File by FIFO — Quick Start Guide

Get up and running in 30 minutes

Before You Start

You'll need: - Your login email and password (sent in your welcome email) - A list of your departments - Your employee list (names, ID numbers, contact details)

Step 1: Log In (2 minutes)

1. Go to **https://file.fifo.systems**
2. Enter your email address
3. Enter your password
4. Click **Sign In**

You'll land on your dashboard. If you're a Business Owner, you'll see the Executive Management dashboard.

Step 2: Quick Tour of Your Dashboard (3 minutes)

What You'll See

Greeting Section Your name and role, with today's date.

Metrics Cards Quick stats—these will populate as you add employees and issue warnings.

Quick Action Buttons - **Issue Warning** — Start the disciplinary wizard - **HR Meeting** — Book a meeting with HR - **Report Absence** — Log employee absences - **Recognition** — Acknowledge good work

Tabs/Navigation Access to different sections like Employees, Departments, and Settings.

Step 3: Add Your First Department (3 minutes)

1. Click the **Departments** tab
2. Click **Add Department**
3. Enter the department name (e.g., "Sales", "Operations", "Admin")
4. Click **Save**

Tip: Start with your main departments. You can add more later.

Suggested starting departments: - Operations - Administration - Sales - Finance - HR

Step 4: Add Your First Employee (5 minutes)

Option A: Add One Employee

1. Click the **Employees** tab
2. Click **Add Employee**
3. Fill in the required fields:
    - First name
    - Last name
    - ID number (SA ID)
    - Email address
    - Phone number (for WhatsApp delivery)
    - Department
    - Start date
4. Click **Save**

Option B: Import from CSV (for bulk upload)

1. Click the **Employees** tab
2. Click **Import Employees**
3. Download the template CSV
4. Fill in your employee data
5. Upload the completed CSV
6. Review and confirm the import

Tip: SA phone numbers are automatically formatted (e.g., 0821234567 becomes +27821234567).

Step 5: Invite Your First Manager (5 minutes)

1. Click the **Managers** or **Users** tab
2. Click **Add Manager** or **Promote to Manager**
3. If the person is already an employee:
    - Search for their name
    - Select their role (HOD Manager or HR Manager)
    - Assign departments (for HOD)
    - Click **Promote**
4. If the person is new:
    - Enter their details
    - Select their role
    - They'll receive an invitation email

Manager Roles: - **HOD Manager** — Manages a specific department, issues warnings to their team - **HR Manager** — Sees all employees, reviews warnings, handles escalations

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Step 6: Issue a Test Warning (10 minutes)

Let's walk through the warning wizard with a test case. You can issue this to yourself or use a test employee.

Start the Wizard

1. Click **Issue Warning** from your dashboard
2. The 10-phase wizard opens

Phase 1: Select Employee

- Search for the employee by name
- Click to select them

Phase 2: Category & Recommendation

- Choose a category (e.g., “Attendance and Punctuality”)
- The system will analyze and recommend a warning level
- Accept the recommendation or override with reason

Phase 3: Incident Details

- Enter when the incident happened (date and time auto-fill)
- Enter where it happened
- Describe what happened in detail

Phase 4: Employee Response

- Enter what the employee said when you discussed it
- This could be their explanation or acknowledgment

Phase 5: Expected Standards

- State the expected behavior clearly
- Reference company policy if applicable

Phase 6: Improvement Plan

- Add commitments the employee is making
- Set timelines for each commitment
- Choose a follow-up review date

Phase 7: Review

- Check all the information is correct
- Go back to any phase to edit if needed

Phase 8: Script & PDF Review

- Read the warning script (choose language if needed)
- Preview the PDF document
- Acknowledge you’ve reviewed everything

Phase 9: Signatures

- Sign as the manager
- Show the employee the PDF preview
- Employee signs
- Optional: Add a witness signature

Phase 10: Delivery

- Choose how to deliver:
  - **Email** — Send PDF to employee’s email
  - **WhatsApp** — Share link via WhatsApp
  - **Print** — Download PDF for physical handover
  - **QR Code** — Employee scans to access

Done!

The warning is now saved to the employee’s record and can be accessed anytime.

Step 7: Verify Success (2 minutes)

Check that everything worked:

1. Go to **Employees** tab
2. Find the employee you issued the warning to
3. Click to view their profile
4. You should see the warning in their history

What’s Next?

Recommended Next Steps

1. **Add all departments** — Complete your organizational structure
2. **Import all employees** — Use CSV for bulk upload
3. **Invite all managers** — Give HODs access to manage their teams
4. **Customize PDF template** — Add your company logo (Settings)
5. **Review warning categories** — Ensure they match your policies

Get Help

- **Email:** support@fifo.systems
- **In-app:** Click the help icon on any screen

Training Resources

- Demo script for managers
- HOD Manager training guide
- FAQ document

Quick Reference

Task	Where to Find It
Add employee	Employees tab → Add Employee
Add department	Departments tab → Add Department
Issue warning	Dashboard → Issue Warning
View warning history	Employees → Select employee → View history
Export reports	Reports tab → Export
Change settings	Settings tab

You're ready to go! Start documenting properly and protect your business.

Questions? Email support@fifo.systems