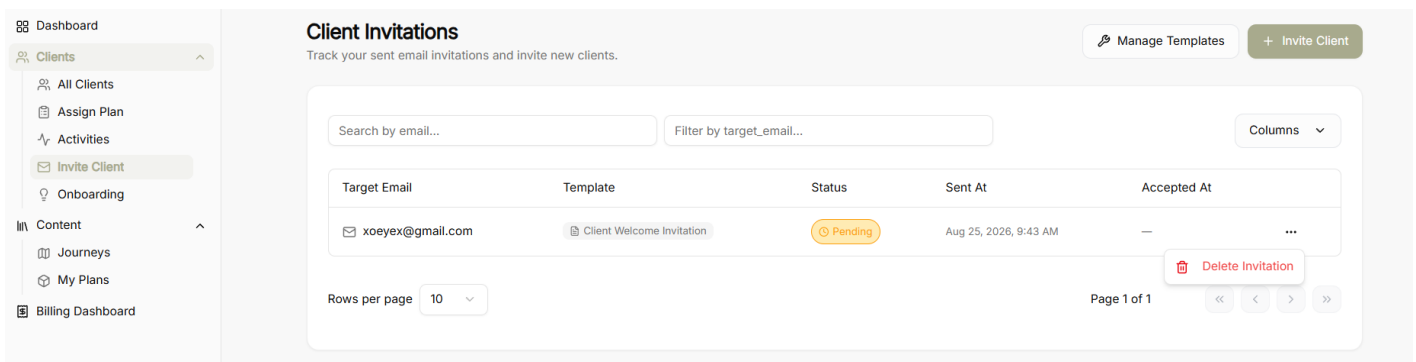


Mentor Alliance Business Coach Kit – Invite Client & Manage Templates

Mentor Alliance Business Coach Kit – Invite Client & Manage Templates



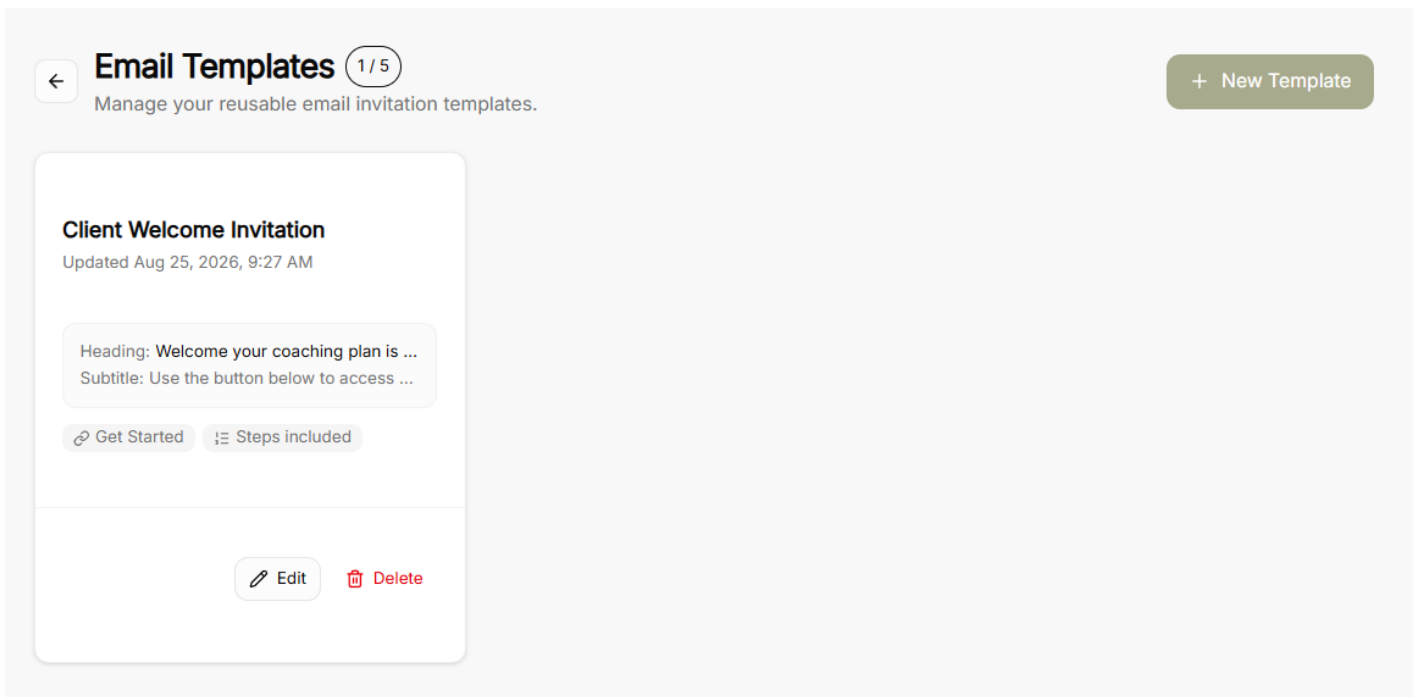
The **Invite Client** module allows coaches to dispatch custom, branded email invitations to prospective clients, track invitation statuses, and manage reusable email templates.

Client Invitations Overview Dashboard

- **Top Controls:**
 - **Manage Templates:** Opens the reusable invitation template manager.
 - **Invite Client:** Launches the guided 3-step invitation creation wizard.
- **Filter & Search Bar:** Search sent invitations by target email address or filter by column parameters.
- **Invitations Table Columns:**
 - **Target Email:** Recipient email address.
 - **Template:** The specific template used for the invitation.
 - **Status:** Current invitation delivery/acceptance state (e.g., *Pending*).
 - **Sent At:** Timestamp of when the email was sent.

- **Accepted At:** Timestamp of when the client accepted the invitation.
- **Row Actions (...):** Options to delete or revoke active invitations.

Email Templates Manager & Creation Modal



Create Email Template X

Design a customized invitation email for your prospective clients.

Editor Live Preview

TEMPLATE INFORMATION

Template Name * Email Heading *

e.g. Welcome Invitation e.g. You're Invited to Join

Email Subtitle (Optional)

e.g. Start your coaching journey today

MESSAGE BODY

Content

H1 H2 H3 B I

CALL-TO-ACTION BUTTON

Button Label * Button Size

Get Started Medium

Button Background Color Button Text Color

#a8a88d #ffffff

Button Destination URL: <https://coach-bernadette.buildrunkit.com>

Include Default Instructions

Appends 4 standard onboarding steps under the button to guide your clients. ☒

Cancel Create Template

- **Template List Screen:** Displays all saved reusable email templates with options to edit, delete, or create a **New Template**.
- **Create/Edit Email Template Modal:**
 - **Template Information:** Define the template name, main email heading, and optional subtitle.
 - **Message Body:** Rich text editor for formatting body copy (headings, bold, lists, links).
 - **Call-to-Action Button:** Customize button label text, size, background color, text color, and destination URL.
 - **Include Default Instructions Toggle:** Automatically appends 4 standard onboarding steps under the call-to-action button to guide new clients through sign-up.

Invite Client by Email Wizard

Step 1: Select Template

←

Invite Client by Email

Send a personalized, branded email invitation to prospective clients.

1

Select Template

2

Enter Email

3

Review & Send

Select Template

Choose an email template to use for this client invitation.

🔗 Manage Templates

Client Welcome Invitation

Updated Aug 25, 2026, 9:27 AM

Heading: Welcome your coaching plan is ready

Subtitle: Use the button below to access your a...

🔗 Get Started

☰ Steps included

→ Choose Template

- Choose an existing email template from your saved library or click **Manage Templates** to configure a new one.

Step 2: Enter Email



Invite Client by Email

Send a personalized, branded email invitation to prospective clients.



Select Template



Enter Email



Review & Send

Enter Email



Who are you inviting?

Enter your prospective client's email address.

Client Email Address *

client@example.com

We'll send the personalized invitation email to this address.

← Back

Review & Send →

- Enter the prospective client's email address where the personalized invitation will be sent.

Step 3: Review & Send

←

Invite Client by Email

Send a personalized, branded email invitation to prospective clients.

✓ Select Template

✓ Enter Email

3 Review & Send

Review & Send

 Sending invitation to:
testing@testing.com

Client Welcome Invitation

EMAIL PREVIEW

From:

Bernadette Coaching <noreply@coach-bernadette.buildrunkit.com>

To:

testing@testing.com

Subject:

Welcome your coaching plan is ready

 Bernadette Coaching

Welcome your coaching plan is ready

Use the button below to access your assigned plan

Hello,

You have been invited to join your coaching workspace.

Your coach has assigned a plan with guided activities and resources for you to complete. Sign in using the button below to create or access your account.

You can work through your assigned activities at your own pace. Your progress and responses will be available to you and your coach through the coaching workspace.

We look forward to working with you.

Get Started

Link to: <https://coach-bernadette.buildrunkit.com>

HOW TO GET STARTED

1. Click the button above to visit your coaching portal.

2. If you already have a BuildRunkit account, you can sign in with your credentials.

3. If you don't have an account yet, click "Create Account" and follow the steps.

4. Once signed in, you'll be taken to your coaching dashboard.

© 2028 Bernadette Coaching. All rights reserved.

← Back

 Send Invitation

- **Live Email Preview:** Renders the complete branded email layout, including coach profile header, custom messaging, call-to-action button, and onboarding instructions.
- **Final Actions:** Use **Back** to adjust details or **Send Invitation** to dispatch the email.

Revision #1

Created 2026-09-25 13:22:21 UTC by Bernadette F

Updated 2026-09-25 13:26:08 UTC by Bernadette F