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.

POWERED BY CULTUREWISE

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**

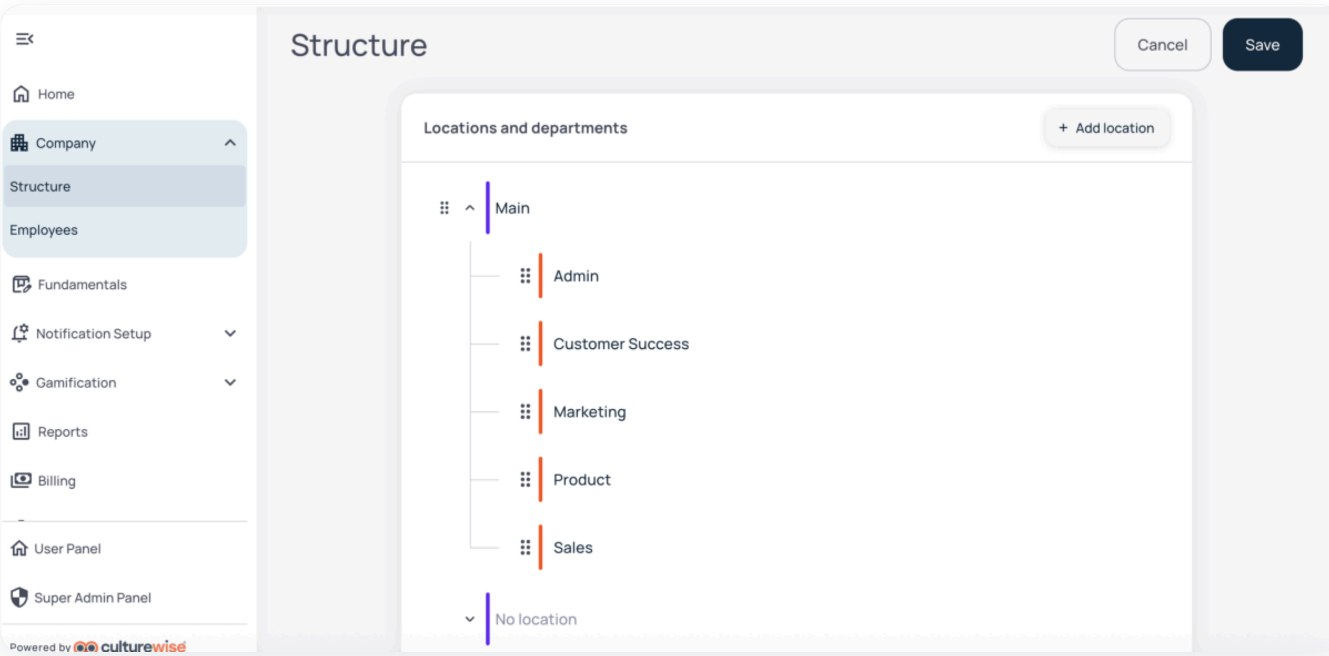
Full walkthrough: the "Setting Up Your Email Templates" guide

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**.



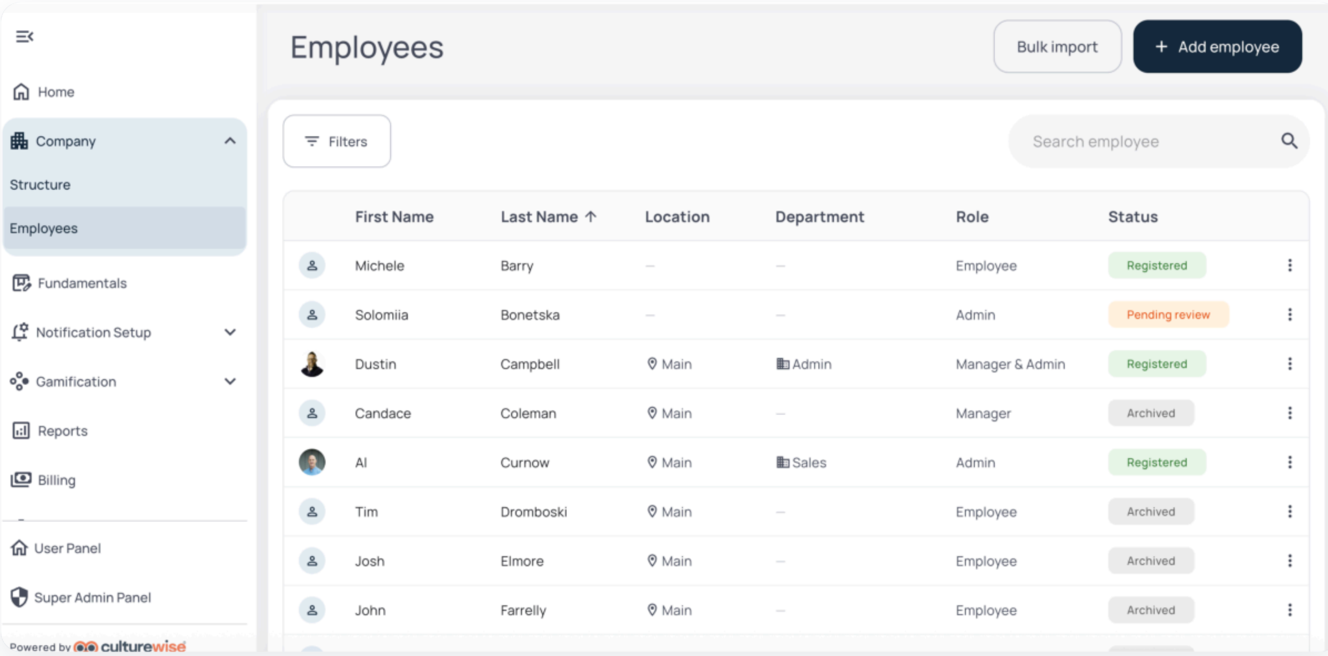
The Structure page: locations (e.g. "Main") with departments nested underneath.

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.



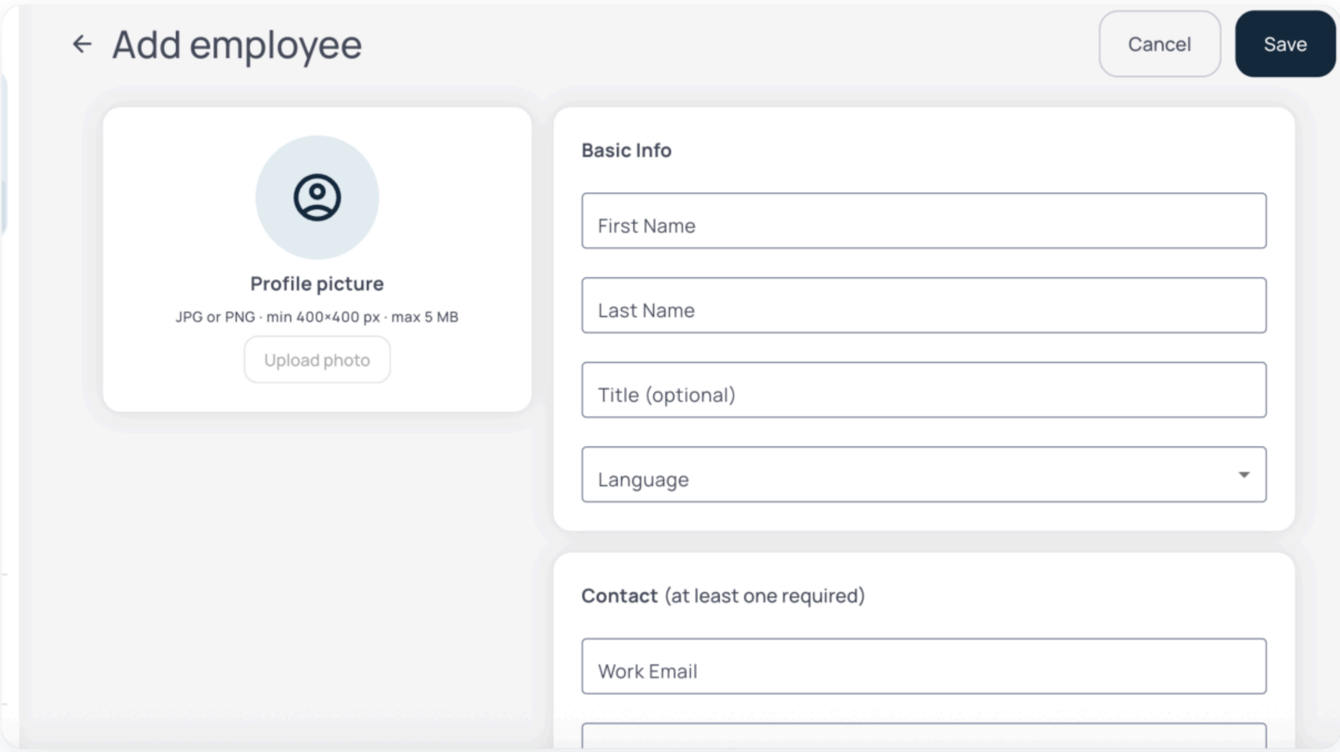
The Employees roster: name, location, department, role, and status.

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**.



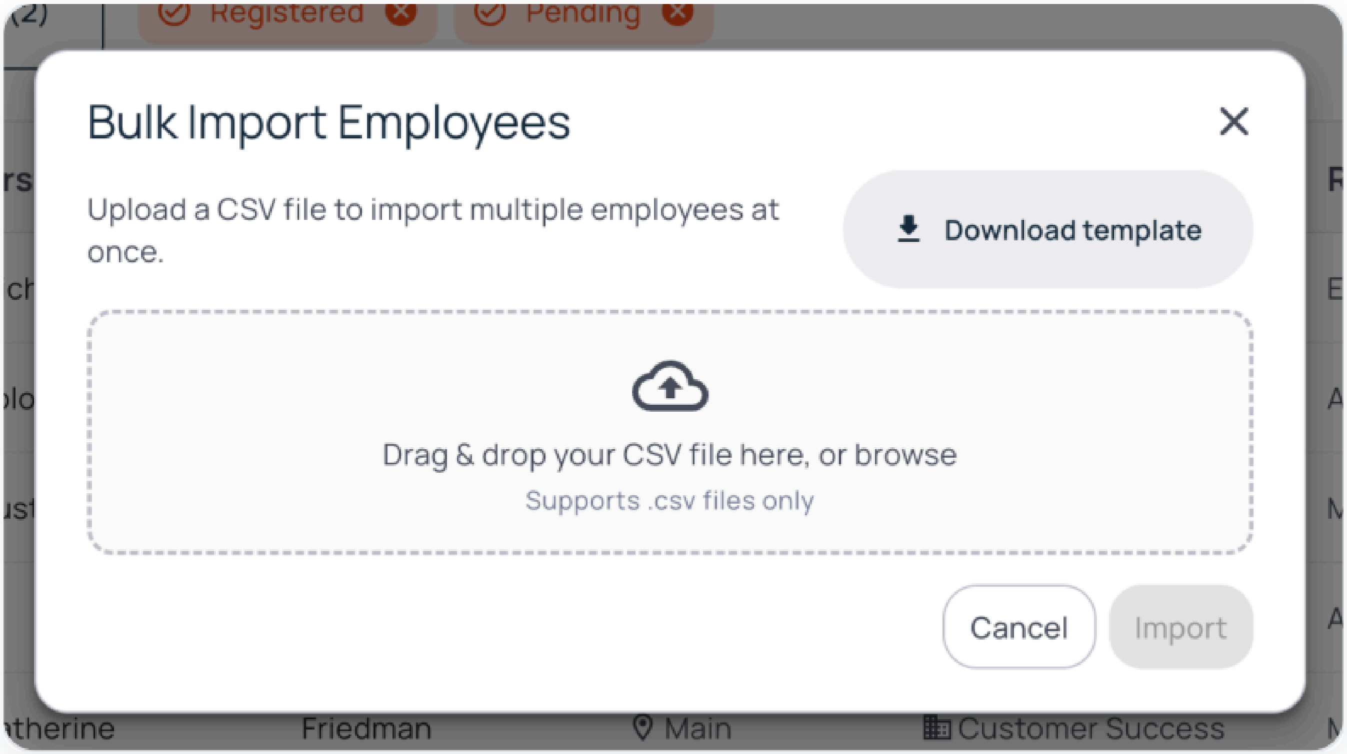
The Add employee form: Basic Info plus at least one required contact method.

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**

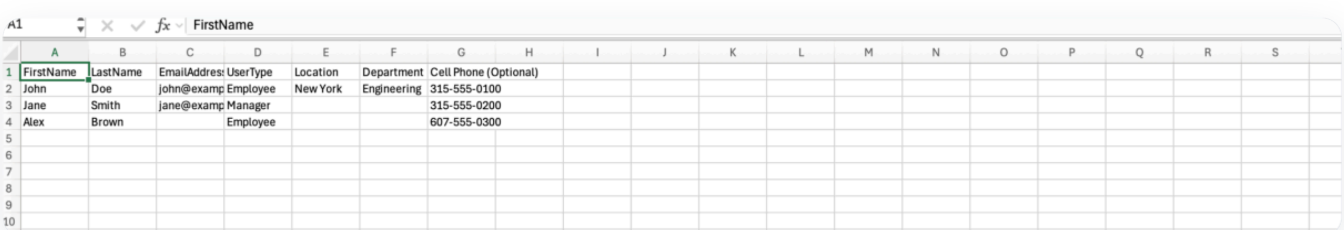
Click **Bulk import**, then **Download template** to get the correctly-formatted CSV.



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**.



FirstName	LastName	EmailAddres:	UserType	Location	Department	Cell Phone (Optional)
John	Doe	john@examp	Employee	New York	Engineering	315-555-0100
Jane	Smith	jane@examp	Manager			315-555-0200
Alex	Brown		Employee			607-555-0300

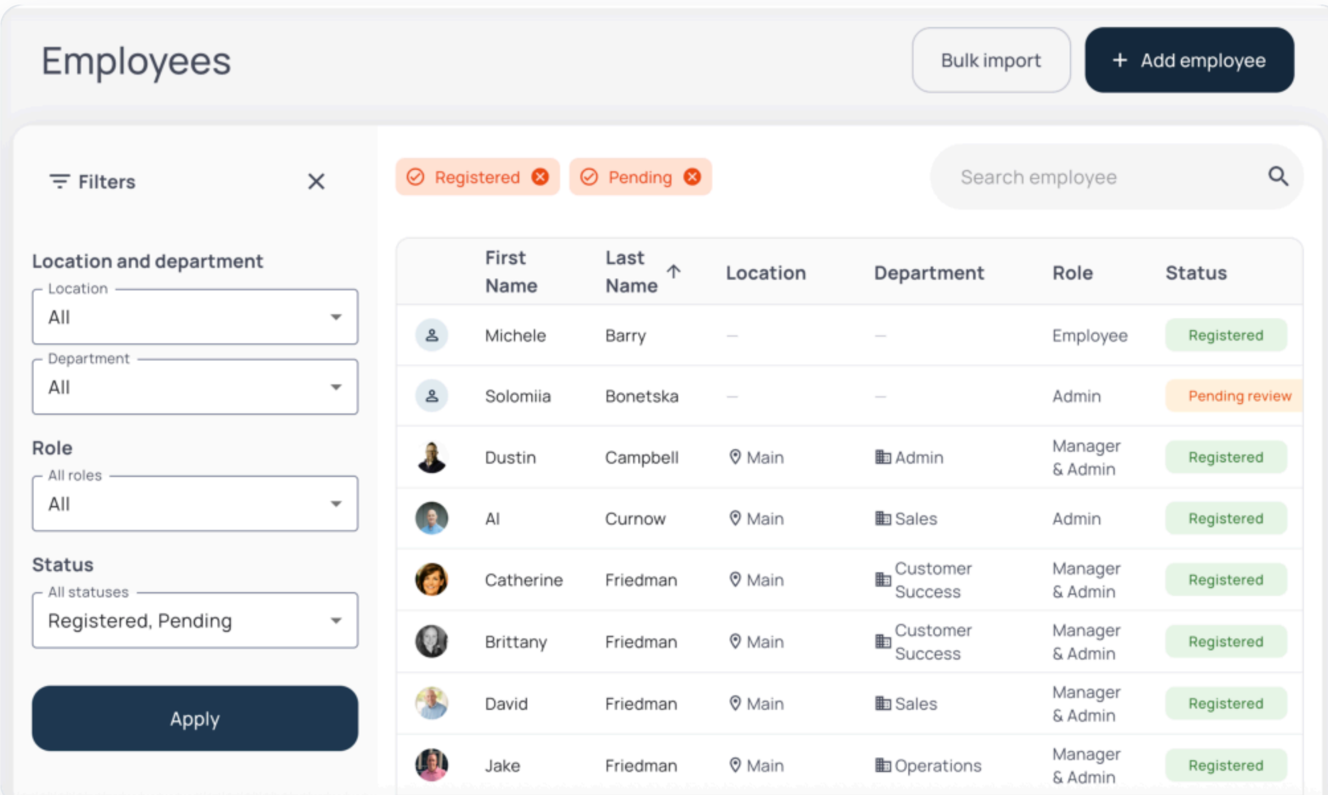
The CSV template: required and optional columns with sample rows.

Verify & manage your roster

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

7 Filter to spot gaps

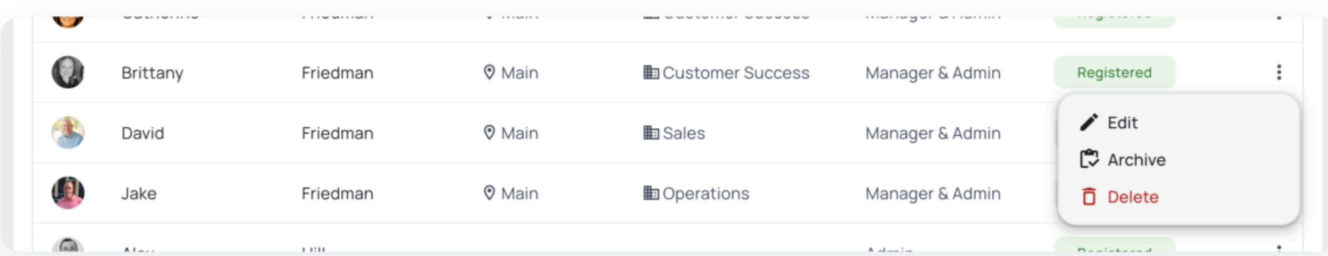
Use **Filters** to narrow by location, department, role, and status. Applied filters show as chips you can clear individually. For example, check “Pending” to see who still needs to register.



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.



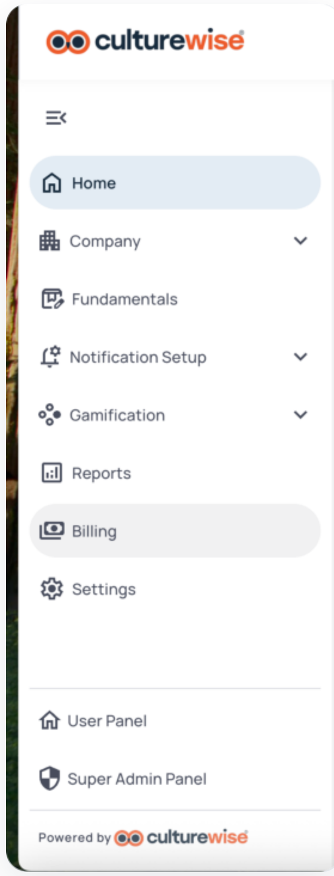
The per-employee menu: Edit, Archive, or Delete.

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.

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FAQ
Answers to the most common questions we're hearing.

Questions?

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