SHEETY ONBOARDING

Bulk Upload Guide

Everything you need to format, validate, and submit a bulk hire CSV.

How it works

The bulk upload flow has three steps: upload your CSV, review the hire list and pricing, then pay once via Stripe Checkout. After payment, documents are generated for each hire and emailed to each manager. Managers with multiple hires receive one email with all their documents attached.

> **NOTE**
> Minimum 3 hires per order. If a manager has more than 15 hires, their documents arrive in multiple emails labeled Part 1 of N, Part 2 of N, and so on. You are CCd on every manager email as a backup copy.

CSV structure

Your file must be a standard comma-separated values (.csv) file with a header row as the first line. Column names are case-insensitive but must be spelled correctly. Extra columns are ignored.

Example rows (required columns only):

new_hire_name	role_name	company_name	plan_tier	manager_email	submitter_email
Jane	Marketing Coordinator	Acme Corp	Basic	manager@acme.com	hr@acme.com
Tom	Senior Engineer	Acme Corp	Premium	eng@acme.com	hr@acme.com

Required fields

Every row must have all six of these. Rows missing any required field are flagged in red on the review screen and cannot be submitted until corrected.

Field	Req	Type	Description
`new_hire_name`	**Yes**	*Text*	First name of the new hire. Used throughout the onboarding document to address them directly.
`role_name`	**Yes**	*Text*	Job title or role. Appears in the document header and intro.
`company_name`	**Yes**	*Text*	Company or organisation name.

Field	Req	Type	Description
`plan_tier`	**Yes**	*Enum*	Must be exactly: **Basic**, **Premium**, or **Ultimate**. Case-insensitive.
`manager_email`	**Yes**	*Email*	Email address of the hiring manager. Documents are sent here. Hires sharing a manager email are grouped and sent together.
`submitter_email`	**Yes**	*Email*	Backup contact for receiving documents in case of a manager email typo. Also receives the order confirmation summary and is CCd on every manager email.

Optional fields

These fields enrich the generated documents. Omitting them is fine. All are included in the CSV template.

Contact and branding

Field	Req	Type	Description
`department_name`	**No**	*Text*	Team or department. Shown in the document header.
`manager_name`	**No**	*Text*	Manager first name or full name. Used in the manager email salutation.
`manager_phone`	**No**	*Text*	Manager phone number. Included in the contact section of documents.
`onboarding_partner`	**No**	*Text*	Name of the hire's onboarding buddy or contact person.
`partner_email`	**No**	*Email*	Onboarding buddy email. Shown in the document contact section for the hire's reference. Not CCd on any emails.
`partner_phone`	**No**	*Text*	Onboarding buddy phone.
`onboarding_tone`	**No**	*Enum*	Document tone. Options: **relaxed and direct**, **professional but friendly** (default), **formal and structured**.
`accent_color`	**No**	*Hex*	Brand colour as a 6-character hex code with no # symbol. Example: `2ec97e`. Defaults to Sheety green.
`logo_url`	**No**	*URL*	Direct URL to the company logo image. Used in the document header. Must be a direct, publicly accessible URL ending in .png or .jpg. SVG is not supported.

Role context (improves document quality)

Field	Req	Type	Description
`role_tasks`	No	*Text*	Key responsibilities for the role. Used in milestone 1.
`tools_text`	No	*Text*	Tools or software the hire will use. Populates the tool activation milestone.
`challenges_text`	No	*Text*	Common early challenges for this role.
`onboarding_approach`	No	*Text*	How the team prefers to onboard new hires.
`success_signal`	No	*Text*	What success looks like at 30/60/90 days.
`confidence_method`	No	*Text*	How confidence is measured or demonstrated.
`growth_areas`	No	*Text*	Areas for development. Used in the Ultimate tier growth plan.
`development_plan`	No	*Text*	Formal development plan details. Ultimate tier only.

Tier reference

Tier	Price	What you get
Basic	$69 per hire	Hire roadmap PDF. Five-milestone onboarding structure.
Premium	$119 per hire	Hire roadmap PDF + Leader Guide PDF. The leader guide mirrors the five milestones with manager focus points.
Ultimate	$159 per hire	Everything in Premium plus a growth plan, development track, and confidence assessment — included in the leader guide.

PRICING NOTE
Bulk discount applied automatically: 10% off for 3+ hires, 15% off for 20+ hires, 20% off for 50+ hires. Applies to the whole order. Coupon codes can be applied at checkout for additional discounts.

Tone reference

The `onboarding_tone` field accepts one of three exact strings. Case-insensitive.

Field	Req	Type	Description
`relaxed and direct`	Option	*casual*	Conversational and approachable. Good for startups and informal cultures.
`professional but friendly`	Option	*standard*	Warm but structured. The default if this field is left blank.

Field	Req	Type	Description
`formal and structured`	Optio n	*formal*	Corporate register. Best for regulated industries or traditional organisations.

Common mistakes

INVALID TIER

plan_tier must be exactly Basic, Premium, or Ultimate. Values like "basic tier", "PRO", or "standard" will fail validation.

HEX FORMAT

accent_color should be a 6-character hex code with no # symbol. Correct: 2ec97e. Incorrect: #2ec97e.

LOGO URL

logo_url must be a direct, publicly accessible image URL. Google Drive share links and Dropbox preview links will not work. Use a direct image URL ending in .png or .jpg. SVG is not supported and will be silently skipped.

SUBMITTER EMAIL

All rows in a single CSV should share the same submitter_email.

ACCURACY NOTE

The review screen only flags missing or invalid required fields. It does not check for spelling errors or incorrect data. Double-check all entries for accuracy before submitting, especially names, roles, and email addresses.

Step-by-step walkthrough

1 **Download the CSV template**

Go to onboarding.sheety.tools/bulk/ and click "Download CSV template". Open it in Excel, Google Sheets, or Numbers.

2 **Fill in your hire data**

Add one row per new hire. Complete all six required columns. Fill in optional columns where you have the information. More context produces better documents.

3 **Export as CSV**

Excel: File > Save As > CSV (Comma delimited). Google Sheets: File > Download > Comma-separated values. Confirm the file ends in .csv.

4 **Upload the file**

Drag and drop your CSV onto the upload area, or click "Choose file". The page parses your file in the browser. Nothing is sent to the server yet.

5 Review the hire list

The review screen flags rows with missing or invalid required fields in red. Fix any errors in your CSV and re-upload. It does not catch spelling mistakes or wrong email addresses, so double-check all entries carefully. The order summary shows the calculated total with any applicable discount.

6 Confirm and pay

Click "Confirm and Pay" to go to Stripe Checkout. Coupon codes can be applied on the checkout page. Payment is processed securely by Stripe.

7 Receive confirmation

After payment you are redirected back with a confirmation. Document generation starts immediately.

8 Documents delivered

Each manager receives one email with all their hires' documents attached. Managers with more than 15 hires receive multiple emails labeled Part 1 of N, Part 2 of N, etc. You are CCd on all manager emails and receive a final summary email once the full order is complete.

Questions? Email getsheetytools@gmail.com or reply to any order confirmation email.
onboarding.sheety.tools