# Client Compass 4 Help

## Help Documentation

# Table Of Contents

# 1 Overview

## 1.1 Getting Started

### Welcome to Client Compass™ 4.0!

Client Compass™ is designed for use with all your clients, in many coaching areas:

- Personal/life coaching
- Career coaching
- Transformation coaching
- Purpose coaching
- Leadership coaching
- Executive coaching
- Business coaching
- Corporate coaching

Whether you are an independent coach or an internal coach, the software will track client information and help direct you toward your own personal and professional successes.

### System Requirements

| | |
|---|---|
| Operating System | Windows 2000 SP4 or later (XP SP2, 2003, Vista) |
| Screen resolution | 800 x 600 (1024 x 768 recommended) |
| Memory | 128 MB minimum; 256 MB or higher recommended |
| Browser | IE 5.5 or later |

### Determining Client Compass™ Version

To determine the Client Compass™ version you are running go the Help Menu (Section 1.5.5).

## 1.2 Customizing Client Compass 4

Client Compass™ 4 offers many easy and exciting ways for you to customize the program to best fit your needs as a coach.

- Change or reword Screen Labels (Section 2.9.5) on over 30 screens throughout Client Compass™.
- Modify dropdown list for areas like Assessments (Section 2.4.2), Comments (Section 2.3.1) on the Events screen, Client Checklist, (Section 2.4.1) Payment Methods (Section 2.2.11) on the Terms screen, and more.
- Create Invoice Reports (Section 2.8.1) that reflect your coaching style and requirements
- Tailor the Shortcut Bar (Section 2.9.4) to better fit your skills and practice areas.
- Create custom Reports (Section 2.8) for your use as a coach and for use with your clients.

## 1.3 Trial Mode

### Using the Trial Mode of Client Compass™

When running in trial mode, Client Compass™ allows you to enjoy the benefits of many great features:

- Enter up to 5 clients by using the screens or importing the Client Info Form (Section 2.2).

- Import Prep Forms (Section 2.3.3) to help prepare yourself and the client for a coaching event.
- Explore the many Checklist and Assessment screens (Section 2.4) available for tracking your clients' progress.
- Use the Calendar (Section 2.5) to begin scheduling your appointments and coaching events with ease and precision.
- Consider the many screens in Practice Building (Section 2.6) that will help to build your coaching business.

To fully activate ('Activating Client Compass' in the on-line documentation) Client Compass™, follow the prompts in the Activation Wizard.

## 1.4 Installation and Troubleshooting

Setup for CD Installation

1. Be sure all other programs are shut down prior to installing Client Compass™.
2. Insert the CD in your CD-Rom Drive.
3. After a few moments, the installation program should start. If not, double click the Setup Icon found on the Client Compass™ CD.
4. Follow the setup prompts until the setup procedure is complete. If prompted to reboot, please do so, so that all changes are enabled.
5. Upon completion of the Install process, you should find the Client Compass™ program in your list of Programs. You can locate these by going to the Windows Start button. Then, go to Programs and scroll down until you find the Client Compass™ folder.

Troubleshooting Installation Problems

Client Compass™ is designed to be an easy installation for newer versions of Windows. If you encounter problems, it may be due to an older version of Microsoft products (i.e., Windows 98). If you have any problems, please visit our web site at http://www.clientcompass.custhelp.com (http://www.clientcompass.custhelp.com/).

## 1.5 General Layout

### 1.5.1 Action Bars

Action Bars appear at the bottom of some screens in Client Compass™. They contain buttons that allow you to quickly and easily implement important actions like importing forms, previewing reports, and making Outlook contacts.

- To use the Action Bar, click the desired button, then follow the prompts given.

### 1.5.2

### 1.5.3 File Menu

The File Menu is located on the Tool Bar at the top of your Client Compass™ screen.

Opening a Data File

1. Click the File menu on the Toolbar at the top of your screen.
2. Click Select Data File.
3. A dialog screen will appear, asking you to choose between opening an existing data file or creating a new one.
4. If you click Open an Existing Data File, you will go to your desktop, where you can choose the appropriate saved file.
5. If you click Create a New Data File, you will go to your desktop, where you can create a new name and data file.

#### Exiting Client Compass™

To exit Client Compass™, click the File Menu. Then click Exit.

You can also exit by clicking on the red X in the top right corner of your Client Compass™ screen.

### 1.5.4 Go Menu

The Go Menu is located on the Tool Bar at the top of your screen to give you another way to navigate quickly through Client Compass™.

- You will find ready access to the Next Screen, Previous Screen, and to the various groups and screens on the Navigation Bar.

### 1.5.5 Help Menu

The Help Menu is located on the Toolbar at the top of your Client Compass™ screen.

#### Help Documentation

Brings up help documentation for the screen you are currently viewing.

#### Technical Support

If you need technical support, please contact us at 800-762-2974 (domestic) or 317-572-3994 (international) Monday through Friday from 8:00 am until 8:00 pm Eastern time.

#### Client Compass™ Website

You can also visit our web site at httP://clientcompass.custhelp.com (http://clientcompass.custhelp.com/).

#### About Client Compass™

Displays information about the version of Client Compass™ you have installed. Click anywhere on the screen to return to the main program.

### 1.5.6 Navigation Bar

The Navigation Bar on the left side of your screen offers you an overview of, and easy access to, all the groups of Client Compass™:

- Client Info

- Coach Call
- Checklist and Assessments
- Calendar
- Practice Building
- Billing
- Reports
- Tools

By clicking on any of these, you will see the many screens for each group in the white section of the Navigation Bar. When you click a group button, you will see the first screen listed in the chosen group. To see another screen within a group, click that screen on the Navigation Bar.

#### Show & Hiding Groups on the Navigation Bar

- To see all eight groups on the Navigation Bar, move your mouse to the top edge of the Client Info button and drag upward.
- To see all screen options in the white section of the Navigation Bar you may need to drag the Client Info section down, thereby hiding some of the group buttons. In this case, these groups will be represented by the icons at the bottom of the Navigation Bar. If you do not see a particular group icon, drag the groups back up to reveal hidden icons.

### 1.5.7 Shortcut Bar

The Shortcut Bar is located near the top of your Client Compass™ screen. Clicking a button on the Shortcut Bar allows you to take a "shortcut" directly to the designated screen or activity.

#### Permanent Buttons on the Shortcut Bar

Home and Select Client button are always part of the Shortcut Bar. These allow you ready access to the Home Screen (Section 2.1) and are the quickest way to Select a Client.

#### Add Client Button on the Shortcut Bar

Add Client appears automatically on the Shortcut Bar but can be deleted (Section 2.9.4) from the Shortcut Bar if you desire.

#### Customizing the Shortcut Bar

You can add buttons to the Shortcut Bar by customizing (Section 2.9.4) it to better meet your needs.

## 1.6 Other Controls and Features

### 1.6.1 Using Check Boxes

A check box in Client Compass™ screens provides a quick way for you to indicate a simple choice or description.

1. To place a green check in a box, click the box with your mouse.
2. To remove the check, click the box again.

### 1.6.2 Using Data Grids

Throughout the program, you will use many data grids to organize information.

#### Using the Add and Delete Buttons

The Add and Delete buttons to the right of each data grid allow you to determine the size of each grid.

To add a goal or description, click Add. A black arrow will appear. Click the line following the arrow and type in the record.

To delete a goal or description, click the line you wish to delete and then click Delete. You will receive a prompt to confirm the delete command.

#### Moving through Grids

To move quickly between items on a grid, click a specific item or use the up and down arrows on your keyboard.

#### Changing Column Size in Grids

Click and drag the column division lines in the column heading line to change the size of the columns.

#### Sorting in Grids

To sort columns in either ascending or descending order, either numerically or alphabetically, click the heading. A second click will reverse the sorting order.

### 1.6.3 Using Dropdown Calendars

Client Compass™ has many dropdown calendars to help you enter dates quickly.

1. To enter a date using a dropdown calendar, click the arrow to the right of a text box requiring a date.
2. If the text box is blank, today's date will be highlighted by a red box. If the text box already contains a date it will be highlighted in blue.
3. To move between dates, use the arrow keys on your keyboard.
4. To move between months, click the blue arrows.
5. To select a date, click the number.
6. To enter a date using your keyboard instead, click the text box, then enter the date in a m/d/yy format.

### 1.6.4 Using Dropdown Lists

Client Compass™ uses many dropdown lists to help you enter data and make choices quickly and consistently.

1. To make a choice using a dropdown list, click the down arrow to the right of the text box.
2. Click the appropriate choice.

Some dropdown lists allow you to type in your own description using the keyboard rather than choosing from the list.

### 1.6.5 Using Rich Text Boxes

You can take notes on the Client Info screens and during Coach Call.

The Rich Text format gives you many options for entering and formatting your notes.

Here are a few tips on using Rich Text boxes:

1. Use the dropdown list by the first button to select one of seven available fonts.
2. Use the dropdown list by the second button to choose the point size.
3. Use the dropdown list by the  third button to choose one of four text colors—black, blue, red, and green.
4. Press CTRL  to strike through text.
5. Click the CTRL S button to place a stamp on your notes, indicating the user and editing date.
6. Click the B button to make your text bold, or press CTRL B.
7. Click the I button to italicize your text, or press CTRL I.
8. Click the U button to underline your text, or press CTRL U.
9. Click the (graphic here) button to left justify, or press CTRL L.
10. Click the (graphic here) button to center, or press CTRL E.
11. Click the (graphic here) button to right justify, or press CTRL R.

## 1.6.6 Using Scroll Bars

Scroll Bars are located to the right of many multiline text boxes, data grids, and reports in Client Compass™.

1. To view hidden text on any screen that includes a Scroll Bar, use your mouse to click the up or down arrows to move by line.
2. Click and drag the middle button up or down to move more quickly through the lines.

## 1.6.7 Using Text Boxes

The text boxes allow you to enter a variety of data on many screens in Client Compass™.

1. To enter data, click the desired text box.
2. Enter data using the keyboard or choose from a dropdown list, if applicable.

#### Multiline text boxes

Some text boxes are multiline text boxes, which allow you to enter an unlimited amount of text.

1. To enter data, click the desired text box.
2. To begin a new line in a multiline text box, then press ENTER.

#### Moving Between Text box Boxes on a Screen

1. To move between text boxes click with the mouse or press the TAB key.
2. If using the TAB key, press SHIFT+ TAB at the same time to move in reverse.

## 1.6.8 Moving the Screen and Changing Screen Size

You can move your Client Compass™ screen or change its size on your desktop.

1. To move the entire Client Compass™ screen click and drag the title bar at the top.
2. To increase or decrease the size of the screen, use your mouse to click and drag the edges of Client Compass™ screen.
3. To maximize the size of the screen, click the Maximize button on right end of the Toolbar.

4. To make the size smaller, click the Restore button, then use your mouse to click and drag the edges of the screen.

## 1.6.9 Saving Data

Data on each screen is automatically saved as you move to the next screen or exit the program.

## 1.6.10 Selecting a Client

### Selecting a Client

For most screens in Client Compass™, a client must be selected before beginning any activity.

You can do this in two ways:

- Click the desired client name in the list on the Home screen under Recently Selected Clients.
- Click Select Client on the Shortcut Bar, click the name, then click Select.

### Searching for a Specific Client

To search for a specific first name, last name, city, company, or title:

1. Click the dropdown list under search.
2. Click your selection.
3. Enter the value in the next text box (i.e., If you were looking for John Doe by last name, you would click Last Name, then enter Doe).
4. To complete the search, click Apply. To cancel the search, click Clear.

### Adding a New Client

To add a new client, go to the Select a Client screen, then click Add New. You will be brought to a blank Contact Info Screen.

### Deleting a Client

To delete a client:

1. Click Client Info.
2. Click Contact Info.
3. On the Action Bar, click Delete Client. A pop-up message box will appear, asking if you are sure you want to delete the client. If this is a client whom you have coached and for whom you have coaching notes and invoices, change the status to Inactive by clicking the dropdown list for Status, then selecting Inactive rather than permanently deleting the client.

## 1.6.11 Sending Email

To send an email to the client from within Client Compass™:

1. Click the envelope icon behind the appropriate email address.
2. Client Compass™ will connect you to Microsoft Outlook.
3. Type your message.
4. Click Send.

# 2 Screens

## 2.1 Home

The Home Screen allows you to access several areas of Client Compass™, quickly and easily.

- Trial Mode (Section 1.3) indicator with link for activating ('Activating Client Compass' in the on-line documentation) Client Compass™
- Quick Links

  Click these links to Add ('Adding a New Client' in the on-line documentation)New Client ('Adding a New Client' in the on-line documentation), View My Calendar (Section 2.5), and Work with Coaching Forms (Section 2.9.6), making work on these tasks more efficient.
- Recently Selected Clients

  Click Recently Selected Clients to see links to the last several clients you have viewed in Client Compass™.

  Click a client name to be brought directly to that person's Contact Info (Section 2.2.1) screen.
- Upcoming Events

  Click Upcoming Events to see the next several events on your Calendar (Section 2.5).
- Outstanding Invoices

  Click Outstanding Invoices (Section 2.7.1) to see links to invoices more than 30 days past due.

You can customize the Settings (Section 2.9.1) for each of these areas, including turning off the Quick Links settings.

Click Home on the Shortcut Bar (Section 2.9.4) to return to this screen.

## 2.2 Client Info

The Client Info group screens help you to manage all basic client information.  The areas in this group include:

- Contact Info
- Goals
- History
- Improvements
- Life
- Self
- Coaching
- Potential
- Culture/Company
- Documents

To access these screens click Client Info on the Navigation Bar.

### 2.2.1 Contact Info

This screen is your starting point for beginning work with a new client. It allows you to enter key personal and contact information.

- The text box are for family and other personal information about the client. All fields are optional.
- To enter the information:
  1. To enter Address and Children & Birthdays use the multiline text box. Note: Enter a child's date of birth rather than age, then you will not need to update this information.
  2. To select Client Type (Section 2.2.1.4) and Marital Status use the dropdown list.
  3. To select dates for Birthday and Anniversary Date use the dropdown calendar.
  4. To record other general information or comments about your client, use the Notes. Notes are edited in a Rich Text box.
- To enter the information directly from the client, send your client a copy of the Client Info Form (Section 2.9.6.2). Then use the data received by importing a completed Client Info Form ('Importing the Client Information Form' in the on-line documentation).

## 2.2.1.1 Client Info Form

The Client Info Form is a Microsoft Word document that allows you to gather information regarding all the areas in the Client Info Group.

You may gather this information gradually, entering it on the various screens as you work with a client, or you may use this form electronically by sending your client the Client Info Form.

You can customize (Section 2.9.6.1) this document to include other information.

### Emailing a Client Info Form

You should email (Section 1.6.11) this form to your client prior to the first main coaching event.

Once it has been returned, save it to your hard drive.

### Importing a Client Info Form

1. Click Import Info Form on the Action Bar at the bottom of the Contact Info screen.
2. A dialog screen will appear, asking you to confirm overwriting any current data. If you click Yes, you will be able to select the appropriate document to import. Once imported, the new data will be saved for the given client.

## 2.2.1.2 Copying to Outlook

You can include your clients in your Outlook Contacts.

1. Click the Copy to Outlook button on the Contact Info (Section 2.2.1) screen, and the client's name, his or her main address, and his or her phone and email information will be sent to your Contacts in Outlook.
2. A dialog screen will ask you to confirm this action. If you click Yes, the client will automatically be sent to Outlook. You will receive a confirmation.
3. Click No to cancel.
4. If you click the Copy to Outlook button again for the same client, you will see this dialog screen: "The client has been previously exported to Outlook. If you export again, a duplicate contact may be created. Do you want to continue?"

5. Click Yes to export the client again (perhaps with new information) or click Cancel. You will need to remove the old contact from Outlook manually.

### 2.2.1.3 Deleting a Client

To delete a client, click Delete Client on the Action Bar on the Contact Info Screen.

### 2.2.1.4 Determining Client Type

You may work with a variety of clients, and thus need to define and categorize them.

Here are some general guidelines:

- Corporate refers to a client for whom a company pays.
- Personal refers to a client who pays you to help him or her develop personal life goals.
- Career refers to a client who pays you to help him or her develop a career.
- Other can refer to any other categories of client.

## 2.2.2 Goals

This screen allows you to help your client identify and record important goals: short-term, long-term, and lifetime achievement goals.

1. To record these goals, use the data grid.
2. To designate the goal your client most wants to achieve, use the multiline text box.

## 2.2.3 History

This screen provides important background on your client: major life transitions, key struggles, other experiences with coachlike figures, and his or her notions of achievement.

1. To describe each of these background areas, use the multiline text box.
2. To define greatest achievements, use the data grid.

## 2.2.4 Improvements

This screen helps you and your client to identify improvements desired in key areas of his or her life: family, other relationships, finances, leisure, professional life, self-care, personal character, and learning.

- To describe these areas use the multiline text box.

## 2.2.5 Life

This screen encourages you and your client to look at the big picture by identifying overall feelings toward life, people who affect his or her life, stressors and joys.

1. To describe the general areas use the multiline text box.
2. To rate Stress Level use the dropdown list.
3. To list tolerations use the data grid.

   Tolerations are things the client is tolerating in life that may keep him or her from attaining goals with you as a coach.

   Common tolerations include: clutter, stress, poor routines, and inappropriate relationships.

## 2.2.6 Self

This screen records how the client is feeling—both positive and negative, as well as major personal concerns and fears about life overall.

- To describe these areas use the data grid.
- To describe what the client is learning and accepting about himself or herself use the multiline text box.

## 2.2.7 Coaching

This screen is an important guide for your interactions with your client, defining your client's expectations of your relationship and giving you guidelines for your coaching approaches and responses.

- To answer basic questions in this area use the multiline text box.
- To indicate the client's understanding of your basic practice policies and to record the client's preferred coaching methods, use the check box.

## 2.2.8 Potential

This screen allows you and your client to look beyond the moment to consider underlying beliefs about himself or herself and future potential, both positive and negative.

- To describe these areas use the multiline text box.

## 2.2.9 Culture / Company

This screen records a variety of background information about your client that may provide useful insights during your work.

- Note: The first description in each pair refers to information applicable to a personal coaching client (Section 2.2.1.4) while the second description in each pair refers to a corporate coaching client (Section 2.2.1.4).
- For the personal coaching client these areas include: tastes, hobbies, favorite music and authors, and favorite foods, among others.
- For the corporate coaching client these areas include: company info, key values, mission and vision, strengths and weaknesses, among others.
- To describe these areas use the multiline text box.

### 2.2.10 Documents

This screen records documents, websites, or digital media you have received from, or have sent to, a client.

- For work with a company, company department, or class, you may also use this screen to list Microsoft Excel spreadsheets or Word Documents detailing all the additional information you need to track these clients.
- To record a File Name, Date Entered, Description, and Comments use the data grid.

### 2.2.11 Terms

This screen allows you to record key information regarding the terms of scheduling, frequency, and payment for your coaching services

- To enter Start Dates and End Dates, use the dropdown calendar.
- To indicate Session Frequency, Typical Day of Session, and Method of Payment, use the dropdown list.
- To enter Comments use the multiline text box.

### 2.2.12 Custom Fields

This screen provides yet another way for your to record pertinent information about your client that may be specific to your needs as a coach or to the nature of your practice. You can easily customize (Section 2.9.5) these fields.

You may want to designate one or more of these fields for group coaching or other classes you may offer. For example, in a corporate coaching situation, show to whom each person reports, who the main contact is at the company, and any other information that may be unique to corporate coaching.

Other examples of how coaches use the Custom Fields include:

- Other phone numbers and email addresses
- Special promotions with start/end dates noted in the boxes
- Coaching fee quoted to a prospective client
- Discounts with start/end dates noted for reduced fees or pro bono work
- Name and date of person when a client met you at a public speaking event

To enter data, use the text box.

## 2.3 Coach Call

The Coach Call group screens help you to manage activities in and around an actual coaching event.

- You can use this part of the program in preparation for coaching events or to record and track information during the event.
- During any coaching event, you can access information stored in the Coach Call section or any other part of the program.
- Some of the functions of the Coach Call section allow you to:

1. Take notes on calls
2. Send E-Caps (electronic recaps) of sessions

3. Send and use Prep Forms to communicate key information with your client
4. Schedule actions for clients
5. Track large amounts of information

- Note: When you Add or Delete an Event (Section 2.3.1) from one screen in the Coach Call group, it will be added to or deleted from all the other screens in this group as well.
- Many of these screens can be customized.
- To access these screens, click Coach Call on the Navigation Bar.

## 2.3.1 Events

This screen gives you a way to record:

- The date of client events and scheduled sessions
- Time spent
- Important notes and comments regarding your interactions.

Events from this screen will also appear on the Prep Form (Section 2.3.3) and E-Cap (Section 2.3.2) screens.

### Starting a New Event

1. To start a new event, click Add.

   The most recent event will appear at the top of the Select list. This sort order allows you to see the last note you typed for a client. When it is time to begin a coaching session, your last conversation or notes you made during your last contact are readily available for review.

   Note: The date and time come from your computer clock. An incorrect date and time stamp may mean that you need to adjust your computer clock. You can do so by double clicking on the Windows Clock in the bottom right corner of the Windows screen. You can then change the date and time.

2. To make a change in am or pm, click the small up or down arrow buttons by the Event Date/Time text box.

### Deleting an Event Note

1. To delete all record of an Event Note, select a line, then click Delete.
2. Note: Once a note is deleted it is permanently gone from this screen as well as from the E-Cap and Prep Form screens.

### Giving the Event a Subject

To give a short description of your contact with a client, type in a Subject.

### Changing the Date and Time for an Event

1. To change the date and time for an event, click any section of the mm/dd/yy or the time designation.
2. Use the up and down arrows or the arrows on your keyboard to advance or go back in time.
3. You can also click the dropdown calendar to choose a new date.

### Taking Event Notes

To enter as much information as you wish into Notes, use the Rich Text box.

### Using the Comments Field

This field allows you to record activity that takes place in and around a coaching contact. Here you can record your client’s habits concerning contacts with you.

1. To enter information, click Comments.
2. To record Comments on client behavior, click to select certain behaviors and add your comments. By moving between contact dates, you will be able to review both positive and negative patterns.

#### Using the Call Timer

The Call Timer is a very helpful tool for keeping track of time spent with a client.

1. Click Start Timer to begin the timer.
2. Click Stop at the end of your client’s session. You will see the total amount of time spent on the call.
3. To select either Billable Minutes or Nonbillable Minutes use the dropdown list. The time will then be placed in either of these fields.
4. To choose where to apply the time, click This Event or New Event. When you choose the latter, a new note (date and time) will appear in the list on the left.
5. To clear time and begin the call timer again, click Clear.

### 2.3.2 E-Cap (Electronic Recap)

This screen allows you to create an electronic recap of the coaching session.

- Some coaches do these summaries during the call, while others compose them from their notes shortly thereafter.
- You can make comments on items arising during the coaching session in the areas of Awareness, Vision, Strategy, Action, and Other observations
- You can then send this E-Cap to the client for an immediate reinforcement of the insights you shared in your coaching session. This is also a way that you can make note of the homework to be completed before the next session.
- You can also customize (Section 2.9.5) the E-Cap to reflect other specific things that you focus on as a coach.

#### Creating an E-Cap

1. Click the desired date from the Select list.
2. Click Add to enter a new date. This will insert the current date and time into a new E-Cap.

#### Deleting an E-Cap

1. Click the listing to delete.
2. Click the Delete button. All of the fields of the selected E-Cap will be deleted after you confirm the prompt.

#### Previewing an E-Cap

1. To preview an E-Cap before sending it to your client, click Preview Report on the Action Bar.
2. Use the Preview Toolbar (Section 2.8.2) to email this report to your client.

### 2.3.3 Prep Form

This form records information that your client sends to you between coaching events, allowing you to see what he or she is doing.

- The Prep Form includes: things accomplished or learned, things not accomplished, challenges and concerns, obstacles, things for which the client is grateful, and other needs.
- You can also customize (Section 2.9.6.1) the Prep Form to reflect other things that you may focus on as a coach.

Previewing and Emailing a Prep Form

1. To preview the Prep Form, click Preview Report.
2. Use the Preview Toolbar (Section 2.8.2) to email this form to your client at a reasonable time prior to a contact.
3. Once it has been returned, save it to your hard drive.

Importing a Prep Form

1. Click Import Prep Form on the Action Bar at the bottom of the Prep Form screen.
2. A dialog screen will appear, asking you to confirm the overwrite command.
3. Click Yes and you will be able to select the appropriate document to import.
4. Once imported, the new data will be saved for the given client.

### 2.3.4 Score Improvements

This screen gives an overview of testing/assessment devices used by your client.

- To indicate Inventory Scores Improved, the Date, and the Score use the data grid.

### 2.3.5 Breakthroughs

This screen allows you to track client progress over a period of time by noting unexpected wins or breakthroughs.

- To record the date and unexpected wins and breakthroughs use the data grid.

### 2.3.6 Client Care

This screen allows you to keep a record of the impact of gifts that you send to a client.

- By using these records, for example, you avoid duplicating certain greeting cards or email cards that you enjoy sending.

  (Two resources for electronic cards are www.CoachCards.com (http://www.coachcards.com/) and www.BlueMountain.com (http://www.bluemountain.com/)).
- To record the Date and Action use the data grid.

### 2.3.7 Profile

This screen gives you an overview of the top Values and Needs of the client.

- To describe your client’s Top Needs and Top Values use the data grid.

### 2.3.8 Referrals

This screen allows you to track the referrals a client sends you.

- To list the Name of the referral, the Start and End Dates, How Client is a Good Fit, and a Note use the data grid.

## 2.4 Checklists and Assessments

The Checklists and Assessments group screens give you more ways to gather and manage information about client interactions and progress. You can:

- Track administrative tasks you need to accomplish with a client
- Record a client's progress with a variety of Assessments and Programs
- Help your client track Goals and Daily Habits

Some of the areas in the Coach Call (Section 2.3) section are duplicated here for easy access.

You can customize (Section 2.9.5) any of these screens.

### 2.4.1 Client Checklist

This screen enables you to track typical administrative tasks.

1. To indicate completion of an administrative task, click the appropriate task in the data grid.
2. To enter the Date, click the appropriate line and use the dropdown calendar.
3. To enter a Comment, click the appropriate line and enter your note in the data grid.
4. To create a report, click the Preview Report button on the Action Bar and use the Preview Toolbar (Section 2.8.2) to help you view and print the report.

### 2.4.2 Assessments

This screen allows you to record the scores for common assessments you might use with the client, including Myers-Briggs, DiSC, and the Birkman Method.

1. To enter the name of the testing Instrument and to comment on your client's Results, use the data grid.
2. To enter the date the test was completed, use the dropdown calendar within the data grid.
3. To create a report, click the Preview Report button on the Action Bar.
4. Use the Preview Toolbar (Section 2.8.2) to help you view and print the report.

### 2.4.3 Programs

This screen allows you to record the client's increasing scores in different coaching programs.

Some popular programs are available through Coachville at www.Coachville.com (http://www.coachville.com/).

1. To record information here use the data grid.
2. To create a report, click the Preview Report button on the Action Bar.
3. Use the Preview Toolbar (Section 2.8.2) to help you view and print the report.

### 2.4.4 Goal Tracking

This screen allows you to capture the client's goals over time, allowing you and the client to see progress made.

You may wish to communicate these results to him or her periodically, especially if the client seems discouraged over a perceived lack of progress.

1. To enter the Date Set and Date Reached use the dropdown calendar.
2. To enter a full Description of the goal use the data grid.
3. To create a report, click the Preview Report button on the Action Bar.
4. Use the Preview Toolbar (Section 2.8.2) to help you view and print the report.

### 2.4.5 Daily Habits

This screen allows you to describe the daily habits that should be adopted by your client and to record how many days each month the habits are performed. You can track how successful the client is in maintaining daily habits necessary for meeting his or her goals.

1. To enter the Date use the dropdown calendar.
2. To enter a Description and to indicate Days Completed This Month, use the data grid.
3. To create a report, click the Preview Report button on the Action Bar and use the Preview Toolbar (Section 2.8.2) to help you view and print the report.

### 2.4.6 Client at a Glance

This screen shows you client records in the following areas:

- Goals
- Daily Habits
- Improvements
- Breakthroughs

1. To enter a dates use the dropdown calendar.
2. To enter Descriptions and other data use the data grid.
3. Note: Changes on this screen will make changes to that screen in the Checklists and Assessments group.

## 2.5 Calendar

This screen enables you to schedule appointments or tasks to be done for or with clients.

- You may also schedule personal.
- Once you have scheduled items, you can view and print a range of days from your calendar.
- Any Event (Section 2.3.1) entered in the Coach Call group (Section 2.3) of the Navigation Bar will appear on your Calendar.
- You will initially see today's calendar when you choose the Calendar screen.

- Business hours are shown in a lighter color.
- Note: Remember that any changes made to an event on the Calendar screen will also be made in the Coach Call group screens.

### Calendar Types

1. Monthly calendars will always appear along the side of your screen.
2. To change the main calendar view, click Day, Month, Week, or Work Week on the Action Bar.
3. The dates chosen will then be highlighted in on the monthly calendars as well.

### Changing Months and Years

1. To move from month to month, click the black directional arrows by the month name on the top left.
2. To more from year to year, click the black directional arrows by the year on the top left.

### Viewing Items on a Specific Day

1. Click the specific day you wish to view from the monthly calendars.
2. Scroll through a given day using the scroll bar or the up and down arrows on your keyboard.
3. Move backward and forward a day by using the left and right arrows on your keyboard.

### Placing a New Event on the Schedule

1. Click the Add Event button on the Action Bar near the bottom of the screen or double click anywhere in the scheduling area.
2. You will go to an Event screen.

### Editing an Event

1. To edit an event, double click it. You will go directly to an Edit Event screen on which you can make the necessary changes.
2. To move an event to a different place on your calendar, simply click and drag the chosen event to a new spot.
3. Note: Remember that any changes made to an event on the Calendar screen will also be made in the Coach Call group screens.

### Deleting an Event

1. Double click the item you wish to delete.
2. When the Edit Appointment window appears, click Delete.
3. When prompted, confirm your delete command by clicking Yes.

### Integrating with Microsoft Outlook

1. To integrate your Calendar with Outlook, click the checkbox on the Settings (Section 2.9.1) screen in the Tools Group.
2. When you export clients to Outlook, your Calendar events will also be sent to Outlook.

### Previewing and Printing Your Schedule

1. To preview and/or print the schedule on your screen, click Print on the Action Bar at the bottom of the screen.
2. You will see a print preview.
3. Use the Preview Toolbar to help you view, then print.

## 2.6 Practice Building

The Practice Building group screens offer a variety of screens that help you define and expand your coaching practice.

You can:

- Make and Record Projections and results
- Define your Ideal Practice
- Devise an Action Plan
- Track Coach Training and Coach Mentoring opportunities
- Run reports detailing how coaching time was spent

In addition this group contains links allowing you to easily create tasks and appointments in Microsoft Outlook and access your Outlook calendar.

To access these screens click Practice Building on the Navigation Bar.

### 2.6.1 Practice Projection

This screen is an important part of defining and recording the growth of your practice.

1. To select a Projection Area use the dropdown list.
2. To enter a date use the dropdown calendar.
3. To enter the Projection and Actual numbers use the data grid.

Practice Projection areas include:

- New Clients

  Record the number of new clients you add each month. This allows you to track cycles or seasonal patterns. In addition, you can check parallels between other actions and the growth of your practice.
- Marketing Strategies

  Record anything that you use to build your practice. For example, describe attraction strategies you use to draw in clients.

  See also Action Plan to track marketing plans and actions on a daily basis.
- Added Value

  As you build your practice, you will want to increase the value you offer to clients. Enter a new value here so you can track whether or not it effects the growth of your practice. For example, if you begin offering E-Caps (summaries of coaching sessions) you may see a dramatic increase in new clients in the subsequent months.
- Business Purchases

  Record any major purchases that are investments in the growth of your practice (e.g. a laptop, software upgrade, copy machine, headset).
- Delegation

  Record any personal or professional services that you have hired to allow you to focus more attention on the business. By tracking these, you can see the effects of outsourcing or delegation on the growth of your practice.
- Continuing Education

  This is a broad category that includes any plans you have for improving your professional coaching skills. These could include seminars, online classes, books, courses, or other events that you find helpful in the development of your skills as a coach.

See also Coach Training and Coach Mentoring to track time spent.

- Profit Centers

  This section tracks any sources of income in your practice beyond one-on-one coaching. Planning and tracking these can greatly increase your profitability as a coach.

- Rate Increases

  This section provides a record of planned and actual increases of your rates. Seeing this regularly can give you the confidence to go through with the increases and gives clients enough notice to adjust to your plan.

  See also Ideal Practice to define fees and ideal income

- Income Increases

  This is a good place to track your total income for a month or specific time period. By combining both coaching and other profit center income, you will quickly see what your projected and actual results are for your entire business venture.

  See also Ideal Practice (Section 2.6.2) to define fees and ideal income.

## 2.6.2 Ideal Practice

This screen helps you to assess your personal goals as a coach.

- You can plan for and dream about what these goals will mean.
- Three categories allow you to focus on three important areas: clients, practice, and life.
- For each category, ask yourself about your ideals.

  For example: "What characteristics would an ideal client have?"

  Or you might ask: "In an ideal practice, how many weeks of coaching would I do?"

1. To enter information in each profile area, use the text box for each.
2. To enter a Client Comment, Practice Comment, or Life Comment use the multiline text box.

## 2.6.3 Action Plan

This screen provides a place to record your daily plan for marketing and expanding your practice.

- You can customize (Section 2.9.3) your Action Plan and lay out specific goals you hope to accomplish.
- To view activity on your Action Plan for a previous date, click a date from the list
- To begin a new record of activity on your Action Plan, click Add. Then use the dropdown calendar to select a new date.
- To enter Comments regarding activities in your Action Plan use the data grid.

## 2.6.4 Coach Training

This screen allows you to record the dates and descriptions of coach training opportunities in which you have participated.

- These may include classes, workshops, conferences, and online training.
- To record Course Name, Start Date, End Date, School, Description, Type, and Instructor, use the data grid.

## 2.6.5 Coach Mentoring

This screen allows you to keep track of any mentors who may be helping you build your practice and expertise.

- It will give you an overview of when the coaching occurred, who your mentors were, how to contact them, and how much time you have spent being mentored.
- To enter Start Date, End Date, Mentor Name, Contact Info, and Total Hours, use the data grid.

## 2.7 Billing

The Billing group screens give you a variety of ways to manage the billing and collection area of your coaching business.

These include:

- Viewing a billing history report
- Creating, editing, sending, and printing invoices
- Billing a client's credit card for your services
- A record of your use of Client Coaching Hours

1. To access these screens, click Billing on the Navigation Bar.
2. To begin, select the appropriate client.

### 2.7.1 Billing History and Invoices

This screen allows you to see all the invoices for a certain client, create new invoices, edit invoices, and enter payments received.

#### Editing an Invoice

1. To edit an invoice already listed for a client under Billing History, click anywhere on that given line in the data grid and then click Edit Invoice.
2. To make a change in Invoice Date, use the dropdown calendar.
3. To enter Quantity use the data grid.  Quantity indicates the number of hours or items for which you are charging (i.e., 1.5 hours, 1 training manual).
4. To enter Description, use the data grid.  Description notes what the item is (i.e., coaching time for a given date, training manual).
5. To enter Unit Rate use the data grid.  Unit Rate is the amount charged per quantity indicated.
6. Total multiplies the quantity by the Unit Rate.  The Total column indicates the total charge for that entry.
7. Click Taxable if the entry is subject to tax.
8. To return to the main billing screen, click on Billing History on the Navigation Bar.
9. Subtotal, tax, and total due for each invoice will appear in the boxes near the bottom of the screen.
10. You can also sort (Section 1.6.2) the columns for Quantity, Unit Rate, Description, and Total.

#### Creating a New Invoice

1. To create a new invoice, click on the New Invoice button.
2. To enter new information, use the data grid.
3. To make additional comments regarding the invoice, click the Comment field at the bottom of the screen and enter your remarks.  These remarks will appear on the finished invoice for your client to read.
4. To cancel work on an invoice, click Cancel on the Action Bar at the bottom.  You will return to the

Client Compass™ Home screen.

5. To return to the main billing screen, click Billing History on the Navigation Bar.
6. Subtotal, tax, and total due for each invoice will appear in the boxes near the bottom of the screen.
7. You can also sort (Section 1.6.2) the columns for Invoice, Number, Date, Date Paid, Amount Paid, Amount Due, Total Invoiced, or Billing Notes.

#### Previewing and Printing an Invoice

1. To see a preview of an invoice, click the beginning of the appropriate line.
2. From the Preview screen, you can print and email invoices.

#### Duplicating an Invoice

1. To duplicate an invoice, select an invoice line.
2. Click Duplicate.

#### Customizing Your Invoices

1. To customize your invoice to include your business name and logo, special graphics, or other personal touches, use the Reports Editor (Section 2.8.1).

#### Recording a Payment Made by Cash or Check

1. To record a payment made by cash or check, click on Billing History.
2. Select the appropriate invoice.
3. Use the dropdown calendar to enter Date Paid.
4. Enter the payment amount under Amount Paid.
5. Click the Amount Due column of the grid to apply the payment and see the new balance due.

#### Billing and Receiving a Credit Card Payment

See Credit Card Billing (Section 2.7.2)

### 2.7.2 Credit Card Billing

This screen allows you to manage the use of credit card billing with your clients.

#### Setting Up Credit Card Billing

1. To use credit cards as a billing option for your clients, you will need to set up a merchant account. Contact your bank for more information or check a website like www.AuthorizeNet.com (http://www.authorizenet.com/) or www.practicepaysolutions.com (http://www.practicepaysolutions.com/).
2. Once you have established a merchant account, you will have the necessary information to bill your clients by credit card through Client Compass™.
3. To set up your account in Client Compass™, click Merchant Setup and enter the Login ID and Password you received from your bank or other account institution.

#### Submitting Credit Card Charges

1. To bill a client’s credit card, click Billing.
2. Click Credit Card Billing.
3. Click Account Settings to enter or confirm the Login Name and Transaction Key for your merchant account. This enables a virtual terminal that permits credit card charges to be processed and credited

against existing client invoices.

4. Verify the client name and information at the top of the screen.
5. Click the Bill Credit Card button. The dialog screen will ask you to enter the credit card number and its expiration date (mmyy).
6. Enter the Amount of the charge.
7. click Submit Charge.
8. To exit this dialog screen, click Cancel.
9. The Current Balance Due (total of all invoices for the selected client) is shown at the bottom of your screen.
10. The amount you enter and submit under Bill Credit Card will be deducted from the Current Balance Due, beginning with the oldest unpaid invoice for that client.
11. Click the Billing History screen to see a record of the transaction and new account balance.

#### Refunding Credit Card Charges

1. To make a refund to a client's credit card, click Billing.
2. Click Credit Card billing.
3. To make a credit card refund to a client, verify the client name and information at the top of the screen and select a transaction from the grid.
4. click Process Refund. The dialog screen will as you to confirm your desire to make a refund. ("Are you sure you want to refund the selected transaction?").
5. Click Yes and the refund will automatically be processed.
6. Click No to cancel the refund process.

## 2.8 Reports

The Reports group screens give you several useful tools for preparing and printing reports in Client Compass™.

These include:

- The Reports Editor for customizing your reports
- An Address Book
- A listing of your clients' Birthdays by Month
- An Client Contact List

To access these screens click Reports on the Navigation Bar.

### 2.8.1 Report Editor

This screen gives you a listing of all the reports you can edit in Client Compass™, including the Invoice report which can be customized to reflect information regarding your practice such as a logo.

- To begin work, click the report you wish you change.
- To finish and exit a report screen, click your next choice on the Navigation Bar.

#### Editing a Report

1. To edit a report, click Edit.
2. Use the Client Compass™ Report Designer to make changes.
3. To finish, click the red X in the top right hand corner.
4. You will be asked to confirm your desire to save the changes.
5. To exit without saving changes, click Cancel.

### Previewing and Printing a Report

1. To preview a report, click the Preview button.
2. Use the Preview Toolbar to help you view and print the report.

### Duplicating a Report

1. To duplicate a report, click Properties.
2. Click Duplicate.

### Adding a Custom Report

1. To Add a report, click Add.
2. You will be brought to the Report Properties dialog box.
3. Enter the Report Name using the text box.
4. Select the Report Data by using the dropdown list.
5. To Duplicate the report, click Duplicate.
6. Click OK to be brought to the Report Designer.

### Changing Report Properties

1. To make changes to custom reports, click Properties.
2. You will be brought to the Report Properties dialog box.
3. To make changes to the Report Name use the text box.
4. To make changes to the Report Data use the dropdown list.
5. Click OK to finish.

### For more advanced users only: Using the Select Statement (SQL)

1. Click Add.
2. Use the multiline text box to enter a description of specific data.
3. To explore having custom reports developed, contact PEC Technologies at www.pectechnologies.com (http://www.pectechnologies.com/) or email clientcompass@pectechnologies.com.

For more information regarding editing reports and creating custom reports please visit http://www.clientcompass.com (http://www.clientcompass.com/)

## 2.8.2 Preview Toolbar

Several screens in Reports make use of the Preview Toolbar at the top of the Preview screen:

- To search for a specific person's name or for a certain word, click the Search button.
- To use the hand tool, click the Hand Tool button. Then click and drag the hand to move up and down through your report.
- To print a report with options to change layout, paper quality, and page numbers, click the Print button.
- To print a report and send it directly to your printer, click the Print Direct button.
- To make changes to the layout of a report page (paper size and source, orientation, and margins) click the Page Setup button.
- To zoom in and out of your report, use the Magnifier, Zoom In, Zoom Out, and Zoom buttons.
- To move quickly between pages, use the gray left and right arrows.

- To show several pages of a report at one time, click the Multiple Pages button.
- To change the background color of your report document, click the Background button.
- To add a watermark to your report, click the Watermark button and follow the prompts.
- To export a report, use the dropdown list to select the document type, then click the Export Document button.
- To email a report, use the dropdown list to select the document type, then click the email button. You will go directly into Outlook with the report attached.

### 2.8.3 Address Book

This screen gives you an alphabetical listing of key information by client.

- Each client entry includes contact information (address, phone, email) as well as Title, Company, and Notes from the Client Intake screen.
- Use the Scroll Bar or Hand Tool to move through your Address Book.
- Use the Preview Toolbar (Section 2.8.2) for other options.

### 2.8.4 Birthdays by Month

This screen is a listing of all client birthdays by month, beginning with the current month.

- A quick glance at this screen will help you to remember client's birthdays with a note or e-card.
- Notice that the current month is displayed at the top of the list; the rest follow chronologically.
- Use the Scroll Bar or Hand Tool to move through this report.
- Use the Preview Toolbar (Section 2.8.2) for other options.

### 2.8.5 Coaching Hours

This screen allows you to track how you are spending your coaching time across your practice.

- The report provides an alphabetical listing of clients by last name, including Date and Time of Services, Billable Hours, Nonbillable Hours, and Grand Total Hours.
- The Total Hours and Notes come from entries you make on the Coach Call Event screen.
- Use the Scroll Bar or Hand Tool to move through this report.
- Use the Preview Toolbar (Section 2.8.2) for other options.

### 2.8.6 Contact List

This screen provides a handy, alphabetical, line-item list of all your clients with their addresses and home phone numbers.

- Use the Scroll Bar or Hand Tool to move through your Client Contact List.
- Use the Preview Toolbar (Section 2.8.2) for other options.

### 2.8.7 Coaching Hours--ICF

This screen allows you to see all of your Coaching Hours for a certain time period.

1. When you click Coaching Hours - ICF, a Report Date Filter dialog box will appear.
2. Enter the dates in the text box useing the dropdown calendar or with the keyboard.
3. Click OK to confirm the Date Range, and the report will appear.
4. Use the Scroll Bar or Hand Tool to move through the Coaching Hours report.
5. Use the Preview Toolbar (Section 2.8.2) for other options.

### 2.8.8 Invoices by Date

This screen allows you to see all Invoices for a certain time period.

1. When you click Invoices by Date, a Report Date Filter dialog box will appear.
2. Enter the dates in the text box using the dropdown calendar or with the keyboard.
3. Click OK to confirm the Date Range, and the report will appear.
4. Use the Scroll Bar or Hand Tool to move through the Invoices by Date report.
5. Use the Preview Toolbar (Section 2.8.2) for other options.

### 2.8.9

## 2.9 Tools

The Tools group screens allow you to work with or customize a variety of Client Compass™ options.

- Screen Labels (Section 2.9.5)
- Data Files
- dropdown list
- Shortcut Bars
- Settings for the Home Page, Tax Rate, Coach Name, and Outlook Integration.

To access these screens click Tools on the Navigation Bar.

### 2.9.1 Settings

This screen allows you to change several Client Compass™ settings.

Changing Home Page Settings

- To turn on and off the Quick Links setting, click the check box.
- To change the number of clients shown on the Home Page, click the up and down arrows to increase or decrease the number or enter a new number with the keyboard after clicking in the text box. The maximum number is 10.
- To change the number of Upcoming Events shown on the Home Page, click the up and down arrows to increase or decrease the number or enter a new number with the keyboard after clicking in the text box. The maximum number is 10.
- To change the days past due for Invoices to appear on the Home Page, click the up and down arrows to increase or decrease the number or enter a new number with the keyboard after clicking in the text box.

Changing the Default Tax Rate

- To change the Default Tax Rate for Invoices in the Billing group, click the up and down arrows to increase or decrease the number or enter a new number with the keyboard after clicking in the text box.

#### Entering Coach Information

- To enter your name or the name of your company to appear on invoices and other reports, use the text box here.

#### Integrating with Microsoft Outlook

1. To save all Coaching Events from the Coach Call group and Calendar to your Outlook Calendar as well, click the check box.
2. To bring names into Client Compass™ from Outlook, click Import Clients from Outlook.
3. To send client names from Client Compass™ contacts you have made to Microsoft Outlook, click Export Clients to Outlook.
4. A dialog box will prompt you to select the clients you wish to export by clicking the appropriate check box.
5. Click Export or Cancel to finish.

### 2.9.2 Data File

The screen offers several options for saving and managing your Client Compass™ files.

#### Backing Up Your Database

1. To backup your Client Compass™ data, click Backup Now.
2. A dialog box will prompt you to give the file a name and choose a location in which to backup the file.
3. To automatically backup data file on exit, click the check box.
4. Use the dropdown list to select the number of backups to keep.
5. Browse your desktop to choose the Backup Folder.

#### Importing data from earlier version

You can import data from Client Compass™ 3.7 or 3.8 into the current database. This process will only add new clients and will not update existing data.

1. Click Import Data from an Earlier Version.
2. A dialog screen will appear, asking you to Browse your desktop for an earlier version, then select the option to overwrite certain data.
3. Click the Import button when you are ready to import or close the dialog box by clicking the red X in the top corner.

#### Compacting and Repairing Data

1. To compact and repair data, click Compact/Repair Data.
2. A dialog screen will appear, asking you to confirm your desire to compact and repair the current data file.
3. Click Yes or No.

#### Removing and Applying the Database Password

The database password is ClientCompass4.

1. To remove the database password, click Remove Database Password.

2. To apply the database password. click Apply Password to Database.

The current data file is listed at the bottom of your screen.

### 2.9.3 Dropdown Lists

This screen allows you to customize the contents of many dropdown lists throughout Client Compass™, including:

- Action Plan Item
- Assessments
- Client Checklist
- Client Type
- Comment Option
- Marital Status
- Payment Method
- Program
- Projection Area
- Session Frequency
- Stress Rating
- Weekday of Session

1. Click the dropdown list you wish to customize.
2. Click on a line in the Text column to edit the text.
3. Click a line in Display Order to edit the order number.
4. Click the Text heading or Display Order heading to sort in ascending or descending order.

### 2.9.4 Shortcut Bar

This screen allows you to customize the settings on the Shortcut Bar to streamline your work in Client Compass™.

- Add frequently used screens to the Shortcut Bar for easy access.

#### Using the Add Client Button

- The Add Client button appears on the Shortcut Bar when you first begin work with Client Compass™.
- This button is not permanent and may be removed by using the Deleting Shortcuts process.

#### Adding New Shortcuts

1. Click an item from the Available Shortcuts list, then click Add.
2. Use the Move Up and Move Down buttons to determine where you would like the new item to be placed on the Shortcut Bar.
3. Click OK to add the item to the Shortcut Bar.

4. Click Cancel or press the ESC button on your keyboard to cancel the addition instead.

Deleting Shortcuts

1. Click the item you wish to remove from the Selected Shortcuts list.
2. Click Remove, then OK. The item will be removed from the Shortcut Bar.
3. Click Cancel or press the ESC button on your keyboard to cancel the deletion process.

### 2.9.5 Screen Labels

You can change Screen Labels, which are any text appearing as a label in the gray area of a screen by a data entry field.

Customizing Screen Labels

1. Click Screen Labels in the Tools group on the Navigation Bar.
2. To choose the screen name on which you wish to make changes use the dropdown list.
3. You will then see two columns, the first showing the text in use in Client Compass™ (original text) and the second providing space for you to enter the new text of your choice. To see longer lines of text hidden by the grid, hover over the text with your mouse. To enter new text, click the second column behind the appropriate original text.
4. To save your changes to Custom Text, move to the next screen or exit the program.

### 2.9.6 Coaching Forms

This screen allows you to work with Coaching Forms: the Client Info Forms (corporate and personal) and the Prep Form.

Coaching Forms are Microsoft Word documents. You can customize (Section 2.9.6.1) them to meet your needs, then send (Section 2.9.6.2) them to clients for completion. Upon completion, clients can then return them to you for use in various coaching events.

Opening Forms

1. Click Open Forms Folder to go directly to the Coaching Forms Folder in Microsoft Word.
2. Double click the Form you wish to open.

Copying Original Forms

When you begin work with Client Compass™ or update to a newer version, you will want to copy original forms.

1. Click Copy Original Forms.
2. A dialog box will confirm the command to copy the original forms to a folder named Coaching Forms, within the folder in which your data file is stored.
3. Click OK to copy forms.

#### 2.9.6.1 Customizing Forms

To customize a Coaching Form:

1. Click Open Forms Folder.
2. Double click the form you wish to customize.
3. Go to the Tool Bar at the top of the screen.
4. Click Tools.
5. Click Unprotect Document. This will allow you to edit the form.
6. Type in the password clientcompass.
7. Make changes but do not delete any of the gray boxes.
8. To insert a graphic, go to the Tool Bar, then click Insert, Graphic, Clip Art and make your choice.
9. To reprotect when you are finished customizing the Form, click Tools.
10. Click Protect Document.
11. Click Form button and enter a password you will remember. (We suggest clientcompass).
12. Re-enter the password when prompted.

## 2.9.6.2 Sending Forms

There are two ways to send Coaching Forms to your clients.

- Using the Email button

  If you are working in the Coach Call group and wish to send a Client Info Form or Prep Form:

  1. Click the envelope icon by the client's email address in the Contact Info.
  2. When you come to the Outlook screen, click the paper clip icon to attach the Form to your message.
  3. Click the Form you wish to attach.
  4. Click Send when you are finished with your message.

- Using the Tools Group

  If you are working on customization within the Tools Group, you can quickly send your completed Form by using the Tool Bar at the top of the screen.

  1. Click Coaching Forms in the Tools Group on the Navigation Bar.
  2. Click Open Forms Folder.
  3. Click the Form you wish to send.
  4. Click File on the Tool Bar at the top of the screen.
  5. Click Send to, then Mail Recipient.
  6. When you come to the Outlook screen, enter the client's email address and your message.
  7. Click Send.

# 3 Technical Support

If you need technical support:

- Please contact us at 800-762-2974 (domestic) or 317-572-3994 (international) Monday through Friday from 8:00 am until 8:00 pm Eastern time.
- Visit our website at http://clientcompass.custhelp.com (http://clientcompass.custhelp.com/)

# 4 License Agreement

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