

CFS Tech Tools & Platforms Resource Guide

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Calendar & Appointment Apps

Acuity Scheduling

Choose the free version of Acuity for scheduling appointments. Once you're ready to sell using this app, you'll either upgrade to the Emerging Plan or the Grow Plan.

Acuity Scheduling can be used to take one time payments and recurring payment plans. You can also use this as a low tech and low cost alternative for sales pages and order pages. You'll need the Emerging Plan to accept one time payments and you'll need the Growing Plan to create recurring payment plans.

[To learn how to use Acuity Scheduling, CLICK HERE](#)

Calendly

Choose the free version of Calendly for scheduling appointments. If you want more robust features for setting up recurring payments and sales and order pages, go with Acuity Scheduling.

[To learn how to use Calendly, CLICK HERE](#)

Danielle's Questionnaire Template

How To Edit Your Questions For Interview Calls And Sales Calls

Scroll down to see the questionnaire template.

PCP Interview Call Instructions

- Customize the questions to match your niche and PCP

- Edit your copy to make it less formal.
- Express your words to convey this is a simple cool interview- no pressure.
- See the questionnaire template below
- Optional: If you're not ready to presell on your interview calls, delete the selectivity and money qualifier questions.

PCP Sales Calls Instructions

- Customize the questions to match your niche and PCP.
- Optional: Include "course starts in a few weeks" to the "selectivity" question to create urgency and prepare your PCP to enroll on the phone.

Questionnaire Template

Do your best to narrow it down to 4 - 6 questions

(Pain Points, Challenges, Blocks- Their Point A)

What's holding you back from creating & launching your online course and growing your Instagram account? What hurdles are you running into? Tell me everything. :)

(What they've tried, What they've accomplished)

What have you tried so far to help you create & launch your course and grow your Instagram account? What results have you achieved so far?

(Their Point B)

1 year from today, ideally, what would you have liked to accomplish with your online course and Instagram account?

(Meet their expectation and deliver)

What attracted you to me? Why are you considering working with me to create & launch your course?

(Selectivity, Exclusivity, Scarcity)

I'm accepting a limited number of clients for my upcoming program. I select clients based on those I feel are an ideal fit and in the best position to do the work and get results. Cool?

(Money Qualifier)

If accepted, do you have the financial resources to support your participation?

- a. yes
- b. no
- c. not sure

Instagram Automation

IG Growth Automation

Danielle's Top Pick

Popsocial

<https://popsocial.com>

Coupon Code: COURSEFROMSCRATCH

Student Recommended IG Growth Apps

21Social

<https://www.21social.ca>

Waverly Social

<https://waverlysocial.com>

Social Bloom

<https://socialbloom.co>

We don't offer support for these apps. Contact their customer support when you need help using their service or have customer support questions.

Direct Message Automation

Instazood

Although you can automatically like, follow, unfollow, comment and post with Instazood, the main feature we like is Direct Messaging Automation. You can create direct messages and send it to all of your followers, all new followers or a custom list of followers. You can attach a post, image, or video to this message.

Once you create your message and activate it, Instazood will slowly and gradually send your DM throughout the day. It will also take a break for several hours each day to stay within Instagrams limits.

This is a nice feature to use for Carly's 30 DMs/day method. Learn more about Carly's 30 DMs/day method in the [Basics To Successfully Use TASTY Magnets Resource Guide](#)

Instazood's Direct Messaging feature is \$14.99/mo and you can also pay \$7.50 for 15 days. You can try it out for FREE for 3 days.

<https://instazood.com>

Contact their customer support when you need help using their service or have customer support questions.

Bigbangram

It looks like Bigbangram is using the same exact direct messaging technology as Instazood, except it's priced less at \$9/mo
<https://bigbangram.com>

Contact their customer support when you need help using their service or have customer support questions.

Live Session & Webinar Tools

Zoom

You're familiar with Zoom because your new student orientation and your live weekly coaching sessions are done on Zoom. From our research the Pro Plan seems to be the best fit for our students.

As of 9/2018 the Pro plan is \$14.99 per month. A good strategy is to start with the free plan and host a meeting with a friend or a fellow Course From Scratch student to get experience using Zoom.

Direct all of your customer support questions to Zoom. They have awesome support and awesome live chat support to help you in the moment.

Zoom Checklist

- Create your free zoom account
- Schedule a meeting
- Practice doing a Zoom meeting with friends or CFS students
- Practice screen shares, muting, recording the session, using comments
- Practice saving your recording to your computer
- Practice saving your recording to Zoom's cloud

- Play around with your Zoom settings and choose what works best for you
- When you're ready to use Zoom for live coaching sessions upgrade to the Pro plan

Make sure you get support from Zooms support and live chat support (we don't offer Zoom support)

Pro tip- Instead of sharing your desktop, you can share the specific screen you want to share and have another screen open with talking notes that only you can see.

<https://zoom.us>

Contact their customer support when you need help using their service or have customer support questions. Also, you can search for tutorials on how to use this app on YouTube.

Youtube

- Use your existing gmail account or create a new one for Youtube
- If you intend to use Youtube Live for your coaching sessions, search youtube for Youtube Live tutorials
- Practice doing a couple of Youtube Live sessions with friends or CFS students
- You can save your Youtube live coaching session as private and only share the link with your paid students
- If you save it as unlisted, non-paying students can view the video if your students share the video with them so keep it as private to protect your paid content

How to set YouTube Video as private

<https://support.google.com/youtube/answer/157177?co=GENIE.Platform%3DDesktop&hl=en>

Click Youtube Studio Classic drop down, follow directions to set video to private and share a private video.

<https://www.youtube.com>

Contact their customer support when you need help using their service or have customer support questions. Also, you can search for tutorials on how to use this app on YouTube.

Belive.tv

Facebook Live Broadcast & Streaming

You can use Belive.tv to broadcast live on Facebook. This includes: Live Q&As, Interviews, Talk shows and more. You can download your FB lives and repurpose these videos by putting them on Youtube or any platform you want. The best way to learn more about this app is to go to their site and check out their case studies. The best way to learn how it works is to start using the app.

- Create your free Belive.tv account
- Schedule a broadcast
- Practice doing a Belive.tv with friends or CFS students
- Practice creating an agenda, screen shares, and using screen comments (screen share feature is only available on the the Standard plan)

- Play around with your Belive settings and choose what works best for you
- If you choose to use this app for live sessions and webinars, upgrade to the Standard plan to get access to the screen share feature
- Learn how to repurpose your Belive.tv video
- Make sure you get support from Belive.tv support (we don't offer Belive.tv support)

•

Below are 14 tutorials from Belive.tv's Facebook page that will guide you step by step on how to navigate the various features and formats of BeLive! All of the links with short descriptions are posted below and can be found under the videos section of their Facebook page → click "show more" and watch now.

The Basics:

-->Talk Show Tutorial

Check out this link to learn how to start and broadcast your very own Talk Show! This feature allows you to broadcast solo to viewers for the quickest and easiest way to begin with BeLive:

<https://www.facebook.com/.../vl.95870990756.../445974802420096/...>

-->Q & A Tutorial

Check out this link to learn how to start and broadcast your very own Talk Show! This feature allows you to broadcast solo to viewers for the quickest and easiest way to begin with BeLive:

<https://www.facebook.com/.../vl.95870990756.../384635005220743/...>

-->Face to Face Tutorial

Conduct your very own interview style broadcast live with another guest! Select who you wish to invite and split screen:

<https://www.facebook.com/.../vl.95870990756.../384645035219740/...>

Additional Features:

-->Agenda Tutorial

You can create and publish an agenda with your broadcast schedule- see the link for more info!

<https://www.facebook.com/.../vl.95870990756.../392845954399648/...>

-->Deleting past broadcasts

Tired of old broadcasts cluttering your page? We are here to help!

<https://www.facebook.com/.../vl.95870990756.../385117711839139/...>

-->Scheduling a live broadcast

Keep your viewers in the loop with the ability to create and publish a schedule of your future broadcasts!

<https://www.facebook.com/.../vl.95870990756.../384647398552837/...>

-->Changing video/audio

If you wish to change something in either a Face to Face or Q & A broadcast check this tutorial out for instructions on the how to!

<https://www.facebook.com/.../vl.95870990756.../384643021886608/...>

-->Changing your privacy settings

Now when you broadcast with BeLive you can choose your preferred audience!

<https://www.facebook.com/.../vl.95870990756.../386025241748386/...>

-->Downloading live videos

Family or friend missed a broadcast? No worries! You can download and save them for later:

<https://www.facebook.com/.../vl.95870990756.../386025415081702/...>

****New Custom Branding Features****

-->Uploading a custom frame to your broadcast

With our new function you can create a custom frame around your broadcast by selecting and uploading a photo from your computer to customize your stream! Check out the link below for more details:

<https://www.facebook.com/.../vl.95870990756.../463373470680229/...>

-->How to upload a custom logo to your broadcast

Customize your brand! Include a graphic of your own choice or creation and add it to your live video:

<https://www.facebook.com/.../vl.95870990756.../463373470680229/...>

-->How to upload photos to your broadcast

Now available- photo sharing to your live stream! Select photos from your Facebook Albums or page to personalize your broadcast:

<https://www.facebook.com/.../vl.95870990756.../463396164011293/...>

-->How to add custom colours to your broadcast

It has arrived! Choose your very own color scheme to promote your brand, change it according to your broadcast topic:

<https://www.facebook.com/.../vl.95870990756.../463374350680141/...>

-->How to use the screen sharing feature

By popular demand!! You can use the screen share function in your live broadcast to show viewers your desktop screen:

<https://www.facebook.com/.../vl.95870990756.../463373890680187/...>

The tutorial links above came from Belive.tv's FB page on 9/17/2018. Check this page below to see if they've made any updates since 9/17/18

<https://www.facebook.com/BeLiveTvApp/posts/you-asked-we-answered-below-are-14-tutorials-that-will-guide-you-step-by-step-on/463800210637555/>

Here's the link to Belive.tv's youtube channel

https://www.youtube.com/channel/UC5nsRk_ZIlkTPPGjZnufxPA

Contact their customer support when you need help using their service or have customer support questions. Also, you can search for tutorials on how to use this app on YouTube.

Canva Graphics

You can use Canva for TASTY post images, slides, Facebook covers, Ebooks, infographics and so much more. The free version comes with so much that you may not need the paid version at all.

The best way to learn how to create graphics with Canva is to just get in there and start using it.

Checkout Canva's YouTube channel here <https://www.youtube.com/user/canvadesign> and you can search Youtube for specifics like "How to create an Instagram post on Canva" or "How to create a Facebook cover in Canva"

<https://www.canva.com>

Contact their customer support when you need help using their service or have customer support questions. Also, you can search for tutorials on how to use this app on YouTube.

Doodle - Coordinate Sessions & Meetings

You can use Doodle to coordinate your live coaching schedule with your customers. You can also set a time for your live coaching that's best for you and stick to this schedule.

The free version seems to be enough for most of our students. Feel free to upgrade if you want extra features.

Here's a video tutorial on how to use Doodle. <https://www.youtube.com/watch?v=B2oZqrBmjKo>
<https://doodle.com>

Contact their customer support when you need help using their service or have customer support questions.

Video Hosting

MVC Launch Tip

If you're using Google Drive, Youtube or the Facebook Group Social Learning Feature, a video hosting platform like Vimeo won't be necessary to share your videos with your customers. You can upload your videos directly to Youtube, Google Drive or your Facebook Group

Advanced Launch Tip

If you're using Teachable, Kajabi, Kartra, and similar platforms, a video hosting platform won't be necessary to share your videos with your customers. These platforms already provide video hosting.

Low Tech Video Hosting

There are many other video hosting platforms you can explore, however, we advise you to keep it low tech and low cost by using either Youtube <https://www.youtube.com> or Vimeo <https://vimeo.com/upgrade>

Contact their customer support when you need help using their service or have customer support questions. Also, you can search for tutorials on how to use this app on YouTube.

Screen Recording Apps

ScreenCastify

The #1 screen recorder for Chrome. Forget complicated screencasting software - now you can tell your story in just a couple of clicks.

Danielle uses this app to pre-record Course From Scratch lessons.

Visit their YouTube Channel for tutorials on how to use this app https://www.youtube.com/channel/UCvC7Y2nnYNfqTIJ1Xdelq_w

There's a free version and a paid version. Choose the plan that's best for you here <https://www.screencastify.com/buy/>

Contact their customer support when you need help using their service or have customer support questions. Also, you can search for tutorials on how to use this app on YouTube.

Loom

See how you can use Loom to be a better leader, build trust with your leads, close more sales, and communicate with your customers and prospects better here <https://www.useloom.com/use-cases>

As of 9/2018 Loom is totally free.

<https://www.useloom.com>

Contact their customer support when you need help using their service or have customer support questions. Also, you can search for tutorials on how to use this app on YouTube.

Course Platforms

Facebook Group Social Learning Setting

The social learning setting is a FREE low tech course platform alternative to Teachable and other high tech platforms. You can use the FB Group Social Learning setting to create units/modules.

Here's a tutorial!

<https://www.youtube.com/watch?v=KKpvzSKHGOM&t=123s>

Contact their customer support when you need help using their service or have customer support questions. Also, you can search for tutorials on how to use this app on YouTube.

Teachable + 3 Months Free For Advanced Launches

*If this is your 1st MVC, don't sign up for Teachable yet. Save your 3 months free bonus for your advanced launch!

You can build your course and share your knowledge on Teachable. You can also sell your course via Teachable as a low tech and low cost alternative to paying for a shopping cart.

Checkout their Youtube channel for tutorials

<https://www.youtube.com/channel/UCy5KDdlwas8sA-HsT0ROulA>

Contact their customer support when you need help using their service or have customer support questions.

[If you're ready to claim your 3 months Free Teachable Bonus, click here for directions.](#)

Kartra

Kartra is a feature rich all in one app that includes:

- Email list automation and campaigns
- Marketing Automation
- Shopping cart & Checkout Pages
- Course and Membership Platform
- Website builder
- Landing pages
- Video Hosting
- Helpdesk
- Affiliate tracking & JV tracking

*If this is your 1st MVC, don't sign up for Kartra yet. Save it for your advanced launch.

As of 9/2018, Kartra's pricing plans start at \$89/month (email list less than 2500 leads) for everything listed above and more.

It can truly replace just about any app needed for the features mentioned above, which means you can save money instead of paying for multiple apps. It also means everything is integrated making it easier for you to manage your business.

Checkout their Youtube channel and their blog for tutorials

<https://www.kartra.com/blog/>

<https://www.youtube.com/channel/UCvA4Pk4DFlyKBP-esjP-Ruw/videos>

Contact their customer support when you need help using their service or have customer support questions.

Kajabi

- Email Broadcast
- Marketing automation
- Shopping cart & Checkout Pages
- Course and Membership Platform
- Website builder
- Landing pages
- Video Hosting
- Quizzes and Surveys

*If this is your 1st MVC, don't sign up for Kajabi yet. Save it for your advanced launch.

As of 9/2018, Kajabi's pricing plans start at \$129/month for everything listed above.

Checkout their Youtube channel and their blog for tutorials

<https://blog.newkajabi.com>

<https://www.youtube.com/user/kajabiapp/featured>

Contact their customer support when you need help using their service or have customer support questions.

Slide Deck Apps

Here are some free and low tech apps you can use to make slides. Choose your preferred app and if you don't know which one you prefer, create a few slides in each and choose one you like.

- Google Slides & Docs
- Powerpoint (Microsoft)
- Keynote (Mac)

Search YouTube for tutorials on how to use your preferred slide deck app.

Payment & Tax Tools

Let's secure the bag! Here are several payment options you can choose to secure the bag. Below you'll learn about Paypal, Acuity Scheduling, Quickbooks, Stripe and more.

Paypal

To set up a link like Danielle's <http://paypal.me/DanielleLesliePay> watch this video <https://www.youtube.com/watch?v=JGUBNmMiHbU>

You can preset the dollar amount by adding it to end of the URL address.

You'll see this at about the 2 minute mark on the video above. See example below.

<http://paypal.me/DanielleLesliePay> vs <https://www.paypal.me/DanielleLesliePay/1997>

This link is for one time payments, not recurring payments. So if you use this for a payment plan, you'd send this link to your student at the time each payment is due by adding their payment plan amount at the end of the link in the example above.

When using this for a payment plan, send your payment reminder email several days before it's due and include the link. Then on the day the payment is due, send another email.

If you want to create an actual invoice using PayPal there's a higher charge for it and the directions are on this video https://www.youtube.com/watch?v=XNr1_4vPY5c

Contact their customer support when you need help using their service or have customer support questions. Also, you can search for tutorials on how to use this app on YouTube.

Acuity Scheduling

Choose the free version of Acuity for scheduling appointments. Once you're ready to sell using this app, you'll either upgrade to the Emerging Plan or the Grow Plan.

Acuity Scheduling can be used to take one time payments and recurring payment plans. You can also use this as a low tech and low cost alternative for sales pages and order pages. You'll need the Emerging Plan to accept one time payments and you'll need the Growing Plan to create recurring payment plans.

[To learn how to use Acuity Scheduling, CLICK HERE](#)

Quickbooks Self-employed

This is a payment tool plus more and cost \$5 - \$10 per month as of 9/2018 depending on the promotions they're running. After researching their plans, the Self-employed plan seems to be the best fit for our students.

Self-employed Features

- Track income & expenses
- Capture & organize receipts
- Estimate quarterly taxes
- Invoice & accept payments
- Run basic reports
- Track miles

If you use them to accept payments, you'll have 2 options.

1. Accept credit/debit card payments includes a 2.9% charge + \$0.25.
Takes 2-3 business days to process and hit your account.
2. Accept ETF/ACH (bank transfer) includes no charge. Takes about 5 business days to process and hit your account.

Even if you don't use them for payments, we advise you use them to stay on track with your quarterly taxes. *It's so important to track taxes quarterly when you have a WFA business. Don't get stuck and surprised with a high tax bill owed to Uncle Sam!

Click here to learn more.

<https://quickbooks.intuit.com/self-employed/>

Follow their directions to set everything up. Connect your bank account to use the invoice option to receive payments.

To access more secure payment information about your invoices, create an account here as well <https://merchantcenter.intuit.com/msc/portal/home>

*Consult a tax professional for tax advice on tracking and paying your quarterly taxes

Contact their customer support when you need help using their service or have customer support questions.

Freshbooks

This is a payment tool plus more and cost \$15 - \$25 per month as of 9/2018 depending on the plan you choose. After researching their plans, the Lite or Plus plan seems to be the best fit for our students. Plus, they have a 30 day free trial.

The Plus plan comes with a recurring payment option. Keep in mind Acuity Scheduling's Grow plan also comes with a recurring payment plan. So if you're using this in Acuity, it'd be better to go with quickbooks self-employed to save a little money.

Freshbooks Features Included in All Plans

- Customize invoices and look professional
- Accept credit cards online
- Import expenses to track spending
- Dashboards that keep your finger on the pulse
- Powerful reports with insights about your business

<https://www.freshbooks.com>

Contact their customer support when you need help using their service or have customer support questions.

Stripe

From what we've researched, Stripe is the most user friendly when using a 3rd party software app that integrates with it. For instance, Acuity Scheduling integrates with Stripe for one time payments and recurring payment plans.

However, you can process payments within Stripe without using their API or 3rd party apps. See the instructions below.

Add new customer in stripe watch this tutorial <https://www.youtube.com/watch?v=5Ax-HD08rDo>

Click on the new customer you just added then...

Add a card and or a bank account (see the buttons on the right side)

From here you have a few options

Create payment


Click create payment to quickly charge them on the card you just added. If the card is already on file, you can simply come here and click payment to instantly process a payment anytime

Create an invoice for a one time payment: Step 1

Create an invoice

To send recurring invoices, [create a subscription](#) with a product and plan.

Customer

 neefesting@gmail.com
Neef Test

Edit Select another...

Send to

Not provided

Cc

Not provided

Address

Not provided

Phone

Not provided

Invoice items

Description	Qty	Unit price	Amount
<input type="text" value="Test Invoice"/>	<input type="text" value="1"/>	<input type="text" value="\$ 1,297.00"/>	\$1,297.00
+ Add another item			
Subtotal			\$1,297.00
Discount			+ Add coupon \$0.00
Tax			+ Add tax \$0.00
Total			\$1,297.00

1- Click “create an invoice”

2- Add your description

3- Add your unit price

Create an invoice for a one time payment: Step 2

Memo

Thanks for your business!

This will appear on the invoice and receipt. 500 characters remaining

Billing

☐ Automatically charge the default payment source on file

☒ Email invoice to the customer to pay manually

Payment due

3 days after invoice is sent

Invoice payment page

☒ Include a Stripe-hosted link to an invoice payment page in the invoice email
Customers can visit this link to pay, download, and see the status of their invoice.

Accept payment with...

☒ Credit or debit card

☒ ACH credit and wire transfers

Draft saved 2 minutes ago. Delete draft

Save and close Preview **Send Invoice...**

4- Add a nice memo

5- To charge them immediately, choose “Automatically charge the default payment source on file”

6- To send them the invoice, choose “Email invoice to the customer to pay manually” and add your payment due days

7- Leave these checked if you want to accept all forms of payment

- Include a Stripe-hosted link to an invoice payment page in the invoice email
- Credit or debit card
- ACH credit and wire transfers

Create a subscription recurring payment

Create a subscription

Customer

 neeftesting@gmail.com
Neef Test

Edit

Select another...

Send to *Not provided*

Cc *Not provided*

Address *Not provided*

Phone *Not provided*

Products



Add a product next to create a subscription.

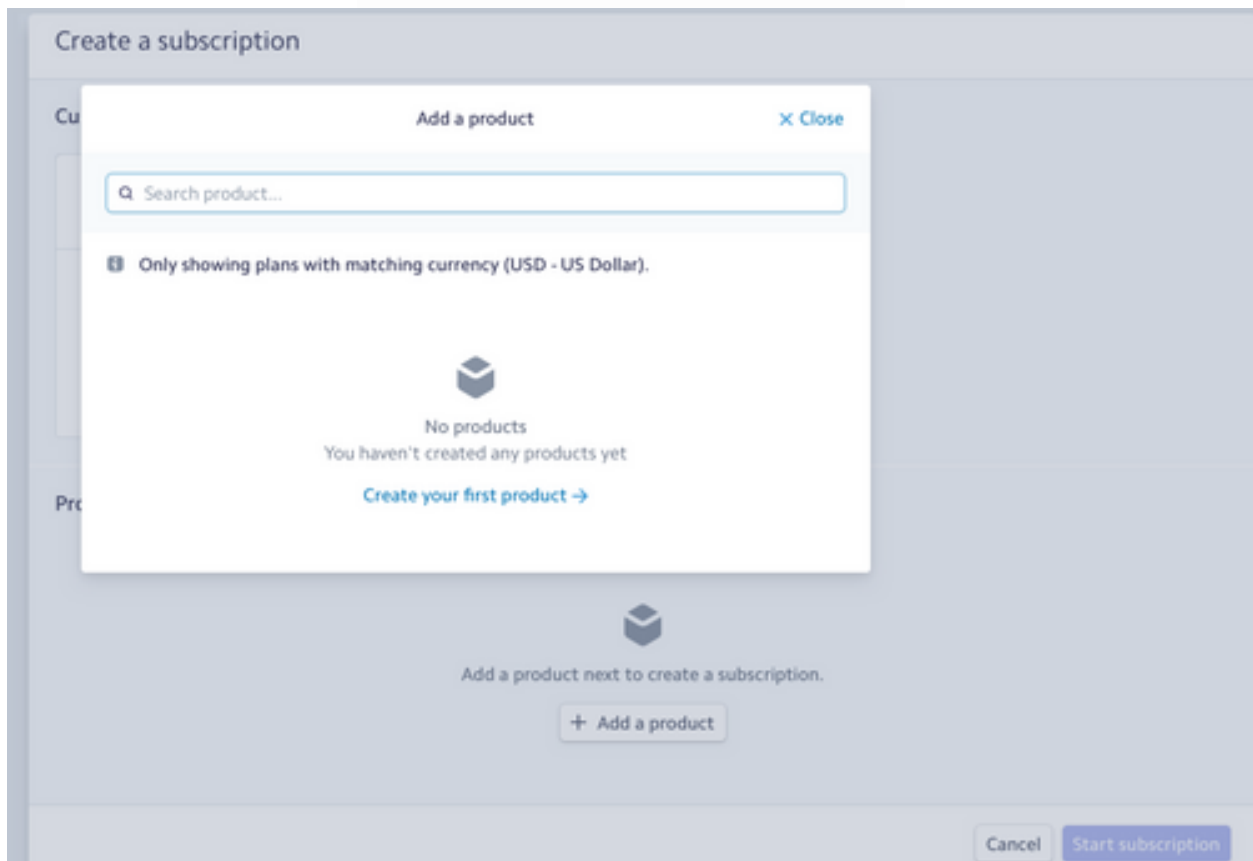
+ Add a product

Cancel

Start subscription

- Click “Create a Subscription”
- Click “Add a product”

Create Your First Product: Step 1



If you haven't created your product, click "Create your first product"

Create Your First Product: Step 2

Product > Pricing plan

Create a product

A product is something to which your customers subscribe. For example, the enterprise tier of a software product or usage of an API. You'll add plans next to define this product's pricing.

Product name
This will appear on customers' receipts and invoices.

MVC TEST

Unit label OPTIONAL
This will represent a unit of this product, such as a seat or API call, on customers' receipts and invoices.

seat

Statement descriptor OPTIONAL
This will appear on customers' bank statements, so make sure it's clearly recognizable.

MVC TEST

Cancel Create product

- Add product name
- leave unit label blank
- Add statement descriptor
- Click "Create product"

Create Your First Product: Step 3

Product > Pricing plan

Add a pricing plan for MVC TEST

Pricing plans define how customers will be billed for this product. You may want to add multiple pricing plans for this product if you sell it in multiple intervals, currencies, or other price variants.

Plan nickname

This won't be visible to customers, but will help you find this plan later.

ID OPTIONAL

This will identify this plan in the API. We recommend leaving this blank so we can generate an ID for you.

Pricing

Not sure? [Learn more.](#)

☒ **Recurring quantity**

Bill customers at the start of each period for a set quantity.
For example, seats for a SaaS product.

☐ **Metered usage**

Bill customers at the end of each period for reported usage.
For example, API calls made.

- Add plan nickname
- ID, leave blank
- Pricing, choose recurring

Create Your First Product: Step 4

The screenshot shows the Stripe pricing plan creation interface. It includes a 'Currency' dropdown set to 'USD - US Dollar'. A question 'Does this pricing plan have multiple price tiers based on quantity?' has 'No' selected. The 'Price per unit' is '\$ 648.50' and the 'Quantity' is '2', with a 'per group of' label. The 'Billing interval' is 'Monthly'. The 'Trial period' is 'OPTIONAL' with a value of '0' days. A 'Preview' section shows 'A customer subscribed to 1 unit will be billed \$648.50 at the beginning of each month.' At the bottom, there is an information icon, a note about editing the plan's nickname and trial period, and 'Cancel' and 'Add pricing plan' buttons.

Currency
USD - US Dollar

Does this pricing plan have multiple price tiers based on quantity?
☐ Yes ☒ No

Price per unit
\$ 648.50

Quantity
per group of 2

Billing interval
Monthly

Trial period **OPTIONAL**
Subscriptions to this plan will automatically start with a free trial of this length.
0 days

Preview
A customer subscribed to 1 unit will be billed \$648.50 at the beginning of each month.

You'll only be able to edit this plan's nickname and trial period after it's created.

Cancel Add pricing plan

- Choose your currency
- Choose NO for “Does this pricing plan have multiple price tiers based on quantity?”
- Add your price per unit and change ‘per unit’ to ‘per group of’
- Enter the quantity (number of) payments due for this subscription

Notice I used 648.50 per group of 2 to equal a total MVC price of \$1297. So make sure your math adds up. You can also choose a custom billing interval if you want to bill biweekly.

- Choose your billing interval. It should be based on the plan you discussed with your customer. Monthly, biweekly, weekly etc...
- Set trial period to zero
- See the preview section to make sure the recurring billing is correct
- You'll only be able to edit this plan's nickname and trial period after it's created. So if there's a mistake, just delete this and start a new one

- Click “Add pricing plan”

Example of a custom billing interval for biweekly payments

Currency
USD - US Dollar

Does this pricing plan have multiple price tiers based on quantity?
☐ Yes ☒ No

Price per unit
\$ 648.50

Quantity
per group of 2

Billing interval
Custom 2 weeks

Trial period OPTIONAL
Subscriptions to this plan will automatically start with a free trial of this length.
0 days

Preview
A customer subscribed to 1 unit will be billed \$648.50 every 2 weeks.

i You'll only be able to edit this plan's nickname and trial period after it's created.

Cancel Add pricing plan

Create Your First Product: Step 5

MVC TEST

PRODUCT

\$648.50 USD per group of 2 every 2 weeks

+ Add pricing plan

...

Details

Edit

ID	prod_DYUvPY8nzQBuyK
Created	2018/09/06 09:53
Name	MVC TEST
Statement descriptor	MVC TEST

Pricing plans

+ Add pricing plan

MVC TEST

\$648.50 USD per group of 2 every 2 weeks

2018/09/06 10:12

...

Metadata

Edit

No metadata

Once completed, your first product will look something like this. The example above is based on biweekly payments.

Add Customers to a Subscription: Step 1

Home

Payments

Balance

Customers

Radar

Billing

Connect

Orders

Developers

View test data

Business settings

Filter

+ New

Export

CUSTOMER	CARD	CREATED
neefesting@gmail.com — cus_DYU1jxagI5H7TA		
2018/09/06 09:26		

1 result

Previous

Next

Now, click on customers on the left toolbar.

neefesting@gmail.com

CUSTOMER

+ Add note

...

Customer was created

Sep 6, 9:26 AM

Details

Update details

ACCOUNT INFORMATION

BILLING INFORMATION

ID

cus_DYUTjxzgl5H7TA

Send emails to

neefesting@gmail.com

Created

2018/09/06 09:26

Billing address

None

Email

neefesting@gmail.com

Invoice prefix

3CD33AD

Description

Neef Test

VAT number

No VAT number

Metadata

Edit

No metadata

Cards

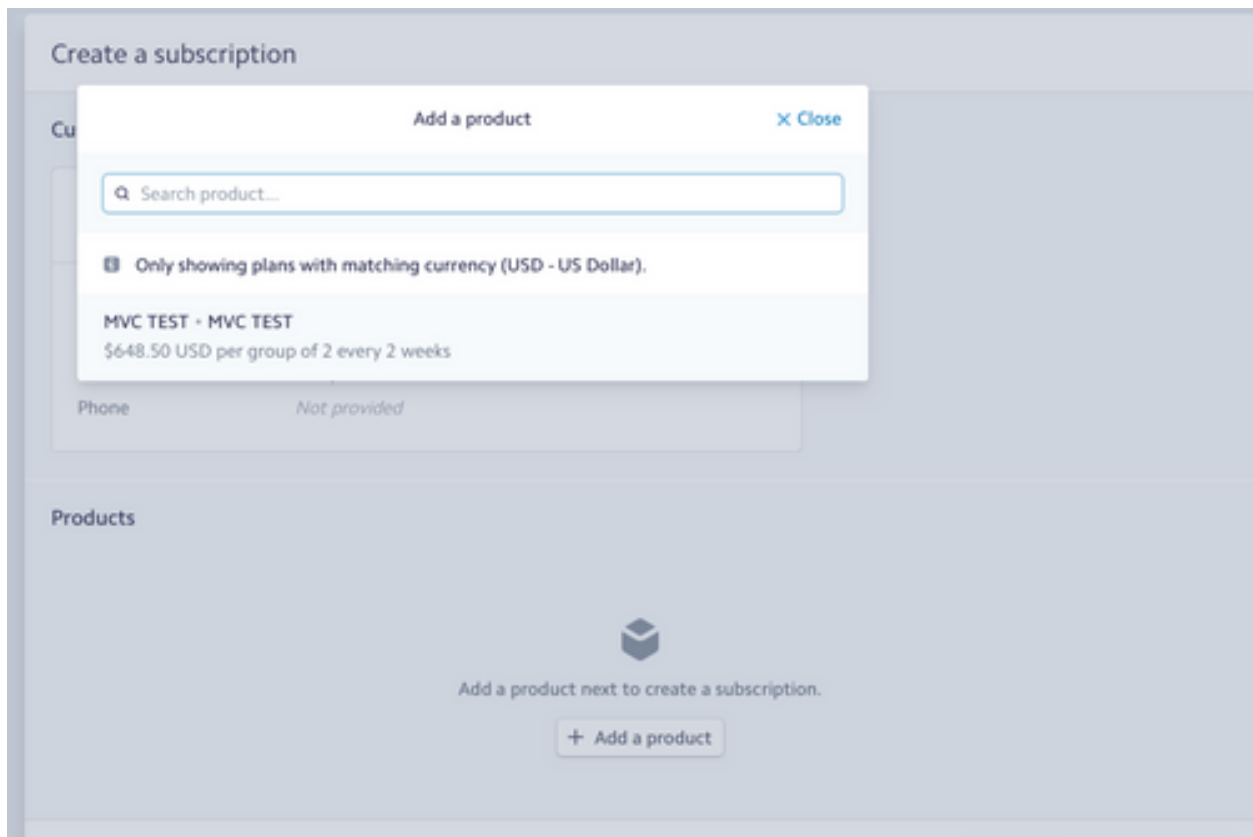
Add card

Click on your customer to get to this screen, then scroll down to "Add subscription

Add Customers to a Subscription: Step 2

No cards	
Bank accounts	+ Add bank account
No bank accounts	
Sources	
No sources	
Payments	+ Create payment
No payments	
Active subscriptions	+ Add subscription
No subscriptions found	

Click “Add subscription”



Click “Add product” and choose your product

If you got the OKAY to charge them, do this

- Leave Quantity set as 1
- Add a nice memo
- Billing method - choose “Automatically charge the default payment source on file” Make sure you’ve communicated to your customer that you’re charging them and they’ve okayed it.
- Click Start Subscription

If you DID NOT get the OKAY to charge them, choose “Email invoices to the customer to pay manually” and add your payment due days

- Leave these checked
- Include a Stripe-hosted link to an invoice payment page in the invoice email
- Credit or debit card

- ACH credit and wire transfers
- Click Start Subscription

Contact their customer support when you need help using their service or have customer support questions.

Google Drive & G Suite

Google Drive

When it comes to low tech and low to no cost apps, you can't go wrong with Google drive. There are countless possibilities for what can be done with these apps. You can create worksheets, workbooks, quizzes, charts, goal tracking docs and more for your course.

Google docs

Use this app in place of Microsoft word and Pages for Mac.

Google sheets

Use this app in place of Excel (Windows) or Numbers (Mac)

Google slides

Use this app in place of Powerpoint or Keynote

Google forms

Danielle uses a google form for pre-submitted questions for the weekly Live Q&As. You can also use Google forms for surveys, quizzes, polls and more.

G Suite

G Suite is the business version of gmail, docs, drive, and calendar. This option gives you a low cost and low tech way to have your own business email address YourEmail(at)yourcompany.com

The basic plan at \$5/mo is the plan that fits most of our students and you get to try GSuite FREE for 14 days

Find out more about G Suite features here <https://gsuite.google.com>

Contact their customer support when you need help using these services or have customer support questions.

Transcription Services

Rev Transcription Services

Rev offers transcription, caption, and translation services. You can use Rev to give your customers written notes of coaching sessions.

You can also have your recorded coaching sessions transcribed so you can repurpose this content for your next MVC. You can just about repurpose your content for anything.

<https://www.rev.com>

Contact their customer support when you need help using their service or have customer support questions.

Time and Project Management Apps

Time Tracking Apps

Harvest

The free version will be enough for most of our students. You can create one project for free and have as many tasks as you want under your one project.

<https://www.getharvest.com>

Toggl

The free basic plan will be enough for most of our students

<https://toggl.com>

Clockify

As of 9/2018, this app is totally free

<https://clockify.me>

Harvest, Toggle, and Clockify have apps you can add to your phone. Harvest, Toggle, and Clockify also have Chrome extensions you can add to your browser. If you prefer Safari or Firefox, just check the help docs from these apps to see if they're available.

Contact their customer support when you need help using these services or have customer support questions.

Project Management Tools

The FREE versions of Trello and Asana are more than enough for our students who are just starting out. Until you have team members on your team, the free versions may be enough for a while.

Search Youtube for tutorials on these so you can get an idea of which one you like. The good thing is you can try them all for free then choose the one you prefer.

Trello

<https://trello.com/>

Asana

<https://asana.com>

Contact their customer support when you need help using these services or have customer support questions.

Affiliate Apps

Acuity Scheduling Low Tech Affiliate Method

Every package you create in Acuity has a unique URL associated with it. So, you can create appointment types and package for each of your affiliate referral partners.

In this example, let's say the main title of your MVC is "Low Tech Affiliate Masters" and you have 2 referral partners named Sarah Jones and Omar Simmons.

- Appointment type for Sarah- Discovery Call (sj-1)
- Package name for Sarah - Low Tech Affiliate Masters (sj-1)
- Appointment type for Omar- Discovery Call (os-1)

- Package name for Omar - Low Tech Affiliate Masters (os-1)

This method allows you to track how many PCP calls from each affiliate. When you give your PCP the link to purchase your program, make sure you give them the correct link for your affiliate partner so you can give them credit for their percentage of the sale.

Go to the Calendar & Appointment Apps section to learn how to use Acuity Scheduling

What about other Affiliate Tracking options?

Most affiliate tracking apps are high tech and cost around \$300/mo so we don't advise using a stand alone affiliate tracking app.

If you absolutely must have one for your course, consider using Kartra because it starts at \$89/mo.

Kartra offers affiliate tracking plus:

- Email list automation and campaigns
- Marketing Automation
- Shopping cart & Checkout Pages
- Course and Membership Platform
- Website builder
- Landing pages
- Video Hosting
- Helpdesk

Recommended Readings

Money Mindset

- Secrets of the Millionaire Mind: Mastering the Inner Game of Wealth by T Harv Eker
- Rich Dad Poor Dad by Robert Kiyosaki
- Think and Grow Rich by Napoleon Hill
- Open your Mind to Receive by Catherine Ponder

Time Management, Execution & Simplifying Life

- Essentialism by Greg McKeown This is one of Danielle's fave books to help with time management, simplifying things, getting rid of mess.
- The 5-Second Rule by Mel Robbins
- Miracle Morning by Hal Elrod
- Getting Things Done: The Art of Stress Free Productivity by David Allen
- The ONE Thing by Gary W. Keller
- Atomic Habits by James Clear

Confidence/Self Esteem

- Confidence: The Entrepreneur's 30-Day Roadmap to Building Self Confidence & Overcoming Self-Doubt by Ben Gothard
- You Are a Badass®: How to Stop Doubting Your Greatness and Start Living an Awesome Life by Jen Sincero