MpxHR Enterprise

Desktop Human Resource Management System

User & Administrator Guide

Version 4.3

Offline-first HR · Attendance · Payroll · Compliance · Email · Google Sync

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> **How to read this guide.** Menu paths are written like `Masters › Employees` — click the ribbon tab first, then the icon. Items marked NEW were added after version 2.2.

What's New in Version 4.3

This guide covers everything in MpxHR up to version 4.3. The highlights of 4.3 come first, then the earlier 4.x highlights:

Fair loss-of-pay

Salary heads are now reduced by the days an employee was really unpaid. With the **Fixed 26** or **Fixed 30** basis, each unpaid day costs 1/26 or 1/30 of the head, so absences are never hidden. Heads marked non-proportionate stay fixed. (Section 9)

Salary structure on the payslip

The payslip can show each head's standard rate next to the earned amount. Turn it on or off in Settings, Payslip fields. (Section 10)

Roles and permissions

Admin, HR, Payroll and Employee roles are enforced by the program itself, with a Users and Roles screen. (Section 20)

Server and client mode

One computer keeps the data and others connect to it, with a separate login per connection and a live notice when data changes.

Safer payroll runs

An employee whose payroll cannot be generated is listed with the reason instead of being silently left out. Employees with only a position salary now get PF and ESI too.

Earlier in version 4.2

Onboarding

A joining checklist for every new joiner before an employee record exists, a printable joining form, and **Make Employee** in one click. (Section 22)

Joiner Form

Send a link; new joiners fill their details and upload documents from a phone. Choose any question, with checks and file limits, review the answers, then add them. (Section 22)

Reliable backups

Backups now always capture the database the program really uses, are checked after saving, keep the newest N, and restore with a safety copy. (Section 19)

New look for every list

Summary cards, avatars, chips and status pills on Employees, Attendance, Payroll, Payslips, Loans and the masters, plus a redesigned Salary Sheet with a totals row. (Section 4, 9)

Flexible salary structure

Every employee can now have any number of salary heads with their own amounts. Payroll, payslips and reports all follow it. (Section 5.1, 9)

Redesigned payslips + Payslip Designer

New payslip layout with logo, loan details and amount in words, plus a drag-and-drop designer for your own layout. (Section 10)

Email system

Send payslips and letters by email, plus automatic leave-decision and birthday emails. Works with Gmail, Outlook, Zoho, Yahoo, any SMTP server, or a Google account. (Section 15)

Google Sync & Form Builder

Export tables to a Google Sheet, import rows through an approval queue, and build Google Forms that fill several tables at once. (Section 16)

Safer Excel imports

Preview screen with duplicate/date/status checks before anything is saved; correct DD/MM/YYYY dates; no more merging of different employees who share an email. (Section 14)

Bulk payroll edits

Select employees in Net Pay and set or add one salary head for all of them; import the amounts from Excel. (Section 9.3)

Custom Fields & Tables

Add your own fields to forms, or create new tables, with no code change. (Section 17)

Admin tools

DB Viewer, master recovery password, PAN field, application tour, keyboard-shortcut help, Data Security guide. (Sections 18, 20, 21)

Smaller improvements

- **Settings menu** now scrolls, so Custom Fields, Files & Uploads, Security & Users and Module Rights can be reached on a laptop screen; the top-bar Logout button is no longer cut off on narrow windows.
- Google Forms in the Form Builder have **Preview** and **Share** (copy, WhatsApp, email), and a short guided **setup wizard** with a "Check now" button for the one-time Google script update.
- When a window opens over another (Share, Preview), the one underneath is tucked away until you close it.
- Employee and Net Pay rows open full detail with a single click anywhere on the row — no need to tick the checkbox first.
- The Financial Year dropdown now generates itself (current year −4 to +1) and always selects today's year.
- Page changes show a small spinner on the clicked button instead of a full-screen loader.
- Attendance import handles several months in one file and shows a result summary per month.
- Salary Head setup saves reliably (Earning/Deduction type is validated); Basic and Special Allowance columns now import correctly.
- Dropdown/Yes-No custom fields match saved values ignoring case and trailing spaces; out-of-list values show as " (not in list)".
- Payroll now reads the live salary structure, so attendance and salary changes always reflect in Net Pay; company logo appears on payslips downloaded from Net Pay.
- Last name is optional when syncing employees from Google Sheets.
- Photos, signatures and documents: employee-form upload, bulk **Import Files** from a folder, Excel or Google Drive, with admin-set size and file-type limits (Section 14.4).
- **License and trial:** a 14-day free trial (up to 50 employees), then a license key from your vendor. Yearly plans end on a date with a 15-day grace period; a one-time **Lifetime** plan never expires. After that the app switches to view-only mode: you can still view, print and export everything, but cannot add or change records until a new key is entered. Enter keys at `Masters › Settings › License`; a banner under the ribbon shows the trial or expiry status.
- **New look everywhere:** redesigned top bar and ribbon, Dashboard, Analytics (3D bar and ring charts, per-company numbers), Reports Center, Letters, tables with status pills, and modern add/edit popups.
- **Safer sign-in:** show/hide password, Caps Lock warning, “Remember my user name”, and a temporary lock after 5 wrong attempts (30 seconds, doubling up to 15 minutes). Wrong passwords now show a clear message.
- **Clickable inputs after logout:** fixed a problem where text boxes on the login page could not be clicked after logging out.
- Delete and confirmation questions now use an in-app dialog (red button for deletes) instead of the Windows pop-up.
- Attendance screen: clearer toolbar with labelled buttons, employee code and designation under each name, today highlighted, and P/A totals as chips.

- Payslip Designer: the full A4 page now fits on screen and the side panels are tidier.
- Icon tooltips across the app; improved company-data isolation and payroll accuracy fixes.

1. Introduction & Overview

MpxHR Enterprise is a complete, offline-first Desktop HR Management System for small and mid-sized organisations. It runs on a local computer — no internet is needed for day-to-day use — and keeps all company, employee, attendance and payroll data on that machine. Internet is only used by the optional features: Email and Google Sync.

What MpxHR manages

Area	What it covers
Employee Records	Personal, statutory (PAN, Aadhaar, PF, ESI, UAN), bank and salary-structure profiles; custom fields
Attendance & Leave	Daily and monthly attendance, shifts, leave types, holidays, PL/CL credit, Excel import
Payroll	Automatic PF / VPF / ESI / PT / TDS / loan / custom deductions, bulk head updates, challans
Payslips	PDF/Word payslips, bulk export, email delivery, custom layout designer
Compliance	Form 16 certificate, statutory challans, PF/ESI/TDS reports
Loans & Assets	Employee loans with automatic EMI recovery; asset records (syncable with Google Sheets)
Communication NEW	Email payslips and letters; automatic leave and birthday emails
Integrations NEW	Google Sheets sync, Google Form builder
Reporting	Ready-made reports and a custom report builder

> **Multi-company.** One installation can manage several companies and branches. You choose the active company at launch and can switch it any time from the top context bar.

2. Getting Started

2.1 Launching and logging in

1. Double-click the MpxHR icon on the desktop or Start Menu.
2. Enter User Name and Password, then click **Sign In**.

> **Default administrator login:** username **admin**, password **admin123**. Change it immediately after the first login (`Masters › Settings › Security & Users`).

2.2 Selecting a company

After login the Company Selection screen shows quick numbers (Total Employees, Departments, Present Today, Registered Companies), Quick Reports and the company list. Click a row (or **Add** to register a new company) and press **Continue**.

2.3 The main window

Area	Purpose
Context bar (top)	Switch Company, Financial Year (Apr–Mar) and Month. Most screens filter by these, and reload when you change them.
Ribbon tabs	Dashboard, Masters, Attendance, Payroll, Reports, Documents
Ribbon toolbar	Icons for each module of the active tab
Title-bar icons	**Application Tour** (magic wand), **Keyboard Shortcuts**, **User Guide** (this PDF), **Contact Support**, **Logout**
Content area	The active screen — grids, forms and reports

> **First time here?** Click the magic-wand icon for a guided Application Tour of the interface.

2.4 Ribbon map

Tab	Icons
Dashboard	Overview, Analytics
Masters	Employees, Departments, Designations, Branches, Salary Heads, **Payslip Designer** NEW, Categories, Loan Setup, User Deductions, Companies, Data Security, Settings
Attendance	Daily Attn., Monthly Attn., Leave App., Shifts
Payroll	Net Pay, Payslips, Loan Setup
Reports	All Reports
Documents	Letters

3. Dashboard & Analytics

3.1 Overview

- **Recently Viewed Pages** — quick links back to screens used in this session.
- **Request Links** — pending TDS, loan, leave, attendance and reimbursement requests.
- **Bulk Changes Links** — jump into bulk-edit mode for Branch, Designation, Employee Details, Salary Definition, Shift or Category.
- **Utility Links** — Current Running Loans, EMI Calculator, Section 80C quick reference, Allowance & Deduction shortcuts.

3.2 Analytics

`Dashboard › Analytics` shows four live charts: Employment Status, Attendance Overview (current month), Salary Distribution by Department and Hiring Growth (last 6 months). Click **Refresh Data** to reload.

4. Employees, Departments, Designations, Branches

4.1 Employees

`Masters › Employees` is the central record for every staff member. **Click anywhere on a row to open the full detail** NEW.

Adding an employee

1. Click **New**.
2. Fill personal details (name, DOB, gender, contact, address), employment details (department, designation, date of joining, status), salary structure and statutory numbers: **PAN** NEW, Aadhaar, PF, ESI, UAN.
3. Fill any **custom fields** you have defined (Section 17).
4. Add a **photo** and **signature** with the Browse buttons beside the form. After the first Save, the **Documents** box lets you upload Aadhaar, PAN, certificates and so on (Section 14.4).
5. Click **Save** (`Ctrl` + `S`).

> **Salary structure.** The salary structure is no longer limited to six fixed columns. It lists whichever Salary Heads you define in `Masters › Salary Heads`, each with its own amount per employee.

Editing, selecting, deleting

- Tick one or more checkboxes (or the header checkbox to select all). **Edit** needs exactly one selected employee.
- **Delete** works on many employees at once and removes their attendance, payroll, leave and document history. This cannot be undone — take a backup first.
- **Simultaneous Edit** — inline bulk editing of many rows.
- **Import / Export / Template** — Excel in and out (Section 14). Search plus Department/Branch filters narrow the grid.

4.2 Departments

`Masters › Departments` — simple list used for grouping and reporting everywhere.

4.3 Designations

`Masters › Designations` — job titles with a default base salary, **LWF Category** (Employee / Supervisor / Manager), **Probation Period** (days) and **Deduct PT** (whether Professional Tax applies).

4.4 Branches

`Masters › Branches` — office locations linked to a company; employees and attendance can be filtered by branch.

5. Salary Heads, Categories, Loans, Deductions

5.1 Salary Heads UPDATED

`Masters › Salary Heads` defines every pay component. The grid shows Description, Short Code, Type, Form 16 Purpose and flags for PF, ESI, Bonus, OT and Active.

1. Click **Add New**, enter the description (for example *House Rent Allowance*) and short code.
2. Choose **Type**: **Earning** or **Deduction** (required).
3. Tick whether the head counts toward PF, ESI, Bonus and Overtime, choose its Form 16 purpose, and keep it Active.
4. Save. The head is immediately available in each employee's salary structure, Net Pay, payslips and reports.

Use **Modify** to change a head and **Delete** to remove one. Existing payroll history keeps working, because older payroll data is read through the same dynamic structure.

5.2 Employee Categories

`Masters › Categories` — free-form groups (Staff, Worker, Management) for classification and bulk reporting.

5.3 Loan Setup

`Masters › Loan Setup` (also under the Payroll tab) — record a loan or advance once:

1. Click **New**; pick the employee, loan type, principal, monthly EMI and start date.
2. Save. The loan shows as Active with a running balance.

Each payroll run deducts the active EMI and reduces the balance. At zero the loan closes automatically; use **Mark Closed** to close it manually. Loan details also appear on the payslip.

5.4 User Defined Deductions

`Masters › User Deductions` — company-wide custom deductions (uniform fee, canteen). Each is a Fixed amount or a Percentage of Gross, and applies to every payroll run while Active.

6. Company & Branch Setup

`Masters › Companies` holds each company's legal and statutory identity across five tabs:

Tab	Contents
General	Name, code, establishment date, business type, address, logo (the logo prints on payslips)
Statutory	PAN, TAN, GSTIN, CIN, Professional Tax and LWF registration, Tax Circle/CIT
PF / ESI	PF code, establishment ID, signatory; ESI code, local office, signatory
Bank	Company bank account for payslips and bank advice
Management	Two Directors / Authorised Signatories

Use **Simultaneous Edit** to correct several companies at once. A newly added company appears in the top context-bar dropdown immediately, without restarting.

7. Attendance & Shifts

7.1 Daily Attendance

`Attendance › Daily Attn.` — check employees in/out for today or correct a day's punch times and status.

7.2 Monthly Attendance

`Attendance › Monthly Attn.` shows every employee against every day of the month as a colour-coded grid. Click a cell to change it.

Code	Meaning
P	Present
A	Absent
L	Leave
WO	Weekly Off
HD	Half Day
PL	Paid Leave
HL	Holiday

The PL and RH counters in the header show the remaining Paid Leave and Restricted Holiday balances.

Bulk tools

- **Mark Multiple** — one status for several employees over a date range.
- **XLS / Tpl / Imp** — export the grid, download a fill-in template, or import from Excel. Imports are validated first (Section 14) and can contain **several months in one file** NEW, with a per-month result summary.
- **Credit Leaves** (coins icon) — credits monthly PL/CL to employees who meet tenure and minimum-attendance rules.
- **Auto-Fill** (magic wand) — fills remaining blank days as Present before month-end payroll.
- **Restore Default** — return a day's cell to its default status.

7.3 Shifts

`Attendance › Shifts` — define shift start/end and grace period, and assign employees through the roster.

8. Leave Management

`Attendance › Leave App.`

8.1 Applying and approving

Select the employee (administrators only; employees see only their own record), leave type, date range and reason, then submit. An administrator **Approves** or **Rejects**. NEW If automatic emails are enabled (Section 15), the employee is emailed the decision.

8.2 Leave types & holidays

- **Leave Types** — Casual, Sick, Paid Leave etc., each with a yearly maximum and a colour.
- **Holiday Calendar** — Public, National or Restricted (RH). Restricted holidays feed the RH balance on the Attendance screen.

8.3 Leave balances

Running balance per leave type is tracked automatically and visible on the Leave screen and employee profile.

9. Payroll Processing

9.1 Payroll months

Each Financial Year / Month has an Open or Closed status. Close a month once payroll is final to prevent accidental changes.

9.2 Generating payroll — Net Pay

`Payroll › Net Pay` shows every active employee's salary sheet, grouped into Employee Details, Income and Deductions. **Click a row to open its full detail** NEW.

1. Confirm Company / Financial Year / Month in the context bar.
2. Click the refresh icon to (re)calculate from attendance and the salary structure.
3. Review or adjust cells if required.
4. Click **Save** to commit the payroll for the period.

What is deducted automatically

Deduction	Source
PF	Employee's PF rate on the PF-flagged heads, capped at the configured wage limit
VPF	Employee's voluntary PF percentage
ESI	Applied when gross is within the ESI threshold
Professional Tax	Employee and designation PT settings
TDS	Configurable income-tax slabs
Loan EMI	Any Active loan in Loan Setup
User Defined Deductions	Active custom deductions
Deduction-type salary heads NEW	Shown in the grid's **Head Ded.** column and on the deductions side of the payslip
LOP	Each unpaid day reduces proportionate salary heads by 1/days (actual month days, 26 or 30 per the LOP basis setting); the earned gross already includes it

9.3 Bulk update of a salary head NEW

1. Tick the employees in the Net Pay grid; the **Bulk Update Head** button appears.
2. Choose the salary head and enter the amount.
3. Select whether to **Set** the value or **Add** to the current value, then apply.
4. Alternatively use **Import Excel** in the same window to load per-employee amounts from a spreadsheet.

9.4 Toolbar actions

- **Cal TDS** — recalculate TDS for every row.
- **Transfer TDS** — mark the period's TDS as remitted, for records.
- **Challan** — PDF summary of total PF, ESI, Professional Tax and TDS for statutory deposit.
- **Clear Col** — clear one chosen column across all rows before re-entering.

- **Export** — Net Pay to Excel; **Payslips** shortcut to download payslips.

> Challan and Form 16 are computed from your payroll records for convenience. Always verify figures before filing.

10. Payslips & Payslip Designer

10.1 Payslips UPDATED

`Payroll › Payslips` lists every processed payslip for the period. The redesigned payslip shows the company logo (prominent) with a modest company name, income and deduction heads, loan details, amount in words and a footer disclaimer.

- Click a row to **preview**; then **Download PDF**, **Download Word** or **Print**.
- Tick several employees for the **Bulk Export Wizard** — many employees and months in one ZIP.
- **Email Selected** NEW — tick employees and click it to email each their payslip as a PDF attachment (Section 15).

10.2 Payslip Designer NEW

`Masters › Payslip Designer` is an optional drag-and-drop editor for your own payslip layout. The standard layout is used until you save a design.

1. Click a field in the left list to add it to the page, or add free text.
2. Drag an element to move it; use the bottom-right handle to resize.
3. In the property panel set exact X / Y / Width / Height (mm), font, size, weight, alignment and colour, and whether the field shows a label.
4. Click **Live Preview** to see it with a real saved payroll record.
5. Click **Save**. Use **Reset to Default** to return to the built-in layout, or **Remove from payslip** to delete the selected element.

Saved designs apply to the Payslips screen, Net Pay downloads and bulk ZIP exports alike — all use one shared payslip generator.

11. Reports & Form 16

`Reports › All Reports` opens the Reports Center.

11.1 Ready-made reports

Report	Description
Employee Master List	Active employees with personal and salary details
Monthly Attendance Log	Detailed daily attendance status
Salary Sheet	Monthly payroll with all heads and deductions
PF & ESI Statement	Contribution report
Bank Advice	Net-pay list for bank transfer
TDS & Tax Report	Tax deductions and projections
Yearly Salary Register	Annual summary per employee
Department Summary	Headcount and cost by department

Reports filter by month, year and employee, and export to Excel/CSV.

11.2 Form 16

1. Select Form 16 in the Reports Center.
2. Choose the Employee and Financial Year.
3. Click **Generate Form 16 PDF**.

This is a simplified system-generated certificate for internal use, drawn from saved payroll records — not a substitute for the statutory e-filed Form 16.

11.3 Custom Report Builder

Pick a data source (Employees, Payroll History, Attendance Logs), tick the columns (Select All / Deselect All), and export the resulting table.

12. Documents & Letters

`Documents › Letters` generates offer, appointment and other letters by merging your templates with a selected employee's data.

1. Create or edit a **template**; insert placeholders using the tag buttons, for example `{{name}}`.
2. Select the employee and the letter, then preview.
3. Use **Print**, **Download PDF** / **Word**, or **Email** NEW to send it to the employee's registered address.

Available tags include: Full/First/Last Name, Employee Code, Designation, Department, Branch, DOB, DOJ, Exit Date, Monthly Salary, Salary From, Father Name, Gender, Blood Group, Phone, Email, Full Address, City, PAN, Aadhaar, PF, ESI, UAN, Bank Name, Account No., IFSC, Emergency Contact, Company Name and Current Date. Two image tags, **Signature** and **Photo**, insert the employee's saved signature or photo. Reference-number prefix and sequencing are set in Settings › Document Config.

13. Other Modules & Availability

Everything reachable from the ribbon is described in Sections 3–12 and 14–18. Two further points:

> **Recruitment, Helpdesk, Performance and Assets screens.** Earlier guides described these modules. In version 3.2 their screens are not connected to the ribbon or the Dashboard, so they cannot be opened from the application. If your organisation relies on them, contact your MpxHR implementation partner.

- **Asset data** is still available as a table you can export to and import from Google Sheets (Section 16) and view or correct in the DB Viewer (Section 18).
- Module visibility for Masters, Attendance, Payroll, Reports and Documents is controlled in `Settings › Module Rights`.
- Employee-role logins see only their own attendance, leave and payslips (Section 20).

14. Importing Data & Files UPDATED

Employees and Attendance can be imported from Excel. Both now run a **pre-import validation** and show the findings in a preview window before anything is saved.

14.1 Steps

1. Click **Template** (Employees) or **Tpl** (Attendance) to download the correct sheet layout, and fill it in.
2. Click **Import** / **Imp** and choose the file.
3. Read the **preview**: the row table plus a list of warnings and errors.
4. If there are errors, tick the acknowledgement checkbox to unlock **Import** — or cancel, fix the sheet and try again. Warnings never block.

14.2 What is checked

Import	Checks
Employees	Duplicate Employee Code within the file; the same email on rows with different names; missing First Name; unreadable DOB or date of joining
Attendance	Unknown employee codes; unreadable dates; duplicate employee + date pairs; unrecognised status values; missing Employee Code or Status

14.3 Good to know

- **Dates** are read as DD/MM/YYYY (and Excel date serial numbers) — never silently as US-style MM/DD.
- Employees sharing one email (a supervisor's, for example) are **no longer merged**: email only counts as a match when the first name also matches.
- Salary columns such as *BasicSalary* and *SpecialAllowance* import into the salary structure that payroll reads.
- Dropdown/Yes-No custom field values are trimmed and matched ignoring case.
- Payroll itself has no Excel import — PF, ESI, TDS and Net Pay are computed from settings and attendance. Only salary-head amounts can be loaded in bulk (Section 9.3).

14.4 Photos, Signatures & Documents NEW

Employee photos, signatures and documents (Aadhaar, PAN, certificates ...) can be added one at a time in the employee form, or **in bulk** with `Masters › Employees › Import Files`. Bulk import works from a local folder, an Excel sheet, or a Google Drive folder, and always shows a preview before anything is saved.

One employee

- **Photo** and **Signature**: use the Browse buttons beside the employee form. The picture is checked against the current limits and scaled down if very large.
- **Documents**: open an existing employee, type a document type (or pick one from the list), click **Upload File**. Use the eye icon to open a document and the bin icon to delete it.

Many employees — Import Files

1. Click **Import Files** in the Employees toolbar and choose the source below.
2. Click **Preview**. Every file is listed with the employee it matches, where it will go (Photo, Signature or Document: type), its size, and a note if it will be skipped.

3. Click **Import**. Skipped files are left out; the rest are saved, and a final summary lists anything that failed.

Source	How files are matched to employees
Local folder	By file name, starting with the employee code: **EMP001.jpg** or **EMP001_photo.jpg** = photo; **EMP001_signature.png** = signature; **EMP001_Aadhaar.pdf** = document of type "Aadhaar". A sub-folder per employee also works: **EMP001/photo.jpg**, **EMP001/PAN.pdf**.
Excel sheet	One row per employee. Columns: **Employee Code**, then **Photo**, **Signature** and one column per document type. Each cell is a file name (looked up in the folder you choose), a full path, or a Google Drive link. A template can be downloaded in the wizard. Excel cannot hold the files themselves, only their names or links.
Google Drive folder	Put the files in one Drive folder using the same naming as a local folder. Choose the Google connection and give the folder link, id or name. MpxHR reads and downloads the files through your Google script.

> **Google script update needed.** Drive import needs the latest script. In Settings › Google Sync › Connect a Sheet, copy the script, paste it over the old one in Apps Script, deploy again, and approve the Drive permission if Google asks. The folder must be accessible to the Google account that owns the script. A Google Form cannot be created with a file-upload question by the script; if you add one by hand in the Form editor, Google stores the uploads in Drive and the response sheet contains links, which the Excel source can use.

Limits — set by you

Open `Masters › Settings › Files & Uploads` to choose, separately for **Photo**, **Signature** and **Documents**, the **maximum size** (0.05 to 50 MB) and the **allowed file types** (comma-separated, no dots, for example *pdf, docx, jpg*). The limits apply to every route — employee form, folder, Excel and Drive — and files outside them are listed as skipped with the reason. Photo and signature accept picture types only; program and script files (exe, bat, js, html and similar) are always refused.

Signature and photo can be placed in letters with the **Signature (image)** and **Photo (image)** tag buttons in the letter editor (Section 12).

15. Email Setup & Automatic Emails NEW

MpxHR can email payslips and letters and send automatic notifications. It is configured once for the whole app at `Masters › Settings › Email`, where a built-in Setup Guide also explains each step.

15.1 Choose a provider

Provider	When to use
SMTP server	Recommended. Gmail, Outlook / Microsoft 365, Zoho, Yahoo or your company mail server. One-click presets fill host, port and security.
Google account	When SMTP or App Passwords are not possible. Uses the Google Sync script; no password is stored in MpxHR.

15.2 Gmail via SMTP

1. In your Google Account › Security, turn on **2-Step Verification**.
2. Search **App passwords**, create one named "MpxHR" and copy the 16-letter code.
3. In MpxHR click the **Gmail** preset. Username = full Gmail address; Password = the App Password (not your normal password).
4. Fill From Name and From Email (use the same address), click **Save Email Settings**.
5. Type your own address beside **Send Test** and click it. If it arrives, everything else will work.

Outlook: use the **Outlook / 365** preset (smtp.office365.com, port 587, STARTTLS); your IT admin may need to enable Authenticated SMTP for the mailbox. Other hosts: port 587 with STARTTLS, or 465 with SSL/TLS.

15.3 What can be emailed

Email	How it is sent
Payslips	Payslips screen → tick employees → **Email Selected** (PDF attached)
Letters	Letters screen → choose employee and letter → **Email**
Leave decision	Automatic on Approve / Reject, if the "Automatic Emails" box is ticked
Birthday wishes	Automatic, once a day when MpxHR is opened, if ticked

> Each employee needs a valid **Email** in their profile; others are skipped and listed as failed. Gmail limits a normal account to about 500 emails a day.

15.4 Email templates

Edit subject and body for Payslip, Letter, Leave Approved, Leave Rejected and Birthday under **Email Templates**, then **Save Templates**. Placeholders are replaced when sending:

Template	Placeholders
Payslip	{name} {month} {company}
Letter	{name} {letter_type} {company}
Leave approved / rejected	{name} {leave_type} {from} {to} {days} {company}

Birthday	{name} {company}

15.5 Email troubleshooting

Message	Fix
Invalid login / not accepted	Gmail needs an App Password; check the username is the full address
Connection timeout / ECONNREFUSED	Wrong host/port or firewall; try 587 + STARTTLS or 465 + SSL/TLS
Wrong version number / SSL error	Security must match the port: 587 = STARTTLS, 465 = SSL/TLS
Lands in spam	Use a From Email matching the login account
Unknown action: sendMail	The deployed Google script is old — recopy and redeploy the latest one

16. Google Sync & Form Builder NEW

`Masters › Settings › Google Sync` connects MpxHR to a Google Sheet through a small script that runs **under your own Google account**. There is no Google sign-in inside MpxHR, no Cloud project and nothing to install; the shared secret is stored encrypted on your PC.

16.1 Connect a Sheet

1. Click **Connect a Sheet** and follow the on-screen instructions to copy the script into Apps Script from your Sheet and deploy it.
2. Paste the resulting web-app link and secret back into MpxHR.

> If you connected before email was added, recopy the **latest script** over the old one and redeploy so email sending works.

> Whenever MpxHR needs a newer script (for the Joiner Form or Google Forms) it opens a short guide: copy the script, paste it in Apps Script, **Deploy › Manage deployments › pencil › New version**, allow the permission, then press **Check now**. Never choose "New deployment": that changes your link.

16.2 Table Sync

Click **New Sync** to link a database table with a Sheet tab. Tables available: Employees, Departments, Designations, Attendance, Loans, Assets (and your custom tables). Syncs can be **edited** in place.

- **Export** — write a table to a tab.
- **Import** — rows pulled from the tab go to the **Review Queue**. Column mapping is guessed automatically and you can adjust it.
- A **preview** shows what a sync will do before it runs.

16.3 Review Queue

Nothing becomes a real record until you approve it. Each mapping gets its own table; cells with problems are highlighted amber with a warning icon (hover for the reason).

Checked on import	Behaviour
Dates (DOB, joining)	Read as DD/MM/YYYY and stored in a standard format; invalid values are flagged
Duplicate keys in the same sheet	Flagged on the row (for example, one email on two employees) instead of being silently skipped
Employee last name	Optional

16.4 Form Builder

Design a **Google Form** from any table's fields — or link several tables (for example Employee + Loan) so one submission fills them all. Generate the form through the connected Sheet, share the link, and review incoming responses in a section-by-section preview before approving them into real records.

17. Custom Fields & Custom Tables NEW

`Masters › Settings › Custom Fields` lets you extend MpxHR without any code change.

17.1 Add a field to an existing form

1. Choose the **Table** (for example Employees).
2. Enter a **Label**, choose a **Type** and mark it **Required** if needed.
3. Click **Add Field**. It appears on that table's forms immediately.

Type	Use
Text / Long Text	Short or multi-line text
Number	Numeric value
Date	Date picker
Yes / No	Tick box
Dropdown	Fixed list — give comma-separated options, e.g. A, B, C
File / Image	Upload a document or picture

17.2 Create a new table

Under **Create New Table** enter a name (for example *Vendors* or *Training Records*) and click **Create Table**. Add fields to it as above, then add and view its **Records** directly on this screen. Existing fields can be edited, and custom tables can be deleted.

18. Settings Reference

`Masters › Settings` has a left-hand menu of tabs:

Tab	What you configure
General	Theme and date-format preferences
Branding	Application name and logo shown across the app and on login
Notifications	Birthday and work-anniversary desktop notifications
Salary Components	Company-wide earning and deduction defaults
Payroll & Leave	Month start day, LOP basis, overtime multiplier, default probation days, LWF contribution and frequency, leave accrual rules, PL/CL monthly credit, RH annual quota
Document Config	Letter reference prefix and sequencing
Database Maintenance	Manual and automatic backups, restore (Section 19)
DB Viewer NEW	Administrator-only direct view and edit of any database table
Email NEW	Provider, automatic emails, templates (Section 15)
Google Sync NEW	Sheets, table syncs, review queue, Form Builder (Section 16)
Custom Fields NEW	Extra fields and tables (Section 17)
License NEW	Trial or plan status, employee and company usage, and the box to enter or renew a license key
Files & Uploads NEW	Maximum size and allowed file types for photos, signatures and documents (Section 14.4)
Security & Users	Admin password, master recovery password, user accounts
Module Rights	Show or hide whole ribbon modules for this installation

DB Viewer

Pick a table, search across all columns, page through rows and use **Add Row** or the row editor. It bypasses the validation of normal screens, so a wrong edit (for example an unhashed password) can break data — **take a backup first** and use it only for corrections you fully understand.

19. Backup, Restore & Data Security

`Masters › Settings › Database Maintenance` shows the date and contents of your last backup at the top. A card turns **green** when the last backup is recent and **amber** when it is a week old or more, or when none has been taken.

19.1 Back up now

- **Everything (data + documents)** — a .zip with the database and every uploaded file (documents, joiner files). This is the safest choice.
- **Data only** — a compact .sqlite file with all records. Type a password first to save it encrypted (.enc). Remember the password: without it an encrypted backup cannot be opened.
- MpxHR takes a consistent copy of the database even while you are working, checks the file after saving, and tells you what it holds (for example "44 employees, 1 company, 123 payroll rows").
- Save a copy on a pen drive or in a Google Drive / OneDrive folder, not only on this computer.

19.2 Automatic backup

- Tick **Back up automatically every time I close MpxHR**, and optionally **Also include uploaded documents**.
- **Save in folder** — choose a folder (a Drive/OneDrive-synced one keeps a copy in the cloud). **Open** shows it in Windows. If the folder is not available (for example a pen drive that is unplugged) the backup is saved in a safe default folder instead of being lost.
- **Keep the latest** — how many automatic backups to keep (1 to 200). Older ones are deleted.
- **Back up now to this folder** makes an automatic-style backup immediately.

19.3 Recent automatic backups

The list shows the newest automatic backups with date and size. Click **Restore** on one to bring it back without browsing for a file.

19.4 Restore from a file

Click **Choose a backup file** (.zip, .sqlite or .enc) and type the password for an encrypted one. Restoring replaces **all** current data and documents.

- MpxHR first checks the file: the password, that it is a MpxHR database, and its integrity. A wrong password or a damaged file stops the restore and changes nothing.
- A **safety copy of the data you had** is saved in the *backups › before-restore* folder (the last five are kept), so a mistaken restore can be undone.
- Files from a zip are written only inside MpxHR's uploads folder. Afterwards MpxHR **restarts** so every screen loads the restored data.

19.5 Where is my data?

In the installed program the database is **%APPDATA%\mpxhr-desktop\database.sqlite** and the uploaded files are in the **uploads** folder beside it. Backups made with MpxHR 4.1.x or older did **not** reliably include the database, so after upgrading to 4.2 take a new **Everything** backup straight away.

> Take a fresh backup before restoring, before upgrading MpxHR and before any large import.

19.6 Built-in protection

- Passwords are stored hashed; the Google Sync secret is encrypted with the operating system's secure storage.
- Administrative actions (deleting records, restore, DB Viewer, raw queries) need an active administrator session.
- Only one copy of MpxHR can run at a time, protecting the database from write conflicts.
- Company data is isolated per company; activity is written to a local diagnostic log for support.
- `Masters › Data Security` opens a short in-app guide to these practices.

20. User Roles, Passwords & Recovery

Role	Access
Administrator	All modules, all employees' data, payroll, settings, backups, user management
Employee	Self-service: own attendance, leave application and payslips

Create employee logins in `Settings › Security & Users`, linking each to an employee record.

Changing the admin password

In Security & Users type the new password twice and click **Update Profile**.

Master recovery password NEW

An administrator can set a backup password that logs in as **any** user — enter the person's username as usual and the master password instead of theirs. It lets you recover access when someone forgets a password. Leave the field empty and save to remove it. The tab shows whether one is currently set.

> Keep the master password secret and private — anyone who knows it can sign in as any user.

21. Keyboard Shortcuts & Tips

Shortcut	Action
`Ctrl` + `S`	Save the current form (works while typing)
`Ctrl` + `N`	New record
`Ctrl` + `E`	Edit the selected record
`Del`	Delete the selected record(s)
`Ctrl` + `R`	Refresh the current screen
`Ctrl` + `P`	Print
`Esc`	Close the open dialog (works while typing)
`Alt` + `1` – `4`	Switch between the first four ribbon tabs

Shortcuts other than Save and Esc are paused while your cursor is inside a text box. Click the keyboard icon in the title bar to see the list in the app.

Good habits

- Check the Company / Financial Year / Month in the context bar before every entry.
- Mark attendance completely (use Auto-Fill) before calculating payroll.
- Close a month once payroll is final.
- Back up before bulk deletes, imports, restores or DB Viewer edits.
- Preview imports carefully — fix errors in the sheet rather than overriding them.

22. Onboarding & the Joiner Form NEW

`Masters › Onboarding` helps you receive a new person properly **before** an employee record exists: collect their details and documents, follow a joining checklist, and turn them into an employee with one click.

22.1 Add a new joiner

1. Click **New Joiner** and enter the name, email, phone, department, designation, branch and expected joining date.
2. Save. The standard **joining checklist** is created for that person (documents to collect, HR steps, IT and admin steps).
3. The list shows each joiner with a progress bar and a status: **Pending**, **In progress** or **Completed**. The cards at the top count them.

22.2 The checklist

- Select a joiner and click **Checklist** (or double-click the row). Tick a step when it is done, or add and remove your own steps. The status changes by itself.
- **Checklist Template** edits the standard list. Write one step per line as *Group* | *Task*. It applies to **new** joiners; people already added keep their list. **Restore default** brings back the original steps.
- **Print Form** prints a joining form with blank lines for the joiner to fill by hand, plus the checklist, with signature lines.

22.3 Make Employee

Select the joiner and click **Make Employee**. MpxHR creates the employee with the name, email, phone, company, branch, department, designation and joining date, ticks the "Employee record created" step, and copies everything the joiner sent through the form (see below): profile fields, custom fields, photo, signature and documents. Then open `Masters › Employees` to add the employee code, salary and the remaining details. The employee limit of your license applies as usual.

22.4 The Joiner Form (online link)

Let the joiner fill in their own details and upload documents from a phone. It runs on **your own Google Sheet script** (the same one used by Google Sync, Section 16). MpxHR never stores your Google login.

1. **Choose the questions.** `Onboarding › Joiner Form › Questions & documents`. Tick what the joiner should upload (photo, Aadhaar copy, PAN copy, bank proof, certificates, relieving letter ...) and fill in (PAN number, UAN, date of birth, address, bank details ...). Name, mobile, email, department, designation, joining date and notes are always asked. Tick **Must fill** for compulsory ones. You can also add your own question.
2. **Get the link.** Click **Get link / Share**. The first time (and after an MpxHR update) a short five-step guide appears to paste the new script into your Google Sheet; the **Check now** button tells you which step is still missing. Then copy the link or send it by WhatsApp or email.
3. **Joiner fills the form.** The answer is saved as a new row in the tab **New Joiners** of your Sheet; uploaded files go to a private folder **MpxHR Joiner Uploads** in your Google Drive.
4. **See what came in. View responses** lists every submission (read-only): new ones and already-added ones, with answers and document names. Nothing is added to Onboarding yet.
5. **Add them. Add new joiners** downloads the documents to this computer, creates each joiner with the checklist, and ticks the matching checklist steps (for example "Aadhaar card copy"). People already in the list (same email or phone) are skipped.

22.5 Where each answer goes, checks and limits

Open **Options** on a question to change the defaults, which are already sensible:

Setting	What it does
Save the answer to	Keep with the joiner only; an Employee profile field (PAN, Aadhaar, bank, address ...) or an Employee custom field; for files: the employee photo, signature or a document type. Applied when you click **Make Employee**.
Check the answer is	PAN (ABCDE1234F), Aadhaar (12 digits), IFSC, UAN (12 digits), PIN code (6 digits), mobile (10 digits), bank account (6–20 digits), email, letters only, digits only. Spaces are tidied and PAN/IFSC are made capital automatically.
Longest answer, smallest / largest	Limits for text length and number ranges. Dropdown answers must be one of the choices.
Biggest file, allowed types	Per file question, up to **5 MB** (a Google script limit) and PDF, JPG, PNG or DOCX. A photo or signature can only be JPG or PNG. The limits in `Settings › Files & Uploads` also apply when the file is brought in.
Tick checklist step	Which checklist step becomes done when this answer or file arrives.

The checks run three times — on the form page, in your script, and again in MpxHR — so a hand-made request cannot slip a bad value through.

> **The link is public, the data is not.** Anyone with the link can submit the form, but nobody can read the answers through it; they exist only in your Sheet and Drive. The same phone number cannot submit twice within a minute, and a hidden field blocks simple bots.

22.6 Google Form (advanced)

In `Onboarding › Joiner Form` you can also build a real Google Form (Section 16). It asks the fixed joiner fields and its answers wait in the review queue. It needs the extra Google Forms permission in your script and **cannot take file uploads**, so the online link above is recommended. Forms have **Preview** (shows the questions as they will be asked) and **Share** (copy the link, send it by WhatsApp or email).

23. Troubleshooting & Support

Issue	What to try
Forgot a password	Sign in with the master recovery password if one is set; otherwise contact your administrator or MpxHR support
Payroll figures look wrong	Check Financial Year / Month, make sure attendance is complete, confirm the salary structure and salary-head flags, then refresh/recalculate before saving
A module is missing from the ribbon	Check Settings › Module Rights
Cannot open a second window	By design — only one copy of MpxHR runs at a time
Financial Year dropdown lacks a year	It lists current year −4 to +1 and selects today's year automatically
Import preview shows errors	Fix duplicates, dates (DD/MM/YYYY) or unknown codes in the file and import again
Emails fail	Use Send Test in Settings › Email and see Section 15.5; confirm the employee has an Email on file
Google Sync errors	Make sure the latest script is deployed, the link and secret are correct, and you are online
Joiner form shows "older version"	Click **Get link / Share** again and follow the five-step guide to paste the latest script, deploy a **New version** and allow the permission; then press **Check now**
Joiner form does not show my new questions	After changing questions press **Get link / Share** once to send them to the form
A backup folder on a pen drive is not found	The backup is saved in the default folder instead; open `Database Maintenance` and press **Open** to see where it went
Payslip layout looks off	In the Payslip Designer click Reset to Default, or adjust the element and use Live Preview

> For further help use **Contact Support** (title bar or login screen) or reach out to your MpxHR implementation partner.