

# Coaching Log<sup>TM</sup>

Computerised Client Management  
System For Coaches

Quick-Start User Manual



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#### DISCLAIMER.

This document is intended as an aid to assist you in your actions with regard to the set-up and use of the Coaching Log™ database version 1.4. We have made every effort to ensure the accuracy of the information contained within this document however, no liability is accepted by Leslie Posner or Pure Coaching for any real or consequential damage or loss of data or information as a result of any actions taken in conjunction with the information contained within this document.

## About this document.

### Objective.

The objective of document is to provide assistance to users regarding the installation and use of the Coaching Log™ database. To this end, graphical representations of all steps are presented with supporting textual instructions.

### Layout.

The information in this document includes [links](#) giving the reader the possibility to go directly to areas of interest.

### Getting the most from this document.

To get the most from this document, it is suggested you read through it first and get acquainted with the layout and behaviour of the links. This will assist you to easily manage the installation and launch and to find your way round more easily regarding data entry.

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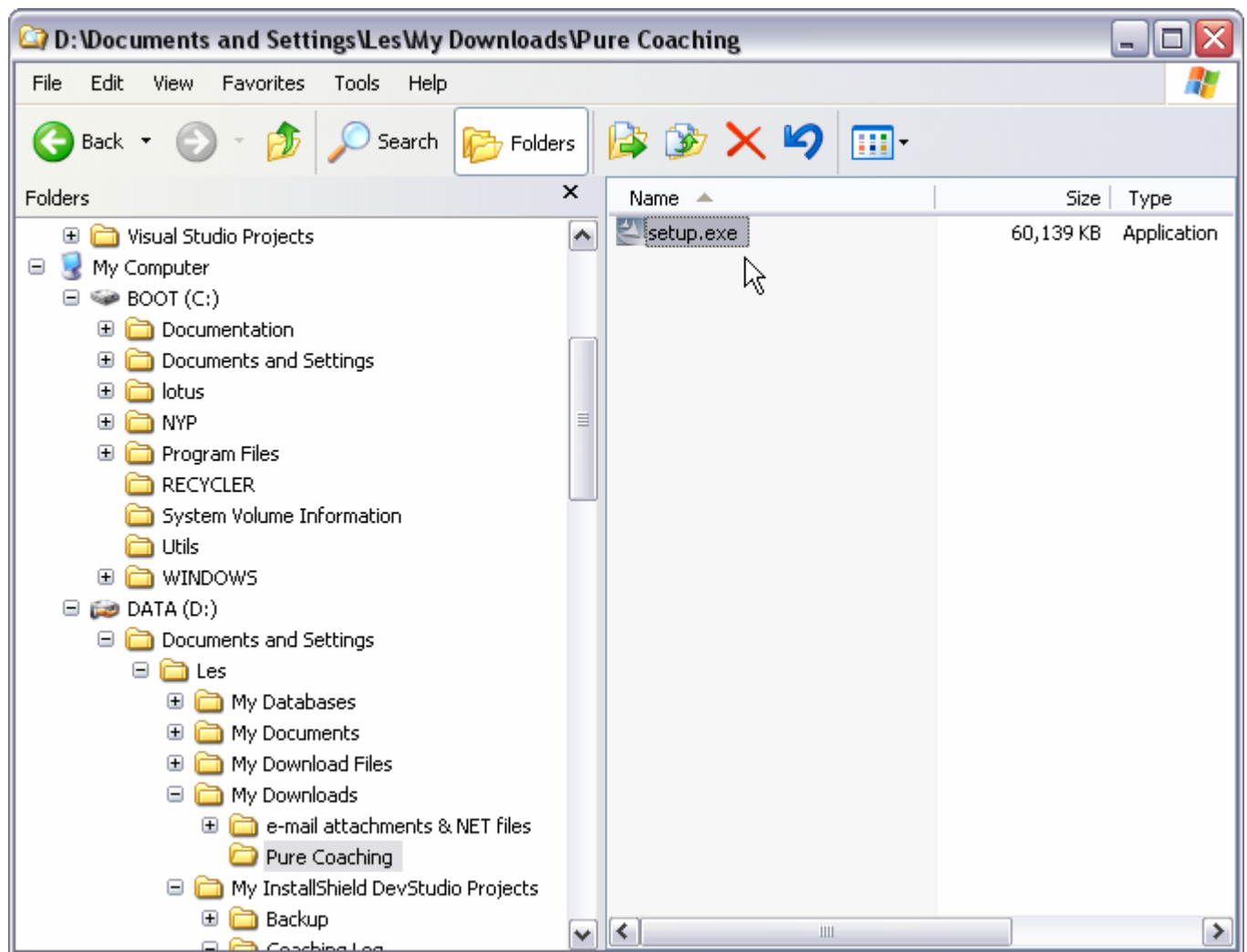
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# Installation

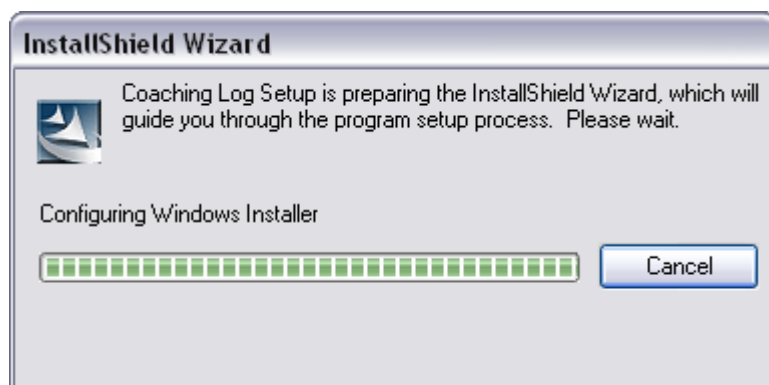
Locate the folder in which you save the downloaded setup executable.

**Note:** If you are installing from CD, locate setup.exe on the CD. All other instructions are the same.



**Double click** the icon adjacent to the filename.

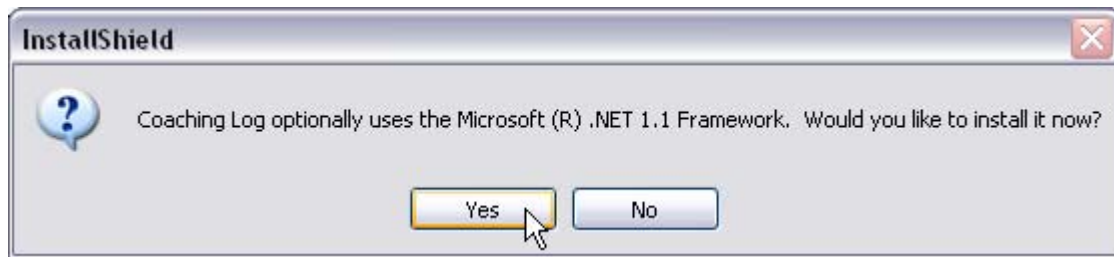
This will launch the InstallShield wizard that will guide you through the installation.



## .NET™ Framework

Coaching Log™ requires Microsoft® .NET™ 1.1 Framework.

If this is not already installed on your machine you will see this dialog box.



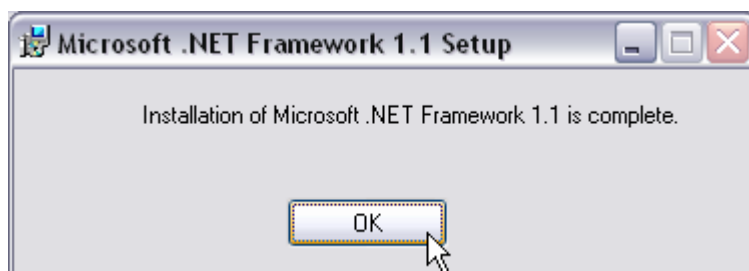
**Click Yes.**

When you see this dialog box



**click I agree** and then **click Install**.

Once .NET™ installation is complete you will see this dialog box.

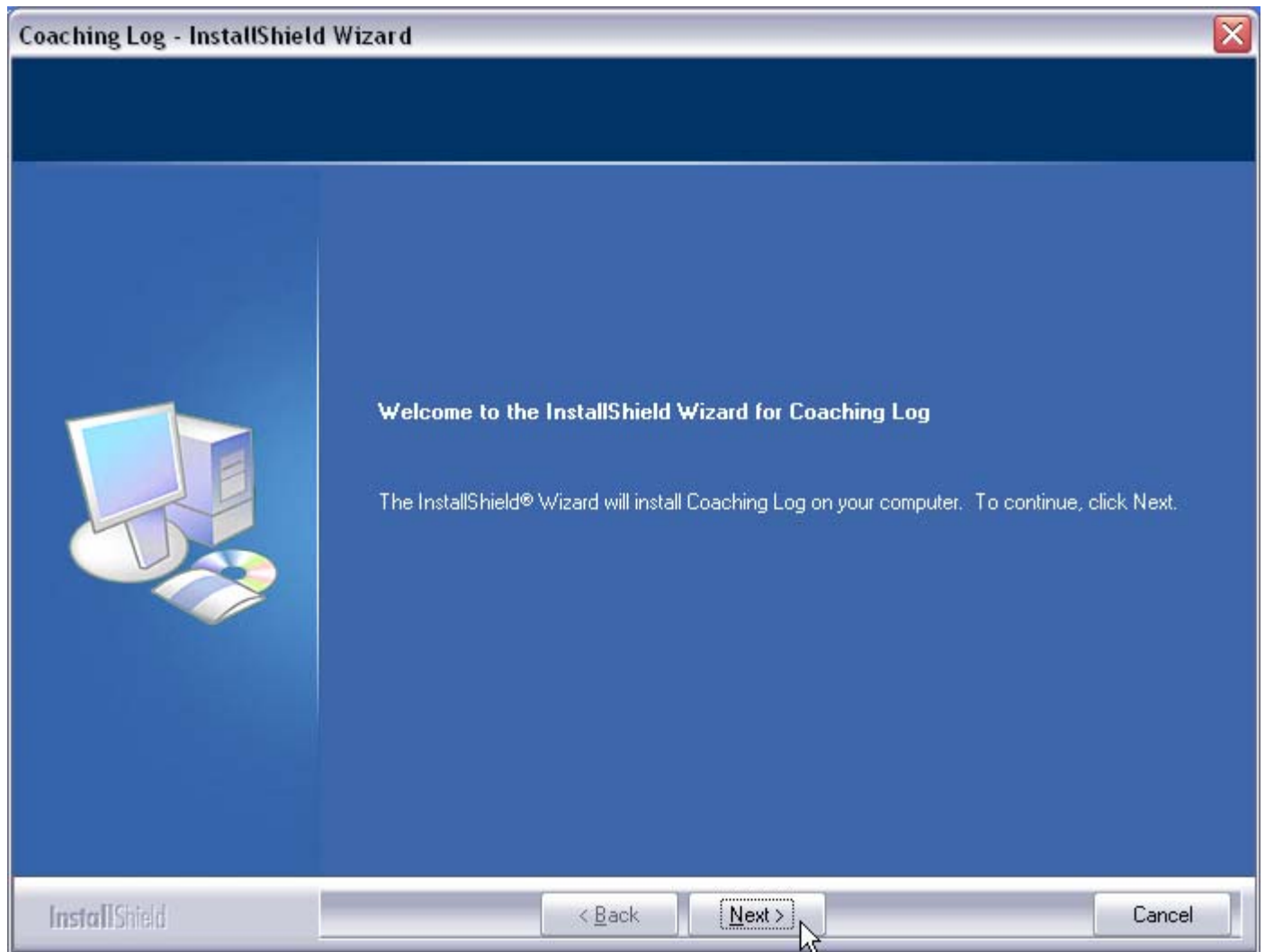


**Click OK.**

## Coaching Log™

This takes you to the second part of the installation, the installation of the Coaching Log™ application itself.

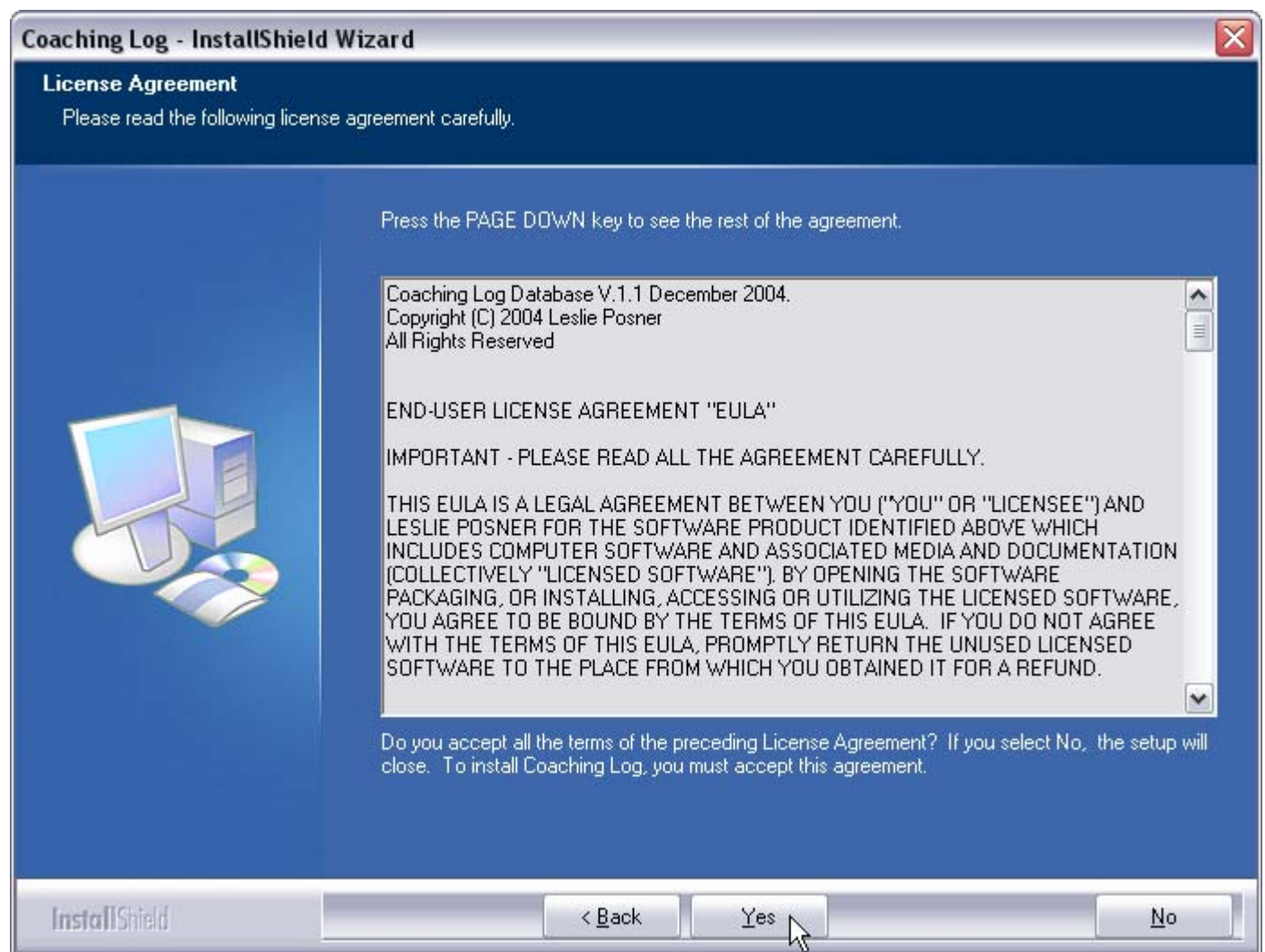
The next dialog box you will see is this one.



**Click Next.**

The next dialog box is the License Agreement.

**Please read this carefully and only proceed if you accept.**



Having read the license agreement thoroughly, and **only if you accept**, click **Yes**.

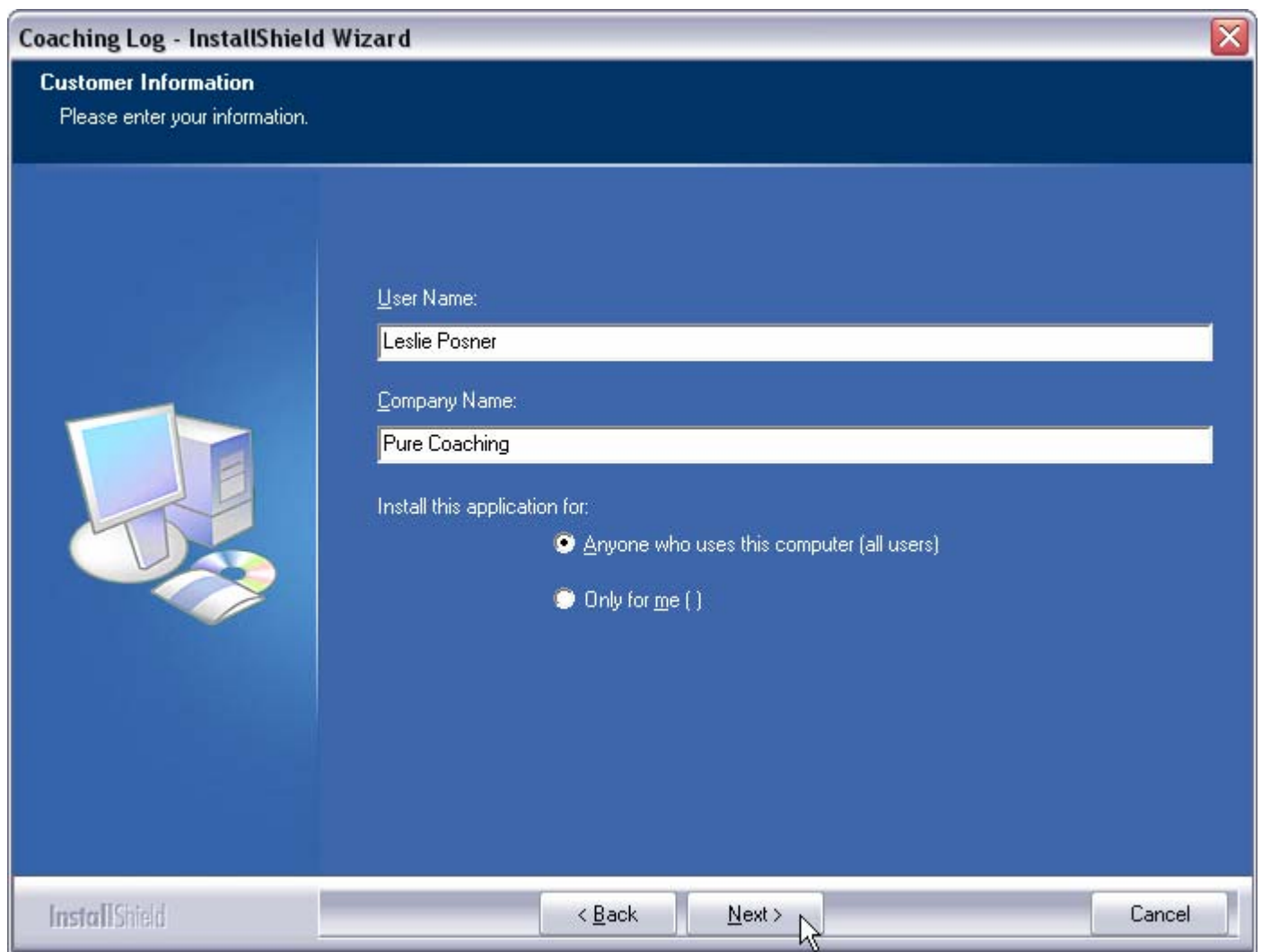
The next dialog box is for you to enter your personal details

**Note:** In order the Next button is activated directly upon entry of the User Name a dash '-' has been entered by default in the Company Name field. This can be overwritten if you wish to enter your company name.

You can install Coaching Log™ for use by all users or only yourself.

**Note: Any user wishing to use Coaching Log™ must have a user account type of Computer administrator. This application will not function with Limited user account types.**

If in doubt, check your account type via Control Panel User Accounts.



Coaching Log - InstallShield Wizard

Customer Information  
Please enter your information.

User Name:  
Leslie Posner

Company Name:  
Pure Coaching

Install this application for:

- ☒ Anyone who uses this computer (all users)
- ☐ Only for me ( )

InstallShield

< Back Next > Cancel

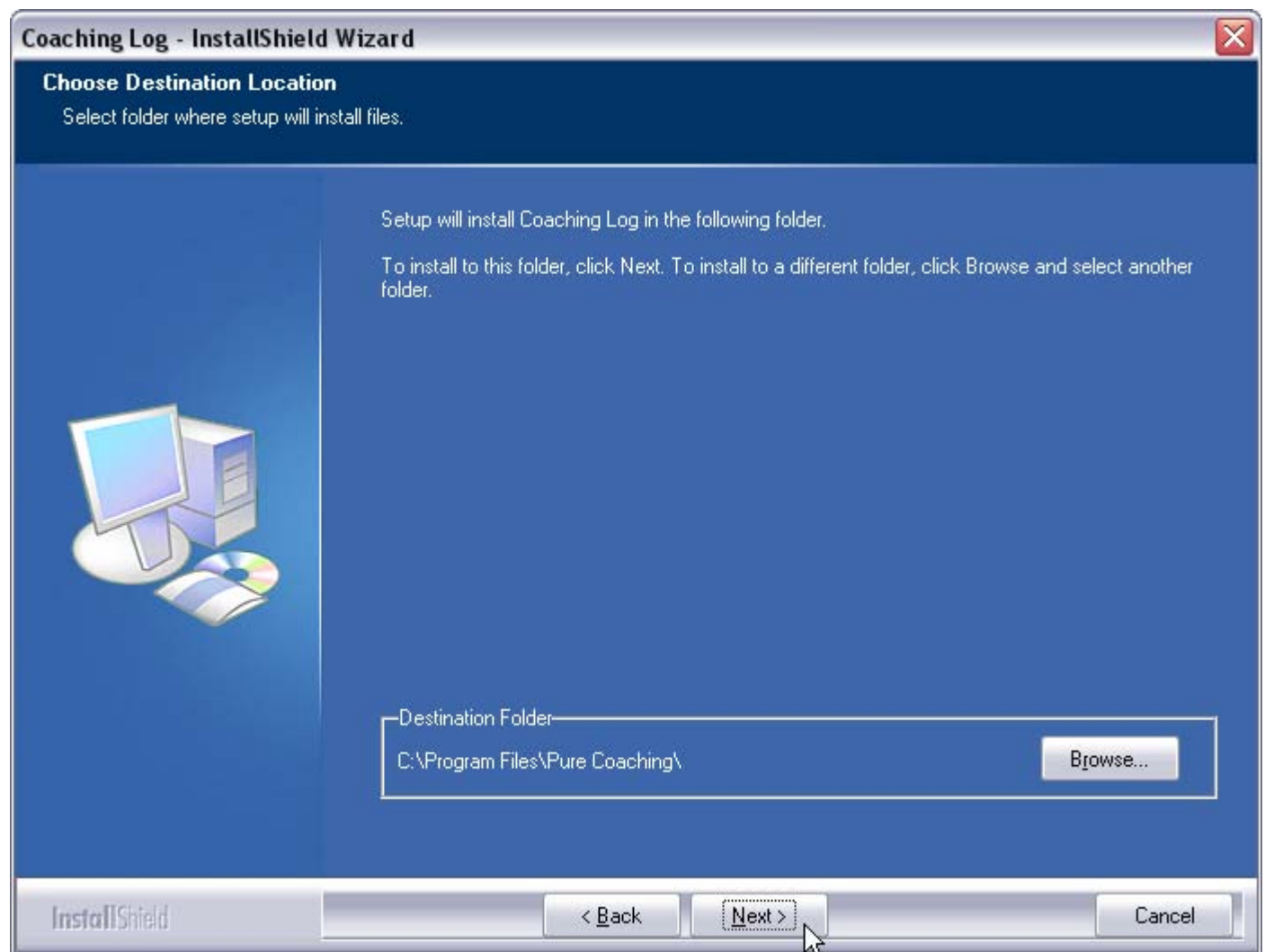
When you have entered your details and selected the user **click Next**.

This dialog box shows you the destination folder in which the application will be installed and allows you to choose another folder if you so wish.

**Note:** The destination folder displayed initially depends on the configuration of your system and may be different from the example below.

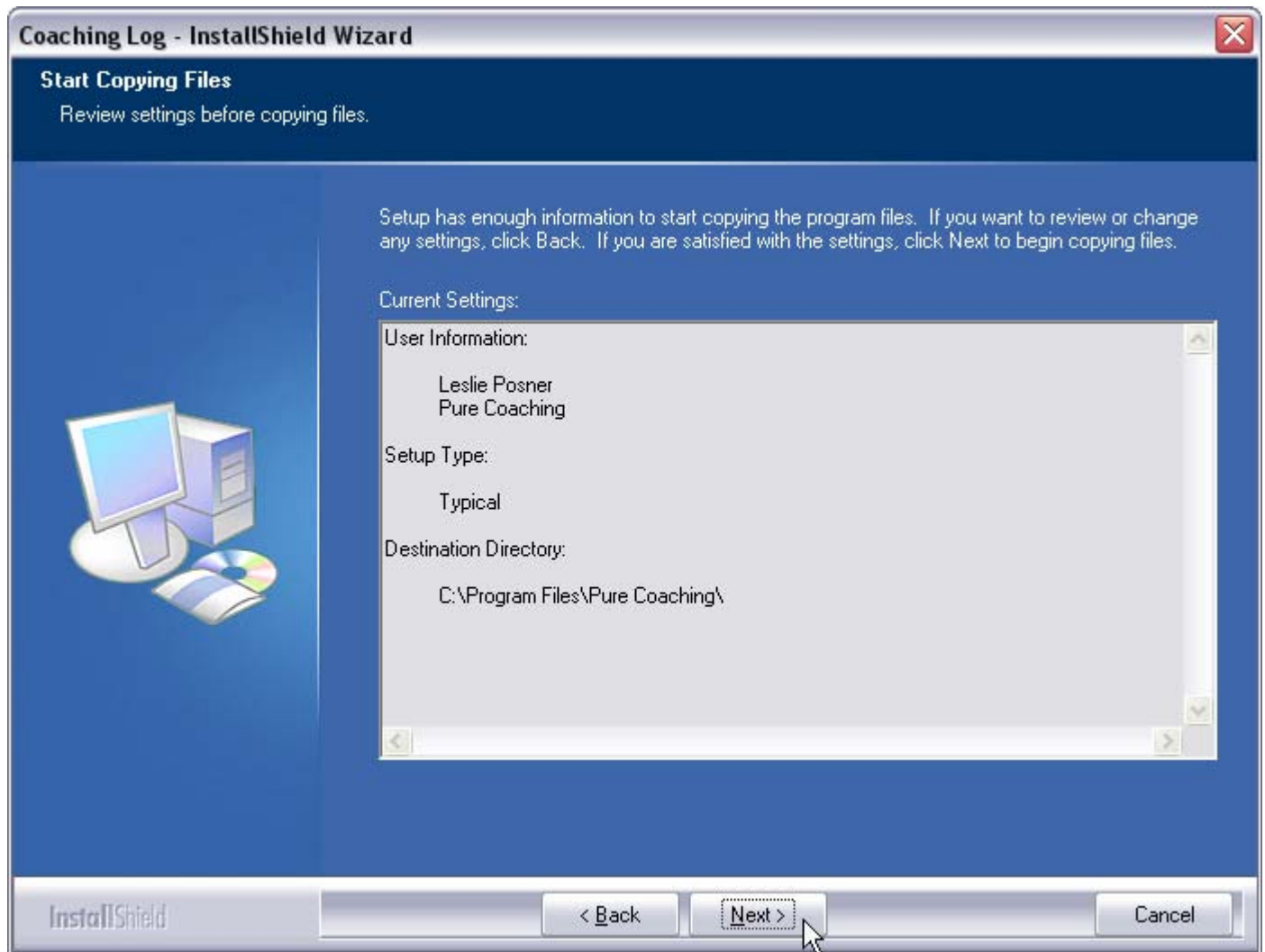
**If you are happy with the current destination folder click Next**, otherwise click Browse to select the folder in which you wish to install Coaching Log™.

Once you have selected a folder, this will be displayed in the Destination Folder window.

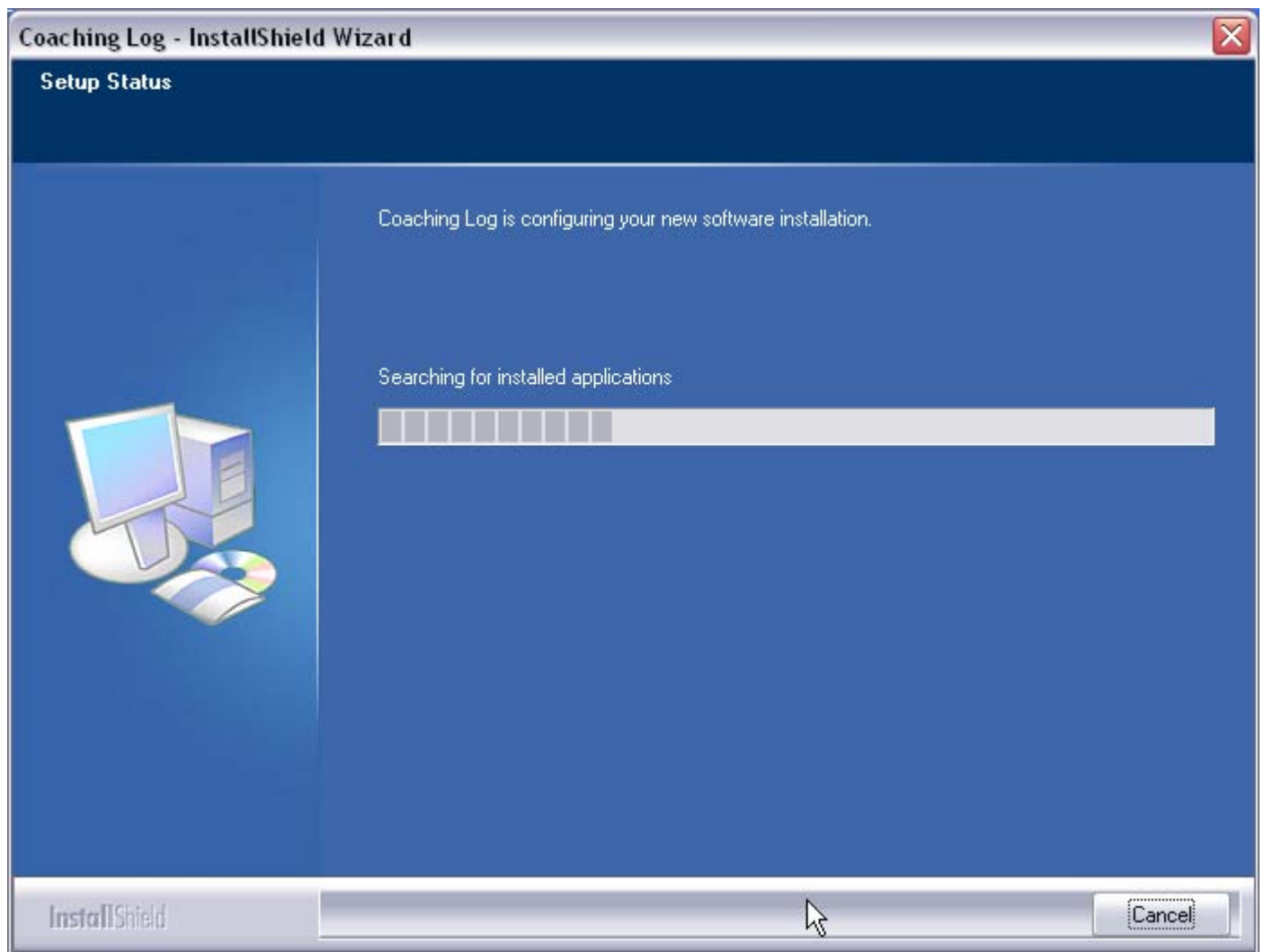


This dialog box allows you to review the details you entered previously.

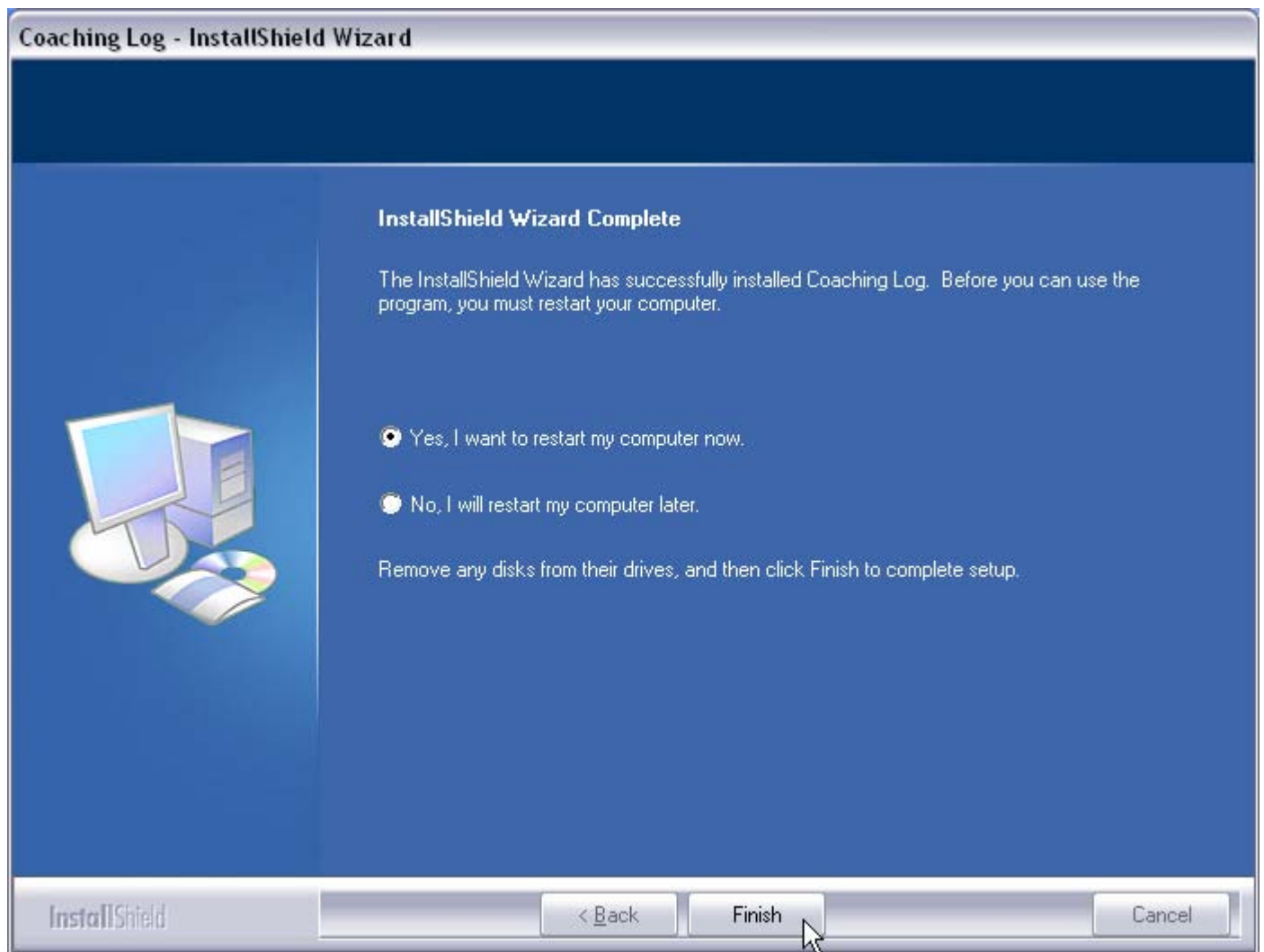
**If you are happy with these details click Next**, otherwise click Back and correct as required.



Installation starts and you will see this dialog box with the progress bar indicating the progress of the various stages.

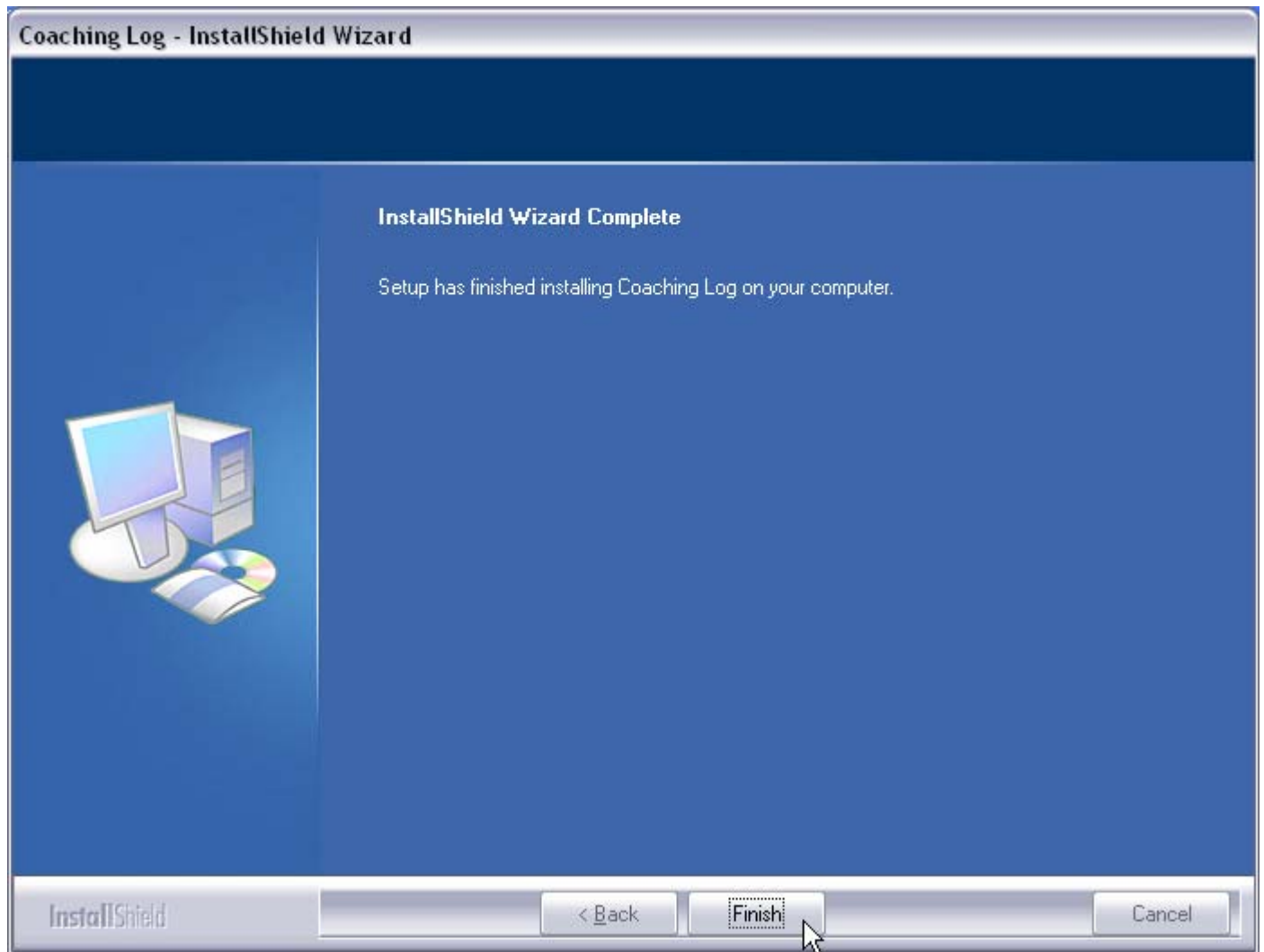


When the installation is complete, if it is the first time you have installed Coaching Log™ on your machine, you will see this dialog box.



Select when you wish to restart your computer and **click Finish**.

If you have previously installed Coaching Log™ on your machine you will see this dialog box.



**Click Finish.**

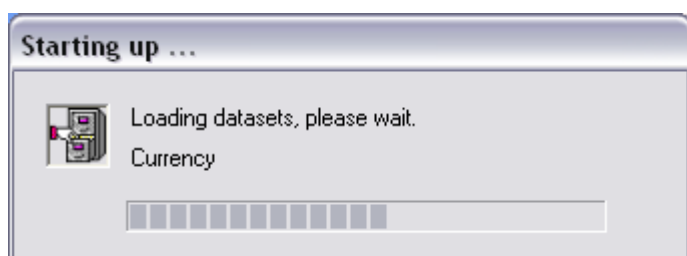
## Launching the Application

After installation, Coaching Log™ can be launched via Start/All Programs.



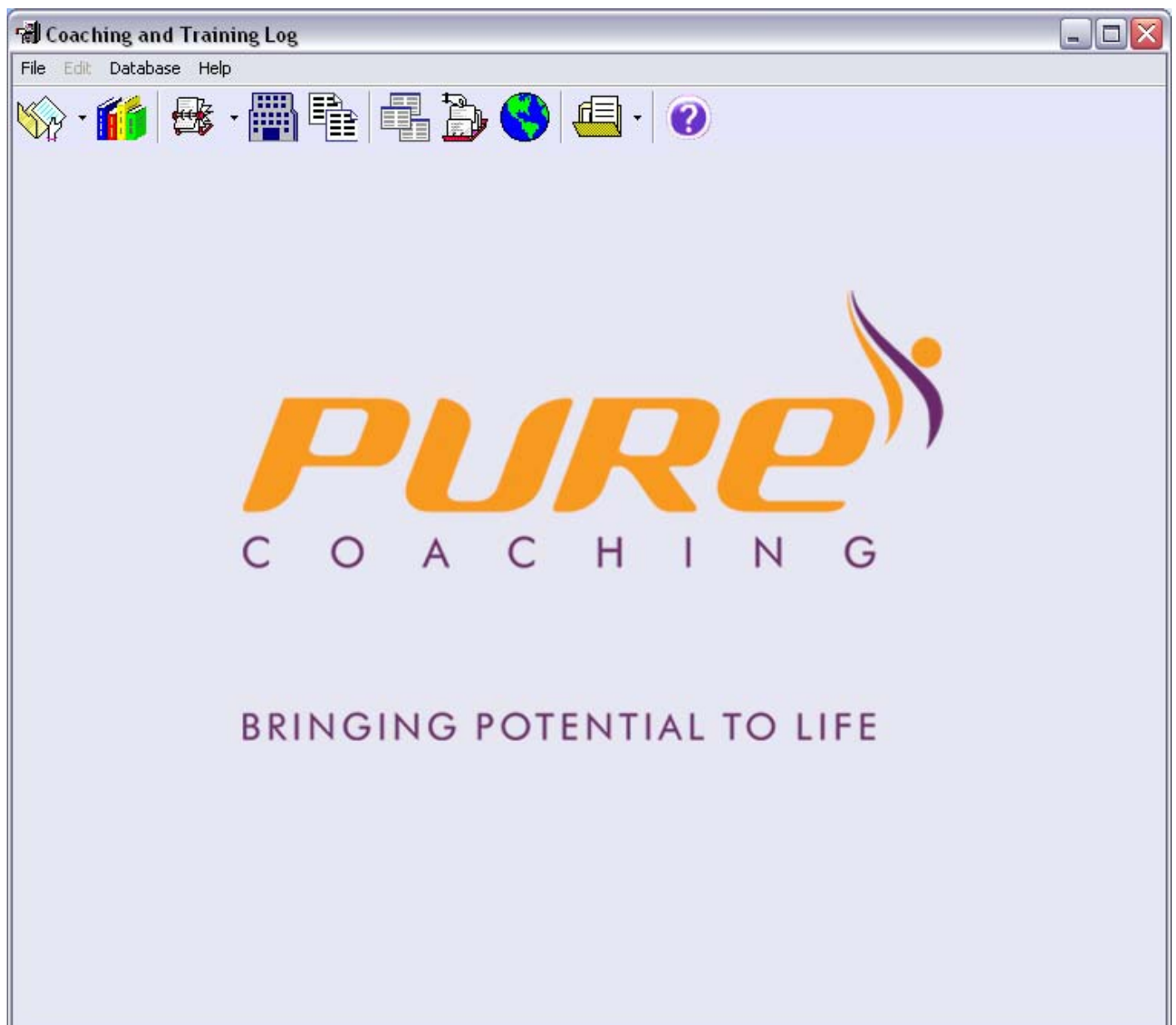
The first thing the application does as it starts is to fill the datasets from the database.

During this time you will see this dialog box.



## Start Screen

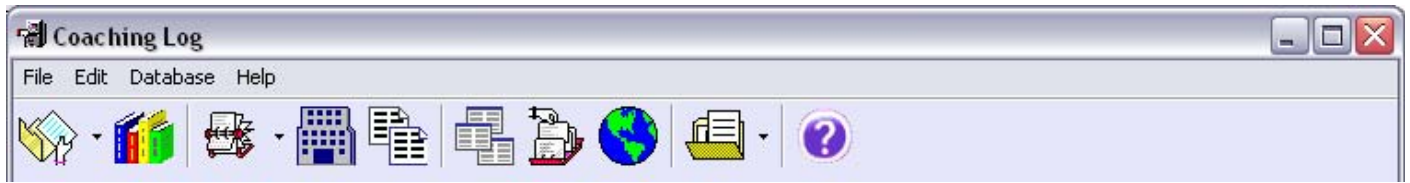
Once the datasets have been filled, the application is ready for use and you will see this panel.



# Finding Your Way Round

## Main Toolbar

All areas of the application are accessed via the main toolbar icons.



Moving your mouse over the icons will open a tool tip showing the name of the panel that will be opened when clicking the icon.

From left to right these are:

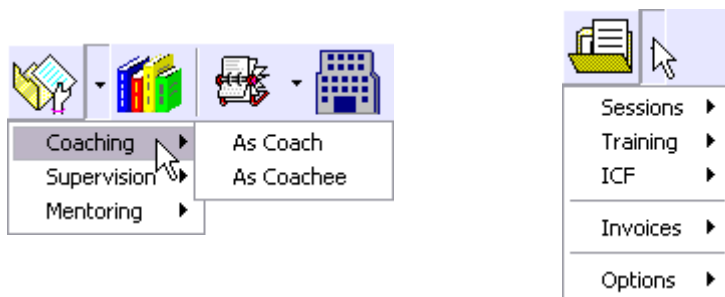
- ❖ [Sessions](#)
- ❖ [Training](#)
- ❖ [People/Prospects](#)
- ❖ [Companies](#)
- ❖ [Projects](#)
- ❖ [Lists](#)
- ❖ [My Details](#)
- ❖ [Countries](#)
- ❖ [Reports](#)
- ❖ Help

There are three icons with a downward pointing arrow to their right: Sessions, People and Reports.

In the example of the People icon the main icon and downward pointing arrow have separate functions, with the main icon taking you to the People panel and the downward pointing arrow taking you to the Prospects data grid.



In the example of the other two icons: Sessions and Reports, the main icon has no function and the downward pointing arrow opens a drop down menu from which you can select your choice.



**Note:** The Sessions menu and Reports menu options regarding Supervision and Mentoring and Reports menu options regarding Company, Client and Contact invoices and are not implemented in this version.

## Main Menu

The main menu is where you find the following:

**File** Save and Exit.



**Save** saves any changes made to existing records in panels or data grids and any new records created via Edit Insert New Record.

**Exit** exits the application, as does clicking the red button with the white cross at the top right of the main frame.

On exiting the application you will see this dialog box.



Clicking No will return you to the application. Hitting Enter is the same as clicking No.

Clicking Yes will close the application.

If there are any unsaved changes you will see a dialog box similar to this.

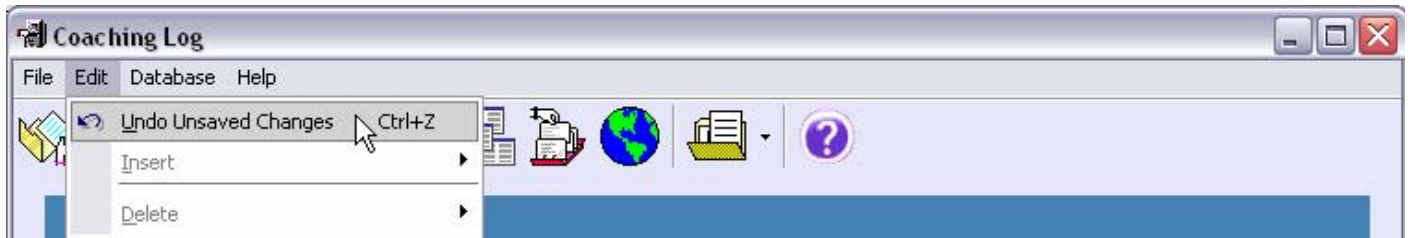


Click Yes to save the changes and exit. Hitting Enter is the same as clicking Yes.

Click no to discard the changes and exit.

**Edit** Undo Unsaved Changes, Insert New Record and Delete Current Record.

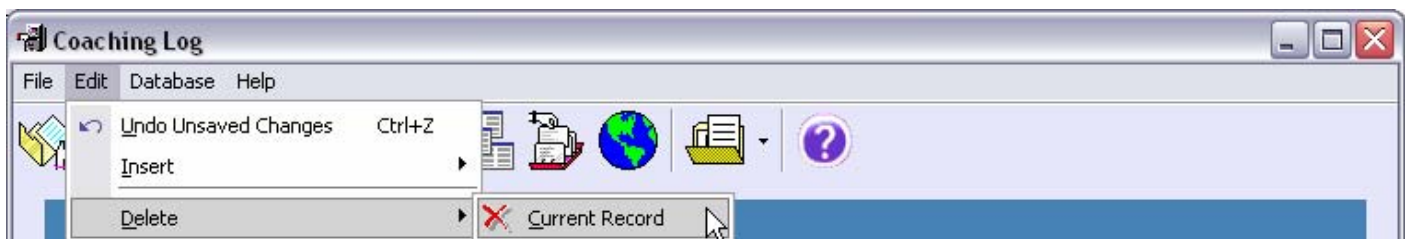
**Undo Unsaved Changes** cancels all changes that have not yet been saved to the database.



**Insert New Record** creates a new record in the People, Companies, Projects or Countries panels.

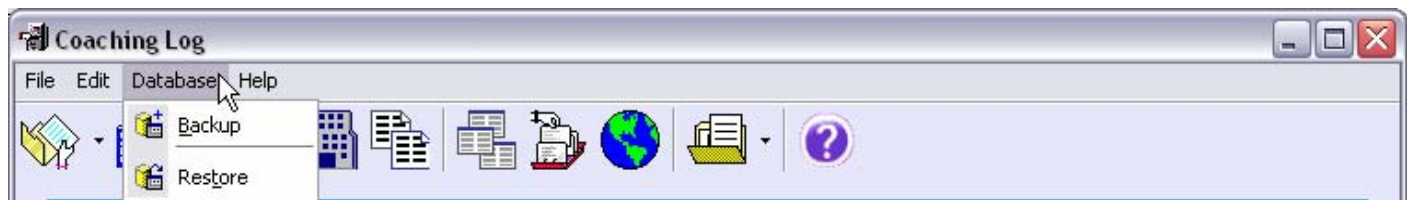


**Delete Current Record** deletes the current record from the People, Companies, Projects or Countries panels.



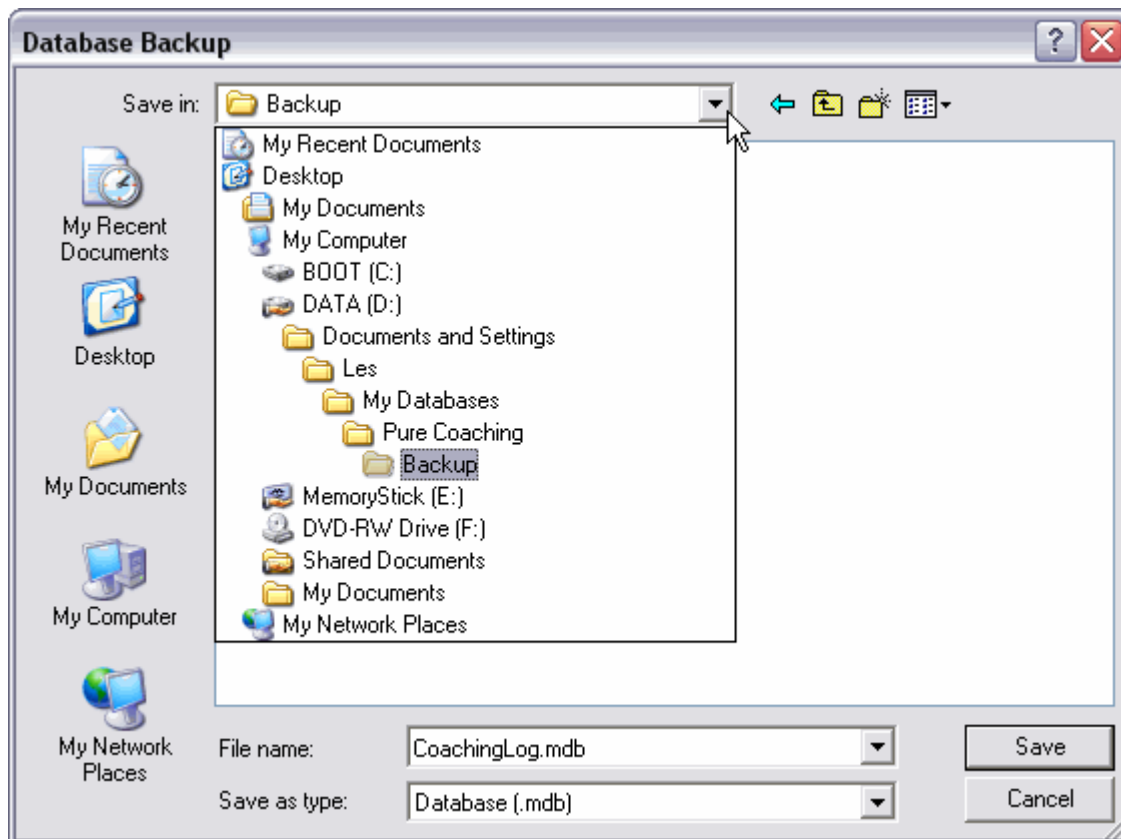
**Note:** If you create or delete a record in error you can roll back by clicking Undo Unsaved Changes as long as the changes have not been saved.

## Database Backup and Restore.



**Backup** makes a backup copy of the current working database to the location you select via this dialog box.

On clicking Database Backup you will see a dialog box similar to this.



You navigate to the location in which you wish to save the backup copy via the Save in window.

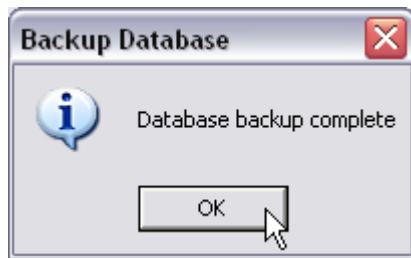
**It is recommended that you store the backup copy of your working database in a folder that is not a sub folder of the folders created by the application during installation, as these folders will be removed during de-installation or re-installation hence you will lose your database backup.**

The File name is already set to CoachingLog.mdb. You can alter the file name if you wish so you can save different versions of the database, say by date, or if you are working with different databases for different activities.

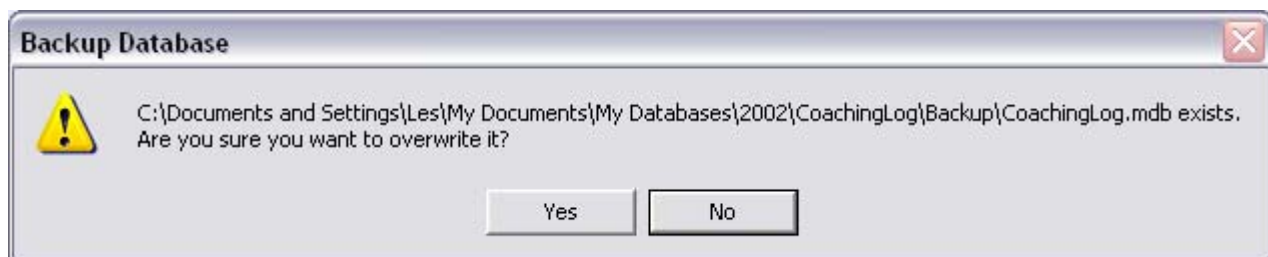
The File type is set to Database (.mdb) and should not be altered.

When you are happy with the settings **click Save**.

If the file name you have set for the backup does not exist in the location you have specified then the backup will be saved and you will see this dialog box



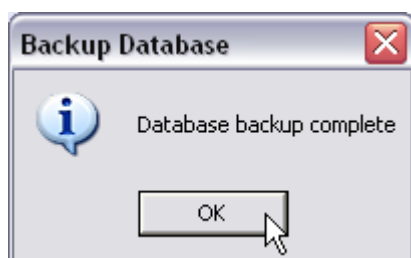
If the file name you have set for the backup already exists in the location you have specified then you will see a dialog box similar to this



If you are sure that you want to overwrite the existing file click Yes. Otherwise click No and go back to repeat the process.

Clicking Yes will replace the existing file with a copy of the current working database.

When the backup is complete you will see this dialog box

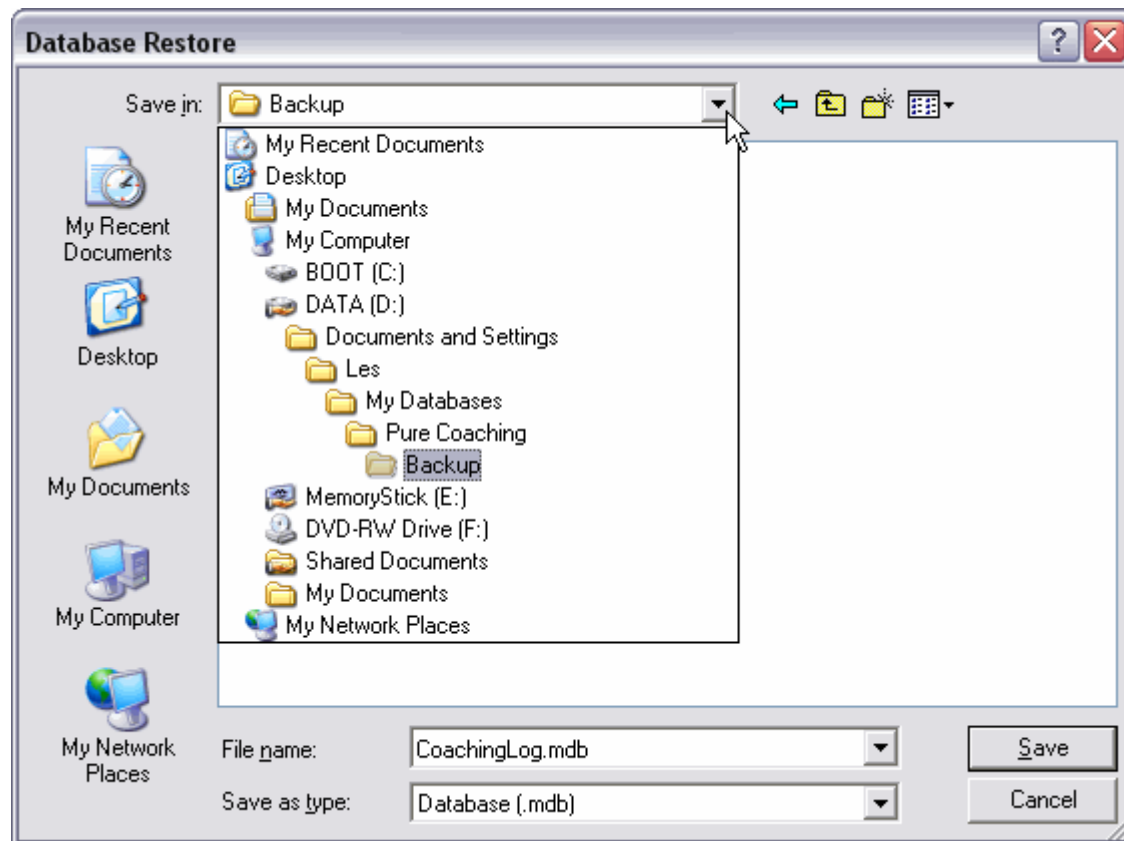


**Click OK.**

**Restore** restores a previously made backup copy of the database to the location of the current working database.

You may wish to restore the database if, for example, you have inadvertently deleted a record and want to roll back or if you are working with different databases for different activities.

On clicking Database Restore you will see a dialog box similar to this.



Navigate to the location in which the backup copy you wish to restore is stored via the Save in window.

**Note:** This is correct. Although you are restoring (saving) the database to the current working database location, the process uses a dialog box where we don't have control over the labels.

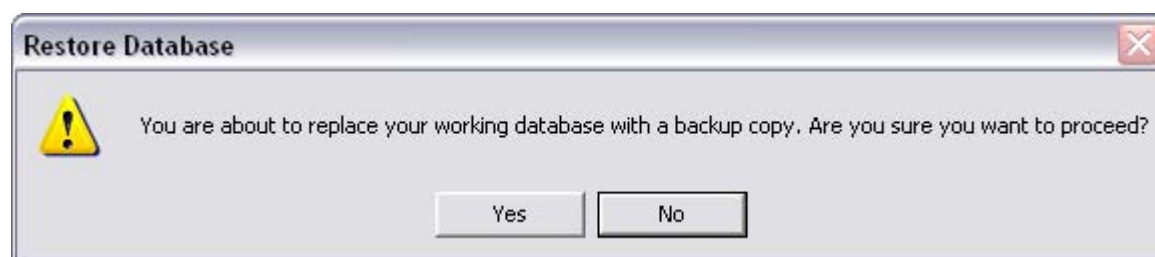
CoachingLod.mdb is already entered in the File name window.

If you have saved different versions of the database with different file names as suggested previously, click on the file you wish to restore and the file name will be plugged into the File name window.

**Note:** Although you may select a file name to be restored that is other than CoachingLog.mdb, the name given to the database restored to the working database location will be CoachingLog.mdb, as this is the only one recognised by the application.

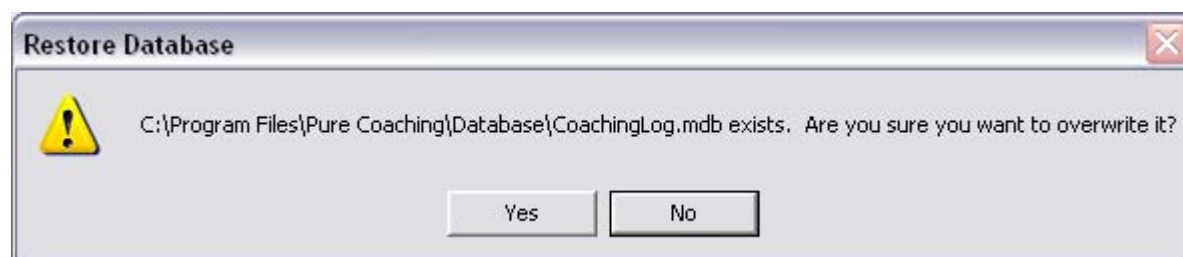
When you are happy with the settings **click Save**.

You will then see this dialog box



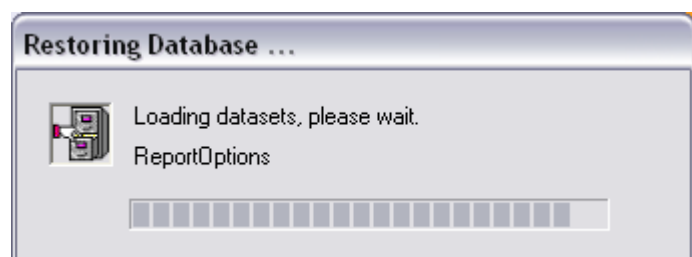
If you are sure you wish to proceed, click Yes, otherwise click No.

If you click Yes you will see this dialog box



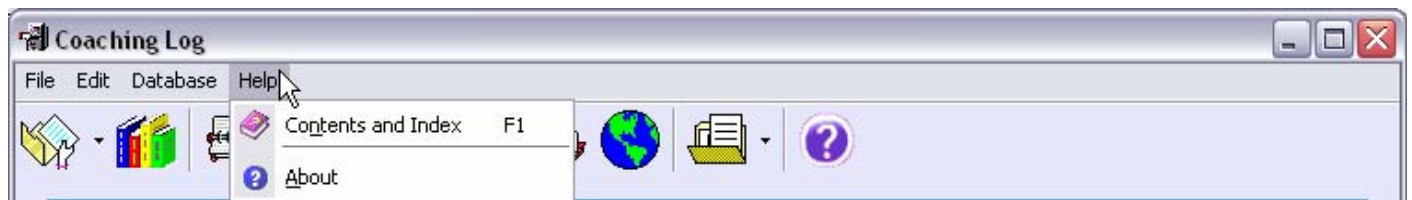
If you are sure you want to replace the current database click Yes, otherwise click no.

If you click Yes the current working database will be replaced by the database you selected and you will see this dialog box as the datasets are filled



Once the datasets are filled you will see the [start screen](#) and the application is ready for use.

**Help** Contents and Index and About.



**Contents and Index** launches Help and displays the Contents and Index tabs.

**About** displays this dialog box giving information about the application



Click OK or click the red square with the white cross in the top right corner to close.

**Greyed out menu items.** Depending upon where you are in the application certain menu items may be greyed out indicating they are not available from that area.

## Entering Data

Coaching Log™ ships with several dummy records already entered into the database so you can see what is entered where and generate examples of reports as you find your way round immediately after installation.

When you are ready to enter your own information you can either change the information already entered in the dummy records, or delete them and enter your own from scratch.

Here we will walk you through the key areas for data entry.

## People

All personal information regarding the people with whom you work, be they coachees, coaches, clients, prospects, associates, referral partners etc., is entered via the People panel, as are any confidentiality references and the selection of which of the ICF credentialing reports: Client Hours and Letters of Reference, if any, in which you want this person's details to appear.

The screenshot shows the 'Coaching Log' application window. The title bar reads 'Coaching Log' with standard window controls. The menu bar includes 'File', 'Edit', 'Database', and 'Help'. The toolbar contains icons for file operations, a 'People' icon (highlighted with a tooltip), a globe, and a help icon. The main area is titled 'People' in a large blue header. Below this, the form is organized into several sections:   
 - **Name**: Fields for Title (dropdown with 'Mr.' selected), First Name (text box with 'FirstName1'), Last Name (text box with 'LastName1'), and Suffix (dropdown).   
 - **Address**: Fields for Address 1, Address 2, Town, City, ZIP, State, and Country (dropdown with 'UNITED KINGDOM' selected).   
 - **Telephone, Fax, e-mail and web**: Fields for Tel 1, Tel 2, Fax, E-mail 1, E-mail 2, Web 1, and Web 2.   
 - **Company**: Fields for Name (dropdown) and Dept.   
 - **Additional Information**: Fields for Relation (dropdown with 'Coachee' selected), B'day, and a large text area for Notes.   
 - **Confidentiality**: A field for Reference (text box with '040015').   
 - **ICF Reports**: Checkboxes for 'Client Hours' and 'Letters Of Reference', both of which are checked.   
 At the bottom, there is a navigation bar with buttons for back, previous, next, forward, and a page indicator showing '1 of 4'.

You can enter as much information as you want but the minimum information you must enter is Title, Country and Relationship.

There are certain fields with an arrow  to the right. Clicking in the field or this arrow will present you with a drop down list from which you can choose the value you want to enter in the field.

**Note:** In the case you cannot find a suitable entry in the list, you can add your own entries to the [drop down list](#).

There are no default selections for Title and Relation so you must choose these from the drop down lists displayed when you click in the field or on the arrow.

For the country, unless you choose otherwise the first country on the list, AFGHANISTAN, will be entered by default.

**Note:** Where you wish to enter the name of the company a person works for, the company information must first be entered via the [Companies](#) panel and the record saved before you can make a selection from the drop down list.

The E-mail and Web fields have buttons to their right. Clicking the button to the right of the E-mail field will launch your default e-mail client and plug the address from the E-mail field into the To: field of the new e-mail.

Clicking the button to the right of the Web field will launch your default web browser and take you to the URL entered in the Web field.

## Companies

This is where you enter all information regarding any companies your coachees, coaches, clients, associates etc. work for, your own company details and also the details of any training providers you wish to record details of your training with.

The screenshot shows the 'Coaching Log' application window. The menu bar includes 'File', 'Edit', 'Database', and 'Help'. The toolbar contains icons for file operations, a 'Companies' icon (highlighted with a tooltip), a globe, and a help icon. The main window has a blue header with the title 'Companies'. Below this, there are three main sections: 'Name and Address', 'Telephone, Fax, e-mail and web', and 'Additional Information'. The 'Name and Address' section contains fields for Name, Address 1, Address 2, Town, City, ZIP, State, and Country (a dropdown menu). The 'Telephone, Fax, e-mail and web' section contains fields for Tel 1, Tel 2, Fax 1, Fax 2, E-mail 1, E-mail 2, Web 1, and Web 2, each with a corresponding action button (envelope for email, globe for web). The 'Additional Information' section contains fields for Reg. No., Tax No., and Training Provider (a checkbox), followed by a large 'Notes' text area. At the bottom, there is a navigation bar with buttons for back, previous, next, forward, and a '1 of 4' indicator.

| Name and Address |                    | Telephone, Fax, e-mail and web |                        |
|------------------|--------------------|--------------------------------|------------------------|
| Name:            | Pure Coaching (CH) | Tel 1:                         | +44 7974 145656        |
| Address 1:       | Case Postale       | Tel 2:                         |                        |
| Address 2:       |                    | Fax 1:                         |                        |
| Town:            |                    | Fax 2:                         |                        |
| City:            | St. Sulpice        | E-mail 1:                      | info@Pure-Coaching.com |
| ZIP:             | 1025               | E-mail 2:                      |                        |
| State:           |                    | Web 1:                         | www.Pure-Coaching.com  |
| Country:         | SWITZERLAND        | Web 2:                         |                        |

| Additional Information |           |          |         |                    |                          |
|------------------------|-----------|----------|---------|--------------------|--------------------------|
| Reg. No.:              | 3521 (CH) | Tax No.: | 228 667 | Training Provider: | <input type="checkbox"/> |
| Notes:                 |           |          |         |                    |                          |

The minimum information you must enter is Country and, unless you choose otherwise, the first country on the list, AFGHANISTAN, will be entered by default.

The Country field has an arrow  to the right. Clicking in the field or this arrow will present you with a drop down list from which you can choose the country name you want to enter in the field.

The E-mail and Web fields have buttons to their right. Clicking the button to the right of the E-mail field will launch your default e-mail client and plug the address from the E-mail field into the To: field of the new e-mail. Clicking the button to the right of the Web field will launch your default web browser and take you to the URL entered in the Web field.

## My Details

This is where you enter all information regarding yourself.

The information in the lower 'Company' section of the panel is plugged in when you select your company name from the drop down list and save the record.

**Note:** Before you can select a company name from the drop down list you must first enter the information via the [Companies](#) panel and save the record.

You can enter as many of these records as you desire, for example, if you have different companies or one company with a number of office locations.

The information you enter here will appear on report headers, dependant upon your selection of the various [report options](#).

**Coaching Log**

File Edit Database Help

**My Details**

**Personal**

Title:  First Name:  Last Name:  Suffix:

**Address**

Address 1:   
Address 2:   
Town:   
City:   
ZIP:   
State:   
Country:

**Telephone, Fax, e-mail and web**

Tel 1:   
Tel 2:   
Fax:   
E-mail 1:   
E-mail 2:   
Web 1:   
Web 2:

**Company**

Name:  Reg. No.:  Tax No.:

**Address**

Address 1:   
Address 2:   
Town:   
City:   
ZIP:   
State:   
Country:

**Telephone, Fax, e-mail and web**

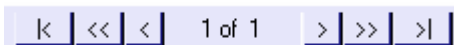
Tel 1:   
Tel 2:   
Fax:   
E-mail 1:   
E-mail 2:   
Web 1:   
Web 2:

## Prospects

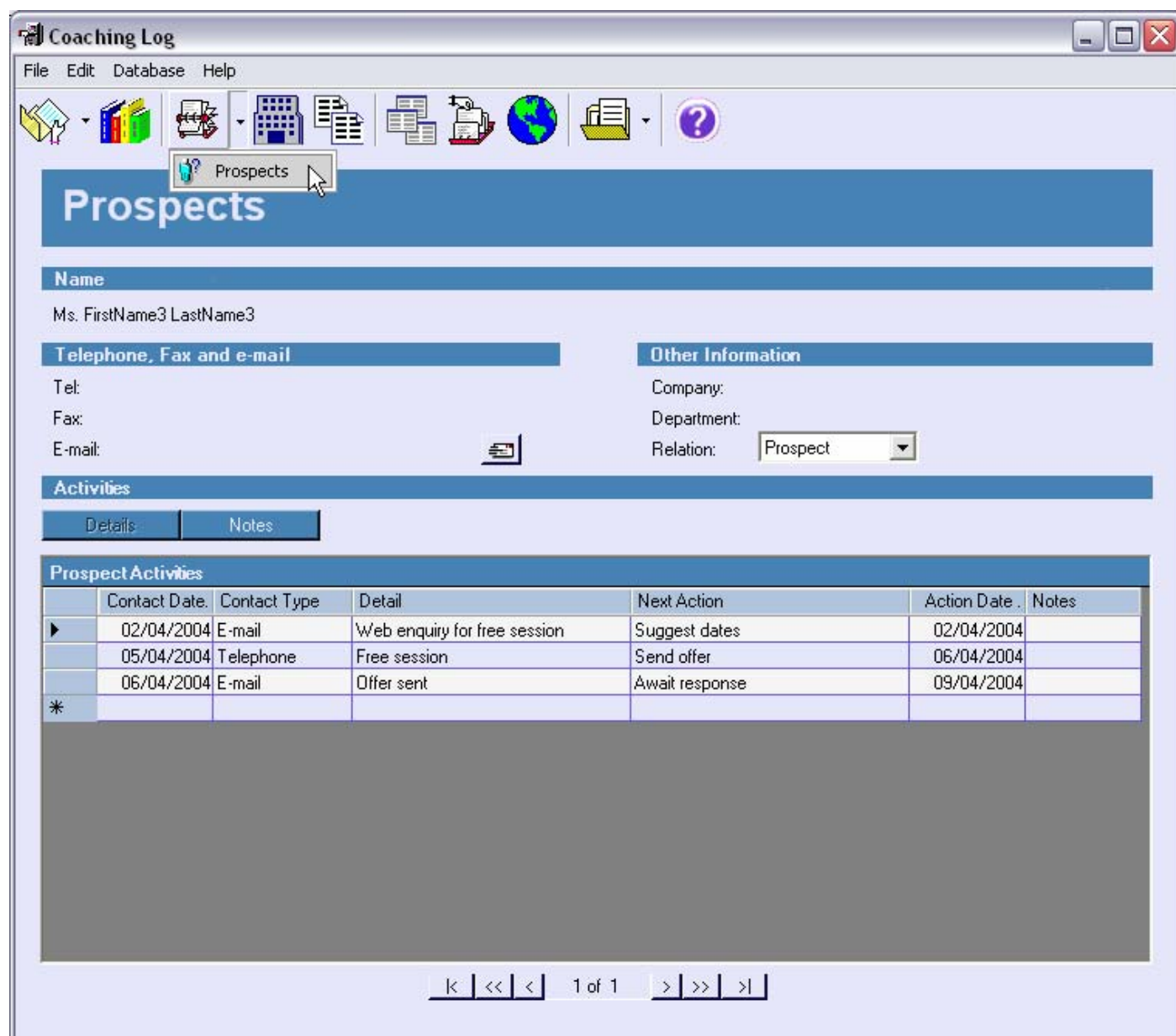
This is where you can record your activities with any prospects prior to them signing up as a coachee, client etc. or, in the case you are selecting a coach, prior to you signing up with them.

The information in the top section of the panel is display only and comes from the information you entered in the [People](#) panel where you set the relation as Prospect.

In this example there is only one record but where there are several records (Prospects) you select the record (Prospect) you wish to enter information for by using the navigation buttons at the bottom of the panel.



Once you have navigated to the record for which you want to enter activity details, this information is entered directly into the data grid in the lower half of the panel and is covered in the [Data Grids](#) section.



The screenshot shows the 'Coaching Log' application window. The 'Prospects' panel is active, displaying a form for a prospect named 'Ms. FirstName3 LastName3'. The form includes fields for 'Telephone, Fax and e-mail' and 'Other Information', with a 'Relation' dropdown set to 'Prospect'. Below the form is an 'Activities' section with 'Details' and 'Notes' tabs. The 'Details' tab is selected, showing a table of prospect activities.

|   | Contact Date | Contact Type | Detail                       | Next Action    | Action Date | Notes |
|---|--------------|--------------|------------------------------|----------------|-------------|-------|
| ▶ | 02/04/2004   | E-mail       | Web enquiry for free session | Suggest dates  | 02/04/2004  |       |
|   | 05/04/2004   | Telephone    | Free session                 | Send offer     | 06/04/2004  |       |
|   | 06/04/2004   | E-mail       | Offer sent                   | Await response | 09/04/2004  |       |
| * |              |              |                              |                |             |       |

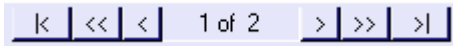
## Sessions And Invoices

### Sessions As Coach

This is where you can record the details of all the sessions you have with your coachees.

The information in the top section of the panel is display only and comes from the information you entered in the [People](#) panel where you set the relation as Coachee.

To select the record (Coachee) you wish to enter information for use the navigation buttons at the bottom of the panel.



Once you have selected the record for which you want to enter session details, this information is entered directly into the data grid in the lower half of the panel and is covered in the [Data Grids](#) section.

**Coaching Log**

File Edit Database Help

Sessions

## Coachee Sessions and Invoices

**Name**  
Mr. FirstName1 LastName1

**Telephone, Fax and e-mail**  
Tel: Telephone  
Fax:  
E-mail: EmailAddress

**Other Information**  
Company:  
Department:  
Birthday:

**Sessions and Invoices**

Sessions Session Notes Invoices Invoice Notes

| Coachee Sessions |            |      |           |               |             |              |       |         |
|------------------|------------|------|-----------|---------------|-------------|--------------|-------|---------|
|                  | Date       | min. | Type      | Rate          | Invoice To: | Invoice No.: | Notes | Project |
| ▶                | 12/04/2004 | 30   | Telephone | Complimentary |             |              |       |         |
|                  | 19/04/2004 | 45   | Telephone | Paid          | LastName1   | Inv1         |       |         |
|                  | 26/04/2004 | 45   | Telephone | Paid          | LastName1   | Inv1         |       |         |
|                  | 03/05/2004 | 45   | Telephone | Paid          | LastName1   | Inv1         |       |         |
|                  | 10/05/2004 | 45   | Telephone | Paid          | LastName1   | Inv1         |       |         |
|                  | 07/07/2004 | 60   | Telephone | Paid          | LastName1   | Inv2         |       |         |
| *                |            |      |           |               |             |              |       |         |

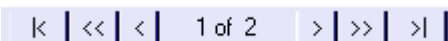
Navigation buttons: < << < 1 of 2 > >> >

## Coachee Invoices

This is where you can record the details of the invoices you raise for the sessions you have with your coachees.

The information in the top section of the panel is display only and comes from the information you entered in the [People](#) panel where you set the relation as Coachee.

To select the record (Coachee) you wish to enter information for use the navigation buttons at the bottom of the panel.



Once you have selected the record for which you want to enter invoice details, this information is entered directly into the data grid in the lower half of the panel and is covered in the [Data Grids](#) section.

The screenshot shows the 'Coaching Log' application window. The title bar reads 'Coaching Log'. The menu bar includes 'File', 'Edit', 'Database', and 'Help'. The toolbar contains various icons for file operations, database management, and help. The main panel is titled 'Coachee Sessions and Invoices'. It features a 'Name' field with the value 'Mr. FirstName1 LastName1'. Below this are two sections: 'Telephone, Fax and e-mail' and 'Other Information'. The 'Telephone, Fax and e-mail' section includes fields for 'Tel:', 'Fax:', and 'E-mail:'. The 'Other Information' section includes fields for 'Company:', 'Department:', and 'Birthday:'. Below these sections is a tabbed interface with four tabs: 'Sessions', 'Session Notes', 'Invoices', and 'Invoice Notes'. The 'Invoices' tab is currently selected. Below the tabs is a table titled 'Coachee Invoices'. The table has the following columns: 'Ref. No.', '# of Sessions', 'Type', 'Currency', 'Amount', 'Tax %', 'Tax Incl.', 'Terms', 'Sent', and 'Received'. The table contains two rows of data: 'Inv1' with 4 sessions, 'Telephone' type, 'GBP' currency, '320.00' amount, '17.50' tax, '10' terms, '14/05/2004' sent date, and 'Received' field empty; and 'Inv2' with 1 session, 'Telephone' type, 'GBP' currency, '100.00' amount, '17.50' tax, '10' terms, '09/07/2004' sent date, and 'Received' field empty. Below the table is a large empty area for additional information. At the bottom of the window are navigation buttons for the data grid, showing '1 of 2' records.

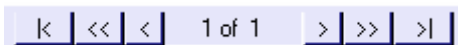
| Ref. No. | # of Sessions | Type      | Currency | Amount | Tax % | Tax Incl.                           | Terms | Sent       | Received |
|----------|---------------|-----------|----------|--------|-------|-------------------------------------|-------|------------|----------|
| Inv1     | 4             | Telephone | GBP      | 320.00 | 17.50 | <input type="checkbox"/>            | 10    | 14/05/2004 |          |
| Inv2     | 1             | Telephone | GBP      | 100.00 | 17.50 | <input checked="" type="checkbox"/> | 10    | 09/07/2004 |          |

## Sessions As Coachee

This is where you can record the details of all the sessions you have with your coaches.

The information in the top section of the panel is display only and comes from the information you entered in the [People](#) panel where you set the relation as Coach.

To select the record (Coach) you wish to enter information for use the navigation buttons at the bottom of the panel.



Once you have selected the record for which you want to enter session details, this information is entered directly into the data grid in the lower half of the panel and is covered in the [Data Grids](#) section.

The screenshot shows the 'Coaching Log' application window. The title bar reads 'Coaching Log'. The menu bar includes 'File', 'Edit', 'Database', and 'Help'. The toolbar contains various icons, including a folder, a book, a printer, a building, a document, a globe, and a question mark. A 'Sessions' button is highlighted in the toolbar.

### Coach Sessions and Invoices

**Name**  
Mrs. FirstName2 LastName2

**Telephone, Fax, e-mail and web**  
Tel:  
Fax:  
E-mail:

**Other Information**  
Company:  
Department:  
Birthday:

**Sessions and Invoices**

Sessions | Session Notes | Invoices | Invoice Notes

| Coach Sessions |            |      |              |      |              |              |       |         |
|----------------|------------|------|--------------|------|--------------|--------------|-------|---------|
|                | Date       | min. | Type         | Rate | Invoiced by: | Invoice No.: | Notes | Project |
| ▶              | 08/03/2004 | 45   | Face to face | Paid | LastName2    | Coach1       |       |         |
|                | 05/04/2004 | 45   | Face to face | Paid | LastName2    | Coach1       |       |         |
| *              |            |      |              |      |              |              |       |         |

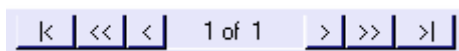
Navigation buttons at the bottom: |< << < 1 of 1 > >> >|

## Coach Invoices

This is where you can record the details of the invoices you receive for the sessions you have with your coaches.

The information in the top section of the panel is display only and comes from the information you entered in the [People](#) panel where you set the relation as Coach.

To select the record (Coach) you wish to enter information for use the navigation buttons at the bottom of the panel.



Once you have selected the record for which you want to enter invoice details, this information is entered directly into the data grid in the lower half of the panel and is covered in the [Data Grids](#) section.

The screenshot shows the 'Coaching Log' application window. The title bar reads 'Coaching Log'. The menu bar includes 'File', 'Edit', 'Database', and 'Help'. The toolbar contains various icons for file operations, database management, and help. The main panel is titled 'Coach Sessions and Invoices'. Below this title, there is a section for 'Name' with the text 'Mrs. FirstName2 LastName2'. To the right of the name, there are two columns: 'Telephone, Fax, e-mail and web' and 'Other Information'. The 'Telephone, Fax, e-mail and web' column contains fields for 'Tel:', 'Fax:', and 'E-mail:'. The 'Other Information' column contains fields for 'Company:', 'Department:', and 'Birthday:'. Below these fields, there is a section titled 'Sessions and Invoices' with four tabs: 'Sessions', 'Session Notes', 'Invoices', and 'Invoice Notes'. The 'Invoices' tab is currently selected. Below the tabs, there is a table titled 'Coach Invoices'. The table has the following columns: 'Ref. No.', '# of Sessions', 'Type', 'Currency', 'Amount', 'Tax %', 'Tax Incl.', 'Received', 'Paid', and 'Rem'. The first row of data shows 'Coach1', '2', 'Face to face', 'GBP', '200.00', '17.50', a checked box, '08/03/2004', '08/03/2004', and an empty cell. Below the table, there is a large grey rectangular area, likely a placeholder for a detailed view or a scrollable area. At the bottom of the panel, there are navigation buttons similar to the ones shown in the previous image.

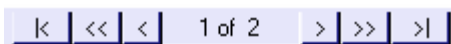
| Ref. No. | # of Sessions | Type         | Currency | Amount | Tax % | Tax Incl.                           | Received   | Paid       | Rem |
|----------|---------------|--------------|----------|--------|-------|-------------------------------------|------------|------------|-----|
| Coach1   | 2             | Face to face | GBP      | 200.00 | 17.50 | <input checked="" type="checkbox"/> | 08/03/2004 | 08/03/2004 |     |

## Training/CPD

This is where you can record the details of all the training and CPD you undertake.

The information in the top section of the panel is display only and comes from the information you entered in the [Companies](#) panel where you checked the Training Provider checkbox.

To select the record (Training Provider) you wish to enter information for use the navigation buttons at the bottom of the panel.



Once you have selected the record for which you want to enter session details, this information is entered directly into the data grid in the lower half of the panel and is covered in the [Data Grids](#) section.

The screenshot shows the 'Coaching Log' application window. The 'Training and CPD' panel is active, displaying a form for entering training details. The form is divided into two main sections: 'Name and Address' and 'Telephone, Fax, e-mail and web'. Below these is a 'Details and Qualifications' section with 'Details' and 'Notes' tabs. The 'Details' tab is selected, showing a table for 'Training and Development'.

**Coaching Log**

File Edit Database Help

Training

### Training and CPD

**Name and Address**

Training Provider 1  
Address1  
  
City  
UNITED KINGDOM

**Telephone, Fax, e-mail and web**

Tel 1:  
Tel 2:  
Fax:  
E-mail:  
Web:

**Details and Qualifications**

Details Notes

**Training and Development**

|   | Name     | Type      | Start Date | End Date   | # of Hrs. | # of Days | Credits | Qualifica  |
|---|----------|-----------|------------|------------|-----------|-----------|---------|------------|
| ▶ | Course 1 | Full Time | 03/04/2004 | 04/04/2004 |           | 2.00      |         | Certificat |
|   | Course 2 | Part Time | 06/09/2004 | 06/09/2004 | 4.00      |           |         |            |
| * |          |           |            |            |           |           |         |            |

Navigation buttons: < << < 1 of 2 > >> >

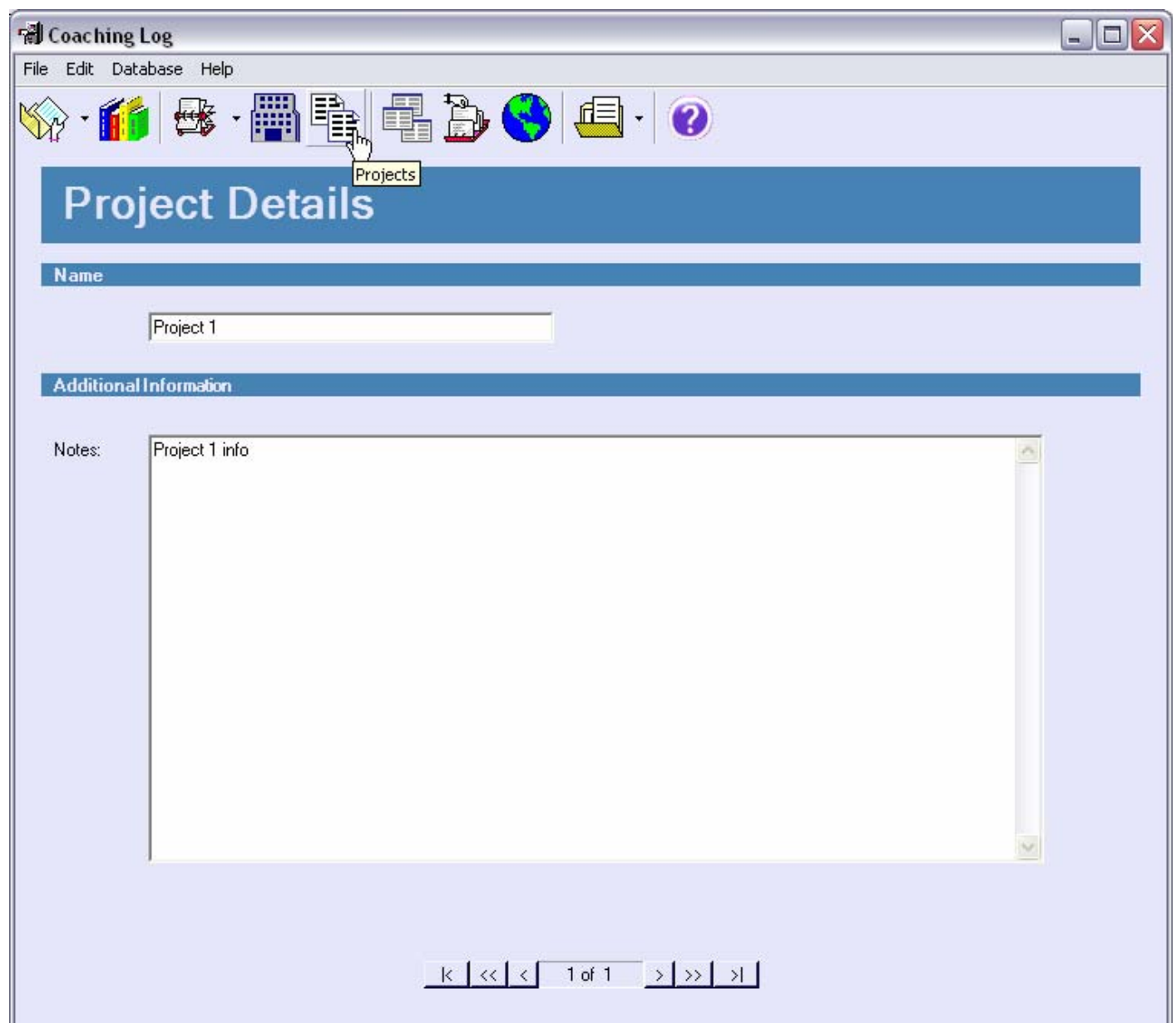
## Projects

This is where you can record the details of any specific projects you may wish to associate any sessions with in order to add more detail to your records should you wish.

The project names entered here can be selected from the drop down list that appears when you click in the Project cell in the [Sessions As Coach](#) and [Sessions As Coachee](#) data grids.

You select the record (Project) you wish to enter information for by using the navigation buttons at the bottom of the panel.

Navigation buttons: |< << < 1 of 1 > >> >|



The screenshot shows the 'Coaching Log' application window. The title bar includes 'File Edit Database Help'. The menu bar contains icons for a folder, books, a document with a pencil, a building, a document with a magnifying glass (labeled 'Projects'), a document with a printer, a globe, a folder, and a question mark. The main area is titled 'Project Details' in a blue header. Below this is a 'Name' field containing 'Project 1'. Underneath is an 'Additional Information' section with a 'Notes:' label and a large text area containing 'Project 1 info'. At the bottom of the window are navigation buttons: |< << < 1 of 1 > >> >|.

**Project Details**

Name

Project 1

**Additional Information**

Notes: Project 1 info

Navigation buttons: |< << < 1 of 1 > >> >|

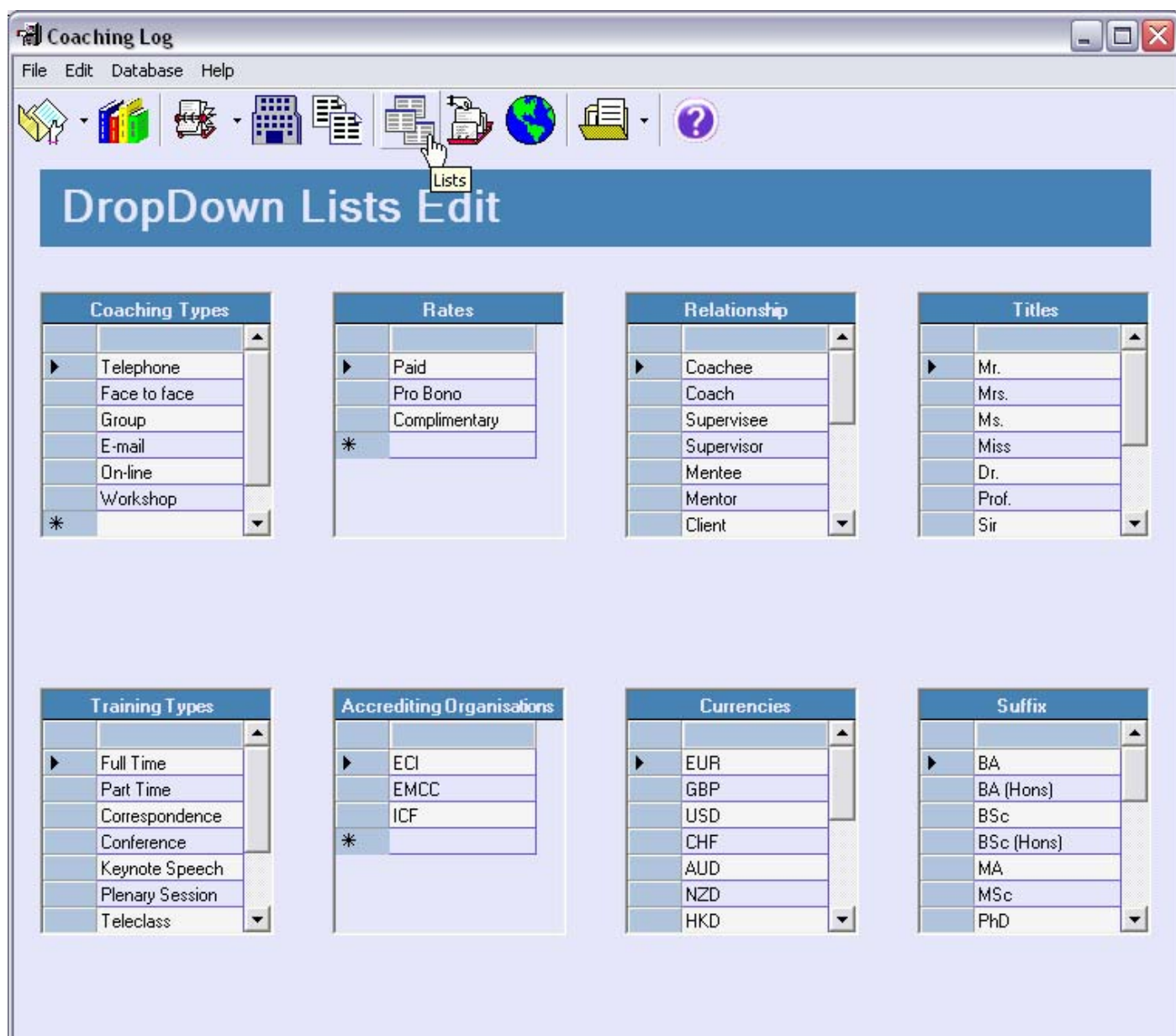
## Drop Down Lists

This is where you can enter any details you wish to see in the drop down lists that appear when you click the ▼ buttons on the various panels.

**Note:** To ensure database integrity, it is only possible to add new entries to the lists. It is not possible to alter or delete any entry so, if you make an error, it is not possible to correct it after it has been saved.

In view of this, it is recommended that you **make a backup copy of your database before adding any entries to these lists**. In the event you make a mistake you can roll back simply by restoring the database.

To enter data you simply click in the cell in the list in which you want the new data to appear, enter the data and save the record.



The screenshot shows the 'Coaching Log' application window with the 'DropDown Lists Edit' panel. The panel contains eight lists for editing:

- Coaching Types**: Telephone, Face to face, Group, E-mail, On-line, Workshop, \*
- Rates**: Paid, Pro Bono, Complimentary, \*
- Relationship**: Coachee, Coach, Supervisee, Supervisor, Mentee, Mentor, Client
- Titles**: Mr., Mrs., Ms., Miss, Dr., Prof., Sir
- Training Types**: Full Time, Part Time, Correspondence, Conference, Keynote Speech, Plenary Session, Teleclass
- Accrediting Organisations**: ECI, EMCC, ICF, \*
- Currencies**: EUR, GBP, USD, CHF, AUD, NZD, HKD
- Suffix**: BA, BA (Hons), BSc, BSc (Hons), MA, MSc, PhD

## Countries

This panel is primarily for reference and covers, amongst others, the ISO currency codes and international dialing codes.

If you wish to add to or alter any of the records you can simply by entering the new information and saving the record.

You select the record (Country) you wish to view information for by using the navigation buttons at the bottom of the panel.

|< |<< |< | 1 of 231 |> |>> |>|

The screenshot shows a software window titled 'Coaching Log' with a menu bar (File, Edit, Database, Help) and a toolbar with various icons. The main area is titled 'Countries' in a blue header. Below the header, there is a 'Country:' label followed by a text input field containing 'AFGHANISTAN'. To the right of the input field is a small flag of Afghanistan. Below this, there are two columns of information. The left column is titled 'ISO Country Codes' and contains three rows: '2 Character ISO code:' with input 'AF', '3 Character ISO code:' with input 'AFG', and 'ISO Country Number:' with input '4'. The right column is titled 'ISO Currency Codes' and contains three rows: 'ISO Currency Code:' with input 'AFN', 'ISO Currency No.:' with input '971', and 'Currency:' with input 'Afghani'. Below these columns, there are two more sections. The left section is titled 'Telephone \* = Member of North America Numbering Plan' and contains 'International Dialing Code:' with input '93'. The right section is titled 'Web' and contains 'IANA Country Level Domain:' with an empty input field. At the bottom of the window, there is a navigation bar with buttons: |< |<< |< | 1 of 231 |> |>> |>|.

Coaching Log

File Edit Database Help

Countries

Country: AFGHANISTAN

ISO Country Codes

2 Character ISO code: AF

3 Character ISO code: AFG

ISO Country Number: 4

ISO Currency Codes

ISO Currency Code: AFN

ISO Currency No.: 971

Currency: Afghani

Telephone \* = Member of North America Numbering Plan

International Dialing Code: 93

Web

IANA Country Level Domain:

|< |<< |< | 1 of 231 |> |>> |>|

## Data Grids

On the [Prospects](#), [Coachee Sessions And Invoices](#), [Coach Sessions And Invoices](#) and [Training and CPD](#) panels, in order to display the details regarding activities with a prospect, sessions and invoices for a coachee or coach and training/CPD with a training provider in an 'at a glance' format, data grids have been used and appear in the lower half of the various panels.

The layout of the data grid is similar to that of a spreadsheet as it is comprised of columns and rows, with each row corresponding to a record in the database.

## Entering Data

In order to maintain database integrity a number of the cells in the data grids present the user with calendars or [drop down lists](#) from which to select the desired value, similarly to that described previously.

With all data grids you can modify the data already entered by clicking on a cell in an existing row and either select a new value from the calendar or drop down list, or enter the new value directly where the cell allows it e.g. session duration, invoice reference number (Ref. No.), fee and tax amounts, invoice terms, notes etc., or you can create a new record by clicking in a cell in the blank row at the bottom of the data grid.

## Date Cells

Clicking in any date cell will open a pop-up calendar.

You select the date in the calendar by clicking on it and can scroll through the months by clicking the arrow buttons at the left and right sides of the calendar header. You can scroll quickly through years by clicking the buttons that appear when clicking on the year in the calendar header.



Once you click on the date in the calendar, the calendar will disappear and the date will be plugged into the cell you clicked on that opened the calendar.

**Note:** There are some date cells that stay blank once the calendar disappears. The date selected is actually plugged into the cell and will be displayed when you move to the next cell.

| Coachee Sessions |      |           |      |  | October 2004      |     |     |     |     |     |     | Invoice No.: Notes Project |  |  |
|------------------|------|-----------|------|--|-------------------|-----|-----|-----|-----|-----|-----|----------------------------|--|--|
| Date             | min. | Type      | Rat  |  | Mon               | Tue | Wed | Thu | Fri | Sat | Sun |                            |  |  |
| 12/04/2004       | 30   | Telephone | Corr |  | 27                | 28  | 29  | 30  | 1   | 2   | 3   |                            |  |  |
| 19/04/2004       | 45   | Telephone | Paic |  | 4                 | 5   | 6   | 7   | 8   | 9   | 10  | Inv1                       |  |  |
| 26/04/2004       | 45   | Telephone | Paic |  | 11                | 12  | 13  | 14  | 15  | 16  | 17  | Inv1                       |  |  |
| 03/05/2004       | 45   | Telephone | Paic |  | 18                | 19  | 20  | 21  | 22  | 23  | 24  | Inv1                       |  |  |
| 10/05/2004       | 45   | Telephone | Paic |  | 25                | 26  | 27  | 28  | 29  | 30  | 31  | Inv1                       |  |  |
| 07/07/2004       | 60   | Telephone | Paic |  | 1                 | 2   | 3   | 4   | 5   | 6   | 7   | Inv2                       |  |  |
| 12/08/2004       | 60   | Telephone | Paic |  | Today: 23/10/2004 |     |     |     |     |     |     | Inv4                       |  |  |

## Drop Down List Cells

These cells are those where you enter repetitive data e.g. session Type, fee Rate, Currency etc. or where you are required to select from a drop down list of previously entered data e.g. Invoice No.

Clicking in any of these cells for the first time will display an empty drop down list box with an arrow button to its right, as shown below.

If the drop down list has been displayed previously, the drop down list box will display the first value in the drop down list.

**Coaching Log**

File Edit Database Help

**Coachee Sessions and Invoices**

**Name**  
Mr. FirstName1 LastName1

**Telephone, Fax and e-mail**  
Tel: Telephone  
Fax:  
E-mail: EmailAddress

**Other Information**  
Company:  
Department:  
Birthday:

**Sessions and Invoices**  
Sessions Session Notes Invoices Invoice Notes

**Coachee Sessions**

| Date       | min. | Type      | Rate          | Invoice To: | Invoice No.: | Notes | Project |
|------------|------|-----------|---------------|-------------|--------------|-------|---------|
| 12/04/2004 | 30   | Telephone | Complimentary |             |              |       |         |
| 19/04/2004 | 45   | Telephone | Paid          | LastName1   | Inv1         |       |         |
| 26/04/2004 | 45   | Telephone | Paid          | LastName1   | Inv1         |       |         |
| 03/05/2004 | 45   | Telephone | Paid          | LastName1   | Inv1         |       |         |
| 10/05/2004 | 45   | Telephone | Paid          | LastName1   | Inv1         |       |         |
| 07/07/2004 | 60   | Telephone | Paid          | LastName1   | Inv2         |       |         |
| 12/08/2004 | 60   | Telephone | Paid          | LastName1   | Inv4         |       |         |

1 of 2

To select the value to be plugged into the cell, click the arrow button to display the drop down list box and click on the value in the list you want plugged into the cell.

The drop down list will disappear leaving the drop down list box with the selected value displayed.

The drop down list box will disappear and the selected value will be plugged into the cell when you move to the next cell.

**Coaching Log**

File Edit Database Help

**Coachee Sessions and Invoices**

**Name**  
Mr. FirstName1 LastName1

**Telephone, Fax and e-mail**  
Tel: Telephone  
Fax:  
E-mail: EmailAddress

**Other Information**  
Company:  
Department:  
Birthday:

**Sessions and Invoices**  
Sessions Session Notes Invoices Invoice Notes

**Coachee Sessions**

|  | Date       | min. | Type      | Rate          | Invoice To: | Invoice No.: | Notes | Project |
|--|------------|------|-----------|---------------|-------------|--------------|-------|---------|
|  | 19/04/2004 | 45   | Telephone | Paid          | LastName1   | Inv1         |       |         |
|  | 26/04/2004 | 45   | Telephone | Paid          | LastName1   | Inv1         |       |         |
|  | 03/05/2004 | 45   | Telephone | Paid          | LastName1   | Inv1         |       |         |
|  | 10/05/2004 | 45   | Telephone | Paid          | LastName1   | Inv1         |       |         |
|  | 07/07/2004 | 60   | Telephone | Paid          | LastName1   | Inv2         |       |         |
|  | 12/08/2004 | 60   | Telephone | Paid          | LastName1   | Inv4         |       |         |
|  |            |      |           | Complimentary |             |              |       |         |
|  |            |      |           | Paid          |             |              |       |         |

Paid  
Pro Bono  
Complimentary

1 of 2

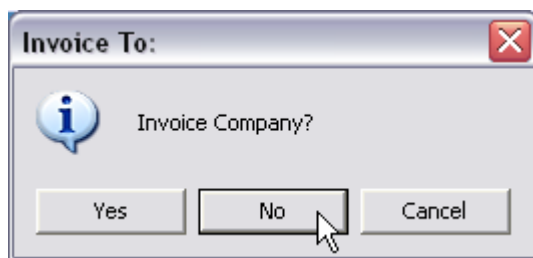
## Invoice To: and Invoiced By: Cells

These cells appear in the Coachee Sessions and Invoices and Coach Sessions and Invoices data grids and operate similarly to the drop down list cells described earlier in as much as you are required to select the information to be plugged into the cell rather than entering it manually.

The difference with these cells is that they first ask whether you are invoicing or being invoiced by a company and, as a result of your response, require you to select the company or person you are invoicing or being invoiced by from the presented company or people records.

Here we will look at the operation of the Invoice To: cell in the Coachee Sessions and Invoices data grid.

Clicking in this cell presents you with this dialog box.



Clicking No takes you to this panel.

**Coaching Log**

File Edit Database Help

**People**

**Name**

Title:  First Name:  Last Name:  Suffix:

**Address**

Address 1:   
Address 2:   
Town:   
City:   
ZIP:   
State:   
Country:

**Telephone, Fax, e-mail and web**

Tel 1:   
Tel 2:   
Fax:   
E-mail 1:   
E-mail 2:   
Web 1:   
Web 2:

**Company**

Name:   
Dept:

**Additional Information**

Relation:  B'day:   
Notes:

**Confidentiality**

Reference:

**ICF Reports**

Client Hours: ☒  
Letters Of Reference: ☒

Select Person and Click OK

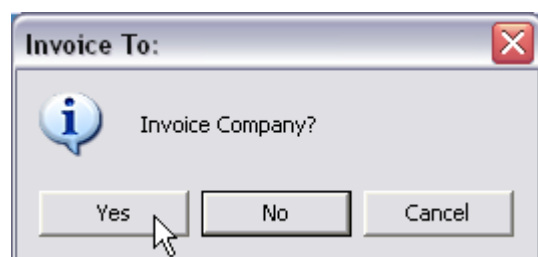
OK

< << < 1 of 4 > >> >

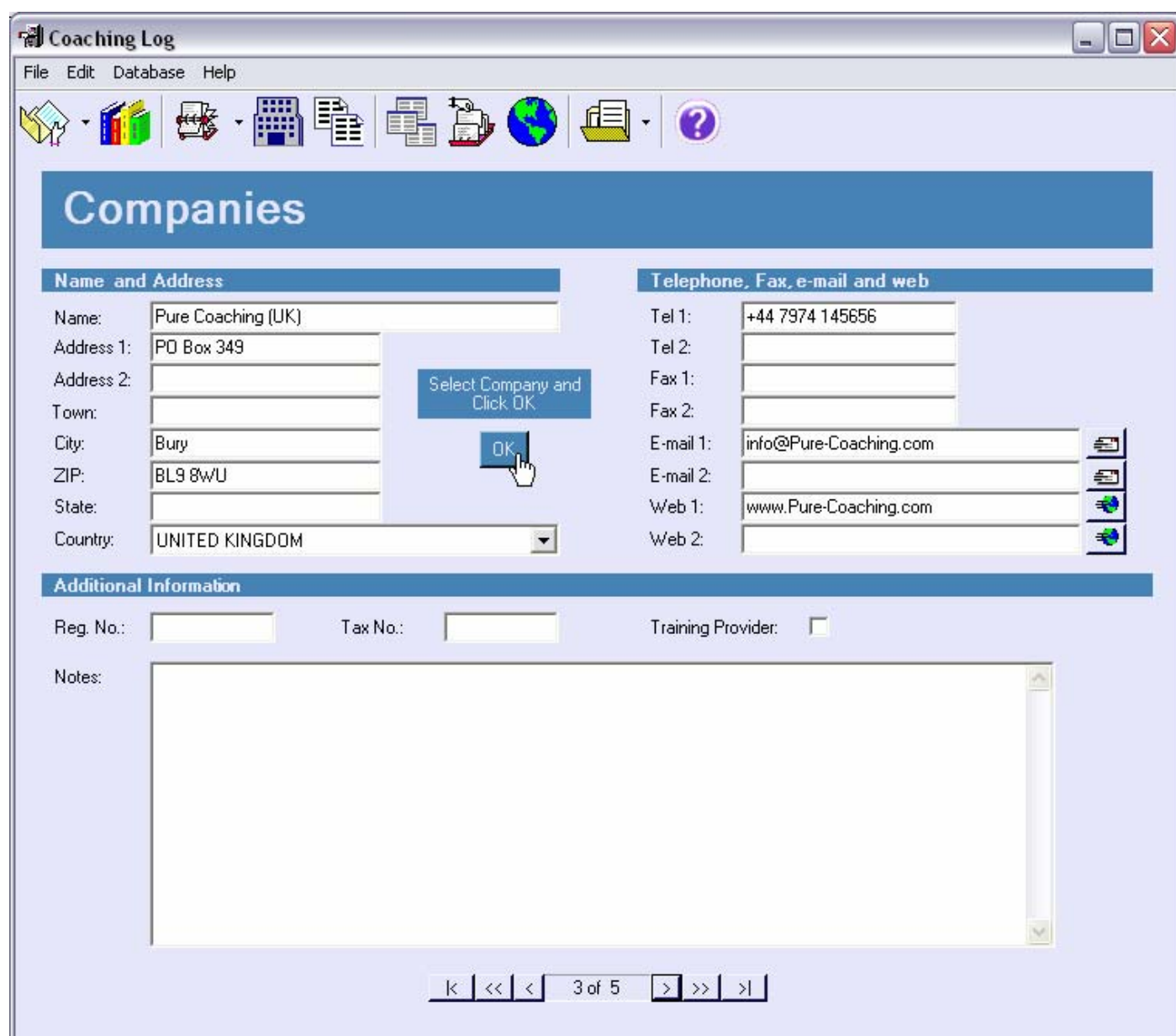
Navigate to the record for the person you are raising the invoice for via the navigation buttons at the bottom of the panel and then click OK.

You will be returned to the Coachee Sessions and Invoices panel and the person's last name, as entered in the Last Name field on the [People](#) panel, will be plugged into the Invoice To: cell.

Clicking Yes on this dialog box



takes you to this panel.

The "Coaching Log" application window shows the "Companies" panel. The window has a menu bar (File, Edit, Database, Help) and a toolbar with various icons. The "Companies" panel is divided into several sections. The "Name and Address" section contains fields for Name (Pure Coaching (UK)), Address 1 (PO Box 349), Address 2, Town, City (Bury), ZIP (BL9 8WU), State, and Country (UNITED KINGDOM). The "Telephone, Fax, e-mail and web" section contains fields for Tel 1 (+44 7974 145656), Tel 2, Fax 1, Fax 2, E-mail 1 (info@Pure-Coaching.com), E-mail 2, Web 1 (www.Pure-Coaching.com), and Web 2. A blue button labeled "Select Company and Click OK" is positioned between the two sections, with an "OK" button below it. The "Additional Information" section at the bottom has fields for Reg. No., Tax No., and Training Provider (with a checkbox), and a large "Notes" text area. At the very bottom of the window is a navigation bar with buttons for back, previous, next, and forward, along with a "3 of 5" indicator.

Navigate to the record for the company you are raising the invoice for via the navigation buttons at the bottom of the panel and then click OK.

You will be returned to the Coachee Sessions and Invoices panel and the company's name, as entered in the Name field on the Company panel, will be plugged into the Invoice To: cell.

## **Invoice No.: Cells**

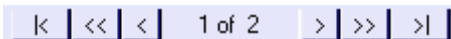
These cells appear in the Coachee Sessions and Invoices and Coach Sessions and Invoices data grids and operate similarly to the drop down list cells described earlier in as much as you are required to select the information to be plugged into the cell rather than entering it manually.

The operation of these cells is treated separately here as the values appearing in the drop down list are the invoice reference numbers you allocate when entering your invoice data described below.

## **Entering Invoice Data**

Invoice data is entered via the Coachee Invoices or Coach Invoices data grids according whether it is an invoice you are raising for sessions you have had with your coachee or an invoice you have received from your coach for sessions you have had with them. The process is identical except for the name of the invoice date cell that is called Sent for invoices you raise and Received for those you receive. The process for raising an invoice for a coachee is described below.

Firstly select the coachee you wish to enter invoice data for by using the navigation buttons at the bottom of the panel.



**The minimum amount of data you must enter is:**

**Ref. No., Type, Currency and the Sent date.**

The Ref. No. cell is a text cell where you can enter information directly and the invoice reference number is any number you wish to assign to your invoice according your internal administration procedures. Type and Currency values are selected from [drop down lists](#) and the Sent date is selected from a [pop-up calendar](#) as described earlier.

# of sessions, Amount, Tax % and Terms are text cells where you can enter information directly.

**Coaching Log**

File Edit Database Help

**Coachee Sessions and Invoices**

**Name**  
Mr. FirstName1 LastName1

**Telephone, Fax and e-mail**  
Tel: Telephone  
Fax:  
E-mail: EmailAddress

**Other Information**  
Company:  
Department:  
Birthday:

**Sessions and Invoices**  
Sessions Session Notes **Invoices** Invoice Notes

**Coachee Invoices**

|   | Ref. No. | # of Sessions | Type      | Currency | Amount | Tax % | Tax Incl.                           | Terms | Sent       | Received |
|---|----------|---------------|-----------|----------|--------|-------|-------------------------------------|-------|------------|----------|
| ▶ | Inv1     | 4             | Telephone | GBP      | 320.00 | 17.50 | <input type="checkbox"/>            | 10    | 14/05/2004 |          |
|   | Inv2     | 1             | Telephone | GBP      | 100.00 | 17.50 | <input checked="" type="checkbox"/> | 10    | 09/07/2004 |          |
| * |          |               |           |          |        |       |                                     |       |            |          |

Navigation buttons: back, previous, first, 1 of 2, next, last, forward.

## Tying The Invoice To Sessions

Once you have entered your invoice data and in order the invoice data will appear in the invoice report, it is necessary to tie the invoice to at least one session for this coachee.

Here we have created an invoice reference Inv4 for payment in advance for a series of 4 telephone sessions. Payment has not yet been received.

The screenshot shows the 'Coaching Log' application window. The title bar reads 'Coaching Log'. The menu bar includes 'File', 'Edit', 'Database', and 'Help'. The toolbar contains icons for folders, documents, a printer, a globe, and a help icon. The main window has a blue header bar with the text 'Coachee Sessions and Invoices'.

Below the header, there are several sections:

- Name:** Mr. FirstName1 LastName1
- Telephone, Fax and e-mail:** Tel: Telephone, Fax: , E-mail: EmailAddress
- Other Information:** Company: , Department: , Birthday:

Below these sections is a tabbed interface with four tabs: 'Sessions', 'Session Notes', 'Invoices', and 'Invoice Notes'. The 'Invoices' tab is currently selected.

The 'Invoices' tab displays a table titled 'Coachee Invoices' with the following columns: Ref. No., # of Sessions, Type, Currency, Amount, Tax %, Tax Incl., Terms, Sent, and Received.

| Ref. No. | # of Sessions | Type      | Currency | Amount | Tax % | Tax Incl.                           | Terms | Sent       | Received |
|----------|---------------|-----------|----------|--------|-------|-------------------------------------|-------|------------|----------|
| Inv1     | 4             | Telephone | GBP      | 320.00 | 17.50 | <input type="checkbox"/>            | 10    | 07/11/2004 |          |
| Inv2     | 1             | Telephone | GBP      | 100.00 | 17.50 | <input checked="" type="checkbox"/> | 10    | 09/07/2004 |          |
| Inv4     | 4             | Telephone | GBP      | 320.00 | 17.50 | <input checked="" type="checkbox"/> | 5     | 05/11/2004 |          |
| *        |               |           |          |        |       |                                     |       |            |          |

At the bottom of the window, there is a navigation bar with buttons for 'K', '<<', '<', '1 of 2', '>', '>>', and '>|'.

To tie this invoice to a session for this coachee, go to the Coachee Sessions data grid by clicking the Sessions button at the top left of the Coachee Invoices data grid.

**Coaching Log**

File Edit Database Help

**Coachee Sessions and Invoices**

**Name**  
Mr. FirstName1 LastName1

**Telephone, Fax and e-mail**  
Tel: Telephone  
Fax:   
E-mail: EmailAddress

**Other Information**  
Company:   
Department:   
Birthday:

**Sessions and Invoices**  
Sessions Session Notes Invoices Invoice Notes

**Coachee Sessions**

|   | Date       | min. | Type      | Rate          | Invoice To: | Invoice No.: | Notes | Project |
|---|------------|------|-----------|---------------|-------------|--------------|-------|---------|
| ▶ | 12/04/2004 | 30   | Telephone | Complimentary |             |              |       |         |
|   | 19/04/2004 | 45   | Telephone | Paid          | LastName1   | Inv1         |       |         |
|   | 26/04/2004 | 45   | Telephone | Paid          | LastName1   | Inv1         |       |         |
|   | 03/05/2004 | 45   | Telephone | Paid          | LastName1   | Inv1         |       |         |
|   | 10/05/2004 | 45   | Telephone | Paid          | LastName1   | Inv1         |       |         |
|   | 07/07/2004 | 60   | Telephone | Paid          | LastName1   | Inv2         |       |         |
| * |            |      |           |               |             |              |       |         |

1 of 2

As this invoice is for sessions yet to be delivered it is necessary to enter data for a new session to tie the invoice to.

**The minimum amount of data you must enter is:**

**Date and Rate (Rate must be Paid).**

If the date for the first session of this series of 4 has not yet been fixed simply enter today's date as this can be altered later.

Once you have entered your session information click in the Invoice No. cell and select the reference number for the invoice you just created from the drop down list.

Now save the record.

This invoice will now appear in the invoice reports for this coachee.

To generate an invoice report see [Reports Invoices](#).

**Coaching Log**

File Edit Database Help

**Coachee Sessions and Invoices**

**Name**  
Mr. FirstName1 LastName1

**Telephone, Fax and e-mail**  
Tel: Telephone  
Fax:  
E-mail: EmailAddress

**Other Information**  
Company:  
Department:  
Birthday:

**Sessions and Invoices**  
Sessions Session Notes Invoices Invoice Notes

**Coachee Sessions**

|   | Date       | min. | Type      | Rate          | Invoice To: | Invoice No.: | Notes | Project |
|---|------------|------|-----------|---------------|-------------|--------------|-------|---------|
|   | 12/04/2004 | 30   | Telephone | Complimentary |             |              |       |         |
|   | 19/04/2004 | 45   | Telephone | Paid          | LastName1   | Inv1         |       |         |
|   | 26/04/2004 | 45   | Telephone | Paid          | LastName1   | Inv1         |       |         |
|   | 03/05/2004 | 45   | Telephone | Paid          | LastName1   | Inv1         |       |         |
|   | 10/05/2004 | 45   | Telephone | Paid          | LastName1   | Inv1         |       |         |
|   | 07/07/2004 | 60   | Telephone | Paid          | LastName1   | Inv2         |       |         |
| ▶ | 05/11/2004 |      | Telephone | Paid          |             |              |       |         |
| * |            |      |           |               |             |              |       |         |

Inv1  
Inv2  
Inv3  
Inv4

1 of 2

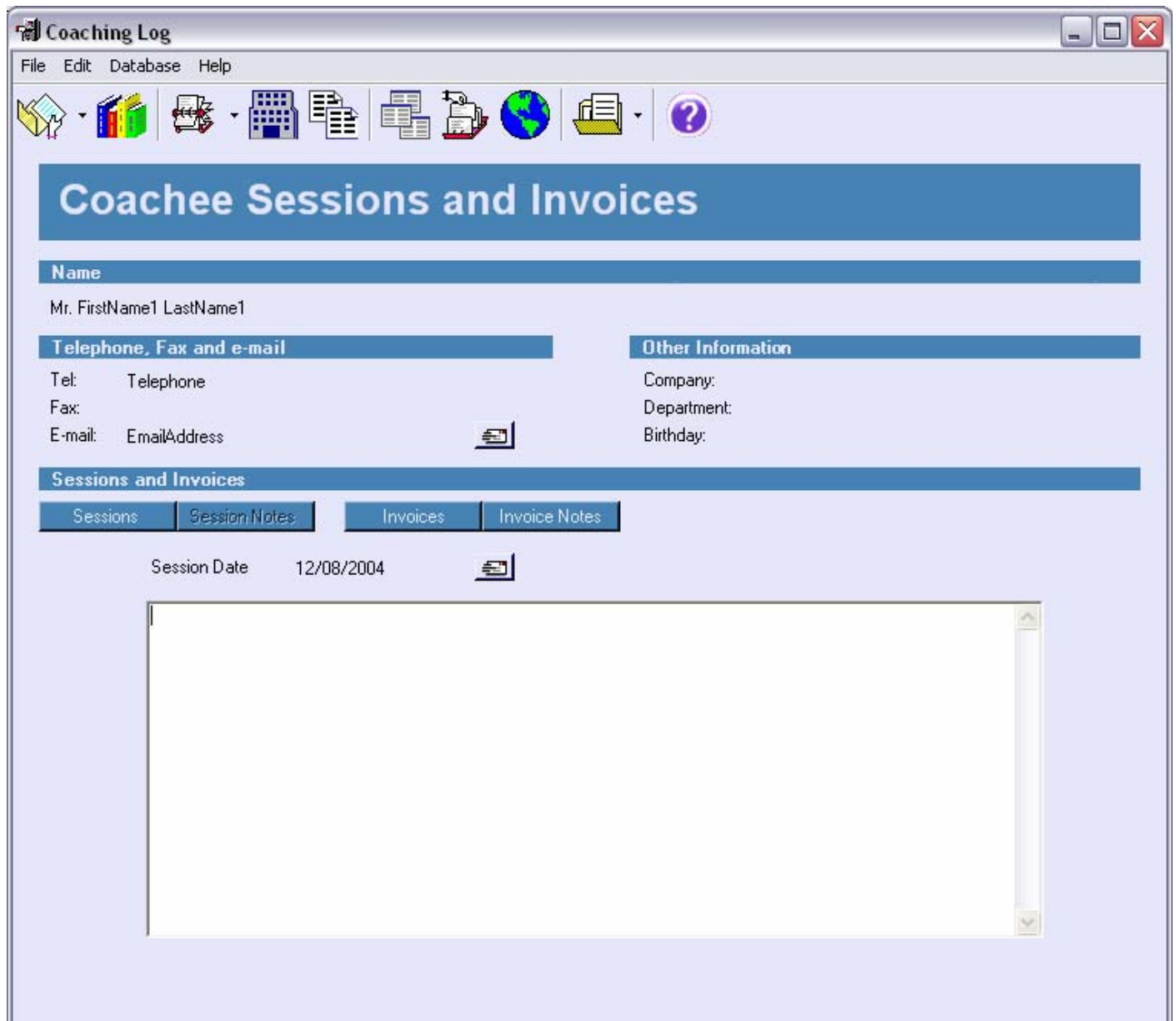
## Notes

There are several data grids where you will find Notes cells.

These cells display the first couple of words of any notes you make in that record so you can see, at a glance, where you have made notes.

The notes themselves are entered in a large text field on a separate panel that is accessed either by clicking in the Notes cell in the data grid or by clicking the Notes button above the data grid to the left.

Either of these will open a notes field like this.



The screenshot shows a window titled "Coaching Log" with a menu bar (File, Edit, Database, Help) and a toolbar with various icons. The main content area is titled "Coachee Sessions and Invoices". It contains several sections:

- Name:** A text field containing "Mr. FirstName1 LastName1".
- Telephone, Fax and e-mail:** Fields for "Tel: Telephone", "Fax:", and "E-mail: EmailAddress".
- Other Information:** Fields for "Company:", "Department:", and "Birthday:". There is a small icon to the right of the "E-mail" field.
- Sessions and Invoices:** A section with four buttons: "Sessions", "Session Notes", "Invoices", and "Invoice Notes".
- Session Date:** A text field containing "12/08/2004" with a small icon to its right.
- Notes Field:** A large, empty text area with a vertical scrollbar on the right side.

In the above example, notes for sessions with your coachees, the session date is displayed so you can be sure you are entering notes for the correct session.

There is a button to the right of the session date that, when clicked, copies the contents of the notes field to the clipboard, launches your default e-mail client and creates a new mail addressed to your coachee into which you can simply paste the notes and click send.

## Deleting Rows

To delete a row (record) from the data grid, simply click in the blue oblong to the left of the row you wish to delete. The row is then highlighted as shown below.

**Coaching Log**

File Edit Database Help

**Coachee Sessions and Invoices**

**Name**  
Mr. FirstName1 LastName1

**Telephone, Fax and e-mail**  
Tel: Telephone  
Fax:  
E-mail: EmailAddress

**Other Information**  
Company:  
Department:  
Birthday:

**Sessions and Invoices**  
Sessions Session Notes Invoices Invoice Notes

**Coachee Sessions**

|     | Date       | min. | Type      | Rate          | Invoice To: | Invoice No.: | Notes | Project |
|-----|------------|------|-----------|---------------|-------------|--------------|-------|---------|
|     | 12/04/2004 | 30   | Telephone | Complimentary |             |              |       |         |
|     | 19/04/2004 | 45   | Telephone | Paid          | LastName1   | Inv1         |       |         |
|     | 26/04/2004 | 45   | Telephone | Paid          | LastName1   | Inv1         |       |         |
|     | 03/05/2004 | 45   | Telephone | Paid          | LastName1   | Inv1         |       |         |
|     | 10/05/2004 | 45   | Telephone | Paid          | LastName1   | Inv1         |       |         |
| ▶ * | 07/07/2004 | 60   | Telephone | Paid          | LastName1   | Inv2         |       |         |

1 of 2

To delete the selected row simply hit the Delete key on your keyboard and the row will be deleted.

**Note:** The row will only be permanently deleted after you save the record (File Save).

If you delete a row by mistake you can restore it simply by clicking Edit Undo Unsaved Changes from the [main menu](#), as long as the record has not already been saved.

# Reports

## Sessions – By Coachee and All Coachees

You can generate session reports By Coachee, with or without session notes, or for All Coachees. Both reports can be limited to a date range or [left open](#) reporting all session information.

**Note:** In the example of the By Coachee report, the coachee for whom the report will be generated is the coachee currently selected in the Coachee Sessions panel.

**Coaching Log**

File Edit Database Help

**Coachee Sessions and Invoices**

Name: Mrs. CoacheeFirstName CoacheeLastName

Telephone, Fax and e-mail: Tel: CoacheeTel1, Fax: CoacheeFax, E-mail: CoacheeEmail1

Other Info: Company: , Department: , Birthday:

**Sessions and Invoices**

Sessions Session Notes Invoices Invoice Notes

**Coachee Sessions**

|   | Date       | min. | Type      | Rate | Invoice To:     | Invoice No.: | Notes       | Project |
|---|------------|------|-----------|------|-----------------|--------------|-------------|---------|
| ▶ | 12/08/2005 | 45   | Telephone | Paid | CoacheeLastName | CE1Inv01     | Test note 1 |         |
|   | 19/08/2005 | 45   | Telephone | Paid | CoacheeLastName | CE1Inv01     | Test note 2 |         |
|   | 26/08/2005 | 45   | Telephone | Paid | CoacheeLastName | CE1Inv01     |             |         |
|   | 02/09/2005 | 45   | Telephone | Paid | CoacheeLastName | CE1Inv01     |             |         |
|   | 09/09/2005 | 45   | Telephone | Paid | CoacheeLastName | CE1Inv02     |             |         |
|   | 16/09/2005 | 45   | Telephone | Paid | CoacheeLastName | CE1Inv03     |             |         |
| * |            |      |           |      |                 |              |             |         |

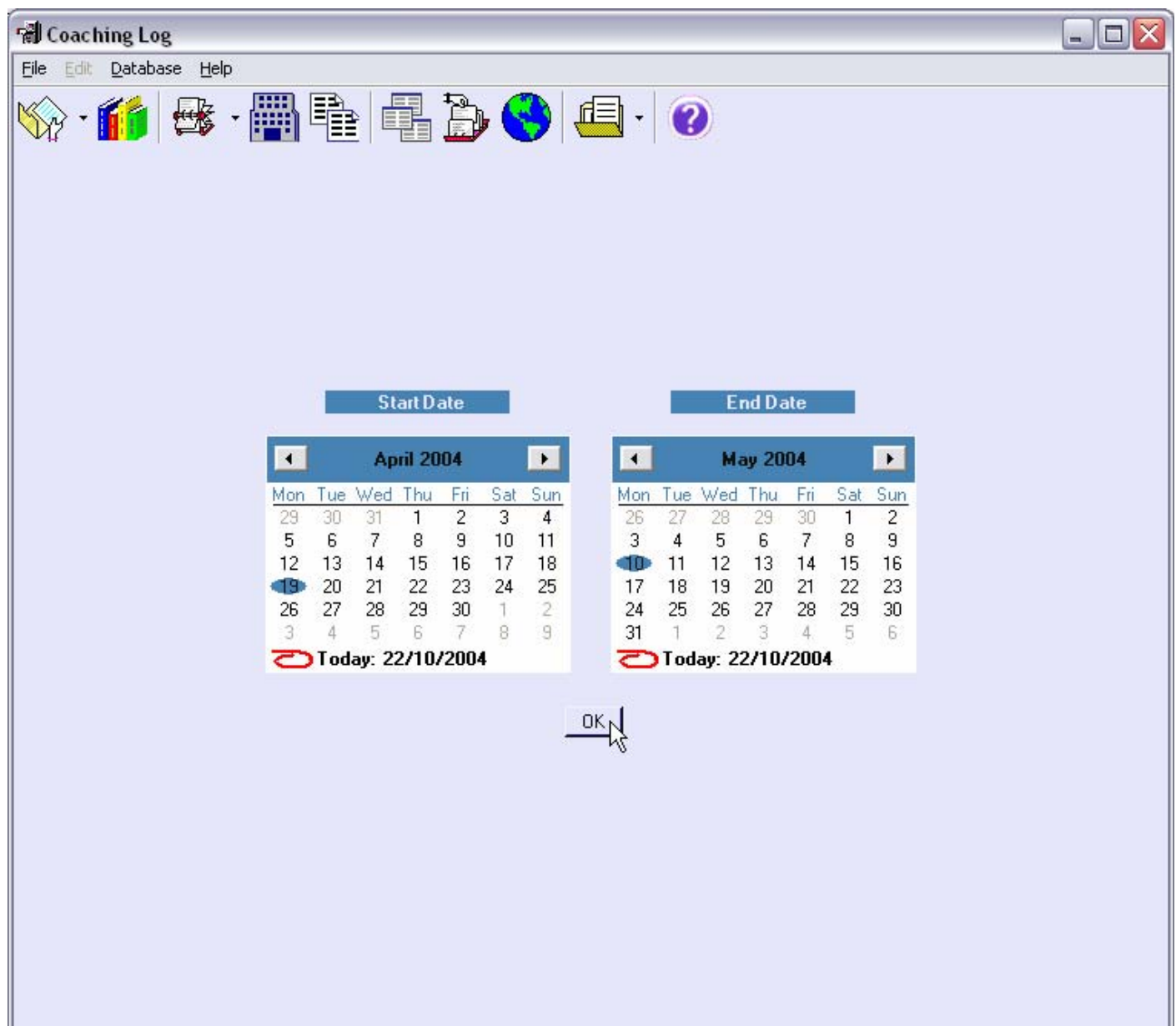
Navigation: < << < 1 of 3 > >> >

## Date Range

On selecting the report type: By Coachee or All Coachees, you will see this dialog box



Clicking Yes will display a panel with two calendars from which you select the start and end dates for the report, in this example 19/4/2004 to 10/5/2004.



You set the date in each calendar by clicking on it and can scroll through the months by clicking the arrow buttons at the left and right sides of the calendar header. You can scroll quickly through years by clicking the buttons that appear when clicking on the year in the calendar header.



When you have selected the dates **click OK**.

The report is generated.

The layout of the names and addresses in both the header and detail sections of the report are customisable via [Report Options](#). This will be covered separately later as will [Page Navigation](#), [Print](#), [Refresh](#), [Export](#), [Toggle Group Tree](#), [Zoom](#) and [Search Text](#).

The screenshot shows a window titled "Coaching Log" with a menu bar (File, Edit, Database, Help) and a toolbar with various icons. The main area displays a report titled "Coachee Sessions Report". The report includes a header section with the coach's name and address, a section for the client's details, and a table of sessions. The status bar at the bottom shows "Current Page No: 1", "Total Page No: 1", and "Zoom Factor: Page Width".

**Coachee Sessions Report**

Les Posner MA  
Pure Coaching (UK)  
PO Box 349  
Bury BL9 8WU  
UNITED KINGDOM

---

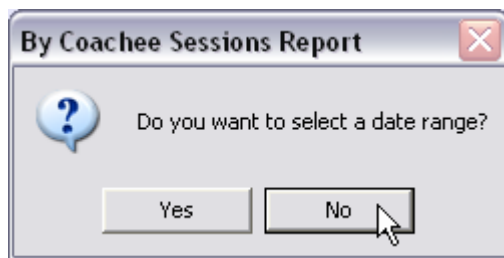
Mr. FirstName1 LastName1  
Address1  
Town  
City  
UNITED KINGDOM

| Date         | Type      | Rate | Duration (min.) |
|--------------|-----------|------|-----------------|
| 19/04/2004   | Telephone | Paid | 45              |
| 26/04/2004   | Telephone | Paid | 45              |
| 03/05/2004   | Telephone | Paid | 45              |
| 10/05/2004   | Telephone | Paid | 45              |
| Total (hrs.) |           |      | 3.00            |

Current Page No: 1      Total Page No: 1      Zoom Factor: Page Width

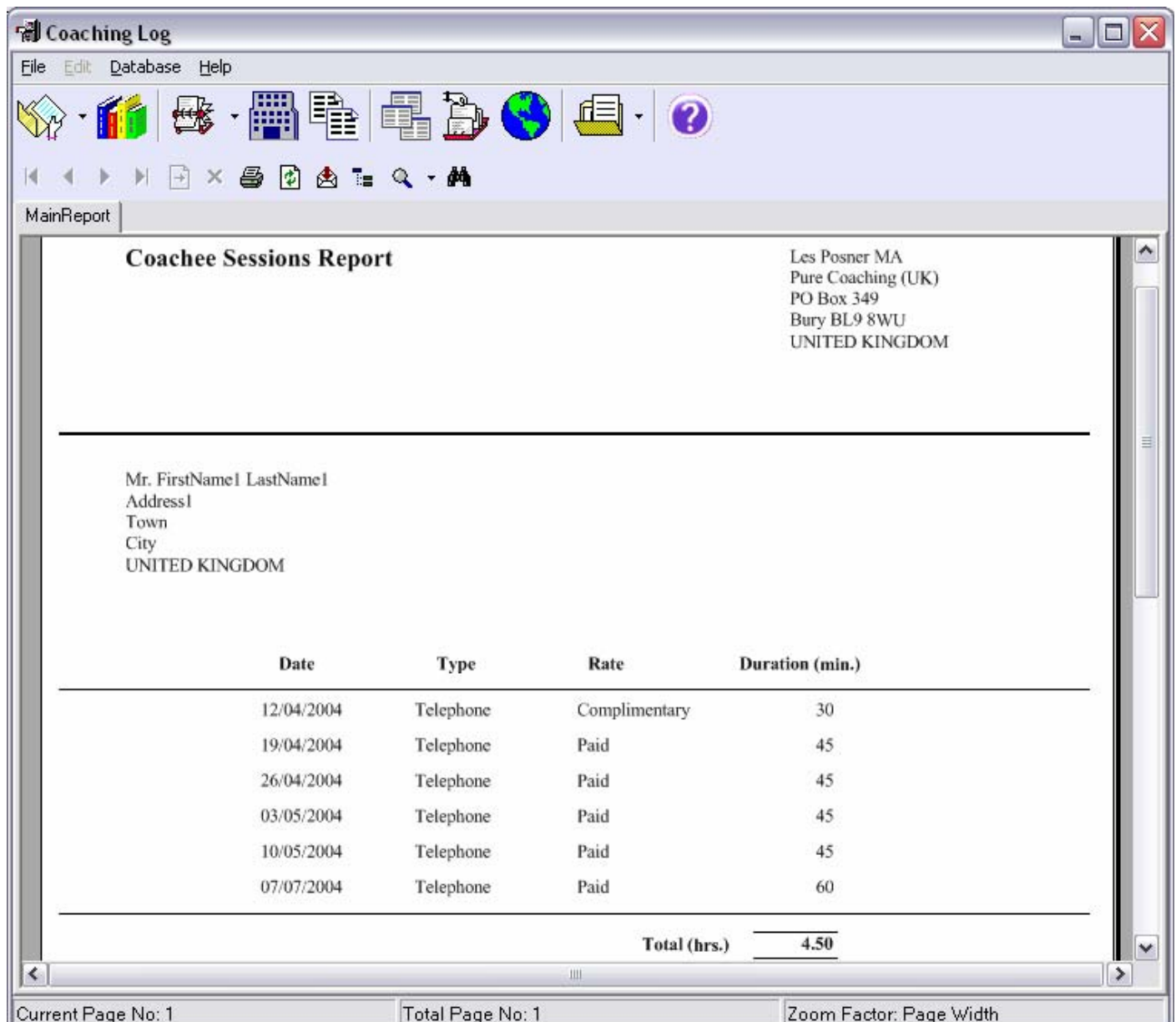
## No Date Range

On selecting the report type: By Coachee or All Coachees, you will see a dialog box asking you if you wish to select a date range.



Clicking No will generate the report directly.

The layout of the names and addresses in both the header and detail sections of the report are customisable via [Report Options](#). This will be covered separately later as will [Page Navigation](#), [Print](#), [Refresh](#), [Export](#), [Toggle Group Tree](#), [Zoom](#) and [Search Text](#).



The screenshot shows the 'Coaching Log' application window. The title bar reads 'Coaching Log'. The menu bar includes 'File', 'Edit', 'Database', and 'Help'. The toolbar contains various icons for file operations, navigation, and help. The main window displays a report titled 'Coachee Sessions Report'. The report header includes the name 'Les Posner MA' and the address 'Pure Coaching (UK), PO Box 349, Bury BL9 8WU, UNITED KINGDOM'. Below the header, there is a section for client details: 'Mr. FirstName1 LastName1', 'Address1', 'Town', 'City', and 'UNITED KINGDOM'. The main body of the report is a table with the following columns: 'Date', 'Type', 'Rate', and 'Duration (min.)'. The table contains six rows of session data. At the bottom of the table, the total duration is calculated as 'Total (hrs.) 4.50'. The status bar at the bottom of the window shows 'Current Page No: 1', 'Total Page No: 1', and 'Zoom Factor: Page Width'.

| Date       | Type      | Rate          | Duration (min.) |
|------------|-----------|---------------|-----------------|
| 12/04/2004 | Telephone | Complimentary | 30              |
| 19/04/2004 | Telephone | Paid          | 45              |
| 26/04/2004 | Telephone | Paid          | 45              |
| 03/05/2004 | Telephone | Paid          | 45              |
| 10/05/2004 | Telephone | Paid          | 45              |
| 07/07/2004 | Telephone | Paid          | 60              |

Total (hrs.) 4.50

## Sessions – By Coach and All Coaches

You can generate session reports By Coach or for All Coaches. Similar to the Coachee reports, both reports can be limited to a date range or left open reporting all session information.

**Note:** In the example of the By Coach report, the coach for whom the report will be generated is the coach currently selected in the Coach Sessions and Invoices panel.

Selecting a [Date Range](#) or [No Date Range](#) for the report is the same as described in [Sessions – By Coachee and All Coaches](#).

**Coaching Log**

File Edit Database Help

**Coach Sessions and Invoices**

Name: Mrs. FirstName2 LastName2

Telephone, Fax, e-mail and web: Tel: Fax: E-mail:

**Sessions and Invoices**

Sessions Session Notes Invoices Invoice Notes

**Coach Sessions**

|   | Date       | min. | Type         | Rate | Invoiced by: | Invoice No.: | Notes | Project |
|---|------------|------|--------------|------|--------------|--------------|-------|---------|
| ▶ | 08/03/2004 | 45   | Face to face | Paid | LastName2    | Coach1       |       |         |
|   | 05/04/2004 | 45   | Face to face | Paid | LastName2    | Coach1       |       |         |
| * |            |      |              |      |              |              |       |         |

Navigation: < << < 1 of 1 > >> >

# Training

You can generate reports detailing the training you have taken and the cost of that training.

You control the content of the reports by selecting which details you wish to appear by checking or un-checking the In Report? checkbox in the Training and CPD panel data grid.

**Coaching Log**

File Edit Database Help

**Training and CPD**

**Name and Address**

Training Provider 1  
Address1  
City  
UNITED KINGDOM

**Details and Qualifications**

Details Notes

**Training and Development**

|    | End Date   | # of Hrs. | # of Days | Credits | Qualification | Accredited by: | In Report?                          |
|----|------------|-----------|-----------|---------|---------------|----------------|-------------------------------------|
| 04 | 04/04/2004 |           | 2.00      |         | Certificate   |                | <input checked="" type="checkbox"/> |
| 04 | 06/05/2004 | 1.00      |           |         |               |                | <input type="checkbox"/>            |
| 04 | 06/09/2004 | 4.00      |           |         |               |                | <input checked="" type="checkbox"/> |
| *  |            |           |           |         |               |                |                                     |

1 of 2

## Personal CPD

This report lists the training you have taken grouped by training provider and then by date.

It provides details of the number of hours or days of each course, workshop or teleclass etc., the totals by training provider and what qualifications were granted.

The screenshot shows the 'Coaching Log' application window. The title bar reads 'Coaching Log'. The menu bar includes 'File', 'Edit', 'Database', and 'Help'. The toolbar contains various icons for file operations, navigation, and help. The 'MainReport' tab is selected. The report is titled 'Personal Continual Professional Development Report'. It lists the user's details: Les Posner MA, Pure Coaching (UK), PO Box 349, Bury BL9 8WU, UNITED KINGDOM. The report is structured into sections for different training providers, with columns for Programme Name, Start/End Dates, # of Hours, # of Days, and Qualification. The data is summarized by provider and then by grand totals.

| Programme Name by Training Provider | Start/End Dates       | # of Hours  | # of Days   | Qualification |
|-------------------------------------|-----------------------|-------------|-------------|---------------|
| <b>Training Provider 1</b>          |                       |             |             |               |
| Course 1                            | 03/04/2004 04/04/2004 |             | 2.0         | Certificate   |
| Course 2                            | 06/09/2004 06/09/2004 | 4.00        |             |               |
| <b>Total Days</b>                   |                       | <u>4.00</u> | <u>2.0</u>  |               |
| <b>Training Provider 2</b>          |                       |             |             |               |
| Course 1                            | 05/07/2004 09/10/2004 |             | 20.0        |               |
| <b>Total Days</b>                   |                       |             | <u>20.0</u> |               |
| <b>Grand Totals</b>                 |                       | <u>4.00</u> | <u>22.0</u> |               |

Current Page No: 1      Total Page No: 1      Zoom Factor: Page Width

## Personal CPD Cost

This report lists the training you have taken grouped by training provider and then by date.

It provides details of the cost of each course, workshop or teleclass etc., currency and totals by training provider.

The screenshot shows the 'Coaching Log' application window. The title bar reads 'Coaching Log'. The menu bar includes 'File', 'Edit', 'Database', and 'Help'. The toolbar contains various icons for file operations, database management, and help. The 'MainReport' tab is selected. The report is titled 'Personal CPD Cost Report' and includes the address: 'Les Posner MA, Pure Coaching (UK), PO Box 349, Bury BL9 8WU, UNITED KINGDOM'. The report is organized into two sections: 'Training Provider 1' and 'Training Provider 2'. Each section contains a table of courses with columns for 'Programme Name (by Training Provider)', 'Start/End Dates', 'Currency', and 'Amount'. The 'Total' for each provider is calculated and displayed at the end of the section.

| Programme Name (by Training Provider) | Start/End Dates       | Currency | Amount          |
|---------------------------------------|-----------------------|----------|-----------------|
| <b>Training Provider 1</b>            |                       |          |                 |
| Course 1                              | 03/04/2004 04/04/2004 | GBP      | 850.00          |
| Course 2                              | 06/09/2004 06/09/2004 | GBP      | 75.00           |
| <b>Total</b>                          |                       |          | <b>925.00</b>   |
| <b>Training Provider 2</b>            |                       |          |                 |
| Course 1                              | 05/07/2004 09/10/2004 | USD      | 2,500.00        |
| <b>Total</b>                          |                       |          | <b>2,500.00</b> |

Current Page No: 1      Total Page No: 1      Zoom Factor: Page Width

## ICF Credentialing Reports

You can simply and easily generate reports detailing the sessions you have had with your coachees and the letters of reference you have received from them in the format required by ICF for their credentialing process.

You control the content of the reports by selecting which coachee's details you wish to appear by checking or un-checking the relevant checkboxes at the bottom of the People panel.

The screenshot shows the 'Coaching Log' application window. The 'People' panel is active, displaying a form for entering coachee details. A dropdown menu is open, showing options for generating reports: Sessions, Training, ICF, Invoices, and Options. The 'ICF' option is selected, and a sub-menu is visible with 'Client Hours' and 'Letters of reference' options. The 'Client Hours' option is highlighted by the mouse cursor. The form includes fields for Name (Title, First Name, Last Name, Suffix), Address (Address 1, Address 2, Town, City, ZIP, State, Country), Telephone, Fax, e-mail, and web information, Company (Name, Dept), Additional Information (Relation, B'day, Notes), Confidentiality (Reference), and ICF Reports (Client Hours, Letters Of Reference checkboxes). The bottom of the window shows a navigation bar with '1 of 4' records.

**Coaching Log**

File Edit Database Help

**People**

Name

Title: Mr. First Name: FirstName1

Address

Address 1: Address1

Address 2:

Town: Town

City: City

ZIP:

State:

Country: UNITED KINGDOM

Telephone, Fax, e-mail and web

Tel 1: Telephone

Tel 2:

Fax:

E-mail 1: EmailAddress

E-mail 2:

Web 1:

Web 2:

Company

Name: Dept:

Additional Information

Relation: Coachee B'day:

Notes:

Confidentiality

Reference: 040015

ICF Reports

Client Hours: ☒

Letters Of Reference: ☒

1 of 4

## Client Hours

This report lists the names, start and end dates of the sessions, the number of hours of coaching, both paid and pro-bono, and contact information (Phone/email) for the coachees you selected.

These details are sorted by date (ascending).

The screenshot shows the 'Coaching Log' application window. The title bar reads 'Coaching Log'. The menu bar includes 'File', 'Edit', 'Database', and 'Help'. The toolbar contains various icons for file operations, database management, and help. The 'MainReport' tab is selected. The report is titled 'ICF Client-Coaching Hours Report'. In the top right corner, the address 'Les Posner MA, Pure Coaching (UK), PO Box 349, Bury BL9 8WU, UNITED KINGDOM' is displayed. The report table has the following columns: 'Client Name(s)', 'Start/End Date', 'Hours', 'Pro-Bono Hrs.', and 'Contact Information: Phone/email'. The data rows are as follows:

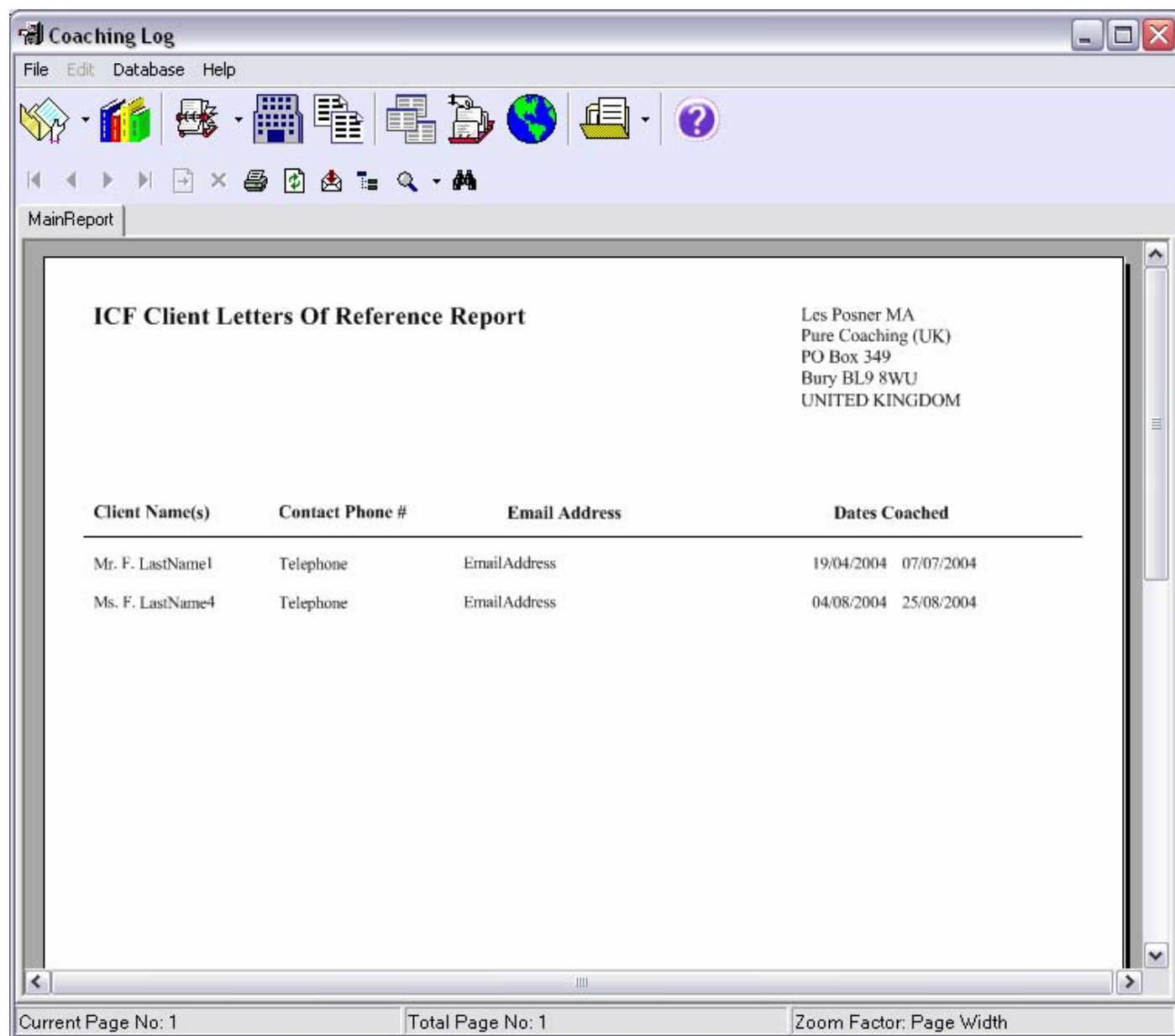
| Client Name(s)               | Start/End Date        | Hours       | Pro-Bono Hrs. | Contact Information: Phone/email |
|------------------------------|-----------------------|-------------|---------------|----------------------------------|
| Mr. F. LastName1             | 19/04/2004 07/07/2004 | 4.00        | 0.00          | Telephone      EmailAddress      |
| Ms. F. LastName4             | 04/08/2004 25/08/2004 | 3.00        | 0.00          | Telephone      EmailAddress      |
| <b>Total Hours Submitted</b> |                       | <b>7.00</b> | <b>0.00</b>   |                                  |

The status bar at the bottom shows 'Current Page No: 1', 'Total Page No: 1', and 'Zoom Factor: Page Width'.

## Letters of Reference

This report lists the names, contact information (Phone/email) and start and end dates of the sessions for the coachees you selected.

These details are sorted by date (ascending).



The screenshot shows the 'Coaching Log' application window. The title bar reads 'Coaching Log'. The menu bar includes 'File', 'Edit', 'Database', and 'Help'. The toolbar contains various icons for file operations, database management, and help. The 'MainReport' tab is selected. The report content is as follows:

**ICF Client Letters Of Reference Report**

Les Posner MA  
Pure Coaching (UK)  
PO Box 349  
Bury BL9 8WU  
UNITED KINGDOM

| Client Name(s)   | Contact Phone # | Email Address | Dates Coached         |
|------------------|-----------------|---------------|-----------------------|
| Mr. F. LastName1 | Telephone       | EmailAddress  | 19/04/2004 07/07/2004 |
| Ms. F. LastName4 | Telephone       | EmailAddress  | 04/08/2004 25/08/2004 |

At the bottom of the window, the status bar displays: 'Current Page No: 1', 'Total Page No: 1', and 'Zoom Factor: Page Width'.

# Invoices

You can generate Single invoices to send to your coachee's or you can generate Summary reports of the invoices you have raised By Coachee or for All Coachees.

**Note:** In the example of the Single invoice and Summary By Coachee, the coachee for whom the invoice/report will be generated is the coachee currently selected in the Coachee Sessions and Invoices panel.

In the example of the Summary reports, both reports can be limited to a date range or [left open](#) reporting all raised invoices.

**Coaching Log**

File Edit Database Help

**Coachee Sessions and In**

Name: Mr. FirstName1 LastName1

Telephone, Fax and e-mail: Tel: Telephone Fax: E-mail: EmailAddress

Other Info: Company: Department: Birthday:

**Sessions and Invoices**

Sessions Session Notes Invoices Invoice Notes

**Coachee Invoices**

|   | Ref. No. | # of Sessions | Type      | Currency | Amount | Tax % | Tax Incl.                           | Terms | Sent       | Received |
|---|----------|---------------|-----------|----------|--------|-------|-------------------------------------|-------|------------|----------|
| ▶ | Inv1     | 4             | Telephone | GBP      | 320.00 | 17.50 | <input type="checkbox"/>            | 10    | 14/05/2004 |          |
|   | Inv2     | 1             | Telephone | GBP      | 100.00 | 17.50 | <input checked="" type="checkbox"/> | 10    | 09/07/2004 |          |
|   | Inv4     | 1             | Telephone | GBP      | 100.00 | 17.50 | <input checked="" type="checkbox"/> | 10    | 18/08/2004 |          |
| * |          |               |           |          |        |       |                                     |       |            |          |

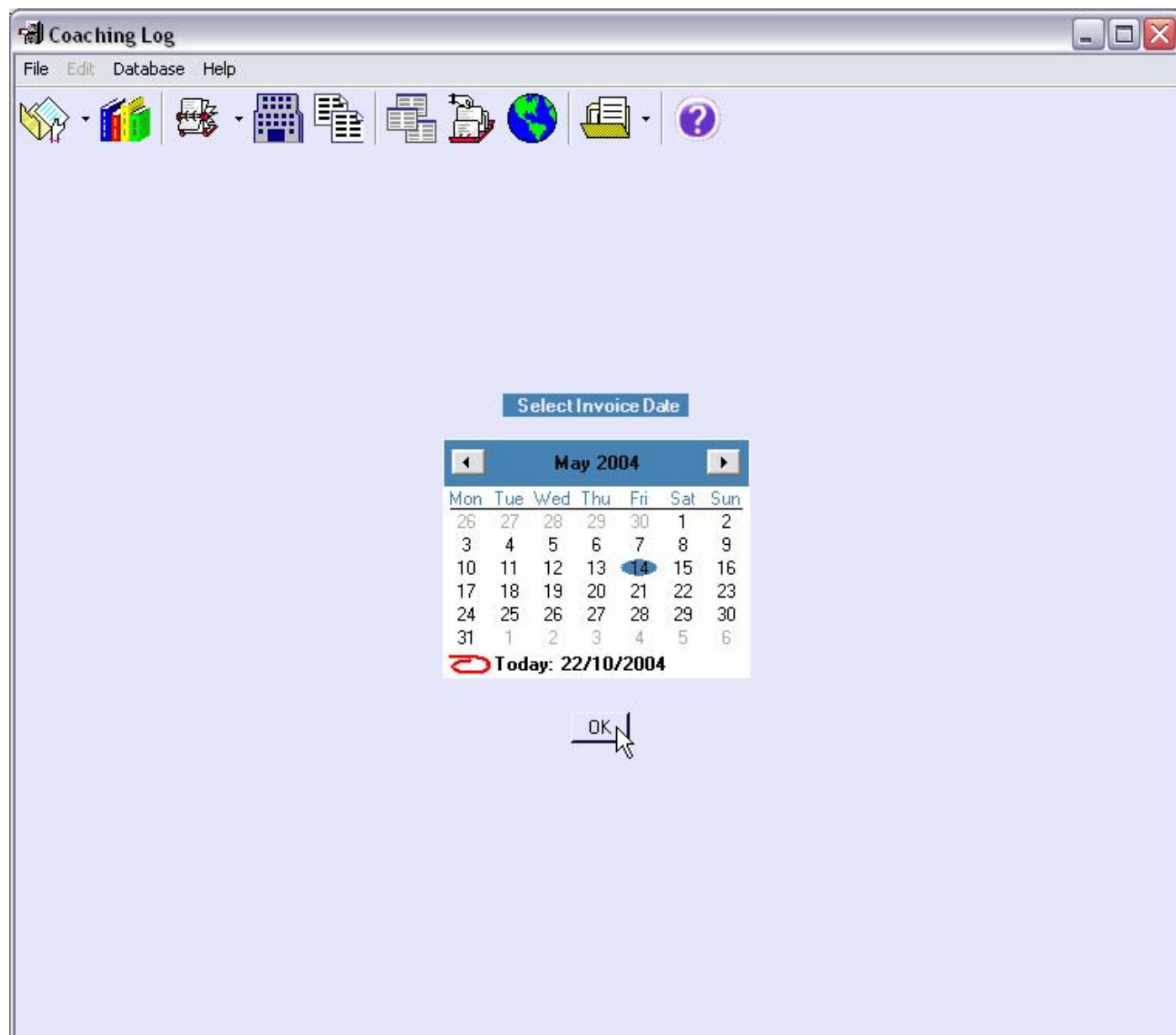
Navigation: < << > >> 1 of 2 >>>

## Single

When generating a single coachee invoice you will be requested to select the invoice date via this panel.

This date is the date corresponding to the date you entered in the Sent cell on the Coachee Sessions and Invoices panel Coachee Invoices data grid.

In this example, 14/5/2004 corresponding to the Sent date for Inv1 as shown above.



You set the date in the calendar by clicking on it and can scroll through the months by clicking the arrow buttons at the left and right sides of the calendar header. You can scroll quickly through years by clicking the buttons that appear when clicking on the year in the calendar header.



When you have selected the date **click OK**.

The invoice is generated.

The layout of the names and addresses in both the header and detail sections of the report are customisable via [Report Options](#). This will be covered separately later as will [Page Navigation](#), [Print](#), [Refresh](#), [Export](#), [Toggle Group Tree](#), [Zoom](#) and [Search Text](#).

The screenshot shows the 'Coaching Log' application window. The menu bar includes 'File', 'Edit', 'Database', and 'Help'. The toolbar contains various icons for file operations, navigation, and search. The 'MainReport' tab is active, displaying an invoice report. The report is titled 'Invoice' and includes the following details:

**Invoice**

Les Posner MA  
Pure Coaching (UK)  
PO Box 349  
Bury BL9 8WU  
UNITED KINGDOM

---

Mr. FirstName1 LastName1  
Address1  
Town  
City  
UNITED KINGDOM

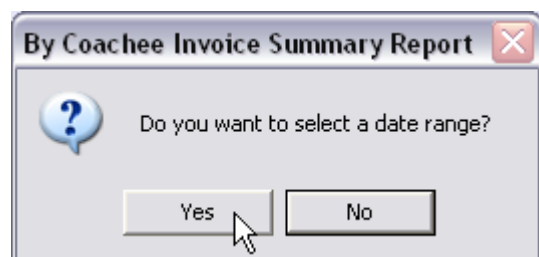
| Reference | Invoice Date | Session Detail | Currency | Fee    | Tax%  | Tax   | Incl? | Total  |
|-----------|--------------|----------------|----------|--------|-------|-------|-------|--------|
| Inv1      | 14/05/2004   | 4 Telephone    | GBP      | 320.00 | 17.50 | 56.00 | N     | 376.00 |

| Invoice Fees | Invoice Tax | Invoice Total |
|--------------|-------------|---------------|
| 320.00       | 56.00       | 376.00        |

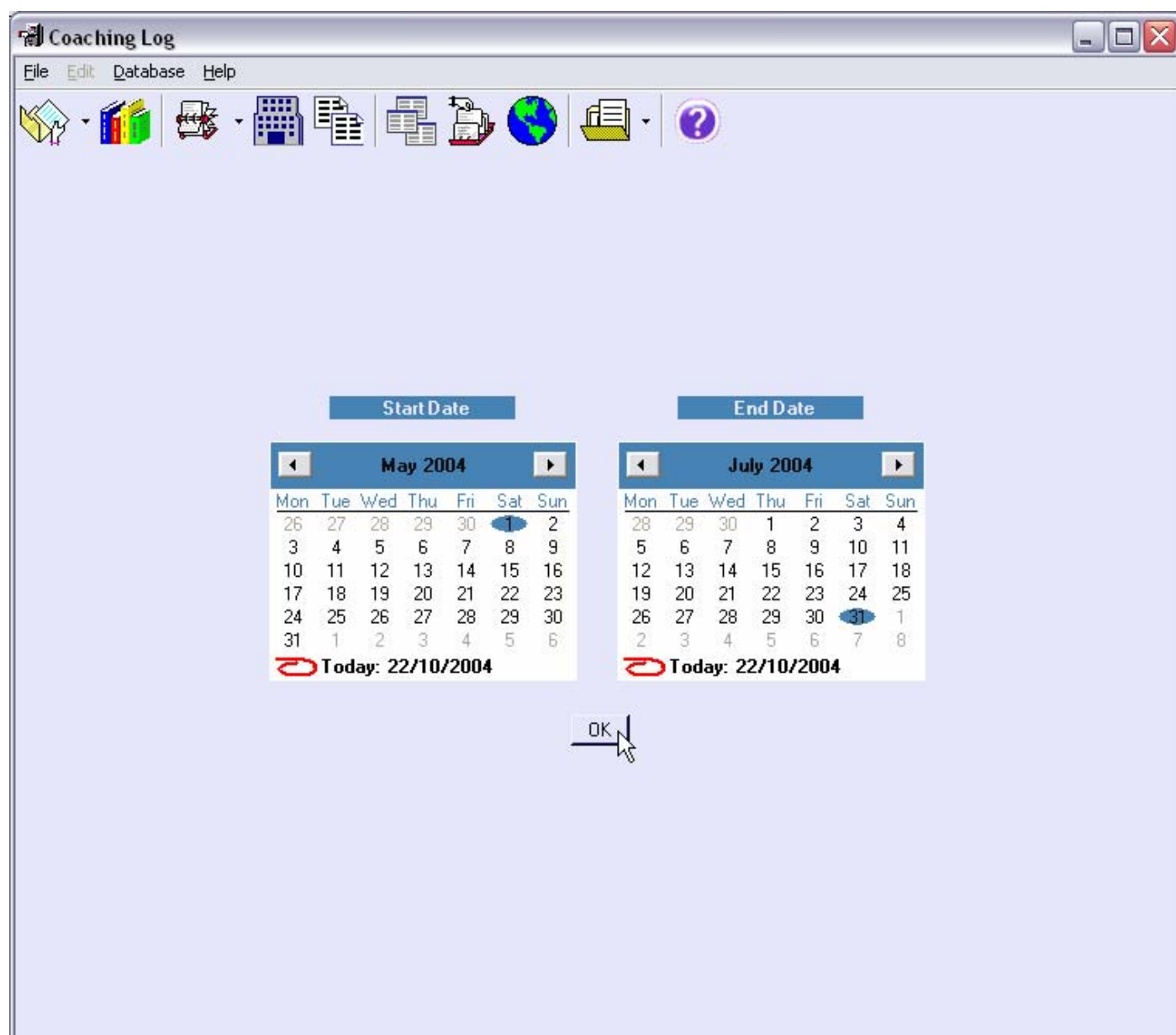
At the bottom of the window, the status bar displays: 'Current Page No: 1', 'Total Page No: 1', and 'Zoom Factor: Page Width'.

## Summary – By Coachee And All Coachees

When generating a summary of the invoices you have raised either By Coachee or All Coachees, in this example By Coachee, you will see this dialog box



Clicking Yes will display a panel with two calendars from which you select the start and end dates for the report, in this example 1/5/2004 to 31/7/2004.



You set the date in each calendar by clicking on it and can scroll through the months by clicking the arrow buttons at the left and right sides of the calendar header. You can scroll quickly through years by clicking the buttons that appear when clicking on the year in the calendar header.



When you have selected the dates **click OK**.

The summary invoice report is generated.

The layout of the names and addresses in both the header and detail sections of the report are customisable via [Report Options](#). This will be covered separately later as will [Page Navigation](#), [Print](#), [Refresh](#), [Export](#), [Toggle Group Tree](#), [Zoom](#) and [Search Text](#).

**Invoice Summary**

Les Posner MA  
Pure Coaching (UK)  
PO Box 349  
Bury BL9 8WU  
UNITED KINGDOM

---

Mr. FirstName1 LastName1  
Address1  
Town  
City  
UNITED KINGDOM

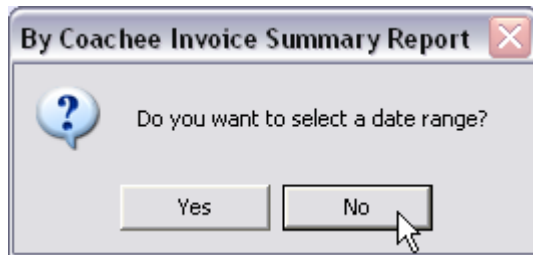
| Reference | Invoice Date | Session Detail | Currency | Fee    | Tax%  | Tax   | Incl? | Total  |
|-----------|--------------|----------------|----------|--------|-------|-------|-------|--------|
| Inv1      | 14/05/2004   | 4 Telephone    | GBP      | 320.00 | 17.50 | 56.00 | N     | 376.00 |
| Inv2      | 09/07/2004   | 1 Telephone    | GBP      | 100.00 | 17.50 | 17.50 | Y     | 100.00 |

| Invoice Fees | Invoice Tax | Invoice Total |
|--------------|-------------|---------------|
| 420.00       | 73.50       | 476.00        |

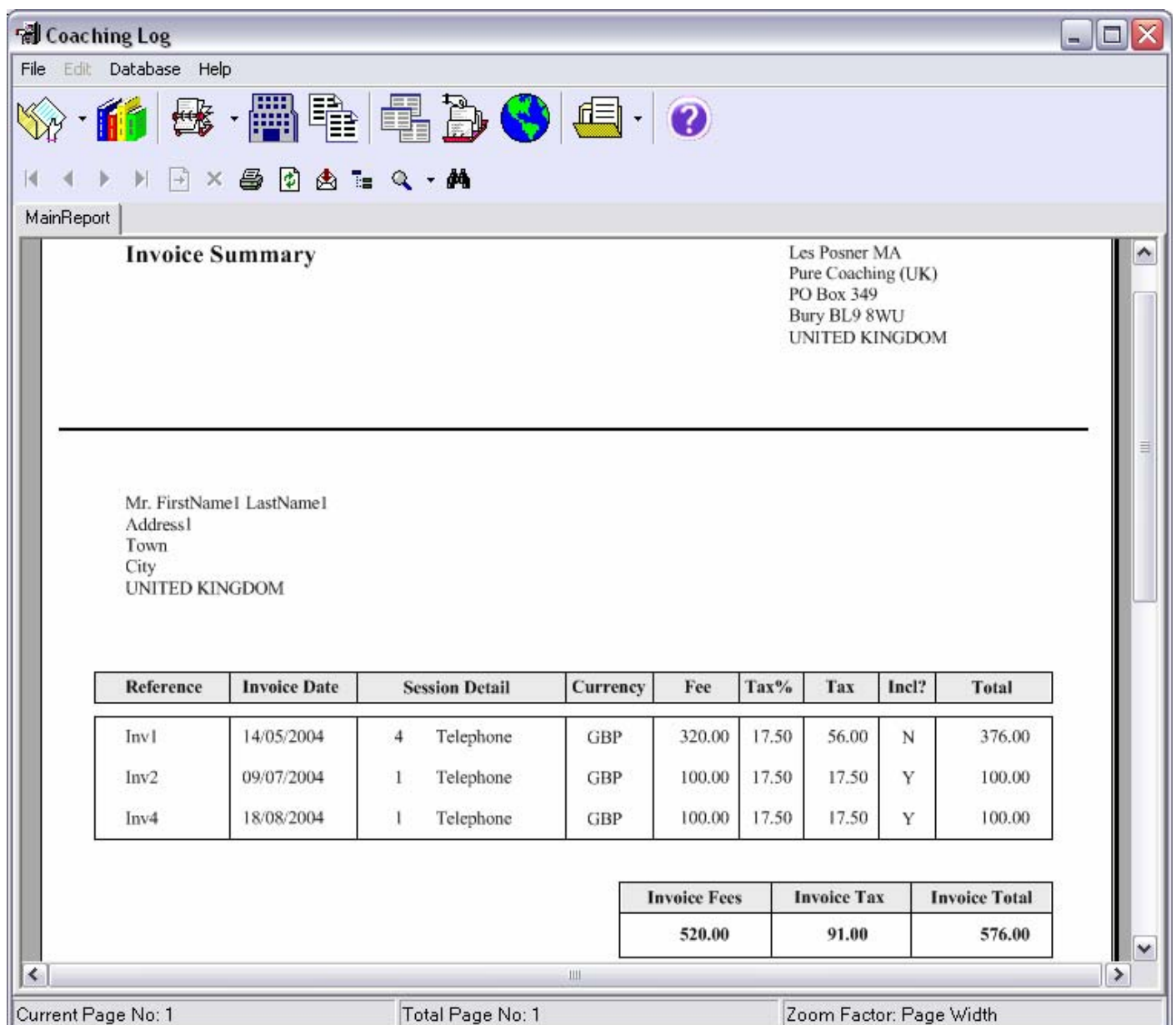
Current Page No: 1      Total Page No: 1      Zoom Factor: Page Width

## No Date Range

When generating a summary of the invoices you have raised for a coachee you will see this dialog box



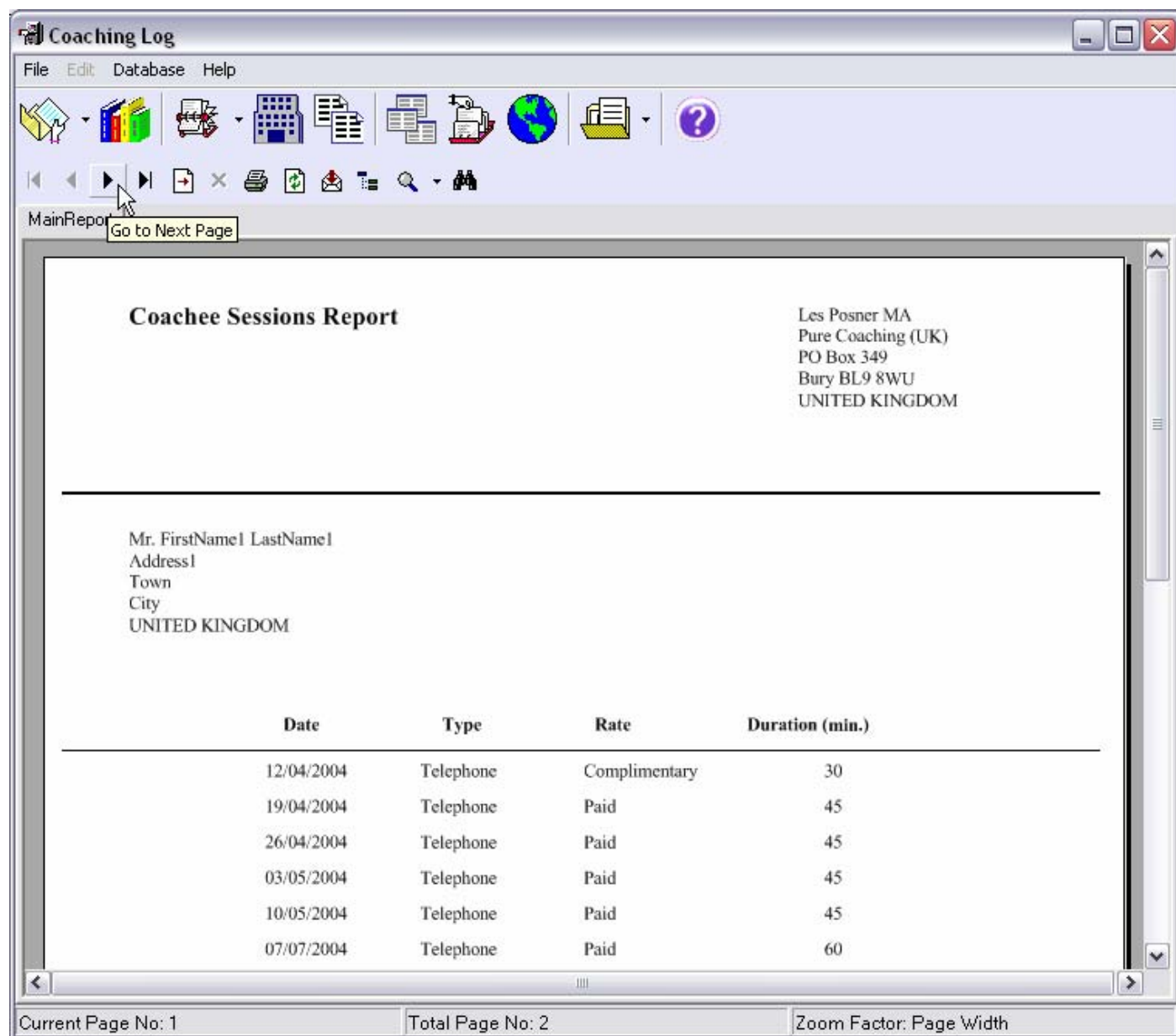
Clicking No will generate the report directly.



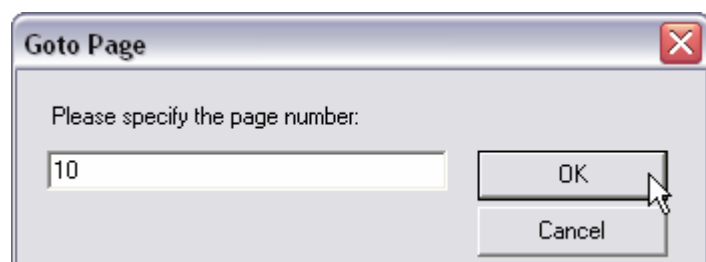
# Report Panel Buttons

## Page Navigation

In the case you generated a report with several pages, you can navigate through the pages by clicking the buttons at the top left of the report panel.



Clicking the Goto Page button  opens this dialog box

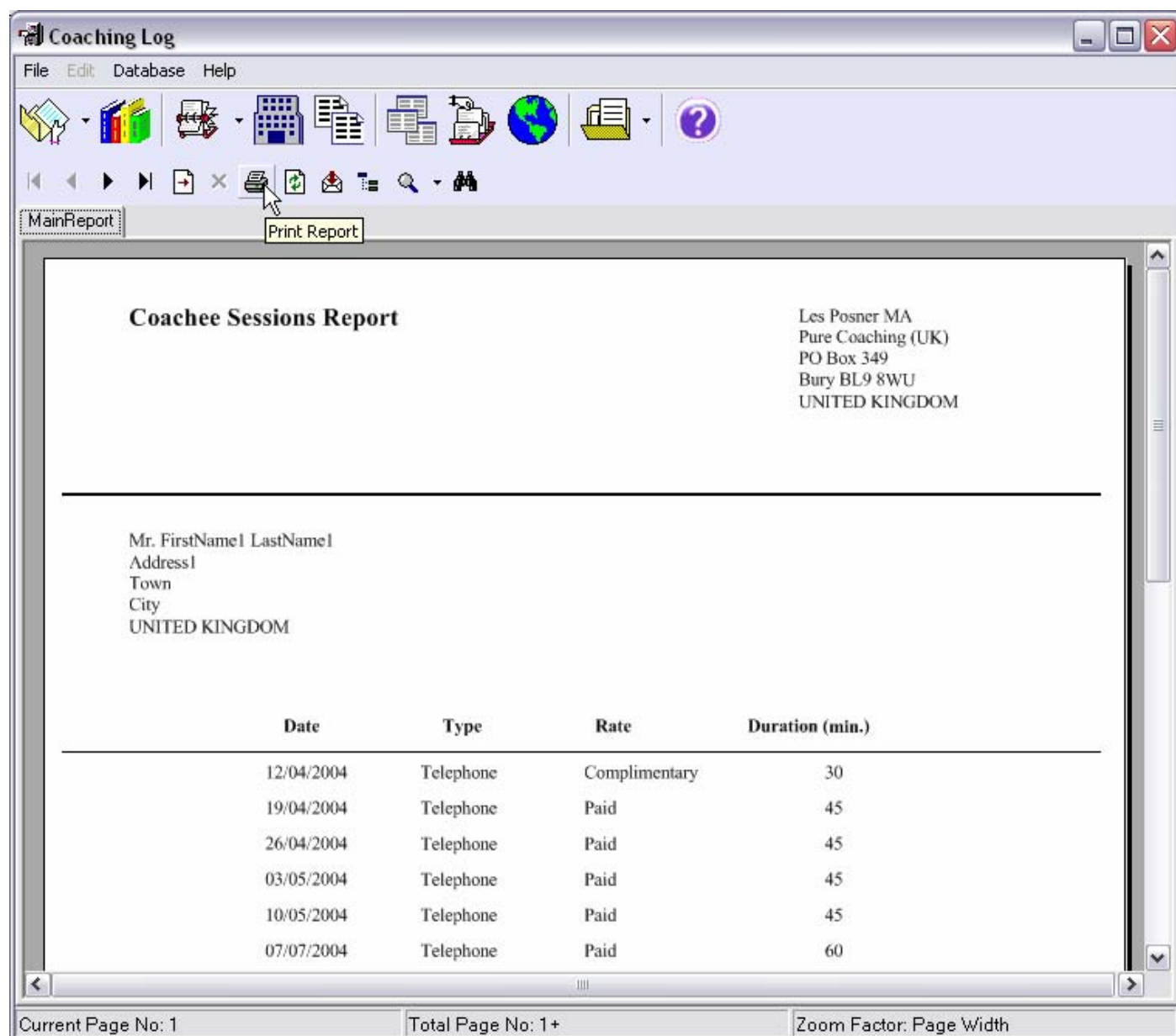


Enter the number of the page you want to navigate to and **click OK**.

## Print

You can print your report simply by clicking the Print button.

The report will be printed to the printer that is set as the default printer.



## Refresh

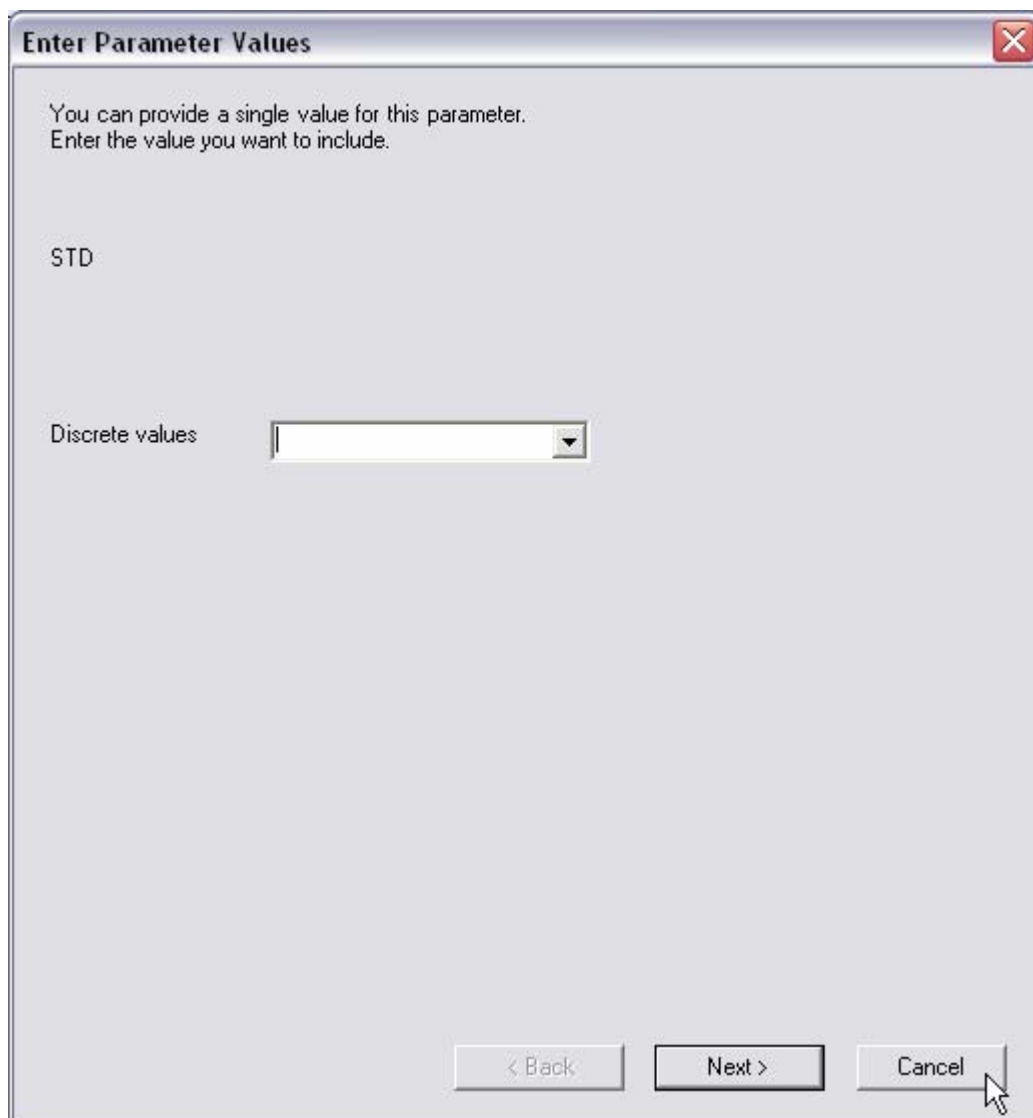
All reports are generated dynamically from data saved in the database.

If the data in a report is not what you require you can simply return to the relevant section, alter the data, save the record and regenerate the report.

Refresh is intended to be used to regenerate the report by refreshing it to reflect the new information in the database. However, as the reports in Coaching Log™ rely on various parameters for generation, refresh will ask the user to supply these parameters.

As these parameters are not something the user has knowledge of, it is recommended you do not use Refresh but regenerate the report from the reports menu.

In the case you do click the Refresh button you will see a dialog box similar to this.



The dialog box is titled "Enter Parameter Values" and has a red close button in the top right corner. Inside the dialog, there is instructional text: "You can provide a single value for this parameter. Enter the value you want to include." Below this text, the parameter "STD" is listed. Underneath "STD", there is a label "Discrete values" followed by a text input field with a dropdown arrow on the right. At the bottom of the dialog, there are three buttons: "< Back", "Next >", and "Cancel". A mouse cursor is pointing at the "Cancel" button.

If you see this dialog box **click Cancel**.

You will return to the report panel but the report will now be blank.

Regenerate the report from the Reports menu.

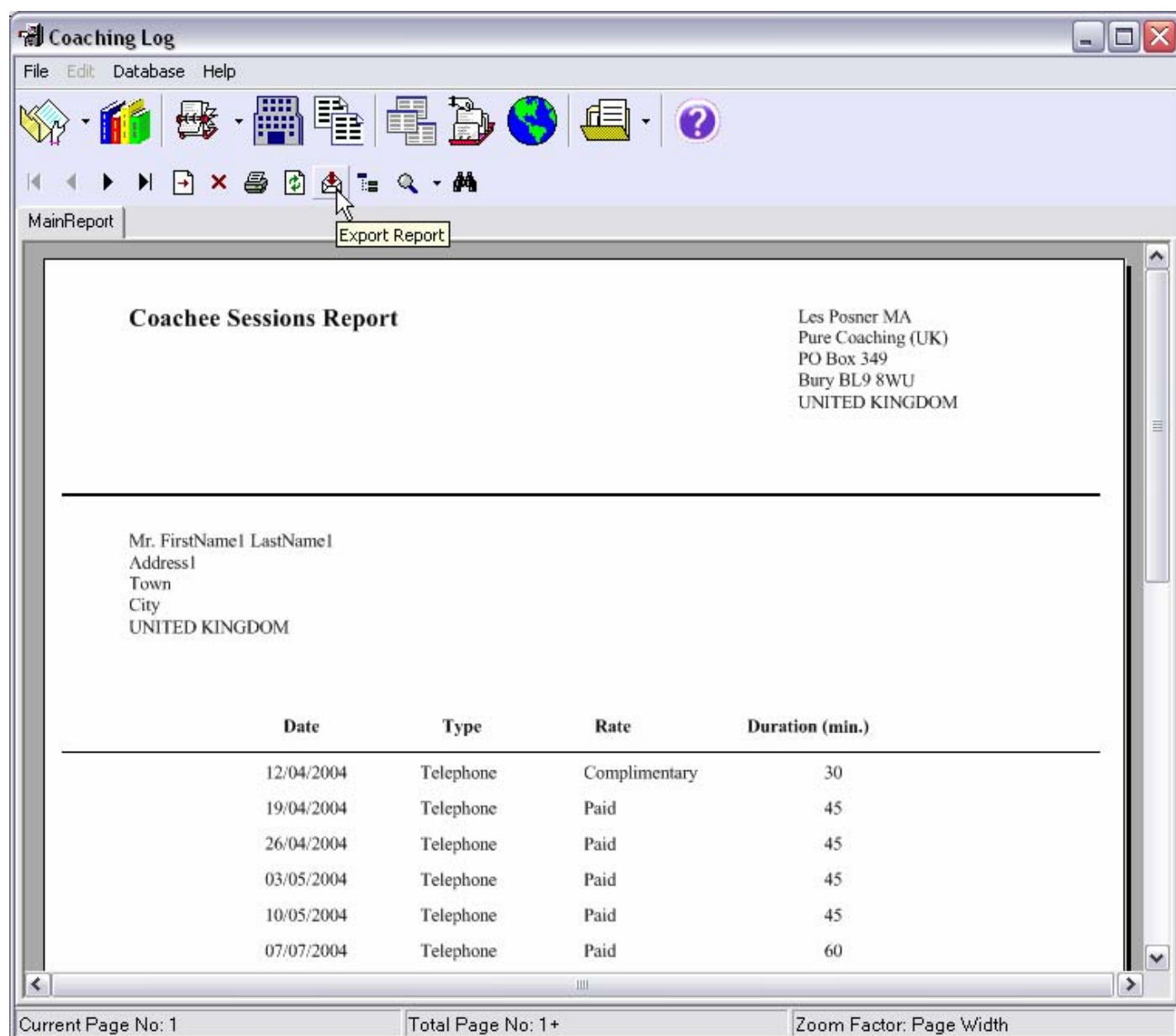
## Export

Reports can be exported as documents of various formats:

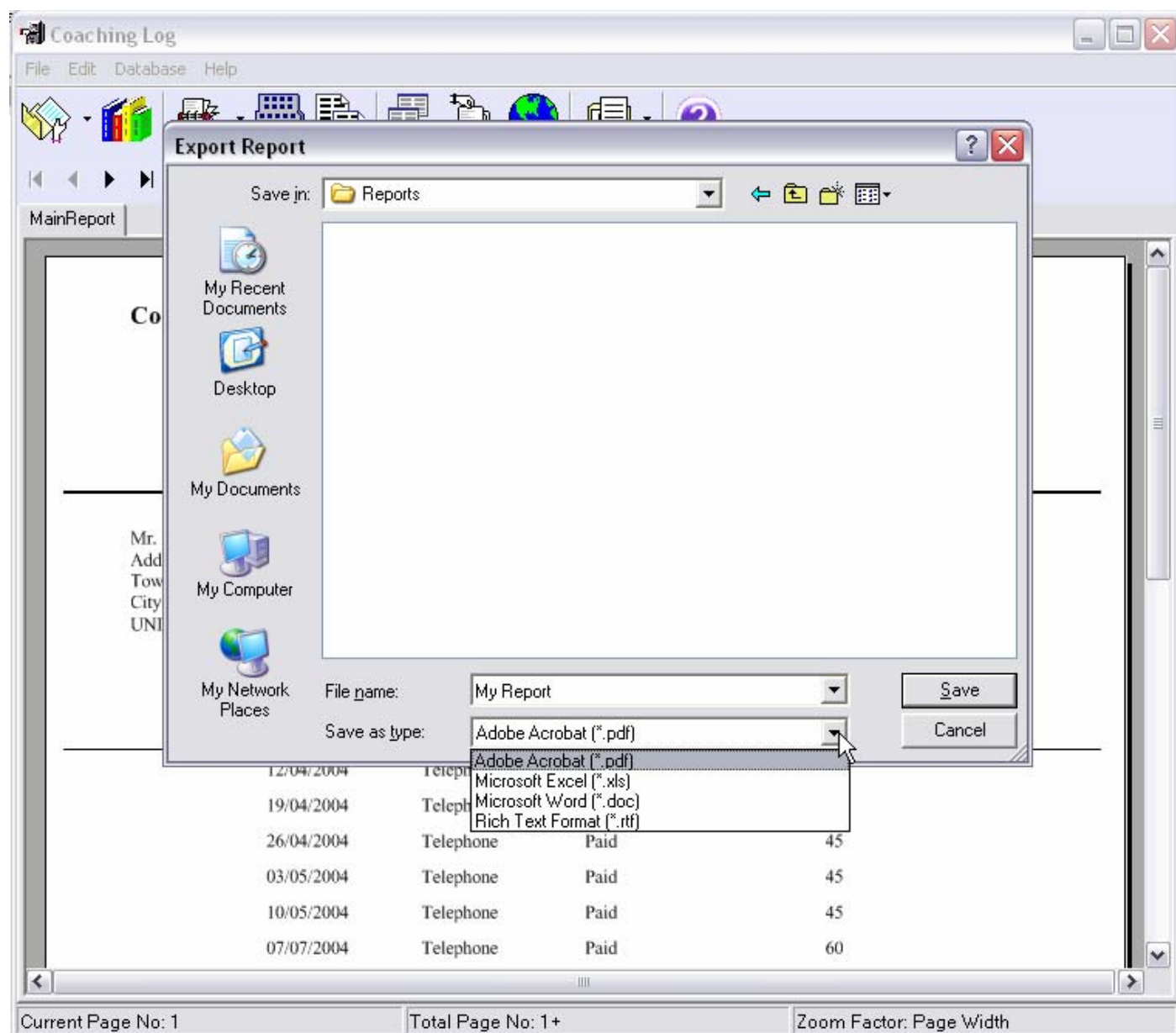
- ❖ Adobe Acrobat (\*.pdf)
- ❖ Microsoft Excel (\*.xls)
- ❖ Microsoft Word (\*.doc)
- ❖ Rich Text Format (\*.rtf)

in order they can be utilised by other applications, for example incorporating into a larger Word document or e-mailing as an attachment.

To export a report click the Export Report button.



You will then see this dialog box.



1. Navigate to the folder to which you wish to export the report via the Save In window.
2. Enter the name you wish to give the report in the File Name window.
3. Select the type of file you wish the report to be exported as from the drop down list in the Save as type window (Adobe Acrobat (\*.pdf) is the default selection) and **click Save**.

When the export has been completed you will see this dialog box.



**Click OK.**

## Toggle Group Tree

When working with reports that have multiple pages, clicking this button opens a panel to the left of the main panel that contains a tree structure of all the report group headers.

You can navigate through the report by clicking on the various group headers in this panel in the same way as you would navigate through a PDF document via the bookmarks.

When clicking a header in the group tree panel, the relevant page is displayed in the main panel and the selected group header is highlighted with a red box.

The screenshot shows the 'Coaching Log' application window. On the left, the 'Toggle Group Tree' panel is open, displaying a tree structure with 'LastName1' and 'LastName4'. The 'MainReport' tab is selected, showing the 'Coachee Sessions Report'. The report includes contact information for Les Posner MA, a table of sessions, and summary totals. The 'Toggle Group Tree' button in the toolbar is highlighted with a red box.

**Coachee Sessions Report**

Les Posner MA  
Pure Coaching (UK)  
PO Box 349  
Bury BL9 8WU  
UNITED KINGDOM

---

Ms. FirstName4 LastName4  
Adress1  
Town  
City  
SWITZERLAND

| Date       | Type      | Rate | Duration (min.) |
|------------|-----------|------|-----------------|
| 04/08/2004 | Telephone | Paid | 45              |
| 11/08/2004 | Telephone | Paid | 45              |
| 18/08/2004 | Telephone | Paid | 45              |
| 25/08/2004 | Telephone | Paid | 45              |

---

Total (hrs.) 3.00

Grand Total (hrs.) 8.50

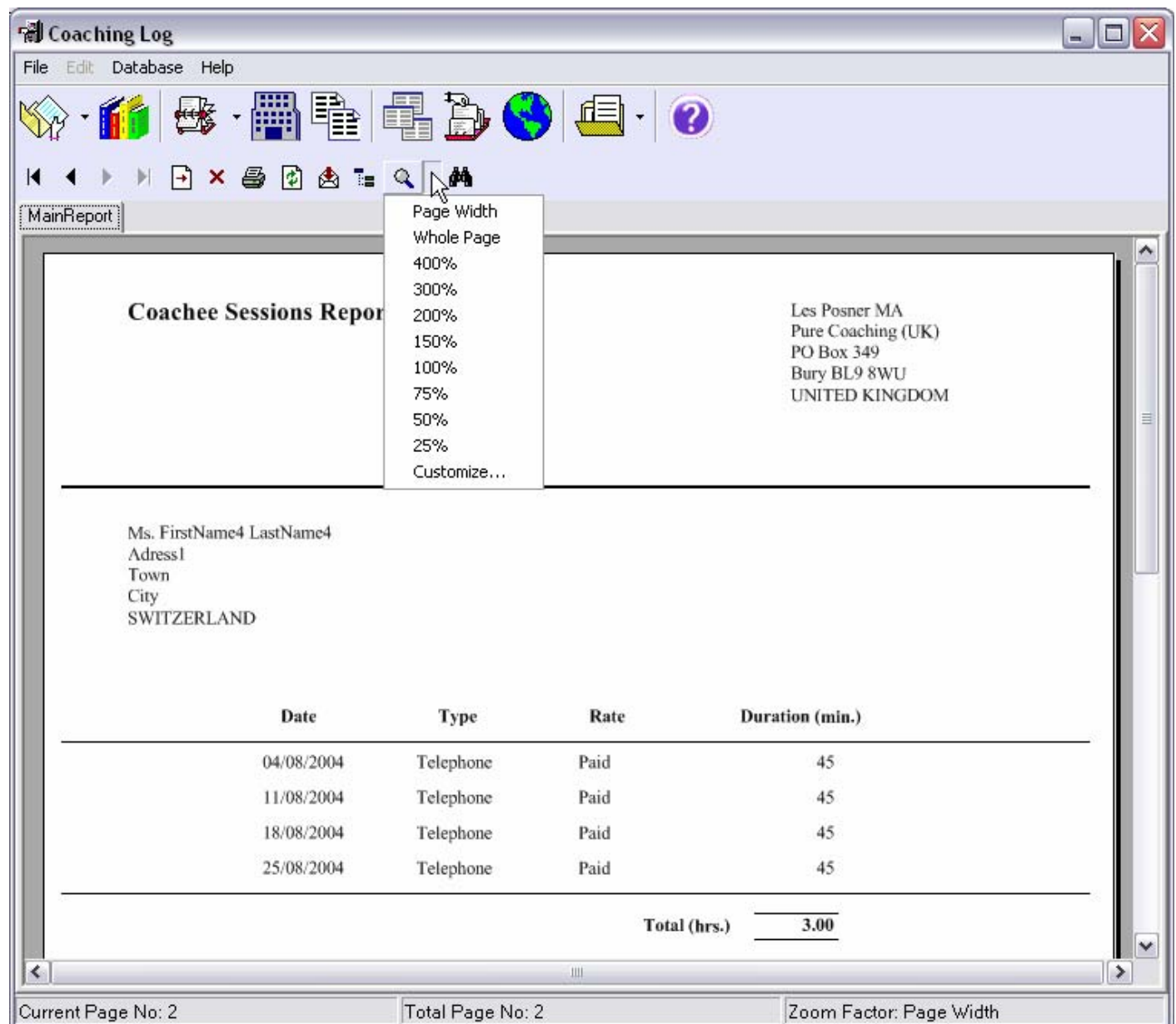
Current Page No: 2      Total Page No: 2      Zoom Factor: Page Width

## Zoom

The default zoom of the reports is Page Width.

Other zoom settings can be selected from the drop down list displayed when clicking the down arrow to the right of the main Zoom button.

The zoom setting will return to default on regeneration of the report or generation of a different report.



The screenshot shows the 'Coaching Log' application window. The menu bar includes 'File', 'Edit', 'Database', and 'Help'. The toolbar contains various icons for file operations and navigation. A dropdown menu is open over the zoom controls, listing the following options: 'Page Width', 'Whole Page', '400%', '300%', '200%', '150%', '100%', '75%', '50%', '25%', and 'Customize...'. The main report area is titled 'Coachee Sessions Report' and displays the following information:

Coachee Details:  
Ms. FirstName4 LastName4  
Adress1  
Town  
City  
SWITZERLAND

Coach Address:  
Les Posner MA  
Pure Coaching (UK)  
PO Box 349  
Bury BL9 8WU  
UNITED KINGDOM

| Date       | Type      | Rate | Duration (min.) |
|------------|-----------|------|-----------------|
| 04/08/2004 | Telephone | Paid | 45              |
| 11/08/2004 | Telephone | Paid | 45              |
| 18/08/2004 | Telephone | Paid | 45              |
| 25/08/2004 | Telephone | Paid | 45              |

Total (hrs.) 3.00

At the bottom of the window, the status bar shows: 'Current Page No: 2', 'Total Page No: 2', and 'Zoom Factor: Page Width'.

## Search Text

This feature, as the name suggests, allows you to search the report for specific text.

The screenshot shows the 'Coaching Log' application window. The menu bar includes 'File', 'Edit', 'Database', and 'Help'. The toolbar contains various icons for file operations, a search icon (magnifying glass), and a 'Search Text' button (represented by a magnifying glass over a document). A tooltip labeled 'Search Text' is visible over the search icon. The main report area is titled 'Coachee Sessions Report' and displays the following information:

Coachee Sessions Report

Les Posner MA  
Pure Coaching (UK)  
PO Box 349  
Bury BL9 8WU  
UNITED KINGDOM

---

Ms. FirstName4 LastName4  
Adress1  
Town  
City  
SWITZERLAND

| Date       | Type      | Rate | Duration (min.) |
|------------|-----------|------|-----------------|
| 04/08/2004 | Telephone | Paid | 45              |
| 11/08/2004 | Telephone | Paid | 45              |
| 18/08/2004 | Telephone | Paid | 45              |
| 25/08/2004 | Telephone | Paid | 45              |

---

Total (hrs.) 3.00

At the bottom of the window, the status bar shows: Current Page No: 2, Total Page No: 2, and Zoom Factor: Page Width.

Clicking the Search Text button displays the Search Text dialog box.

Enter the text you wish to search for and click Find Next.

If the text you specified is found in the report it is highlighted with a red box.

Clicking Find Next again will find the next occurrence of the specified text in the report.

The screenshot shows the 'Coaching Log' application window. The title bar reads 'Coaching Log'. The menu bar includes 'File', 'Edit', 'Database', and 'Help'. The toolbar contains various icons for file operations, editing, and searching. The 'MainReport' tab is selected. The report is titled 'Coachee Sessions Report' and is for 'Les Posner MA', 'Pure Coaching (UK)', 'PO Box 349', 'Bury BL9 8WU', 'UNITED KINGDOM'. A 'Search Text' dialog box is open, showing 'Find what:' with the text 'Telephone' entered. The 'Find Next' button is highlighted. The report table has columns: Date, Type, Rate, and Duration (min.). The first row of data has 'Telephone' highlighted with a red box. The total duration is 3.00 hours.

**Coachee Sessions Report**

Les Posner MA  
Pure Coaching (UK)  
PO Box 349  
Bury BL9 8WU  
UNITED KINGDOM

Ms. FirstName4 LastName  
Adress1  
Town  
City  
SWITZERLAND

**Search Text**

Find what:  
Telephone

Find Next  
Cancel

| Date         | Type      | Rate | Duration (min.) |
|--------------|-----------|------|-----------------|
| 04/08/2004   | Telephone | Paid | 45              |
| 11/08/2004   | Telephone | Paid | 45              |
| 18/08/2004   | Telephone | Paid | 45              |
| 25/08/2004   | Telephone | Paid | 45              |
| Total (hrs.) |           |      | 3.00            |

Current Page No: 2      Total Page No: 2      Zoom Factor: Page Width

## Report Options

The format of the names and addresses in both the report header and detail sections can be customised via the report options.

These options are set or un-set by checking and un-checking the relevant checkboxes.

**Note:** When you change an option setting it will take effect the next time you generate a report.

All option settings are saved so, once set, they stay set until you change them.

Each option is described individually below.

### Title on Report

This option controls whether the title appears before the name either in the header or in the detail section.

In this example the title appears in the detail section but not the header.

The screenshot shows the 'Coaching Log' application window. The 'Options' menu is open, and the 'Title on Report' option is selected, showing a sub-menu where 'Detail' is checked. The main report area displays an 'Invoice Summary' for 'Mr. FirstName1 LastName1' with address details. Below this is a table of invoice items and a summary table at the bottom right.

| Reference | Invoice Date | Session Detail | Currency | Fee    | Tax%  | Tax   | Incl? | Total  |
|-----------|--------------|----------------|----------|--------|-------|-------|-------|--------|
| Inv1      | 14/05/2004   | 4 Telephone    | GBP      | 320.00 | 17.50 | 56.00 | N     | 376.00 |
| Inv2      | 09/07/2004   | 1 Telephone    | GBP      | 100.00 | 17.50 | 17.50 | Y     | 100.00 |
| Inv4      | 18/08/2004   | 1 Telephone    | GBP      | 100.00 | 17.50 | 17.50 | Y     | 100.00 |

| Invoice Fees | Invoice Tax | Invoice Total |
|--------------|-------------|---------------|
| 520.00       | 140.40      | 576.00        |

Current Page No: 1      Total Page No: 1+      Zoom Factor: Page Width

## Address on Report

Whether the address appears in the header or detail section of the report is controlled in the same way as is the title. In this example it appears in both.

The screenshot shows the 'Coaching Log' application window. The 'MainReport' tab is active, displaying an 'Invoice Summary'. The 'Options' menu is open, showing the 'Address on Report' option selected. The 'Address on Report' submenu is also open, showing the 'Header' and 'Detail' options checked. The 'Client Ref. only' option is also visible. The main report area shows the client's address: Mr. FirstName1 LastName1, Address1, Town, City, UNITED KINGDOM. Below the address is a table of invoices with columns: Reference, Invoice Date, Session Detail, Currency, Fee, Tax%, Tax, Incl?, and Total. The table contains three rows of invoice data. At the bottom right of the report area is a summary table with columns: Invoice Fees, Invoice Tax, and Invoice Total. The status bar at the bottom shows 'Current Page No: 1', 'Total Page No: 1+', and 'Zoom Factor: Page Width'.

**Options Menu:**

- Sessions
- Training
- ICF
- Invoices
- Options
  - Title on Report
  - Address on Report
    - ☒ Header
    - ☒ Detail
    - Client Ref. only
  - Zip before City
  - Country on Report
  - ☒ My name on Report

**Invoice Summary**

Mr. FirstName1 LastName1  
Address1  
Town  
City  
UNITED KINGDOM

| Reference | Invoice Date | Session Detail | Currency | Fee    | Tax%  | Tax   | Incl? | Total  |
|-----------|--------------|----------------|----------|--------|-------|-------|-------|--------|
| Inv1      | 14/05/2004   | 4 Telephone    | GBP      | 320.00 | 17.50 | 56.00 | N     | 376.00 |
| Inv2      | 09/07/2004   | 1 Telephone    | GBP      | 100.00 | 17.50 | 17.50 | Y     | 100.00 |
| Inv4      | 18/08/2004   | 1 Telephone    | GBP      | 100.00 | 17.50 | 17.50 | Y     | 100.00 |

| Invoice Fees | Invoice Tax | Invoice Total |
|--------------|-------------|---------------|
| 520.00       | 140.40      | 576.00        |

Current Page No: 1      Total Page No: 1+      Zoom Factor: Page Width

## Address on Report – Client Ref. only (Confidentiality)

Selecting the option Client Ref. only replaces the name and address in the detail section with the client reference you entered in the [People](#) panel for confidentiality on printed reports.

The screenshot shows the 'Coaching Log' application window. The main report area is titled 'Coachee Sessions Report' and displays a client ID '040015'. Below this is a table of sessions. The 'Options' menu is open, showing settings for the report. The 'Address on Report' option is selected, and its sub-menu is also open, showing 'Header' and 'Client Ref. only' options, both of which are checked. The 'My name on Report' option is also checked.

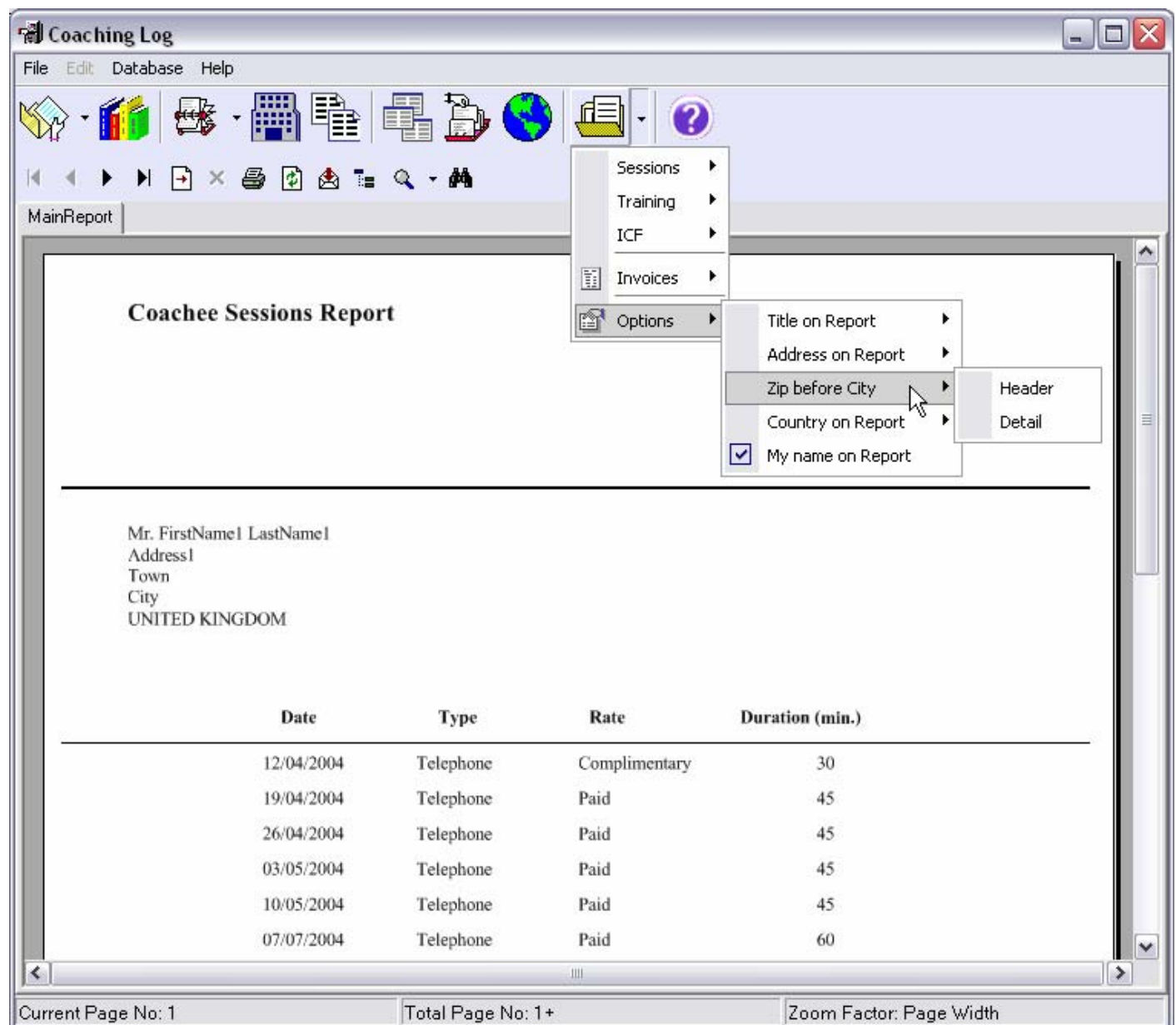
| Date       | Type      | Rate          | Duration (min.) |
|------------|-----------|---------------|-----------------|
| 12/04/2004 | Telephone | Complimentary | 30              |
| 19/04/2004 | Telephone | Paid          | 45              |
| 26/04/2004 | Telephone | Paid          | 45              |
| 03/05/2004 | Telephone | Paid          | 45              |
| 10/05/2004 | Telephone | Paid          | 45              |
| 07/07/2004 | Telephone | Paid          | 60              |

Current Page No: 1      Total Page No: 1+      Zoom Factor: Page Width

## Zip before City

This controls whether the postal (ZIP) code appears before or after the city in the addresses either in the header or detail sections.

This allows you to correctly display/print addresses where the postal (ZIP) code appears after the city, e.g. UK or before the city e.g. Switzerland.



## Country on Report

This option controls whether the country appears in the addresses in either the header or detail section of the report.

In this example it appears in both.

The screenshot shows the 'Coaching Log' application window. The menu bar includes 'File', 'Edit', 'Database', and 'Help'. The toolbar contains various icons for file operations and navigation. The 'MainReport' tab is active. The report title is 'Coachee Sessions Report'. A menu is open over the 'Options' button, showing a list of report options. The 'Country on Report' option is highlighted, and its sub-menu is open, showing checkboxes for 'Header' and 'Detail', both of which are checked. The report content includes a header section with client information and a table of sessions.

Mr. FirstName1 LastName1  
Address1  
Town  
City  
UNITED KINGDOM

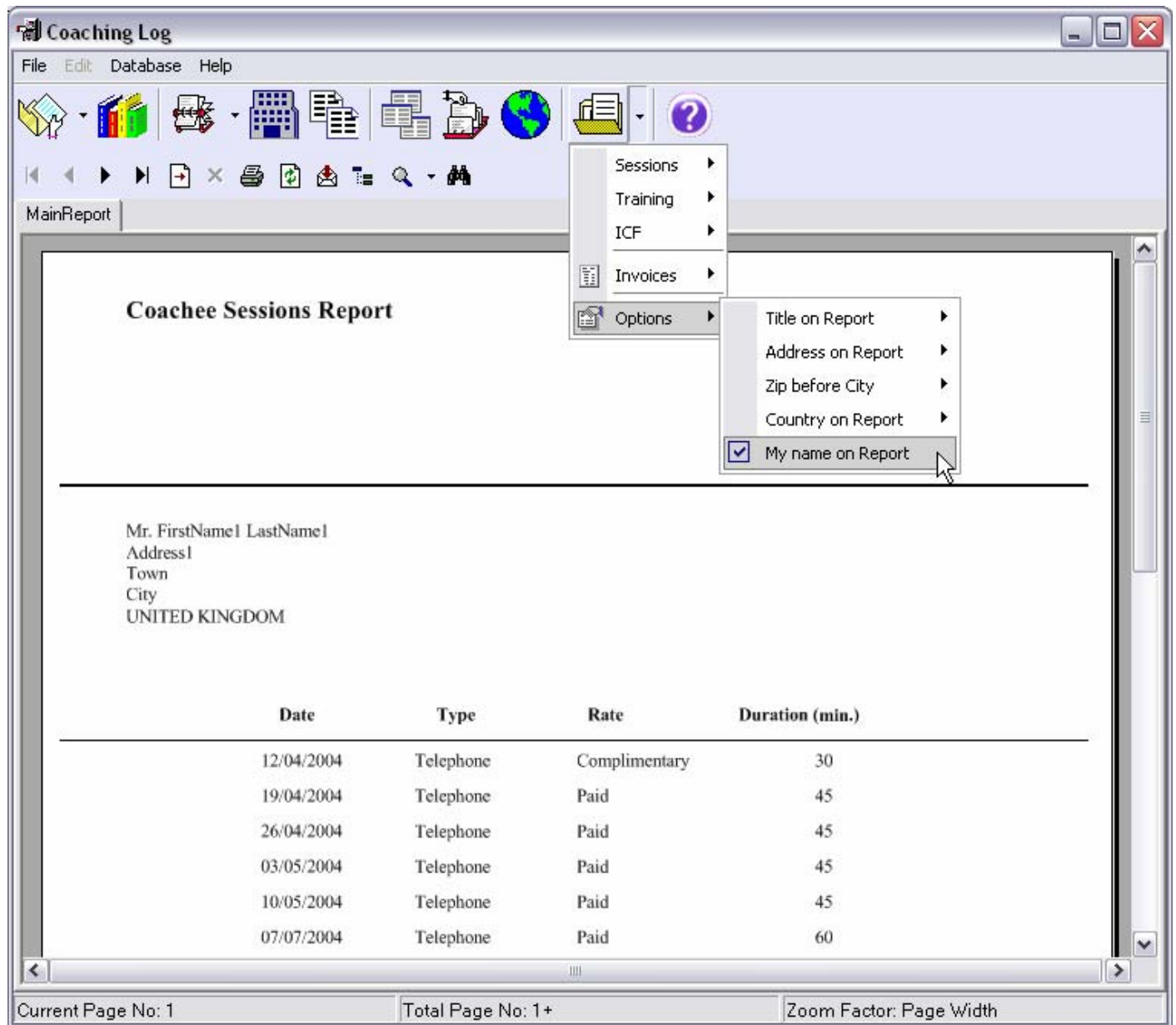
| Date       | Type      | Rate          | Duration (min.) |
|------------|-----------|---------------|-----------------|
| 12/04/2004 | Telephone | Complimentary | 30              |
| 19/04/2004 | Telephone | Paid          | 45              |
| 26/04/2004 | Telephone | Paid          | 45              |
| 03/05/2004 | Telephone | Paid          | 45              |
| 10/05/2004 | Telephone | Paid          | 45              |
| 07/07/2004 | Telephone | Paid          | 60              |

Current Page No: 1      Total Page No: 1+      Zoom Factor: Page Width

## My Name on Report

This controls whether your name appears above your address in the header section of the report.

In this example it does.



The screenshot shows the 'Coaching Log' application window. The menu bar includes 'File', 'Edit', 'Database', and 'Help'. The toolbar contains various icons for file operations and navigation. The 'MainReport' tab is active. The 'Options' menu is open, showing a list of settings: 'Sessions', 'Training', 'ICF', 'Invoices', and 'Options'. The 'Options' submenu is also open, showing 'Title on Report', 'Address on Report', 'Zip before City', 'Country on Report', and 'My name on Report' (which is checked). The report title is 'Coachee Sessions Report'. The header section displays the coachee's details: 'Mr. FirstName1 LastName1', 'Address1', 'Town', 'City', and 'UNITED KINGDOM'. Below the header is a table with the following data:

| Date       | Type      | Rate          | Duration (min.) |
|------------|-----------|---------------|-----------------|
| 12/04/2004 | Telephone | Complimentary | 30              |
| 19/04/2004 | Telephone | Paid          | 45              |
| 26/04/2004 | Telephone | Paid          | 45              |
| 03/05/2004 | Telephone | Paid          | 45              |
| 10/05/2004 | Telephone | Paid          | 45              |
| 07/07/2004 | Telephone | Paid          | 60              |

The status bar at the bottom shows 'Current Page No: 1', 'Total Page No: 1+', and 'Zoom Factor: Page Width'.