# PayPilot Onboarding Workbook

### ***End-to-End Consultant Operations, Compliance & Management Platform***

*A Product by ATEK IT INC.*

## Document Information

**Title:** PayPilot Onboarding Workbook
**Version:** 1.0
**Prepared by:** ATEK IT INC. – Product & Technology Division
**Last Updated:** October 2025
**Intended Audience:** Clients, Finance Teams, HR/Legal Departments, Operations Managers

## 1. Welcome to PayPilot

Welcome to **PayPilot**, your all-in-one platform for **consultant management, invoicing, payouts, and immigration compliance**.
This workbook is your step-by-step guide to setting up, using, and mastering PayPilot — ensuring your organization achieves full operational efficiency within 90 days.

> **Objective:** By the end of this onboarding, your team should be able to automate timesheets → invoices → payouts → compliance tracking seamlessly.

## 2. Getting Started

### 2.1 Accessing PayPilot

- **URL:** https://app.paypilot.io
- Ensure you are using an updated browser:
    - Google Chrome (v120+), Microsoft Edge (v118+), or Safari (v17+).
- Internet speed: Minimum 2 Mbps recommended.

### 2.2 Logging In for the First Time

1. You'll receive a **Welcome Email** with your login credentials.
2. Click the **"Activate Account"** link.
3. Set your secure password (must include at least one symbol & capital letter).
4. Enable **Two-Factor Authentication (2FA)** for security.

*Tip:* Bookmark your PayPilot dashboard for daily access.

# 3. Setting Up Your Organization

## 3.1 Company Profile Setup

Navigate to **Settings** → **Organization Details**
Fill in:

- Company name, address, and contact information.
- Upload your company logo.
- Set the invoice prefix (e.g., "ATEK-INV-###").
- Define working week (Mon–Fri or Sun–Thu).

## 3.2 User Roles & Permissions

Roles available:

- **Admin:** Full access to settings and data.
- **Finance Manager:** Access to invoices, payouts, reports.
- **HR/Legal:** Access to consultant and immigration modules.
- **Consultant:** View own timesheets and pay history.

Set roles under **Settings** → **User Management** → **Add User**.

⚠️ *Note:* Only Admins can modify or remove users.

### 3.3 Security Settings

- Enable **2FA** for all users.
- Set session timeout (default 30 minutes).
- Configure password renewal policy (90 days recommended).

# 4. Core Functional Modules

### 4.1 Consultants

Go to **Consultants → Add New Consultant**
Enter:

- Personal information (Name, Email, Phone).
- Vendor or Client Company.
- Pay Rate, Bill Rate, Employer Tax %.
- Employment Type (W2, C2C, or 1099).

Upload documents such as offer letters, ID proof, or contracts.

> *Pro Tip:* Use the "Bulk Import" option via CSV if adding >50 consultants.

### 4.2 Timesheets

1. Navigate to **Timesheets → Add Entry**.
2. Select consultant and client.
3. Input date range and hours.
4. Click **Auto-Calculate** → PayPilot computes billable totals & margins.
5. Submit for approval.

Compliance Dashboard will display:

- Missing or late timesheets.
- Consultants with repeated non-submission.

## 4.3 Invoice Management

1. Go to **Invoices** → **Generate New Invoice**.
2. Select consultant & timesheet period.
3. Review calculated totals (Bill Rate × Hours).
4. Click **Generate PDF** or **Send via Email**.
5. System automatically logs the invoice.

Invoice Statuses:

- **Pending Approval**
- **Sent to Client**
- **Paid / Overdue**

> *Reminder:* Set auto-reminders under **Settings** → **Notifications** to chase overdue payments.

## 4.4 Consultant Payments

1. Navigate to **Payments** → **New Payout.**
2. Select consultant & period.
3. Input pay rate, hours, and taxes.
4. PayPilot auto-calculates **Gross**, **Net**, and **Profit**.
5. Mark as *Paid* or *Pending*.

Generate **Payout PDF** for recordkeeping.

## 4.5 Employee Transactions

For internal staff salary processing:

- Go to **Employee Transactions** → **Add Entry**.
- Enter gross, tax %, and net salary.
- Attach payment proof if needed.

Reports exportable in both USD and INR.

## 4.6 Advances

Use this to manage loans/advances to consultants or employees.

- Record amount, currency, and purpose.
- Mark as *Paid* or *Recovered.*
- Track balance and generate monthly summaries.

## 4.7 Immigration Tracking

**H-1B Management**

- Add new case → Consultant → Filing Date → Receipt Number → Status (Filed / RFE / Approved).
- Upload USCIS documents.

**Green Card Management**

- Enter PERM, I-140, I-485 case details.
- Track statuses and key dates.
- Export reports for legal audits.

> *Audit Tip:* Use “Export All” before attorney audits for instant case summaries.

### 4.8 File Repository

Centralized file system categorized by **Consultant, Client, or Employee.**
You can:

- Upload invoices, receipts, or case files.
- Search by keyword or file type.
- Auto-generate missing files (PDF).

# 5. Automation & Reporting

- **PDF/CSV Exports:** Every module supports export for audit or integration.
- **Automated Reminders:** Set alerts for overdue invoices or missing timesheets.
- **Profitability Dashboards:** Compare consultant costs vs. billing in real time.
- **Audit Logs:** Track all system activity with timestamps.

# 6. Integrations & Add-Ons

Available under **Settings** → **Integrations.**

- **Accounting:** QuickBooks, ADP, Gusto (via API key).
- **Email:** SMTP or Gmail/Outlook.
- **Vendor Portal:** Secure client-side access for invoice approval.

# 7. Data Security & Compliance

PayPilot is **GDPR-ready** and follows **U.S. Labor & IRS guidelines**.
All sensitive data:

- Encrypted at rest (AES-256).

- Encrypted in transit (TLS 1.3).
- Stored in Supabase with role-level security.

*Audit Tip:* Always download quarterly compliance exports for external audits.

# 8. Support & Troubleshooting

## 8.1 FAQs

- Forgot Password → Use “Forgot Password” link on login screen.
- Invoices not sending → Check SMTP integration.
- Consultants missing → Verify import format.

## 8.2 Contacting Support

📧 prajam@atekit.com
🕐 Response SLA: Within 4 business hours.
📞 Premium clients: Dedicated Slack or Teams support channel.

# 9. Best Practices

- Review dashboards weekly.
- Run monthly profitability and immigration compliance reports.
- Train consultants to submit timesheets before Friday EOD.
- Use “Overdue Invoice” widget daily.

# 10. Appendices

## B. Sample Import Templates

- `Consultants.csv`

- `Timesheets.csv`
- `Invoices.csv`

### C. Workflow Cheat Sheets

Visual diagrams showing the:

- Consultant Lifecycle
- Invoice → Payout Flow
- H-1B/GC Case Flow

### D. Implementation Timeline (90-Day Rollout)

| Phase | Duration | Focus |
|---|---|---|
| Days 1-2 | Setup | Company settings, users, security |
| Days 3 | Training | Finance & HR onboarding |
| Day 4 | Live | Consultants & invoices go live |

## End Note

This workbook was designed to guide you from **Day 1 setup to full automation** in PayPilot.
For any assistance or custom implementation support, contact:
📧 **prajam@atekit.com**
🌐 **www.paypilot.app**