



Coaches Console

GETTING STARTED GUIDE 2022

Welcome to the Coaches Console!

Your Console has so many amazing features that will keep your business organized and efficient, while establishing trust and credibility with your prospects and clients.

There's a lot to explore, and that's why we've created this Getting Started Guide for you. It will walk you through the most critical features of your Console system so that you can get your business essentials up and running, support your clients, and attract new prospects.

Of course, there is much more your Console can do for you that goes beyond this Getting Started guide.

If you have a specific question, you can click on the Support Center at the bottom right of every page in your Console. From there, you can watch how-to videos, submit a help ticket, live chat, or schedule a call.

This guide only covers the basics of setting things up in your Console. If you want more support, to explore the full console, or to learn marketing strategies in more depth, our signature course and coaching program, "The Coaching Business System," was made for you! You can register here.

Now let's explore the key features of
your Coaches Console system!



CRITICAL KEY #1

Logging In & Connecting with The Community

CRITICAL KEY #2

Organizing Your Contacts, Clients & Prospects

CRITICAL KEY #3

Setting Up Your Online Calendar

CRITICAL KEY #4

Supporting and Communicating With Your Clients

CRITICAL KEY #5

Uploading & Delivering Your Free Gift

CRITICAL KEY #6

Setting Up Your Website

CRITICAL KEY #7

Your Billing Settings

CRITICAL KEY #8

Billing Your Clients Using Invoices

CRITICAL KEY #9

Sell Your Coaching Services Online With Your Console Shopping Cart

CRITICAL KEY #1

Logging In & Connecting with The Community

Let's get started! Here are the basics for logging in to your Coaches Console system, getting oriented, and joining our vibrant community.

Step 1

Logging Into Your Console System

- Go to CoachesConsole.com
- Click on "Log In" in the upper right corner of the page.

⚠ **NOTE** You will need to allow pop-ups for this website. Go to your web browser settings and set it to "always allow pop-ups from this website." Not sure how? Here are instructions from the most popular browsers:



Google Chrome



Apple Safari

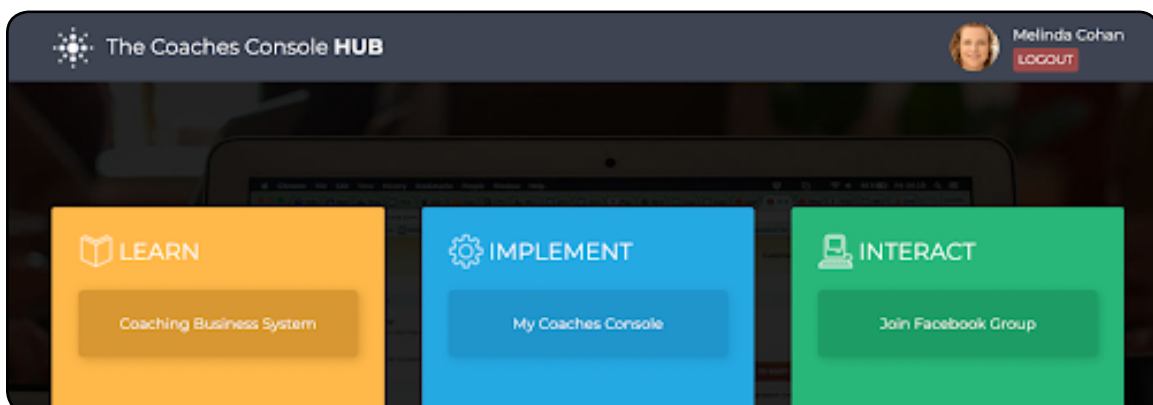


Mozilla Firefox

- Enter your user name and password, and click "Log Me In!"

Welcome to The Hub!

- From this central location, you can click the Blue Button "The Coaches Console" to access your Console System.
- If you are a student of Coaching Business System or Rocket Fuel you can also access your courses by clicking on the left side buttons



Step 2

Configuring Your Essential Settings

Once logged in adjust the following settings:

- **MY ACCOUNT** (upper right corner of your system dashboard) > 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.
- **COMMUNICATE** > Settings: configure your email address for communications and other options and click SAVE.
- **CALENDAR** > Settings: configure your calendar options here and click SAVE.

Step 3

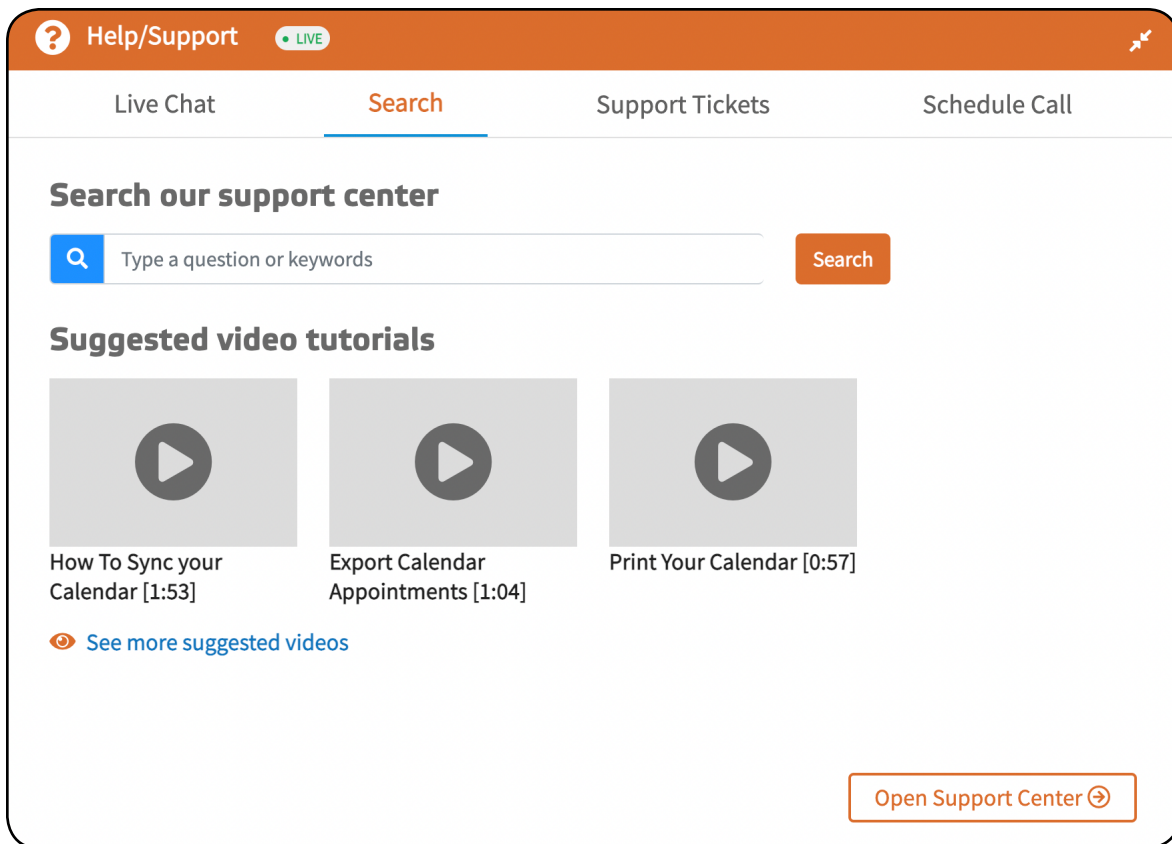
Get Help When You Need It

No matter where you are in your Console system, help is just a click away.

- Click on the orange "Help/Support" icon at the lower right of your system window.



- From there, you can
 - Watch on-demand video tutorials relevant to the feature you're working on in the system.
 - Enter a question or keywords to search our knowledge database.
 - Submit a ticket with our Support Team.
 - Live chat with a member of our Support Team (during available times).
 - Schedule a Zoom call with a support team member (during the available times).



- Visit our Support Center where you will find everything you need on your business journey - FAQs, Video Tutorials, training webinars, and access to the private Facebook group.

Step 4

The “Coaching Business System” Private Facebook Group

The #1 enemy of success is isolation. The more you can stay connected, the better your momentum and results will be. 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 and challenging business-building questions and share your celebrations so the whole community can join in supporting your journey..

- [Click here](#) to go to the Facebook group’s page
- From there, click “Join Group.” You will receive a notification when your request has been approved. This usually takes less than 24hours.
- Once you’re in the group, make your first post! Introduce yourself and share the next goal you want to accomplish in your business.

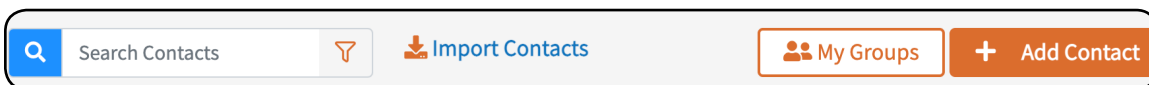
Organizing Your Contacts, Clients & Prospects



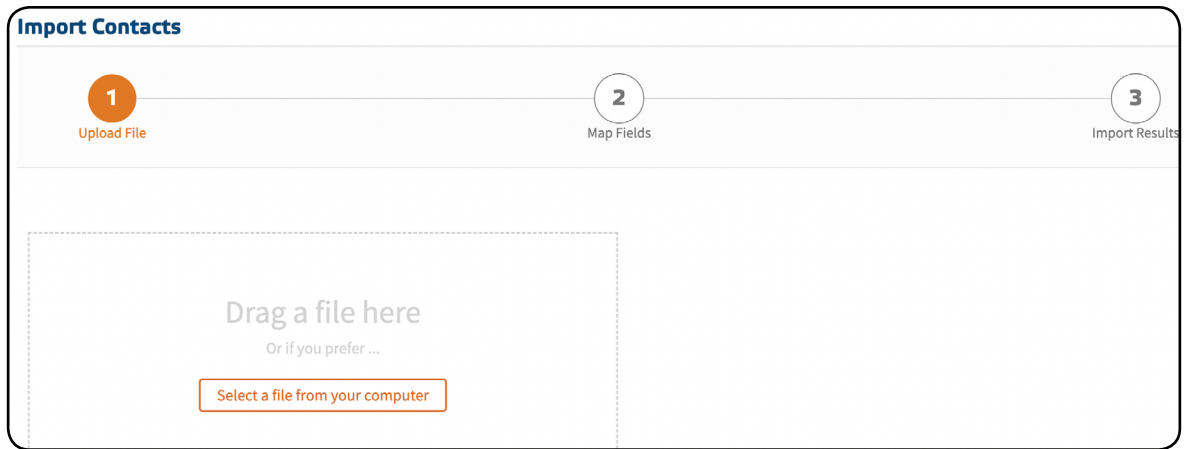
Getting prospects and clients entered into your Console system is where the magic begins to happen! You can then market to prospects and engage your clients in a comprehensive and professional way, using The Coaches Console as your practice management tool.

Step 1

Organize Your Contacts List



- Click “Contacts” on the left side of your Console screen to get started
- To **manually add a contact**, click the orange “Add Contact” at the top.
 - This is where you can enter as much information that you need to track about your contacts!
 - Assign a contact a “Status Type” in the top right of the “Add Contact” page.
 - See below for descriptions of the types
 - FOR NOW: Focus only on what’s necessary. Required fields are **red**.
 - For Prospects, all that’s required is their first name and email address. (to add an Active Client, create a username and password).
 - Enter their first name
 - Scroll down and select their currency and time zone
 - Scroll down and enter their email address
 - Then click “Save”
- To **import contacts**:
 - Export your contacts from your source software (wherever you store your contacts - Gmail, on your phone, in a spreadsheet, etc).
 - Save it as a CSV (Comma Separated Values) file.
 - Confused? Check out [this video](#) in the Help Center.
 - Then, in your Console, click on Contacts > “Import Contacts” link at the top.



- In the 'Import Wizard' page that opens > step '1. Upload File' use the button 'Select file from your computer or drag and drop the CSV file you want to import.
- Click the button "Map fields" in the bottom right corner to move to the next step.
- Match the Console client data fields with the data columns in your file.

⚠ IMPORTANT: All clients MUST either a first or last name and an email address. Entries without this data will be skipped. Multiple entries with the same name and same email address will only be entered once.

- After matching fields, click "Import Contacts".
- View the results. Take note of any skipped contacts. Go back and see if they are missing data fields.

Contact "Status Type" descriptions:

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

Segmenting Contacts into “Groups”:

- Whether you manually add a contact or you import contacts, you can further organize them into “Groups.”
 - Click on Contacts, then click on the orange “My Groups” button at the top.
 - Here you can add as many groups to better organize your contacts (contacts can be assigned to multiple groups).
- To add a contact to a specific group(s), click on Contacts > Click on the Contact Name > click the link ‘Edit Info’ at the top right corner of the client page. In the pop-up window that opens > section ‘Status and Groups’ > Groups > click on the drop-down list to select group(s) or type keywords for your groups to find and assign the client to those groups.

📌 **PRO TIP:** When you organize your contacts by either Status Type and/or additional Groups, the better organized your contacts are, the easier you can communicate the right information to the right people for optimal engagement, responses and conversions.

The screenshot shows a contact profile for Helen Ramsey. At the top, there is a navigation bar with "Contacts Home / Helen Ramsey" and a "Login as Helen" link. Below this is a header section with a profile picture, name "Helen Ramsey", status "Active", phone number "555-555-1212", email "melinda@perfectperiod.com", and a group assignment section for "Referral Partners Group Coaching Program" with a "+ 2 other group(s)" link. A globe icon indicates "US/ Eastern GMT -04:00" and an "Edit Info" link with a red arrow pointing to it.

The "Edit Personal Information" modal is open, showing the "Status and Groups" section. Under "Status", there are four radio button options: "Active" (selected), "Prospect", "Inactive", and "Buyer". Each option has a brief description: "Active clients are currently working with you and can log in to access your content", "Prospects are people you are trying to work with, but who have not signed up yet", "Inactive clients were working with you in the past but are not doing so currently", and "Buyer clients are contacts that bought something".

Under "Groups", there is a search bar with "Type to search" and a list of assigned groups: "Referral Partners", "Group Coaching Program", "Courage, Risks and Rewards Coaching Program (group)", "Total Results Coaching Package (group)", and "Membership Program". Each group name has a small orange 'x' icon to its right.

Setting Up Your Online Calendar

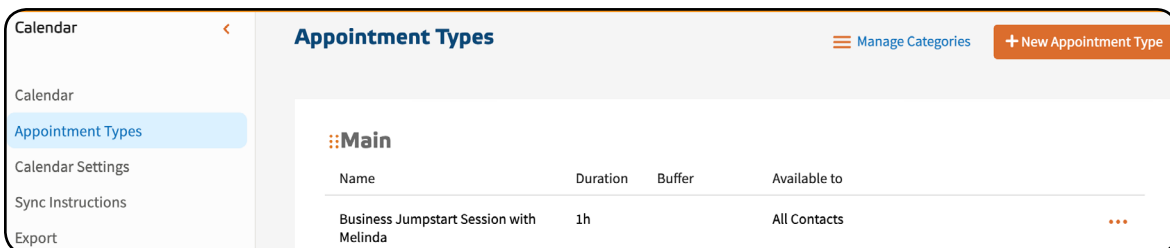


Make it easy for prospects to book an appointment, referral partners to schedule a time to strategize how to send you referrals, and clients to schedule/reschedule their sessions using your online calendar.

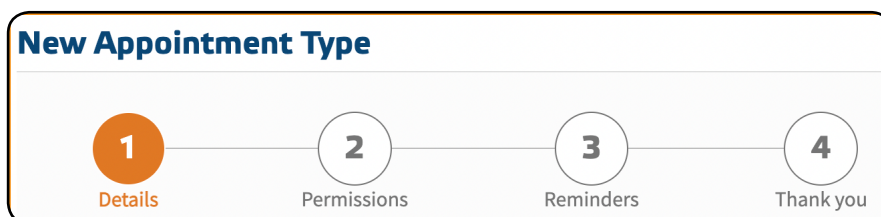
Step 1

Creating Appointment Types

When you create a specific appointment type, you can send a specific link to the right person so they book the right kind of appointment on your online calendar. Create the type and length of appointment people can book.



- Click “Calendar” on the left side of your console
- Click on the calendar Menu, then on “Appointment Types”
- In the top right, click the “New Appointment Type” button to open the wizard steps.
 - Name your appointment type. Your contacts will see this name, so make it clear.
 - As you scroll down, you can edit the unique link to schedule, include a link to a virtual meeting, and compose a message with any further instructions.
 - Set the duration of your appointment. You can set the length of the appointments themselves, as well as buffer time before and after each call for you to prep and/or follow up.
 - The other tabs along the top are pre-filled for you. Can can leave them as-is or make any relevant changes



Step 2

How To Schedule Blocks Of Available Time

Prepare your calendar in advance by adding blocks of available time for prospects and clients to choose from.

- Click “Calendar” on the left side of your console
- At the top of the top right corner, click the button “Create new”. Then in the pop-up window that opens to the right side:
 - 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 use the drop-down with options for a recurring series (daily, weekly, etc).

Appointment **Available Time**

Available for these Appointment Types

- Business Jumpstart Session with Melinda
- Referral Partner Strategy Session
- Signature Coaching Session
- Group Coaching
- Virtual Coffee Chat
- Virtual Coffee Chat with Melinda

[Create new appointment type](#)

Available starting at

End Time at

▼

[Cancel](#) [Save](#)

Step 3

Adding your Online Calendar to your Website

⚠ **NOTE:** For more about setting up your website, see Critical Key #6. You do not need to have the rest of your website fully finished in order to add your calendar to it.

Want to explore whether working with a coach is your next best step?

Book your 30-minute complimentary Business Success Strategy Session.

Book a Call

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 on the side column of your Coaches Console along with editing the text on the scheduling button:

- Click "Website" on the left side of your console
- Then select "Sidebar Boxes"

- Find the "Online Scheduling" box
 - Select "Edit" from the drop-down menu on the right and make the desired changes.

If you're using an existing external website and wish to place your online Console calendar link directly on your existing website:

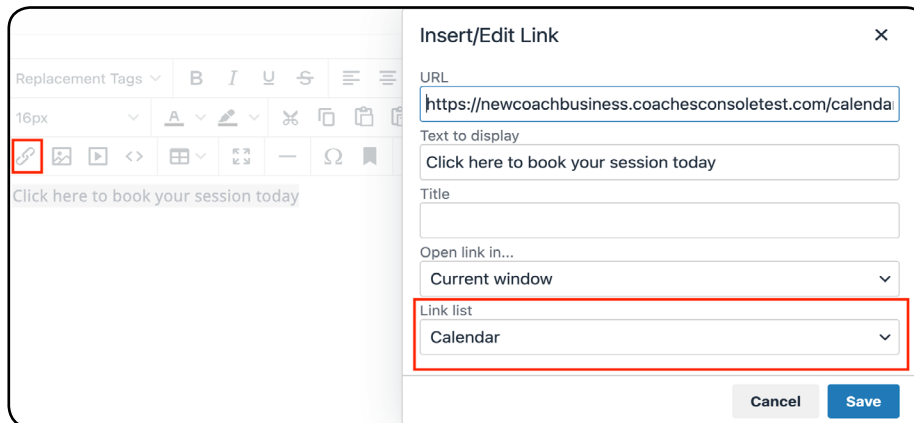
- Click "Calendar" on the right side of your console
- Then select "Calendar Settings" from the sidebar
- Scroll to the bottom, where you'll see "Direct Link to Your Coaches Console Online Calendar"
 - Copy/paste this link to your existing website.
 - If you are not familiar with how to do this, contact your website designer and provide them with this URL.

Step 4

Adding a direct link to your calendar in autoresponders and emails

- Within the body of the relevant autoresponder or email message, type the text "Click here to book your session today" (or some variation of this) in the body of the message.
- Highlight the phrase you just typed and click on the 'Insert/Edit Link' chain icon within the editor toolbar.

- A dialog box will pop up. From the “Link list” drop-down menu, select “Calendar”
- The link to your calendar is automatically inserted.
- Click ‘OK’.



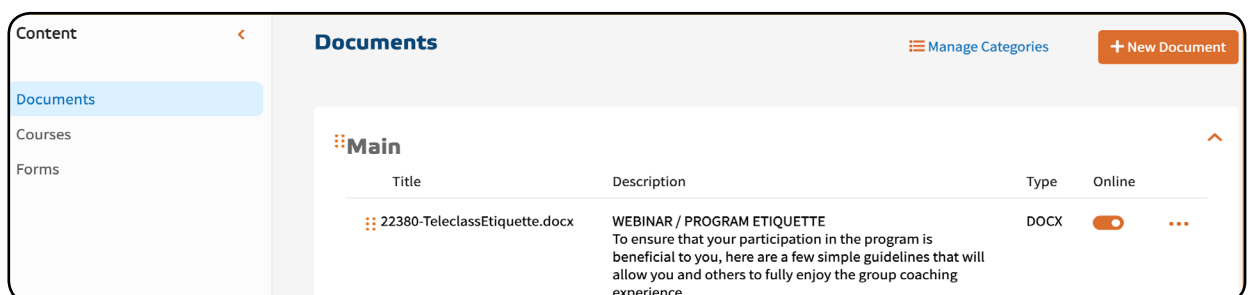
Step 5

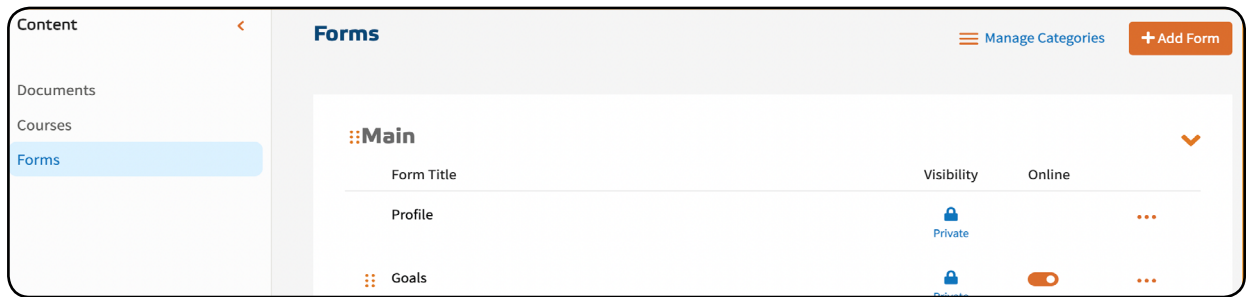
Review Forms & Documents



Several forms and documents are pre-loaded into your Console. You may wish to use some of these before, during, or after your contact's appointment. To review these:

- Click on “Content” on the left side of your console. Then select either “Forms” or “Documents”
 - Review any existing forms or documents pre-uploaded in your Console system.
 - Click on the name of a form, then “Preview” in the upper right to take a look
 - Customize existing forms or documents by reviewing and editing the content in the tabs across the top
 - Add additional forms or documents based on your business by clicking “Add Form” and “New Document” respectively at the top right





ⓘ **PRO TIP:** Use a “Session Prep Form” for your contact to complete prior to each appointment so you can make the most of your time together. When you create an “Appointment Type” can you select a form to be included in your automated appointment reminder each contact receives. They can then click the link, complete the form and their answers will be saved in your contact files and submitted to you ahead of time to review.

Supporting and Communicating With Your Clients

You can provide a seamless experience for your clients through your Console. Here's how to schedule a coaching session, take notes, provide follow-up, and track your hours for certification.

Step 1

How to book a client appointment or a group appointment

Contacts Home / Helen Ramsey

Helen Ramsey
Active

555-555-1212
melinda@perfectperiod.com

Referral Partners
Group Coaching Program
Courage, Risks and Rewards Coaching Program
+ 2 other group(s)

Appointments View All + New Appt

August 17	August 23	August 24
01:00 PM - 02:30 PM	02:00 PM - 03:00 PM	01:00 PM - 02:30 PM
Group Coaching Program	Coaching with Helen	Group Coaching Program
+ Add Note	+ Add Note	+ Add Note


- On the left side of your Console, click “Contacts”
- Then, either filter by status or group in the Filter List on the right side to find the client’s name (or use the search box in the top left to find the client by name)
- In the tabs across the top, select “Appointments”
- Then click “New Appointment” to open the scheduling pop-up window on the right side.
 - Choose the appointment type from the drop down list
 - Choose the date and start and stop times of the appointment.
 - Use the drop-down list with recurring options if you schedule a recurring appointment series.
 - Enter a description like the number to call or the zoom link to click at the time of their appointment) (these details will be displayed in the appointment reminder the client receives).

- Select your options:
 - Pro-bono
 - Send immediate confirmation email (select from template list)
 - The reminders will be sent according to how you schedule them in the appointment type notification settings.

Appointment Type

Business Jumpstart Session with Melin ▼

Date

 08/17/2022

Time

08:00 AM - 09:00 AM 1h

Does Not Repeat ▼

With

Helen Ramsey ✕ ▼

Title

New Appointment

Appointment Description

Cancel Save

Step 2

Taking Session Notes & Providing Follow-up Accountability

- In the “Appointments” section of the client profile you will see the next upcoming appointments. And you can use the “View All” link to the full list.
- To take notes, you can either click the “Add Note” button for an upcoming appointment or the “Notes” option in the drop-down menu to the right of an appointment in the full list.

Appointments [View All](#) + New Appt

Date	Time	Program	Action
august 17	01:00 PM - 02:30 PM	Group Coaching Program	+ Add Note
august 23	02:00 PM - 03:00 PM	Coaching with Helen	+ Add Note
august 24	01:00 PM - 02:30 PM	Group Coaching Program	+ Add Note

Past appointments

Date	Duration	Type	Notes
august 16 02:00 PM	60min	Signature Coaching Session	...
august 12 09:30 AM	60min	Referral Partner Strategy Session	Notes
august 10 01:00 PM	90min	Group Coaching	...

- In the pop-up window that opens > section “Private Notes”, you can type private notes (for yourself) that your client will NOT see.
- In the second text box (titled “Shared notes”), you can type the session notes to be shared with (and emailed to) the client.
- When you are done taking the private and/or shared notes, use the “Save” button at the bottom of the pop-up window.

PRO TIP: Automate the post-session follow up by selecting the follow-up notification option under CALENDAR > Appointment Types > edit the appointment type (that you created in Critical Key #3 specifically for your client appointments) > step “Reminders” > section “Follow-up messages” > button “Add notification”.

Details Permissions **Reminders** Thank You

Reminders (sent before appointment) + Add Notification

Notification Type	Template	Sent	
Appointment Canceled	Appointment Cancelled	Instant	...
Appointment Scheduled	Appointment Confirmation	Instant	...
Reminder	Virtual Coffee Chat Reminder	24 hours in advance	...

Follow-up messages (sent after appointment) + Add Notification

[+ Create new notification](#)

We recommend setting an automated follow up reminder using the “Post Session Recap” form pre-uploaded in your Console System and setting this automated message to be sent 30 minutes after the scheduled ending appointment time. Remember, there are over 30+ templates, forms and documents pre-uploaded in your system for you to use as is or customize as your own.

Step 3

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

- In Contacts > Client Name > Notes section, click the button “Add Note” to write a client log entry.
- The top 4 effective uses of your Client Log with your clients are:
 - In Contacts > Client Name > Notes section, click the button “Add Note” to write a client log entry.
 - The top 4 effective uses of your Client Log with your clients are:
 - 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.
- This is also where your clients can log in to your Private Client Portal and post questions to you for just-in-time online coaching, share celebrations, and upload homework for review.

Uploading & Delivering Your Free Gift

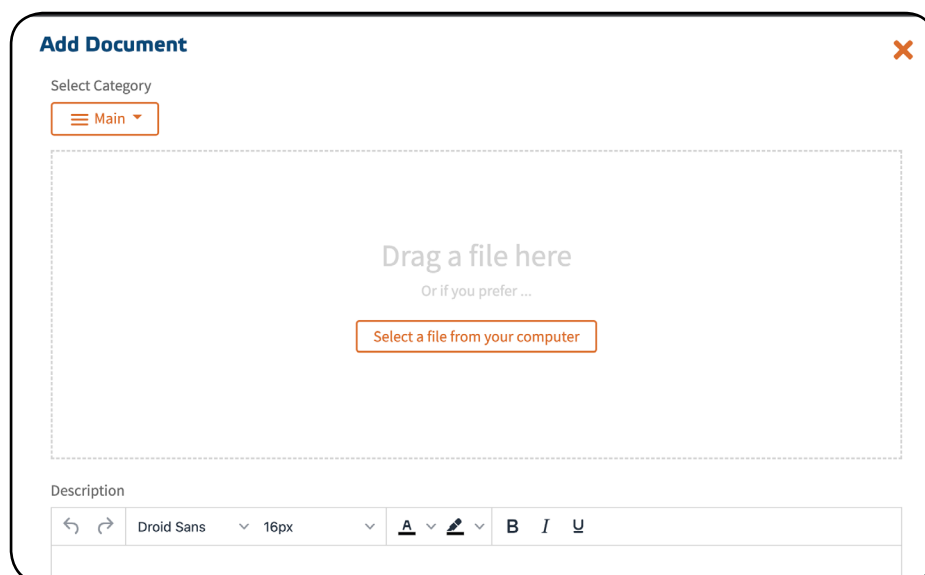
One of the best lead generation and list building tools is to offer a free gift (or a “lead magnet,” as some call it) on your website. This is a great way for people to learn more about you, your style, and the value you provide. And the more they know you, the more likely they are to book a sample session.

⚠ **NOTE:** These instructions assume you already have a Free Gift for your audience and that you understand how they work. If you don't have one yet, that's OK! We explain what they are and how to create one our “The Coaching Business System” course.

Step 1

Upload Your Document

- On the left side of your Console, click “Content”
- Then select “Documents” from the sidebar
- Click “+New Document” in the upper right corner. In the pop-up window that opens:
 - Click ‘Select a file from your computer’ (or drag the file over the upload area)
 - Select a category for the document (or leave the default ‘Main’)
 - Enter into the Description section the title of your document and (optionally) a short 2-3 sentence description.



Step 2

Create Your Opt-In Form & Autoresponders

- On the left side of your Console, click “Website”
- Then select “Opt-In Forms” from the sidebar
- Click on “Free Gift,” which has been pre-loaded into your existing opt-ins
 - You can edit the settings and messages in the tabs across the top

Edit Opt-In Form

Details Autoresponders Thank You Page Opt-in Code

Name
Free Gift

Category
Main ▾

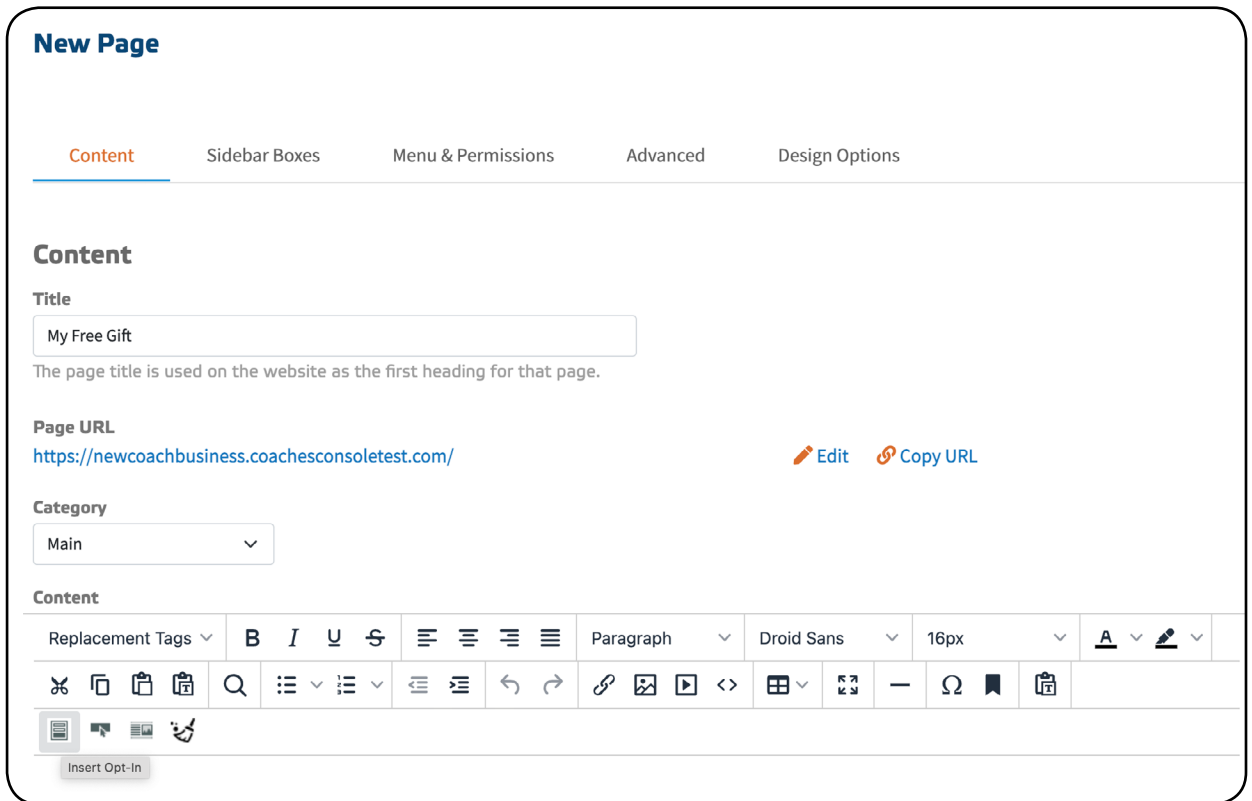
- You can also create a new opt-in and autoresponder by clicking “+New Opt-In”
 - Type in a name for your opt-in form (which also automatically creates a corresponding ‘Group’ in your contact list)
 - Create the series of autoresponder messages to be automatically sent when using this opt-in form
 - Customize the ‘Thank You’ page displayed after someone opts into your mailing list

Step 3

How to use the Opt-In form on your Coaches Console Website

ⓘ **NOTE:** For more on customizing your website, see Critical Key #6. You do not need to have your website fully set up in order to link your Opt-In form to it.

- You can choose on what page or sidebar box to place your opt-in form
- To add a new page:
 - Click “Website” on the left side of your console
 - Then click “Pages” in the sidebar
 - Click “+Add page” in the top right
 - 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 your Opt-In form.



- To add a new sidebar:
 - Click “Website on the left side of your console
 - Then click “Sidebar Boxes” in the sidebar
 - You can add a new sidebar or edit an existing one to include your opt-in form

Step 4

How to place your opt-in form on an external website

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

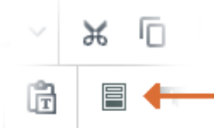
- Click “Website” on the left side of your screen
- Then click “Opt-in Forms” in the sidebar
 - Edit the opt-in form you want (via the drop-down menu to its right side)
 - Then select “Opt-in Code” from the tabs at the top
 - Under “Use on external website,” click “Copy Code”
 - Paste that code into the back-end admin area of your external website
- For more help, ask your web developer

Edit Opt-In Form

Details Autoresponders Thank You Page **Opt-in Code**

Publish your opt-in form

To use on your Coaches Console website



1. Go to Website -> Pages and Edit the page where you want to place your Opt-In
2. Click on the insert Opt-In button in the visual page editor.
3. Select the Opt-in form you want to insert on the page

To use on an external website, copy the HTML code below

HTML code (to embed in your site) [Copy Code](#)

```
<form method="post" action="https://newcoachbusiness.coachesconsoletest.com/optin">
```

⚠ PRO TIP: If you want a quick start or haven't created your free gift yet,, there's also a template, “The Wheel of Life,”pre-uploaded in your system that you can use as is or customize for your audience. To find it, click “Website,” then “Documents.” Find the document called “The Wheel of Life,” and click on the title to download an editable Word document.

Setting Up Your Website

You've now set up the essentials in your Console system. You've organized your contacts, set up your calendar and free gift, and know how to support and communicate with your clients before, during, and after your sessions. Congratulations!

But your Coaches Console system is capable of so much more! So let's take your communication and marketing to the next level with your website.

While 40% of our members already have an existing website, a 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:

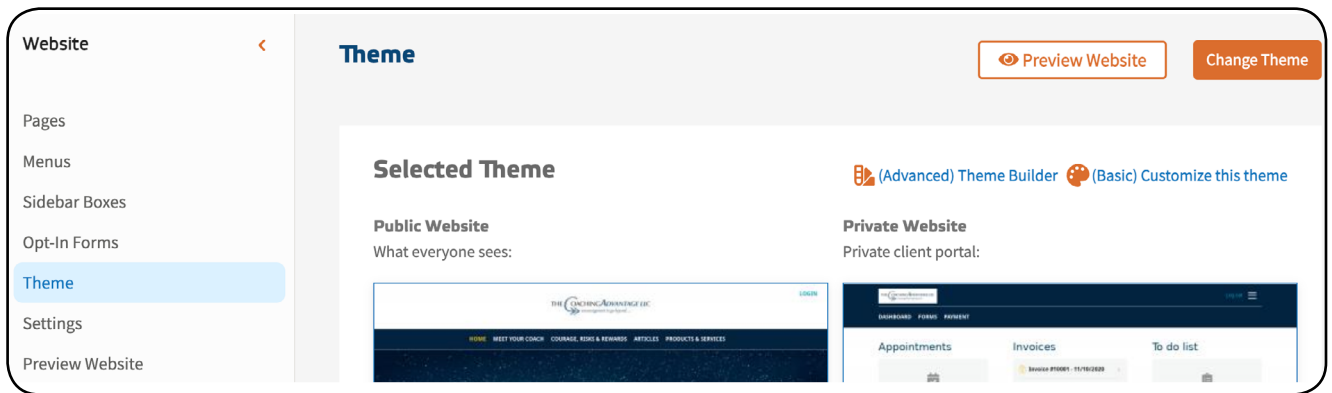
- ① As a stand-alone public website for marketing purposes, to get you started;
- ② As a private client website to integrate with an existing website;
- ③ Full integration with your existing website.

No matter which option applies to you, in Critical Key #1, you set up your Website Prefix URL. Now you can select a theme and set up the basic branding of your Coaches Console website no matter how you're using it.

Step 1

Choose Your Theme

- On the left side of your Console, click "Website"
- Then select "Theme" from the "Menu" sidebar
 - Click CHANGE THEME 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



Step 2

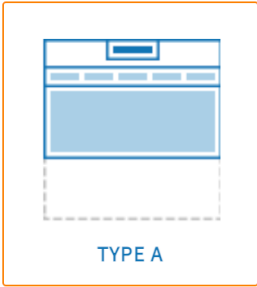
Customize Your Theme

- Once you have selected a Theme, you can customize it
- Click on “Customize this theme”
- Use the options in the sections at the top to customize. A live preview of your public and client website to the right shows changes in real time.


Customize Theme

Header Style
Header Options
Header Photo
Color Pallete
Page Layout


Header Style




TYPE A



TYPE B



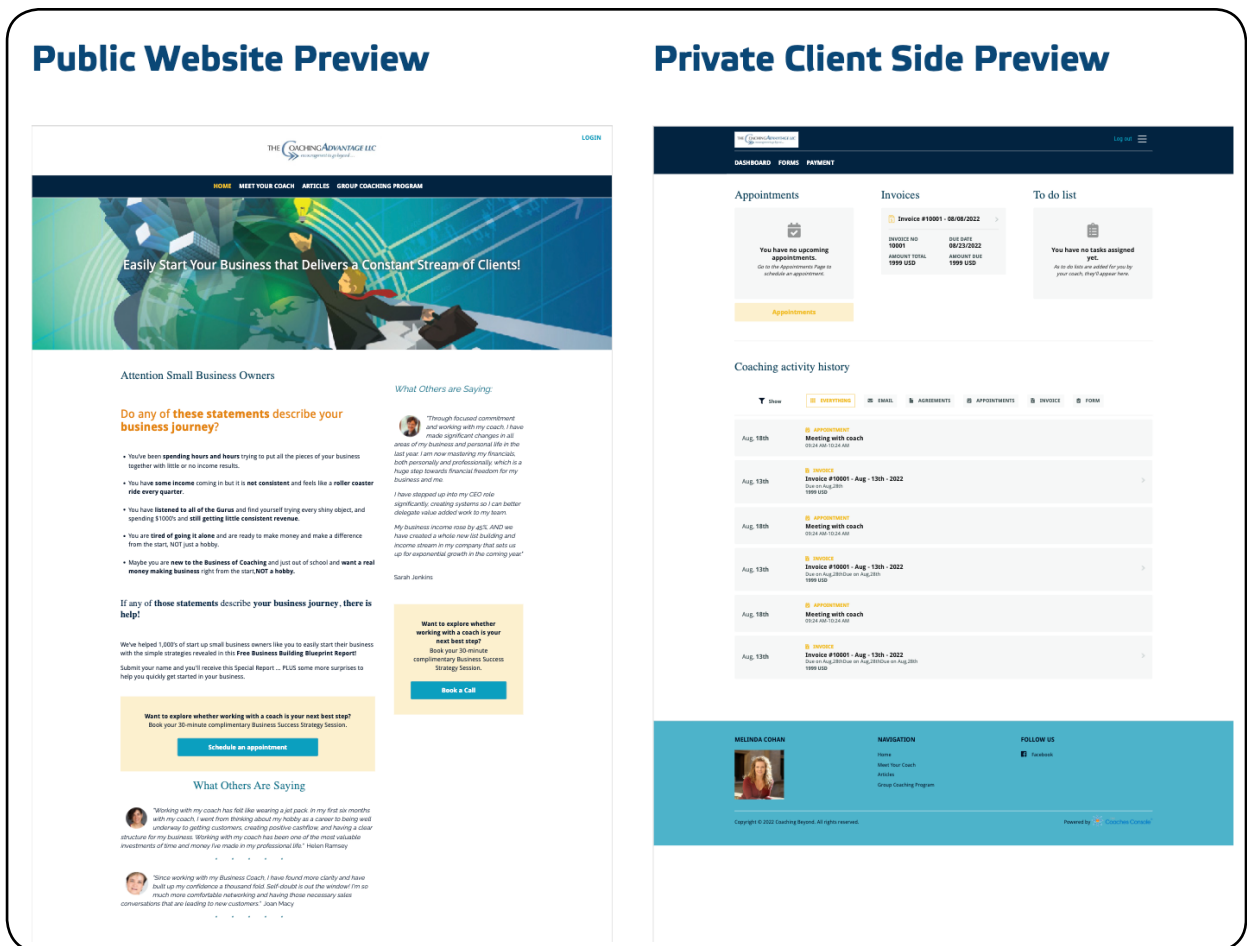
TYPE C



TYPE D

- Choose your header style
- Choose your header options
- Upload your logo (when you have one)
- Choose a header image, or upload one of your own
- Choose a color palette

- Choose a page layout
- While you make these changes, on the left side you can see their effect as a preview of the public and client portal
- Save your theme, and you're finished!



Step 3 Review Pages & Menus

A “Page” contains a segment of content, such as an “About Me” page, or the homepage. A “Menu” is the navigation label that people see on your website to click and access the content of a particular Page.

- Click “Website” on the left side of your Console screen
- Click on “Pages” in the sidebar
 - 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 by clicking on “Menu” in the sidebar
 - You can set menus to be public and accessible by anyone who visits your website or it can be set to Private so only clients that log in to your Private Client Portal can access after logging in.

⚠ **PRO TIP:** Creating a website can become a time-consuming trip down a rabbit hole! Just focus on getting the basics for now. There are 3 core pages that’s needed to get yourself out there, connecting and enrolling clients:

- Home Page (with a link/button for people to opt in to your mailing list)
- Bio Page (with a link/button for people to book a Discovery Call with you)
- Testimonials Page (as you collect them) as social proof for the transformation that’s possible with your coaching and support.

Start with these three so you can begin to put yourself out there. Then build momentum and get feedback before you start creating the rest of your website.

If you get stuck [here’s how to get help or additional resources](#). Our course, “The Coaching Business System” also walks you through how to build your website and create the content for each section in more detail.

Your Billing Settings

You want to get paid for your packages, products, and services! In order to do that - and begin to receive payments from clients - there are a few settings that need to be in place first.

Step 1

Getting to Know Your Basic Billing Settings

- Click “Billing” on the left side of your Console screen
- Then click “Settings” from the sidebar
- Let’s go through the tabs at the top:

Billing Settings

Merchant & PayPal Company Accounts Currency & Tax Recurring Billing

PayPal

Your PayPal email

No PayPal? [Create a free account now](#)

- *Merchant & PayPal* - This is how your clients will pay you securely online.
 - You can integrate PayPal, Authorize.net, or Stripe. If you currently use one of those, enter the relevant information and click “Save.”
 - If you do NOT currently use one of these, you can create an account. Follow the links on the page for detailed instructions.
- *Company Accounts* - This allows you to categorize the type of revenue being processed when you invoice your clients so you can track what packages and programs are profitable in your business.
 - To add an account, click “Add Account.” Then name the account and add a label.

- **Currency & Tax** - A number of international currencies are supported through your Console system. Choose your default currency.
- **Recurring Billing** - If you plan to sell packages, programs, or products with payment installments or recurring membership fees using your Console Shopping Cart, then your merchant account must support recurring payment processing.



Click the link to learn how to upgrade your personal account, get your API credentials, and set up IPN. Then enter the information in the field.



Click "Validate" to verify your CIM (Customer Information Management module, which needs to be activated in advance in your Authorize.net merchant account).



For Stripe, that is handled directly in your Stripe account and nothing else needs to be done in your Console System.

Step 2

Setting Up Coaching Agreement Templates

- From "Billing," click "Agreements" in the sidebar.
- Four agreement templates have been pre-uploaded for you to use or customize. Each addresses different coaching levels, durations, and types of clients. These templates are based on a package model of pricing. You can also create templates based on hourly, monthly, or project rates.

Agreement Templates

+ New Client Agreement
+ New Agreement Template

Title	
Jumpstart Coaching Package (3 Months)	⋮
Total Results Coaching Package (6 Months)	<div style="border: 1px solid #ccc; background-color: #fff; padding: 5px; font-size: 0.9em;"> <div style="padding: 2px 5px; background-color: #f2f2f2;">Edit</div> <div style="padding: 2px 5px;">Copy</div> <div style="padding: 2px 5px;">Delete</div> </div>
Private Coaching Per Session	⋮
Corporate Client Agreement	⋮

- Let's take a look at a template
 - Edit a template to get started
 - There are 7 tabs across the top

Jumpstart Coaching Package (3 Months)

Details
Payment Options
Content Permission
Terms & Conditions
Email/Thank You
Autoresponders
Preview & Send

Details

Choose Template

Jumpstart Coaching Package (3 Months) ▼

Agreement Title

Jumpstart Coaching Package (3 Months)

- **Details:** Here you can change the title of the package, or even the template you are using
- **Payment Options:** Here you can set how the client will pay (monthly, or full amount, or allow the client to choose), the agreement duration, amount(s), how the monthly invoices will be generated (manual or automated invoicing). If automated, you can select when the invoice will go out, and other details.
- **Content permissions:** Assign the client who signs the agreement to a group and provide permission-based access to various types of content (courses, pages, forms, documents).
- **Contract Terms:** These are the written terms of your contract. A template is preloaded for you. You can use it as is, customize it, or write your own.
- **E-Mail/Thank You:** The email is the message that will include the contract agreement to your clients. You can use the template as is, customize it, or write your own. The Thank You page is displayed right after your client accepts the agreement. Use the template or write your own.
- **Autoresponders:** Upon signing the agreement, the client can be subscribed to autoresponders that you specify here.
- **Preview and Send:** Here you can review what will happen from your client's perspective.

Billing Your Clients Using Invoices

Part of being a savvy business owner is setting up professional ways to invoice your clients, process payments, issue receipts, and track your finances. Here's how your Coaches Console system helps.

Step 1

Create Your Invoices And Set Up Payment Options

Create Invoice

Invoice Details

Starting Invoice Number

Invoice Date Due Date

Add Clients

Line Items

Description	Account	Quantity	Unit Price	Discount(%)	Total
<div style="display: flex; justify-content: space-between; align-items: center;"> + Add Line Item + Bill For Coaching </div>				From <input type="text" value="08/01/2022"/> To <input type="text" value="08/31/2022"/>	

Invoice Note

Choose Template

16px

- On the left side of your Console system, click "Billing"
- Click "Invoices" from the sidebar, then the "+Create" button in the top right corner to create a manual invoice
- Enter the invoice # (or your Console system will provide a number and it automatically tracks this for you), invoice date and due date, then select/verify the interval for delivering the services.

- Add the client(s) you wish to generate an invoice for and generate the draft invoice(s).
- 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.
- Or click the “Add Miscellaneous” button to create an invoice line for amounts outside or not related to signed agreements.
- Click “Generate Draft(s)” button in the bottom right corner 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

You can see every invoice created for each client. You can view the details of each invoice, re-send an outstanding invoice or a receipt for a paid one, and manually process a payment if needed. The invoices will be automatically marked as paid only when the clients (or you on their behalf) pay through their client portal using either Paypal, Stripe, or Authorize.net.

Invoice Date	Due Date	Inv.#	Description	Amount	Paid	Balance
07/31/2022	07/31/2022	100		\$2,400.00	\$0.00	\$2,400.00
06/30/2022	07/30/2022	6		\$2,600.00	\$0.00	\$2,600.00
01/13/2022	01/13/2022	5		\$900.00	\$0.00	\$900.00

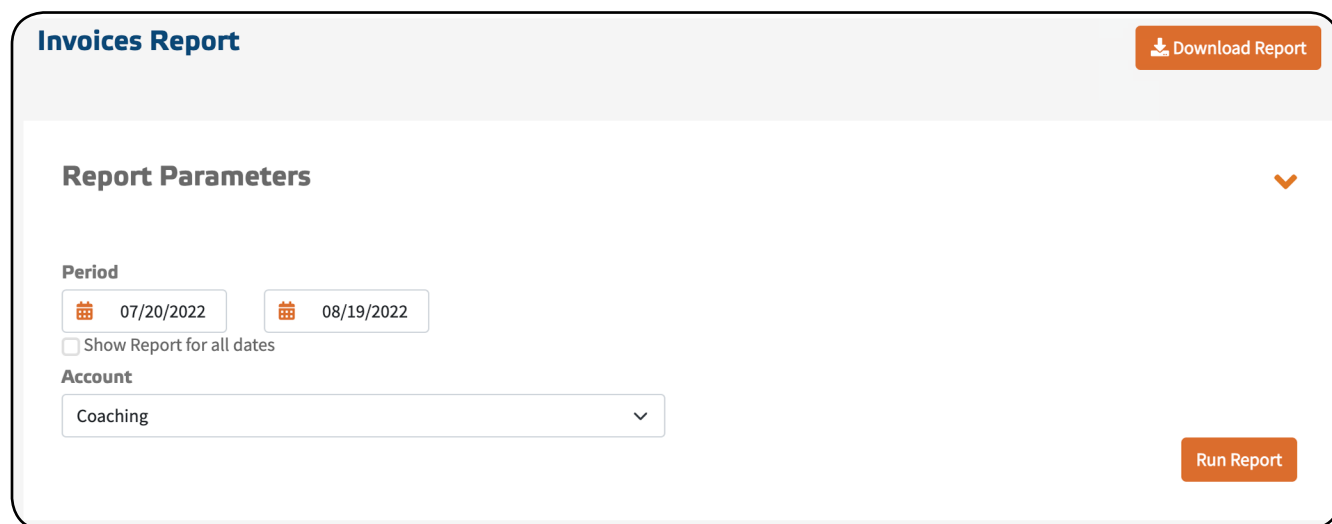
- On the left side of your Console, click on “Contacts”
- Then either type the client’s name in the “Search Contacts” field at the top left or use the client statuses and groups on the right side (Active, Inactive, Prospects, etc) to filter and select the client’s name.
- On the right side, scroll down to the “Invoices” section and click the “View all” link to get to the invoices list.

- You can tweak a date range for displaying the invoices with the “Filter List” on the right side (the default is to display the invoices in the last year).
- Click the 3 dots icon to the right of an invoice to view, resend, delete, or save the invoice as a PDF.
 - If you click “View,” you can **send a receipt** to the client. Just scroll down and click “Email to Client”

Step 3

Review The Invoices Report

- On the left side of your console, click “Reports”.
- Then click “Invoices/Payments” in the sidebar. The first report is the Invoices Report.
- Select a date range to view any/all invoices that have been created in that interval, select the income account, and click “Run report” 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.



The screenshot displays the 'Invoices Report' interface. At the top right, there is a 'Download Report' button. Below this is a section titled 'Report Parameters' with a downward arrow. Under 'Period', there are two date pickers: '07/20/2022' and '08/19/2022'. Below the date pickers is a checkbox labeled 'Show Report for all dates'. Under 'Account', there is a dropdown menu currently showing 'Coaching'. At the bottom right, there is a 'Run Report' button.

Sell Your Coaching Services Online With Your Console Shopping Cart

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 entry level training classes or offers 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 with their credit card.

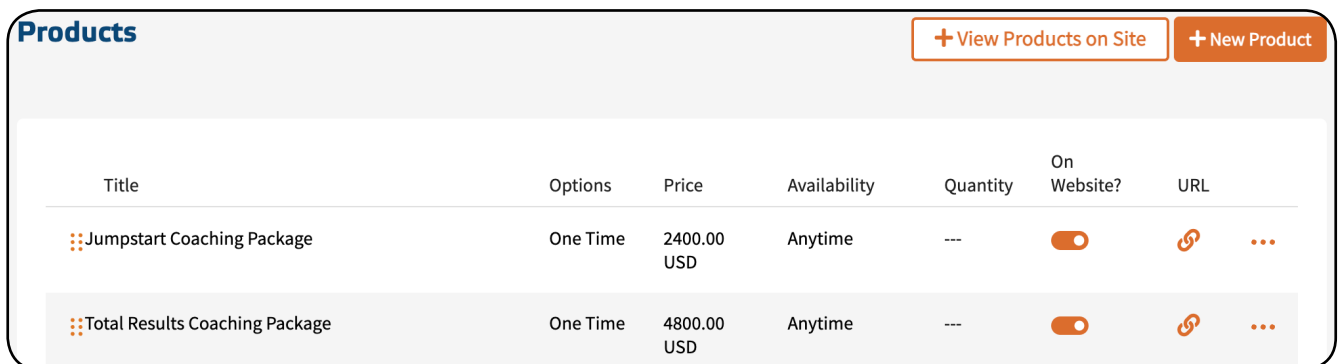
⚠️ NOTE: The Shopping Cart is a separate component of your Console system. If you have the Core Basic Console System membership option and have not upgraded your system to the Total Console System, you will not have access to the shopping cart (or online course content) features. You will not be able to complete the following steps until you upgrade and add the Shopping Cart to your membership option. Click “Cart” on the left side of your Console, then “Products.” You will come to a screen that prompts you to upgrade your Shopping Cart, with either monthly or yearly payments.

If you have the Total Console System and/or have upgraded your Core Basic package, follow the steps below to make it easy for clients to sign up for your offers online.

Step 1

Preview Your Done4You ‘Products & Services’ Page

- Click “Billing” on the left side of your Console
- Click “Products” on the sidebar
- Then click the button “View Products on Site” in the top right corner



Products							+ View Products on Site	+ New Product
Title	Options	Price	Availability	Quantity	On Website?	URL		
Jumpstart Coaching Package	One Time	2400.00 USD	Anytime	---	<input checked="" type="checkbox"/>	🔗	...	
Total Results Coaching Package	One Time	4800.00 USD	Anytime	---	<input checked="" type="checkbox"/>	🔗	...	

Step 2


Turn Your Initial, Entry Level Coaching Package Into A Product

- Click “Billing” on the left side of your Console
- Click “Products” on the sidebar
- Then click “+New Product” in the top right corner

New Product

1 Details 2 Payment Options 3 Content 4 Terms & Conditions 5 Thank You 6 Autoresponders 7 Publish

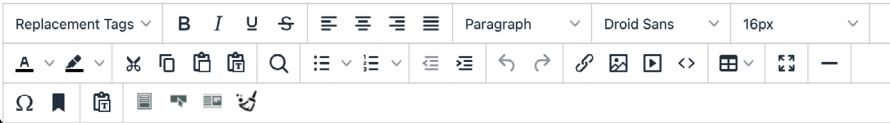
Product Name



Upload Image

Product Description

Replacement Tags B I U Paragraph Droid Sans 16px



- In the *Details* step, you name the product, upload a photo for it and write a description.
- In the *Payment Options* step, you set the price (full amount or a recurring scenario), product availability for sale, # of buyers, etc.
- In the *Content* step choose which content is assigned to a product (so that the buyer has access to the selected, private content upon purchase: courses, pages, forms, documents), and also specify the conditions for the beginning and end date of access.
- The *Terms & Conditions* step is where you can enter the text that describes the terms and conditions that may apply to your services sold via the product and that the buyer needs to acknowledge and agree with before purchase.
- Create/edit in the *Thank You* step a page that buyers see after purchase.
- Create the unique series of messages in the *Autoresponders* step, that are assigned to this product to automate the delivery, upsell and/or follow-up.
- Determine in the *Publish* step how/where you'll apply the 'Buy Now' buttons to sell the product on your website.

Step 3

'Rinse and Repeat' - Turn Your Additional Packages, Programs, and Offers Into A Product

- Click "Billing" on the left side of your Console
 - Click "Products" on the sidebar
 - Then click "+New Product" in the top right corner
 - In the *Details* step, you name the product, upload a photo for it and write a description.
 - In the *Payment Options* step, you set the price (full amount or a recurring scenario), product availability for sale, # of buyers, etc.
 - In the *Content* step choose which content is assigned to a product (so that the buyer has access to the selected, private content upon purchase: courses, pages, forms, documents), and also specify the conditions for the beginning and end date of access.
 - The *Terms & Conditions* step is where you can enter the text that describes the terms and conditions that may apply to your services sold via the product and that the buyer needs to acknowledge and agree with before purchase.
 - Create/edit in the *Thank You* step a page that buyers see after purchase.
- Create the unique series of messages in the *Autoresponders* step, that are assigned to this product to automate the delivery, upsell and/or follow-up.
- Determine in the *Publish* step how/where you'll apply the 'Buy Now' buttons to sell the product on your website.

Step 4

Preview Your Done4You 'Products & Services' Page

- Click "Billing" on the left side of your Console
- Click "Products" on the sidebar
- Then click the button "+View Products on Site"

For more training and information on the Shopping Cart and creating products, search for the following phrases in the **Support Center**:

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.

This Getting Started Guide has covered the basics of what you need to get your Coaches Console system up and running, so that you can grow your list and manage your clients. But your Console is capable of much more than we've covered here!

Take some time to explore what else it can do, such as send newsletters or create online courses. Visit the support center for helpful videos about each part of your Console. Or register for our course, The Coaching Business System, for a full introduction to the Console, along with business and coaching strategies, personalized support, and community learning.

And remember that you are not alone! Reach out to Support or ask your peers in our Coaching Business System Facebook Community.

Here's to your success!