File by FIFO — Admin Setup Checklist

Complete this checklist to fully configure your organization

Account Setup

- ☐ **Logged in successfully** with provided credentials
- ☐ **Changed password** to something secure and memorable
- ☐ **Verified email address** (check for verification email)

Organization Details

- ☐ **Company name** is correct in settings
- ☐ **Company logo** uploaded (PNG or JPG, recommended 200x80px)
- ☐ **Contact information** entered (address, phone, email)
- ☐ **Industry sector** selected (helps with compliance recommendations)

Department Structure

- ☐ **All departments created** with correct names
- ☐ **Department heads identified** for each department

Common departments to add:

Department	Notes
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Operations	Main workforce
Administration	Office staff
Sales	Sales team
Finance	Accounts, payroll
Human Resources	HR team
IT / Technology	Tech support
Logistics	Warehouse, drivers
Customer Service	Support staff

Employee Data Import

Before Import

- ☐ **Employee list exported** from current system (payroll, Excel, etc.)
- ☐ **Data cleaned** and formatted for import
- ☐ **Required fields** present for each employee:
    - First name
    - Last name
    - ID number
    - Email address (or phone number for WhatsApp)
    - Department
    - Start date

CSV Import Process

- ☐ **Downloaded template CSV** from File
- ☐ **Mapped columns** correctly
- ☐ **Test import** with 3–5 employees first
- ☐ **Full import** completed
- ☐ **Verified** employee count matches expected number

Phone Number Formatting

SA phone numbers are automatically formatted: - 0821234567 → +27821234567 - +27821234567 → +27821234567 (unchanged) - 27821234567 → +27821234567

Manager Accounts

Identify Managers

- ☐ **List of HOD Managers** (department managers who will issue warnings)
- ☐ **List of HR Managers** (HR staff with organization-wide access)
- ☐ **Executive users** (business owners/directors for oversight)

Create Manager Accounts

For each manager: - [ ] **Account created** (either new user or promoted from employee) - [ ] **Role assigned** (HOD Manager, HR Manager, or Executive) - [ ] **Departments assigned** (for HOD Managers) - [ ] **Invitation email sent** and confirmed received - [ ] **Manager logged in** and tested access

Manager Role Summary

Role	Sees	Can Issue Warnings	Can Edit Employees
HOD Manager	Their team only	Yes (their team)	No
HR Manager	All employees	Yes (all)	Yes
Executive	All employees	No	No (read-only)

Warning Categories

- ☐ **Reviewed default categories** (Attendance, Conduct, Performance, etc.)
- ☐ **Added custom categories** if needed for your industry
- ☐ **Removed irrelevant categories** (optional)

Common categories included: - Attendance and Punctuality - Workplace Conduct - Performance Standards - Health and Safety - Insubordination - Gross Misconduct

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PDF Template Customization (Optional)

- ☐ **Logo uploaded** to appear on warning documents
- ☐ **Company name** correct on PDF header
- ☐ **Brand colours** set (optional)
- ☐ **Preview tested** — generated a test PDF to check appearance

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Historical Warning Entry (If Applicable)

If you have existing warnings from before using File:

- ☐ **Gathered existing warning documents**
- ☐ **Entered historical warnings** (available for first 60 days)
- ☐ **Verified dates** are accurate
- ☐ **Linked to correct employees**

Note: Historical warnings don't go through the full wizard—they're simplified entries for record-keeping.

Go-Live Checklist

Before rolling out to all managers:

Technical Readiness

- ☐ **All managers have accounts** and can log in
- ☐ **All employees are in the system**
- ☐ **Departments are correctly structured**
- ☐ **Test warning issued successfully** and PDF looks correct

Training Readiness

- ☐ **Manager training scheduled** or materials distributed
- ☐ **HR team briefed** on new process
- ☐ **Support contact** shared with all users

Communication

- ☐ **Announcement sent** to managers about new system
- ☐ **Go-live date** communicated
- ☐ **Old process retired** (stop using Word templates, etc.)

Post Go-Live Verification

After first week of use:

- ☐ **All managers logged in** at least once
- ☐ **First real warnings issued** successfully
- ☐ **No access issues** reported
- ☐ **PDFs generating** correctly
- ☐ **Delivery working** (email, WhatsApp, or print)

Support Contacts

Issue	Contact
Technical problems	support@fifo.systems

Issue	Contact
Training questions	support@fifo.systems
Billing queries	support@fifo.systems

Maintenance Tasks (Ongoing)

Monthly

- ☐ Review warning statistics
- ☐ Check for overdue follow-ups
- ☐ Verify new employees are added
- ☐ Remove departed employees

Quarterly

- ☐ Review manager access (remove leavers)
- ☐ Check department structure still accurate
- ☐ Review warning categories for relevance

Annually

- ☐ Renew subscription
- ☐ Update company details if changed
- ☐ Major policy changes? Update categories

Setup complete? You're ready to protect your business with proper disciplinary documentation!

Questions? Email support@fifo.systems