Onboard to paiyroll® with Claude

Start here · https://paiyroll.com/kb/onboard-to-paiyroll-with-claude/

An assistant for your onboarding

Claude is an AI assistant from Anthropic. It can read the paiyroll® support articles, and guide you through your onboarding one step at a time. You can ask it questions in your own words, for example "How do I import my payroll?"

Claude reads the support articles through the paiyroll® connector. You add the connector to Claude once. Claude then finds the articles which answer your question, follows their steps, and gives you their links.

A free Claude account is sufficient for questions, and can add one connector. For a full onboarding, we recommend Claude Pro. A free account has a message limit, which a long onboarding can reach. Claude Pro has a higher limit.

Before you start

Do not give Claude employee data, for example names, NI numbers, pay or bank details. Claude does not need this data to guide you. Enter employee data only in paiyroll®.

The connector reads only the published support articles. It cannot see your payroll, your employees or your paiyroll® account.

What you type into Claude goes to Anthropic, the company that makes Claude. Anthropic's terms and privacy policy apply to it, not those of paiyroll®.

Get Claude

1. Go to claude.ai, and create a free account.
2. Download the Claude app for your computer or phone, and sign in. You can also use Claude in your browser at claude.ai.

Add the paiyroll® connector

1. In Claude, click **Customize**, then click the **Connectors** tab.
2. Click **+ Add**, then **Add custom connector**.
3. In **Name**, enter **paiyroll**.
4. In **MCP server URL**, enter **https://paiyroll.com/wp-json/paiyroll-docs/v1/mcp**
5. Click **Continue**.
6. Under **Authentication**, make sure that **No sign-in** is selected. Claude selects it for you, and shows **Detected**.
7. Click **Add**. Claude shows "You're not connected to paiyroll yet."
8. Click **Connect**. Claude shows "Connected to paiyroll." and two **Read-only tools**.
9. For **Read-only tools**, change **Needs approval** to **Always allow**. Claude then reads the articles without asking you each time.

At step 6, Claude warns that anyone with the server URL can use this connector. This is correct, because the support articles are public.

Start your onboarding

1. In Claude, click **New**.
2. Type: **Onboard me to paiyroll®.** You can also ask any question about paiyroll®.
3. Answer the questions from Claude, and follow its steps in paiyroll®.

If something in paiyroll® is not as Claude says, open the link of the support article that Claude used, and follow that article.

Troubleshooting

Claude does not use the support articles

You see an answer which does not name a paiyroll® support article.

Cause: The connector is off in this chat.

Remedy: In the message box, click **+**, then point to **Connectors**, and turn on **paiyroll**. Then ask your question again.

Add custom connector is grey

You click **+ Add**, and **Add custom connector** is grey.

Cause: A free Claude account can have only one custom connector, and your account already has one.

Remedy: Remove the other custom connector: click it, click **...**, then **Remove**. Or upgrade your Claude account.

You are out of free messages

You see "You are out of free messages until" and a time.

Cause: A free Claude account has a message limit. A long onboarding can reach it.

Remedy: Wait until the time that Claude shows, then continue in the same chat. To prevent this, upgrade to Claude Pro, which has a higher limit.

Next steps

- Import your payroll
- FPS Import Guide
- Alternative ways to import