



# Welcome to Candoo Culture.

Here's how we get your people into the system so you can start receiving insights.

## Getting Started: Onboarding Your Team

### Step 1 - Complete the CSV File attached via email (Inputs):

- **Name** - First & Last
- **Email** - The email they'll use to log in
- **Team** - Each person must belong to a team (e.g. "Logistics, Warehouse, Operations or custom name")
- **Role** - Admin, Team Leader, or Individual

Roles explained:

**Admin** = Main system admin - Total access. All reporting viewable from individual to organisational level.

**Team leader** = Limited access. Direct line managers or Group management eg Sales manager / Marketing manager and/or Sales & Marketing Director.

**Individual** = Strict access. Any employee you wish to complete the survey.

- **Tags (optional)** - Labels for filtering (e.g. "Shift A", "Blue Team", etc)

*Tip: Each person can have multiple tags. Keep tags consistent - they don't affect reporting, just help you filter people in the dashboard.*

### Step 2 - Onboarding

[Video demo](#)

- Upload Your CSV
- Log into the portal.
- Go to Invites → Batch Upload.
- Upload your completed CSV file.
- Everyone in the file will receive their invite to log in.

### Step 3 - What You Get (Outputs)

- Individual Reports - Each person completes their survey.
- Team Reports - Team leaders see results for their team and each individual within it.
- Organisational Report - Admins see a full roll-up across all teams.