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Enter Keyword Here... Search Here

Adding External Appointments into the Calendar

You can add external appointments to the calendar in order to manage and track all your events at one place.

You must specify the following details:

- Specify a **Subject** and a **Description** for your external appointment.
- Select a **Date** from the calendar.
- Specify a **Start Time** and **End Time**. You can either enter the time or select the time using the navigation arrows.
- Click **Add** to save the details.

Configuring Events in a Calendar

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You can use the calendar to track all your events. A Calendar enables you to add new events, view existing events on a monthly, weekly or a daily basis, and view approved events. To add external appointments into this calendar, click Pencil in External Appointment.

You can do the following:

- Click **month** to add new appointments or view existing appointments in the respective month.
- Click **week** to add new appointments or view existing appointments in a week.
- Click **day** to add new appointments or view existing appointments in a day.
- Click **<** and **>** arrows to navigate to the previous and next months, weeks, or days respectively.
- Click **All Events** to view all the events that are available in the calendar.
- Click **Approved Events** to view only the events that are approved.

Customer

This screen displays the features that are available in the **Customer** module. To begin with, you can view the list of registered and unregistered customers, add registered customers and register customers who are not registered with the coaching institute, and add subscriptions and associate them with active users. Bixera also enables you to track the subscription applications that are received from customers and register complaints or service requests on behalf of your customers.

You can do the following:

- Register or manage customer details
- Add subscriptions
- View subscription applications
- Register complaints or service requests

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Viewing and Managing Customers

You can view the list of all your customers, add registered customers or register customers who are not registered with the coaching institute.

You can view the following:

1. **Picture**: Displays the photograph of the customer.
2. **Name**: Displays the name of the customer.
3. **Status**: Displays the status. When you add an unregistered customer, the status is set to **Active**, by default. The status is **Pending for Approval**, when you link an unregistered customer with an existing customer and waiting for the customer to approve the process.
4. **Email**: Displays the email address of the customer.
5. **Number**: Displays the phone number of the customer.

You can also do the following:

- Click at the bottom of the screen to perform various operations.
- Click to add a registered or an unregistered customer. To add a registered customer to the coaching institute, click Add a registered Customer. You can only add customers who have registered through the website. To register an unregistered customer, click Add an Unregistered Customer.
- Click to search for a specific customer record. A search area appears at the top of the screen. Enter either the name of the customer, email address or the phone number and click to search for the respective record or click to clear the data.
- To export the list of all customers to a spreadsheet, click . You can export the records in this table into an Excel, CSV, XML, or a Text file. Click one of these values from the list to save the records into your local system.
- To filter customer records based on a specific criteria, click .
- Hover your mouse over the customer record and click to delete. You can only delete a customer who is waiting for acceptance.
- Hover your mouse over the customer record and click to modify the details, or click to terminate the subscription, or click to add

subscription for an active customer. Note that you can perform these operations only when the customer status is **Active**. You can click 

to link an unregistered customer with an existing customer. Note that the **Link User** option is available only for unregistered customers.

- Click  to close the options.

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Adding a Registered Customer

Using this screen, you can add a customer who has registered using the application. For example, a customer might register through the application to view various courses that are available in the coaching institute, but may not subscribe to any of the courses. Such customers are called registered customers. The details that a customer enters while registering through the application are saved in the database. You can use these details to associate courses with the customer.

When you add a registered customer, the application sends an email to the registered email address of the customer. Once the customer accepts the invitation, your coaching institute becomes the service provider by default.

To search for a specific customer record, specify the following:

1. Enter either the name, email address or the phone number that the customer had used at the time of registration.
2. Click to search for the matching records.
3. The search results that match either the name, email address or the phone number are listed.
4. Click to add the customer.

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Modifying the Details of an Active Customer

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You can modify the personal details of a customer using this screen. The details are displayed under two tabs, **Home** and **Contact**. The following details are displayed:

Home

1. **Name**: Displays the name of the selected customer, by default. You cannot change this value.
2. **Picture**: Click to select and upload a picture of the customer.
3. **Category**: Select a value from the drop-down list. The categories that you define in **Manage Office** -> **Office Setting** -> **Categories** tab are listed.
4. **Tags**: Select a value from the drop-down list. The customer tags that you define in **Manage Office** -> **Office Setting** -> **Categories** tab are listed.
5. **Note**: Enter more information about the customer.
6. **Documents**: Click to upload documents provided by the customer.
7. **Roll No:** Enter a roll number for the customer.
8. **Birth Date:** Click to select the birth date of the customer from the Calendar.
9. **Gender**: Enter the gender of the customer.
10. **Father Name**: Enter the father's name for the respective customer.
11. **Mother Name**: Enter the mother's name for the respective customer.
12. **Occupation**: Enter the occupation of the customer.
13. **Previous Exp**: Enter previous experience of the customer with the coaching institute, if any.
14. **Blood Group**: Enter the blood group of the customer.
15. Click to save the details or click to cancel.

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Modifying the Contact Details of an Active Customer

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You can add the contact details of an active customer using this tab. This includes the primary email address, secondary email address, phone number, and the postal address of the customer.

Contact

1. **Email**: Enter the primary email address of the customer.
2. **Number**: Enter the phone number of the customer.
3. **Contact Emails**: Click **+ Add** to add additional email addresses. You can save email addresses under **Home**, **Office**, and **Other** categories.
   - **TYPE:** Select a value from the drop-down list. The values are: **Home**, **Office**, and **Other.** Note that these values are system defined.
   - **EMAIL**: Enter the email address of the customer. This field is mandatory.
   - Click to save the record or click to cancel.
   - After you save the record, a icon appears adjacent to the email address in the table. Click this icon to edit the email address or the type of email address.
   - To delete the saved email address, hover your mouse over the email address and click . In the *Delete Contact Email* pop-up screen, click to delete or click to cancel the operation.
4. **Address**: Click **+ Add** to add postal address of the customer.
   - **Type**: Select a value from the drop-down list. The values are: **Home**, **Office**, and **Other.** You can save the postal address of the customer under relevant categories.
   - **Field 1, 2, and 3**: Enter the address in these fields. Note that **Field 1** is mandatory.
   - **City**: Enter the city. This field is mandatory.
   - **State**: Enter the state. This field is mandatory.
   - **Country**: Select a value from the drop-down list. This field is mandatory. Note that the values in the drop-down list are system

defined.

- **Pin Code**: Enter the pin code.
- Click to save the details or click to cancel.

5. Click to navigate to the Home tab, click to save the details, or click to cancel.

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Deleting a Registered Customer

You can delete only a registered customer who has not accepted your invitation. Consider an example where you add a registered customer and the application, by default, sends an invitation email to the registered email address of the customer. At this point, if the customer decides not to accept the invitation that is sent by the coaching institute for certain reasons, then the status remains **Waiting for Acceptance**. You can delete such registered customers who have not accepted your invitation over a period of time.

Note that you cannot delete a customer whose status is **Accepted**. In the *Delete Customer* pop-up screen, click to delete the registered customer or click  to cancel the operation.

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Viewing and Managing Customer Complaints and Service Requests

This screen displays the list of complaints or service request that you receive from the customer. Note that you can only record a complaint or a service request that you receive from a registered customer. You can record customer complaints, export the complaints to an Excel, CSV, XML, or a Text file, or create filters using this screen.

You can view the following:

1. **Originator**: Displays the name of the customer.
2. **Date**: Displays the date when the complaint or the service request was recorded.
3. **Type**: Displays **Complaint** or **Service Request** based on the type.
4. **Status**: Displays the status. The status is **Pending** when the complaint is recorded.
5. **Handler**: Displays the signature of the complaint or the service request handler.

You can also do the following:

- Click at the bottom of the screen to perform various operations.
- Click to add a complaint or a service request.
- To export the list of complaints or service requests, click . You can export the records in this table into an Excel, CSV, XML, or a Text file. Click one of these values from the list to save the records into your local system.
- To filter complaints or service requests based on a specific criteria, click .
- The initial status is **Pending,** when you add a complaint or a service request to the application**.** You can accept, reject, or enter additional details about the complaint or service request. Note the following:
  - Click to accept the complaint or service request. The status changes to **Investigating** after you accept. When the status is **Investigating**, you can close the complaint or the service request by clicking . The status changes to **Closed**. To assign a handler, click

. In the *Assign Handler* pop-up screen, enter the name of the handler, description, and click to assign or click to cancel.

- Click to reject the complaint or service request. The status changes to **Rejected** after you reject. You can only enter remarks when you reject a complaint or service request.
- Click to enter remarks. Click to submit the remarks or click to cancel. You can enter remarks when the status is **Investigating**, **Pending**, **Rejected**, or **Closed**.
- Click to close the options.

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Adding an Unregistered Customer

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Using this screen, you can add an unregistered customer to the application. For example, a customer might walk-in directly to the coaching institute to enquire and register for a particular course. Such customers are called unregistered customers.

You can enroll an unregistered customer by specifying the personal details, suitable course, and the contact details of the customer. The details are displayed under two tabs, **Home** and **Contact**.

You must enter the following details:

Home

1. **Name**: Enter the name of the customer. This field is mandatory.
2. **Picture**: Click to select and upload a photograph of the customer.
3. **Category**: Select a value from the drop-down list. The categories that you define in **Manage Office** -> **Office Setting** -> **Categories** tab are listed.
4. **Tags**: Select a value from the drop-down list. The customer tags that you define in **Manage Office** -> **Office Setting** -> **Categories** tab are listed.
5. **Note**: Enter more information about the customer.
6. **Documents**: Click to upload documents provided by the customer.
7. **Roll No:** Enter a roll number for the customer.
8. **Birth Date:** Click to select the birth date of the customer from the Calendar.
9. **Gender**: Enter the gender of the customer.
10. **Father Name**: Enter the father's name for the respective customer.
11. **Mother Name**: Enter the mother's name for the respective customer.
12. **Occupation**: Enter the occupation of the customer.
13. **Previous Exp**: Enter previous experience of the customer with the coaching institute, if any.
14. **Blood Group**: Enter the blood group of the customer.
15. Click to save the details and navigate to the Contact tab or click to cancel.

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Specifying the Contact Details of an Unregistered Customer

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You can specify the contact details of an unregistered customer using this tab. This includes the primary email address, secondary email address, phone number, and the postal address of the customer.

Contact

1. **Email**: Enter the primary email address of the customer.
2. **Number**: Enter the phone number of the customer.
3. **Contact Emails**: Click **+ Add** to add additional email addresses. You can save email addresses of a customer under **Home**, **Office**, and **Other** categories.
   - **TYPE:** Select a value from the drop-down list. The values are: **Home**, **Office**, and **Other.** Note that these values are system defined.
   - **EMAIL**: Enter the email address of the customer. This field is mandatory.
   - Click to save the record or click to cancel.
   - After you save the record, a icon appears adjacent to the email address in the table. Click this icon to edit the email address or the type of email address.
   - To delete the saved email address, hover your mouse over the email address and click . In the *Delete Contact Email* pop-up screen, click to delete or click to cancel the operation.
4. **Address**: Click **+ Add** to add postal address of the customer.
   - **Type**: Select a value from the drop-down list. The values are: **Home**, **Office**, and **Other.** You can save the postal address of the customer under relevant categories.
   - **Field 1, 2, and 3**: Enter the address in these fields. Note that **Field 1** is mandatory.
   - **City**: Enter the city. This field is mandatory.
   - **State**: Enter the state. This field is mandatory.

- **Country**: Select a value from the drop-down list. This field is mandatory.
- **Pin Code**: Enter the pin code.
- Click to save the details or click to cancel.

5. Click to navigate to the Home tab, click to save the details, or click to cancel.

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Linking an Unregistered Customer with an Existing Customer

You can associate an unregistered customer with an existing customer. Note that you can link an unregistered customer only with an existing customer.

You must specify the following details:

1. Enter the email address, name or the phone number of the unregistered customer whom you want to associate with another customer.
2. Click  to view the list of existing customers matching the search criteria.
3. Click  to associate the customer.

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Adding Subscription for an Active Customer Previous Top Next

You can define various kinds of subscriptions and associate it with a customer. When you add subscriptions for an active customer, the application sends an email to the registered email address of the customer to activate the subscription. A customer must accept the subscription.

Note that you can add subscriptions for an active customer only.

You must enter the following details:

1. **Customer**: Displays the name of the selected customer, by default. You can delete the name that is displayed and search for a specific customer.
2. **Subscription**: Select a value from the drop-down list. The values that you define in **Manage Office -> Subscriptions** are listed. This field is mandatory.
3. **Subscriber Name**: The name of the subscriber is displayed, by default.
4. **Subscription Date**: Click to select a date from the Calendar. This field is mandatory.
5. Click  to add subscription or click  to close.

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Creating Filters

You can create customized filters and use it regularly to search records matching the filter criteria. This enables you to see only specific records in the **Customers** table.

Create Filter

1. **Category**: Select a value from the drop-down list to filter records based on the selected category. The categories that you define in **Manage Office** -> **Office Setting** -> **Categories** tab are listed.
2. **Subscriptions**: Select a value from the drop-down list to filter records based on the selected subscription. The values that you define in **Manage Office -> Subscriptions** are listed.
3. **Tags**: Select a value from the drop-down list to filter records based on the selected tag. The customer tags that you define in **Manage Office** -> **Office Setting** -> **Categories** tab are listed.
4. **Status**: Click **Status** and select the check box to filter records based on the selected status. Select **All** to include all statuses in your filter. The values are system defined.
5. Click to view the records matching the selected filter or click to clear the data you specified or click to save the filter. Note that when you save the filter, it is listed under the **Saved Filter** tab.

Saved Filter

This tab displays the filters that you created and saved using the **Create Filter** tab.

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Terminating an Active Customer

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You can terminate the subscription of an active customer only. In the *Terminate Relationship* pop-up screen, enter the reasons for terminating the subscription. Click  to terminate or click  to cancel.

You can also terminate an unregistered customer when the status is **Pending for Approval**.

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Viewing Subscribers

You can view the list of all subscribers who have subscribed for various courses with the coaching institute.

You can view the following:

1. **Subscriber Name**: Displays the name of the subscriber.
2. **Status**: Displays the status. When you add a subscriber, the status is set to **Waiting for Approval**, by default. The status is **Pending for Approval**, when you link an unregistered customer with an existing customer and waiting for the customer to approve the subscription.
3. **Subscription**: Displays the course for which the customer has subscribed.

You can also do the following:

- Click at the bottom of the screen to perform various operations.
- Click to add a subscriber.
- Click to search for a specific subscriber. A search area appears at the top of the screen. Enter the name of the subscriber and click to search for the respective record or click to clear the data.
- To export the list of all subscribers to a spreadsheet, click . You can export the records in this table into an Excel, CSV, XML, or a Text file. Click one of these values from the list to save the records into your local system.
- To filter records based on a specific criteria, click .
- Hover your mouse over the respective subscriber record and click to modify the details.
- Click to close the options.

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Adding Subscriptions

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You can define various kinds of courses, define rules for each of these courses, set the fee structure, and define discounts for each of these courses that you define in the coaching institute.

You must enter the following details:

Main

1. **Name**: Enter the name of the course. This field is mandatory.
2. **Effective Start**: Click to select an effective start date from the Calendar.
3. **Effective End**: Click to select an effective end date from the Calendar.
4. **Description**: Enter more details about the course.
5. **Item ID**: Enter an ID for the course.
6. **Documents**: Click to upload documents for the course.
7. Click to navigate to the Rules tab or click to close.

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Defining Discounts for Subscriptions

You can define discounts for the various courses that you define in the coaching institute. Each course can contain different kinds of discounts. For example, you can set a payment mode based discount for cash payers. If you set a discount of 15% for cash payers, a customer paying through cash during registration can avail a discount of 15%.

You must enter the following details:

Discount

1. Click the arrow icon adjacent to **Add Discount** to add discounts.
2. **Maximum Discount**: Click **+Add** to specify the maximum discount for the course. You can specify the percentage of discount that can be issued for a range of minimum and maximum course price.
3. **Payment Mode Based**: Click **+Add** to specify the discount on a payment mode. You can issue a discount for one of these payment modes: cash, cheque, debit card, credit card, or a bank transfer.
4. **Day Based**: Click **+Add** to specify the discount for a specific day of the week. A customer can avail the discount while enrolling for the course on a specific day.
5. **Time Based**: Click **+Add** to specify the discount for a specific time of the day. A customer can avail the discount while enrolling for the course within the mentioned period.
6. **Customer Type Based**: Click **+Add** to specify the discount for a specific customer type.
7. **Location Based**: Click **+Add** to specify the discount for a specific location. Note that with location based discounts, a customer belonging to the specific location can only avail discounts.
8. **Volume Based**: Click **+Add** to specify the discount for a specific volume. A customer can avail this discount while enrolling for multiple courses.
9. **Subscription Based**: Click **+Add** to specify the discount for a specific subscription.
10. Click  to navigate to the Fees tab or click  to save the details or

click ✖ Cancel to close.

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Defining Fees for Subscriptions

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It is mandatory to define a specific fee amount for each course that you define in the coaching institute. Apart from defining the fee amount, you can also select the fee recurrence mode and choose to add a value added tax or a sales tax on the total fee amount. You can also choose to prorate the charge or accept complete payment when the customer enrolls after the course begins or decide if the subscriptions must start at the beginning of the month only.

You must enter the following details:

Fees

1. **Fee Recurrence**: Select a value from the drop-down list. You must define how the fee is collected from the customer. The values are system defined.
2. **Fee**: Enter the fees for the course and select a currency from the drop-down list.
3. **Pro Rate**: Select a value from the drop-down list. The values are system defined.
   - **Prorate the Charges**: Select this to prorate the charges. The customer will be charged only for the duration of the course attended. For example, if the course commences on the 1st of the month and the customer joins the course on the 15th, then the customer is charged only for those 15 days that the customer attends.
   - **No Proration, Accept only Complete Payment**: Select this to accept the complete payment without prorating. For example, the customer has to pay the complete fees even if he attends the course for 15 days only.
   - **Subscription Should Start Only from the Beginning of Month**: Select this if you want the subscription for the course to start at the beginning of every month.
4. **Tax To Be Applied**: Select a value from the drop-down list. The values are system defined. You can either associate a **Value Added Tax** or a **Sales Tax**. Accordingly, one of these taxes are added to the total fees amount.

5. Click to navigate to the Rules tab or click to navigate to the Discounts tab or click to close.

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Defining Rules for Subscriptions

You can define whether the subscription is a yearly, monthly or a weekly course and specify the number accordingly. Bixera helps you to automatically generate invoices and renewal notices for customers whose subscriptions are due for renewal. You can also define terms and conditions for each subscription.

You must enter the following details:

Rules

1. **Type**: Select a value from the drop-down list. You can either select **Year**, **Month**, or **Week** based on the duration of the course.
2. **Duration**: Specify the duration of the course. You can click the arrow icons to select a value.
3. **Allow Auto Generate Invoice**: Select the check box to automatically generate invoices for the customer.
4. **Allow Auto Renewal Notice**: Select the check box to automatically generate renewal notices for the customer.
5. **Terms And Conditions**: Enter the terms and conditions for the course.
6. Click to navigate to the Main tab or click to navigate to the Fees tab or click to close.

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Managing Subscriptions

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A coaching institute offers various kinds of courses. It is important to keep track of these courses, fee structure of each course, the start date when the course commences and the end date when the particular course concludes. This screen displays the list of all the courses that you define for your institute along with the start and end dates, subscription fees, fee types and the status of each course. You can click on each record to view or publish the respective course.

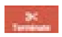
You can view the following details:

1. **Name**: Displays the name of the selected course, by default.
2. **Created Date**: Displays the date of creation of the respective course.
3. **Effective Start**: Displays the effective start date of the course.
4. **Effective End**: Displays the effective end date of the course.
5. **Subscription Fee**: Displays the subscription fees recorded for the respective course.
6. **Fee Type**: Displays the fee type selected while defining the course.
7. **Status**: Displays the status of the course. Initially, this is displayed as **Draft**.
8. Click to add subscription or click to close.

You can also do the following:

- Click at the bottom of the screen to perform various operations.
- Click to define a course.
- To export the list of all subscriptions to a spreadsheet, click . You can export the records in this table into an Excel, CSV, XML, or a Text file. Click one of these values from the list to save the records into your local system.
- Click to close the options.
- Click to modify the course details.
- Click to make a copy of an entire course with minor modifications. For more information, see Adding Subscriptions.
- Click to publish the course online. The selected course will be available on your profile page and the customers can view and register for

the respective course. The status of the respective course changes to **Published**.

- Click  to delete the course. You can delete courses that are no longer offered by the coaching institute.
- Click  to suspend the course temporarily. The status of the respective course changes to **Suspended**. You can suspend a published course only. You can resume or terminate a suspended course. Click  to resume the suspended course.
- Click  to terminate the course. The status of the respective course changes to **Terminated**. Note that you can still create a copy of a terminated course.

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Adding Subscribers

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A customer may want to subscribe for a particular course that is available in the institute. Using this feature, you can associate the respective course with the customer.

To add subscribers:

1. **Customer**: Click to select a customer from the drop-down list.
2. **Subscription**: Select a value from the drop-down list. The values that you define in **Manage Office -> Manage Subscription** are listed. This field is mandatory.
3. **Subscriber Name**: Enter the name of the subscriber.
4. **Subscription Date**: Click to select a subscription date from the Calendar. This field is mandatory.
5. Click  to save or click  to cancel.

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Modifying Subscriber Details

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You can modify the details that you specified while adding the subscriber.

Home

1. **Profile Name**: Displays the name of the subscriber. You can click the subscriber name, which is displayed as a hyperlink, to view the subscriber's profile page.
2. **Subscriber Category**: Displays the selected subscriber category. You can select a new value from the drop-down list to associate it with the subscriber.
3. **Status:** Displays the status of the subscription. You cannot modify this value.
4. **Subscription:** Displays the course to which the customer has subscribed. You cannot modify this value.
5. **Subscription Date:** Displays the subscription date. You cannot modify this value.
6. **Note**: You can enter more details about the subscription.
7. **Subscription Date:** Displays the next bill date. You cannot modify this value.
8. Click OK to save the details or click Cancel to cancel.

Payments

The application displays the **Payments** tab to view the income earned from this particular subscription. Click OK to save the details or click Cancel to cancel.

Activities

The application displays the **Activities** tab with details about who added the subscription and when was it added.

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Adding Filters for Subscribers

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You can create customized filters and use it regularly to search records matching the filter criteria. This enables you to see only specific records in the **Subscribers** table.

Create Filter

1. **Subscriber Category**: Select a value from the drop-down list to filter records based on the selected category. The subscriber categories that you define in **Manage Office** -> **Office Setting** -> **Categories** tab are listed.
2. **Subscription Date**: Select a value from the drop-down list to filter records based on the selected subscription date. The values are system defined.
3. **Tags**: Select a value from the drop-down list to filter records based on the selected tag. The customer tags that you define in **Manage Office** -> **Office Setting** -> **Categories** tab are listed.
4. **Status**: Click **Status** and select the check box to filter records based on the selected status. Select **All** to include all statuses in your filter. The values are system defined.
5. **Next Bill Date**: Select a value from the drop-down list to filter records based on the next bill date. The values are system defined.
6. Click to view records matching the selected filter or click to clear the data you specified or click to save the filter. Note that when you save a filter, it is listed under the **Saved Filter** tab.

Saved Filter

This tab displays the filters that you created and saved using the **Create Filter** tab.

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Viewing Subscription Applications

You can view the list of all subscription applications that are received from the customers.

You can view the following:

1. **Requester**: Displays the name of the customer who requested for subscription.
2. **Status**: Displays the status of the application. The status is **Pending** initially.
3. **Date**: Displays the date when the customer subscribed for the course.

You can also do the following:

- Click at the bottom of the screen to perform various operations.
- To export the list of all subscription applications to a spreadsheet, click . You can export the records in this table into an Excel, CSV, XML, or a Text file. Click one of these values from the list to save the records into your local system.
- To filter subscription applications, click .
- Click to accept the subscription application. The status changes to **Approved** after you accept. Bixera sends an email to the customer indicating that the subscription application is approved.
- Click to reject the subscription application. The status changes to **Rejected** after you reject.

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Adding Filters for Subscription Applications Previous Top Next

You can filter records based on the status of the application.

Create Filter

1. **Status**: Select a value from the drop-down list to filter records based on the selected status. You can select one of these to filter records:
   - **All**: Select **All** to display all subscription applications.
   - **Pending**: Select **Pending** to view subscription applications that are received from the customer.
   - **Approved**: Select **Approved** to view only those subscription applications that are approved by the institute.
   - **Rejected**: Select **Rejected** to view subscription applications that are rejected by the institute.
   - Click to view the records matching the selected filter or click to clear the data you specified or click to save the filter. Note that when you save the filter, it is listed under the **Saved Filter** tab.

Saved Filter

This tab displays the filters that you created and saved using the **Create Filter** tab.

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Recording Complaints or Service Requests

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This feature allows you to record complaints or service requests that you receive from the customer. A customer complaint or a service request highlights problems within the coaching institute. It may be related to a particular product, service, or a course that the coaching institute offers or it might be related to the availability of faculty members or various resources.

You must enter the following details:

1. **Originator**: Click to enter one or more characters in the text box. When you start typing the name of the customer, the records that match the characters you specify are listed. Click on the respective customer name to select it.
2. **Description**: Enter more details about the complaint or the service request.
3. **Tags**: Select a value from the drop-down list. The customer tags that you define in **Manage Office** -> **Office Setting** -> **Categories** tab are listed.
4. **Documents**: Click to upload documents provided by the customer.
5. **Type**: Select either **Complaint** or **Service Request**.
6. Click to save the details or click to cancel.

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Filtering Complaints

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You can create customized filters and use it regularly to search records matching the filter criteria. This enables you to see only specific complaints in the **Complaints** table.

Create Filter

1. **Date**: Select a value from the drop-down list to filter records based on the selected date. The values are system defined.
2. **ComplaintTypeOrSr**: Select the check box in the drop down list. You can choose one of these values: **All**, **Complaint**, or **Service Request**.
3. **Status**: Click **Status** and select the check box to filter records based on the selected status. Select **All** to include all statuses in your filter. The values are system defined.
4. **Tags**: Select a value from the drop-down list to filter records based on the selected tag. The customer tags that you define in **Manage Office** -> **Office Setting** -> **Categories** tab are listed.
5. Click to view records matching the selected filter or click to clear the data you specified or click to save the filter. Note that when you save the filter, it is listed under the **Saved Filter** tab.

Saved Filter

This tab displays the filters that you created and saved using the **Create Filter** tab.

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Subscribing for a Course

A coaching institute offers several services, products, and various courses. You can subscribe for any of these. You can view the service provider details and also request for an appointment with the coaching institute. This page also displays the ratings based on how other customers have rated the respective coaching institute.

You can view the following:

Home

1. **Request Appointment**: Click to request an appointment with the selected coaching institute.
2. **View Service Provider**: Click to view the service provider.
3. **Category**: Displays the category to which the coaching institute belongs.
4. **Rating**: Displays the ratings given by other customers for the respective coaching institute.
5. **Location**: Displays the location of the selected coaching institute.

Products

Displays the list of products that the selected coaching institute offers to customers.

Services

Displays the list of services that the selected coaching institute offers to customers.

Subscriptions

Displays the list of subscriptions that the selected coaching institute offers to customers. Note that the subscriptions, which are defined and published for the respective institute, are listed. You can view the following:

6. **Name**: Displays the name of the subscription.
7. **Subscription Fee**: Displays the subscription fee.
8. **Fee Type**: Displays the fee type.
9. Hover your mouse over a course and click to subscribe for the course. When you click and enter the required details, the application sends an email to the institute that you selected.

Contact

Displays the email address, contact address, and the office timings of the respective institute.

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Applying for Subscription

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You can apply for a selected course in the institute, upload required documents and choose to renew the course automatically. The application emails these details to the selected institute.

You can view the following:

1. **Requester**: Displays the name of the institute.
2. **Subscription**: Displays the name of the course.
3. **Renew Automatically**: Select the check box to renew your subscription automatically at the end of the billing cycle.
4. **Notes**: Enter additional details, if any.
5. **Documents**: Click to upload required documents.
6. Click **[Apply]** to apply for the subscription or click to cancel. Bixera displays a message indicating that the application is submitted successfully when you click **[Apply]**.

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Subscription Application Submission

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When you click **[Apply],** the application displays a message indicating that your subscription application has been sent to the respective institute successfully. You will receive a message when the institute approves your application.

Modifying the Details of an Active Customer

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You can modify the personal details of a customer using this screen. The details are displayed under two tabs, **Home** and **Contact**. The following details are displayed:

Home

1. **Name**: Displays the name of the selected customer, by default. You cannot change this value.
2. **Picture**: Click to select and upload a picture.
3. **Category**: Select a value from the drop-down list. The values that you define in ...... are listed.
4. **Tags**: Select a value from the drop-down list. The values that you define in ...... are listed.
5. **Note**: Enter more information about the customer.
6. **Documents**: Click to upload documents provided by the customer.
7. **Roll No:** Enter a roll number for the customer.
8. **Birth Date:** Click to select the birth date of the customer from the calendar.
9. **Gender**: Enter the gender of the customer.
10. **Father Name**: Enter father's name for the respective customer.
11. **Mother Name**: Enter mother's name for the respective customer.
12. **Occupation**: Enter the occupation of the customer.
13. **Previous Exp**: Enter previous experience of the customer with the coaching institute, if any.
14. **Blood Group**: Enter the blood group of the customer.
15. Click OK to save the details or click Cancel to cancel.