

Quick Reference Guide (QRG): ADMIN SETTINGS



New to StrategyFrog? Use this guide to learn all the admin basics.

1 Set up your Organization

Explore the Admin Bar
Hop around to learn all the Administrative functions.

Enter information
Follow the fields; it's pretty easy.

Upload Users
Input them individually or as a large group

2 Manage Users

Set Permissions
Users can have different permissions in the system, like viewing all work or being able to edit all work

The screenshot displays the StrategyFrog Admin Settings interface. On the left is a dark sidebar with the user profile of Linda Smith (President) and navigation options: Home, Manage, Organization, Strategize, and Admin Settings (highlighted in green). The main content area is split into two panels. The top panel, 'Define Organization', contains fields for Organization Name (Centric Leadership Strategies), Organization Type (Non-profit), Address (111 Buble Drive), City (Bouldersdf), and State (CO). The bottom panel, 'Manage Users', shows a list of users with a search bar and a dropdown for roles. An 'Upload Users' modal is open, showing a table with columns for Name, Email, Permission, and Role. A message in the modal states: 'Your are using the Trial Version. There are 1 users added to the app.' Below this is a 'Do you agree?' checkbox and 'Previous' and 'Invite' buttons. A table below the modal lists users: Linda Smith, David Ellis, Yancy Lewis, Paul Miller, Mary Wooler, and Andi Bertelli, with their respective roles and a 'Modify' column with edit and delete icons.

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3 Manage Departments

Link Users to Departments
Establish your organization's departments and connect employees

The screenshot displays the 'Admin Settings' page with a sidebar on the left containing navigation options like 'Home', 'Manage', 'Organization', and 'Admin Settings'. The main content area is titled 'Manage Departments' and includes a 'Create a Department' button. A modal window is open for creating a new department, with fields for 'Name', 'Leader', and 'Parent Department'. A callout box points to the 'Manage Departments' link in the sidebar, and another points to the 'Create a Department' button. A third callout box points to the 'Create' button in the modal.

Member	Role	Item Owner
David Ellis	VP	Linda Smith
Linda Smith		

Department	Leader	Members
Marketing Department	[User Icon]	5
Finance Department	[User Icon]	4
	[User Icon]	1

Create a Department
Add your organization's departments

Improving Strategic Execution

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Set up your billing plan to manage your organization and its users

4 Select your Billing Plan

Manage your Billing
Select your billing plan and manage all your payment details.

Change your Billing Plan
Upgrade your plan as you add more users

Admin Settings

- Organization Settings
- Setup Organization
- Manage Departments
- Manage Users
- Subscription
- Billing**

Centric Leadership Strategies

- Home
- Manage
- Organization
- Strategize
- Admin Settings**

Billing

Select your billing plan and enter your payment details here

Teams or Small Organizations

Annual
6 of 99 users

\$ 18.99 Per User Month

Next estimated payment \$ 1367.28

Payment Details

Current Card VISA

Update Payment Details Delete Card

Name	Email	Role	Added	Status
-	randenviron@gmail.com	Team member	3/04/2021	Pending
-	joedonahue@gmail.com	IT Innovations	2/17/2021	Pending

Choose a Plan That Fits You

Monthly Billing Annual Billing

- Teams or Small Organizations**
\$ 18.99 Per User Month (Billed Annually)
0 to 99 users
- Medium Organizations**
\$ 17.99 Per User Month (Billed Annually)
100 to 499 users
- Enterprise Organizations**
Custom Pricing (Billed Annually)
500+ users

5 Update Payment Details

Update Payment Details
Add a new credit card or update your previous one

StrategyFrog
Collect card information
john.smith@abc.com

Card number
MM / YY CVC

Save