



Go-Live Master Guide

The complete walkthrough for setting up your platform during your preview window, from confirming your data to entering billing, so your team is ready for a smooth go-live.

Your five areas to set up

This guide walks through everything to do during your preview window. Work through the five areas below in order. Use the companion one-page checklist to track your progress as you go.

- 1 Confirm your data**
Check that Fundamentals, Kudos, Weekly Insights, and your roster all carried over.
- 2 Review your branding**
Logo, favicon, and brand colors, so the platform looks like your organization.
- 3 Update your communications**
Email templates and notification settings.
- 4 Confirm your people structure**
Locations, departments, and your employee roster.
- 5 Re-enter your billing information**
Required before go-live. It connects to the new payment system.

Data, branding & communications

Start with these three. Areas 2 and 3 have their own detailed how-to guides. This is the short version.

1

Confirm your data carried over

Everything transfers automatically from your current platform. Do a quick check that it all made it:

- **Fundamentals** are all present and correct
- **Kudos** history transferred
- **Weekly Insights** are there
- **Employee roster** looks complete

2

Review & update your branding

In **Settings**, make the platform feel like your organization:

- Upload your **logo** and **favicon**
- Set your **brand colors** (primary and secondary)
- Review content naming and feature toggles

Full walkthrough: the “Customizing Your Settings” guide

3

Update your communications

Tailor what your team receives:

- Review and update your **email templates** (send yourself a test)
- Review your **notification settings**

Full walkthrough: the “Setting Up Your Email Templates” guide

Set up locations & departments

Start by defining how your organization is organized, then you'll assign people to it.

1

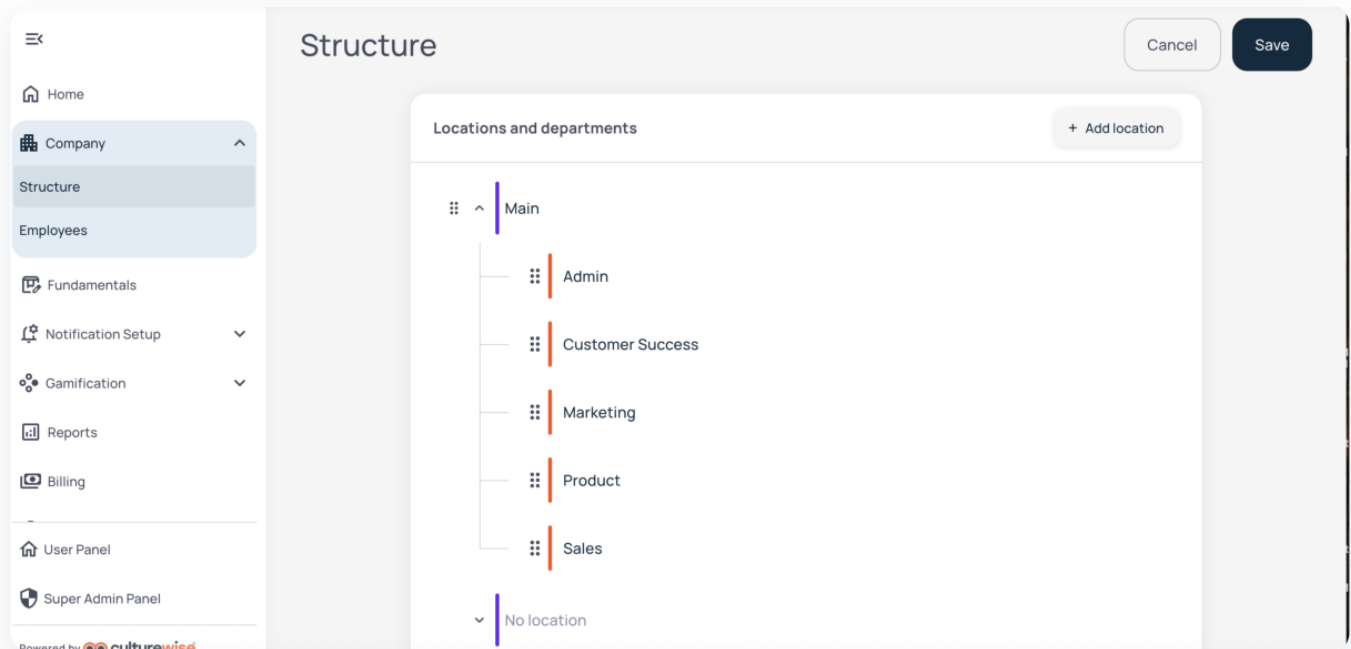
Open the Company menu

In the left-hand nav, click **Company** to reveal **Structure** and **Employees**.

2

Go to Structure

Select **Structure** to manage your locations and the departments nested under each. Use **+ Add location** to create locations, drag to reorder, then **Save**.



The Structure page: locations (e.g. “Main”) with departments nested underneath.

Review your roster

With your structure in place, confirm everyone is present and correct.

3

Open Employees

Under **Company** → **Employees**, review your roster. Each person has a location, department, role, and status.

The screenshot shows the 'Employees' page in the CultureWise system. On the left is a sidebar with navigation options: Home, Company (selected), Structure, Employees, Fundamentals, Notification Setup, Gamification, Reports, Billing, User Panel, and Super Admin Panel. The main content area is titled 'Employees' and includes a 'Bulk import' button, an 'Add employee' button, a 'Filters' button, and a search bar. Below these is a table with the following columns: First Name, Last Name (with an upward arrow), Location, Department, Role, and Status. The table lists 10 employees with their respective details and status tags (Registered, Pending review, or Archived). Each row has a three-dot menu icon on the right.

	First Name	Last Name ↑	Location	Department	Role	Status	
ⓘ	Michele	Barry	—	—	Employee	Registered	⋮
ⓘ	Solomiia	Bonetska	—	—	Admin	Pending review	⋮
👤	Dustin	Campbell	📍 Main	📁 Admin	Manager & Admin	Registered	⋮
ⓘ	Candace	Coleman	📍 Main	—	Manager	Archived	⋮
👤	Al	Curnow	📍 Main	📁 Sales	Admin	Registered	⋮
ⓘ	Tim	Dromboski	📍 Main	—	Employee	Archived	⋮
ⓘ	Josh	Elmore	📍 Main	—	Employee	Archived	⋮
ⓘ	John	Farrelly	📍 Main	—	Employee	Archived	⋮

The Employees roster: name, location, department, role, and status.

Add someone new

Need to add a person who isn't on the list? Here's the one-at-a-time way.

4

Add an employee

Click **+ Add employee**, fill in their Basic Info (name, title, language) and at least one contact method (work email, personal email, or phone), then **Save**.

← Add employee

Cancel

Save



Profile picture
JPG or PNG · min 400×400 px · max 5 MB

Upload photo

Basic Info

First Name

Last Name

Title (optional)

Language ▾

Contact (at least one required)

Work Email

The Add employee form: Basic Info plus at least one required contact method.

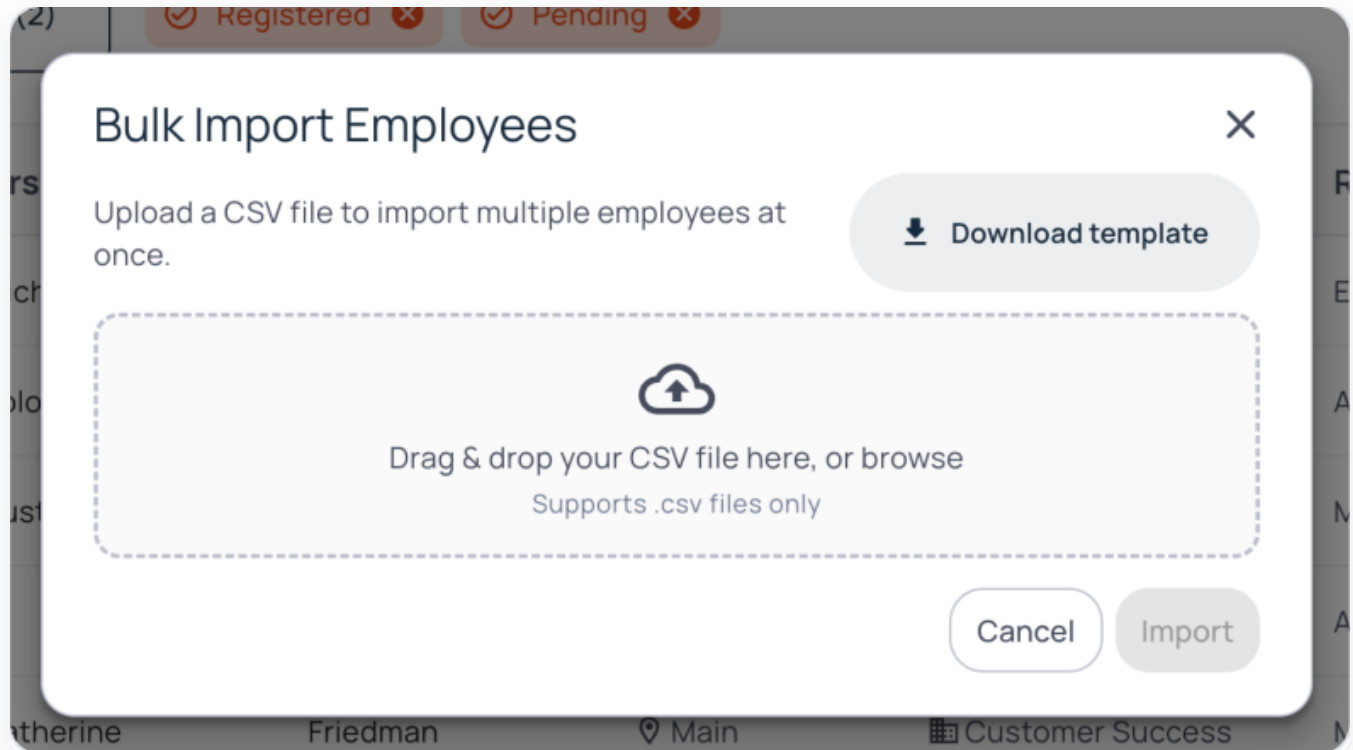
Import a whole list at once

Adding a lot of people? Use Bulk import instead of adding them one by one.

5

Open Bulk import & download the template

Click **Bulk import**, then **Download template** to get the correctly-formatted CSV.



The Bulk Import modal: download the template, then drag and drop your CSV.

6

Fill in the template & upload

Complete the columns (FirstName, LastName, EmailAddress, and UserType are required; Location, Department, and Cell Phone are optional), save as .csv, then upload it and click **Import**.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
1	FirstName	LastName	EmailAddress	UserType	Location	Department	Cell Phone (Optional)												
2	John	Doe	john@examp	Employee	New York	Engineering	315-555-0100												
3	Jane	Smith	jane@examp	Manager			315-555-0200												
4	Alex	Brown		Employee			607-555-0300												
5																			
6																			
7																			
8																			
9																			
10																			

The CSV template: required and optional columns with sample rows.

Verify & manage your roster

Before go-live, make sure everyone is assigned correctly.

7

Filter to spot gaps

Use **Filters** to narrow by location, department, role, and status. Applied filters show as chips you can clear individually. For example, check “Pending” to see who still needs to register.

The screenshot shows the 'Employees' management page. On the left, there's a 'Filters' sidebar with sections for 'Location and department' (Location: All, Department: All), 'Role' (All roles: All), and 'Status' (All statuses: Registered, Pending). An 'Apply' button is at the bottom of the filters. Above the table, there are two removable filter chips: 'Registered' and 'Pending'. A search bar labeled 'Search employee' is on the right. The table has columns: First Name, Last Name, Location, Department, Role, and Status. The status column shows 'Registered' in green and 'Pending review' in orange.

First Name	Last Name	Location	Department	Role	Status
Michele	Barry	—	—	Employee	Registered
Solomiia	Bonetska	—	—	Admin	Pending review
Dustin	Campbell	Main	Admin	Manager & Admin	Registered
Al	Curnow	Main	Sales	Admin	Registered
Catherine	Friedman	Main	Customer Success	Manager & Admin	Registered
Brittany	Friedman	Main	Customer Success	Manager & Admin	Registered
David	Friedman	Main	Sales	Manager & Admin	Registered
Jake	Friedman	Main	Operations	Manager & Admin	Registered

Filters applied (Registered and Pending) shown as removable chips.

8

Edit, archive, or remove

Each row's **:** menu lets you **Edit** a person's details, **Archive** them, or **Delete** them.

This screenshot shows a close-up of the employee list. A vertical menu is open for the row of 'David Friedman', showing three options: 'Edit' (pencil icon), 'Archive' (archive box icon), and 'Delete' (trash can icon).

The per-employee menu: Edit, Archive, or Delete.

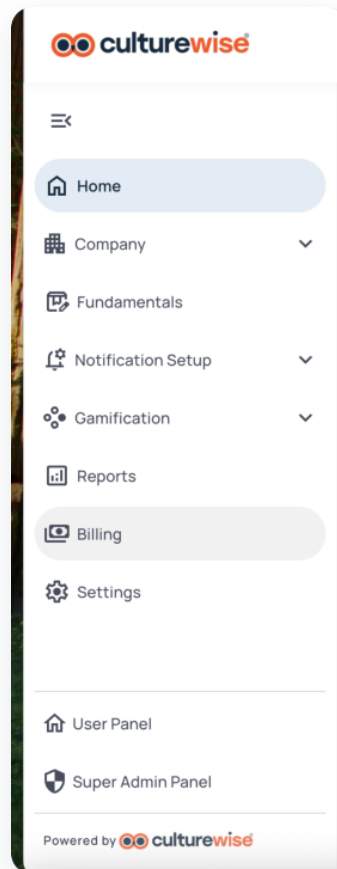
Re-enter your billing information

This connects to our new payment system and is required before your team can go live.

1

Open Billing

In the left-hand nav, click **Billing**.



Billing in the left-hand navigation.

2

Review your plan & enter payment

Review your plan summary (your monthly total reflects your organization's seats), then securely enter your payment details to activate your subscription.



Billing / payment screenshots to be added

(Stripe checkout visuals, to be inserted after editing)

That's your go-live setup

Once you've worked through all five areas, your platform is set up and ready for your team.



Track your progress with the companion **Go-Live Admin Checklist**, and remember that billing must be completed before go-live.



Knowledge base

Short walkthrough videos for each area of this guide.



FAQ

Answers to the most common questions we're hearing.

Questions?

Your CultureWise team is always here to help. Reach out anytime.