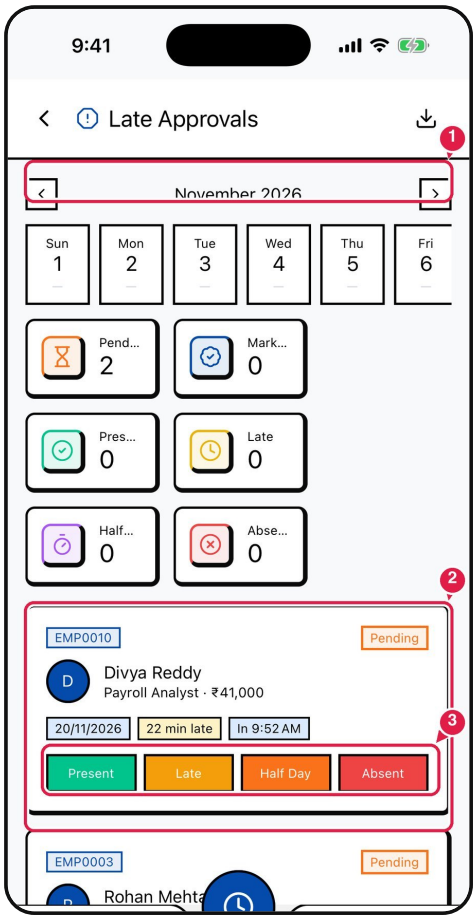
1. **Add**: apply for leave.
2. **Totals**: total, pending, approved and rejected.
3. **A request**: employee, type and days.
4. **Arrow**: opens the reason and the Approve, Reject or Cancel actions.



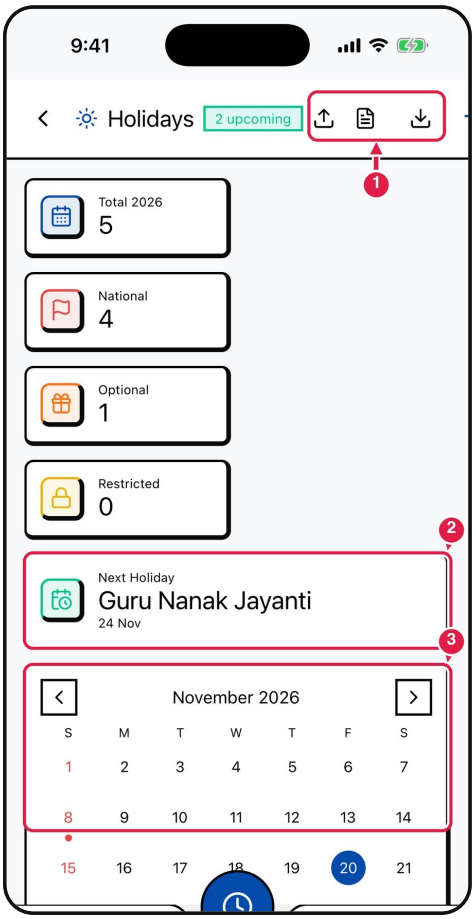
1. **Leave type**: swipe the chips sideways to see them all.
2. **Number of Days**: optional; type 0.5 for a half day.
3. **Supporting document**: required for some types.
4. **Submit Application**.

Figure 40. Leave Requests (left) and the Apply for Leave form (right).

Late Approvals and Holidays



1. **Month and day strip**: choose the day to review.
2. **A pending late arrival** with minutes late.
3. **Present, Late, Half Day, Absent**: tap to decide.



1. **Import, template and export** icons.
2. **Next holiday** at a glance.
3. **Calendar**: tap a date to add or edit a holiday. You can choose All employees, Departments or specific people.

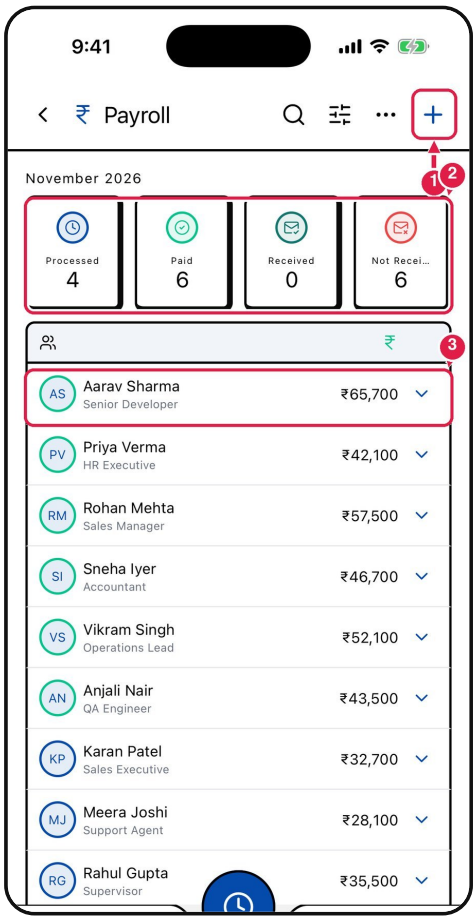
Figure 41. Late Approvals (left) and Holidays (right).

MOBILE APP

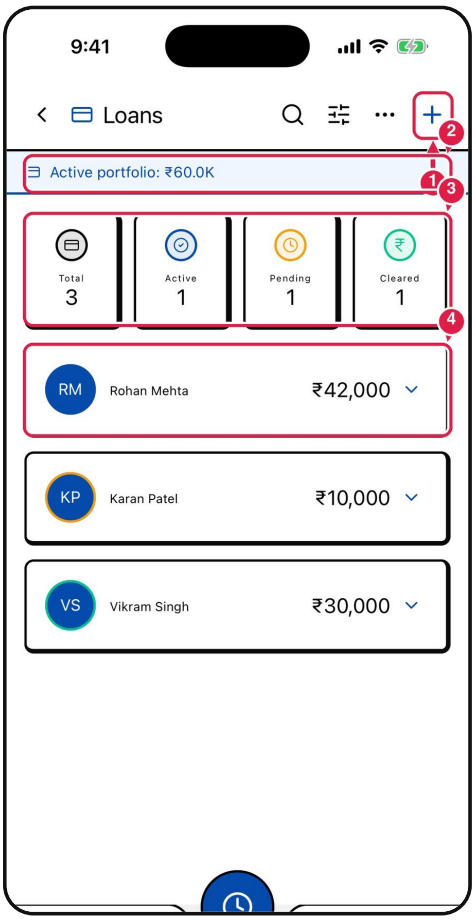
Payroll, Loans & Tax on Mobile

25

WHERE	WHO CAN USE IT	WHAT IT IS FOR
More › Payroll, Loans, Tax & Form 16	Admin, HR Manager	Money tasks; employees see their own slips, loans and tax



1. **Add**: process payroll for the month.
2. **Status tiles**: processed, paid, received and not received.
3. **A person's salary**: tap the arrow to see the payslip, print it or mark it paid.



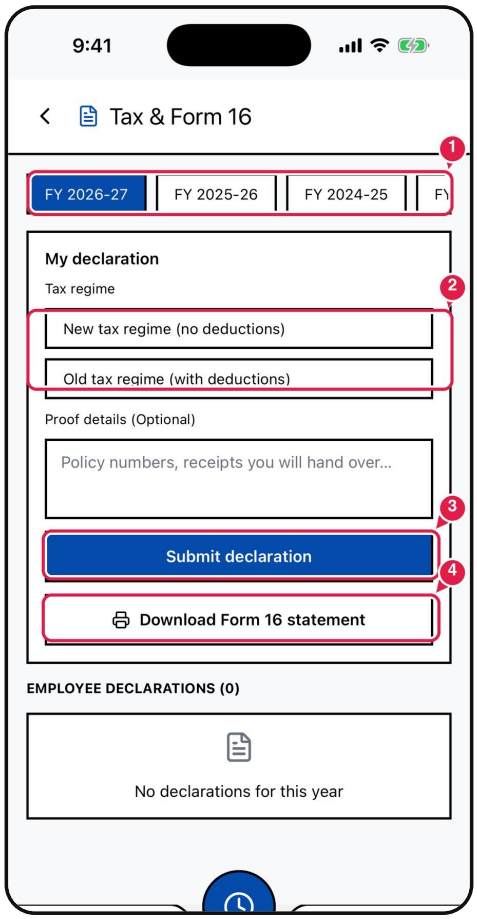
1. **Add**: give a loan or advance (Monthly EMI, Disbursed On and Remarks for admins).
2. **Portfolio banner**: money still lent.
3. **Totals**: total, active, pending and cleared.
4. **A loan**: amount, EMI and status.

Figure 42. Payroll (left) and Loans (right).

TIP

When you tap **Mark as Paid** on a salary, the app asks for the **Mode of Payment**: Bank Transfer, Cash, UPI or Cheque. Choosing **Regenerate** rebuilds unpaid payrolls from the latest attendance.

Tax & Form 16



1. **Financial year**: swipe to see earlier years.
2. **Tax regime**: New or Old. Old shows deduction fields (80C, 80D, rent and more).
3. **Submit declaration**: sends it to HR for verification.
4. **Download Form 16 statement**: opens a printable statement.

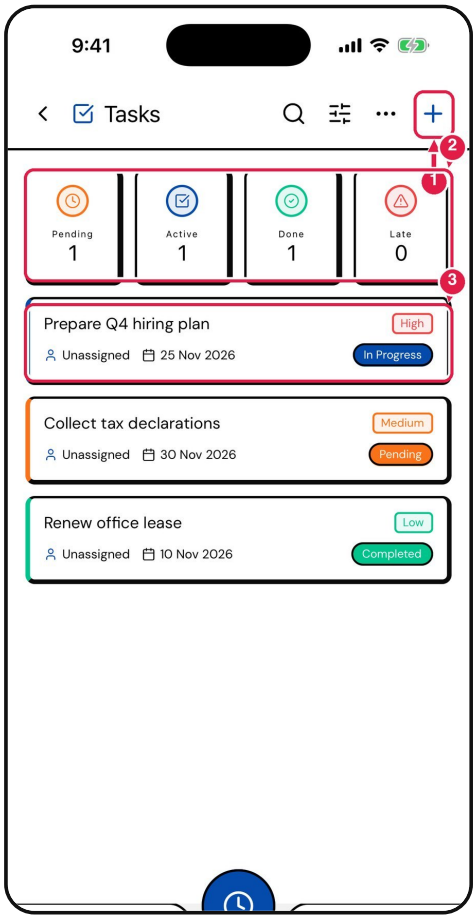
Figure 43. The Tax & Form 16 screen.

MOBILE APP

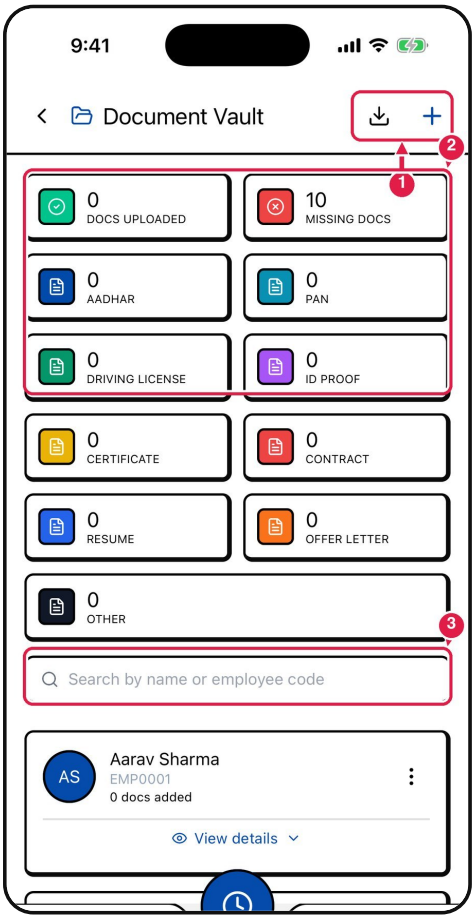
Tasks, Documents & Alerts on Mobile

26

WHERE	WHO CAN USE IT	WHAT IT IS FOR
More › Tasks, Documents, Notifications, Departments	Admin, HR Manager, HR Executive, Dept Head, Employee	Day-to-day work and storage

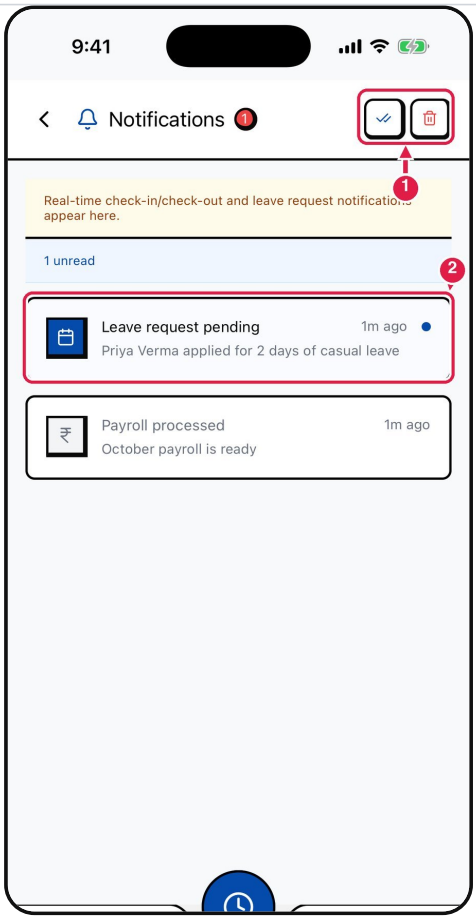


1. **Add**: assign a task.
2. **Counts**: pending, active, done and late.
3. **A task** shows priority, assignee, due date and status.

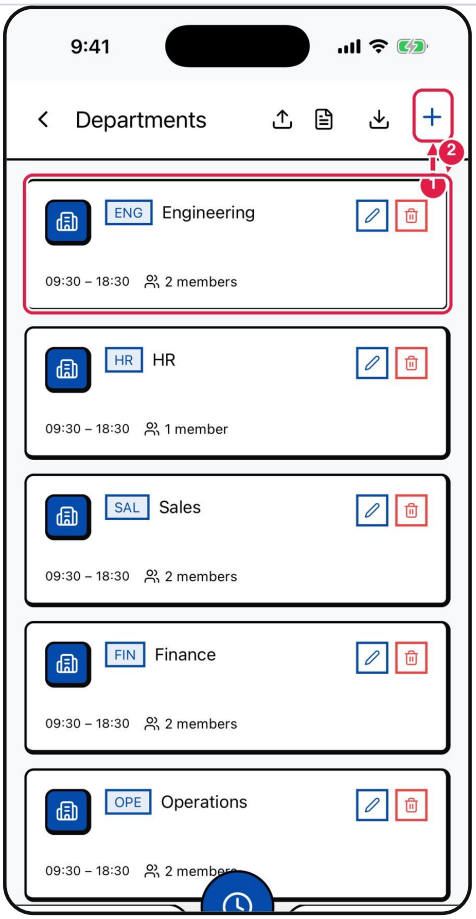


1. **Export and upload** icons.
2. **Counts** per document type, including missing documents.
3. **Search** by name or employee code.

Figure 44. Tasks (left) and Document Vault (right).



1. **Mark all read** and clear.
2. **An alert**: for example a leave request waiting for you. Tap to open it.



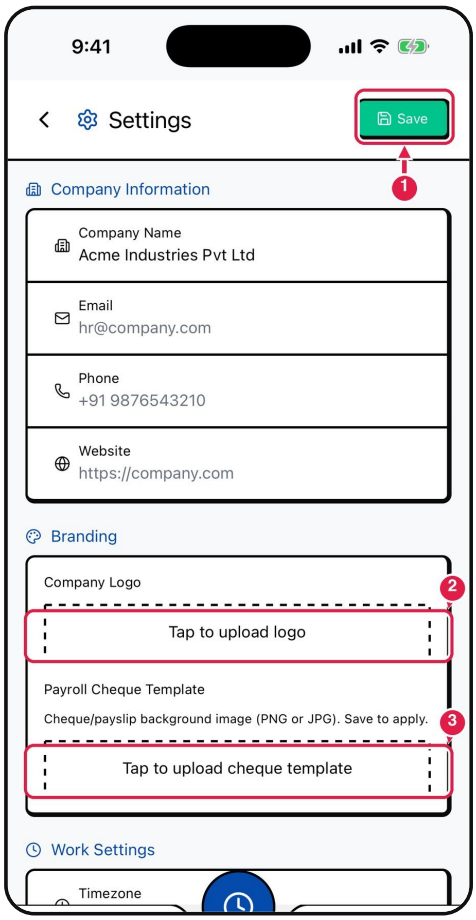
1. **Add** a department.
2. **A department**: code, shift timing and headcount, with edit and delete.

Figure 45. Notifications (left) and Departments (right).

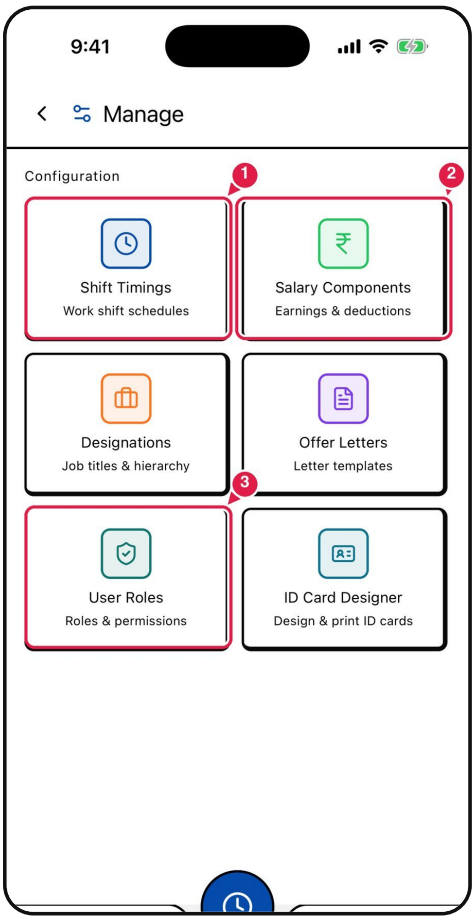
MOBILE APP

27 Settings & Administration on Mobile

WHERE	WHO CAN USE IT	WHAT IT IS FOR
More › Settings, Manage, Biometric Devices, Reports	Admin, HR Manager	Configure the company from your phone

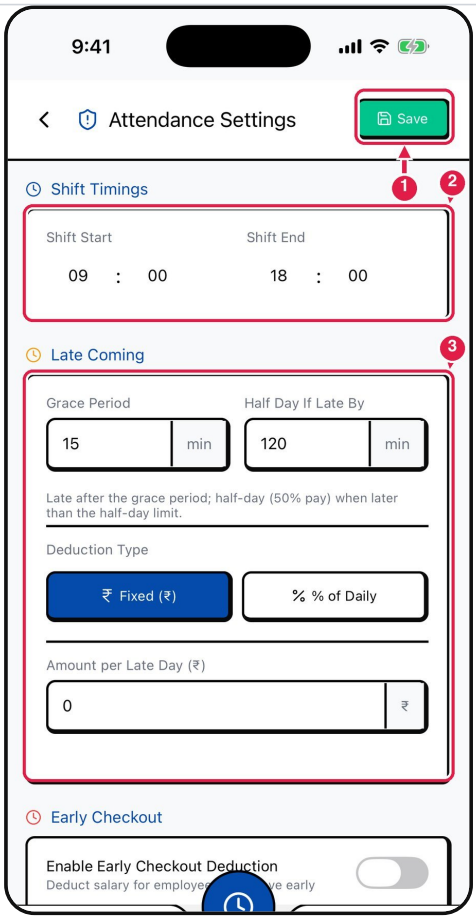


1. **Save**: tap after changing anything.
2. **Company logo**: tap to upload.
3. **Payroll cheque template**: upload your cheque background.

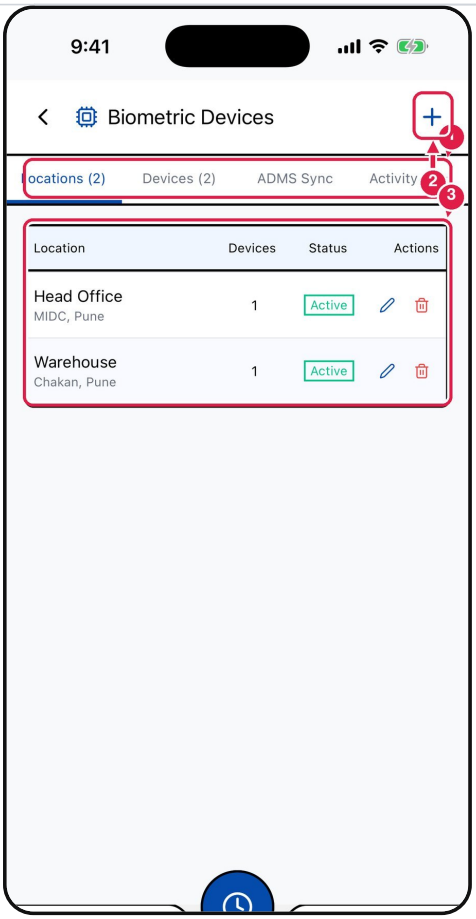


1. **Shift Timings**.
2. **Salary Components**.
3. **User Roles**: a read-only table of what each role can do.

Figure 46. Settings (left) and Manage (right).

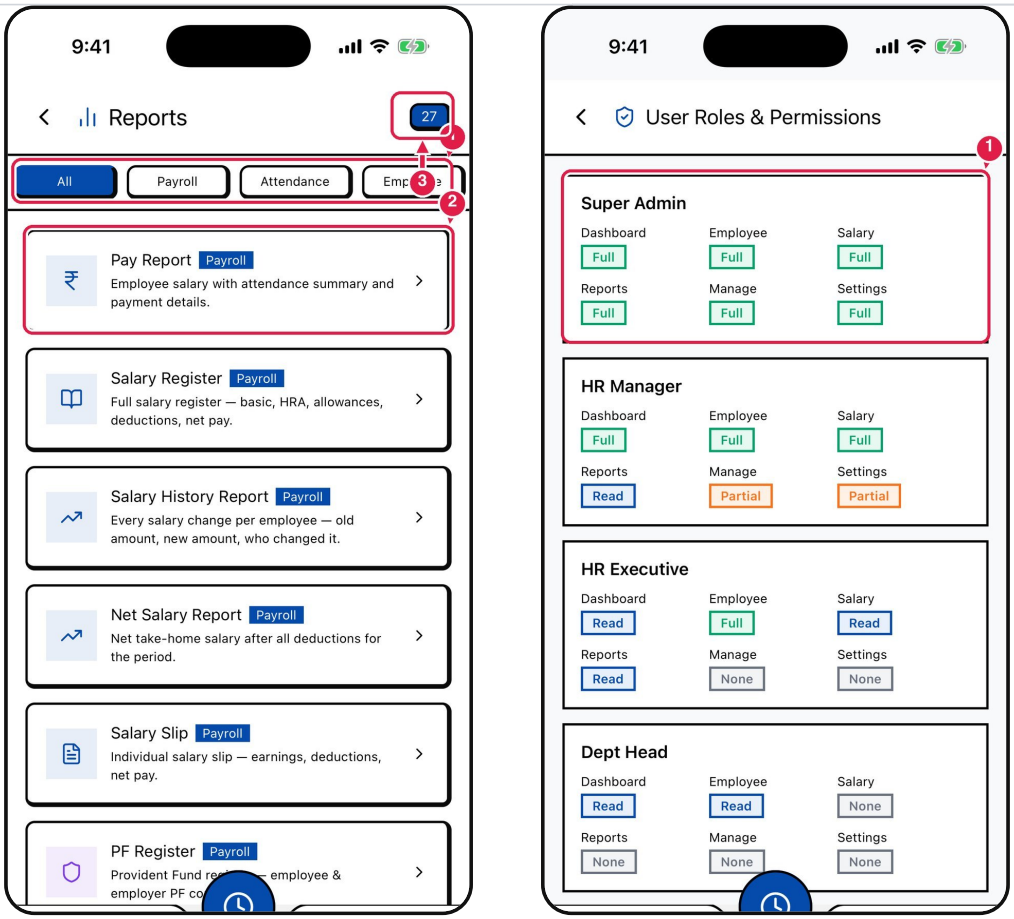


1. **Save**.
2. **Shift timings** for the company.
3. **Late coming rules**: grace period, half-day limit and deduction.



1. **Tabs**: Locations, Devices, ADMS Sync and Activity Logs.
2. **Add** a location or device.
3. **Your locations** with device counts.

Figure 47. Attendance Settings (left) and Biometric Devices (right).



1. **Filters**: All, Payroll, Attendance, Employee.
2. **A report**: tap to choose filters and generate.
3. **Report count**.

1. **Roles and permissions**: Full, Partial, Read, Self or None for Dashboard, Employee, Salary, Reports, Manage and Settings.

Figure 48. Reports (left) and User Roles (right).

> **NOTE**
> Some tasks are easier on the website: building the first set of shifts and salary components, bulk imports, and printing many payslips at once. Both apps always show the same data.

APPENDICES

First-Time Setup Checklist

A

Follow this order. Each step prepares data the next one needs.

#	Do this	Where	Done
1	Complete company details, logo, bank details and pay period	Settings	☐
2	Turn on two-factor authentication for Admin and HR	Settings › Account Security	☐
3	Create shifts	Manage › Shift Timings	☐
4	Create salary components and designations	Manage	☐
5	Create departments	People › Departments	☐
6	Add the holiday calendar for the year	Time & Leave › Holidays	☐
7	Set late and leave allowances	Finance & HR › Attendance Settings	☐
8	Add employees (one by one or by Excel import)	People › Employees	☐
9	Create logins and share them	People › Credentials	☐
10	Connect devices or enable mobile punching; enrol faces	Time & Leave › Biometric	☐
11	Run a test month: check attendance, then Preview payroll	Attendance, Payroll	☐
12	Choose which features employees can use	Settings › Employee App / Permissions	☐

APPENDICES

Monthly HR Calendar

B

When	Task
Every day	Check Dashboard; approve leave; fix missing punches in Attendance.
Every week	Clear Late Approvals; review Tasks; post announcements.
Last 3 days of the month	Close attendance corrections; approve leave and expenses; enter bonuses and penalties; confirm loans.
Month end	Clear Late Approvals; Preview payroll; Process; Regenerate if needed.
After payment	Mark paid with the payment mode; share payslips; export Bank CSV / Tally / Zoho files.
Once a year	Update holidays; refresh allowances; collect tax declarations; run performance reviews; verify Form 16.

APPENDICES

Troubleshooting & FAQ

C

Problem	What to do
An employee cannot log in.	Check **People › Credentials**. Create or reset the password. Confirm the email is correct and the employee is active.
A device punch does not show in Attendance.	The Employee ID on the device must match the NestHR employee ID exactly. Also check the device's DNS and time, and the **Activity Logs** tab.
Someone shows as Pending approval.	They used all free late arrivals. Decide it in **Late Approvals**.
A person is missing from payroll.	They had no attendance records in the pay period, or are not active. The skipped list on Payroll gives the reason.
I changed attendance after processing payroll.	Open the payroll dialog for that employee and choose **Regenerate**. Paid payrolls are not changed.
Face is not recognised.	Open the employee, use **Reset Face** and enrol again in good light, facing the camera.
Late is wrongly marked.	Check the employee's **shift** and the grace time. A wrong shift makes everyone late.
I deleted something by mistake.	Open **Trash** and restore it.
Where can I see who changed a record?	**Audit Log**.
I need more help.	Open **Support** and raise a ticket with the page name and what you expected.

APPENDICES

Glossary

D

Term	Meaning
CTC	Cost to company: the total yearly or monthly cost of an employee.
EMI	Monthly instalment repaid on a loan.
Grace time	Minutes after shift start before a punch counts as late.
Geofence	A circle on the map; mobile punches count only inside it.
ISUP / ADMS	Technical protocols some attendance machines use to send punches.
PF / ESI	Provident Fund and Employees' State Insurance contributions.
TDS	Tax deducted at source from salary.
UAN	Universal Account Number for PF.
Regenerate	Rebuild an unpaid payroll from the latest attendance.
Shift	The working hours of a person, used for late and overtime.
Token	A private part of a device web address that proves it belongs to your company.



Thank you for using NestHR

Need a hand? Open **Support** in the sidebar and raise a ticket.
Include the page name and what you expected to happen.