StaffUnity™

New Account Startup

1. Log in to your Admin Website using the username and password that was emailed to you when your new account was created. It is recommended that you change the temporary password by visiting the **Main Admin Settings** page and clicking the *Change Password* link just below the Admin Username label in the *Admin Settings* section. The admin contact should be the only employee who has this password.
2. From the **Main Admin Settings** page, select the desired options for the account in the *Meeting/ Match Settings* section. Be sure to select a Meeting Location that is easily accessible to all employees, and if possible, has a microwave available for employees who wish to bring their own lunch. Leave the Master Switch set to *Off* for now. Click *Update Settings.*
3. On the same page, fill in the *Admin Settings* section. Admin Contact is the name of the designated employee who will run the system. The address entered in the Send Email field is the address displayed in all employee emails sent from the system. Click *Update Settings.*
4. Still on the same page, enter your employees into the system from the *Upload Employee Database* section. Instructions can be found by clicking the question mark next to the title. If there are any problems, you will be directed to an error page listing any employees that were not added and the reasons why. Employees also can be added one at a time by visiting the **Employees Alphabetical** page, but you will need to enter at least one Department into the system first.
5. After uploading the database, check the **Departments** page to make sure all departments were set up correctly. If necessary, delete any duplicates that may have occurred from misspellings.
6. Visit the **Future Events** page. Check to make sure none of the scheduled meeting dates conflict with any company events or holidays. If they do, visit the **Exclusion Days** page to fix any problems.
7. Go back to the **Main Admin Settings** page and turn the Master Switch to *On.* Click *Update Settings.*
8. Visit the **Templates** page. There will be a green box next to the Welcome Email form. After sending and approving a test welcome email, click the button to send the one-time welcome to all employees.
9. The system is now set and will run automatically from this point on. Employees will receive an email on the next scheduled invite date. The Admin Contact will receive an email letting them know that the invite has gone out and a new round has started. New/old employees should be added/deleted, as needed.
10. If you have any questions, please visit the *Frequently Asked Questions* section on our **Tech Support** page (the link can be found at the bottom of every page) or click one of the question marks next to any item in the Admin Website for answers to specific questions. If you can't find the answer you are looking for or need to contact us for any reason, please submit a support request, and a Customer Support Representative will get back to you as soon as possible.

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