

THE
Coaches Console®
Powerful On-Line Tools To Drive Your Coaching Practice

The Coaches Console Getting Started Guide

Learn:

- Do-It-Yourself steps, tips and resources guiding you through the entire setup of your Coaches Console system.
- How to implement these DIY steps one-by-one and complete the process at your own pace.



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Critical Key #1

Getting Oriented, Logging In & Connecting with The Community

STEP

1

Logging Into Your Console System

Members Login

You can access this link at any time from CoachesConsole.com by clicking on “Members Login” in the upper right corner of the page.



When you click on the above link and enter your username/password, you can click on the check box “remember me” then add this link to your “Favorites”, so the next time you log in, it takes one simple click.

Once you’re logged into the Console system, you will need to Allow Pop-ups for this website. Go to your web browser settings and be sure to set it to “always allow pop-ups from this website”.

STEP

2

The Settings That Drive The Automation Of Your Back-End.



You MUST do this or your Console won’t work for you!

Once logged in, click on MY ACCOUNT (upper right corner of your system dashboard) and configure each of the these setting options:

- **Coach Profile:** set up your name, business name, address, etc. - these basic settings are used throughout your Console system.

- **Website Settings:** replace the default website URL with one of your choosing -- usually your name or business name (no spaces), select from additional options, add your email, your social media URLs and click SAVE.
- **Communication Settings:** configure your email address for communications and other options and click SAVE.
- **Calendar Settings:** configure your calendar options here and click SAVE.
- **Notification Templates:** review and customize each of the automated system notification emails that are sent to your clients.

STEP

3

The Easy Breezy Coaching Business Private Facebook Group

This is a **private group for all passionate Coaches Console members** to gather and discuss with one another **how to best use their Coaches Console system in their business**. Plus, in this private forum you can **ask your most urgent, burning or challenging business building questions**.

- ✓ [Click here](#) and request to be added to this group so you can post your questions and collaborate with other Coaches Console members right away.

STEP

4

Get Help When You Need It from Anywhere in Your System

No matter where you are in your Console system, help is just a click away. In the lower left of your system window is a blue question mark inside a circle. Clicking that icon opens the Help window where you can:

- Watch video tutorials relevant to your location in the system.
- Enter a question or keywords to search our knowledge database.
- Open a ticket with our Support Team.
- Visit our Support Center where you will find FAQs, Video Tutorials, training webinars, access to the private Facebook group, and information about our Coaches Console Certified Virtual Assistants.
- Live chat with a member of our Support Team (when available).
- Schedule a Zoom call with a support team member (during the available times).

Critical Key #2

Setting Up Your Professional Presence: The Basics of Your Website & Brand

Why this is critical:

While 40% of our members already have an existing website, the key feature of your Console website is the ability for you and your clients to interact and deepen the coaching experience. Even if you're just getting started, the **Private Client Website** component of your Console system is where you will stand out as a professional and build credibility FAST!

As you know, you receive a website with your Coaches Console membership.

There are 3 ways you can use this website:

1. As a stand-alone public website for marketing purposes, to get you started;
2. As a private client website to integrate with an existing website;
3. Full integration with your existing website.

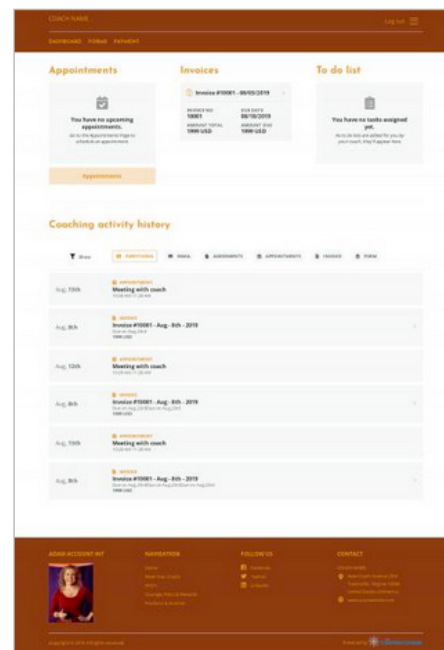
PUBLIC WEBSITE

What everyone sees:



CLIENT SIDE

Private client portal:

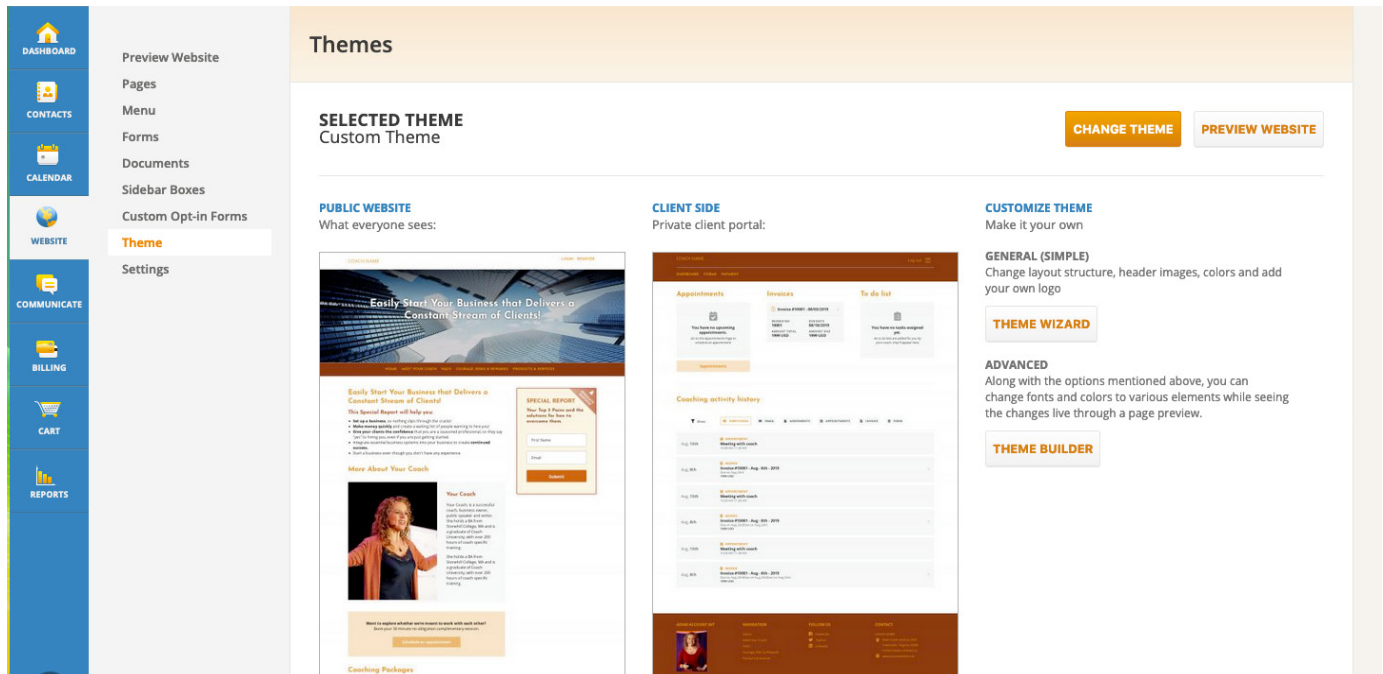


UP NEXT: Learn how to select a theme and set up the basic branding of your Coaches Console website no matter how you're using it.

Choose Your Theme.

Click on **WEBSITE** → **THEME**

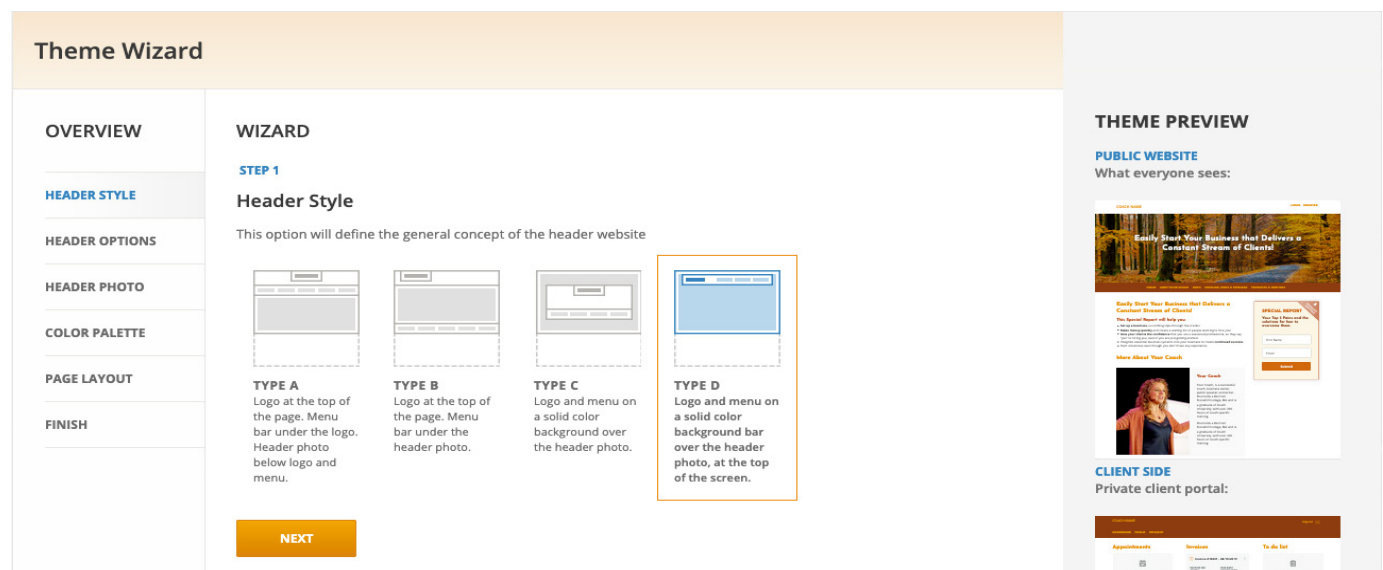
Select a pre-designed theme, then customize to make it your own.



- ✓ You will see a live preview of your public website and your private client website
- ✓ Click the CHANGE THEME button to see a selection of pre-designed themes
- ✓ Click the PREVIEW link for any theme to see the full demo
- ✓ When you find the perfect theme, click SELECT

Customize Your Theme

Click on **THEME WIZARD**



- ✓ The wizard walks you step-by-step through customizing your theme
- ✓ A live preview of your public and client website to the right show changes in real time
- ✓ Choose your header style
- ✓ Choose your header options and upload your logo
- ✓ Choose a header image, or upload one of your own
- ✓ Choose a color palette
- ✓ Choose a page layout
- ✓ Save your theme and you're finished!



For more advanced customization options you can use the **THEME BUILDER** by clicking the button on the Themes page (Website > Theme). You'll find a detailed video tutorial about using the Theme Builder in our Support Center [here](#).

STEP

3

Review Pages & Menus

Click on **WEBSITE** → **PAGES**

- ✓ Review the existing Pages pre-uploaded in your Console system.
- ✓ Customize existing Pages or add additional pages based on your business.
- ✓ Create Menus and connect them with Pages. **Click on WEBSITE → MENU.**

Page Title	Url	Status
Accessing the Power of Gratitude	accessing-the-power-of-gratitude.html	
Attention Ideal Client! (copy)	attention-ideal-client-copy.html	
Bio	bio.html	
Blocks Testing	blocks-testing.html	
Blocks testing 2	blocks-testing-2.html	
BUSINESS1	business1.html	
BUSINESS2	business2.html	
BUSINESS3	business3.html	



A “Menu” is the label that people see on your website to click and access the content of a Page. A “Page” is where the actual content lives (text, images, etc). We recommend that you create your Page first. Once your page is finalized, connect it to a Menu.

Review Forms & Documents

Click on **WEBSITE** → **FORMS**

Form Title	Active
Profile	<input checked="" type="checkbox"/>
Goals (Goals)	<input checked="" type="checkbox"/>
Discovery (Discovery)	<input checked="" type="checkbox"/>
Call Strategy (Call Strategy)	<input checked="" type="checkbox"/>
Evaluation (Evaluation)	<input checked="" type="checkbox"/>
Post Session Recap	<input checked="" type="checkbox"/>
Testimonial Form	<input checked="" type="checkbox"/>
Mid-Point Evaluation	<input checked="" type="checkbox"/>
Referral Form	<input checked="" type="checkbox"/>

- ✓ Review any existing Forms pre-uploaded in your Console system
- ✓ Customize existing Forms or add additional forms based on your business
- ✓ Review any existing Documents pre-uploaded in your Console system.

Click on WEBSITE → DOCUMENTS.



A Document is for reference only. For example, a chart, diagram, graph or PDF. A Form is interactive and requires the client to provide answers to questions or statements. The answers a client provides to a form on your private client website will automatically be saved in your client records within your Console system.



For more information on how to point your external domain name to your Console website, click the blue question mark in the lower left of your system window and search for **'point domain'**.



For more information on how to integrate your Coaches Console private client website with your existing external website, click the blue question mark in the lower left of your system window and search for **'integrate'**.



QUESTIONS? Click on the blue question mark in the lower left of your system to open the Help window where you can watch relevant videos, search keywords, open a ticket or access live chat (when available).

Critical Key #3

Uploading & Delivering Your Free Gift

Why this is critical:

One of the best lead generation and list building tools is to offer a free gift (or lead magnet as some call it) on your website. This is a great way for people to learn more about you, your style and the value you provide. As they deepen the know-like-and-trust factor through your free gift, they will move closer to taking action into becoming your next sample session.

How to upload your Free Gift



If you don't have a free gift yet, you can start by using the "Wheel of Life" document pre-uploaded into your Console system. Customize this document to make it specific to your niche: the Wheel of Relationships for example. Click on WEBSITE → DOCUMENTS.

STEP

1

Upload Your Document

Click on WEBSITE → DOCUMENTS → ADD DOCUMENT

The screenshot shows the 'Upload Document' interface. At the top, there's a header 'Upload Document'. Below it, there's a 'Select file' section with a 'CHOOSE FILE' button. Underneath, there's a 'Select Category' dropdown menu currently set to 'Main'. Below the category selection is a 'Description' section with a text area and a rich text editor toolbar. The toolbar includes various icons for text formatting (bold, italic, underline, strikethrough, bulleted list, numbered list, indent, outdent), alignment (left, center, right, justified), font color, background color, link, unlink, image, video, table, and other options like 'Formats', 'Open Sans' font, '16px' size, 'Replacement Tags', and 'Other...'. The text area below the toolbar is empty.

- ✓ Click CHOOSE FILE to select the document from your computer
- ✓ Select a category, or leave the default MAIN
- ✓ Enter into the Description section the title of your document and a short description.

Create Your Opt-In Form & Autoresponders

Click on **WEBSITE** → **CUSTOM OPT-IN FORMS** → **CREATE OPT-IN**

- ✓ Type in a name for your opt-in form (which also automatically creates a corresponding 'Group' in your contact list)
- ✓ Create the autoresponder messages to be sent when using this opt-in form
- ✓ Customize the 'Thank You' page displayed after someone opts into your mailing list

If you want to use the Opt-In form on your Coaches Console Website, you can choose on what page or sidebar box to place it, in **WEBSITE > PAGES > Add/Edit a Page or in **WEBSITE > Add/Edit a Sidebar Box**.**

- ✓ Type the text to be displayed above the opt-in form on your website
- ✓ Click on the icon "Insert Opt-In" from the editor toolbar to select, customize, and insert the Opt-In form

If you have an external website and want to place an Opt-in form on a page on that website:

- ✓ Go to the Opt-In form in edit mode (**WEBSITE > CUSTOM OPT-IN FORMS**) and then to the "Opt-In Code" tab.
- ✓ Click on the link "Get HTML Code" and copy/paste the code into the back-end admin area of your website.



*An easy way to have prospects book sample sessions with you is to include in the P.S. of your autoresponder messages the direct URL to your Console calendar. See **CRITICAL KEY #4** for more details on how to do this.*



QUESTIONS? Click on the blue question mark in the lower left of your system to open the Help window where you can watch relevant videos, search keywords, open a ticket or access live chat (when available).

Critical Key #4

Prospects Booking Sample Sessions On Your Website

Why this is critical:

The call to action within your free gift is always to book a sample session. Making it easy for prospects to book an appointment using your online calendar ensures that they can book in their perfect timing (now you don't have to force them when they aren't ready).

STEP

1 How To Schedule Blocks Of Available Time.

The screenshot shows a web form titled "New Available Time" with a yellow header. The form is set against a background of a calendar grid for October 13-19, 2019. The form fields include: "Appointment type:" with two checkboxes, "Discover Your Path to Prosperity Session" and "Private Client Session"; "Start:" with a date field set to 10/18/2019 and a time field set to 09:00 AM; "Stop:" with a date field set to 10/18/2019, a time field set to 05:00 PM, and a duration field set to 8 h; "Repeat:" with a checked checkbox and radio buttons for "Daily", "Weekly", "Monthly", and "Custom"; "Repeat every:" with a dropdown set to "1" and the text "weeks"; "Repeat on:" with checkboxes for days of the week (S, M, T, W, T, F, S), where M, T, W, T, and F are checked; "Until:" with a checked checkbox and a date field set to 10/19/2019; and two buttons at the bottom, "CANCEL" and "SAVE".

Prepare your calendar in advance by adding blocks of available time to your calendar for prospects and clients to choose from. Click on **CALENDAR → NEW AVAILABLE TIME** button.

- ✓ Select the appointment types you want to make available in this block of time
- ✓ Select the date, start time and stop time.
- ✓ You can either schedule a single appointment or click on "Repeat" for a recurring series.



Security and Confidentiality is of utmost importance. Your prospects or clients cannot see the names and scheduling of other clients on your calendar. They can only see open blocks of available time and any appointments they have scheduled with you.

Adding your Online Calendar to your Website

Edit Sidebar


Label

Schedule a complimentary session

Content

Rich text editor toolbar with options: Bold, Italic, Underline, Strikethrough, Bulleted List, Numbered List, Decrease Indent, Increase Indent, Text Color, Background Color, Link, Unlink, Image, Video, Code, Table, Horizontal Line, Undo, Redo, and a trash icon.

Other... ▾



Book your 30 minute no obligation complimentary session.

Words: 8

CANCEL **SAVE**

If you're using your Coaches Console website as your primary website, this is done for you! It's a default Sidebar Box already configured. To edit the text that displays along with the scheduling button, click on **WEBSITE → Sidebar Boxes** and then on the **EDIT** button in the drop-down menu to the right of the **Schedule a Complimentary Session** box.

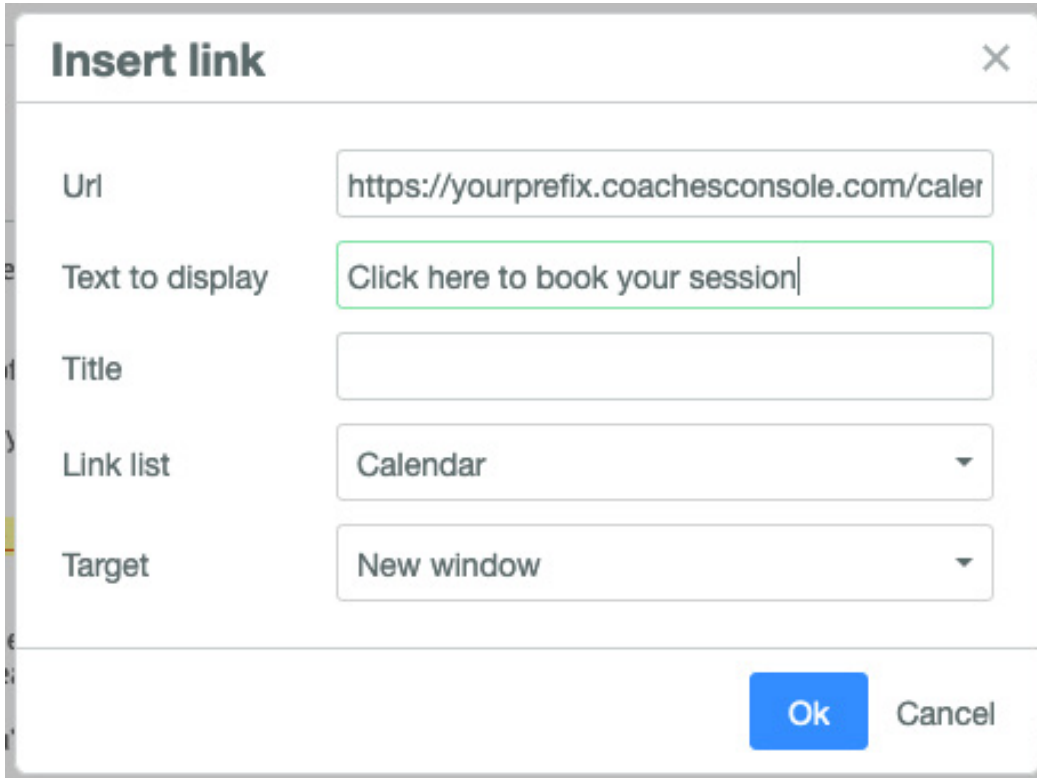
[Direct Link to your Coaches Console Online Calendar:](#)

Copy and Paste your unique link below in email messages, signatures and on webpages to provide quick and easy access to your prospects and clients so they can access the "available" times on your online calendar.

<https://yourprefix.coachesconsole.com/calendar/>

If you're using an existing external website and wish to place your online Console calendar directly on your website, **go to CALENDAR → CALENDAR SETTINGS → Direct Link to your Coaches Console Online Calendar** and copy/paste this link to your existing website. If you are not familiar with how to do this, contact your website designer and provide them with this URL.

Adding a direct link to your calendar in autoresponders and emails



Insert link

Url:

Text to display:

Title:

Link list:

Target:

Ok Cancel

- ✓ Within the body of your autoresponder/email message type in the phrase 'click here to book your session today' (or some variation of this).
- ✓ Highlight the phrase and click on the 'Insert/Edit Link' icon within the editor toolbar.
- ✓ Paste in your Calendar URL (select it from the Link List > Calendar).
- ✓ Click 'OK'.



QUESTIONS? Click on the blue question mark in the lower left of your system to open the Help window where you can watch relevant videos, search keywords, open a ticket or access live chat (when available).

Critical Key #5

Organizing Contacts, Clients & Prospects

Why this is critical:

Getting prospects and clients entered into your Console system is where the magic begins to happen! It is through this step that you can begin to market to prospects and engage your clients at the new exquisite level of support you offer through using The Coaches Console as your practice management tool.

STEP

1

Organize Your Contacts List.



Our Console system automatically organizes every contact by status type:

Active Clients: Current clients (paying or pro-bono) that have access to your private client portal.

Inactive Clients: Former clients, no longer using your services, but you wish to maintain their files, records, etc. Their username and password have been deactivated and they can no longer log into your private client portal.

Hot Leads: More than a prospect, these contacts are on the verge of becoming your next client. These are the contacts you've scheduled sample sessions with. Hot leads can log into your private client portal and access resources and materials (based on permission access), such as specific pages, forms, and documents to help them prepare for their sample sessions.

Buyers: These are individuals who entered your system by purchasing a package, product or program from your Console Shopping Cart and aren't already categorized in one of the above status types.

Prospects: Any and all other contacts. These may be friends, family members, referral sources, and potential clients.



These status types directly reflect the way your hours are automatically tracked for your Certification Report. Hours/appointments scheduled with Active, Inactive, Hot Lead and Prospect status types will be included in your certification report.

- ✓ **Create Groups.** In addition to status types, you can segment your contacts into group(s) created in **CONTACTS TAB → MANAGE GROUPS (link to the right) → ADD GROUP**.
- ✓ **Add Contacts.** Manually add contacts to your Console system using the + icon (lower left side) → **ADD CONTACT** or in **CONTACTS → link "Add contact"** on the right side.



Each of the different status types will have required contact information fields marked with labels in red letters in **CONTACTS** → **CONTACT NAME** → **Profile tab** (e.g.: *First Name*).

STEP
2

Import An Existing Contacts List.

Click on **CONTACTS TAB** → *Import Contacts icon (lower left)*.



Import Export Contacts

 Import Contacts

File Type **Microsoft Outlook XP**

File **CHOOSE FILE**

IMPORT CONTACTS

- ✓ You can also use the link “Import/Export Contacts” to the right side of the **CONTACTS** section.
- ✓ We strongly recommend that you watch the [video tutorial](#) in the Help Center.
- ✓ First, export your contacts from your source software (Gmail, Yahoo, Contacts on Mac, etc).
- ✓ Save the file to your computer (where you can recall it’s saved). Convert it into a CSV (Comma Separated Values) file either in the contacts software or in Excel or OpenOffice.
- ✓ In the Console, select the file you wish to import and follow the prompts to complete the import process. Make sure you match the Console client data fields with the data columns in your file.



The contact entries in the import file must have **a name (either first or last) and an email address** to be imported into your Console Contacts list. The entries that lack this data will be skipped during the import and not entered in your Console system. You will see that in the Import Report.



QUESTIONS? Click on the blue question mark in the lower left of your system to open the Help window where you can watch relevant videos, search keywords, open a ticket or access live chat (when available).

Newsletters, Autoresponders & Emails

Within your Coaches Console system you have the ability to:

- STEP
1

Go to **COMMUNICATE** → **NEWSLETTERS** → **CREATE NEWSLETTER**.

Create your Newsletter and include the 5 most effective newsletter elements:

1. Personal Note
2. Article
3. Cool Resource
4. Upcoming Events
5. Testimonial

Steps for sending a newsletter:

- ✓ Choose a Template from the drop-down list or start fresh.
- ✓ Type/edit the content. If pasting from a source, use the “Paste as Text” icon in the editor menu.
- ✓ **Options tab > Send Newsletter to:** Choose all client status types and groups to make sure everyone on your mailing list receives your newsletter.
- ✓ Choose your ‘Sending Options’.
 1. **SEND NOW:** the system sends it in the next 5-10 minutes.
 2. **SAVE AND SCHEDULE:** select a future date and time when your newsletter will be sent automatically.



If you don't like to write, are stuck on what to write or are too busy to create content for your Newsletter, use one of the free articles pre-uploaded into your Console system.

*You can edit your newsletter templates in **COMMUNICATE** → **NEWSLETTERS** → **EDIT TEMPLATES** (button to the right side).*

STEP

2

How To Set Up Custom Autoresponders

Click on **COMMUNICATE** → **AUTORESPONDERS**

Edit Autoresponder Message: [Courage] Your Free Resource Enclosed

1 Name & Groups

2 Autoresponder Messages

3 Thank You Page

4 Opt-in Code

Delay

0



☒ Relative date/time

✓ Day(s)

Week(s)

Month(s)

☐ Absolute date/time

- ✓ Name your autoresponder series.
- ✓ Add the messages to your series and set your timing sequence either by relative interval (# of days, weeks, months delayed from contact opt-in date) OR by specific date and time.
- ✓ Select the subscribers in one go by checking the box in front of their names and save.



QUESTIONS? Click on the blue question mark in the lower left of your system to open the Help window where you can watch relevant videos, search keywords, open a ticket or access live chat (when available).

3

How To Set Up New Client Autoresponder

Click on **COMMUNICATE** → **AUTORESPONDERS** → **NEW CLIENT AUTORESPONDER**

Edit Autoresponder: New client autoresponder






ADD MESSAGE

1 Choose a name

2 Edit Messages

3 Select Subscribers

✉ Autoresponder Messages

Scheduled Date	Title	
0 day	Welcome To Coaching!	
1 day	Getting Started - Access To Your Private Client Portal	
4 days	Coaching Resources Available To You	
45 days	Tell Me What You Think	
60 days	Capture Your Enthusiasm	

This series is automatically triggered when a new client electronically clicks on the 'I Accept' button to electronically agree to your coaching agreement (provided that you checked this option in the agreement settings). The series can also be manually assigned by you to a new client.



The New Client Autoresponder is an excellent way to automate the delivery of your welcome message, as well as providing instructions to new clients for accessing your Private Client Portal.

4

How To Set Up Email Templates & Campaigns

Click on **COMMUNICATE** → **EMAILS**

Create Email

1 Content

2 Select Contacts

3 Options

Start with a template

\$FIRSTNAME\$, Benefits You Receive with Coaching

Subject

\$FIRSTNAME\$, Benefits You Receive with Coaching


Content


B


I


U

~~S~~










Formats ▾


PT Sans ▾


13px ▾


A ▾


A ▾













































































Other... ▾

Dear \$FIRSTNAME\$

I wanted to check in and see if you had a chance to complete the Goals form within the Private Client Website. One of the benefits of being a coaching client is the ongoing support and tools that I offer to help you make the most of your coaching. By accessing and

- ✓ Create & Edit Email Templates: For the common messages that you'll send repeatedly, create them as templates to be used and reused in your system. You can also save drafts.
- ✓ Add the Title (Subject Line), create and format the content of your message.
- ✓ Select any Documents to be included in the email messages.
- ✓ Select the Contacts to send the email to.
- ✓ Choose your 'Sending Options':

SEND NOW: sends the email in the following 1 to 5 minutes.

SAVE AND SCHEDULE: sends it automatically at a future date and time selected by you.



If you are creating an email campaign for promotion purposes, use the Custom Autoresponder feature and/or the Custom Opt-In Form feature where people can subscribe, to automate the delivery of all the messages within a series.



QUESTIONS? Click on the blue question mark in the lower left of your system to open the Help window where you can watch relevant videos, search keywords, open a ticket or access live chat (when available).

Critical Key #7

Setting Up Your Billing Settings, Merchant Account & Shopping Cart Settings, So You Are Prepared To Sell Packages, Products & Services Online

Why this is critical:

Before you can begin to receive payments from clients, there are a few things that need to be in place first.

STEP

1

Basic Billing Settings

Click on **BILLING** → **BILLING SETTINGS**


Billing Settings

Merchant & PayPal

Company Accounts


Currency & Tax

Recurring Billing

 PayPal

Your PayPal Email here

Don't have a paypal account?
[Create one for free at paypal.com](https://www.paypal.com)

 Authorize.net, DirectPay, PracticePay

Api Login

Transaction Key

☐ My merchant account supports American Express cards

To acquire the necessary settings, login to your merchant account and "obtain your API Login ID". Record that, along with your Transaction Key in the spaces above.
[\(Don't have a merchant account?\)](#)

SAVE

- ✓ **Merchant & PayPal.** If you wish to process payments either through your private PAYMENTS page or through your online storefront using your Console Shopping Cart, you will need a merchant or a PayPal account. If you already have a merchant account, it can be integrated into your Console system *as long as your merchant account uses Authorize.net as the gateway provider.*
- ✓ **Company Accounts.** This allows you to categorize the type of revenue being processed when you invoice your clients.
- ✓ **Currency & Tax.** A number of international currencies are supported through your Console system (the same international currencies that are supported by PayPal). Choose your default currency.
- ✓ **Recurring Billing.** If you plan to sell packages, programs and products with payment instalments using your Console Shopping Cart, then your merchant and PayPal accounts must support recurring payment processing. The validation of the CIM (Customer Information Manager) module only refers to your Authorize.net merchant account, not to PayPal.

STEP

2

Setting Up Coaching Agreement Templates

Click on **BILLING** → **AGREEMENTS** → **ADD TEMPLATE**

Agreement Templates

SET UP NEW CLIENT AGREEMENT

ADD TEMPLATE

Existing Agreement Templates

Title	Details	Duration
⋮ Total Results Coaching Package (6 Months)	600 per month sessions per month	(6 months) ⚙️
⋮ Total Results Coaching Package (6 Months)	600 per month sessions per month	(6 months) ⚙️



Four agreement templates have been pre-uploaded for you to use or customize, each addressing different coaching levels and durations, and types of clients. These templates are based on pricing your services in a package model. You can also create templates based on per hour, per session, per month or per project.

- ✓ **Select a Template** to get started
- ✓ **Invoicing:** Determine the type of invoicing you'll be doing for the selected agreement template: manual vs. automated.
- ✓ **Contract Terms:** Configure your written contract terms of your agreement. A default

agreement terms template has been pre-uploaded for you to get started. Or customize and save your own.

- ✓ **E-mail:** Create the email proposal message that will deliver the Agreement Link to your new or existing clients for them to click on, review the terms, and sign online.
- ✓ **Thank You:** Customize a 'Thank You' page that is displayed right after the client accepts the terms of your agreement.
- ✓ **Preview & Send:** Review what will happen from the clients' perspective.

For more details, see Step 3 below: Shopping Cart Setup.

STEP

3 Console Shopping Cart Setup

- ✓ In order to sell products online you must have a **merchant account** or a **PayPal business account**, so that you can securely receive credit card payments online.

Billing Settings

Merchant & PayPal

Company Accounts

Currency & Tax

Recurring Billing

To be able to charge recurring fees through the Shopping Cart module you need to set up recurring billing through one of the payment gateways below:

☐ PayPal API Credentials

In order to use recurring billing you need to have a Premier or Business PayPal Account.

[How to upgrade your Personal account, get your API credentials and set up IPN](#)

Your PayPal API
Username

Your PayPal API
Password

Your PayPal API
Signature

☐ Authorize.net PracticePay CIM

In order to use the Recurring & Payment Plan options we offer for product payments, the CIM (Customer Information Manager) module needs to be enabled in your Authorize.net account. Once you have enabled CIM (Customer Information Manager) in your Authorize.net account, click the "Validate" button below to check if your system supports recurring payments.

CIM Not verified or not enabled! **VALIDATE**

SAVE



*If you plan to offer recurring payment processing or plan to sell a product/package with installment payment options, then your merchant account **MUST** be able to support recurring payment processing. Check with your merchant provider to make sure you have the right level of merchant account in place (CIM module for Authorize.net and Premier or Business PayPal account.)*

- ✓ Connect your payment account to your Coaches Console system. Click on **BILLING → BILLING SETTINGS** and under the “Merchant & PayPal” tab you can enter the required merchant account data or PayPal account. Clicking ‘Save’ will automatically integrate your Console System with your payment account.
- ✓ Within your Coaches Console system, click on **BILLING → BILLING SETTINGS → RECURRING BILLING** Tab. Here you’ll find the step-by-step instructions and tutorials on how to obtain your API settings in your PayPal account and add them to your Coaches Console system (don’t worry, we walk you through everything step-by-step).
- ✓ **Validate CIM module for Authorize.net merchant account:** Once you’ve confirmed your merchant account and added in the correct API settings in your Console system, simply click the “VALIDATE” button (you’ll find this also under **BILLING → Billings Setings → Recurring Billing**). When you see the green message “Cim is enabled” message you know your Console system is set and ready to sell products online!!!



QUESTIONS? Click on the blue question mark in the lower left of your system to open the Help window where you can watch relevant videos, search keywords, open a ticket or access live chat (when available).

Critical Key #8

How To Schedule The Coaching Session, Take Notes, Provide Follow-Up To Your Clients & Automatically Track Your Hours For Certification

Why this is critical:

Now we're talking...engaging your clients and guiding them through the Optimal Coaching Experience is how raving fans are created and where the referrals begin! Not to mention this is your zone of genius and your Console system plays a powerful part in delivering Exquisite Client Support, consistently every time!

STEP

1

How to book a client appointment or a group appointment

Click on the **CONTACTS TAB** → **CLIENT NAME** → **APPOINTMENTS** → **NEW APPOINTMENT**

The screenshot shows the 'New Appointment' form in a web application. The form has a yellow header bar with the title 'New Appointment'. Below the header, there are several sections: 'Type' with a dropdown menu set to 'Private Client Session' and a 'with:' dropdown set to 'A Client' with a green checkmark; 'on:' with date and time pickers for '10/18/2019' and '08:00 AM' to '08:40 AM', and a duration picker set to '40m'; 'Title' with a text input field containing 'Crystal Hodge'; 'Repeat' with an unchecked checkbox; 'Description' with a large yellow text area; 'This appointment is Pro bono' with an unchecked checkbox; 'Send confirmation email to client immediately' with an unchecked checkbox; 'Choose confirmation template:' with a dropdown menu set to 'Appointment Confirmation [Private Client]'; 'Choose reminders:' with a checked checkbox for 'Default Appointment Reminder [Private Client]' and a dropdown menu set to '24 hours in advance'; 'Choose Follow-up:' with an unchecked checkbox; and 'Set a color for this appointment (optional):' with a color picker showing a grid of colors.

- ✓ Choose the appointment type from the drop down list
- ✓ Choose the date, start time and stop time of the appointment.
- ✓ Select "Repeat" if you schedule a recurring appointment series.
- ✓ Enter a description (this will be displayed in the appointment reminder the client receives).

- 

*When you use your Console Calendar to schedule your coaching sessions (whether it's an individual coaching session, or group appointment) your coaching hours for certification are automatically compiled into a Certification Report for you. No need to stress over this; it's done for you! Go to **REPORTS** → **CERTIFICATION REPORT** to generate the report.*

2

Click on CONTACTS → CONTACT NAME → APPOINTMENTS → Session Notes icon to the right of the appointment.

- ✓ During or after the session, enter your private notes in the box “Coach Private Notes”.
- ✓ Scroll down on this same webpage and enter any follow-up notes in the box ‘Appointment Notes to E-mail to {client’s name}’. Only the notes in this section will be emailed to your client, if you choose the option to email them.



The Post Session Recap Form follow-up template has been pre-uploaded in your Console system as a follow-up tool to use with your clients. Click the **INSERT** button to use a Session Follow-up template after you select it from the drop-down list, or the button **EDIT TEMPLATES** to edit existing templates or create new ones.

STEP
3

Interact With Your Clients In Between Coaching Sessions Using The Client Log Feature

Click on **CONTACTS** → **CONTACT NAME** → **CLIENT LOG**

The screenshot shows the 'Client Log' tab selected in a navigation bar. Below the navigation bar is an orange button labeled 'ADD NEW LOG ENTRY'. Underneath are three buttons: 'SHOW MESSAGES', 'PRINT', and 'DOWNLOAD LOG'. A checkbox labeled 'Show All Log Entries' is checked. Below these is a section titled 'Existing Log Entries'. The log entries are displayed in a table-like format with columns for 'Log Note', 'Show to Client', and 'Edit'. The first entry is from Jackie Demo, dated 08/19/2019 03:06 PM, with the subject 'Follow up to our call today ...'. The log note contains a greeting to Crystal, a message about a discovery session, an attached document 'how-to-beat-the-fear-of-marketing-yourself-online.docx', and a sign-off. The second entry is from Crystal Hodge, dated 08/25/2019 03:08 PM, with the subject 'Perfect timing! This article is just what I needed to get me into action on my new marketing plan. Thanks so much!'. The log note contains a thank you message and a sign-off.

Log Note	Show to Client	Edit
<p>Jackie Demo posted on 08/19/2019 03:06 PM Follow up to our call today ...</p> <p>Hi Crystal,</p> <p>Great job today going deeper on those discovery questions! You are right where you should be, and moving at the perfect pace for YOU. I'm attaching an article I wrote last year that I think will be helpful to you as you move forward. If you need feedback, or have questions ... or want to share a celebration with you ... I'm here for you.</p> <p>Best,</p> <p>Jackie</p> <p>Files Attached how-to-beat-the-fear-of-marketing-yourself-online.docx</p>	Yes	
<p>Crystal Hodge posted on 08/25/2019 03:08 PM</p> <p>Perfect timing! This article is just what I needed to get me into action on my new marketing plan. Thanks so much!</p> <p>- Crystal</p>	Yes	

The top 4 effective uses of your Client Log with your clients:

- ✓ To share a resource you discovered that would benefit your client;
- ✓ To post homework commitments;
- ✓ To post recordings of coaching sessions;
- ✓ To upload documents you need your client to review.

The top 3 most common ways your clients use the Client Log from within your Private Client Website:

- ✓ To post homework for your review prior to the next session;
- ✓ To ask urgent questions that need addressing before the next session;
- ✓ To share celebrations without having to wait.



QUESTIONS? Click on the blue question mark in the lower left of your system to open the Help window where you can watch relevant videos, search keywords, open a ticket or access live chat (when available).

Critical Key #9

How to Bill Your Clients Using Invoices

Why this is critical:

Part of being a savvy business owner is setting up professional ways to invoice your clients, process payments, issue receipts, and track your finances. We know most folks would rather spit nails, but without this element in your business you'll never thrive at doing what you love!



To be more effective, learn how to automate your invoicing with either client agreements (DIY Critical Key #7 Step 2) or products with recurring billing (DIY Critical Key #7 Step 3).

STEP

1

Create Your Invoices And Set Up Payment Options

Click on **BILLING** → **CREATE INVOICE** to create a manual invoice.

The screenshot shows the 'Create Invoice' interface. At the top, there's a header with 'Create Invoice' and a 'SAMPLE INVOICE' button. Below this is a section titled 'Invoice Dates' containing fields for 'Starting Invoice number' (set to 12), 'Invoice Date' (10/01/2019), 'Due Date' (10/31/2019), and 'Invoice services between' (10/01/2019 and 10/31/2019). The next section is 'Invoice Line Items', which has three buttons: 'BILL FOR COACHING', 'ADD MISCELLANEOUS', and 'ADD NOTE'. Below that is the 'Select Clients' section with two dropdown menus for 'Contact Types' and 'Groups'. At the bottom of the form is a 'PREVIEW INVOICES SUMMARY' button.

- ✓ Enter the invoice # (your console system automatically tracks this for you), invoice date and due date, then select/verify the interval for delivering the services.
- ✓ Click the button “Bill For Coaching” to generate invoices based on client agreements that pre-populate the invoice with the amounts agreed to in the client agreement.



Manual invoices based on client agreements can only be created once a client has clicked the button 'Click to Accept Agreement' on the client portal and has accepted the terms of your coaching agreement. If a client does not sign the online agreement in this way, then the invoice you're creating will not be pre-populated with the agreement amounts and you will have to manually create an invoice using the 'Add Miscellaneous' button.

- ✓ Select the client(s) you wish to generate an invoice for and generate the draft invoice(s).
- ✓ Go to your draft invoice(s) and choose between the available options:
 1. Create & Send (email) Invoice
 2. Create Invoice Only (use this option if you've been authorized to process payments on behalf of your client and you don't need to send the invoice to the client via email)
 3. Send me a copy (this emails you a copy of the invoice)

STEP 2 View Client Payments

Click on **CONTACTS** → **CONTACT NAME** → **INVOICES**

CH

Crystal Hodge
GROUPS(3): Courage, Risks and Rewards Coaching Program (group), My Group, CSpradlin Group [Edit](#)
AUTORESPONDERS(2): Courage, Risks and Rewards Coaching Program autoresponder, New client autoresponder [Edit](#)

[Login as Crystal](#)
[Send email to Crystal](#)

ProfileAppointmentsClient LogEmail LogFormsProductsCoursesAgreement**Invoices**To Do List

Invoices History

To see transaction details and manually enter payments, click the "View" link beside the invoice information.

From:10/18/2018To:10/18/2019

[SHOW INVOICES](#)[CREATE INVOICE](#)

Invoice Date	Due Date	Inv. #	Description	Amount	Paid	Balance	Options
08/22/2019	08/27/2019	11	3-month Jumpstart Coaching Package	2997.00 USD	0.00 USD	2997.00 USD	View
Total(s):				2997.00 USD	0.00 USD	2997.00 USD	

Every invoice created for each client will be listed under this Invoices section. From here you can view the details of each invoice, re-send to clients an outstanding invoice or a receipt for a paid invoice, and manually process a payment when a client pays by check, cash, when you're bartering, or when the client pays you by any means outside the Console and thus the invoice(s) are not marked automatically as paid in their Invoices section. The invoices will be automatically marked as paid only when the clients (or you in their behalf) log into the Console first and pay through their client portal using either the Paypal or Authorize.net payment portals.

Send A Receipt

Click on **CONTACTS** → **CONTACT NAME** → **INVOICES**



THE COACHING ADVANTAGE LLC
encouragement to go beyond ...

INVOICE NO.	INVOICE DATE	DUE DATE
684	09/01/2018	09/01/2018

PAID

BILL TO:	REMIT TO:
Helen Ramsey	Coaching Beyond PO Box 1234

- ✓ From this Invoices screen, click 'View' to see the details. If a manual payment needs to be made, click 'Add Payment' to enter the payment details, then "Apply" to save the changes.
- ✓ Once a payment has been processed for an invoice, a receipt is automatically created for that invoice. You'll see the button 'Email to Client' at the bottom. Clicking this button will send a copy of the invoice along with the receipt details for the received payment.

Review The Invoices Report

Click on **REPORTS** → **INVOICE REPORT**

- ✓ Select the current month or a different interval to view any/all invoices that have been created in that interval and click on the button "Generate" to create the report.
- ✓ View the invoices created vs. payments received.
- ✓ Contact any clients with outstanding invoices to be sure they pay before their next coaching session.



QUESTIONS? Click on the blue question mark in the lower left of your system to open the Help window where you can watch relevant videos, search keywords, open a ticket or access live chat (when available).

Critical Key #10

How To Sell Your Coaching Packages, Services, Products & Programs Online using your Console Shopping Cart

Why this is critical:

One of the keys to a successful coaching practice is offering a variety of effective products and programs online, to suit the needs of a variety of clients. From your free classes or calls to your high ticket coaching programs, you can integrate it all into a cohesive lineup that flows naturally from one item to another using your Console Shopping Cart. Plus, an alternative to invoicing your clients is to have them purchase your packages, products, programs, and services directly online.



The Shopping Cart is a separate module in your Console system. If you have not yet upgraded your Console system to include the Shopping Cart, then what you're about to read will NOT appear in your Console system! You must first upgrade your Console system to include this module to take advantage of selling your packages and products online. To upgrade your account, log into your Console system, click on the CART tab, and on that screen you will see a link to add the Shopping Cart Module to your Console system. As an existing member you receive a 50% savings on this module (that's \$50/month).

STEP

1

Preview Your Done4You 'Products & Services' Page

Click on **CART** → **PRODUCTS** → “**PRODUCTS & SERVICES**” button.

Products					ADD PRODUCT	PRODUCTS & SERVICES
Existing Products						
Title	Price	Availability	Available Quantity	Display		
Courage, Risks and Rewards Coaching Program	97.00 USD	Anytime	Unlimited	<input checked="" type="checkbox"/>		



Because you receive a bonus 5-part coaching program pre-uploaded into your system, your Done4You Online Storefront has already been configured and is ready to activate. Once you preview this page (to see it from the visitors' and clients' perspective), simply click the 'Activate' button to display this page on your Console website. Buyers, clients and prospects can immediately begin to purchase this (and other products) from your online storefront.



Turn Your Initial, Entry Level Coaching Package Into A Product.

- ✓ Go to CART ➔ PRODUCTS and click on the ADD PRODUCT button.
- ✓ Create the product name and product settings (price, availability, # of buyers, etc).
- ✓ In the 'Content Access' tab choose which content is assigned to a product (so that the participant has access to the selected, private content upon purchase).
- ✓ Create the unique autoresponders that are assigned to this product to automate the delivery, upsell and/or follow-up. And create/edit the Thank You page that buyers see after purchase.
- ✓ Determine how/where you'll apply the 'Buy Now' buttons to sell the product on your website.



Before you can offer **recurring payment options, payment plans or installment options**, you must configure your merchant account settings in a certain manner. Check back to DIY Critical Key #7 Step 3 for instructions on this.



'Rinse and Repeat' - Turn Your Higher Level Coaching Package Into A Product.

- ✓ Go to CART ➔ PRODUCTS and click on the ADD PRODUCT button.
- ✓ Create the product name and product settings (price, availability, # of buyers, etc).
- ✓ In the 'Content Access' tab choose which content is assigned to a product (so that the participant has access to the selected, private content upon purchase).
- ✓ Create the unique autoresponders that are assigned to this product to automate the delivery, upsell and/or follow-up. And create/edit the Thank You page that buyers see after purchase.
- ✓ Determine how/where you'll apply the 'Buy Now' buttons to sell the product on your website.



For more information on **how to create and price your coaching packages**, [click here](#) to view one of the trainings we delivered on this topic.

For more training and information on the Shopping Cart and creating products, search for the following phrases in the [Support Center](#) or in the Help pop-up (click on the question mark icon in your Console interface):

1. Setting Up Your Console Settings to Sell Online
2. How to create products
3. Selling & gifting products
4. Selling products on an existing website
5. Your Done 4 You professional storefront - sell products instantly
6. How to create a course
7. Selling your courses online
8. How To Sell Your Courses Online Using Your Coaches Console Shopping Cart
9. How Can I Sell/Invoice My Coaching Services And Also Have A Coaching Agreement In Place With The Client

You can also click on [this link](#) to get to the short video tutorials about products and courses.



QUESTIONS? Click on the blue question mark in the lower left of your system to open the Help window where you can watch relevant videos, search keywords, open a ticket or access live chat (when available).

Critical Key #11

Using your Bonus Done4You Course and Creating Courses/Programs of Your Own


Why this is critical:

Pre-uploaded into your Console system is a 5-part coaching program: **Courage, Risks & Rewards Coaching Program**. This is an entry-level program ready for you to use as a free gift to grow your contacts list and/or to sell online to make money. It's designed to be a DIY Home Study type of program and it's available as it is or **you can customize it to make it niche specific**.

STEP
1

Review The Coach's MANUAL for the 'Courage, Risks & Rewards Coaching Package' To Learn About Your Program.

Click on *WEBSITE* → *DOCUMENTS*

Coach Private Documents	
Description	Client Website
Courage, Risks & Rewards Coach's Manual >> This manual is for the coach's use only. The coach will find inside this manual how to ...  4994-Courage_Risks_Rewards_Coaching_Package.final.pdf	N 

In this manual:

- ✓ Review the 8 Strategies to Grow Your List using this program.
- ✓ Review the 5 Ways To Make Money (immediately) using this program.
- ✓ Rehearse the script that's included to deliver this as a free marketing teleclass.



QUESTIONS? Click on the blue question mark in the lower left of your system to open the Help window where you can watch relevant videos, search keywords, open a ticket or access live chat (when available).

Review The Way The Content Of The 5-Part Coaching Program Has Been Pre-Uploaded Into Your Console System; Ready For You To Deliver.

Click on CART → COURSES → Courage, Risks & Rewards (click on “Edit” in the drop-down menu to the right)

The screenshot displays the 'Courage, Risks and Rewards Coaching Program' interface. At the top, there is a header bar with the program name and two buttons: 'BACK' and 'ADD NEW LESSON'. Below the header, there is a section titled 'Lessons'. This section contains a table with two columns: 'Title' and 'Content Access'. The table lists six lessons, each with a title and a 'visible' status with a dropdown arrow and a settings gear icon.

Title	Content Access
Part #1 Taking a Chance and Making a Mistake	visible ▼ ⚙️
Part #2 Your Attitude Toward Taking Chances	visible ▼ ⚙️
Part #3 Section 1 Why We Avoid Taking Risks	visible ▼ ⚙️
Part #3 Section 2 What Supports Risk Taking	visible ▼ ⚙️
Part #4 What I Gain From Taking Chances	visible ▼ ⚙️
Part #5 Review and Lock It In	visible ▼ ⚙️

- ✓ Understand how the content of the course is broken into ‘Lessons’.
- ✓ Discover the different types of content that can be used to build a course:
 1. Text
 2. Videos
 3. Interactive Forms
 4. Documents
 5. Discussion Box
- ✓ Experience how a participant can access each Lesson (module, session, section or chapter) of your course by using the PREVIEW button in the drop-down menu to the right of the lesson.

Review The Courage, Risks & Rewards PRODUCT To Sell Your Program Online.

Click on *CART* → *PRODUCTS* → *Courage, Risks, Rewards Program* (click on “*EDIT*” in the drop-down menu to the right).

Edit Product: Courage, Risks and Rewards Coaching Program

1 Name and Pricing 2 Contract terms 3 Content Access 4 Autoresponder Messages 5 Thank You Page 6 Links & Buttons

A Product name

Courage, Risks and Rewards Coaching Program

Product Type

☒ DIY Home Study ☐ Teleseminar ☐ Group Coaching ☐ Live Event
☐ Signature Package

Product Description

(this will show up on your Products & Services page)

Formats PT Sans 13px

In this coaching program, you will explore 5 key areas that will help you find the courage to take new risks and reap great rewards. You will examine the concept of risk and break it down into specific, manageable steps. And you will look at risk from different perspectives and explore

Choose a new product image


 **UPLOAD PHOTO** [Delete](#)

Photo dimensions: max. 1500x1500, 2MB

- ✓ Preview your Done 4 You Online Storefront (called ‘Products & Services’ on your Console website).
- ✓ Preview your Courage, Risks & Rewards Page on your Console website (it serves as a mini ‘sales page’ to sell your program online).
- ✓ Review the product name and settings (price, availability, etc).
- ✓ Review the way in which content is assigned to a product (so that the participant has access to the content upon purchase).
- ✓ Review the autoresponders messages that are assigned to the product.
- ✓ Determine how/where you’ll apply the ‘Buy Now’ buttons to sell the product on your website.



To place the ‘Buy Now’ button on an external website, go to the last tab within the product wizard (“Links & Buttons”) and, in the section “Buy Now button HTML code to insert button on a different website (not Coaches Console)”, click the link ‘Click here’, customize your button, copy the code and paste it in your external website.



QUESTIONS? Click on the blue question mark in the lower left of your system to open the Help window where you can watch relevant videos, search keywords, open a ticket or access live chat (when available).

Critical Key #12

It's More Than Just Your Back-Office: The Top 6 Additional Business Success Resources

Why this is critical:


By now we trust that you have realized your Coaches Console membership is much more than just a technology tool. With your membership you have access to many other resources to help you create a wildly successful and profitable business. Here are our **Top 6 Success Resources** available with your membership:

SUCCESS RESOURCE #1 - Free Tech Support from our Customer Support Team

At any time, no matter where you are in your Coaches Console system, click on the blue question mark in the lower left corner to access the Help window.

HELP


CLOSE



Live Support

We provide live support to help solve any issues you have.

Talk Now




Report an issue

Create a ticket for the issue you are having and we'll get it fixed asap.

Report


Type your question or search by keywords

SEARCH



How To Get Started In Your System [1:24]


This will help you get started in your Console System



Dashboard Overview [2:57]

Learn how to navigate you Console System

... SHOW ME MORE VIDEO TUTORIALS



Go to Support Center

>

THE COACHES CONSOLE GETTING STARTED GUIDE

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From the Help window you can:

- ✓ **Access video tutorials** relevant to where you're working in the Console system.
- ✓ **Type in your question or keywords** to search for relevant video tutorials and FAQs.
- ✓ **Open a ticket** with our Support Team for an answer within 24 hours (usually sooner).
- ✓ **Go to the Support Center** where you'll find video tutorials, FAQs, recorded training webinars, our Certified VA Marketplace and more!
- ✓ **Open Live Chat** to interact in real time with a member of our Support Team (when available).
- ✓ **Schedule a Zoom call** with a support team member (during the available times).

SUCCESS RESOURCE #2 - The Bootcamp Program

The Easy Breezy Coaching Business Bootcamp is a 7 module course designed to help you get your business set up and organized, quickly, while feeling completely confident about charging what you're worth (yes, even if you're still in coach training).

We give you the foundational business skills AND the knowledge you need for success. From your website, to contact management, scheduling to forms and documents, course and content delivery to training and support, this software gives you absolutely everything you need for exquisite client support. Nothing slips through the cracks. And YOU get to focus on coaching! Specifically, the Bootcamp is based around the Seven Best Practices for efficient business setup and long-term business success. And while we teach you the best practices, we simultaneously walk you through getting them set up and running in your Coaches Console System—so when we're done, your business is ready to roll!

You can access Bootcamp from your coach Dashboard > "Bootcamp" section > button "ACCESS YOUR BOOTCAMP MATERIALS".

SUCCESS RESOURCE #3 - Certified Virtual Assistant Support Services

We'd like to introduce you to our Coaches Console Certified Virtual Assistants (CVAs) who have been trained and certified in the setup and integration of The Coaches Console system to support you in getting up and running fast and efficiently. They're available for ongoing monthly support, too! [Meet the CVAs](#)

SUCCESS RESOURCE #4 - The Easy Breezy Coaching Business

A closed [Facebook group](#) where you can:

- ✓ Interact with our supportive community of coaches and service-based entrepreneurs
- ✓ Ask questions and get feedback from other members and our coaches

SUCCESS RESOURCE #5 - Business Success Blog

A business building resource where you'll find:

- ✓ Articles, case studies and additional wisdom from industry leaders and other successful coaches.
- ✓ [Click here](#) to access our blog.

SUCCESS RESOURCE #6 - Console Insider

The Coaches Console monthly newsletter filled with:

- ✓ Featured articles related to business success
- ✓ Business Building Tips
- ✓ Great resources and more!

SUCCESS RESOURCE #7 - Coaches Console Affiliate Program

Another way to build a successful business is through passive income. By being a member of The Coaches Console Affiliate Program, you can:

- ✓ Earn passive income to supplement your revenue
- ✓ Be rewarded for your referrals.

To sign up as a Coaches Console affiliate click here: [Affiliate Program](#)



Remember you are not alone! These Success Resources combined with the technology of The Coaches Console System ensures that you are on the right track to grow your practice faster than you could on your own.

Should you have any questions, submit a ticket to the Help Desk or post your inquiry on our [Easy Breezy Coaching Business Facebook Group](#).

With Pleasure,

Melinda + Kate