



Getting Started with Jigsaw: How to Run Your Coaching Program with Ease

Learn more about Jigsaw at <http://toolstouse.com/jigsawbox>

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Introduction

Jigsaw Box is an online coaching tool designed to help coaches deliver training material all under one roof in a quick and convenient format.

What is Jigsaw Box?



➔ See it in action at <http://toolstouse.com/jigsawbox>

The Jigsaw Box toolbox is very flexible, customizable, easy to use, and interactive. It gives the user the ability to create, edit, and upload information, audio, and video material simply and easily.











































You will also be able to track your service, your clients, your sales, as well, there is a questions and answers section within each module.

The following is a step by step how-to guide for setup and use of your Jigsaw box toolbox.

STEP 1. Create or Edit a Module

Log into your Jigsaw Box account and click on the **My Module Tab**.

On the module screen that opens you will see a number of draft modules already loaded. These training modules have been designed for you to use, or sell to your clients as is.

Draft Modules			Create Module	Re-Order Modules	?
Title	Version	Actions			
Overview	1	  			
Action Plans	1	  			
About You	1	  			
About Your Business	1	  			
About Your Coaching	1	  			
Where Are You Now?	1	  			
Quick Business Review	1	  			
Vision and Brand	1	  			
Finances	1	  			
Business Planning	1	  			
Key Performance Indicator	1	  			
Keep Your Clients	1	  			
Marketing	1	  			
Sales	1	  			

To the right of each module name are actions that can be taken. These actions are **‘EDIT’**, **‘DELETE’**, **‘MAKE LIVE’**.

If you choose to use a module as is then you can ***make it live*** by clicking on the **‘MAKE LIVE’** button.

To ***change*** a draft module, click on the **‘EDIT’** button.

EDIT allows you to change the title of the module, add a description and add your own content.

Adding Text

You will be able to paste previously written sections of a document, report, article, graph, worksheet etc., to your content area without having to rewrite.

To import some previous text from, for example Microsoft Word, use the ***Paste from Word*** Button in the format menu. This way the format is retained when you paste the text into the content area of the module.

My Clients
My Packages
My Modules
My Forums
My Reports

My Modules > Editing "Quick Business Review" Module

Editing "Quick Business Review" Module

Module Details

? Autosaved at: 07/05/2013 05:02:32

Title:
Maximum 150 characters
Quick Business Review

Description:

Here is how the most respected organization in the virtual assistance sector - the International Virtual Assistants Association - defines the term virtual assistance:

"A Virtual Assistant (VA) is an independent entrepreneur providing administrative, creative and/or technical services. Utilizing advanced technological modes of communication and data delivery, a professional VA assists clients in his/her area of

Version
Description:

If the text to be added is from a program other than Word then you will have to first copy and paste your text to some other software program such as, **Note Pad** or **Word Pad** and then use the **Paste from Word** button. Or just copy and paste to the content area of the module.

You will have to reformat the text once it is pasted to this area.

From the format toolbar menu within the content area of the module you will be able to make changes to the newly pasted text. You will be able to adjust, font type and size, background color, text style, indent, bold, add bullets, plus all other regular formatting features.

In this content area you will also be able to add links, images, audio and/or video files from your own website or from the web.

Adding Images

To add an image already on your own website or a link to an image somewhere else on the web simply click the image button on the formatting toolbar.

An **Image Properties** screen will open up. The first option for adding an image that will come up is to add an image using a URL. Type, or copy and paste the URL for the location of the image name into the blank box below the name URL. Enter any adjustments for the image for height, size, space, borders or alignment if any and then click OK.

Wait a few moments and the image will populate.

If you wish to upload an image then click the upload button on the ***Image Properties*** screen. Another sub menu screen will now open up.

You will see a blank box named ***Send it to the Server***.

Click the browse button to the right of this blank box. Files from your computer will come into view; select the image you want from your files. The image location will then populate in the ***Send it to the Server*** menu area.

Click the ***Send it to Server*** button, wait a couple of seconds and an image upload button will appear. Click OK. The ***Image Properties*** screen will re-open with a preview of the uploaded image.

Here you will be able to edit your image for width, height, size, border, and alignment; left or right.

If you are satisfied with the look of your image, **click OK**. Your image will now load into the content area of the module.

If you still think you need changes to the image size you can make that adjustment directly in the module.

If you wish to change the alignment of the image from right to left or, left to right, **click** on the image button on the format toolbar and the ***Image Properties*** menu screen will re-open.

Scroll down to the alignment tab and select the alignment change that you wish to make, **Click OK**. The alignment change will now be shown in your module.

The next area is linking.

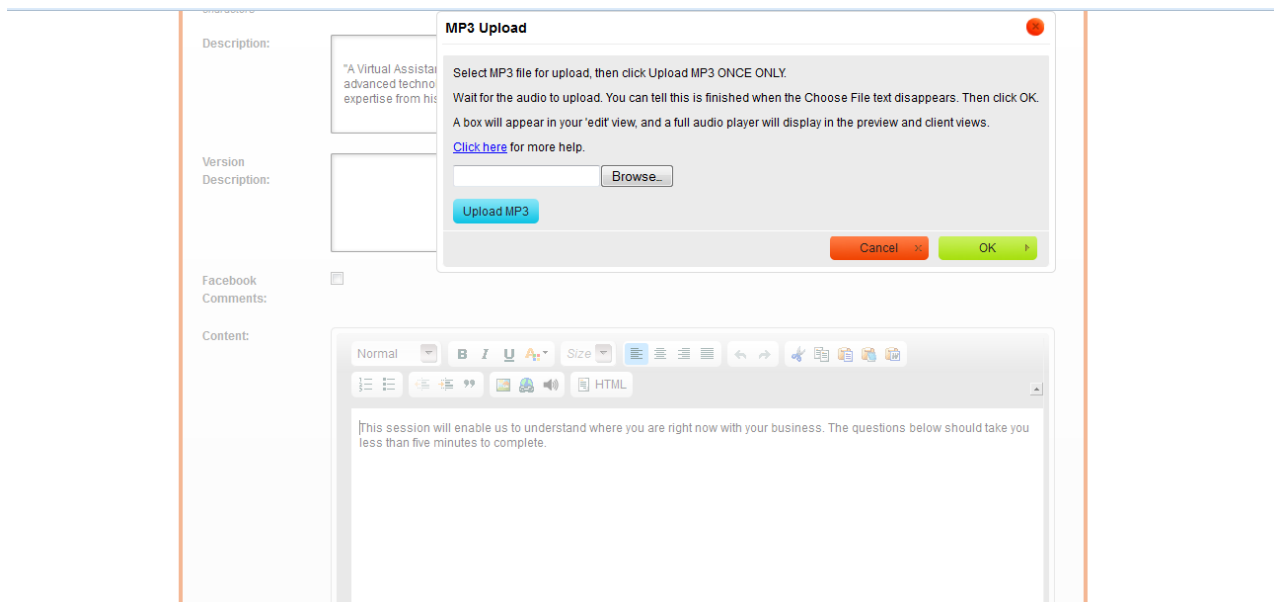
Adding Links

If you have text that you wish to link then simply type or paste the text in the content area of your module. Highlight the text and click on the link box on the format toolbar. A ***Link*** menu screen will pop up. Type or paste the URL in the URL menu box. Click OK. Your text will now be hyperlinked.

Let's move on to adding audio.

Adding Audio

If you wish to add audio to your module, you must ensure that the audio file is in **MP3** format. **Click** the speaker button on the Format toolbar.



A **MP3 Upload** screen will pop up. From here you will be able to **click** the **browse** button to select a file from your computer. Find the file that you wish to load, and **click** to select. **Click** on the **Upload MP3** button to import the file into your module.

Depending on the size of the file it may take a few moments to load. Once the file is loaded the **Browse** button and the **Upload MP3** button on the **MP3 Upload** screen will disappear, this is your confirmation that your audio file has been uploaded,

Once the **browse** button and the URL link information beside the browse button disappear, **click OK**. You will return to the content screen of your module

Please note, you will not see the actual audio file in the edit view.

To check that your audio file is indeed loaded click on the HTML button on the format toolbar. An edit screen with computer text will open. Look for text starting with the words, '**object data**' and ending with the text '**/object**' this is the text information for the loaded MP3 file.

Should you load the incorrect MP3 file and you wish to remove the audio file, simply click on the HTML toolbar. The MP3 edit screen will open. Look for the text starting with the words '**object data**' and ending with the text '**/object.**'










To **delete** simply highlight all the text between and including the words '**object data**' and '**/object.**', hit delete. The file will be removed. If you make a mistake and delete in error, just hit paste and the file will be replaced.

Once you are satisfied with your editing of this area, **click the HTML** button to return to your regular screen.

We can now move on the questions area of the module.

Module Questions

Some set questions have been included for you. You can use the provided questions as is. You can also **edit, delete, add, or reorder** the questions.

Module Questions			
Current Questions		Drag and drop questions to move them to the desired order	
	Number	Question	Actions
	1	Do you have an exit strategy?	Edit Delete
	2	Are you totally in control of your business? (rather than overwhelmed/running about like a headless chicken?)	Edit Delete
	3	Could your business run successfully if you went on holiday/maternity leave/under a bus?	Edit Delete
	4	Can you explain why people should buy from you rather than your competitors?	Edit Delete
	5	Do you know what your competitors are doing and how to use this to your advantage?	Edit Delete
	6	Are you aware of the values you hold and how these are shared with other people in your business?	Edit Delete
	7	Do you know what numbers are important to you to know whether your business is doing well and do you review them regularly?	Edit Delete
	8	Are you clear about how you define what success means for YOU?	Edit Delete
	9	Do you know what your brand is, and is it expressed in everything that you do?	Edit Delete

The '**EDIT**', '**DELETE**' feature is to the right of each question.

If you do not like the question simply delete it, by clicking the delete button to the right of that specific question.

If you wish to edit a set question then again, simply click on the edit button to the right of that specific question, type the changes that you wish to make in the pop up box. Make any required format changes from the format menu that will also open up, and then **click save**.

If you wish to **re-order** the questions then you can do so by simply clicking on the arrows on the left beside each question. **Click** and move the arrows up and down to reorder the questions.

To add a new question, simply type your new question in the area title 'Add Question.' Type your new question and then click add. Your new question will now appear at the bottom of the list of questions. If you do not like or wish to change the newly added question then click on the '**EDIT**', or '**DELETE**', button to the right of the question as just detailed above.

Once you are satisfied with your questions then you can move on to the next section on adding a new document to the module.

Documents

Here is the section where you can add documents, worksheets, graphs, and articles to your module. Your maximum file size limit is 10 megabytes.

Please note: You do not need to leave Jigsaw to add or upload an existing document.

To add or upload a file, **click** the **browse** button to the right of the '**SELECT FILE**' button.

From your computer choose the document, worksheet, additional reading, article etc., you wish to add.

Select the item. The file name will populate the '**SELECT FILE**', box. Next type a description of the file in the box below titled '**DESCRIPTION**,' then **click** the '**ADD NEW DOCUMENT**' button.

The file will take a moment to load. Once it is loaded you will be able to see the file name, file description, who uploaded it, and when. To the right of this information are the edit buttons, '**Download**' or '**Delete**'

Click the download button and the file will be downloaded into the module. **Click delete** and the selected file will be removed.

At this point if you are satisfied with all you have done **click Save Draft**.

You will be returned to the main module page. Find the module you were working on, **click** on the **edit** button to go back into the file. Scroll down to the bottom of the page and **click preview** to see how the module will appear to your clients.

In this view you will be able to see the font type and size, test your links, and see how the uploaded image, audio file, and the questions will look to your clients. You will also be able to download the file you attached. You will as well see how your personal information will appear to your clients.

This is the end of the **EDIT** feature of **MY MODULES**.

Now let's move on to learning how to create a new module.

Creating a New Module

To create a new module, click on the My Module tab. The modules screen will open.

Click on the **create module** tab. A module details screen will open.

You can now enter a title, a description, any content, and add questions. At this point you will see a message that you must save your file before adding any documents, **click Save Draft**.

You will be returned to the My Modules main screen. Your new module will now be in the list of modules. **Click** the **Edit** button to the right of the file name to make any changes or to add any documents. Once you are completely happy with your module then **click Save Draft**.

If you are now ready to add this new module to a package and make the module ready for sale, you must make the module live. Once again, click the **My Modules** tab to go into the modules screen. **Click** the **Make Live** button to the right of the new module.

Once you click the **Make Live** button you will get a message indicating that any client buying any package containing this module will get this version of the module. Previous purchasers of this package will not get this newer module version.

Please note once a new module is **made live** and a customer purchases the module, changes to the existing questions are **not** possible. New questions can be added but existing questions **cannot** be deleted or edited.

Changes on a purchased live module **are possible** to content, documents, images, and audio files.

If you are happy with your module and you are sure that your questions are as you would like **click OK**.

Your new module will now show in the Live Module section of the modules screen.

Module versions

If, after you have made a module live, you find that you do need to make changes to some of your existing questions you can do this by creating a newer version of the module.

In the **Live Modules** area of the **My Modules** screen find the module that you wish to change. **Click** on the **versions** button to the right of the module name.

A new screen will open, **click** on the **Create New Version** button. Add a description in the version description box

Add, delete, or change an existing question, in the question area, **click Save Draft**.

The new version will now appear in the **Live Module** area of the **My Module screen**, once you make the version **Live**.

Any new purchasers will receive this new version in their package. All previously purchased packages will still have the old version.

Re-Order Modules

If you wish to change the order of, or combine your modules you can do so by clicking on the Re-order modules button.

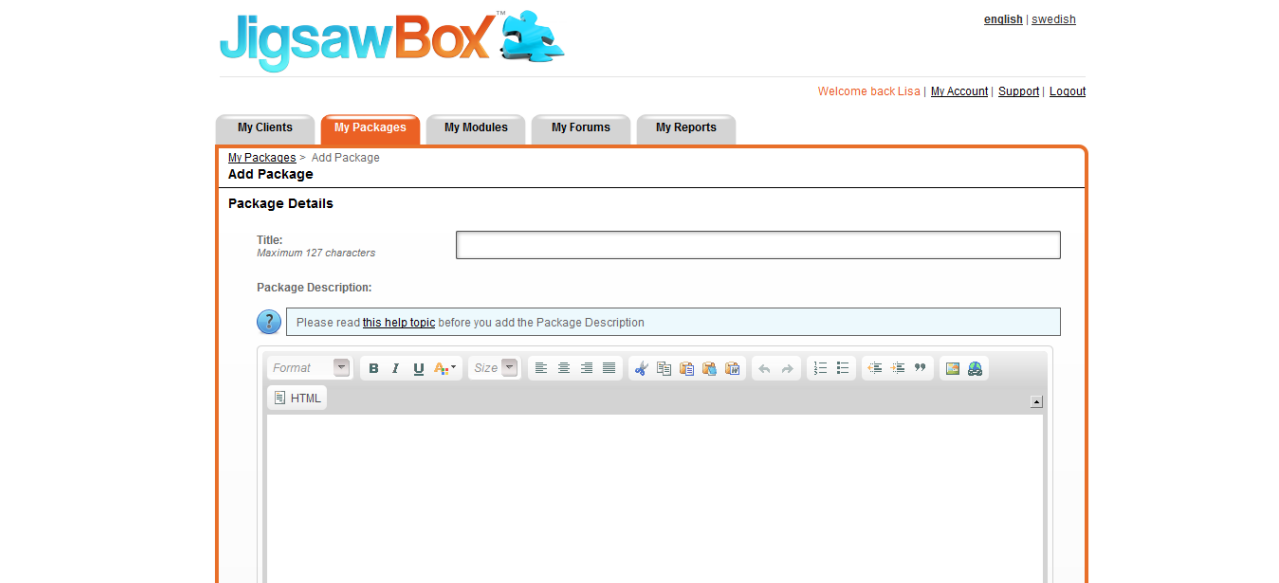
Click on the My Modules tab. The re-order tab is to the right of the Live Modules area. **Click** the Re-order modules tab. A re-order screen will appear showing all your live modules in their current order. You can drag and drop modules to combine or drag and drop into a new order. **Click Save** once you are done with the changes.

Back on the main My Modules screen you will now see the new order of your live modules. Combined modules will have an arrow to the right of the name of the module to indicate that it is combined. **Click** on this arrow to get a drop down of all the modules combined under that title.

STEP 2. Create A Package

Now that you have created your modules and made them live, you are now ready to package your modules to sell to your clients. Let's set up packages in your JigsawBox.

Click on the **My Packages** tab, on the main screen. Then **click** the **Add Package** tab to the right. The Package details screen will open. Here you will enter your package details and pricing.



Enter package title, a brief description of the package, trial period (if any), price of package, and the payment type and currency.

The next section is for the **alert email**; which is how the client can send emails to you. The client must check the **submit to coach** button for this function to work correctly and for you to receive emails.

The next section is the **Custom Welcome email**. Every client who purchases a package will receive a welcome email with their name, username and password, plus a link to their personal JigsawBox in order to login.

You can further customize your email to thank your client for purchasing your package, reminding them of why they chose your package and the services they can expect from you, and also remind them of any upcoming calls or services related to this purchase.

Next we have the **module selection section**; here you will decide what modules or sub modules to include in this package. You will do this by selecting the modules from **coach.availpackages** on the left column.

Drag and drop into the **coach.yourpackages** on the right column. You will also be able to change the order of the modules; you can drag and drop to re-order the modules once they are in the **coach.yourpackages** area. This way you can make a module the parent with many sub modules. Here you can also determine what modules to make available. So your client may see a module title on their dashboard but not be able to access the details until the time set by you.

In order to set up the time-release period, you will be prompted when you **click** on the module name in the **coach.yourpackages** area. A sub menu screen will open. This is where you will enter the number of days before a module becomes available. The date of registration of your client is used to calculate the days.

Packages are flexible in regards to the modules that you can add or delete or change the order of; however, once a client purchases a package you **will not** be able to make any changes to your **coach.yourpackages** area of a package.

The next section deals with branding of your packages.

General Branding

Here you will be able to customize each package for things such as background color, tabs and table header, button, logo, and font.

Once you have done this and if you are satisfied with the look of your package then **click Save**.

You will receive a message reminding you that once a client buys a package you will not be able to add or delete packages or add or delete questions within a module. You will of course be able to edit the content of a module. If you are sure then **click OK**.

You will then be returned to the main page and you will now see the link for the client login. This is the link that your clients will use to login to your JigsawBox to access their packages. The link is automatically done. JigsawBox takes it from your **My Account** page under **short company name**.

Please note, if you do change your **short company name** on your **My Account** page you will have to send an email to your clients with the new link or they will not be able to access your packages.

The other link that we will address is the client link.

Client Link

The client link is the link that you need to put on your website to start selling your packages. This is located under the tab called **Client Link** to the right of each package you create on the **My Packages** main screen.

Click on the **Client Link** tab, specific to each package. A box will open with the link information and the message that this is the link that your client will need to register for your package. Highlight, copy, close out the box and send link via email to your clients. You can also set up a sales page on your external website with the link under a **Buy Now** button on your sales page.

Editing Packages

The Edit feature for packages is located under the tab called **Edit** to the right of each package you create on the My Packages main screen. If you do have to make changes to a package then you will **click** the **Edit** tab button to the right of the package to be edited. An editing details screen will open up and you can make the required changes and **click Save**. You can also delete a package completely by **clicking** the **Delete** button.

Adding Clients

The **Add Client** tab is located under the tab called **Add Client** to the right of each package you create on the My Packages main screen.

To add a client, click **Add Client** and a new screen titled **Assign Package to Client** will open up. If your client is an existing JigsawBox user, then simply enter their username name in the section titled **Assign Package to Existing JigsawBox user**, then **click Assign**.

If the client is new, you will have to enter their details to set them up with a JigsawBox username.

Once this is all done then you are ready to start selling. Add the client link to your external website and start selling.



The easy to use online
coaching platform to
help you get more
clients and make more
money

GET YOUR 14 DAY TRIAL

Get started with Jigsaw at
<http://toolstouse.com/jigsawbox>



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