



## How to Process a Sale at CoachVille

### *Step-by-Step For Agency Coaches*

#### BACKGROUND

When an Agency Coach has a player that is ready to purchase services, the agency coach can send the player the purchase link to pay for the purchase themselves. In order for the link to work, the player must login to CoachVille first. Or, the Agency Coach can process the sale on behalf of the player.

There are two ways the Agency Coach can process the sale on behalf of the player.

**1. Coach Already Created Account on Behalf of a Player:** If the Agency Coach previously created an account on behalf of the player, they already have the player's login and password. They can login as the player and process the sale assuming they have gathered the necessary billing and credit card information. They use the same steps as a player as outlined in "How to Pay with a Purchase Link" starting on page 12.

**2. Player Already Has an Existing Account:** If the player already has an existing account, and the Agency Coach does not have the login and password, the Agency Coach can login as themselves and use their admin access to search for the player, and then login as the player using the steps that follow.

#### STEP-BY-STEP: AGENCY COACH PROCESSES PAYMENT FOR PLAYER

Follow these steps to process a sale on behalf of a player if they already have an existing account, and you do not have their login and password information.

Administrative access must be active, so you will first login as yourself. Next, you will login as your player. These steps assume that the player already has an account created at CoachVille, and the coach has been granted Administrative access.

1. Open a browser window. Chrome or Mozilla Firefox are preferred.
2. In the browser address bar type [www.coachville.com](http://www.coachville.com).
3. Click **Member Login**.



Figure 1 Click Member Login.

4. Under **CV Members Login Here**, enter your email address and password.
5. Click Login.



Figure 2 Enter your email address and password

After logging in, your administrative access is *active*, and enables you to use the **CoachVille user lookup** function to login as the player.

6. Click the **CoachVille User Lookup** link below, or copy and paste the link in a new browser tab:

<https://www.coachville.com/acs-admin/users/>

7. In the Quick search text box, enter the player's email address, and then click **Find User**.



Figure 3 Quick Search

8. Click the desired search result. In this example, we are logging in as Mary Thomas.



Figure 4 Search Results

9. A user information page displays. Scroll to the very last item on the page under **Administrative Actions** and click **login as this user**.

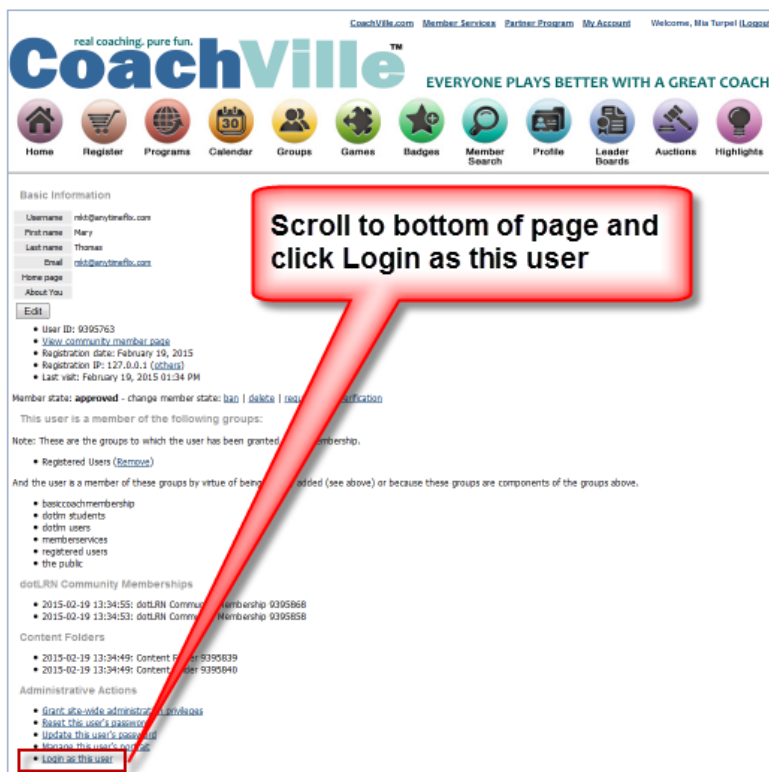


Figure 5 User information page

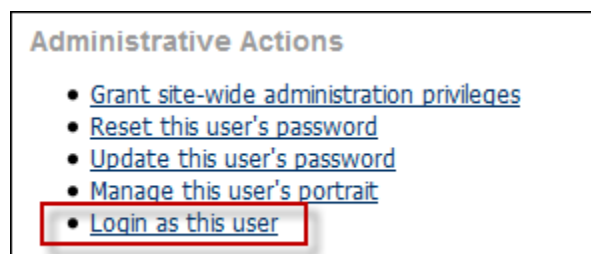


Figure 6 Login as this user link close-up

You are now logged in as this user (player), and you are viewing the player's **My Account** page.

CoachVille.com Member Services Partner Program **My Account** Welcome **Mary Thomas** (Logout)

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Home Register Programs Calendar Groups Games Badges Member Search Profile Leader Boards Auctions Highlights

**Actions**

- [Change Password](#)
- [Change Timezone](#)
- [Manage Notifications](#)
- [Edit My Profile](#)
- [Search Profiles](#)

**Credit Card Information**

- [Add or Update Credit Card](#)

**Points**

- Player Points: 0
- Bonus Points: 0
- Total Points: 0
- Available Points: 0
- [Point History](#)
- [Extra Points](#)

**Order History**

- No orders

**New Courses**

- [Click for your classes since July 2005](#)

**Partner Program**

- [How to become a partner \(pdf\)](#)
- [Become a CoachVille partner](#)

**Figure 7 Player's My Account Page**

10. Copy and paste the product link into the browser address bar and either click the browser Go arrow (circled in Figure 8) or press **ENTER** on your computer keyboard.

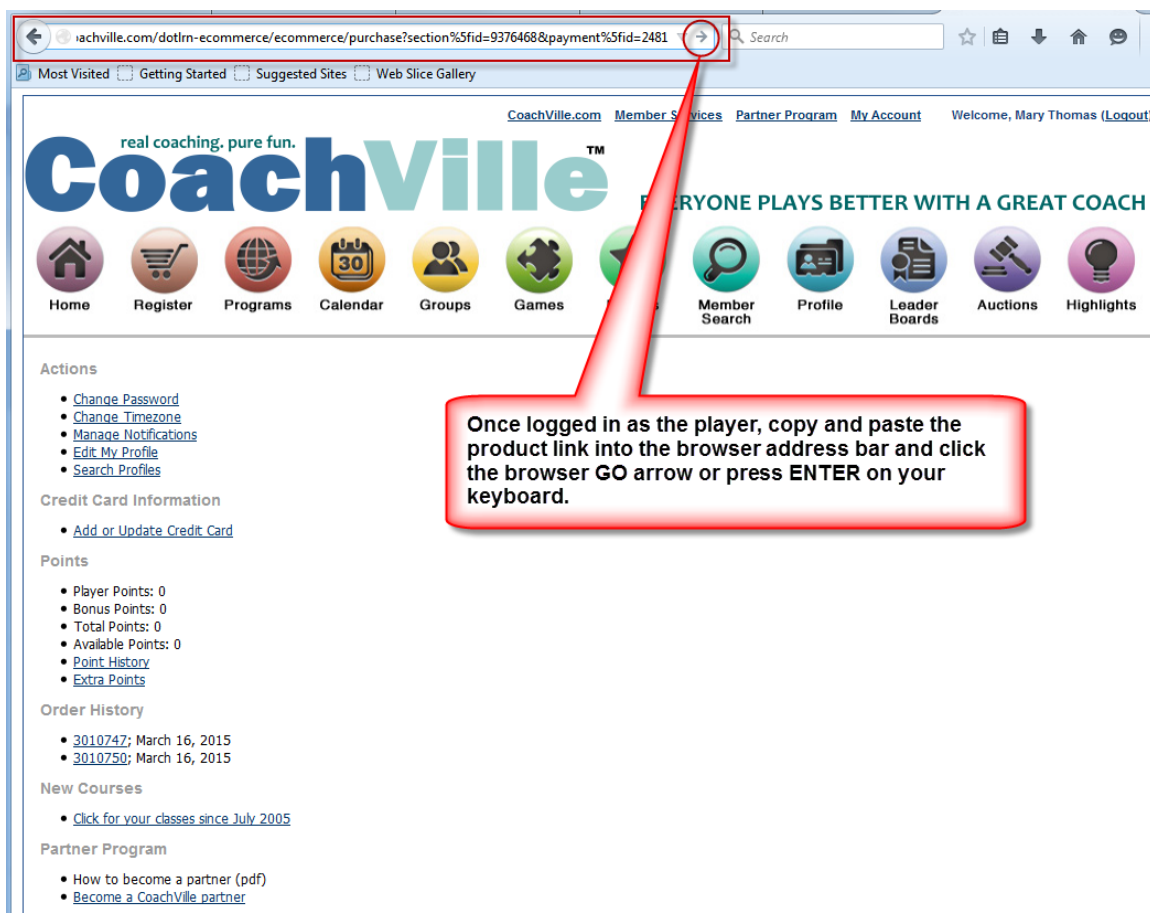




Figure 8 Copy product link into address bar


11. An Item Description displays. Click **Proceed to Checkout**.


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for Mary Thomas (if you're not Mary Thomas, [click here](#))

Item Description	Quantity	Price/Item	Action
Transformation Intensive Coaching with Deanna Stull	1	MIA: \$0.01 Installment Payments 16 April 2015 \$0.00	<a href="#">delete</a>
Total:	1	\$0.01	

[Proceed to Checkout](#)

[Purchase another Course/Section](#)

Figure 9 Item Description

12. Enter the player's **Billing Information:**
  - a. First Name
  - b. Last Name
  - c. Address
  - d. City
  - e. State/Province
  - f. Country
  - g. Check the box next to Refund Policy
13. Enter the player's **Credit Card Information:**
  - a. Credit Card Number
  - b. Type (Visa/MC/American Express/Discover/Novus)
  - c. Expires (Expiration Date)

The screenshot shows the CoachVille website interface. At the top, there's a navigation bar with links for CoachVille.com, Member Services, and Partners. Below this is the CoachVille logo with the tagline "real coaching. pure fun." and the text "EVERYONE P". A row of icons represents different site features: Home, Register, Programs, Calendar, Groups, Games, Badges, and Member Search. The main content area contains instructions to complete the order and a list of items. The "Billing Information" section includes fields for First name(s), Last Name, Address, Address line 2, City, State/Province (a dropdown menu showing "NEW YORK"), ZIP/Postal code, and Country (a dropdown menu showing "UNITED STATES"). There is also a checkbox for the Refund Policy. The "Credit card information" section includes fields for Credit card number, Type (a dropdown menu showing "VISA"), and Expires (two dropdown menus showing "05" and "2018"). An "OK" button is at the bottom of the form.

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EVERYONE P

Home Register Programs Calendar Groups Games Badges Member Search

To complete your order, submit this form, and confirm the information on the following page.

1. Please review your order list for accuracy.

[Order list](#)

- Quantity 1: Transformation Intensive Coaching with Deanna Stull; MIA \$0.01

2. Complete this information.

**Billing Information**

First name(s) \* Mary

Last Name \* Thomas

Address \* 123 Oak Street

Address line 2

City \* New York

State/Province NEW YORK

(i) For United States and Canada residents only

ZIP/Postal code 94040

Country \* UNITED STATES

Refund Policy \* ☒ I agree to the [terms and conditions](#) of this sale

**Credit card information**

Credit card number \* 4224112333218889

Type \* VISA

Expires \* 05 2018

OK


Figure 10 Billing and Credit Card Information





14. **Important:** Double-check the accuracy of the information.
15. If everything is accurate, click **OK**.
16. An order confirmation displays (Figure 11).
17. Confirm that that **all information is correct**. (If not, see **What to do if anything is incorrect** on page 10)
18. If everything is correct, click the **Submit** button, and go to step 19.


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Click  to send us your order, or click "back" on your browser to make changes.

E-mail address:  
mkt@anytimefix.com

Bill to: Mary Thomas  
123 Oak Street  
New York, NY 94040  
VISA  
xxxxxxxxxxxx8889  
exp:02/18

Courses:

- Participants 1: Transformation Intensive Coaching: Transformation Intensive Coaching with Deanna Stull; MIA: \$0.01  
Installment Payments:  
- \$0.00 on 16 April 2015

Subtotal:	\$0.01
Installment Subtotal: (charged on dates listed above)	\$0.00
Tax:	\$0.00
<hr/>	
TOTAL:	\$0.01

Paid Via: Credit Card

Click  to send us your order, or click "back" on your browser to make changes.

Figure 11 Order Confirmation Page

## What to do if anything is incorrect

- Click the browser **back** arrow (Figure 12) on your browser window until you reach the **Proceed to Checkout** page (Figure 13).
- Click the **delete** link (Figure 13) to start over. This clears the cache in the shopping cart and prevents a duplicate order.
- A message displays "Your Shopping Cart is Empty" (Figure 14). Next re-paste the purchase link in the browser window and begin again with Step 10 on page 6.

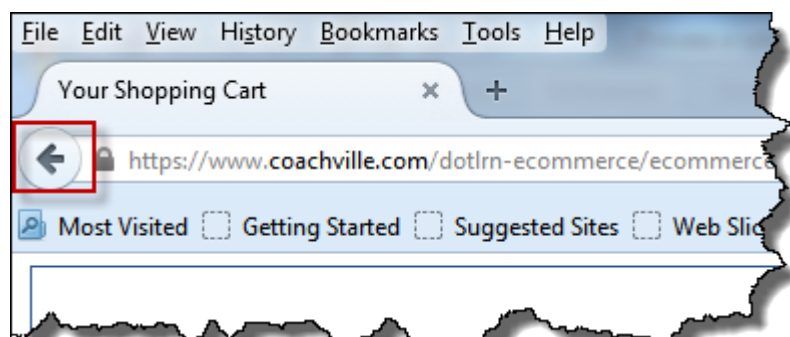


Figure 12 Browser Back Arrow

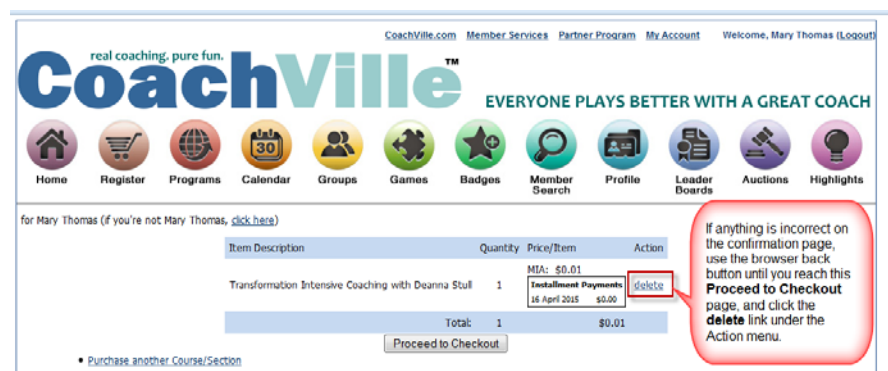


Figure 13 delete link on Proceed to Checkout page

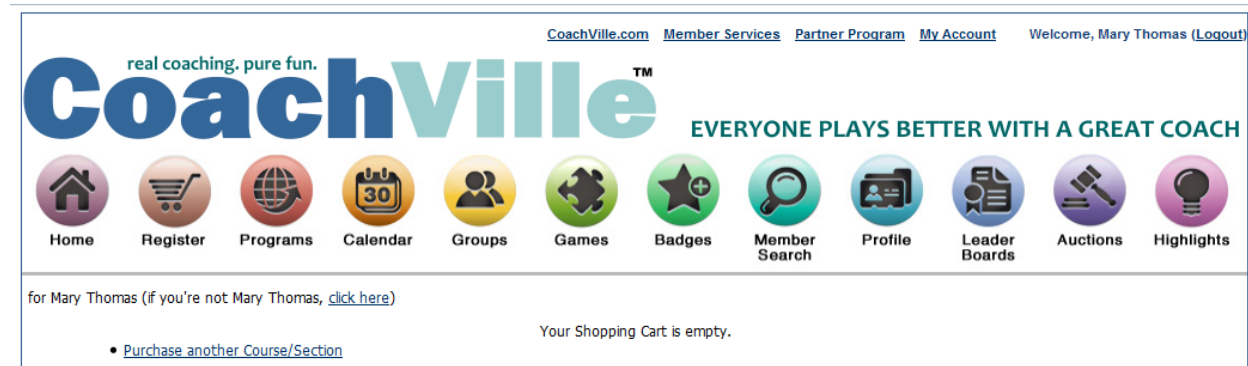


Figure 14 Your Shopping Cart is Empty message

19. After clicking the **Submit** button, a **Thank You for your registration** page displays.

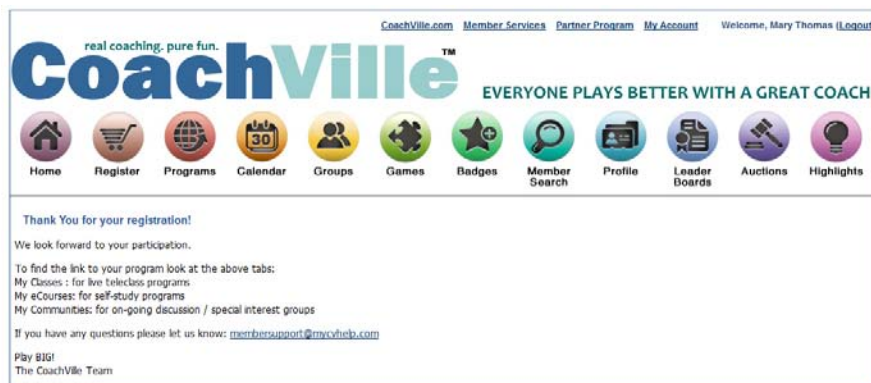


Figure 15 Thank You for your registration message.

20. Click the Programs button to view newly purchased program.



Figure 16 New purchase displays under Programs

## HOW TO PAY WITH A PURCHASE LINK

The following steps walk you through how to pay for your purchase with a purchase link provided by your Agency Coach. It requires that you Login to CoachVille.

### Login to CoachVille.com

1. Open a browser window. Chrome or Mozilla Firefox are preferred.
2. In the browser address bar type [www.coachville.com](http://www.coachville.com).
3. Click **Member Login**.



Figure 17 Click Member Login.

4. Under **CV Members Login Here**, enter your email address and password (Figure 18).
5. Click Login.



Figure 18 Enter email address and password

- Once logged in, copy and paste the purchase link provided by the Agency Coach into the browser address bar.
- Next either click the Go arrow or press **ENTER** on your computer keyboard (Figure 19).

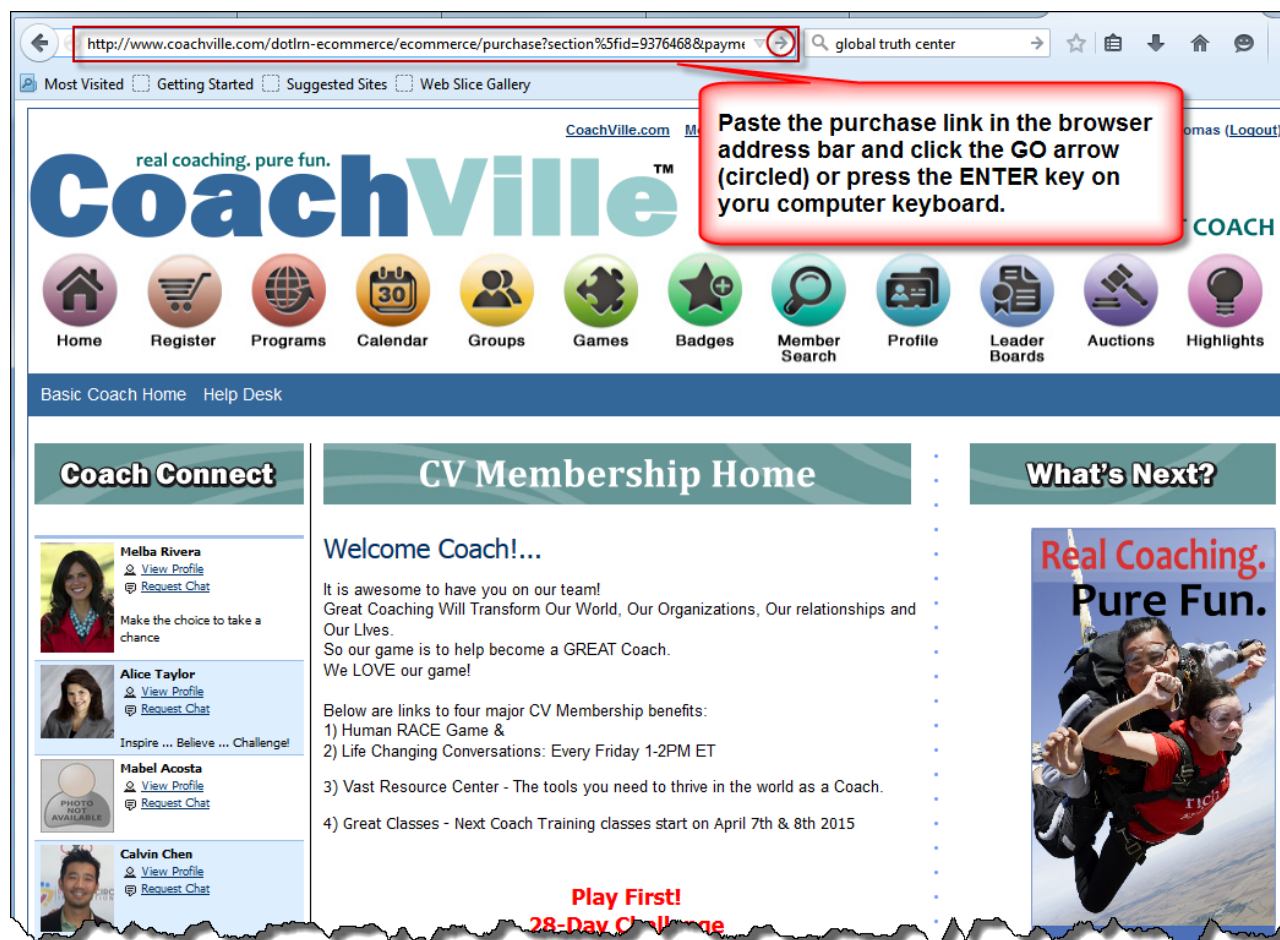




Figure 19 Paste the purchase link in the browser address bar and click the Go arrow or press ENTER

8. An Item Description displays. Click **Proceed to Checkout**.


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for Mary Thomas (if you're not Mary Thomas, [click here](#))

Item Description	Quantity	Price/Item	Action
Transformation Intensive Coaching with Deanna Stull	1	MIA: \$0.01 Installment Payments 16 April 2015 \$0.00	<a href="#">delete</a>
Total:	1	\$0.01	

[Proceed to Checkout](#)

[Purchase another Course/Section](#)

Figure 20 Item Description



9. Enter your **Billing Information:**
  - a. First Name
  - b. Last Name
  - c. Address
  - d. City
  - e. State/Province
  - f. Country
  - g. Check the box next to Refund Policy
10. Enter your **Credit Card Information:**
  - h. Credit Card Number
  - i. Type (Visa/MC/American Express/Discover/Novus)
  - j. Expires (Expiration Date)

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EVERYONE P

Home Register Programs Calendar Groups Games Badges Member Search

To complete your order, submit this form, and confirm the information on the following page.

1. Please review your order list for accuracy.

[Order list](#)

- Quantity 1: Transformation Intensive Coaching with Deanna Stull; MIA \$0.01

2. Complete this information.

**Billing Information**

First name(s) \* Mary

Last Name \* Thomas

Address \* 123 Oak Street

Address line 2

City \* New York

State/Province NEW YORK

(i) For United States and Canada residents only

ZIP/Postal code 94040

Country \* UNITED STATES

Refund Policy \* ☒ I agree to the [terms and conditions](#) of this sale

**Credit card information**

Credit card number \* 4224112333218889

Type \* VISA

Expires \* 05 2018


OK


Figure 21 Billing and Credit Card Information


11. **Important:** Double check the accuracy of the information.
12. If everything is accurate, click **OK**.
13. An order confirmation displays (Figure 22).
14. Confirm that that **all information is correct**. (If not, see What to do if anything is incorrect on page 17)
15. If everything is correct, click the **Submit** button, and go to Step 16 on page 18.


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Click  to send us your order, or click "back" on your browser to make changes.

E-mail address:  
mkt@anytimefix.com

Bill to: Mary Thomas  
123 Oak Street  
New York, NY 94040  
VISA  
xxxxxxxxxxxx8889  
exp:02/18

Courses:

- Participants 1: Transformation Intensive Coaching: Transformation Intensive Coaching with Deanna Stull; MIA: \$0.01

Installment Payments:  
- \$0.00 on 16 April 2015

Subtotal:	\$0.01
Installment Subtotal: (charged on dates listed above)	\$0.00
Tax:	\$0.00
-----	
TOTAL:	\$0.01

Paid Via: Credit Card

Click  to send us your order, or click "back" on your browser to make changes.

Figure 22 Order Confirmation Page



## What to do if anything is incorrect

- Click the browser **back** arrow (Figure 23) on your browser window until you reach the **Proceed to Checkout** page (Figure 24).
- Click the **delete** link (Figure 24) to start over. This clears the cache in the shopping cart and prevents a duplicate order.
- A message displays "Your Shopping Cart is Empty" (Figure 25). Next re-paste the purchase link in the browser window and begin again with Step 6 on page 13.

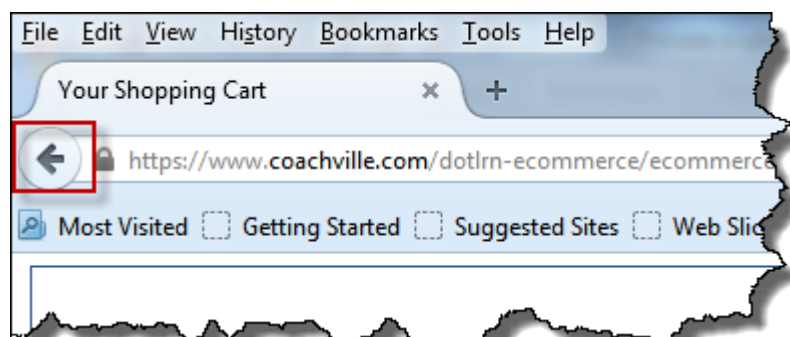


Figure 23 Browser Back Arrow

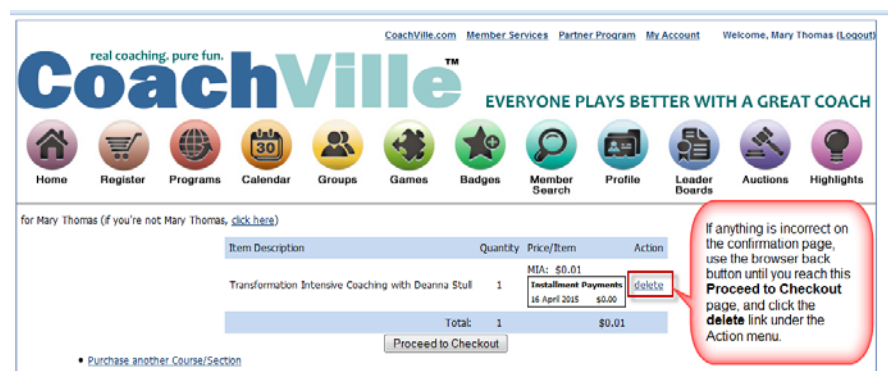


Figure 24 delete link on Proceed to Checkout page

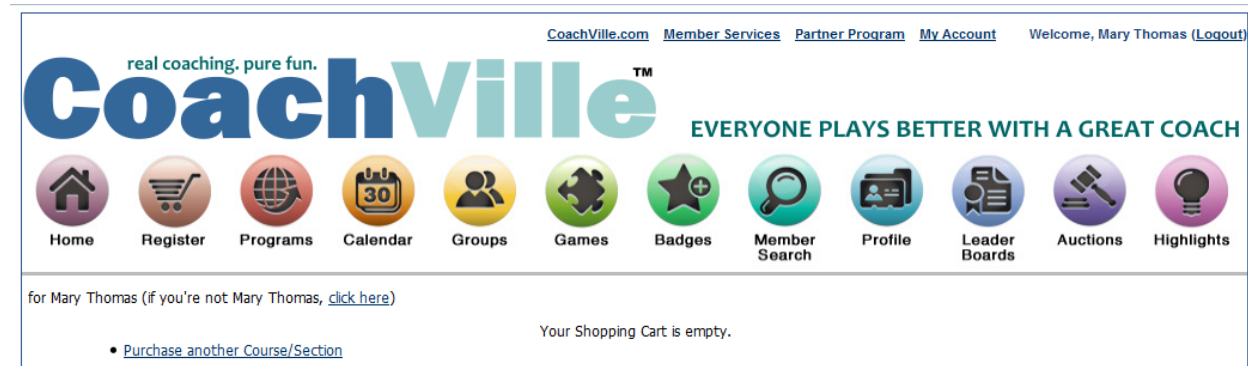


Figure 25 Your Shopping Cart is Empty message

16. After clicking the **Submit** button, a **Thank You for your registration** page displays.

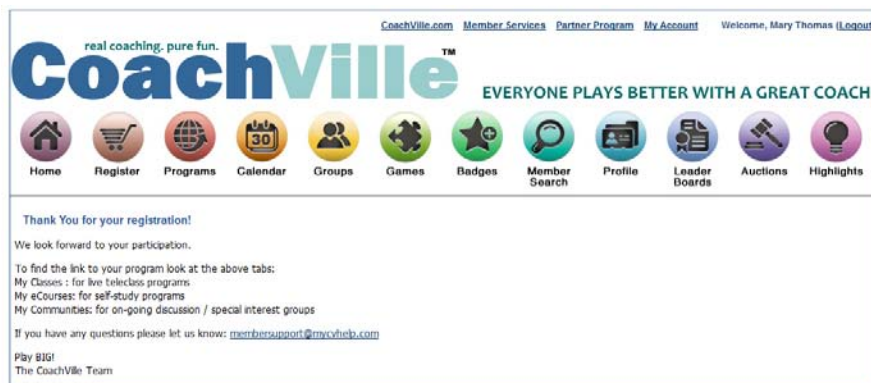


Figure 26 Thank You for your registration message.

17. Click the Programs button to view newly purchased program.

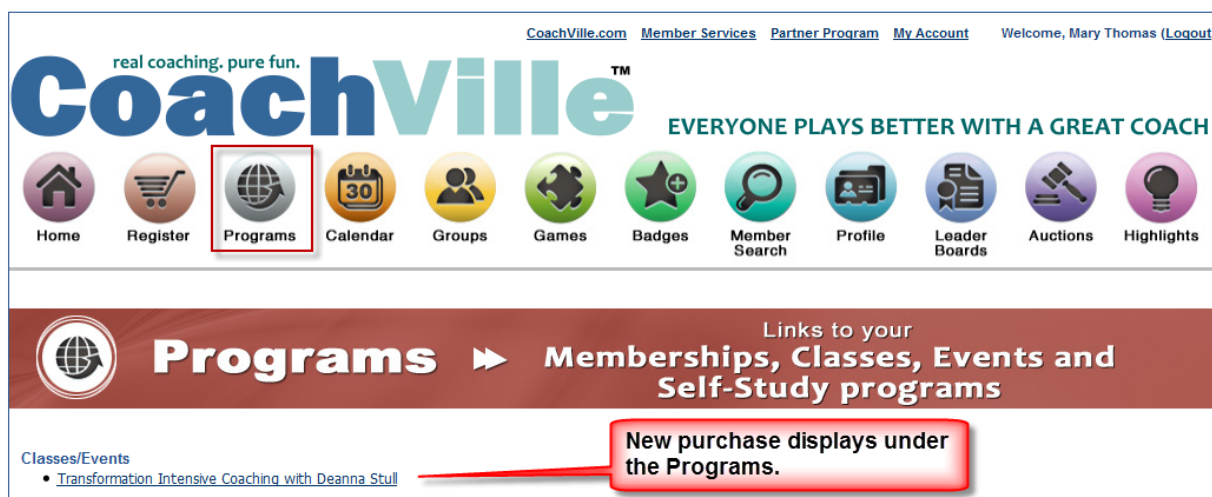


Figure 27 New purchase displays under Programs