



**COACHLEADS**

## Appointment Software

Setting Your Schedule  
Customizing Your Schedule  
Integrating PayPal Payments  
Connecting to Google Calendar

Your CoachLeads

# APPOINTMENT

software will allow you to  
take appointments and process  
payments directly from your website



# Appointments and Payments

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Your Appointment Software and PayPal payment integration

## Appointment Software

Your CoachLeads Appointment software is custom software that is built into your website. This will allow you to do things such as:

set your schedule, availability, manage appointments, manage your services, customize the look of your booking calendar for clients, edit email templates, integrate SMS text message reminders for your clients, add discount coupons, and more!

This all comes with your CoachLeads subscription!

## PayPal Integration

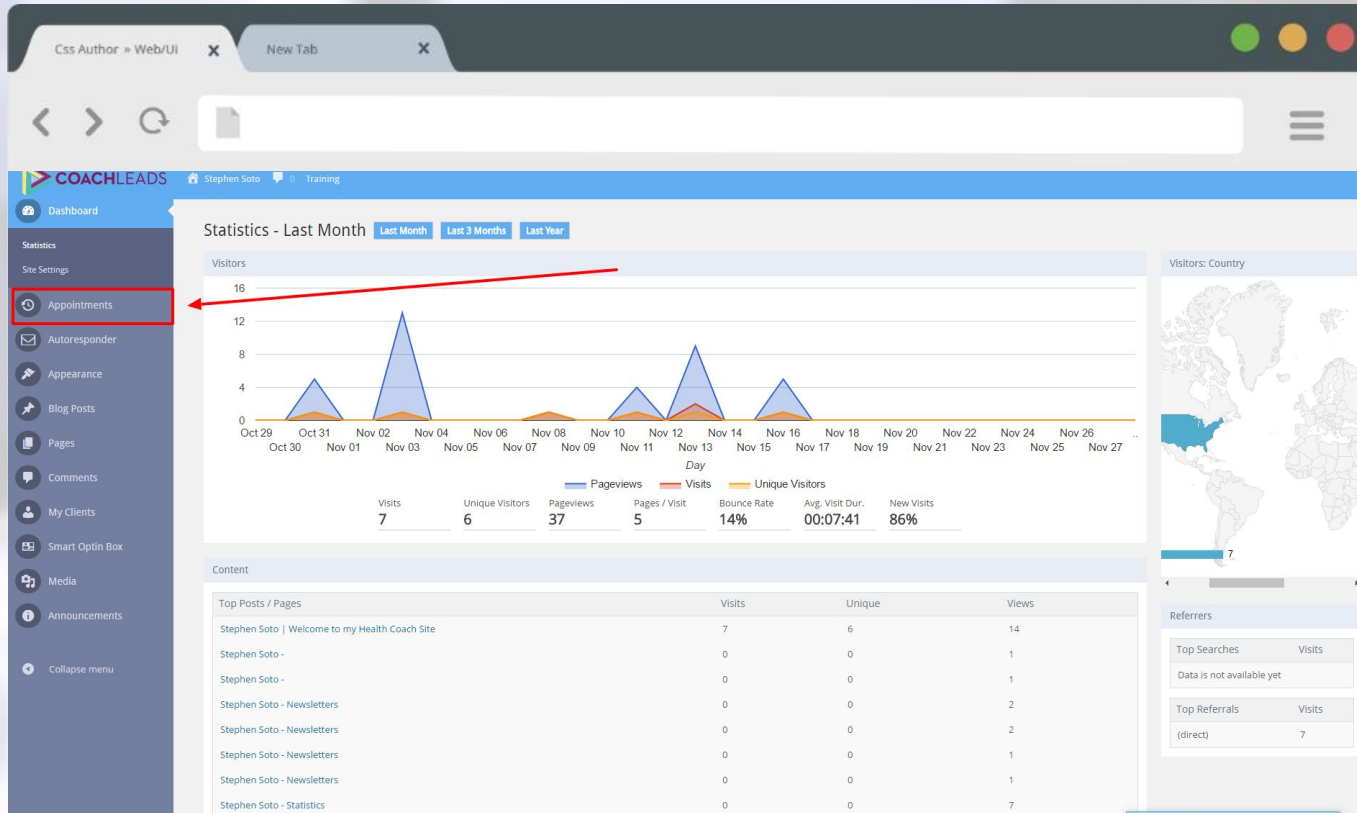
You are also able to integrate PayPal payments into your CoachLeads website.

This will allow clients to not only book appointments directly on your website, but it will also redirect them to PayPal to process payments!

This means that after integrating PayPal, your clients will be able to pay you directly through your website!

# Accessing Your Appointments

Once you are logged into your website, go to your Dashboard  
In your Dashboard, click the button in the menu that says "Appointments"  
Clicking this button will take you to your Appointment Software



# Your Calendar (Month-In-Review)

The homepage for your appointment software is your Monthly Calendar  
This will show all of your past, current, and upcoming appointments  
You can click on appointments for more information

The screenshot displays the COACHLEADS web application interface. The browser window shows two tabs: 'Css Author » Web/UI' and 'New Tab'. The application has a blue header with the 'COACHLEADS' logo and user information 'Stephen Soto' and 'Training'. A sidebar on the left contains navigation links: Dashboard, Appointments (selected), Autoresponder, Appearance, Blog Posts, Pages, Comments, My Clients, Smart Optin Box, Media, Announcements, and Collapse menu. The main content area features a top navigation bar with links for Appointments, Services, Providers, Settings, Payments, Clients, and Export. Below this, there are buttons for 'Book Appointment', 'Past Appointments', and a 'Filter By Service Provider' dropdown menu set to '---All Provider---'. The calendar itself is for November 2016, with a 'Today' button and view toggles for 'Month', 'Week', and 'Day'. The calendar grid shows dates from 30 to 26, with columns for Sun, Mon, Tue, Wed, Thu, Fri, and Sat. The date 25 is highlighted with a blue bar at the bottom.

Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26

APPOINTMENT SOFTWARE

# SERVICES

your services will allow you to add,  
edit, and delete any of the programs  
you offer to your clients



# Accessing Your Services

To access your Services, click the “Services” tab at the top of your screen  
This will take you to your Services page

The screenshot displays the COACHLEADS web application interface. The browser window shows two tabs: 'Css Author » Web/UI' and 'New Tab'. The address bar is empty. The application header includes the COACHLEADS logo, user information (Stephen Soto), and a 'Training' link. A navigation bar contains several tabs: 'Appointments', 'Services' (highlighted with a red box), 'Providers', 'Settings', 'Payments', 'Clients', and 'Export'. Below this bar, there are buttons for 'Book Appointment', 'Past Appointments', and a 'Filter By Service Provider' dropdown menu. The main content area shows a calendar for November 2016, with days of the week (Sun to Sat) and dates (1 to 26) visible. A red arrow points from the 'Services' tab in the navigation bar to the 'Past Appointments' button.

Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26

# Your Services

This is your "Services" page... all of your services are listed here  
You can add, delete, and edit your services on this page  
You can also select what days of the week each services are offered

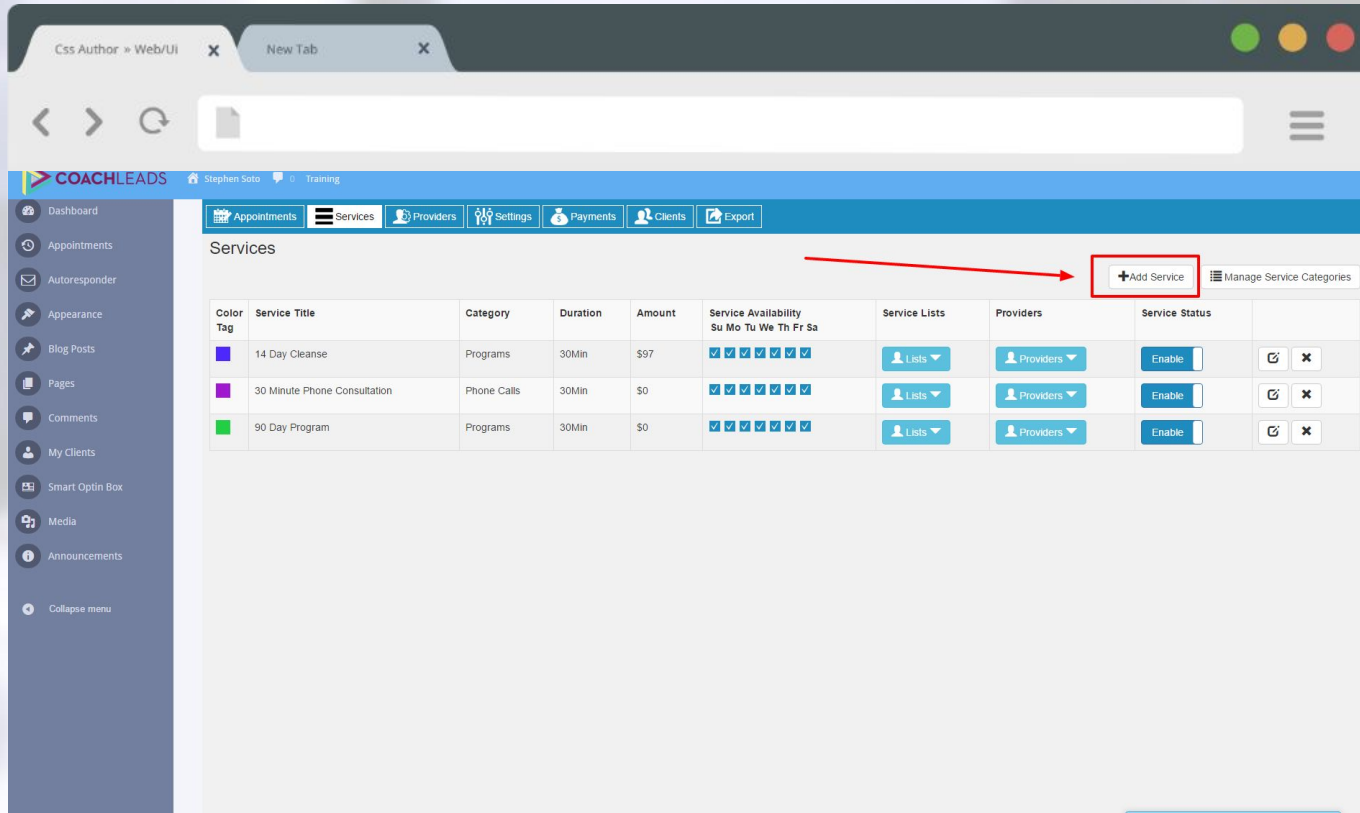
The screenshot shows the COACHLEADS web application. The top navigation bar includes links for Appointments, Services, Providers, Settings, Payments, Clients, and Export. The left sidebar contains a list of navigation items: Dashboard, Appointments, Autoresponder, Appearance, Blog Posts, Pages, Comments, My Clients, Smart Optin Box, Media, Announcements, and Collapse menu. The main content area is titled 'Services' and features a table with the following data:

Color Tag	Service Title	Category	Duration	Amount	Service Availability Su Mo Tu We Th Fr Sa	Service Lists	Providers	Service Status	
Blue	14 Day Cleanse	Programs	30Min	\$0	✓ ✓ ✓ ✓ ✓ ✓ ✓	<a href="#">Lists</a>	<a href="#">Providers</a>	<a href="#">Enable</a>	<a href="#">Edit</a> <a href="#">Delete</a>
Purple	30 Minute Phone Consultation	Phone Calls	30Min	\$0	✓ ✓ ✓ ✓ ✓ ✓ ✓	<a href="#">Lists</a>	<a href="#">Providers</a>	<a href="#">Enable</a>	<a href="#">Edit</a> <a href="#">Delete</a>
Green	90 Day Program	Programs	30Min	\$0	✓ ✓ ✓ ✓ ✓ ✓ ✓	<a href="#">Lists</a>	<a href="#">Providers</a>	<a href="#">Enable</a>	<a href="#">Edit</a> <a href="#">Delete</a>



# Adding a Service

To add a service, click the “Add Service” button in the top right corner  
This will take you to a page to fill in information about your new service









The screenshot shows the COACHLEADS web application interface. The top navigation bar includes links for Appointments, Services, Providers, Settings, Payments, Clients, and Export. The left sidebar contains a menu with options like Dashboard, Appointments, Autoresponder, Appearance, Blog Posts, Pages, Comments, My Clients, Smart Optin Box, Media, Announcements, and Collapse menu. The main content area is titled 'Services' and features a table with columns for Color Tag, Service Title, Category, Duration, Amount, Service Availability (Su Mo Tu We Th Fr Sa), Service Lists, Providers, and Service Status. A red arrow points to the '+Add Service' button located in the top right corner of the table area, next to the 'Manage Service Categories' link.

Color Tag	Service Title	Category	Duration	Amount	Service Availability Su Mo Tu We Th Fr Sa	Service Lists	Providers	Service Status	
14 Day Cleanse	14 Day Cleanse	Programs	30Min	\$97	✓ ✓ ✓ ✓ ✓ ✓ ✓	<a href="#">Lists</a>	<a href="#">Providers</a>	<a href="#">Enable</a>	<a href="#">✕</a>
30 Minute Phone Consultation	30 Minute Phone Consultation	Phone Calls	30Min	\$0	✓ ✓ ✓ ✓ ✓ ✓ ✓	<a href="#">Lists</a>	<a href="#">Providers</a>	<a href="#">Enable</a>	<a href="#">✕</a>
90 Day Program	90 Day Program	Programs	30Min	\$0	✓ ✓ ✓ ✓ ✓ ✓ ✓	<a href="#">Lists</a>	<a href="#">Providers</a>	<a href="#">Enable</a>	<a href="#">✕</a>

# Editing Services

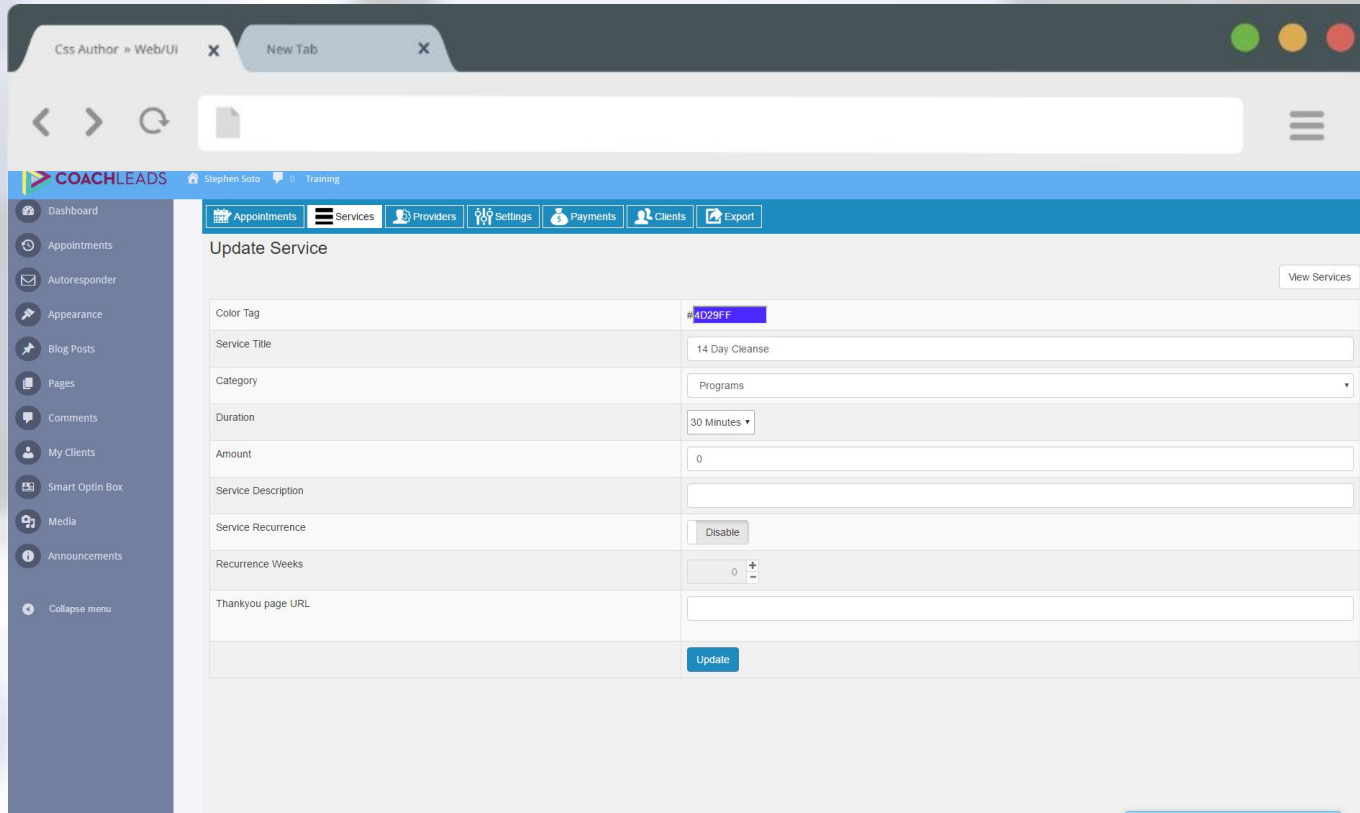
If you want to edit a service, click the button on the right side of your screen  
It looks like a “pencil” icon with a piece of “paper”  
This will take you to edit whichever service you want to change

The screenshot shows the COACHLEADS web application interface. The top navigation bar includes links for Appointments, Services, Providers, Settings, Payments, Clients, and Export. The left sidebar contains a menu with options like Dashboard, Appointments, Autoresponder, Appearance, Blog Posts, Pages, Comments, My Clients, Smart Optin Box, Media, Announcements, and Collapse menu. The main content area displays a table of services. A red arrow points to the edit button (pencil icon) for the '14 Day Cleanse' service.

Color Tag	Service Title	Category	Duration	Amount	Service Availability Su Mo Tu We Th Fr Sa	Service Lists	Providers	Service Status	
Blue	14 Day Cleanse	Programs	30Min	\$0	✓ ✓ ✓ ✓ ✓ ✓ ✓	Lists	Providers	Enable	 
Purple	30 Minute Phone Consultation	Phone Calls	30Min	\$0	✓ ✓ ✓ ✓ ✓ ✓ ✓	Lists	Providers	Enable	 
Green	90 Day Program	Programs	30Min	\$0	✓ ✓ ✓ ✓ ✓ ✓ ✓	Lists	Providers	Enable	 

# Editing Services

On this page, you will be able to edit settings for your service  
You can change the title, duration, amount, description, etc.  
Once you make your changes, click on “Update” at the bottom



The screenshot shows a web browser window with two tabs: 'Css Author » Web/UI' and 'New Tab'. The address bar is empty. The browser displays the COACHLEADS application interface. The top navigation bar is blue and contains the COACHLEADS logo, a user profile for 'Stephen Soto', and a 'Training' link. Below this is a secondary navigation bar with icons and labels for 'Appointments', 'Services' (which is active), 'Providers', 'Settings', 'Payments', 'Clients', and 'Export'. A left sidebar menu lists various application features: Dashboard, Appointments, Autoresponder, Appearance, Blog Posts, Pages, Comments, My Clients, Smart Optin Box, Media, Announcements, and a Collapse menu. The main content area is titled 'Update Service' and contains a form with the following fields: 'Color Tag' (set to #4D29FF), 'Service Title' (14 Day Cleanse), 'Category' (Programs), 'Duration' (30 Minutes), 'Amount' (0), 'Service Description' (empty), 'Service Recurrence' (Disable), 'Recurrence Weeks' (0), and 'Thankyou page URL' (empty). A 'View Services' button is located in the top right of the form area. An 'Update' button is positioned at the bottom right of the form.

Update Service	
Color Tag	#4D29FF
Service Title	14 Day Cleanse
Category	Programs
Duration	30 Minutes
Amount	0
Service Description	
Service Recurrence	Disable
Recurrence Weeks	0
Thankyou page URL	
<button>Update</button>	

APPOINTMENT SOFTWARE

# PROVIDERS

your providers are the coaches on  
your website that have their own  
programs and schedule



# Accessing Your Schedule

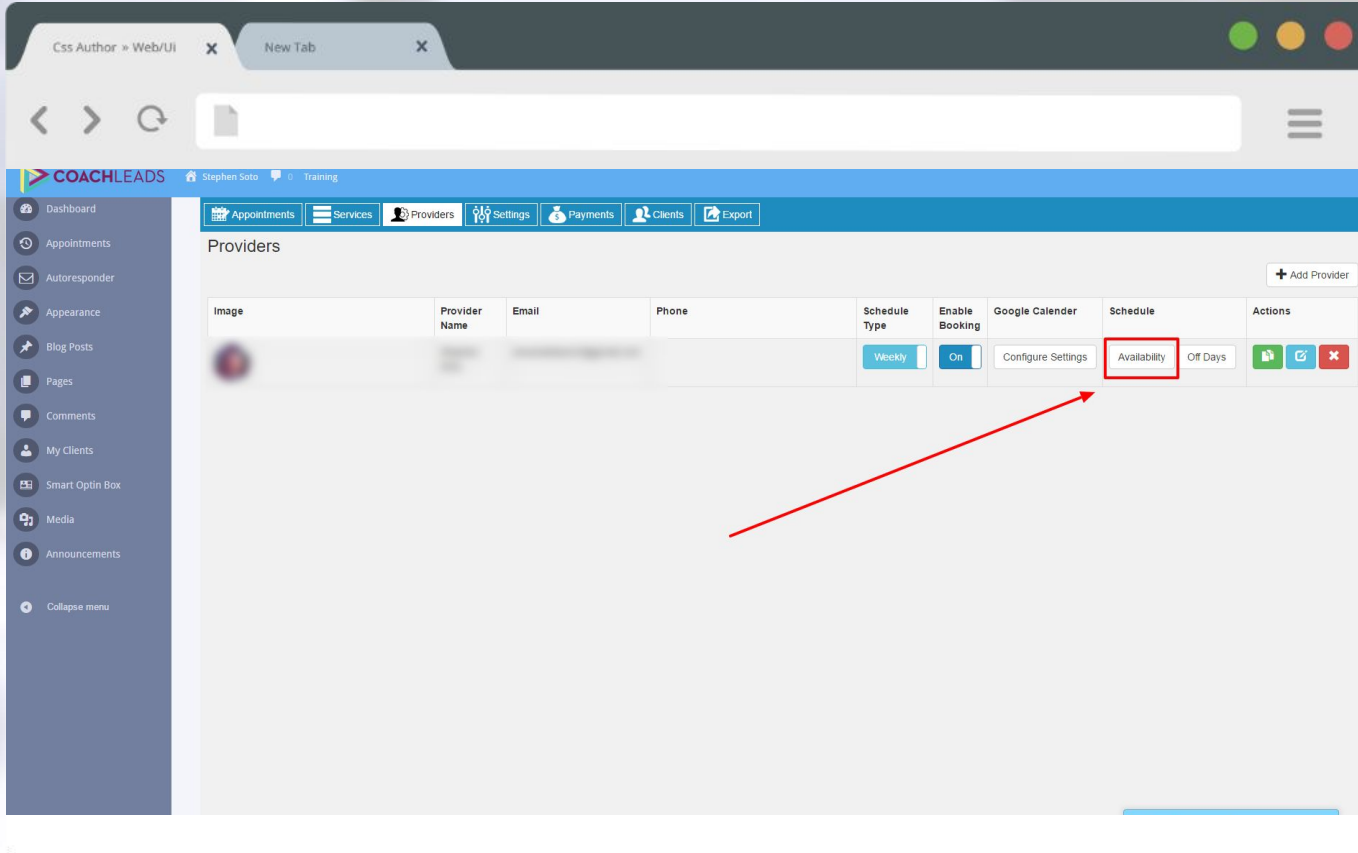
To access your Schedule, click on the tap at the top that says "Providers"  
On this page, you will be able to edit your availability  
You will also be able to integrate Google Calendar

The screenshot shows the COACHLEADS web application interface. The top navigation bar includes tabs for Appointments, Services, Providers (highlighted with a red box), Settings, Payments, Clients, and Export. Below the navigation bar, there are buttons for Book Appointment and Past Appointments, and a filter dropdown for 'Filter By Service Provider'. The main content area displays a calendar for December 2016, with a red arrow pointing from the 'Providers' tab to the 'Past Appointments' button. The calendar shows dates from Sunday to Saturday, with some dates highlighted in yellow.





Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24

# Accessing Your Schedule

Once you are on the Providers page, click on the button that says “Availability”  
The next page will allow you to set your schedule for each day of the week!



The screenshot shows a web browser window with two tabs: 'Css Author » Web/UI' and 'New Tab'. The address bar is empty. The CoachLeads dashboard is visible, with a sidebar on the left containing links to Dashboard, Appointments, Autoresponder, Appearance, Blog Posts, Pages, Comments, My Clients, Smart Optin Box, Media, Announcements, and Collapse menu. The top navigation bar includes links to Appointments, Services, Providers, Settings, Payments, Clients, and Export. The main content area is titled 'Providers' and features a table with columns: Image, Provider Name, Email, Phone, Schedule Type, Enable Booking, Google Calendar, Schedule, and Actions. The first row of the table shows a provider with a profile picture, a blurred name, and a blurred email. The 'Schedule Type' is set to 'Weekly', 'Enable Booking' is 'On', and 'Google Calendar' is 'Configure Settings'. The 'Schedule' column has a red box around the 'Availability' button, with a red arrow pointing to it from below. The 'Actions' column contains three icons: a green plus, a blue square, and a red X. A '+ Add Provider' button is located in the top right corner of the Providers section.

Image	Provider Name	Email	Phone	Schedule Type	Enable Booking	Google Calendar	Schedule	Actions
	[Blurred]	[Blurred]		Weekly	On	Configure Settings	Availability	  

# Editing Your Schedule

Here you are able to set your schedule for each day of the week  
For the days you want to have off, click 8:00am and scroll to the very top  
If you want to add breaks, save the schedule first, and then add your breaks

COACHLEADS Stephen Soto Training

Appointments Services Providers Settings Payments Clients Export

### Availability Schedule

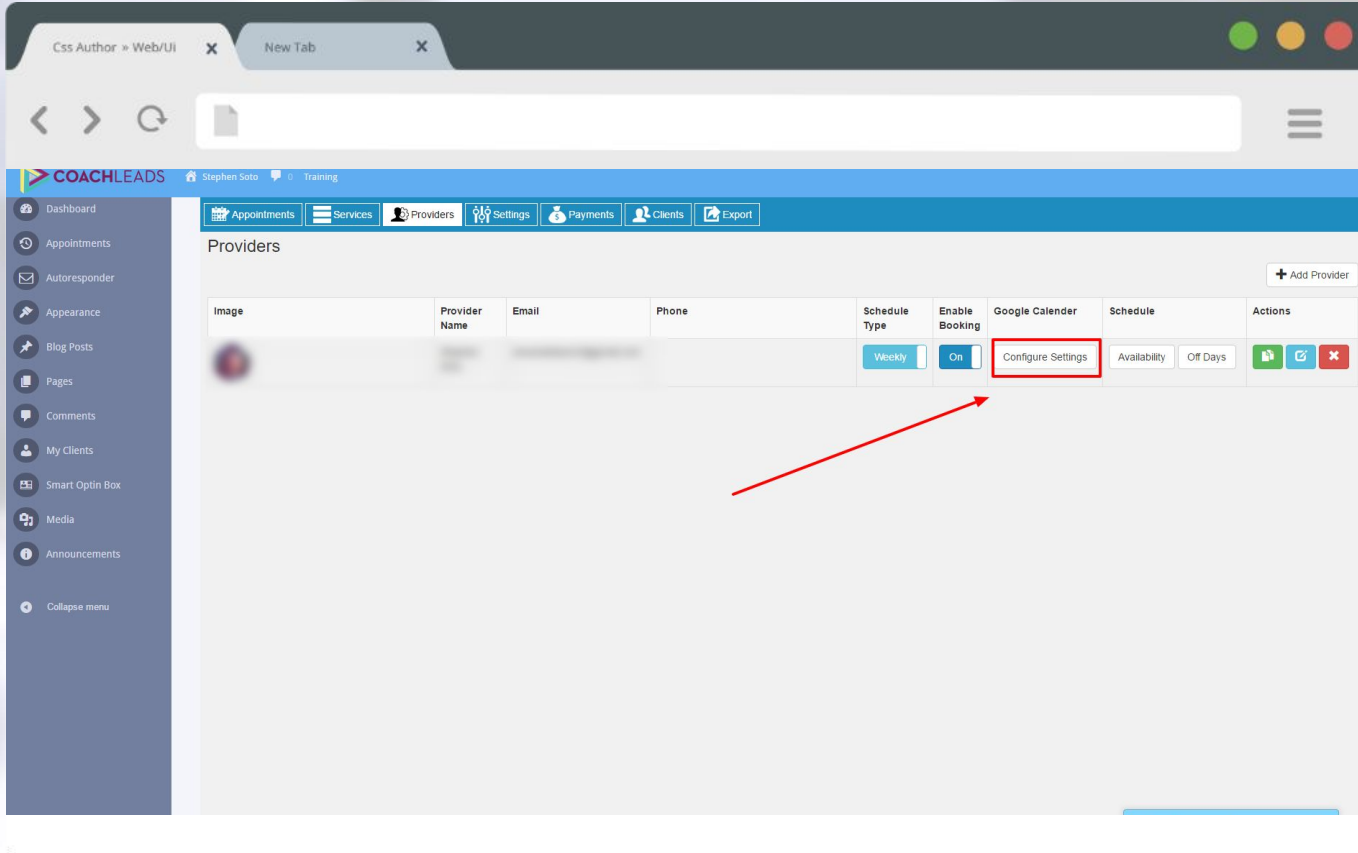
Monday	8:00 am	To	5:00 pm	+ Add Breaks
Tuesday	8:00 am	To	5:00 pm	+ Add Breaks
Wednesday	8:00 am	To	5:00 pm	+ Add Breaks
Thursday	8:00 am	To	5:00 pm	+ Add Breaks
Friday	8:00 am	To	5:00 pm	+ Add Breaks
Saturday	8:00 am	To	5:00 pm	+ Add Breaks
Sunday	8:00 am	To	5:00 pm	+ Add Breaks

Time Zone (GMT-08:00) Pacific Time (US & Canada)


Update Schedule

# Integrating Google Calendar

To integrate Google Calendar, click on the “Configure Settings” button  
This will take you to another page that will start the integration process



The screenshot shows the COACHLEADS web application interface. The top navigation bar includes the COACHLEADS logo, user profile (Stephen Soto), and training status. The main navigation menu on the left lists various features like Dashboard, Appointments, Autoresponder, Appearance, Blog Posts, Pages, Comments, My Clients, Smart Optin Box, Media, Announcements, and Collapse menu. The top right navigation bar contains links for Appointments, Services, Providers, Settings, Payments, Clients, and Export. The main content area displays the 'Providers' table, which has columns for Image, Provider Name, Email, Phone, Schedule Type, Enable Booking, Google Calendar, Schedule, and Actions. A red arrow points to the 'Configure Settings' button in the Google Calendar column of the first provider row.

Image	Provider Name	Email	Phone	Schedule Type	Enable Booking	Google Calendar	Schedule	Actions
				Weekly	On	<a href="#">Configure Settings</a>	Availability Off Days	<a href="#">Add</a> <a href="#">Edit</a> <a href="#">Delete</a>



# Integrating Google Calendar

You want both of these buttons on this screen to be set to “Yes”  
Next, go ahead and click on “Verify Account” below to login to your account  
After this is done, click on “Save Settings” below

The screenshot displays the 'Provider Google Calendar Configuration' settings page in the CoachLeads application. The page features a sidebar with navigation options and a main content area with configuration settings. The 'Google Credential Settings' section includes two toggle switches: 'Add Appointments To Google Calendar' and 'Two Way Sync'. Both toggles are currently set to 'Yes'. A red arrow points to the 'Yes' button of the first toggle. Below the toggles is a 'Verify Account' link and a 'Save Settings' button.

Google Credential Settings	
Add Appointments To Google Calendar	<input checked="" type="checkbox"/> Yes
Two Way Sync	<input checked="" type="checkbox"/> Yes

Verify Account

Save Settings

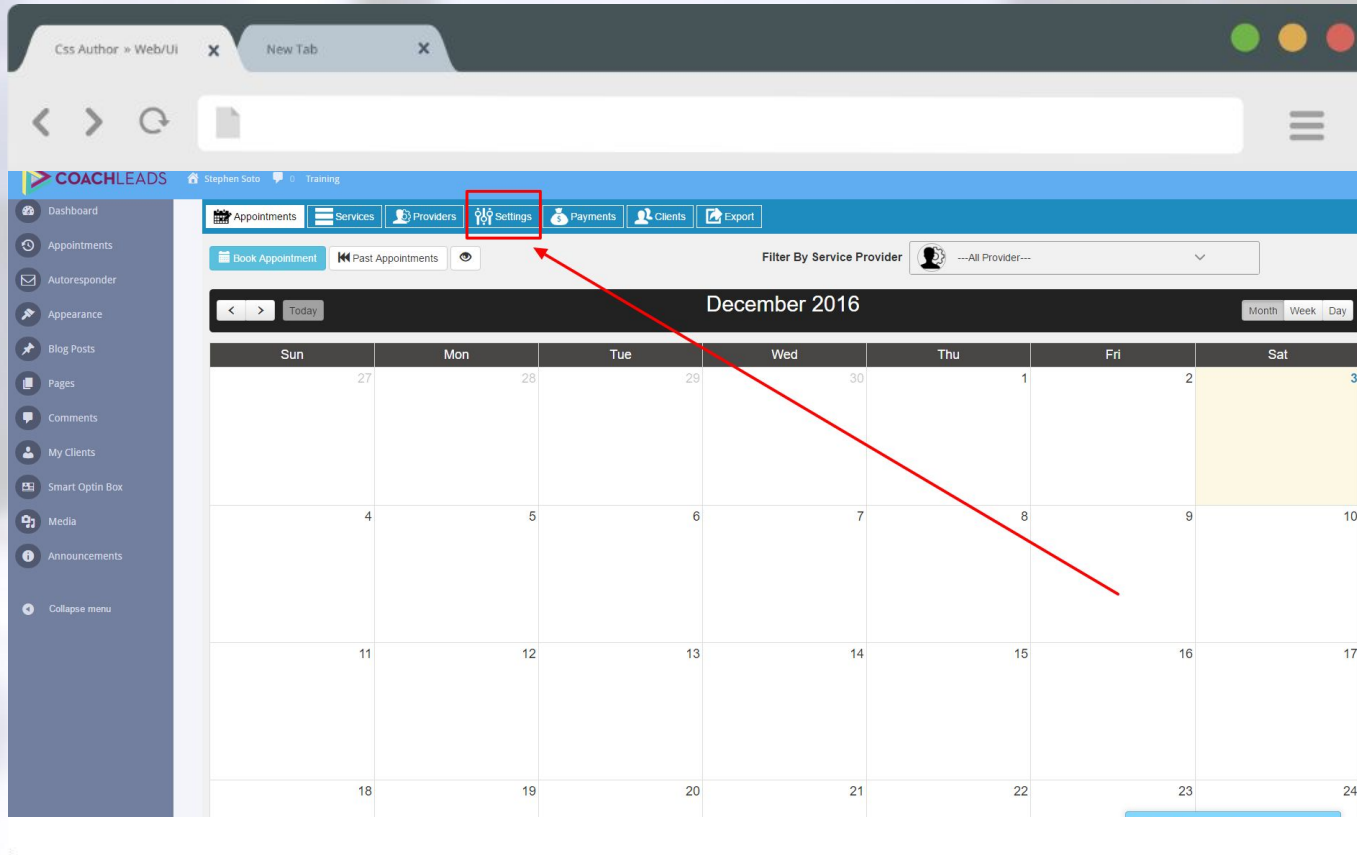
# CHANGING YOUR **SETTINGS**

you are able to customize the settings  
in your appointment software such  
as your schedule, look, and other features



# Accessing Your Settings

To access your Settings, click on the tap at the top that says "Settings"  
On this page, you will be able to edit your appointment schedule settings  
You will also be able to integrate payments (PayPal and Stripe)

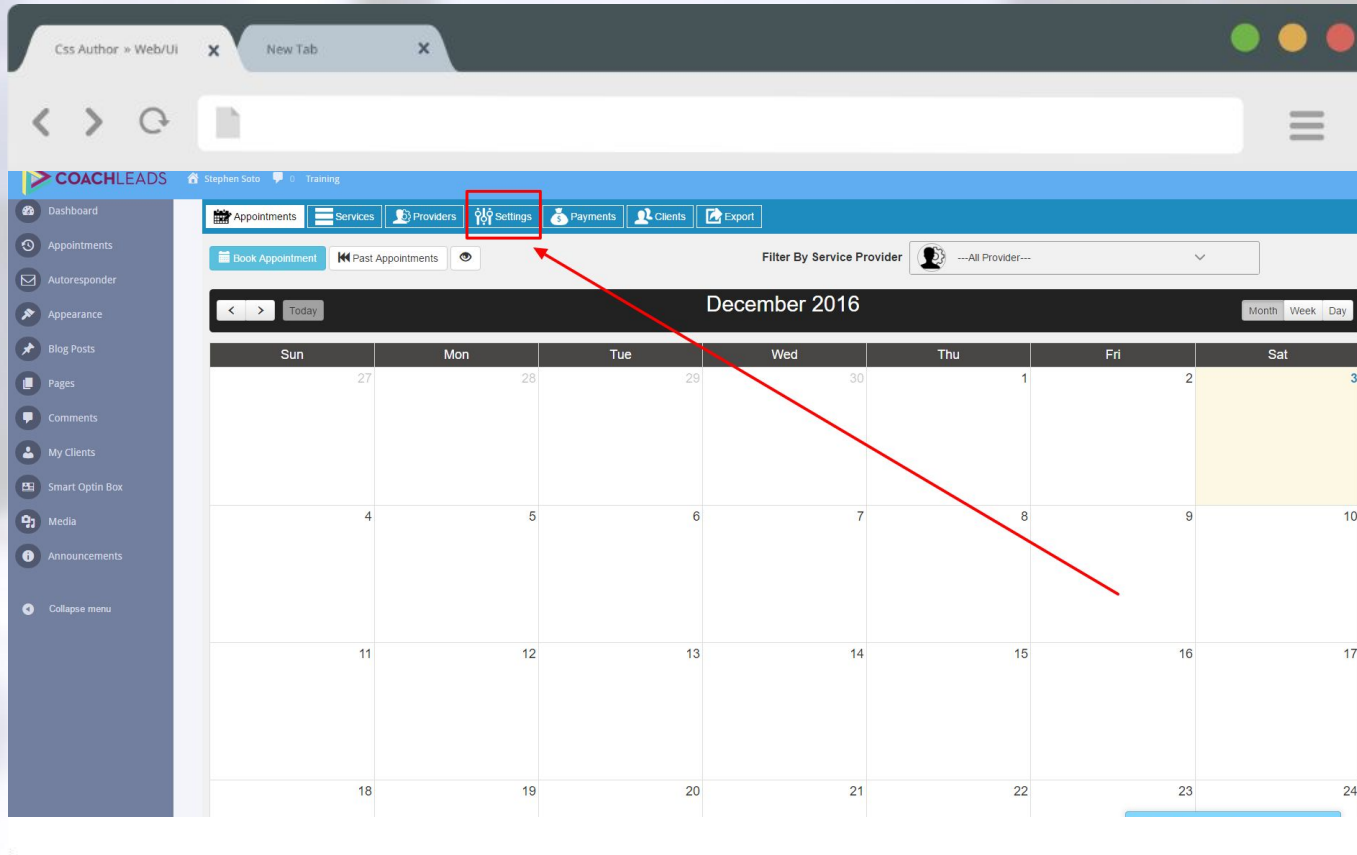


The screenshot displays the CoachLeads web application interface. The top navigation bar includes tabs for Appointments, Services, Providers, Settings (highlighted with a red box and a red arrow), Payments, Clients, and Export. The left sidebar lists various dashboard options: Dashboard, Appointments, Autoresponder, Appearance, Blog Posts, Pages, Comments, My Clients, Smart Optin Box, Media, Announcements, and Collapse menu. The main content area shows a calendar for December 2016, with a filter by service provider set to 'All Provider'. The calendar grid shows dates from Sunday to Saturday, with some dates highlighted in yellow.

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SETTINGS

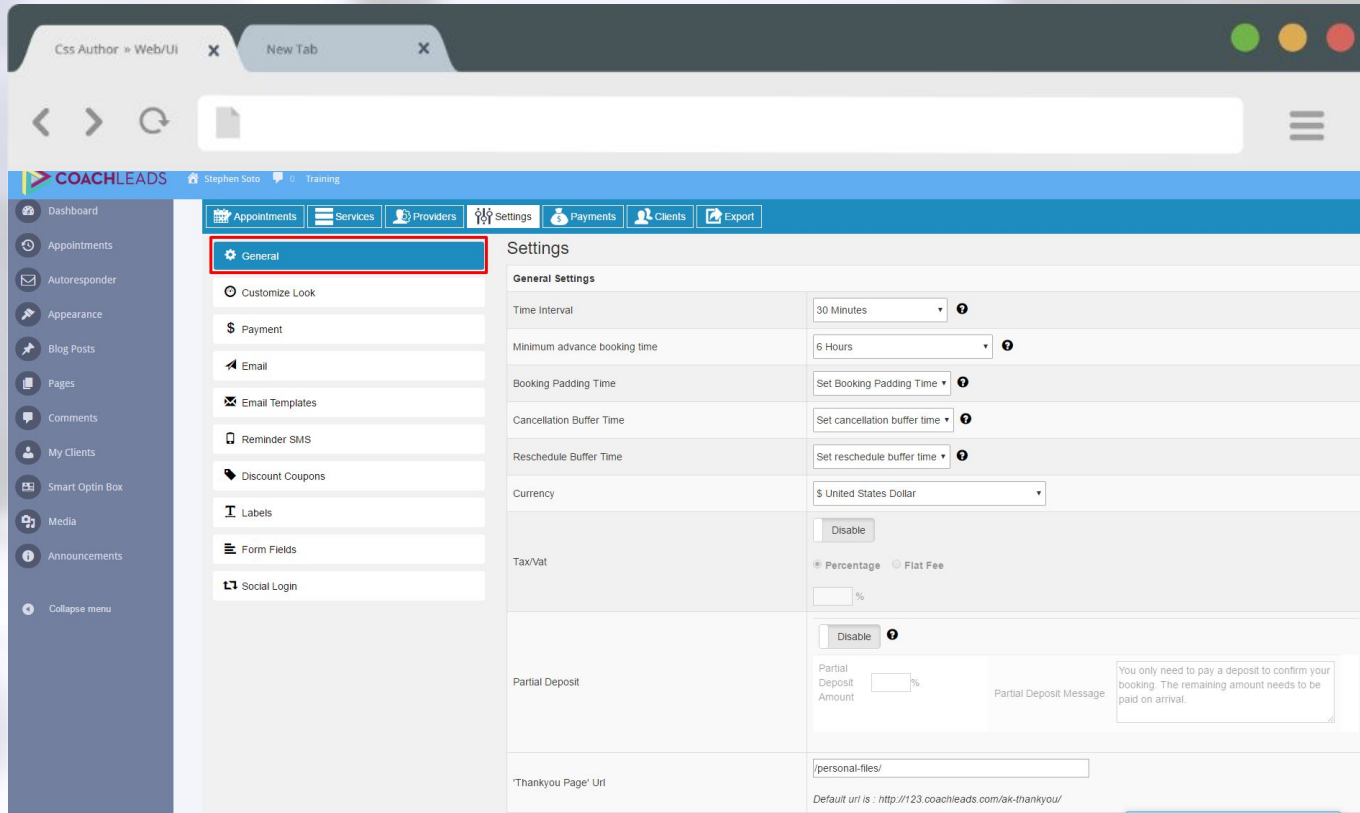
# GENERAL SETTINGS

this sections is where you can edit some of the general settings of your appointment software and integrate payments



# General Settings

Here you will be able to edit time intervals, booking time, and buffer time  
You can also edit currency, Company Settings, and more!

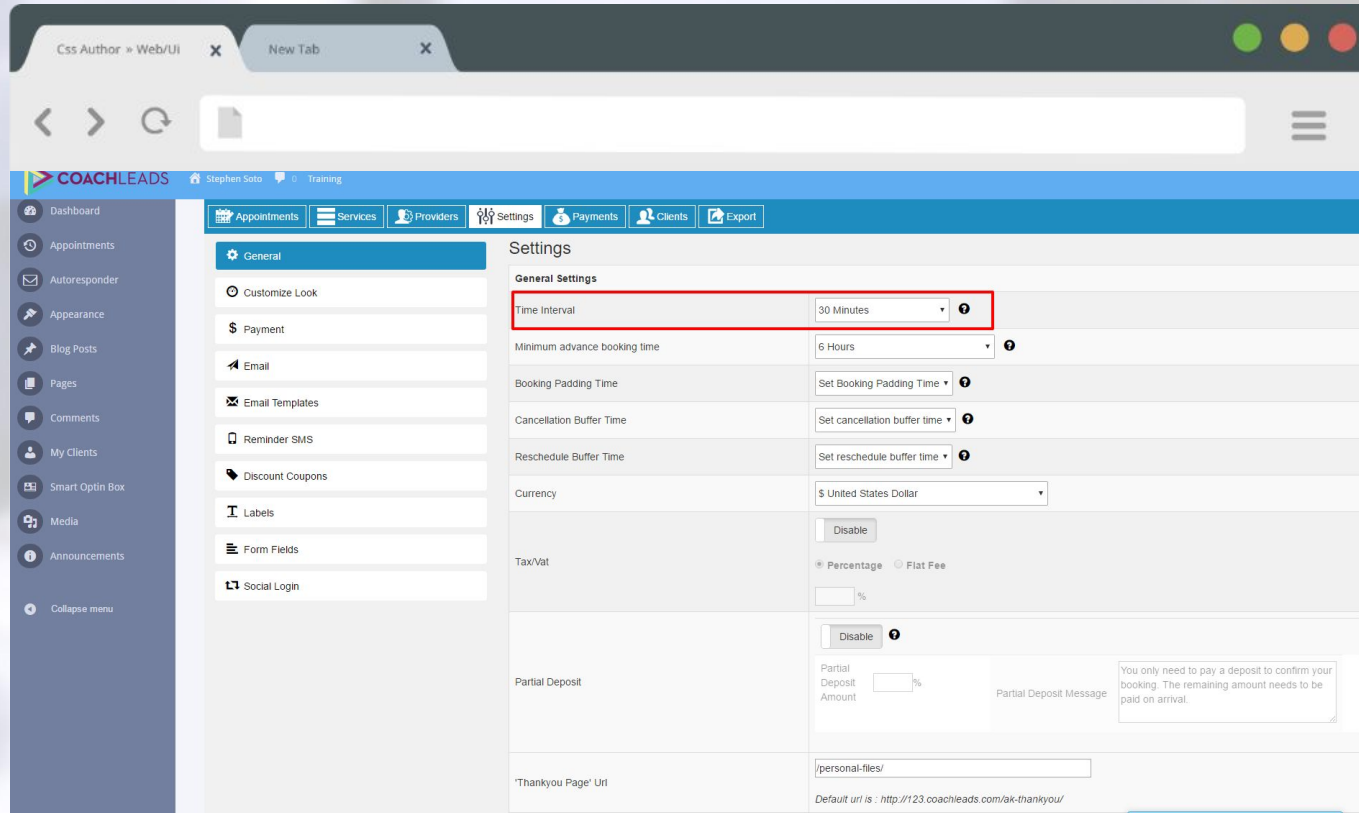


The screenshot shows a web browser window with two tabs: 'Css Author » Web/UI' and 'New Tab'. The address bar is empty. The page header for 'COACHLEADS' includes a user profile 'Stephen Soto' and a 'Training' link. A navigation bar contains links for 'Appointments', 'Services', 'Providers', 'Settings' (highlighted), 'Payments', 'Clients', and 'Export'. A left sidebar lists various settings categories: 'General' (highlighted with a red box), 'Customize Look', 'Payment', 'Email', 'Email Templates', 'Reminder SMS', 'Discount Coupons', 'Labels', 'Form Fields', and 'Social Login'. The main content area is titled 'Settings' and contains a 'General Settings' section with the following fields:

General Settings	
Time Interval	30 Minutes <span>?</span>
Minimum advance booking time	6 Hours <span>?</span>
Booking Padding Time	Set Booking Padding Time <span>?</span>
Cancellation Buffer Time	Set cancellation buffer time <span>?</span>
Reschedule Buffer Time	Set reschedule buffer time <span>?</span>
Currency	\$ United States Dollar
	<input type="checkbox"/> Disable
Tax/Vat	<input checked="" type="radio"/> Percentage <input type="radio"/> Flat Fee <input type="text"/> %
	<input type="checkbox"/> Disable <span>?</span>
Partial Deposit	Partial Deposit Amount <input type="text"/> % Partial Deposit Message <div>You only need to pay a deposit to confirm your booking. The remaining amount needs to be paid on arrival.</div>
'Thankyou Page' Uri	/personal-files/ Default uri is : http://123.coachleads.com/thankyou/

# General: Time Intervals

Time intervals controls the time difference between available time slots  
For instance, if your schedule is from 9am to 5pm and it's set to 30 minutes:  
clients will be able to book every 30 minutes from 9am to 5pm



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CoachLeads Stephen Soto Training

Appointments Services Providers Settings Payments Clients Export

General

Customize Look

Payment

Email

Email Templates

Reminder SMS

Discount Coupons

Labels

Form Fields

Social Login

Settings

General Settings

Time Interval 30 Minutes

Minimum advance booking time 6 Hours

Booking Padding Time Set Booking Padding Time

Cancellation Buffer Time Set cancellation buffer time

Reschedule Buffer Time Set reschedule buffer time

Currency \$ United States Dollar

Disable

Tax/Vat Percentage Flat Fee

Partial Deposit

Partial Deposit Amount

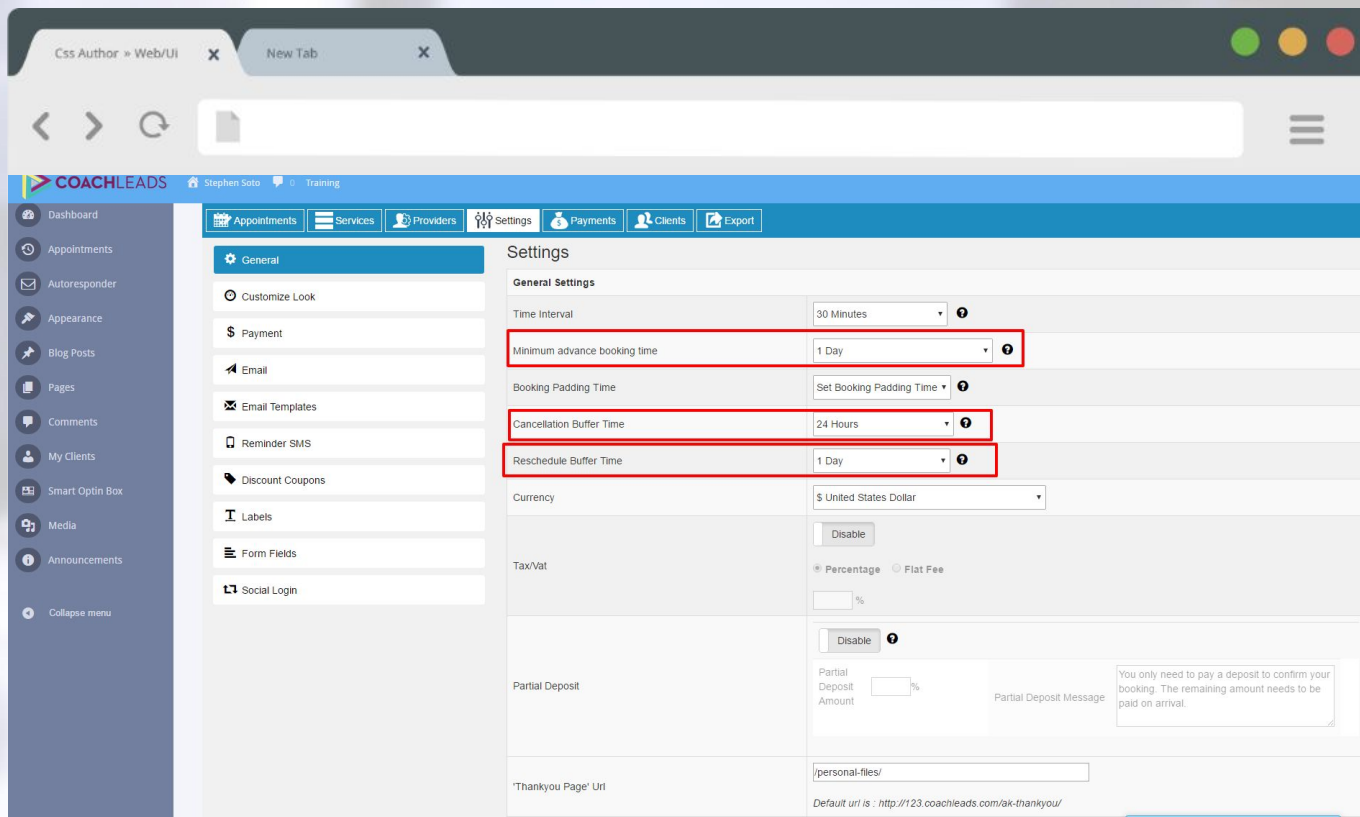
Partial Deposit Message

Thankyou Page Uri /personal-files/

Default uri is : http://123.coachleads.com/ak-thankyou/

# General: Booking and Buffer Time

For booking and buffer time, we recommend using at least 1 day  
This means that people will have to book or cancel 1 day in advance  
They will also have to reschedule 1 day in advance



The screenshot shows the CoachLeads web interface. The left sidebar contains a menu with options: Dashboard, Appointments, Autoresponder, Appearance, Blog Posts, Pages, Comments, My Clients, Smart Optin Box, Media, Announcements, and Collapse menu. The main content area is titled 'Settings' and includes a 'General' section on the left with sub-options: General, Customize Look, Payment, Email, Email Templates, Reminder SMS, Discount Coupons, Labels, Form Fields, and Social Login. The 'General Settings' section on the right contains the following fields:

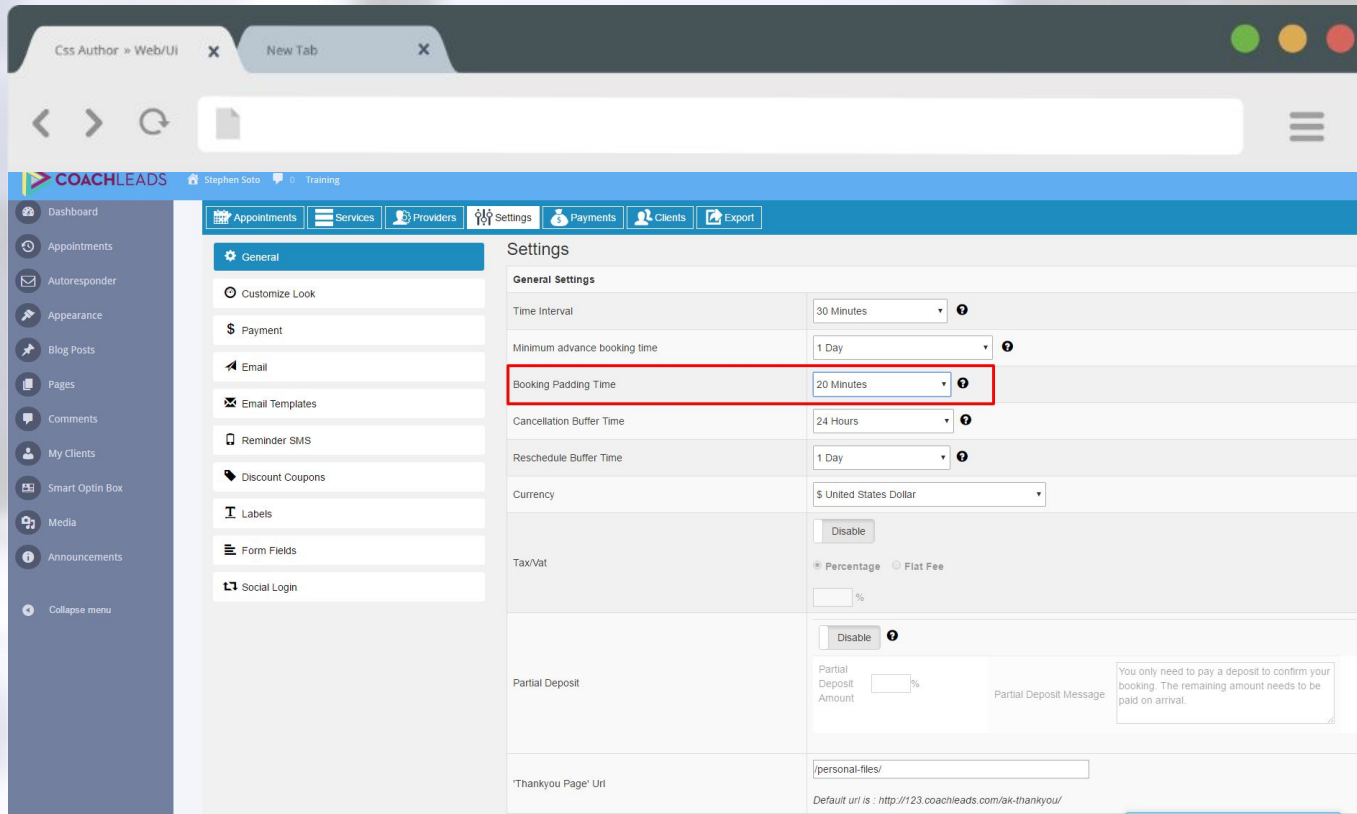
- Time Interval: 30 Minutes
- Minimum advance booking time: 1 Day
- Booking Padding Time: Set Booking Padding Time
- Cancellation Buffer Time: 24 Hours
- Reschedule Buffer Time: 1 Day
- Currency: \$ United States Dollar
- Tax/Vat: Disable
- Partial Deposit: Partial Deposit Amount (input field) and Partial Deposit Message (text area)
- 'Thankyou Page' Uri: /personal-files/

Red boxes highlight the 'Minimum advance booking time', 'Cancellation Buffer Time', and 'Reschedule Buffer Time' fields, all set to 1 Day. A note at the bottom right states: 'You only need to pay a deposit to confirm your booking. The remaining amount needs to be paid on arrival.'



# General: Booking Padding

Booking Padding Time is the time you need in between appointments  
This is to give you time in between calls to prepare for your next session  
You can set this anywhere from 10 minutes to 1 hour



The screenshot shows a web browser window with two tabs: 'Css Author » Web/UI' and 'New Tab'. The browser address bar is empty. Below the browser window is the CoachLeads application interface. The top navigation bar is blue and contains the CoachLeads logo, a user profile icon for 'Stephen Soto', and a 'Training' link. Below this is a secondary navigation bar with icons and labels for 'Appointments', 'Services', 'Providers', 'Settings' (which is highlighted), 'Payments', 'Clients', and 'Export'. On the left side of the 'Settings' page is a sidebar menu with icons and labels for 'Dashboard', 'Appointments', 'Autoresponder', 'Appearance', 'Blog Posts', 'Pages', 'Comments', 'My Clients', 'Smart Optin Box', 'Media', 'Announcements', and 'Collapse menu'. The main content area of the 'Settings' page is titled 'Settings' and contains a 'General Settings' section. This section has a list of settings on the left and their values on the right. The 'Booking Padding Time' setting is highlighted with a red rectangle. The values for the other settings are: Time Interval (30 Minutes), Minimum advance booking time (1 Day), Cancellation Buffer Time (24 Hours), Reschedule Buffer Time (1 Day), Currency (\$ United States Dollar), Tax/Vat (Disable), Partial Deposit (Amount: 0%, Partial Deposit Message: 'You only need to pay a deposit to confirm your booking. The remaining amount needs to be paid on arrival.'), and 'Thankyou Page' Uri (/personal-files/). The default uri is noted as http://123.coachleads.com/ak-thankyou/.

General Settings	
Time Interval	30 Minutes
Minimum advance booking time	1 Day
Booking Padding Time	20 Minutes
Cancellation Buffer Time	24 Hours
Reschedule Buffer Time	1 Day
Currency	\$ United States Dollar
Tax/Vat	Disable
Partial Deposit	Amount: 0% Partial Deposit Message: You only need to pay a deposit to confirm your booking. The remaining amount needs to be paid on arrival.
'Thankyou Page' Uri	/personal-files/ Default uri is : http://123.coachleads.com/ak-thankyou/

# General: Company Settings

At the bottom of the General Setting section is your Company Settings section  
Go ahead and enter your company name here  
Also upload your logo. Click “Save Settings” when finished

The screenshot shows a web browser window with the COACHLEADS application. The browser tabs are 'Css Author » Web/UI' and 'New Tab'. The address bar is empty. The application header shows 'COACHLEADS' and user information 'Stephen Soto' and 'Training'. The left sidebar contains navigation links: 'My Clients', 'Smart Optin Box', 'Media', 'Announcements', and 'Collapse menu'. The main content area is divided into two columns. The left column has a list of settings: 'Reminder SMS', 'Discount Coupons', 'Labels', 'Form Fields', and 'Social Login'. The right column contains various settings: 'Reschedule Buffer Time' (set to '1 Day'), 'Currency' (set to '\$ United States Dollar'), 'Tax/Vat' (with 'Disable' and 'Percentage' options), 'Partial Deposit' (with 'Disable' and 'Partial Deposit Message' options), 'Thankyou Page' Uri (set to '/personal-files/'), and 'Allow multiple booking for same timeslot' (with 'Disable' option). At the bottom, the 'Company Settings' section is highlighted with a red box. It contains 'Company Name' (with an input field) and 'Company Logo' (with a 'Choose File' button and a note '(Recommended image size 150px X 60px)'). A 'Save Settings' button is located at the bottom left of the settings area.

COACHLEADS Stephen Soto Training

My Clients  
Smart Optin Box  
Media  
Announcements  
Collapse menu

Reminder SMS  
Discount Coupons  
Labels  
Form Fields  
Social Login

Reschedule Buffer Time: 1 Day  
Currency: \$ United States Dollar  
Tax/Vat: Disable  
Partial Deposit: Disable  
Thankyou Page' Uri: /personal-files/  
Allow multiple booking for same timeslot: Disable

**Company Settings**  
Company Name:   
Company Logo:  No file chosen  
(Recommended image size 150px X 60px)

Save Settings

GENERAL SETTINGS

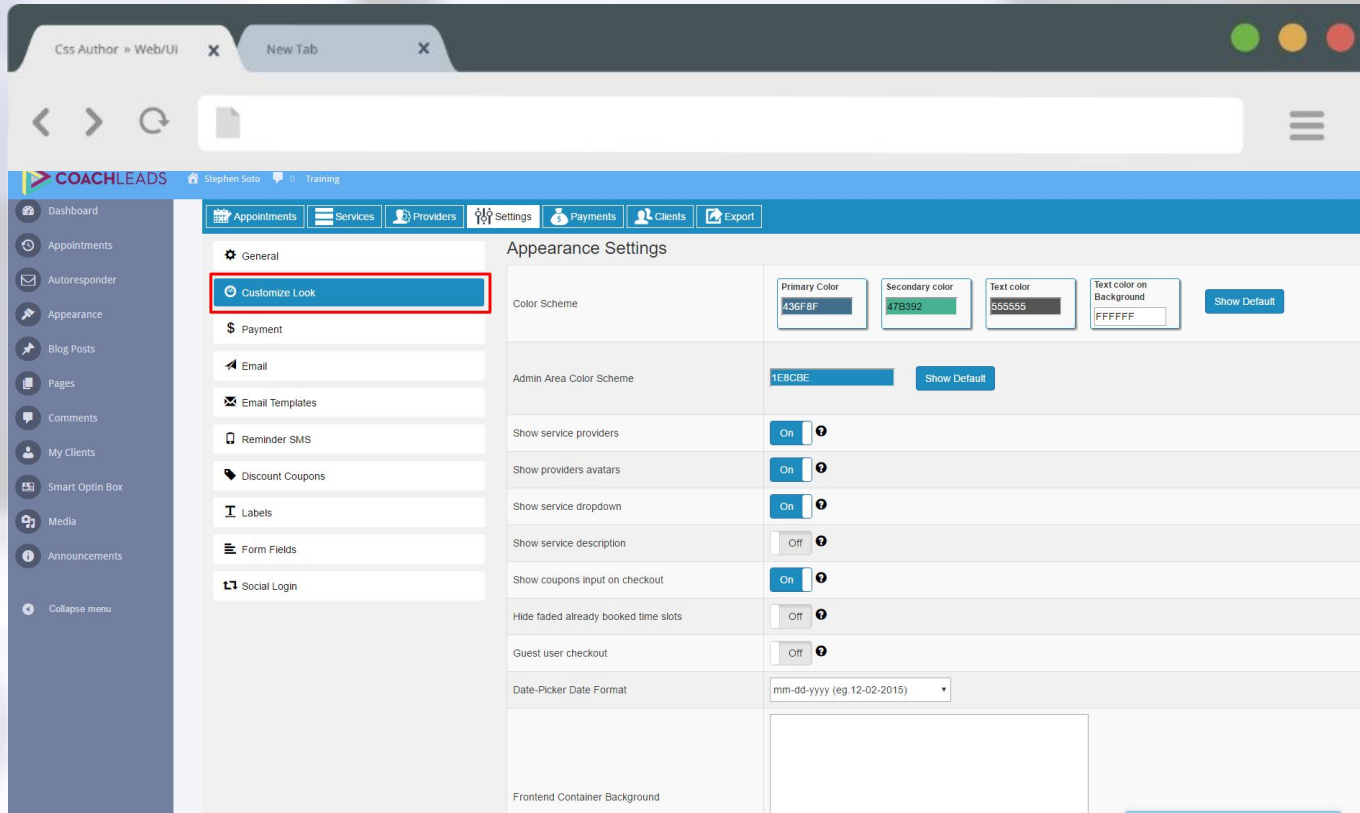
# CUSTOMIZE LOOK

this sections is where you can edit some of the general settings of your appointment software and integrate payments



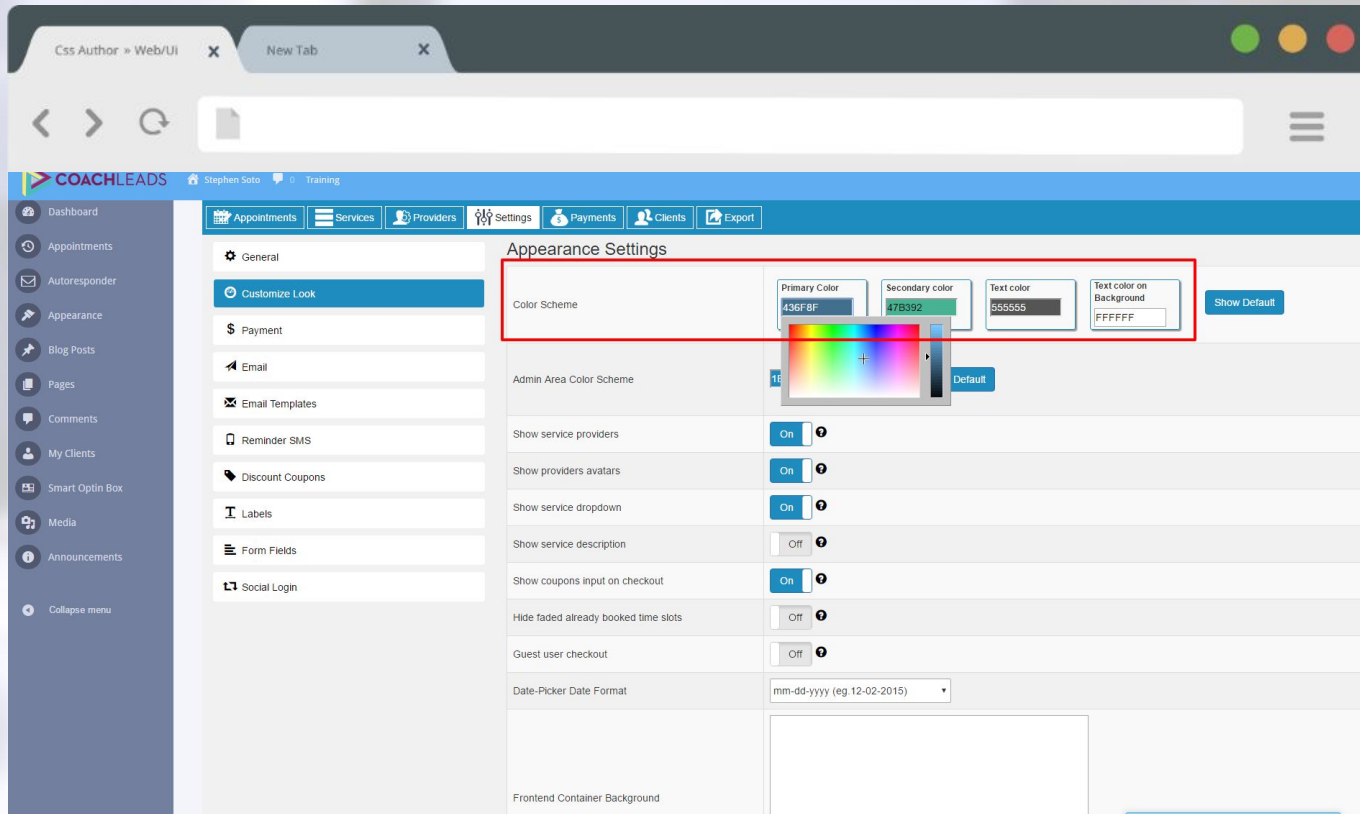
# Customize Look

Here you will be able to customize the look of your booking calendar  
You will be able to edit the color scheme as well as options that show up



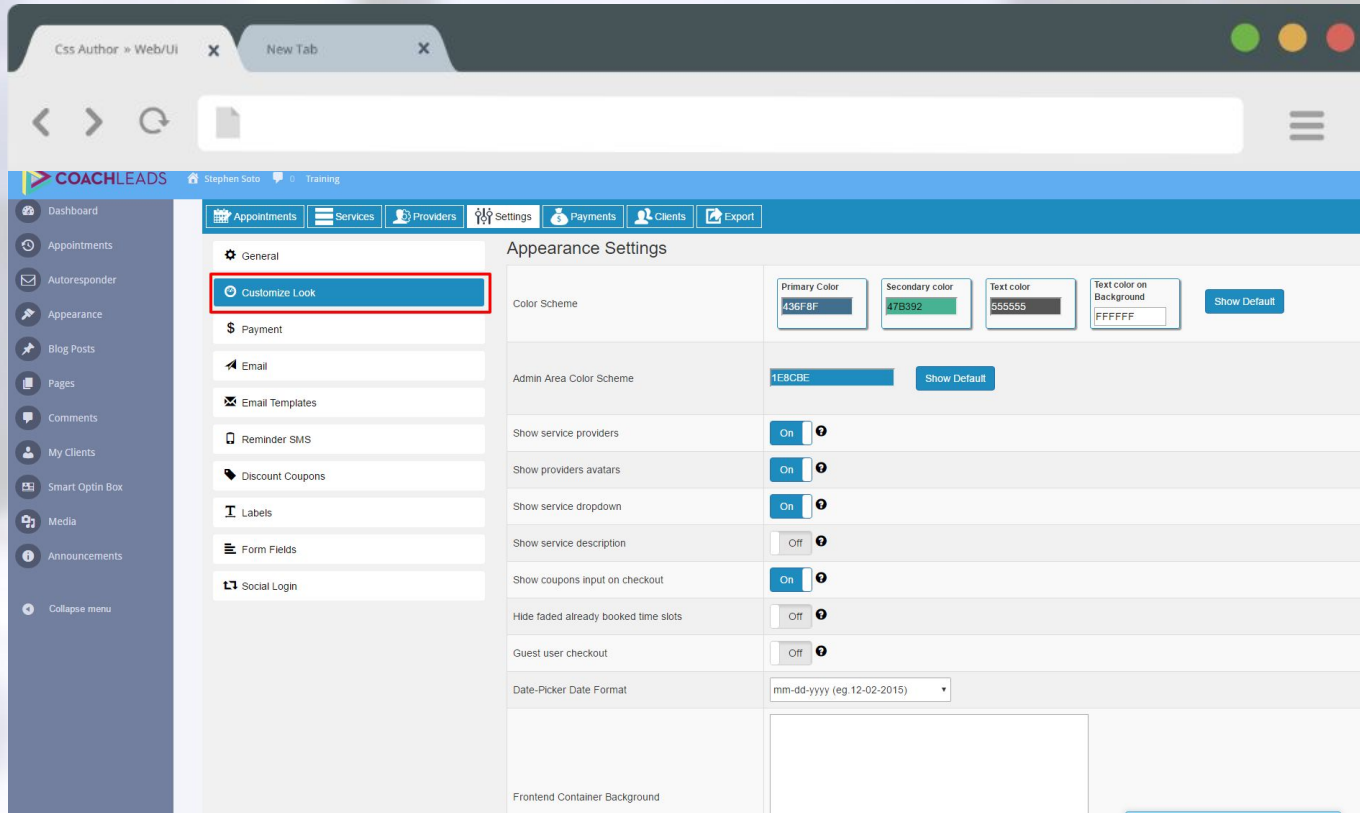
# Customize Look: Color Scheme

To edit the color scheme, click the numbers in the boxes that show each color  
This will bring up a menu that allows you to drag and select a color  
This will give you the exact “hex code,” or color code” for the color you selected



# General Settings

Here you will be able to customize the look of your booking calendar  
You will be able to edit the color scheme as well as options that show up



PAYMENTS

# PAYPAL INTEGRATION

will allow you to integrate your PayPal account with your CoachLeads website so you can take payments directly



# Payments: PayPal Options

Disable All Payment Gateways: set to "No"  
PayPal Express Checkout: set to "Enable"  
PayPal Guest Payment: set to "Enable"

The screenshot displays the COACHLEADS web application interface. The top navigation bar includes links for Appointments, Services, Providers, Settings, Payments, Clients, and Export. The left sidebar lists various management options such as Dashboard, Appointments, Autoresponder, Appearance, Blog Posts, Pages, Comments, My Clients, Smart Optin Box, Media, Announcements, and Collapse menu. The main content area is titled 'Payment Gateways' and contains the following settings:

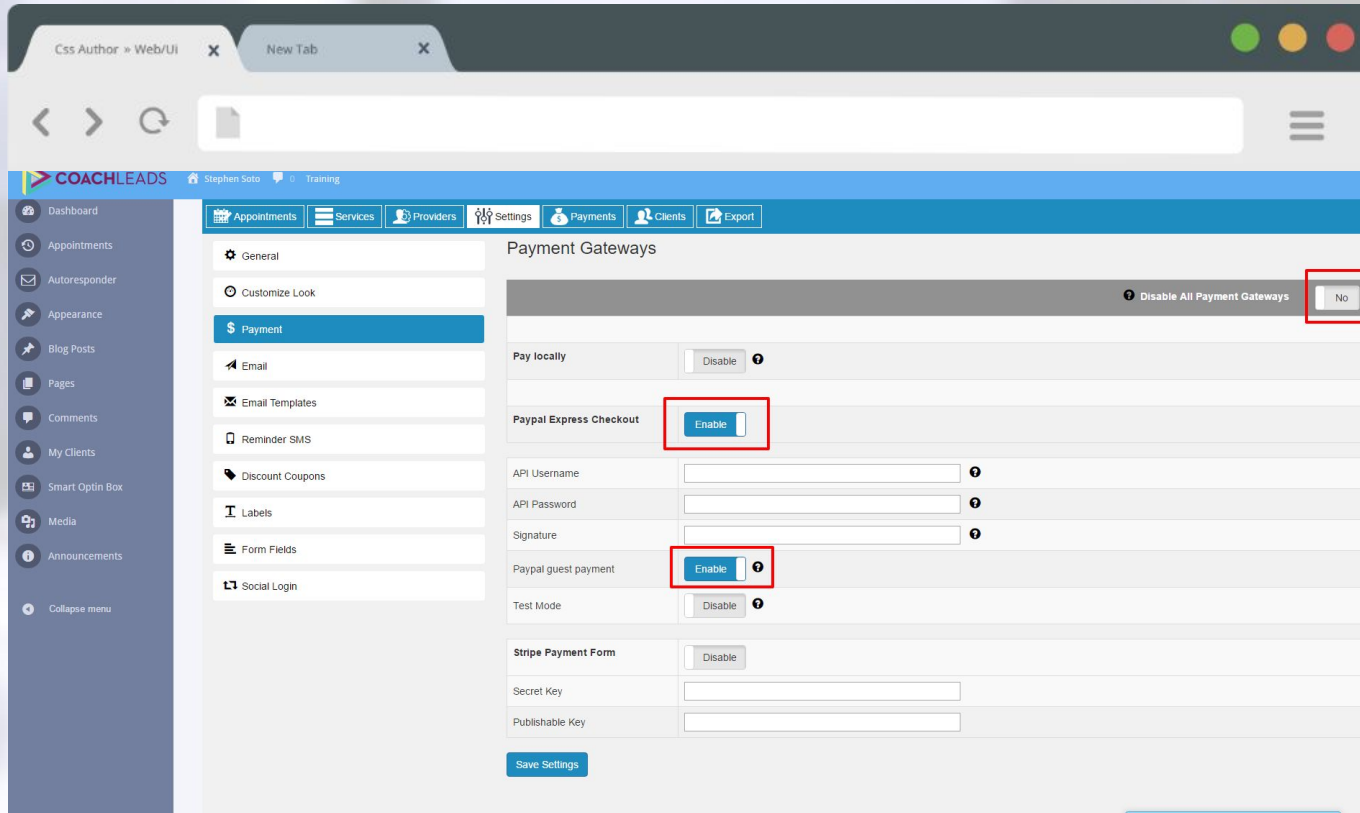
- Disable All Payment Gateways:** A toggle switch set to 'No' (highlighted with a red box).
- Pay locally:** A toggle switch set to 'Disable'.
- Paypal Express Checkout:** A toggle switch set to 'Enable' (highlighted with a red box).
- API Username:** An input field.
- API Password:** An input field.
- Signature:** An input field.
- Paypal guest payment:** A toggle switch set to 'Enable' (highlighted with a red box).
- Test Mode:** A toggle switch set to 'Disable'.
- Stripe Payment Form:** A toggle switch set to 'Disable'.
- Secret Key:** An input field.
- Publishable Key:** An input field.

A 'Save Settings' button is located at the bottom of the settings form.



# Payments: API Information

Next, you will need to get your API Username, Password, and Signature  
You will have to get this information from the PayPal website  
You will have to copy and paste each of these from PayPal into this section



The screenshot shows the COACHLEADS web application interface. The top navigation bar includes links for Appointments, Services, Providers, Settings, Payments, Clients, and Export. The left sidebar contains a menu with options like Dashboard, Appointments, Autoresponder, Appearance, Blog Posts, Pages, Comments, My Clients, Smart Optin Box, Media, Announcements, and Collapse menu. The main content area is titled "Payment Gateways" and features a "Disable All Payment Gateways" button (highlighted with a red box) and a "No" button. Below this, there are sections for "Pay locally" (Disable), "Paypal Express Checkout" (Enable button highlighted with a red box), "Paypal guest payment" (Enable button highlighted with a red box), "Test Mode" (Disable), and "Stripe Payment Form" (Disable). The "Paypal Express Checkout" section includes input fields for API Username, API Password, and Signature, each with an information icon. The "Paypal guest payment" section includes input fields for Secret Key and Publishable Key. A "Save Settings" button is located at the bottom.

PAYPAL

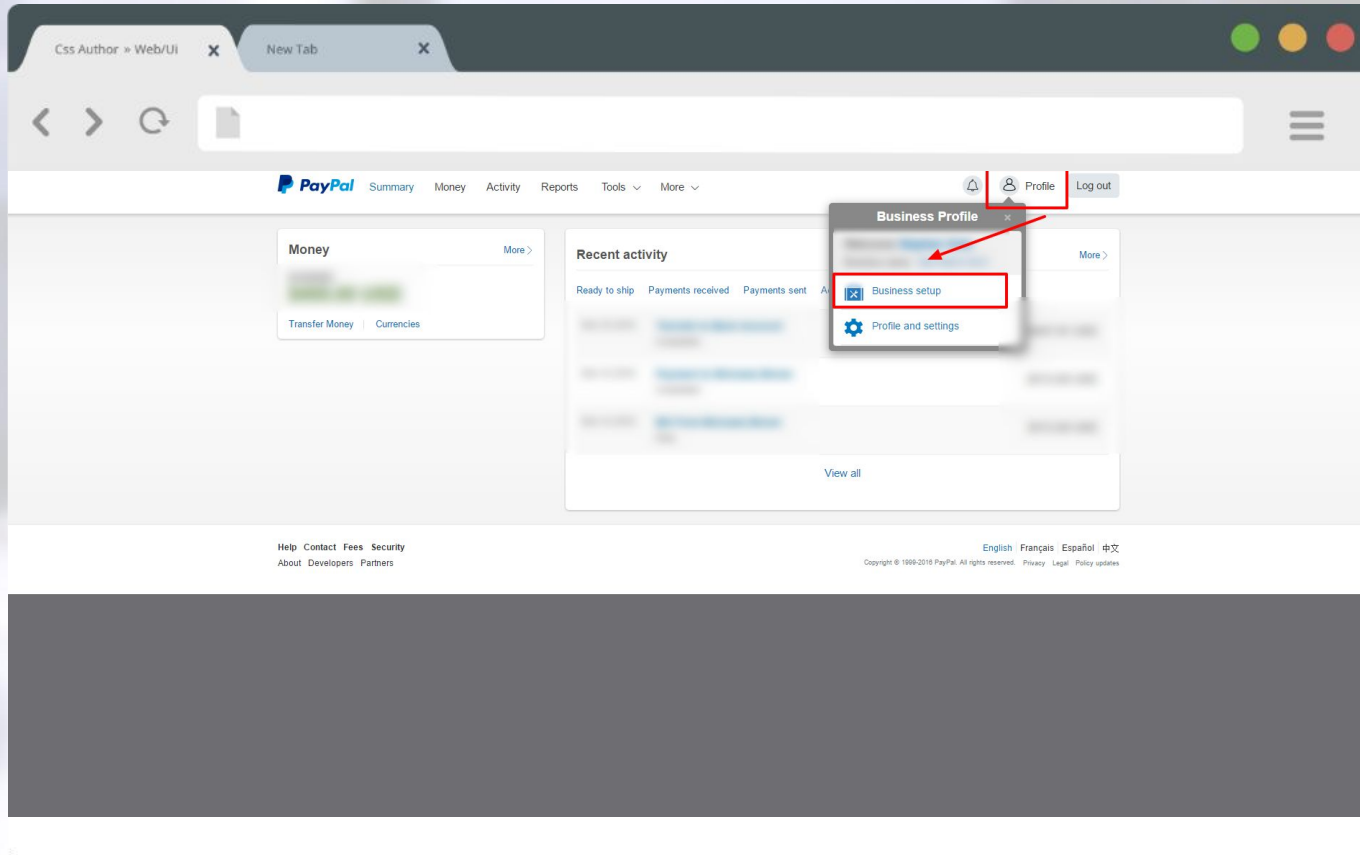
# API CREDENTIALS

are the specific codes you will need to get from PayPal and copy and paste into the Payments section of your Settings



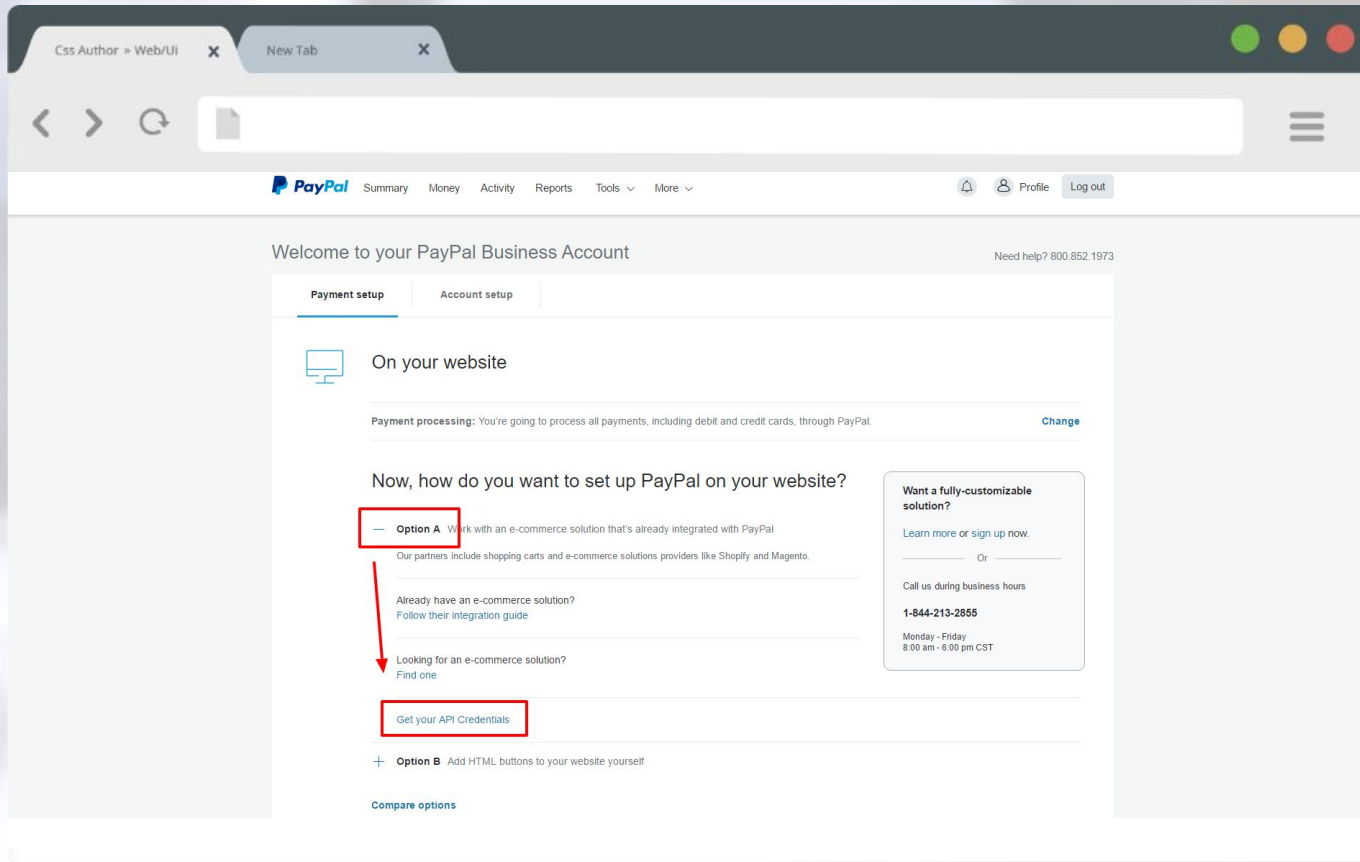
# PayPal: API Credentials

Once you have logged into PayPal, click on “Profile” in the upper right corner  
Next, click on “Business Setup”



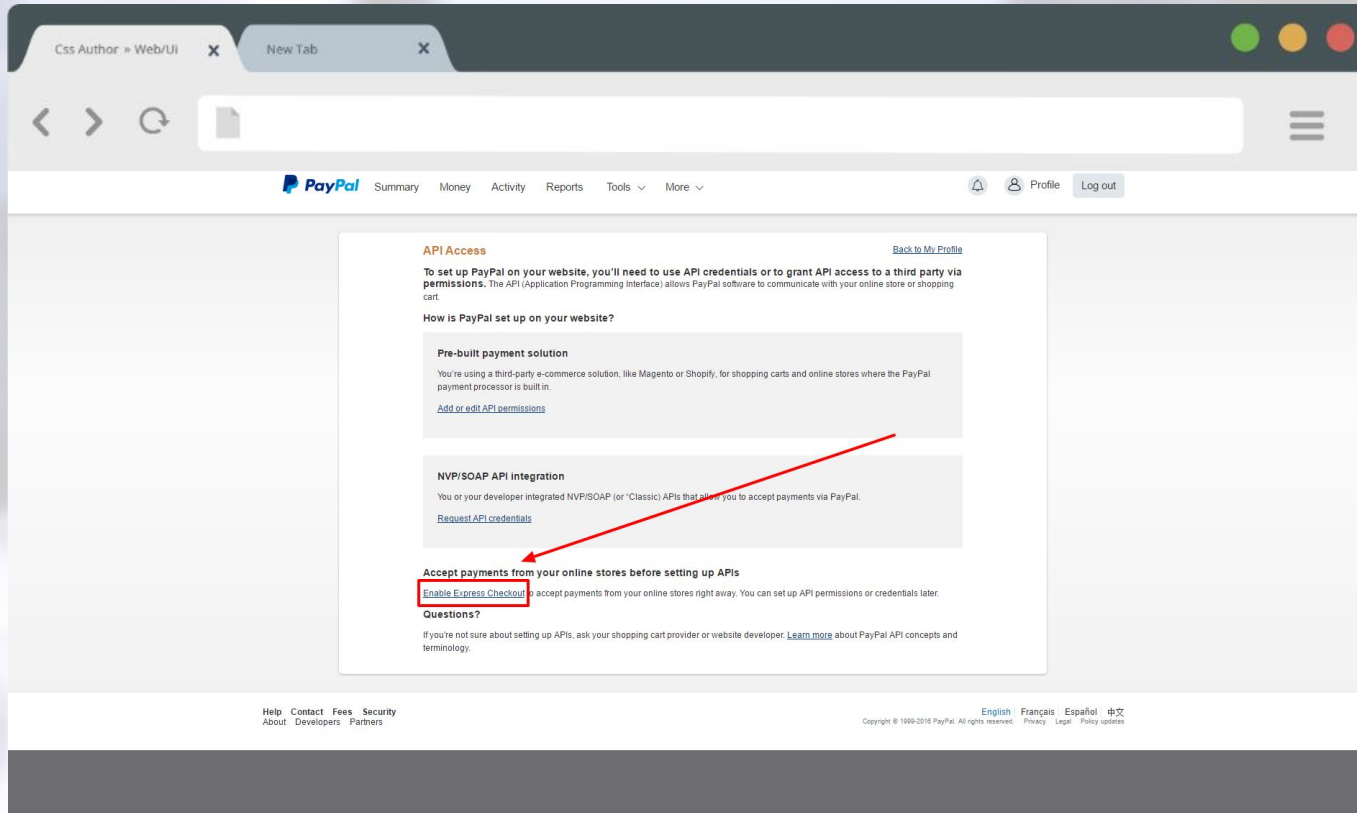
# PayPal: API Credentials

In the “On Your Website” section, click on “Option A”  
Next, click on where it says “Get your API Credentials”



# PayPal: API Credentials

Next, we will want to enable your account to accept payments  
Find where it says “Enable Express Checkout”  
Right click on this (ctrl+click on Mac) and “Open link in a new window



The screenshot shows a web browser window with two tabs: 'Css Author » Web/UI' and 'New Tab'. The address bar is empty. The PayPal website is displayed, featuring a navigation bar with the PayPal logo, links for Summary, Money, Activity, Reports, Tools, and More, and a user profile section with a bell icon, a profile icon, and a 'Log out' button. The main content area is titled 'API Access' and includes a link to 'Back to My Profile'. It explains that API credentials are needed for third-party access and provides instructions on how to set up PayPal on a website. Two main options are listed: 'Pre-built payment solution' and 'NVP/SOAP API integration'. A red arrow points from the 'NVP/SOAP API integration' section to the 'Enable Express Checkout' link in the 'Accept payments from your online stores before setting up APIs' section. The footer contains links for Help, Contact, Fees, Security, About, Developers, and Partners, as well as language options (English, Français, Español, 中文) and copyright information.

**API Access** [Back to My Profile](#)

To set up PayPal on your website, you'll need to use API credentials or to grant API access to a third party via permissions. The API (Application Programming Interface) allows PayPal software to communicate with your online store or shopping cart.

**How is PayPal set up on your website?**

**Pre-built payment solution**  
You're using a third-party e-commerce solution, like Magento or Shopify, for shopping carts and online stores where the PayPal payment processor is built in.  
[Add or edit API permissions](#)

**NVP/SOAP API integration**  
You or your developer integrated NVP/SOAP (or "Classic") APIs that allow you to accept payments via PayPal.  
[Request API credentials](#)

**Accept payments from your online stores before setting up APIs**  
[Enable Express Checkout](#) to accept payments from your online stores right away. You can set up API permissions or credentials later.

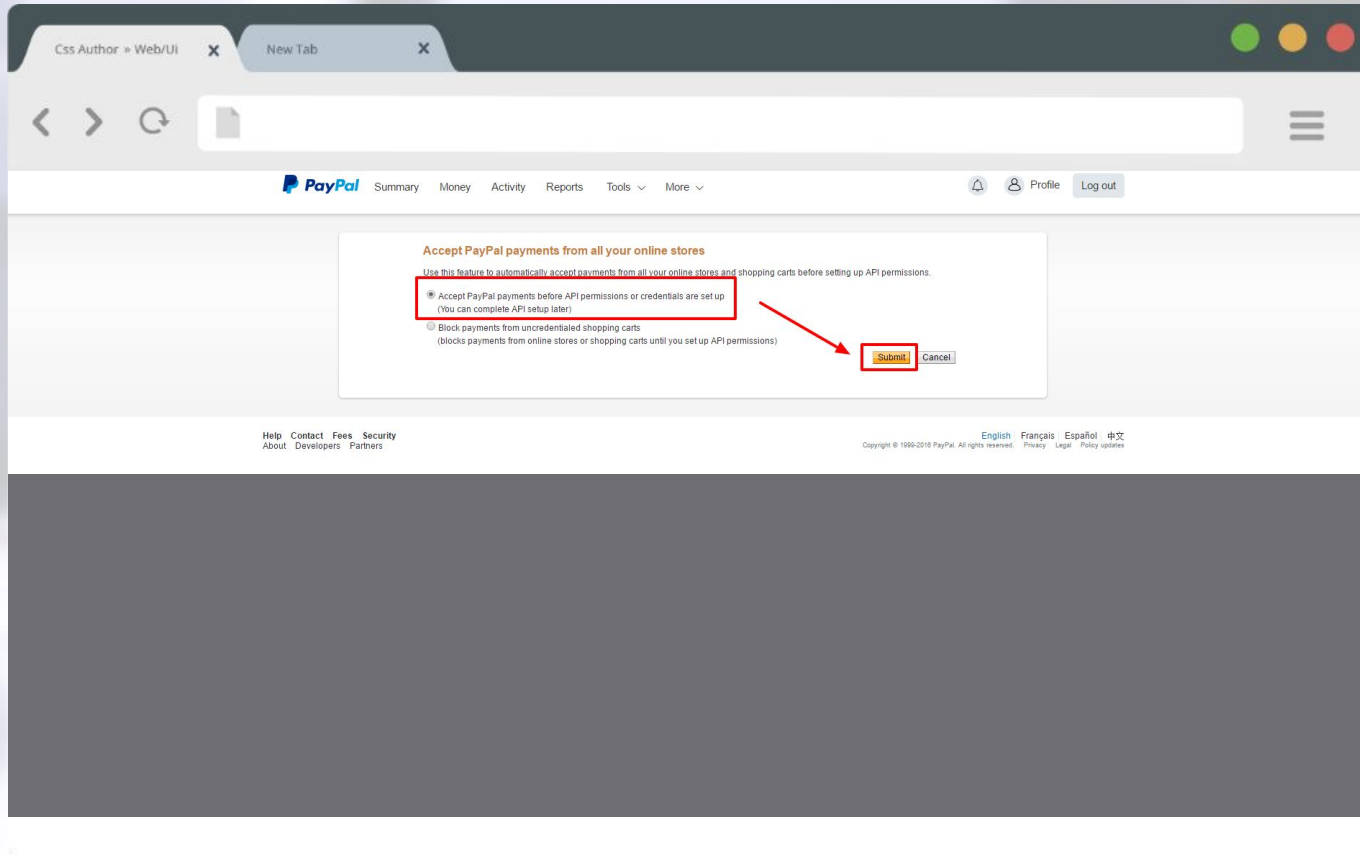
**Questions?**  
If you're not sure about setting up APIs, ask your shopping cart provider or website developer. [Learn more](#) about PayPal API concepts and terminology.

Help Contact Fees Security  
About Developers Partners

English Français Español 中文  
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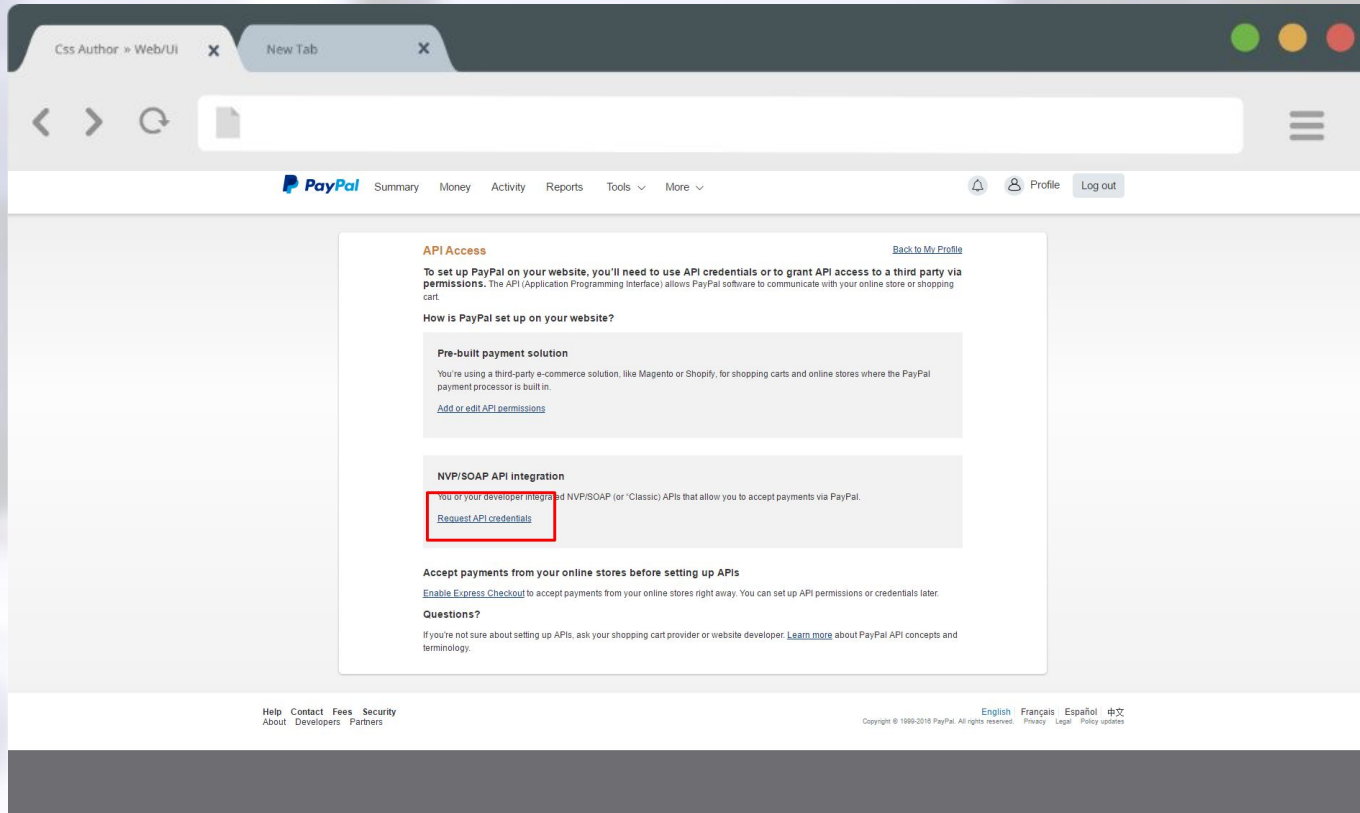
# PayPal: API Credentials

Make sure that the “Accept Paypal payments” box is checked  
Next, click on the “Agree and Submit” button  
After it submits, you can now close this tab/window



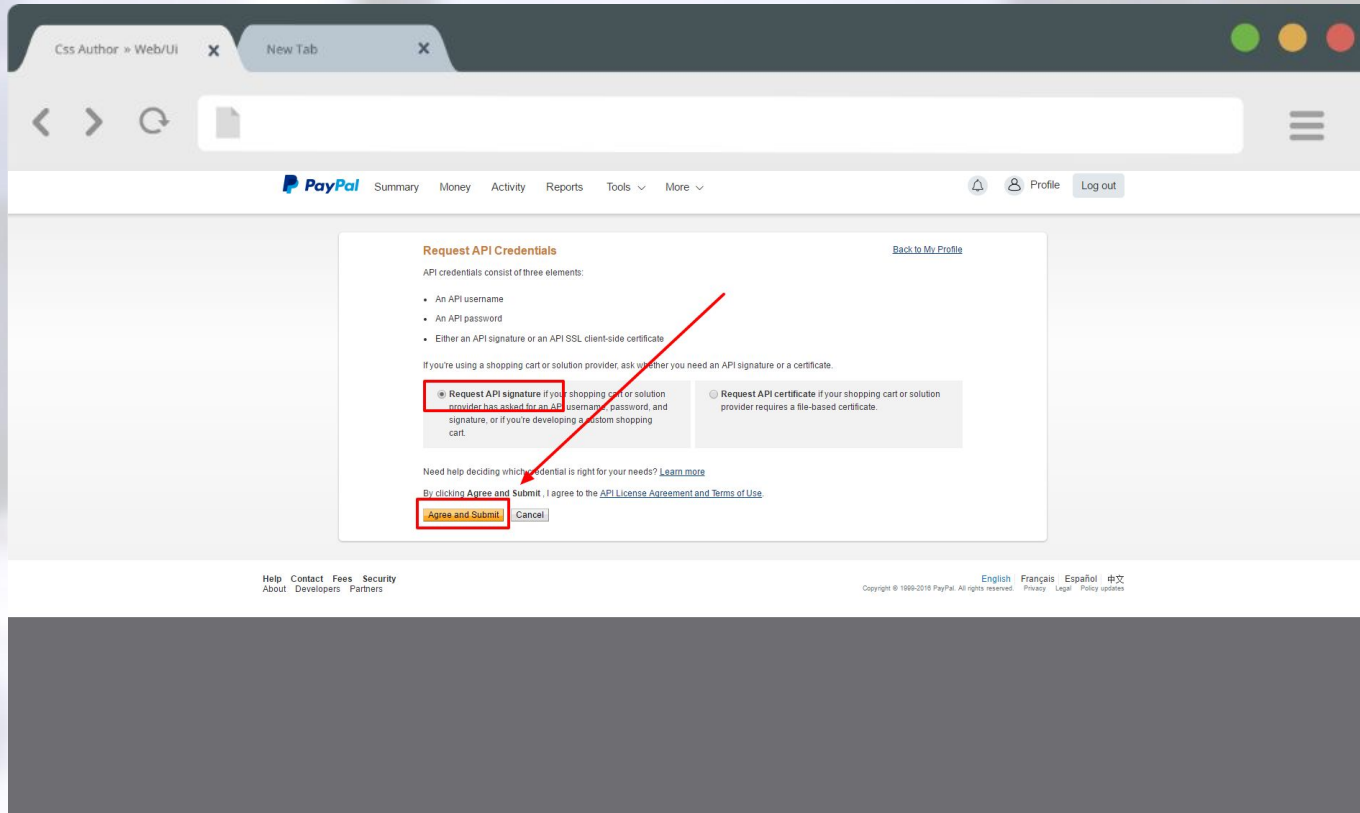
# PayPal: API Credentials

Next, click on the link that says “Request API credentials”



# PayPal: API Credentials

Make sure that the “Request API signature box is checked”  
Next, click on the “Agree and Submit” button  
After it submits, you can now close this tab/window



The screenshot shows a web browser window with two tabs: 'Css Author » Web/UI' and 'New Tab'. The address bar is empty. The PayPal logo and navigation links (Summary, Money, Activity, Reports, Tools, More) are visible at the top. The main content area is titled 'Request API Credentials' and includes a 'Back to My Profile' link. It lists the elements of API credentials: an API username, an API password, and either an API signature or an API SSL client-side certificate. Two radio buttons are present: 'Request API signature' (selected) and 'Request API certificate'. A red box highlights the 'Request API signature' option, and a red arrow points to it from the text 'Request API signature box is checked'. Another red box highlights the 'Agree and Submit' button, and a red arrow points to it from the text 'click on the “Agree and Submit” button'. The footer contains links for Help, Contact, Fees, Security, About, Developers, and Partners, along with copyright information and language options.

**Request API Credentials** [Back to My Profile](#)

API credentials consist of three elements:

- An API username
- An API password
- Either an API signature or an API SSL client-side certificate

If you're using a shopping cart or solution provider, ask whether you need an API signature or a certificate.

☒ **Request API signature** if your shopping cart or solution provider has asked for an API username, password, and signature, or if you're developing a custom shopping cart.

☐ **Request API certificate** if your shopping cart or solution provider requires a file-based certificate.

Need help deciding which credential is right for your needs? [Learn more](#)

By clicking **Agree and Submit**, I agree to the [API License Agreement and Terms of Use](#).

**Agree and Submit** [Cancel](#)

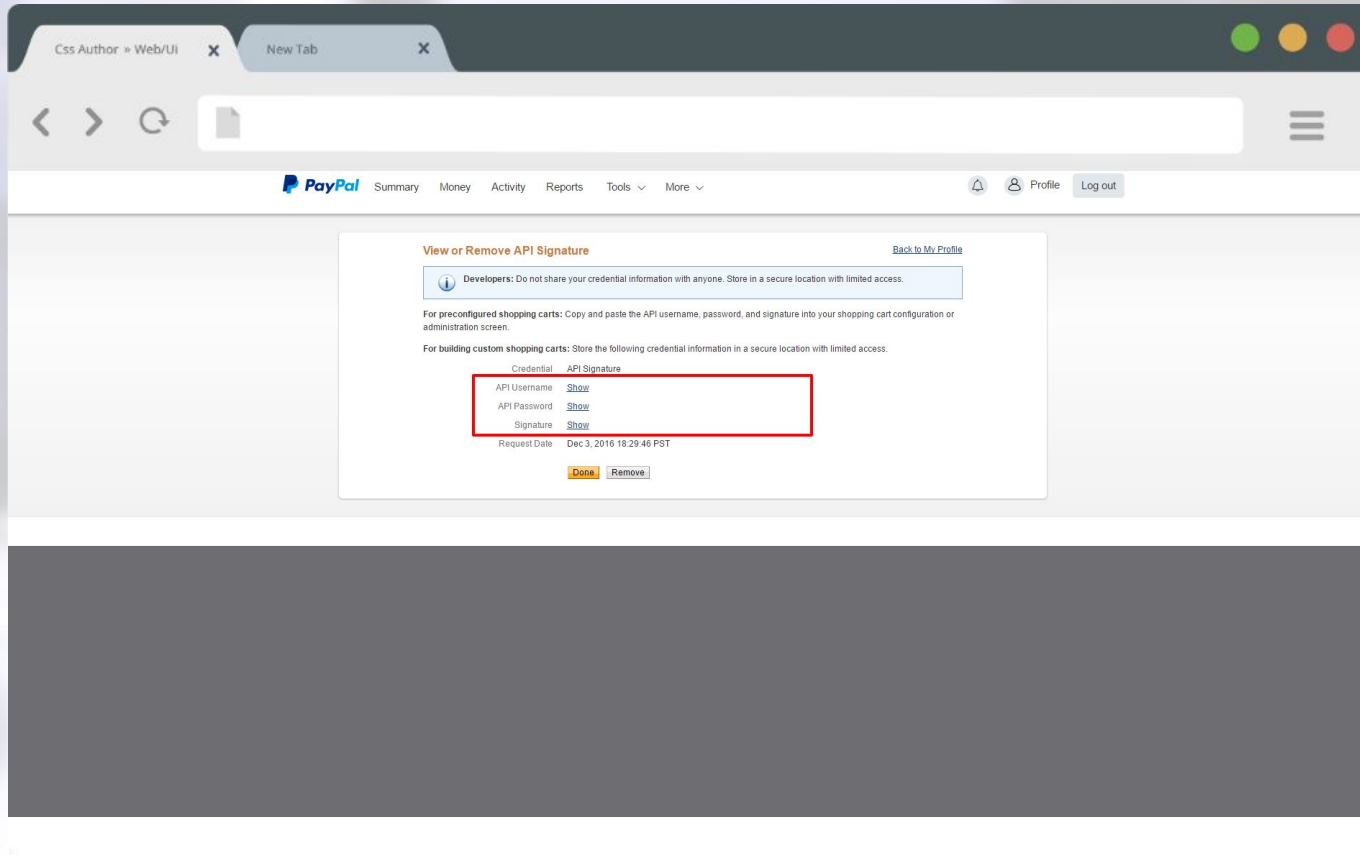
Help Contact Fees Security  
About Developers Partners

English Français Español 中文  
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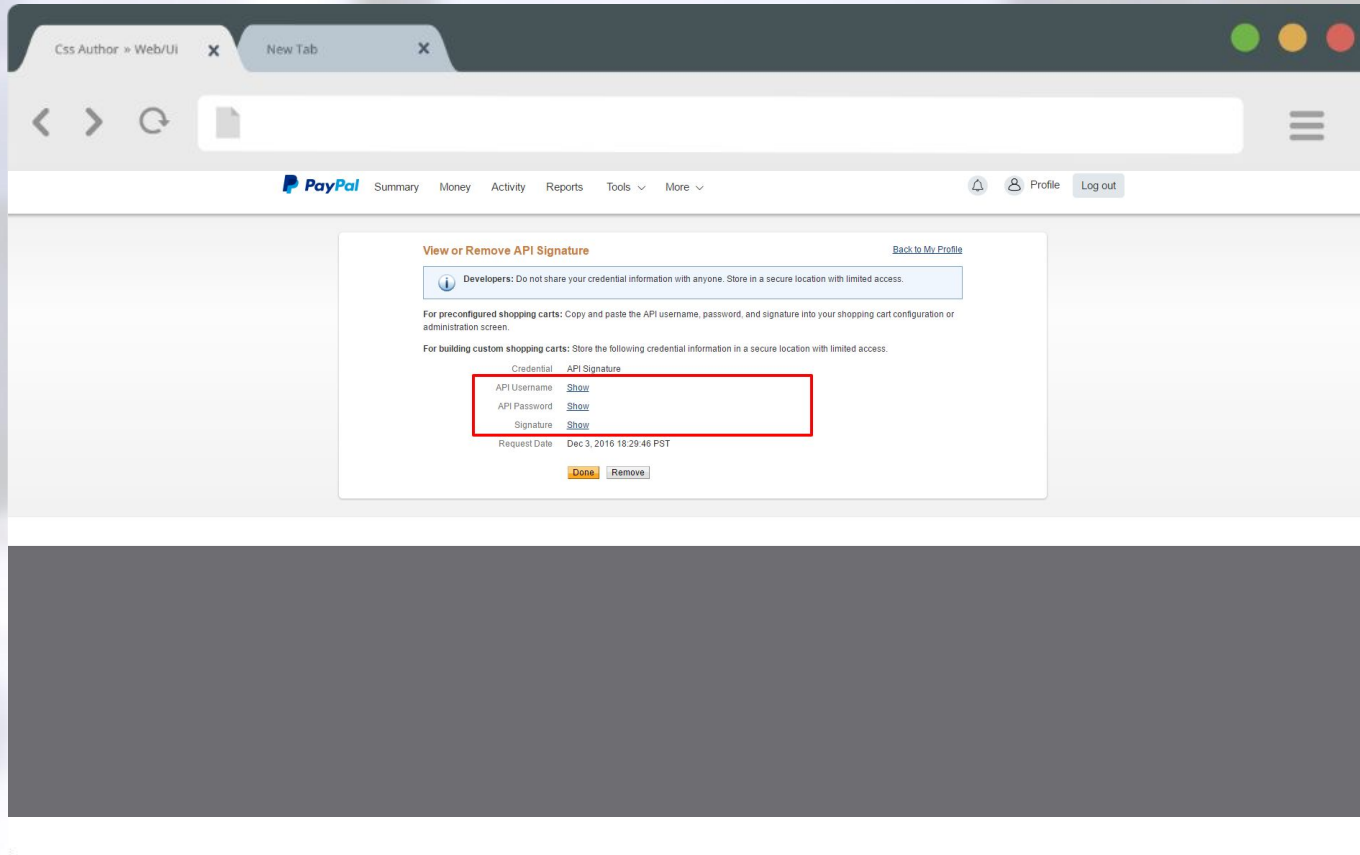
# PayPal: API Credentials

Once you are on this page, go ahead and click the three “Show” buttons  
This will reveal your API Username, Password, and Signature  
You will want to copy these one at a time and paste them into your website



# PayPal: API Credentials

Once you are on this page, go ahead and click the three “Show” buttons  
This will reveal your API Username, Password, and Signature  
You will want to copy these one at a time and paste them into your website



# PayPal: API Credentials

Again, this is where you'll want to paste the API information from PayPal  
Once that is all pasted in your CoachLeads website, click on "Save Settings"

The screenshot shows the CoachLeads website interface. The top navigation bar includes links for Appointments, Services, Providers, Settings, Payments, Clients, and Export. The left sidebar contains a menu with options like Dashboard, Appointments, Autoresponder, Appearance, Blog Posts, Pages, Comments, My Clients, Smart Optin Box, Media, Announcements, and Collapse menu. The main content area is titled "Payment Gateways" and features a "Disable All Payment Gateways" button. Below this, there are sections for "Pay locally", "Paypal Express Checkout", "Paypal guest payment", and "Stripe Payment Form". The "Paypal Express Checkout" section is highlighted with a red box, containing fields for "API Username", "API Password", and "Signature", each with a "Disable" button and a help icon. The "Paypal guest payment" section has an "Enable" button and a "Test Mode" toggle. The "Stripe Payment Form" section has a "Disable" button and fields for "Secret Key" and "Publishable Key". A red arrow points from the "Paypal Express Checkout" section to the "Save Settings" button at the bottom, which is also highlighted with a red box.

CoachLeads Stephen Soto Training

Appointments Services Providers Settings Payments Clients Export

General  
Customize Look  
Payment  
Email  
Email Templates  
Reminder SMS  
Discount Coupons  
Labels  
Form Fields  
Social Login

Payment Gateways

Disable All Payment Gateways No

Pay locally Disable

Paypal Express Checkout Enable

API Username  
API Password  
Signature

Paypal guest payment Enable

Test Mode Disable

Stripe Payment Form Disable

Secret Key  
Publishable Key

Save Settings

SETTINGS

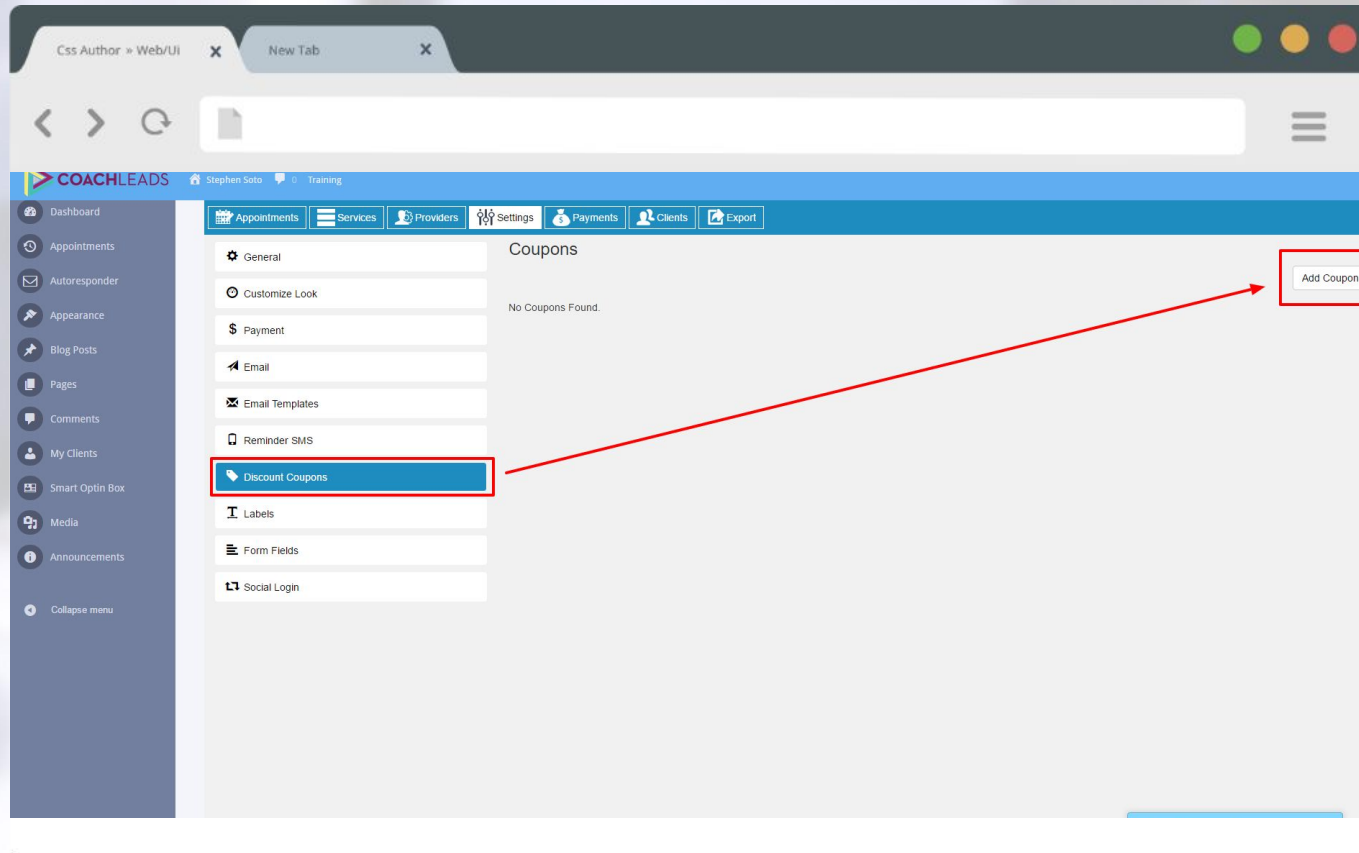
# DISCOUNT COUPONS

discount coupons will allow you to  
give your clients a coupon code to enter  
during checkout to get a discount



# General: Discount Coupons

Here you will be able to add coupons to your website  
Once you are on this screen, click “Add Coupon” in the upper right hand corner



# General: Discount Coupons

The Coupon Code is the code people will enter during checkout  
Value is the percentage or flat rate discount they will receive  
You can also set a usage limit and expiration date

The screenshot shows a web browser window with two tabs: 'Css Author » Web/UI' and 'New Tab'. The browser's address bar is empty. Below the browser window is the COACHLEADS application interface. The top navigation bar includes the COACHLEADS logo, a user profile icon for 'Stephen Soto', and a 'Training' link. A secondary navigation bar contains icons for 'Appointments', 'Services', 'Providers', 'Settings', 'Payments', 'Clients', and 'Export'. On the left, a sidebar menu lists various application features: Dashboard, Appointments, Autoresponder, Appearance, Blog Posts, Pages, Comments, My Clients, Smart Optin Box, Media, Announcements, and Collapse menu. The main content area is titled 'Create Coupon' and contains a form with the following fields: 'Coupon Code' (text input with value 'yourcode'), 'Coupon Type' (dropdown menu set to 'Percentage'), 'Value' (text input with value '50'), 'Limit' (text input with value '10'), and 'Expiry Date' (calendar icon and text input with value '06/01/2022'). A 'Generate Coupon' button is located at the bottom of the form. To the left of the form is a vertical list of settings categories: General, Customize Look, Payment, Email, Email Templates, Reminder SMS, Discount Coupons (highlighted in blue), Labels, Form Fields, and Social Login.

# General: Discount Coupons

The Coupon Code is the code people will enter during checkout  
Value is the percentage or flat rate discount they will receive  
You can also set a usage limit and expiration date

The screenshot shows a web browser window with two tabs: 'Css Author » Web/UI' and 'New Tab'. The browser's address bar is empty. Below the browser window is the COACHLEADS application interface. The top navigation bar includes the COACHLEADS logo, a user profile icon for 'Stephen Soto', and a 'Training' link. A secondary navigation bar contains icons for 'Appointments', 'Services', 'Providers', 'Settings', 'Payments', 'Clients', and 'Export'. On the left, a sidebar menu lists various application features: Dashboard, Appointments, Autoresponder, Appearance, Blog Posts, Pages, Comments, My Clients, Smart Optin Box, Media, Announcements, and Collapse menu. The main content area is titled 'Create Coupon' and contains a form with the following fields: 'Coupon Code' (text input with value 'yourcode'), 'Coupon Type' (dropdown menu set to 'Percentage'), 'Value' (text input with value '50'), 'Limit' (text input with value '10'), and 'Expiry Date' (calendar icon and text input with value '06/01/2022'). A 'Generate Coupon' button is located at the bottom of the form. To the left of the form is a vertical list of settings categories: General, Customize Look, Payment, Email, Email Templates, Reminder SMS, Discount Coupons (highlighted in blue), Labels, Form Fields, and Social Login.

# That's It!

If you have any issues or further questions, please contact Live Chat Support

