Making a Smooth Transition
Live Q&A Call Chat

Jan 12, 2023

00:18:09 Cynthia Gene | Integrative Wellbeing Coach: Good morning, friends!!! So happy to see your faces this morning <3

00:18:28 Svetlana Parilova: Hi, Cynthia! And everyone

00:19:47 Renee Matlock: I am starting to prefer the new version! glad there will be additional calls!

00:20:36 Dean Walters: Greetings from Fort Myers. We survived Hurricane Ian.

00:21:10 Lisa Christoffel - Christoffel Copywriting and Coaching: yep

00:21:21 Felix Brabander: Title?

00:21:31 Renee Blasky: The Four Agreements

00:21:42 Felix Brabander: Thanks

00:23:06 elizabethcraig: I always love Melinda's positivity!!!😍

00:25:51 Artie Vipperla PhD: Can we see a briefing sheet that lists "here are the changes in the order of what is most likely for you to use first?

00:26:27 Cynthia Gene | Integrative Wellbeing Coach: <3 thank you for taking care of us, Melinda <3

00:26:29 Susan Farling BC, Canada: @Artie great idea!

00:30:29 Susie Briscoe: hi everyone from the UK … I'm thinking it's best to bite the bullet and just get going with v4…

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00:30:33 Debbie Stine, Science & Technology Policy Academy: @Artie Agree — one of the “to do” list like at the end of the training session would be useful.

00:31:51 cestevez: Hi All, Happy New Year! I need assistance with setting up the Coaches Console. If anyone is interested, please get in touch with me @ce33124@gmail.com. Carlos Estevez

00:32:38 Fiona MacEachern: Q: Do we still have access to the modules in V4? Because I didn’t see that when I first looked at v4…

00:32:54 Kate Steinbacher: Hey there!

00:33:01 Artie Vipperla PhD: ok. How about a master briefing sheet?

00:33:06 elizabethcraig: I’m with @Susie Briscoe and am also planning to go straight to v4!

00:33:12 Marnie McNamara, Brentwood, TN: Checklist? Map for working in various parts?

00:33:24 Susie Briscoe: hey Kate - great to see you here!

00:33:26 Susan Nelson (HR Leaders Coach): Where do we find that demo?

00:33:34 Sherry Hogan English: Where is that video again - I missed it taking notes

00:33:36 Artie Vipperla PhD: ok. Good a demo and a bullet list. thanks

00:34:12 Marnie McNamara, Brentwood, TN: I don’t see any tutorials in the pop up Help/Support. Where’s the video I can’t find it

00:36:28 Dean Walters: Can you switch back, or do you have to log out and log in again?

00:36:40 Kirin P: @Carlos - I highly recommend Avital Spivak who is a wonderfully patient coach of technology and uses coaches console herself. You can reach her at avital@vitalweave.com. Please let me know you saw my response.

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00:36:49 Dean Walters: Got it thanks.

00:37:56 Debbie Stine, Science & Technology Policy Academy: So when it says “autoresponders” is that for V3 or V4?

00:38:08 Jo-Ellen Gray Into Gold Coaching: Carlos, I just sent you an email with my contact information so you can reach out to talk with my virtual assistant. He set my system up and is wonderful.

00:38:28 Chris King: QUESTION: When writing Appointment Notes during & after a coaching session, how do I add a link to a Form (e.g. a Call Strategy Form and a Post-session Recap Form), and how do I format the content into bulleted or numbered lists?

00:38:31 Julie Kennedy: I prefer the font and size in v3 is there a way to have the same font in v4.

00:39:29 Kirin P: Do we get a recording of today?

00:39:39 Doni Landefeld, Ph.D.: I submitted a few questions and it looks like several of my stuck points are “fixed” except 2: Q1: I’m not able to see total hours coached for certification reports. There’s no tally. Q2: When adding notes after a session, I’m not able to upload docs that aren’t housed in TCC. My workaround has been instead to create notes in the client log, then copy and paste to notes, though this requires an extra step. I’d love to avoid uploading the zillions of documents I send to clients as follow-up tools to avoid bombarding my console. Will there be a way to upload external docs to notes?

00:39:46 Sherry Hogan English: @Jo-Ellen please send me an email with that info also - sherry@sherryhoganenglish.com

00:40:07 Anita Dunford - Virtual Assistant: In V4, can we add additional users with permissions? E.g. so, can a VA or other assistant be added with limited access?

00:41:24 Kirin P: Jo-Ellen, I will be looking for a VA. Will you please email his contact too? - thanks! kirin@kirinparmar.com

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00:41:39 Joanne Sapers: I wanted to create a course in V4. I watched the V4 tutorial. I saw how to create the title, the word module did not show up for me to click on so I can add modules.

00:42:15 Michelle Volz: In Website > Pages in v.3, the formatting options were “sticky.” In v.4, they’re not sticky so you have to keep scrolling up to the top of your page to do formatting things. Is this the way it’s going to be…? (It’s a lot of extra scrolling to put together a web page.) Thanks.

00:43:04 Joanna Clark: Guilt-Free, Gentle Sleep Coach: Children 6 Mo-6yrs: Is there a way to have templates that we can use inside a client log

00:43:12 Jo-Ellen Gray Into Gold Coaching: Gotta run for next meeting, but thanks so much for this. So helpful. Have fun skiing. See you next round of live calls on V4.

00:43:37 elizabethcraig: Yes! I love uploading document attachments in the specific private client portal!

00:43:53 Patricia Keel: Where are forms and opt ins that were under WEBSITE in V3

00:44:03 Mary O'Sullivan, PCC: Can I upload my own client coaching agreements rather than use the one that comes with the Coaches Console?

00:44:17 Joanna Clark: Guilt-Free, Gentle Sleep Coach: Children 6 Mo-6yrs: also, how do we train clients to use the new version…so when we they log in are they logging into the new version

00:45:43 cestevez: Thanks, Jo-Ellen and Kirin. I appreciate it.

00:46:21 elizabethcraig: Fantastic question @Dean Walters!!! Thank you!!!

00:46:31 Patricia Keel: Never mind my question. I was missing the MENU button on the left. Found it under content

00:46:38 Chris King: QUESTION: When writing Appointment Notes during & after a coaching session, how do I add a link to a Form (e.g. a Call Strategy Form and

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a Post-session Recap Form), and how do I format the content into bulleted or numbered lists? (In v3 I think there were a lot more formatting options?)

00:46:49 Artie Vipperla PhD: And why are all the fonts so much smaller? Any way to add a built in zoom-out feature in CBS for those of us already using max magnifying reading glasses?

00:47:19 Tracy Fitzpatrick: Is there a way to set settings to usually see only ACTIVE CLIENTS every time I click on clients?

00:47:52 Joanne Sapers: The word Module never popped up

00:48:47 Anita Dunford - Virtual Assistant: Will V4 allow us to add/embed videos for courses?

00:49:29 Joanne Sapers: Thank you!

00:49:39 Cosmin Costin: @Artie -regarding font size, in any browser if you click CTRL + or CMD + , that will make everything larger like a zoom in

00:49:51 Janine Harris: In V3 pages, emails, products are hyperlinked - meaning you can click directly one the element without having to go to the dropdown list and choose "edit". I am not seeing this in V4. This is a big timesaver!

00:50:25 Cosmin Costin: @Janine - yes, we'll make those links

00:51:22 Svetlana Parilova: It would be great to be able to add a course start date and be able to allow "dripping" of the material start from that date. So you could have people sign up to a course at different dates and then start the program on the same date - the course starting date. Is this something that is being considered? Thank you

00:51:23 Doni Landefeld, Ph.D.: For Steph, Cosmin et al: 1.) I just checked again on total hours for cert report and figured out the snafu is going back more than one year, then there's no total. 2.) And in v3, if I click on the little note icon beside an appt for a client's name, I'm able to upload an external document that is not housed in the console - guess I got spoiled by this feature, though would certainly love the same capability in v4

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00:51:32 Susan Farling BC, Canada: Any options for having larger fonts?

00:52:04 Cosmin Costin: @Doni - noted, we'll look into that and see what's happening

00:52:06 Debbie Stine, Science & Technology Policy Academy: @Martie Good question!

00:53:10 Janine Harris: Re: web page - we also had a bigger field to work in.

00:54:38 Doni Landefeld, Ph.D.: @Cosmin - thanks and sorry I spelled your name incorrectly!

00:56:10 Angie Krenz: Will our CBS program training materials be updated for V4?

00:56:46 josie: Will the CBS modules still be available.

00:57:03 Susan Nelson (HR Leaders Coach): When I click on my Program link (Easy Breezy Bootcamp 3.0 Portal) says "link expired"

00:58:29 Taryn Laakso: @Doni - I am with you too on needing that function in V4 for uploading an external doc when sending a note to a client after a session. I use this all time!

01:00:17 Jane Erwin: QUESTION; I have the same issue as Fiona. I took 2 bootcamp trainings, but am NOT taken to the hub, just my dashboard. I'm not sure how to proceed to transition. Should I go look at the video tutorials?

01:00:19 Svetlana Parilova: @Taryn, @Doni, are you talking about sending a Client Log Note or something else? I though Melinda just showed that in the Client Log we should be able to attach document from the computer.

01:00:33 Kate Steinbacher: Cos, I love you guys!

01:01:14 elizabethcraig: Thank you for your question @Tina Asher!!! I wanted to be able to view in v4 as I have in v3, too!

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01:01:28 Taryn Laakso: @Sveta - Note within the Appointment. I might be sending a post session note from their appointment. I capture my notes for client and then send a note to them after the appointment. I might include an external resource.

01:01:44 Anita Dunford - Virtual Assistant: Q: Will V4 be more responsive, as I currently have to set images at 520 wide to avoid a messy display on mobile devices?

01:02:11 Doni Landefeld, Ph.D.: @Sveta - talking about working in client notes after a session. In v3, you can upload external docs and check the little box before sending so they copy to the client's log if so desired. Kills two birds one stone

01:02:21 Jessica Walker | @ketopaddlegirl: For Newsletters, will there be functionality to rearrange where they show up in the list on the Newsletter page?

01:05:14 Claude: How do you send an email to various groups in v4?

01:05:39 Anita Dunford - Virtual Assistant: Q: Will V4 be more responsive, as I currently have to set images at 520 wide to avoid a messy display on mobile devices?

Referring to newsletters/emails.

01:06:12 Fiona MacEachern: @Susan, yes, I also get "link expired"

01:07:47 Svetlana Parilova: Does v4 allow to create Calendar appointments with more than one person without creating a group for them? Thank you

01:08:10 Marnie McNamara, Brentwood, TN: I have another meeting, I have to leave. I'll look for the replay. Thanks for doing these trainings.

01:08:15 Cosmin Costin: @svetlana yes you can add multiple people to an appointment, even if they're not in the same group

01:09:42 Kathleen Fanning: Thanks Melinda and all - I have a lot to learn! Thankfully my wonderful VA Janine Harris is in my corner! Have to run for another call x

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01:09:44 Angie Krenz: Use the filter list

01:10:04 Kathryn Zabinski: I use that search feature all of the time, it is great. Very quick. I don't have a lag at all.

01:10:59 Svetlana Parilova: @Cosimin, thank you for allowing to add more than one person to an appointment. This is different from v3, I believe! Another questions will the Search Option be available when choosing contacts when creating emails, etc.? Thank you

01:11:45 Tina Asher: Is there a way to do a search for all "strategy calls or discovery calls" that I had for the month of February or for the year? This would be helpful for follow up for prospects that weren't quite ready to enroll

01:12:00 Doni Landefeld, Ph.D.: @Cosmin - echoing Sveta's thanks. Totally necessary to add multiple people to appts when we work with groups

01:12:47 Mary O'Sullivan, PCC: It's the same in V#.

01:12:54 Mary O'Sullivan, PCC: V3

01:13:11 Maureen M.,: In V4 is there a way to find the date that a prospect or client signed up or was entered into your system? It is available in V3.

01:15:03 Susan Nelson (HR Leaders Coach): Where can we find out when the future training calls are occurring?

01:15:25 Susie Briscoe: great call - thanks so much … have to go now… byeeeee

01:15:26 Doni Landefeld, Ph.D.: Thanks Melinda, Kate, Stephanie, Cosmic and all. It's great to see so many colleagues and friends here today!

01:15:29 Lucy Gerland: Would you please attach the chat to the recording of this call?

01:15:44 Joanna Clark: Guilt-Free, Gentle Sleep Coach: Children 6 Mo-6yrs: Thank you! so helpful! have a great day! Melinda I needed the pep talk!

01:16:06 Alena Edmondson: Thank you Melinda and team!

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01:16:11 Susan Nelson (HR Leaders Coach): Thank you!

01:16:11 Sue Trace: Thank you! Appreciate this call and future ones!

01:16:12 Kathryn Zabinski: This was so helpful. I will listen to the recording as well. I need to hear it more than once! Y'all are fantastic. Thank you!

01:16:15 Dr. Vivian: Liking version 4. Thank you

01:16:25 Angie Krenz: Deepest thanks!

01:16:25 Anita Dunford - Virtual Assistant: Thank you

01:16:29 Svetlana Parilova: Thank you! Bye!

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