Quick Start — Overview (Admin)
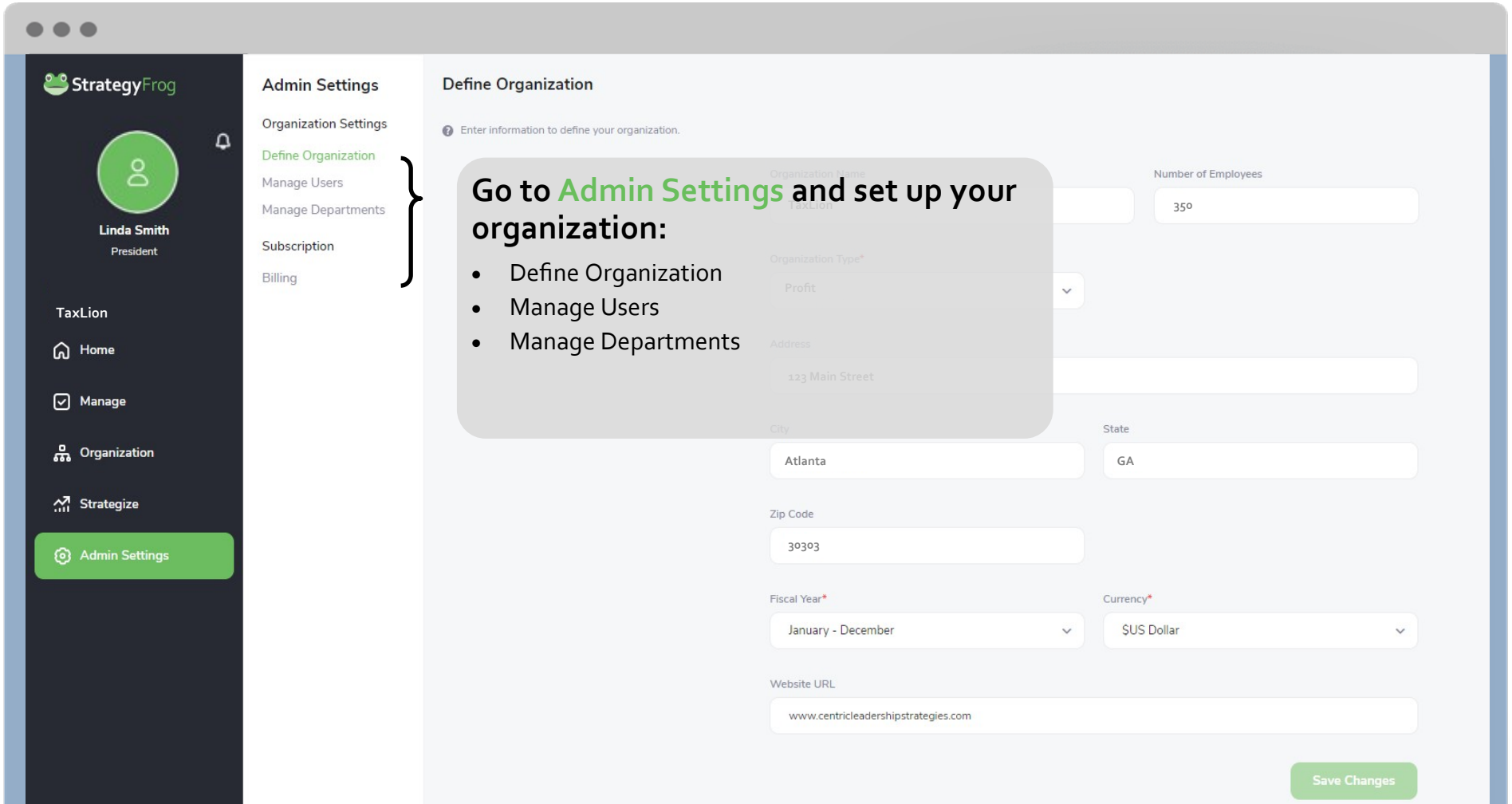
StrategyFrog

Welcome to StrategyFrog!

Getting started with StrategyFrog is as easy as **1-2-3!**

Step	What	Who	How
1	**Configure your Organization**	Admin	• **Go to Admin Settings** – Define Organization – Manage Users[1] – Manage Departments
2	**Complete your Subscription**	Admin	• **Go to Subscription**
3	**Build your Account Profile & use StrategyFrog**	You and All Users	• **Go to your Account Profile** • **Go to your Home, Manage, Organization**

[1]As an Admin, you will input the people in your organization who will establish your organization's strategy. In addition, you will add your organization's employees to execute and manage your organization's strategy.

1   Configure your Organization

Go to Admin Settings and set up your organization:

- Define Organization
- Manage Users
- Manage Departments

StrategyFrog

1 Configure your Organization: Manage Users

StrategyFrog offers your organization different user roles with varying permission levels and access to modules. As your organization's Admin, you will input employees into StrategyFrog.[1] Please refer to **Help** in StrategyFrog for more information.

StrategyFrog Modules

	Role	Description	Home	Manage	Organization	Strategize	Admin Settings
User Roles	**System Admins**	Have complete control over all features in the system; they can add new users and change existing user roles.	✓	✓	✓	✓	✓
	Tech Admins	Have complete control over all features in the system, except being able to modify System Admins; they can add new users and change existing user roles.	✓	✓	✓	✓	✓
	Strategy Planners	Have access to *Strategize*, and can also create Strategic Objectives and Strategic Initiatives, in addition to permissions granted to Managers.	✓	✓	✓	✓	
	Managers	Can see and makes changes to everything on the team, including objectives, key results, and tasks. The manager is responsible for helping define and achieve team outcomes.	✓	✓	✓		
	Regular Users.[2]	Can see team's objectives, workstreams, and tasks they have been given permissions to see. They can edit or remove any OKRs (Objectives, Key Results, or Tasks) they own or have delegated, but are unable to make changes to other people's workload.	✓	✓	✓		
	Viewers	Can see all the various elements of items in the system, however, they can only make changes and remove items they own or have delegated.	✓	✓	✓		

[1]Regardless of the role, all users, including Admins, should read **Quick Start Guide—All Users** to get started with StrategyFrog.
[2]Most users will be "Regular Users" for your organization in StrategyFrog.

2 **Complete your Subscription**

> **Go to Subscription and set up billing for your organization:**
> - Select plan
> - Update payment details

StrategyFrog

Linda Smith
President

TaxLion

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

Admin Settings

Organization Settings
Define Organization
Manage Users
Manage Departments
Subscription
Billing

Billing

Select your billing plan and enter your payment details here.

Teams or Small Organizations $ **18**.99 Per User Month

14 of 99 users   **Change Plan**

Next Estimated Payment
$ **3190**.32
On 2.20.2022   Cancel Subscription

Payment Details
Your card information is encrypted and securely kept in Stripe.

Update Payment Details   Delete Card

Current Card   **VISA**
**** **** **** 4242
11.2025

Users   Billing History (22)

Name	Email	Role	Added	Status
Joe Suthers	joe.suthers@taxlion.com	VP	12.21.2021	Pending
Toby Rose	toby.rose@taxlion.com	VP	12.17.2021	Accepted
Hank Jones	hank.jones@taxlion.com	VP	12.17.2021	Pending

Quick Start — Account Profile (Admin)

StrategyFrog

3 **Build your Account Profile and use StrategyFrog[1]**

Build your Account Profile by clicking the empty profile picture.
- Add your picture
- Customize your time zone
- Add your email
- Add your phone numbers
- Set your notifications

[1]Please read **Quick Start Guide—All Users** to get started with StrategyFrog.