

# Getting Started Check List

Todo	Explanation
Set up roles	To create manager-level recognition, you need to make roles, visit <b>Menu &gt; Company Admin &gt; Roles</b> to create a manager or director role. Once your users are imported you can add roles in the Accounts section.
Customize badges	<b>Company Admin &gt; Custom Badges</b> is where you can upload your own badges or use one of the 30 out of box. Keep in mind, once a badge is sent it can't be converted back or forth to a nomination badge. Once there are recognitions associated with a badge you can't delete the badge. You can disable any badge at any time. By enabling a badge a <b>Nomination badge</b> it will go straight to admins for review and no points will be assigned.
Set up rewards	What kind of rewards do you want to offer? We recommend enabling rewards in a month or more to first create a culture of recognition. Even if disabled for the end user, the admins can setup non-monetary, company-fulfilled rewards. Talk to Recognize about utilizing our gift cards or Recognize-fulfilled rewards.
Add users	If your company has AD Azure, Office 365, or Yammer, then you can use our <b>user sync</b> feature in <b>Company Admin &gt; Settings</b> . In that settings section, you can also enable SAML for SSO. Other options include spreadsheet import. Email your spreadsheet of users to <a href="mailto:support@recognizeapp.com">support@recognizeapp.com</a> or to request a spreadsheet template. Manually insert user information, assign managers, roles, birthday, and other settings on the <b>Company Admin &gt; Accounts</b> section. We recommend not using Internet Explorer for the Company Admin and especially not in the Accounts section.
Review settings	As mentioned above, <b>Company Admin &gt; Settings</b> needs a close look to ensure all settings are correct. Things like privacy, message requirement, activation of features are all inside the Settings list.
Achievement badges	Is there any training, community service, or finite abilities your staff can achieve? If so, enable the achievement badge setting in the <b>Company Admin &gt; Custom Badges</b> . These will be listed in an Achievement section inside the <b>user's profile</b> .
Posters, desk cards, & events.	Kick off the recognition program with an announcement from the leadership. Add desk cards (email us for a Sketchapp template) or make your own posters. Kicking off the program with a "Appreciation Week" really helps to make Recognize one part of an overarching strategy.
Invite users	You can invite users into the system by going to <b>Company Admin &gt; Accounts</b> . Click the top right choice for inviting users. You can email all your users depending on state, team, or role.
Teams	Teams can come through automatically as AD Groups or Yammer Groups via user sync. Otherwise, create teams by spreadsheet import or manually in <b>Menu &gt; Team Directory</b> .
Enable kiosk	Set a password in <b>Company Admin &gt; Settings</b> for a special web address. Email it to any colleague who has a digital signage TV to display a stream of recognitions.