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**

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

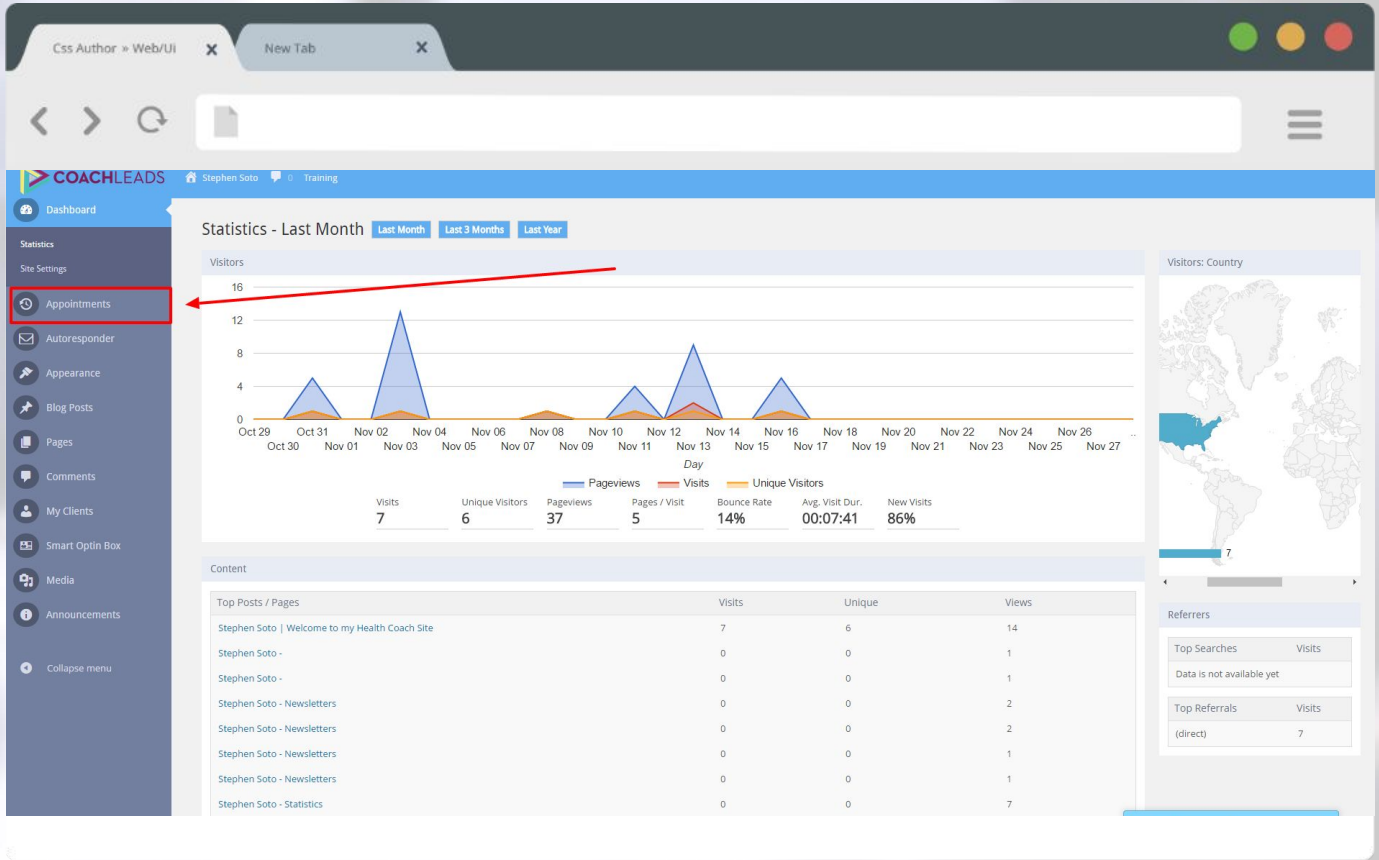
You are also able to integrate PayPal payments into your CoachLeads website.

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!

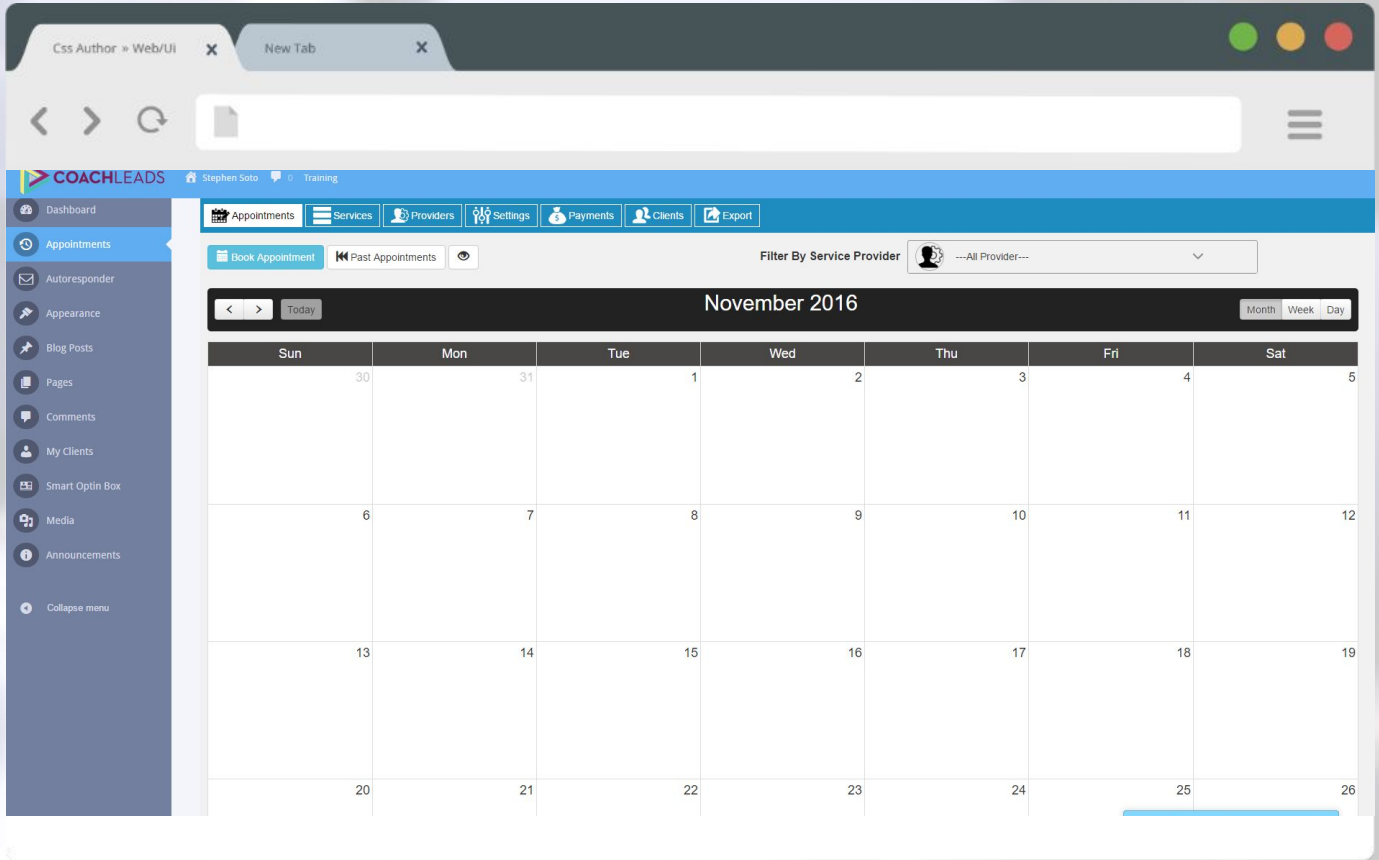
Accessing Your Appointments

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



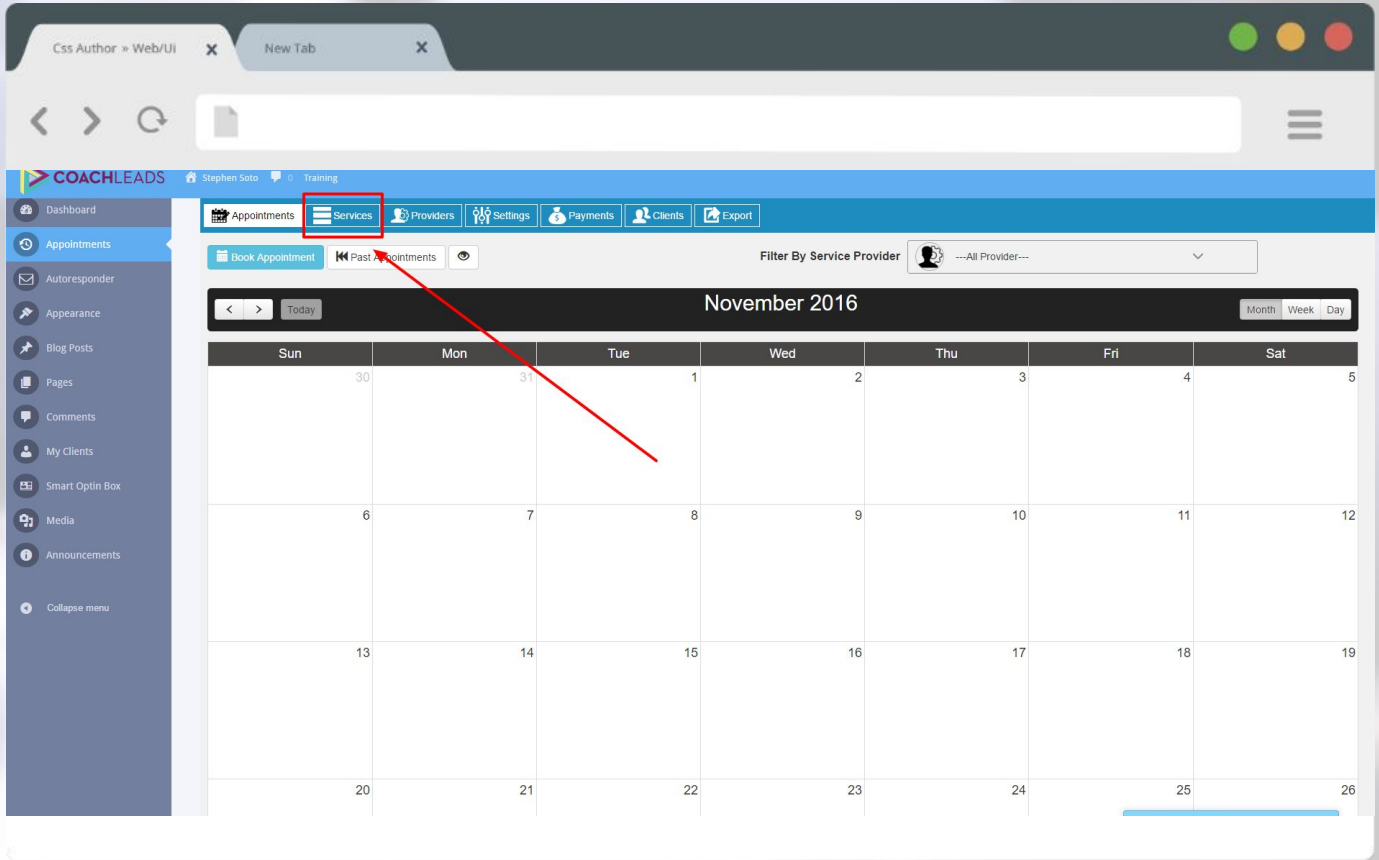
APPOINTMENT SOFTWARE

SERVICES

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

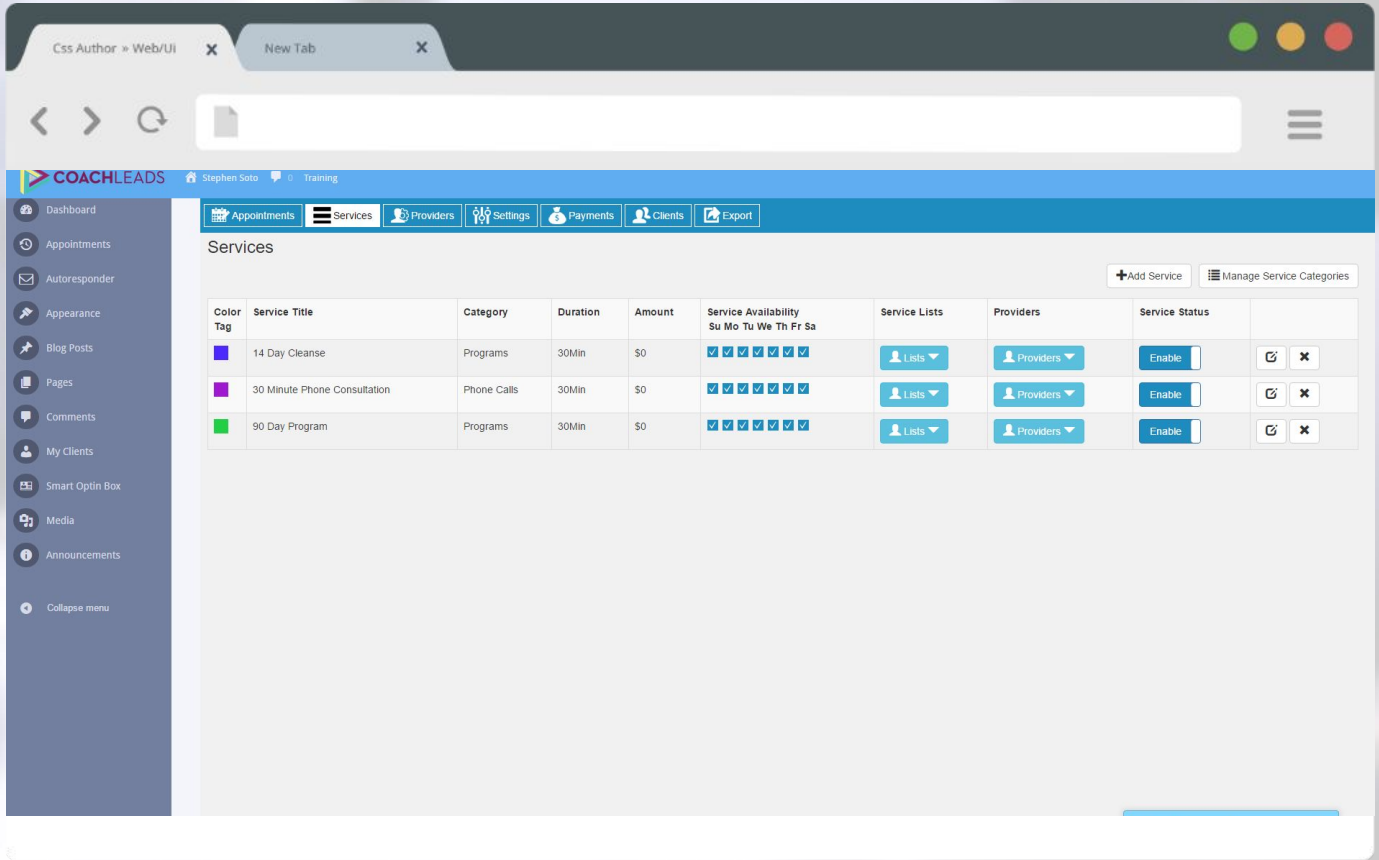
Accessing Your Services

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



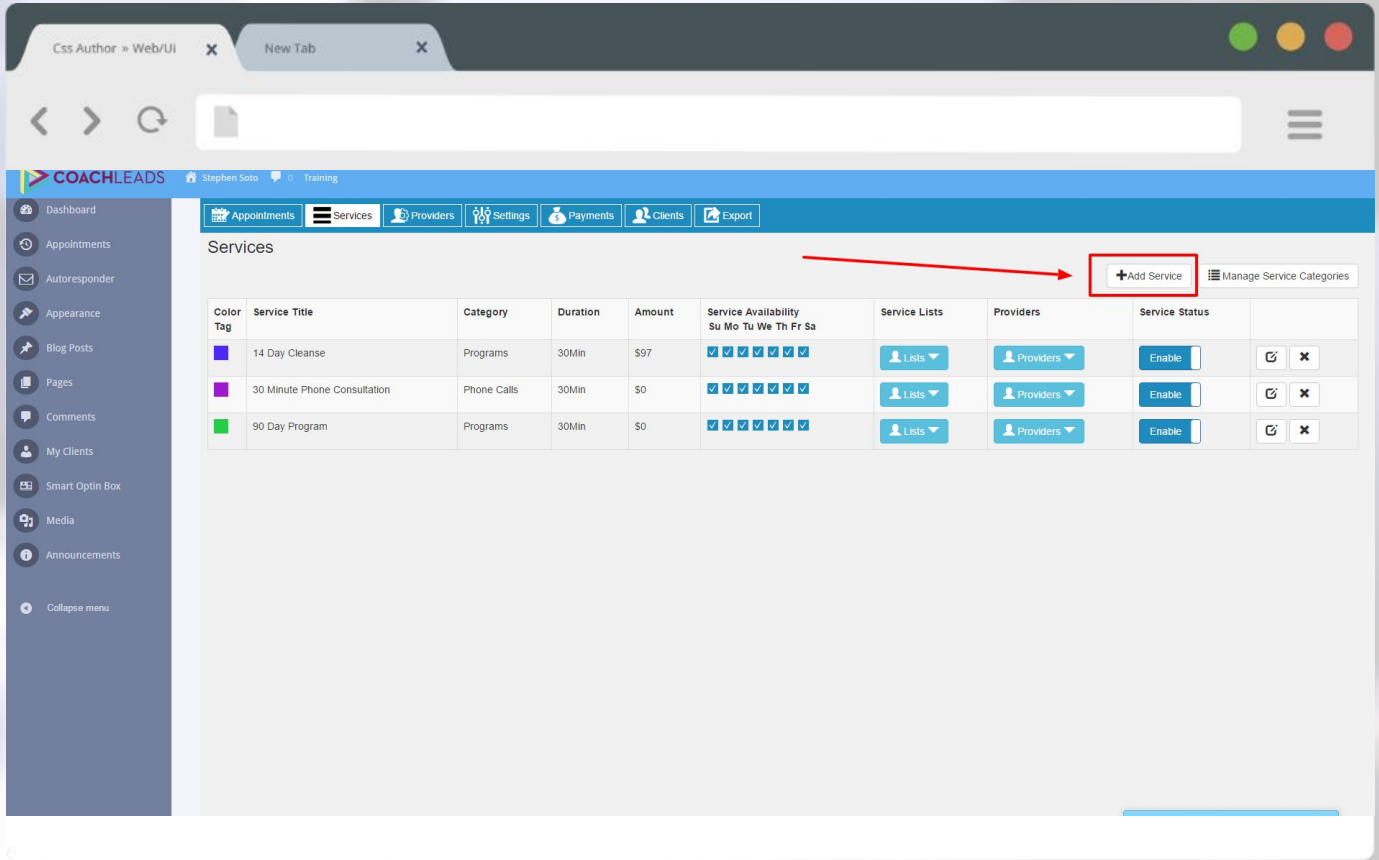
Your Services

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



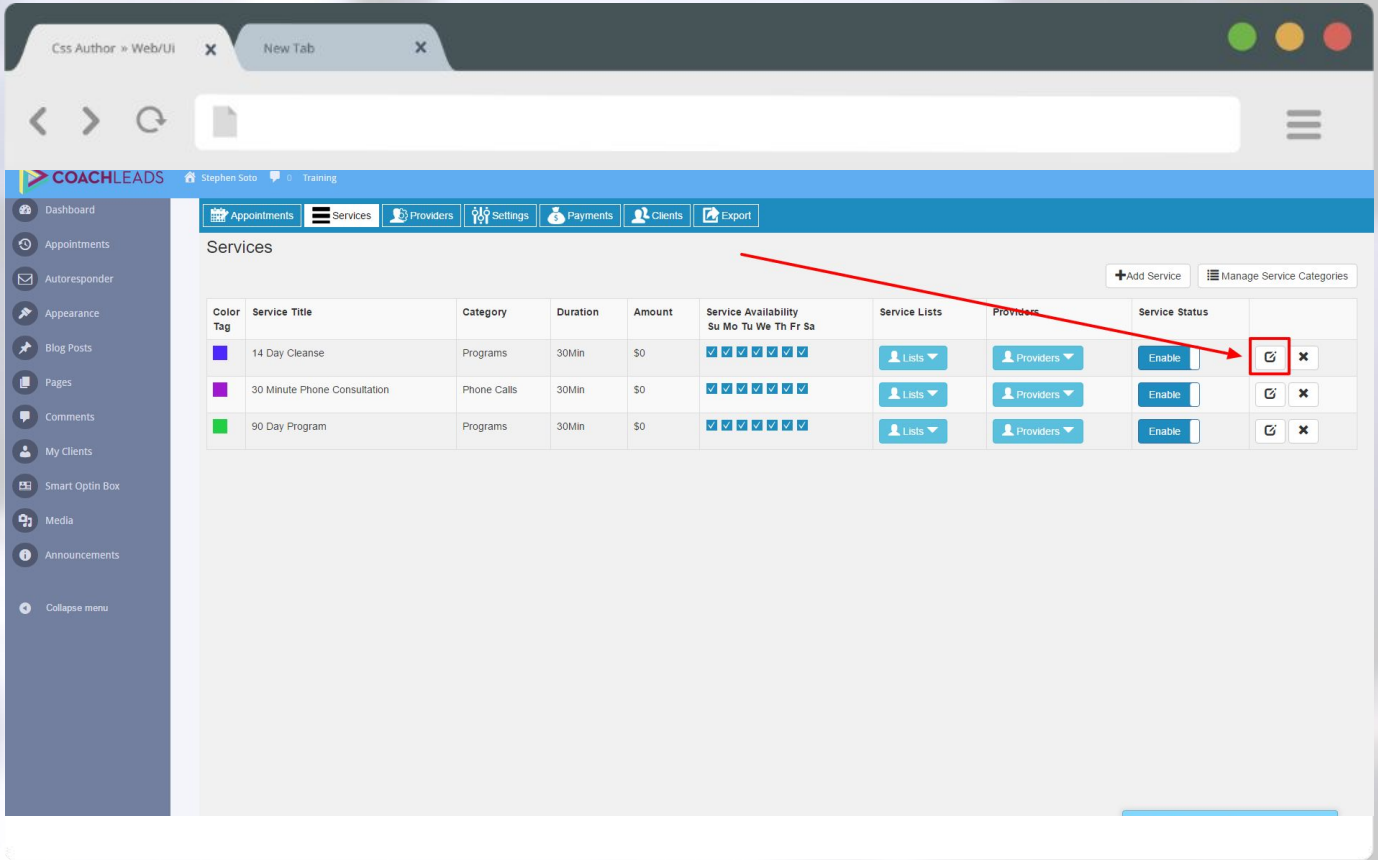
Adding a Service

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



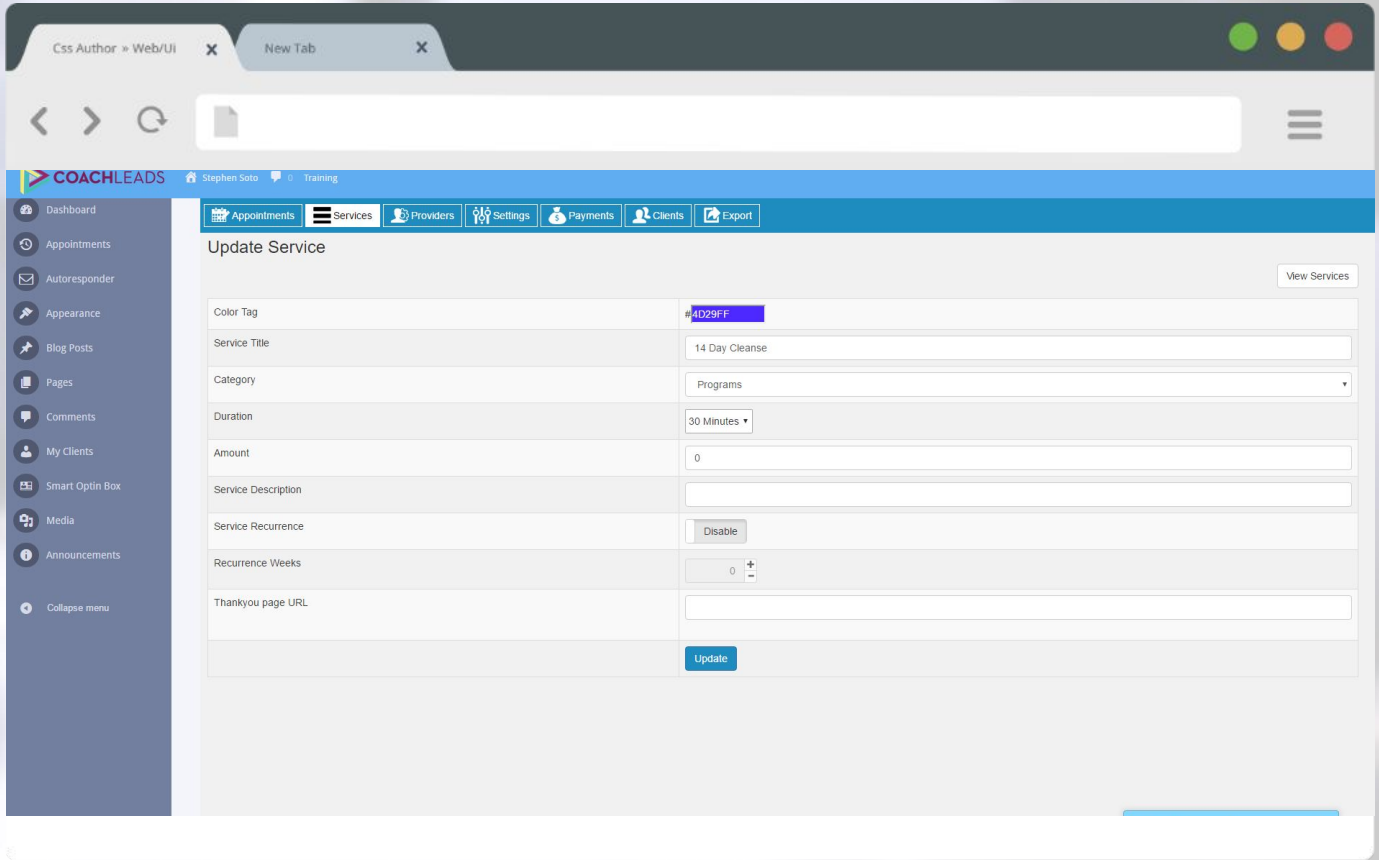
Editing Services

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



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



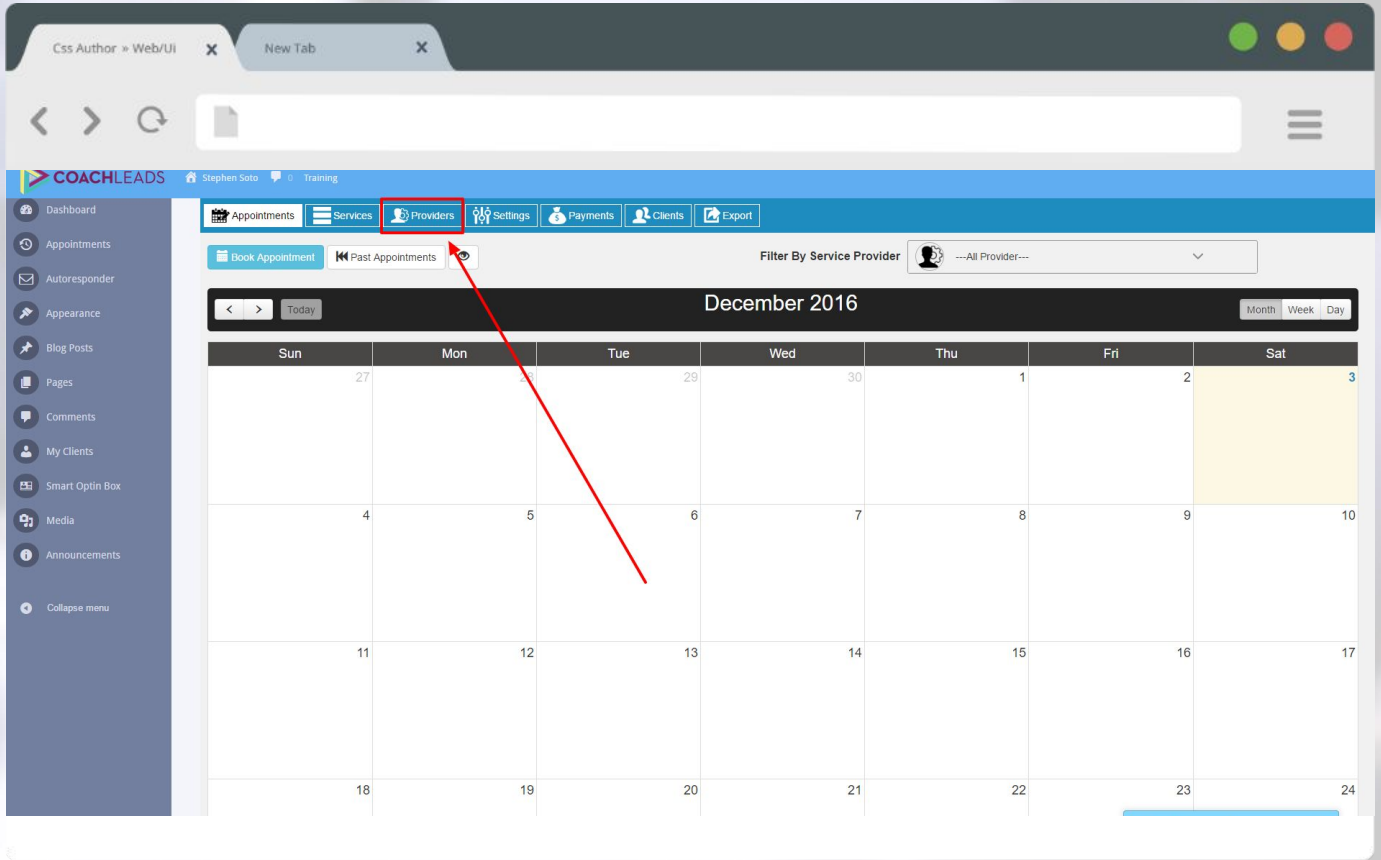
APPOINTMENT SOFTWARE

PROVIDERS

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

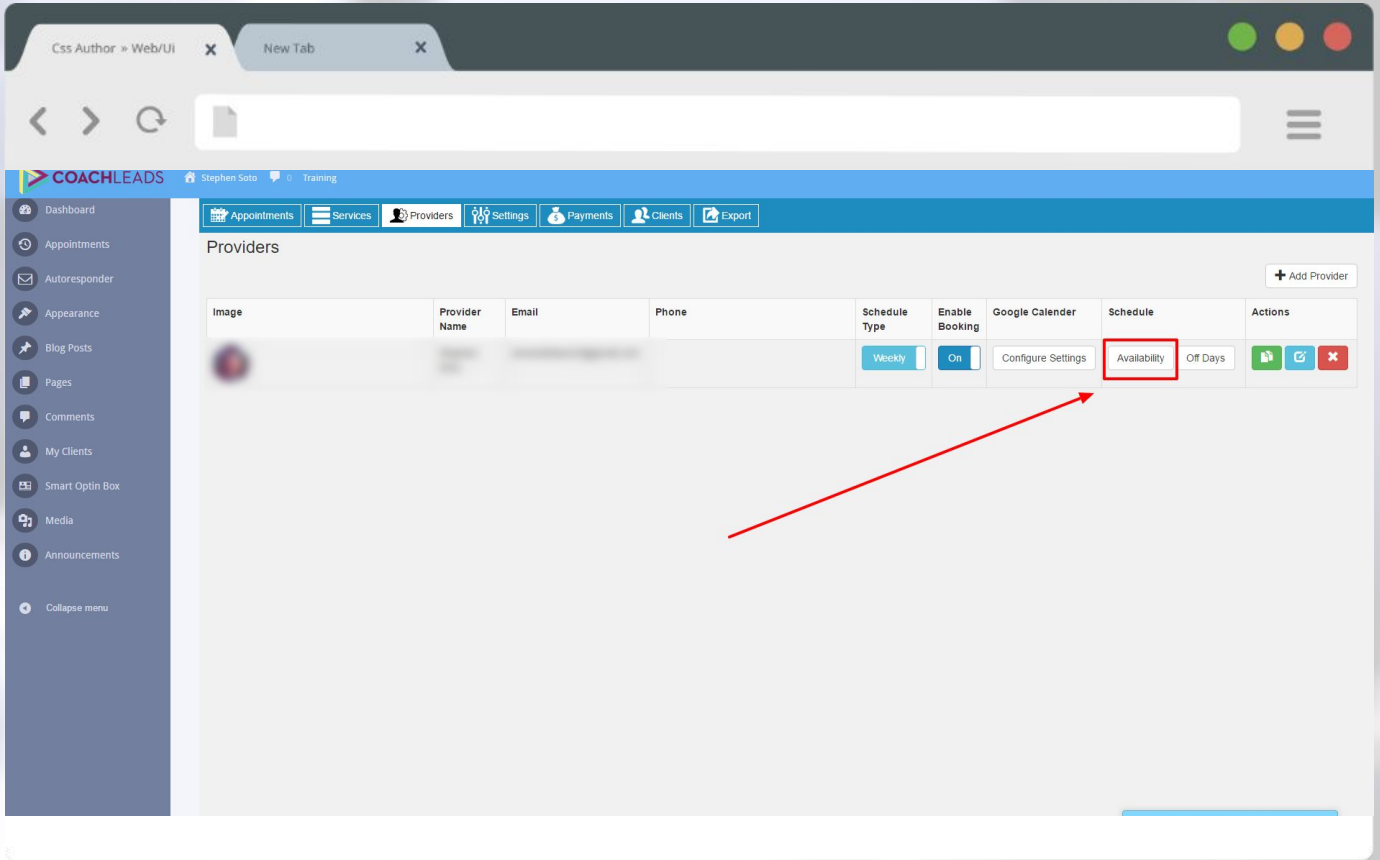
Accessing Your Schedule

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



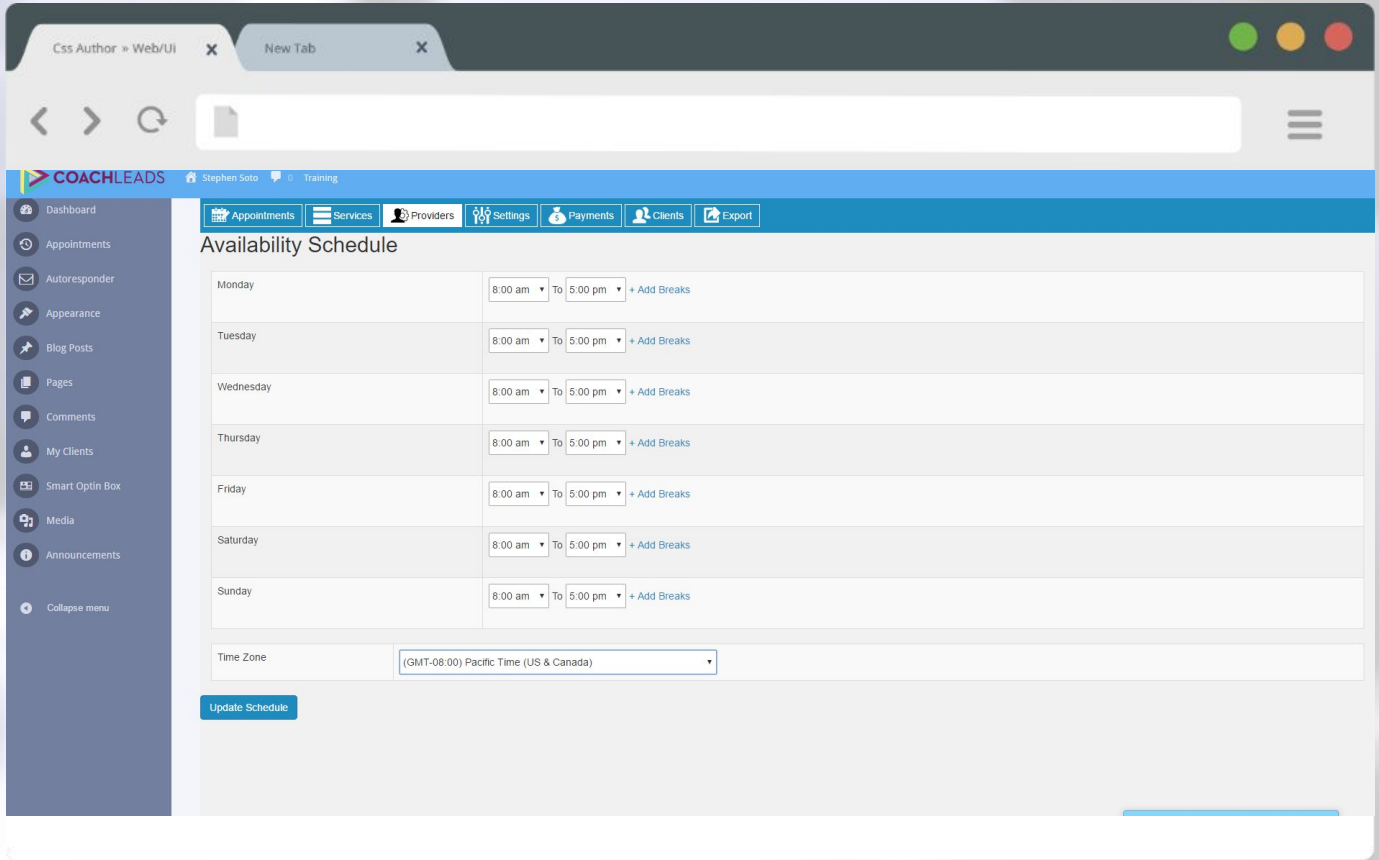
Accessing Your Schedule

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!



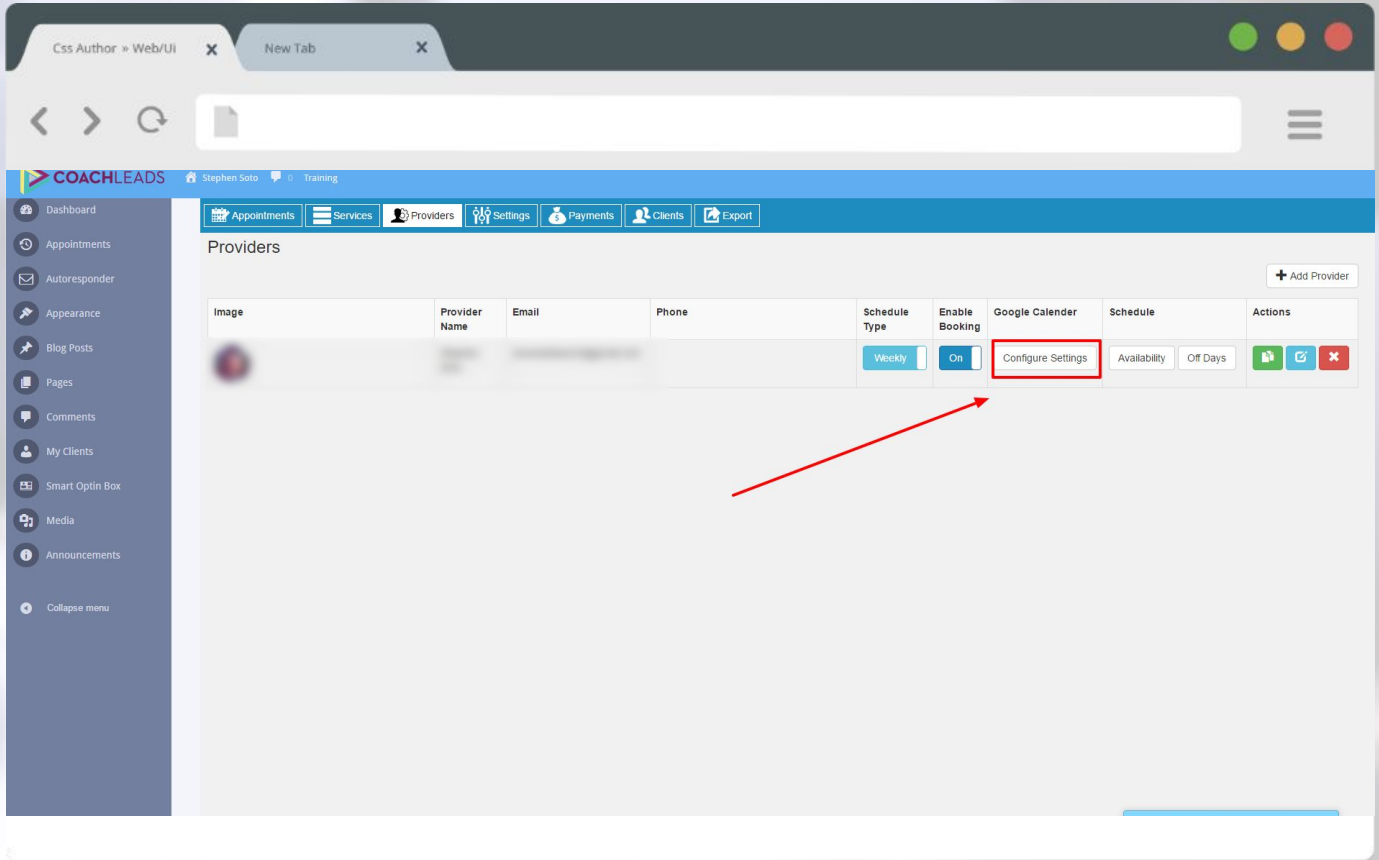
Editing Your Schedule

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



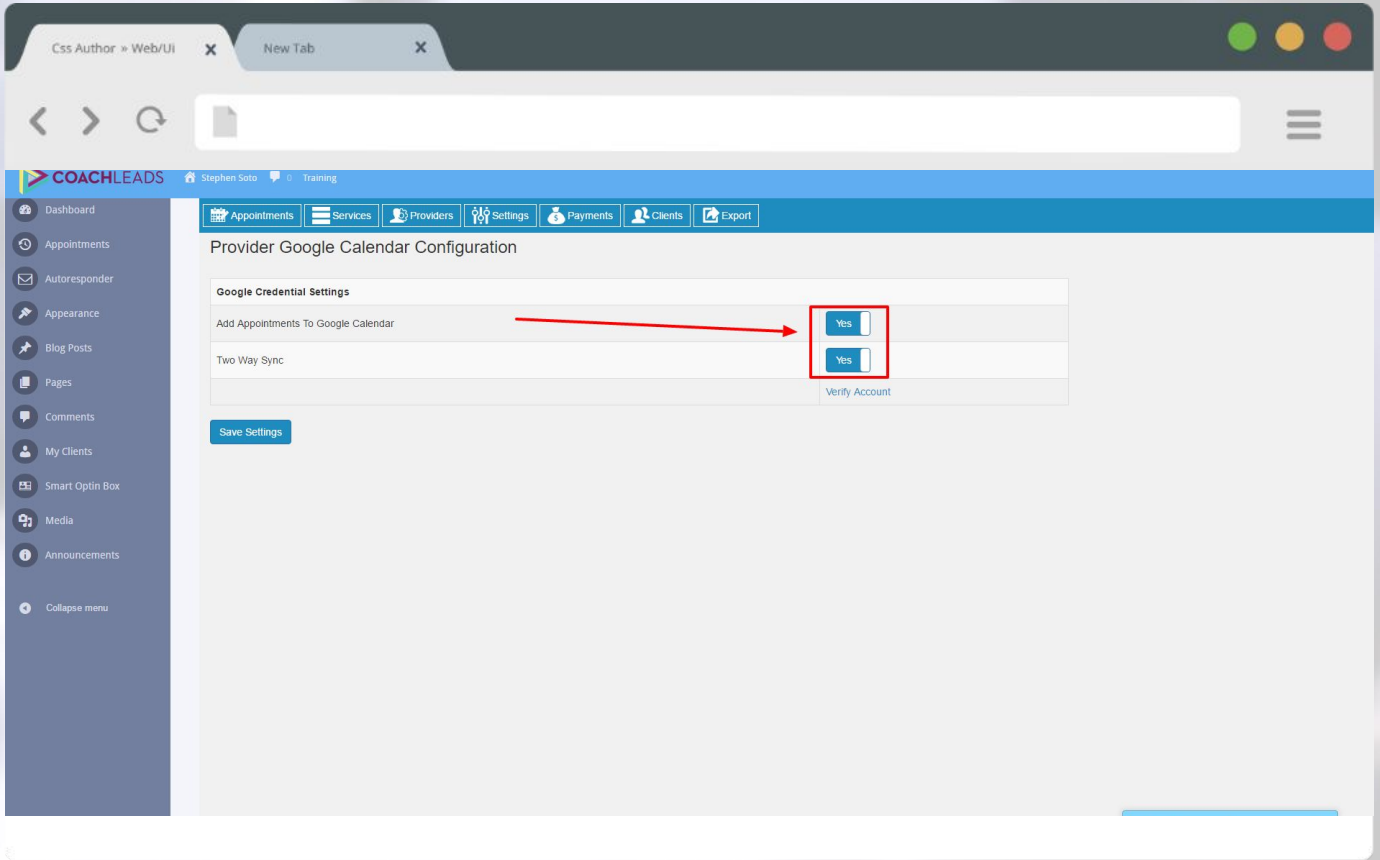
Integrating Google Calendar

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



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



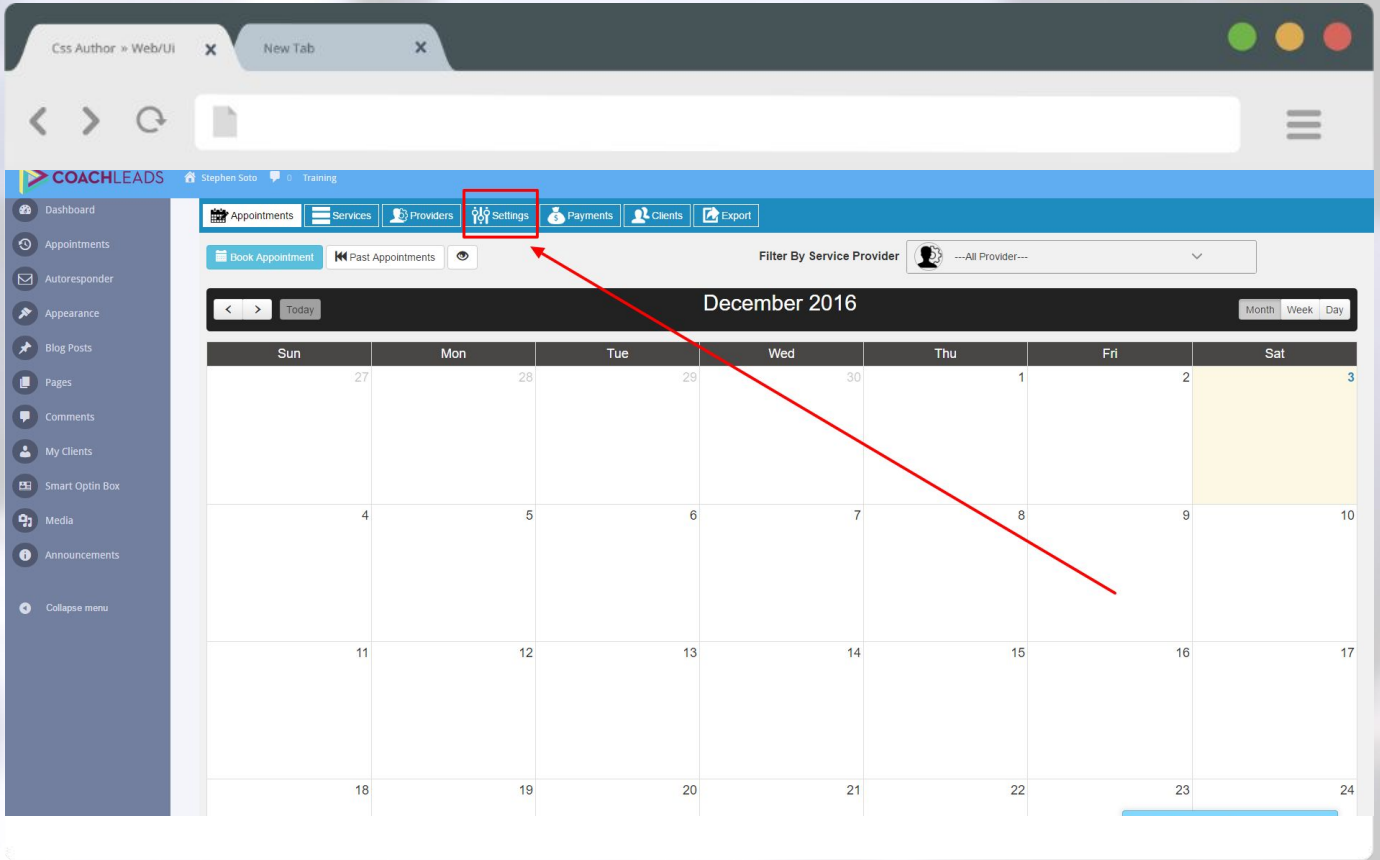
CHANGING YOUR

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)



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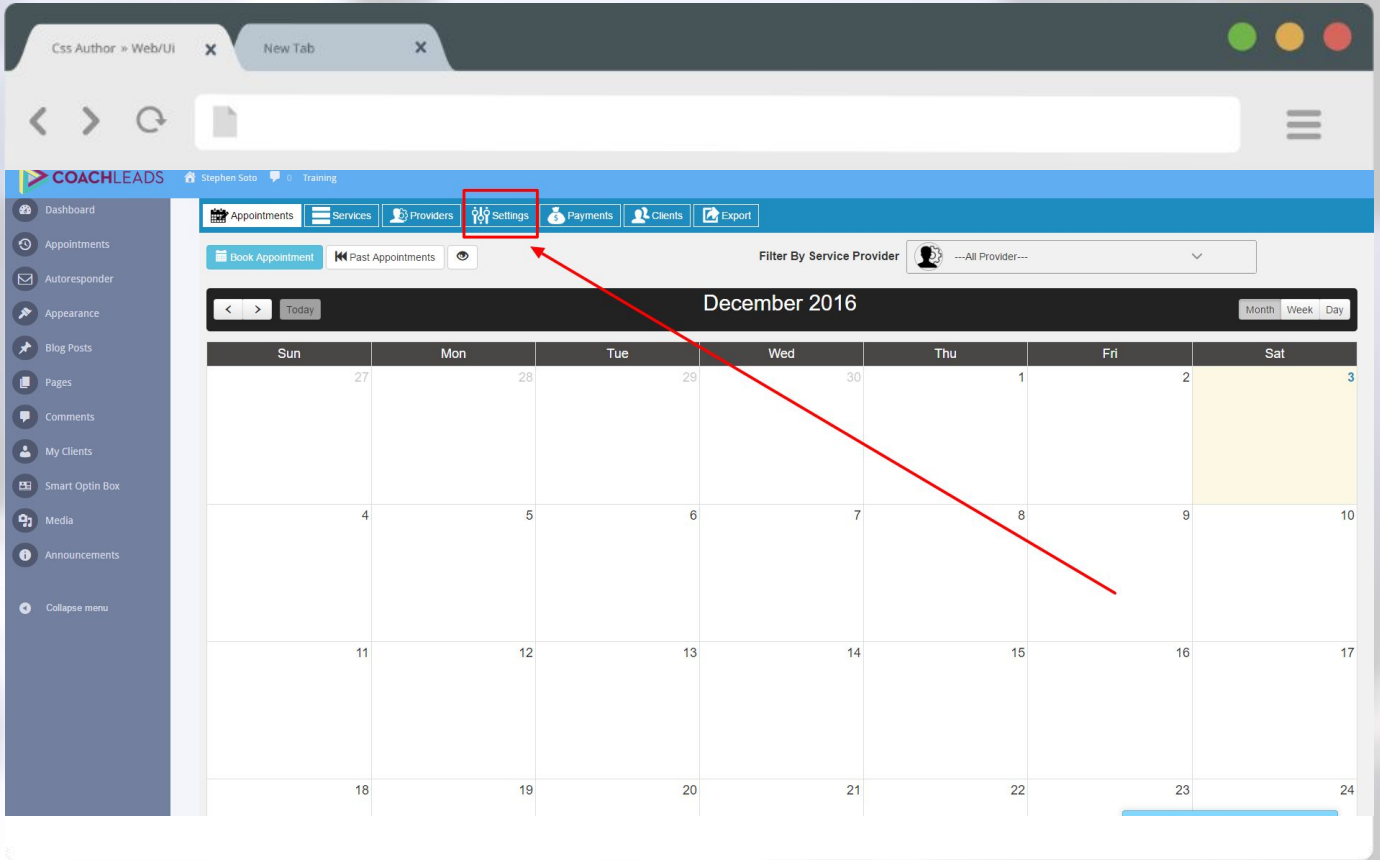


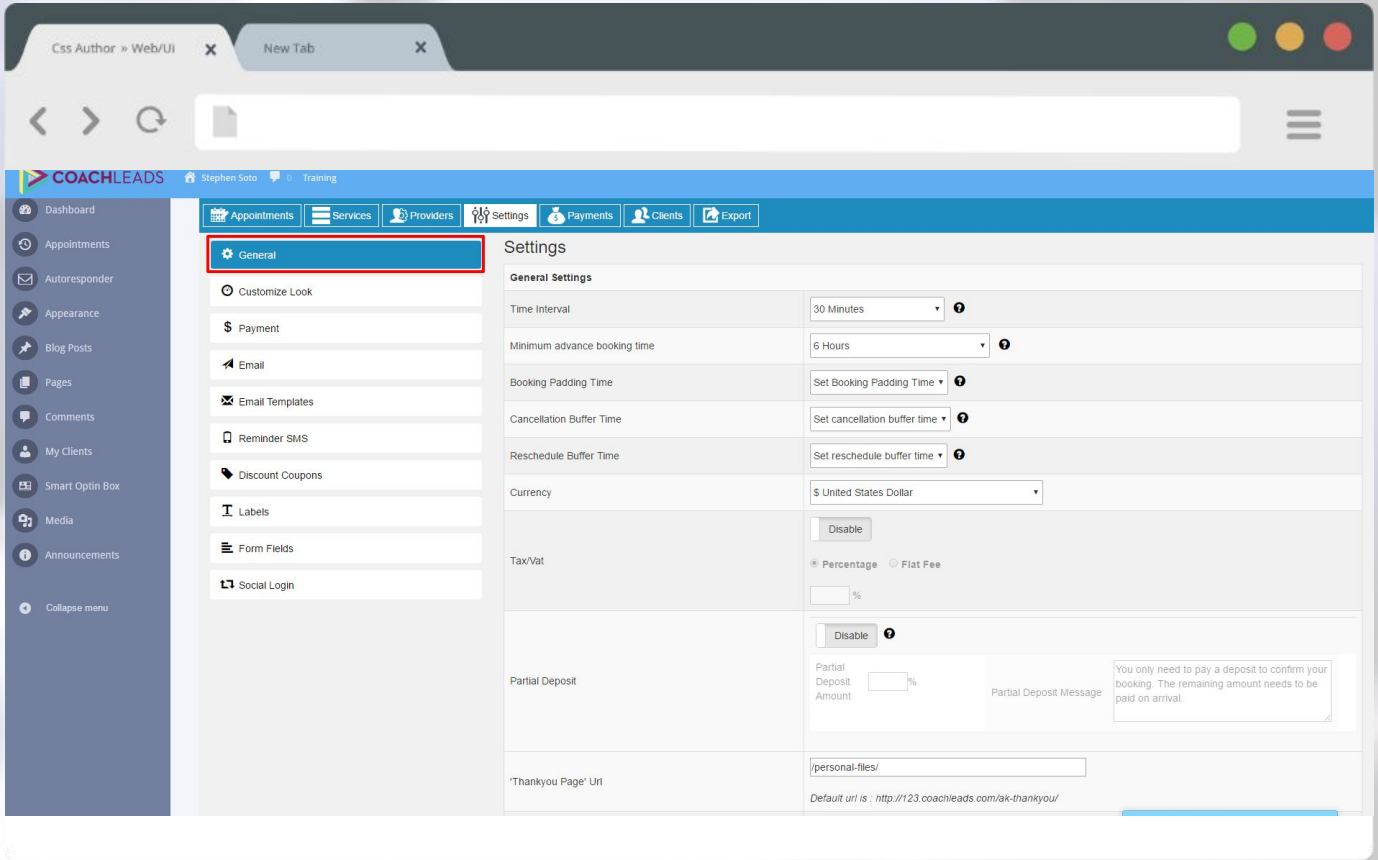
SETTINGS

GENERAL SETTINGS

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

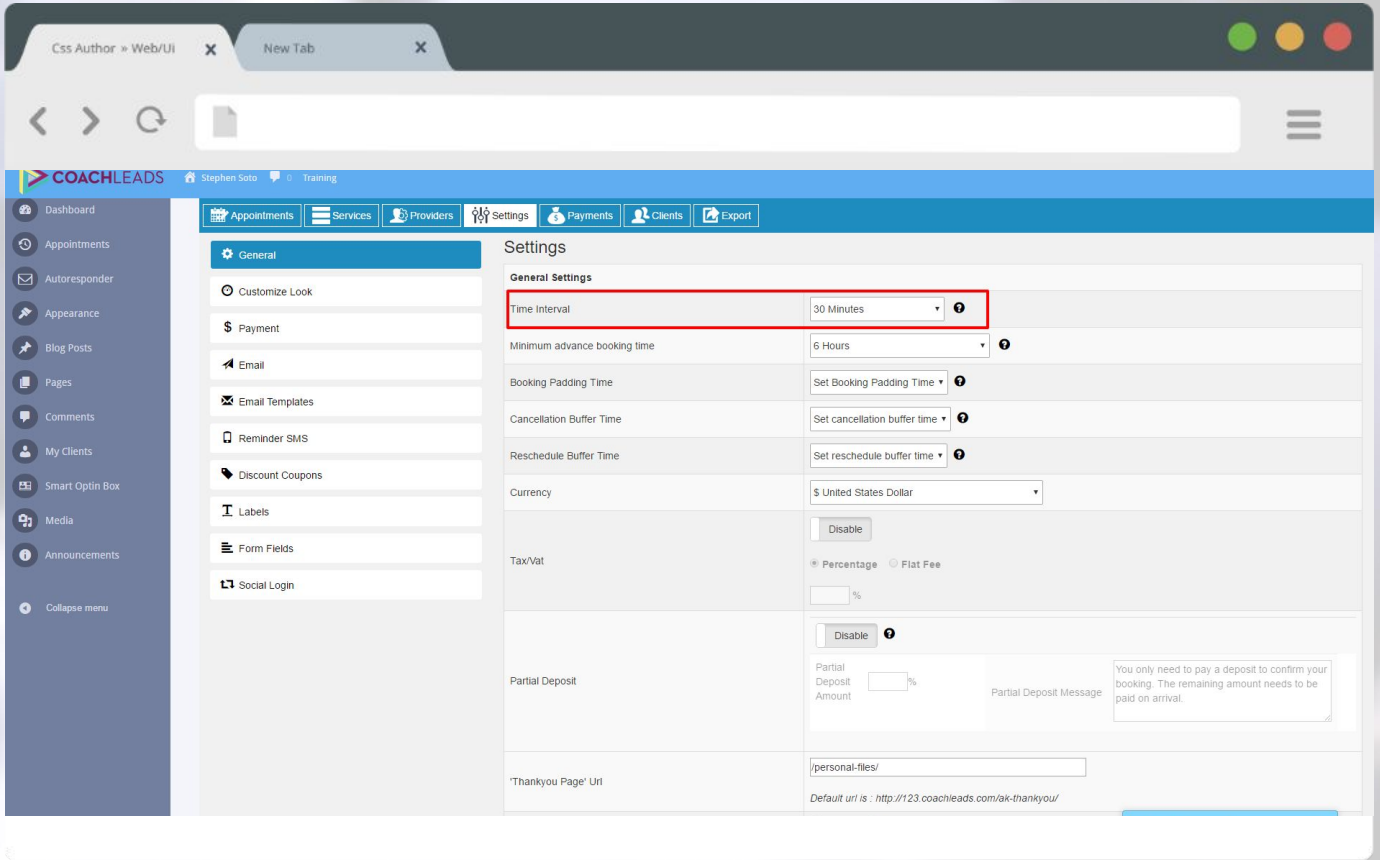
General Settings

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



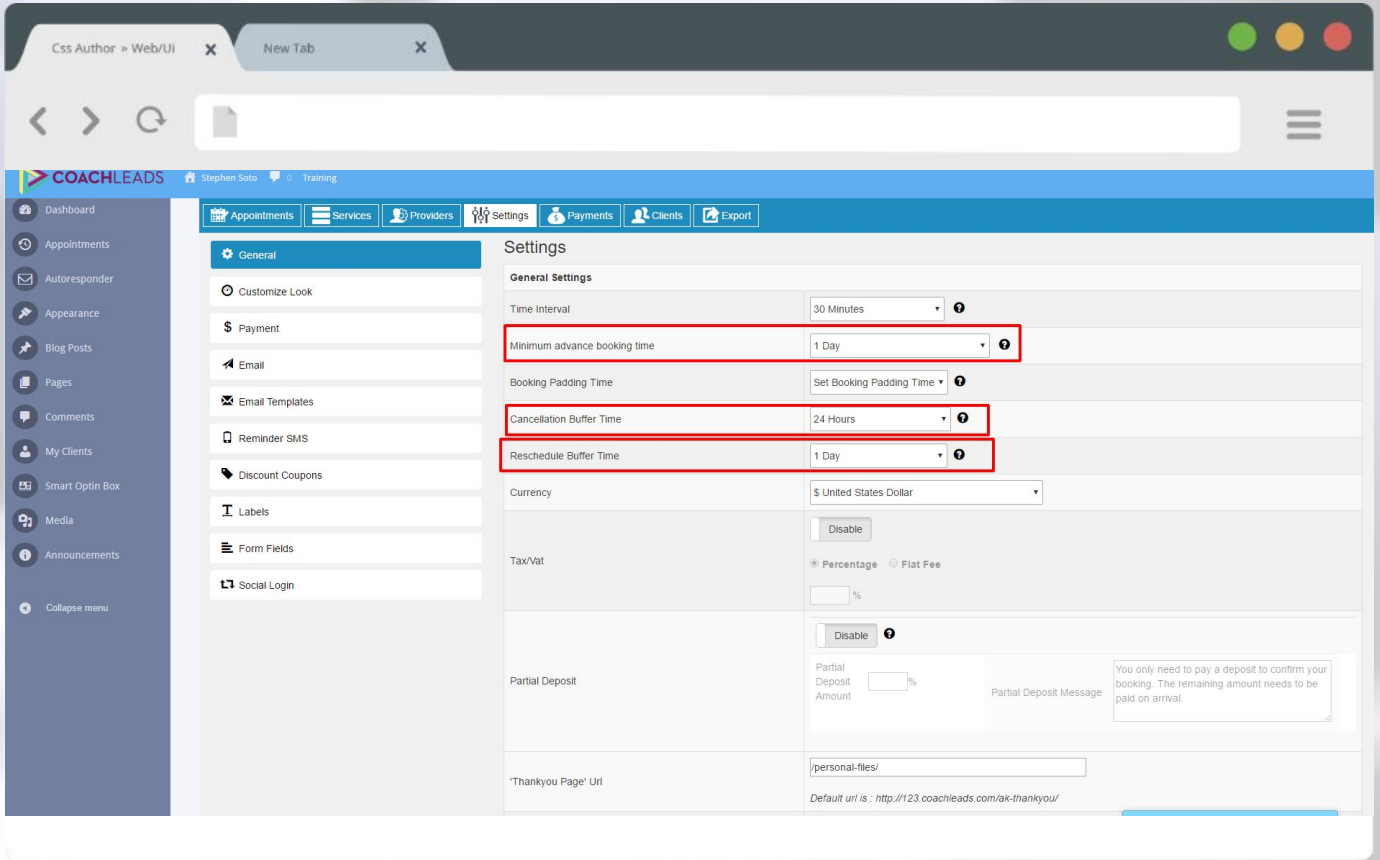
General: Time Intervals

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



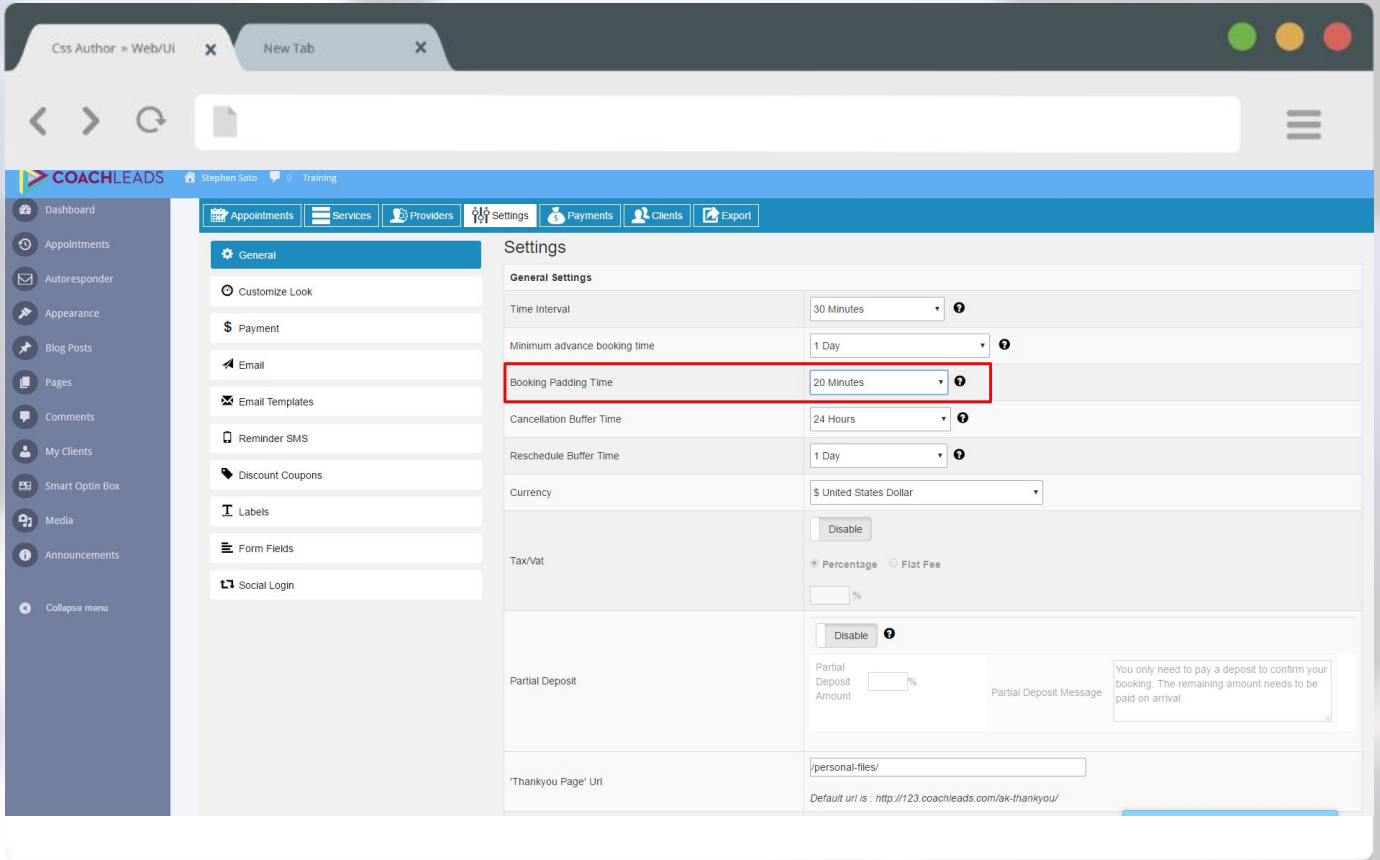
General: Booking and Buffer Time

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



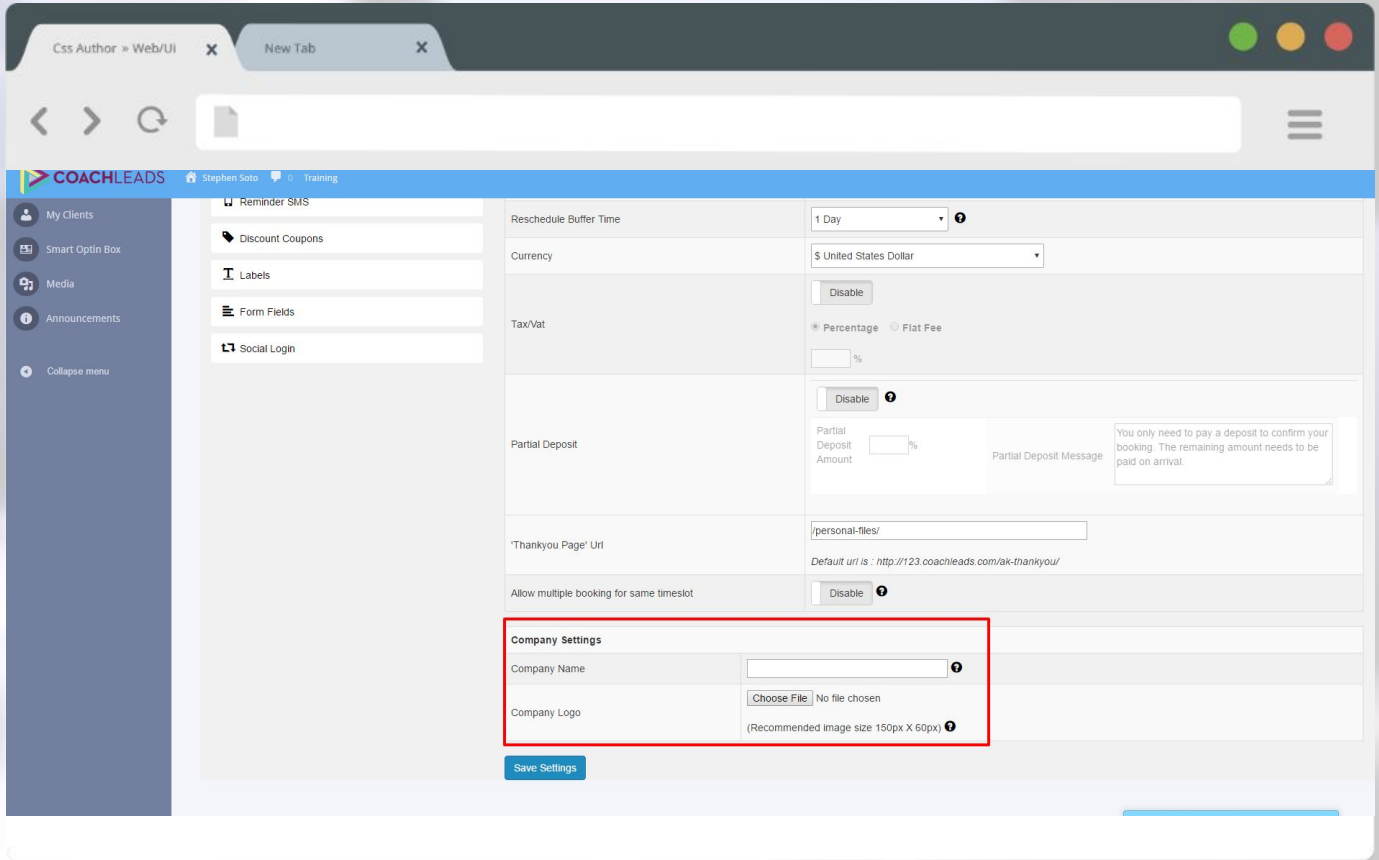
General: Booking Padding

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



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



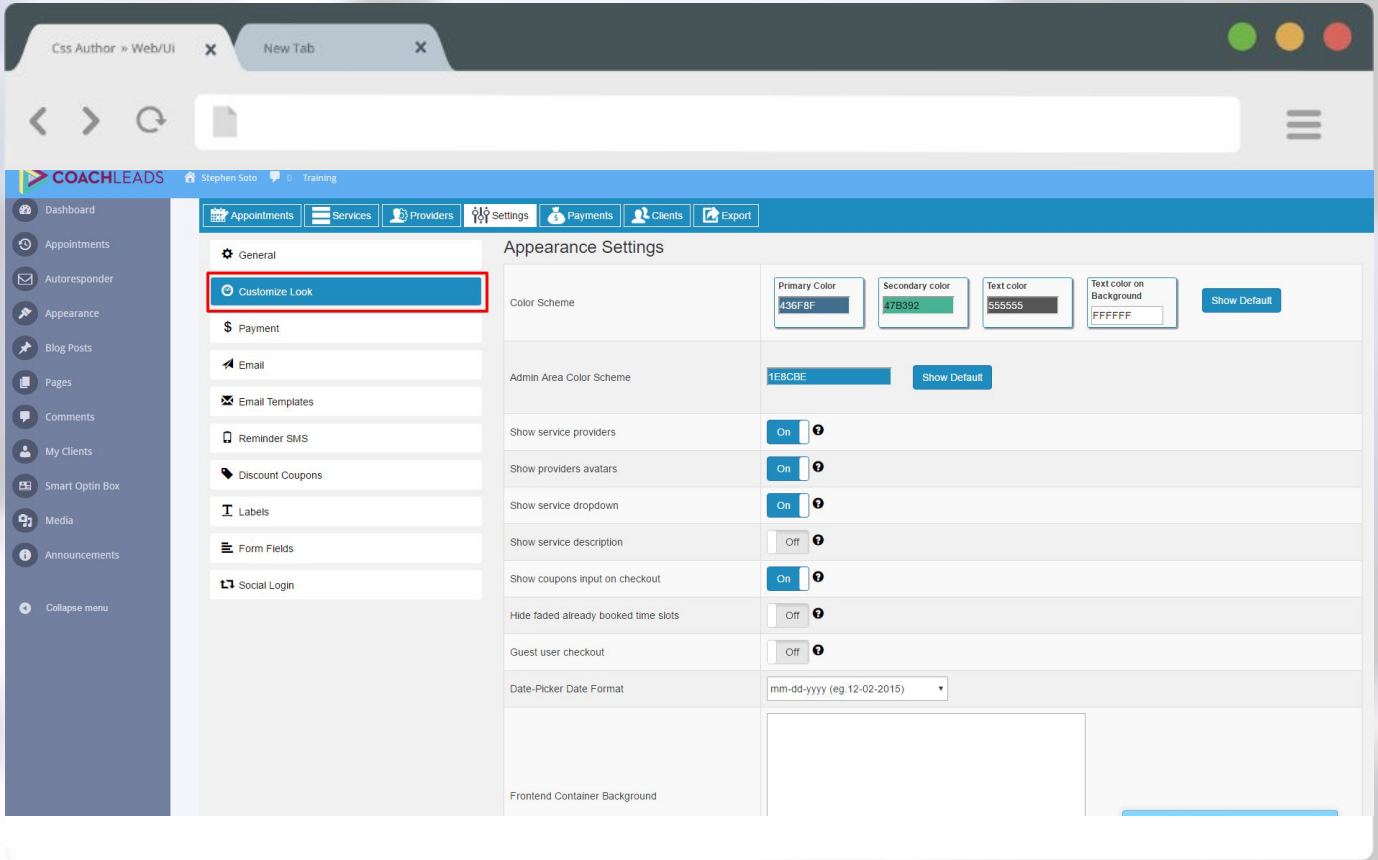
GENERAL SETTINGS

CUSTOMIZE LOOK

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

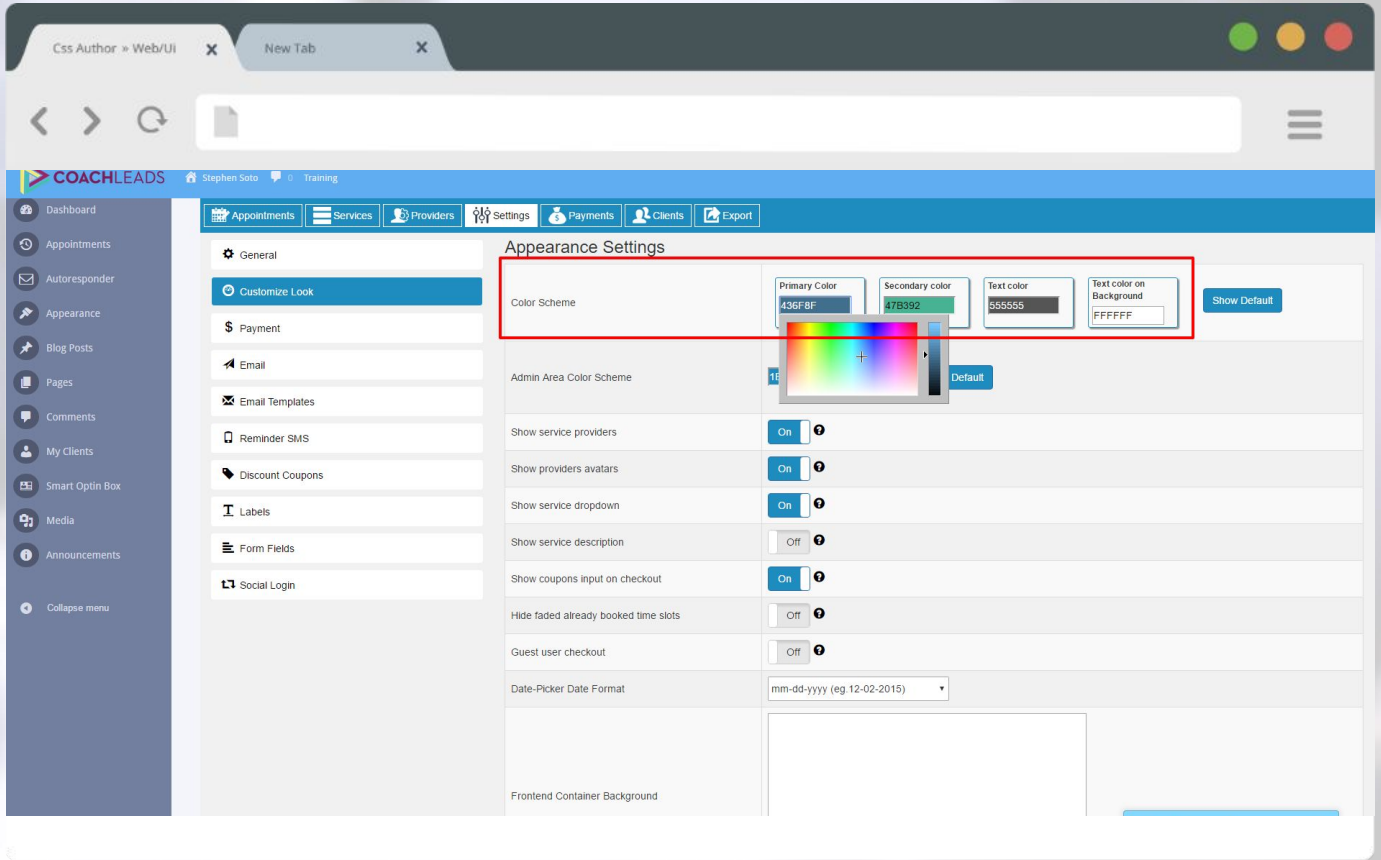
Customize Look

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

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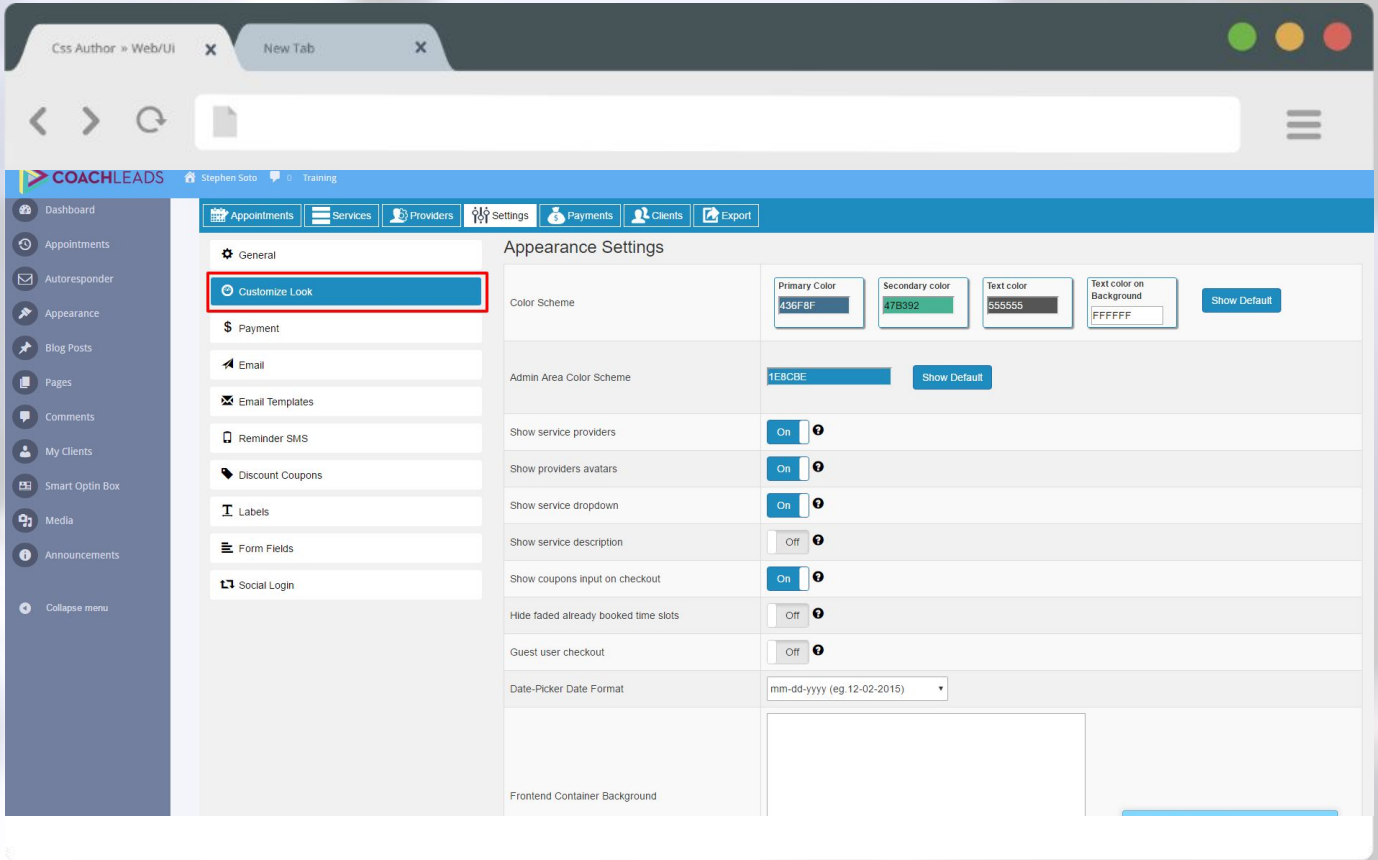


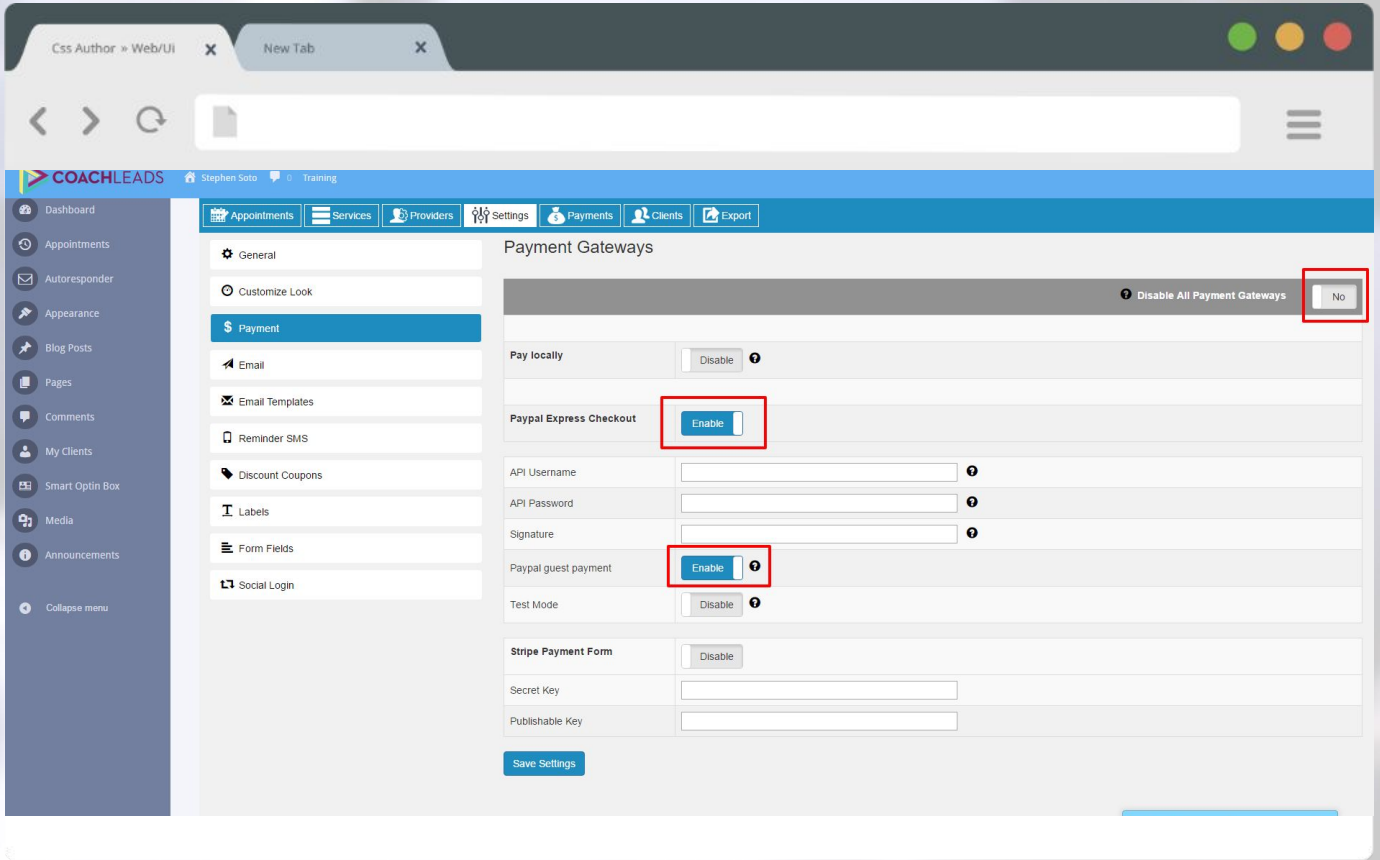
PAYMENTS

PAYPAL INTEGRATION

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

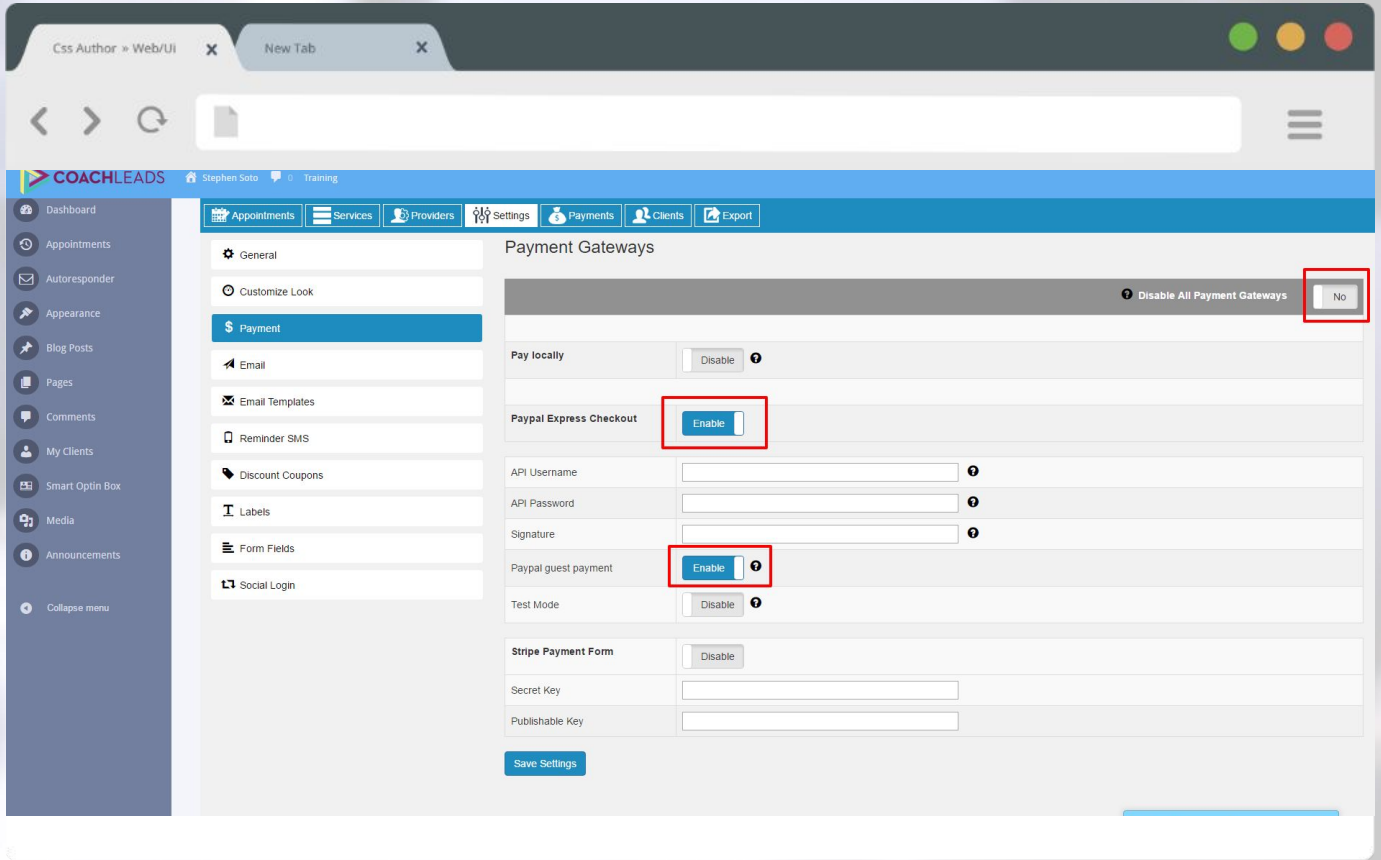
Payments: PayPal Options

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



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



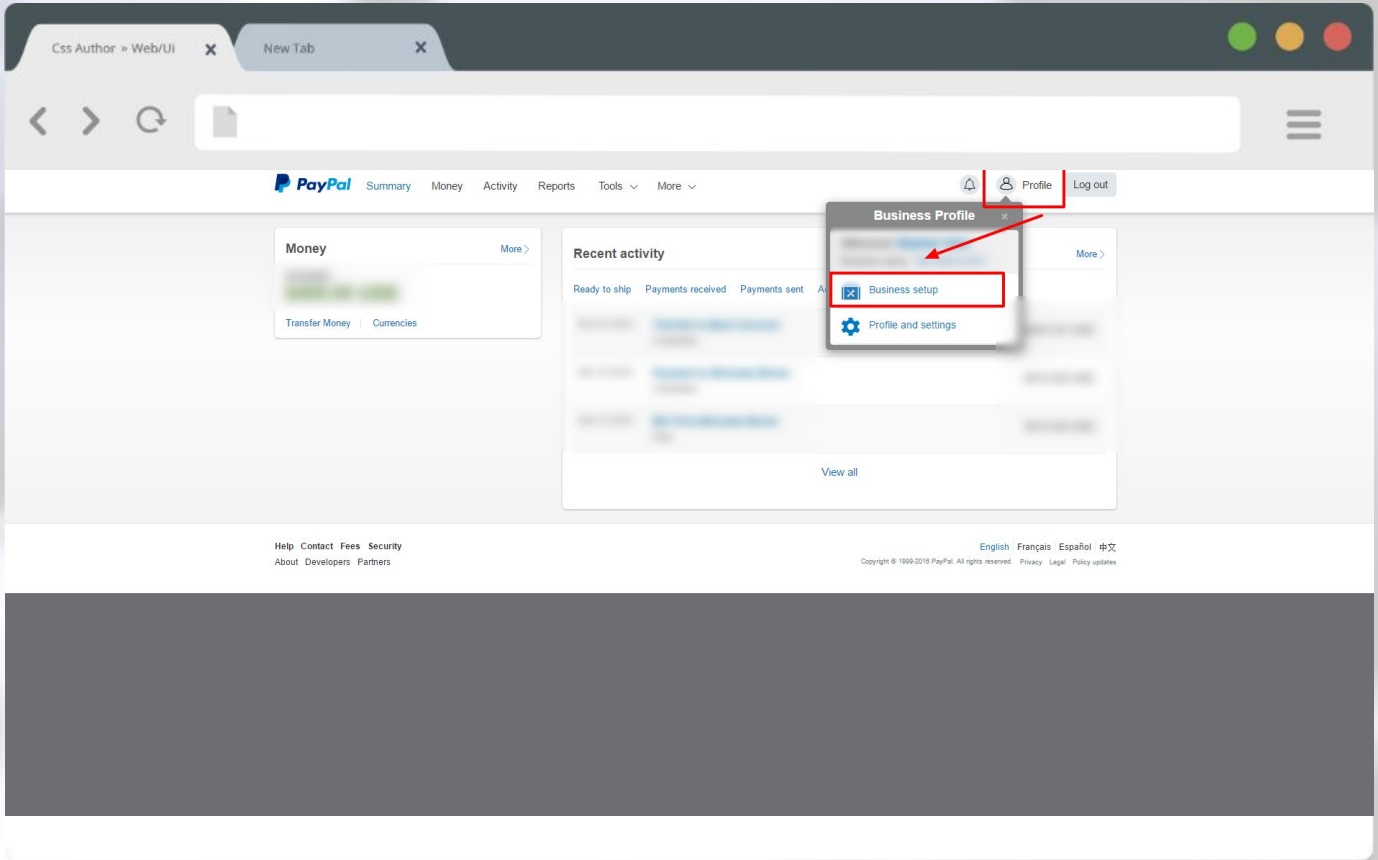
PAYPAL

API CREDENTIALS

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

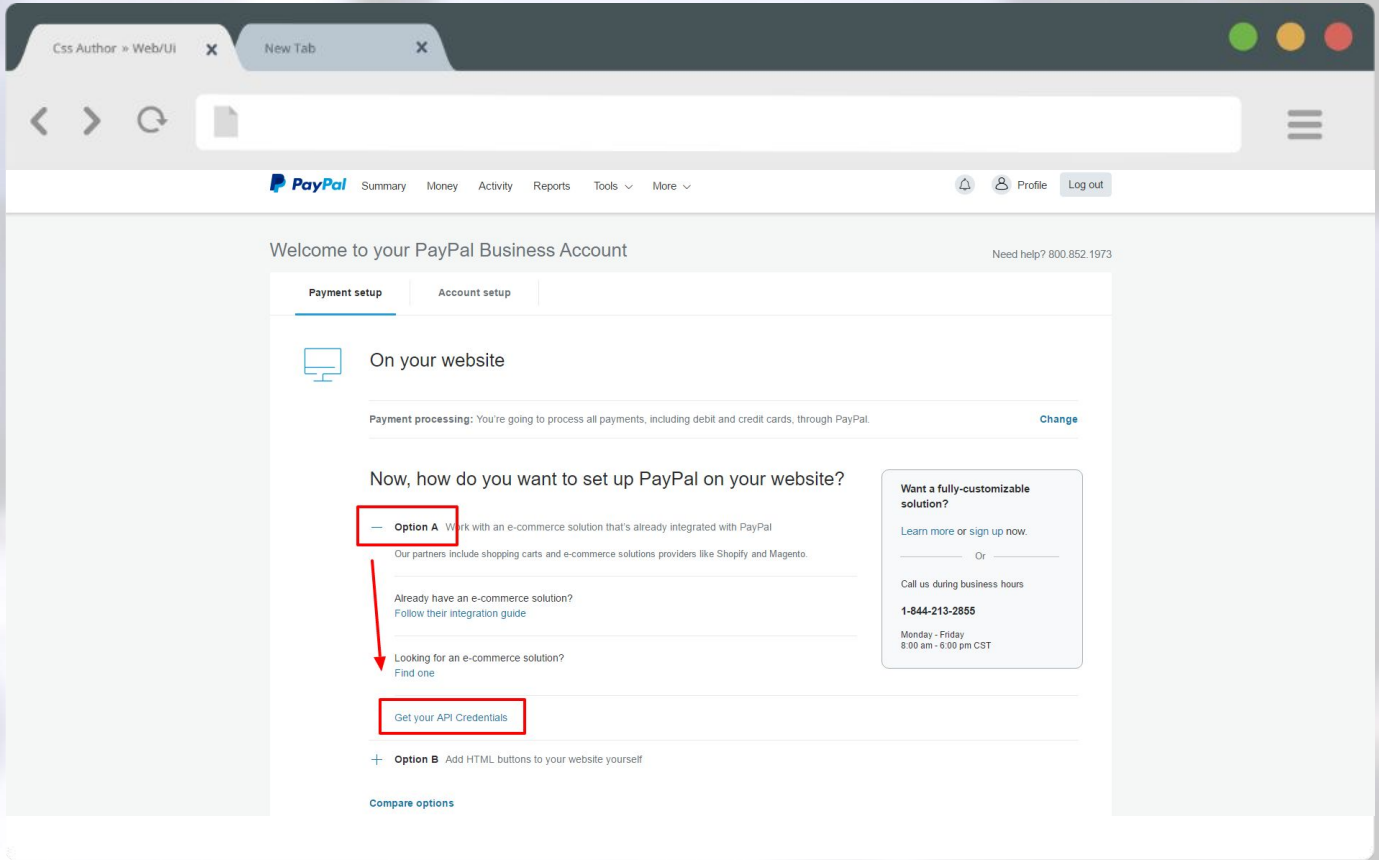
PayPal: API Credentials

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



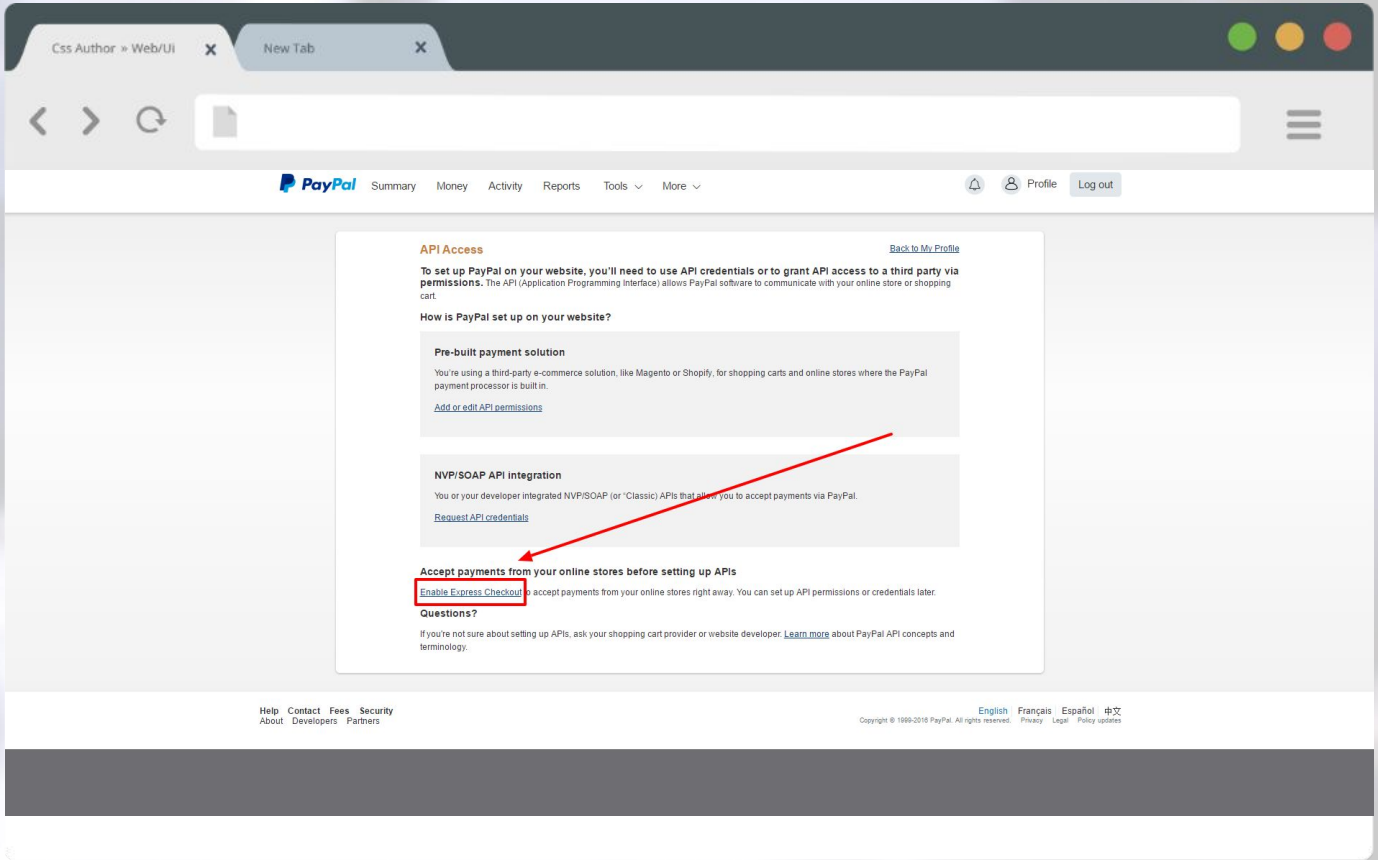
PayPal: API Credentials

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



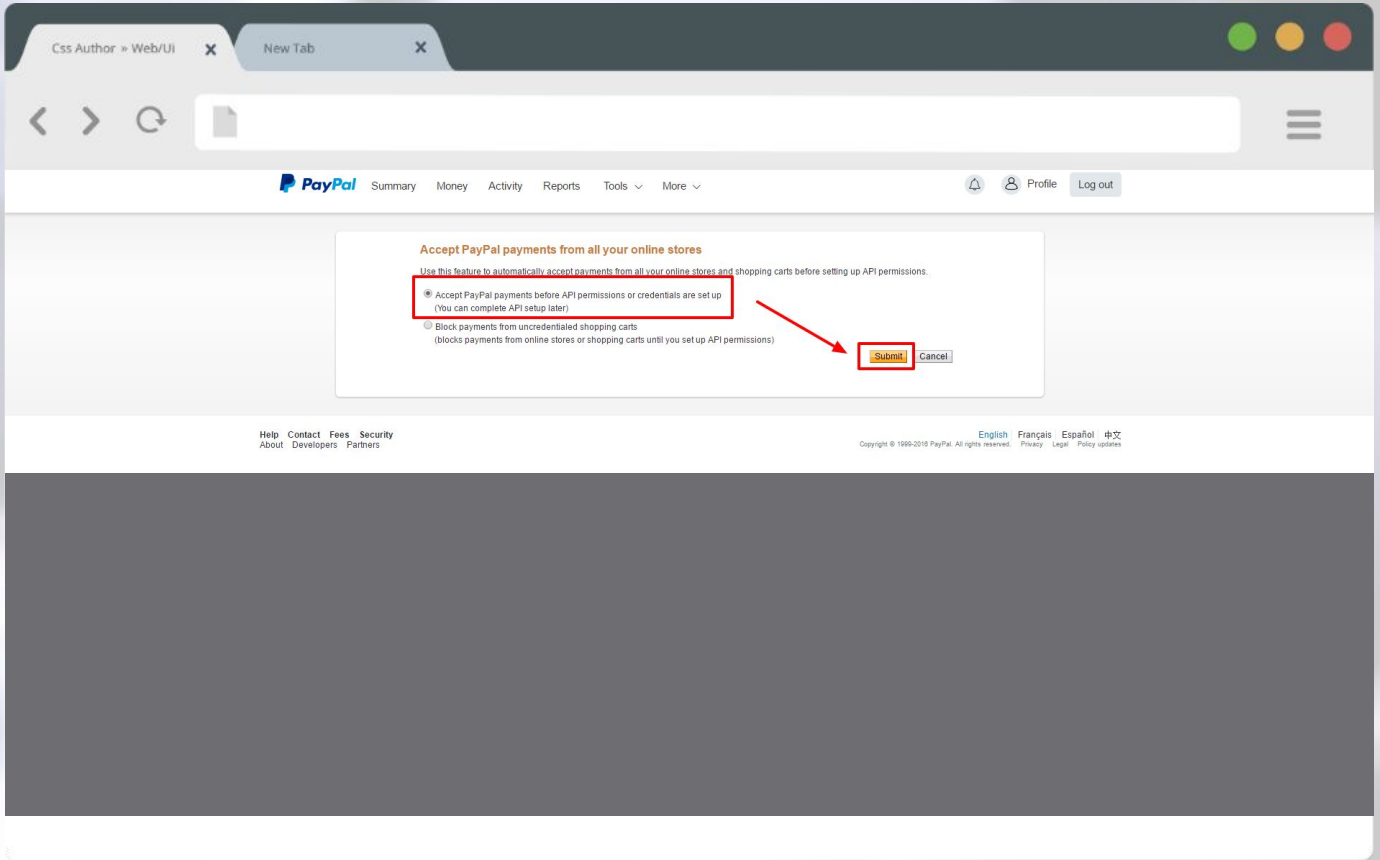
PayPal: API Credentials

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



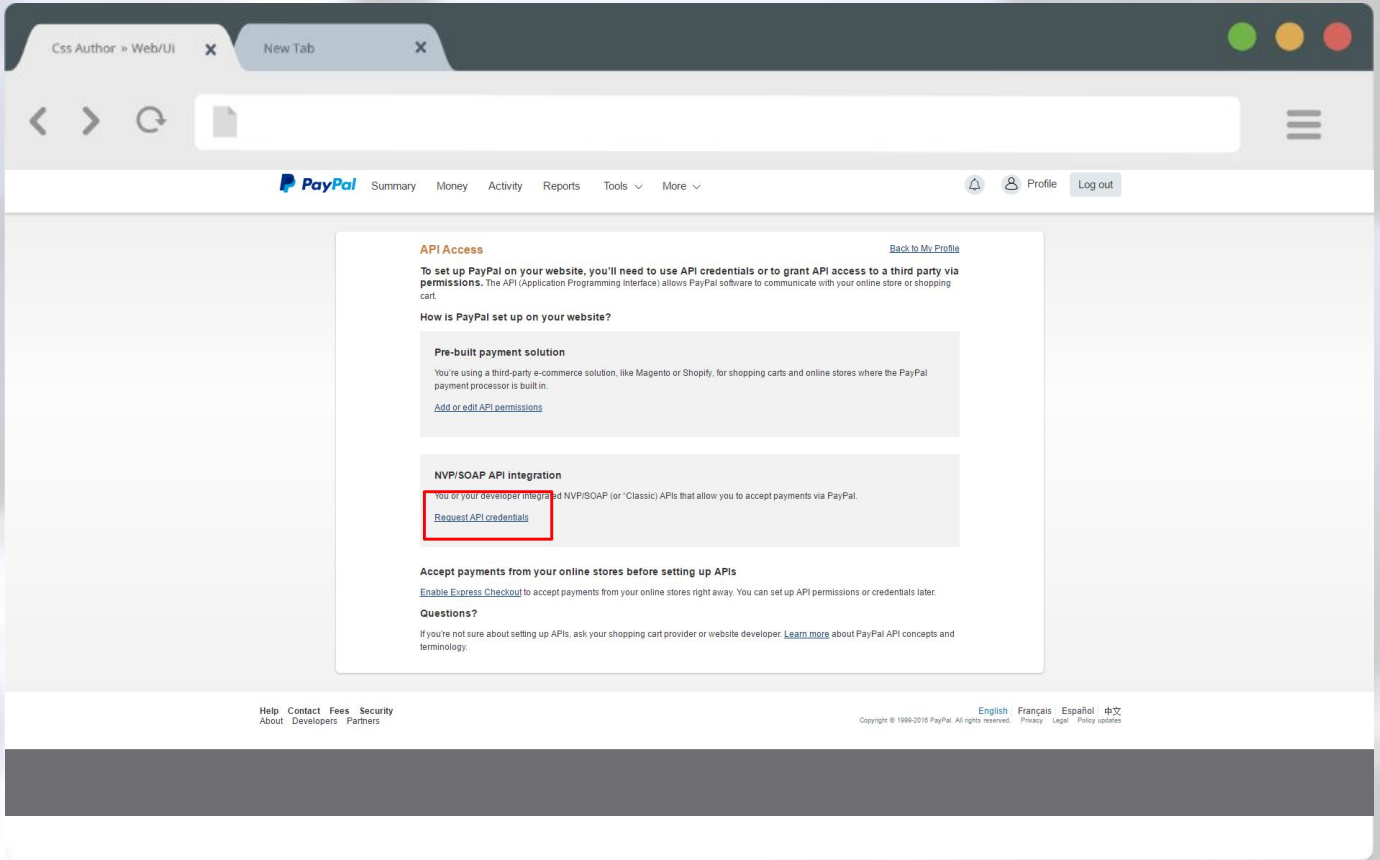
PayPal: API Credentials

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



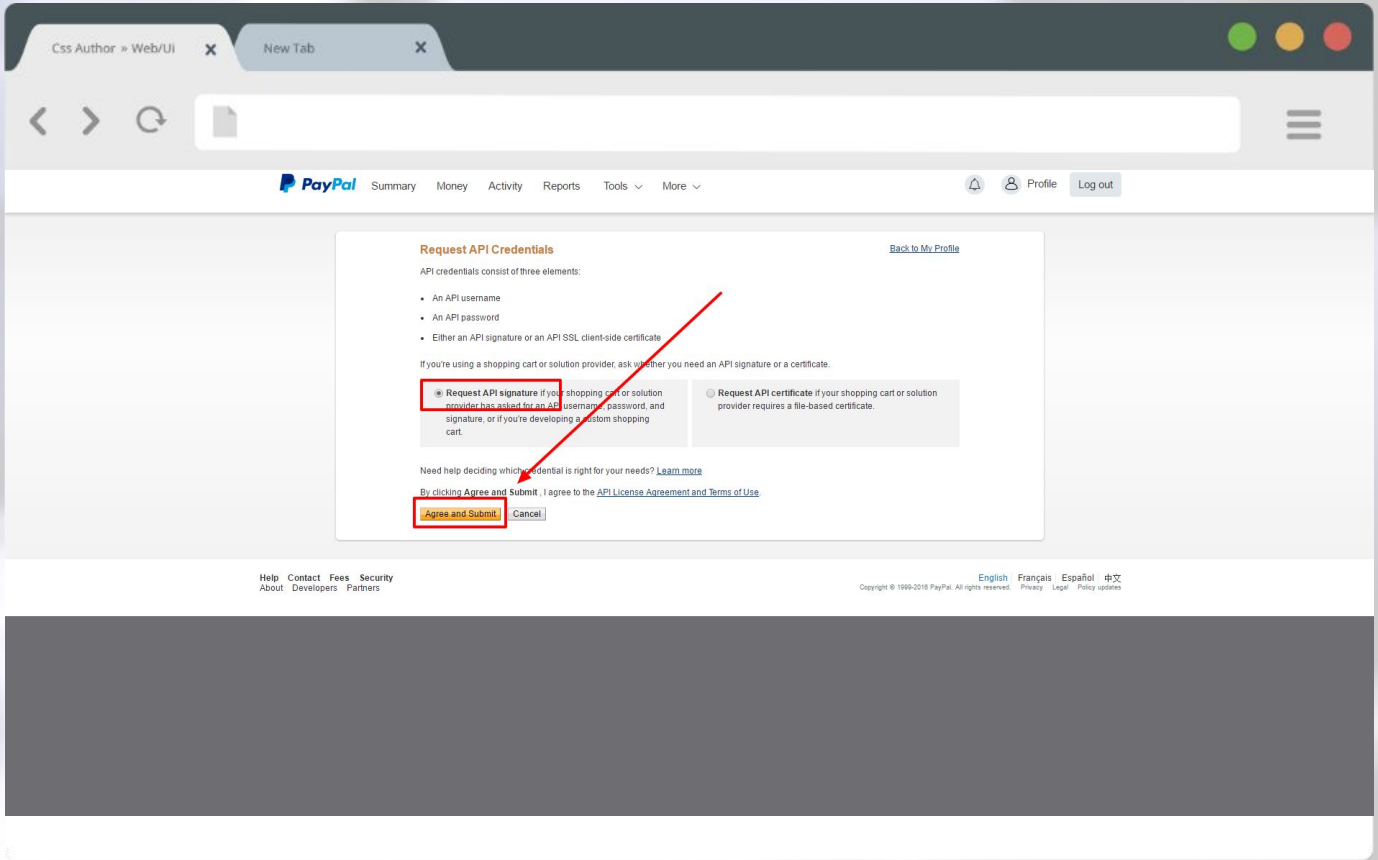
PayPal: API Credentials

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



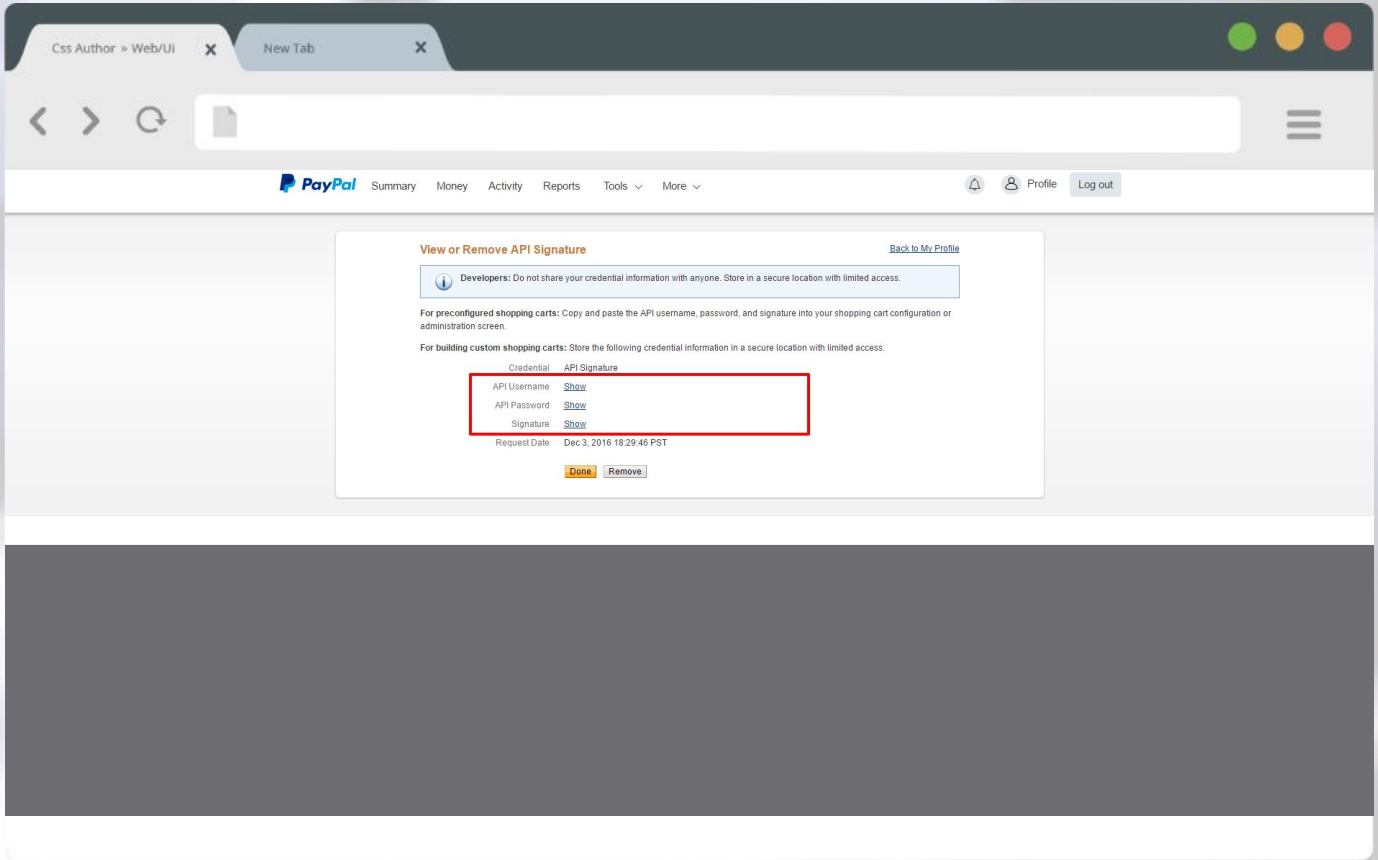
PayPal: API Credentials

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



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

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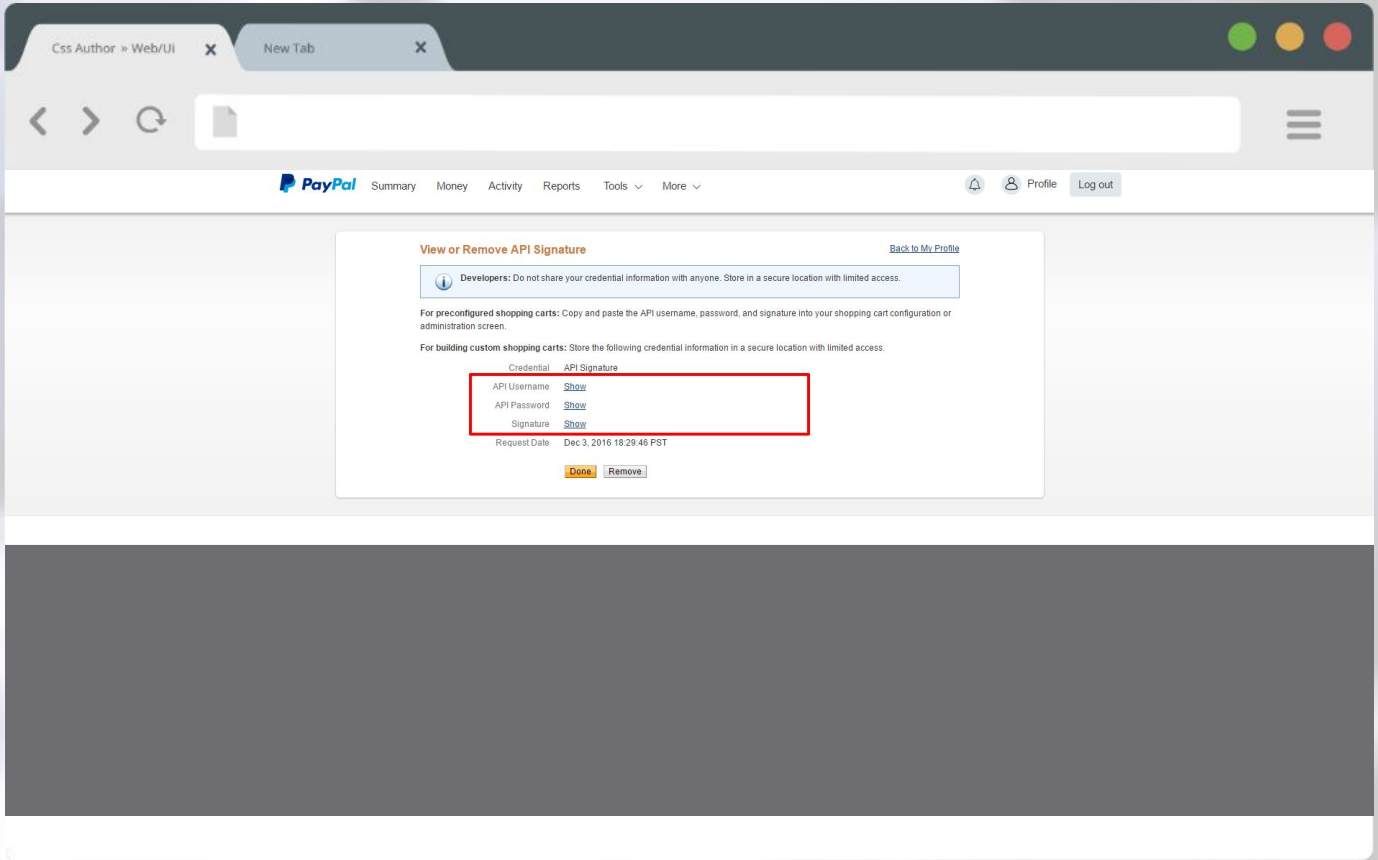
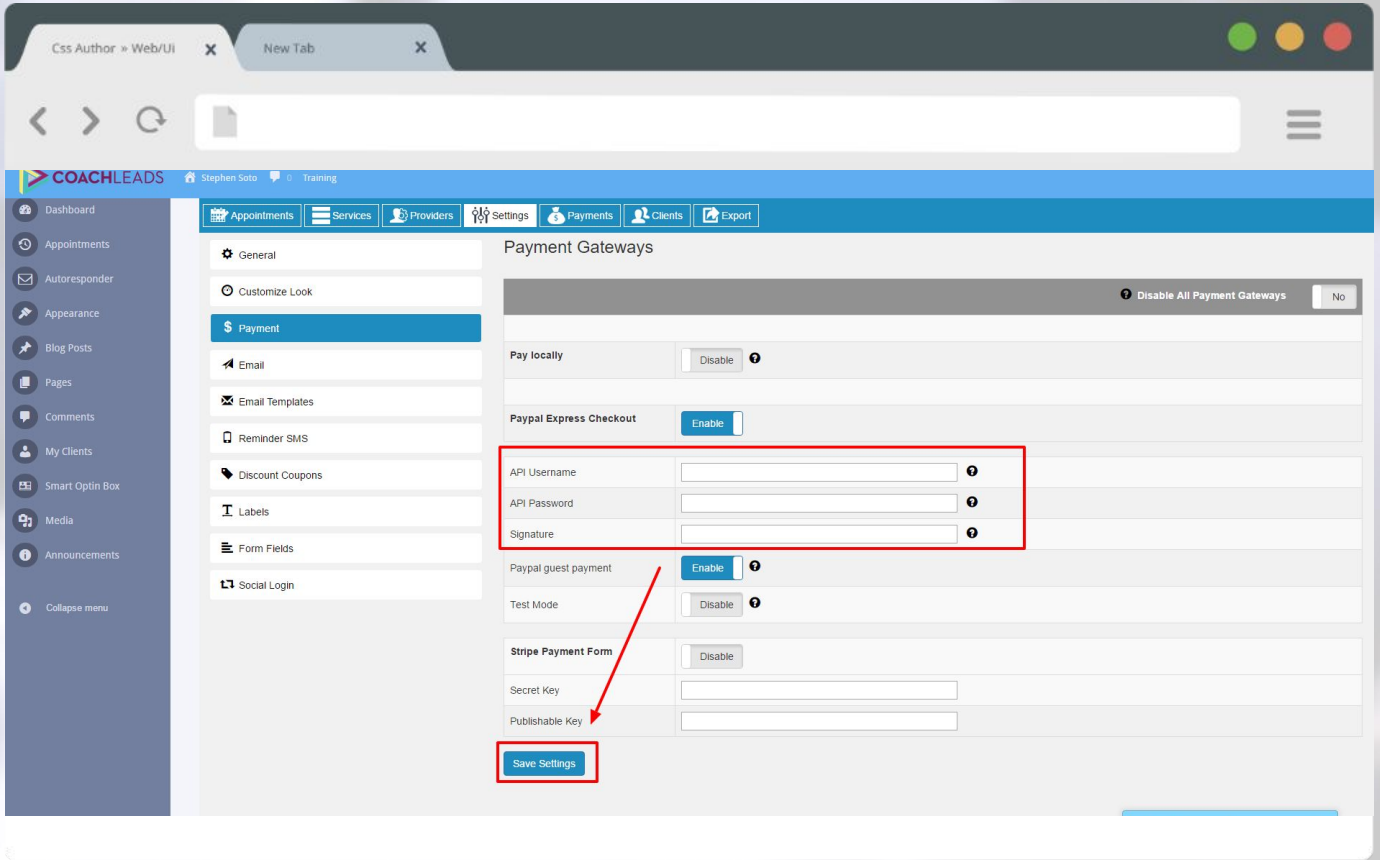


PayPal: API Credentials

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"



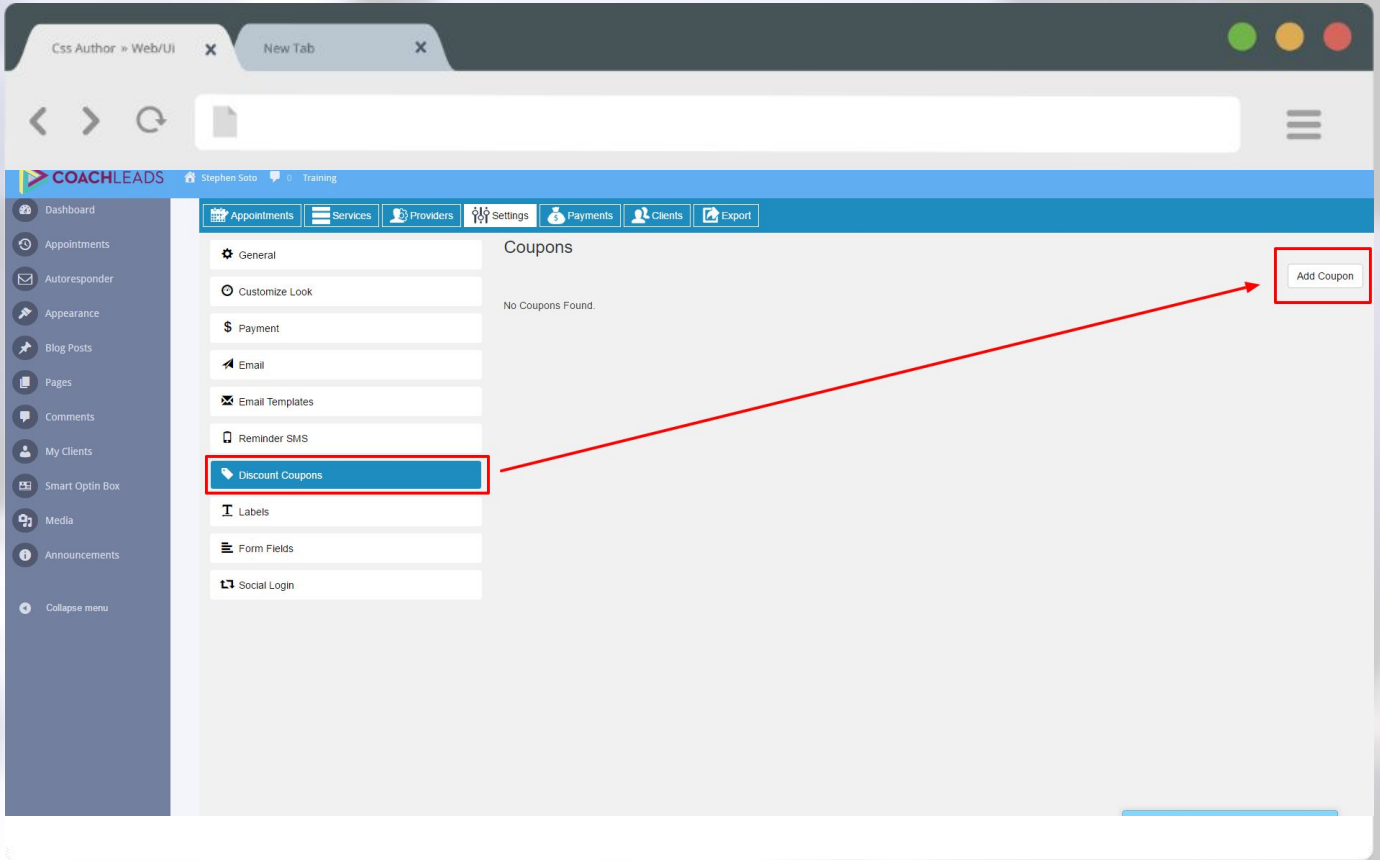
SETTINGS

DISCOUNT COUPONS

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

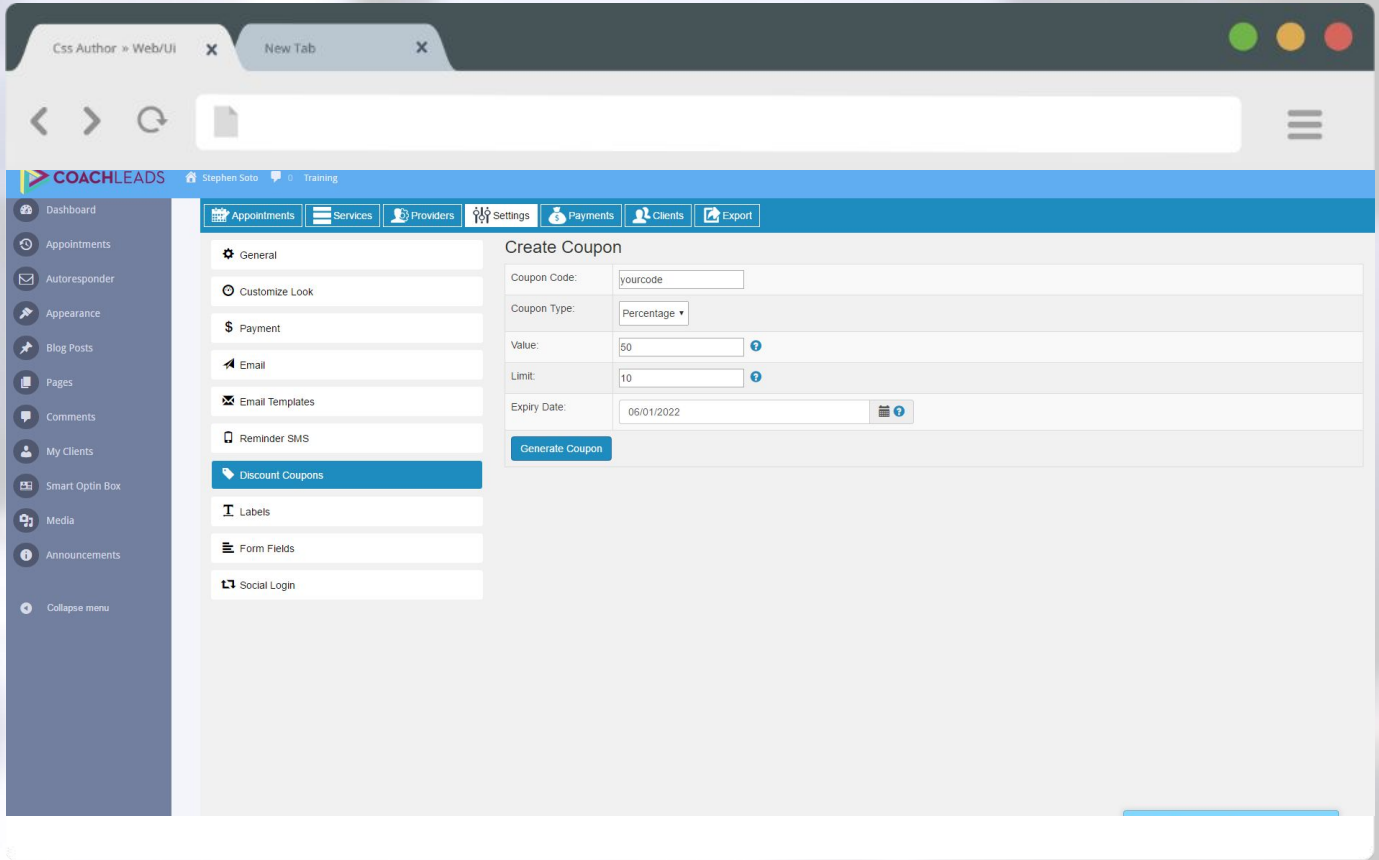
General: Discount Coupons

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



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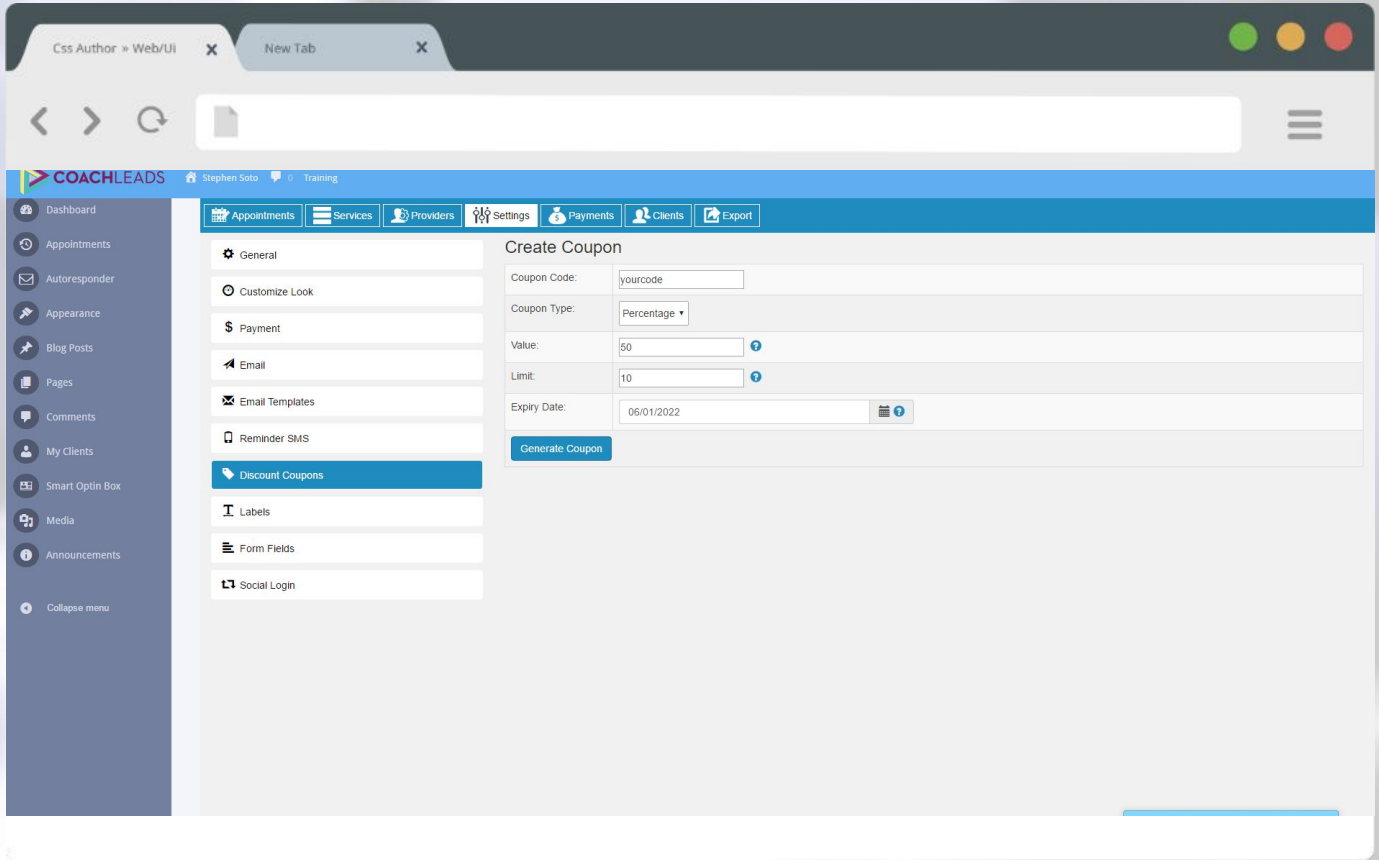
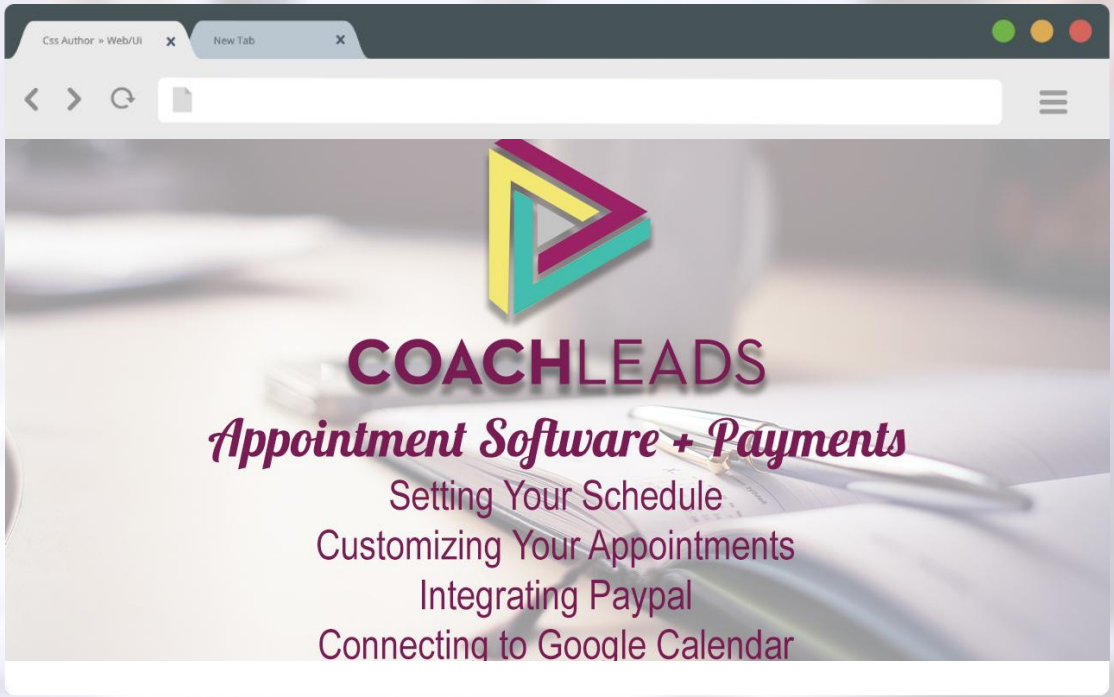


That's It!

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