

Overview Video

https://www.youtube.com/embed/dxlnex_cmlw

Step-by-Step Tutorial Guide

Step 1: Open the Employee Module

1. Log in to the TankhaPay dashboard.
2. From the left-side navigation panel, click **Employees**.
3. The Employee Management dashboard opens, displaying:
 - Employee statistics
 - Employee list
 - Search and filter options
4. Locate the **Bulk Upload** button on the top-right corner of the employee list.

This section allows HR teams to add multiple employees simultaneously.

Step 2: Open the Bulk Add Employee Page

1. Click **Bulk Upload**.
2. Select **Bulk Add Employee** from the available options.

3. The **Bulk Add Employee** page opens.

The page contains:

- File upload section
- Sample template download option
- Upload instructions
- Validation guidelines

Step 3: Download the Sample Template

1. On the Bulk Add Employee page, click **Download Sample Template**.
2. Save the Excel file to your computer.
3. Open the downloaded template before entering employee details.

Using the provided template ensures the data matches the required system format.

Step 4: Review the Template Instructions

Before filling in the Excel sheet, review the instructions displayed on the page.

The instruction section explains:

- Mandatory fields that must be completed.
- Required data formats for each column.
- Accepted values for dropdown-based fields.
- Validation rules for employee information.
- Guidelines to prevent upload errors.

Reading these instructions helps avoid data validation issues during import.

Step 5: Enter Employee Details in the Template

1. Open the downloaded Excel template.
2. Enter employee information in the appropriate columns.
3. Complete all mandatory fields as instructed.
4. Verify that all data follows the specified format.
5. Save the completed Excel file.

Ensure the template structure remains unchanged while entering employee information.

Step 6: Upload the Employee File

1. Return to the **Bulk Add Employee** page.
2. Click the file upload area or **Choose File** option.
3. Browse your computer.
4. Select the completed Excel template.
5. Upload the file.

The selected file appears in the upload section once it has been successfully attached.

Step 7: Import Employee Records

1. After selecting the file, click **Upload**.
2. The system validates the uploaded data.
3. If validation is successful, the employee records are imported into the system.
4. If any errors are found, review the error details, correct the Excel sheet, and upload the file again.

The validation process ensures only correctly formatted employee records are imported.

Step 8: Verify Uploaded Employees

1. After the upload is completed, return to the **Employees** dashboard.
2. Review the employee list.
3. Confirm that the newly uploaded employees appear in the list.
4. Use the search option if required to verify specific employee records.

This confirms that the bulk upload process has been completed successfully.

Key Benefits of the Bulk Add Employee Feature

- Add multiple employees in a single upload.
- Reduce manual data entry.
- Standardize employee information using a predefined template.
- Minimize upload errors through built-in validation.
- Save time during onboarding of large employee batches.
- Improve accuracy and consistency of employee records.

End of Tutorial

You have now completed the **Bulk Add Employee** walkthrough in TankhaPay.

This feature enables HR teams to quickly onboard multiple employees using a standardized Excel template, ensuring faster data entry, improved accuracy, and efficient workforce management.

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