Client Onboarding Form

FILE by FIFO — Setup Information

Complete this form so we can configure your account

Company Information

Company Details (as they will appear on warning documents)

Field	Details
Company Name	_____
Trading Name (if different)	_____
Physical Address	_____
City, Province	_____
Phone Number	_____
Email (for documents)	_____

Company Logo

Please email your company logo to: **support@fifo.systems**

Logo Requirements: - Format: PNG or JPG - Minimum size: 200 x 200 pixels - Recommended: 400 x 400 pixels - File name: [CompanyName]-logo.png

Status	Tick
Logo sent via email	[ ]
Will send separately	[ ]
No logo (use text only)	[ ]

Administrator Account

This person will have full access to configure and manage the system

Field	Details
Full Name	_____
Email	_____
Phone	_____
Position/Title	_____

Department Structure

List all departments in your organization

#	Department Name	Head of Department (if known)
1	_____	_____
2	_____	_____
3	_____	_____
4	_____	_____
5	_____	_____
6	_____	_____
7	_____	_____
8	_____	_____

Add more departments during setup if needed

Manager Accounts

List managers who will be issuing warnings

#	Full Name	Email	Department	Role (HR/HOD)
1	_____	_____		_____
2	_____	_____		_____
3	_____	_____		_____
4	_____	_____		_____
5	_____	_____		_____

Role Types: - **HR** = Can see all employees, manage all warnings - **HOD** = Can only see and manage their department

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Employee Data

Data Import Method

Method	Tick
We will provide a CSV file	[ ]
We will enter employees manually	[ ]
We need help entering data	[ ]

If providing CSV

Required columns: - First Name - Last Name - Employee Number (optional) - Department - Email (optional) - Phone (optional) - Start Date (optional)

We will send you a template spreadsheet

Approximate Employee Count

Field	Details
Total Employees	_____

_____

Setup Call Scheduling

Preferred Times

Day	Tick	Preferred Time
Monday	[ ]	_____
Tuesday	[ ]	_____
Wednesday	[ ]	_____
Thursday	[ ]	_____
Friday	[ ]	_____

Your timezone: _____

Call Platform Preference

Platform	Tick
Google Meet	[ ]
Zoom	[ ]
Microsoft Teams	[ ]
Phone call	[ ]

_____

Special Requirements

Language Preferences

Primary warning language:

Language	Tick
English	[ ]
Afrikaans	[ ]
isiZulu	[ ]
Other: _____	[ ]

Custom Requirements

Anything specific we should know about your setup?

_____

_____

_____

_____

Questions for Setup Call

Write any questions you'd like answered during the setup call

1. _____

2. _____

3. _____

_____

Checklist (Internal Use)

Task	Status	Date
Order form received	[ ]	_____
Payment confirmed	[ ]	_____
Onboarding form received	[ ]	_____
Logo received	[ ]	_____
Account created	[ ]	_____
Departments configured	[ ]	_____
Manager accounts created	[ ]	_____
Employee data imported	[ ]	_____
Setup call completed	[ ]	_____
Client training completed	[ ]	_____
Go-live confirmed	[ ]	_____

_____

Return completed form to: support@fifo.systems

Questions? Contact support@fifo.systems

_____

File by FIFO — We'll have you up and running in no time