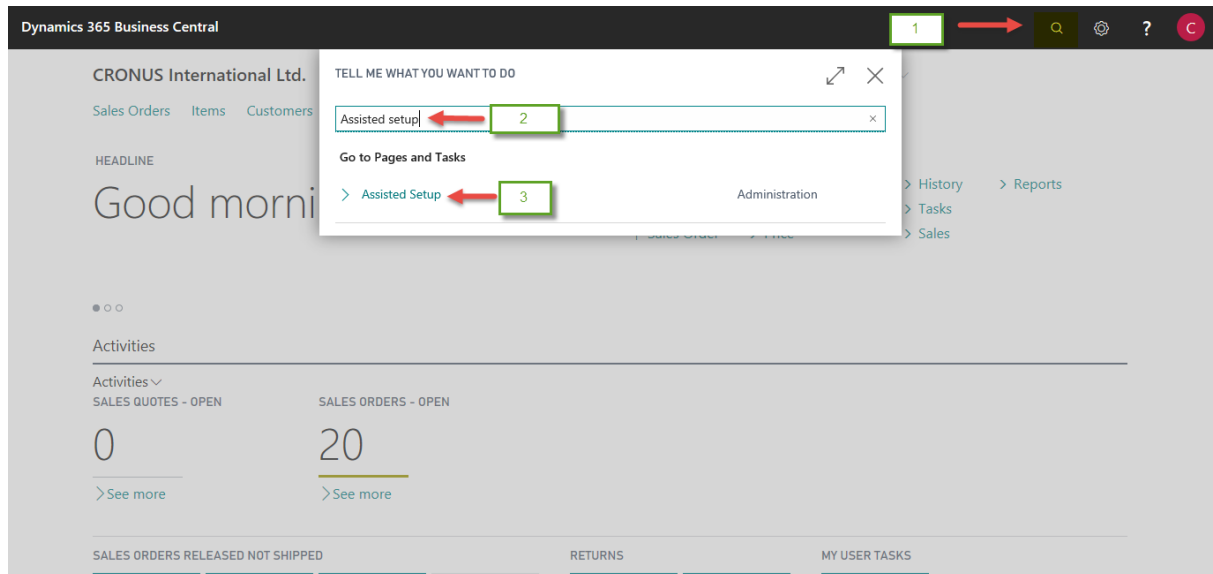


PAYPRO365 Assisted Setup

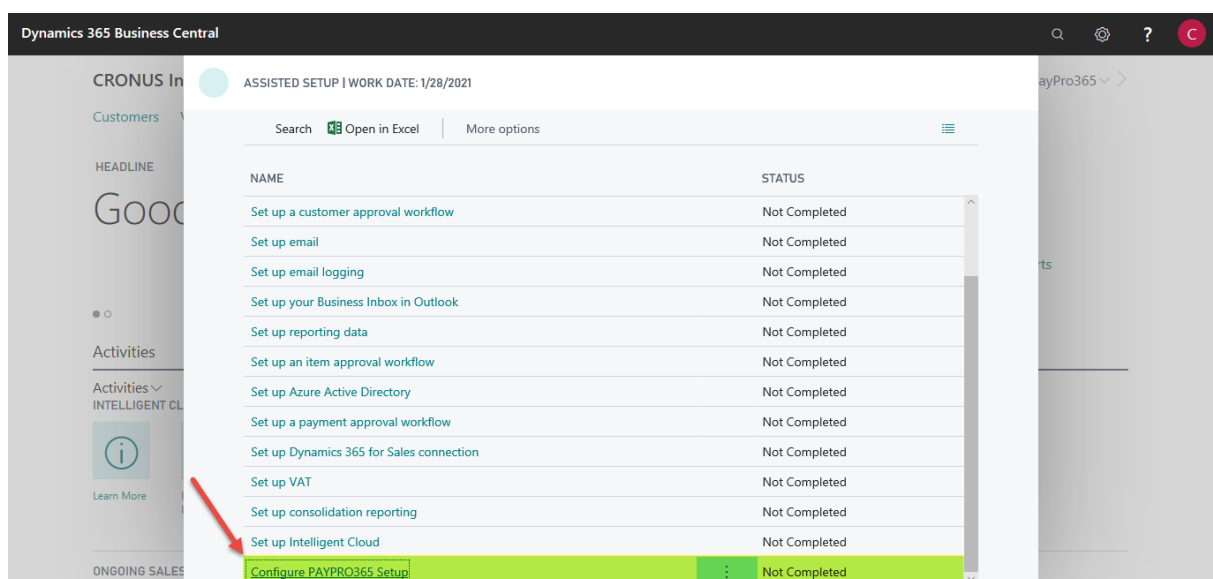
Before getting started with PAYPRO365 it is important to setup the configuration of PAYPRO365

Guidelines

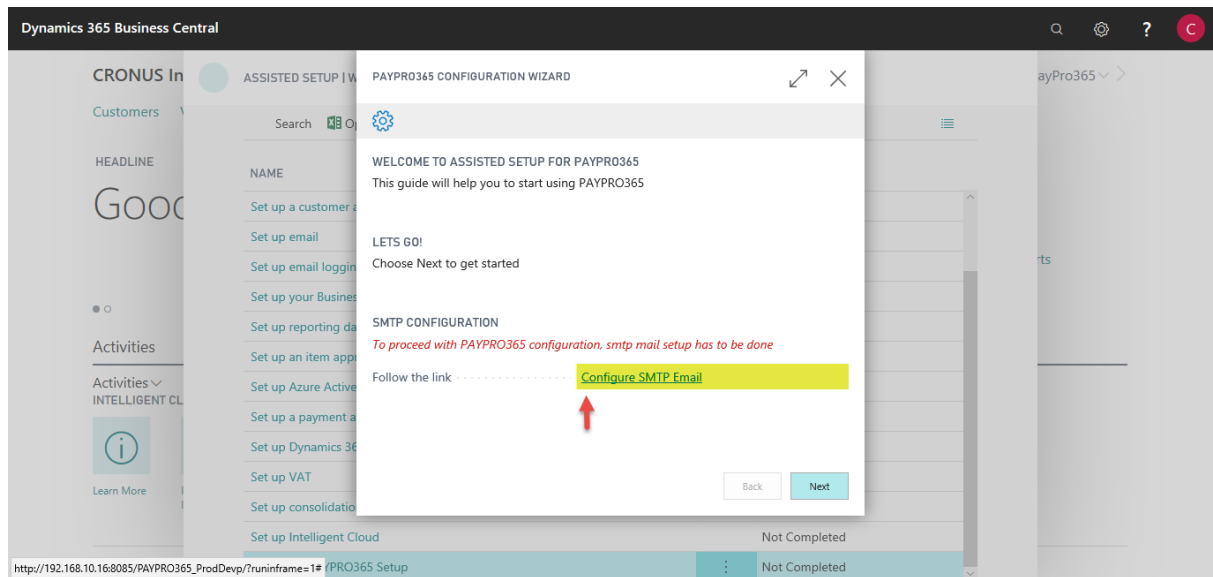
- **Step 1:** Search → Assisted Setup



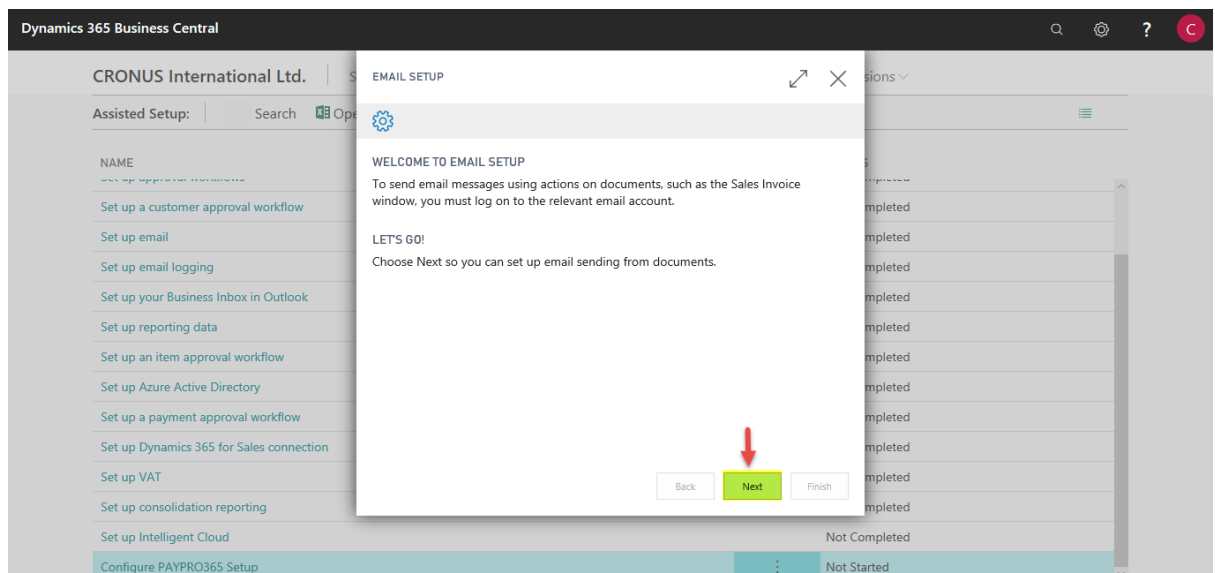
- **Step 2:** Click 'Configure PAYPRO365 Setup' to open setup page



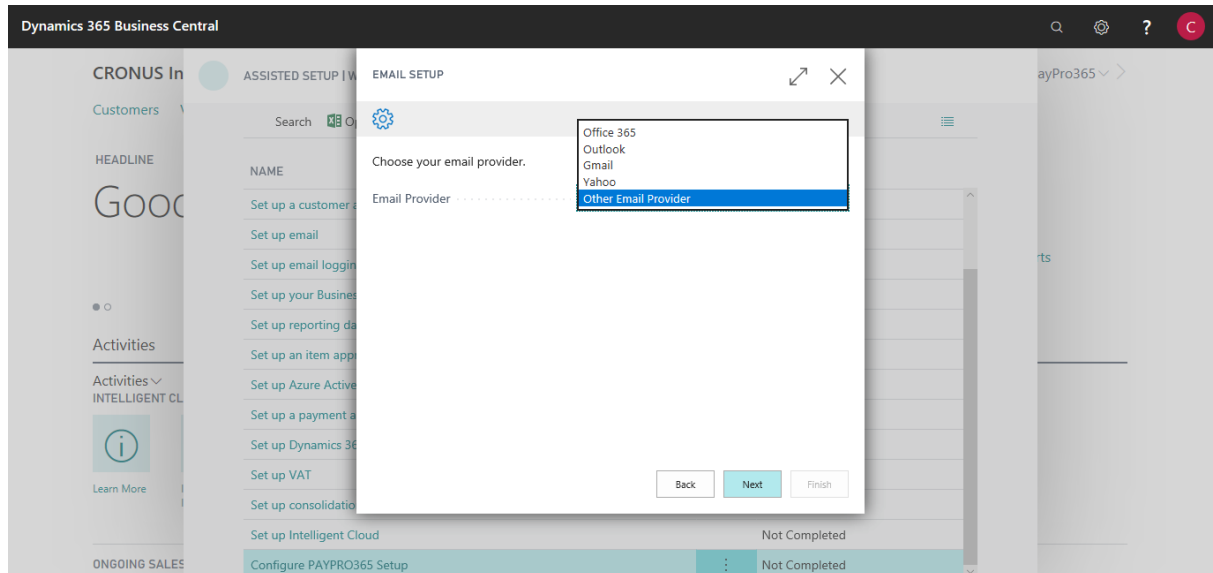
- **Step 3:** To proceed with PAYPRO365 setup 'SMTP mail setup should be completed', if not click the link 'Configure SMTP email'



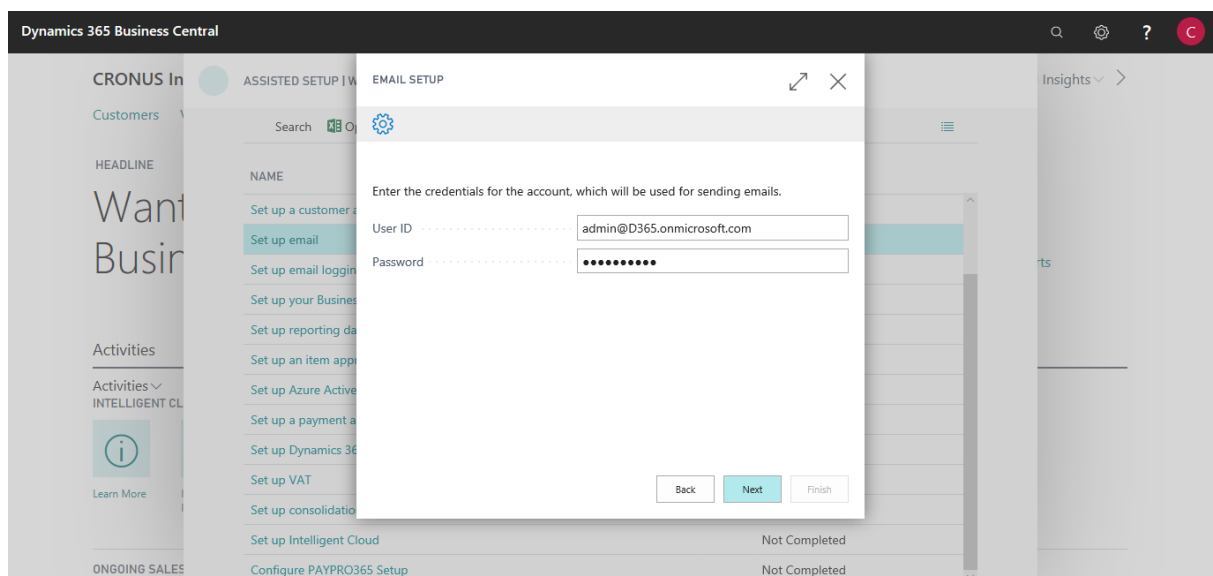
- **Step 4:** To proceed with email sending setup, click 'Next'



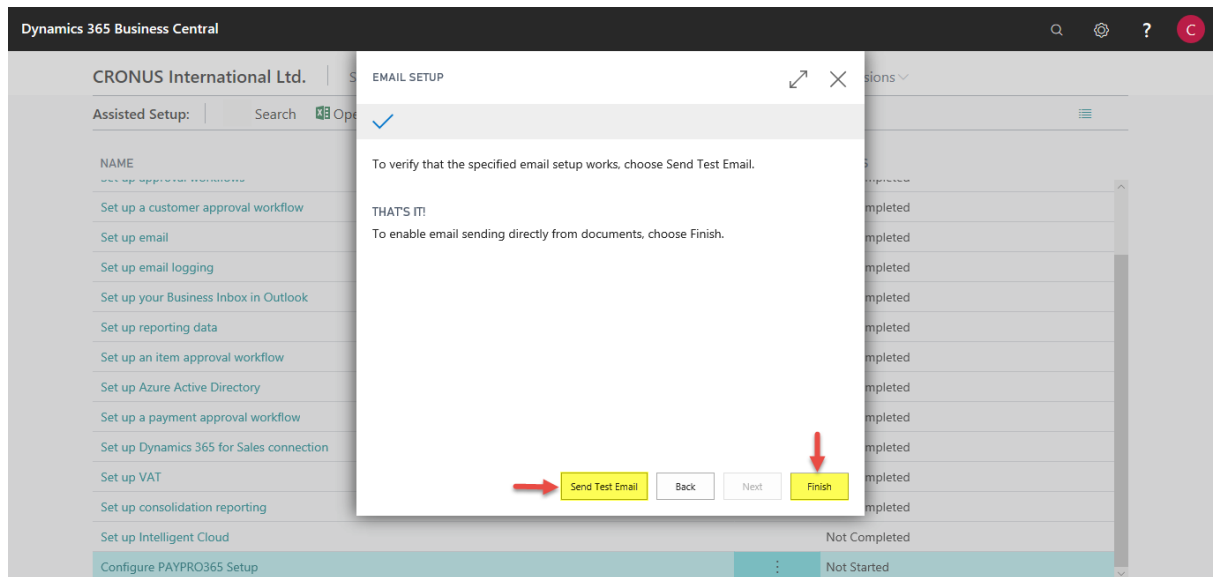
- **Step 5:** Choose the email provider and click Next



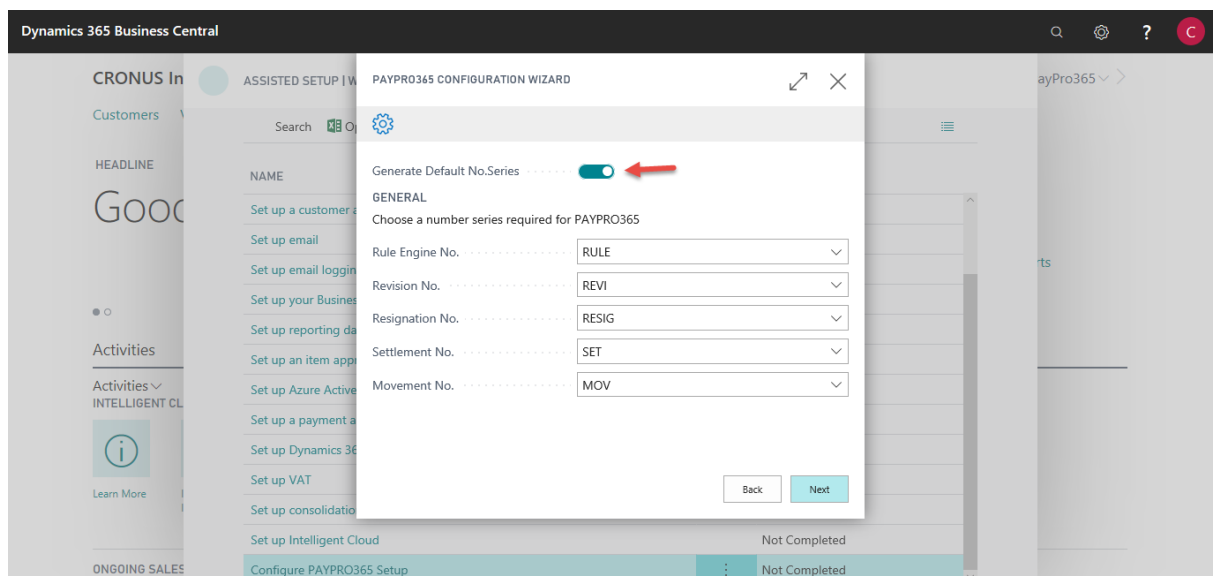
- **Step 6:** Provide username and email id to complete email setup and click Next and then Finish to proceed with PAYPRO365 setup



- **Step 7:** To test the specific email setup work, choose send test email. Then click Finish to complete the email id setup.

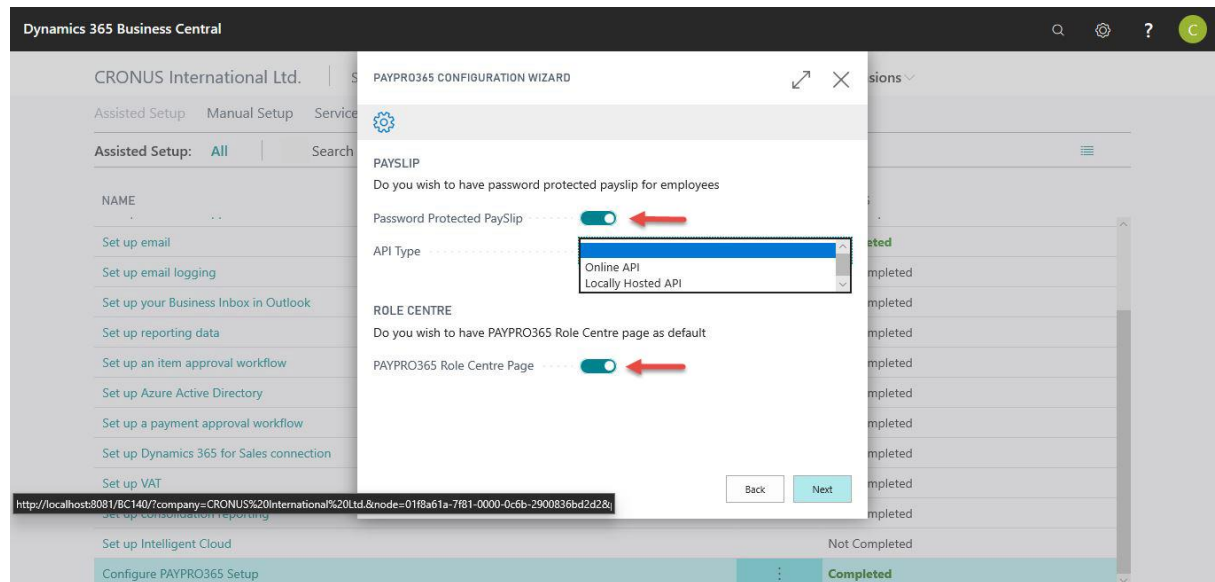


- **Step 8:** Provide No. Series that is defined for Employee Related Activities by selecting Generate Default No. series it flows default no. series to the fields or you can choose manually, if no values are provided you can skip this page by clicking Next button

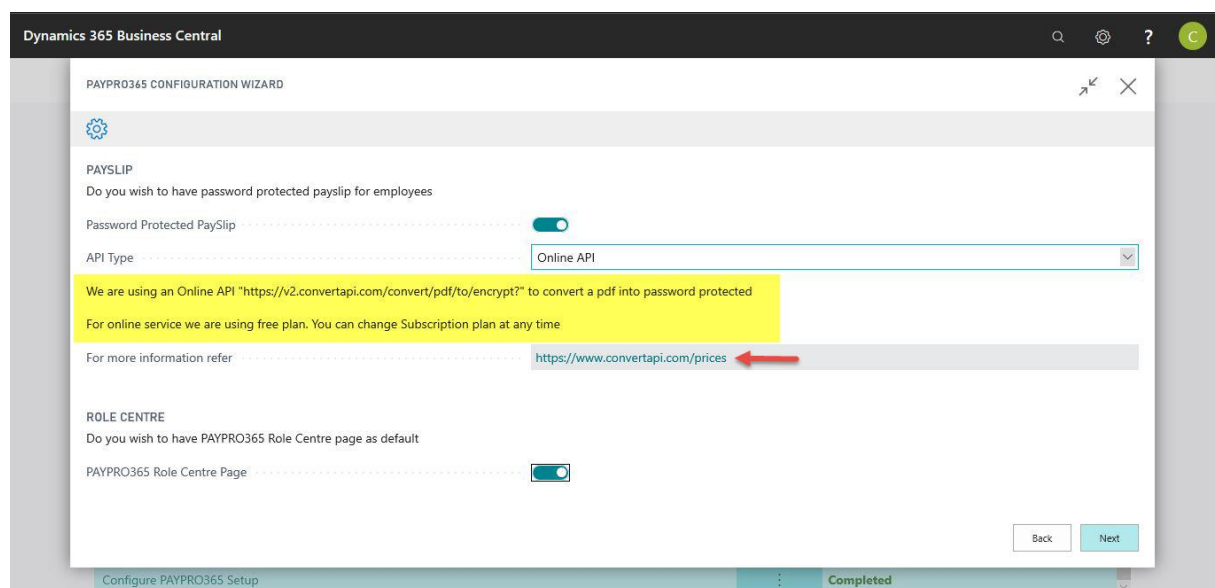


- **Step 9:** Select 'Password Protected Payslip' if Payslip need to send with password protected. If you select the password protected payslip, please provide which API type you going to follow – Online API
Locally Hosted API

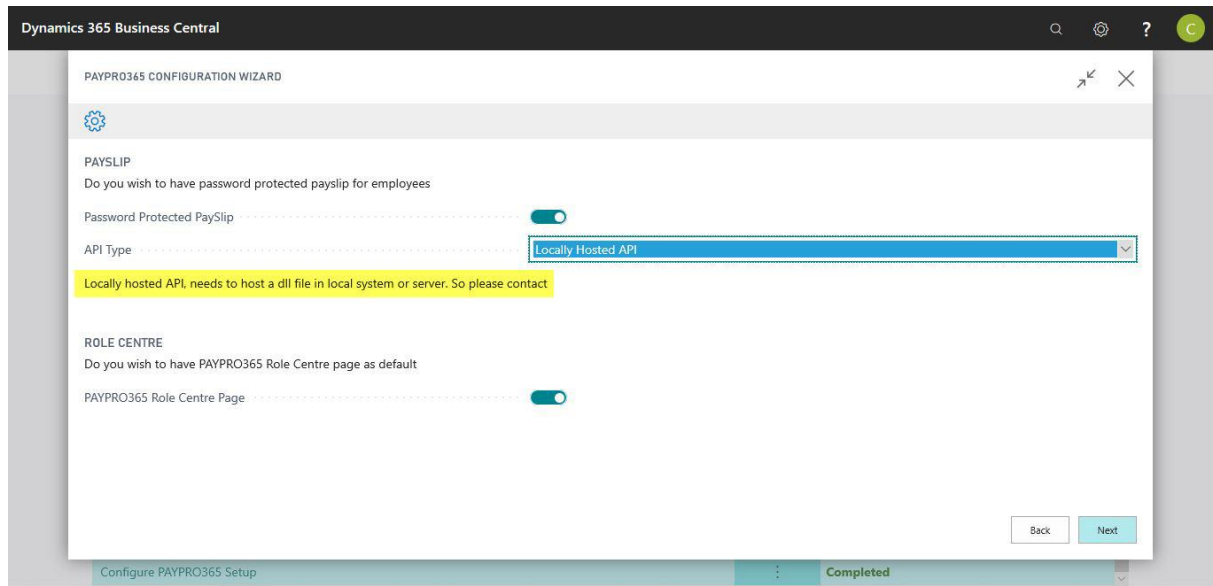
Select PAYPRO365 Role Centre page if you want paypro365 role centre page as default.



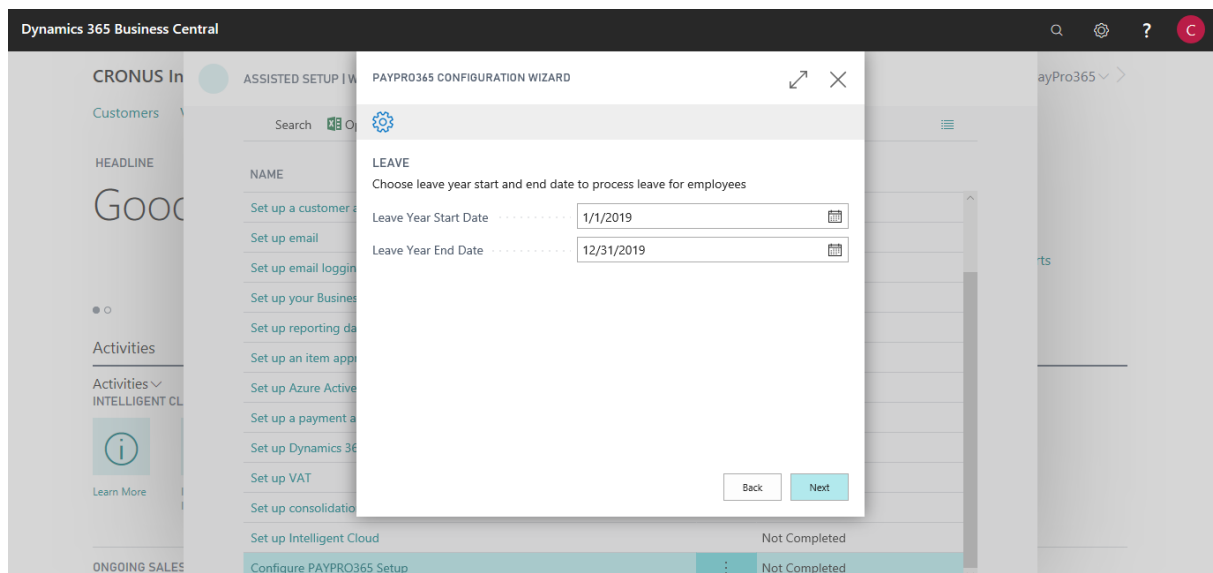
- **Step 10: Online API**



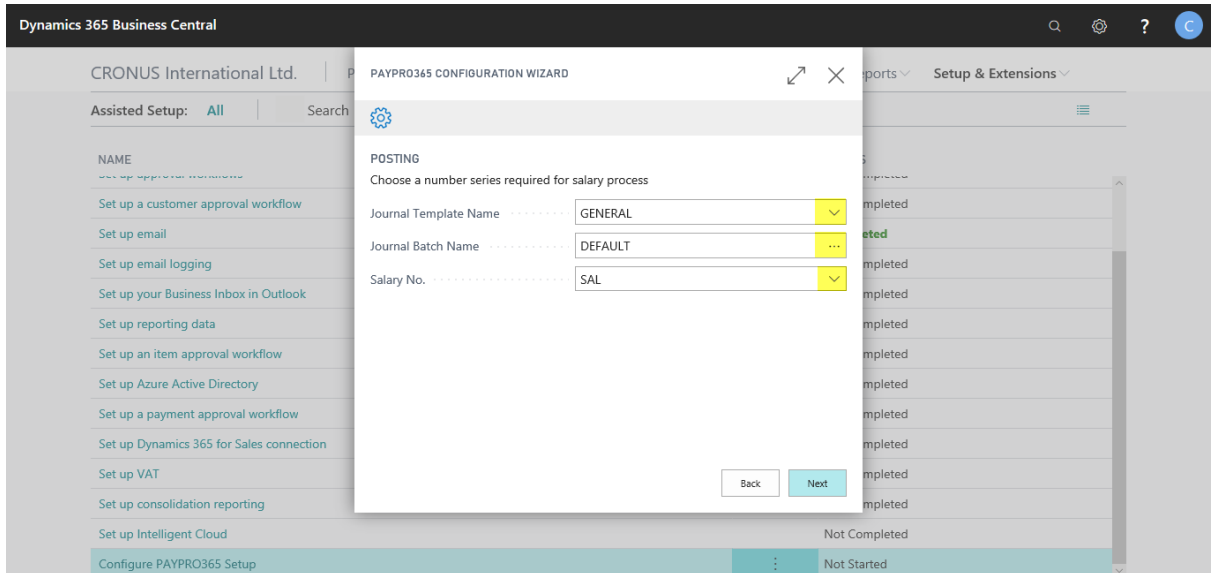
- **Step 11: Locally Hosted API**



- **Step 12: Provide a Leave Year start & end date to process leave for employees then Click Next to continue**

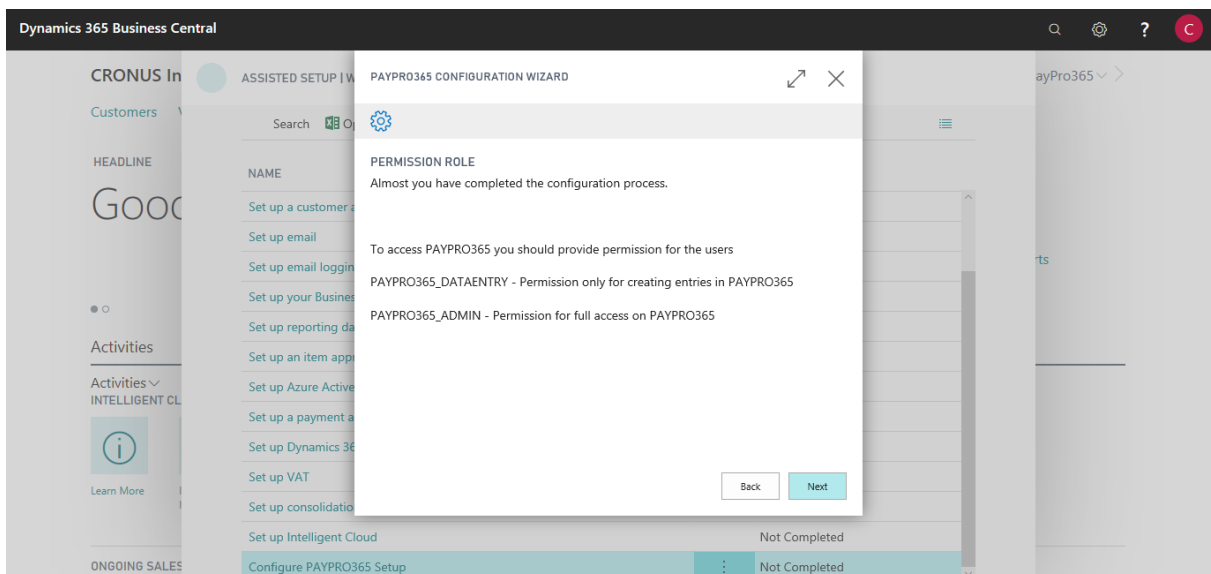


- **Step 13:** Provide Journal Template & Batch name which going to use for the salary payment journal and provide a number series for salary entries, if Generate Default No.series is true than Automatically No.series will flow to this field then click Next to continue.



The screenshot shows the 'PAYPRO365 CONFIGURATION WIZARD' in the 'POSTING' step. The wizard is titled 'Choose a number series required for salary process'. It contains three dropdown menus: 'Journal Template Name' set to 'GENERAL', 'Journal Batch Name' set to 'DEFAULT', and 'Salary No.' set to 'SAL'. At the bottom right, there are 'Back' and 'Next' buttons. The background shows the 'Assisted Setup' list with 'Configure PAYPRO365 Setup' highlighted.

- **Step 14:** To access PAYPRO365 pages user needs permission, this page contains the details about permissions to be set to user read it and click Next to continue



The screenshot shows the 'PAYPRO365 CONFIGURATION WIZARD' in the 'PERMISSION ROLE' step. The wizard is titled 'Almost you have completed the configuration process.' and 'To access PAYPRO365 you should provide permission for the users'. It lists two permissions: 'PAYPRO365_DATAENTRY - Permission only for creating entries in PAYPRO365' and 'PAYPRO365_ADMIN - Permission for full access on PAYPRO365'. At the bottom right, there are 'Back' and 'Next' buttons. The background shows the 'Assisted Setup' list with 'Configure PAYPRO365 Setup' highlighted.

- **Step 15:** Finally, click Finish button to complete PAYPRO365 Configuration Setup

