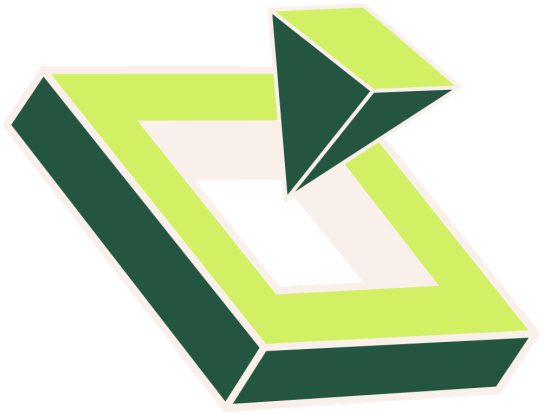
Activation Guide

your first steps in FROGED



—Your checklist—

Nº	Item	Done?
1	Creation of FROGED account	☐
2	Subscription activation (“billing”)	☐
3	Complete installation	☐
4	Invite agents	☐
5	Creation and import of contact attributes	☐
6	Creation and import of account attributes	☐
7	Event creation (triggers)	☐
8	Full site customization (branding and contents)	☐
9	Email domain configuration **(Scale)**	☐
10	Creation of user dynamic segments **(Scale)**	☐
11	TIPS: start getting value out of FROGED	☐

1. Creation of FROGED account.

If you haven't created a FROGED account yet, register here as an admin user and create your own workspace:

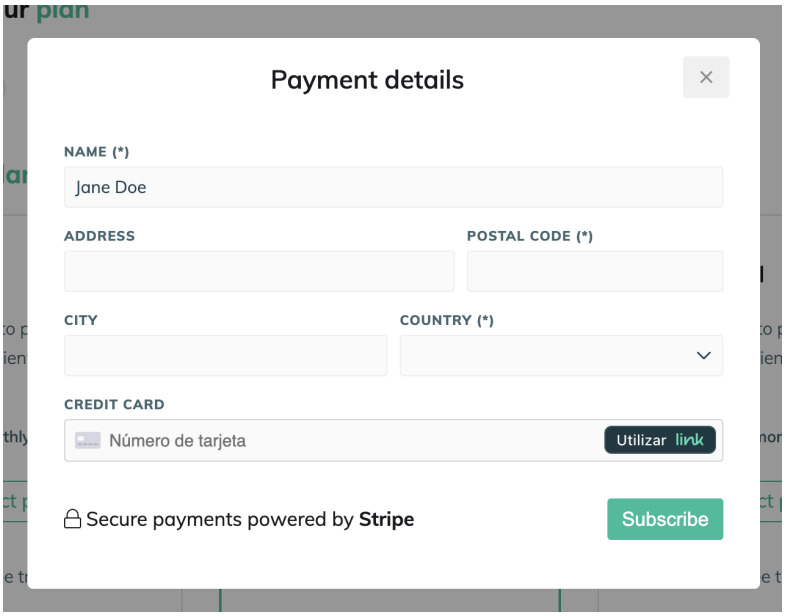
REGISTER here: https://app.froged.com/signup

Once your access is ready, verify the account from the automatic email received. Check your Spam and remove FROGED from your Spam folder just in case.

2. Subscription activation ("Billing").

In order to start your "Free trial" period, it is necessary to select a paid plan (otherwise you will not be able to try this free version). To do this, you will need to enter a card number for the desired subscription payment (plan and periodicity - yearly or monthly: with or without VOICE CALLS).

Select the plan with the settings you want, fill in the required fields and enter a card number for future payments.After the trial period, your subscription will automatically renew according to the plan you've selected. If you wish to discontinue, please remember to cancel before the renewal date. For any questions or assistance with cancellation, feel free to contact us.



3. Complete installation.

Here's the documentation you need to share with your technical team: How to install FROGED with a Script. It will only take a few minutes and you only need to read the instructions. If you need assistance, please don't hesitate to contact us.

Important! Install the script and the SET, since SET is what makes that everytime a new person registers:

-They register in your app and the contact gets created in FROGED too
-The information of your users is always updated (automatically and in real time)

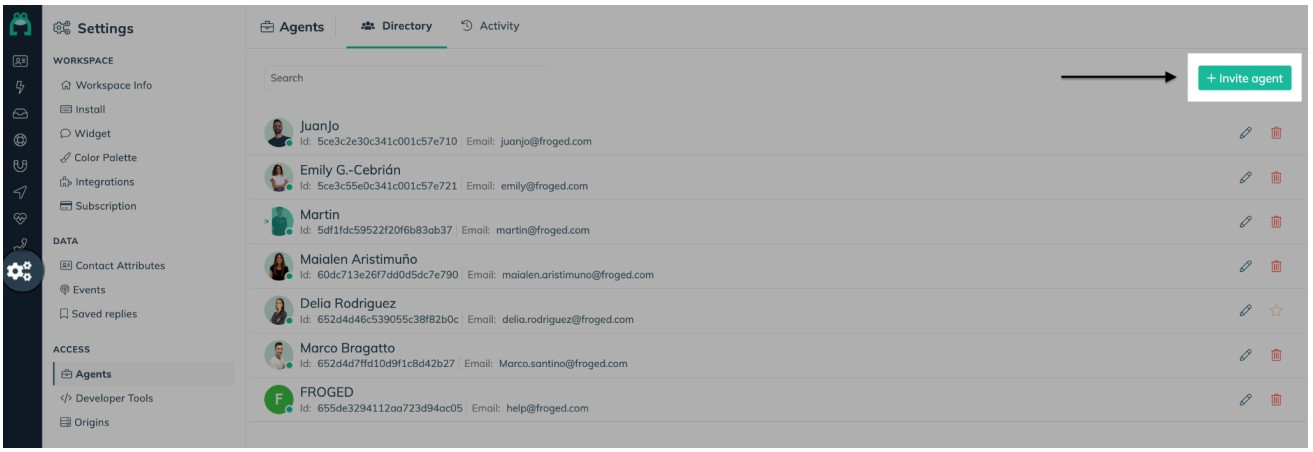
You'll find all the relevant information here, under the section "SET": SDK Javascript . This part of the installation is key for user identification and the correct performance of many functionalities.

4. Invite agents.

In order to invite other agents (colleagues) and give them access to your FROGED workspace, the admin user only needs to go to **Settings** > **Agents** and click on **+ Add agent.**

The UserID would be the FROGED email name for this agent. For example, the UserID could be name.surname > > name.surname@froged.mail.com

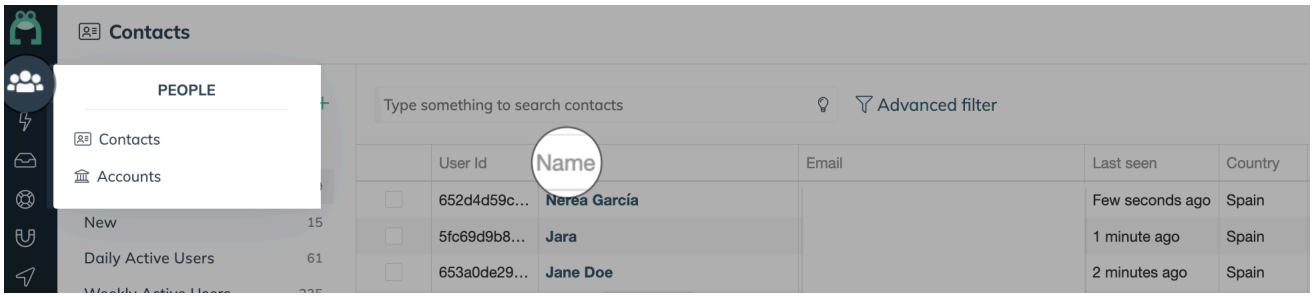
Find **here** all the information about managing agent permissions and types of access:



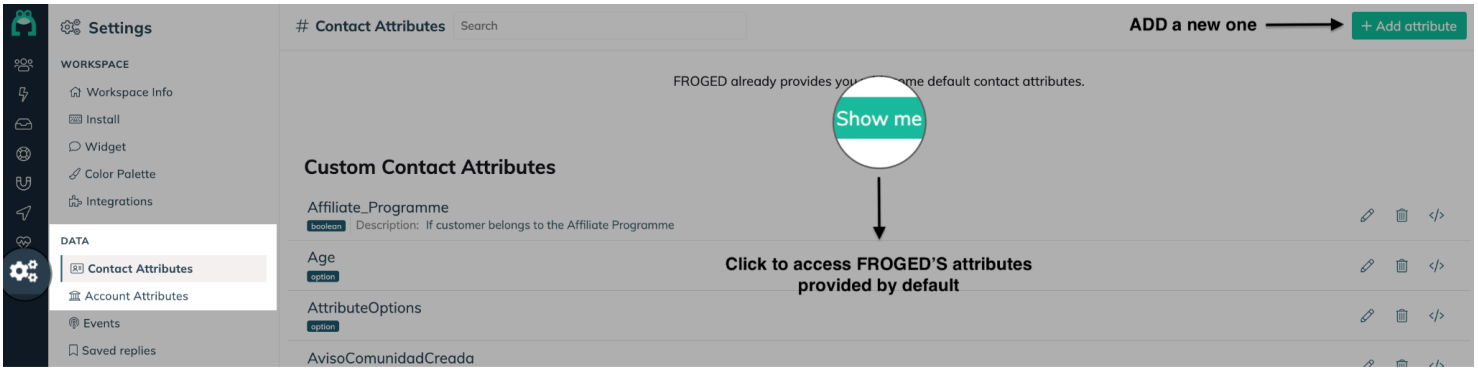
5. Creation and import of contact attributes.

The attributes are user characteristics, information that you either manually or automatically pass on to FROGED. Eg. name, surname, email, country, type of plan, etc.

These attributes feed into the client/user record within your contact database in FROGED ("Data Warehouse"). All attributes as Email, Name, etc, are viewable in a column format within menu **People** > **Contacts** / **Accounts**:



To add new contact attributes, you must do it from: **Settings** > **Contact Attributes** / **Account Attributes** >**+Add attribute**:

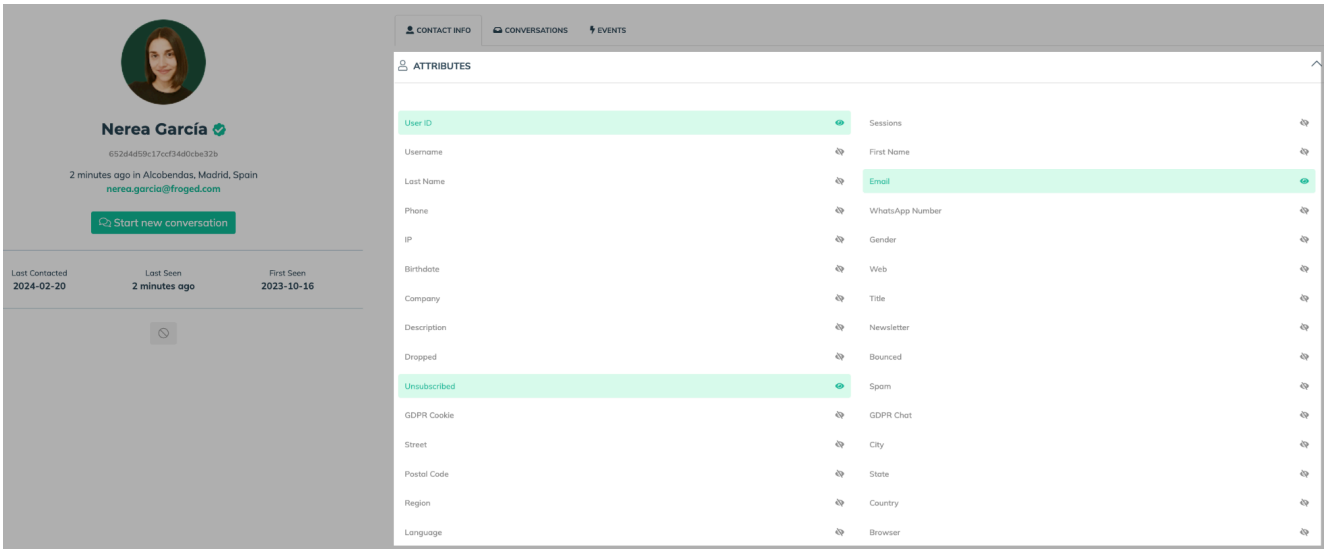


Check this article for more information on types of attributes and how to create them: Attributes.

Once your attribute is created, it's important that we know where it will appear and how to organize your workspace in FROGED's contact database.

Moreover, if you want that from now onwards the info between your system and FROGED gets automatically updated, you need to have the "SET" correctly installed. This part should have been configured during the installation. For further info read section "SET" in this article: SDK Javascript.

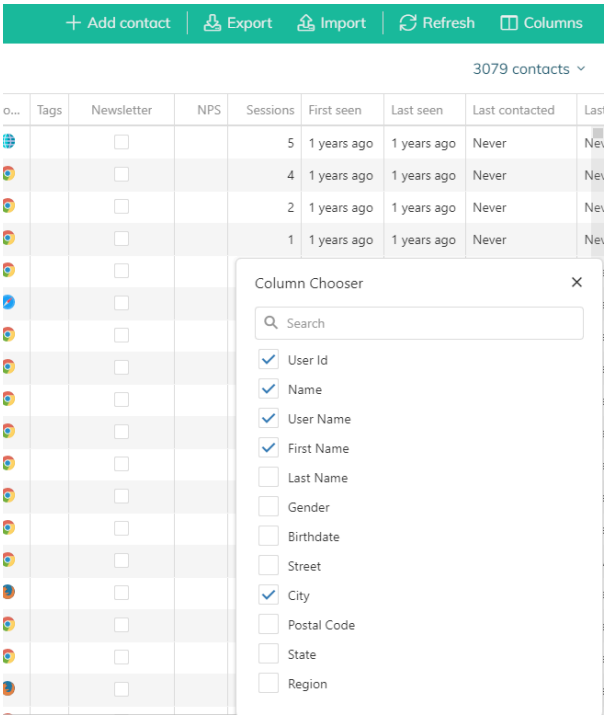
5.1 Visualize attributes in the client's contact record.



In this section you can choose what attributes you want and which ones you don't, by managing their **visibility**.

5.2 Visualize attributes in columns within FROGED's contacts database

Location: on the right side of your data warehouse > Click on "**Columns**" and select one by one, all the columns that you want to visualize.

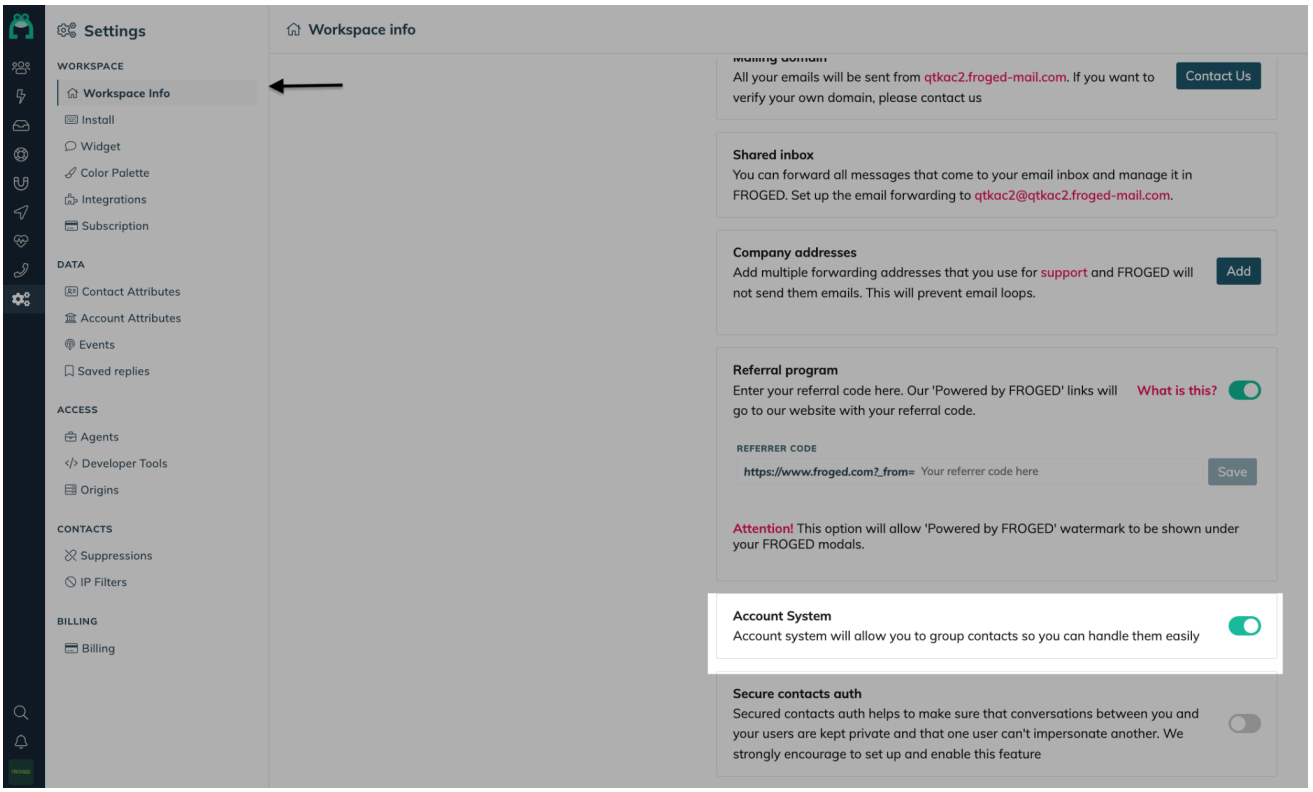


6. Creation and import of account attributes.

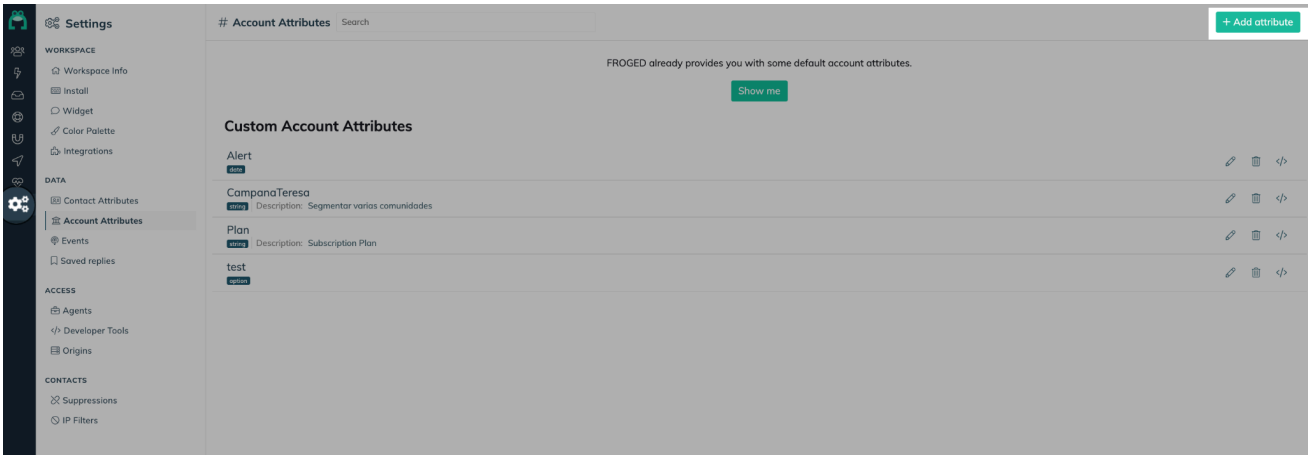
"**Accounts**" are a level above contacts. They are specially designed for B2B companies, so if you are one this should be of interest to you!

If you want to group users ("contacts") within a company or account, you should create Accounts and Account attributes. Eg. Users 1, 2, 3 are from the same customer company, and they will be grouped together under the same account ("Account 1"). For further information about accounts, check this document: What are Accounts?

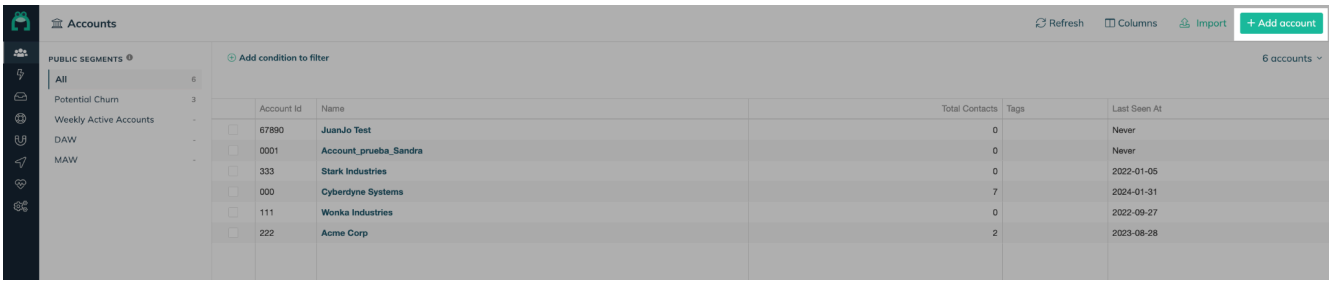
If you can't see Accounts within the module "**People**", you can activate this option from Settings, or ask your admin user in FROGED to activate this for you.



You can create Account attributes from **Settings** > **Accounts Attributes** (same process as contact attributes):



And if you want to import them, you should do it from “People > Accounts > Import”:



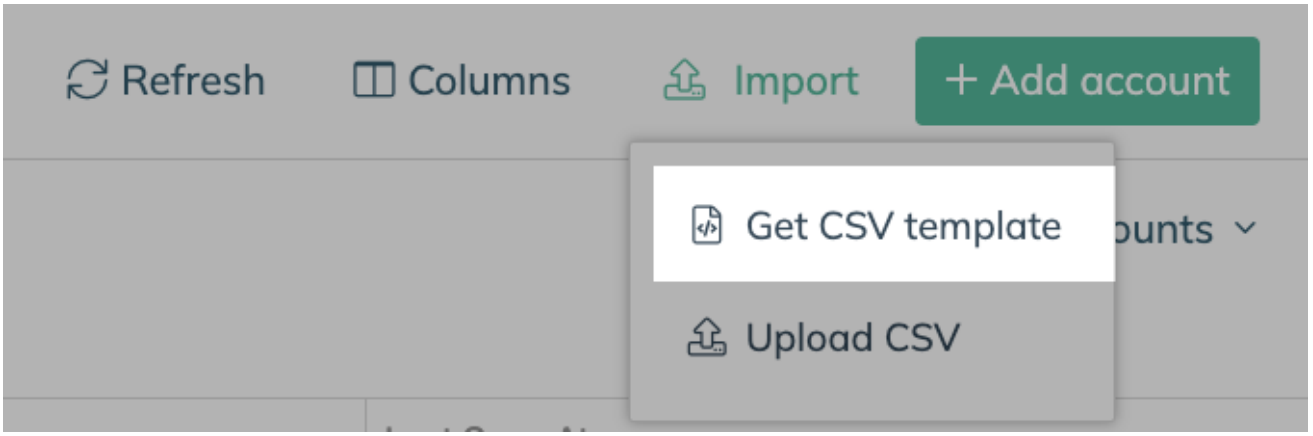
It’s very important that account attributes are created before the import process starts.

FROGED’s accounts are automatically taken from your system/platform. This is configured during the installation. In case you want to run an import because this information is located somewhere else and it’s not saved in the system that is connected to FROGED (eg. Pipedrive, Hubspot, etc) you need to do the following:

1. Create account attributes in FROGED
2. Prepare a CSV with the company name in your system and the ID (identity code), so both can get related since the attributes collected by your system automatically will populate straight away, as well as its associated contacts/users.

FROGED accounts are automatically collected from your system/platform. This is done during installation. If you want to import the information from somewhere else and it is not stored in your system connected to FROGED (e.g. Pipedrive, Hubspot, etc.), you would have to do it this way:

Tip! It's better to use FROGED's template for the import. It's available in **Import** > "**Get CSV template**":



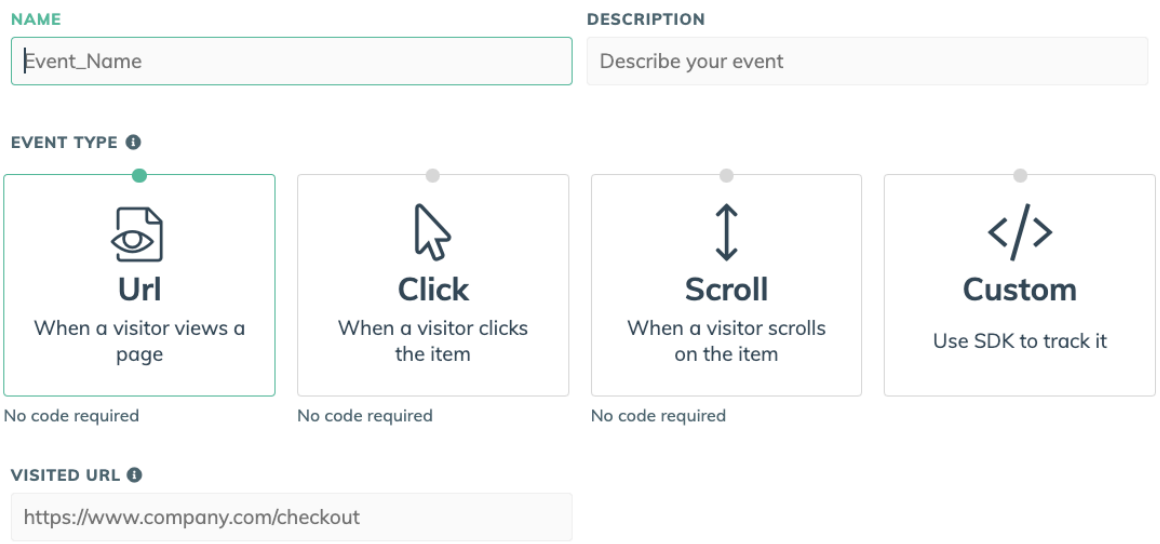
Therefore, you need to create a CSV, with the identifier and the different columns with the different attributes that you wish to import from your CRM or other system.

1. Event creation ("Trigger"):

FROGED events are actions that a user does on your platform (Eg. log-in/log-out, click on a specific element, etc). All information regarding events is: HERE

Value: It's important to know what your users do and don't do in your platform, so you can create engagement, onboarding or activation flows afterwards. Events or triggers are your best allies to measure your users behavior within your platform.

FROGED also offers a series of predefined events. Find all info HERE



There's 4 types of events: click, scroll and url events, which are very simple to create and do not require technical knowledge; and the customized events which are code events done through the SDK (coordinate with your IT team about it). All info HERE

Suggestion: create 3-5 events that your users need to run to find value within your solution. Eg: sign-up, profile creation, trial-end, document created, event performed, etc.

2. Site customization (branding and content):

FROGED offers the possibility of customizing both the aspect of its elements (knowledge base, widget, etc) as well as off-the-shelf content that saves you time in customer support.

3. Email domain configuration *(Only from Plan Starter onwards)*

Check the following instructions: Shared Inbox

FROGED offers also the possibility of having a custom domain to send emails. In order to get this, please contact our team through our Support chat or via your Customer Success Manager.

4. Creation of dynamic segments *(Only from Plan Starter onwards)*

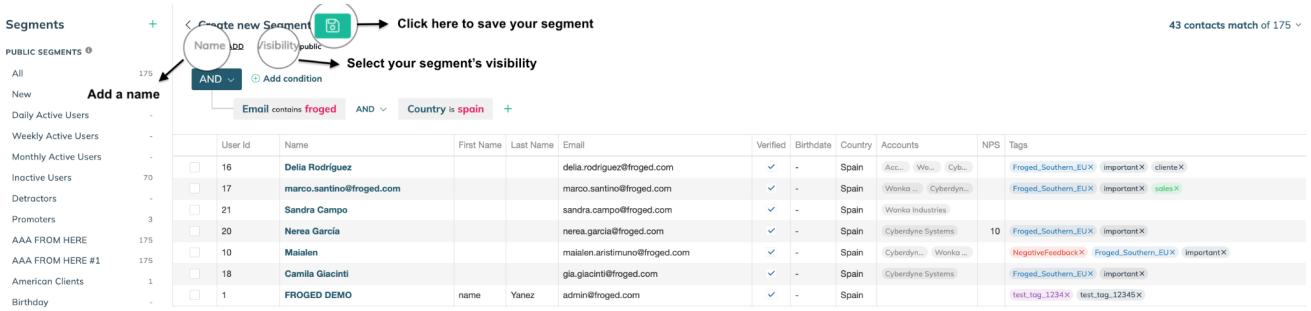
Segments are user groups with certain characteristics (attributes). They're useful to segment your audience very simply. This way, you can hiper-personalize all your communications in FROGED very easily, and also monitor those segments closely within "Contacts".

Value: Segmentation offers great value to your business since they let you group a group of users that meet certain criteria, not only attributes related to the contact (location, plan, user type, etc) but also actions they perform or don't perform in your platform (events).

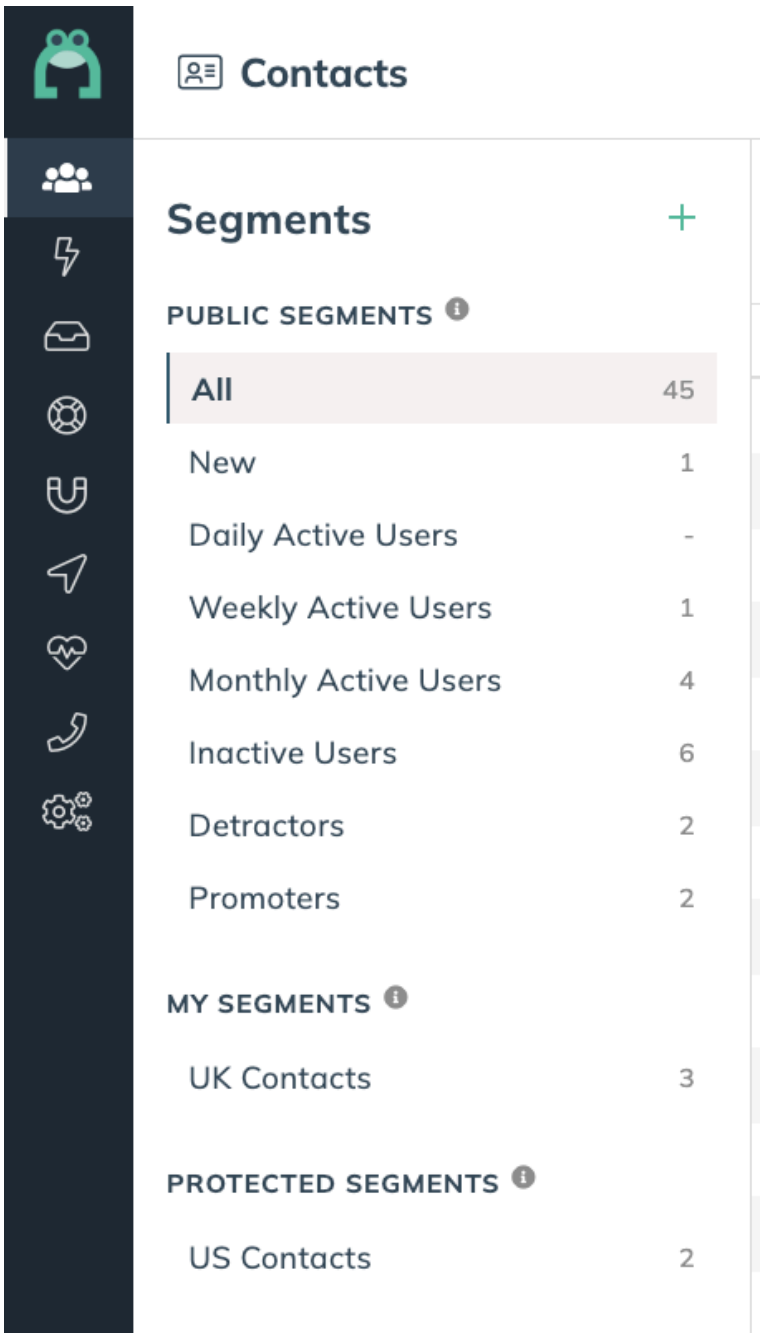
This segmentation is dynamic. When a client meets the conditions set (attributes and/or events) it will enter in the created dynamic segment and if it ever stops meeting those conditions, it will leave the segment automatically.

This allows you to communicate with your clients in a highly personal, but automatic, way. For example, you can launch campaigns to dynamic segments (that track current behavior) instead of just to static segments (that only take attributes into account).

To create a dynamic segment you only need to go to Contacts > Add desired conditions to filter > Click on **Save** symbol and add a name and select your desired visibility (public, private or protected)



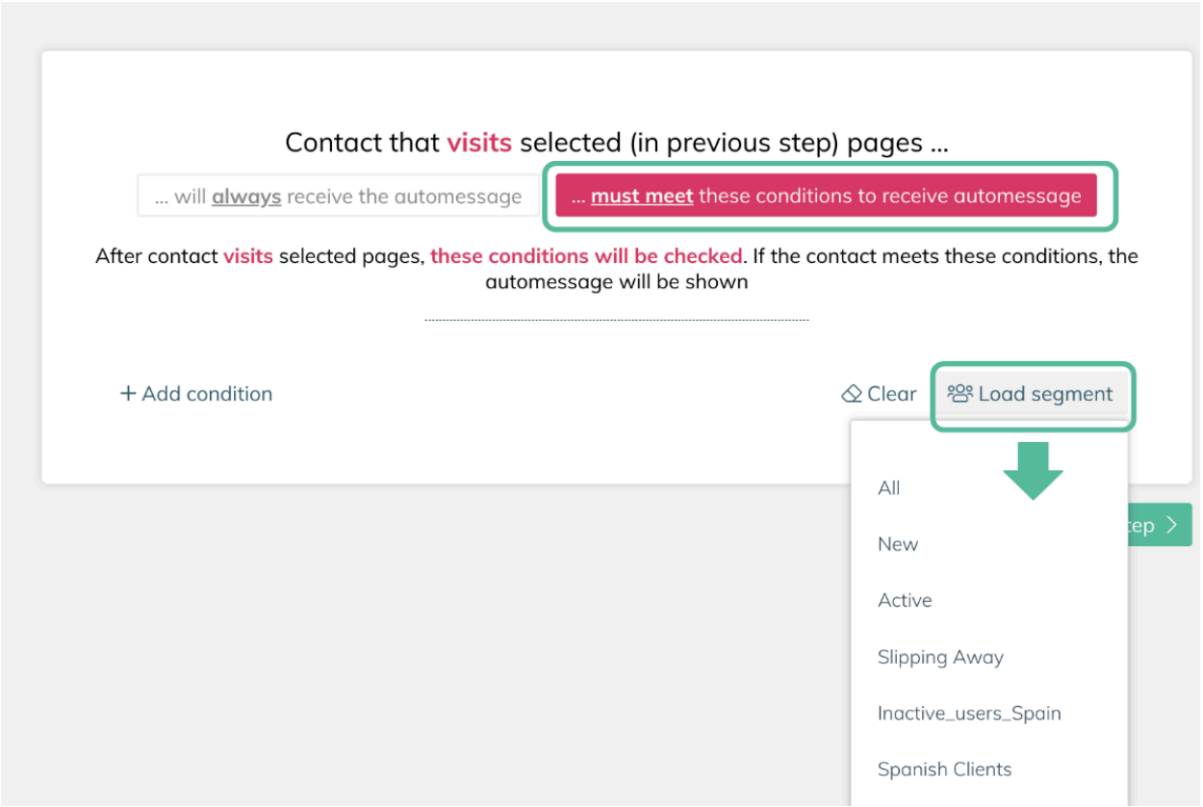
Once the segment is created, you'll have it at hand in the menu "**Segments**" within Contacts:



What else can I do with contact segments once created?

Segments are not only useful for tracking a specific group of contacts / users within the Contacts section, you can do so much more! Segments are a quick way to personalize all your FROGED communications, by allowing you to filter the audience directly as a specific segment. These include: Automessages, Behavioral Emails, Email Campaigns, Flows and NPS.

It's very simple! For any of the above, in the "Condition" step, just click on Load Segment and select the desired one from the list:



This way you don't need to create the filters manually again. Isn't it great?

7. Tips to start getting value out of FROGED

It's now your turn to create content and extract maximum value out of all modules and functionalities of FROGEED. Menu summary:

A. Onboarding

Complete the easy suggested Onboarding within FROGED to start taking your first steps: Getting Started

B. People: Contacts & Accounts

Once created or imported your contacts and accounts into FROGED, you'll have them ready for queries, creating segments, etc. in this menu.

Check all our available content in our Knowledge Base, and get the most value out of it cheking this articles: Contacts and Accounts

C. Live Stream

In this menu, you'll be able to track and look into your users' behavior, through the live tracking of FROGED events. For more information check this article:Live stream

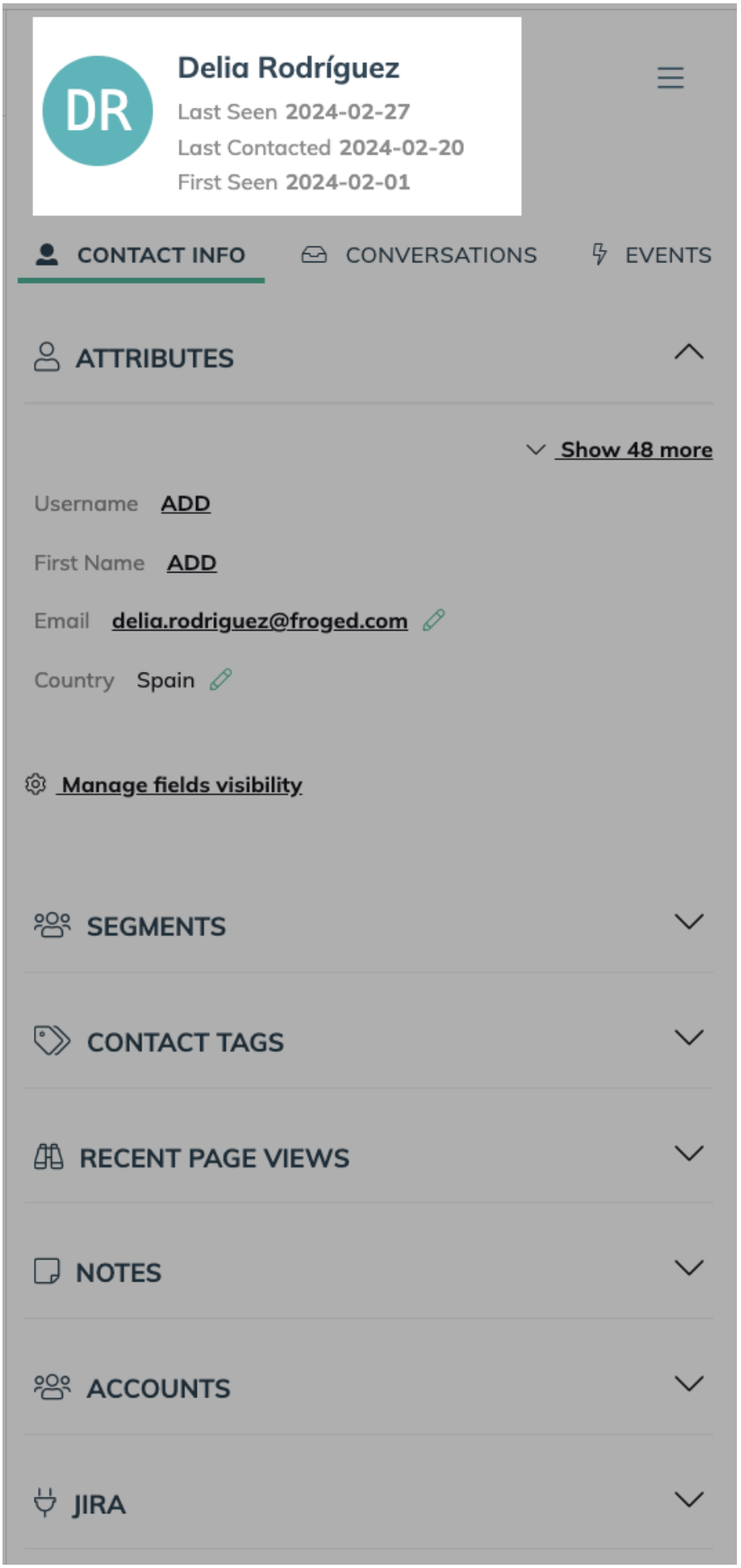
D. Live chat (Inbox)

Manage all your conversations from different channels (chat, whatsapp, support email, etc) from just one INBOX. From here, your agents will not only be able to reply to users but also do many more things like:

-Connect to a video call by Google Meet
-Send predefined responses ("Saved Replies")
-Send Knowledge Base articles
-Have all the context of who a user is, and what it has been doing in the platform before contacting Support
-Create and manage JIRA tickets from conversations… and much more!!

In order to get value out of everything possible within FROGED's INBOX, we invite you to take the following practical exercise:1# Challenge - Support Optimization




DR
Delia Rodríguez
Last Seen 2024-02-27
Last Contacted 2024-02-20
First Seen 2024-02-01
CONTACT INFO
CONVERSATIONS
EVENTS
ATTRIBUTES
Show 48 more
Username ADD
First Name ADD
Email delia.rodriguez@froged.com
Country Spain
Manage fields visibility
SEGMENTS
CONTACT TAGS
RECENT PAGE VIEWS
NOTES
ACCOUNTS
JIRA

E. Support:

The Support module includes access to the Knowledge Base (articles, training content, FAQ, etc) and section Updates (announcements).

Don't miss all the available content of how to create documents, updates, customize your support portal or check your support metrics in: Support features

F. Engage & Flows

For user communication purposes, for onboarding communication, engagement, retention, sales, etc, there's different tools which are great within FROGED. For more info:

- "Automessages": all available articles about what these are, how to create them, best practices, etc → Automessages
- "Behavioral Emails": all available articles about what these are, how to create them, best practices, etc →Behavioral Emails
- "Email Campaigns": all available articles about what these are, how to create them, best practices, etc → Email campaigns
- "Flows": all available articles about what these are, how to create them, best practices, etc → Flows . But especially, don't miss our Use Cases!

G. NPS (Net Promoter Score)

Activate your NPS survey to find out about your clients' experience and use it to talk more with them, get relevant feedback about your product or service, and predict the potential growth of your business.

Don't miss all articles about what it is, how it works and why it's important: NPS

H. Reports (metrics)

This menu offers the possibility of tracking key metrics of both your Suppo
rt service and your NPS survey. Don't miss the opportunity to check this key data for your business in this articles: Support Metrics and NPS Metrics.

THANKS AND ENJOY FROGED!!

