THE Coaches Console®

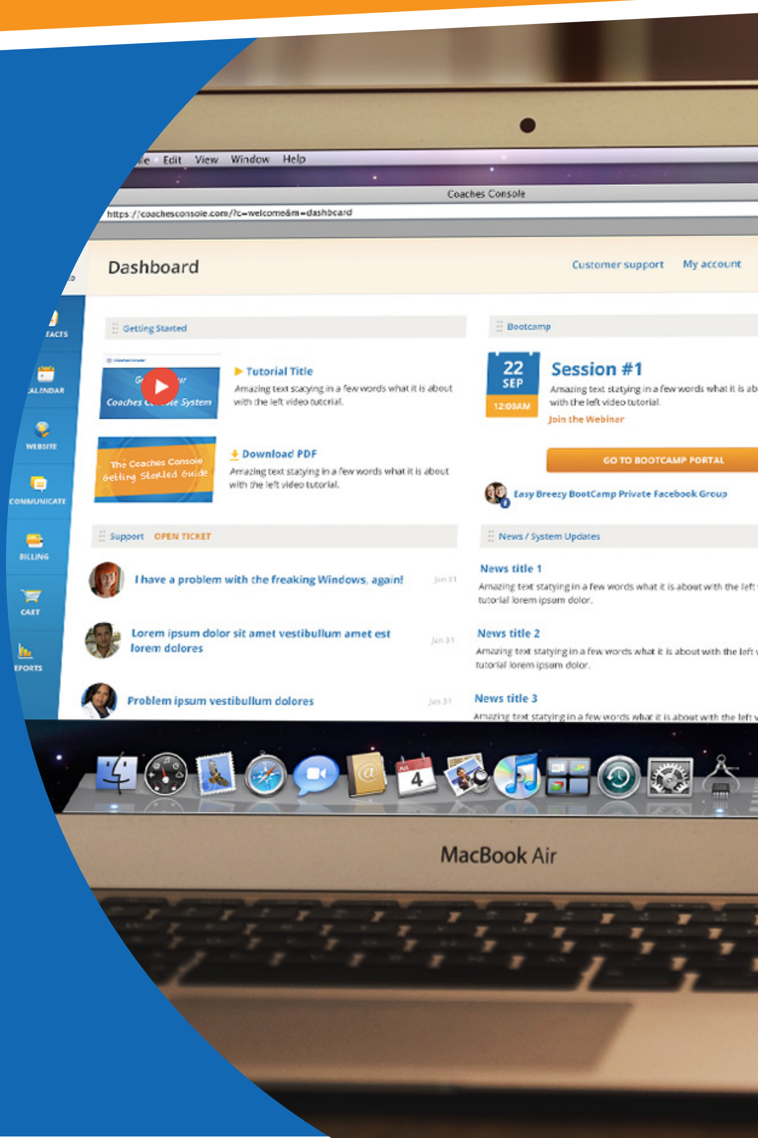
Powerful On-Line Tools To Drive Your Coaching Practice

The Coaches Console Getting Started Guide

Learn:

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

Keep reading the DIY steps below to get started now.



Critical Key #1

Getting Oriented, Logging In & Connecting With The Community

STEP 1

New Member Guided Tour

Click here to watch the recording: New Member Guided Tour. This will give you a big picture overview of how the system can work for you before we take you into the details. In this 25-minute tour you will get oriented into your new back-office!

STEP 2

Logging Into Your Console System

Members Login

You can access this link at any time from our home page by clicking on "Members Login" in the upper right corner of the Console screen.

Once you're logged into the Console system, you will need to Allow Pop-ups for this website. If you are on a PC, you can go to your web browser settings to "Pop-Up Blockers" and "always allow pop-ups from this website".

STEP 3

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) and configure each of the setting options within each tab.

- **Coach Profile:** set up the basic settings used through all features in your Console system.
- **Website Settings:** configure options for your website, URL, footer, contact information, integration with social media, and more.
- **Communication Settings:** configure notifications from client updates, add alternate contact phone numbers, etc.

- **Calendar Settings:** set when your appointment reminder is sent to contacts, choose display modes and date formats, etc.

- **Notification Templates:** Customize the automated system notification emails that are sent to your clients, such as the appointment confirmation and reminders, password reminders, etc.

STEP 4

The Coaches Console Member's Mastermind Private-Group Facebook Forum

This is a **private forum 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 the Business Building Vixens" (Melinda and Kate) and post 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 today.

STEP 5

Live Support Calls Every Tuesday At 2:00pm Eastern / 11am Pacific

You are invited to join in a live members-only call with co-founders Melinda and/or Kate every Tuesday at 2:00pm EST as they walk you through utilizing the features within your Console system.

- Receive step-by-step guidance on how to use the various features of your Coaches Console System.

- Learn tips and tricks on making the most of your Coaches Console System.

- Discuss challenges in using your Coaches Console and how to work through them.

- Discover how using the various features of your Coaches Console system impacts your bottom line success on coaching more clients and earning more money.

- Have access to a live Q&A session with Melinda and/or Kate to ask specific questions about your system.

The current topics are listed on the dashboard of your Console system where you can register. Or click here to view the upcoming topics as well as all archived training calls.

Critical Key #2

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

Why this is critical:

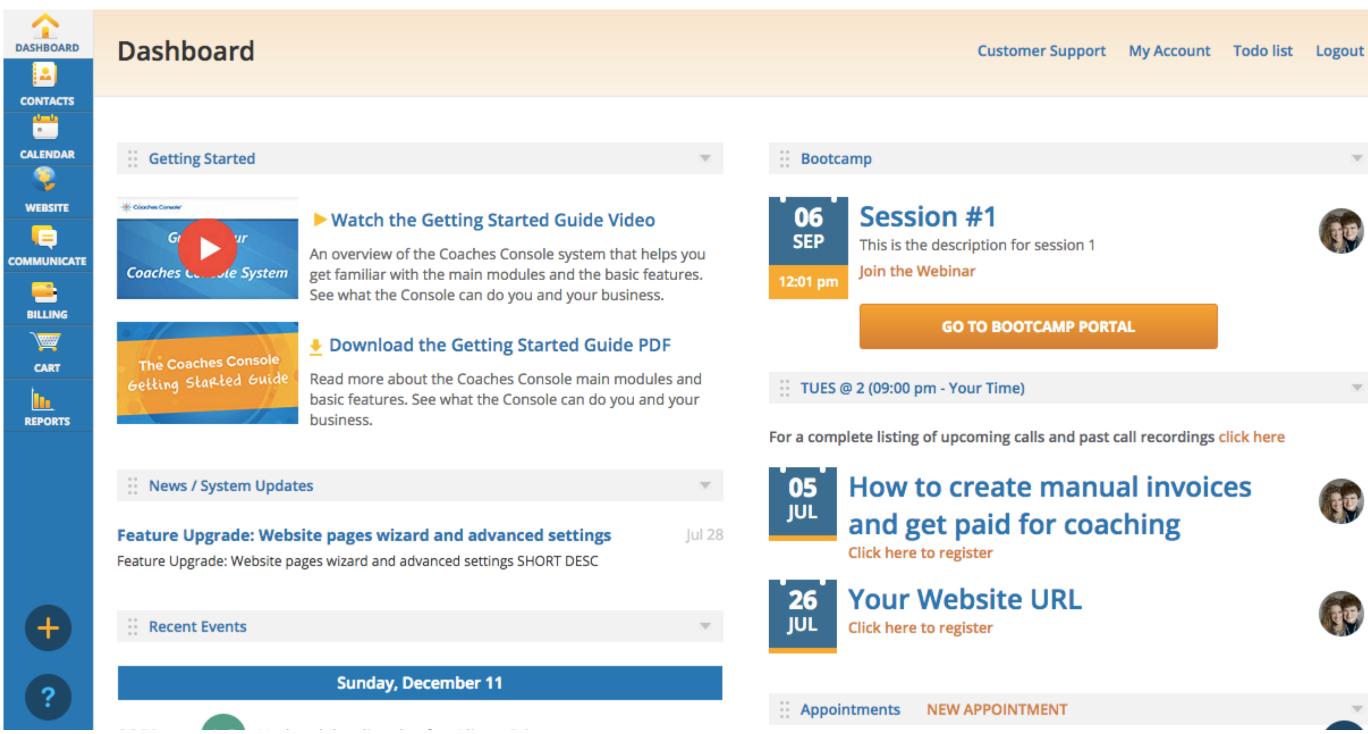
While 40% of our members already have an existing website, the key feature of your Console website is the ability for you and your clients to interact and deepen the coaching experience. Even if you're just getting started, this 'Private Client Website' component of your Console system is where you will 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:

A. As a stand-alone website for public, marketing purposes, to get you started;

B. As a private client website to integrate with an existing website;

C. Full integration with your existing website.



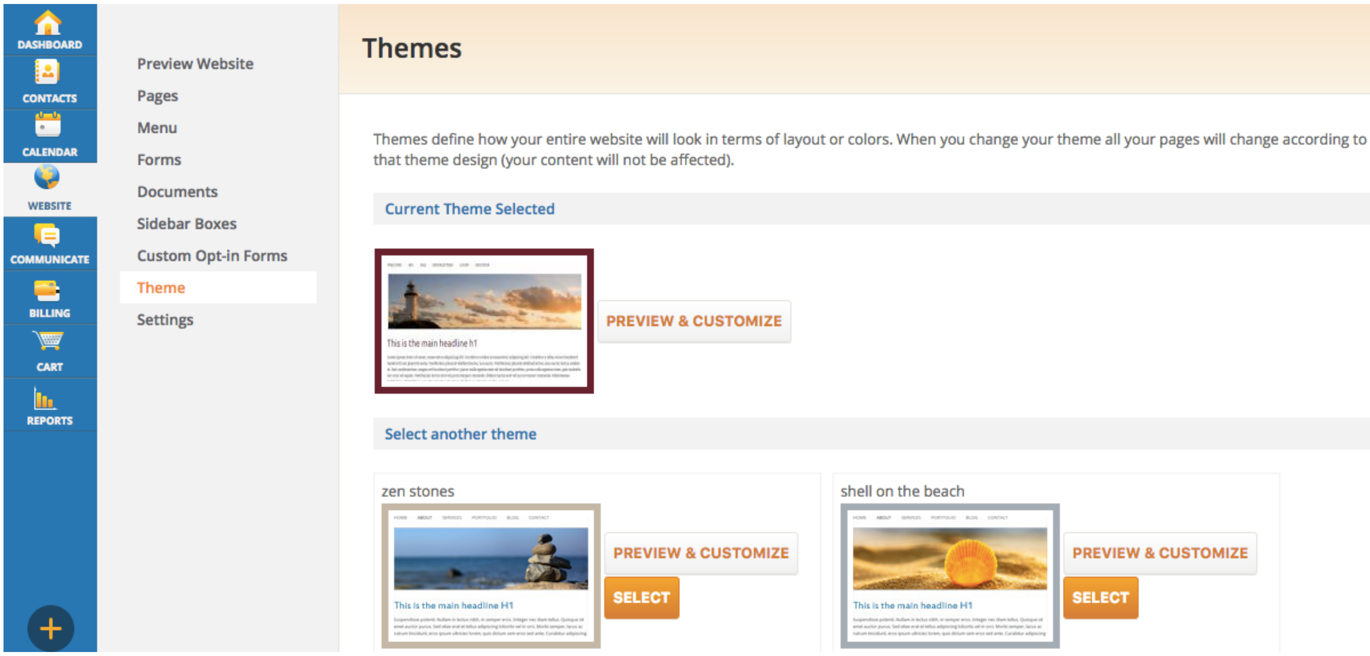
Below you can learn how to set up the basic branding of your Coaches Console website no matter how you're using it.

STEP 1

Choose Your Theme.

Click on WEBSITE → THEME

Select an existing theme and/or customize it to make it your own:



- ✓ Upload your logo
- ✓ Choose your background colors
- ✓ Select a header image or upload your own
- ✓ Set default font style, sizes and colors
- ✓ Upload your headshot

STEP 2

Review Pages & Menus

Click on WEBSITE → PAGES

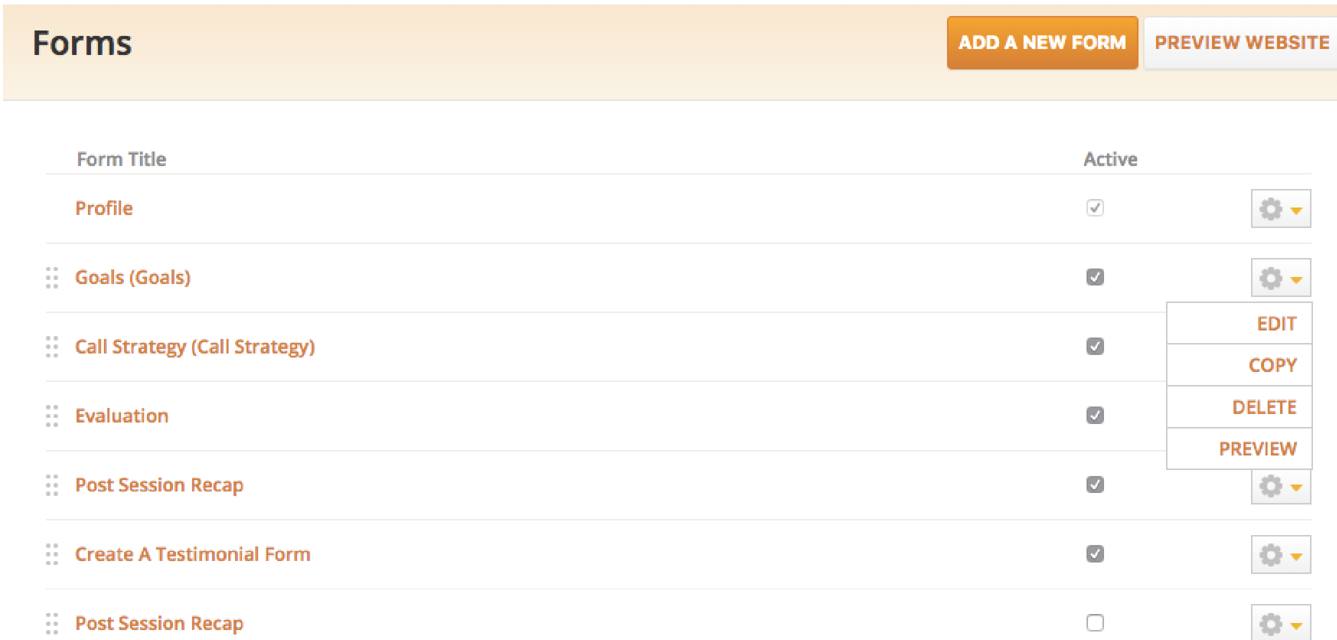
- ✓ Review any existing Pages pre-uploaded in your Console system.
- ✓ Customize existing Pages or add additional pages based on your business.
- ✓ Create Menus and connect them with Pages. **Click on WEBSITE → MENU.**

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.

STEP 3

Review Forms & Documents

Click on WEBSITE → FORMS



- ✓ 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, or graph. 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 files within your Console system.

For more information on how to redirect your external domain name to your Console website or point it to the Console IP (domain mapping), go to the Customer Support link in the the upper right corner of your Console Dashboard or open the Help pop-up window by clicking the question mark icon in your Console interface, and search for 'redirect' or 'domain mapping'.

For more information on how to integrate your Coaches Console private client website with your existing external website, search for 'integrate' in the Customer Support Center or the Help pop-up window (click on the question mark icon). For questions and support, go to the Support section of your Console Dashboard and click on the link "Open Ticket" to submit a Help Desk ticket.

For questions and support, you can submit Help Desk tickets in the **SUPPORT** section of your coach Dashboard.

JOIN US ON THE NEXT **LIVE SUPPORT CALL** held every **Tuesday, 2PM EST**

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 free report 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.

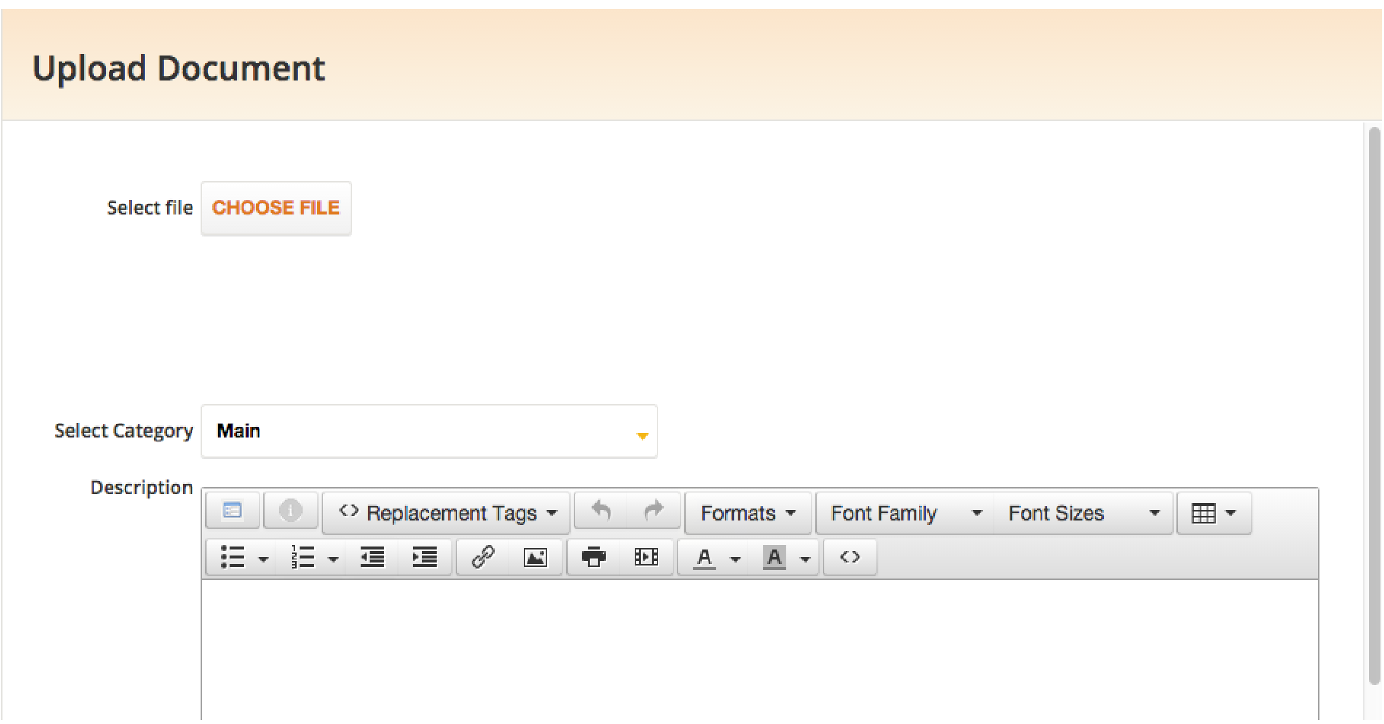
How to upload your Free Gift

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

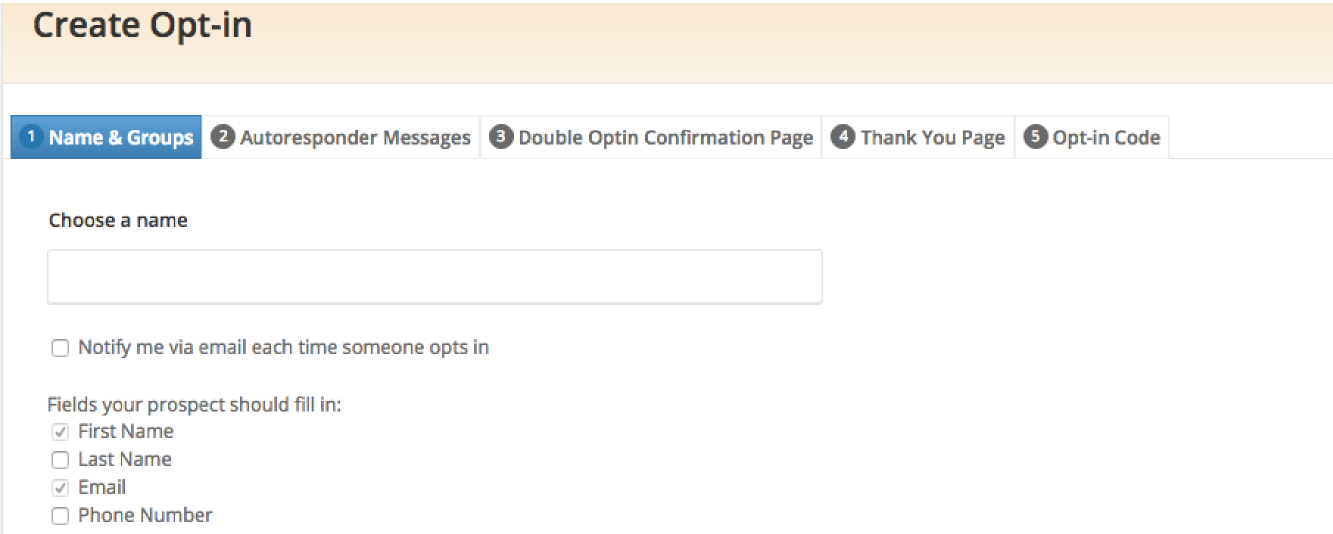


- ✓ Enter into the Description section the title of your document and a short description.
- ✓ Choose the permission settings for All Contacts, so that everyone has access to your free gift.

STEP 3

Create Your Opt-In Form & Autoresponders

Click on WEBSITE → CUSTOM OPT-IN FORMS → "CREATE OPT-IN" button.



- ✓ Create a name of 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 menu 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 online Console calendar. See DIY CRITICAL KEY #4 for more details on how to do this.

- ✓ For more information on how to **apply your Custom Opt-In Form to an existing website**, search for 'Custom Opt-In Form' in the **Support Center** or in the Help pop-up window.

For questions and support, you can submit Help Desk tickets in the **SUPPORT** section of your coach Dashboard.

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Critical Key #4

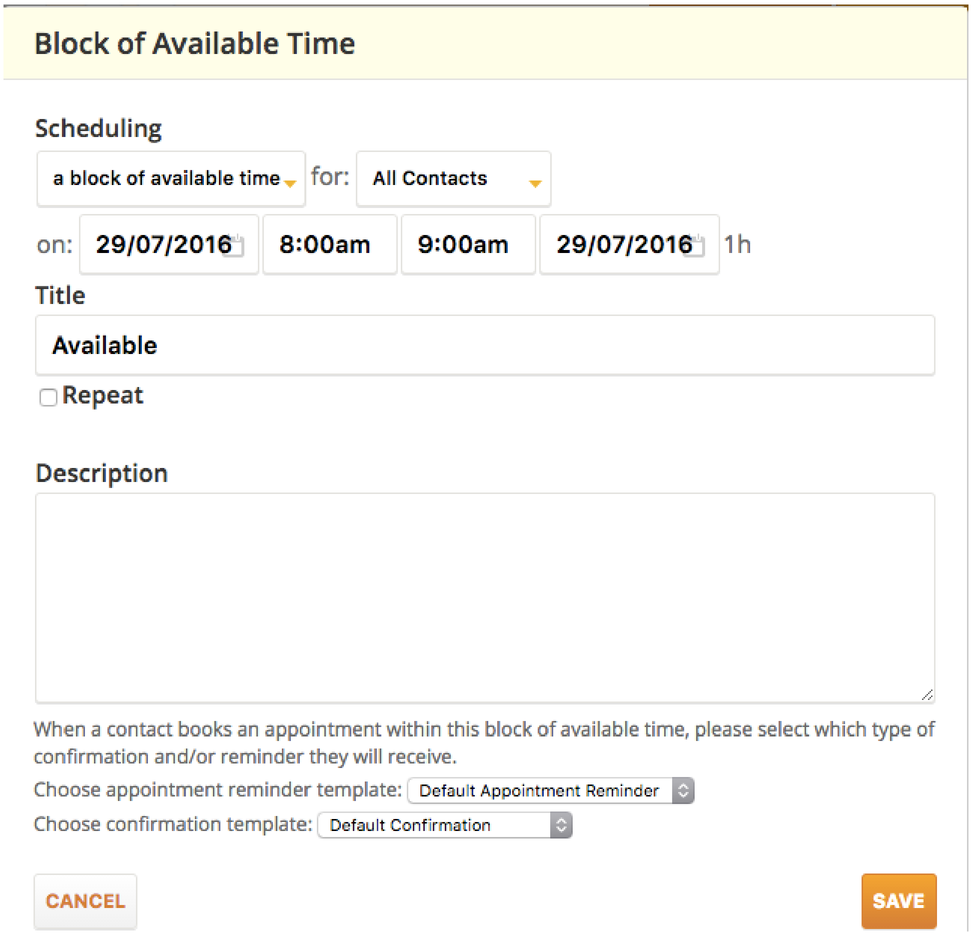
Prospects Booking Sample Sessions On Your Website

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.



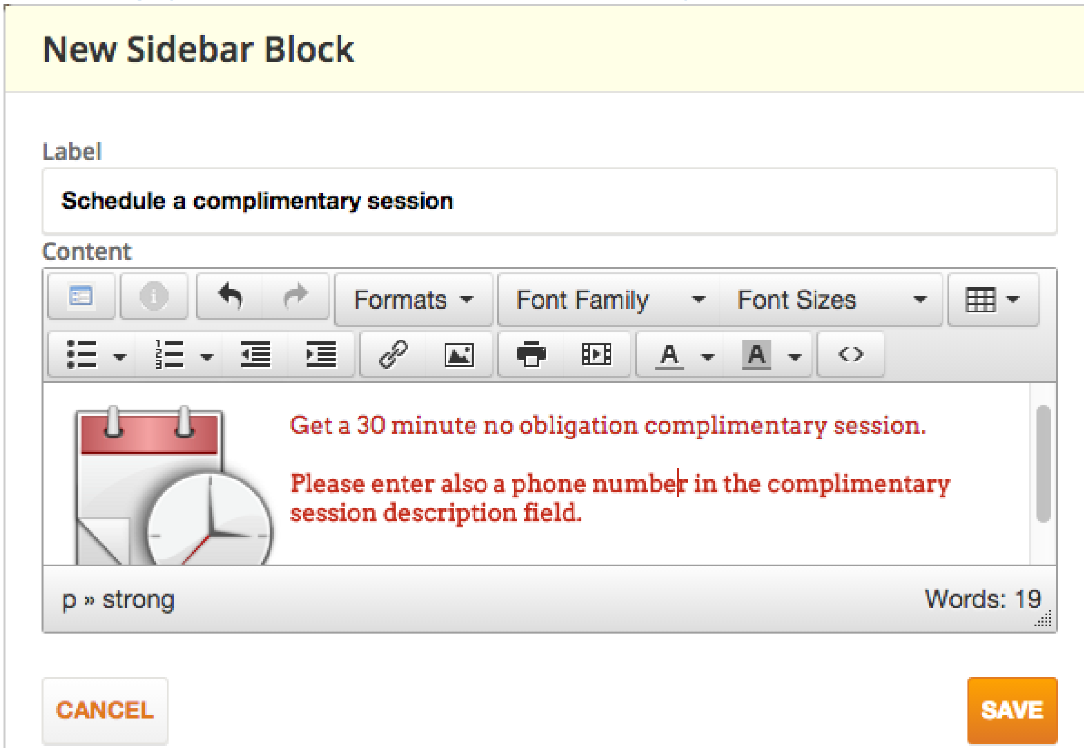
Prepare your calendar in advance by adding blocks of available time to your calendar for prospects and clients to choose from. Click on **CALENDAR → AVAILABLE TIME Button.**

- ✓ Categorize the type of available time.
- ✓ Select the date, start time and stop time.
- ✓ You can either schedule a single appointment or click on "Repeat" for a recurring series.
- ✓ Select a template for the appointment reminder and confirmation.

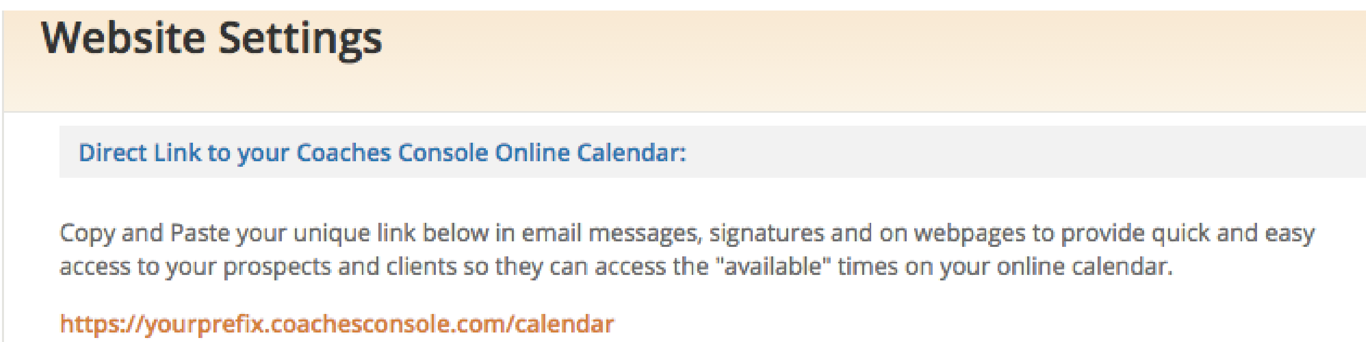
Security and Confidentiality is of utmost importance. Your prospects or clients cannot see the names and scheduling of other clients on your calendar. They can only see open blocks of available time and any appointments they have scheduled with you.

STEP

2 Adding your Online Calendar to your Website



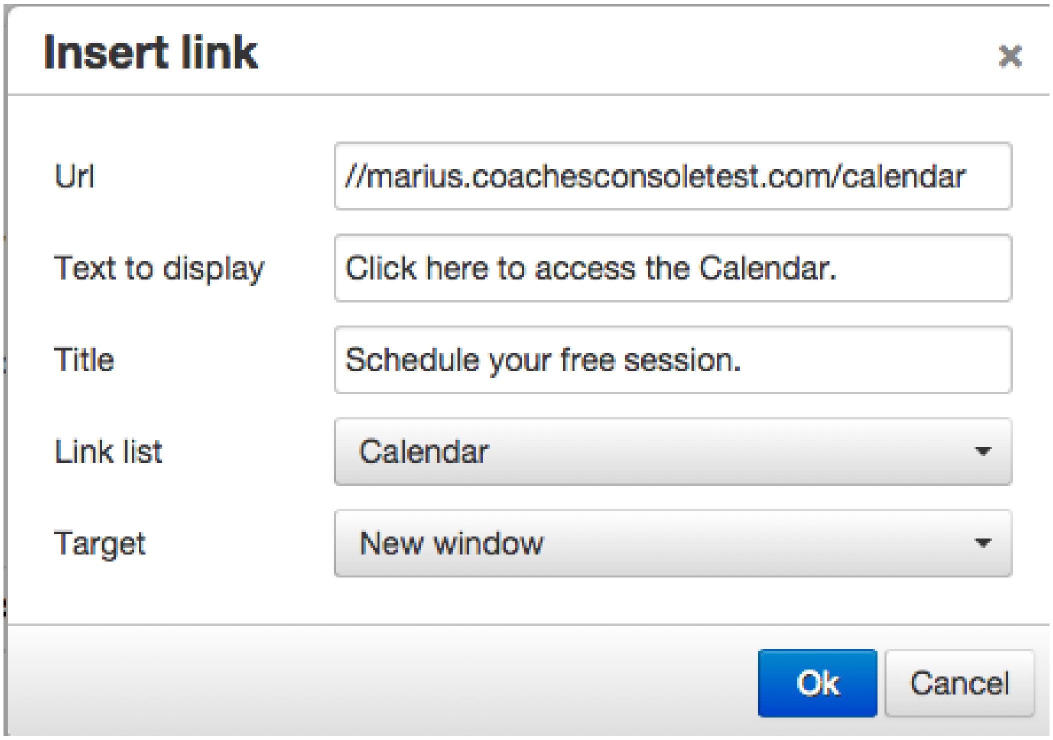
If you're using your Coaches Console website as your primary website, this is Done 4 You! It's a default Sidebar Box already configured. To edit the text that displays on the side of your website along with the scheduling button, click on **WEBSITE → Sidebar Boxes** and then on the EDIT button in the drop-down menu to the right of the **Schedule a Complimentary Session Box.**



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

STEP

3 Adding a direct link to your calendar in autoresponders and emails



- ✓ 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 content editor.
- ✓ Paste in your Calendar URL (select it from the Link List > Calendar).
- ✓ Click ‘OK’.

For questions and support, you can submit Help Desk tickets in the **SUPPORT** section of your coach Dashboard.

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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 website.*

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 website.*

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. Only those hours/appointments scheduled with Active, Inactive and Hot Lead status types will be included in your certification report. Any appointments scheduled with "Prospects" will NOT be tracked in your Certification Report. Convert them to "Hot Leads" first!

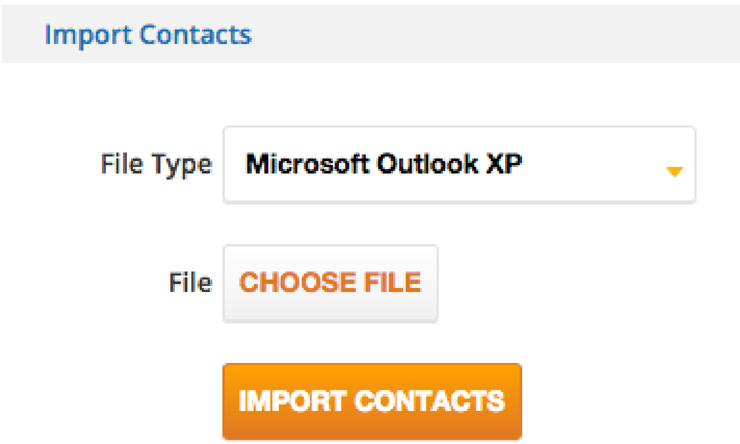
- ✓ **Create Groups.** In addition to status types, you can segment your contacts into group(s) created in **CONTACTS TAB → MANAGE GROUPS (link to the right) → ADD GROUP.**
- ✓ **Add Contacts.** Manually add contacts to your Console system using the **+ icon (lower left side) → ADD CONTACT** or in **CONTACTS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



- ✓ 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 promptings 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 **at least a first name 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.*

For questions and support, you can submit Help Desk tickets in the **SUPPORT** section of your coach Dashboard.

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Critical Key #6

Newsletters, Autoresponders & Emails

Why this is critical:

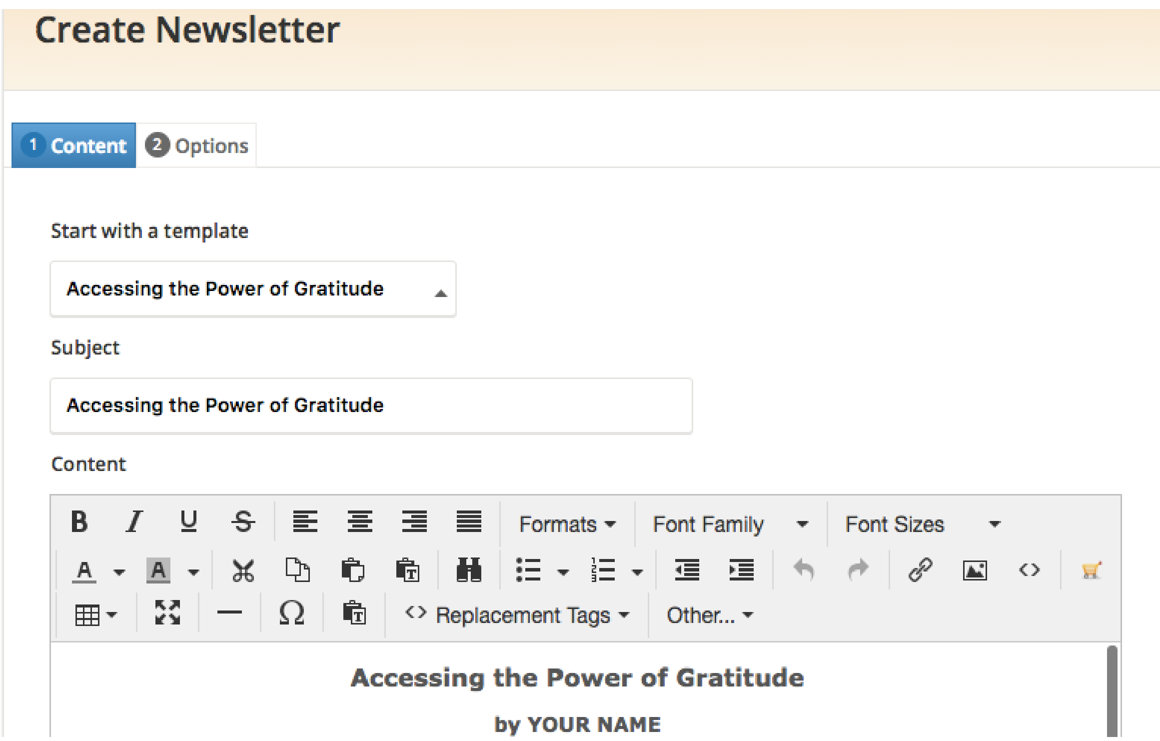
Within your Coaches Console system you have the ability to:

- ✓ Build your database through delivering a free gift and automating your marketing follow up using the Autoresponder associated with an Opt-In form.
- ✓ Keep in touch with prospects via a Newsletter.
- ✓ Send email broadcasts and promo campaigns.
- ✓ Engage clients using the New Client Autoresponder.

STEP 1

How To Set Up Your Newsletter

Go to COMMUNICATE → NEWSLETTERS → CREATE NEWSLETER.



Create your Newsletter Template and include the 5 most effective newsletter elements upon the initial access of this feature.

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.

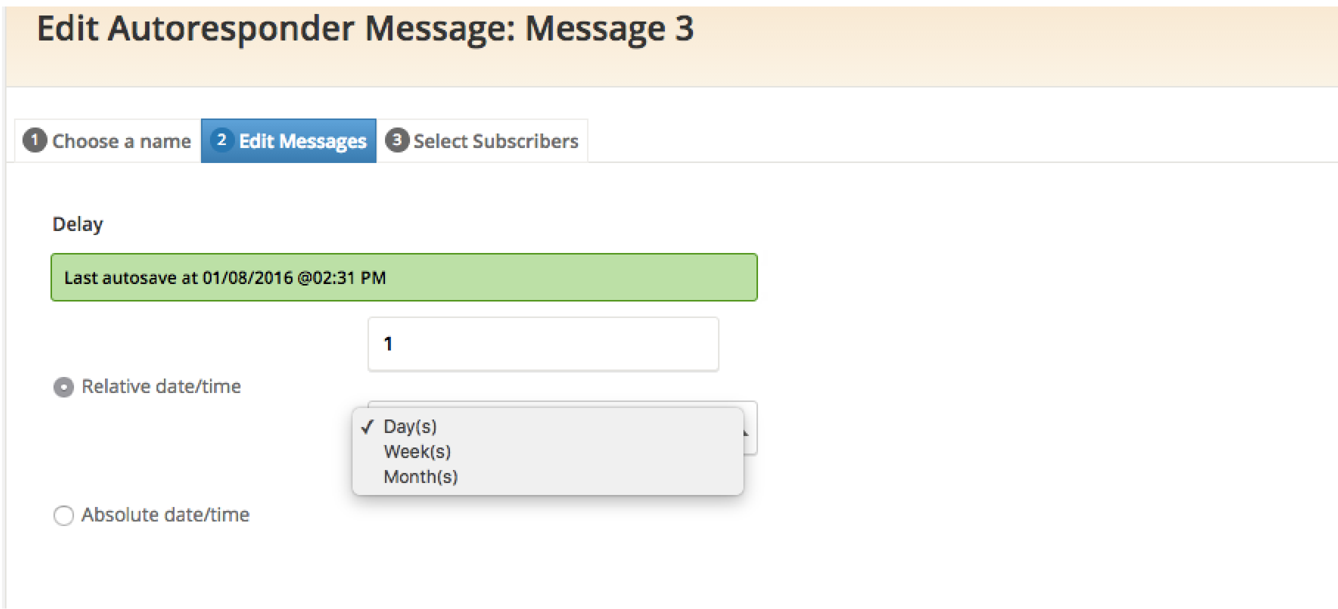
You can edit your newsletter templates in COMMUNICATE → NEWSLETTERS → EDIT TEMPLATES (button to the right side).

For more information search ‘newsletters’ in the **Customer Support Center** or in the Help pop-up (click on the question mark icon in your Console interface).

STEP 2

How To Set Up Custom Autoresponders

Click on COMMUNICATE → AUTORESPONDERS



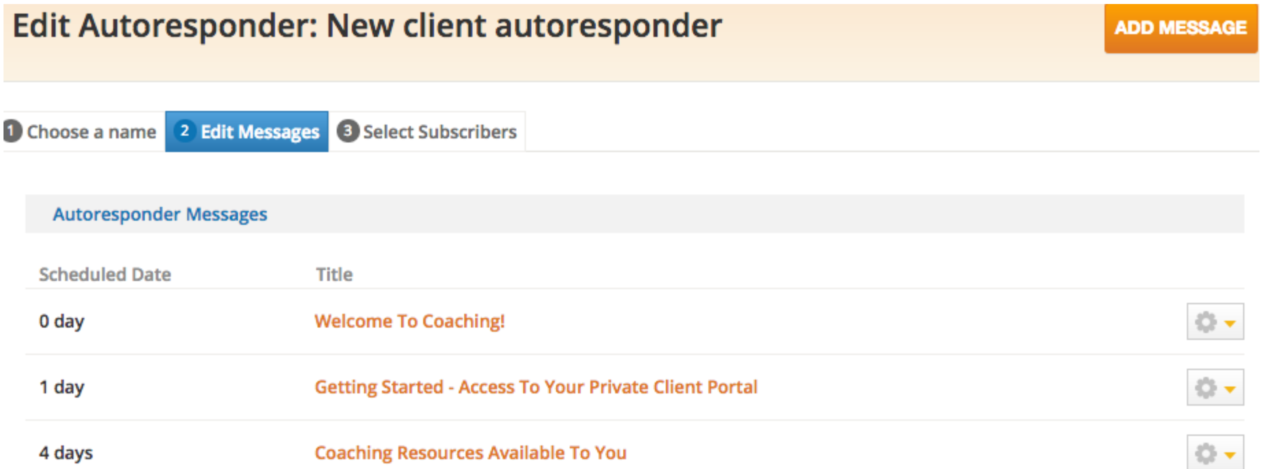
- ✓ Name your autoresponder series.
- ✓ Add the messages to your series and set your timing sequence either by relative interval (# of days, weeks, months delayed from contact opt-in date) OR by specific date and time.
- ✓ Select the subscribers in one go by checking the box in front of their names and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

For more information search ‘custom autoresponders’ in the **Customer Support Center** or in the Help pop-up (click on the question mark icon in your Console interface).

STEP
3

How To Set Up New Client Autoresponder

Click on COMMUNICATE ➔ AUTORESPONDERS ➔ NEW CLIENT AUTORESPONDER



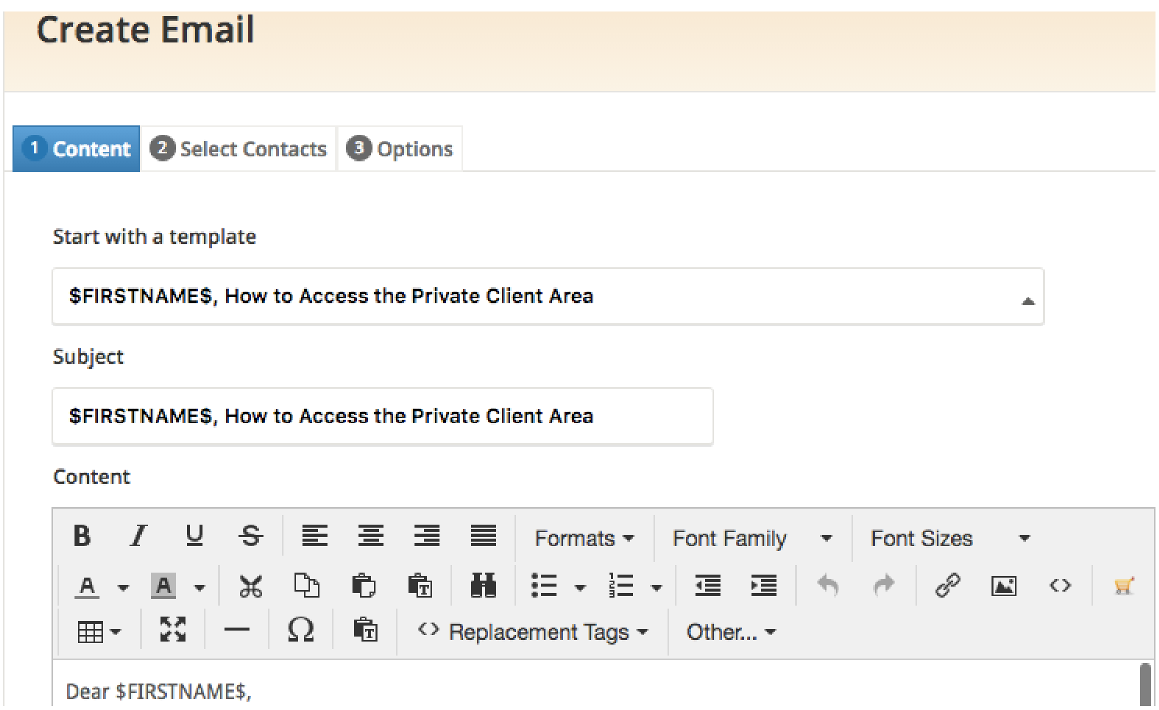
This series is automatically triggered when a new client electronically clicks on the ‘I Accept’ button to electronically agree to your coaching agreement (provided that you checked this option in the agreement settings). The series can also be manually assigned by you to a new client.

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.

STEP
4

How To Set Up Email Templates & Campaigns

Click on COMMUNICATE ➔ EMAILS



- ✓ 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.

For more information search 'custom autoresponders' in the **Customer Support Center** or in the Help pop-up (click on the question mark icon in your Console interface).

For questions and support, you can submit Help Desk tickets in the **SUPPORT** section of your coach Dashboard.

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Critical Key #7

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

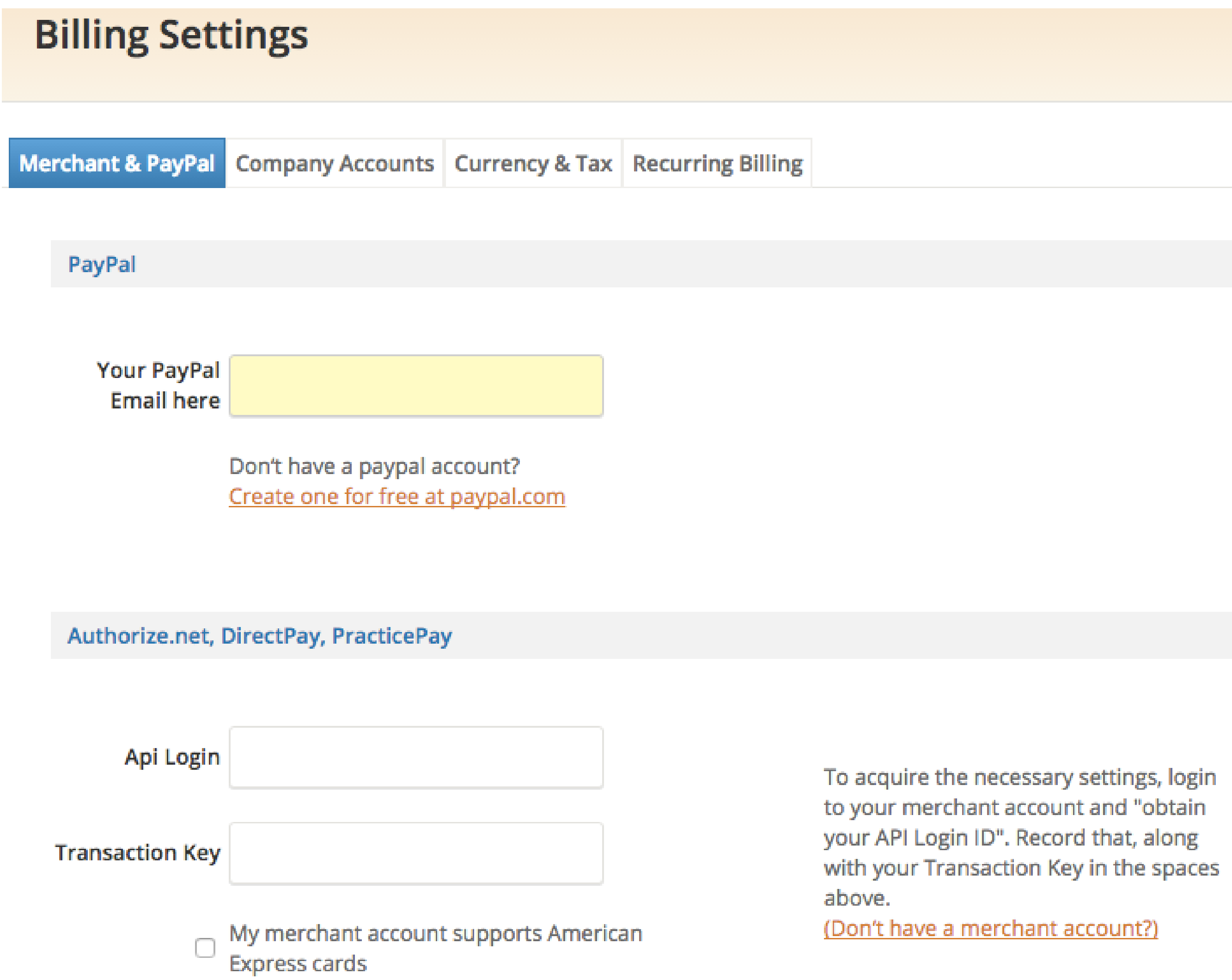
Why this is critical:

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 DASHBOARD → MY ACCOUNT → BILLING SETTINGS

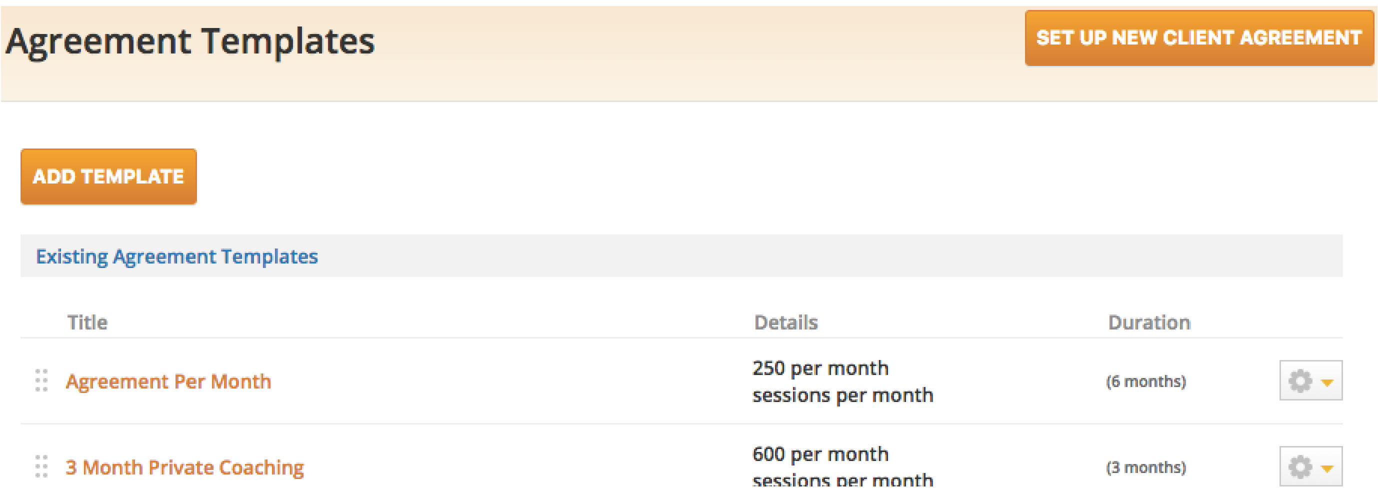


- ✓ **Merchant & PayPal.** If you wish to process payments either through your private PAYMENTS page or through your online storefront using your Console Shopping Cart, you will need a merchant or a PayPal account. If you already have a merchant account, it can be integrated into your Console system ***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



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.

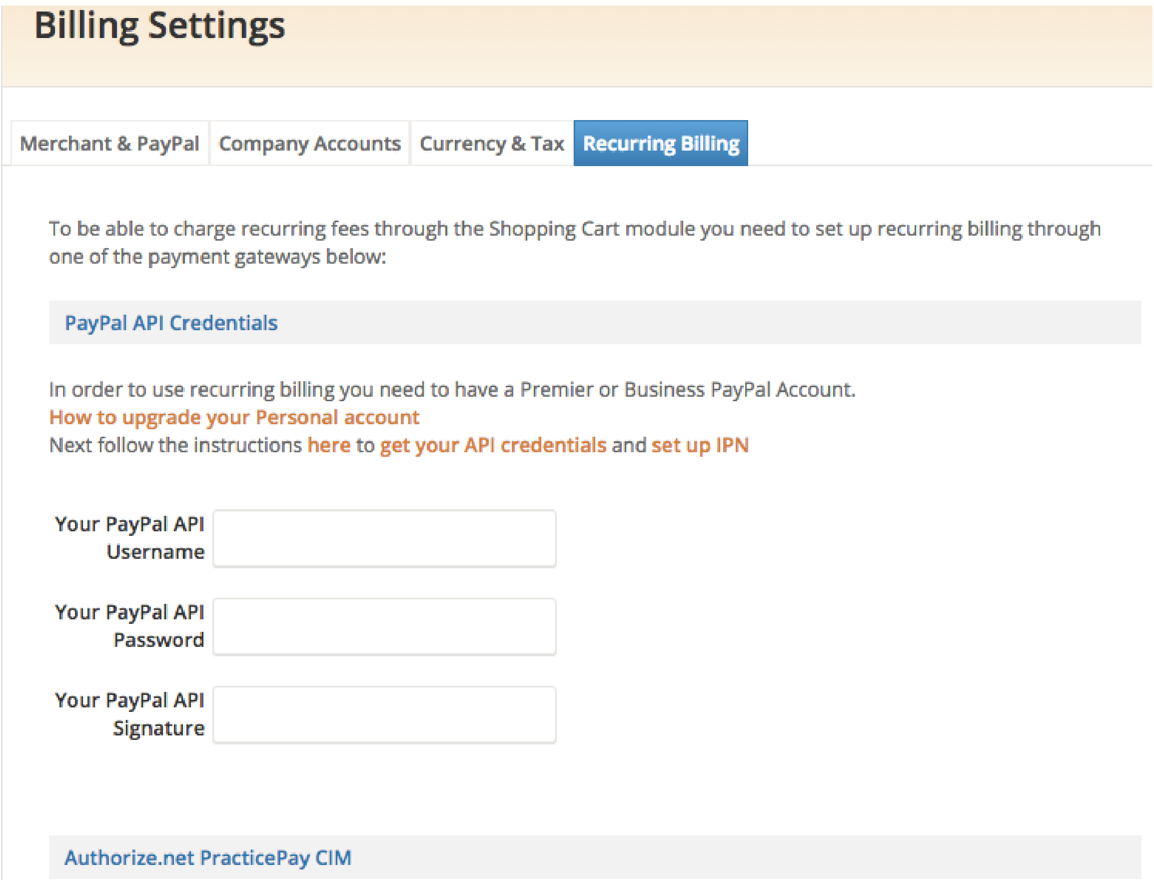
- ✓ **E-mail:** Create the email proposal message that will deliver the Agreement Link to your new or existing clients for them to click on, review the terms, and sign online.
- ✓ **Thank You:** Customize a 'Thank You' page that is displayed right after the client accepts the terms of your agreement.
- ✓ **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** (PayPal or Authorize.net), so that you can securely receive credit card payments online.



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 Auhorize.net and Premier or Business PayPal account.)

- ✓ Connect the merchant account to your Coaches Console system. Click on **DASHBOARD → MY ACCOUNT → BILLING SETTINGS** and under the "Merchant & PayPal" tab you can enter the required merchant account data (double check the data you provide). Clicking 'Save' will automatically integrate your Console System with your merchant account.

- ✓ Within your Coaches Console system, click on **DASHBOARD → MY ACCOUNT → 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 merchant 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!!!

For questions and support, you can submit Help Desk tickets in the **SUPPORT** section of your coach Dashboard.

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Critical Key #8

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

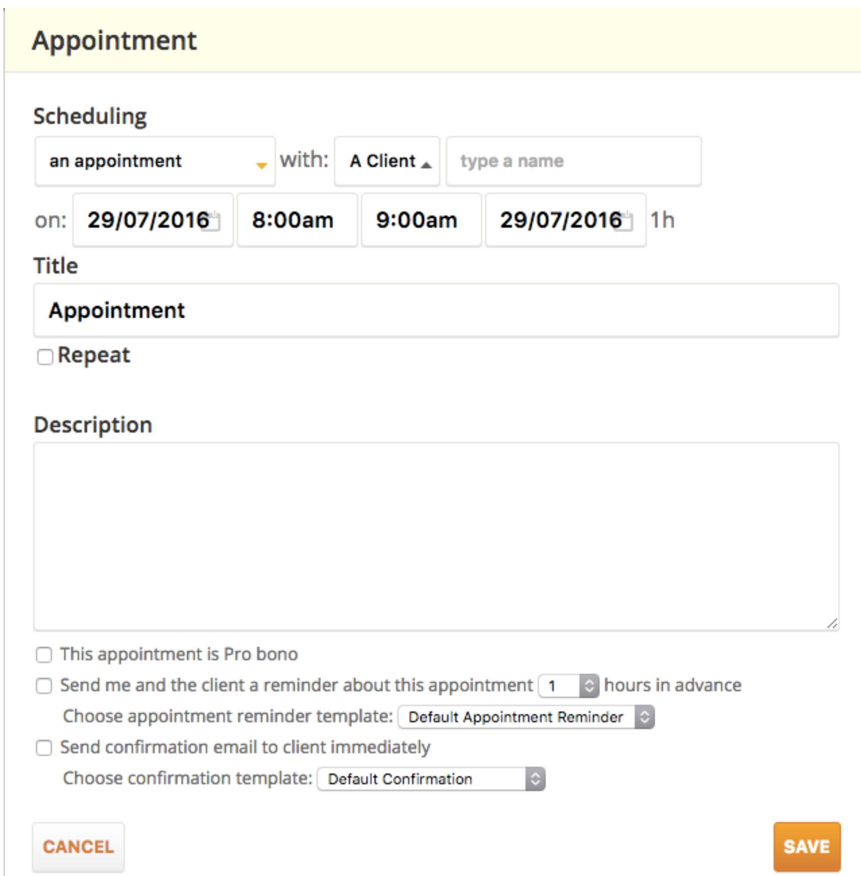
Why this is critical:

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 (or the CALENDAR TAB) and use the button NEW APPOINTMENT.



- ✓ Create an appointment title.
- ✓ 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).

✓ Select your options:

1. Pro-bono
2. Sending of automated appointment reminder (select from your templates list)
3. Sending of immediate appointment confirmation (select from your templates list)

*Automated appointment reminders are sent from your Console prior to every appointment (when the option is selected) at a time interval chosen by you in **MY ACCOUNT ➔ Calendar Settings**. To customize the automated appointment reminder message content, click on **DASHBOARD ➔ MY ACCOUNT (upper right) ➔ NOTIFICATION TEMPLATES.** This is where you can also create additional templates for the appointment reminders and confirmations.*

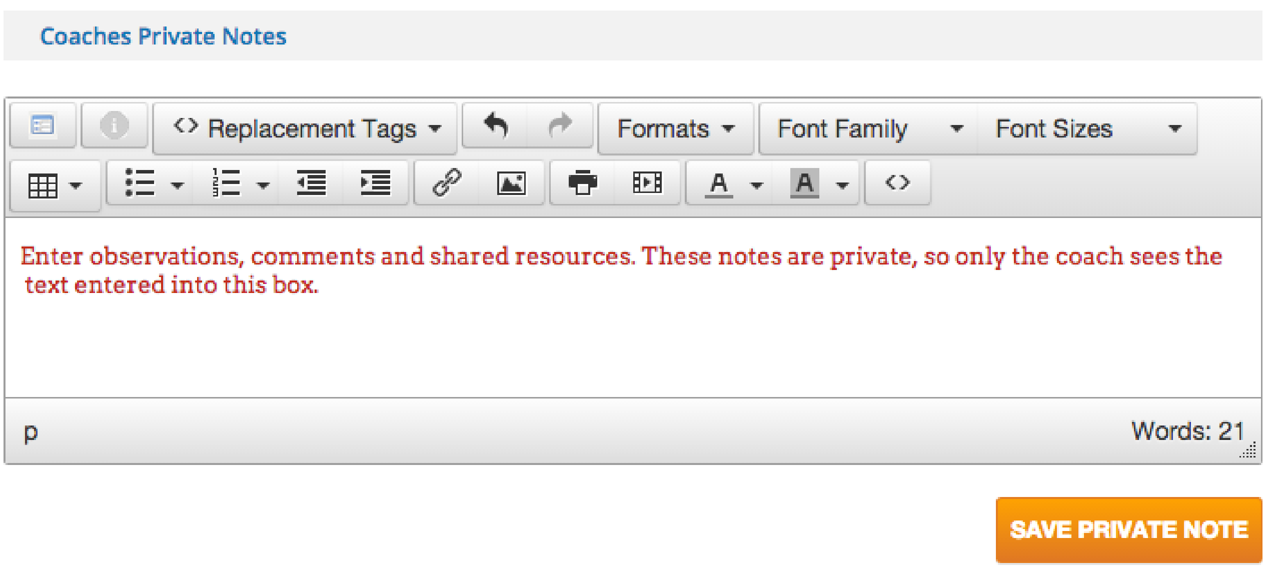
By default, a link to the 'Call Strategy' Form is included in the body of the appointment reminder message. When the clients click on this hyperlink, they will be prompted to log into your private client website and will automatically be redirected to the Call Strategy Form there.

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 4 You!!! Go to REPORTS ➔ CERTIFICATION REPORT to generate the report.

STEP 2

Taking Session Notes & Providing Follow-up Accountability

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".

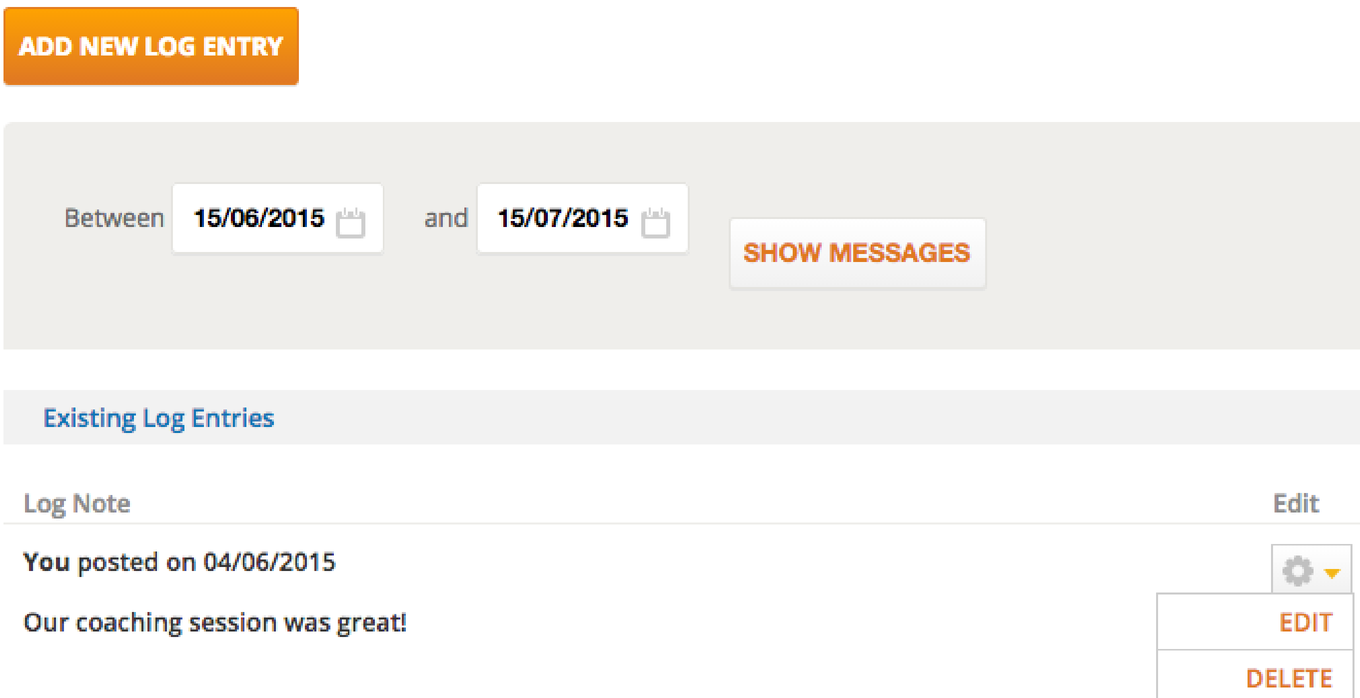
✓ Scroll down on this same webpage and enter any follow-up notes in the box 'Appointment Notes to E-mail to {client's name}:'. Only the notes in this section will be emailed to your client, if you choose the option to email them.

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 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.

For questions and support, you can submit Help Desk tickets in the **SUPPORT** section of your coach Dashboard.

JOIN US ON THE NEXT **LIVE SUPPORT CALL** held every **Tuesday, 2PM EST**

Critical Key #9

How to Bill Your Clients Using Invoices

Why this is critical:

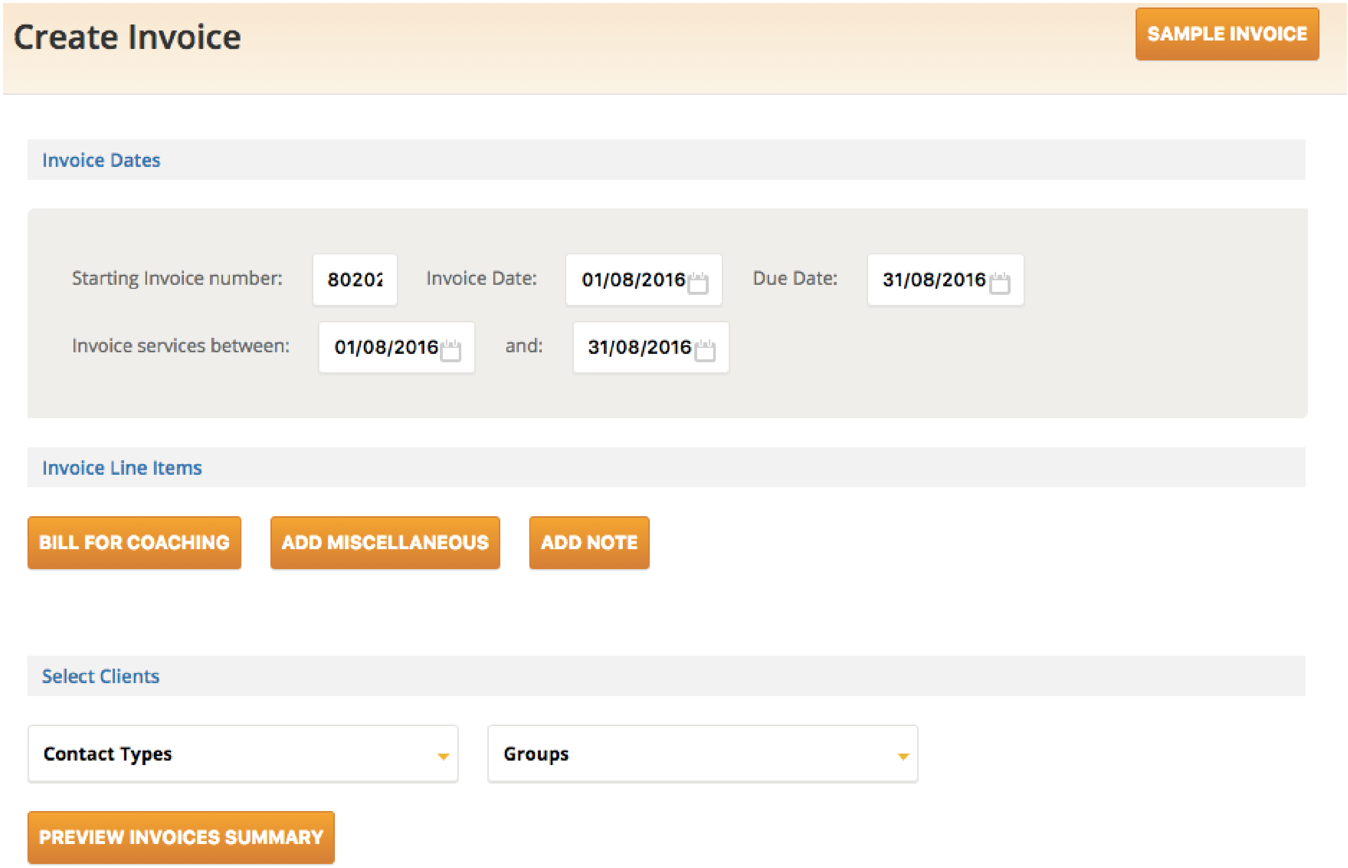
Part of being a savvy business owner is setting up professional ways to invoice your clients, process payments, issue receipts, and track your finances. We know most folks would rather spit nails, but without this element in your business you'll never thrive at doing what you love!

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.



✓ 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

Invoices History

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

From: 15/07/2014 To: 15/07/2015 SHOW INVOICES

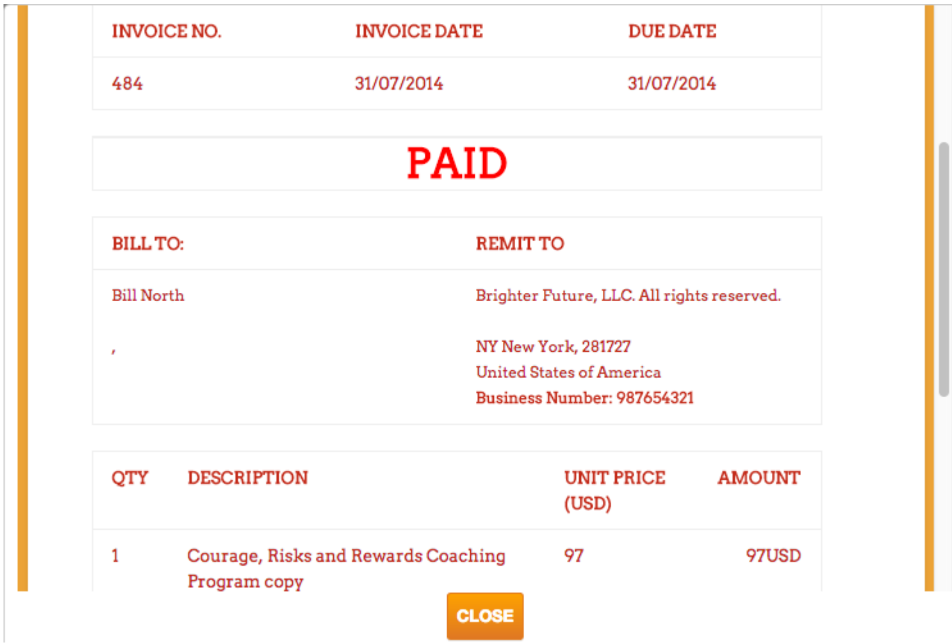
Invoice Date	Due Date	Inv. #	Description	Amount	Paid	Balance	Options
31/07/2014	31/07/2014	484	Courage, Risks and Rewards Coaching Program copy	97 USD	97 USD	0 USD	
01/08/2014	31/08/2014	493	**Coaching:** **Per month:** 75 USD A...	75 USD	75 USD	0 USD	
01/08/2014	31/08/2014	510	Time for Action	900 USD	0 USD	900 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.

STEP 3

Send A Receipt

Click on CONTACTS → CONTACT NAME → INVOICES



INVOICE NO.	INVOICE DATE	DUE DATE
484	31/07/2014	31/07/2014

PAID

BILL TO:	REMIT TO
Bill North ,	Brighter Future, LLC. All rights reserved. NY New York, 281727 United States of America Business Number: 987654321

QTY	DESCRIPTION	UNIT PRICE (USD)	AMOUNT
1	Courage, Risks and Rewards Coaching Program copy	97	97USD

CLOSE

- ✓ 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

STEP 4

- ✓ 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.

For questions and support, you can submit Help Desk tickets in the **SUPPORT** section of your coach Dashboard.

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Critical Key #10

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

Why this is critical:

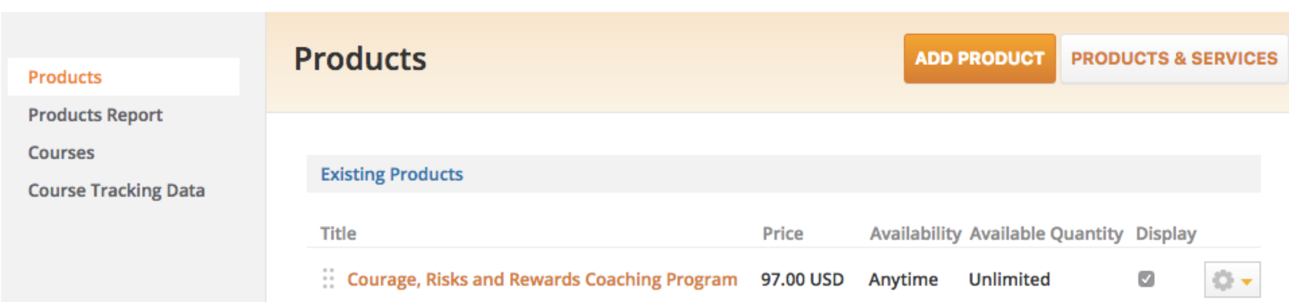
One of the keys to a successful coaching practice is offering a variety of effective products and programs online, to suit the needs of a variety of clients. From your free classes or calls to your high ticket coaching programs, you can integrate it all into a cohesive lineup that flows naturally from 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.



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.

STEP 2

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.*

STEP 3

'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.

For questions and support, you can submit Help Desk tickets in the **SUPPORT** section of your coach Dashboard.

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Critical Key #11

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

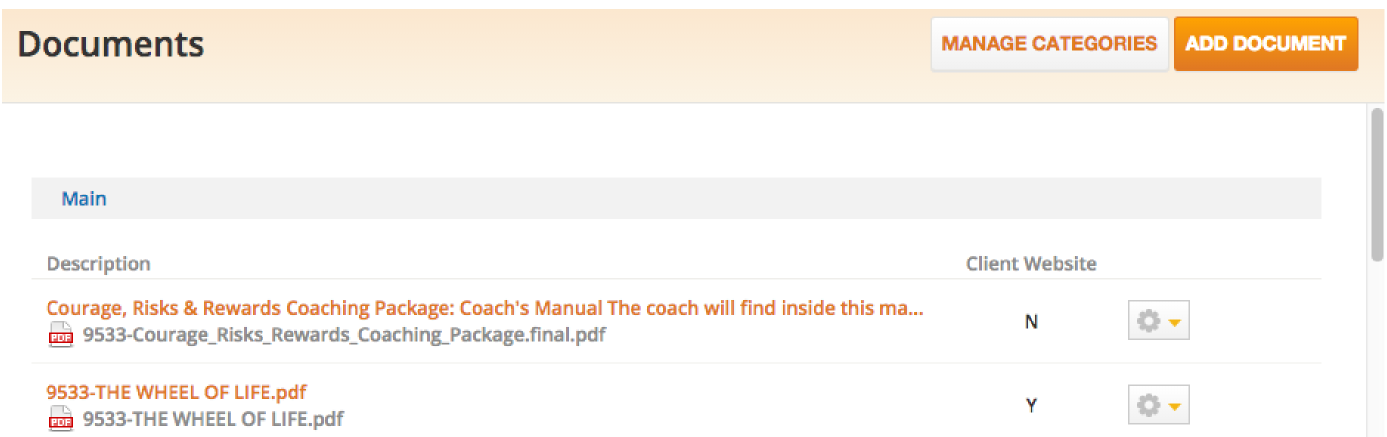
Why this is critical:

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



In this manual:

✓ Review the 8 Strategies to Grow Your List using this program.

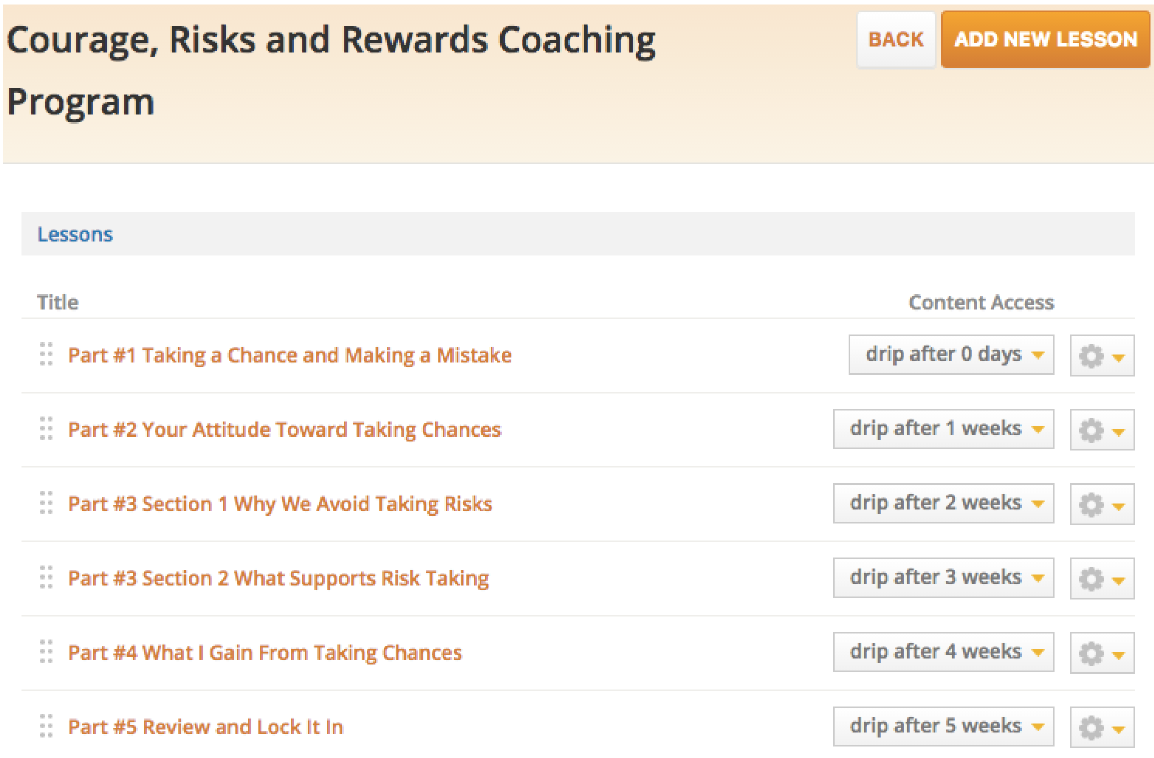
✓ Review the 5 Ways To Make Money (immediately) using this program.

✓ Rehearse the script that's included to deliver this as a free marketing teleclass.

STEP 2

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)



✓ 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:

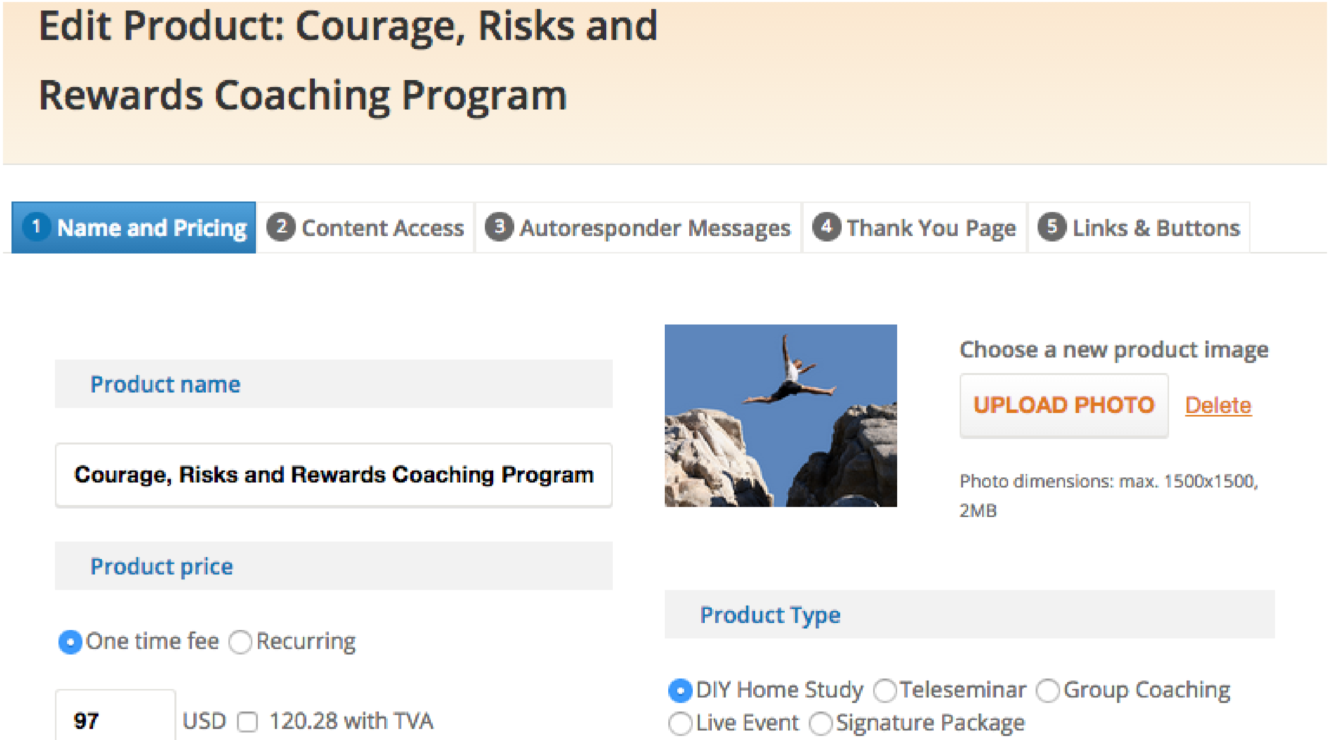
1. Text
2. Videos
3. Interactive Forms
4. Documents
5. Discussion Box

✓ 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.

STEP 3

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).



- ✓ 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.

For questions and support, you can submit Help Desk tickets in the **SUPPORT** section of your coach Dashboard.

JOIN US ON THE NEXT **LIVE SUPPORT CALL** held every **Tuesday, 2PM EST**

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 Weekly Training Webinars: Tues @ 2

You are invited to join in a live members-only call with co-founders Melinda and/or Kate every Tuesday at 2:00pm EST as they walk you through utilizing the features within your Console System.

In these live calls you will:

✓ Receive **step-by-step guidance** on how to use the various features of your Coaches Console System.

✓ Learn tips and tricks on making the most of your Coaches Console System.

✓ **Discuss challenges** in using your Coaches Console and how to work through them.

✓ Discover how using the various features of your Coaches Console system **impacts your bottom line** success on coaching more clients and earning more money.

✓ Have access to a **live Q&A session with Melinda and/or Kate** to ask specific questions about your system.

The current topics are listed in the Tues@2 section of your coach dashboard, where you can register. Or **click here** to view the upcoming topics, as well as all archived training calls.

SUCCESS RESOURCE #2 – Business Success Calls

Attend these free calls with industry experts as we connect you with other tools to support you in coaching more clients, earning more money and being successful. In these calls you will:

✓ Have access to industry leaders supporting you in creating a thriving business (experts such as Michael Port, Lisa Cherney, Kim Clausen, Callan Rush, and more);

✓ Learn the latest, **most effective approaches to sales and marketing;**

✓ Connect with like-minded coaches and business owners.

SUCCESS RESOURCE #3 - VA Support Services

We'd like to introduce you to Virtual Assistants who have been certified in the setup and integration of The Coaches Console system to support you in the ease and use of the system. **Meet the VA's**!

SUCCESS RESOURCE #4 - Business Success Hub

A blog site and other social media tools have been set up for you to:

- ✓ Access various tools, resources and information about the details of running a business, marketing, sales and other aspects of building thriving business.
- ✓ Connect with other successful coaches.
- ✓ Post your own information, insights and resources.

Click here to access the blog site where you will receive articles, case studies and access to additional wisdom from industry leaders and other successful coaches.

SUCCESS RESOURCE #5 - Console Insider

The Coaches Console monthly newsletter filled with:

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

SUCCESS RESOURCE #6 - 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 **Mastermind Facebook Group**, that you can also count as another business success resource.

With Pleasure,

Melinda + Kate