

# Employees

## Human resources and payroll

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# Employees

Create and maintain employee records, including departments, designations and statutory numbers.

Beginner · About 20 minutes · Version 1.0 · Updated 17 November 2026

**Plan availability**

Included in the **Enterprise** plan. Contact us if you want to upgrade.

## Overview

An **Employee** record is the foundation of HR and payroll. Leave, attendance and salary all attach to it.

## Prerequisites

The HR Manager or HR User role. Create your **Departments** and **Designations** first (search for each and click **Add**).

## Steps

### Add an employee

1. Search for **Employee** and click **Add Employee**.
2. Enter **First Name**, **Last Name**, **Gender** and **Date of Birth**.
3. Enter the **Date of Joining**, and choose the **Company**.
4. Choose the **Department**, **Designation** and **Employment Type** (permanent, contract, casual and so on).
5. Add contact details, including a personal email.
6. Open the **Salary** tab and enter the **Bank Account** details, so salaries can be paid.
7. Click **Save**.

### Statutory numbers

Record each person's **KRA PIN**, **National ID**, **NSSF number** and **SHA/SHIF number**. Payroll reports for the authorities need them. If your form has no field for one of these, add it. See Custom fields and forms.

### Let an employee sign in

1. In the employee record, set **User ID** to the person's user. Create the user first if needed. See Creating users and assigning roles.
2. The employee can then apply for leave and see their own records.

### When someone leaves

1. Open the record, set **Status** to **Left**, and enter the **Relieving Date**.
2. Do not delete the record. Payroll and audit history depend on it.

## Practical example

Mwangaza Hardware hires a storekeeper. HR creates the employee, picks the *Stores* department and *Storekeeper* designation, adds KRA PIN and bank details, and links the employee to a user that has only stock roles.

## Important notes

- Keep records accurate: wrong bank or PIN details cause payroll errors.
- Restrict who can see salary details.

## Common mistakes

- Deleting leavers instead of marking them as **Left**.
- Two records for the same person, which splits their history.

## Next steps

Read Attendance.

## Related documentation

- Human resources overview
- Salary components and structures
- Creating users and assigning roles