Yo!Coach

Admin Manual

-Version 4.3-

Yo!Coach

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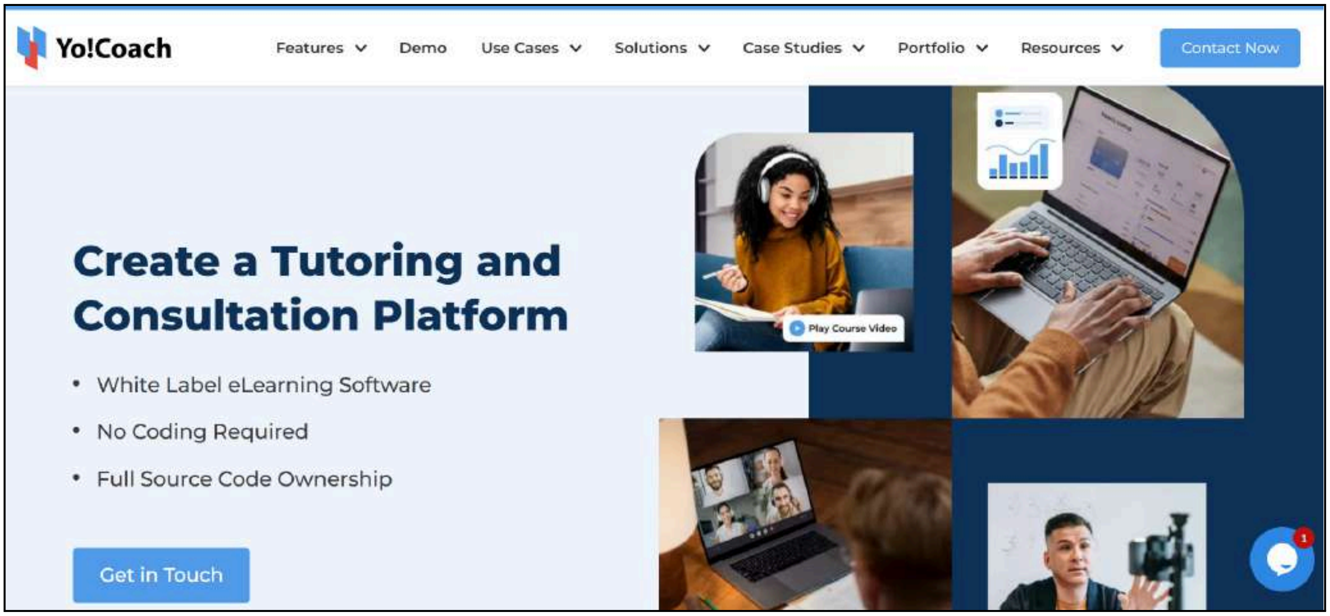
What is Yo!Coach?

Yo!Coach is a comprehensive, ready-to-use software solution designed to build a tutoring and consultation platform with integrated video conferencing functionality.

This eLearning platform comes with a range of interactive features that ensure seamless navigation and efficient workflows for both learners and teachers.

As a fully customizable solution, Yo!Coach can be tailored to support a variety of essential functions found in popular platforms such as Verbling, Preply, Italki, and Cambly.



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1. Admin login

The admin panel provides comprehensive access to all settings for managing and overseeing operations for all users, including teachers, learners and affiliates registered on the platform.

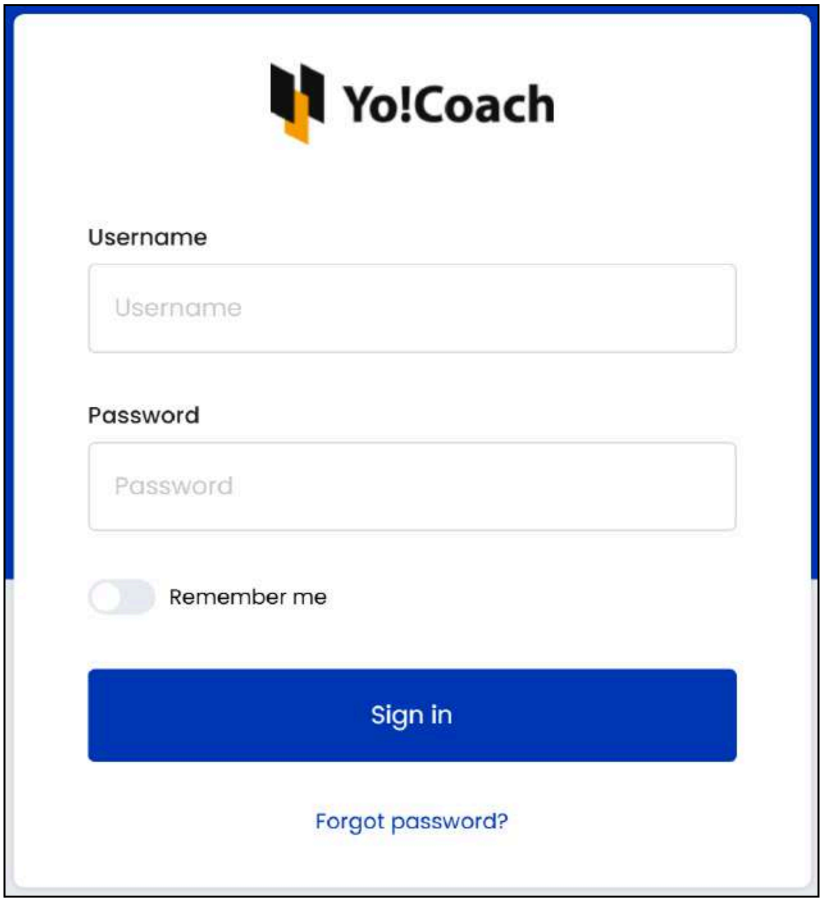
Access the admin panel

Open a web browser and type your platform's URL in the address field, followed by */admin/admin-guest/login-form* to reach the login page.

Example:

If your platform's name is Growcer and the domain URL is *onlinetutoring.yo-coach.com*, the admin panel login page URL will be:

https://onlinetutoring.yo-coach.com/admin/admin-guest/login-form.



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Fill in the fields:

- **Username*:** Enter your username.
- **Password*:** Enter your password.
- **Remember me:** Turn on this toggle switch to allow the system to remember your login details.

  When enabled, you will remain signed in, even if you close the browser window, and will automatically be signed in upon returning.

  Leave this **off** or turn it **off** to disable this feature.

  *Avoid turning on the **Remember me** option when using a public or shared computer.*

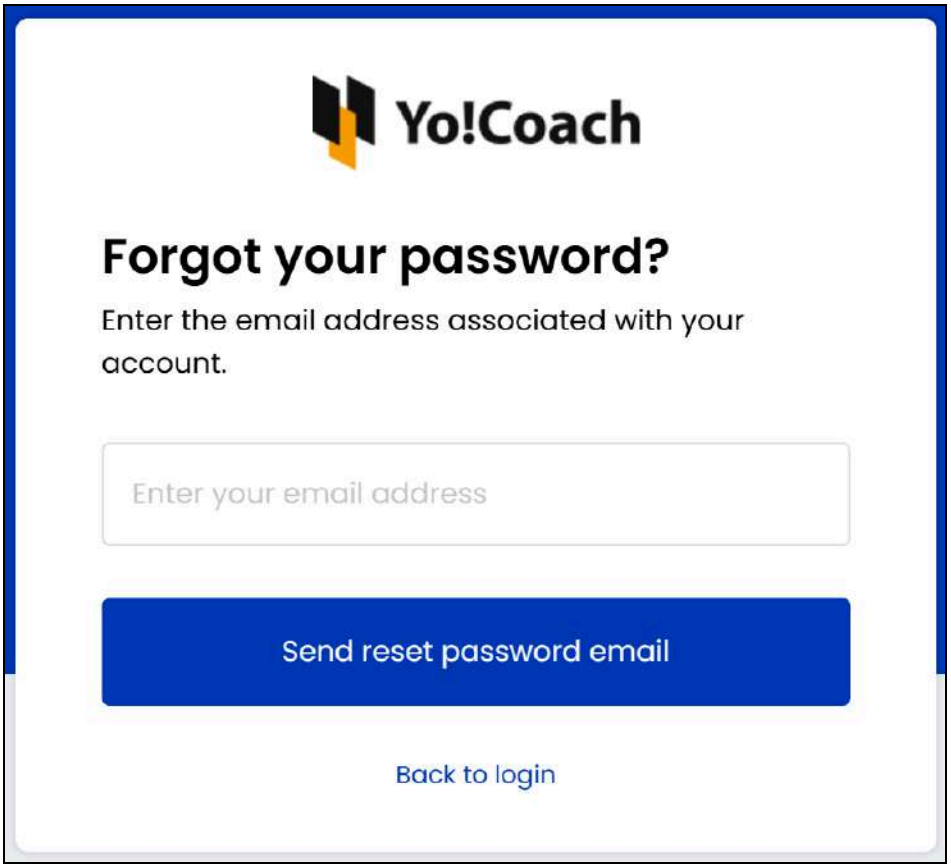
  Refrain from enabling this option on devices that you do not use frequently or cannot lock to secure your browser.

Once the fields are completed, click **Sign in** to proceed.

Forgot password

If you forgot or lost your password, change or reset it by selecting **Forgot password?**

This directs you to the **Forgot your password** page.



*If you accidentally selected this option, click **Back to login** to return to the login page.*

If you are on the correct page, enter your registered email address.

Ensure you use the email address linked to your admin account. If you enter an incorrect email address, an error message will appear.

Then, click **Send reset password email.**

The system will send a **password reset link** to your registered email address. A confirmation message will appear at the bottom of the page.

If you have already requested a password reset link, the system will display an error message asking you to wait 24 hours before submitting another request.

Reset password

Check your email inbox, open the password reset email, and click the reset link provided.

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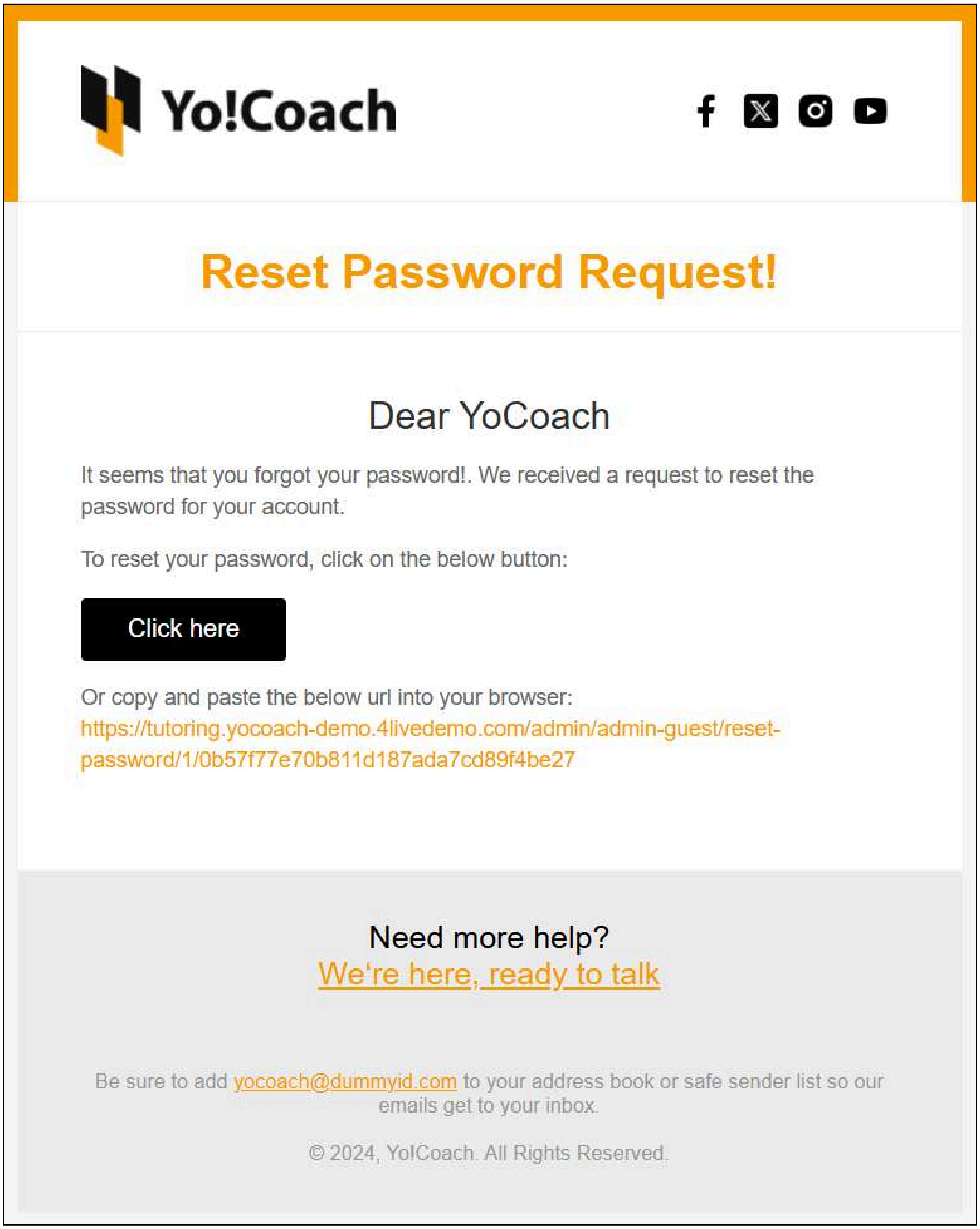

This will direct you to the **Reset password form**.

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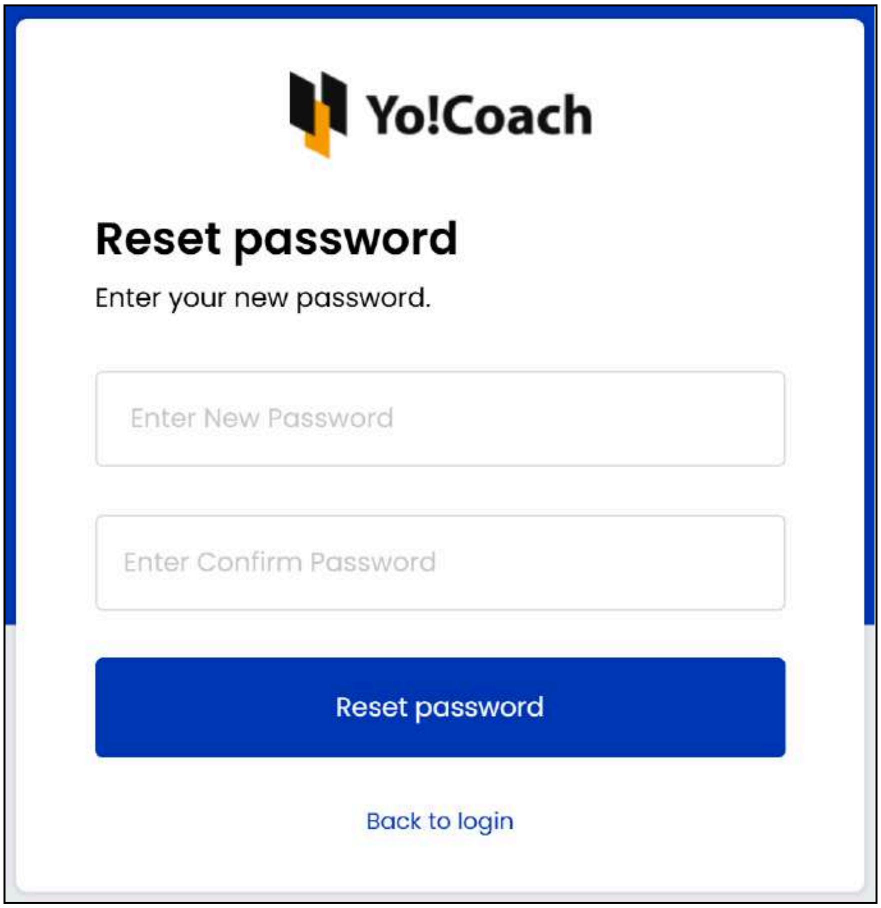


Fill the following information:

- **Enter new password:** Enter your new password, ensuring it is strong and contains at least 8 characters.

  The password is case-sensitive, meaning "A" and "a" are treated as different characters.

  For better security, use a long password that combines alphanumeric characters, including both letters and numbers.

- **Enter confirm password:** Re-enter the new password you entered in the previous field.

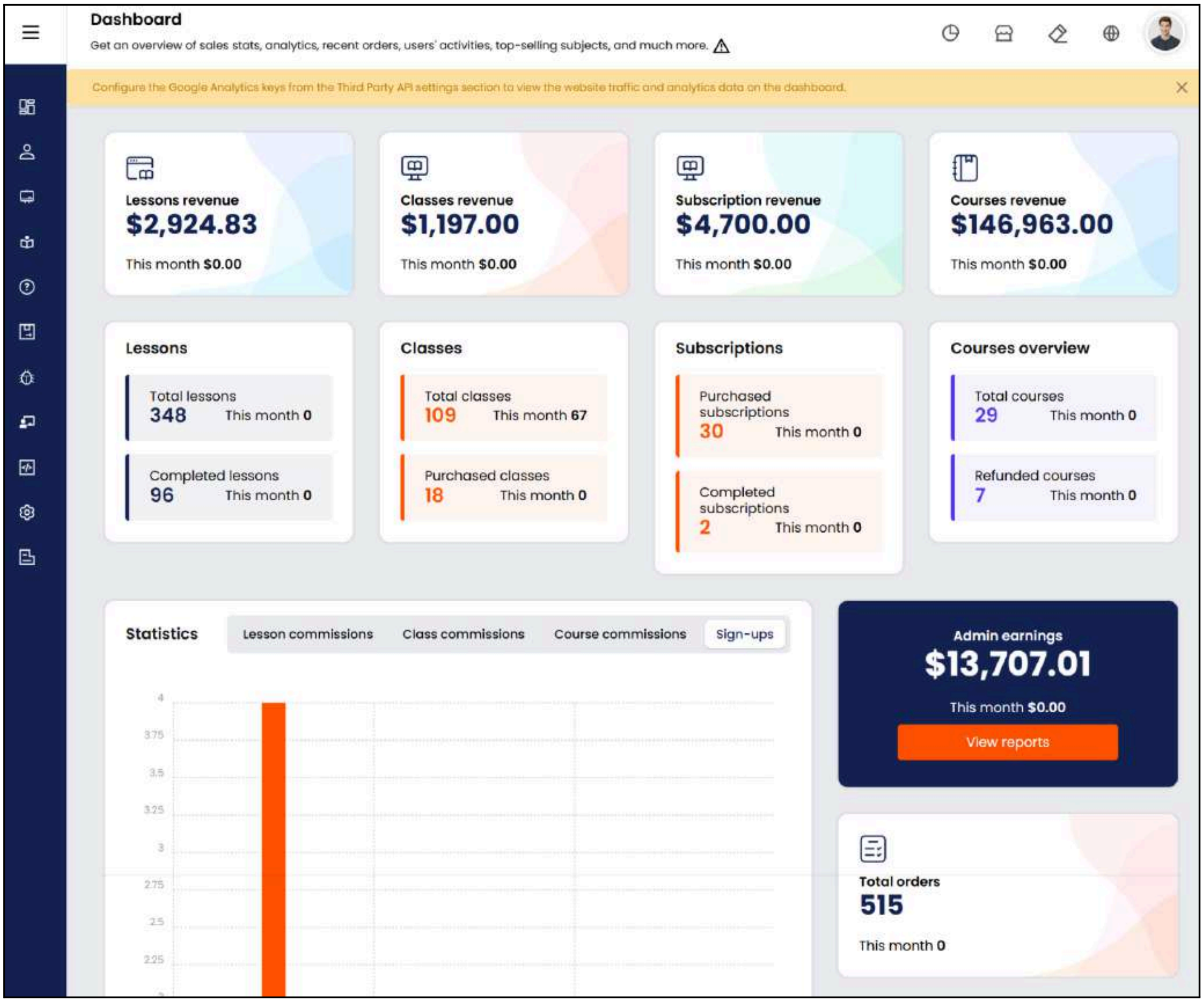
  If the passwords do not match, an error will be displayed, and you will not be able to proceed.

Once both fields are completed, click **Reset password**.

This action updates your password and redirects you to the login page. Use your new password to sign in to the admin panel.

2. Dashboard

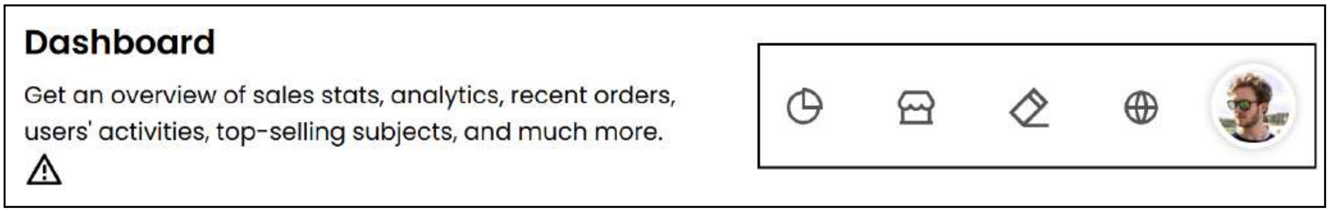
When you log in, you are redirected to the Dashboard, which is the default landing page for the admin panel. The dashboard includes several visual tiles, displaying information including Revenue stats, Users and Lessons stats.



Let us walk through each segment one by one to understand them:

2.1 Top navigation bar

In the upper-right corner, there are five buttons that allow you to navigate around the system and take actions accordingly.



These buttons are static and remain in the same position regardless of the page you visit on the admin panel.

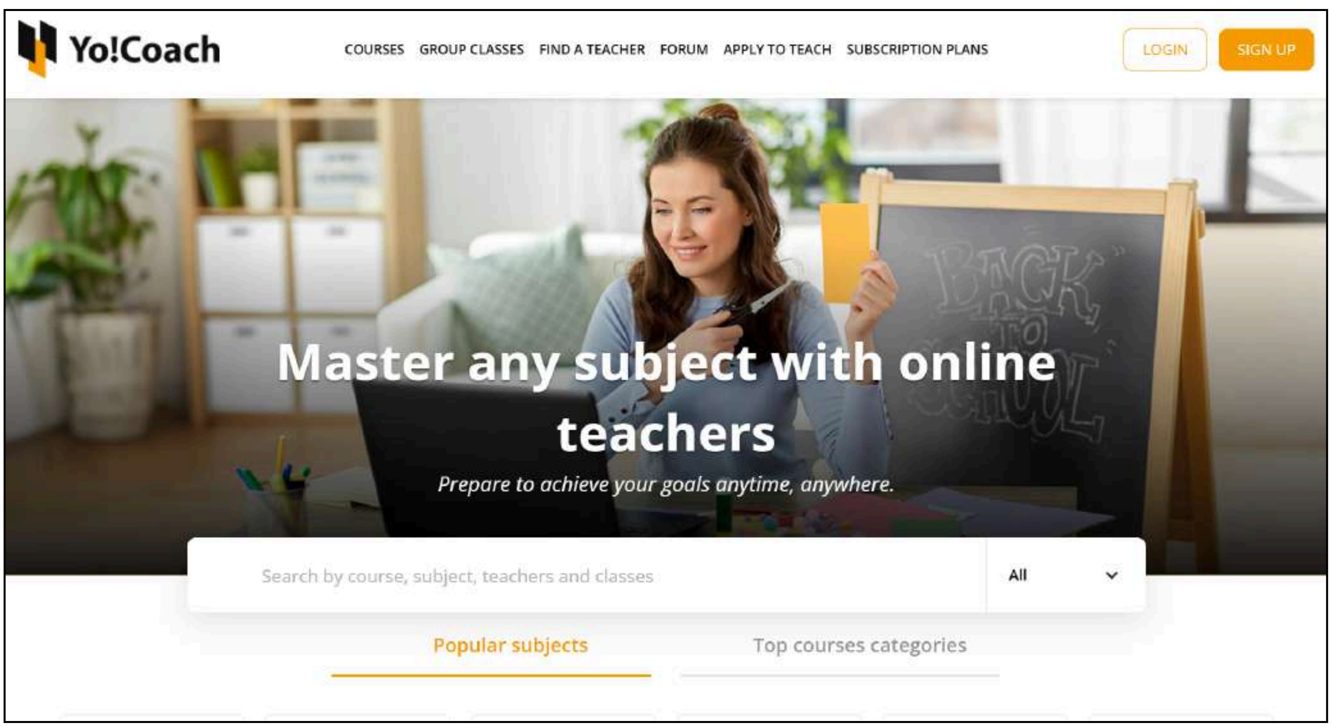
Below is an explanation of each button:

2.1.1 Regenerate stats

Click to refresh the admin panel and update the Dashboard page with the latest statistics.

2.1.2 View portal

Click to open the Yo!Coach front-end in a new window.



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2.1.3 Clear cache

Click this button to clear the platform's cache when necessary, particularly after updating the language labels or modifying any media or CMS content.

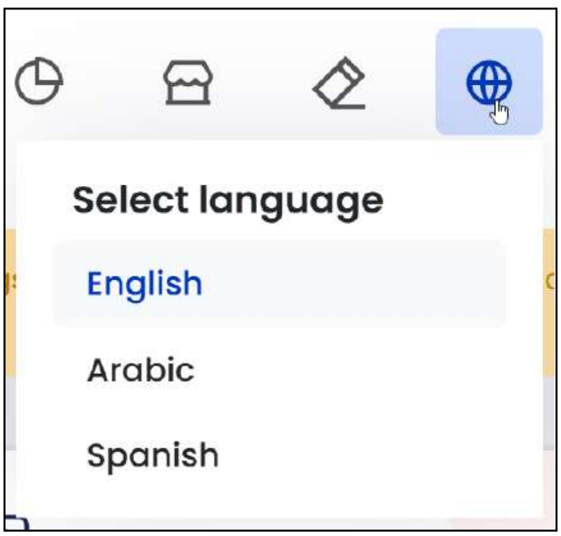
Clearing the cache helps optimize the platform's loading speed and ensures that all updates are properly reflected.

A confirmation message will appear, and the page will refresh automatically.

2.1.4 Language

Click this to change the language of the admin platform.

A menu will appear below, listing all available languages in the system.



The language options and the number of languages in the dropdown menu will depend on the languages selected during platform setup.

If only one language was chosen during setup, only that language will be visible here.

To add more language options, contact the Yo!Coach team.

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Note that your language selection will only apply to your dashboard and will not impact the language settings for other users, such as teachers, learners, or affiliates.

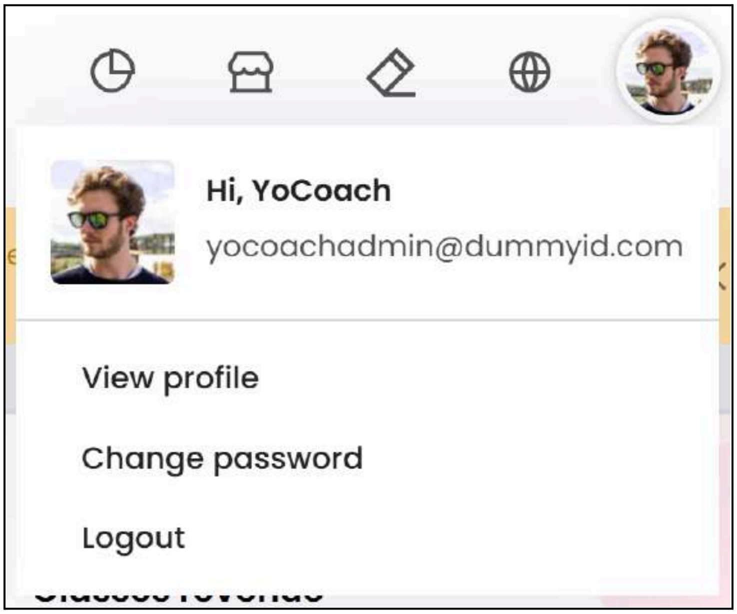
Each user dashboard will open in the primary language by default, but users can choose their preferred language from the available options.

2.1.5 User 

This button, located in the upper-right corner of the dashboard, allows you to access and manage your profile.

If you have uploaded a profile picture, the button will display your picture; otherwise, it will display a ***profile picture icon****.*

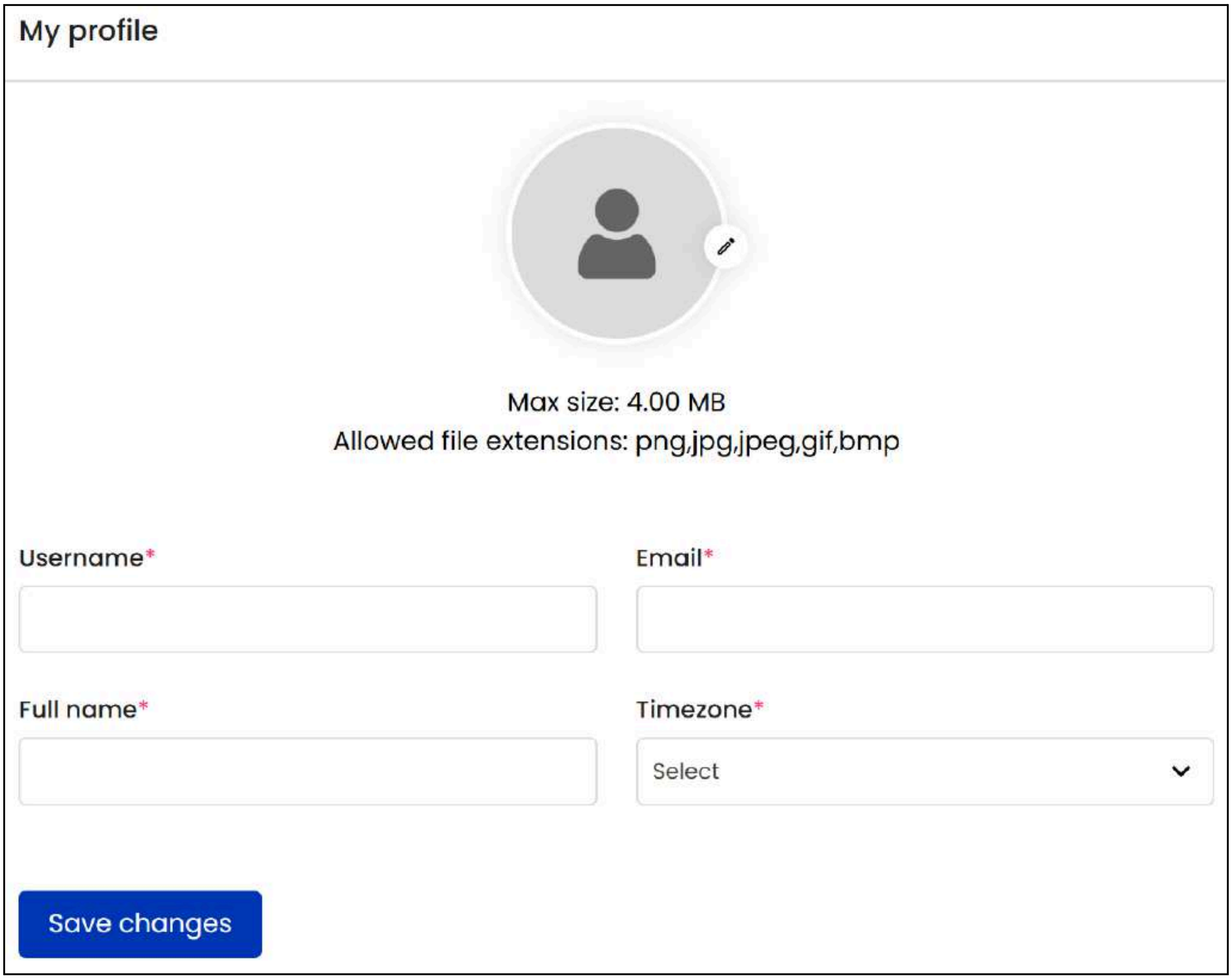
Clicking the user button will reveal a small dropdown menu containing quick navigation links for managing your account, including My profile, Change password, and Logout.



Select an option to navigate to the corresponding page:

a. View profile

Select this to update your username, profile image, email, and full name.



Update the following under this form:

- **Profile image:** By default, there will be a user profile icon added as the image. To upload your profile image, click , select the picture from your system and click **Open**.

  The image will open in an image editor pop-up, in the middle of the screen.

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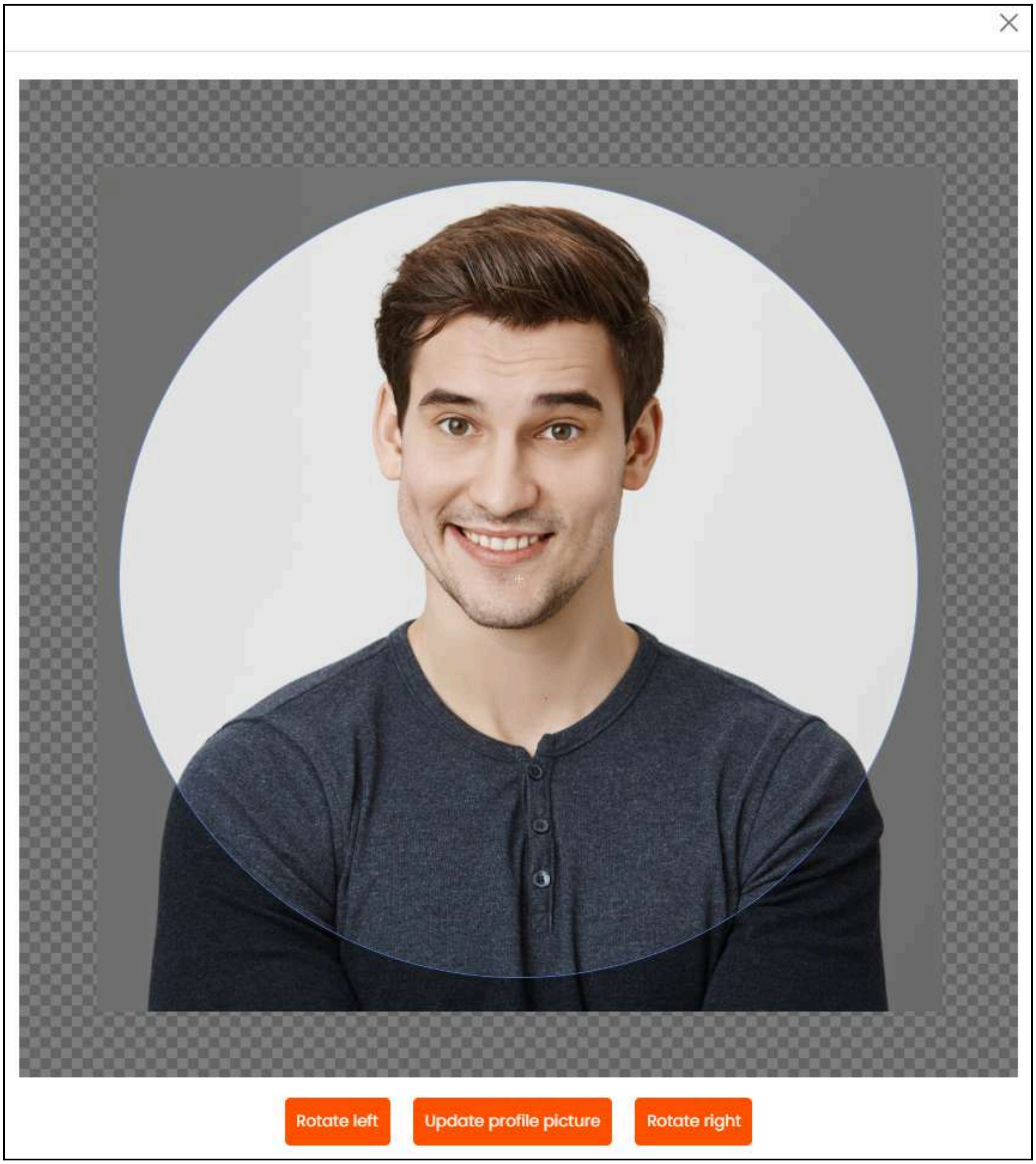

Use the buttons available to make adjustments to the image.

Zoom the image in or out by using the scroll button on your mouse.

Once done, click **Upload profile picture** to upload it. And the profile picture will be uploaded.

To cancel the process, click X in the upper-right corner of the pop-up form.

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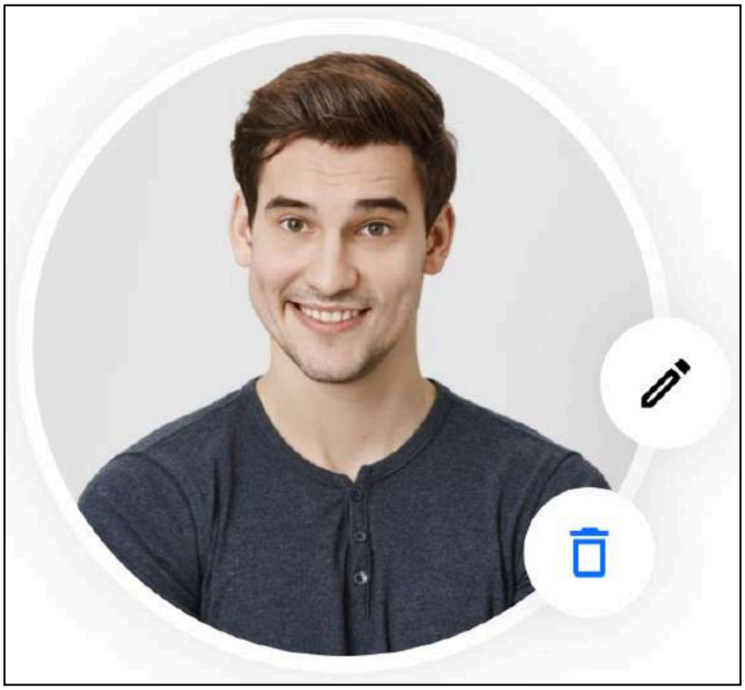
After the image is uploaded, a delete button will appear below the edit button in the image field.



Click  to remove the image. Once deleted, the default user profile icon will be displayed in the image field.

- **Username*:** This field will be prefilled with your current username. Edit it as per your requirements

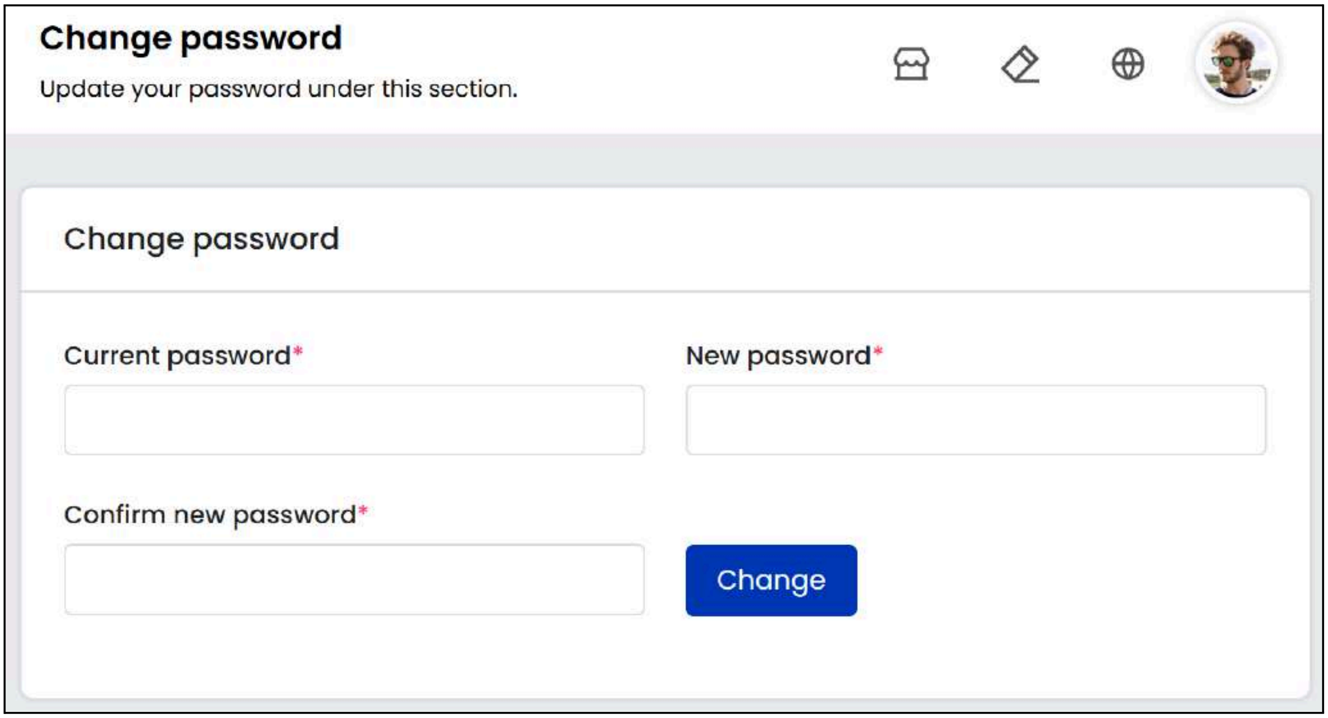
  A username is a unique identifier used to log into the system. Hence, choose one that will be easy for you to remember.

- **Email*:** The field will be prefilled with your current email address. Edit it as per your requirements.
- **Full name*:** The field will be prefilled with your current name. Edit it as per your requirements.
- **Timezone*:** Select the timezone your business operates in from the dropdown list.

Click **Save changes** to apply the changes.

b. Change password

Select this to change your account password, which will redirect you to the **Change password** form.



Enter the following:

- **Current password*:** Enter the current password to authenticate the change.
- **New password*:** Enter your new password. Ensure it is strong, with at least 8 characters.

  The password is case-sensitive, meaning "A" and "a" are considered different characters.

  For better security, use a longer password with a mix of alphanumeric characters (numbers and letters).
- **Confirm new password*:** Re-enter the new password you provided in the previous field.

  If the passwords do not match, an error will be displayed, and you will not be able to proceed.

Click **Change**.

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c. Logout

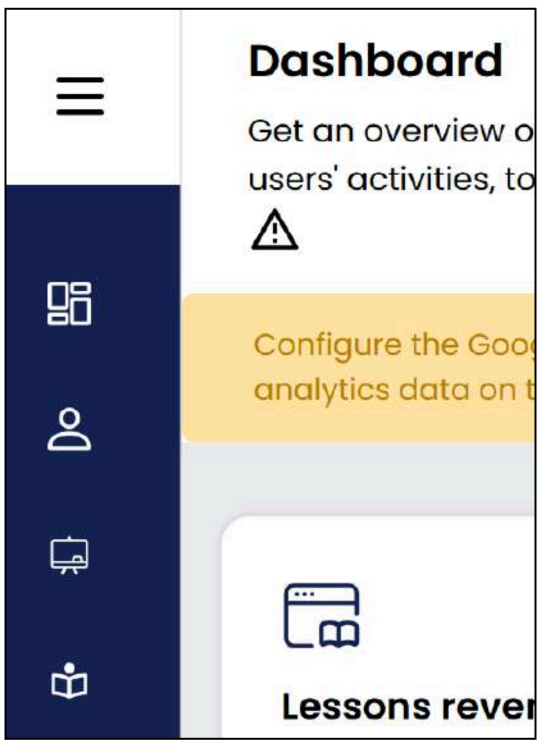
Select this option to terminate the current session, log out of your account, and return to the admin login page.

A session's idle time is 20-25 minutes (this duration cannot be adjusted, even at the code level). This implies that each session is automatically terminated after 20-25 minutes of inactivity. To avoid logging in again and again, activate the [remember me](#) feature when logging in.

When logged out, you will have to log into the platform again.

2.2 Left navigation bar

The left side of the dashboard features a vertical navigation bar with a **hamburger menu button** ☰ at the top and a row of icons below.



By default, the navigation is hidden but will appear when you hover over any icon, displaying the platform modules in a folder-style layout.

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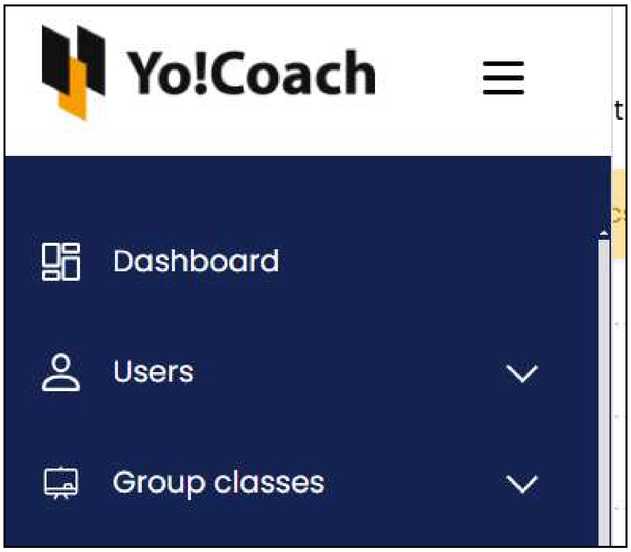
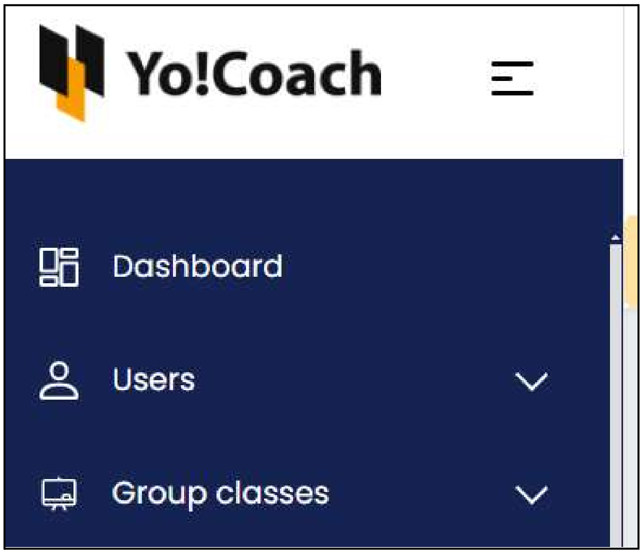


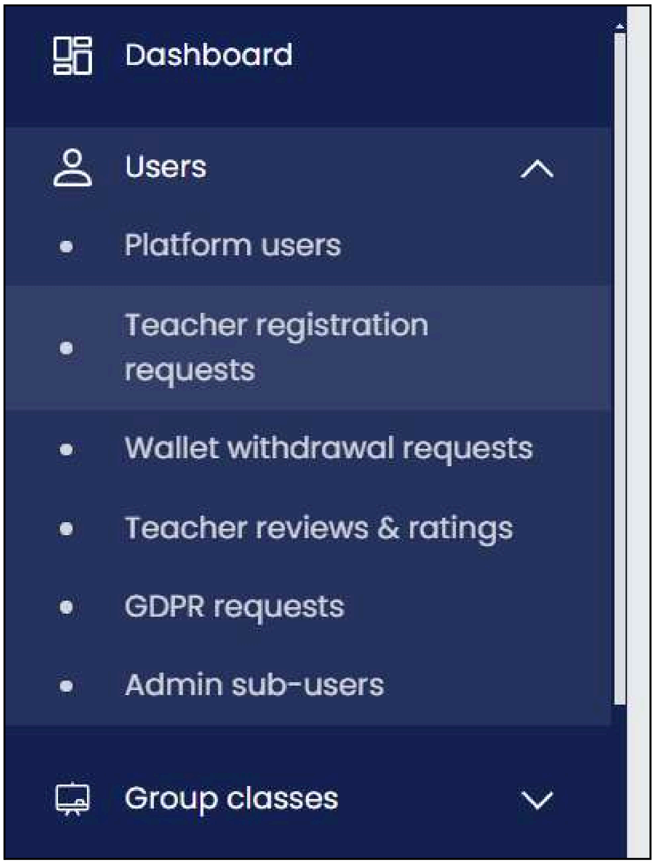
The menu will collapse when you move the mouse away. To keep it static, click ☰. This will convert the menu into a fixed position.



To collapse it again, click ☰, and the menu will convert into a non-static menu.

This menu provides access to the dashboard's modules and submodules for managing and setting up the platform.

To access a submodule, select the main module, and a dropdown will display the submodules under it.



Select the desired submodule to navigate to its page, where you can perform the relevant actions.

2.3 Quick stats

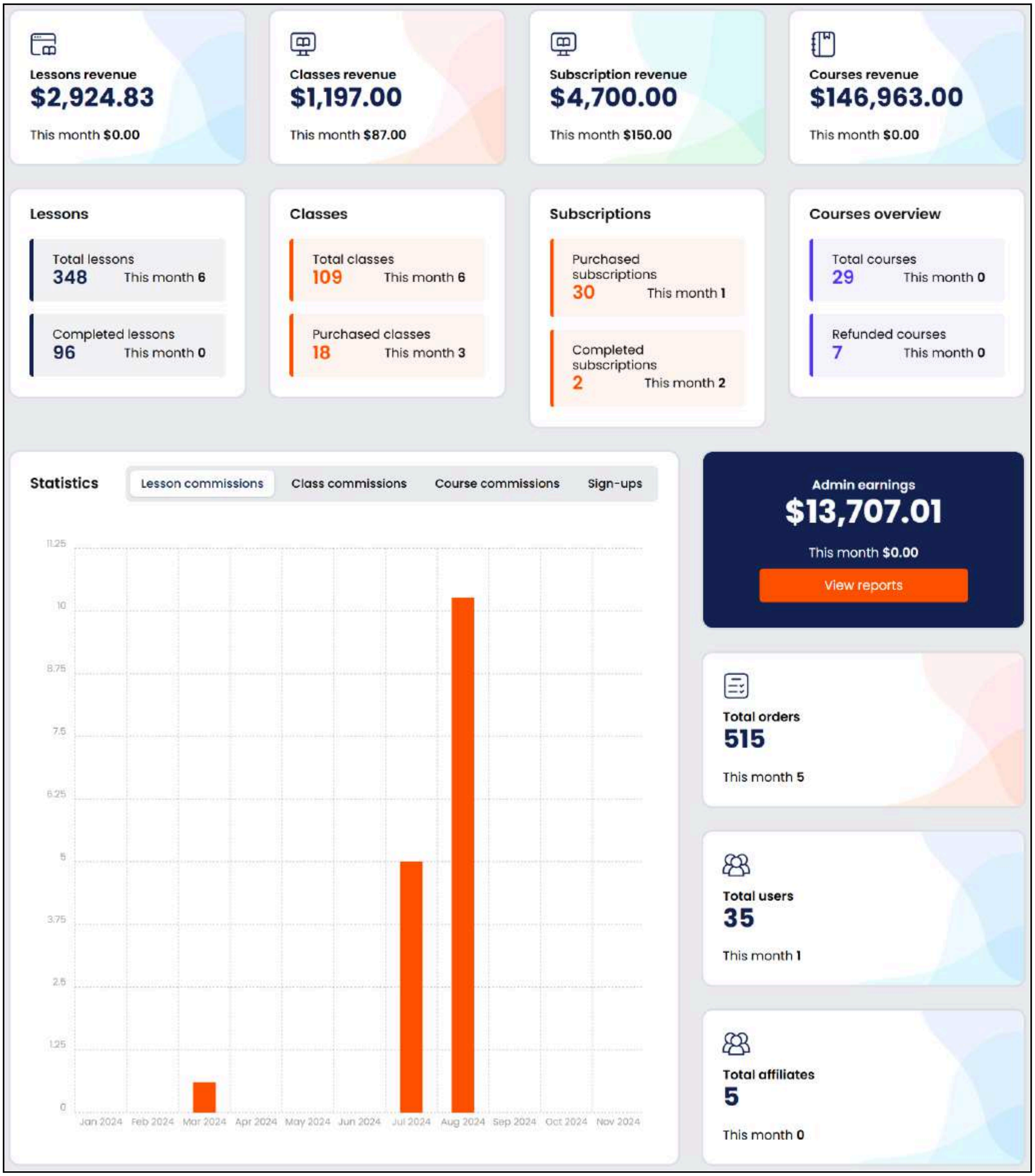
The dashboard displays various sections that provide an overview of your system's reports and statistics.

These sections offer key insights into the performance of your portal, using charts, graphs, and widgets to simplify complex data.

2.3.1 Summary reports

The dashboard features multiple small widgets that summarize the platform's performance to date and for the current month.

There are 8 widgets at the top and 4 on the right side of the page.



The top row widgets display:

- **Lessons revenue:** Displays the total revenue generated from standalone, recurring, and subscription lessons to date and for the current month.

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Clicking this widget directs you to the [Lesson orders](#) page.

Only paid lesson orders are considered when calculating lesson revenue.

- **Classes revenue:** Displays the total revenue generated from standalone and package group classes to date and for the current month.

  Clicking this widget directs you to the Group class orders page.

  Only paid group class orders are considered when calculating group class revenue.

- **Subscription revenue:** Displays the total revenue generated from subscription plans sold to learners to date and for the current month.

  Clicking this widget directs you to the Subscription plan orders page.

- **Courses revenue:** Displays the total revenue generated from the sale of pre-recorded courses, including revenue from canceled courses, to date and for the current month.

  Clicking this widget directs you to the Course orders page.

  *This section is visible only if the **Courses module** is activated under **Settings > System configurations >** System tab.*

The widgets in the second row display:

- **Lessons:** This section displays two reports: the total lessons purchased by all the learners to date and in this month, and the total lessons completed by teachers and learners to date and in this month.

  Clicking **Total lessons** opens the Lesson orders page, showing all purchased lessons, regardless of status.

  And clicking **Completed lessons** opens the Lesson orders page, showing all completed lesson orders.

- **Classes:** This section displays two reports: the total classes created by teachers to date and in this month, and the total classes purchased by learners to date and in this month.

  Clicking **Total classes** opens the Group classes page, showing all group classes created to date, regardless of status.

  And clicking **Purchased classes** opens the Group class orders page, showing all purchased class orders.

- **Subscriptions:** This section displays two reports: the total subscriptions purchased to date and in this month, and the total subscriptions completed to date and in this month.

  Clicking **Purchased subscriptions** opens the Subscription plan orders page, showing all subscription plans purchased to date.

  And clicking **Completed subscriptions** opens the Subscription plan orders page, showing all completed subscription plans.

- **Courses overview:** This section displays two reports: the total courses created by teachers to date and in this month, and the total course orders canceled by learners to date and in this month.

  Clicking **Total courses** opens the All courses page, showing all courses created by teachers on the platform.

  And clicking **Refunded courses** opens the Course refund requests page, showing all refund requests for course orders placed by learners.

  *This section is visible only if the **Courses module** is activated under **Settings > System configurations >** System **tab**.*

The widgets on the right-side display:

- **Admin earnings:** This section displays the total admin earnings from the platform, including commissions from completed lessons, classes, and sold courses purchased by learners, excluding any discounts applied to orders.

  It also highlights the earnings for the current month.

Click **View report** to access the [Admin earnings report]() page for a detailed breakdown.

- **Total orders:** This section displays the total number of orders received on the platform, including lessons, classes, courses, wallet recharge orders, subscription orders and gift card orders placed by users.

  It also displays the number of orders placed in the current month.

Click this section to open the [All orders]() page for a detailed breakdown.

- **Total users:** This section displays the total number of users registered on the platform, including learners, teachers, and affiliates.

  It also displays the number of users registered in the current month.

Click this section to open the Platform users page.

- **Total affiliates:** This section displays the total number of affiliates registered on the platform.

  It also displays the number of affiliates that registered in the current month.

  Click this section to open the **Platform users** page, which lists all the platform affiliates.

2.3.2 Statistics

The **Statistics** section includes a bar graph widget located at the top center of the page.

This widget provides an overview of the platform's performance for the past 11 months and the current month, allowing you to analyze trends and patterns.

The widget is divided into four tabs, each highlighting a specific parameter. The default view displays the **Lessons commission** statistics graph.

Use the tabs to explore detailed monthly data for each parameter, as explained in the following sections:

a. Lesson commissions

The **Lesson commission** bar graph displays the earnings generated from lessons over the past several months.

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Each bar represents the total commission for a specific month, allowing you to track monthly fluctuations, and identify trends in lesson performance.

Negative values occur when the admin's commission for a particular month is smaller than the total amount of discounts or refunds issued. In other words, it indicates that the admin lost more than they earned during that month.

b. Class commissions

The **Class commission** bar graph provides the admin's monthly earnings from classes.

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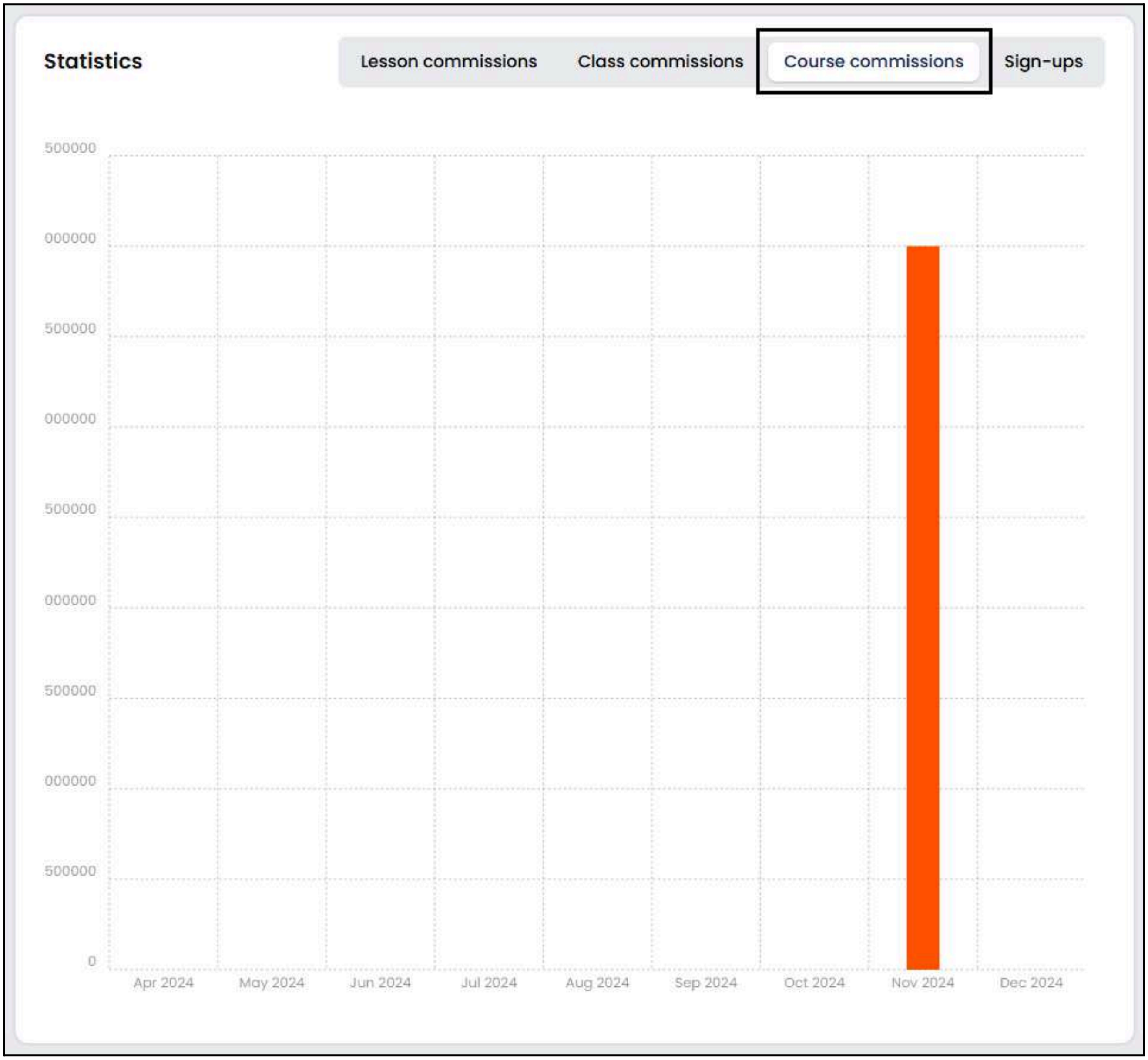
Use it to analyze class revenue patterns and assess their contribution to overall earnings.

Negative values occur when the admin's commission for a particular month is smaller than the total amount of discounts or refunds issued. In other words, it indicates that the admin lost more than they earned during that month.

c. Course commissions

*This bar chart tab will only be visible if the **Courses module** is activated in **Settings > System configurations >** [System](#) tab.*

The **Courses commission** bar graph displays monthly commission earned from courses.

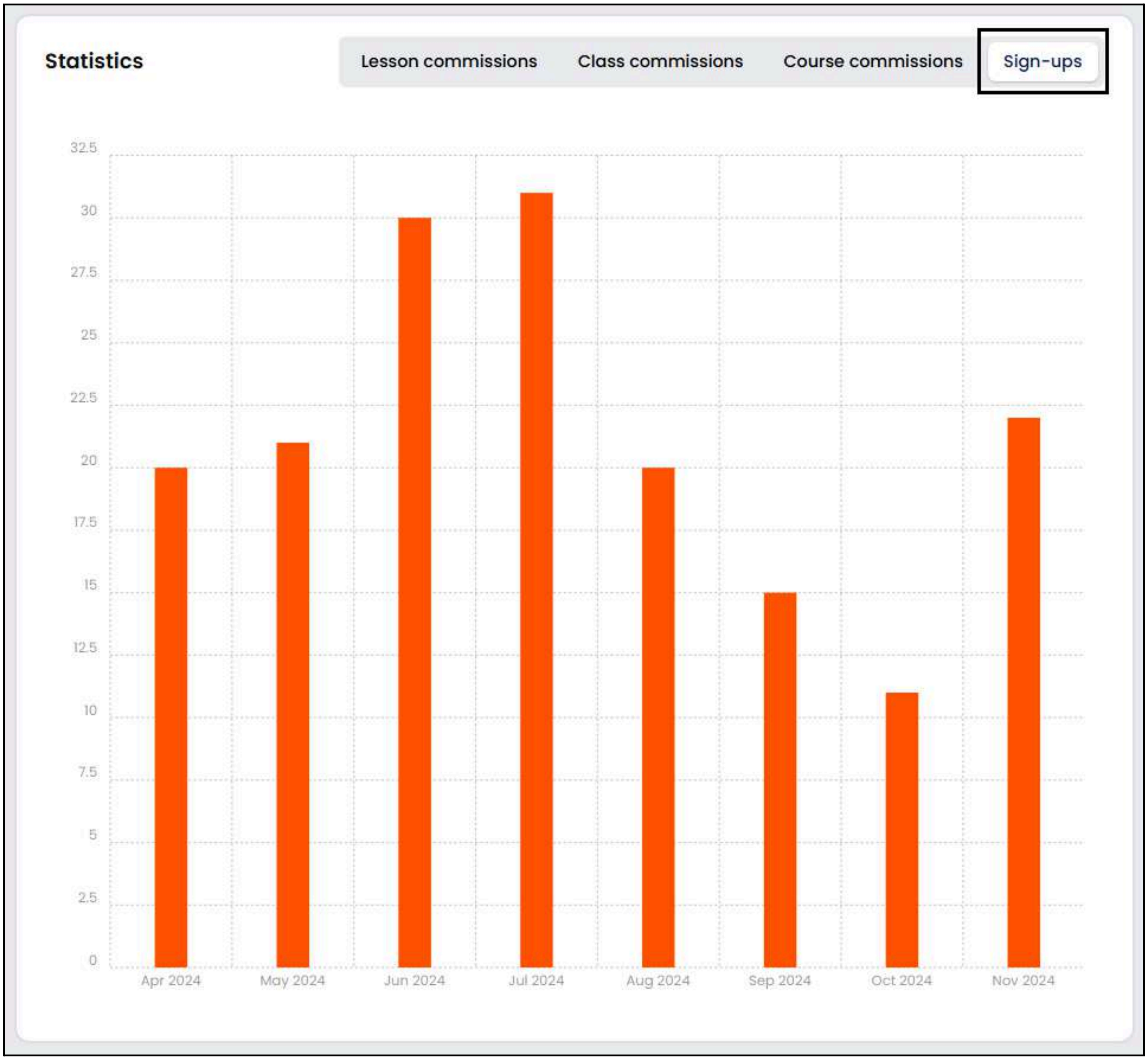


It helps track trends in course revenue and evaluate their contribution to overall growth.

Negative values occur when the admin's commission for a particular month is smaller than the total amount of discounts or refunds issued. In other words, it indicates that the admin lost more than they earned during that month.

d. Sign-ups

The **Sign-up** bar chart displays the number of new registrations on the platform, including teachers, learners, and affiliates.



Use this chart to track sign-up trends and monitor the growth of all user groups over time.

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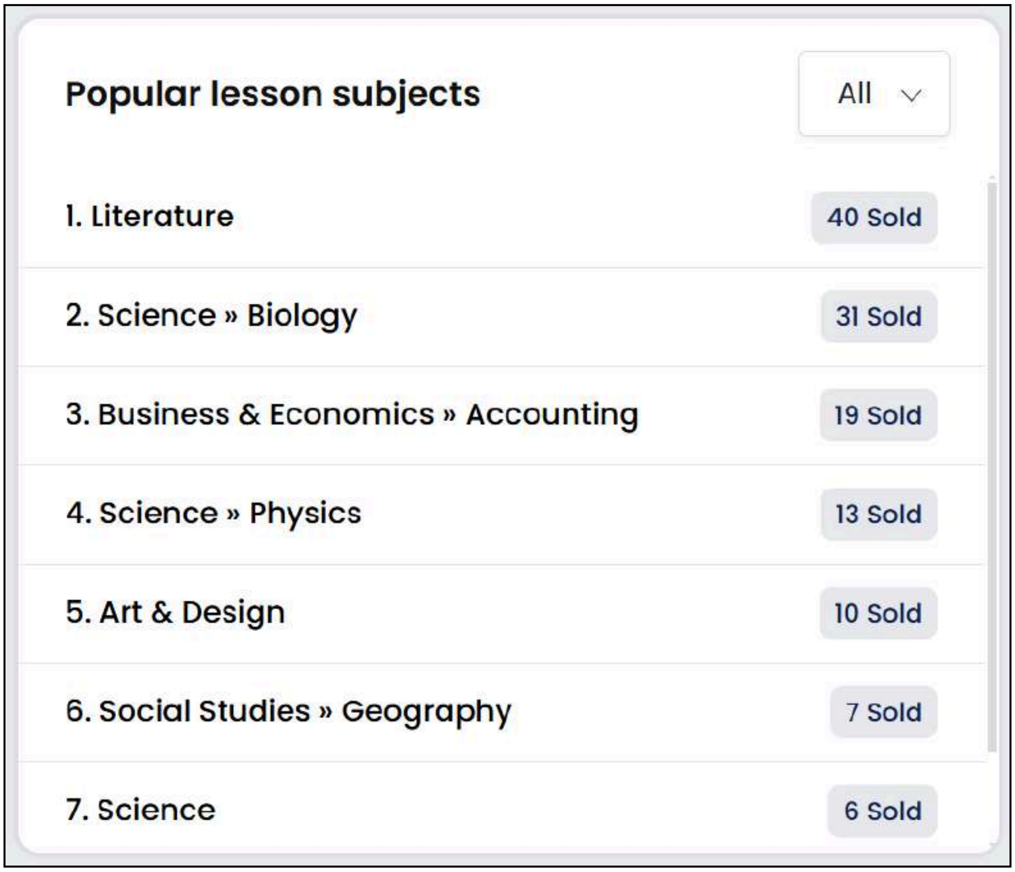
2.3.3 Popular lesson subjects

This widget displays a list of popular lesson subjects and the number of lessons sold for each subject.



By default, this widget displays the most popular lesson subjects since the platform's inception.

To view data for a specific time period, click 

in the upper right corner of the widget and select from options such as today, this week, last week, this month, last month, this year, last year, last 12 months, or all.

2.3.4 Popular class subjects

This widget displays the most popular class subjects along with the number of classes sold for each.

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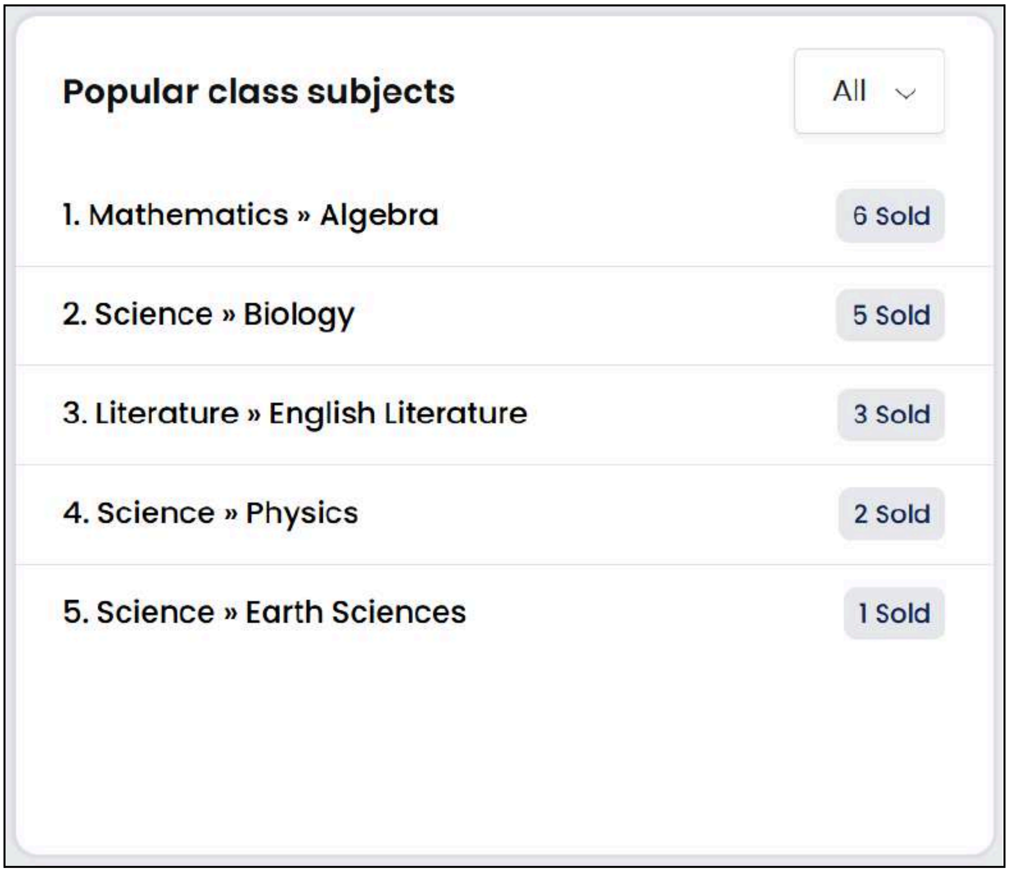


By default, this widget displays the most popular class subjects since the platform's inception.

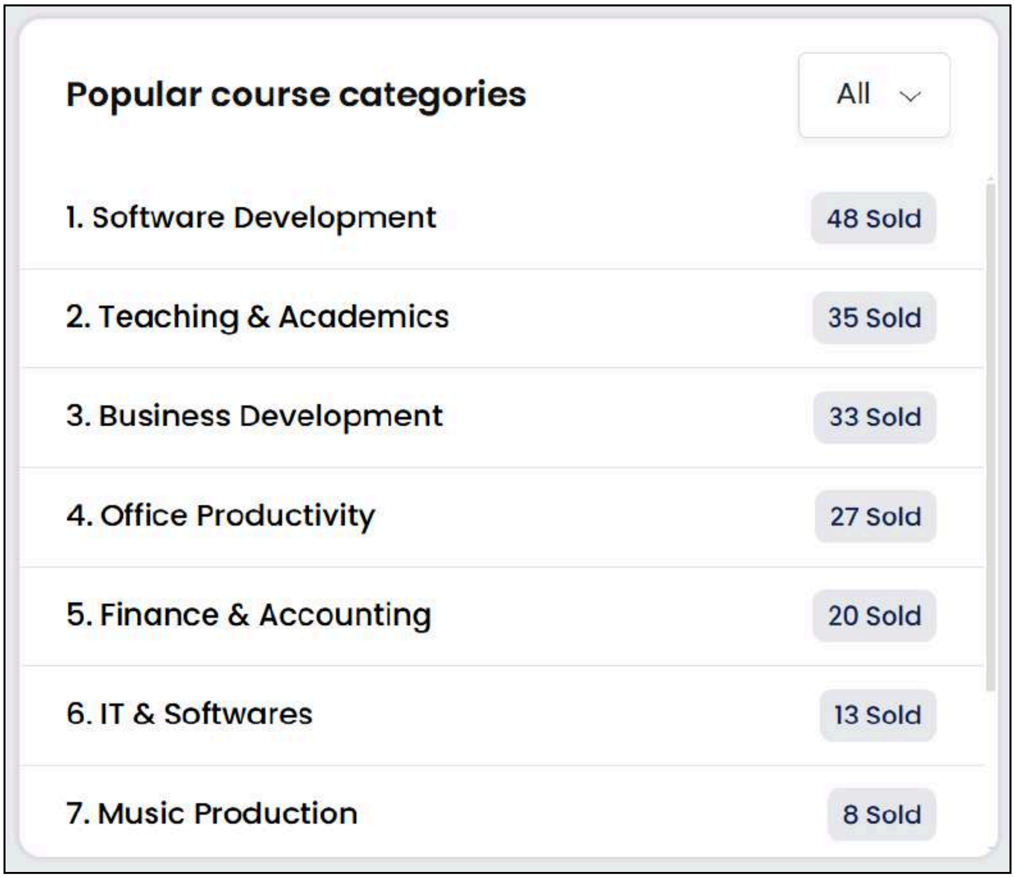
To view data for a specific time period, click 

in the upper right corner of the widget and select from options such as today, this week, last week, this month, last month, this year, last year, last 12 months, or all.

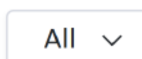
2.3.5 Popular course categories

*This widget will only be visible if the **Courses module** has been activated in **Settings > System configurations > [System](#) tab.***

This widget displays the most popular course categories and the number of courses sold in each category.



By default, this widget displays the most popular course categories since the platform's inception.

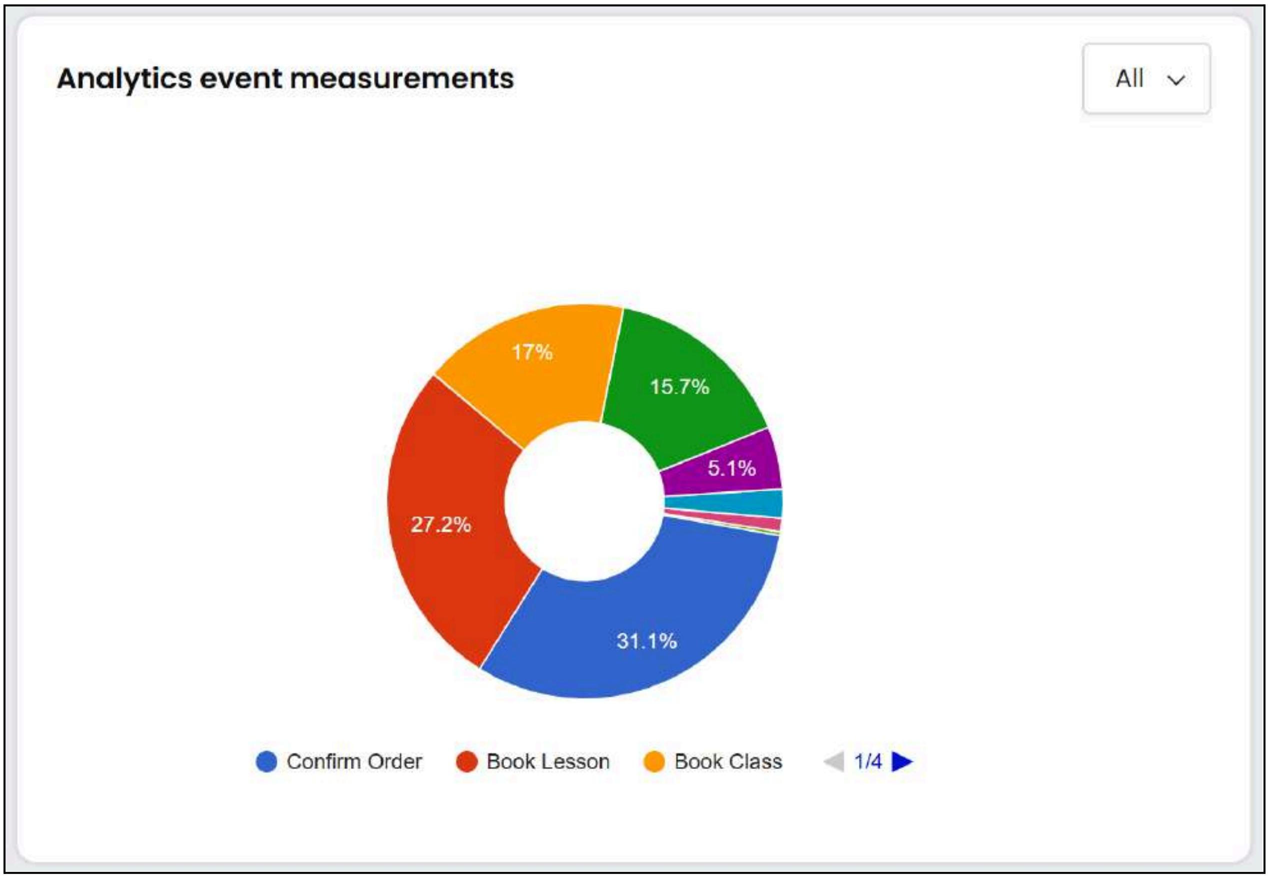
To view data for a specific time period, click 

in the upper right corner of the widget and select from options such as today, this week, last week, this month, last month, this year, last year, last 12 months, or all.

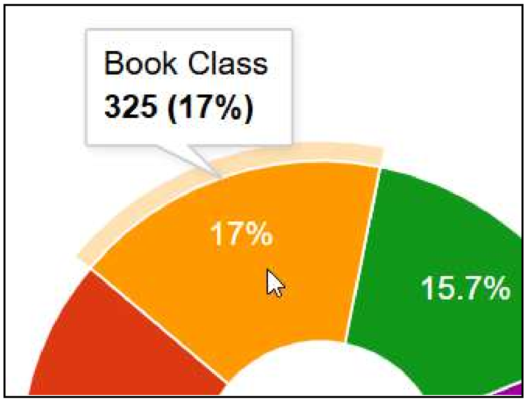
2.3.6 Analytics event measurements

This analytical widget displays data in a pie chart, sourced from Google Analytics, displaying the number of users who have performed specific actions (events) on the platform.

These actions include booking a class, booking a lesson, confirming an order, booking a trial lesson, booking a course, booking a trial course, booking a subscription plan, and visiting the platform for the first time.



Hover over any segment of the pie chart to see more details about each event.



It will display the total number of users who performed the action, the percentage of users who took that action compared to all the other actions, and the name of the action.

By default, the widget displays the event data since the platform's inception. To view data for a specific time period, click 

in the upper right corner of

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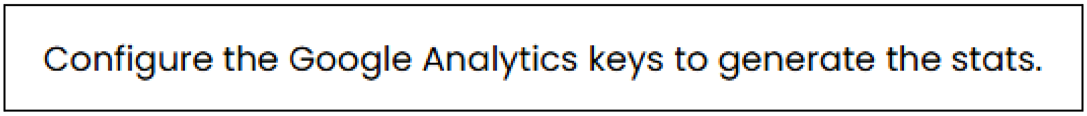
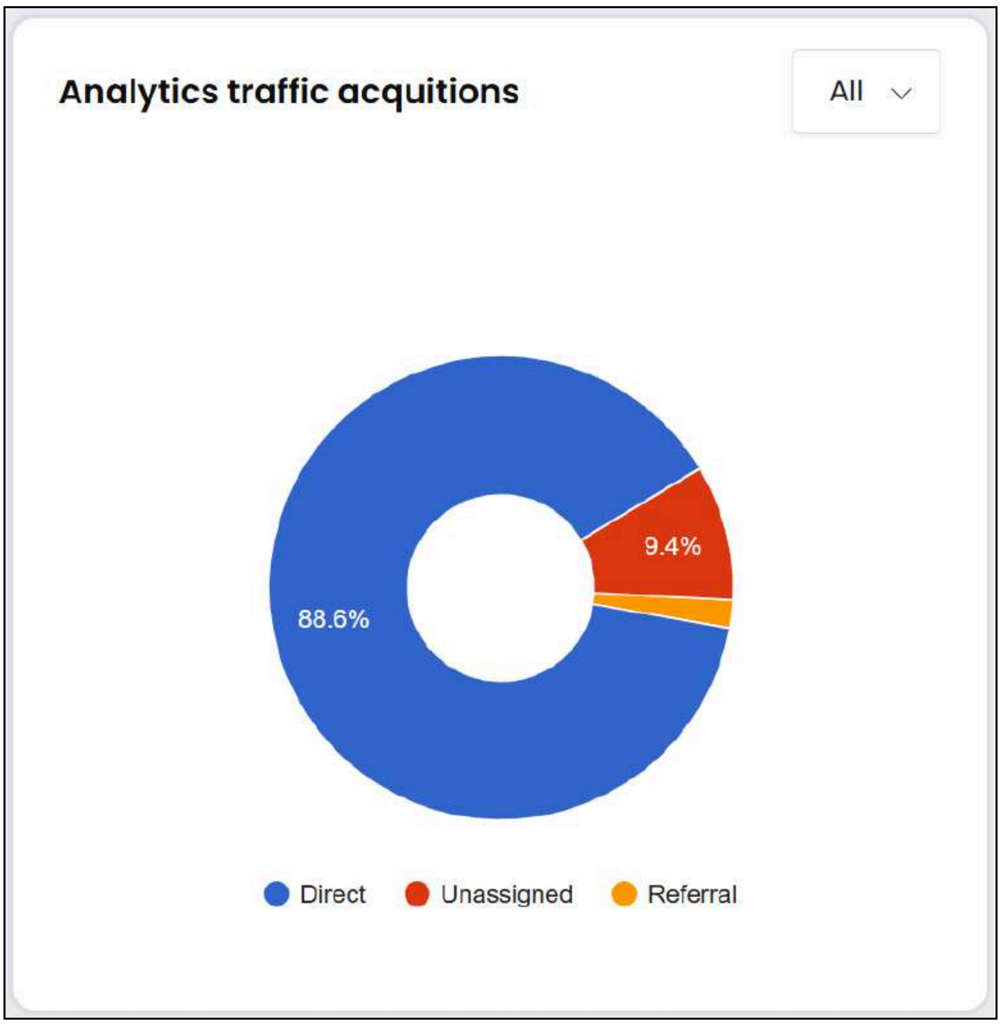
the widget and select from options such as today, this week, last week, this month, last month, this year, last year, last 12 months, or all.

*This widget will only be visible once you have configured [Google Analytics](#) under **Settings > System configurations** > [Third-party APIs](#) **tab**. Else, it will display an error message as follows.*

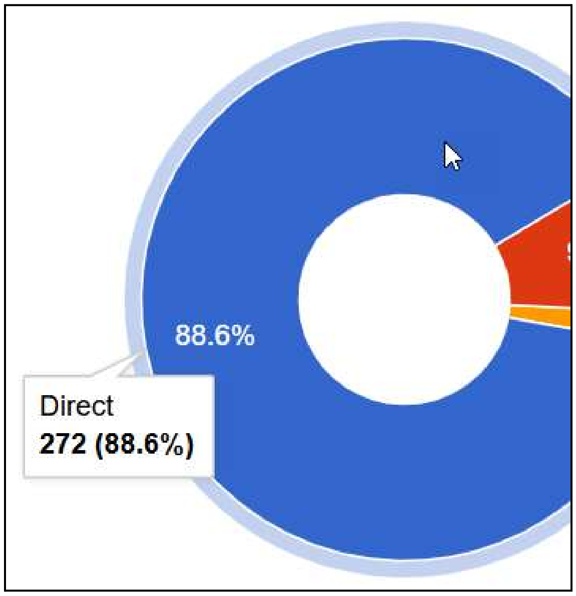


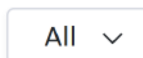
2.3.7 Analytics event measurements

This widget displays the overall traffic generated from various sources in a pie chart format.



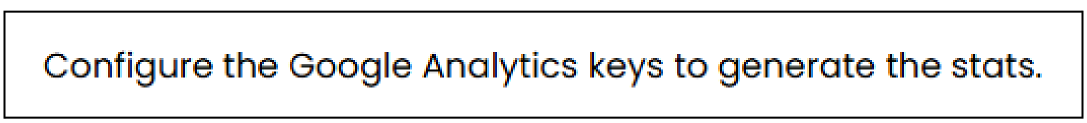
Hover over any section of the pie chart to see more details about each traffic source, including the total number of users from that source, the percentage of total traffic it represents, and the name of the source.



By default, this widget displays traffic data since the platform's inception. To view data for a specific time period, click 

in the upper right corner of the widget and select from options such as today, this week, last week, this month, last month, this year, last year, last 12 months, or all.

*This widget will only be visible once you have configured [Google Analytics](#) under **Settings > System configurations >** [Third-party APIs](#) **tab**. Else, it will display an error message as follows.*



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3. Users

The platform allows users to create accounts based on their role. After joining, users can log in and access their dashboard, where they can manage various features specific to their user type.

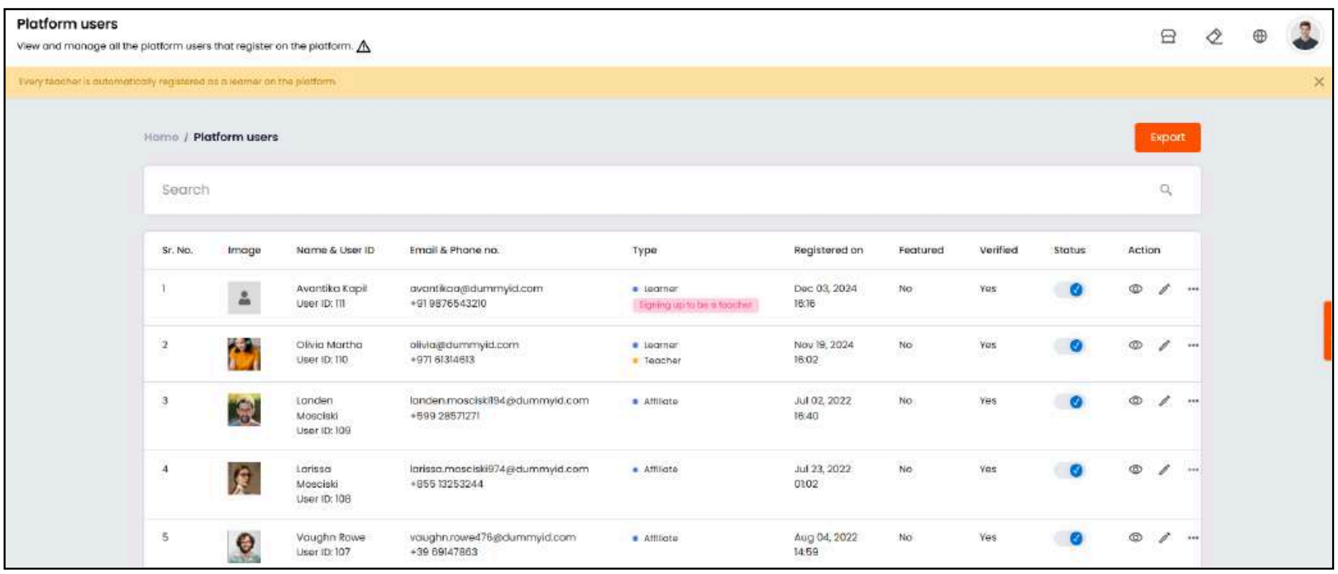
This module enables you to manage users, their permissions, review and manage wallet transactions, handle teacher requests, and more.

Expand this module to view its submodules. Click on any submodule to visit its respective page.

Each submodule is explained in detail.

3.1 Platform users

This sub-module provides a list of all the users who have registered on the platform.



The list will be empty if you just bought the platform and didn't choose to have dummy content provided by FATbit during the platform installation.

The platform has the following user types:

- Teachers
- Learners

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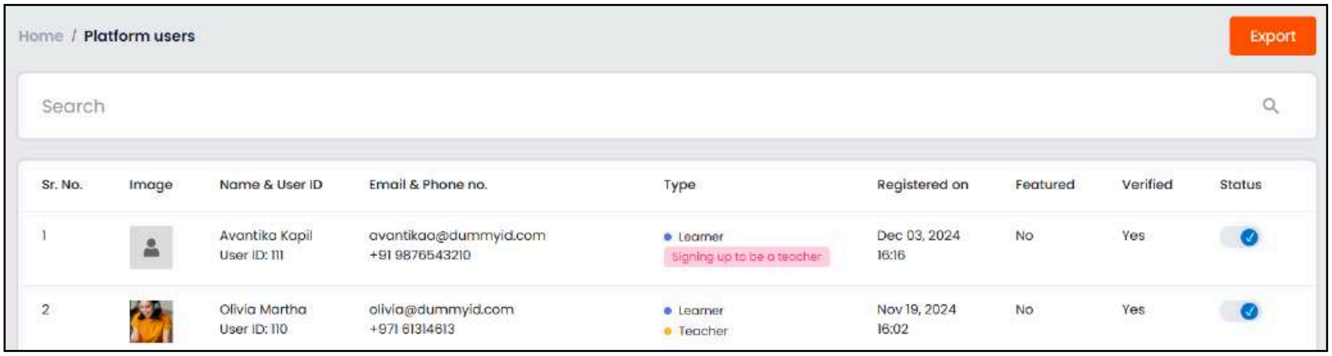
- Affiliates

Every user who joins as a teacher, is automatically registered as a learner on the platform.

Manage platform users list



The list displays the following details for each user profile:

- **Sr. No.:** Serial number
- **Image:** The user's profile picture.
- **Name & User ID:** The name and unique user ID.
- **Email & Phone no.:** The registered email address and phone number.
- **Type:** This indicates how users are categorized on the platform based on specific criteria.

  The users are classified into three types: teachers, learners, and affiliates.

  Teachers can become learners, and learners can become teachers on the platform. In such cases, both user types will be listed under this column for the respective user.

- **Registered on:** The date and time when the user registered on the platform.
- **Featured:** This defines if the user is marked as a featured user. "**Yes**" implies the teacher is featured, while "**No**" indicates they are not.

  This applies only to teachers. You (the admin) must mark a teacher as featured using the edit action button after the teacher joins the platform. A featured teacher will be displayed as a top teacher on the portal's home page.

  *All other users automatically receive the value "**No**" in this column.*

- **Verified:** This defines if the user has completed their email verification process or not. "**Yes**" indicates the user has completed the email verification process, while "**No**" means they have not.

  > *Define whether users are required to verify their email after registration or not under **Settings > System configurations > System tab**.*

  Upon registration, users are required to verify their email address. They will receive an email with a verification link.

  Once they click the link and complete the verification process, their verification status will be updated to "**Yes**."

- **Status:** Edit the status (activate or deactivate) of a user's profile as per your requirements using the toggle switch beside it, under the status column.

  Turn **on** the toggle switch beside the user's profile to activate it.

  Leave this **off** or turn it **off** to deactivate the user's profile account. When you deactivate a user's account, they will no longer be able to log in or access their account on the portal.

  > *You can define the setting (under **Settings > System configurations > System tab**) to automatically mark a user's profile as inactive upon registration, allowing you to review and activate it as needed.*
  >
  > *In this case, users will only be able to access their profiles once the admin marks their profile as active.*

Action buttons

Under the **Action** column, each entry has three buttons, each offering specific functionality.

The function of each button is described in detail below.

i. View

Click the button beside a user profile.

A drawer will appear displaying the **User details** including their name, email address, timezone, registration date, phone number, country, and biography.

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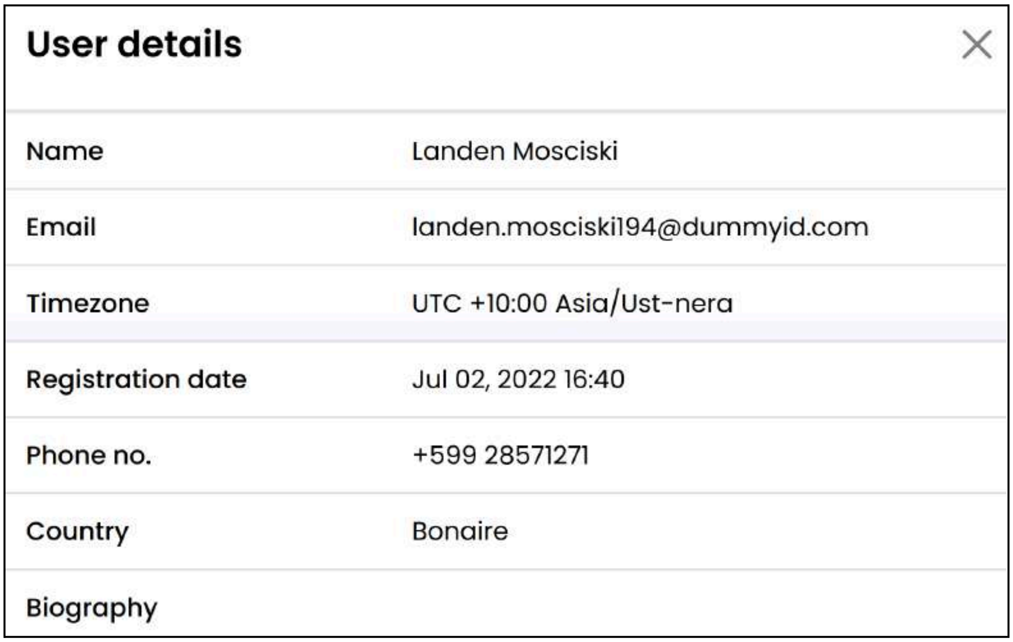
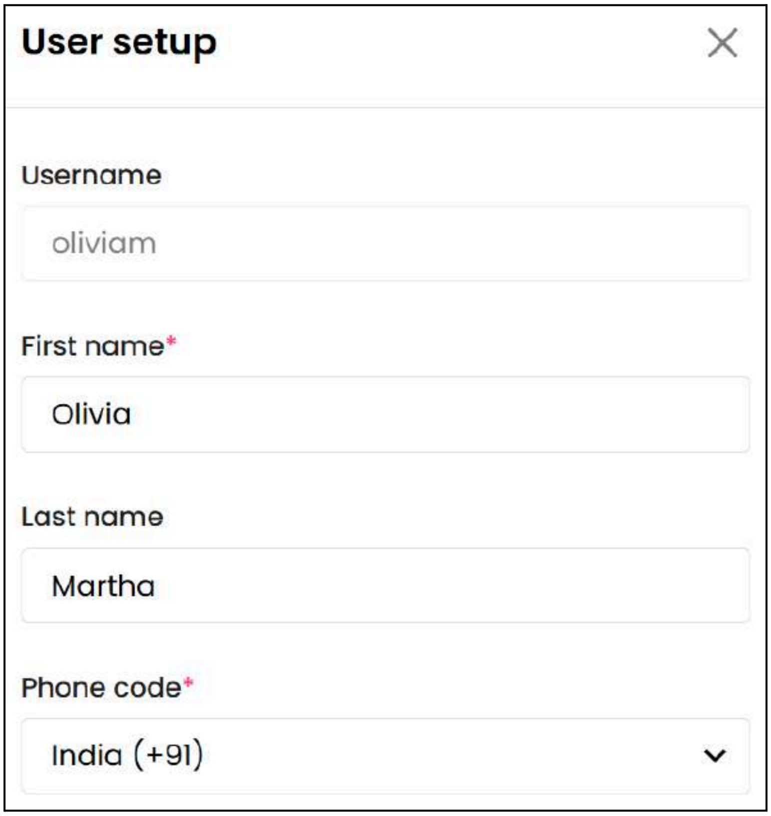
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.



ii. Edit

Click this button to edit the user's details. The **User setup** form will appear.



DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
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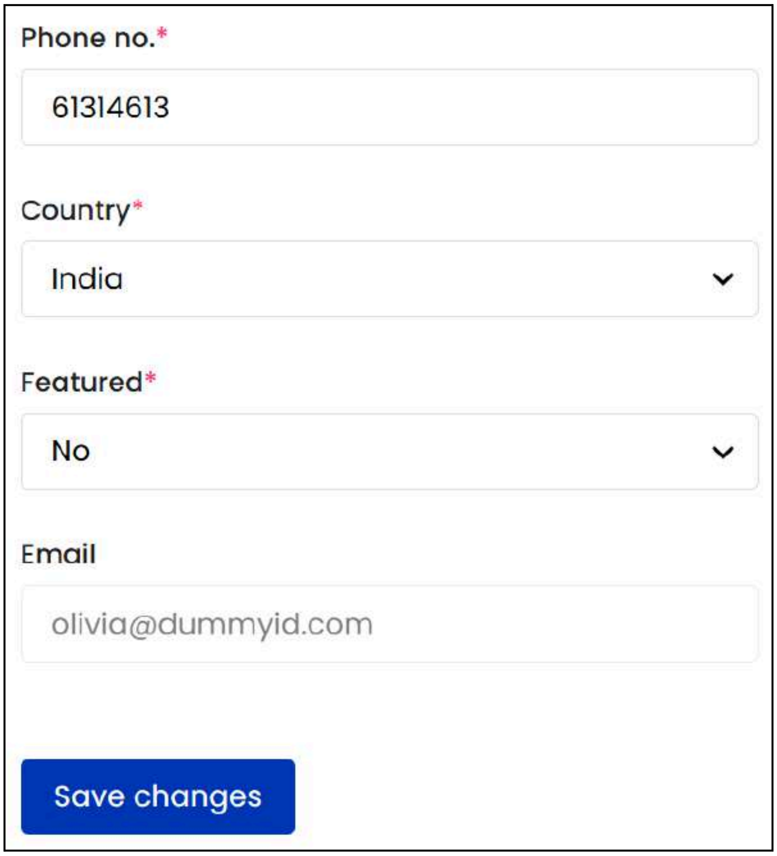
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

Review & update the following:

- **Username:** This is the user's username, and it cannot be edited.
- **First name*:** Review and edit the user's first name.
- **Last name:** Review and edit the user's last name.
- **Phone code*:** Review and edit the user's phone code.

Scroll down to view and edit the next set of fields:



- **Phone*:** Review and edit the user's phone number.
- **Featured*:** Define if this teacher will be featured on the portal's home page under the top teachers section.

  To do this, click the field, and select "**Yes**" to mark the teacher as featured, or leave the default setting of "**No**" if you do not wish to feature the teacher.

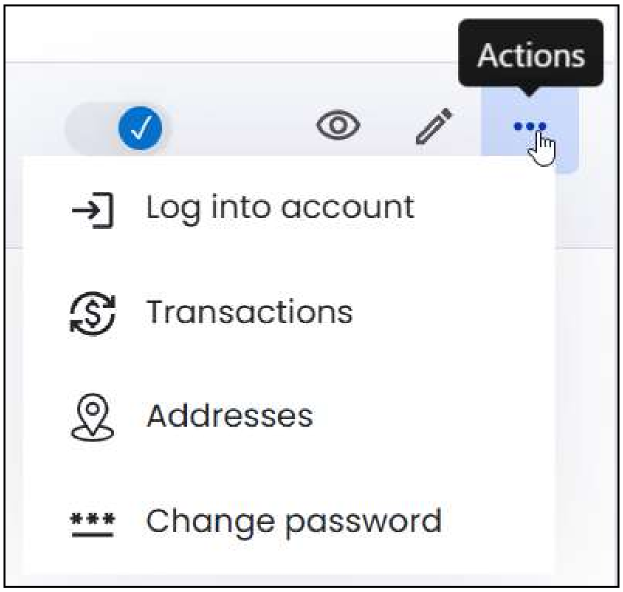
  This field is only visible to users registered as teachers and is available exclusively to you as the admin, allowing you to decide if a teacher should be marked as featured.

- **Email:** This is the email address the user used to register on the platform, and it cannot be edited.

After reviewing and/or updating the details, click **Save changes.**

iii. Actions ●●●

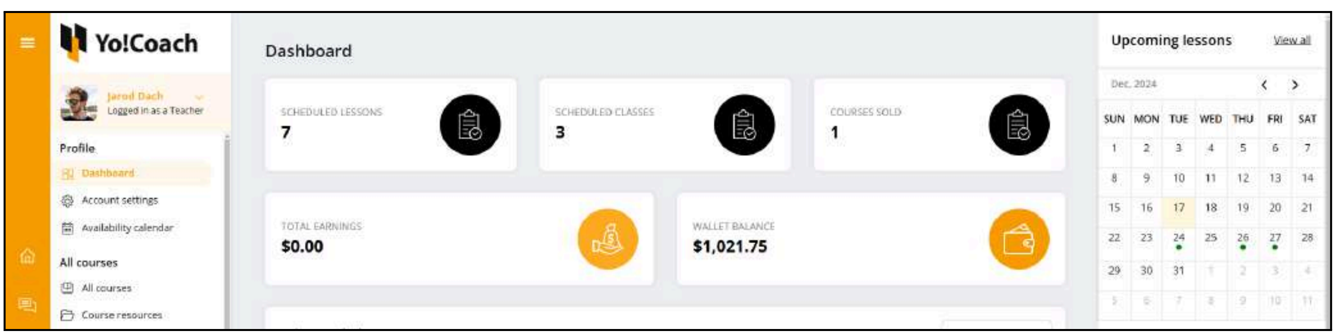
Click this button to perform additional actions on the user's profile. A menu with options will appear:



Each option is explained in detail below:

a. Log into account

Click this to log in to the respective user's account in a new tab.



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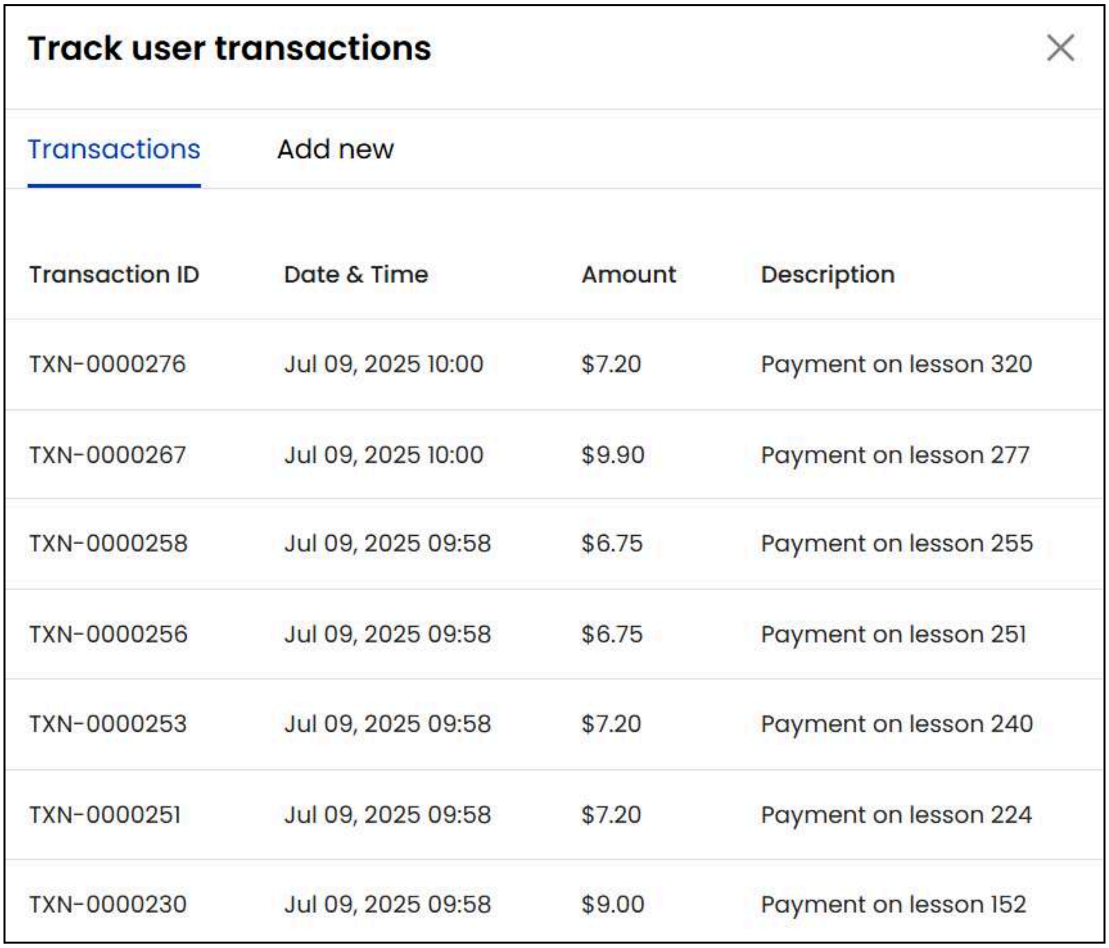
Perform actions in the account as the user.

b. Transactions

Click this to track and manage the respective user's wallet transactions.

The **Track user transactions** drawer appears, displaying two tabs.



Transaction ID	Date & Time	Amount	Description
TXN-0000276	Jul 09, 2025 10:00	$7.20	Payment on lesson 320
TXN-0000267	Jul 09, 2025 10:00	$9.90	Payment on lesson 277
TXN-0000258	Jul 09, 2025 09:58	$6.75	Payment on lesson 255
TXN-0000256	Jul 09, 2025 09:58	$6.75	Payment on lesson 251
TXN-0000253	Jul 09, 2025 09:58	$7.20	Payment on lesson 240
TXN-0000251	Jul 09, 2025 09:58	$7.20	Payment on lesson 224
TXN-0000230	Jul 09, 2025 09:58	$9.00	Payment on lesson 152

Transactions tab

This tab shows a list of all transactions in the user's wallet. The list will be empty if the user has just joined the platform.

The list includes the following details:

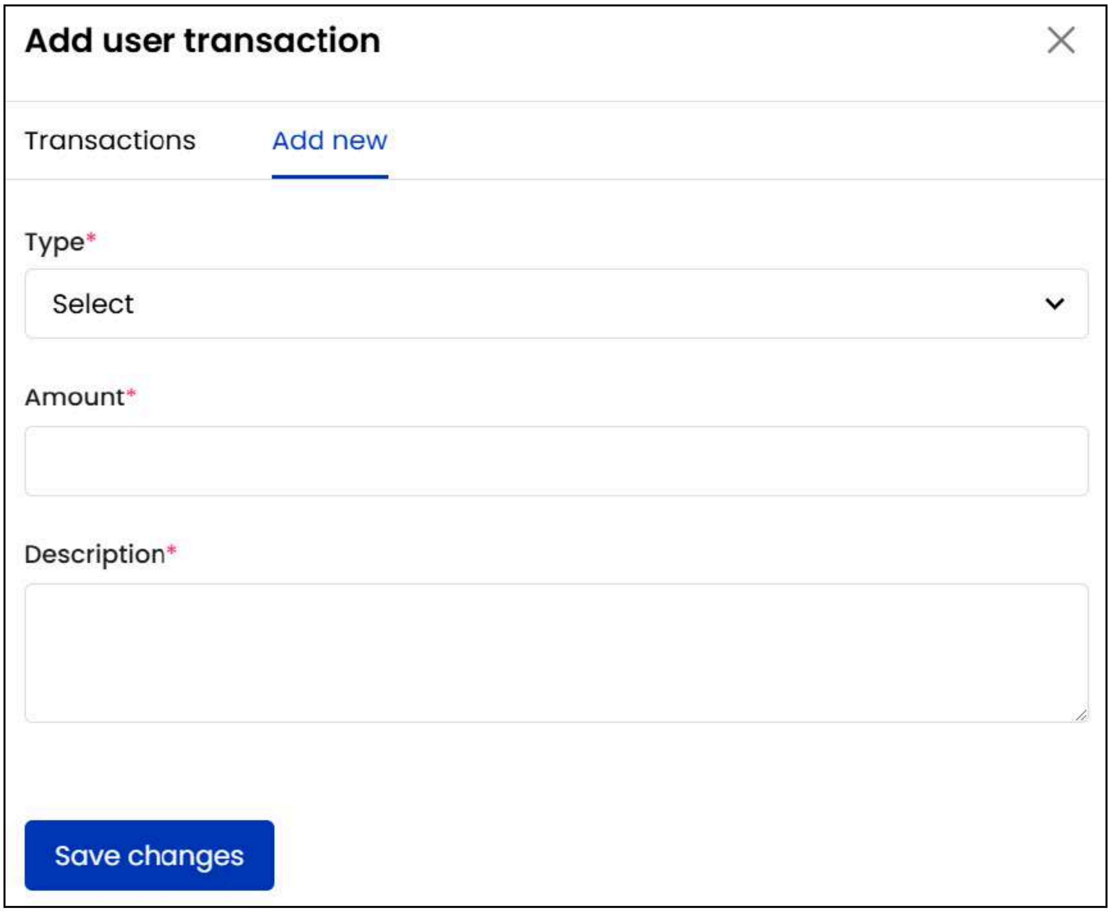
- **Transaction ID:** The system-generated transaction ID.

- **Date & Time:** The date and time of the transaction.
- **Amount:** The amount credited or debited from the user's wallet. Credited amounts appear as positive values, and debited amounts appear as negative values.
- **Comments:** Notes related to the transaction.
    - For system-generated transactions, such as wallet deductions for subscription payments, the system automatically adds a comment specifying where the amount was used.
    - For admin-created transactions, the comments entered by you while creating the transaction records are displayed. Use the [Add new tab](#) to create new transactions.

Add new tab

To add a transaction for the respective user, click this tab.

The **Add user transaction** form opens.



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Update the following fields:

- **Type*:** Select the transaction type from the dropdown list:
    - **Debit:** Choose this to remove an amount from the wallet.
    - **Credit:**Choose this to add an amount to the wallet.
- **Amount*:** Enter the transaction amount.
- **Description*:** Enter comments describing the transaction.

Click **Save changes** to add the transaction to the list.

You will then be redirected to the **Transactions** tab where you will be able to see the transaction you created in the list.

c. Addresses

Click this to review all addresses added by the user.

The **User's address(es)** drawer opens, displaying all the user's addresses, including the one marked as default.


User's address(es)

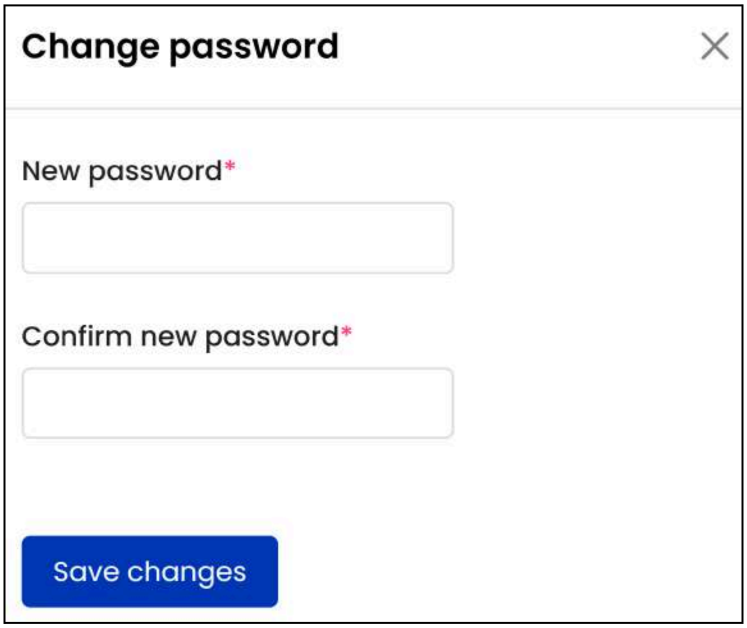
Sr. No	Addresses
1	West 50th Street, Manhattan, New York, New York, 10019, United States of America
2	4928 Astor Pl SE, Washington DC, Washington, 20019, United States of America (Default Address)
3	860 Freeway Dr E, Columbus, Ohio, 43229, United States of America

This section is read-only, allowing you to review the addresses.

Once done, close the drawer by clicking .

d. Change password

Click this and the **Change password** form appears.



Update the following fields:

- **New password:** Enter a strong password with at least 8 characters.

  The password is case-sensitive, meaning "A" and "a" are considered different characters.

  Use a mix of letters and numbers for added security.

- **Confirm new password:** Re-enter the password entered in the previous field.

  If the passwords do not match, an error will appear, and you will not be able to proceed.

Once done, click **Save changes**.

When you change a user's password, they will not receive a notification. Instead, they will see an error message indicating that the password is incorrect when attempting to log in. The user can then reset their password using their email address.

If you no longer want a user to have access to their account, you must deactivate their account. In this case, the user will not be able to recover their account without contacting you.

Search for a platform user

Use the search functionality at the top of the list to find a specific platform user.

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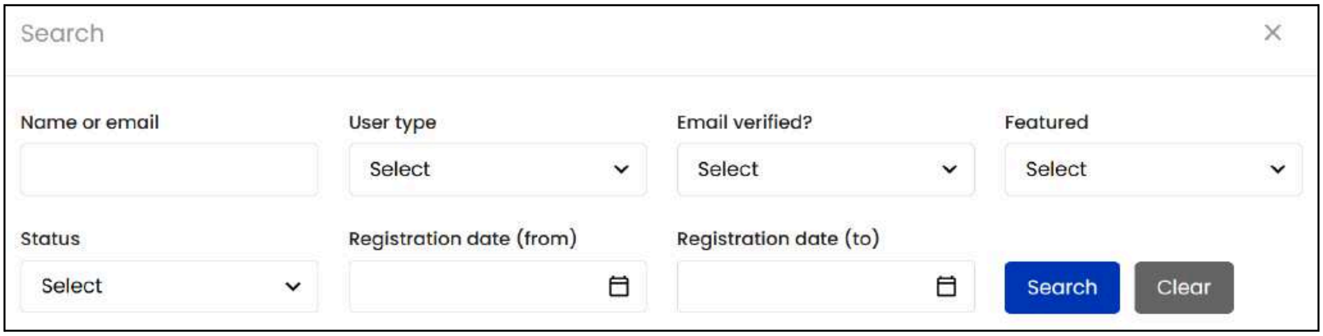
Click the search bar or to expand it. Click or the search bar again to collapse the section.



There are several filters that help narrow down the search. Each field is explained below:

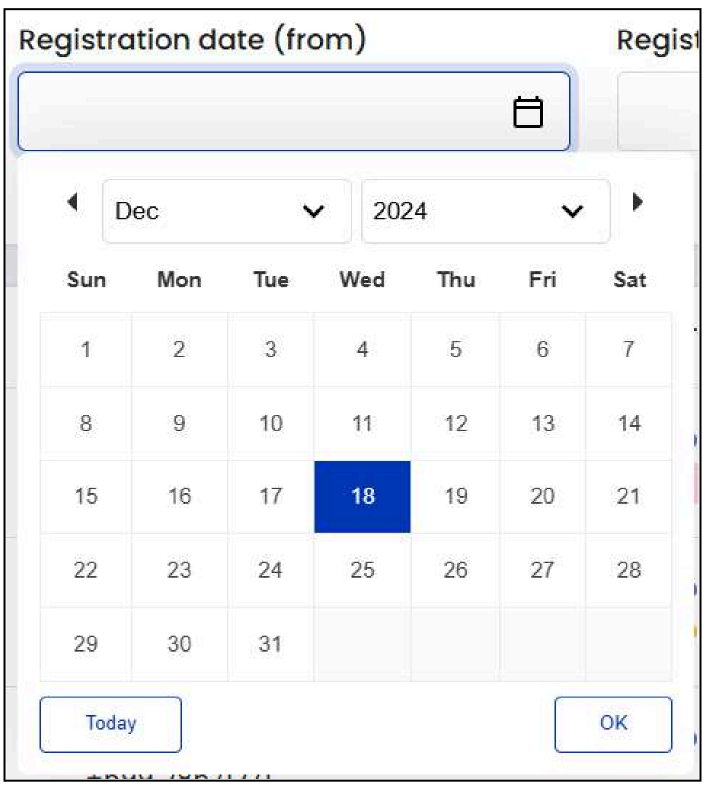
- **Name or email:** Enter the platform user's name or email address in this field. Place the cursor in the field and start typing. As you type, a list of matching results will appear.

Select the applicable option.

- **User type:** Select the user type from the dropdown list of options:
  - Teacher
  - Learner
  - Affiliate

- **Email verified?:** Select whether the user has verified their email address from the dropdown list:
    - **Yes:** Select this if the user has verified their email address.
    - **No:** Select this if the user has not verified their email address yet.
- **Featured:** Select whether the teacher is a featured user from the dropdown list (only teachers can be marked as featured):
    - **Yes:** Select this if the teacher is marked as featured.
    - **No:** Select this if the teacher is not marked as featured.
- **Status:** Select the status of the platform user's profile from the dropdown list:
    - **Active:** Select this if the user's profile is active.
    - **Inactive:** Select this if the user's profile is inactive (applies to users whose accounts have been deactivated by you).
- **Registration date (from):** To view platform users who registered on a specific date, select the desired date in this field.

  To filter users who registered within a date range, select the start date by clicking the field. A calendar will appear; choose the date, and it will be added to the field.



  Use the **Today** button to select today's date and **Ok** to close the calendar.

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- **Registration date (to):** Select the ending date of the range in this field.

*The **Registration date (from)** value must always be an earlier date, and the **Registration date (to)** value must be later than the date selected in the **Registration date (from)** field.*

*For example, if the **Registration date (from)** is 09/24/2020, the **Registration date (to)** must be a date after this, such as 09/25/2020 or any future date. If incorrect dates are entered, no results will be displayed in the list.*

Search for a platform user by filling in a single field or multiple fields. To view users who registered within a specific date range, use the date fields.

After filling in the desired fields, click **Search** to display the results. Click **Clear** to reset all fields and start a new search.

Export platform users data

To export platform users data from this page, click **Export** from the upper-right corner.

The data will be downloaded as a `.csv` file (Comma-Separated Values), which can be used for backups or external purposes.

A success message will appear once the download is complete.

To export specific platform users data, use the [search bar](#) to apply the necessary filters and define the criteria.

After setting the filters and clicking **Search** to view the results, click **Export** to download the filtered data as a `.csv` file.

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3.2 Teacher registration requests

Every user who wants to join the platform as a teacher can submit their registration request via the front-end interface.

The **Teacher registration requests** page displays all such requests submitted by users seeking to join the platform as teachers.

The list will be empty if you just bought the platform and didn't choose to have dummy content provided by FATbit during the platform installation.

Review the details of each request to decide whether to approve or decline it. Requests that are neither approved nor declined will remain in the "pending" status.

Once a teacher's registration request is approved, the user is added to the system as a teacher.

After approval, the registration status cannot be changed. To remove the teacher from the platform, deactivate their account from **Users >** [Platform users].

Similarly, if a teacher's registration request is declined, the status cannot be changed to "Approved."

The user will need to create a new account using a different email address if they want to reapply.

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Manage teacher registration requests list

The list displays the following details for each teacher request:

- **Sr. No.:** Serial number
- **Reference number:** The unique reference number generated with the request.
- **Name:** The name of the user requesting to register as a teacher.
- **Email:** The registered email address of the user.
- **Comments:** The comments provided by the admin, explaining the reason for rejecting the registration request.
- **Requested on:** The date and time when the request was submitted.
- **Status:** This section displays the status of teacher registration requests.

  A new teacher registration request remains in the "**pending**" status until it is reviewed and updated. Requests that are declined will display the status as "**canceled**," while approved requests will display the status as "**approved**."

  Once a request is marked as either "**approved**" or "**canceled**," the status cannot be changed.

Action buttons

Under the **Action** column, each entry displays two or three buttons, depending on its status.

Requests that have not yet been reviewed and their status has not been updated (neither accepted nor canceled) will have three buttons.

Requests with a finalized status—either approved or canceled—will have only two buttons.

The function of each button is described in detail below.

i. View

Click the button beside a teacher registration request to review the details and make your decision accordingly.

A drawer will appear, displaying the details of the teacher registration request.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
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The information is organized into two sections: request information and profile information.

Teacher registration request details

Request information

Reference number	114-1734602302
Requested on	Dec 19, 2024 15:28
Status	Pending

Profile information

Profile picture	
Photo ID	-
First name	Simranjeet
Last name	Singh
Gender	Male
Phone number	+91 7866787600
YouTube video link	
Profile info	
Teaching subject(s)	• Mathematics » Arithmetic & Basic Math • Mathematics » Geometry
Spoken language(s)	English : Advanced

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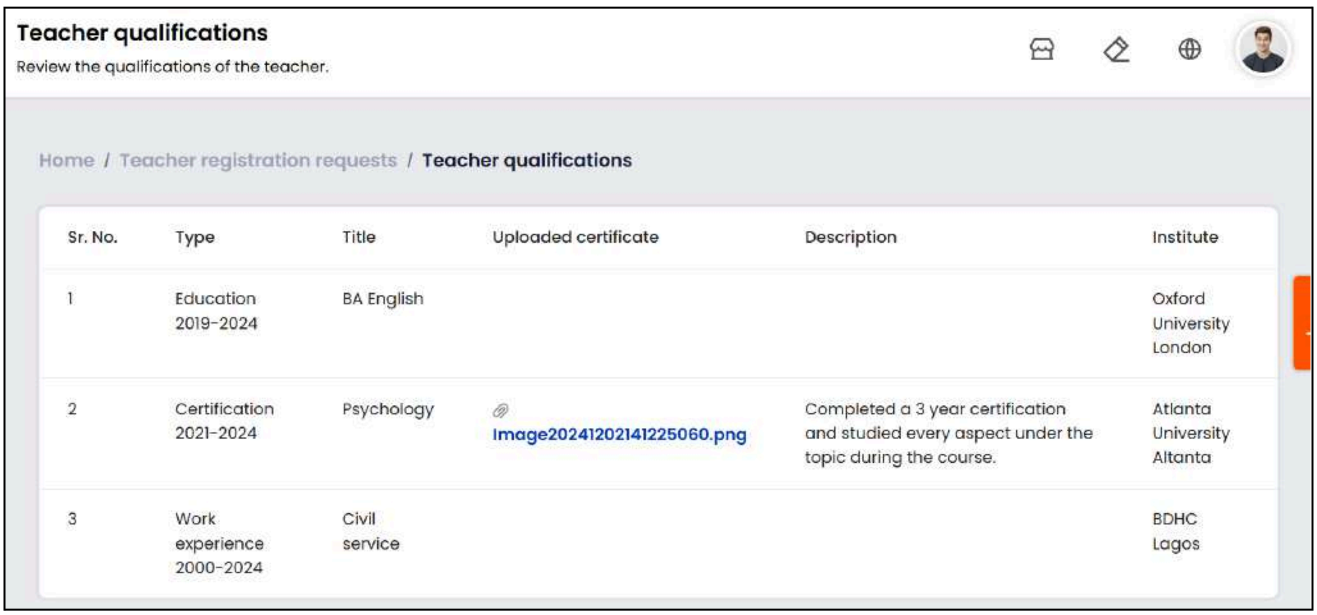
The request information section displays the reference number, the date and time the request was submitted, and its current status.

The profile information section displays the uploaded profile image, photo ID, first name, last name, gender, phone number, YouTube video link, profile info, teaching subject(s), and spoken language(s).

Review the details, then click in the upper-right corner of the drawer to close it.

ii. Teacher qualifications

Click this button to open the **Qualifications** page.



Sr. No.	Type	Title	Uploaded certificate	Description	Institute
1	Education 2019-2024	BA English			Oxford University London
2	Certification 2021-2024	Psychology	Image20241202141225060.png	Completed a 3 year certification and studied every aspect under the topic during the course.	Atlanta University Altanta
3	Work experience 2000-2024	Civil service			BDHC Lagos

This page displays the user's qualifications, work experience, and other relevant details, organized into the following categories:

- **Type:** The category of information, such as education, certification, or work experience. A timeline for the respective information is also displayed below the type name.
- **Title:** The applicable job title, certification name, or education degree.
- **Uploaded certificate:** The uploaded document as proof of the shared information. Examples include a degree or related documents for education, the obtained certificate for certifications, or a work experience letter for job experience.

- **Description:** Any additional information provided by the user about the shared details.
- **Institute name:** The name of the institution associated with the user's education, certification, or work experience.

  The location of the institute is also displayed below its name.

This page is for reviewing details only.

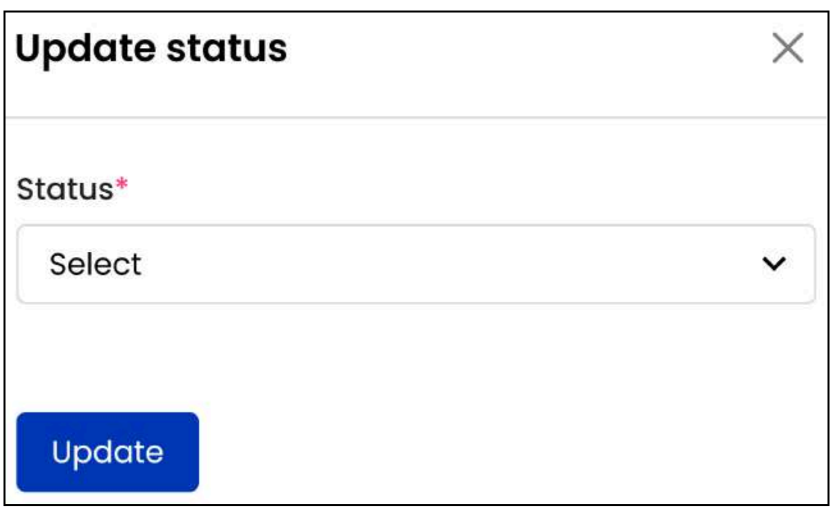
To return to the teacher registration requests page, click **Teacher registration requests** in the breadcrumbs.

iii. Change status

This button is visible only for teacher registration requests with a pending status. It does not appear for requests that have been approved or rejected.

Once a request is approved or rejected, the button disappears, preventing any further changes to your decision.

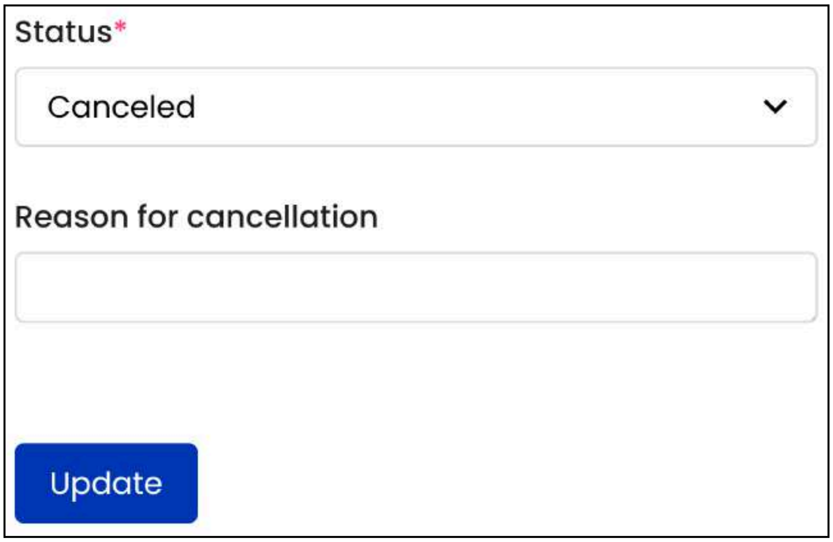
Click the button to open the **Update status** form.



Update the following:

- **Status*:** Use the dropdown list to select the status of the teacher's registration request. The available options are:
    - Approved: Select this option to approve the teacher's registration request.
    - Canceled: Select this option to cancel the teacher's registration request.

If you select **Canceled**, an additional field will appear:



- **Reason for cancellation:** Provide the reason for canceling the teacher's registration request in this field.

After selecting the status, click **Update** to save the changes.

To update the status later, close the form by clicking in the upper-right corner.

Search for a teacher registration request

Use the search functionality at the top of the list to find a specific teacher registration request.

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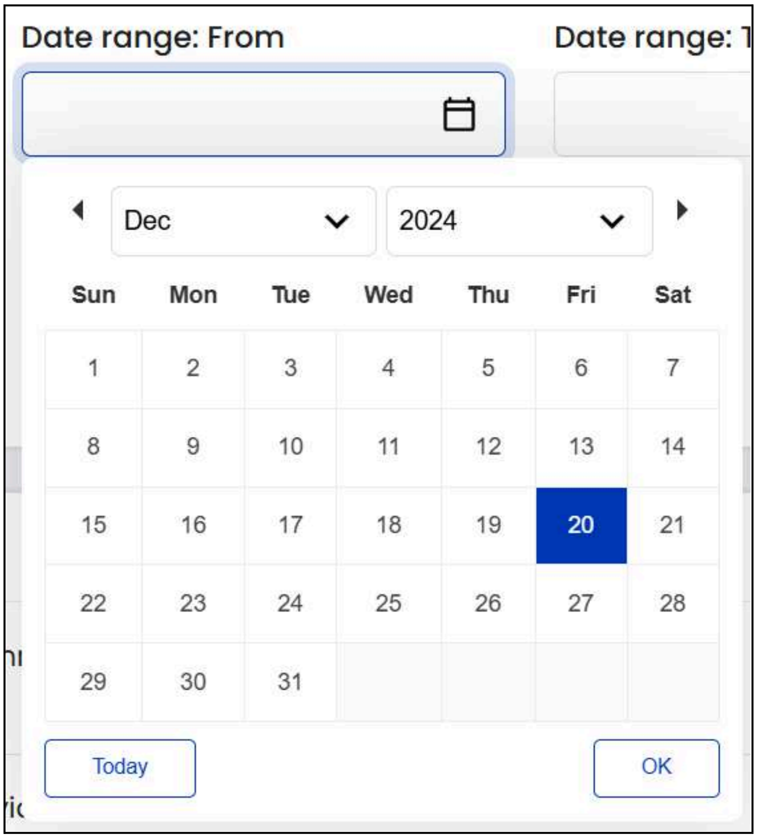
Click the search bar or to expand it. Click or the search bar again to collapse the section.

There are several filters that help narrow down the search. Each field is explained below:

- **Keyword:** Enter the reference number of the teacher registration request or the respective teacher's name or email address in this field.
- **Status:** Select the status of the teacher's registration request from the dropdown list:
  - **All:** Select this option if the status is not a factor.
  - Pending
  - Canceled
  - Approved
- **Date range: From:** To view the teacher registration requests placed on a specific date, select the desired date in this field.

  To filter teacher registration requests placed within a date range, select the start date by clicking the field.

  A calendar will appear; choose the date, and it will be added to the field.



Use the **Today** button to select today's date and **Ok** to close the calendar.

- **Date range: To:** Select the ending date of the range in this field.

*The **Date range: From** value must always be an earlier date, and the **Date range: To** value must be later than the date selected in the **Date range: From** field.*

*For example, if the **Date range: From** is 09/24/2020, the **Date range: To** must be a date after this, such as 09/25/2020 or any future date. If incorrect dates are entered, no results will be displayed in the list.*

Search for a teacher registration request by filling in a single field or multiple fields. To view the teacher registration requests placed within a specific date range, use the date fields.

After filling in the desired fields, click **Search** to display the results. Click **Clear** to reset all fields and start a new search.

Export teacher registration requests data

To export teacher registration requests data from this page, click **Export** from the upper-right corner.

The data will be downloaded as a `.csv` file (Comma-Separated Values), which can be used for backups or external purposes.

A success message will appear once the download is complete.

To export specific teacher registration requests data, use the [search bar] to apply the necessary filters and define the criteria.

After setting the filters and clicking **Search** to view the results, click **Export** to download the filtered data as a `.csv` file.

3.3 Wallet withdrawal requests

Yo!Coach provides virtual wallets for all users, including teachers, learners, and affiliates. These wallets are essential for earning or making purchases on the platform.

Each user has a wallet that enables them to:

- Purchase courses, lessons, classes, and subscriptions
- Manage refund requests
- Handle recurring payments
- Earn by referring others to the platform or selling services

The wallet serves only as a transaction record. The actual funds are stored in the admin's account, which is linked to the platform.

Here's how it works:

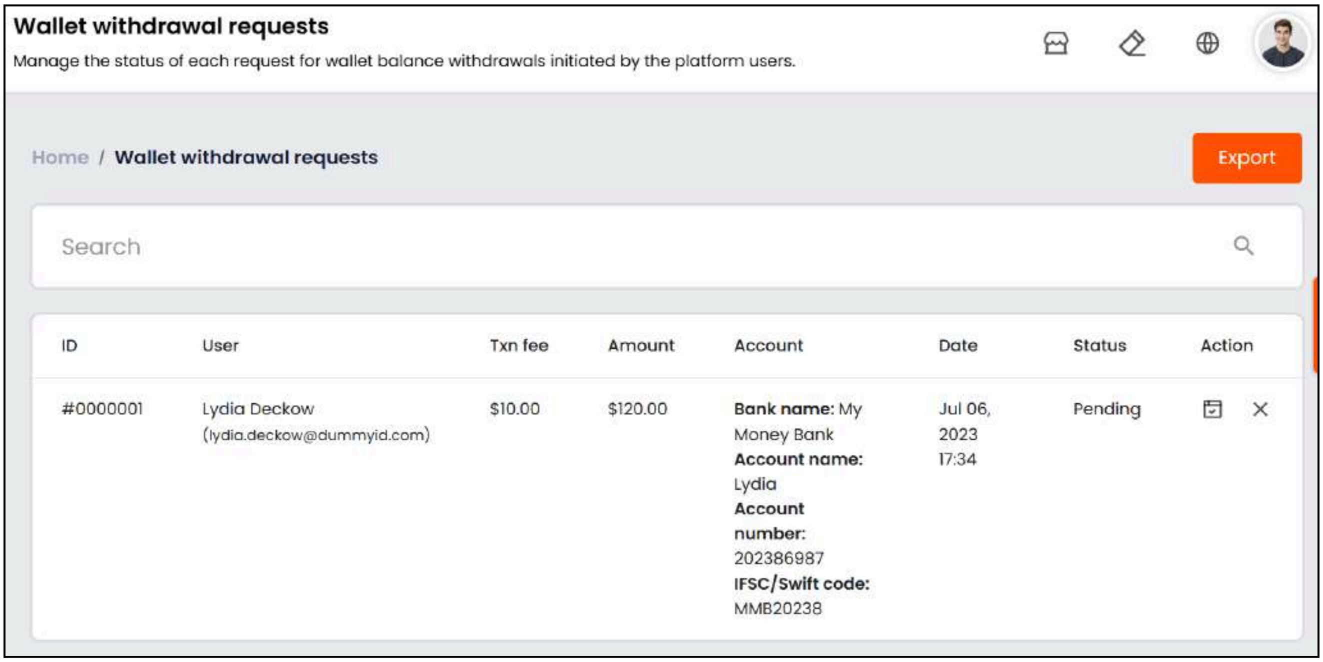
- When a user adds money to their wallet using a payment method such as PayPal, bank transfer, Stripe, etc., the wallet displays the transaction amount. However, the actual funds are deposited into the admin's account.
- When a user requests a withdrawal, the admin transfers the amount to their account. The system then records the transaction as if the amount was withdrawn from the user's wallet.

All transactions on the platform follow this process. Every user's wallet keeps a record of transactions, but all funds are maintained in the admin's account.

Once a **wallet withdrawal request** is placed, it is added under this submodule on the platform.

! *The list will be empty if you just bought the platform and didn't choose to have dummy content provided by FATbit during the platform installation.*

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.



You have the ability to approve or deny the wallet withdrawal requests submitted by users.

Yo!Coach offers two payout options for users to request withdrawals from their wallet, which are displayed on their dashboards.

To enable these options, you must activate and configure both payout methods under **Settings** > [Payment methods](#).

You can also add transaction fees for both options. When a request is made using any of these payment methods, the requested amount will be sent via the selected payout method.

How do the payout methods work?

1. **PayPal payout (Semi-automatic method):** Users can request to withdraw funds from their wallet to their PayPal account.
    - When a request is placed, it will appear in this submodule. You must review the request and either accept or reject it.
    - If you **reject** the request, the update is shared with the user, and no action is taken on the amount.

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- If you **accept** the request, the amount is sent automatically to the user's PayPal account (using your PayPal account configured under **Settings > Payment methods >** [PayPal payout]() settings), after deducting the set transaction fee.

2. **Bank transfer payout (Manual method):** This method requires manual intervention, as you (the admin) must send the payment to the user's bank account using the bank details they provided. The system cannot automate this process.

    - Once a request is placed, it will appear in this submodule.

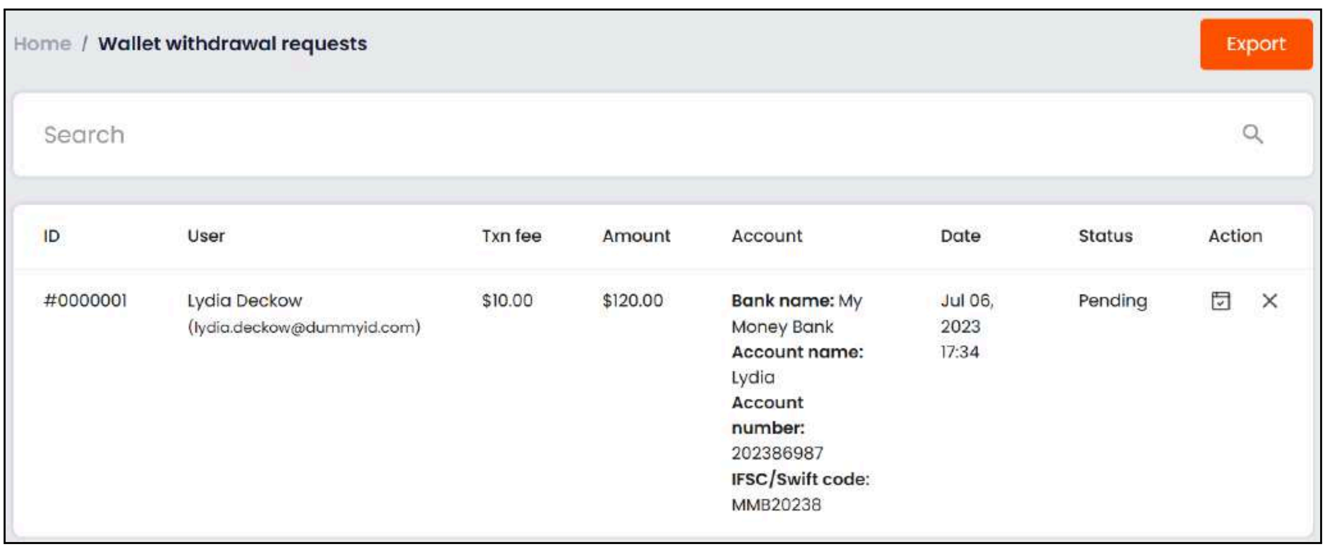
      If you approve the request, you must manually send the payment through your bank or bank app, using the bank details provided by the user.

    - Remember to deduct the transaction fee you have set up under **Payment methods** for the **Bank transfer payout** from the total amount requested before processing the payment.

    - After the payment is sent, update the request's status in the module to reflect the transaction.

Manage the wallet withdrawal requests list

The list of wallet withdrawal requests includes the following information:



- **ID:** The unique request ID.
- **User:** The user's name and registered email address.

- **Txn fee:** The transaction fee charged for the withdrawal. This fee for both payout methods is manageable under **Settings** > Payment methods.

- **Amount:** The amount requested for withdrawal.

- **Account:** The user's payment account details are displayed in this column.

  For PayPal withdrawal requests, the user's PayPal email address is shown.

  For bank transfer withdrawal requests, the user's bank details are displayed, including the bank name, account name, account number, and IFSC/SWIFT code.

- **Date:** The date and time when the request was submitted.

- **Status:** The current status of the request, which can be one of the following: pending, completed, approved, declined payout sent, or payout failed.

Action buttons

Under the **Action** column, each entry with a pending status displays two buttons.

The function of each button is described in detail below.

i. Approve

Click this button beside the request to approve it. Once a wallet withdrawal request is approved, its status is updated to "**Completed**."

- **For PayPal withdrawals**, the amount is automatically transferred from the admin's PayPal Payout account to the user's PayPal account.

  Once the payout is sent, the system reduces the user's wallet balance by the withdrawn amount and records the transaction in the platform's transaction history.

  The request status then updates to "**Payout sent**."

  If the payout fails, the status updates to "**Payout failed**," and the user must submit a new request to process the withdrawal. It is recommended to check your PayPal Payout account and settings to ensure there are no issues on your end. After the entire process is finalized, the request status will be marked as "**Completed**."

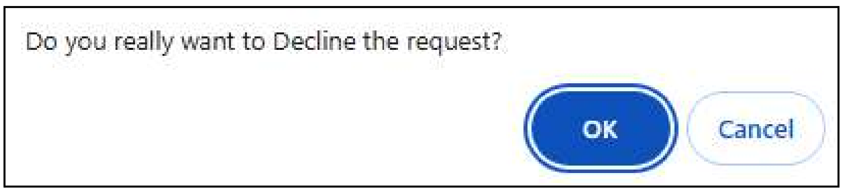
- **For bank account withdrawals**, after approving the request, manually transfer the amount outside the platform to the respective user's bank account.

Clicking this confirms the transaction, prompting the system to mark the amount as sent. The user's wallet balance is then reduced by the withdrawn amount, and the transaction is recorded in the platform's history.

Approved requests cannot be reverted or updated.

ii. Decline

Click this to reject the wallet withdrawal request placed by the user. A warning message will appear.



Click **Ok** to confirm the action, and **Cancel** to cancel it.

Declined requests cannot be reverted or updated.

Search for a wallet withdrawal request

Use the search functionality at the top of the list to find a specific wallet withdrawal request.

Click the search bar or to expand it. Click or the search bar again to collapse the section.

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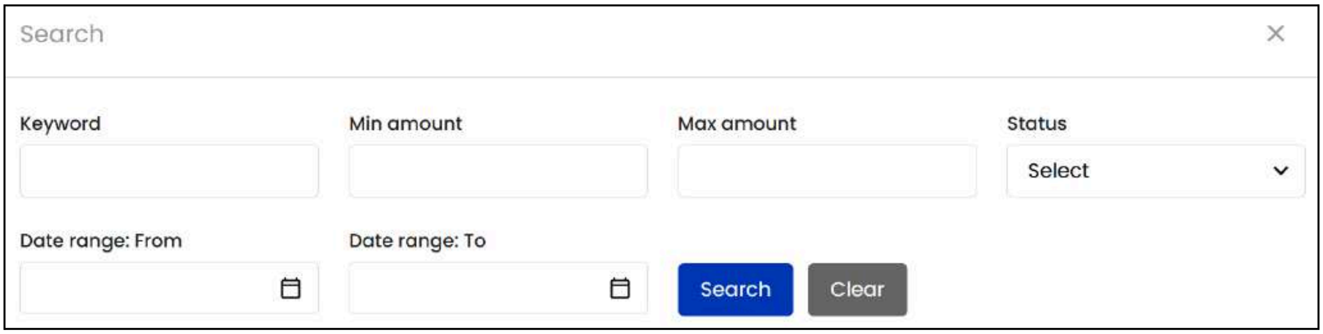
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.



There are several filters that help narrow down the search. Each field is explained below:

- **Keyword:** Enter the reference number of the wallet withdrawal request, the user's name or email address in this field.

- **Min amount:** To view the wallet withdrawal requests made on a specific date, enter the respective amount in this field.

  To filter the wallet withdrawal requests placed within an amount range, enter the minimum amount in this field and the maximum amount of the range in the next field.

- **Max amount:** Enter the maximum amount of the amount range in this field.

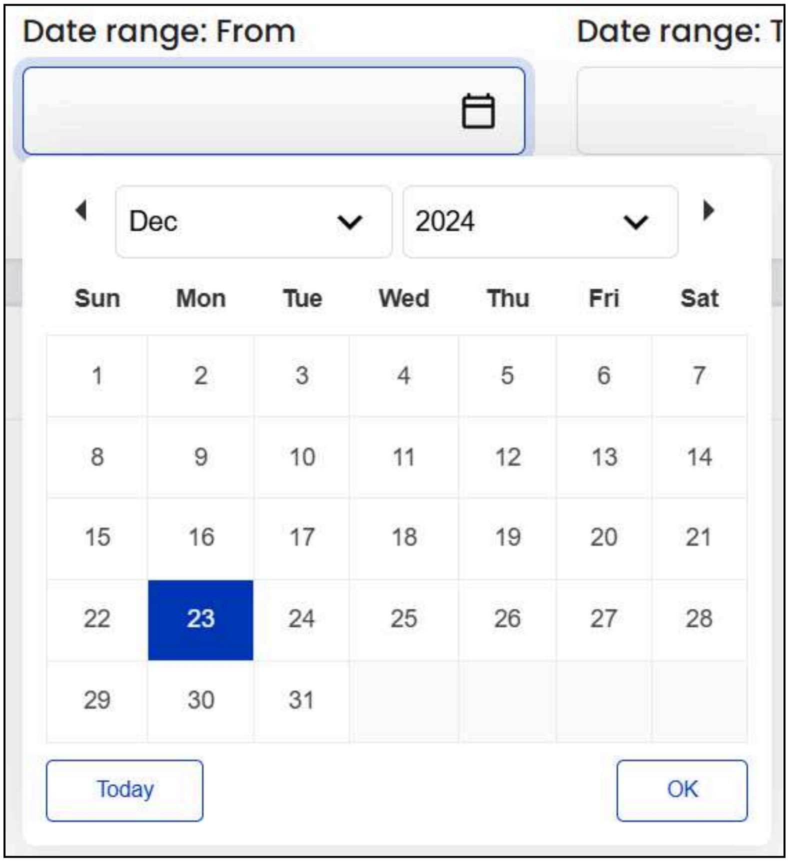
- **Status:** Select the status of the wallet withdrawal request from the dropdown list:

  - Pending
  - Completed
  - Declined
  - Payout sent
  - Payout failed

- **Date range: From:** To view the wallet withdrawal requests placed on a specific date, select the desired date in this field.

  To filter wallet withdrawal requests placed within a date range, select the start date by clicking the field.

  A calendar will appear; choose the date, and it will be added to the field.



Use the **Today** button to select today's date and **Ok** to close the calendar.

- **Date range: To:** Select the ending date of the range in this field.

*The **Date range: From** value must always be an earlier date, and the **Date range: To** value must be later than the date selected in the **Date range: From** field.*

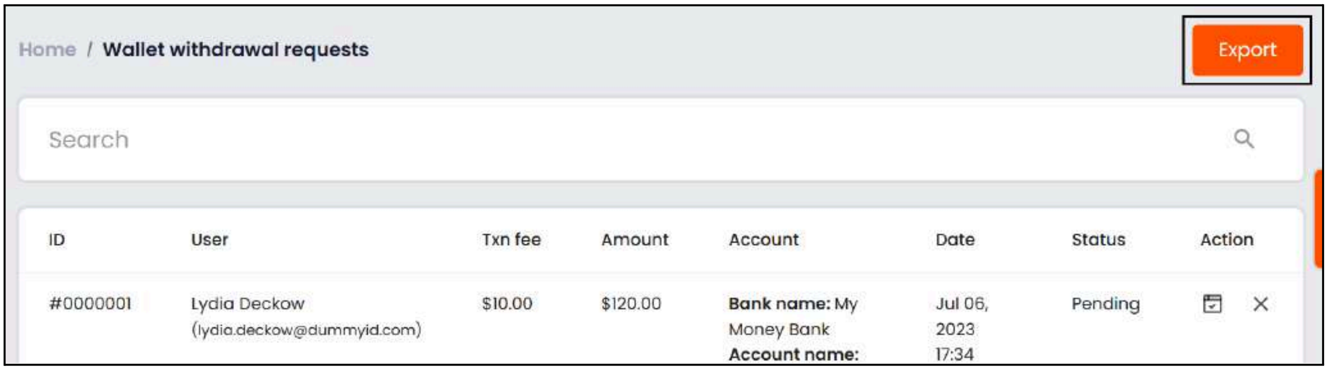
*For example, if the **Date range: From** is 09/24/2020, the **Date range: To** must be a date after this, such as 09/25/2020 or any future date. If incorrect dates are entered, no results will be displayed in the list.*

Search for a wallet withdrawal request by filling in a single field or multiple fields. To view the wallet withdrawal requests placed within a specific date range, use the date fields.

After filling in the desired fields, click **Search** to display the results. Click **Clear** to reset all fields and start a new search.

Export wallet withdrawal requests data

To export wallet withdrawal requests data from this page, click **Export** from the upper-right corner.



The data will be downloaded as a `.csv` file (Comma-Separated Values), which can be used for backups or external purposes.

A success message will appear once the download is complete.

To export specific wallet withdrawal requests data, use the [search bar] to apply the necessary filters and define the criteria.

After setting the filters and clicking **Search** to view the results, click **Export** to download the filtered data as a `.csv` file.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
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The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

3.4 Teacher reviews & ratings

The **Teacher reviews & ratings** module enables you to view and manage the feedback provided by learners for their teachers.

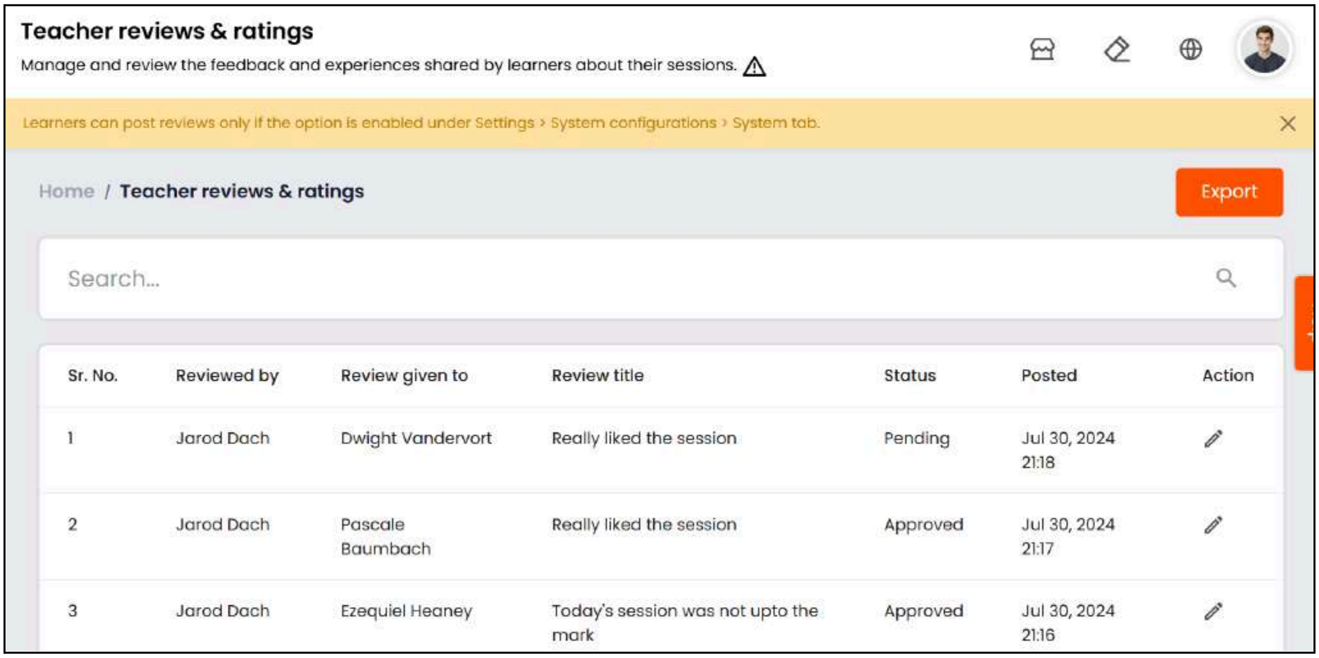
Learners can submit reviews and rate their teachers (1-5 stars) after completing a lesson or group class. These reviews help other learners make informed decisions when selecting a teacher.

Only the reviews with an approved status are displayed on the teacher's front-end profile.

*Learners will only be able to share feedback for completed sessions if the reviews module is activated under **Settings > System configurations > [System](#) tab**.*

*Additionally, define the default review status under **Settings > System configurations > [System](#) tab**. If you set the default review status to "pending," regularly check the submitted reviews and approve the ones you want displayed.*

Regardless of the current status of a review, you can change it later. For instance, if you decline a review, you can update its status to pending or approved at any time.



This page displays a detailed list of all reviews and ratings, organized by status:

- Pending reviews are displayed first.

- Approved reviews follow.
- Declined reviews appear last.

The list will be empty if you just bought the platform and didn't choose to have dummy content provided by FATbit during the platform installation.

Manage the teacher reviews & ratings list

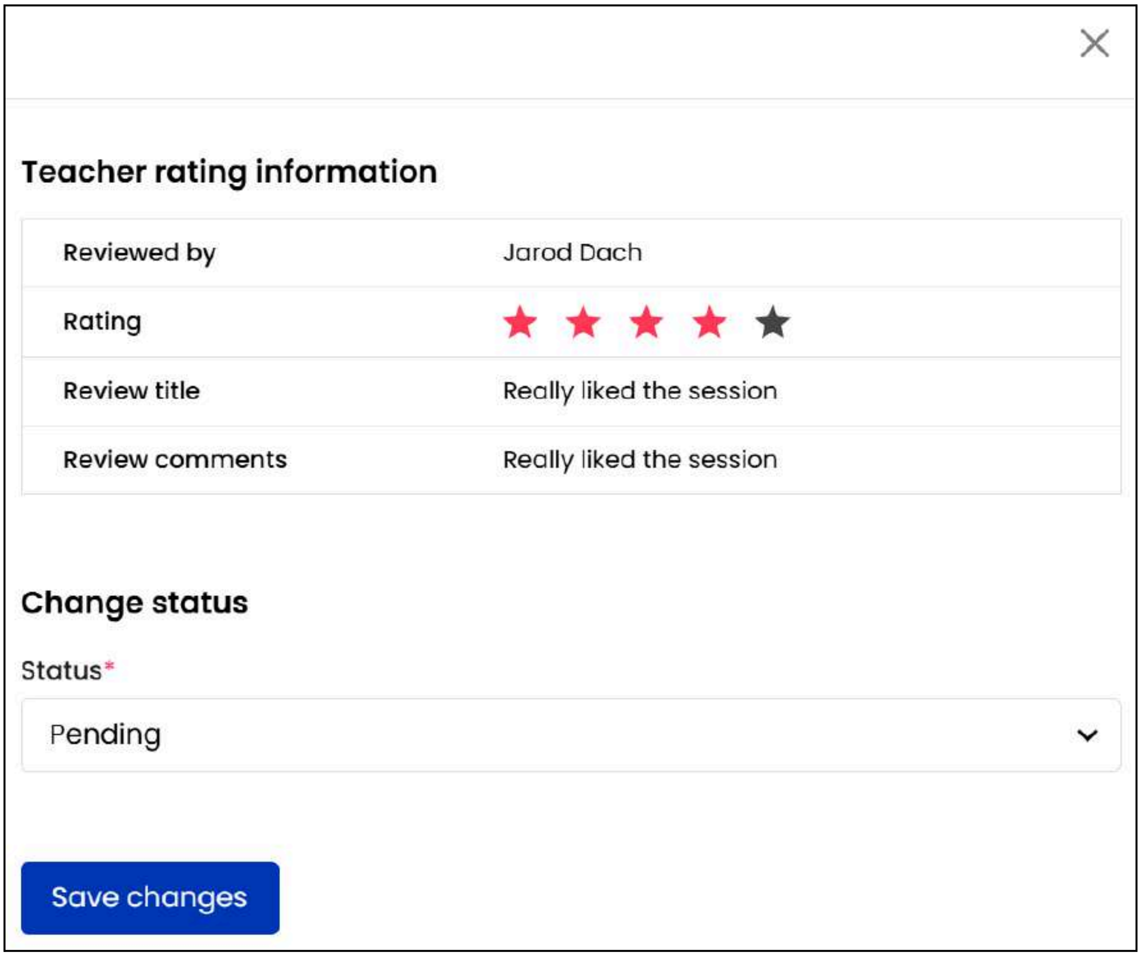
The list displays the following information:

- **Sr. No.:** Serial number
- **Reviewed by:** The name of the user (learner) who submitted the review.
- **Review given to:** The name of the user (teacher) who received the review.
- **Review title:** The comments provided in the review.
- **Status:** The review's current status, which can be pending, approved, or declined.
- **Posted:** The date and time the review was submitted.

Action button

There is a single action button next to each entry—**Edit** . Use this button to view the details of the shared review and update its status.

Clicking this opens a drawer displaying the teacher's rating details and a section to modify the review's status.



Review the information under the Teacher rating information section, including:

- **Reviewed by:** The user (learner) who shared the review.
- **Rating:** The star rating (1 to 5, with 5 being the highest) provided with the review.
- **Review title:** The title of the shared review.
- **Review comments:** Additional details or descriptions included in the review.

Once reviewed, change the status:

- **Status*:** Change the status by clicking the field and selecting from the available options: Pending, Approved, or Declined.

Click **Save changes** to update the status.

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The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

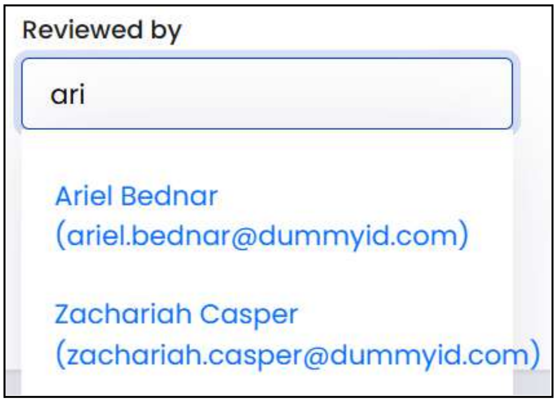
Search for a teacher review & rating

Use the search functionality at the top of the list to find a specific teacher review & rating.

Click the search bar or to expand it. Click or the search bar again to collapse the section.

There are several filters that help narrow down the search. Each field is explained below:

- **Reviewed by:** Enter the name of the user (learner) who posted the review. Place the cursor in the field and start typing. As you type, a list of matching results will appear.



Select the applicable option.

- **Review given to:** Enter the name of the user (teacher) who received the review in this field.

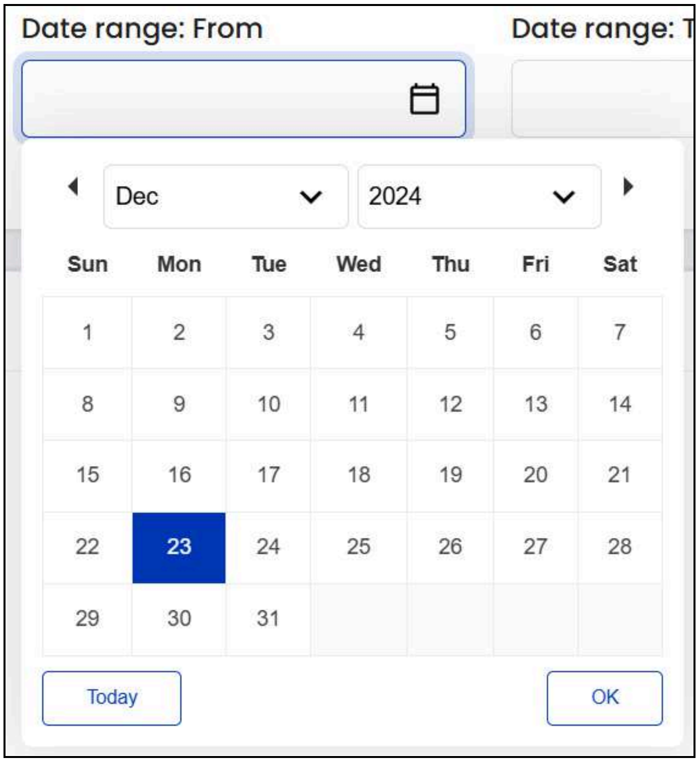
  Place the cursor in the field and start typing. As you type, a list of matching results will appear.

  Select the applicable option.

- **Date range: From:** To view the teacher reviews & ratings made on a specific date, select the desired date in this field.

  To filter teacher reviews & ratings made within a date range, select the start date by clicking the field.

  A calendar will appear; choose the date, and it will be added to the field.



<u>**DISCLAIMER:**</u> The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

Use the **Today** button to select today's date and **Ok** to close the calendar.

- **Date range: To:** Select the ending date of the range in this field.

  *The **Date range: From** value must always be an earlier date, and the **Date range: To** value must be later than the date selected in the **Date range: From** field.*

  *For example, if the **Date range: From** is 09/24/2020, the **Date range: To** must be a date after this, such as 09/25/2020 or any future date. If incorrect dates are entered, no results will be displayed in the list.*

- **Status:** Select the status of the teacher review & rating from the dropdown list:
  - Pending
  - Approved
  - Declined

Search for a teacher review & rating by filling in a single field or multiple fields. To view the teacher reviews & ratings made within a specific date range, use the date fields.

After filling in the desired fields, click **Search** to display the results. Click **Clear** to reset all fields and start a new search.

Export teacher reviews & rating data

To export teacher reviews & ratings data from this page, click **Export** from the upper-right corner.

The data will be downloaded as a `.csv` file (Comma-Separated Values), which can be used for backups or external purposes.

A success message will appear once the download is complete.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
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The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

To export specific teacher reviews & ratings data, use the [search bar](#) to apply the necessary filters and define the criteria.

After setting the filters and clicking **Search** to view the results, click **Export** to download the filtered data as a `.csv` file.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
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The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

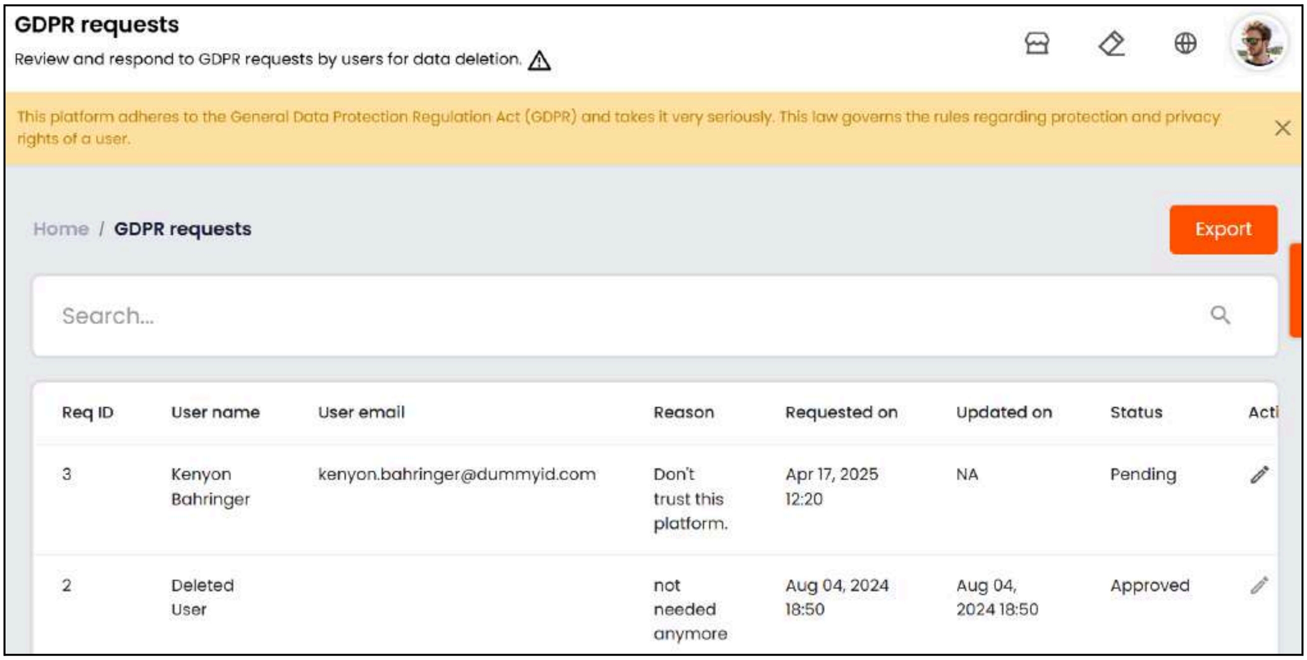
3.5 GDPR requests

Yo!Coach strictly adheres to the **General Data Protection Regulation Act (GDPR)** to ensure user privacy and data protection.

This law governs the rules regarding the protection and privacy rights of users, and the platform prioritizes compliance to create a safe environment for users to share their information.

Users, including teachers, learners, and affiliates, can easily request to delete their accounts and erase personal data, such as addresses, basic information, bank details, profile pictures, and more. This can be done through their dashboard by navigating to **User dashboard > Profile > Account settings > Delete account tab**.

Once a GDPR request is generated, it is sent to you (the admin) for approval and is listed on this page. These requests are arranged in reverse chronological order for easy tracking.



The list will be empty if you've recently purchased the platform and no requests have been placed yet. It will also be empty if all requests have been deleted from the list.

If you approve the request, the user's account and all their personal data stored in the system's database will be permanently deleted.

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However, transaction records and other related details will remain unaffected.

Manage the GDPR requests list

The list displays the following information:

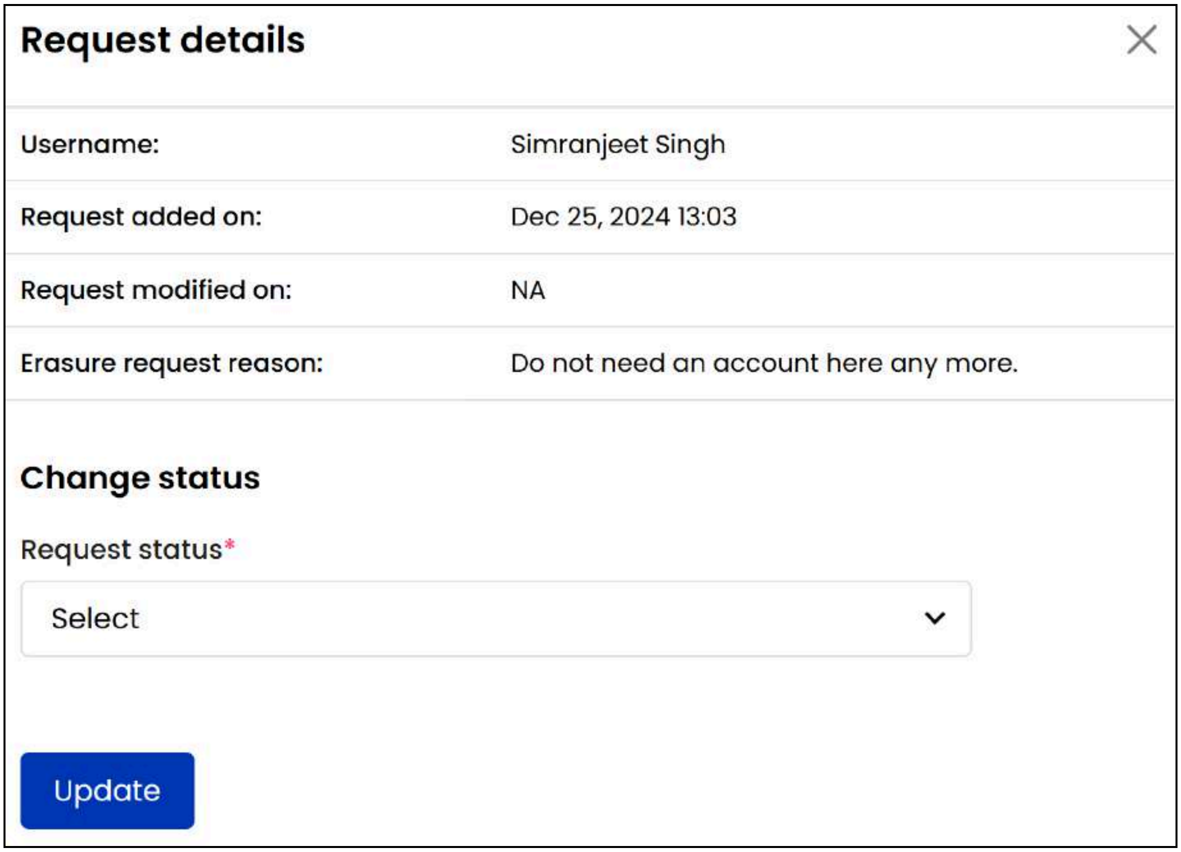
- **Req ID:** The request ID number.
- **User name:** The name of the user who submitted the request. For users whose data has been deleted, this field will show "**Deleted user**."
- **User email:** The email address of the respective user. This field will be blank for requests where the user's data has been deleted.
- **Reason:** The reason provided by the user for placing this request.
- **Requested on:** The date and time the request was submitted.
- **Updated on:** The date and time when the request's status was last updated. If no updates have been made yet, the value will show as NA.
- **Status:** The current status of the request, with the options being:
    - **Pending:** Status of requests that have not yet been reviewed or updated.
    - **Declined:** Status of requests that have been denied.
    - **Approved:** Status of requests that have been approved, and the user's data has been deleted.

Action button

There is a single action button next to each entry—**Edit** and can only be accessed for requests with a pending status.

This button allows you to view the details of the GDPR request and update its status.

Clicking the button opens a drawer that displays the request details along with a section to modify its status.



Review the information under the Request details section, including:

- **Username:** The name of the user who submitted the request.
- **Request added on:** The date and time when the request was initially submitted.
- **Request modified on:** The date and time when the request was last modified. If no modifications have been made, the value will display as NA.
- **Erasure request reason:** The reason provided by the user for submitting the request.

Once reviewed, change the status:

- **Status*:** Change the status by clicking the field and selecting one of the available options:

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- **Declined:** Select this option to decline the account deletion request.
- **Approved:** Select this option to approve the account deletion request. This will delete the user's personal data from the system immediately.
- **Pending:** Leave or select this option if you have not yet decided what to do with the request.

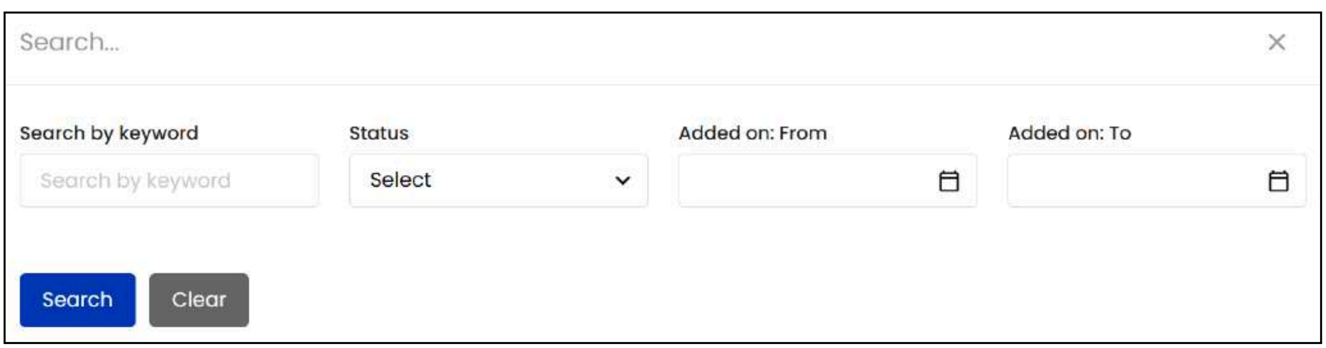
Once a request is accepted or declined, its status cannot be modified.

Click **Update** to save the changes and update the status accordingly.

Search for a GDPR request

Use the search functionality at the top of the list to find a specific GDPR request.

Click the search bar or to expand it. Click or the search bar again to collapse the section.



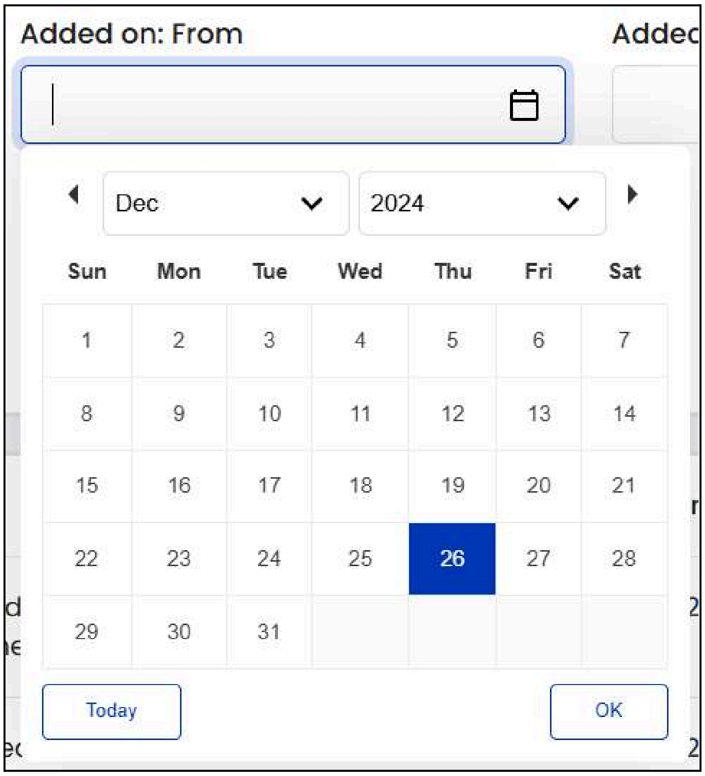
There are several filters that help narrow down the search. Each field is explained below:

- **Search by keyword:** Enter the user's name in this field. To view all deleted users, enter "**deleted user**" and a list of users with the name "**Deleted user**" will appear.

- **Status:** Select the status of the request from the available options:
    - Pending
    - Accepted
    - Declined
- **Added on: From:** To view the GDPR requests placed on a specific date, select the desired date in this field.

  To filter GDPR requests placed within a date range, select the start date by clicking the field.

  A calendar will appear; choose the date, and it will be added to the field.



  Use the **Today** button to select today's date and **Ok** to close the calendar.

- **Added on: To:** Select the ending date of the range in this field.

  *The **Date range: From** value must always be an earlier date, and the **Date range: To** value must be later than the date selected in the **Date range: From** field.*

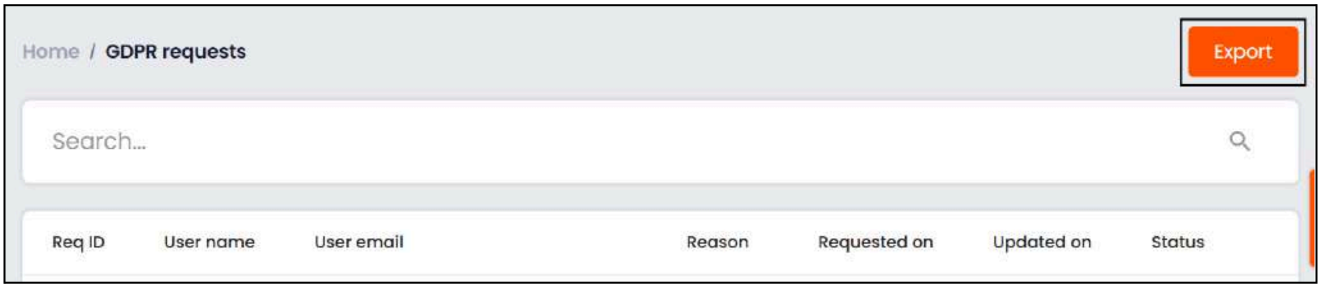
  *For example, if the **Date range: From** is 09/24/2020, the **Date range: To** must be a date after this, such as 09/25/2020 or any future date. If incorrect dates are entered, no results will be displayed in the list.*

Search for a GDPR request by filling in a single field or multiple fields. To view the GDPR requests placed within a specific date range, use the date fields.

After filling in the desired fields, click **Search** to display the results. Click **Clear** to reset all fields and start a new search.

Export GDPR requests data

To export GDPR requests data from this page, click **Export** from the upper-right corner.



The data will be downloaded as a `.csv` file (Comma-Separated Values), which can be used for backups or external purposes.

A success message will appear once the download is complete.

To export specific GDPR requests data, use the [search bar](#) to apply the necessary filters and define the criteria.

After setting the filters and clicking **Search** to view the results, click **Export** to download the filtered data as a `.csv` file.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
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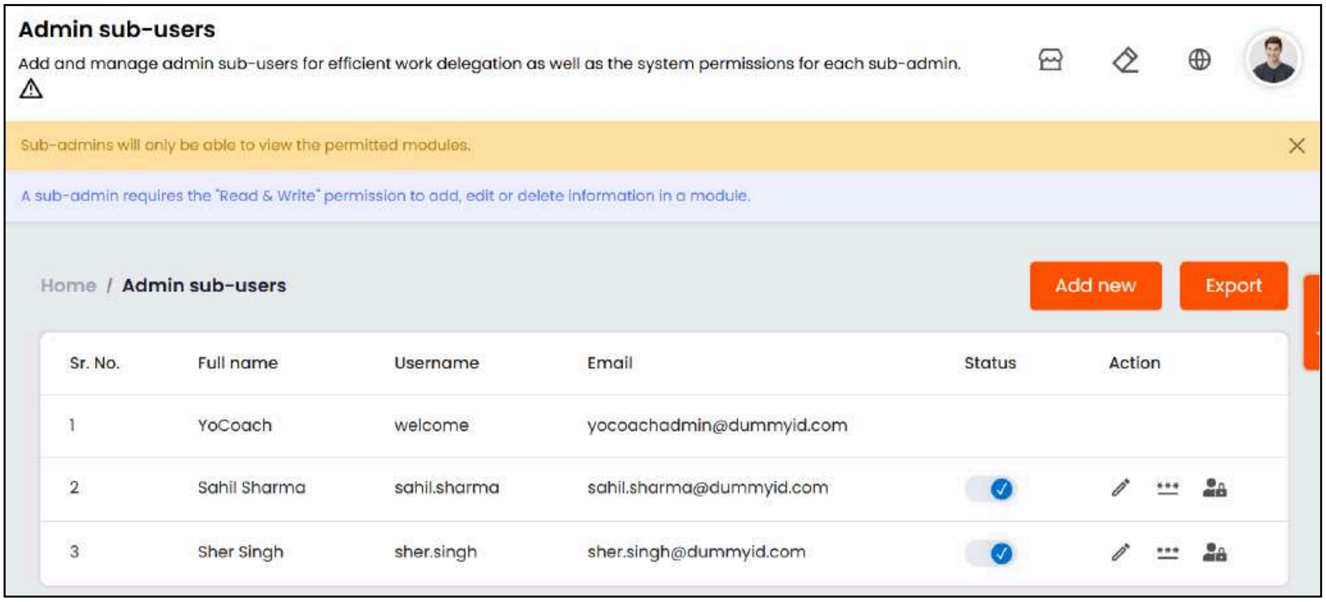
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

3.6 Admin sub-users

When you purchase Yo!Coach, you automatically become the super admin, giving you full control over all submodule functionalities. However, managing all responsibilities on your own can be challenging, and you may need assistance.

This module allows you to add and manage sub-admins to help delegate your tasks, where you can create and manage sub-admin accounts, assign specific permissions, and delegate responsibilities.

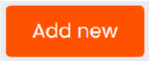
The **Admin sub-users** page displays a detailed list of all sub-admin profiles, with the oldest profiles appearing at the top.



Admin sub-users cannot register on the platform directly, like learners and teachers. Only the super admin can create sub-admin accounts and share credentials with them as needed.

If you've recently purchased the Yo!Coach platform, this list will initially be empty.

Add an admin sub-user

Click 

in the upper-right corner of the page to open the **Admin sub-user setup** form.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
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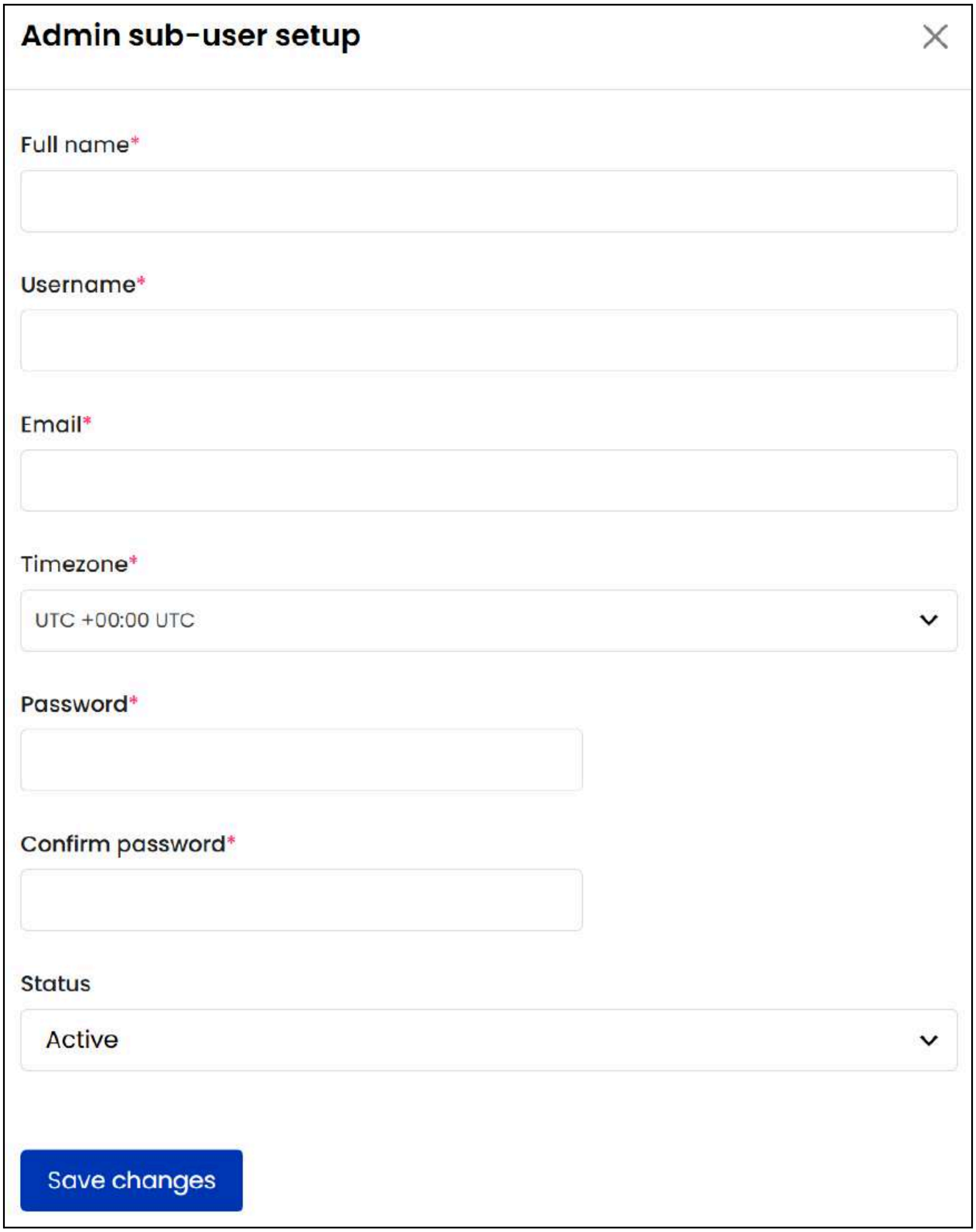


Update the following:

- **Full name*:** Enter the full name of the user.
- **Username*:** Enter the username that the user will use to log into the platform.
- **Email*:** Enter the email address to register the user on the platform.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An asterisk (*) next to a label indicates that the information is mandatory.
The secondary language setting and tabs are ONLY available if you have selected more than one language for the platform.

This email address will be used as the mode of communication between the platform and the user.

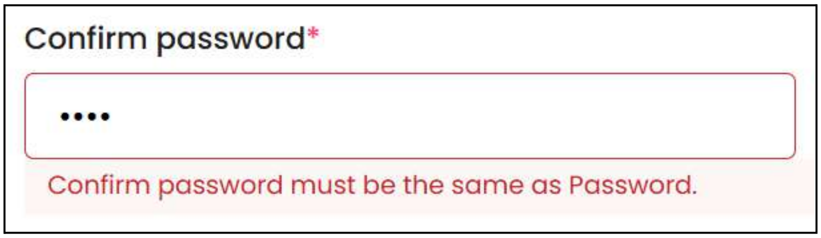
- **Timezone*:** Select the user's timezone from the dropdown list by clicking the field.
- **Password*:** Enter the new password, ensuring it is strong and contains at least 8 characters.

  The password is case-sensitive, meaning "A" and "a" are treated as different characters.

  For enhanced security, use a longer password that includes a mix of letters and numbers.

- **Confirm new password*:** Re-enter the new password from the previous field.

  If the passwords do not match, an error message will be displayed, preventing you from proceeding.



- **Status:** Select the status of the admin sub-user's account by clicking the field and choosing one of the following options:
  - Active: This option is already selected by default. It marks the user as active, allowing them to log into their account and access the platform.
  - Inactive: Select this to restrict the user from logging into their account and accessing the platform.

  Since admin sub-user accounts cannot be deleted, deactivating the account is an effective way to block access to the platform.

Click **Save changes** to create the admin sub-user account.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

The form will close, and the user will be added to the list.

By default, new sub-users do not have any permissions. Assign permissions using the [Permissions button](#) (explained under Action buttons).

Additionally, the sub-user will not receive an email about their registration. You will need to share their login credentials with them directly, outside the platform.

Manage the admin sub-users list

The list displays the following information:

- **Sr. No:** Serial number.
- **Full name:** The super admin/admin sub-user's full name.
- **Username:** The username of the super admin/admin sub-user.
- **Email:** The email address of the super admin/admin sub-user.
- **Status:** Edit the status (activate or deactivate) of an admin sub-user's profile as per your requirements using the toggle switch beside it, under the status column.

  Turn **on** the toggle switch beside the admin sub-user's profile to activate it.

  Leave this **off** or turn it **off** to deactivate the admin sub-user's profile account.

  When you deactivate an admin sub-user's account, they will no longer be able to log in or access their account on the portal.

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An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

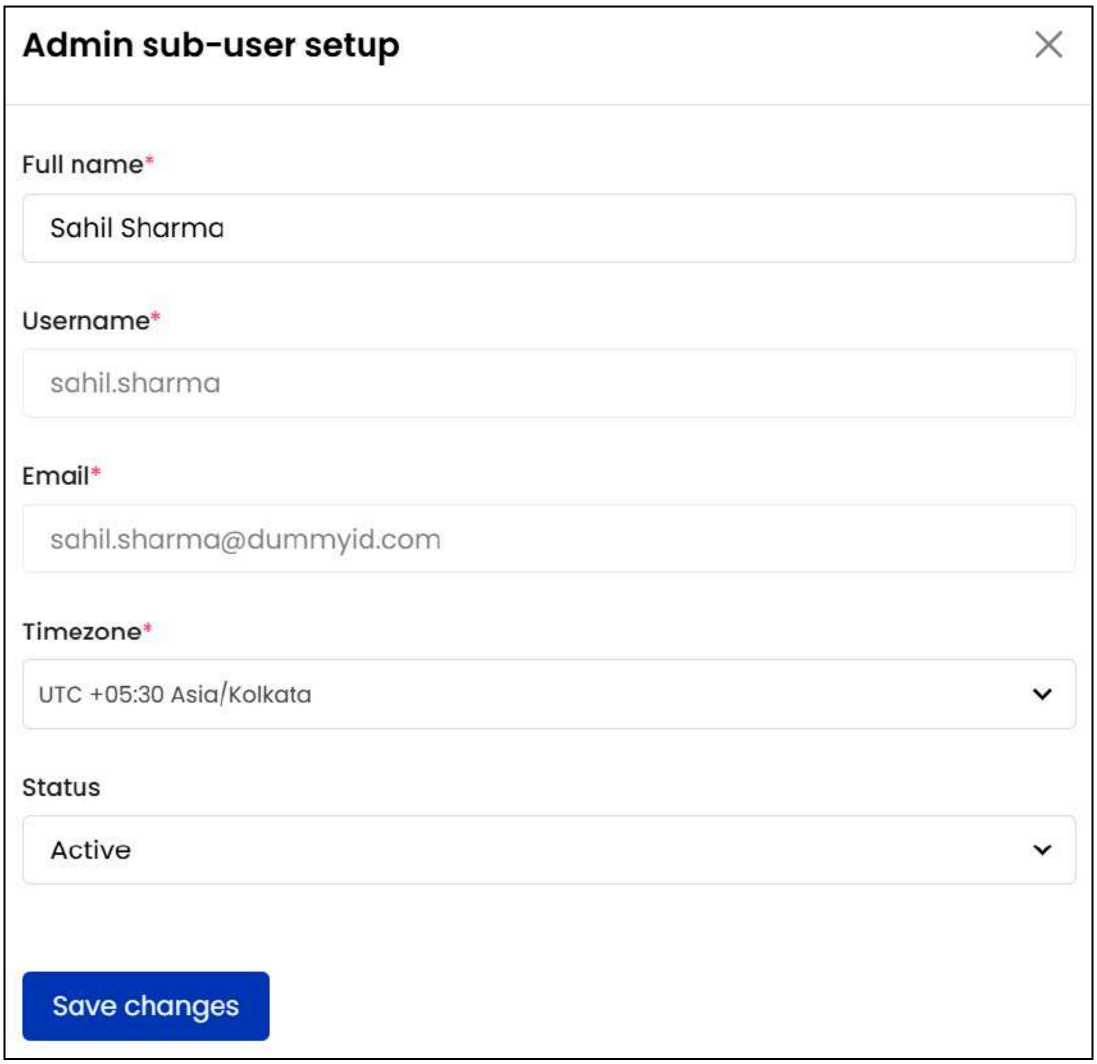
Action buttons

Under the **Action** column, all admin sub-user profiles (except the super admin entry) have three buttons that enable you to perform various actions.

Each button's function is explained in detail below:

i. Edit

Click this to edit the admin sub-user's details. The Admin sub-user setup form will appear.



The fields in this form are fewer than those in the Admin sub-user setup form for adding a new user, though most of the fields remain the same.

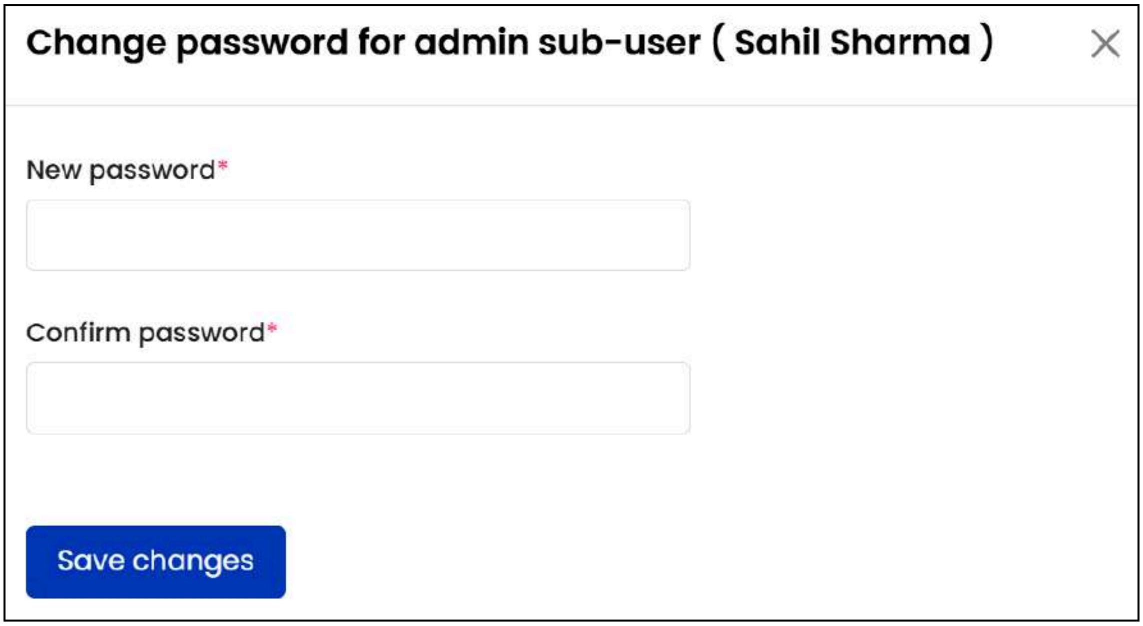
DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

Additionally, you cannot edit the user's email address or username in this form.

Click **Save changes** to update the profile, or close the form by clicking in the upper-right corner.

ii. Change password ***

Click this to change the password for the respective admin sub-user's account and the **Change password for admin sub-user (name)** form will appear.



Update the following:

- **New password:** Enter the new password, ensuring it is strong and contains at least 8 characters.

  The password is case-sensitive, meaning "A" and "a" are treated as different characters.

  It's recommended to use a long password that includes a mix of alphanumeric characters (numbers and letters).

- **Confirm new password:** Re-enter the same password you entered in the previous field.

  If the passwords do not match, an error will be displayed, and you won't be able to proceed.

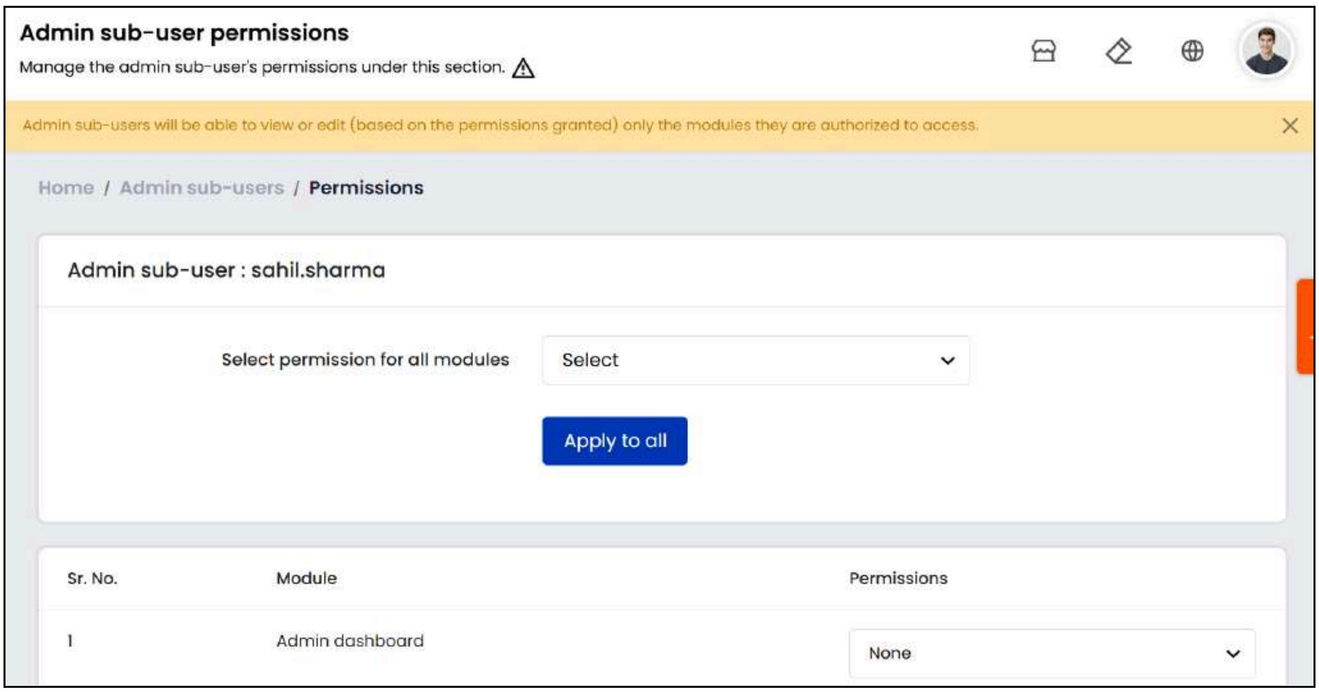
Click **Save changes** to update it.

The admin sub-user will not receive a notification about the password update. They will only become aware of the change when attempting to log into their account and may contact you for assistance.

iii. Permissions

Click this to edit the access of submodules and their functions for the respective admin sub-user.

The respective user's permissions page will open.



Each submodule is listed on this page and beside it are the permissions you can give to the respective user.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
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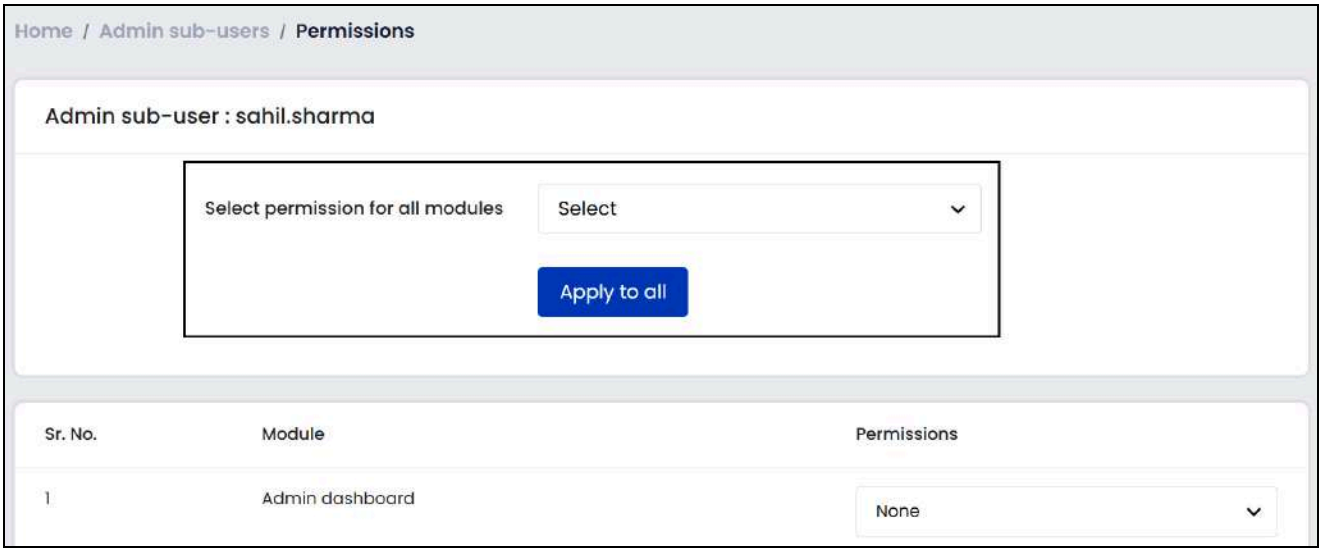
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

For instance, the admin dashboard submodule includes a dropdown list with the following options:

- **None:** Choose this option to restrict the admin sub-user from accessing the respective submodule. The submodule will not appear on their dashboard.
- **Read only:** Choose this option to grant the admin sub-user view-only access to the respective submodule. They can view all details but cannot perform any actions such as adding, editing, deleting, or modifying anything.
- **Read & write:** Choose this option to allow the admin sub-user full access to the respective submodule. They can view and perform actions such as adding, editing, deleting, or modifying information.

Set the same permission for all submodules collectively

At the top of the list, a dropdown field and a button enable you to assign the same permission to all submodules for the admin sub-user.



For example, if you want to grant **Read only** access to the admin sub-user for all submodules on the platform, select **Read only** from the dropdown field.

Then, click **Apply to all**, and the selected permission will be applied to all submodules in the list below.

If you need to adjust permissions for specific submodules, manually select the desired permission from the dropdown field beside each respective submodule.

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Sr. No.	Module	Permissions
1	Admin dashboard	Read only
2	Platform users	Read and write
3	Teacher registration requests	None

The selected permission is automatically updated as soon as you make a change.

Return to the Admin sub-users page

Once you've finished updating permissions, return to the **Admin sub-users** page by clicking **Admin sub-users** in the breadcrumbs at the top of this page.

Alternatively, navigate back to the **Admin sub-users** page by selecting the submodule from the navigation panel.

Export admin sub-users data

To export admin sub-users data from this page, click **Export** from the upper-right corner beside the **Add new** button.

Home / Admin sub-users Add new Export

Sr. No.	Full name	Username	Email	Status	Action
1	YoCoach	welcome	yocoachadmin@dummyid.com		
2	Sahil Sharma	sahil.sharma	sahil.sharma@dummyid.com		

<u>**DISCLAIMER:**</u> The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

The data will be downloaded as a `.csv` file (Comma-Separated Values), which can be used for backups or external purposes.

A success message will appear once the download is complete.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

4. Group classes

The Group classes module enables you to track both individual classes and packages. It is organized into two submodules: **Group classes** and **Packages**.

This module is designed to simplify the management of both individual group classes and bundled packages on the platform.

Expand this module to view its submodules. Click on any submodule to visit its respective page. Each submodule is explained in detail.

4.1 Group classes

This module enables you to efficiently track both standalone **group classes** and **group class packages** together.

What are group classes & packages?

- **Group classes:** The term **Group classes** is used to differentiate these sessions from lessons, which on this platform refer to one-on-one interactions between a teacher and a single learner.

  On the other hand, a group class involves one teacher instructing multiple learners. For instance, a single math session attended by multiple learners is considered a group class.

  ! *The reason **"group classes"** is used instead of just "**classes**" is to prevent confusion with **lessons**. While "**class**" could sometimes be mistaken for a one-on-one session, using "**group classes**" clearly defines that the session involves multiple learners and one teacher, ensuring better clarity.*

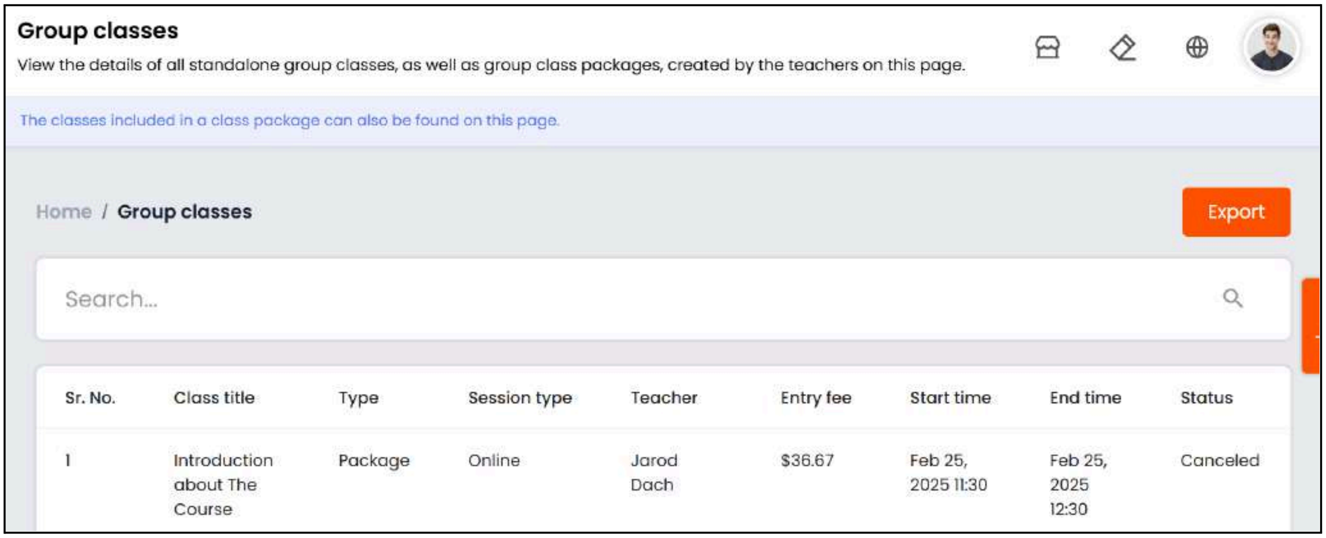
  Group classes will always be conducted online.

- **Packages:** Packages are collections of group classes bundled together. For example, a package can consist of 10 math classes.

Multiple settings affect group classes on the platform, including class duration, cancellation terms, refund policies, and more. These settings can be managed under **Settings > System configurations > Classes tab.**

Based on the configured settings, teachers can add group classes and packages to the platform.

All group classes and packages created by teachers are listed on this page in reverse chronological order according to their start time, making it easy to locate the most recent or upcoming sessions.



The list will be empty if you just bought the platform and didn't choose to have dummy content provided by FATbit during the platform installation.

Manage the group classes list

The following details can be viewed on this page:

- **Sr. No.:** Serial number.
- **Class title:** The title of the group class as added by the teacher.
- **Type:** This defines the type of group class, which can be either a regular class (an individual class) or a package (a collection of classes).
- **Session type:** This defines the type of session, which can be either an online or an offline group class.

  This column remains visible even if offline sessions are deactivated under **Settings > System configurations >** [Offline sessions](#).
- **Teacher:** The name of the teacher hosting the group class or package.

- **Entry fee:** The entry fee for the class or package as set by the teacher.
- **Start time:** The date and time when the group class will start.

  For package group classes, it displays the start time and date of the first class in the package.
- **End time:** The date and time when the group class will end.

  For package group classes, it displays the end time and date of the last class in the package.
- **Status:** The current status of a group class can be canceled, completed, or scheduled.

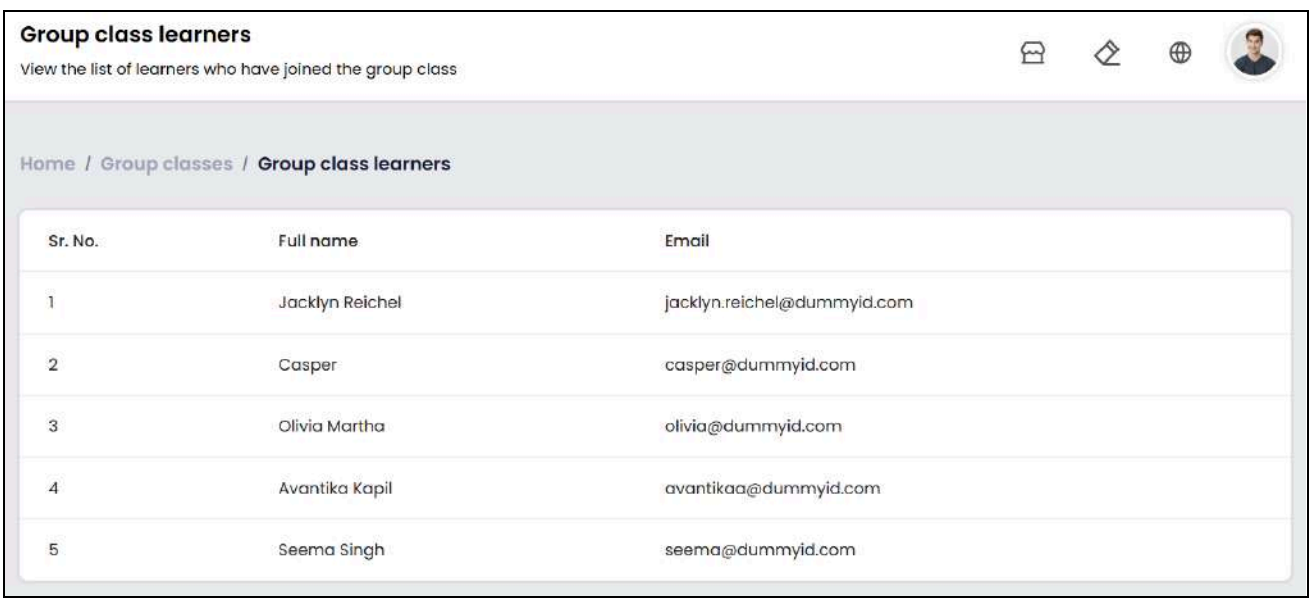
  Group classes or packages with no enrolled learners that have passed their scheduled start time are marked as canceled. Those scheduled for a future date are marked as scheduled.

  Classes or packages with enrolled learners that have been conducted and for which the scheduled end time has passed are marked as completed.

Action button

There is a single action button next to each entry—**View learners** .

This button lets you view all learners enrolled in a group class or package. Clicking it redirects you to the **Group class learners** page.


Group class learners

View the list of learners who have joined the group class

Home / Group classes / **Group class learners**

Sr. No.	Full name	Email
1	Jacklyn Reichel	jacklyn.reichel@dummyid.com
2	Casper	casper@dummyid.com
3	Olivia Martha	olivia@dummyid.com
4	Avantika Kapil	avantikaa@dummyid.com
5	Seema Singh	seema@dummyid.com

The following details can be viewed on this page:

- **Sr. No.:** Serial number.
- **Full name:** The full name of the learner who enrolled for the group class or package.
- **Email:** The email address of the learner.

Return to the Group classes page

After reviewing the information, go back to the **Group classes** page by clicking **Group classes** in the breadcrumbs at the top of this page.

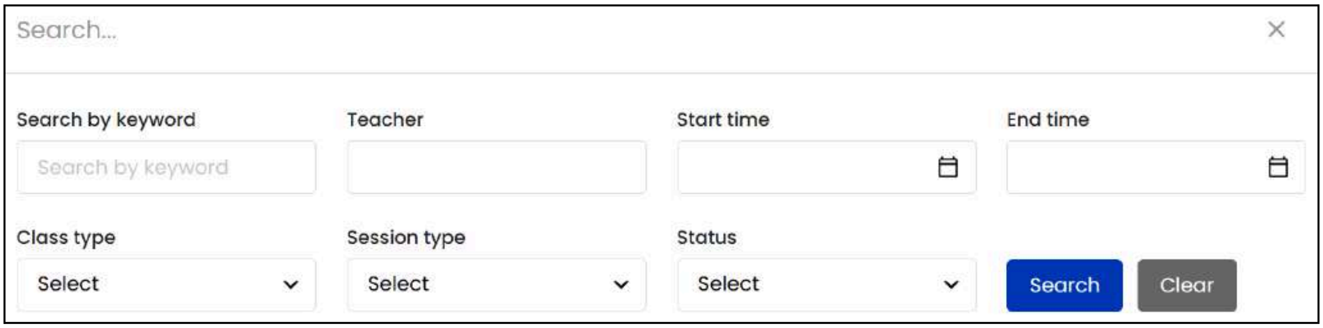
Alternatively, navigate back to the [Group classes](#) page by selecting the submodule from the navigation panel.

Search for a group class

Use the search functionality at the top of the list to find a specific group class.

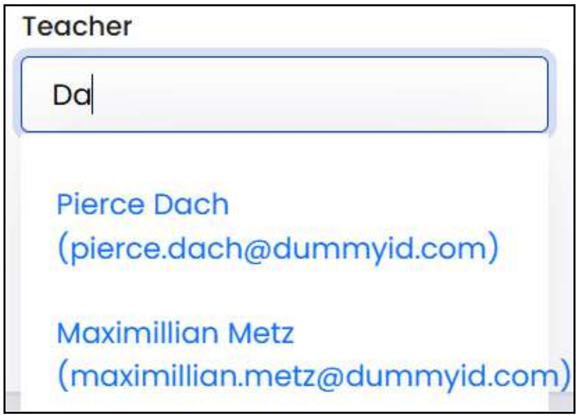
Click the search bar or to expand it. Click or the search bar again to collapse the section.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.



There are several filters that help narrow down the search. Each field is explained below:

- **Search by keyword:** Enter the group class name or group class package name in this field.
- **Teacher:** Enter the name of the teacher who created and is teaching the class. Place the cursor in the field and start typing. As you type, a list of matching results will appear.

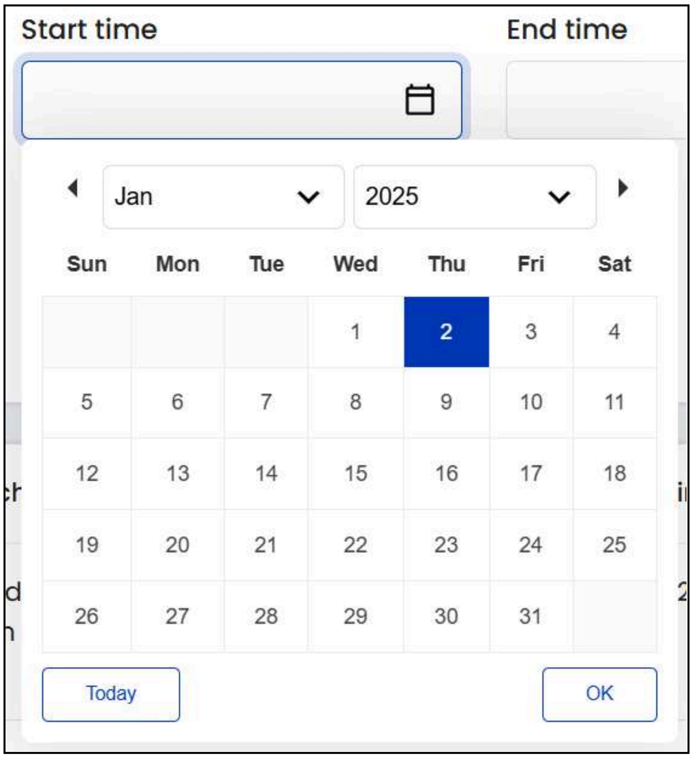


  Select the applicable option.

- **Start time:** To view the group classes of a specific date, select the desired date in this field. To filter group classes that fall within a date range, select the start date by clicking the field.

  A calendar will appear; choose the date, and it will be added to the field.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.



Use the **Today** button to select today's date and **Ok** to close the calendar.

- **End time:** Select the end time of the range in this field.

  *The **Start time** value must always be an earlier date, and the **End time** value must be later than the date selected in the **Start time** field.*

  *For example, if the **Start time** is 09/24/2020, the **End time** must be a date after this, such as 09/25/2020 or any future date. If incorrect dates are entered, no results will be displayed in the list.*

- **Class type:** Select the type of class from the available options:
  - Regular
  - Package
- **Session type:** Select the type of session from the available options:
  - Online
  - Offline

    *Offline classes are available only if the offline sessions feature is activated. To activate it, go to **Settings** > **System configurations** > [Offline sessions](). Once activated, teachers can create offline packages.*

- **Status:** Select the status of the class from the available options:

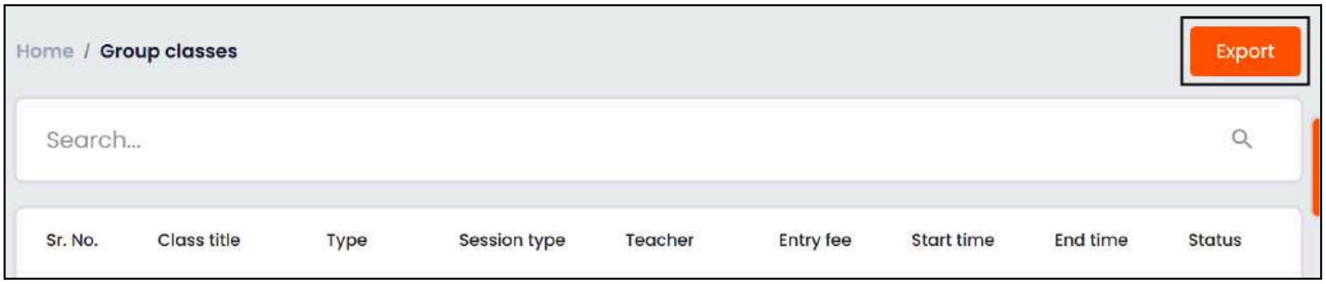
- Scheduled
- Completed
- Canceled

Search for a group class by filling in a single field or multiple fields. To view the group classes within a specific date range, use the date fields.

After filling in the desired fields, click **Search** to display the results. Click **Clear** to reset all fields and start a new search.

Export group classes data

To export group classes data from this page, click **Export** from the upper-right corner.



The data will be downloaded as a `.csv` file (Comma-Separated Values), which can be used for backups or external purposes.

A success message will appear once the download is complete.

To export specific group classes data, use the [search bar]() to apply the necessary filters and define the criteria.

After setting the filters and clicking **Search** to view the results, click **Export** to download the filtered data as a `.csv` file.

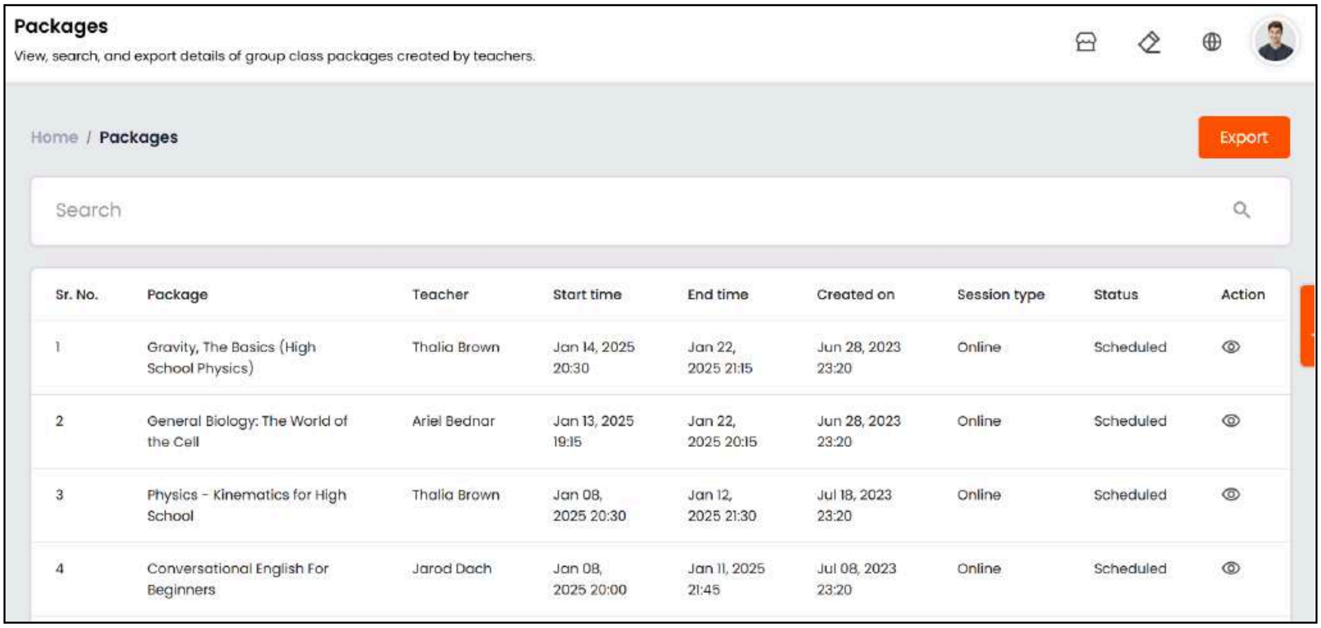
DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

4.2 Packages

The **Packages** page provides a comprehensive list of all the packages created on the platform by teachers.

Teachers have the provision to group multiple classes together into a set, called a **Package**. These packages are scheduled in advance and are purchased by learners for a one-time entry fee.

This page lists all the packages created by teachers for you to track.



The list will be empty if you just bought the platform and didn't choose to have dummy content provided by FATbit during the platform installation.

Manage the packages list

The following details can be viewed on this page:

- **Sr. No.:** Serial number.
- **Package:** The name of the package as set by the teacher.
- **Teacher:** The name of the teacher who created the package and will be teaching the classes included in it.

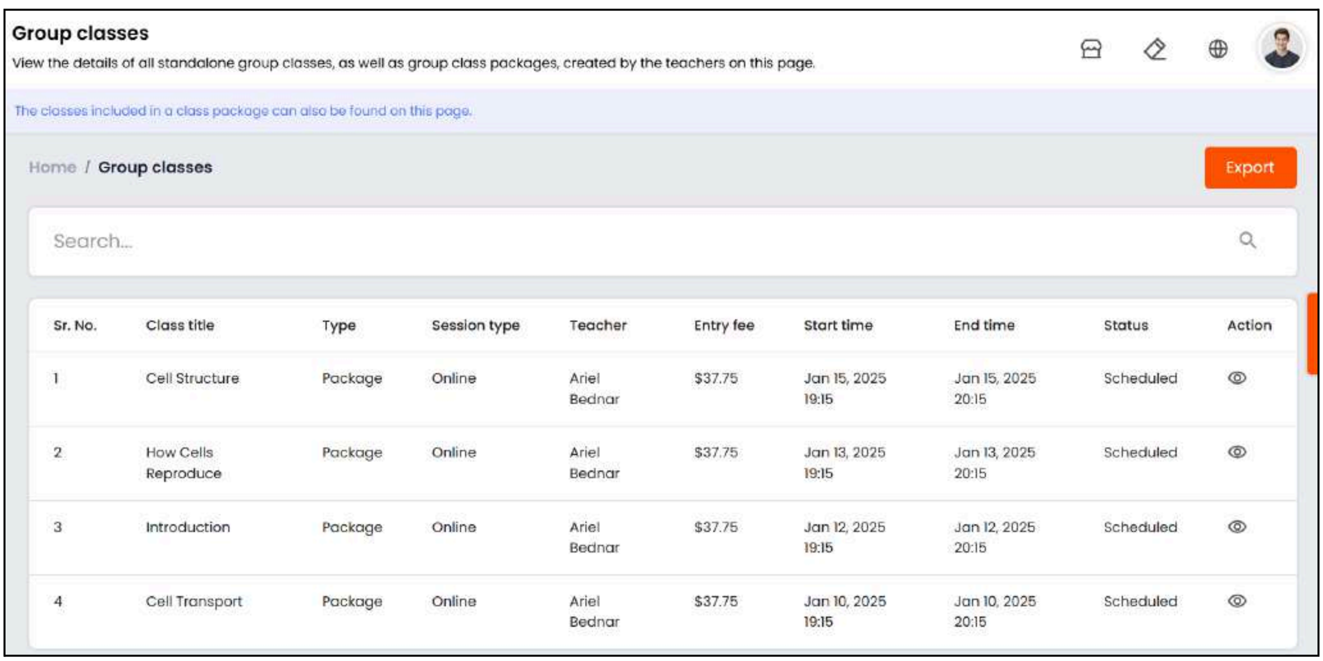
- **Start time:** The start date and time of the package.
- **End time:** The end date and time of the package.
- **Created on:** The date and time when the teacher created the package.
- **Session type:** This defines the type of class session conducted under the package, either online or offline.

  The column remains visible even if offline sessions are deactivated under **Settings > System configurations >** [Offline sessions].
- **Status:** Displays the current status of the package. Available statuses include Scheduled, Canceled, or Completed.

Action button

There is a single action button next to each entry—**Classes** .

Click this button to view all learners enrolled in the package. This action redirects to the **Group classes** page, which lists only the classes associated with the package.



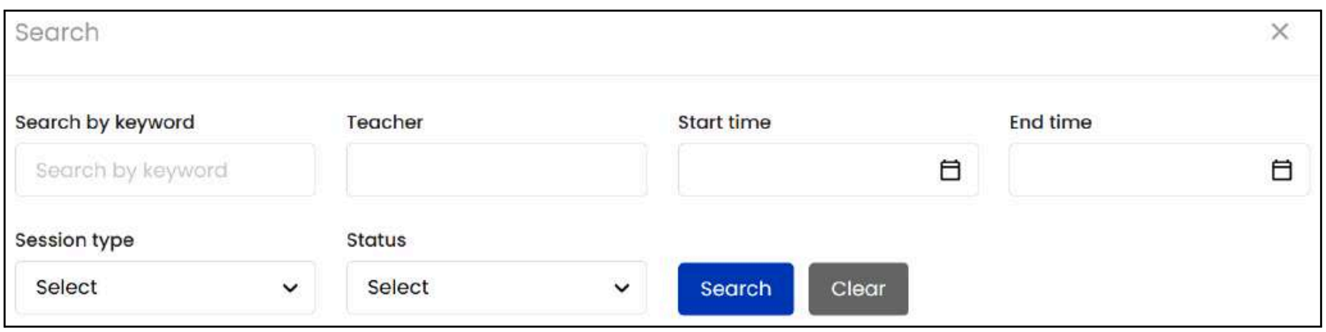
The details displayed are identical to those on the [Group classes] page, but the list is limited to classes under the package. Perform the same actions as available in the [Group classes](#) submodule (for more information on these actions, refer to the [Group classes](#) submodule documentation).

To return to the **Packages** page, select the **Packages** submodule from the navigation panel.

Search for a package

Use the search functionality at the top of the list to find a specific package.

Click the search bar or to expand it. Click or the search bar again to collapse the section.



There are several filters that help narrow down the search. Each field is explained below:

- **Search by keyword:** Enter the package name in this field.
- **Teacher:** Enter the name of the teacher who created and is teaching the classes under the package.

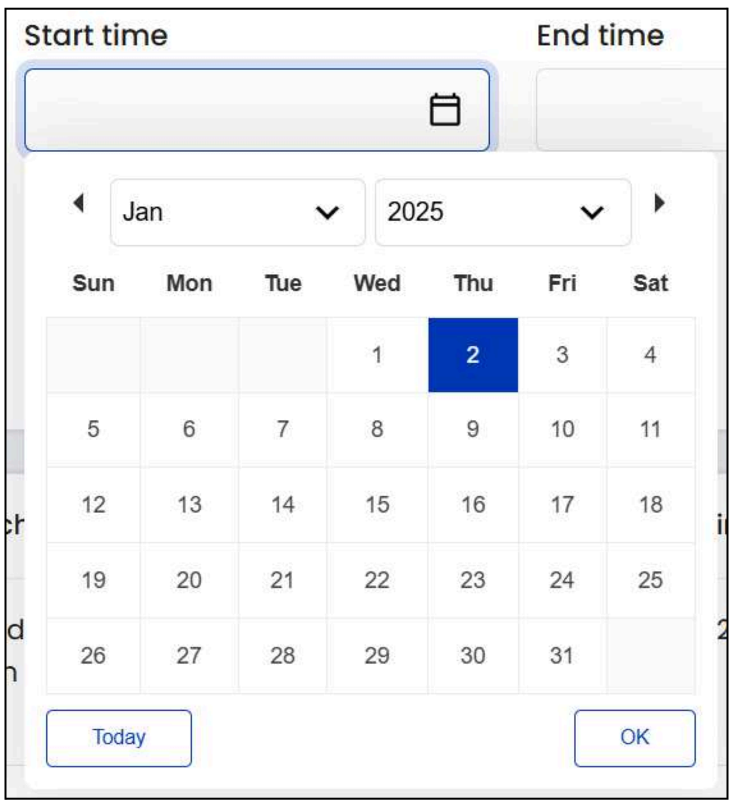
  Place the cursor in the field and start typing. As you type, a list of matching results will appear.

Select the applicable option.

- **Start time:** To view the packages of a specific date, select the desired date in this field.

  To filter packages that fall within a date range, select the start date by clicking the field.

  A calendar will appear; choose the date, and it will be added to the field.



Use the **Today** button to select today's date and **Ok** to close the calendar.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

- **End time:** Select the end time of the range in this field.

  *The **Start time** value must always be an earlier date, and the **End time** value must be later than the date selected in the **Start time** field.*

  *For example, if the **Start time** is 09/24/2020, the **End time** must be a date after this, such as 09/25/2020 or any future date. If incorrect dates are entered, no results will be displayed in the list.*

- **Session type:** Select the type of sessions included in the package from the available options:
  - Online
  - Offline

    *Offline classes are available only if the offline sessions feature is activated. To activate it, go to **Settings > System configurations > [Offline sessions](#)**. Once activated, teachers can create offline packages.*

- **Status:** Select the status of the package from the available options:
  - Scheduled
  - Completed
  - Canceled

Search for a package by filling in a single field or multiple fields. To view the packages within a specific date range, use the date fields.

After filling in the desired fields, click **Search** to display the results. Click **Clear** to reset all fields and start a new search.

Export packages data

To export packages data from this page, click **Export** from the upper-right corner.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

The data will be downloaded as a `.csv` file (Comma-Separated Values), which can be used for backups or external purposes.

A success message will appear once the download is complete.

To export specific packages data, use the [search bar] to apply the necessary filters and define the criteria.

After setting the filters and clicking **Search** to view the results, click **Export** to download the filtered data as a `.csv` file.

5. Courses

*This module is visible only if the courses feature has been enabled under **Settings > System configurations >** [System](#).*

Courses are pre-recorded lessons created by registered teachers to help learners gain knowledge and skills on various topics. They form the backbone of the platform, providing structured learning materials that students can access at their own pace.

As the admin, your role is to define course languages and categories for teachers to use when creating their courses. This module also allows you to track all courses created by teachers on the platform.

Expand this module to view its submodules. Click on any submodule to visit its respective page. Each submodule is explained in detail.

5.1 Course languages

This sub-module enables you to manage all the languages in which courses can be offered on the platform. Teachers can select a specific course language to deliver materials, instructions, and communications, ensuring content is accessible and tailored to the diverse needs of students.

Unlike system languages, course languages are dedicated solely to courses, promoting a personalized and inclusive learning environment by supporting a wide range of language options.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
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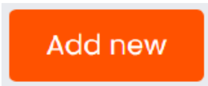
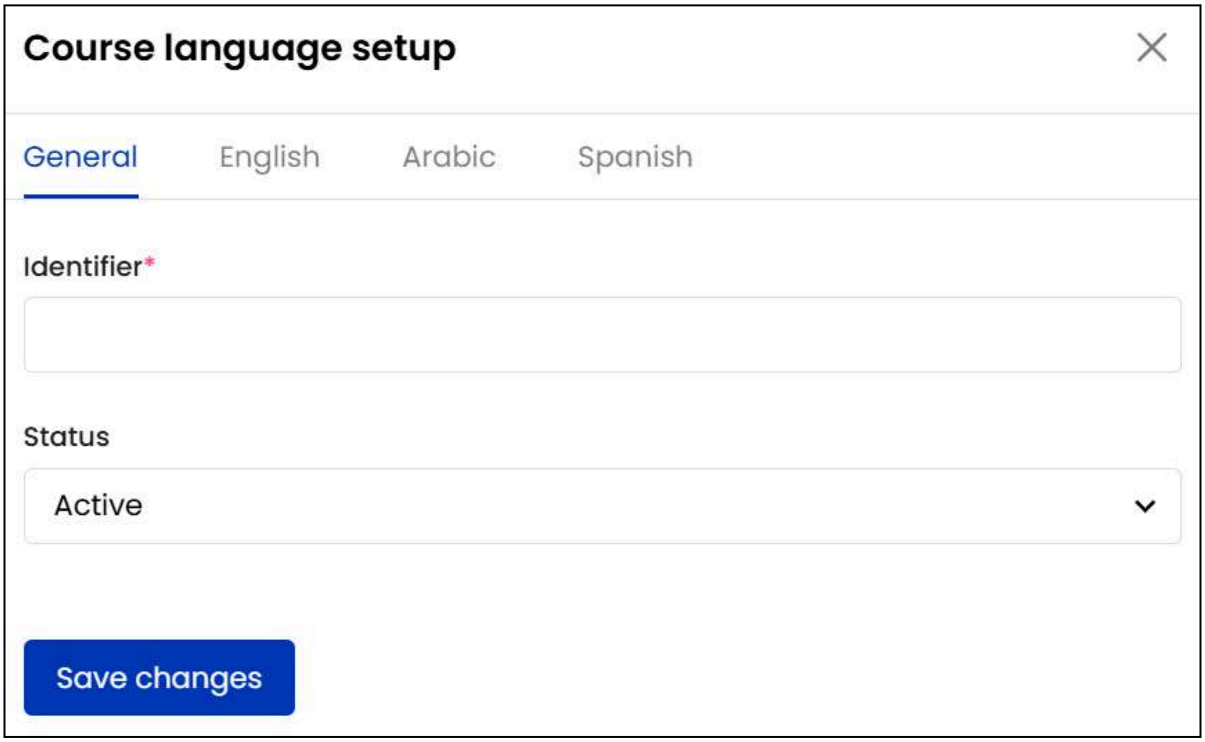
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

The list will be empty if you just bought the platform and didn't choose to have dummy content provided by FATbit during the platform installation.

Add a course language

Click 

in the upper-right corner of the page to open the **Course language setup** form.



This form contains multiple tabs: the [General](#) tab, followed by the [Primary language](#) tab. After that, you'll find the [Secondary language](#) tabs, corresponding to the languages available on your platform.

Let's start with the **General tab**.

General tab

Update the following:

- **Identifier*:** Enter a unique course language identifier. It can match the course language name, as defined under the Language data tabs (e.g., English, Arabic, Spanish).

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An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

> *The identifier is used to save data in the system and will not be displayed anywhere on the platform. Ensure the identifier is unique; otherwise, an error message will appear.*

- **Status:** Select the status of the course language.

  Click the field and select "**Active**" to publish it on the platform, enabling it to be linked to courses.

  Select "**Inactive**" to temporarily hide the course language; it will not appear in the course language dropdown lists across the platform, preventing teachers from linking courses to it.

Once done, click **Save changes**.

This will direct you to the next tab, which is the primary language tab (English tab).

English tab

This is the primary language tab, and completing this tab is mandatory for publishing the course language on the platform.

Since English is set as the primary language, this tab is labeled **English**.

Update the following:

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- **Name*:** Enter the course language name in the primary language.

  This name will be displayed to both teachers and learners under the course languages list.

- **Auto-translate into other languages:** Check mark this to automatically update the secondary language(s) data. The data in the subsequent language tab(s) will be auto-filled.

  *This feature is available only if the [Microsoft text translator API]() is configured under **Settings > System configurations >** [Third-party APIs]().*

  If you prefer to manually fill in the secondary language(s) data, leave the checkbox unselected.

Once done, click **Save changes**.

The next tab(s) will be the secondary language tab(s) (Arabic, Spanish, etc.), which include the same fields as the English tab.

Edit the details as needed and save.

*If you had selected the auto-translate option, the secondary language tab(s) will be prefilled. Review the data, make any necessary edits, click **Save changes**, and close the form.*

*If you did not use the auto-translate feature earlier, use the **Auto-translate & fill language data** button beside the **Save changes** button on each secondary language tab to auto-fill the secondary language fields. Then, click **Save changes**, and move to the next tab, or close the form.*

<u>**DISCLAIMER:**</u> The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

*If you do not want to fill the secondary language tab(s) at this time, complete only the primary language tab (English tab), click **Save changes**, and close the form.*

After updating all necessary fields, click in the upper-right corner of the form.

The course language will then be added to the list.

Manage the course languages list

The list displays the following details for each course language:

- **Drag-and-drop :** Click this next to a course language to move it up or down the list, and the serial numbers will automatically update to reflect the new sequence.

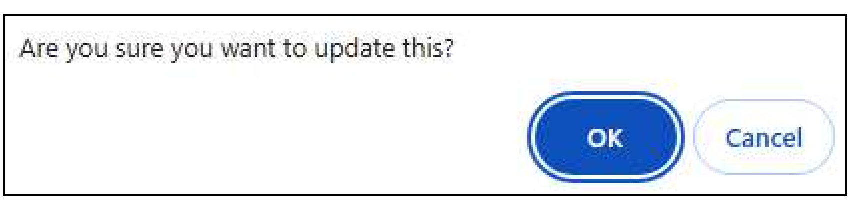
  The course languages will appear in the same order across all lists, including the teacher's selection menu and the front-end interface, where students can choose their preferred course language.

- **Sr. No:** The serial number.
- **Identifier:** This is the course language's system identifier, used to save data in the system and not displayed anywhere on the platform.
- **Name:** The course language name displayed throughout the platform and in the relevant lists.
- **Status:** Edit the status (activate or deactivate) of a course language as per your requirements using the toggle switch beside it, under the status column.

  Turn **on** the toggle switch beside the course language to activate it.

  Leave this **off** or turn it **off** to deactivate the course language.

  In both cases, a warning dialog box will appear for both actions, asking if you want to update the status or not.



  Click **Ok** to delete it or **Cancel** to abort the action.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

If the course language is linked to courses, an error message will appear, preventing its deactivation.

When you deactivate a course language, it will no longer appear in the list for teachers to select, nor will it be displayed on the front end for learners to choose when selecting a course.

Action buttons

Under the **Action** column, each entry includes two action buttons, allowing you to perform specific actions.

The functions of each button are explained in detail below:

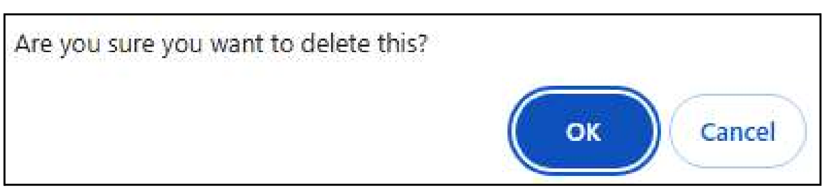
i. Edit

Click this to edit the course language's details. The [Course language setup]() form will appear. Update the fields, then click **Save changes**.

To close the form, click in the upper-right corner.

ii. Delete

Click this to delete the course language from the system. A confirmation message will appear.



Click **OK** to confirm the action or **Cancel** to abort it.

If the course language is linked to courses, an error message will appear, preventing the deletion.

Export course languages data

To export course languages data from this page, click **Export** from the upper-right corner.

The data will be downloaded as a `.csv` file (Comma-Separated Values), which can be used for backups or external purposes.

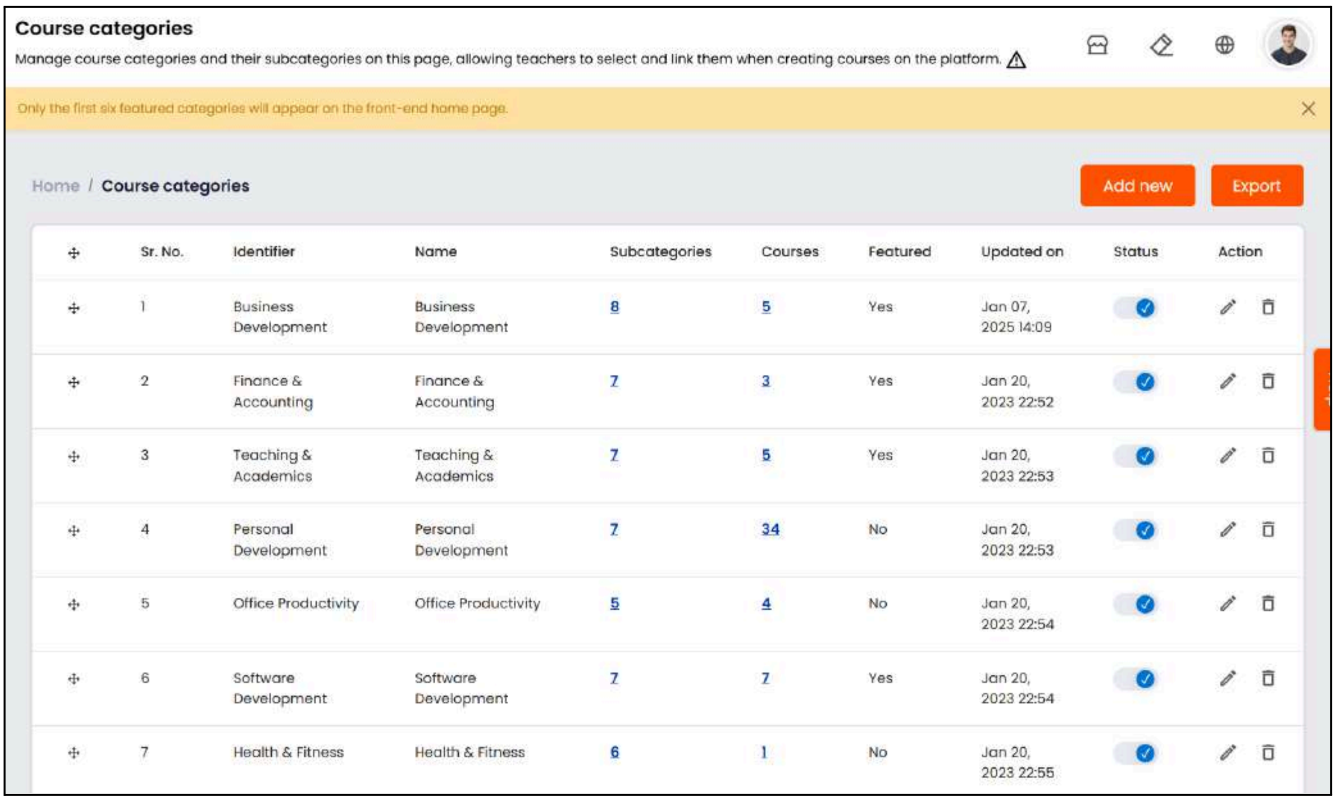
A success message will appear once the download is complete.

5.2 Course categories

The **Course categories** module allows you to manage the discussion topics, known as **categories** and **subcategories**, available on the platform.

As the admin, you define these topics, which teachers select when creating new courses. Learners can also search for courses based on these categories, enhancing course discoverability.

On this page, you can define and organize categories, add subcategories, rearrange the category order, and control which categories are featured on the front-end home page.



Sr. No.	Identifier	Name	Subcategories	Courses	Featured	Updated on	Status	Action
1	Business Development	Business Development	8	5	Yes	Jan 07, 2025 14:09		
2	Finance & Accounting	Finance & Accounting	7	3	Yes	Jan 20, 2023 22:52		
3	Teaching & Academics	Teaching & Academics	7	5	Yes	Jan 20, 2023 22:53		
4	Personal Development	Personal Development	7	34	No	Jan 20, 2023 22:53		
5	Office Productivity	Office Productivity	5	4	No	Jan 20, 2023 22:54		
6	Software Development	Software Development	7	7	Yes	Jan 20, 2023 22:54		
7	Health & Fitness	Health & Fitness	6	1	No	Jan 20, 2023 22:55		

The list will be empty if you just bought the platform and didn't choose to have dummy content provided by FATbit during the platform installation.

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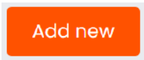
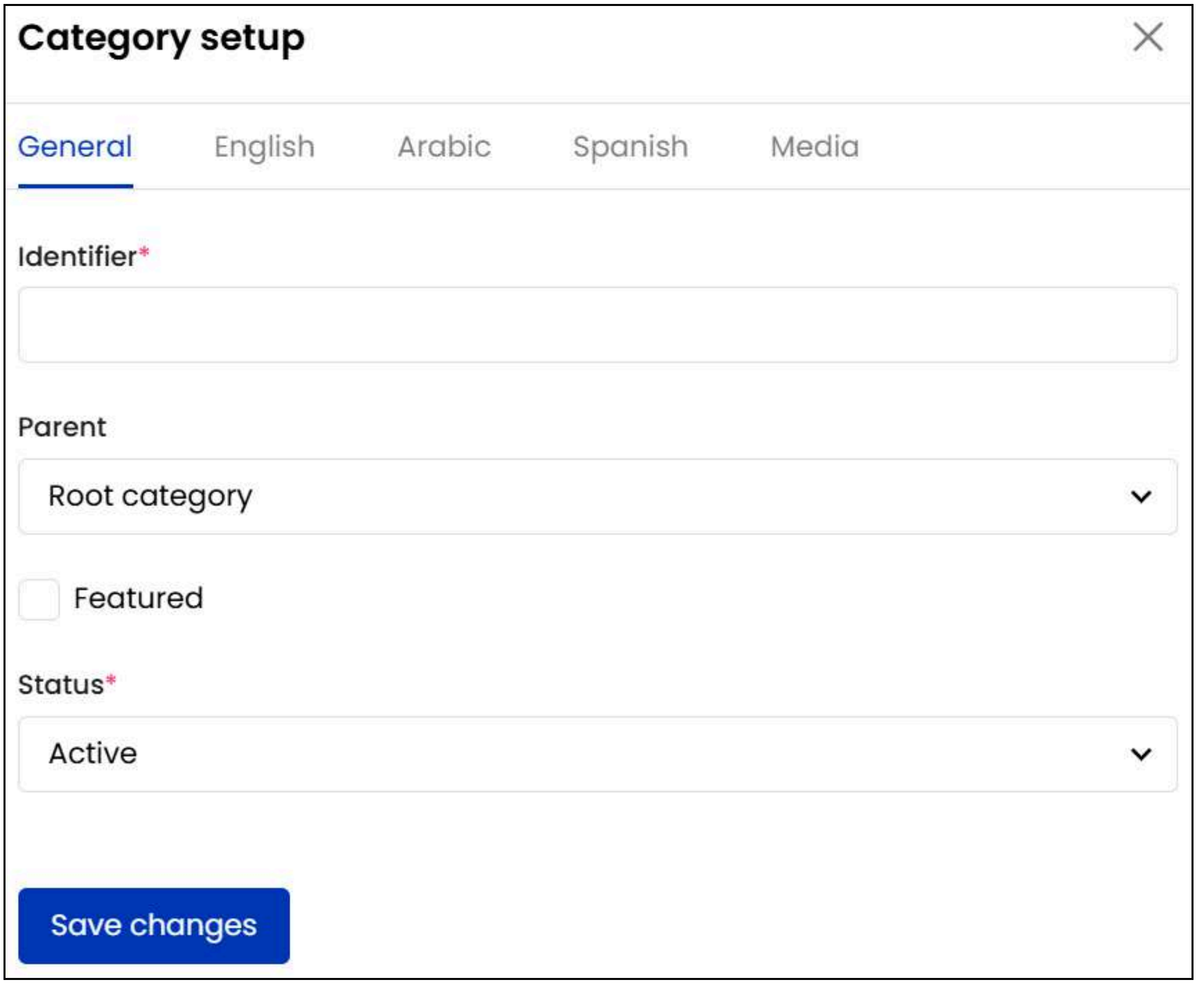
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

Add a course category

Click 

in the upper-right corner of the page to open the **Category setup** form.



This form contains multiple tabs: the [General]() tab, followed by the [Primary language]() tab. After that, you'll find the [Secondary language]() tabs, corresponding to the languages available on your platform. The last tab is the [Media]() tab.

Let's start with the **General tab**.

General tab

Update the following:

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- **Identifier*:** Enter a unique course category identifier. It can match the course category name, as defined under the Language data tabs (e.g., English, Arabic, Spanish).

  The identifier is used to save data in the system and will not be displayed anywhere on the platform. Ensure the identifier is unique; otherwise, an error message will appear.

- **Parent:** Select whether the category is a parent (root) category or a subcategory.

  If it's a subcategory, choose the parent category from the available list by clicking the field and selecting the appropriate option from the dropdown.

  If it's a parent category, select "**Root category**" from the dropdown list.

- **Featured:** Check this box to mark the category as featured, making it visible on the platform's front-end homepage (image below).

  Deselect or leave it unchecked to exclude it from the featured categories.

  Only the first six featured categories will be displayed on the front-end homepage (as shown in the image above).

- **Status:** Select the status of the course category.

  Click the field and select "**Active**" to publish it on the platform, enabling it to be linked to courses.

  Select "**Inactive**" to temporarily hide the course category; it will not appear in the course category dropdown lists across the platform, preventing teachers from linking courses to it.

Once done, click **Save changes**.

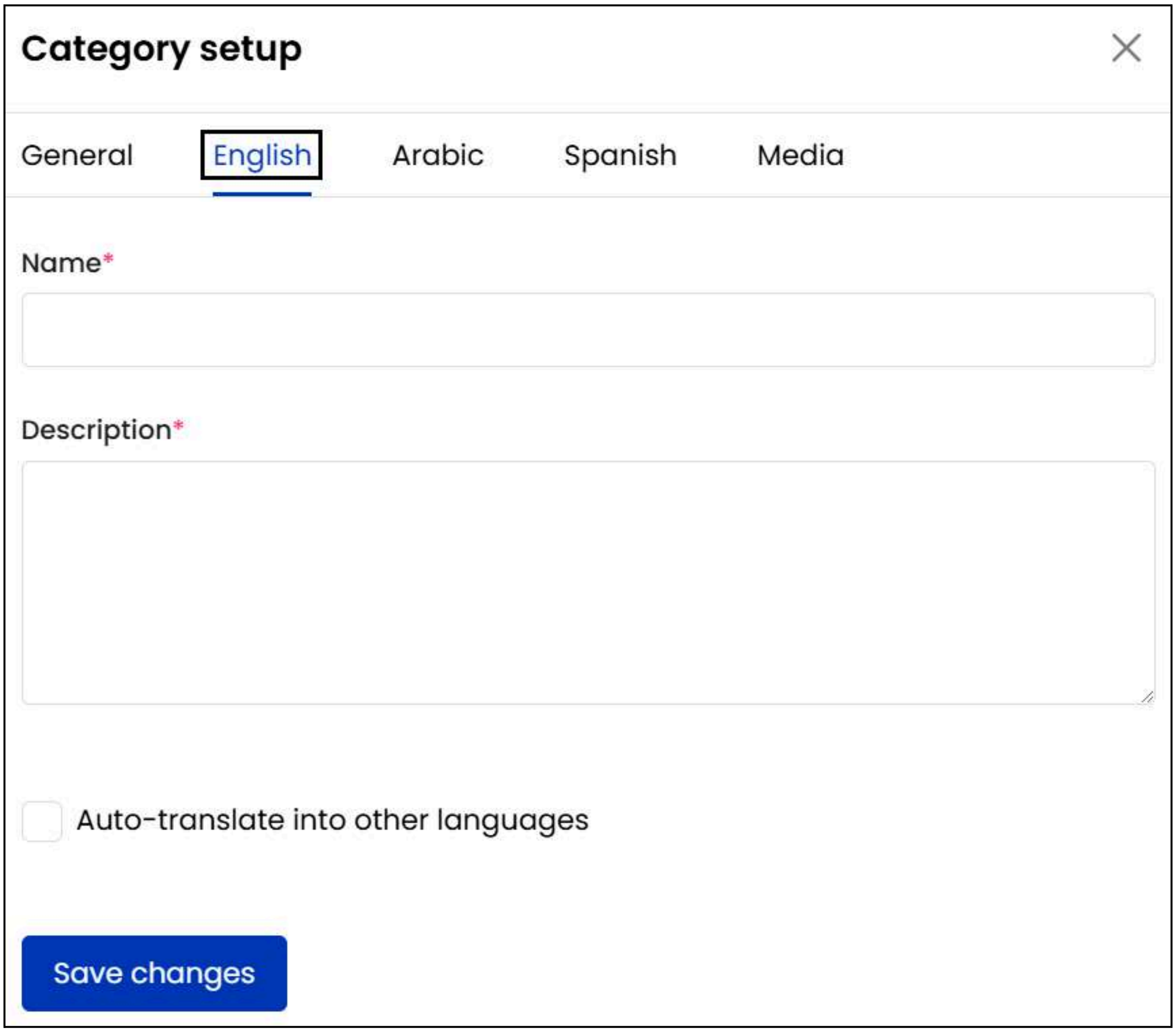
This will direct you to the next tab, which is the primary language tab (English tab).

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

English tab

This is the primary language tab, and completing this tab is mandatory for publishing the course category on the platform.

Since English is set as the primary language, this tab is labeled **English**.



Update the following:

- **Name*:** Enter the course category name in the primary language.

  This name will be displayed to both teachers and learners under the course categories list.

- **Auto-translate into other languages:** Check mark this to automatically update the secondary language(s) data.

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The data in the subsequent language tab(s) will be auto-filled.

*This feature is available only if the **Microsoft translator API** is configured under **Settings > System configurations > Third-party APIs**.*

If you prefer to manually fill in the secondary language(s) data, leave the checkbox unselected.

Once done, click **Save changes**.

The next tab(s) will be the secondary language tab(s) (Arabic, Spanish, etc.), which include the same fields as the English tab. Edit the details as needed and save.

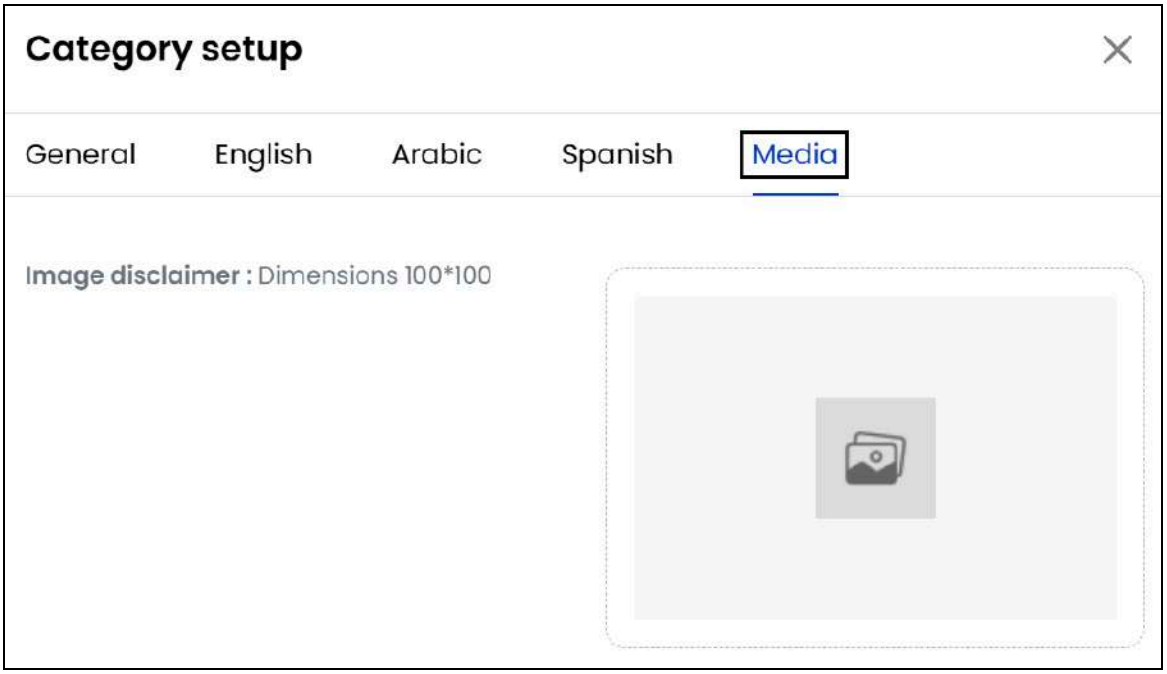
*If you had selected the auto-translate option, the secondary language tab(s) will be prefilled. Review the data, make any necessary edits, click **Save changes**, and move to the [Media](#) tab.*

*If you did not use the auto-translate feature earlier, use the **Auto-translate & fill language data** button beside the **Save changes** button on each secondary language tab to auto-fill the secondary language fields. Then, click **Save changes**, and move to the next tab.*

*If you do not want to fill the secondary language tab(s) at this time, complete only the primary language tab (English tab), click **Save changes**, and move to the [Media](#) tab.*

Media tab

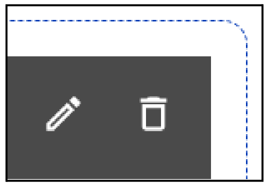
The final tab, following all the secondary language tabs, is the **Media** tab. Click this tab to access it, and update the course category's thumbnail image.



To upload it, hover over the image field.

Click . Select the image from your system, click **Open** and it will be uploaded.

After uploading the image, hovering over the image field reveals two buttons.



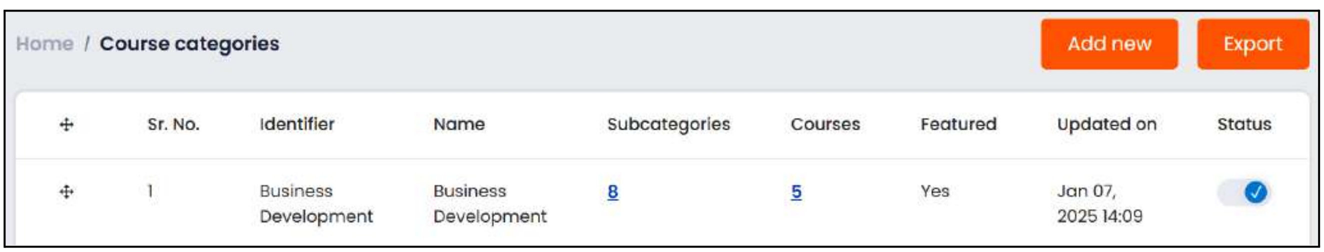
To edit the image again (change it), hover over the image field, click , select the image from your system and upload it.

To delete the image, hover over the image field and click .

*When you upload the image, it is saved automatically in the system, so no **Save changes** button is provided under this tab.*

After completing the process, click to close the form. The course category will then be added to the list.

Manage the course categories list



The list displays the following details for each course category:

- **Drag-and-drop :** Click this next to a course category to move it up or down the list, and the serial numbers will automatically update to reflect the new sequence.

  The course categories will appear in the same order across all lists, including the teacher's selection menu and the front-end interface, where students can choose their preferred course category.

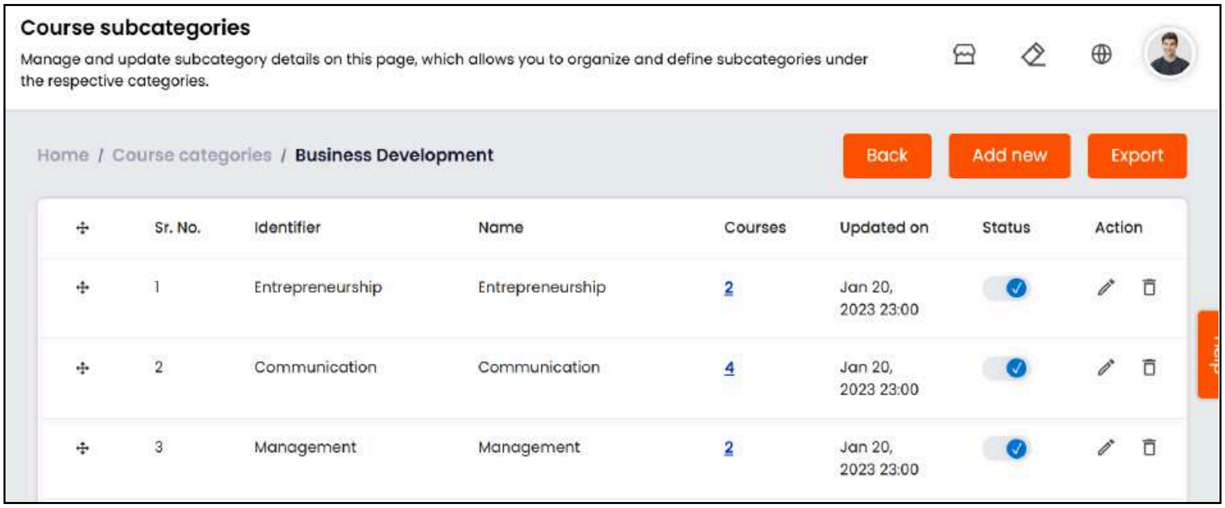
- **Sr. No:** The serial number.

- **Identifier:** This is the course category's system identifier, used to save data in the system and not displayed anywhere on the platform.

- **Name:** The course category name displayed throughout the platform and in the relevant lists.

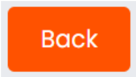
- **Subcategories:** This number represents the total subcategories listed under the category.

  It is a clickable link that directs you to the respective **course subcategories** page.



All features on this page mirror those on the Course categories page, except for the **subcategories** column, as a subcategory cannot have another subcategory on the Yo!Coach platform.

The remaining features are the same, including the columns, **action buttons**, **export option**, and the ability to **add new items**.

Once you're finished, click 

to return to the Course categories page, or use the **Course categories** link in the breadcrumbs at the top of the page.

Alternatively, navigate back to the **Course categories** page by selecting the submodule from the navigation panel.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
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- **Courses:** This number represents the total number of courses linked to the category. It is a clickable link that directs you to the All courses page, where all courses linked to this category are listed.

  All features on this page mirror those on the All courses page. For more details on the available actions and information, please refer to the All courses section in the manual.

  Note that to return to the Course categories page from the All courses page, you will need to select Course categories from the navigation menu.

- **Featured:** This indicates whether the course category is marked as featured. "**Yes**" means the category is featured, while "**No**" means it is not.

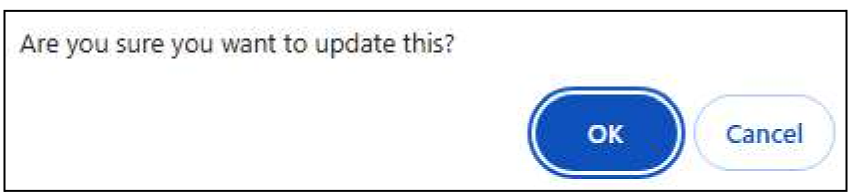
- **Updated on:** The date and time the course category details were last updated.

- **Status:** Edit the status (activate or deactivate) of a course category as per your requirements using the toggle switch beside it, under the status column.

  Turn **on** the toggle switch beside the course category to activate it.

  Leave this **off** or turn it **off** to deactivate the course category.

  In both cases, a warning dialog box will appear for both actions, asking if you want to update the status or not.



  Click **Ok** to delete it or **Cancel** to abort the action.

  If the course category is linked to courses, an error message will appear, preventing its deactivation.

When you deactivate a course category, it will no longer appear in the list for teachers to select, nor will it be displayed on the front end for learners to choose when selecting a course.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

Action buttons

Under the **Action** column, each entry includes two action buttons, allowing you to perform specific actions.

The functions of each button are explained in detail below:

i. Edit

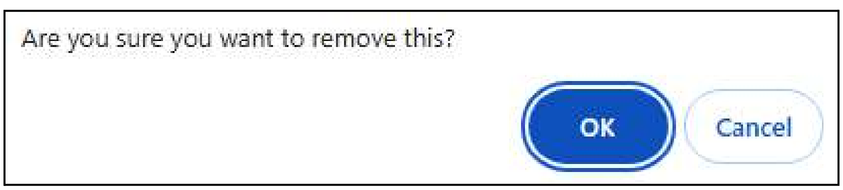
Click this to edit the course category's details. The [Category setup] form will appear.

Update the fields, then click **Save changes**.

To close the form, click in the upper-right corner.

ii. Delete

Click this to delete the course category from the system. A confirmation message will appear.



Click **OK** to confirm the action or **Cancel** to abort it.

If the course category is linked to courses, an error message will appear, preventing the deletion.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

Export course categories data

To export course categories data from this page, click **Export** from the upper-right corner.

The data will be downloaded as a `.csv` file (Comma-Separated Values), which can be used for backups or external purposes.

A success message will appear once the download is complete.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

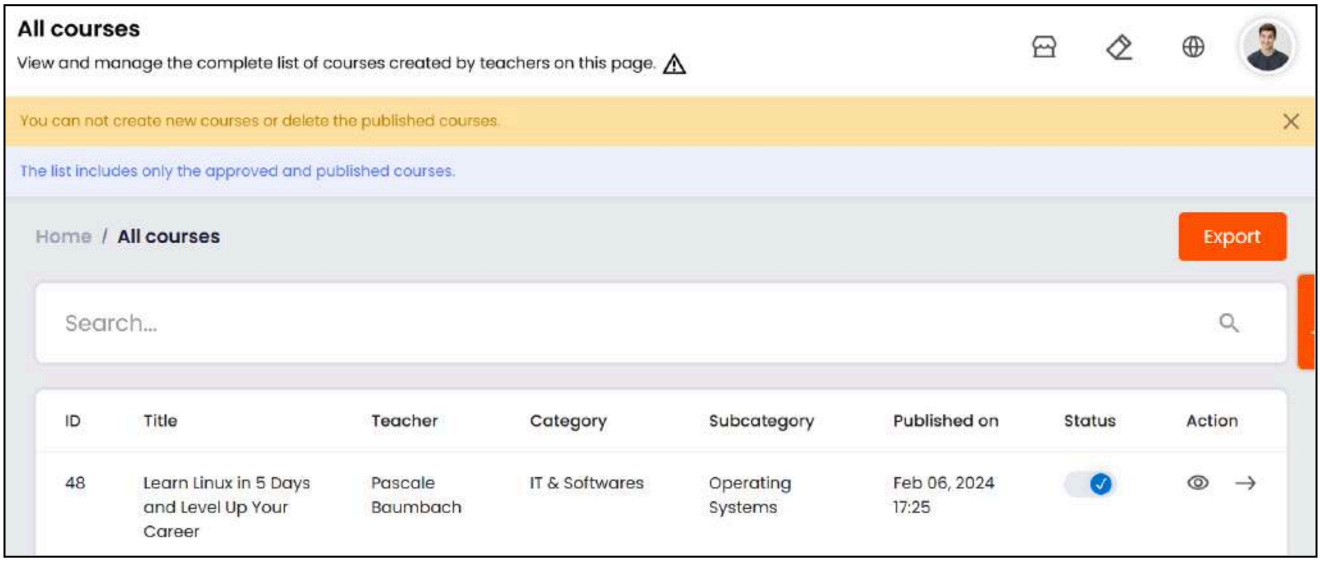
5.3 All courses

When the courses feature is activated, teachers can create structured programs designed to teach specific knowledge or skills. A course includes objectives and pre-recorded instructional content that teachers can upload on the platform and earn revenue from the same.

As an admin, you cannot create courses, but you can manage course-related settings under **Settings > System configurations >** Courses These settings define how courses function on the platform and allow you to configure key parameters.

Every course created by a teacher requires your approval before it can be published. You can review all submitted courses under **Courses >** Course requests and either approve or reject them. Once a course is published or declined, its status cannot be changed, but published courses can be deactivated if needed.

All approved courses are listed in this submodule.



The list will be empty if you just bought the platform and didn't choose to have dummy content provided by FATbit during the platform installation.

Manage the all courses list

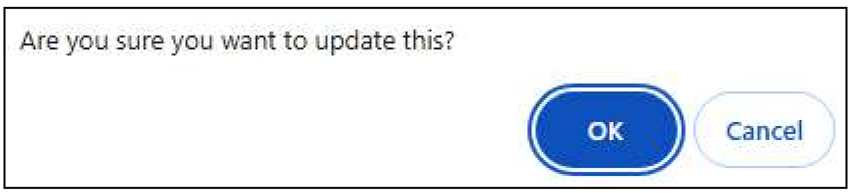
The list displays the following details for each course:

- **ID:** The unique course ID.
- **Title:** The course title, as visible everywhere on the platform including the front-end.
- **Teacher:** The name of the teacher who created and is teaching the course.
- **Category:** The category to which this course belongs.
- **Subcategory:** The subcategory to which this course belongs.
- **Published on:** The date and time the course was published on.
- **Status:** Edit the status (activate or deactivate) of a course as per your requirements using the toggle switch beside it, under the status column.

  Turn **on** the toggle switch beside the course to activate it.

  Leave this **off** or turn it **off** to deactivate the course.

  In both cases, a warning dialog box will appear for both actions, asking if you want to update the status or not.



Click **Ok** to delete it or **Cancel** to abort the action.

When you deactivate a course, teachers cannot reactivate it unless you do so.

Action buttons

Under the **Action** column, each entry includes two action buttons, allowing you to perform specific actions.

The functions of each button are explained in detail below:

i. View

Click the button beside a course and a drawer will appear displaying the **Course details,** including its basic details and other details.

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Course detail

Basic details

Title	Technical Analysis MasterClass:Trading By Technical Analysis
Subtitle	Stock Market Technical Analysis Secrets for Forex , Stock Trading , Options , Swing
Teacher name	Lydia Deckow
Duration	9h 54m
Category	Marketing
Subcategory	Marketing Fundamentals
Level	Expert
Course language	English
Status	Published
Price	$928.00
Published on	Dec 03, 2024 21:13
Sections	13

The basic details include:

- **Title:** The full title of the course, describing its primary focus.
- **Subtitle:** A short description or additional information about the course.
- **Teacher name:** The name of the teacher who created and is teaching the course.
- **Duration:** The total length of the course, shown in hours and minutes.
- **Category:** The category or primary subject area to which the course belongs.
- **Subcategory:** A more specific topic under the main category that the course falls under.
- **Level:** The difficulty or expertise level required for the course.
- **Course language:** The language used in the course.

- **Status:** The current state of the course, such as published or draft. Since only the published courses are listed under this list, the status will always appear as published here.
- **Price:** The cost of enrolling in the course, shown in the default currency.
- **Published on:** The date and time when the course was made available to learners.
- **Sections:** The total number of sections or modules included in the course.

Lectures	89
Reviews	0
Learners	0
Certificate	Yes
Average rating	0.00
Course certification type	Achievement certificate
Quiz name	Skills and Problem Solving Test

Other details

Preview video	View
Description	Gain the ability to Make Money in Stock market, commodity,Forex, cryptocurrency and other tradable instruments using Technical Analysis, the Safest way by taking this course! Get your

- **Lectures:** The total number of lessons or lectures provided in the course.
- **Reviews:** The number of reviews or feedback provided by learners.
- **Learners:** The total number of users (learners) who have enrolled in the course.
- **Certificate:** This defines whether completing the course provides a certificate. "**Yes**" means a certificate will be issued, while "**No**" means no certificate will be issued.
- **Average rating:** The average star rating assigned to the course based on all reviews received to date.
- **Course certificate type:** This specifies the type of certificate awarded upon course completion. This option is visible only if the teacher has selected that a certificate will be provided. The options include:

- ○ **Completion certificate:** Awarded when the course is completed.
- ○ **Achievement certificate:** Awarded once the learner completes the course and passes the final quiz. If they score well on the quiz, they will receive this certificate.

- **Quiz name:** The name of the quiz included in the course. This option is visible only if the course certificate type is "**Achievement certificate**."

The other details include:

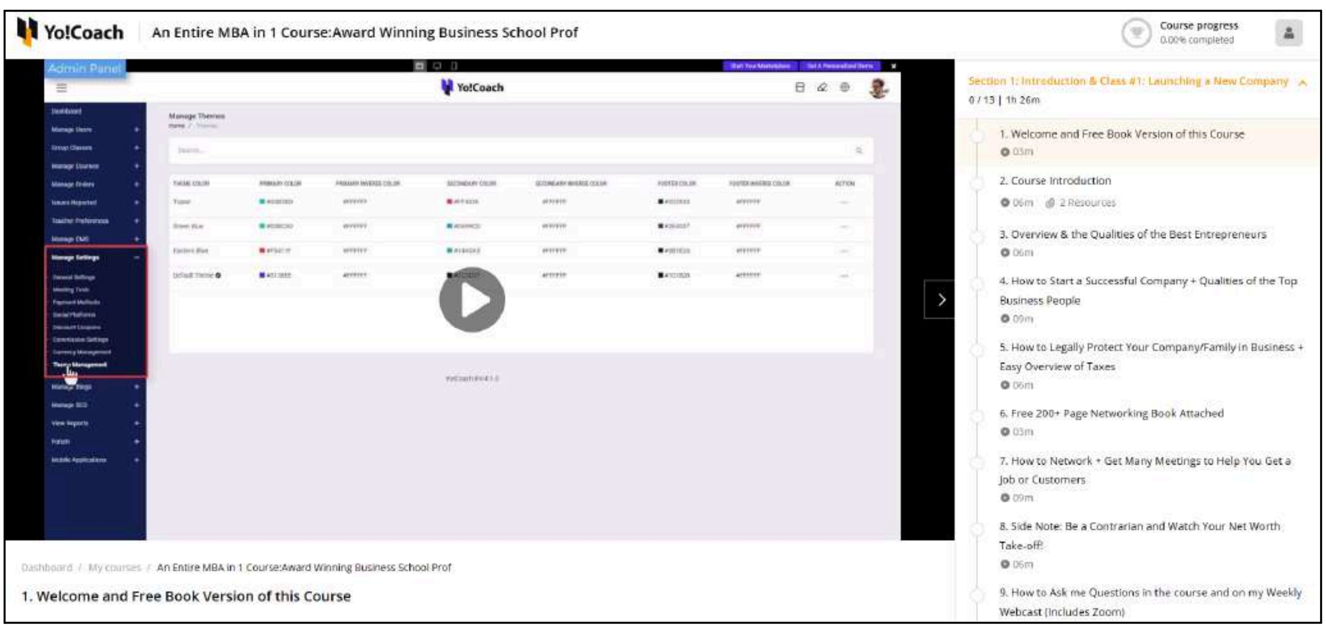
- **Preview video:** A link to a short video that provides an overview or introduction to the course. Click View to open the video in a new tab and preview the course.

- **Description:** A detailed explanation of the course objectives, topics covered, and its target audience.

Since you can only review the details, review them and then click ✕ in the upper-right corner of the drawer to close it.

ii. Preview →

Click this button to view the course as a learner. The course will open in a new tab (as shown below).



<u>**DISCLAIMER:**</u> The color theme and labels may differ in the screenshots compared to those on the platform.
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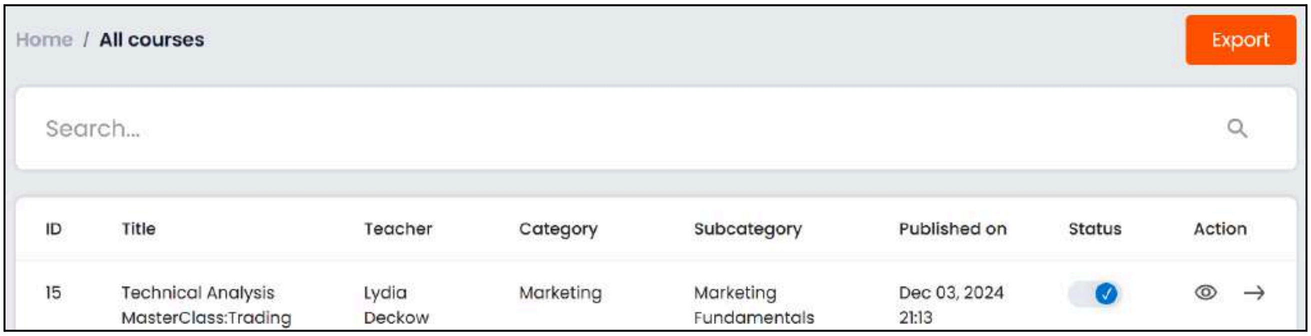
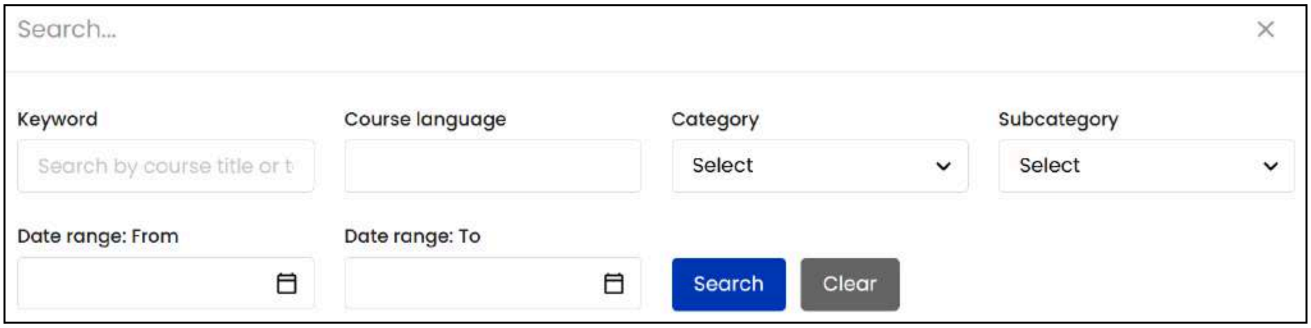
Search for a course

Use the search functionality at the top of the list to find a specific course.



Click the search bar or to expand it. Click or the search bar again to collapse the section.



There are several filters that help narrow down the search. Each field is explained below:

- **Keyword:** Enter the course name or the teacher's name in this field.
- **Course language:** Enter the language of the course. Place the cursor in the field and start typing. As you type, a list of matching results will appear.

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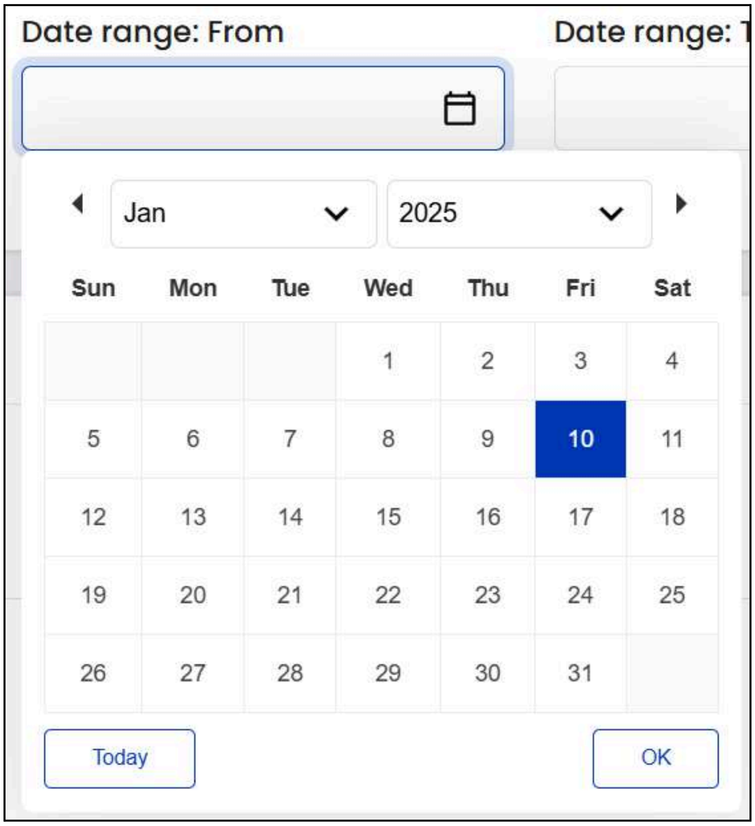
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

Select the applicable option.

- **Date range: From:** To view the courses published on a specific date, select the desired date in this field.

  To filter courses that were published within a date range, select the start date by clicking the field. A calendar will appear; choose the date, and it will be added to the field.



  Use the **Today** button to select today's date and **Ok** to close the calendar.

- **Date range: To:** Select the end time of the range in this field.

  *The **Date range: From** value must always be an earlier date, and the **Date range: To** value must be later than the date selected in the **Date range: From** field.*

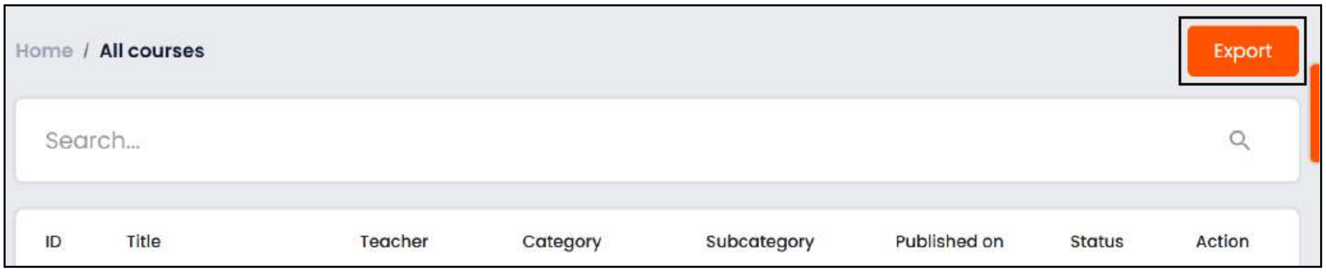
  *For example, if the **Date range: From** is 09/24/2020, the **Date range: To** must be a date after this, such as 09/25/2020 or any future date. If incorrect dates are entered, no results will be displayed in the list.*

Search for a course by filling in a single field or multiple fields. To view the courses published within a specific date range, use the date fields.

After filling in the desired fields, click **Search** to display the results. Click **Clear** to reset all fields and start a new search.

Export all courses data

To export the all courses data from this page, click **Export** from the upper-right corner.



The data will be downloaded as a `.csv` file (Comma-Separated Values), which can be used for backups or external purposes.

A success message will appear once the download is complete.

To export specific courses data, use the [search bar] to apply the necessary filters and define the criteria.

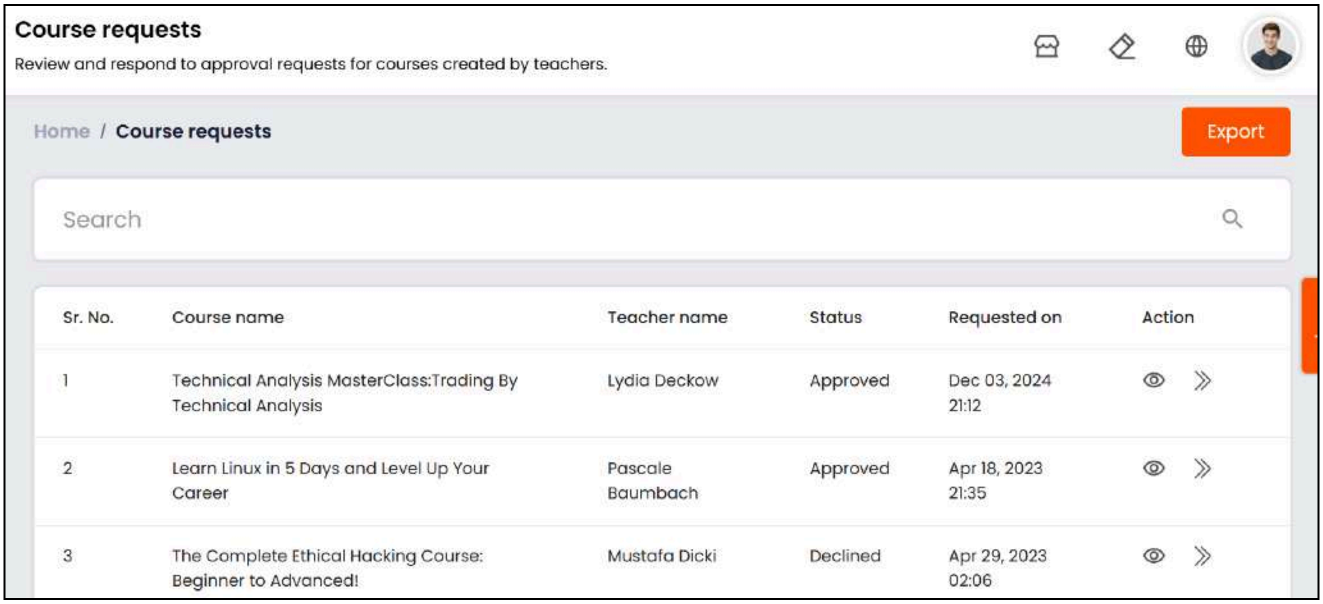
After setting the filters and clicking **Search** to view the results, click **Export** to download the filtered data as a `.csv` file.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

5.4 Course requests

With the course feature enabled, teachers can create courses but require your approval before they can be published. After entering the necessary course details, teachers submit their course requests for your review.

This submodule allows you to manage all course requests submitted by teachers.



The list will be empty if you just bought the platform and didn't choose to have dummy content provided by FATbit during the platform installation.

By default, every request will have the "**Pending**" status.

Review each request and approve or decline it. Once approved, the request will be added to the All courses list.

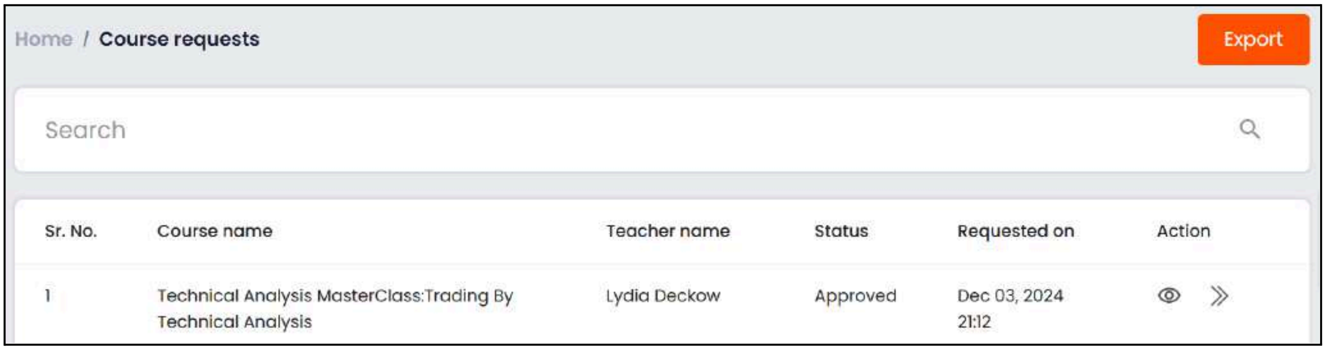
If a course is declined, teachers can revise the course and resubmit it for approval.

Kindly note that once a course is approved or declined, its status cannot be changed.

An approved request cannot be deleted or declined; the course can only be deactivated from the All courses list. And a declined course request cannot be retrieved.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

Manage the course requests list



The list displays the following details for each course request:

- **Sr. No.:** The serial number.
- **Course name:** The title of the course submitted for approval.
- **Teacher name:** The name of the teacher who created the course.
- **Status:** The current status of the course request:
    - **Approved:** Indicates that the course has been approved. Approved courses can also be found under the All courses submodule.
    - **Declined:** Indicates that the course approval request has been declined.
    - **Pending:** Indicates that the course approval request is awaiting review.
- **Requested on:** The date and time when the course request was submitted.

Action buttons

Under the **Action** column, each entry displays two or three buttons, depending on its status.

Requests that have not yet been reviewed and their status has not been updated (neither accepted nor declined) will have three buttons.

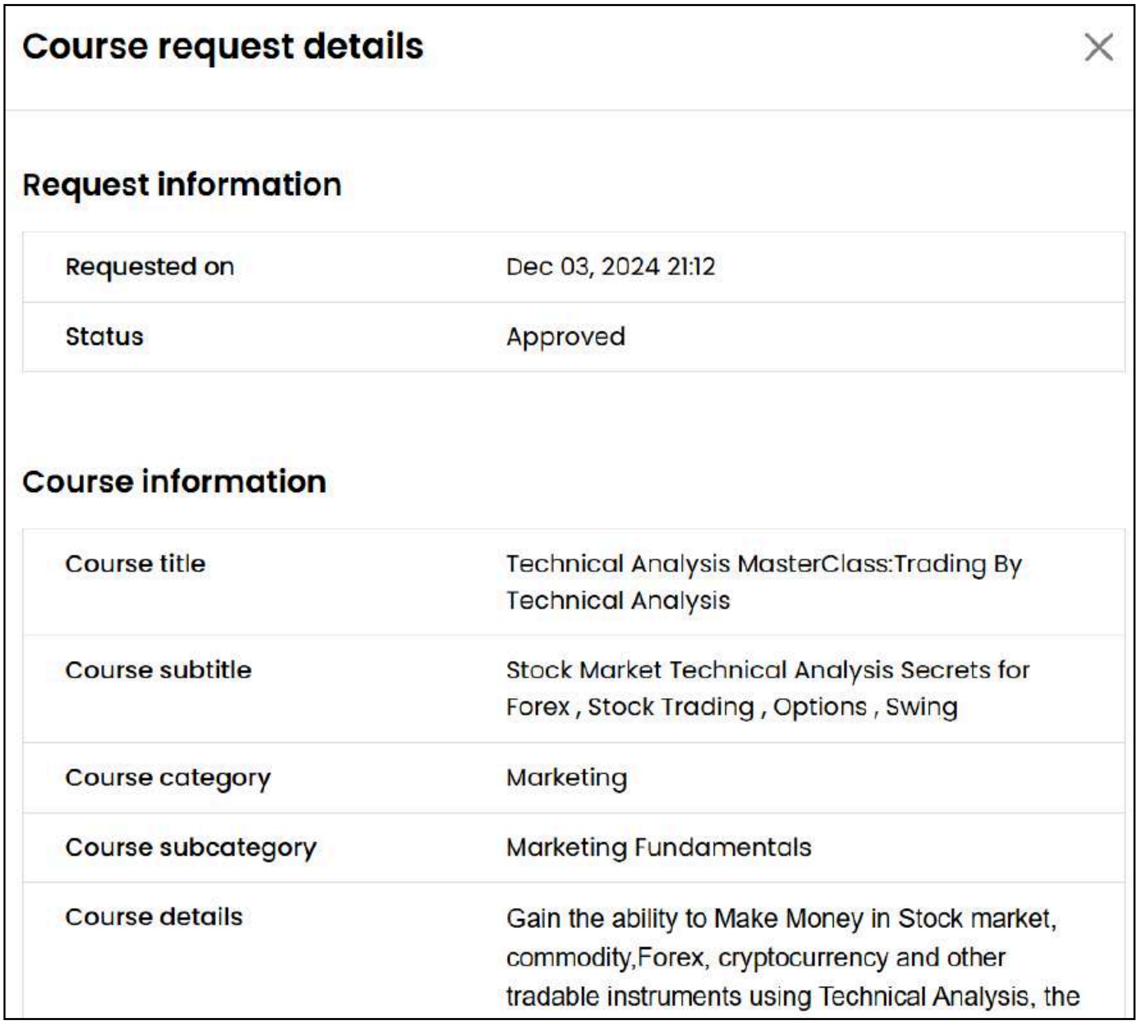
Requests with a finalized status—either approved or declined—will have only two buttons.

The function of each button is described in detail below.

i. View

Click the button beside a course request to review the details and make your decision accordingly.

A drawer will appear, displaying the details of the course request, including the request information, course information and profile information.



The request information includes:

- **Requested on:** The date and time when the course request was submitted.
- **Status:** The current approval status of the course (e.g., approved, pending, declined).

The course information includes:

- **Course title:** The full title of the course.

<u>**DISCLAIMER:**</u> The color theme and labels may differ in the screenshots compared to those on the platform.
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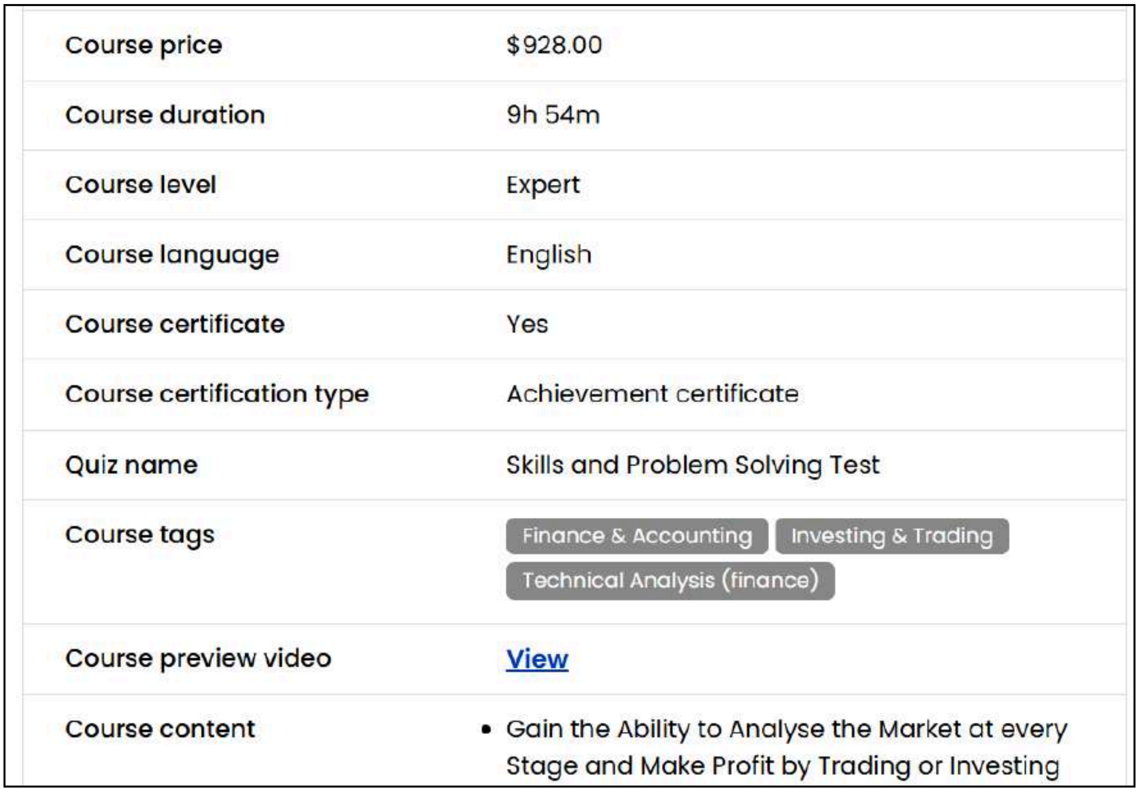
- **Course subtitle:** A short description or additional information about the course.
- **Course category:** The primary subject or topic of the course.
- **Course subcategory:** A more specific topic under the main category.
- **Course details:** A description of the course objectives, topics, and benefits.



Course price	$928.00
Course duration	9h 54m
Course level	Expert
Course language	English
Course certificate	Yes
Course certification type	Achievement certificate
Quiz name	Skills and Problem Solving Test
Course tags	Finance & Accounting; Investing & Trading; Technical Analysis (finance)
Course preview video	View
Course content	• Gain the Ability to Analyse the Market at every Stage and Make Profit by Trading or Investing

- **Course price:** The cost of the course.
- **Course duration:** The total length of the course in hours and minutes.
- **Course level:** The difficulty level of the course (e.g., beginner, intermediate, expert).
- **Course language:** The primary language in which the course is delivered.
- **Course certificate:** Indicates whether the course offers a certificate upon completion. "**Yes**" means a certificate will be issued, while "**No**" means no certificate will be issued.
- **Course certificate type:** This specifies the type of certificate awarded upon course completion.

  This option is visible only if the teacher has selected that a certificate will be provided. The options include:

- Completion certificate: Awarded when the course is completed.
- **Achievement certificate:** Awarded once the learner completes the course and passes the final quiz. If they score well on the quiz, they will receive this certificate.

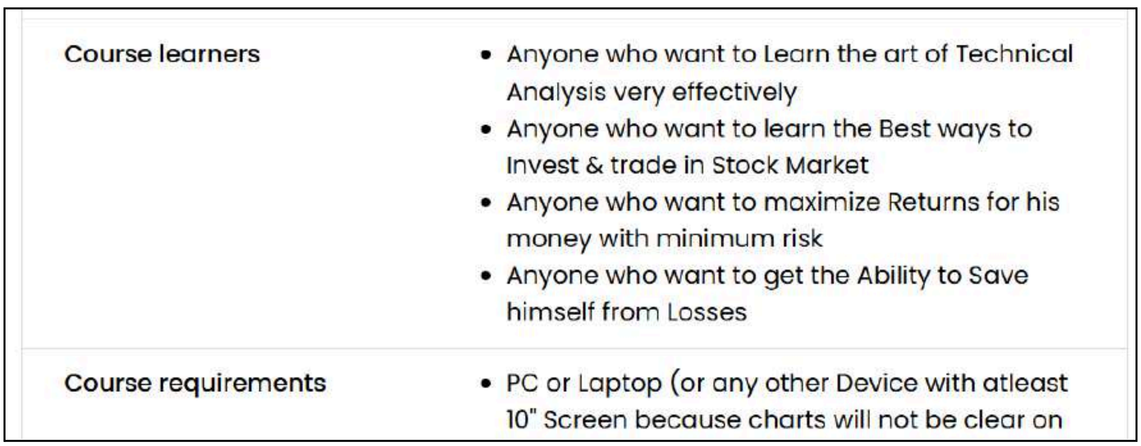
- **Quiz name:** The name of the quiz included in the course. This option is visible only if the course certificate type is "**Achievement certificate**."

- **Course tags:** Tags associated with the course topics.

  Course tags are keywords or labels that categorize and describe a course. They help improve course discoverability, allowing learners to easily find relevant courses based on specific topics or skills.

- **Course preview video:** A link to a short video that provides an overview or introduction to the course. Click View to open the video in a new tab and preview the course.

- **Course content:** Specifies the content of the course including the topics covered, assignments, learning approach, etc.



Course learners	• Anyone who want to Learn the art of Technical Analysis very effectively • Anyone who want to learn the Best ways to Invest & trade in Stock Market • Anyone who want to maximize Returns for his money with minimum risk • Anyone who want to get the Ability to Save himself from Losses
Course requirements	• PC or Laptop (or any other Device with atleast 10" Screen because charts will not be clear on

- **Course learners:** Specifies the target audience, that is, who the course is intended for.

- **Course requirements:** Specifies the technical requirements, like the devices or tools required and any additional prerequisites or accounts needed.

The profile information includes:

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
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The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

Profile information

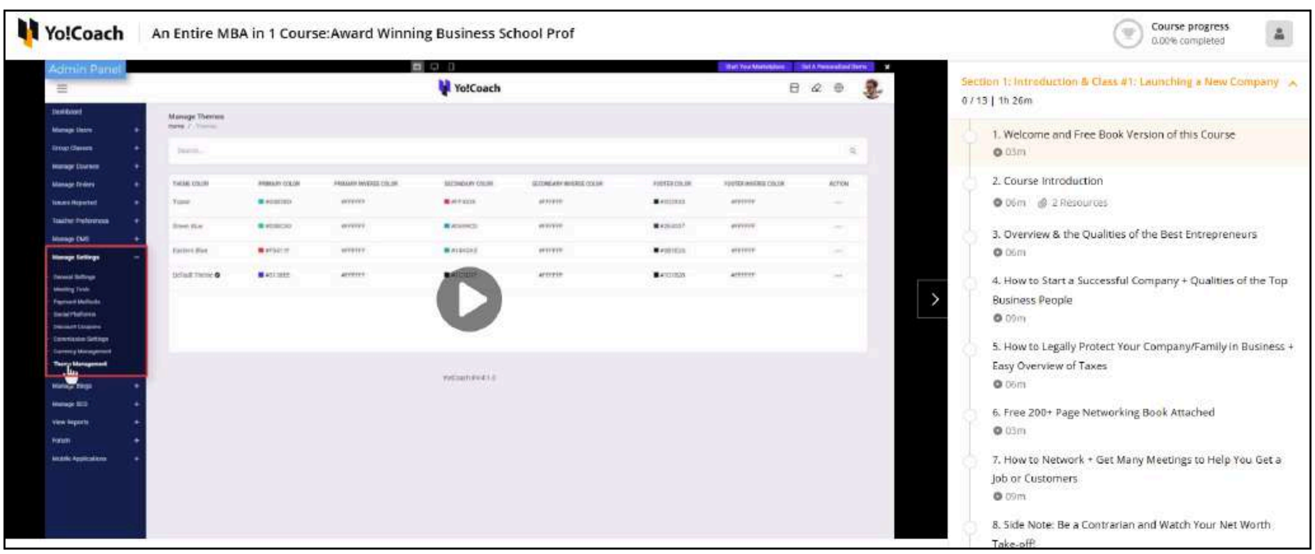
First name	Lydia
Last name	Deckow
Gender	Female
Email	lydia.deckow@dummyid.com

- **First name:** The teacher's first name.
- **Last name:** The teacher's last name.
- **Gender:** The teacher's gender.
- **Email:** The teacher's email address.

Review the details, then click × in the upper-right corner of the drawer to close it.

ii. Preview »

Click this button to view the course as a learner. The course will open in a new tab (as shown below).

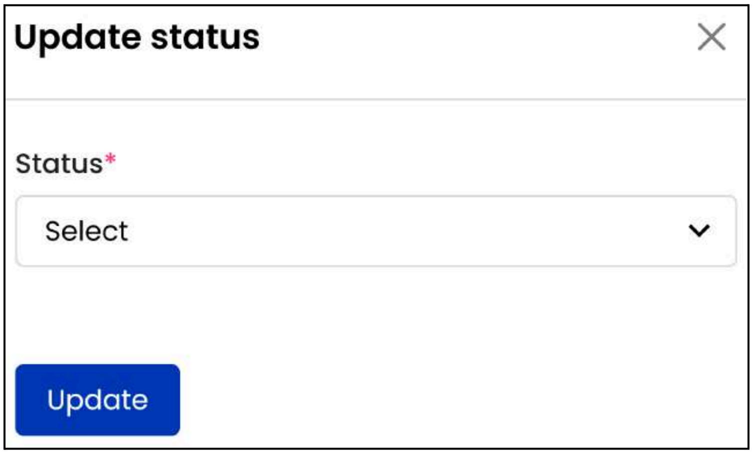


DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

iii. Change status

This button is visible only for course requests with a pending status. It does not appear for requests that have been approved or declined. Once a request is approved or declined, the button disappears, preventing any further changes to your decision.

Click the button to open the **Update status** form.



Update the following:

- **Status*:** Use the dropdown list to select the status of the course request. The available options are:
    - Approved: Select this option to approve the course request.
    - Decline: Select this option to decline the course request.

If you select **Declined**, an additional field will appear:

<u>**DISCLAIMER:**</u> The color theme and labels may differ in the screenshots compared to those on the platform.
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The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

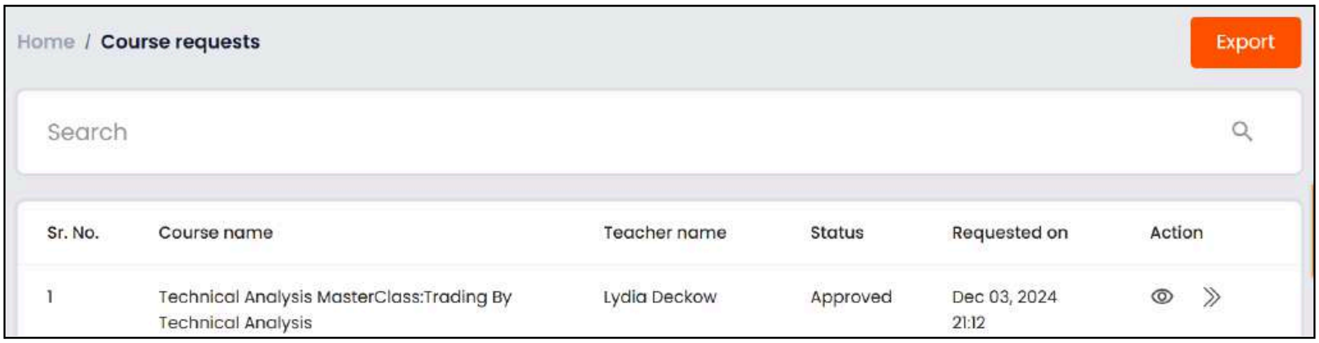
- **Comment*:** Provide the reason for declining the course request in this field.

After selecting the status, click **Update** to save the changes.

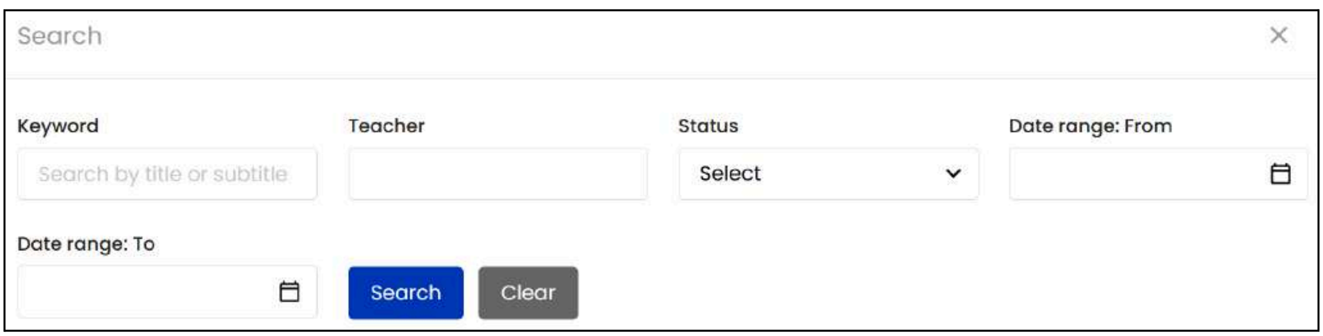
To update the status later, close the form by clicking in the upper-right corner.

Search for a course request

Use the search functionality at the top of the list to find a specific course request.



Click the search bar or to expand it. Click or the search bar again to collapse the section.



There are several filters that help narrow down the search. Each field is explained below:

- **Keyword:** Enter the course request via its title or subtitle.
- **Teacher:** Enter the name of the teacher in this field.

  Place the cursor in the field and start typing. As you type, a list of matching results will appear.

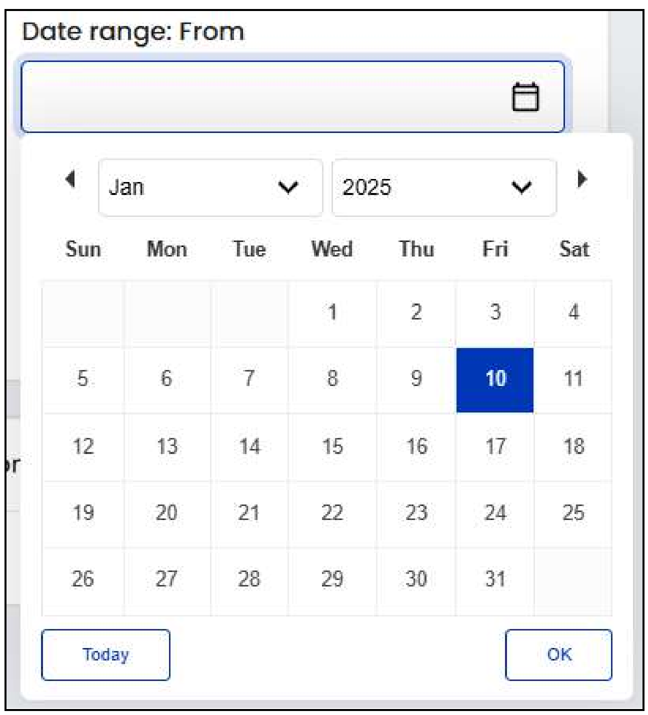
DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

Select the applicable option.

- **Status:** Select the status of the course request from the dropdown list:
  - Pending
  - Approved
  - Declined
- **Date range: From:** To view the course requests placed on a specific date, select the desired date in this field.

  To filter course requests placed within a date range, select the start date by clicking the field.

  A calendar will appear; choose the date, and it will be added to the field.



DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

Use the **Today** button to select today's date and **Ok** to close the calendar.

- **Date range: To:** Select the end time of the range in this field.

*The **Date range: From** value must always be an earlier date, and the **Date range: To** value must be later than the date selected in the **Date range: From** field.*

*For example, if the **Date range: From** is 09/24/2020, the **Date range: To** must be a date after this, such as 09/25/2020 or any future date. If incorrect dates are entered, no results will be displayed in the list.*

Search for a course request by filling in a single field or multiple fields. To view the course requests placed within a specific date range, use the date fields.

After filling in the desired fields, click **Search** to display the results. Click **Clear** to reset all fields and start a new search.

Export all course requests data

To export the all course requests data from this page, click **Export** from the upper-right corner.

The data will be downloaded as a `.csv` file (Comma-Separated Values), which can be used for backups or external purposes. A success message will appear once the download is complete.

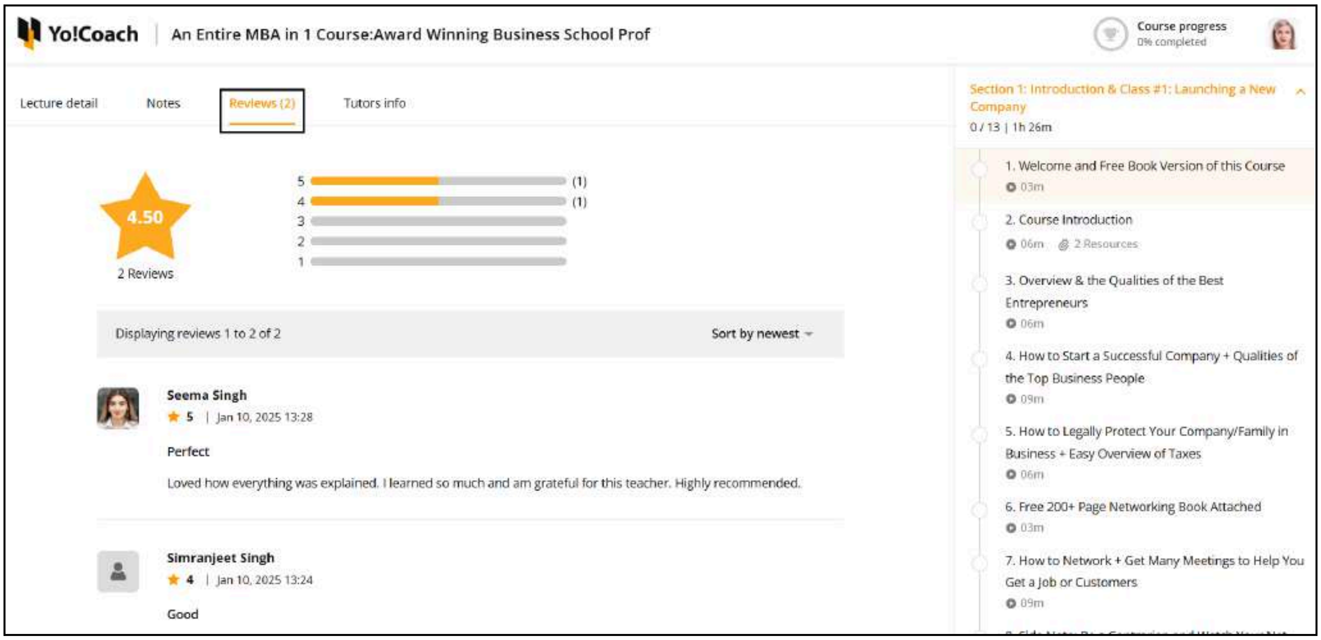
To export specific course requests data, use the [search bar](#) to apply the necessary filters and define the criteria.

After setting the filters and clicking **Search** to view the results, click **Export** to download the filtered data as a `.csv` file.

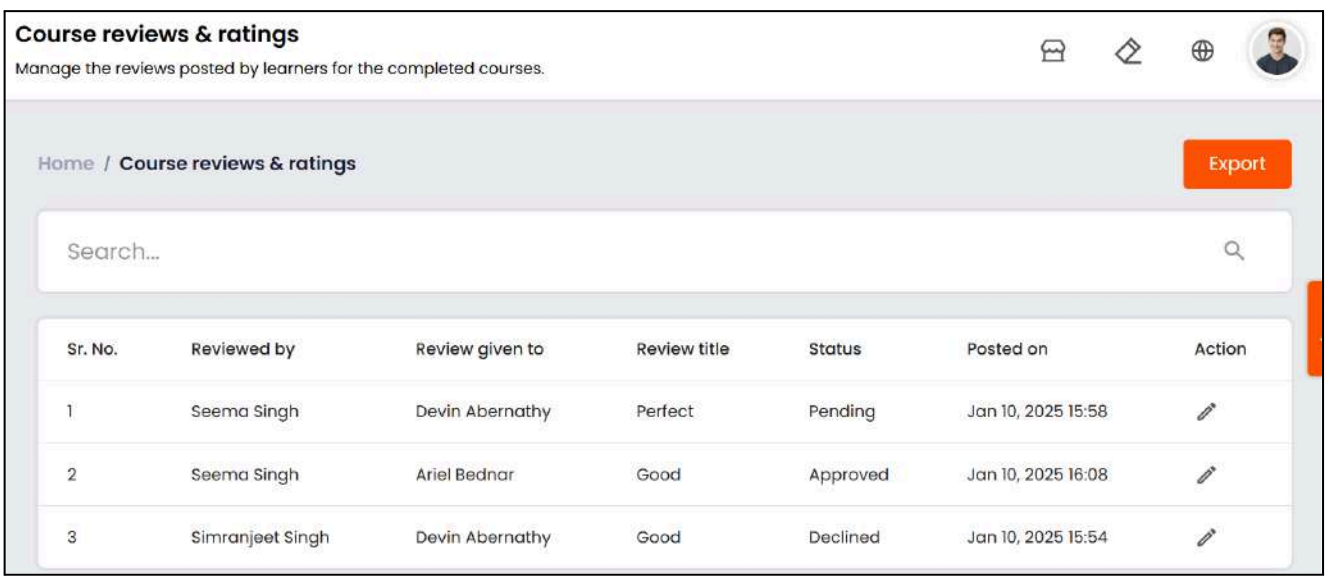
5.5 Course reviews & ratings

This submodule enables you to manage reviews and ratings submitted by learners for courses they have purchased and completed.

These reviews, visible on the **Course details page** at the front-end, provide valuable feedback and help potential learners make informed decisions.



Every review and rating posted will be listed on this page.



<u>**DISCLAIMER:**</u> The color theme and labels may differ in the screenshots compared to those on the platform.
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The list will be empty if you just bought the platform and didn't choose to have dummy content provided by FATbit during the platform installation.

Control learner reviews by adjusting the settings and defining the default review status under **Settings > System configurations >** System.

Note that this default review status affects both course reviews & ratings and teacher reviews & ratings.

You can set the default status of reviews to one of the following:

- **Approved:** Reviews are automatically published on the platform and marked as "approved" in this list.
- **Pending:** Reviews require your review before being published. You must approve them to publish or decline them to prevent publication. Declined reviews will not appear on the front end.

The status of a review can be updated at any time. For example, if a review is initially marked as declined, you can change its status later. However, the content of the review or the rating cannot be modified.

Manage the course reviews & ratings list

The list displays the following details for each course review & rating:

- **Sr. No.:** Serial number
- **Reviewed by:** The name of the user (learner) who submitted the review.
- **Review given to:** The name of the user (teacher) who received the review.
- **Review title:** The comments provided in the review.

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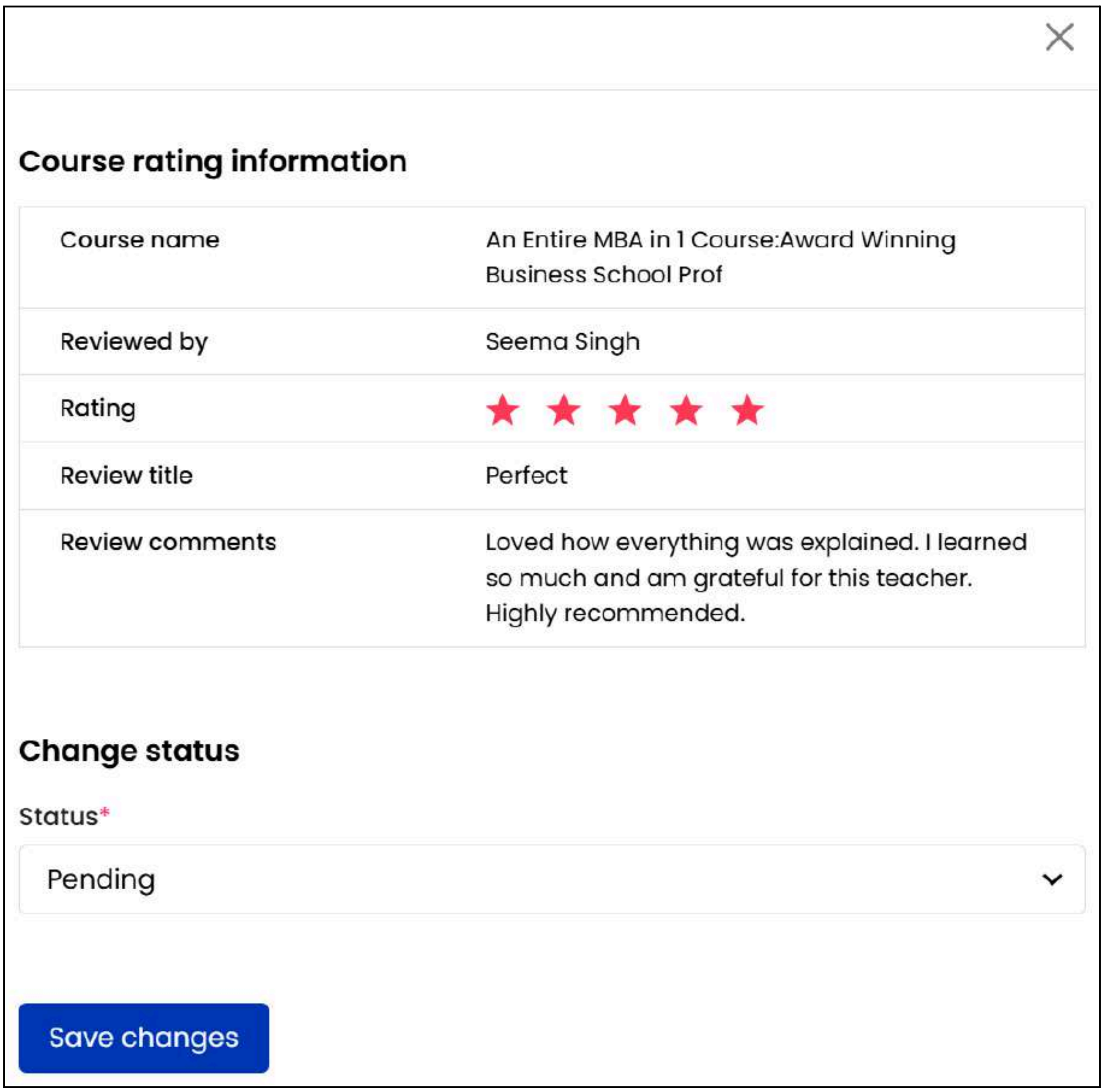
- **Status:** The review's current status, which can be pending, approved, or declined.
- **Posted on:** The date and time the review was submitted.

Action button

There is a single action button next to each entry—**Edit** . Use this button to view the details of the shared review and update its status.

Clicking this opens a drawer displaying the teacher's rating details and a section to modify the review's status.



Review the information under the Course rating information section, including:

- **Course name:** The name of the course for which the review and rating is given.
- **Reviewed by:** The user (learner) who shared the review.
- **Rating:** The star rating (1 to 5, with 5 being the highest) provided with the review.
- **Review title:** The title of the shared review.
- **Review comments:** Additional details or descriptions included in the review.

Once reviewed, change the status:

- **Status*:** Change the status by clicking the field and selecting from the available options: Pending, Approved, or Declined.

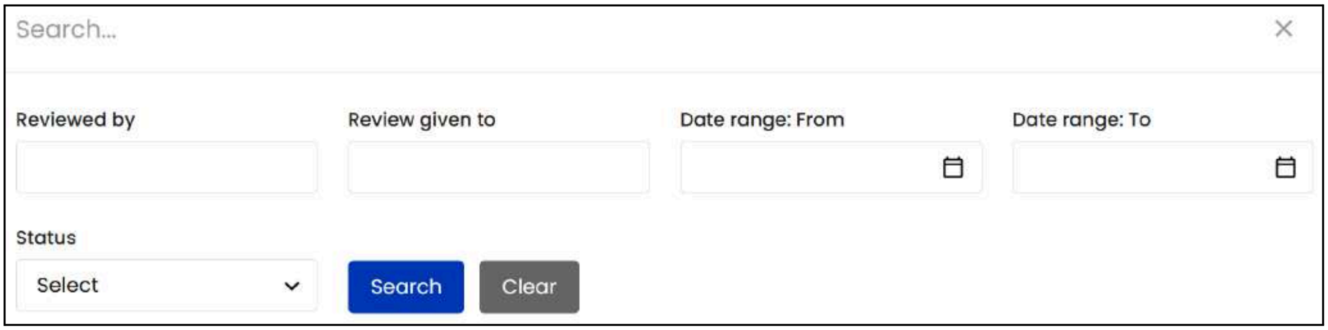
Click **Save changes** to update the status.

Search for a course review & rating

Use the search functionality at the top of the list to find a specific teacher review & rating.

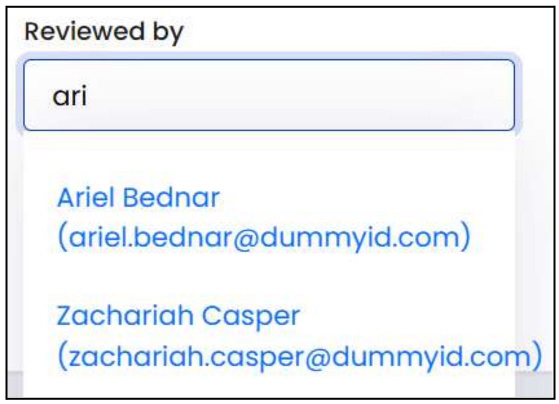
Click the search bar or to expand it. Click or the search bar again to collapse the section.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.



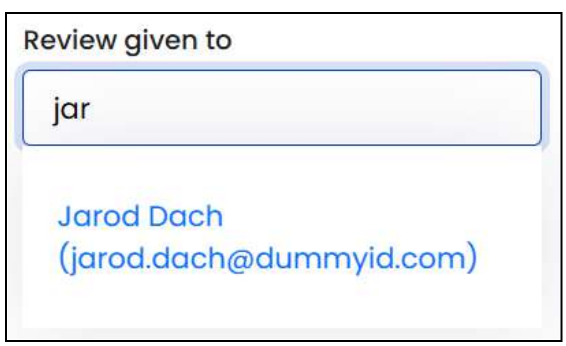
There are several filters that help narrow down the search. Each field is explained below:

- **Reviewed by:** Enter the name of the user (learner) who posted the review. Place the cursor in the field and start typing. As you type, a list of matching results will appear.



  Select the applicable option.

- **Review given to:** Enter the name of the user (teacher) who received the review in this field. Place the cursor in the field and start typing. As you type, a list of matching results will appear.

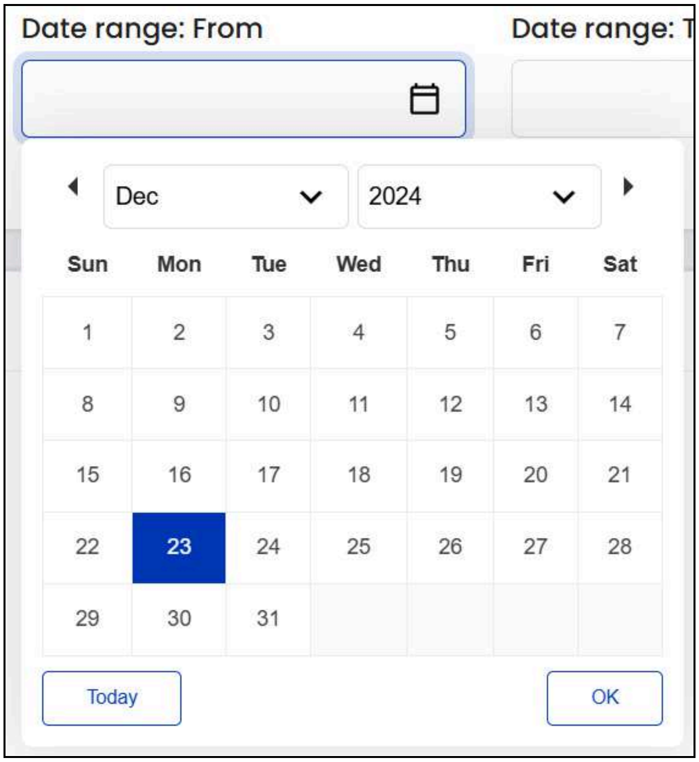


  Select the applicable option.

- **Date range: From:** To view the course reviews & ratings made on a specific date, select the desired date in this field.

  To filter course reviews & ratings made within a date range, select the start date by clicking the field.

  A calendar will appear; choose the date, and it will be added to the field.

  Use the **Today** button to select today's date and **Ok** to close the calendar.

- **Date range: To:** Select the ending date of the range in this field.

  *The **Date range: From** value must always be an earlier date, and the **Date range: To** value must be later than the date selected in the **Date range: From** field.*

  *For example, if the **Date range: From** is 09/24/2020, the **Date range: To** must be a date after this, such as 09/25/2020 or any future date. If incorrect dates are entered, no results will be displayed in the list.*

- **Status:** Select the status of the course review and rating from the dropdown list:
  - Pending
  - Approved
  - Declined

Search for a course review & rating by filling in a single field or multiple fields. To view the course reviews & ratings made within a specific date range, use the date fields.

After filling in the desired fields, click **Search** to display the results. Click **Clear** to reset all fields and start a new search.

Export course reviews & rating data

To export course reviews & ratings data from this page, click **Export** from the upper-right corner.

The data will be downloaded as a `.csv` file (Comma-Separated Values), which can be used for backups or external purposes.

A success message will appear once the download is complete.

To export specific course reviews & ratings data, use the search bar to apply the necessary filters and define the criteria.

After setting the filters and clicking **Search** to view the results, click **Export** to download the filtered data as a `.csv` file.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
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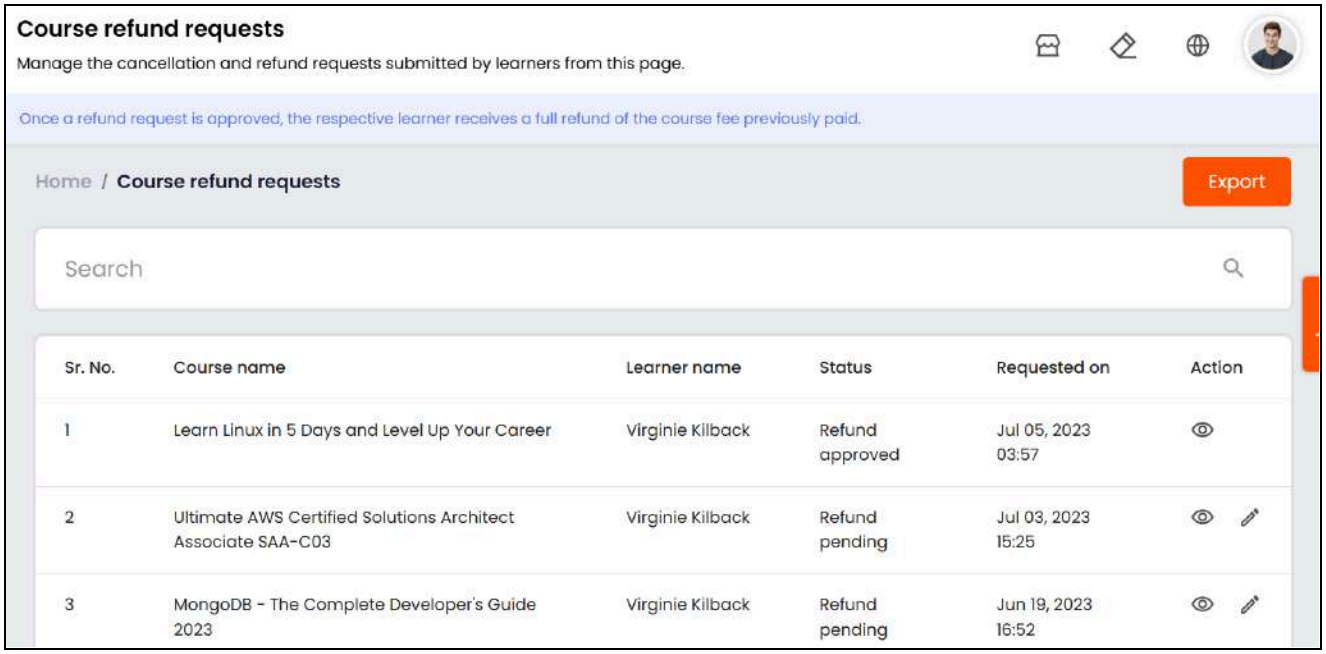
5.6 Course refund requests

This submodule allows you to manage all the course cancellation and refund requests submitted by learners.



The list will be empty if you just bought the platform and didn't choose to have dummy content provided by FATbit during the platform installation.

As the admin, you are required to review and update all the pending requests on this page. Refunds are processed only after you approve the requests through this submodule. Upon approval, the learner receives a full refund of the course fee.

Define the default course cancellation and refund request status under **Settings > System configurations >** [Courses]:

- If you set the default status to "**approved**," all refund requests will be automatically marked as "**refund approved**" in this list. Additionally, learners will get a full refund for their refund request instantly.
- If you set the default status to "**pending**," you will need to review each request under this submodule first, and either approve or decline it.

  Note that once a refund request is approved or declined, its status cannot be changed.

An approved request results in a full refund of the course price to the learner. A declined request cannot be reinstated.

You can also define the time frame within which learners can submit cancellation requests under **Settings > System configurations >** [Courses].

For example, if the cancellation period is set to 7 days, learners can cancel the course within 7 days of purchase. Requests cannot be submitted after this period.

Manage the course refund requests list

The list displays the following details for each course review & rating:

- **Sr. No.:** Serial number
- **Course name:** The name of course for which the refund request was placed.
- **Learner name:** The name of the learner who placed the refund request.
- **Status:** The refund request status, which can include, refund approved, refund pending, or refund declined.
- **Requested on:** The date and time the refund request was placed.

Action buttons

Under the **Action** column, each entry displays one or two buttons, depending on its status.

Requests that have not yet been reviewed and their status has not been updated (neither accepted nor declined) will have two action buttons.

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The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

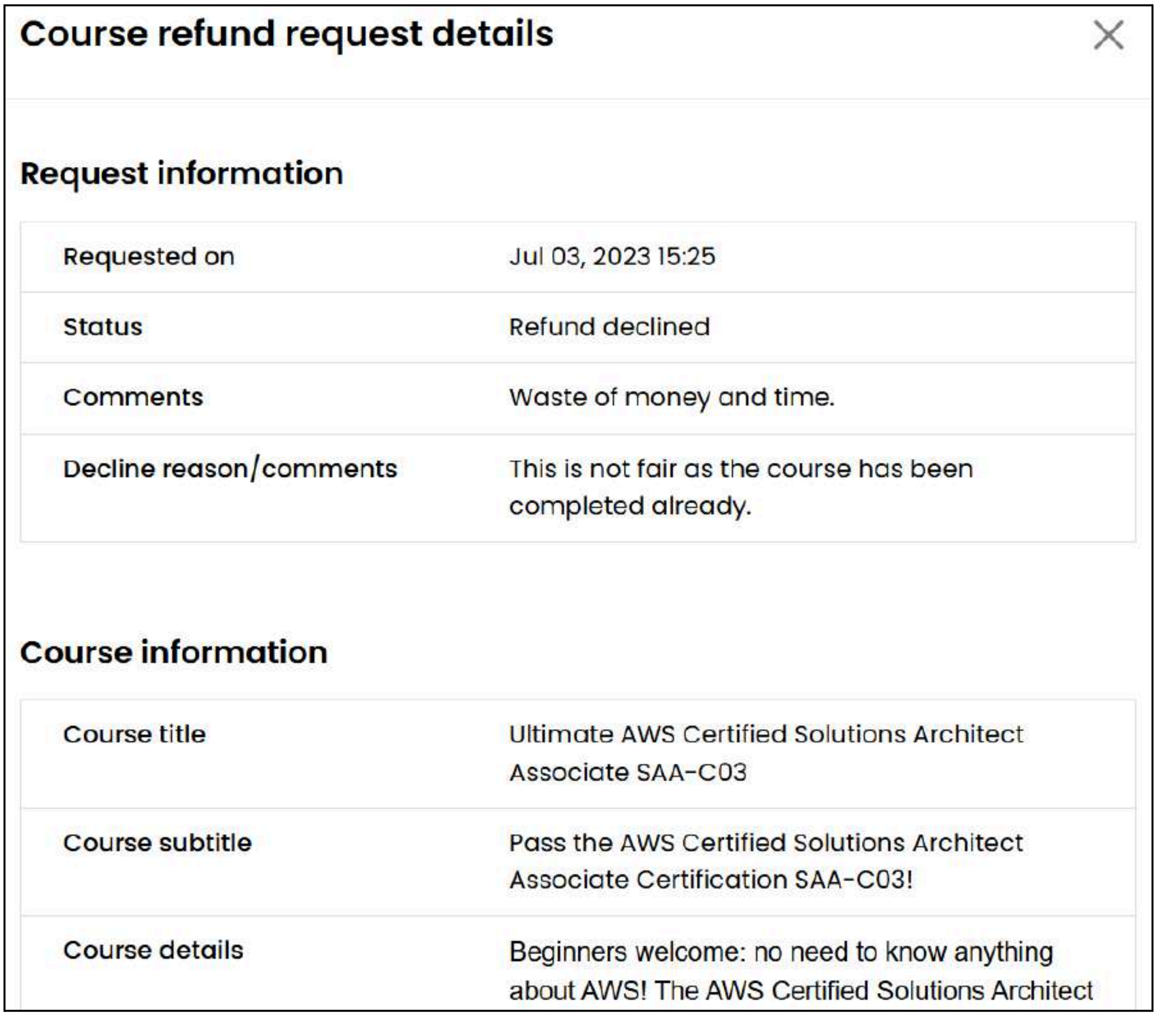
Requests with a finalized status—either approved or declined—will display only two buttons.

The function of each button is described in detail below.

i. View

Click the button beside a course refund request to review the refund details and make your decision accordingly.

A drawer will appear, displaying the details of the course refund request, including the request information, course information and profile information.



The request information includes:

- **Requested on:** The date and time when the course request was submitted.

- **Status:** The current approval status of the course (e.g., approved, pending, declined).
- **Comments:** The comments shared by the learner when placing the refund request.
- **Decline reason/comments:** The reason shared by the admin for declining the refund request.

  This is visible for those requests that have been declined.

The course information includes:

- **Course title:** The full title of the course.
- **Course subtitle:** A short description or additional information about the course.
- **Course details:** A description of the course objectives, topics, and benefits.

Course price	$596.00
Course duration	45h 43m
Status	Published

Profile information

First name	Virginie
Last name	Kilback
Gender	Female
Email	virginie.kilback@dummyid.com

- **Course price:** The cost of the course.
- **Course duration:** The total length of the course in hours and minutes.
- **Status:** The current state of the course, such as published or draft. Since only the published courses are listed under this list, the status will always appear as published here.

The profile information includes:

- **First name:** The learner's first name.

- **Last name:** The learner's last name.
- **Gender:** The learner's gender.
- **Email:** The learner's email address.

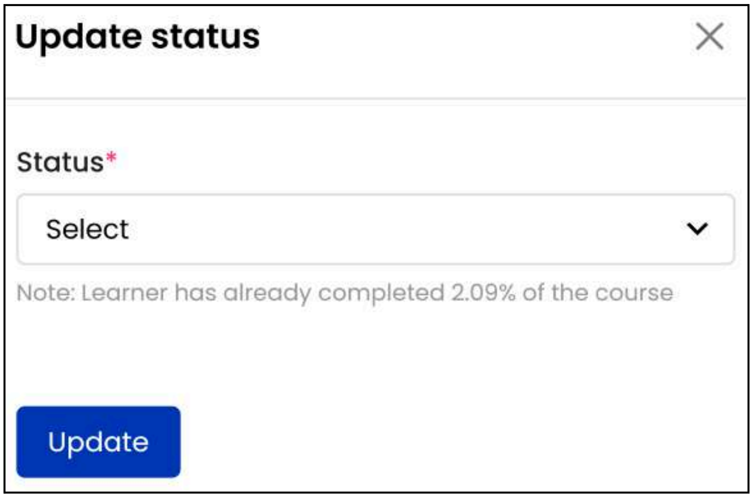
Review the details, then click ✕ in the upper-right corner of the drawer to close it.

ii. Change status

This button is visible only for course refund requests with a pending status. It does not appear for requests that have been approved or declined.

Once a request is approved or declined, the button disappears, preventing any further changes to your decision.

Click the button to open the **Update status** form.



Update the following:

- **Status*:** Use the dropdown list to select the status of the course request. The available options are:
  - Refund approved: Select this option to approve the refund request.
  - Refund declined: Select this option to decline the refund request.

If you select **Refund declined**, an additional field will appear:

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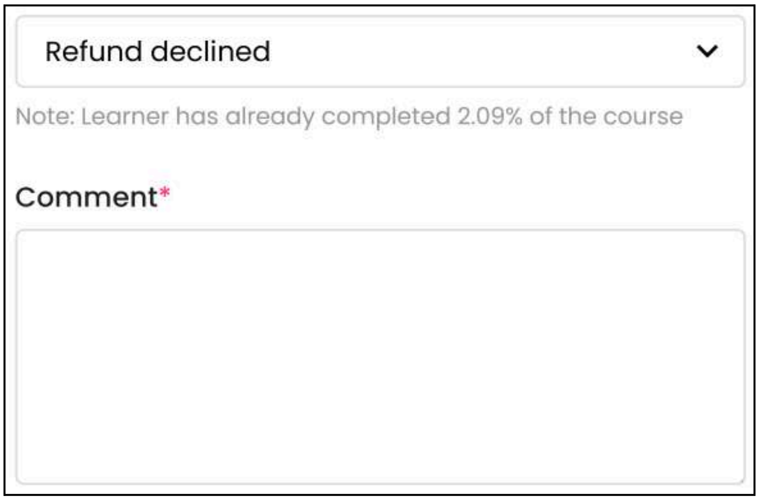


- **Comment*:** Provide the reason for declining the course request in this field.

After selecting the status, click **Update** to save the changes.

To update the status later, close the form by clicking in the upper-right corner.

Search for a course refund request

Use the search functionality at the top of the list to find a specific course refund request.

Click the search bar or to expand it. Click or the search bar again to collapse the section.

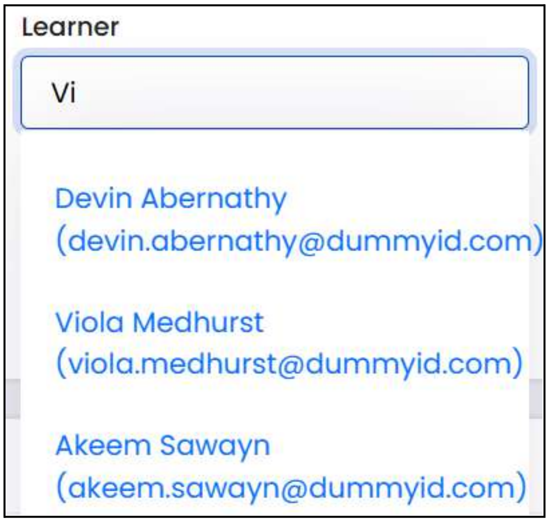
DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

Yo!Coach

There are several filters that help narrow down the search. Each field is explained below:

- **Keyword:** Enter the course refund request via its title or subtitle.
- **Learner:** Enter the name of the learner in this field.

  Place the cursor in the field and start typing. As you type, a list of matching results will appear.

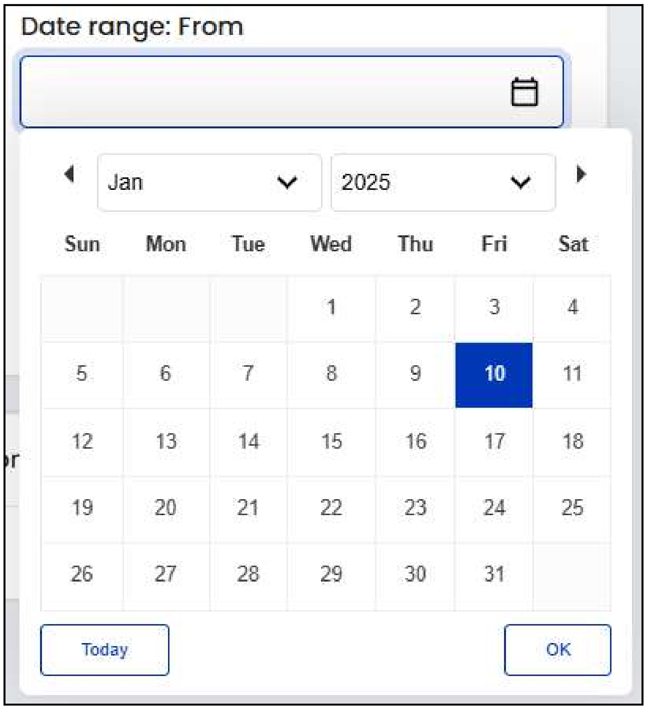
  Select the applicable option.

- **Status:** Select the status of the course refund request from the dropdown list:
  - Refund pending
  - Refund approved
  - Refund declined
- **Date range: From:** To view the course refund requests placed on a specific date, select the desired date in this field.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

To filter course refund requests placed within a date range, select the start date by clicking the field.

A calendar will appear; choose the date, and it will be added to the field.



Use the **Today** button to select today's date and **Ok** to close the calendar.

- **Date range: To:** Select the end time of the range in this field.

*The **Date range: From** value must always be an earlier date, and the **Date range: To** value must be later than the date selected in the **Date range: From** field.*

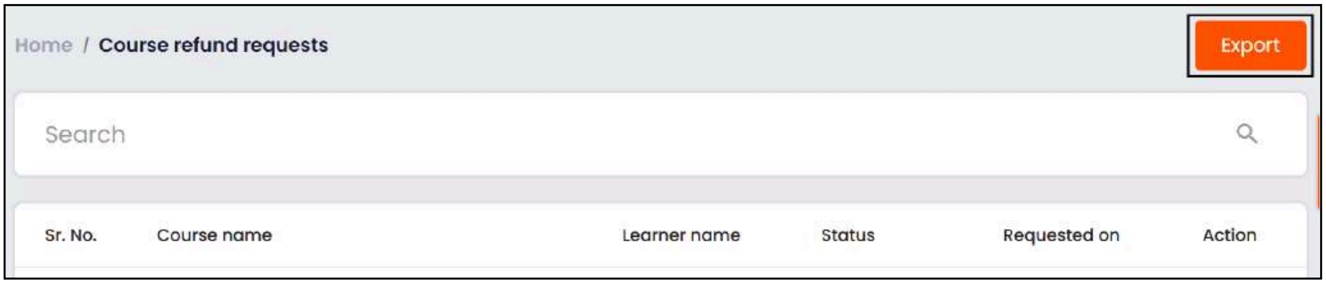
*For example, if the **Date range: From** is 09/24/2020, the **Date range: To** must be a date after this, such as 09/25/2020 or any future date. If incorrect dates are entered, no results will be displayed in the list.*

Search for a course refund request by filling in a single field or multiple fields. To view the course refund requests placed within a specific date range, use the date fields.

After filling in the desired fields, click **Search** to display the results. Click **Clear** to reset all fields and start a new search.

Export all course refund requests data

To export the all course refund requests data from this page, click **Export** from the upper-right corner.



The data will be downloaded as a `.csv` file (Comma-Separated Values), which can be used for backups or external purposes.

A success message will appear once the download is complete.

To export specific course refund requests data, use the [search bar] to apply the necessary filters and define the criteria.

After setting the filters and clicking **Search** to view the results, click **Export** to download the filtered data as a `.csv` file.

6. Quizzes

Quizzes are versatile tools designed to assess learners' understanding across various contexts, including standalone classes, packages, lessons, and courses. They offer an interactive way for learners to engage with content while enabling teachers to evaluate progress and outcomes effectively.

As the admin, your role is to set up and manage quiz categories on the platform. Teachers are responsible for creating quizzes, including defining their frameworks and attaching them to relevant lessons, classes or courses. While you can view quiz details and questions, you cannot make any changes or take actions on them.

Key points to note:

- Quizzes can only be linked to booked lessons and classes. They cannot be associated with unbooked lessons or classes. Learners receive a certificate if they attempt the quiz and achieve a satisfactory score.
- For courses, teachers can link quizzes as the final step of the course structure. These quizzes are accessible only to students who purchase the course. Once learners complete the quiz successfully, they are awarded a certificate as part of their course completion.

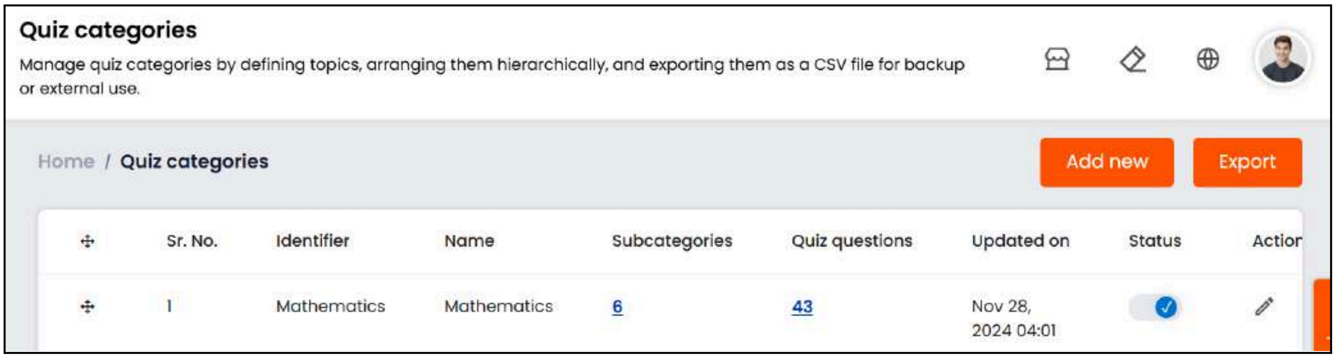
Use this module to review all quizzes created by teachers and manage quiz categories.

Expand this module to explore its submodules. Click on any submodule to visit its respective page. Each submodule is explained in detail.

6.1 Quiz categories

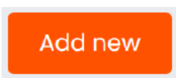
Manage all quiz categories to define and organize the topics teachers can select when creating quizzes.

Use categories to ensure consistency and structure in quiz content. Add subcategories under parent categories to create a clear hierarchy, helping maintain alignment with platform standards and providing a focused learning experience.

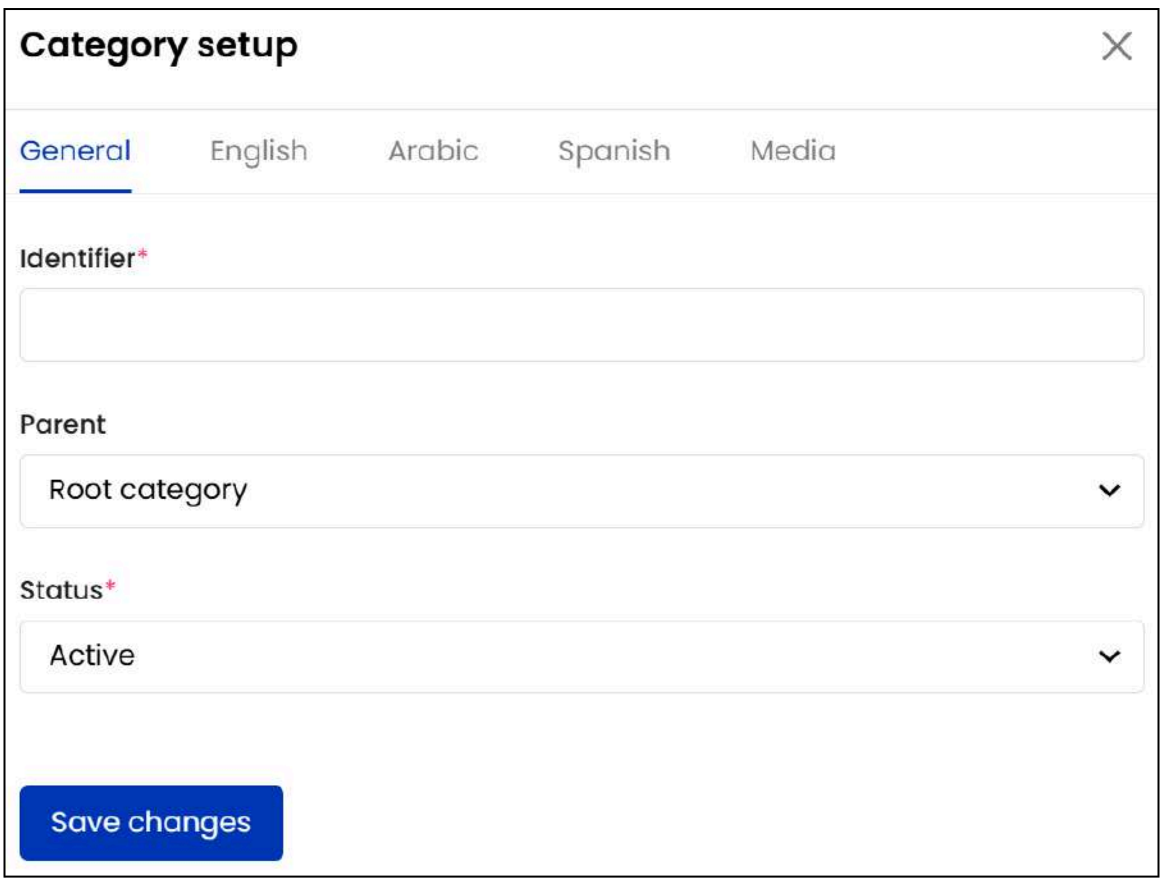


The list will be empty if you just bought the platform and didn't choose to have dummy content provided by FATbit during the platform installation.

Add a quiz category

Click 

in the upper-right corner of the page to open the **Category setup** form.



DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

This form contains multiple tabs: the General tab, followed by the Primary language tab. After that, you'll find the Secondary language tabs, corresponding to the languages available on your platform. The last tab is the Media tab.

Let's start with the **General tab**.

General tab

Update the following:

- **Identifier*:** Enter a unique quiz category identifier. It can match the quiz category name, as defined under the Language data tabs (e.g., English, Arabic, Spanish).

  The identifier is used to save data in the system and will not be displayed anywhere on the platform. Ensure the identifier is unique; otherwise, an error message will appear.

- **Parent:** Select whether the category is a parent (root) category or a subcategory.

  If it's a subcategory, choose the parent category from the available list by clicking the field and selecting the appropriate option from the dropdown.

  If it's a parent category, select "**Root category**" from the dropdown list.

- **Status:** Select the status of the quiz category.

  Click the field and select "**Active**" to publish it on the platform, enabling it to be linked to quizzes.

  Select "**Inactive**" to temporarily hide the quiz category; it will not appear in the quiz category dropdown lists across the platform, preventing teachers from linking quizzes to it.

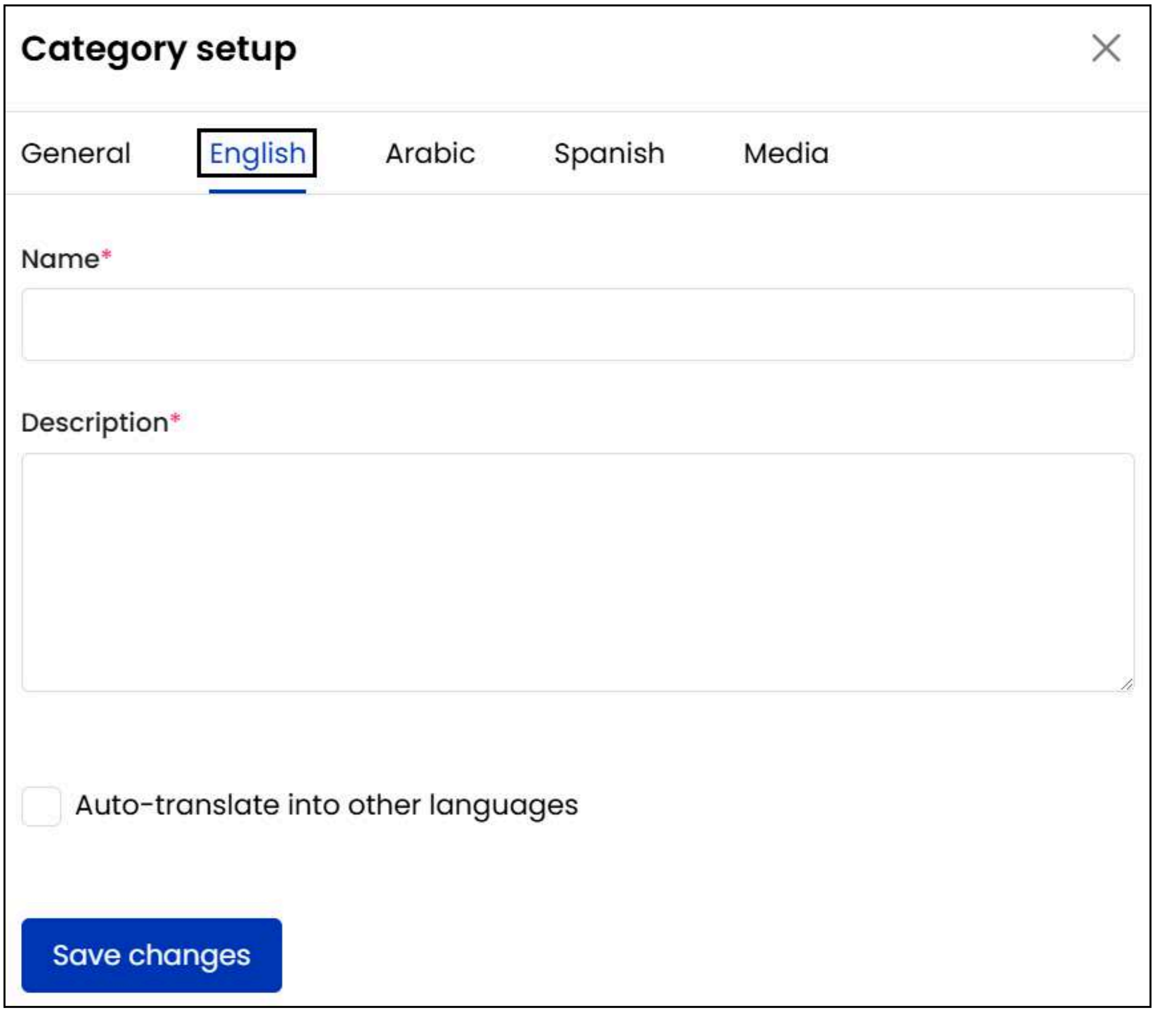
Once done, click **Save changes**.

This will direct you to the next tab, which is the primary language tab (English tab).

English tab

This is the primary language tab, and completing this tab is mandatory for publishing the quiz category on the platform.

Since English is set as the primary language, this tab is labeled **English.**



Update the following:

- **Name*:** Enter the quiz category name in the primary language.

  This name will be displayed to teachers under the quiz categories list and under the quiz.

- **Auto-translate into other languages:** Check mark this to automatically update the secondary language(s) data.

  The data in the subsequent language tab(s) will be auto-filled.

  This feature is available only if the [Microsoft text translator API](#) is configured under Settings > System configurations > [Third-party APIs](#).

  If you prefer to manually fill in the secondary language(s) data, leave the checkbox unselected.

Once done, click **Save changes**.

<u>**DISCLAIMER:**</u> The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

The next tab(s) will be the secondary language tab(s) (Arabic, Spanish, etc.), which include the same fields as the English tab. Edit the details as needed and save.

*If you had selected the auto-translate option, the secondary language tab(s) will be prefilled. Review the data, make any necessary edits, click **Save changes**, and move to the Media tab.*

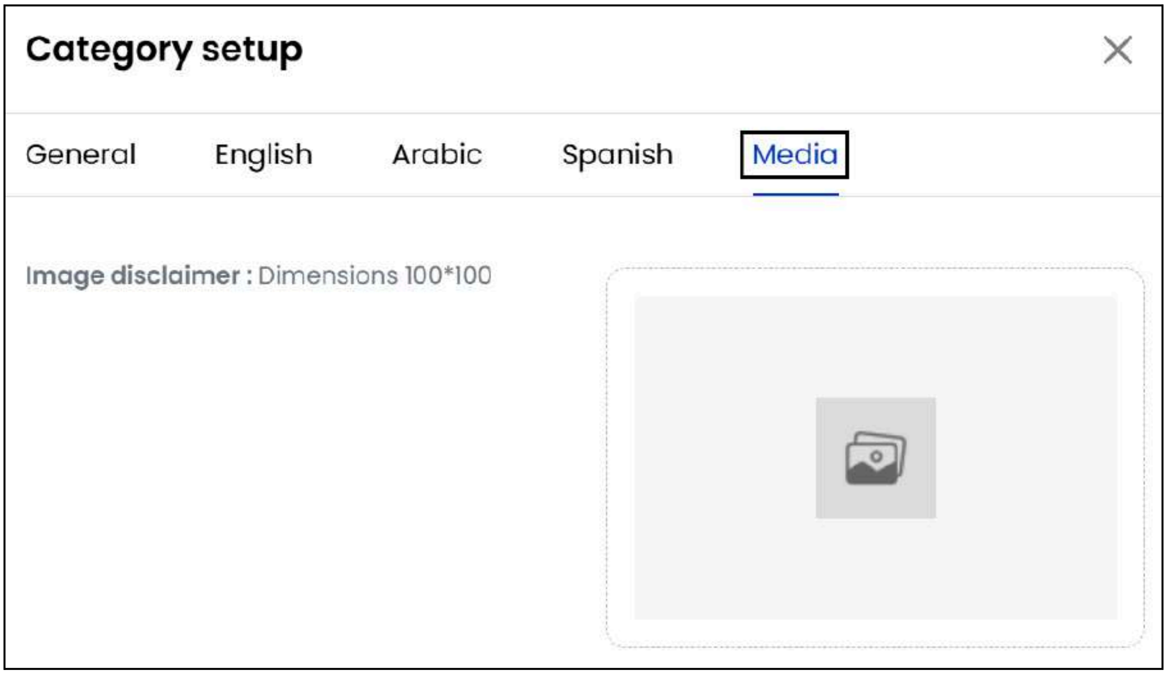
*If you did not use the auto-translate feature earlier, use the **Auto-translate & fill language data** button beside the **Save changes** button on each secondary language tab to auto-fill the secondary language fields. Then, click **Save changes**, and move to the next tab.*

*If you do not want to fill the secondary language tab(s) at this time, complete only the primary language tab (English tab), click **Save changes**, and move to the Media tab.*

Media tab

The final tab, following all the secondary language tabs, is the **Media** tab. Click this tab to access it, and update the quiz category's thumbnail image.

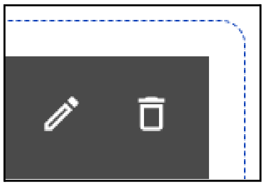
DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.



To upload it, hover over the image field.

Click . Select the image from your system, click **Open** and it will be uploaded.

After uploading the image, hovering over the image field reveals two buttons.



<u>**DISCLAIMER:**</u> The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

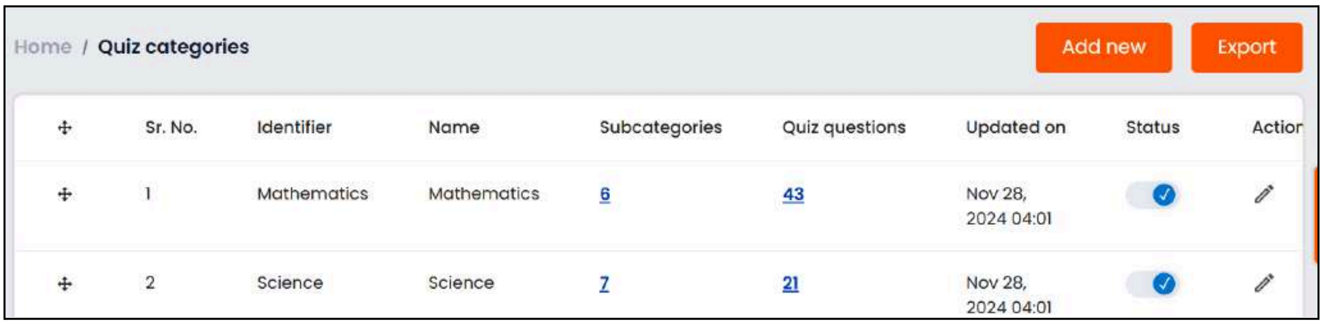
To edit the image again (change it), hover over the image field, click , select the image from your system and upload it.

To delete the image, hover over the image field and click .

*When you upload the image, it is saved automatically in the system, so no **Save changes** button is provided under this tab.*

After completing the process, click to close the form. The quiz category will then be added to the list.

Manage the quiz categories list



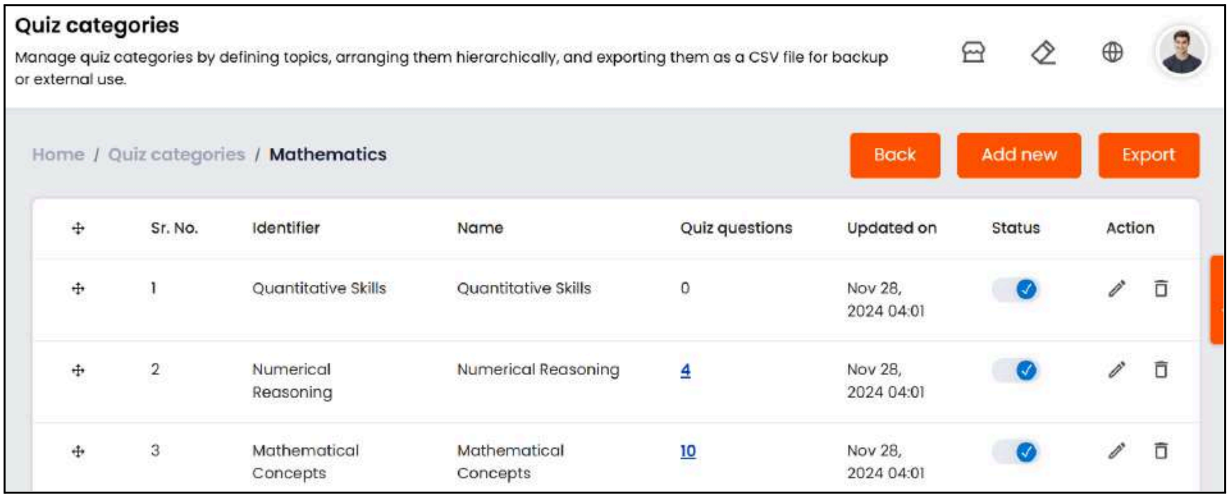
The list displays the following details for each quiz category:

- **Drag-and-drop :** Click this next to a quiz category to move it up or down the list, and the serial numbers will automatically update to reflect the new sequence.

  The quiz categories will appear in the same order across all lists on the platform, including the teacher's selection menu. This order will also determine how quiz questions are listed within each quiz.

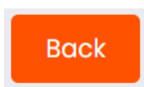
- **Sr. No:** The serial number.
- **Identifier:** This is the quiz category's system identifier, used to save data in the system and not displayed anywhere on the platform.
- **Name:** The quiz category name displayed throughout the platform and in the relevant lists.
- **Subcategories:** This number represents the total subcategories listed under the category.

It is a clickable link that directs you to the respective **quiz subcategories** page.

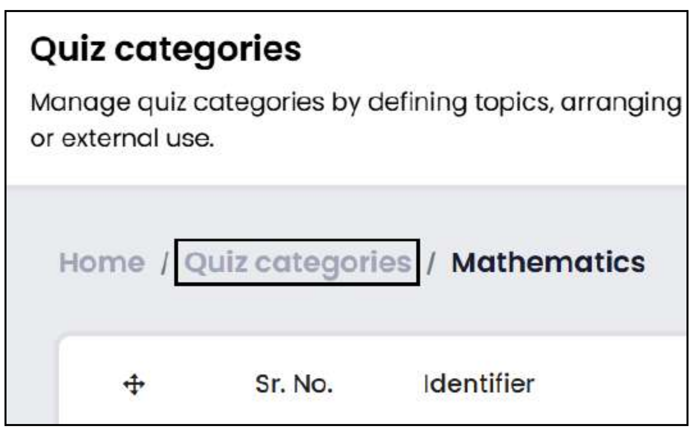


All features on this page mirror those on the [Quiz categories] page, except for the **subcategories** column, as a subcategory cannot have another subcategory on the Yo!Coach platform.

The remaining features are the same, including the [columns], **action buttons**, **export option**, and the ability to **add new items**.

Once you're finished, click 

to return to the [Quiz categories] page, or use the **Quiz categories** link in the breadcrumbs at the top of the page.



Alternatively, navigate back to the **Quiz categories** page by selecting the submodule from the navigation panel.

- **Quiz questions:** This number represents the total number of quiz questions linked to the category. It is a clickable link that directs you to the **Quiz questions** page, where all quiz questions linked to this category are listed.

All features on this page mirror those on the **Quiz questions** page. For more details on the available actions and information, please refer to the **Quiz questions** section in the manual.

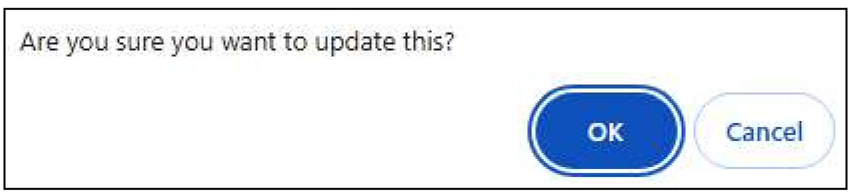
Note that to return to the [Quiz categories]() page from the **Quiz questions** page, you will need to select [Quiz categories]() from the navigation menu.

- **Updated on:** The date and time the quiz category details were last updated.
- **Status:** Edit the status (activate or deactivate) of a quiz category as per your requirements using the toggle switch beside it, under the status column.

Turn **on** the toggle switch beside the quiz category to activate it.

Leave this **off** or turn it **off** to deactivate the quiz category.

In both cases, a warning dialog box will appear for both actions, asking if you want to update the status or not.



Click **Ok** to delete it or **Cancel** to abort the action.

If the quiz category is linked to quiz questions, an error message will appear, preventing its deactivation.

When you deactivate a quiz category, it will no longer appear in the list for teachers to select, nor will it be displayed on the front end for learners to choose when selecting a course.

Action buttons

Under the **Action** column, each entry includes two action buttons, allowing you to perform specific actions. The functions of each button are explained in detail below:

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

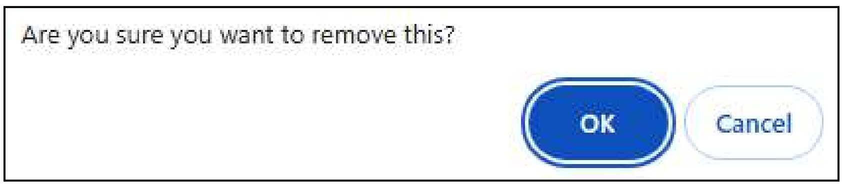
i. Edit

Click this to edit the quiz category's details. The Category setup form will appear.

Update the fields, then click **Save changes**. To close the form, click in the upper-right corner.

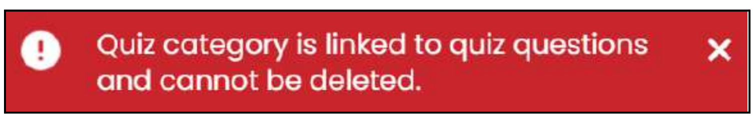
ii. Delete

Click this to delete the quiz category from the system. A confirmation message will appear.



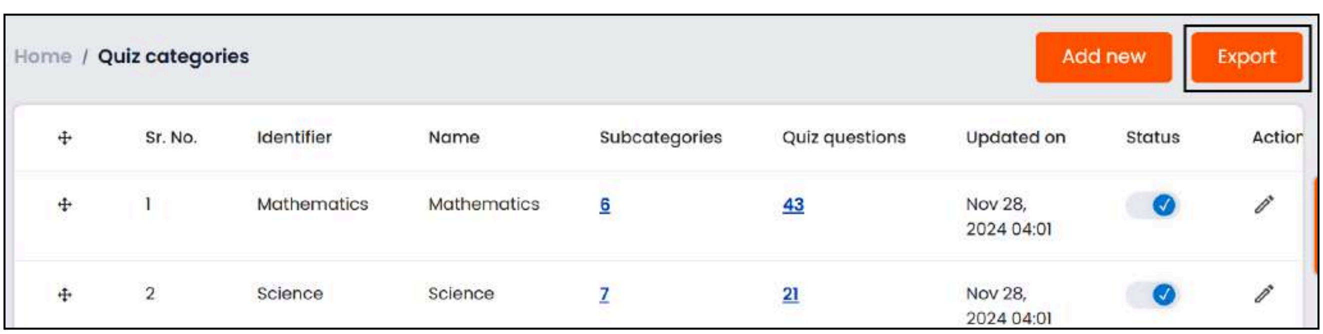
Click **OK** to confirm the action or **Cancel** to abort it.

If the quiz category is linked to quiz questions, an error message will appear, preventing the deletion.



Export quiz categories data

To export quiz categories data from this page, click **Export** from the upper-right corner.



The data will be downloaded as a `.csv` file (Comma-Separated Values), which can be used for backups or external purposes.

A success message will appear once the download is complete.

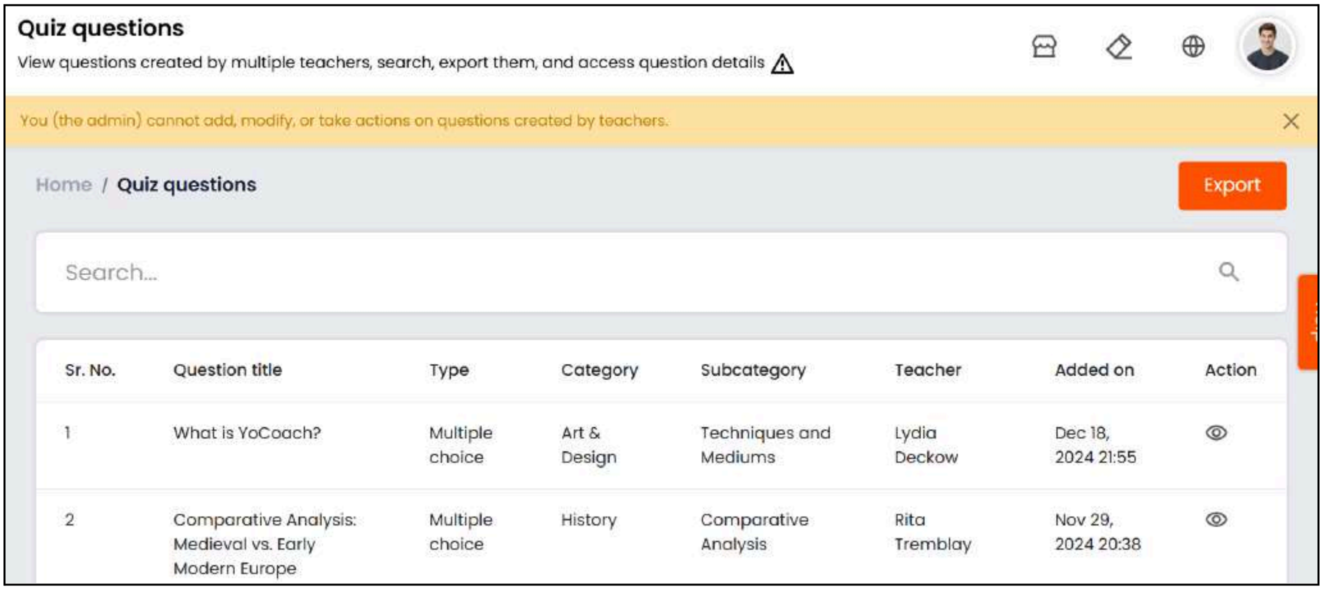
DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

6.2 Quiz questions

Manage quiz questions created by multiple teachers in this submodule.

The repository contains a variety of question types, including multiple-choice, single-choice, and text-based questions, designed to support versatile quiz creation.

Note that admins are limited to managing existing questions and cannot add new ones to the platform. Only teachers can create quiz questions.



The list will be empty if you just bought the platform and didn't choose to have dummy content provided by FATbit during the platform installation.

Manage the quiz questions list

The list displays the following details for each quiz questions:

- **Sr. No:** The serial number.
- **Question title:** The title of the quiz question.
- **Type:** The type of quiz question, which can be multiple-choice, single-choice, or text-based.
- **Category:** The category to which this quiz belongs.

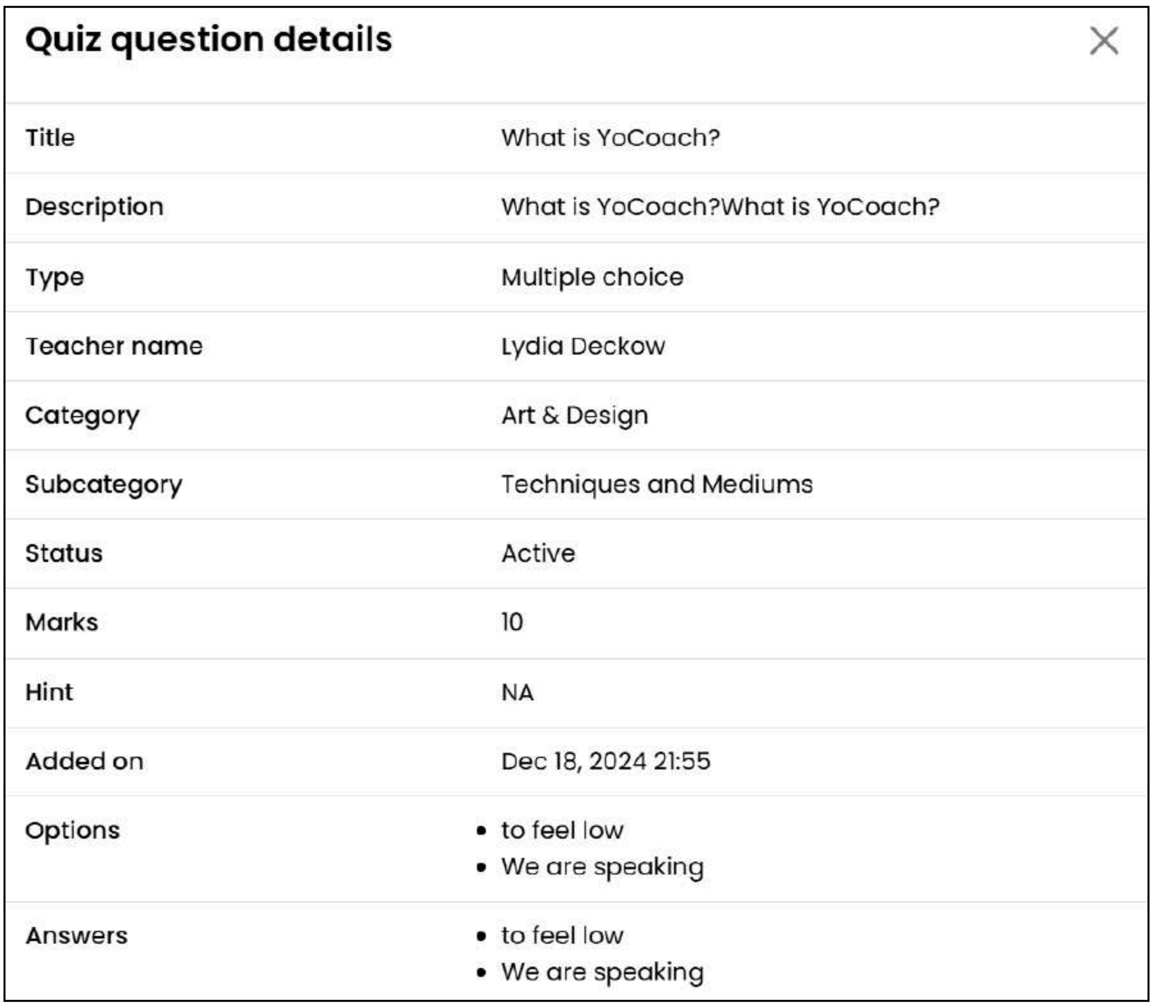
- **Subcategory:** The subcategory to which this quiz belongs.
- **Teacher:** The name of the teacher who created the quiz question.
- **Added on:** The date and time the quiz question was added on.

Action button

There is a single action button next to each entry—**View** .

Click this button to view the quiz question details.

A drawer will appear, displaying the details of the course refund request, including the request information, course information and profile information.



The information displayed here includes:

- **Title:** The name or title of the quiz question.
- **Description:** A brief explanation or context for the quiz question.
- **Type:** This defines the type of quiz question, which can include, multiple-choice, single-choice, or text-based.
- **Teacher name:** The name of the teacher who created the quiz question.
- **Category:** The category under which the quiz question is classified.
- **Subcategory:** The subcategory under which the quiz question is classified.
- **Status:** The current state of the question, such as active or inactive.
- **Marks:** The points or marks assigned to the question.
- **Hint:** Additional clues or assistance related to the quiz question, if available. If no hints have been added by the teacher, the value will be NA.
- **Added on:** The date and time when the question was created or added to the system.
- **Options:** The possible answer choices for the quiz question.
- **Answers:** The correct answers from the given options.

Review the details, then click in the upper-right corner of the drawer to close it.

Search for a quiz question

Use the search functionality at the top of the list to find a specific quiz question.

<u>**DISCLAIMER:**</u> The color theme and labels may differ in the screenshots compared to those on the platform.
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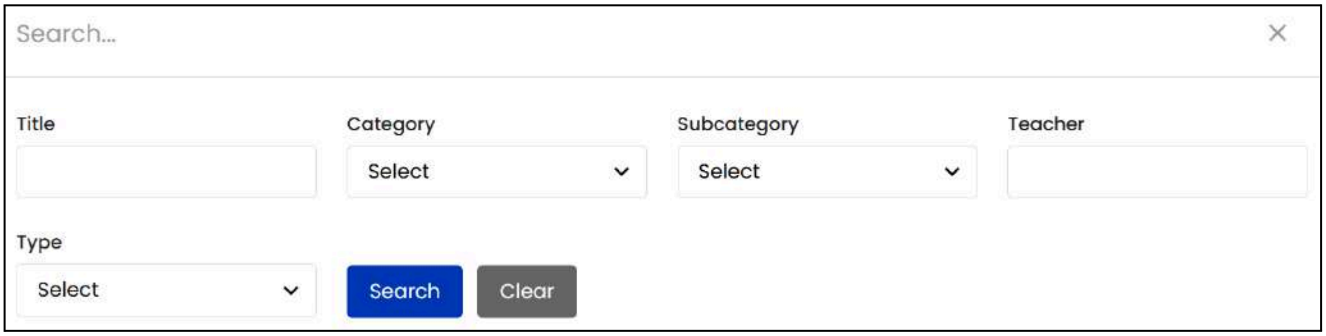
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

Click the search bar or to expand it. Click or the search bar again to collapse the section.



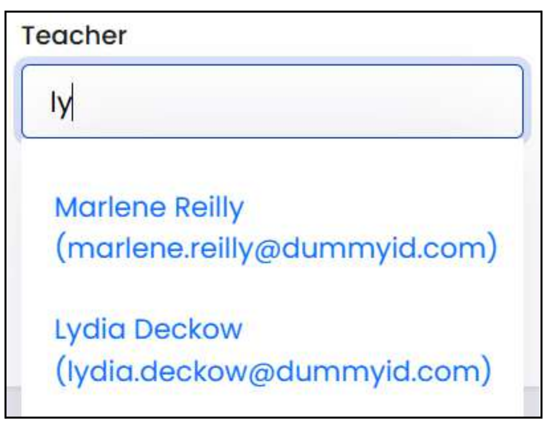
There are several filters that help narrow down the search. Each field is explained below:

- **Title:** Enter the quiz question's title in this field.
- **Category:** Click the field and select the quiz question's category from the dropdown list.

  The list only includes quiz categories created under **Quizzes** > Quiz categories.
- **Subcategory:** Click the field and select the quiz question's subcategory from the dropdown list.

  The list only includes quiz subcategories created under **Quizzes** > Quiz categories.
- **Teacher:** Enter the teacher who created the quiz question.

  Place the cursor in the field and start typing. As you type, a list of matching results will appear.



  Select the applicable option.

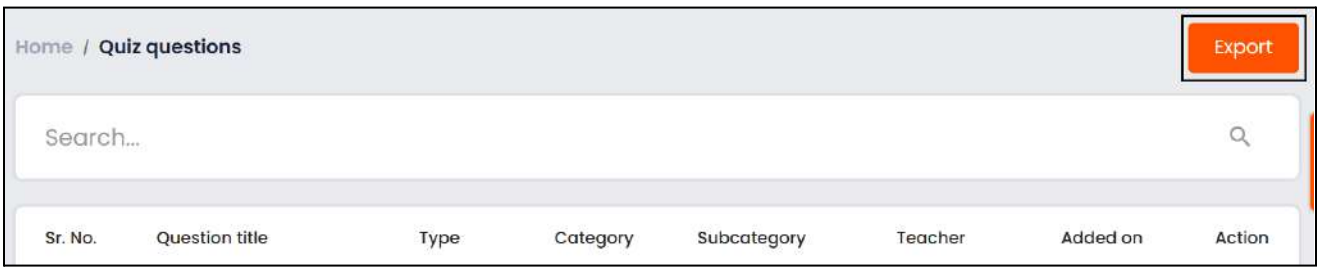
- **Type:** Click the field and select the type of quiz question from the available options, which include:
  - Single choice
  - Multiple choice
  - Text

Search for a quiz question by filling in a single field or multiple fields.

After filling in the desired fields, click **Search** to display the results. Click **Clear** to reset all fields and start a new search.

Export quiz questions data

To export the quiz questions data from this page, click **Export** from the upper-right corner.



The data will be downloaded as a `.csv` file (Comma-Separated Values), which can be used for backups or external purposes.

A success message will appear once the download is complete.

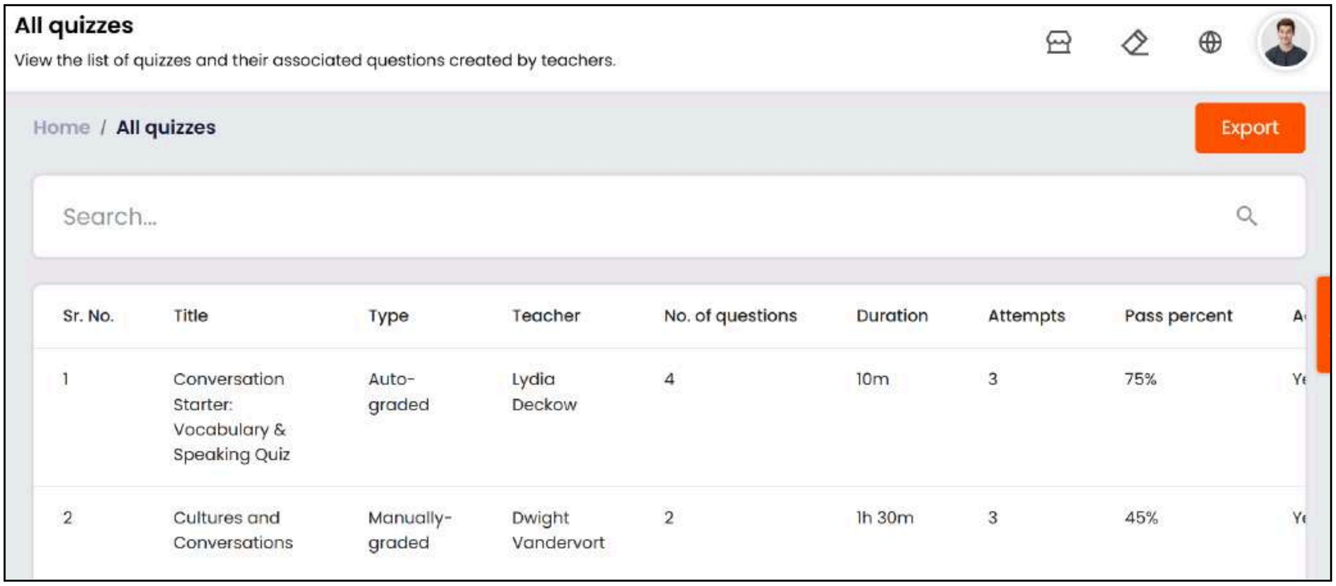
To export specific quiz questions data, use the [search bar]() to apply the necessary filters and define the criteria.

After setting the filters and clicking **Search** to view the results, click **Export** to download the filtered data as a `.csv` file.

6.3 All quizzes

View and track all the quizzes and their associated questions created by the teachers on the platform for classes, lessons, and courses.

Only teachers can create the quizzes on the platform. However, you (the admin) can view the list of all the quizzes and their associated questions using the action buttons beside them.



The list will be empty if you just bought the platform and didn't choose to have dummy content provided by FATbit during the platform installation.

Manage the all quizzes list

The list displays the following details for each quiz:

- **Sr. No:** The serial number.
- **Title:** The title of the quiz.
- **Type:** The quiz type, which can be:
    - **Auto-graded:** The system automatically assigns grades based on scoring criteria set by the teacher.
    - **Manually-graded:** The teacher reviews and assigns grades manually.

- **Teacher:** The name of the teacher who created the quiz.
- **No. of questions:** The number of questions linked to the quiz.
- **Duration:** The duration of the quiz.
- **Attempts:** The number of attempts learners are allowed for the quiz.
- **Pass percent:** The percentage required to pass the quiz, after which it will be marked as complete.
- **Active:** The status of the quiz set by the teacher, which can be either active or inactive.

  "**Yes**" indicates the teacher has marked the quiz as active, while "**No**" indicates it is inactive.

  This feature allows teachers to hide a published quiz from the platform without deleting it.

  To ensure a quiz is visible on the platform, it must be both active and published (as defined in the next column).

- **Status:** This defines the published status of the quiz, which can be either published or draft.

  A quiz with a published status is visible to learners, provided it is also marked as active.

  A quiz in draft status has not yet been published and will not be visible to learners.

- **Added on:** The date and time when the quiz was added by the teacher.

Action buttons

Under the **Action** column, all quizzes have two buttons that enable you to perform various actions.

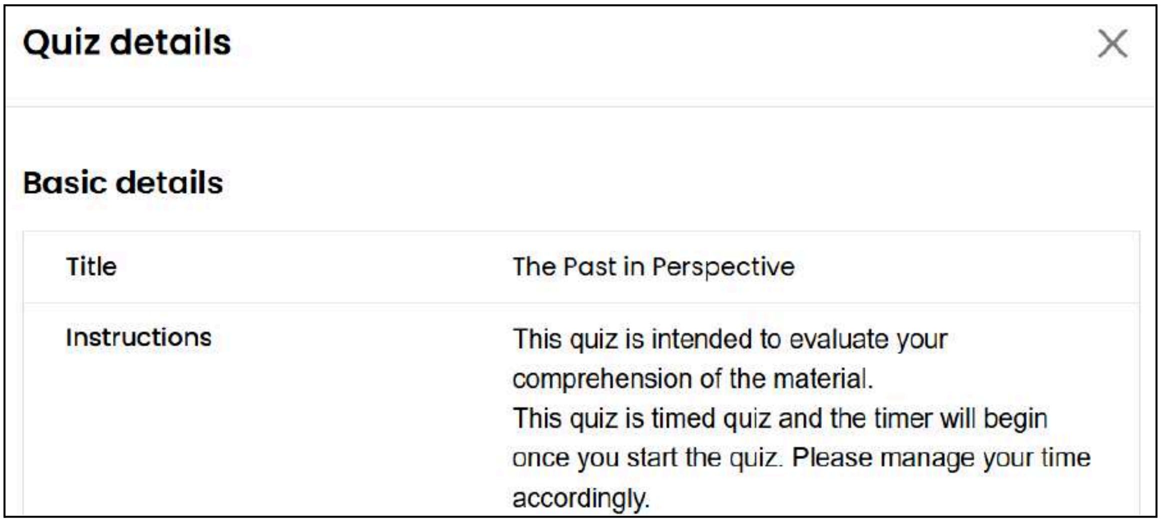
Each button's function is explained in detail below:

i. View

Click the button beside a quiz to review the quiz details.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

A drawer will appear, displaying the details of the quiz, including the basic details and additional information.



The basic details include:

- **Title:** The title of the quiz.
- **Instructions:** The instructions of the quiz.

- **Type:** The quiz type, which can be:
  - **Auto-graded:** The system automatically assigns grades based on scoring criteria set by the teacher.
  - **Manually-graded:** The teacher reviews and assigns grades manually.
- **Teacher name:** The teacher who created the quiz.
- **Active:** The status of the quiz set by the teacher, which can be either active or inactive.

"**Yes**" indicates the teacher has marked the quiz as active, while "**No**" indicates it is inactive.

> *This feature allows teachers to hide a published quiz from the platform without deleting it.*
>
> *To ensure a quiz is visible on the platform, it must be both active and published (as defined in the next column).*

- **Status:** This defines the published status of the quiz, which can be either published or draft.

> *A quiz with a published status is visible to learners, provided it is also marked as active.*
>
> *A quiz in draft status has not yet been published and will not be visible to learners.*

- **Added on:** The date and time when the quiz was created or added to the system.

The additional information includes:

Settings

Duration	1h 30m
No. of attempts allowed	3
Pass percentage	45%
Validity	15 Hour(s)
Certificate	No
No. of questions	2
Pass message	Congratulations! You have successfully passed the exam. Keep up the great work!
Fail message	Unfortunately, you did not pass the exam. Please review your answers and study the material further.

- **Duration:** The duration of the quiz.
- **No. of attempts allowed:** The number of attempts learners are allowed for the quiz.

- **Pass percentage:** The percentage required to pass the quiz, after which it will be marked as complete.

- **Validity:** This defines how long the quiz remains valid after the teacher assigns or links it to a specific class or lesson.

  For example, if a teacher links a quiz to a lesson or class at 12:00 PM and sets the validity to 10 hours, learners will have 10 hours from 12:00 PM to complete the quiz before it expires.

  This is applicable only to classes and lessons, as their timing is predefined. It does not apply to courses, as the timing of learner access or purchase cannot be determined.

- **Certificate:** This specifies whether the quiz provides a certificate upon completion or not.

  "**Yes**" means a certificate will be provided after the quiz is completed, while "**No**" means no certificate will be issued.

- **No. of questions:** The number of questions linked to the quiz.

- **Pass message:** The message displayed to the learner upon completing and passing the quiz.

- **Fail message:** The message displayed to the learner upon completing and failing the quiz.

Review the details, then click ✕ in the upper-right corner of the drawer to close it.

ii. Quiz questions

Click the button to view all the quiz questions linked to the respective quiz. This action redirects you to the Quiz questions page, which lists only the quiz questions associated with the quiz.

The details displayed are identical to those on the Quiz questions page, but the list is limited to the quiz questions that are in the quiz. Perform the same actions as available in the Quiz questions submodule (for more information on these actions, refer to the Quiz questions submodule documentation).

To return to the **All quizzes** page, select the **All quizzes** submodule from the navigation panel.

Search for a quiz

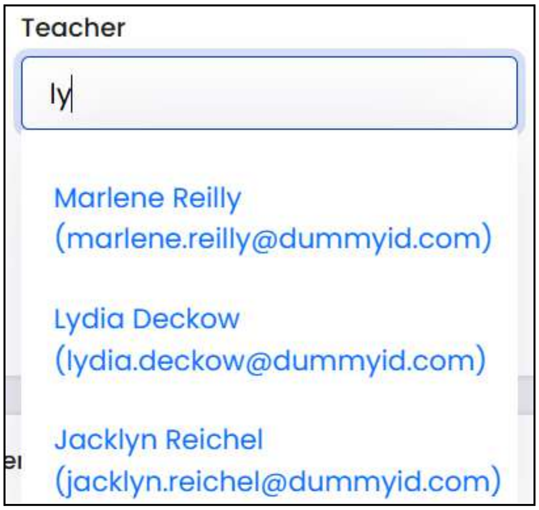
Use the search functionality at the top of the list to find a specific quiz.

Click the search bar or 🔍 to expand it. Click ✕ or the search bar again to collapse the section.

There are several filters that help narrow down the search. Each field is explained below:

- **Title:** Enter the quiz title in this field.
- **Teacher:** Enter the teacher who created the quiz question.

  Place the cursor in the field and start typing. As you type, a list of matching results will appear.



Select the applicable option.

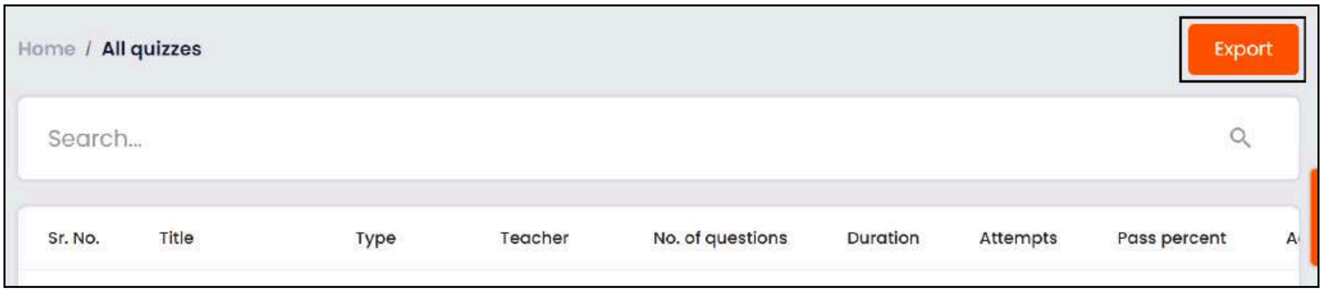
- **Type:** Click the field and select the quiz grading type from the available options:
    - Auto-graded
    - Manually-graded
- **Status:** Click the field and select the quiz's publish status from the available options:
    - Published
    - Drafted
- **Active:** Click the field and select the activation status of the quiz from the available options:
    - **Yes:** Select if the quiz is active.
    - **No:** Select if the quiz is inactive.

Search for a quiz by filling in a single field or multiple fields.

After filling in the desired fields, click **Search** to display the results. Click **Clear** to reset all fields and start a new search.

Export quizzes data

To export the quizzes data from this page, click **Export** from the upper-right corner.



The data will be downloaded as a `.csv` file (Comma-Separated Values), which can be used for backups or external purposes.

A success message will appear once the download is complete.

To export specific quizzes data, use the search bar to apply the necessary filters and define the criteria.

After setting the filters and clicking **Search** to view the results, click **Export** to download the filtered data as a `.csv` file.

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7. Orders

The Orders module provides a centralized interface for viewing, searching, and managing various types of orders placed on the platform. These orders may originate from either Learners or Teachers registered on the platform.

To streamline navigation, the module is divided into several sub-modules, each focusing on a specific order type. This structure allows you to efficiently manage and track platform transactions.

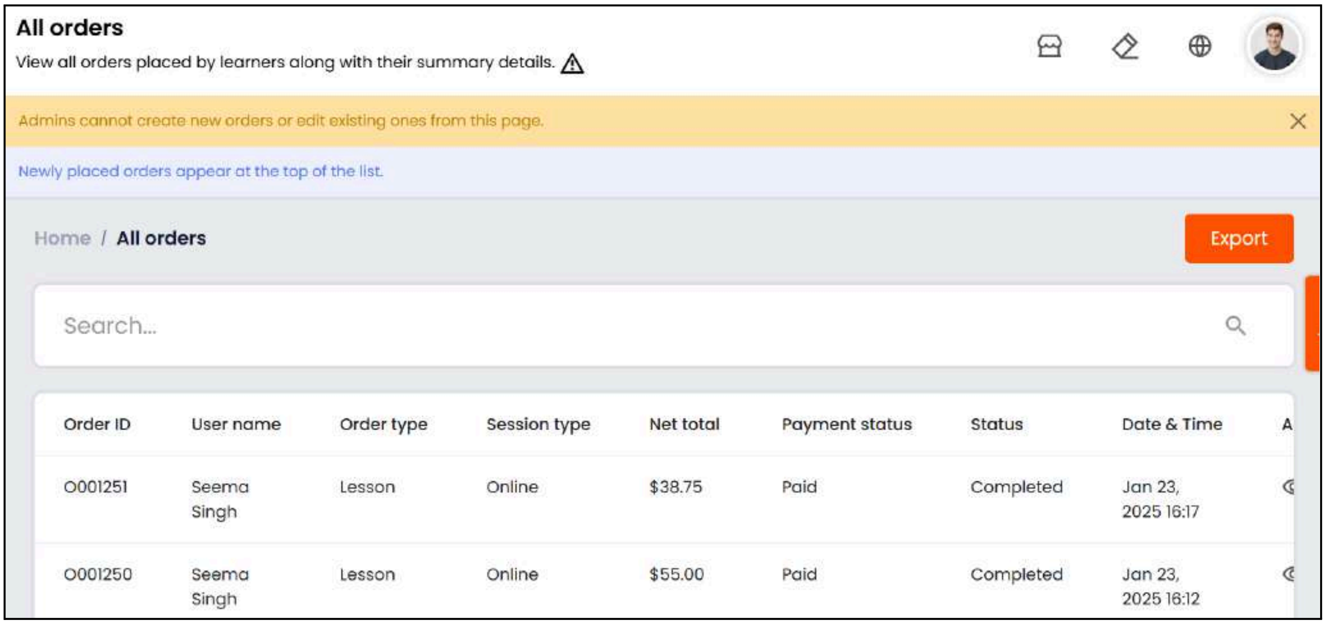
Expand this module to explore its submodules. Click on any submodule to visit its respective page.

Each submodule is explained in detail.

7.1 All orders

The **All orders** submodule provides a centralized location for accessing all types of orders placed on the platform, offering you a comprehensive overview of learner transactions.

While individual orders are organized within their respective submodules, this page consolidates them for streamlined tracking and monitoring.



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Newly placed orders are always displayed at the top, making it easy to locate recent transactions. You can view the summary details of each order, including its type, status, payment, and date.

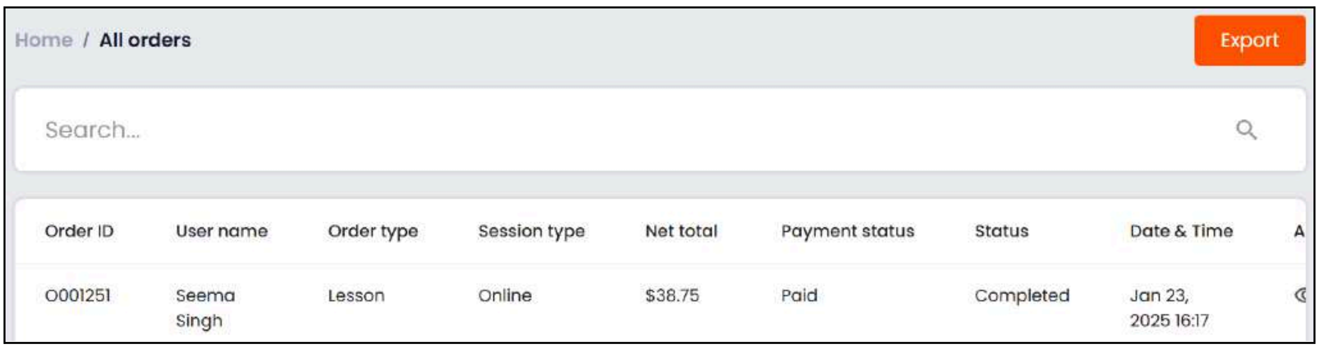
The list will be empty if you recently purchased the platform and chose not to include dummy content provided by FATbit during installation, or if no orders have been placed yet.

Although you cannot create new orders or edit existing ones from this page, you can manually update the payment status of **unpaid** orders, including those placed using the **bank transfer** payment method.

*Kindly note that the payment status for **unpaid** orders can only be updated through this submodule, regardless of the order type. It cannot be updated on the respective order pages.*

For orders where the payment has been canceled or completed, no actions can be performed, making this page a read-only resource for efficient transaction oversight.

Manage the all orders list



The list displays the following details for each order:

- **Order ID:** A unique identifier assigned to every order.
- **User name:** The name of the user who placed the order.
- **Order type:** The type of order, which can be lessons, recurring lessons, subscription plan, group classes, course, packages, gift card, or wallet recharge.
- **Session type:** The session type associated with the order, which can be either online or offline. For orders where the session type does not apply, such as course or gift card orders, NA will be displayed.

- **Net total:** The total amount paid for the order, calculated by subtracting any discounts applied from the total order amount.
- **Payment status:** This defines the payment status of the order, which can be either paid or unpaid.
- **Status:** The current order status, which can be either in process, completed or canceled.
- **Date & Time:** The date and time when the order was placed.

Action buttons

Under the **Action** column, each entry displays two or three buttons, depending on its status.

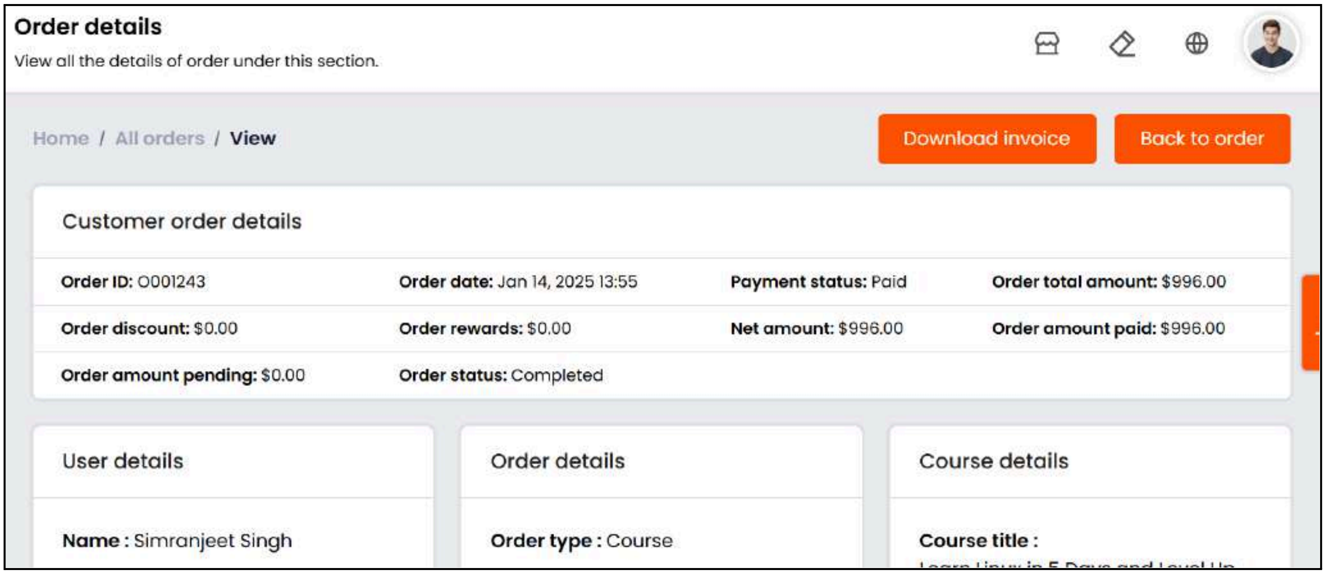
Orders whose statuses are "in process" (typically those with bank transfer payments, where payment is not yet completed) will have three buttons.

The orders that have—either been completed or canceled—will have only two buttons.

The function of each button is described in detail below.

i. View

Click the button to view all the details of the order. This action redirects you to the **Order details** page.



Each order detail page contains five sections, or six sections for orders with pending payment (when bank transfer is the payment method) or an in-process order status.

Each section has been explained in detail below:

a. Customer order details

Customer order details

Order ID: O001243	**Order date:** Jan 14, 2025 13:55	**Payment status:** Paid	**Order total amount:** $996.00
Order discount: $0.00	**Order rewards:** $0.00	**Net amount:** $996.00	**Order amount paid:** $996.00
Order amount pending: $0.00	**Order status:** Completed		

This section displays the customer order details, including the order ID, order date, payment status, total amount, discounts, rewards, net amount, amount paid, amount pending, and order status.

b. User details

User details

Name : Simranjeet Singh

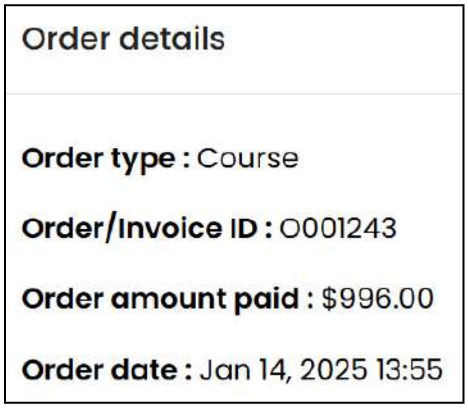
Email : simranjeet@dummyid.com

User ID : 114

User timezone : UTC +05:30 Asia/Kolkata

This section displays the details of the user who placed the order, including their name, email, user ID, and timezone.

c. Order details

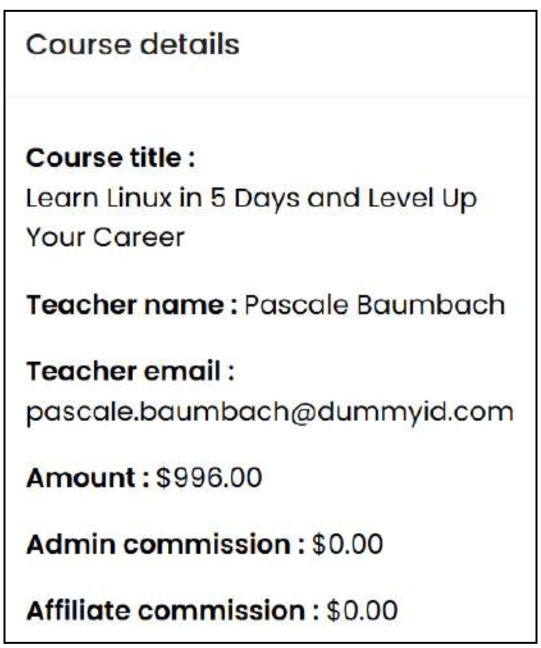


This section displays order details, including the order type, order/invoice ID, amount paid, and order date.

d. {order_type} details

The name of this section depends on the order type. For example, if the order is a course order, the section will be labeled as Course details; if it is a group class order, it will be labeled as Class details. Each case is explained below:

Course details

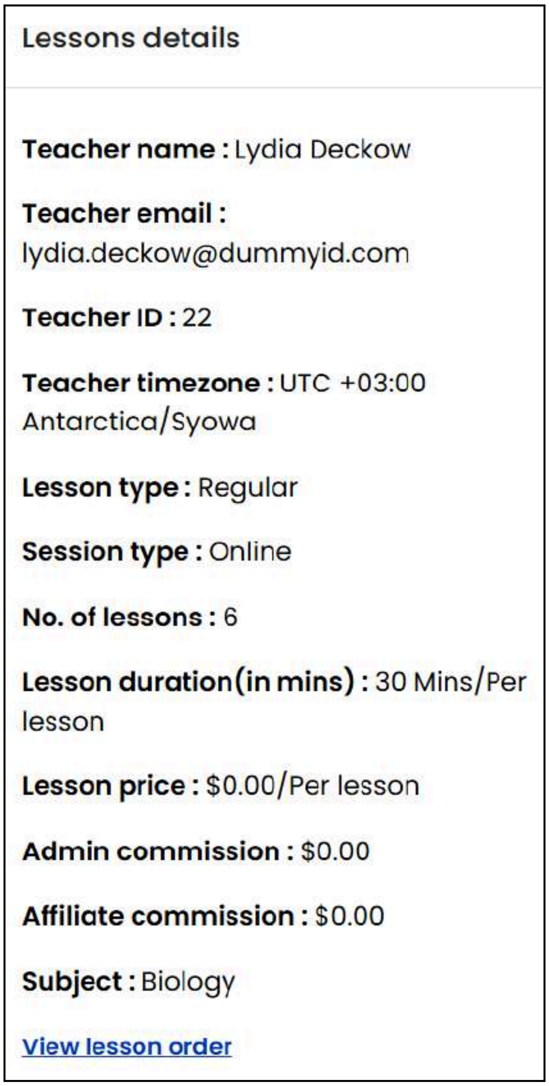


For course order types, the section is labeled as Course details.

It displays information such as the course title, teacher name (the teacher offering the course), teacher email, amount, admin commission, and affiliate commission.

Refer to [Course orders](#) for more information on details related to course orders.

Lesson details



For lesson order types, the section is labeled as Lesson details. It includes information such as the teacher name (the teacher conducting the lesson), teacher email, teacher ID, teacher timezone, lesson type (regular, free trial, or

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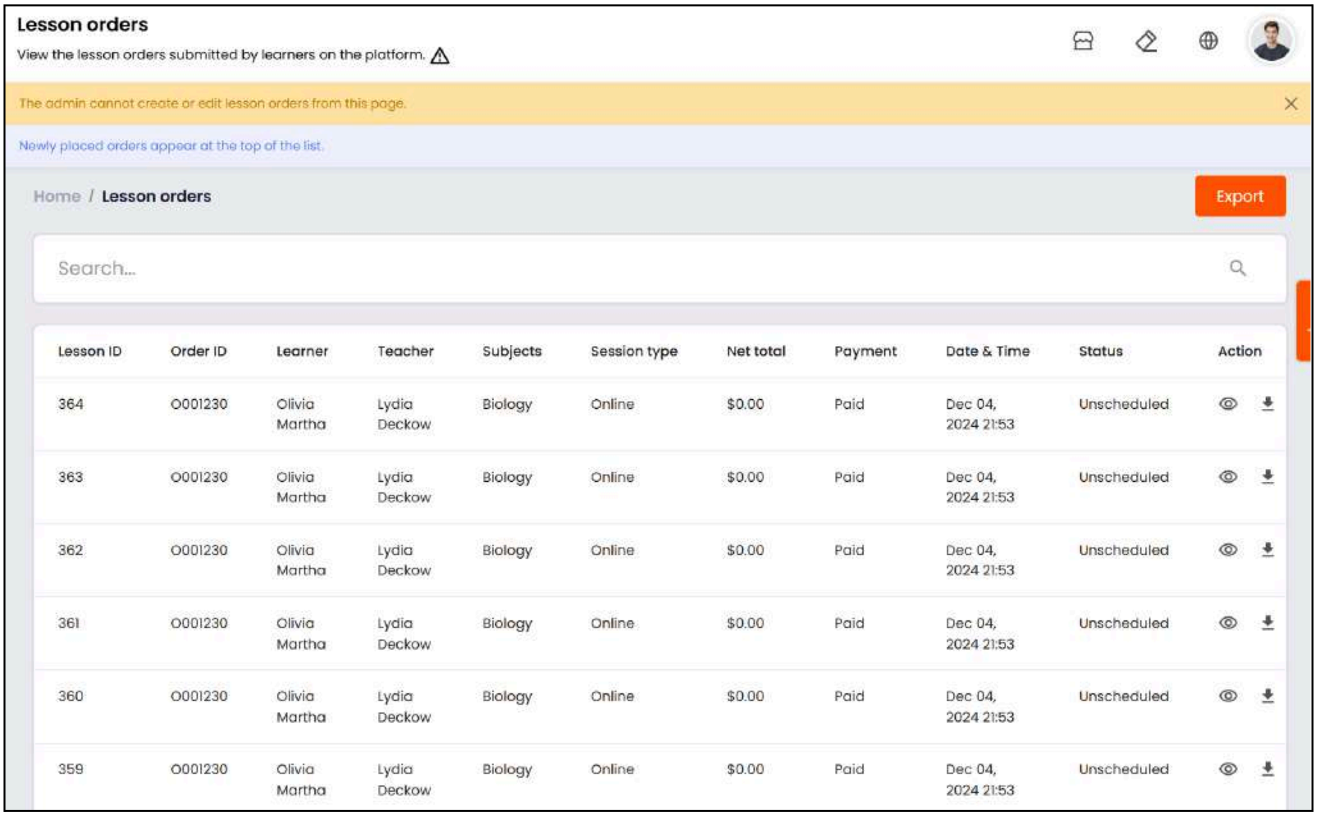
recurring), session type (online or offline), number of lessons, lesson duration, lesson price, admin commission, affiliate commission, and subject.

Click the **View lesson order** link to navigate to the [Lesson orders](#) page and view the number of lessons included in this order, along with its details (as shown below).



You can also perform various actions on this page, similar to those on the [Lesson orders](#) page.

Recurring lesson order details

A recurring lesson order lets the learner select the number of lessons and slots within a 4-week period, and the order is automatically renewed after 4 weeks until canceled by the learner or teacher. For example, if a learner books 4 lessons every Sunday for 4 weeks, the order renews every 4 weeks with the same selection, making it a [recurring lesson order](#).

In contrast, a standard lesson order only requires selecting the session type and the number of lessons, where the lessons can be scheduled anytime before the teacher stops offering the lesson. For more details on the difference, refer to [Recurring lesson orders](#).

Recurring lesson details

Recurring lesson start date : Aug 23, 2024 04:32

Recurring lesson end date : Sep 20, 2024 04:32

Teacher name : Reuben Kreiger

Teacher email : reuben.kreiger@dummyid.com

Teacher ID : 18

Teacher timezone : UTC -08:00 America/Vancouver

Lesson type : Recurring Lessons

Session type : Online

No. of lessons : 4

Lesson duration(in mins) : 30 Mins/Per lesson

Lesson price : $37.00/Per lesson

Admin commission : $0.00

Affiliate commission : $0.00

Subject : Biology

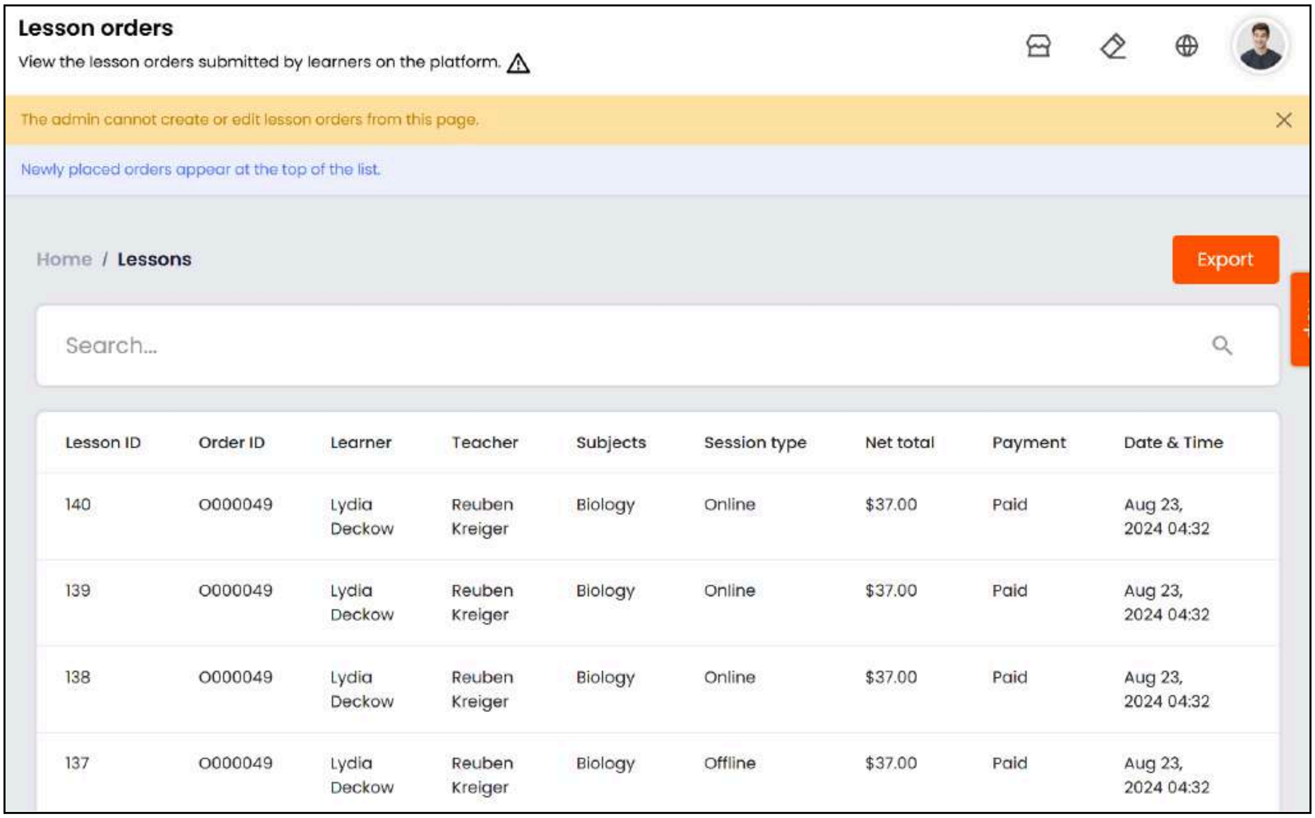
View lesson order

View recurring lesson order

For recurring lesson order types, the section is labeled as Recurring lesson details.

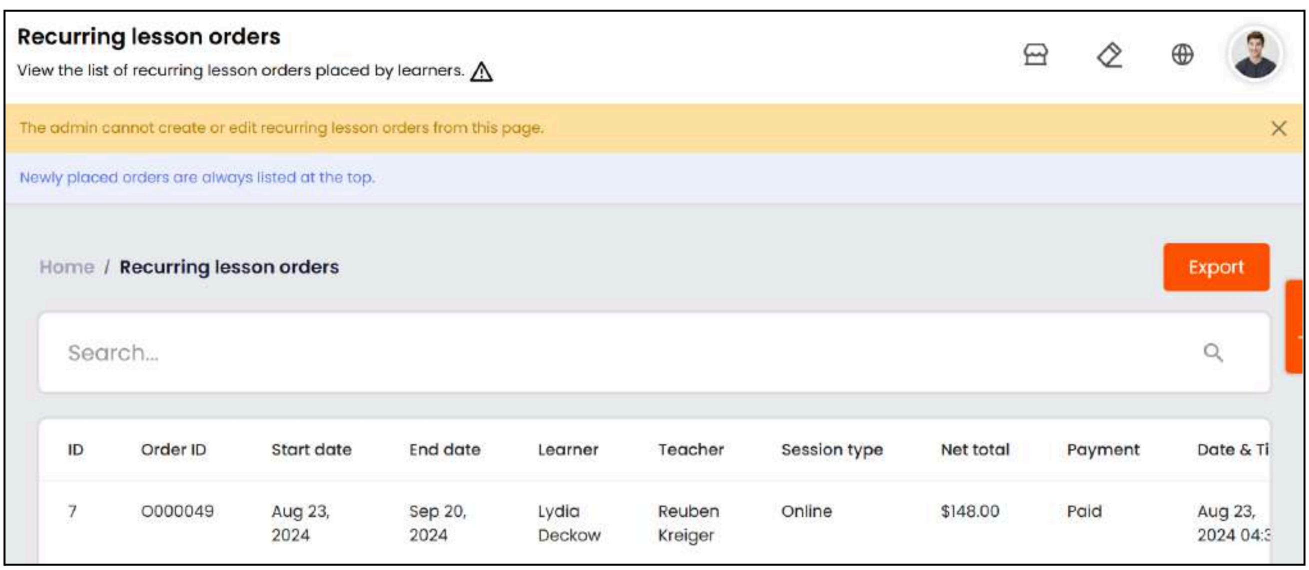
It includes information such as the recurring lesson start date, end date, teacher name (the teacher conducting the lesson), teacher email, teacher ID, teacher timezone, lesson type (will always be recurring, in this case), session type (online or offline), number of lessons, lesson duration, lesson price, admin commission, affiliate commission, and subject.

Click the **View lesson order** link to navigate to the Lesson orders page and view the number of lessons included in this order, along with its details (as shown below).



You can also perform various actions on this page, similar to those on the **Lesson orders** page.

Below this link, there is another link. Click the **View recurring lesson order** link to navigate to the Recurring lesson orders page and view the respective recurring lesson order details (as shown below).



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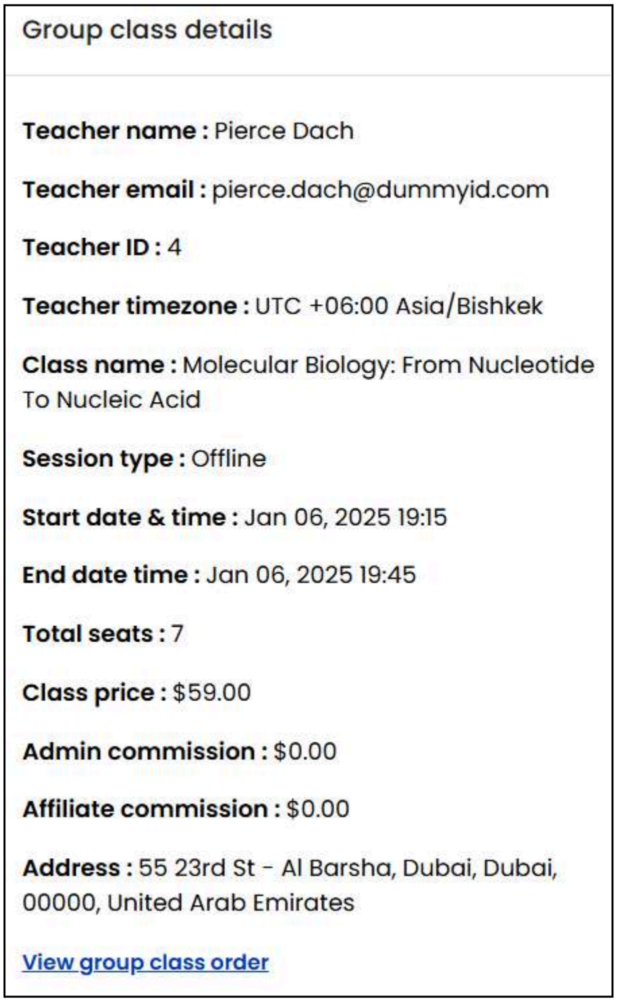
You can also perform various actions on this page, similar to those on the Recurring lesson orders page.

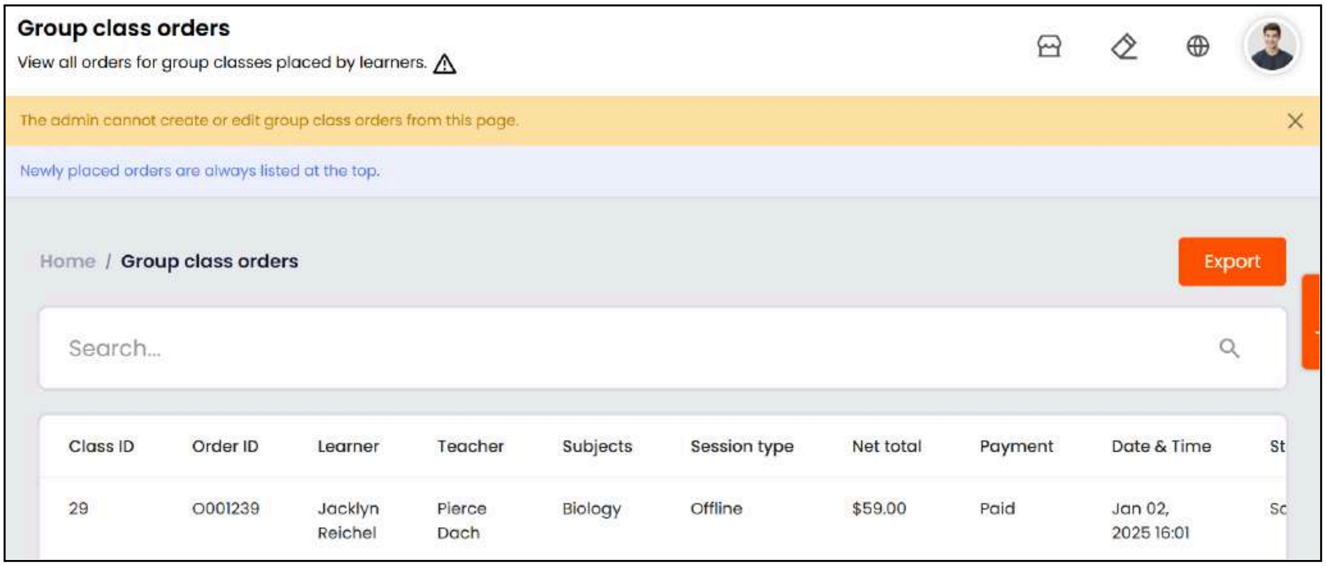
Group class details



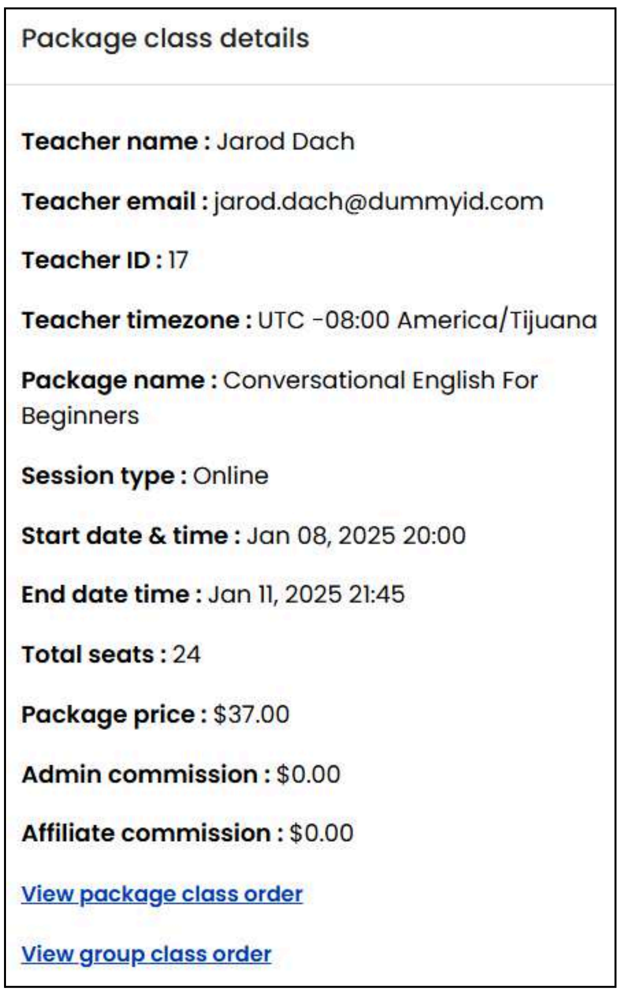
For group class order types, the section is labeled as Group class details.

It displays information such as the teacher name, teacher email, teacher ID, teacher timezone, class name, session type (online or offline), start date & time, end date & time, total seats, class price, admin commission, affiliate commission, and address (visible only for offline sessions).

Click the **View group class order** link to navigate to the Group class orders page and view the group class order details (as shown below). You can also perform various actions on this page, similar to those on the Group class orders page.



Package class details



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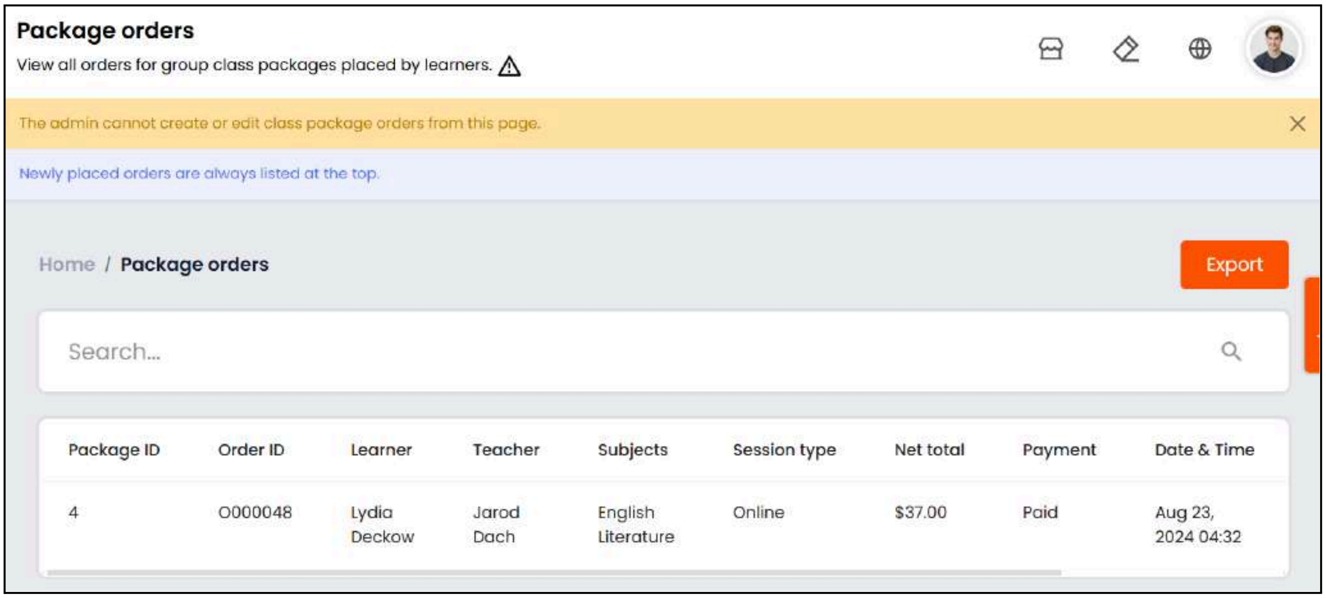
For package class order types, the section is labeled as Package class details.

It displays information such as the teacher name, teacher email, teacher ID, teacher timezone, package name, session type (online or offline), start date & time, end date & time, total seats, package price, admin commission, affiliate commission, and address (visible only for offline sessions).

Click the **View package class order** link to navigate to the [Package orders]() page and view the package order details (as shown below).



You can also perform various actions on this page, similar to those on the [Package orders]() page.

Click the **View group class order** link to navigate to the [Group class orders]() page and view classes under this order (as shown below).

You can also perform various actions on this page, similar to those on the [Group class orders]() page.

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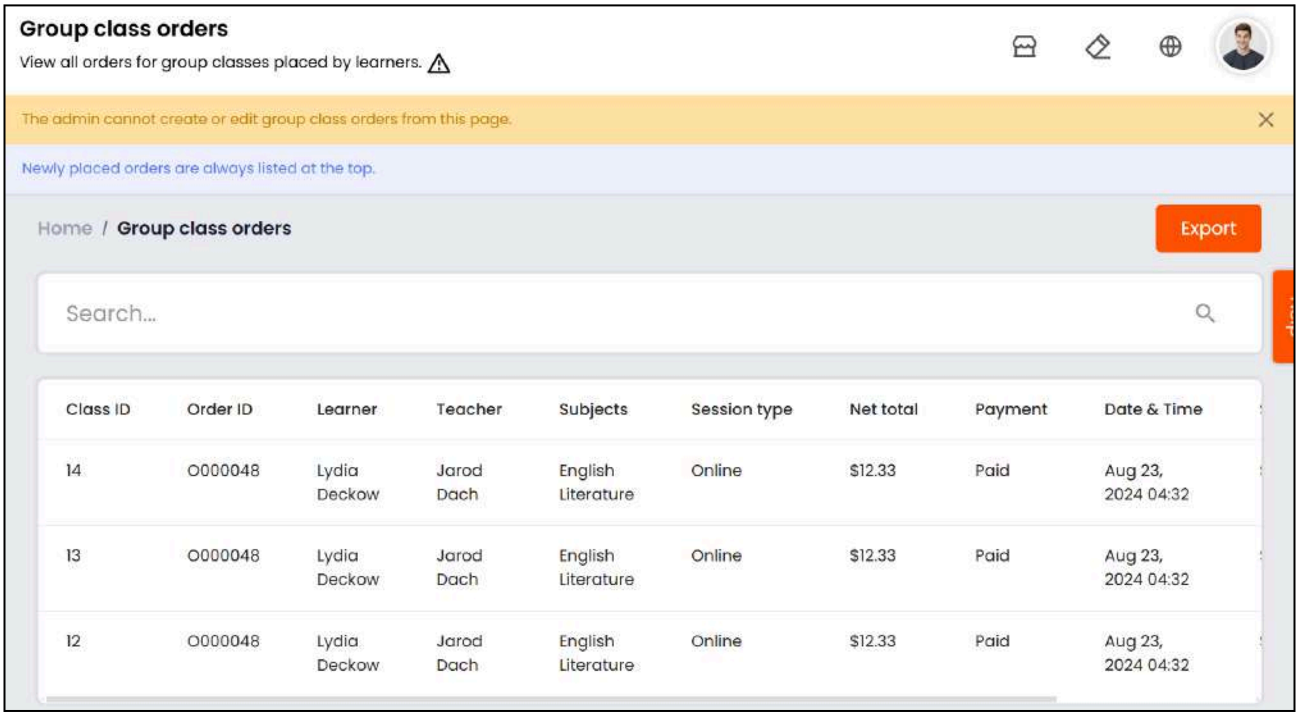
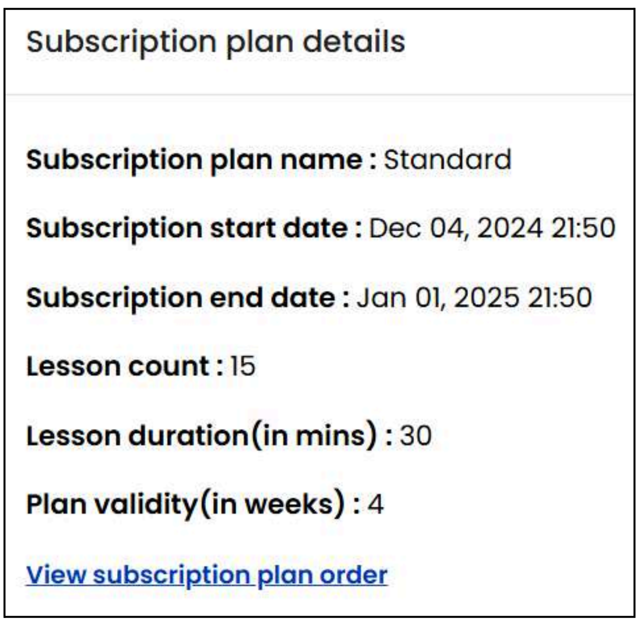


Subscription plan details



*Learners can place this type of order only if the subscription feature is enabled in **Settings > System configurations > System**.*

For subscription plan order types, the section is labeled as Subscription plan details.

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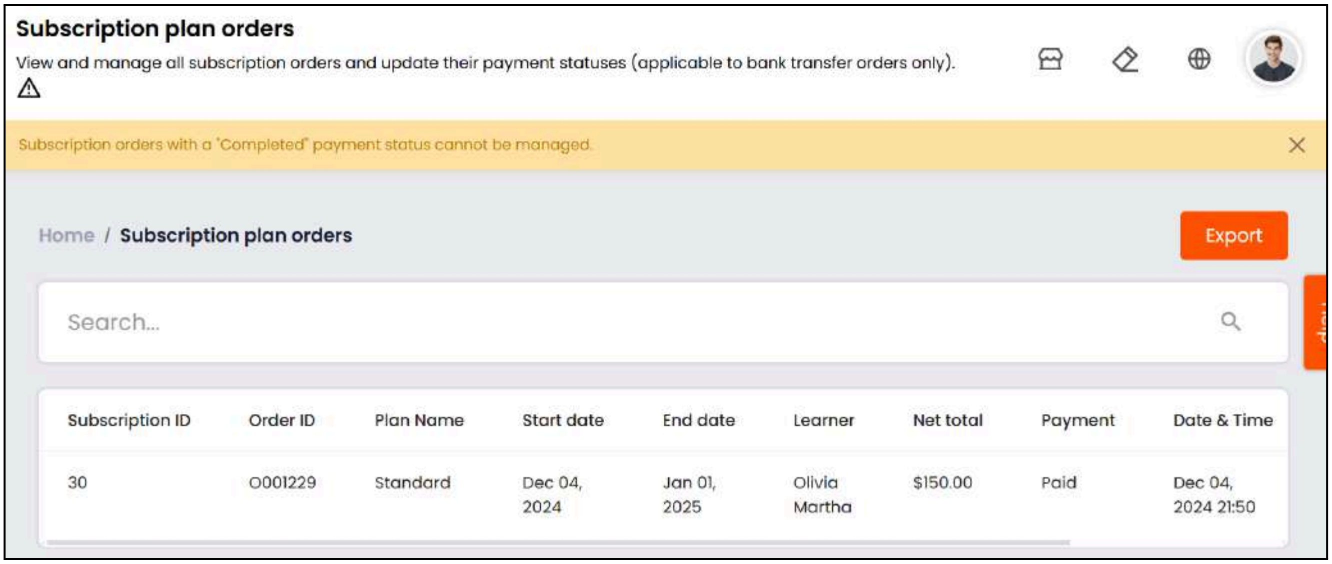
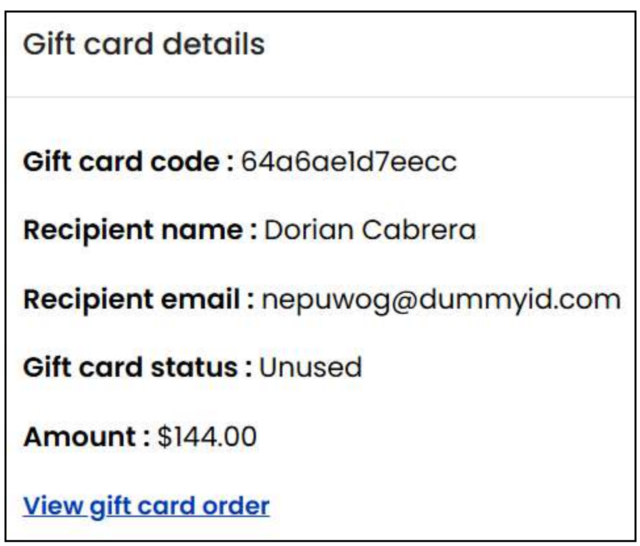
It displays information such as the subscription plan name, subscription start date, subscription end date, lesson count, lesson duration, and plan validity.

Click the **View subscription plan order** link to navigate to the [Subscription plan orders]() page and view the subscription plan details (as shown below).



You can also perform various actions on this page, similar to those on the [Subscription plan orders]() page.

Gift card details



For gift card order types, the section is labeled as Gift card details.

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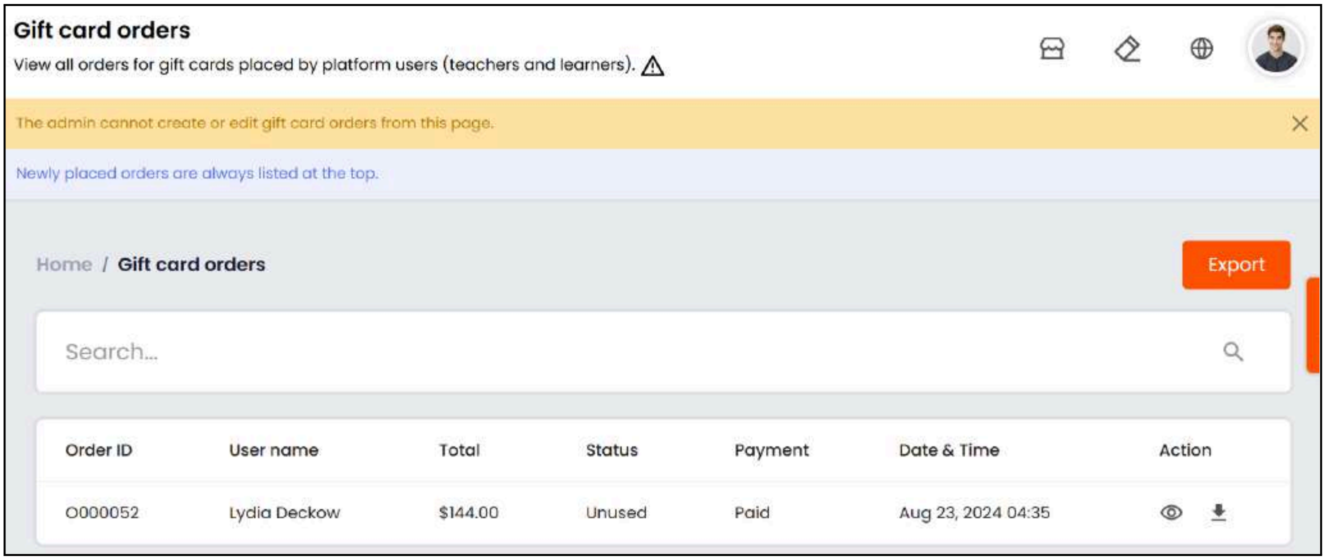
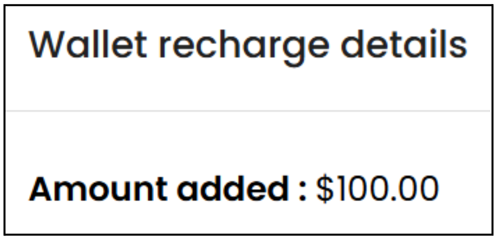
It displays information such as the gift card code, recipient name, recipient email, gift card status, and amount.

Click the **View gift card order** link to navigate to the [Gift card orders](#) page and view the gift card details (as shown below).



You can also perform various actions on this page, similar to those on the [Gift card orders](#) page.

Wallet recharge details



For wallet recharge order types, the section is labeled as Wallet recharge details. It only displays the amount added.

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e. Order payment history

Order payment history

Date added	Txn ID	Payment method	Amount	Gateway response
Jan 14, 2025 13:55	302	Wallet	$996.00	{"usrtxn_id":302,"usrtxn_type":5,"usrtxn_user_id":114,"usrtxn_amount":"-996.00","usrtxn_datetime":"Jan 14, 2025 08:25 UTC","usrtxn_comment":"Course ordered: ID O001243"} Show less

This section displays the order payment history in a table format. The table includes the following details:

- **Date added:** The date of payment
- **Txn ID:** The transaction ID
- Payment method
- Amount
- **Gateway response:** If the payment is completed through the platform, the response is provided by the payment gateway. For manual or offline payments, this column shows the comment added during the manual transaction entry.

Consider these two exceptions:

Exception 1

For orders where users have selected the bank transfer payment method and provided transaction details, the table lists the transaction details entered by the user.

Order payment history

Date added	Txn ID	Payment method	Amount	Gateway response
Jan 22, 2025 10:25	8997766657786	Bank transfer Approve | Decline	$1,000.00	Done, please confirm.

And under the **Payment method** column, **Bank transfer** is displayed along with two action links:

- **Approve:** Select this option to approve the transaction after confirming the payment has been received.

  Once approved, "**Approved**" is displayed below Bank transfer, and a new line is added to the transaction table (as shown in the image below).

  Order payment history

Date added	Txn ID	Payment method	Amount	Gateway response
Jan 21, 2025 14:24	89909766655777	Bank transfer (Approved)	$100.00	Done, please update.
Jan 21, 2025 14:53	89909766655777	Bank transfer	$100.00	{"bnktras_id":8,"bnktras_order_id":1244,"bnktras_amount":"100.00","bnktras_txn_id":"89909766655777","bnktras_status":0,"bnktras_response":"Done, please update.","bnktras_datetime":"Jan 21, 2025 08:54 UTC"} Show less

  *You can also manually enter the transaction details through the [Order payments]() section, instead of clicking **Approve**.*

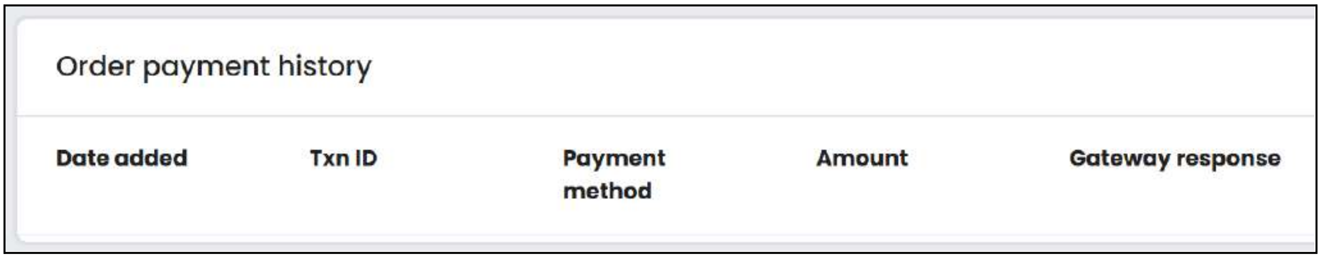
- **Decline:** Select this option to decline the transaction if the payment has not been received. Once done, "**Declined**" will appear below Bank transfer.

  In this case, the user must make the payment again (ensuring it is processed correctly and sent to the right destination after contacting the admin for the appropriate payment method details). Users can pay via any method outside the platform, including PayPal, among others.

  Once the payment is made, the user must share the transaction details with you (the admin). You can then update the payment information through the [Order payments]() section.

Exception 2

If the payment process is interrupted, regardless of the selected payment method, no transaction will appear in this table.

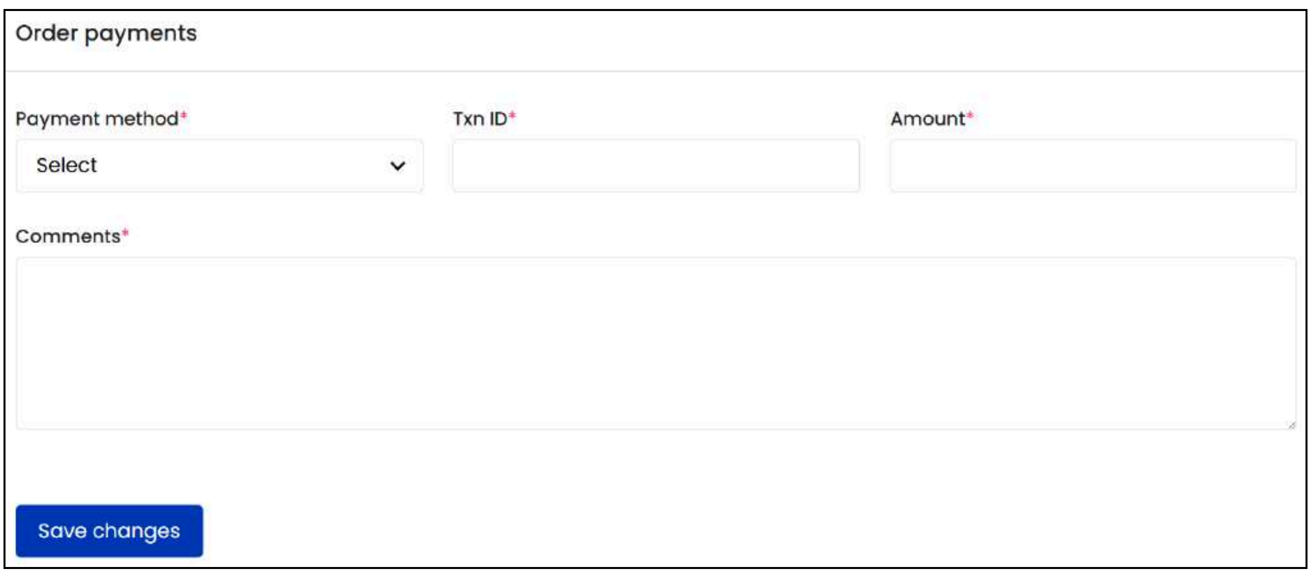


In such cases, the order status will remain “**In process**,” and the payment status will be “**Unpaid**.”

If the customer makes a payment using any method outside the platform (i.e., they send the payment directly to you without completing the platform's checkout process) and informs you about it, update the payment transaction details in the [Order payments](#) section (explained below).

Once the transaction details are updated, this table will reflect the recorded payment.

f. Order payments



This section is visible only for orders with an ***in process*** *status and an* ***unpaid*** *payment status, typically in cases of bank transfers.*

An order is marked as ***unpaid*** *when the payment process is interrupted or left incomplete by the user.*

Update the following fields to add the transaction entry:

- **Payment method*:** Select the payment method used by clicking the field and choosing from the options available in the dropdown list.

  *Only the payment methods activated by you under **Settings** > [Payment methods](#) will be available.*

- **Txn ID*:** Enter the transaction ID for the received payment.

- **Amount*:** Enter the payment amount.

  Ensure that the amount matches the order total, as partial payments are not allowed. If the entered amount differs from the order total, an error message will appear below the field, and you won't be able to proceed.

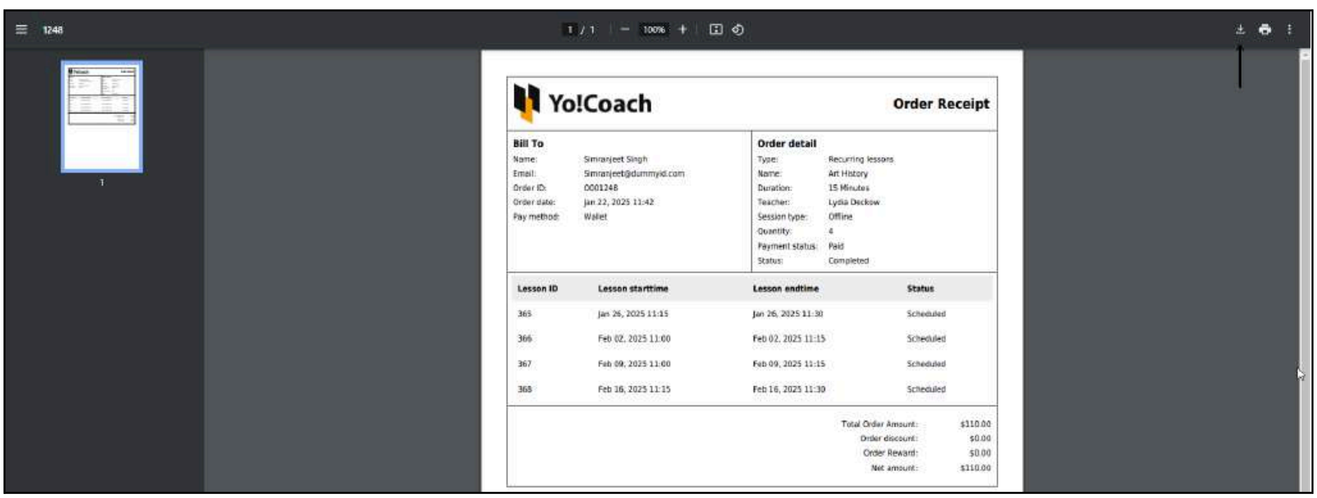
- **Comments*:** Add any relevant comments regarding the transaction. These comments will be displayed under the **Gateway response** column in the transaction table within the [Order payment history](#).

Once completed, click **Save changes**.

The payment transaction will then be added to the [Order payment history](#) section. Additionally, the section will disappear, the payment status will update to **paid**, and the order status will change to **completed**.

ii. Download invoice

Click this to **view** and **download** the order invoice. The invoice will open in PDF format in a new tab.

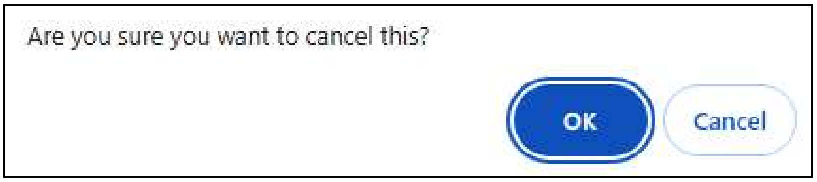


Review the invoice and click the **Download** button in the upper-right corner to save the PDF to your system.

iii. Cancel order

This button appears next to orders with the order status as **in process**, which occurs when an order has been placed but the payment is either pending or in progress.

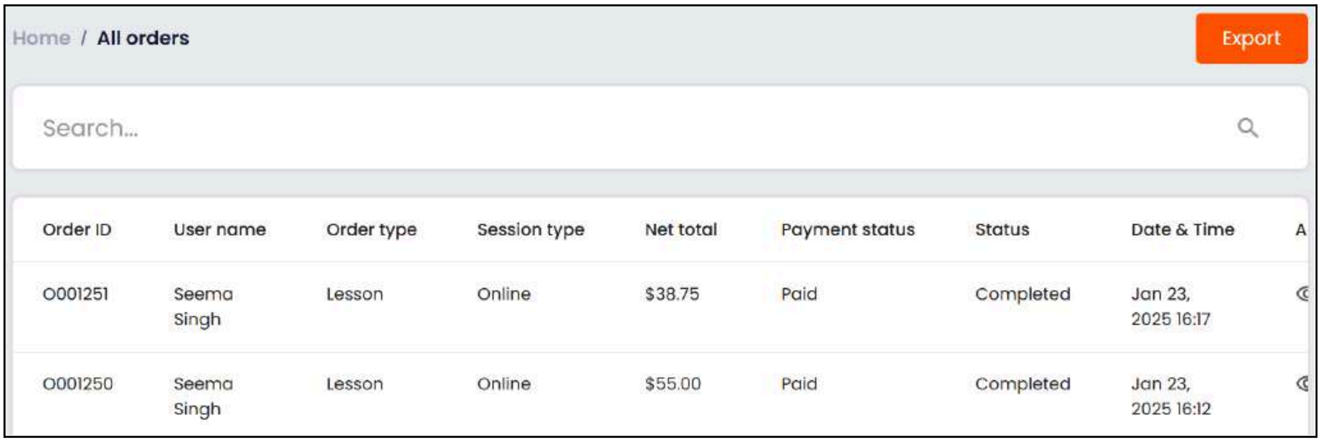
Click this button to cancel the order.



A warning message will prompt you to confirm your action. Click **OK** to confirm or **Cancel** to dismiss.

Search for an order

Use the search functionality at the top of the list to find a specific order.



Click the search bar or to expand it. Click or the search bar again to collapse the section.

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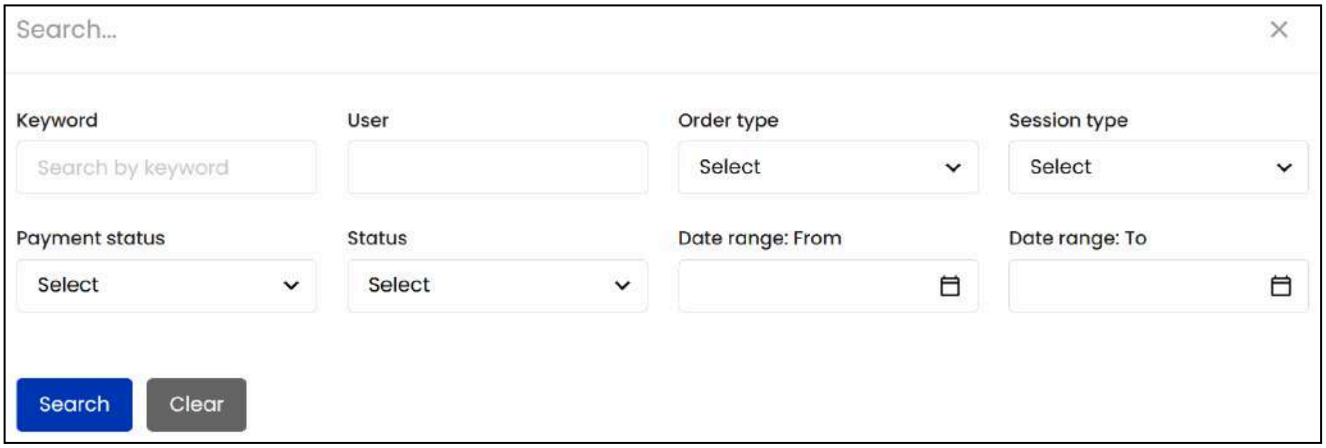
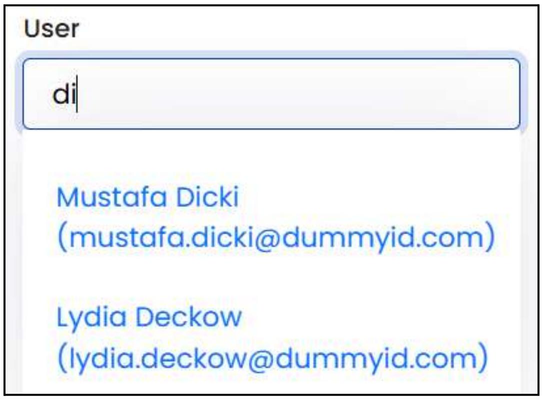


There are several filters that help narrow down the search. Each field is explained below:

- **Keyword:** Enter the order ID you are searching for in this field.
- **User:** Enter the user who placed the order.

  Place the cursor in the field and start typing. As you type, a list of matching results will appear.

  Select the applicable option.

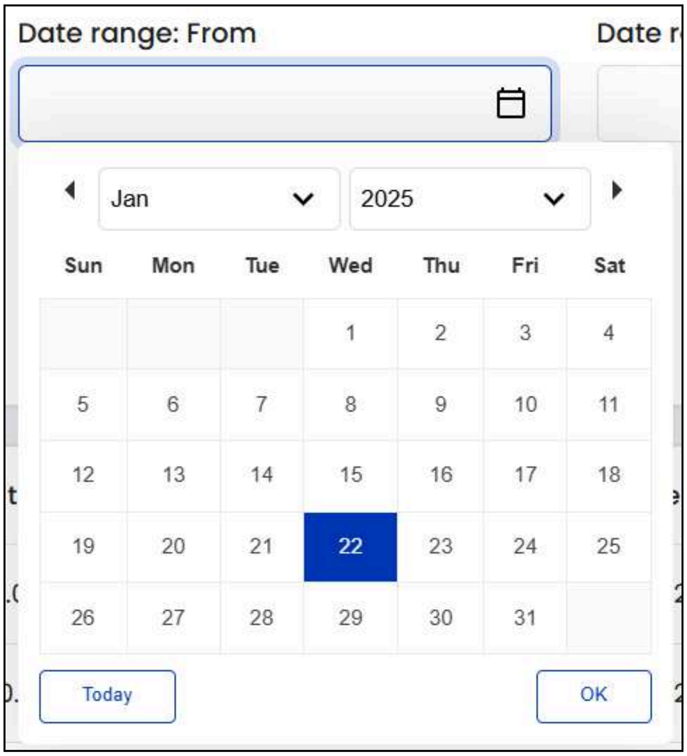
- **Order type:** Click the field and select the order type from the dropdown list from the options—lessons, recurring lessons, subscription plan, group classes, course, packages, gift card, or wallet recharge.
- **Session type:** Click the field and select the session type from the available options:
  - Online
  - Offline
- **Payment status:** Click the field and select the payment status from the available options:

- Unpaid
- Paid

- **Status:** Click the field and select the order status from the available options:
  - Completed
  - In process
  - Canceled

- **Date range: From:** To view orders placed on a specific date, select the desired date in this field.

  To filter the orders placed within a date range, select the start date by clicking the field. A calendar will appear; choose the date, and it will be added to the field.



  Use the **Today** button to select today's date and **Ok** to close the calendar.

- **Date range: To:** Select the ending date of the range in this field.

  *The **Date range: From** value must always be an earlier date, and the **Date range: To** value must be later than the date selected in the **Date range: From** field.*

  *For example, if the **Date range: From** is 09/24/2020, the **Date range: To** must be a date after this, such as 09/25/2020 or any future date. If incorrect dates are entered, no results will be displayed in the list.*

Search for an order by filling in a single field or multiple fields. To view orders placed within a specific date range, use the date fields.

After filling in the desired fields, click **Search** to display the results. Click **Clear** to reset all fields and start a new search.

Export orders data

To export the orders data from this page, click **Export** from the upper-right corner.

The data will be downloaded as a `.csv` file (Comma-Separated Values), which can be used for backups or external purposes.

A success message will appear once the download is complete.

To export specific orders data, use the [search bar] to apply the necessary filters and define the criteria.

After setting the filters and clicking **Search** to view the results, click **Export** to download the filtered data as a `.csv` file.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
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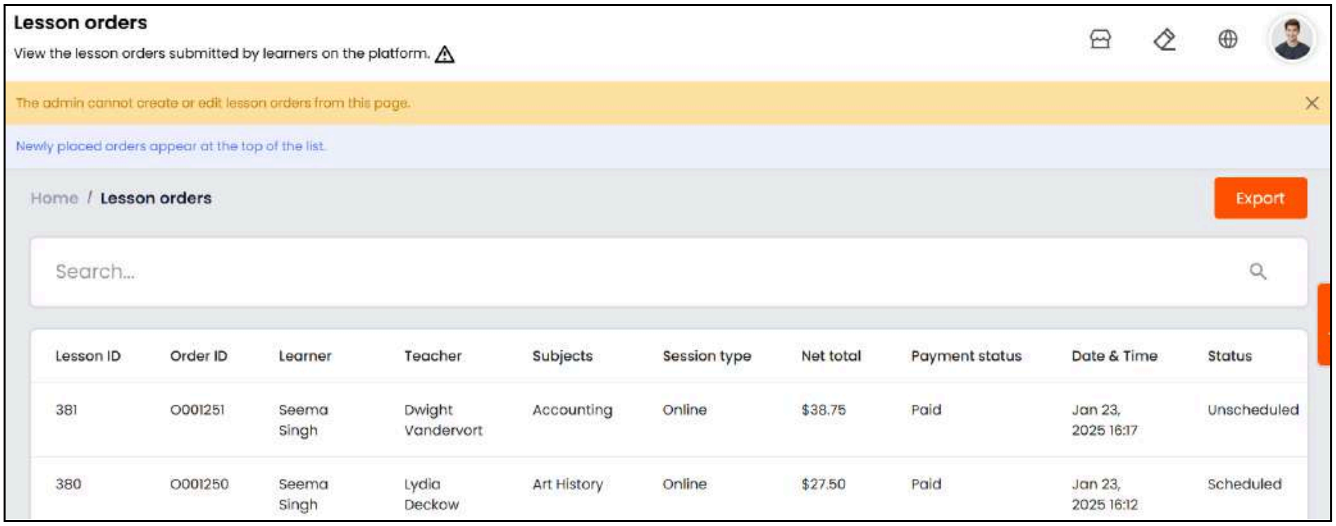
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

7.2 Lesson orders

Each lesson purchased on the platform generates an order, which is listed under this submodule. You can view the order details and download the invoice as needed.

Kindly note that this submodule is limited to tracking orders, viewing their details, and downloading invoices.

You can take actions like canceling the order or adding the transaction details, against unpaid lesson orders and bank transfer lesson orders under the [All orders](#) submodule.



The list will be empty if you recently purchased the platform and chose not to include dummy content provided by FATbit during installation, or if no orders have been placed yet.

Important things to note

To better understand this submodule and its functionality, here are some key points:

What is a lesson & how is a lesson booked?

A lesson is a one-to-one session conducted by a teacher for a learner. Lessons can be offered both online and offline.

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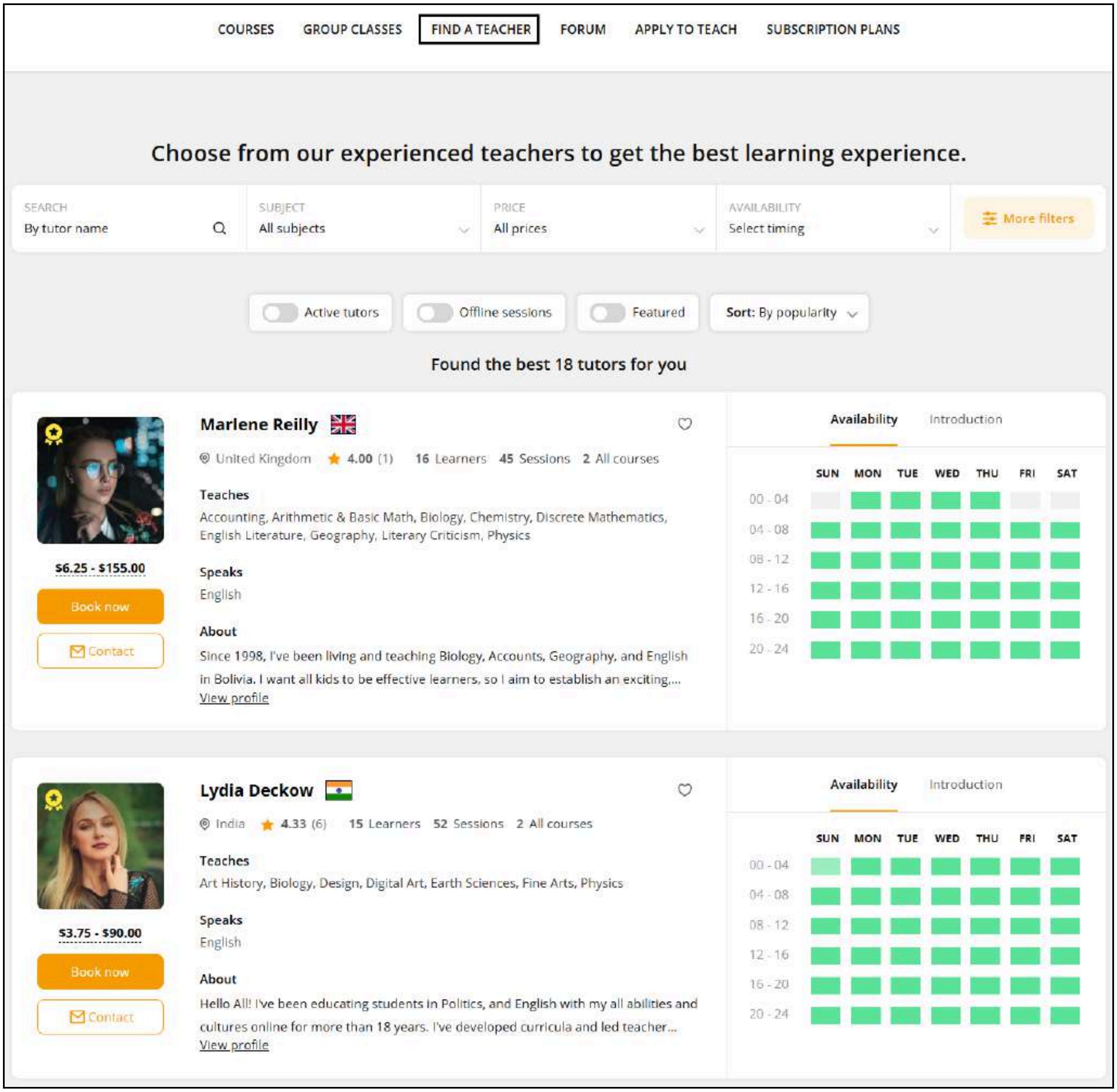
Booking a lesson

Learners can book one or more lessons for a specific subject by navigating to the **Find a teacher** page on the front end.



They can use filters such as teacher, subject, price range, availability, and more to refine their search.

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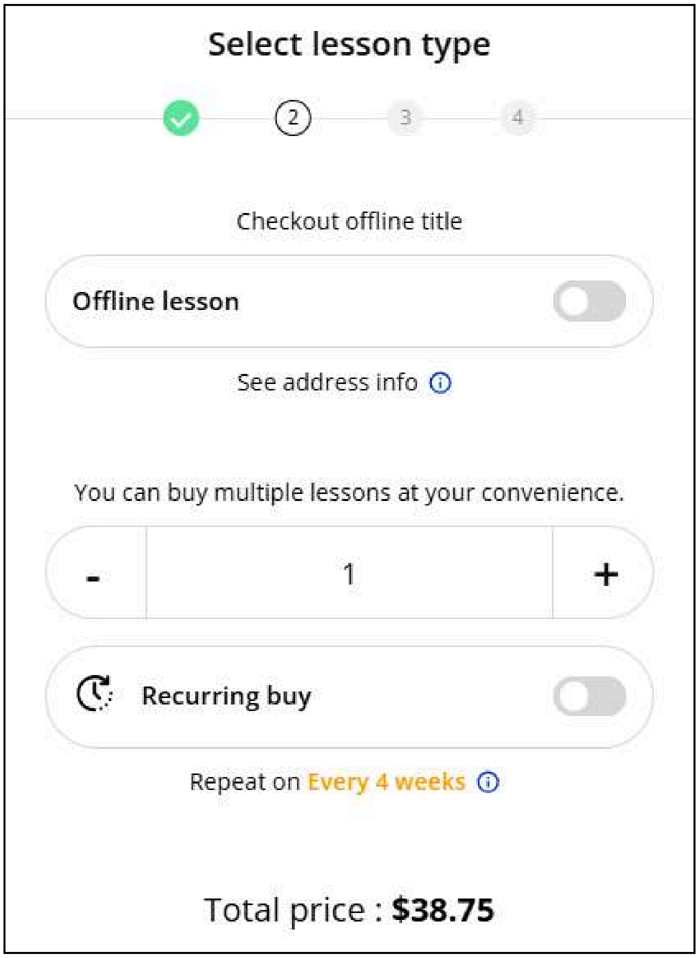
Once a suitable teacher is identified, learners can click **Book now** to proceed. During the booking process, they can select the session type (online or offline) and specify the number of lessons they wish to purchase.



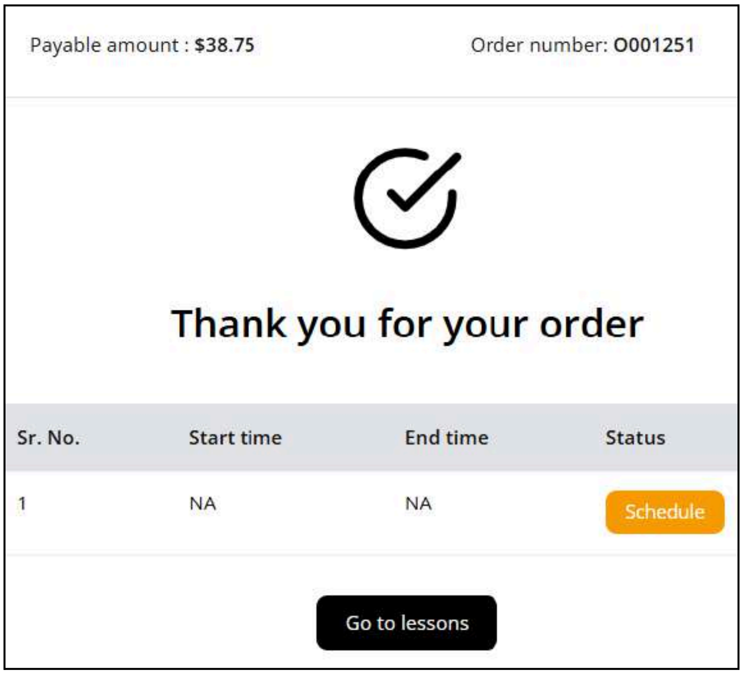
Types of lesson orders

Learners can place one of three types of orders (for lessons):

1. Lesson order

A simple lesson order, allowing the learner to purchase a set number of lessons, which can be used anytime from the purchase date until the teacher discontinues offering the lesson.

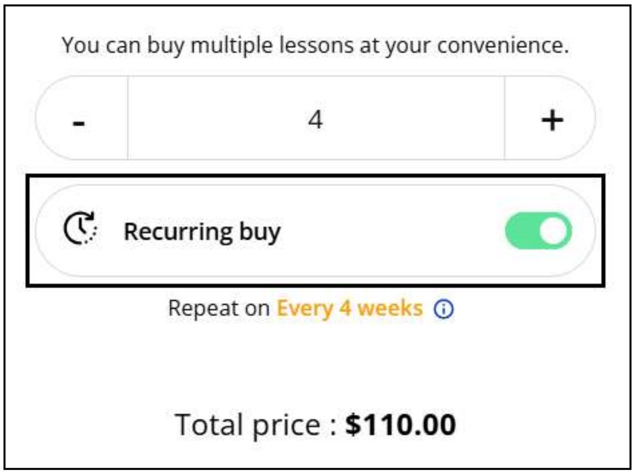
The learner is not required to schedule sessions at the time of purchase; scheduling can be done later at their convenience (as shown in the image below).



For example, if a learner purchases 6 lessons, they can use 2 sessions in the first month, 1 session in the next month, and so on, based on their preference.

2. Recurring lesson order

If the learner wants to receive one or more lessons from the same teacher on a recurring basis every 4 weeks, they can place a recurring lesson order by turning on the recurring buy toggle switch.



For example, if the learner purchases 4 lessons and activates the recurring buy feature, in the next step, they will need to select 4 time slots (schedule the sessions) within the next 4 weeks for their lessons.

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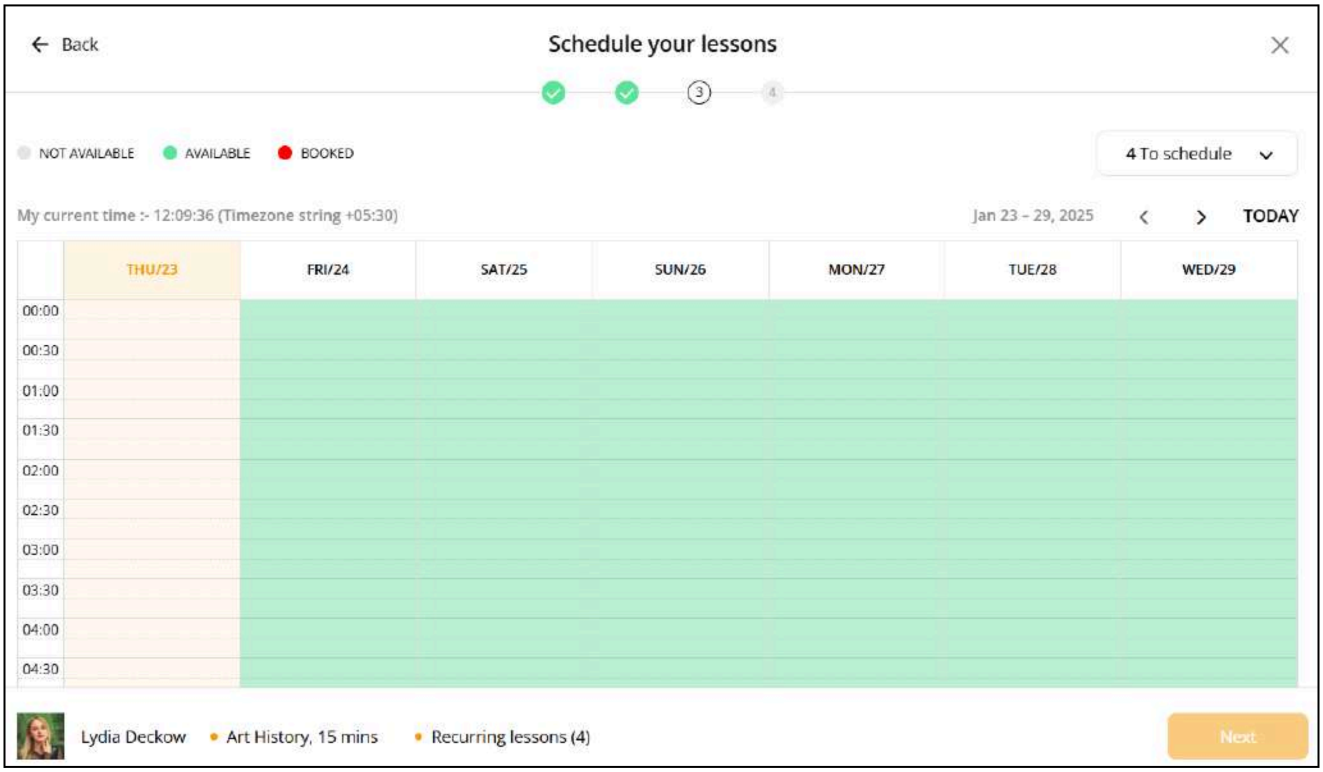


In this case, learners cannot select a time slot that is more than 4 weeks away.

Once the 4-week period ends, the same order will automatically renew, with the same number of lessons and selected time slots.

This process will continue until the learner cancels the order or the teacher stops offering the lessons.

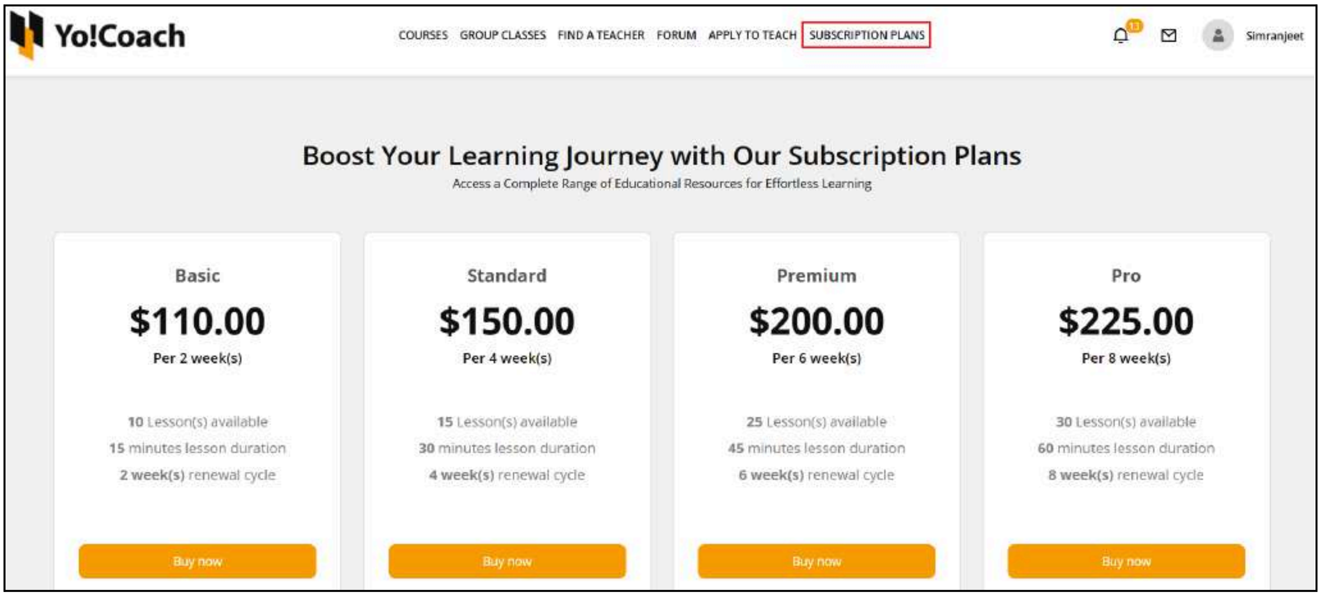
3. Subscription plan orders

*This order type is applicable only if the subscription feature is activated on the platform under the **Admin panel > Settings > System configurations > System**.*

Once the subscription plan feature is activated, learners can purchase a subscription plan, which applies exclusively to lessons.

The plan offers a set number of lessons that learners can use within a defined period, such as 2 weeks, 1 month, or 6 weeks.

To get started, a learner must first purchase a subscription plan from the **Subscription plans page** on the front end by selecting a plan and clicking **Buy now** to complete the purchase.



Once the subscription plan is purchased, the learner can book lessons as needed.

For example, if the learner purchases the Basic subscription plan (as shown in the image above), they will receive 10 lessons, each 15 minutes long. These lessons can be booked within a 2-week period, after which the subscription plan will automatically renew. And the unused lessons will expire at the end of the 2 weeks.

The process to book a lesson is the same as booking a regular lesson. The only difference is that the learner won't see the recurring lesson feature, and won't have to make any payment as the subscription plan covers it.

Learners can book lessons for multiple subjects as long as the total number of lessons does not exceed the plan's limit. Lessons must be booked within the plan's validity period, as any unused lessons will expire once it ends.

After using all the lessons in a subscription plan, learners can then place either a recurring lesson order or a regular lesson order.

Lesson orders page

This submodule (Lesson orders) displays all lesson orders, while the following submodules show Recurring lesson orders and Subscription plan orders.

For recurring lesson orders, lessons scheduled within the 4-week period are also listed as individual lesson orders. For example, if a learner books 4 lessons within

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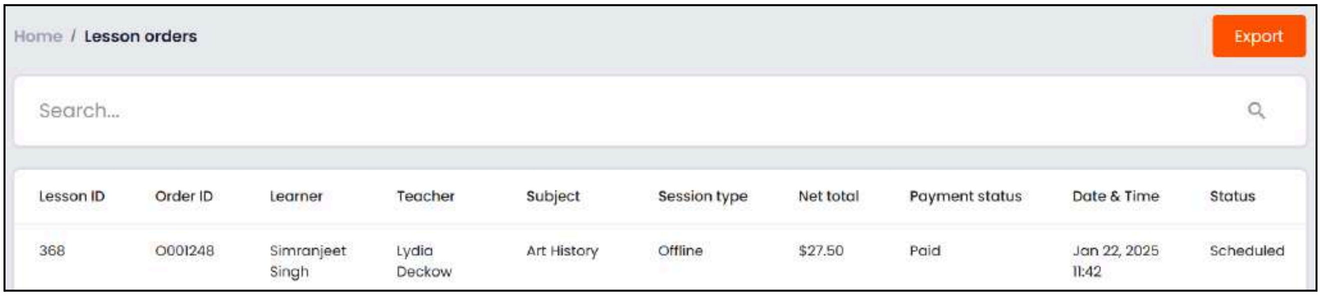
a recurring lesson order, the recurring order will display the overall details, but each lesson will be listed separately on the lesson orders page.

For subscription plan orders, lessons booked through the plan will be listed as individual lesson orders under this submodule.

Manage the lesson orders list



The list displays the following details for each lesson order:

- **Lesson ID:** A unique identifier assigned to every lesson order.
- **Order ID:** A unique identifier assigned to every order.
- **Learner:** The name of the learner who placed the order.
- **Teacher:** The name of the teacher who is offering the lesson.
- **Subject:** The subject of the lesson that has been booked.
- **Session type:** The session type associated with the order, which can be either online or offline.
- **Net total:** The total amount paid for the order, calculated by subtracting any discounts applied from the total order amount.
- **Payment status:** This defines the payment status of the order, which can be either paid or unpaid.
- **Date & Time:** The date and time when the order was placed.
- **Status:** This defines whether the session has been scheduled, not scheduled yet (unscheduled), completed, or canceled.

Recurring lesson orders, whose lesson orders are displayed in this submodule, always include scheduled lessons (unless those lessons have been completed or

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canceled). Regular lesson orders in this submodule, however, may include unscheduled lessons (unless they have been scheduled, completed, or canceled).

Action buttons

Under the **Action** column, each entry includes two action buttons, allowing you to perform specific actions.

The functions of each button are explained in detail below:

i. View

Click the button next to a lesson order to view its details. A drawer will appear, showing the lesson order details.

The drawer displays the following information:

- **Learner name:** The name of the learner who placed the order.
- **Teacher name:** The name of the teacher providing (or who has provided) the lesson.
- **Subject:** The subject being taught in the session.
- **Session type:** The type of session booked by the learner, either online or offline.
- **Status:** The current status of the lesson, which can be completed, canceled, scheduled, or unscheduled.

- **Start time:** The start date and time—scheduled beginning of the lesson. If no session is scheduled, the value will be NA.

End time:	Oct 14, 2024 15:15
Teacher start time:	Oct 14, 2024 14:45
Teacher end time:	Oct 14, 2024 15:15
Learner start time:	Oct 14, 2024 14:45
Learner end time:	Oct 14, 2024 15:15
Lesson price:	$29.00
Discount:	$0.00
Reward discount:	$0.00
Net amount:	$29.00
Admin commission:	$2.90
Affiliate commission:	$2.90
Teacher paid:	Yes
Lesson reviewed:	No
Issue reported:	No
Refund:	NA
Duration:	30 Mins
Order ID:	View O000001
Lesson ended by:	NA

- **End time:** The end date and time—scheduled ending of the lesson. If no session is scheduled, the value will be NA.

- **Teacher start time:** The date and time the teacher enters the session to begin teaching. If the session has not been conducted yet (when the lesson status is scheduled, unscheduled, or canceled), the value will be NA.

- **Teacher end time:** The date and time the teacher completes the lesson. If the session has not been conducted yet (when the lesson status is scheduled, unscheduled, or canceled), the value will be NA.

- **Learner start time:** The date and time the learner enters the session to attend the lesson. If the session has not been conducted yet (when the lesson status is scheduled, unscheduled, or canceled), the value will be NA.

- **Learner end time:** The date and time the learner completes the lesson. If the session has not been conducted yet (when the lesson status is scheduled, unscheduled, or canceled), the value will be NA.

- **Lesson price:** The price of the lesson as set by the teacher.

- **Discount:** The amount of discount applied on the lesson price, if any.

- **Reward discount:** The reward discount applied on the lesson price, if any.

- **Net amount:** The total amount paid by the learner for the lesson, after applying all discounts.

- **Admin commission:** The amount deducted from the net amount as the admin commission, if applicable.

- **Affiliate commission:** The affiliate commission amount deducted from your account, if applicable. This amount is calculated using the affiliate commission percentage defined by you and the lesson price.

- **Teacher paid:** This defines whether the teacher has been paid for the lesson conducted.

  "**Yes**" means the teacher has been paid. "**No**" means they have not been paid yet. For lessons not conducted or canceled, the value will always be "**No**."

- **Lesson reviewed:** This defines whether the learner has reviewed the lesson.

  "**Yes**" means the learner has given their review. "**No**" means they have not given a review yet. For lessons not conducted or canceled, the value will always be "**No**."

- **Issue reported:** This defines if the learner reported an issue with the lesson to the admin.

  "**Yes**" means the learner reported an issue. "**No**" means no issue was reported. For lessons not conducted, the value will always be "**No**."

- **Refund:** The amount refunded for the lesson, if applicable.

  Refunds are possible only if the lesson was canceled or if the learner reported the lesson and a refund was approved. For cases where no refund is given, the value will be NA.

- **Duration:** The duration of the lesson. Teachers can define the duration of their lessons, and learners can select the duration if options are available.

- **Order ID:** The main order ID of the lesson order created.

  This is a clickable link (**View {order ID}**) that redirects to the respective Order details page, which can also be accessed via the All orders page. Refer to this submodule for details on available actions and displayed information.

- **Lesson ended by:** The name of the teacher or learner who ended the lesson. If the lesson has not been conducted yet, the value will be NA.

Review the details, then click ✕ in the upper-right corner of the drawer to close it.

ii. Download invoice

Click this to **view** and **download** the order invoice.

The invoice will open in PDF format in a new tab.


Yo!Coach **Order Receipt**

Bill To

Name:	Seema Singh
Email:	Seema@dummyid.com
Order ID:	O001251
Order date:	Jan 23, 2025 16:17
Pay method:	Wallet

Order detail

Type:	Lesson
Name:	Accounting
Duration:	15 Minutes
Teacher:	Dwight Vandervort
Session type:	Online
Quantity:	1
Payment status:	Paid
Status:	Completed

Lesson ID	Lesson starttime	Lesson endtime	Status
381	NA	NA	Unscheduled

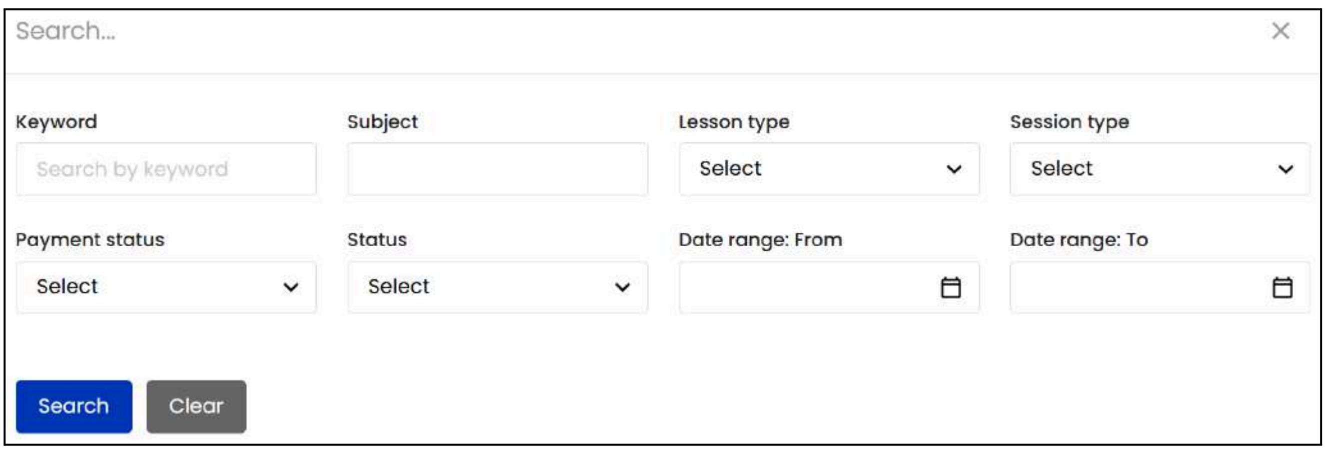
Total Order Amount:	$38.75
Order discount:	$0.00
Order Reward:	$0.00
Net amount:	$38.75

Review the invoice and click the **Download** button in the upper-right corner to save the PDF to your system.

Search for a lesson order

Use the search functionality at the top of the list to find a specific lesson order.

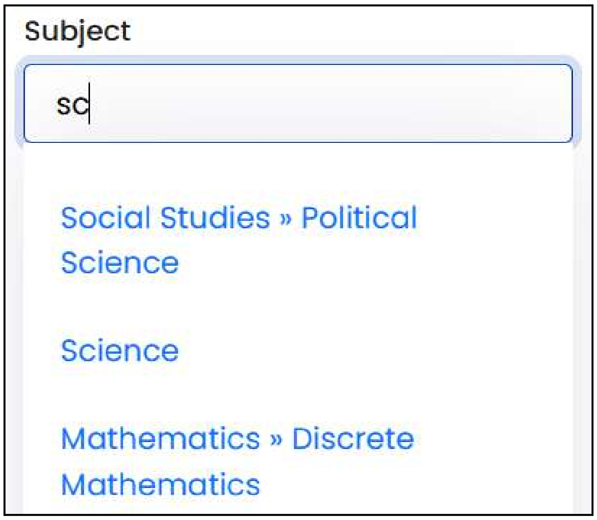
Click the search bar or to expand it. Click or the search bar again to collapse the section.



There are several filters that help narrow down the search. Each field is explained below:

- **Keyword:** Enter the order ID or lesson ID you are searching for in this field. You can also use this field to search for the order using the teacher name or learner name.
- **Subject:** Enter the subject of the lesson you are searching for.

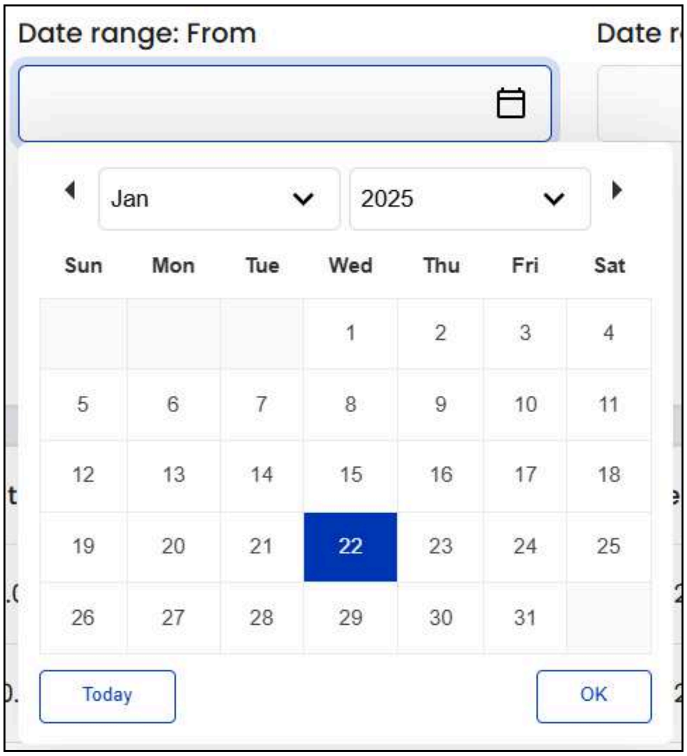
  Place the cursor in the field and start typing. As you type, a list of matching results will appear.



Select the applicable option.

- **Lesson type:** Click the field and select the lesson type from the dropdown list from the options—free trial, regular, and recurring lessons.
- **Session type:** Click the field and select the session type from the available options:
  - Online
  - Offline
- **Payment status:** Click the field and select the payment status from the available options:
  - Unpaid
  - Paid
- **Status:** Click the field and select the lesson status from the available options:
  - Unscheduled
  - Scheduled
  - Completed
  - Canceled
- **Date range: From:** To view lesson orders placed on a specific date, select the desired date in this field.

  To filter the lesson orders placed within a date range, select the start date by clicking the field. A calendar will appear; choose the date, and it will be added to the field.



Use the **Today** button to select today's date and **Ok** to close the calendar.

- **Date range: To:** Select the ending date of the range in this field.

*The **Date range: From** value must always be an earlier date, and the **Date range: To** value must be later than the date selected in the **Date range: From** field.*

*For example, if the **Date range: From** is 09/24/2020, the **Date range: To** must be a date after this, such as 09/25/2020 or any future date. If incorrect dates are entered, no results will be displayed in the list.*

Search for a lesson order by filling in a single field or multiple fields. To view lesson orders placed within a specific date range, use the date fields.

After filling in the desired fields, click **Search** to display the results. Click **Clear** to reset all fields and start a new search.

Export lesson orders data

To export the lesson orders data from this page, click **Export** from the upper-right corner.

The data will be downloaded as a `.csv` file (Comma-Separated Values), which can be used for backups or external purposes.

A success message will appear once the download is complete.

To export specific lesson orders data, use the [search bar] to apply the necessary filters and define the criteria.

After setting the filters and clicking **Search** to view the results, click **Export** to download the filtered data as a `.csv` file.

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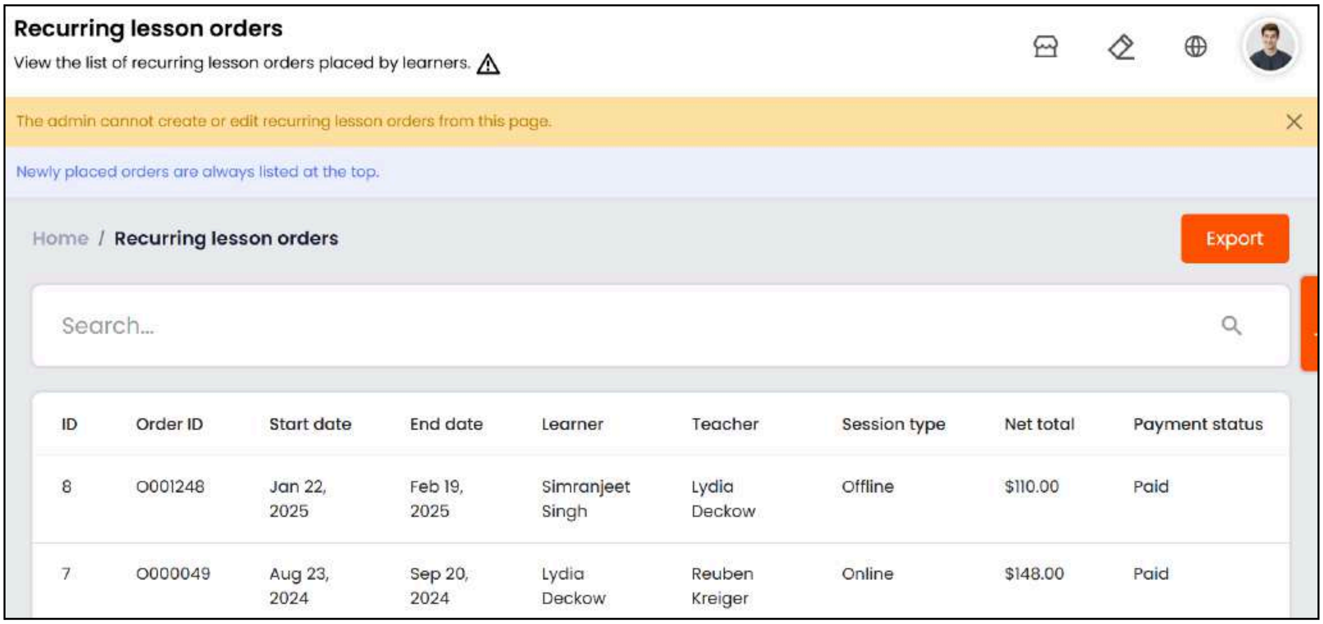
7.3 Recurring lesson orders

Each recurring lesson order placed on the platform is listed under this submodule.

You can view the order details and download the invoice as needed.

Kindly note that this submodule is limited to tracking orders, viewing their details, and downloading invoices.

You can take actions like canceling the order or adding the transaction details, against unpaid recurring lesson orders and bank transfer recurring lesson orders under the [All orders](#) submodule.



The list will be empty if you recently purchased the platform and chose not to include dummy content provided by FATbit during installation, or if no orders have been placed yet.

A recurring lesson order allows learners to select the number of lessons and time slots within a 4-week period. The order automatically renews every 4 weeks unless canceled by the learner or teacher.

For example, if a learner books 4 lessons every Sunday for 4 weeks, the order will renew with the same schedule every 4 weeks, making it a recurring lesson order.

Refer to [What is a lesson & how to book a lesson]() to learn more about this type of order and how it differs from other lesson orders.

Manage the recurring lesson orders list

The list displays the following details for each recurring lesson order:

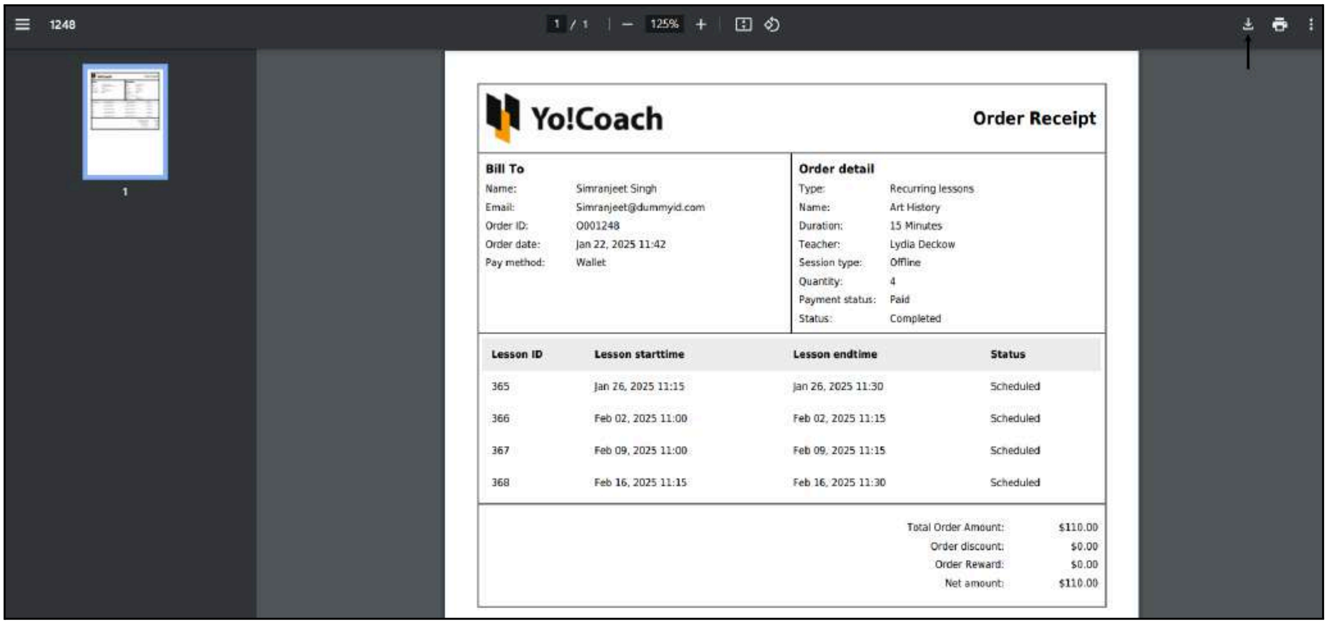
- **ID:** A unique identifier assigned to every recurring lesson order.
- **Order ID:** A unique identifier assigned to every order.
- **Start date:** The date when the recurring lesson order begins, marking the start of a 4-week period.
- **End date:** The date when the 4-week recurring lesson order period ends.
- **Learner:** The name of the learner who placed the order.
- **Teacher:** The name of the teacher who is offering the lessons.
- **Session type:** The session type associated with the order, which can be either online or offline.
- **Net total:** The total amount paid for the order, calculated by subtracting any discounts applied from the total order amount.
- **Payment status:** This defines the payment status of the order, which can be either paid or unpaid.
- **Date & Time:** The date and time when the order was placed.
- **Status:** This defines whether the subscription is active, expired, completed, or canceled.

Action button

There is a single action button next to each entry—**Download invoice** .

Click this to **view** and **download** the order invoice.

The invoice will open in PDF format in a new tab.



Review the invoice and click the **Download** button in the upper-right corner to save the PDF to your system.

Search for a recurring lesson order

Use the search functionality at the top of the list to find a specific recurring lesson order.

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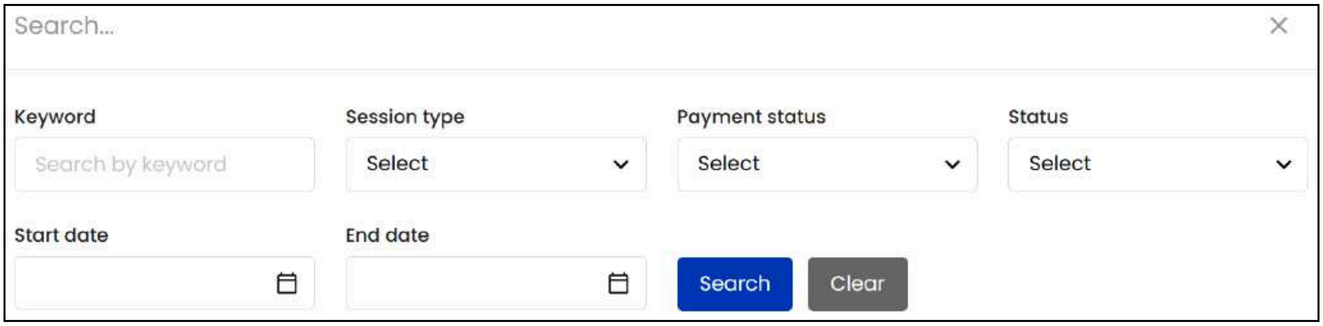
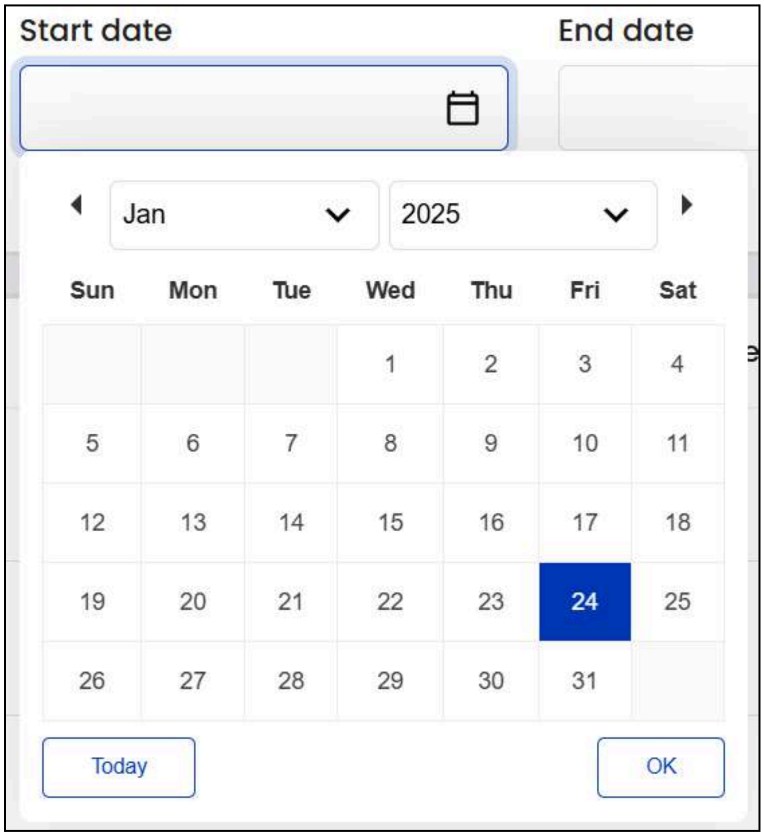
Click the search bar or to expand it. Click or the search bar again to collapse the section.



There are several filters that help narrow down the search. Each field is explained below:

- **Keyword:** Enter the order ID or the recurring lesson ID you are searching for in this field. You can also use this field to search for the order using the teacher name or learner name.
- **Session type:** Click the field and select the session type from the available options:
    - Online
    - Offline
- **Payment status:** Click the field and select the payment status from the available options:
    - Unpaid
    - Paid
- **Status:** Click the field and select the lesson status from the available options:
    - Active
    - Expired
    - Completed
    - Canceled
- **Start date:** To view recurring lesson orders that start on a specific date, select the desired date in this field.

  To filter the recurring lesson orders using their start and end date, select the start date by clicking the field. A calendar will appear; choose the date, and it will be added to the field.



Use the **Today** button to select today's date and **Ok** to close the calendar.

- **End date:** Select the end date in this field.

*The **Start date** value must always be an earlier date, and the **End date** value must be later than the date selected in the **Start date** field.*

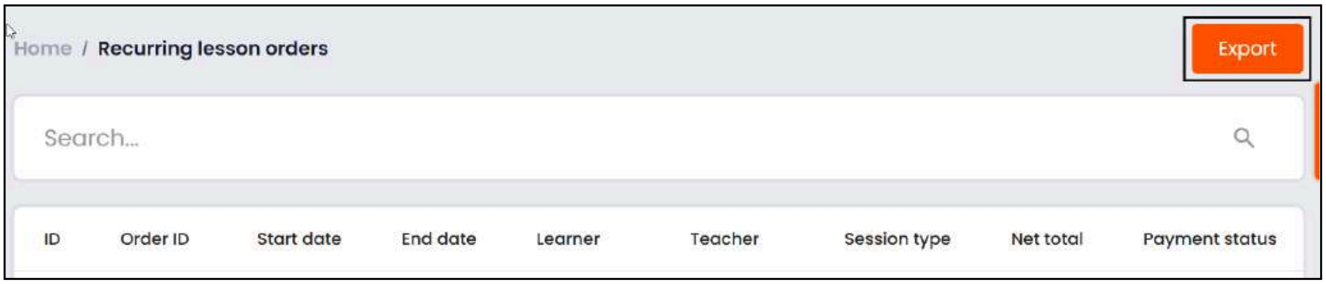
*For example, if the **Start date** is 09/24/2020, the **End date** must be a date after this, such as 09/25/2020 or any future date. If incorrect dates are entered, no results will be displayed in the list.*

Search for a recurring lesson order by filling in a single field or multiple fields. To view the recurring lesson orders using their start date and end date, use the respective date fields.

After filling in the desired fields, click **Search** to display the results. Click **Clear** to reset all fields and start a new search.

Export recurring lesson orders data

To export the recurring lesson orders data from this page, click **Export** from the upper-right corner.



The data will be downloaded as a `.csv` file (Comma-Separated Values), which can be used for backups or external purposes.

A success message will appear once the download is complete.

To export specific recurring lesson orders data, use the [search bar] to apply the necessary filters and define the criteria.

After setting the filters and clicking **Search** to view the results, click **Export** to download the filtered data as a `.csv` file.

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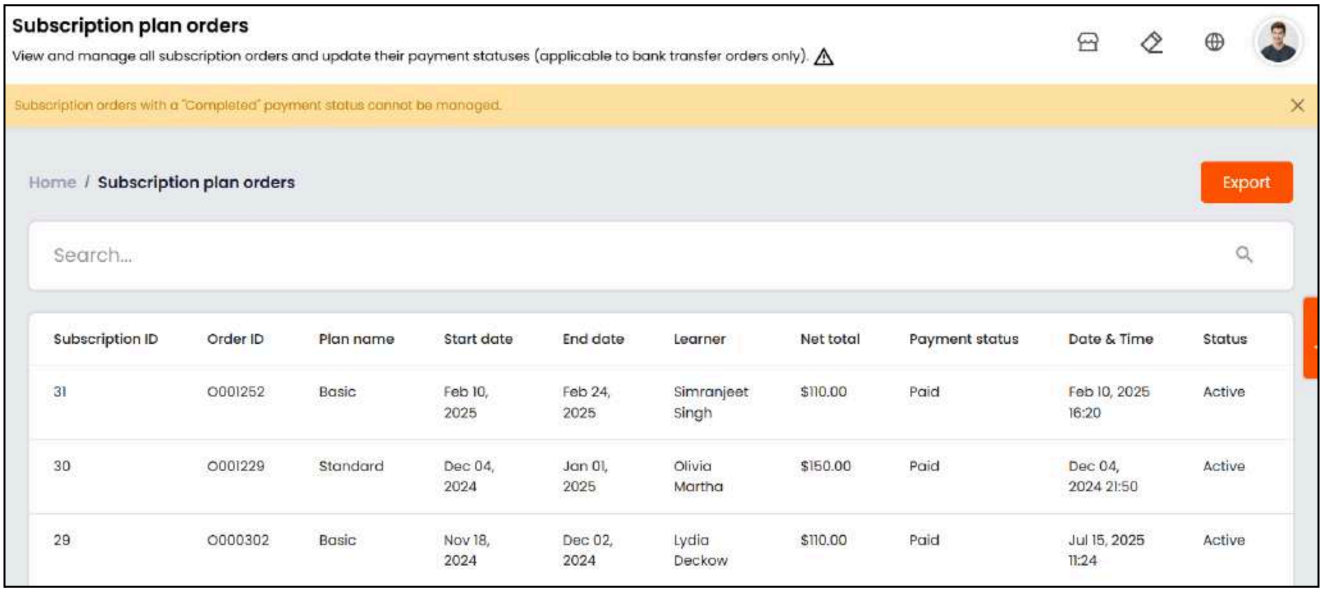
7.4 Subscription plan orders

*This module is visible (and this order type is applicable) only if the subscription feature is activated on the platform under **Settings > System configurations >** [System](#).*

Each subscription plan order placed on the platform is listed under this submodule. You can view the order details and download the invoice as needed.

Kindly note that this submodule is limited to tracking orders, viewing their details, and downloading invoices.

You can take actions like canceling the order or adding the transaction details, against unpaid subscription plan orders and bank transfer subscription plan orders under the [All orders](#) submodule.



The list will be empty if you recently purchased the platform and chose not to include dummy content provided by FATbit during installation, or if no orders have been placed yet.

A subscription plan order is created when a learner purchases a subscription plan on the platform. These plans are designed to allow learners to purchase a set number of lessons over a specified period, making them an ideal option for school learners.

*Define all the subscription plans on the platform under **Settings >** [Learner subscription plans](#).*

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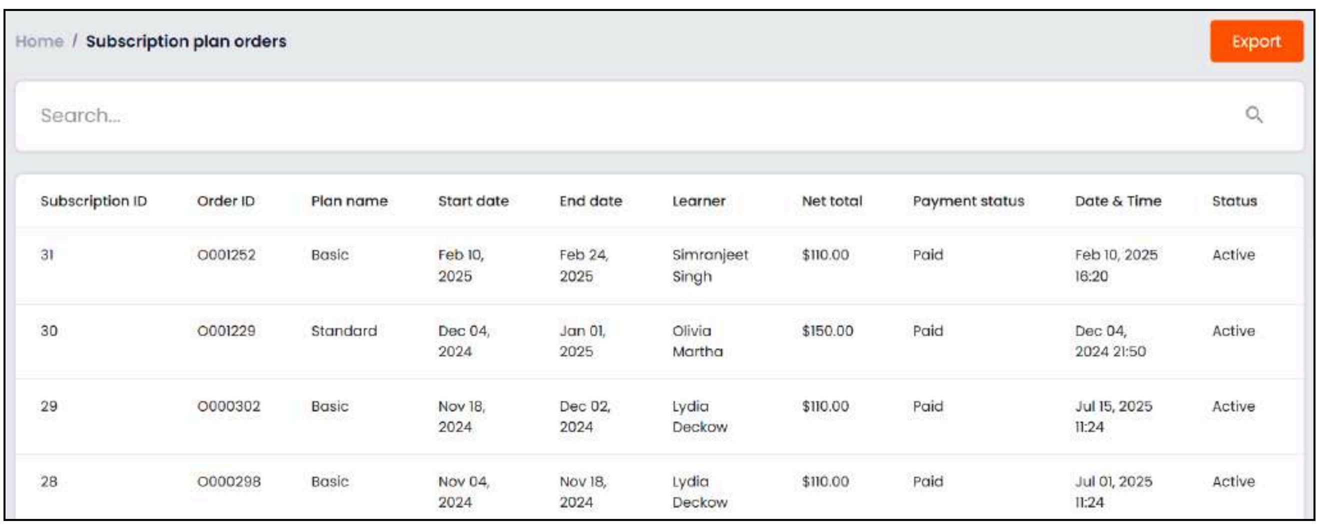
After purchasing a subscription plan, learners can book lessons based on the number of lessons included in the plan. For example, if a learner buys a subscription plan with 5 lessons, they can use those lessons for any combination of subjects and teachers. The learner has the flexibility to book all 5 lessons for the same subject and teacher, or spread them across different subjects and teachers.

Each time a lesson is booked for a subject offered by a teacher, a lesson order is created. A separate lesson order will be generated for each type of lesson booked, whether it's the same subject with a different teacher, a different subject with the same teacher, or different subjects with different teachers.

For example, if a learner books 3 Maths lessons with Teacher A and 2 Science lessons with Teacher B using all the 5 lessons from the subscription plan, two lesson orders will be created and listed on the Lesson orders page, each reflecting the number of lessons booked for the respective subject.

Refer to What is a lesson & how is a lesson booked to learn more about this type of order and how it differs from other lesson orders.

Manage the subscription plan orders list



The list displays the following details for each subscription plan order:

- **Subscription ID:** A unique identifier assigned to every subscription plan purchased.
- **Order ID:** A unique identifier assigned to every order.

- **Plan name:** The name of the plan that was purchased in the order.
- **Start date:** The date when the subscription plan starts, marking the beginning of the order period.
- **End date:** The date when the subscription plan ends.
- **Learner:** The name of the learner who placed the order.
- **Net total:** The total amount paid for the subscription plan order after deducting any applied discounts and used reward points from the total order amount (if applicable).
- **Payment status:** This defines the payment status of the order, which can be either paid or unpaid.
- **Date & Time:** The date and time when the order was placed.
- **Status:** This defines whether the subscription plan status is:
    - **Pending:** This status appears when the payment has not been processed for the order ID, and the subscription plan has not started.
    - **Active:** The subscription plan is active for the order ID.
    - **Completed:** The subscription plan has ended for the order ID.
    - **Canceled:** The subscription plan was canceled.

Action buttons

Under the **Action** column, each entry includes two action buttons, allowing you to perform specific actions.

The functions of each button are explained in detail below:

i. View

Click the button next to a subscription plan order to view its details.

A drawer will appear, showing the subscription plan order details.

Subscription plan order details

Learner name:	Simranjeet Singh
Status:	Active
Start date:	Feb 10, 2025 16:20
End date:	Feb 24, 2025 16:20
Plan name:	Basic
Plan validity(in weeks):	2
Lesson duration(in mins):	15
Lesson count:	10
Plan price:	$110.00
Discount:	$0.00
Reward discount:	$0.00
Net amount:	$110.00
Refund amount:	$0.00
Order date:	Feb 10, 2025 16:20
Order ID:	View O001252

The drawer displays the following information:

- **Learner name:** The name of the learner who placed the order.
- **Status:** The current status of the subscription plan, which can be pending (the subscription plan has not started as payment is pending), active, completed, or canceled.
- **Start date:** The start date and time of the subscription plan, for the respective order ID.
- **End date:** The end date and time of the subscription plan, for the respective order ID.

- **Plan name:** The name of the subscription plan purchased.
- **Plan validity (in weeks):** The validity of the subscription plan purchased.
- **Lesson duration (in mins):** The duration of the lesson offered under the subscription plan.
- **Lesson count:** The number of lessons offered under the purchased subscription plan.
- **Plan price:** The price of the subscription plan as set by you under **Settings** > [Learner subscription plans].
- **Discount:** The amount of discount applied on the order amount, if any.
- **Reward discount:** The reward discount applied on the order amount, if any.
- **Net amount:** The total amount paid by the learner for the subscription plan order, after applying all discounts.
- **Refund:** The amount refunded for the subscription plan, if applicable. Refunds are issued under specific conditions:
    - If the subscription plan is canceled before any lessons are completed, the learner receives a full refund.
    - If the subscription plan is canceled after some lessons have been completed, a partial refund is provided. Only the unused (scheduled or unscheduled) lessons are refunded; completed sessions are excluded.
    - If the learner uses the [Report an issue] option, the refund is handled as per the regular lesson refund process.
    - If an individual lesson within the subscription is canceled (rather than canceling the full subscription), the lesson is credited back to the learner's plan and can be rescheduled later. No monetary refund is issued in this case.
    - If no refund is applicable for the plan, the field displays NA.
- **Order date:** The date and time the subscription plan order was placed.
- **Order ID:** The main order ID of the subscription plan order created.

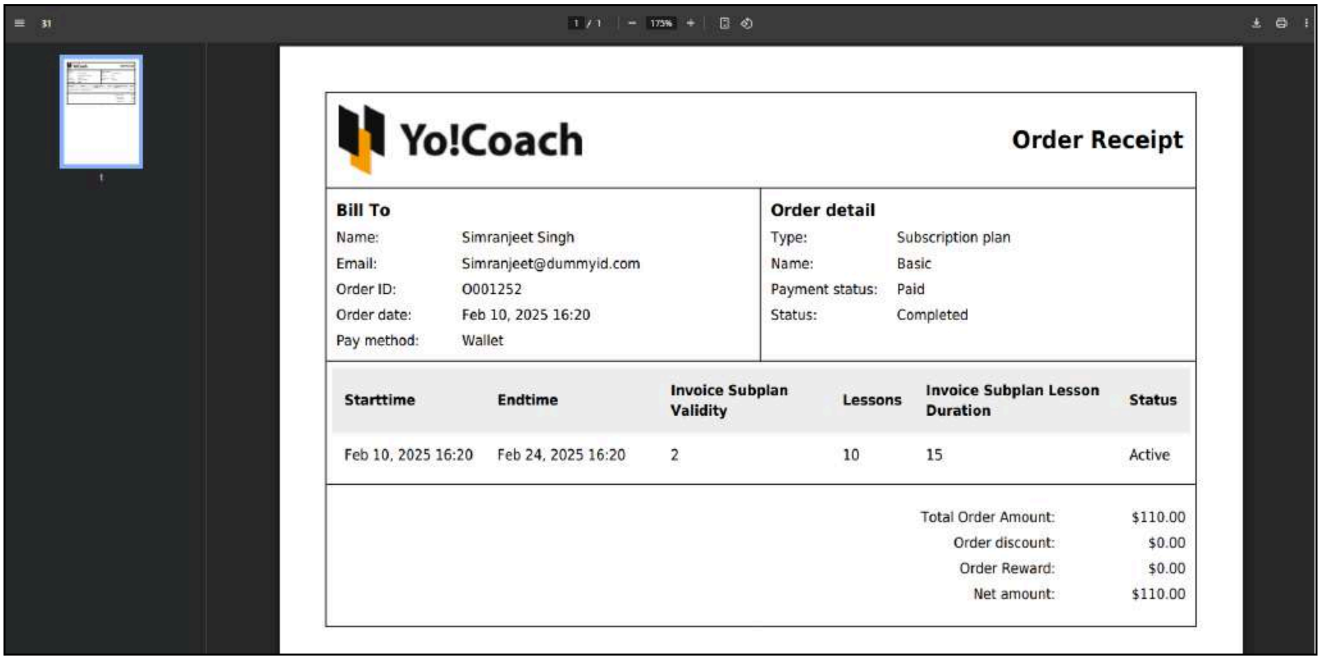
  This is a clickable link (**View {order ID}**) that redirects to the respective [Order details] page, which can also be accessed via the [All orders] page. Refer to this submodule for details on available actions and displayed information.

Review the details, then click ✕ in the upper-right corner of the drawer to close it.

ii. Download invoice

Click this to **view** and **download** the order invoice.

The invoice will open in PDF format in a new tab.



Yo!Coach

Order Receipt

Bill To

Name:	Simranjeet Singh
Email:	Simranjeet@dummyid.com
Order ID:	O001252
Order date:	Feb 10, 2025 16:20
Pay method:	Wallet

Order detail

Type:	Subscription plan
Name:	Basic
Payment status:	Paid
Status:	Completed

Starttime	Endtime	Invoice Subplan Validity	Lessons	Invoice Subplan Lesson Duration	Status
Feb 10, 2025 16:20	Feb 24, 2025 16:20	2	10	15	Active

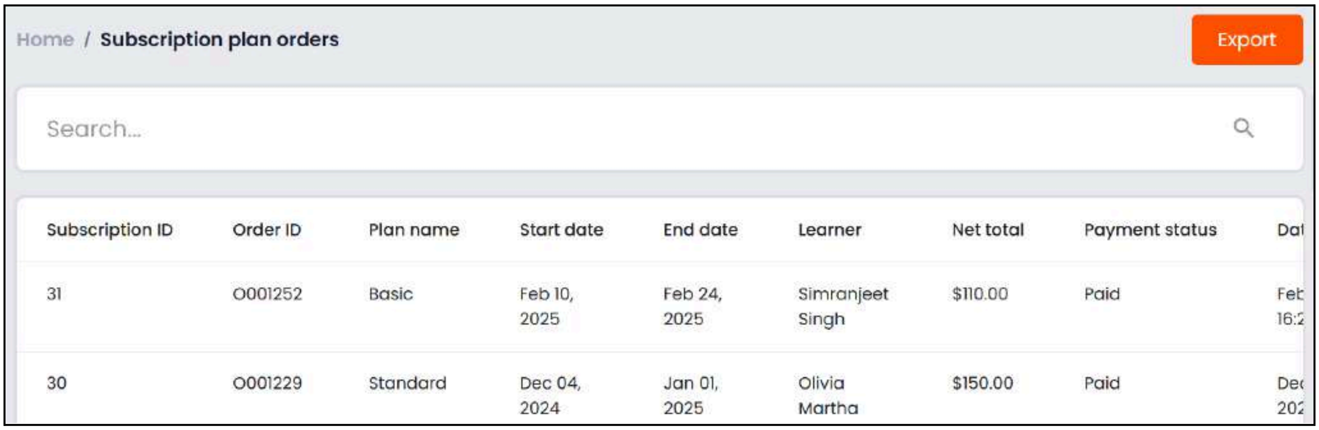
Total Order Amount:	$110.00
Order discount:	$0.00
Order Reward:	$0.00
Net amount:	$110.00

Review the invoice and click the **Download** button in the upper-right corner to save the PDF to your system.

Search for a subscription plan order

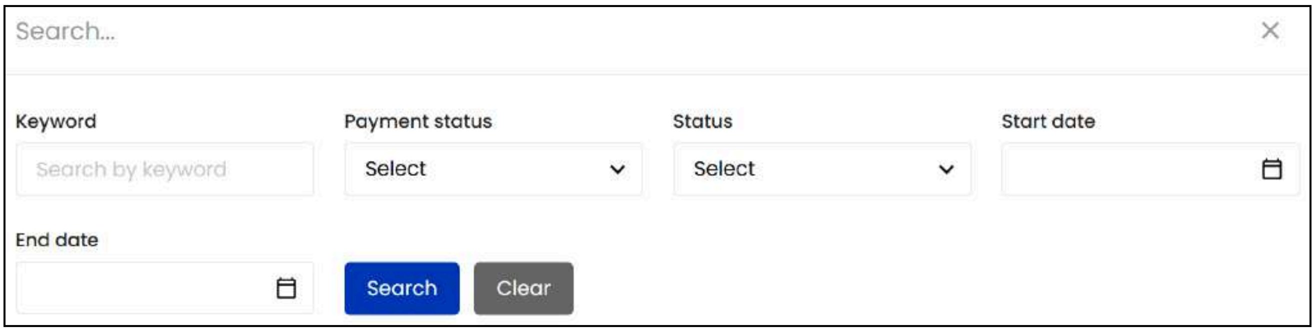
Use the search functionality at the top of the list to find a specific subscription plan order.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.



Subscription ID	Order ID	Plan name	Start date	End date	Learner	Net total	Payment status	Dat
31	O001252	Basic	Feb 10, 2025	Feb 24, 2025	Simranjeet Singh	$110.00	Paid	Feb 16:2
30	O001229	Standard	Dec 04, 2024	Jan 01, 2025	Olivia Martha	$150.00	Paid	Dec 202

Click the search bar or 🔍 to expand it. Click ✕ or the search bar again to collapse the section.



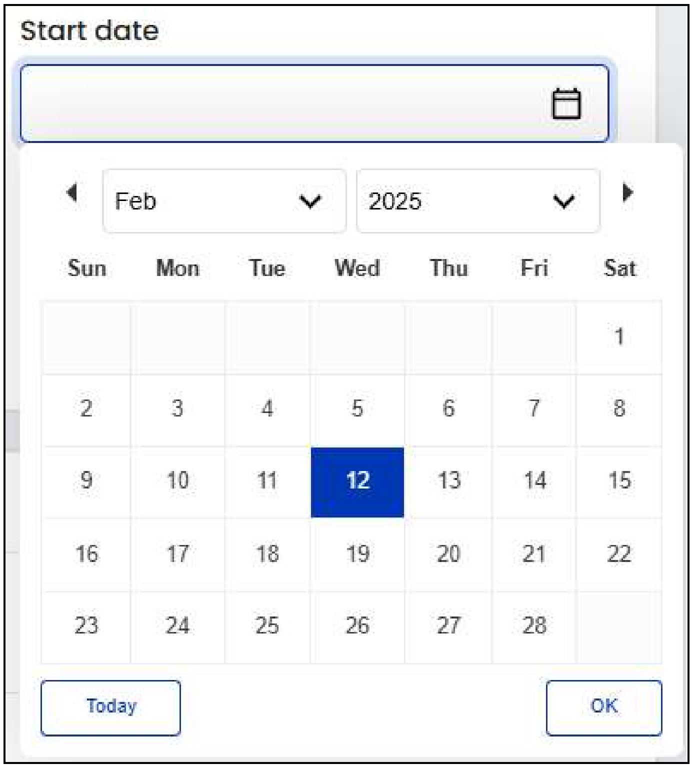
There are several filters that help narrow down the search. Each field is explained below:

- **Keyword:** Enter the subscription ID or order ID you are searching for in this field. You can also use this field to search for the order using the learner name or the plan name.
- **Payment status:** Click the field and select the payment status from the available options:
    - Unpaid
    - Paid
- **Status:** Click the field and select the subscription plan status from the available options:
    - Active
    - Pending
    - Completed
    - Canceled

- **Start date:** To view the subscription plan orders that start on a specific date, select the desired date in this field.

  To filter the subscription plan orders using their start and end date, select the start date by clicking the field.

  A calendar will appear; choose the date, and it will be added to the field.



  Use the **Today** button to select today's date and **Ok** to close the calendar.

- **End date:** Select the end date in this field.

  *The **Start date** value must always be an earlier date, and the **End date** value must be later than the date selected in the **Start date** field.*

  *For example, if the **Start date** is 09/24/2020, the **End date** must be a date after this, such as 09/25/2020 or any future date. If incorrect dates are entered, no results will be displayed in the list.*

Search for a subscription plan order by filling in a single field or multiple fields. To view the subscription plan orders using their start date and end date, use the respective date fields.

After filling in the desired fields, click **Search** to display the results. Click **Clear** to reset all fields and start a new search.

Export subscription plan orders data

To export the subscription plan orders data from this page, click **Export** from the upper-right corner.

The data will be downloaded as a `.csv` file (Comma-Separated Values), which can be used for backups or external purposes.

A success message will appear once the download is complete.

To export specific subscription plan orders data, use the [search bar] to apply the necessary filters and define the criteria.

After setting the filters and clicking **Search** to view the results, click **Export** to download the filtered data as a `.csv` file.

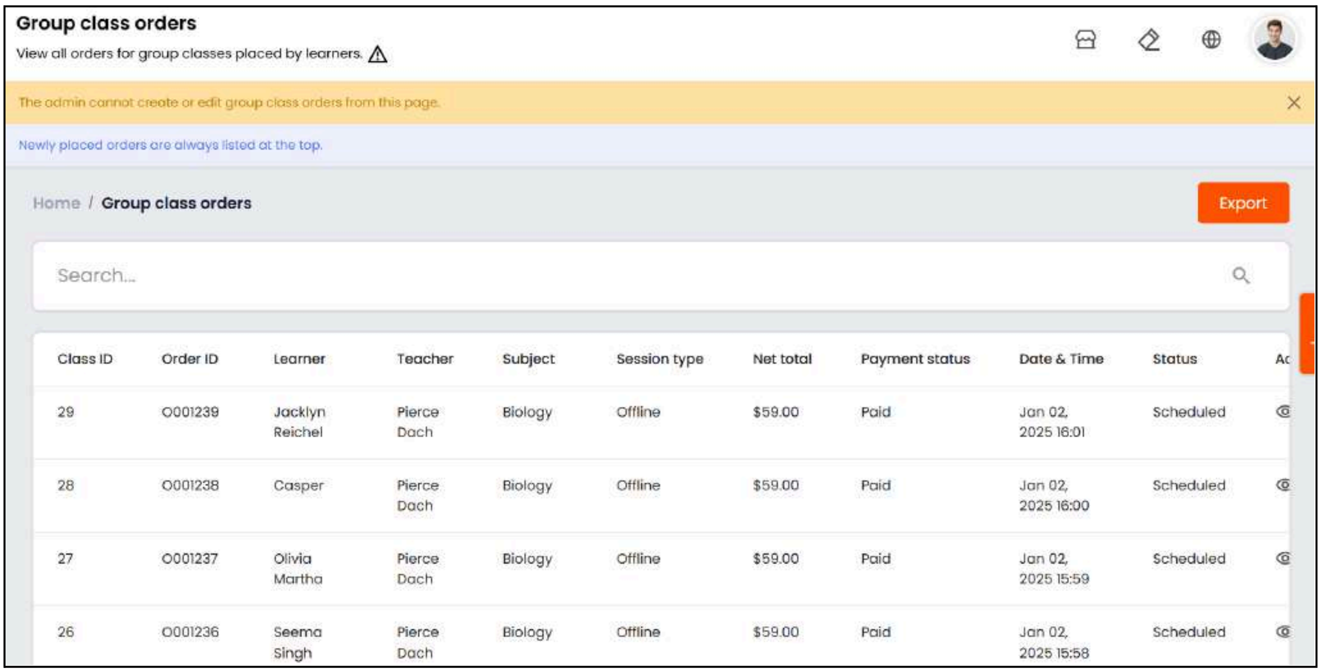
<u>**DISCLAIMER:**</u> The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

7.5 Group class orders

Each group class purchased on the platform generates an order, which is listed under this submodule. You can view the order details and download the invoice as needed.

Kindly note that this submodule is limited to tracking orders, viewing their details, and downloading invoices.

You can take actions like canceling the order or adding the transaction details, against unpaid group class orders and bank transfer group class orders under the [All orders](#) submodule.

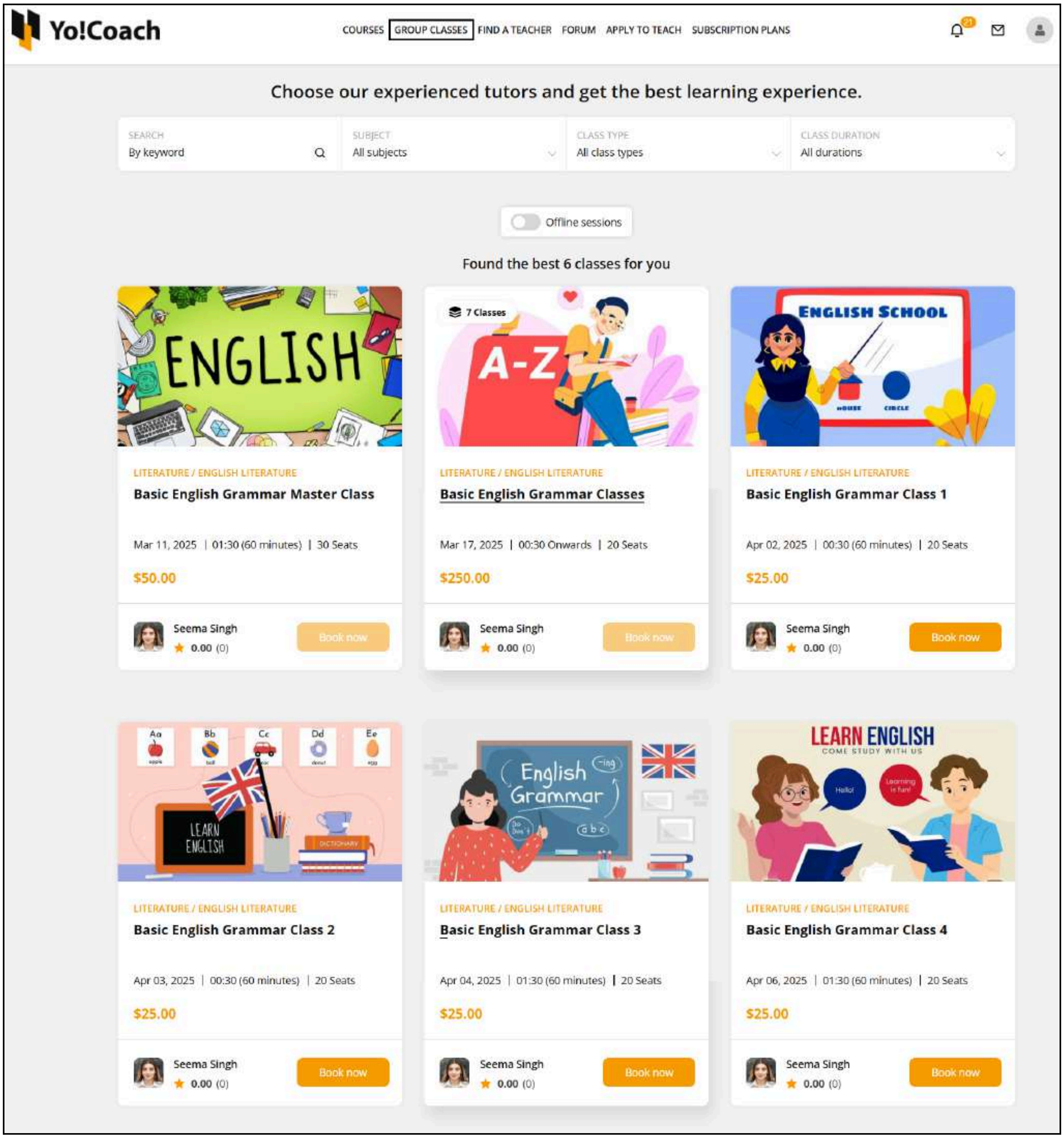


The list will be empty if you recently purchased the platform and chose not to include dummy content provided by FATbit during installation, or if no orders have been placed yet.

Refer to the [Group classes](#) submodule to learn more about group classes and how they differ from lessons.

How to book a group class (or a package)?

Learners can book a group class (or a package) by navigating to the **Group classes** page on the front end.



They can use filters such as subject, class type (regular or package), and class duration to refine their search.

Once a suitable class is found, learners can click **Book now** to proceed to the checkout page and complete the payment.

Types of group class orders

Learners can place one of two types of orders for group classes:

1. Regular group class order

A regular group class order allows learners to purchase a single group class session offered by a teacher on a specific date and time.

2. Package order

A package is a collection of group classes created by the teacher.

This option is used when a teacher offers multiple classes for a subject and wants to provide a comprehensive learning experience.

The package includes all classes scheduled on specific dates and times. Learners can purchase the entire package to attend all the included classes.

Group class orders page

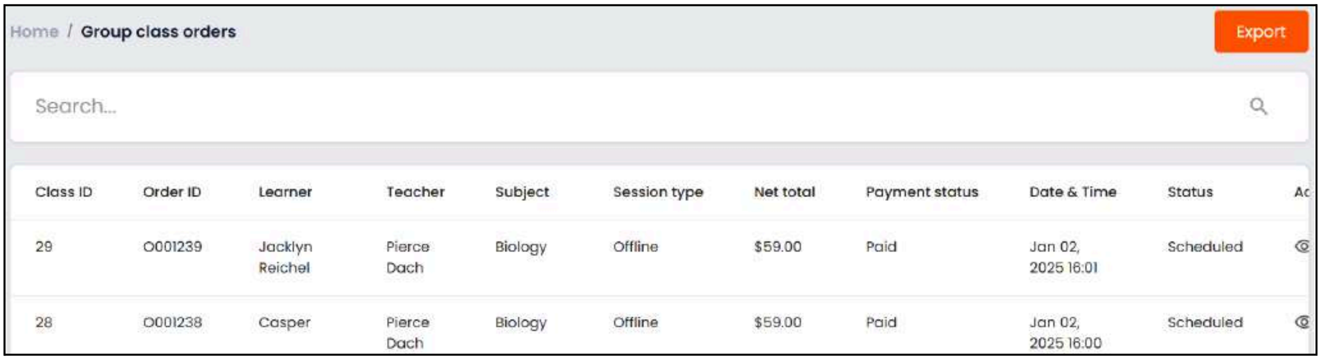
This submodule displays all group class orders.

Although the Package orders submodule is separate, each class within a package is also listed as an individual group class order.

For example, if a learner purchases a package worth $250 that includes 5 classes, each of the 5 classes will appear as a separate group class order on the Group class orders page.

The package order itself will be displayed on the Package orders page.

Manage the group class orders list



The list displays the following details for each group class order:

- **Class ID:** A unique identifier assigned to every group class purchased.
- **Order ID:** A unique identifier assigned to every order.
- **Learner:** The name of the learner who placed the order.
- **Teacher:** The name of the teacher who is offering the group class session.
- **Subject:** The subject being taught in the group class.
- **Session type:** The session type associated with the order, which can be either online or offline.
- **Net total:** The total amount paid for the order, calculated by subtracting any discounts applied from the total order amount.
- **Payment status:** This defines the payment status of the order, which can be either paid or unpaid.
- **Date & Time:** The date and time when the order was placed.
- **Status:** This defines whether the group class status is scheduled, completed or canceled.

Action buttons

Under the **Action** column, each entry includes two action buttons, allowing you to perform specific actions.

The functions of each button are explained in detail below:

i. View

Click the button next to a group class order to view its details. A drawer will appear, showing the group class order details.

Group class order details

Learner name:	Jacklyn Reichel
Teacher name:	Pierce Dach
Class name:	Molecular Biology: From Nucleotide To Nucleic Acid
Subject:	Science » Biology
Session type:	Offline
Class status:	Scheduled
Order payment status:	Paid
Start time:	Jan 06, 2025 19:15
End time:	Jan 06, 2025 19:45
Teacher start time:	NA
Teacher end time:	NA
Learner start time:	NA
Learner end time:	NA
Class price:	$59.00
Discount:	$0.00
Reward discount:	$0.00
Net amount:	$59.00
Admin commission:	$0.00
Affiliate commission:	$0.00

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

The drawer displays the following information:

- **Learner name:** The name of the learner who placed the order.
- **Teacher name:** The name of the teacher providing (or who has provided) the group class session.
- **Class name:** The name of the group class session.
- **Subject:** The subject being taught in the session.
- **Session type:** The type of session booked by the learner, either online or offline.
- **Class status:** The current status of the class, which can be completed, canceled, or scheduled.
- **Order payment status:** The payment status for the group class order, which can be paid or unpaid. An unpaid order eventually gets canceled.
- **Start time:** The start date and time of the group class, for the respective order ID.
- **End time:** The end date and time of the group class, for the respective order ID.
- **Teacher start time:** The date and time the teacher enters the session to begin teaching. If the session has not been conducted yet (when the class status is scheduled, or canceled), the value will be NA.
- **Teacher end time:** The date and time the teacher completes the group class. If the session has not been conducted yet (when the class status is scheduled, or canceled), the value will be NA.
- **Learner start time:** The date and time the learner enters the session to attend the group class. If the session has not been conducted yet (when the class status is scheduled, or canceled), the value will be NA.
- **Learner end time:** The date and time the learner completes the group class. If the session has not been conducted yet (when the class status is scheduled, or canceled), the value will be NA.
- **Class price:** The price of the group class as set by the teacher.
- **Discount:** The amount of discount applied on the class price, if any.
- **Reward discount:** The reward discount applied on the class price, if any.

- **Net amount:** The total amount paid by the learner for the group class, after applying all discounts.

- **Admin commission:** The amount deducted from the net amount as the admin commission, if applicable.

- **Affiliate commission:** The affiliate commission amount deducted from your (admin) account, if applicable. This amount is calculated using the affiliate commission percentage defined by you and the class price.

Teacher paid:	No
Class reviewed:	No
Issue reported:	No
Refund:	NA
Order ID:	View O001239
Ended by:	NA

- **Teacher paid:** This defines whether the teacher has been paid for the group class conducted.

  "**Yes**" means the teacher has been paid. "**No**" means they have not been paid yet. For group classes not conducted (that have the status as scheduled) or canceled, the value will always be "**No**."

- **Class reviewed:** This defines whether the learner has reviewed the group class or not.

  "**Yes**" means the learner has given their review. "**No**" means they have not given a review yet. For group classes not conducted (that have the status as scheduled) or canceled, the value will always be "**No**."

- **Issue reported:** This defines if the learner reported an issue with the group class to the admin or not.

  "**Yes**" means the learner reported an issue. "**No**" means no issue was reported. For group classes not conducted (that have the status as scheduled) or canceled, the value will always be "**No**."

- **Refund:** The amount refunded for the group class, if applicable.

Refunds are possible only if the group class was canceled or if the learner reported the group class and a refund was approved. For cases where no refund is given, the value will be NA.

- **Order ID:** The main order ID of the group class order created.

  This is a clickable link (**View {order ID}**) that redirects to the respective Order details page, which can also be accessed via the All orders page. Refer to this submodule for details on available actions and displayed information.

- **Ended by:** The name of the teacher or learner who ended the group class. If the group class has not been conducted yet, the value will be NA.

Review the details, then click ✕ in the upper-right corner of the drawer to close it.

ii. Download invoice

Click this to **view** and **download** the order invoice.

The invoice will open in PDF format in a new tab.


Yo!Coach

Order Receipt

Bill To

Name: Jacklyn Reichel
Email: Jacklyn.reichel@dummyid.com
Order ID: O001239
Order date: Jan 02, 2025 16:01
Pay method: Wallet

Order detail

Type: Group classes
Name: Molecular Biology: From Nucleotide To Nucleic Acid
Teacher: Pierce Dach
Session type: Offline
Subjects: Biology
Duration: 30 Minutes
Payment status: Paid
Status: Completed

Class ID	Class start time	Class end time	Status
29	Jan 06, 2025 19:15	Jan 06, 2025 19:45	Scheduled

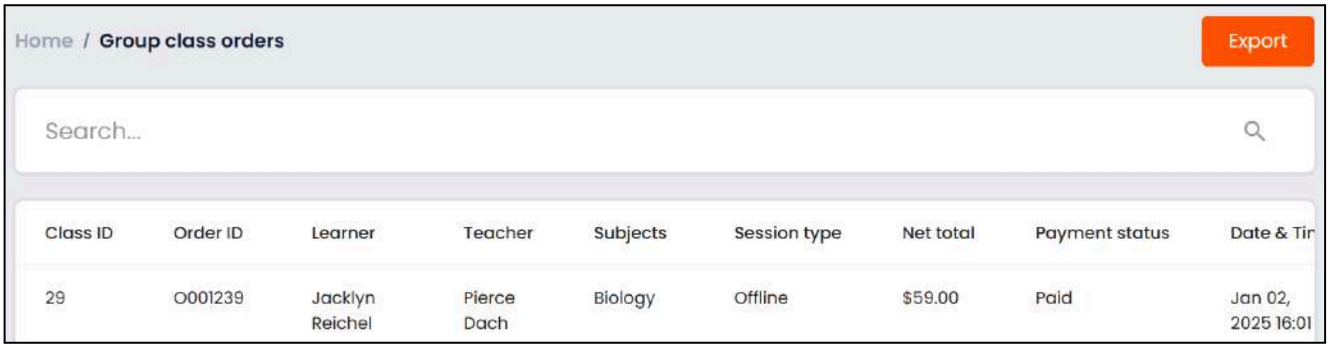
Total Order Amount: $59.00
Order discount: $0.00
Order Reward: $0.00
Net amount: $59.00

Review the invoice and click the **Download** button in the upper-right corner to save the PDF to your system.

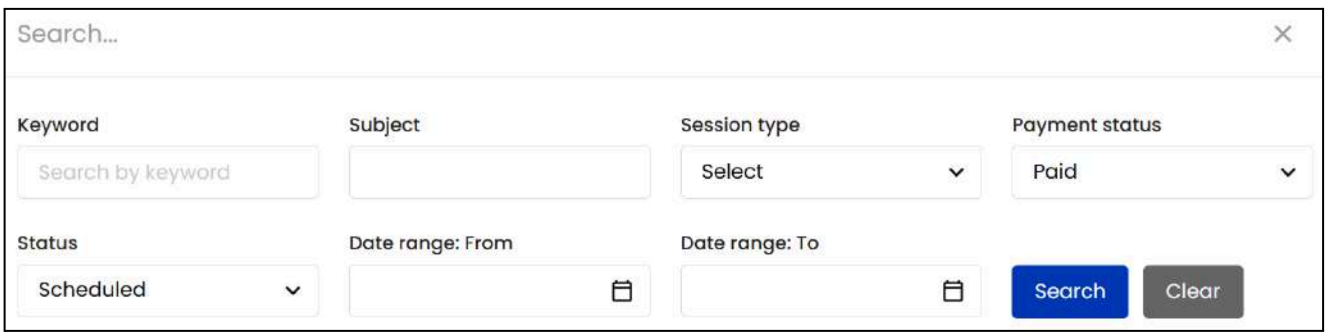
DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

Search for a group class order

Use the search functionality at the top of the list to find a specific group class order.



Click the search bar or to expand it. Click or the search bar again to collapse the section.



There are several filters that help narrow down the search. Each field is explained below:

- **Keyword:** Enter the class ID or order ID you are searching for in this field. You can also use this field to search for the order using the teacher name or learner name.
- **Subject:** Enter the subject of the group class you are searching for.

  Place the cursor in the field and start typing. As you type, a list of matching results will appear.

__DISCLAIMER:__ The color theme and labels may differ in the screenshots compared to those on the platform.
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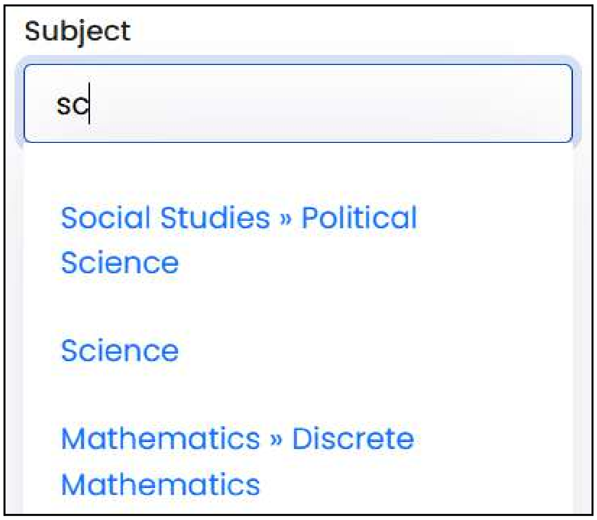
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

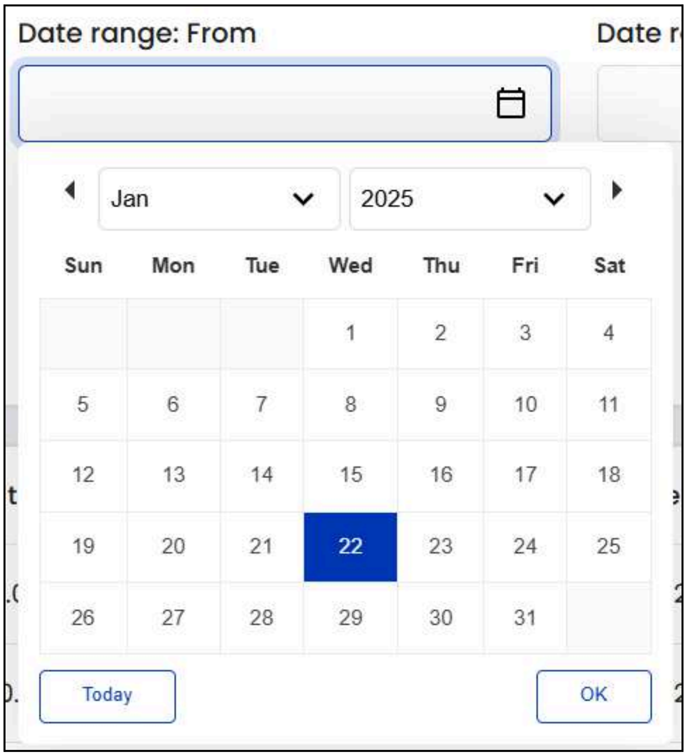


Select the applicable option.

- **Session type:** Click the field and select the session type from the available options:
    - Online
    - Offline
- **Payment status:** Click the field and select the payment status from the available options:
    - Unpaid
    - Paid
- **Status:** Click the field and select the group class status from the available options:
    - Scheduled
    - Completed
    - Canceled
- **Date range: From:** To view group class orders placed on a specific date, select the desired date in this field.

  To filter the group class orders placed within a date range, select the start date by clicking the field.

  A calendar will appear; choose the date, and it will be added to the field.



Use the **Today** button to select today's date and **Ok** to close the calendar.

- **Date range: To:** Select the ending date of the range in this field.

*The **Date range: From** value must always be an earlier date, and the **Date range: To** value must be later than the date selected in the **Date range: From** field.*

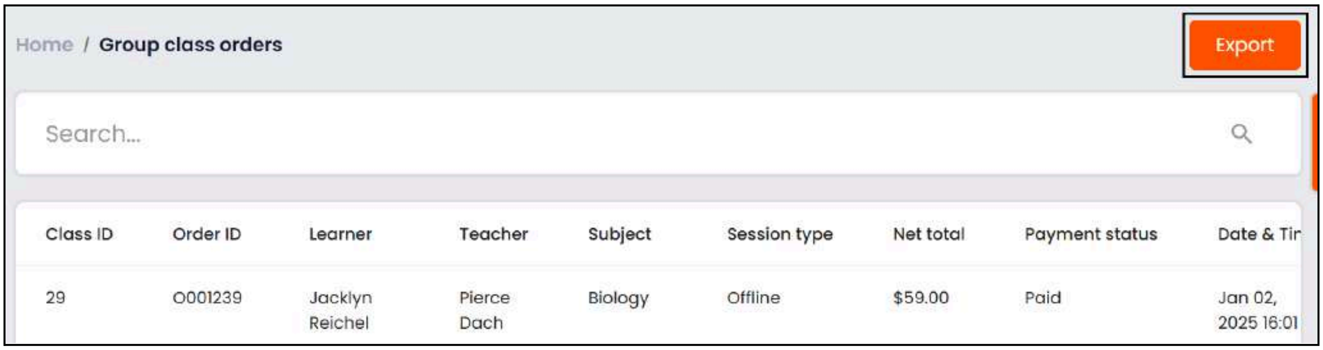
*For example, if the **Date range: From** is 09/24/2020, the **Date range: To** must be a date after this, such as 09/25/2020 or any future date. If incorrect dates are entered, no results will be displayed in the list.*

Search for a group class order by filling in a single field or multiple fields. To view group class orders placed within a specific date range, use the date fields.

After filling in the desired fields, click **Search** to display the results. Click **Clear** to reset all fields and start a new search.

Export group class orders data

To export the group class orders data from this page, click **Export** from the upper-right corner.



The data will be downloaded as a `.csv` file (Comma-Separated Values), which can be used for backups or external purposes.

A success message will appear once the download is complete.

To export specific group class orders data, use the search bar to apply the necessary filters and define the criteria.

After setting the filters and clicking **Search** to view the results, click **Export** to download the filtered data as a `.csv` file.

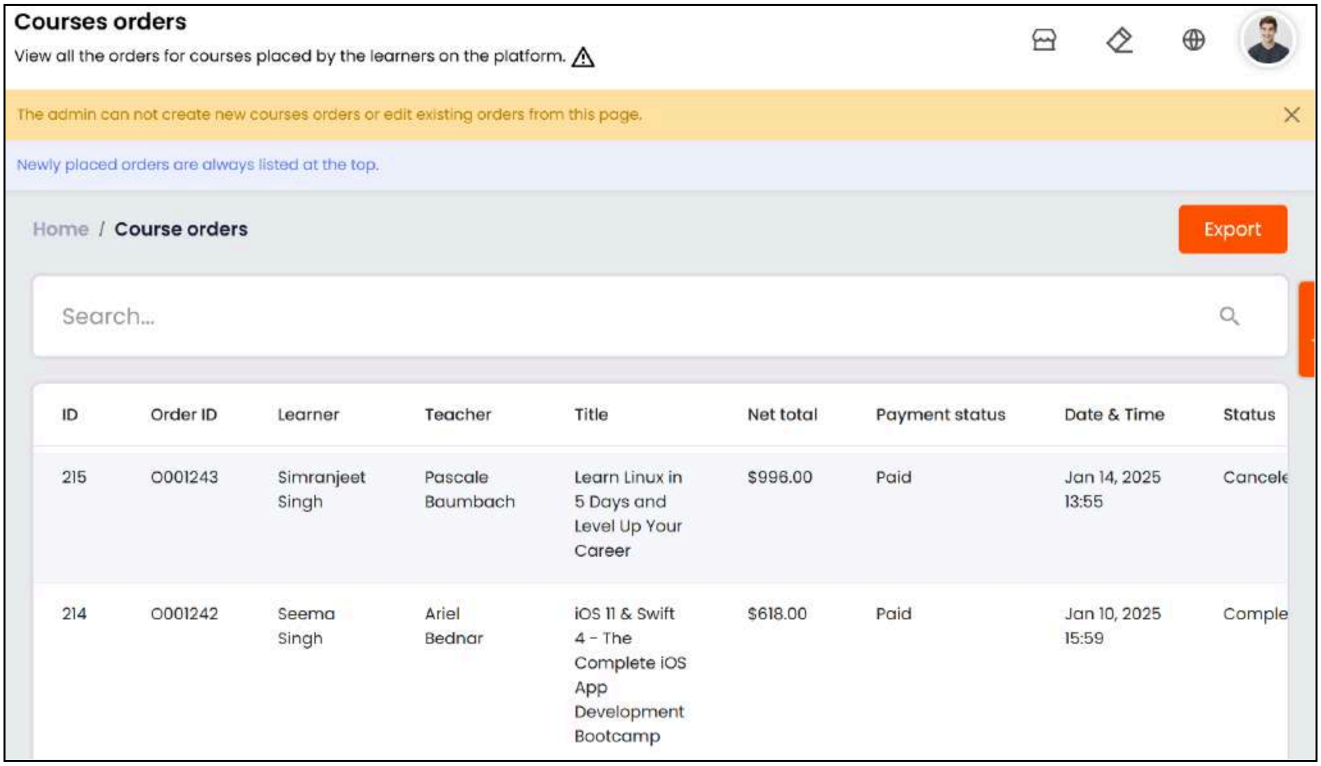
DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

7.6 Course orders

Each course purchased on the platform generates an order, which is listed under this submodule. You can view the order details and download the invoice as needed.

Kindly note that this submodule is limited to tracking orders, viewing their details, and downloading invoices.

You can take actions like canceling the order or adding the transaction details, against unpaid course orders and bank transfer course orders under the [All orders](#) submodule.

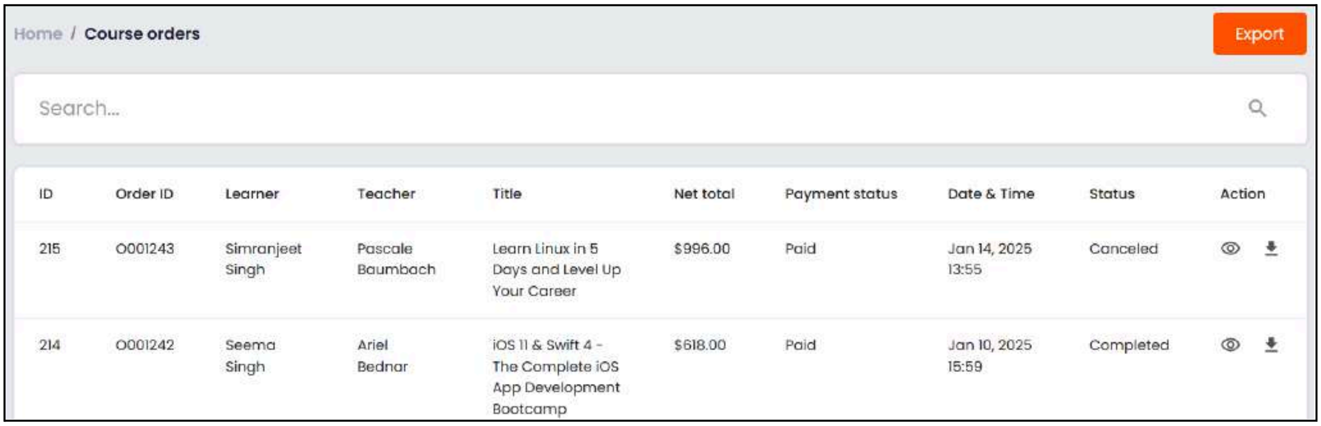


The list will be empty if you recently purchased the platform and chose not to include dummy content provided by FATbit during installation, or if no orders have been placed yet.

Refer to the [Courses](#) submodule to learn more about them.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

Manage the course orders list



The list displays the following details for each course order:

- **ID:** A unique identifier assigned to every course purchased.
- **Order ID:** A unique identifier assigned to every order.
- **Learner:** The name of the learner who placed the order.
- **Teacher:** The name of the teacher who is offering the course.
- **Title:** The title of the course.
- **Net total:** The total amount paid for the order, calculated by subtracting any discounts applied from the total order amount.
- **Payment status:** This defines the payment status of the order, which can be either paid or unpaid.
- **Date & Time:** The date and time when the order was placed.
- **Status:** This defines whether the course status is pending, in progress, completed or canceled.

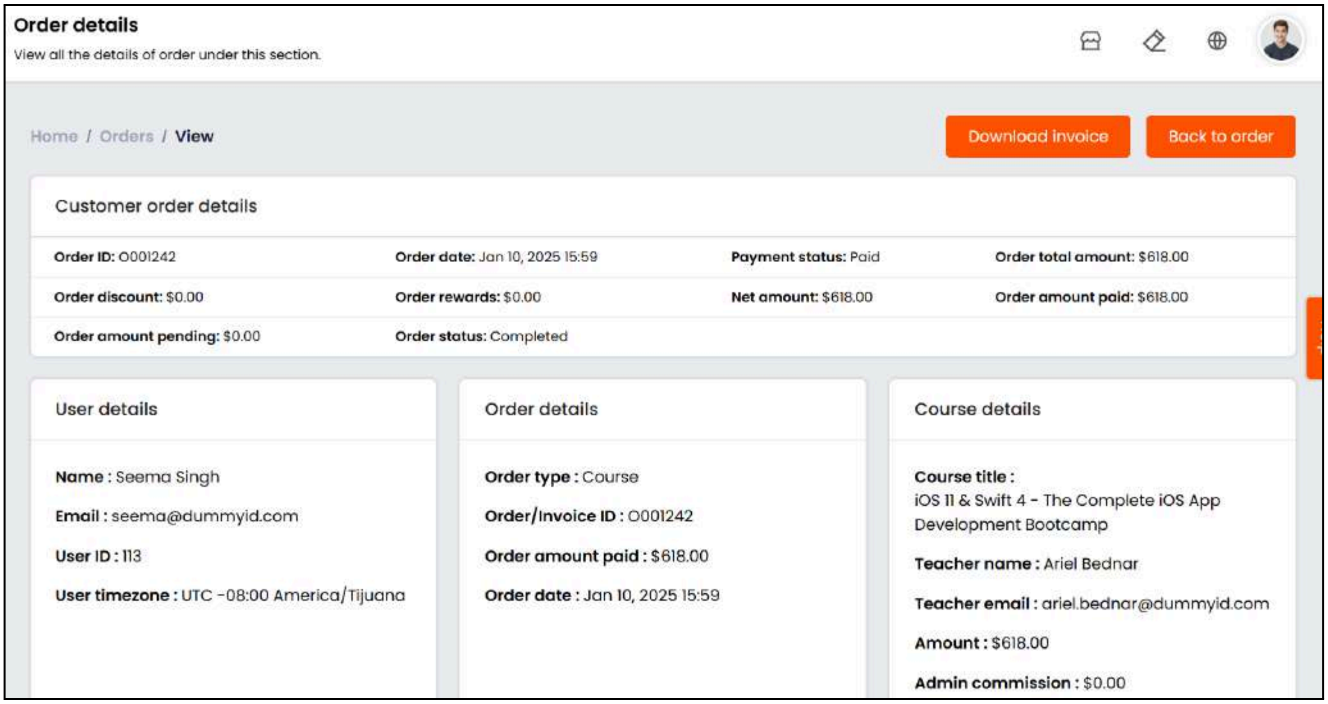
Action buttons

Under the **Action** column, each entry includes two action buttons, allowing you to perform specific actions.

The functions of each button are explained in detail below:

i. View

Click the button next to a course order to view its details. This will direct you to the Order details page.



This page can also be accessed from the All orders page and contains the same information. For more details, refer to the view action button section under the All orders submodule.

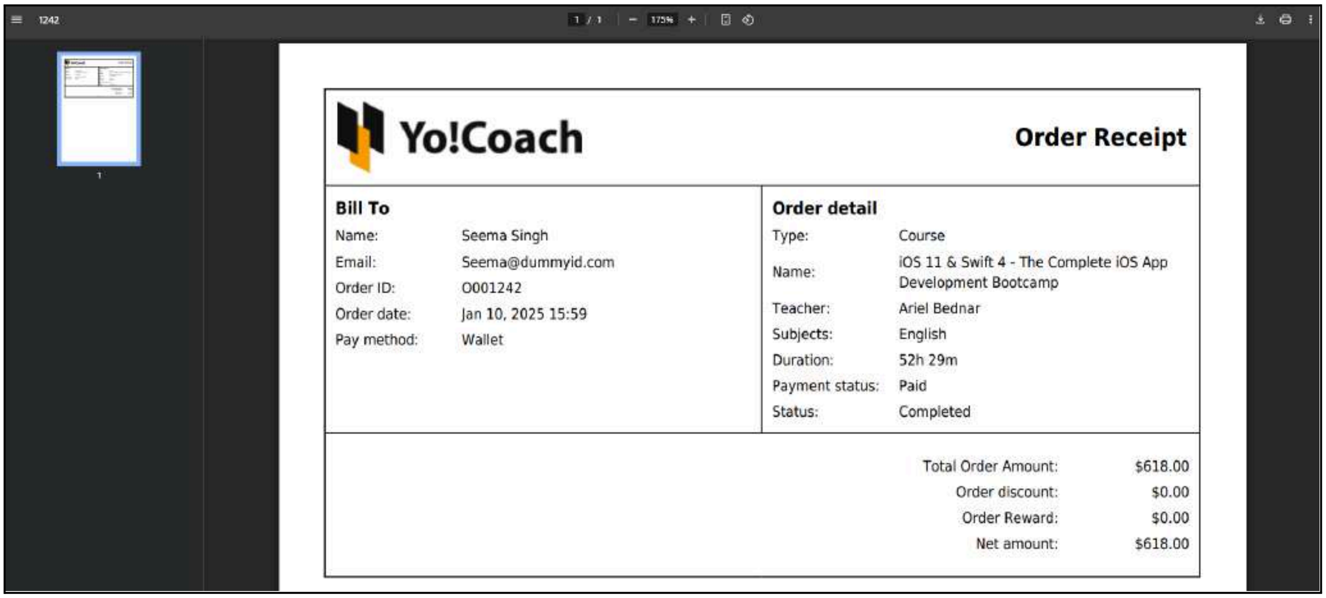
After reviewing the course order details, select Course orders from the navigation menu to return to the Course orders page.

ii. Download invoice

Click this to **view** and **download** the order invoice.

The invoice will open in PDF format in a new tab.

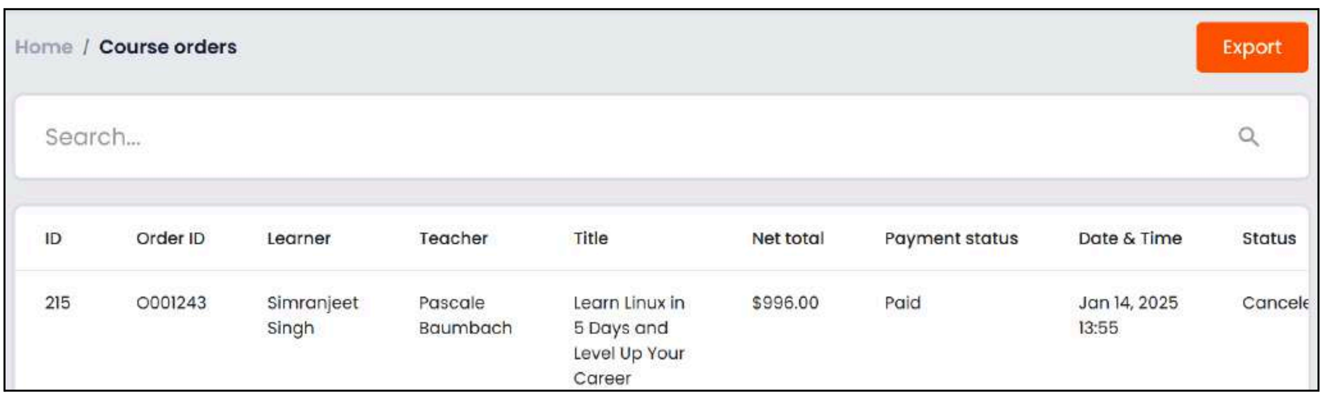
DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.



Review the invoice and click the **Download** button in the upper-right corner to save the PDF to your system.

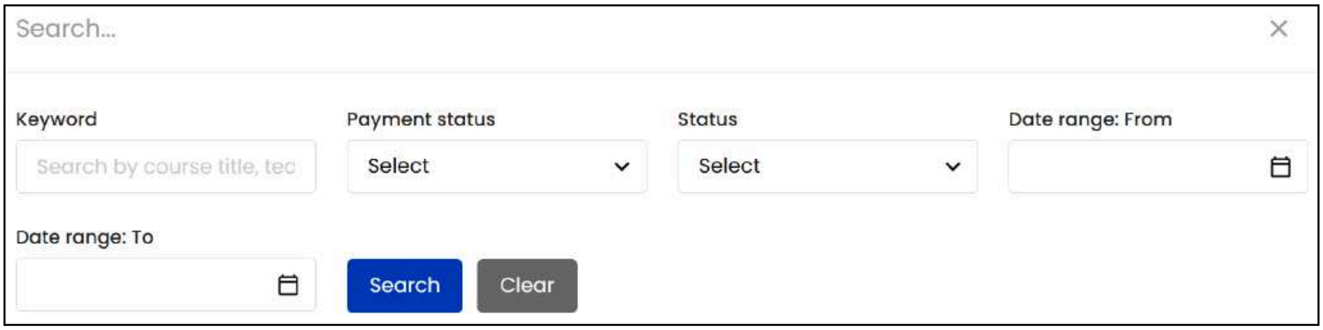
Search for a course order

Use the search functionality at the top of the list to find a specific course order.



Click the search bar or to expand it. Click or the search bar again to collapse the section.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

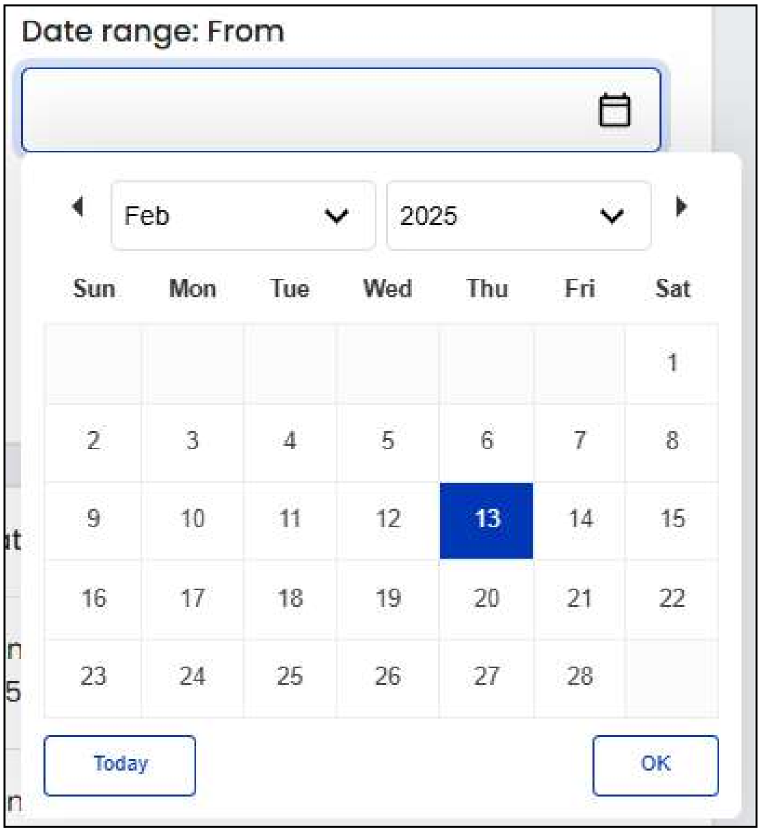


There are several filters that help narrow down the search. Each field is explained below:

- **Keyword:** Enter the class ID or order ID you are searching for in this field. You can also use this field to search for the order using the course title, teacher name or learner name.
- **Payment status:** Click the field and select the payment status from the available options:
    - Unpaid
    - Paid
- **Status:** Click the field and select the group class status from the available options:
    - Pending
    - In progress
    - Completed
    - Canceled
- **Date range: From:** To view course orders placed on a specific date, select the desired date in this field.

  To filter the course orders placed within a date range, select the start date by clicking the field.

  A calendar will appear; choose the date, and it will be added to the field.



Use the **Today** button to select today's date and **Ok** to close the calendar.

- **Date range: To:** Select the ending date of the range in this field.

*The **Date range: From** value must always be an earlier date, and the **Date range: To** value must be later than the date selected in the **Date range: From** field.*

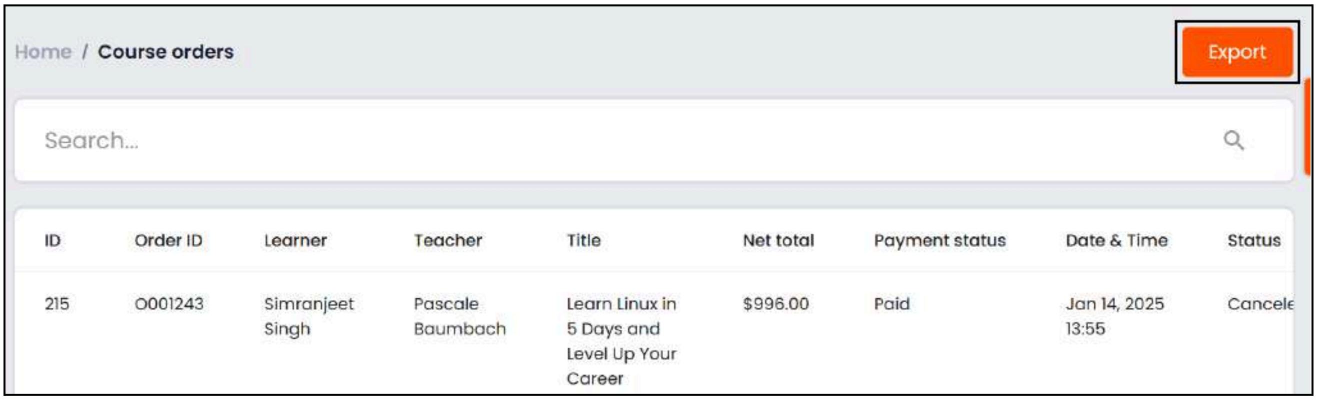
*For example, if the **Date range: From** is 09/24/2020, the **Date range: To** must be a date after this, such as 09/25/2020 or any future date. If incorrect dates are entered, no results will be displayed in the list.*

Search for a course order by filling in a single field or multiple fields. To view course orders placed within a specific date range, use the date fields.

After filling in the desired fields, click **Search** to display the results. Click **Clear** to reset all fields and start a new search.

Export course orders data

To export the course orders data from this page, click **Export** from the upper-right corner.



The data will be downloaded as a `.csv` file (Comma-Separated Values), which can be used for backups or external purposes.

A success message will appear once the download is complete.

To export specific course orders data, use the [search bar] to apply the necessary filters and define the criteria.

After setting the filters and clicking **Search** to view the results, click **Export** to download the filtered data as a `.csv` file.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
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The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

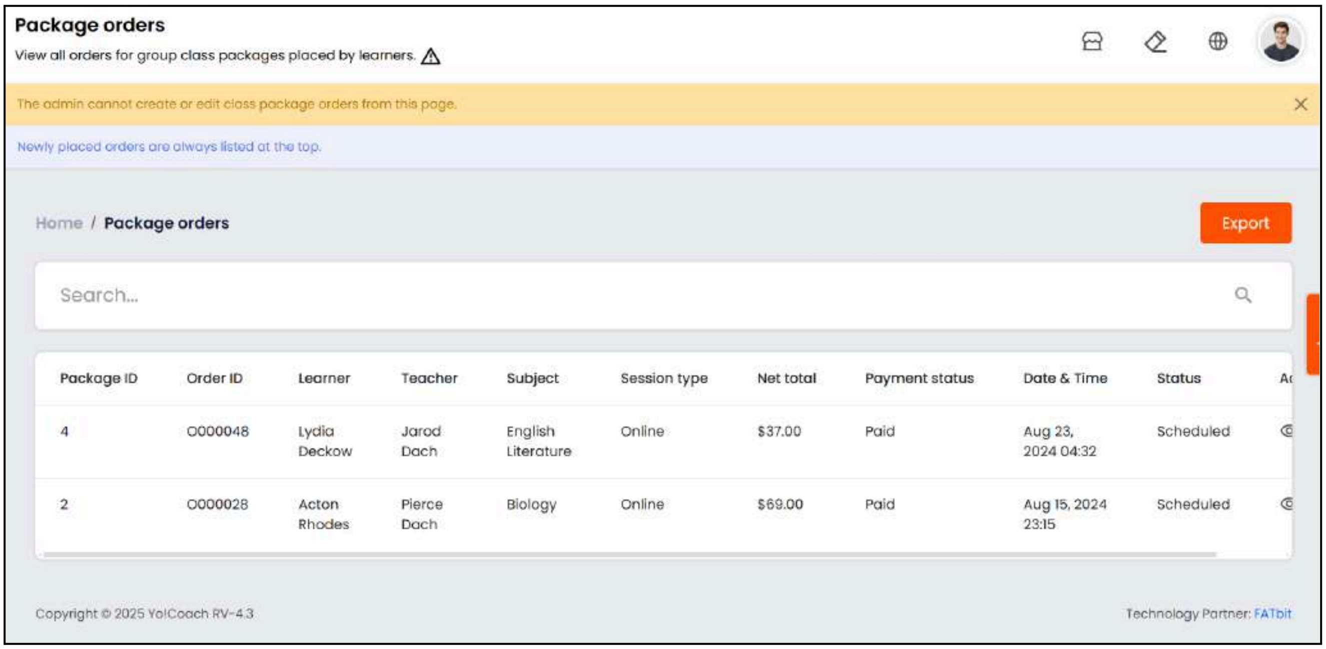
7.7 Package orders

Each package purchased on the platform generates an order, which is listed under this submodule.

You can view the order details and download the invoice as needed.

Kindly note that this submodule is limited to tracking orders, viewing their details, and downloading invoices.

You can take actions like canceling the order or adding the transaction details, against unpaid package orders and bank transfer package orders under the [All orders](#) submodule.



The list will be empty if you recently purchased the platform and chose not to include dummy content provided by FATbit during installation, or if no orders have been placed yet.

A package order allows learners to attend multiple group classes bundled together by the teacher.

When a package order is placed, a separate group class order is created for each class included in the package. These group class orders are listed on the Group class orders page.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
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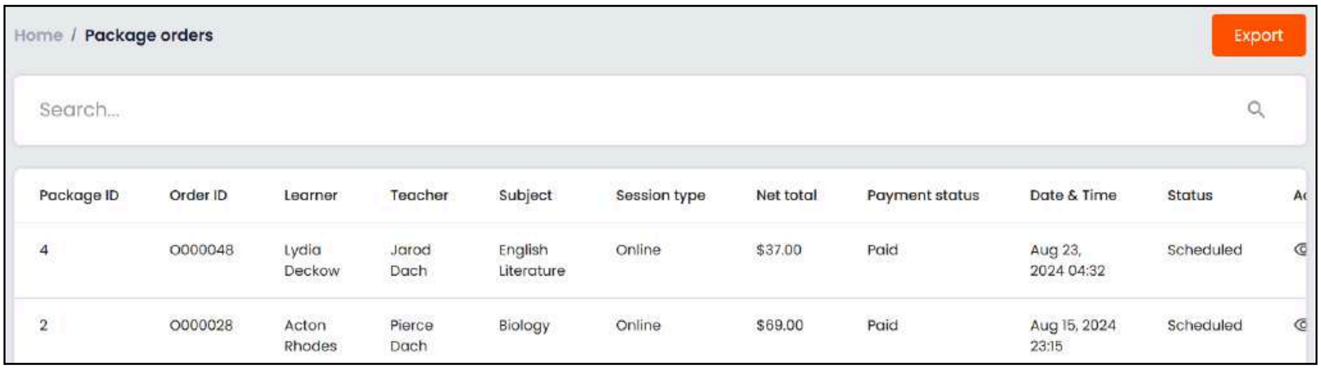
For example, if a learner purchases a package worth $250 that includes 5 classes, each class will appear as a separate group class order on the [Group class orders](#) page, while the package itself will be displayed on the [Package orders](#) page.

Refer to [How to book a group class (or a package)](#) to learn more about package orders and regular group class orders.

Manage the package orders list



Package ID	Order ID	Learner	Teacher	Subject	Session type	Net total	Payment status	Date & Time	Status	Ac
4	O000048	Lydia Deckow	Jarod Dach	English Literature	Online	$37.00	Paid	Aug 23, 2024 04:32	Scheduled	
2	O000028	Acton Rhodes	Pierce Dach	Biology	Online	$69.00	Paid	Aug 15, 2024 23:15	Scheduled	

The list displays the following details for each package order:

- **Package ID:** A unique identifier assigned to every package purchased.
- **Order ID:** A unique identifier assigned to every order.
- **Learner:** The name of the learner who placed the order.
- **Teacher:** The name of the teacher who is offering the package.
- **Subject:** The subject name that will be taught in the classes offered under the package.
- **Session type:** The session type associated with the order, which can be either online or offline.
- **Net total:** The total amount paid for the order, calculated by subtracting any discounts applied from the total order amount.
- **Payment status:** This defines the payment status of the order, which can be either paid or unpaid.
- **Date & Time:** The date and time when the order was placed.

- **Status:** This defines whether the package status is scheduled, completed or canceled.

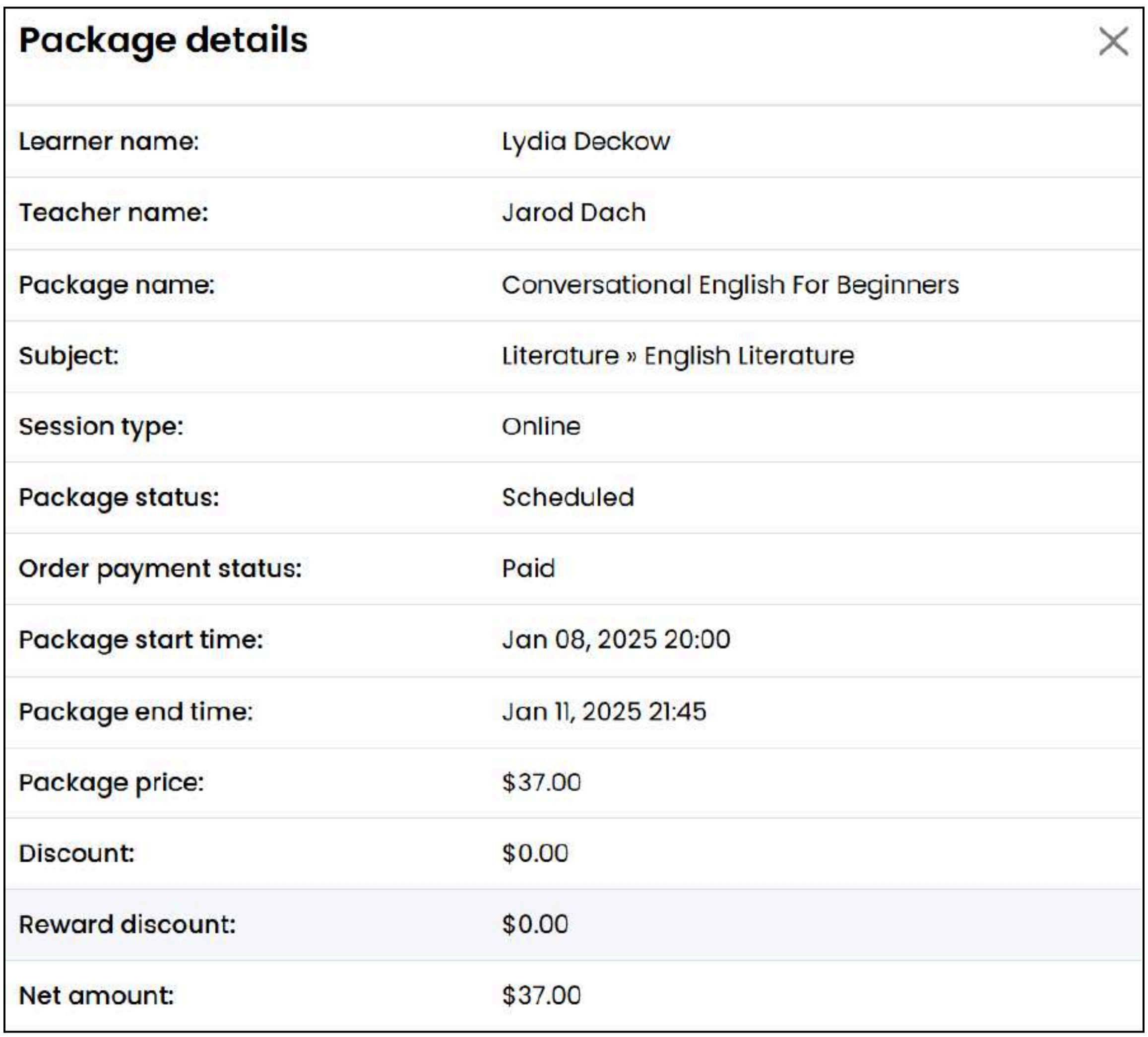
Action buttons

Under the **Action** column, each entry includes two action buttons, allowing you to perform specific actions.

The functions of each button are explained in detail below:

i. View

Click the button next to a package order to view its details. A drawer will appear, showing the package order details.



The drawer displays the following information:

- **Learner name:** The name of the learner who placed the order.
- **Teacher name:** The name of the teacher conducting (or who has conducted) the group classes offered under the package.
- **Package name:** The name of the package.
- **Subject:** The subject being taught in the sessions offered under the package.
- **Session type:** The type of session booked by the learner, either online or offline.
- **Package status:** The current status of the package, which can be completed, canceled, or scheduled.
- **Order payment status:** The payment status for the group class order, which can be paid or unpaid. An unpaid order eventually gets canceled.
- **Package start time:** The start date and time of the package, for the respective order ID.
- **Package end time:** The end date and time of the package, for the respective order ID.
- **Package price:** The price of the package as set by the teacher.
- **Discount:** The amount of discount applied on the package price, if any.
- **Reward discount:** The reward discount applied on the package price, if any.
- **Net amount:** The total amount paid by the learner for the package, after applying all discounts.

Order ID:	View O000048
View classes:	View classes

- **Order ID:** The main order ID of the package order created.

  This is a clickable link (**View {order ID}**) that redirects to the respective Order details page, which can also be accessed via the All orders page.

  Refer to this submodule for details on available actions and displayed information.

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- **Ended by:** The name of the teacher or learner who ended the group class.

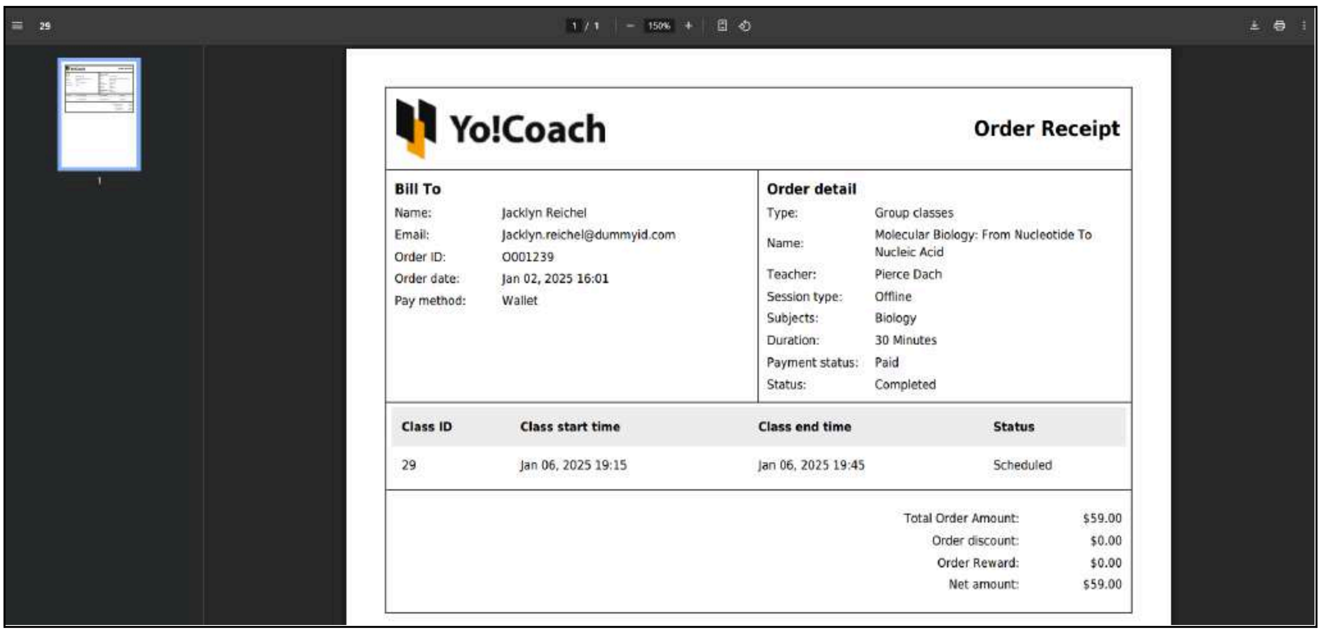
  If the group class has not been conducted yet, the value will be NA.

Review the details, then click ✕ in the upper-right corner of the drawer to close it.

ii. Download invoice

Click this to **view** and **download** the order invoice.

The invoice will open in PDF format in a new tab.



Review the invoice and click the **Download** button in the upper-right corner to save the PDF to your system.

Search for a package order

Use the search functionality at the top of the list to find a specific package order.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
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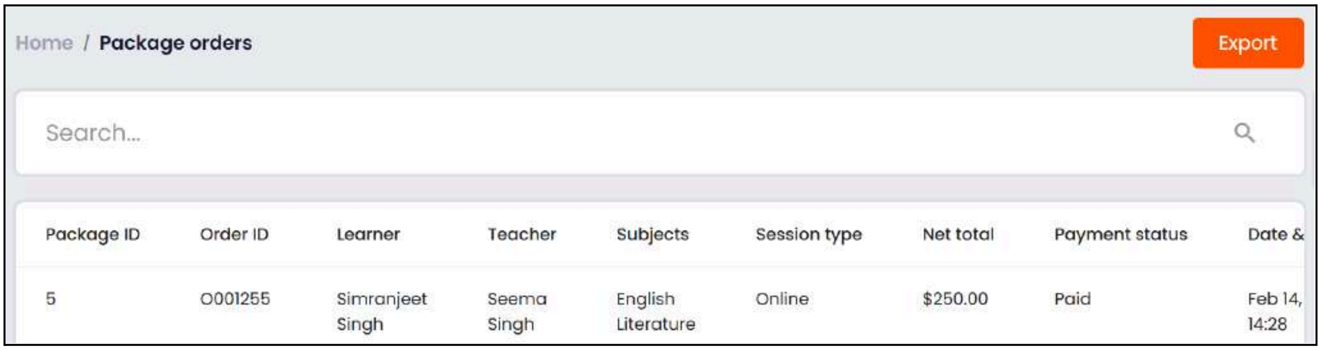
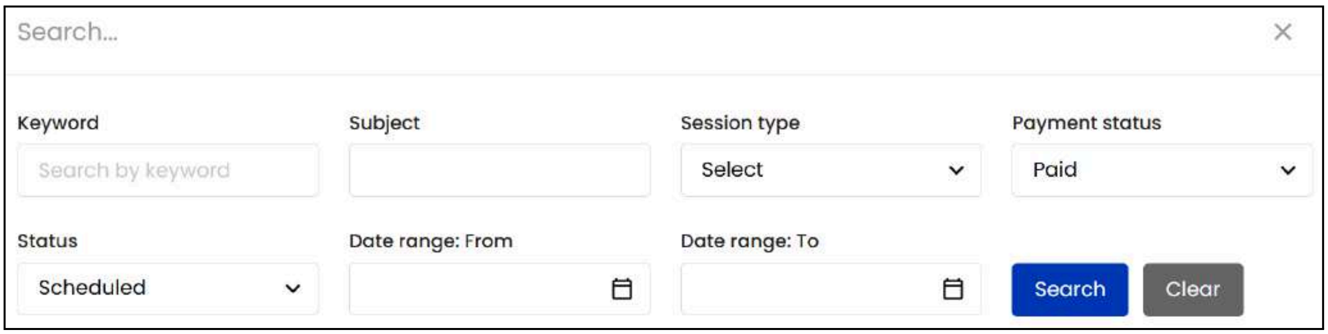


Click the search bar or to expand it. Click or the search bar again to collapse the section.



There are several filters that help narrow down the search. Each field is explained below:

- **Keyword:** Enter the package ID or order ID you are searching for in this field. You can also use this field to search for the order using the teacher name or learner name.
- **Subject:** Enter the subject of the package you are searching for.

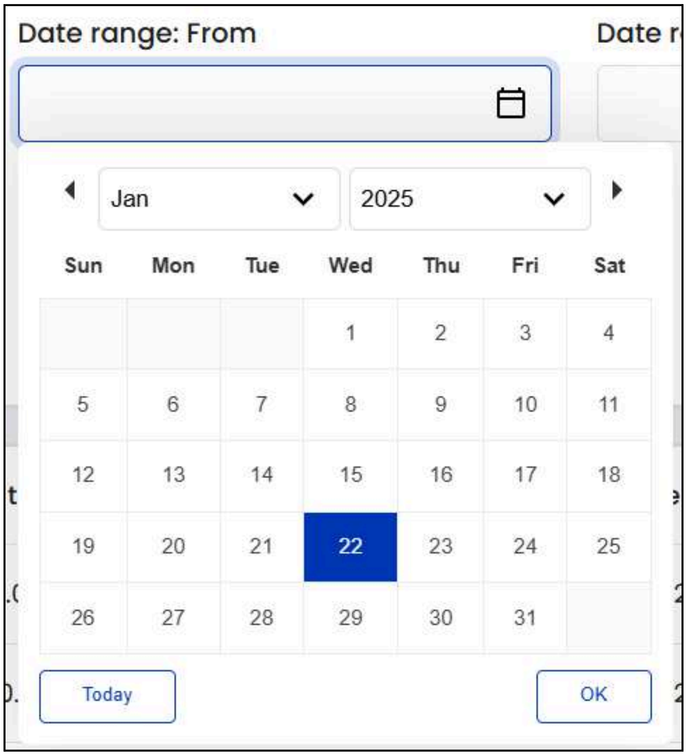
  Place the cursor in the field and start typing. As you type, a list of matching results will appear.

Select the applicable option.

- **Session type:** Click the field and select the session type from the available options:
    - Online
    - Offline
- **Payment status:** Click the field and select the payment status from the available options:
    - Unpaid
    - Paid
- **Status:** Click the field and select the package status from the available options:
    - Scheduled
    - Completed
    - Canceled
- **Date range: From:** To view package orders placed on a specific date, select the desired date in this field.

  To filter the package orders placed within a date range, select the start date by clicking the field.

  A calendar will appear; choose the date, and it will be added to the field.



DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

Use the **Today** button to select today's date and **Ok** to close the calendar.

- **Date range: To:** Select the ending date of the range in this field.

*The **Date range: From** value must always be an earlier date, and the **Date range: To** value must be later than the date selected in the **Date range: From** field.*

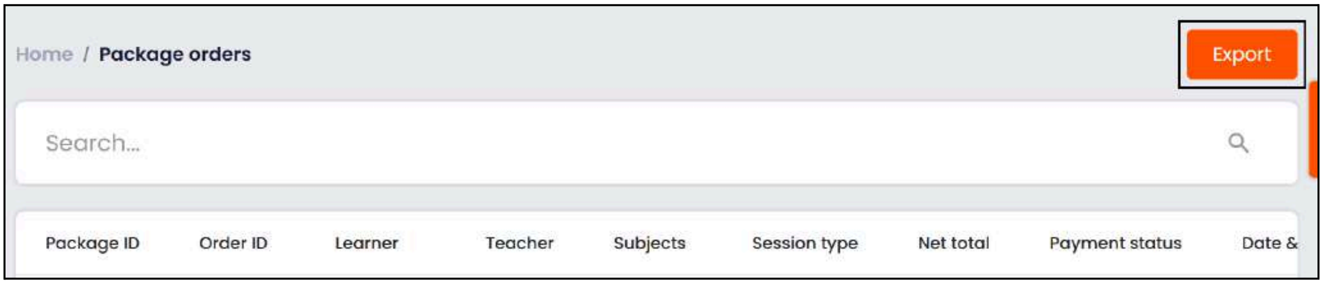
*For example, if the **Date range: From** is 09/24/2020, the **Date range: To** must be a date after this, such as 09/25/2020 or any future date. If incorrect dates are entered, no results will be displayed in the list.*

Search for a package order by filling in a single field or multiple fields. To view package orders placed within a specific date range, use the date fields.

After filling in the desired fields, click **Search** to display the results. Click **Clear** to reset all fields and start a new search.

Export package orders data

To export the package orders data from this page, click **Export** from the upper-right corner.



The data will be downloaded as a `.csv` file (Comma-Separated Values), which can be used for backups or external purposes.

A success message will appear once the download is complete.

To export specific package orders data, use the [search bar](#) to apply the necessary filters and define the criteria.

After setting the filters and clicking **Search** to view the results, click **Export** to download the filtered data as a `.csv` file.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
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7.8 Gift card orders

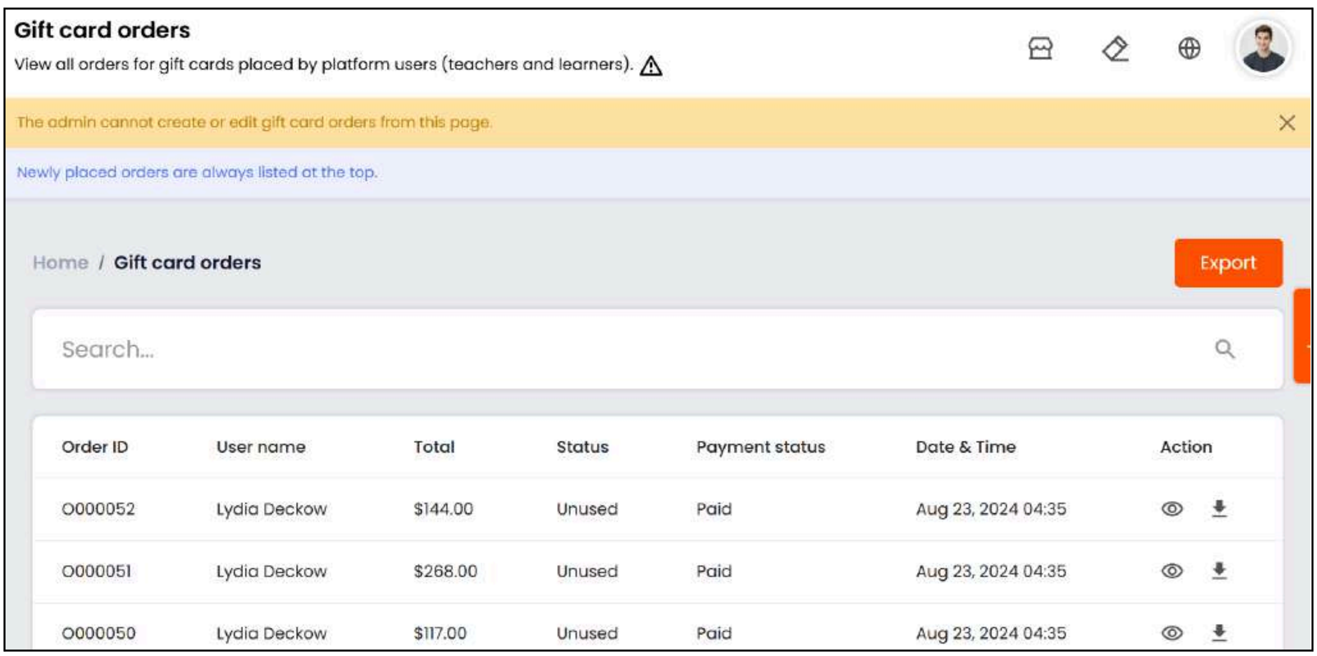
A gift card can be issued to any user—whether registered on the platform or not—except affiliate users. The recipient can use the gift card to place an order or add the gifted amount to their wallet.

When a gift card is purchased, a corresponding order is created and listed under this submodule.

You can view the order details and download the invoice as needed.

Kindly note that this submodule is limited to tracking orders, viewing their details, and downloading invoices.

You can take actions like canceling the order or adding the transaction details, against unpaid gift card orders and bank transfer gift card orders under the [All orders](#) submodule.



The list will be empty if you recently purchased the platform and chose not to include dummy content provided by FATbit during installation, or if no orders have been placed yet.

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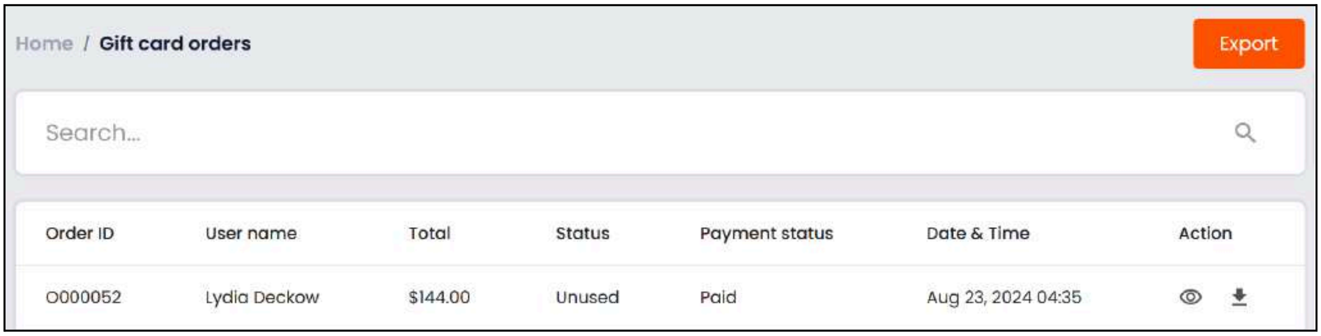
Manage the gift card orders list



The list displays the following details for each gift card order:

- **Order ID:** A unique identifier assigned to every order.
- **User name:** The name of the user who placed the order.
- **Total:** The total amount paid for the order.
- **Status:** This defines whether the gift card has been used or not. The status options include used, unused and canceled (applicable in cases where the learner's payment was not completed).
- **Payment status:** This defines the payment status of the order, which can be either paid or unpaid.
- **Date & Time:** The date and time when the order was placed.

Action buttons

Under the **Action** column, each entry includes two action buttons, allowing you to perform specific actions.

The functions of each button are explained in detail below:

i. View

Click the button next to a gift card order to view its details. A drawer will appear, showing the gift card order details.

Gift card order details

User name	Lydia Deckow
Payment status	Paid
Gift card code	64a6ae1d7eecc
Recipient name	Dorian Cabrera
Recipient email	nepuwog@dummyid.com
Gift card status	Unused
Amount	$144.00

The drawer displays the following information:

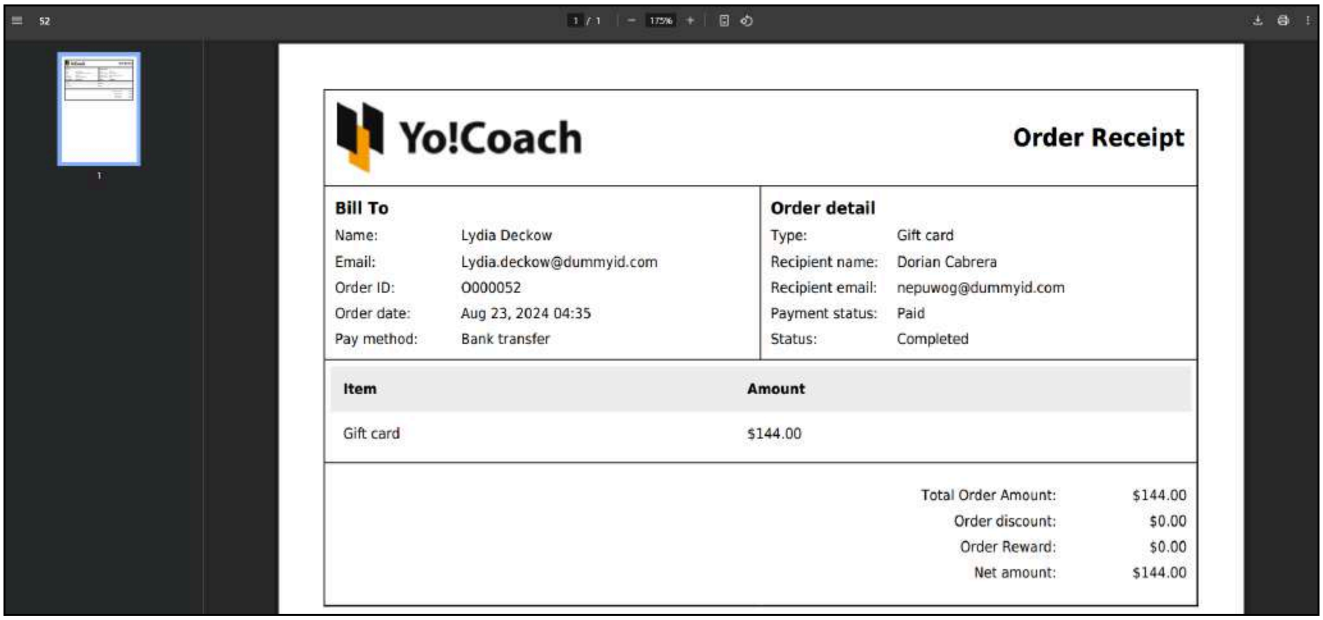
- **User name:** The name of the user who purchased the gift card.
- **Payment status:** The payment status for the gift card order, which can be paid or unpaid. An unpaid order eventually gets canceled.
- **Gift card code:** The unique code generated for the gift card order, which is or will be used by the recipient to redeem the gift card.
- **Recipient name:** The name of the user who received the gift card.
- **Recipient email:** The email address of the user who received the gift card.
- **Gift card status:** The gift card status indicates whether it is used, unused, or canceled. A gift card is marked as canceled if the payment is unpaid and the order is canceled.
- **Amount:** The value of the gift card.

Review the details, then click × in the upper-right corner of the drawer to close it.

ii. Download invoice

Click this to **view** and **download** the order invoice.

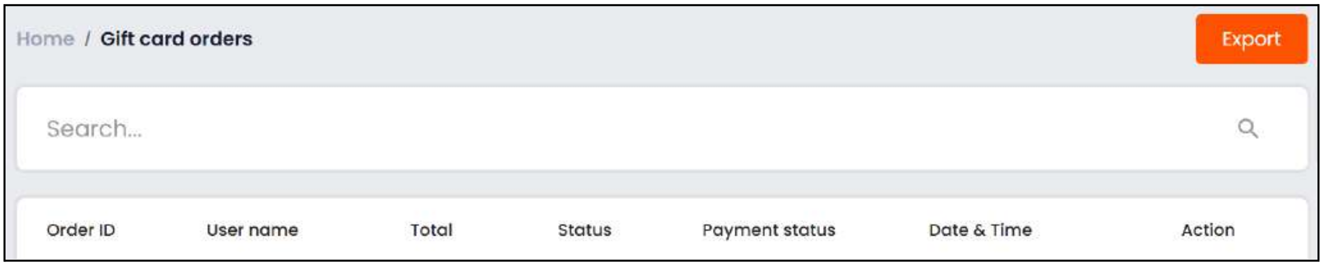
The invoice will open in PDF format in a new tab.



Review the invoice and click the **Download** button in the upper-right corner to save the PDF to your system.

Search for a gift card order

Use the search functionality at the top of the list to find a specific gift card order.



Click the search bar or to expand it. Click or the search bar again to collapse the section.

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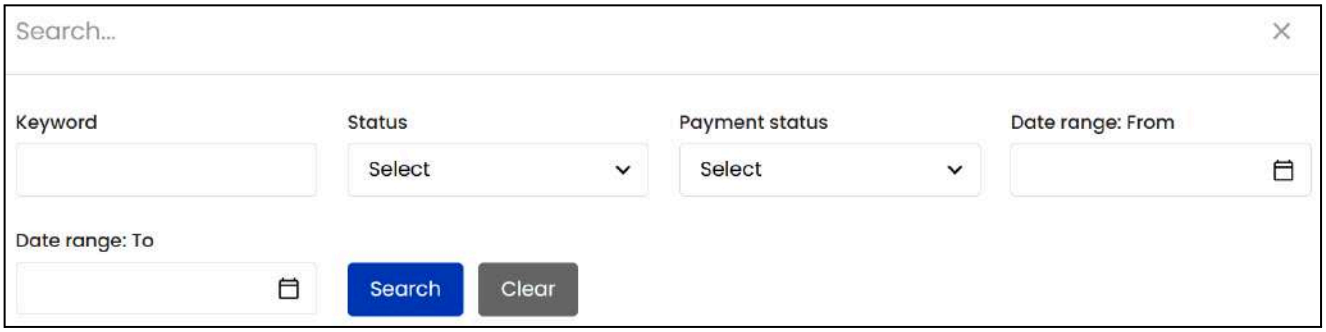

There are several filters that help narrow down the search. Each field is explained below:

- **Keyword:** Enter the order ID you are searching for in this field. You can also use this field to search for the user who made the purchase.
- **Status:** Click the field and select the gift card status from the available options:
  - Used
  - Unused
  - Canceled
- **Payment status:** Click the field and select the payment status from the available options:
  - Unpaid
  - Paid
- **Date range: From:** To view gift card orders placed on a specific date, select the desired date in this field.

  To filter the gift card orders placed within a date range, select the start date by clicking the field.

  A calendar will appear; choose the date, and it will be added to the field.

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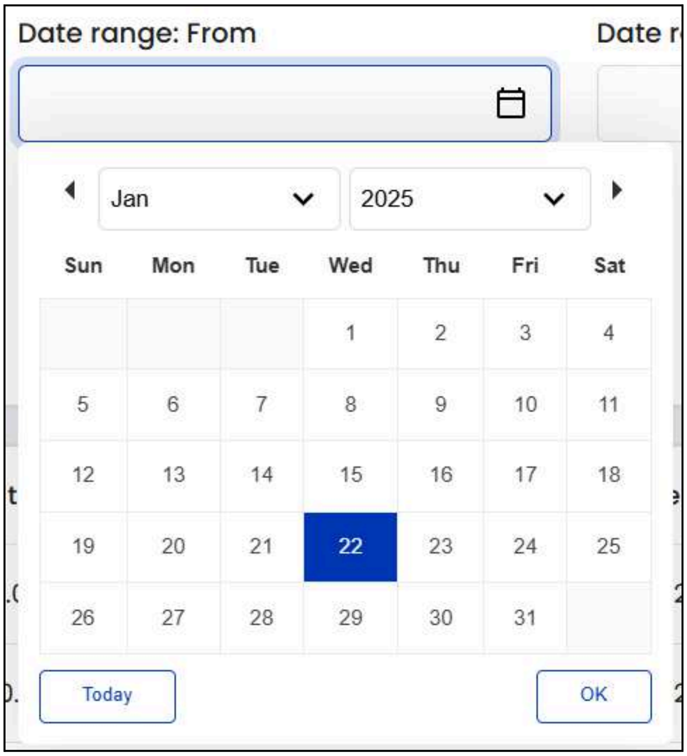

Use the **Today** button to select today's date and **Ok** to close the calendar.

- **Date range: To:** Select the ending date of the range in this field.

*The **Date range: From** value must always be an earlier date, and the **Date range: To** value must be later than the date selected in the **Date range: From** field.*

*For example, if the **Date range: From** is 09/24/2020, the **Date range: To** must be a date after this, such as 09/25/2020 or any future date. If incorrect dates are entered, no results will be displayed in the list.*

Search for a gift card order by filling in a single field or multiple fields. To view gift card orders placed within a specific date range, use the date fields.

After filling in the desired fields, click **Search** to display the results. Click **Clear** to reset all fields and start a new search.

Export gift card orders data

To export the gift card orders data from this page, click **Export** from the upper-right corner.

The data will be downloaded as a `.csv` file (Comma-Separated Values), which can be used for backups or external purposes.

A success message will appear once the download is complete.

To export specific gift card orders data, use the [search bar] to apply the necessary filters and define the criteria.

After setting the filters and clicking **Search** to view the results, click **Export** to download the filtered data as a `.csv` file.

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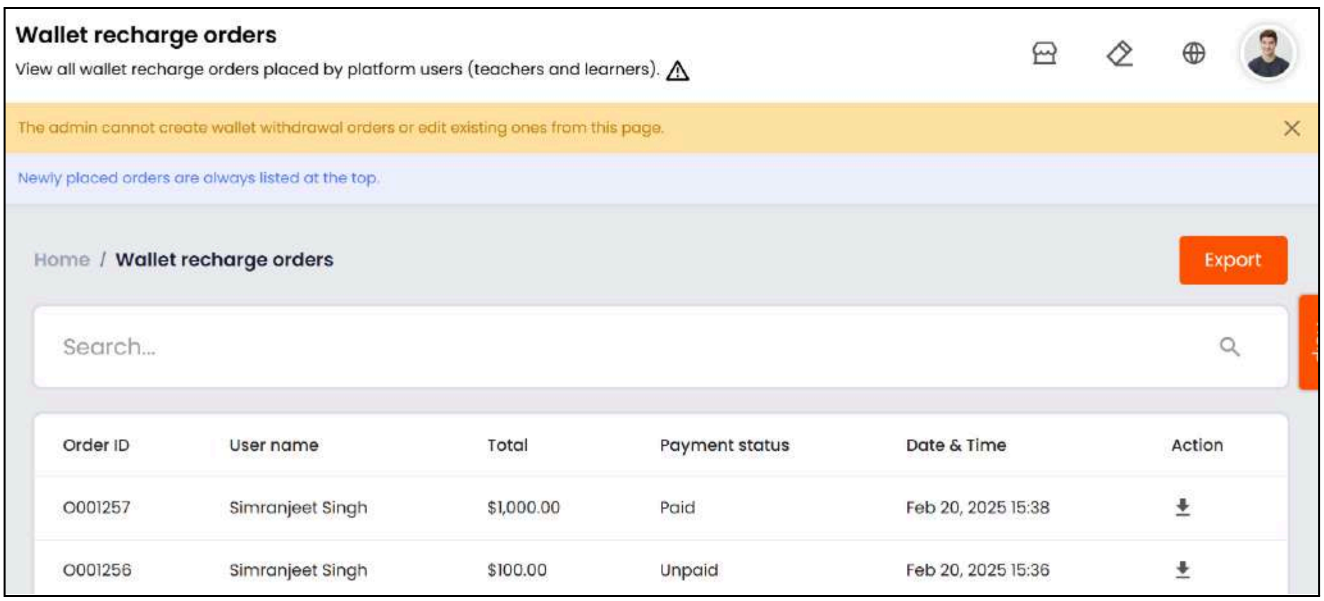
7.9 Wallet recharge orders

Each wallet recharge made by a teacher or learner on the platform creates a wallet recharge order, which is listed under this submodule.

You can download the order invoice from this page.

Kindly note that this submodule is limited to tracking orders, viewing their details, and downloading invoices.

You can take actions like canceling the order or adding the transaction details, against unpaid wallet recharge orders and bank transfer wallet recharge orders under the All orders submodule.



The list will be empty if you recently purchased the platform and chose not to include dummy content provided by FATbit during installation, or if no orders have been placed yet.

Users can recharge their wallets using any active payment method on the platform, including bank transfer, PayPal, Stripe, etc.

If a user selects bank transfer, you are required to review the order details on the All orders page and mark the payment as received to complete the wallet recharge.

When you do this, the payment status will be changed to paid.

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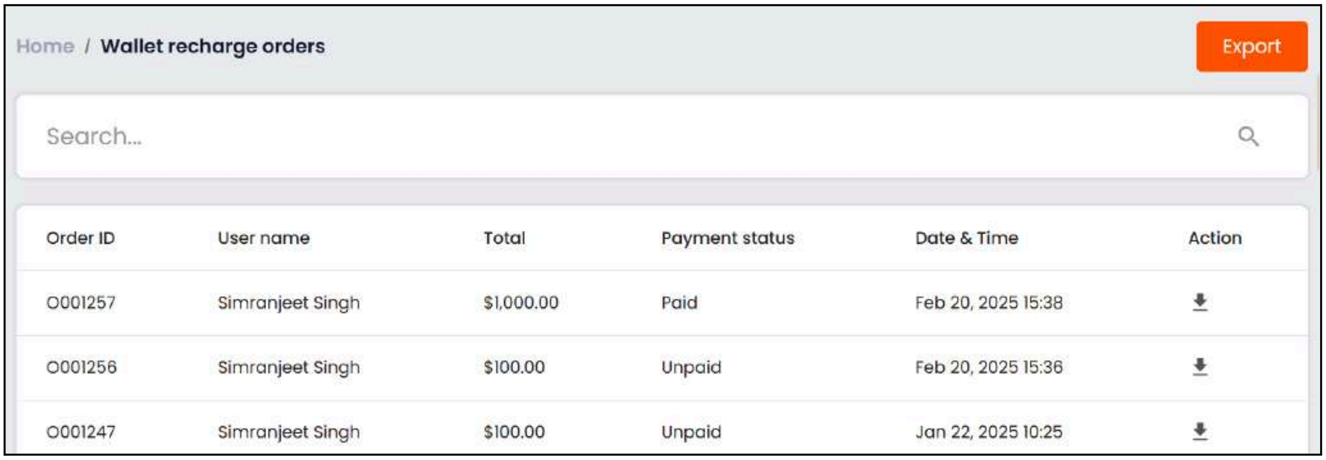
Manage the wallet recharge orders list



The list displays the following details for each wallet recharge order:

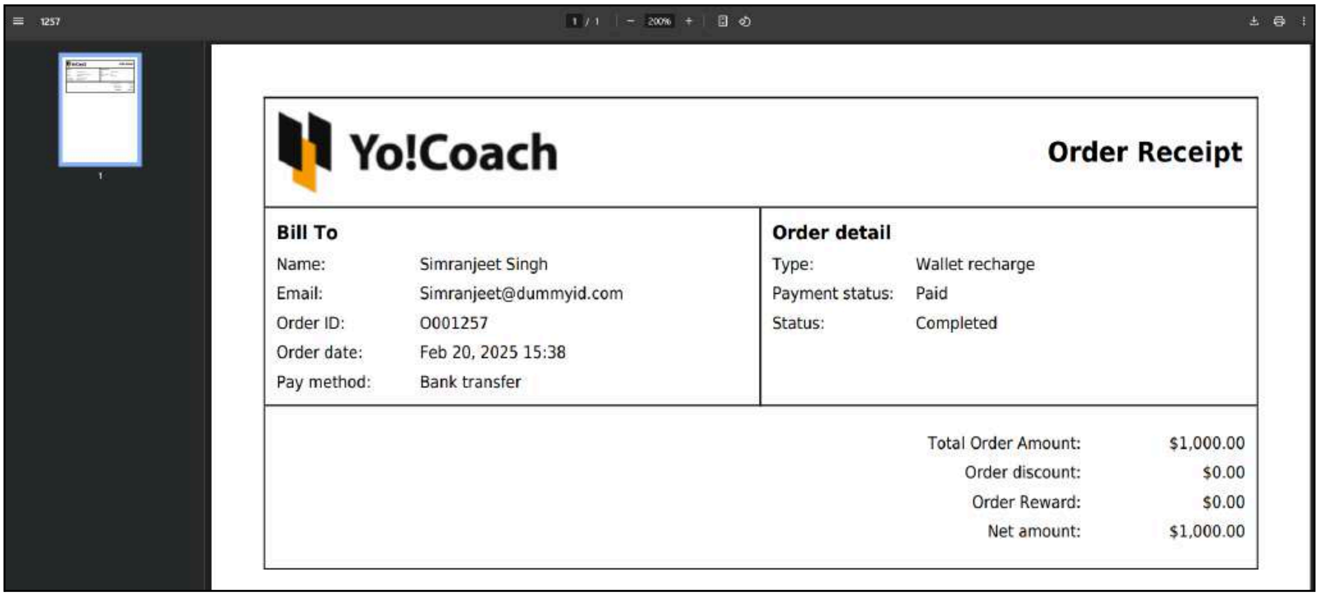
- **Order ID:** A unique identifier assigned to every order.
- **User name:** The name of the user who placed the order.
- **Total:** The total amount paid for the wallet recharge.
- **Payment status:** This defines the payment status of the order, which can be either paid or unpaid.
- **Date & Time:** The date and time when the order was placed.

Action button

There is a single action button next to each entry—**Download invoice** .

Click this to **view** and **download** the order invoice.

The invoice will open in PDF format in a new tab.



Review the invoice and click the **Download** button in the upper-right corner to save the PDF to your system.

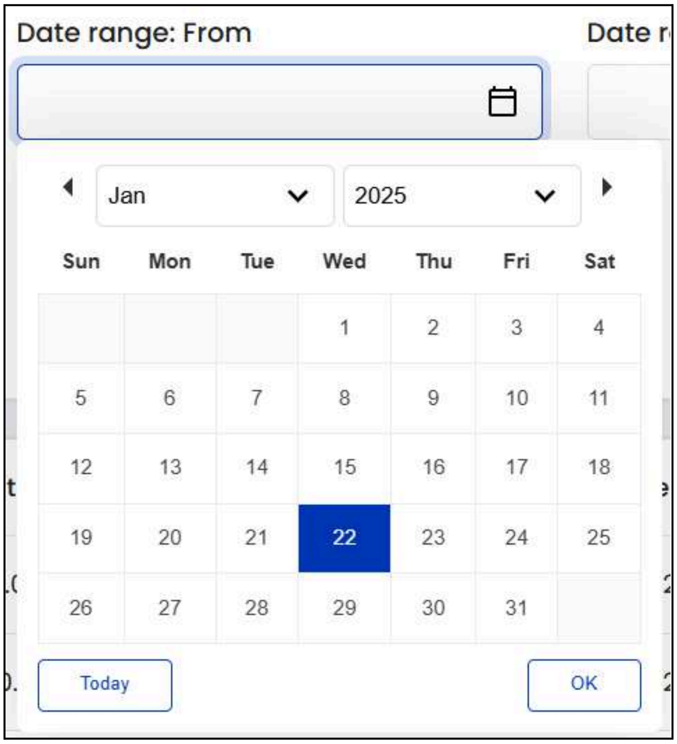
Search for a wallet recharge order

Use the search functionality at the top of the list to find a specific wallet recharge order.

Click the search bar or 🔍 to expand it. Click ✕ or the search bar again to collapse the section.

There are several filters that help narrow down the search. Each field is explained below:

- **Keyword:** Enter the order ID you are searching for in this field. You can also use this field to search for the user who made the purchase.
- **Payment status:** Click the field and select the payment status from the available options:
  - Unpaid
  - Paid
- **Date range: From:** To view wallet recharge orders placed on a specific date, select the desired date in this field. To filter the wallet recharge orders placed within a date range, select the start date by clicking the field. A calendar will appear; choose the date, and it will be added to the field.



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The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

Use the **Today** button to select today's date and **Ok** to close the calendar.

- **Date range: To:** Select the ending date of the range in this field.

*The **Date range: From** value must always be an earlier date, and the **Date range: To** value must be later than the date selected in the **Date range: From** field.*

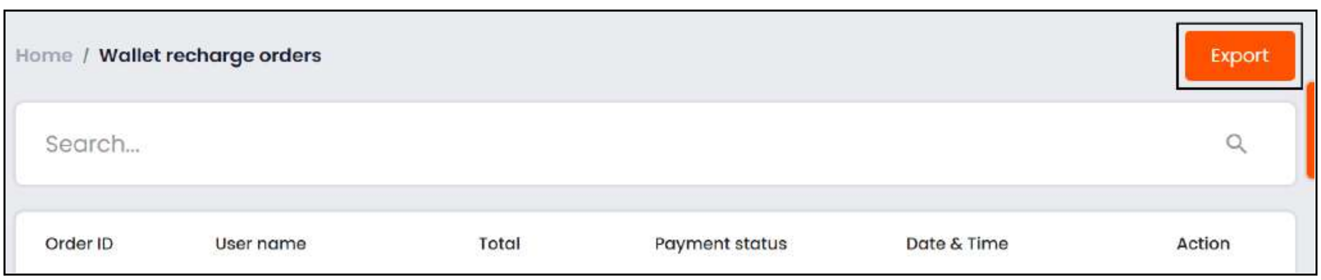
*For example, if the **Date range: From** is 09/24/2020, the **Date range: To** must be a date after this, such as 09/25/2020 or any future date. If incorrect dates are entered, no results will be displayed in the list.*

Search for a wallet recharge order by filling in a single field or multiple fields. To view the wallet recharge orders using their start date and end date, use the respective date fields.

After filling in the desired fields, click **Search** to display the results. Click **Clear** to reset all fields and start a new search.

Export wallet recharge orders data

To export the wallet recharge orders data from this page, click **Export** from the upper-right corner.



The data will be downloaded as a `.csv` file (Comma-Separated Values), which can be used for backups or external purposes. A success message will appear once the download is complete.

To export specific wallet recharge orders data, use the [search bar](#) to apply the necessary filters and define the criteria. After setting the filters and clicking **Search** to view the results, click **Export** to download the filtered data as a `.csv` file.

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An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

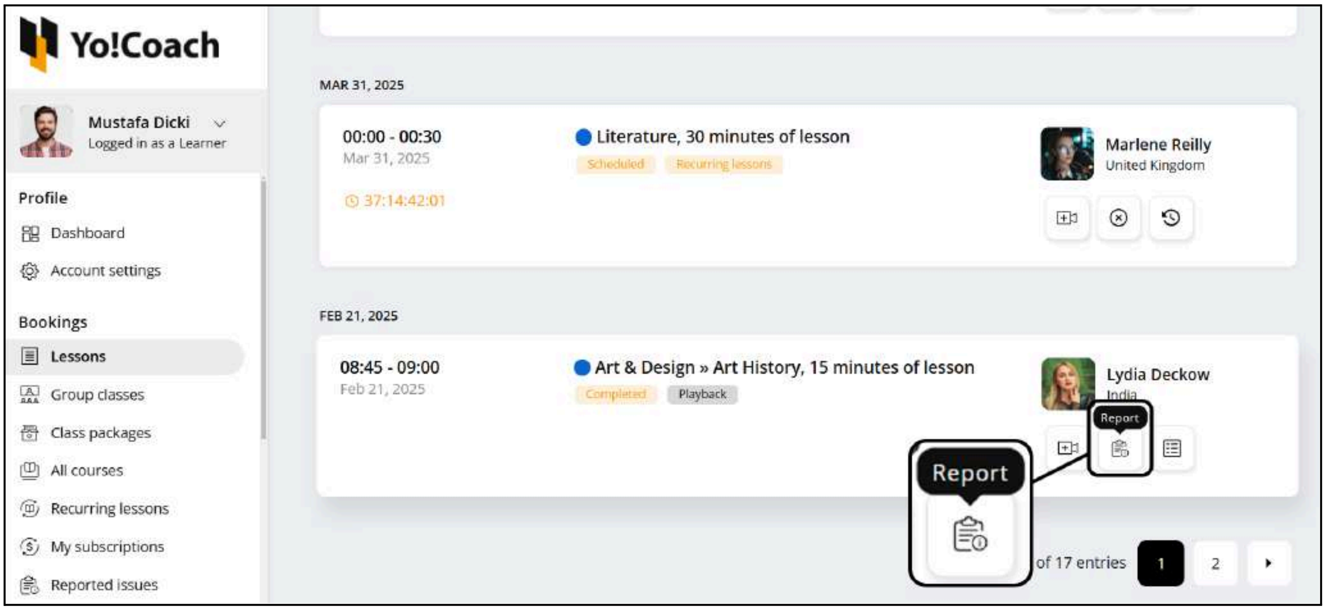
8. Issues reported

Yo!Coach allows learners to report issues whenever they feel that they did not receive the best for what they paid.

All the reported issues and escalated issues will be listed and can be managed under this module.

How "reporting an issue" works

After a lesson or class is delivered, learners can report issues related to the teacher or the session via their dashboard.



> *Kindly note that learners can report issues only after a class or lesson is completed and within the time frame you set under **Settings > System configurations >** [System](#) **>** [Report/Escalate issue time post session completion](#).*

Clicking **Report** opens the **Report an issue** form.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

The learner needs to choose the reason (subject) for reporting an issue and add their own comments as well. Kindly note that only the reporting reasons defined by you under **Teacher preferences** > Report issue reasons are available for selection.

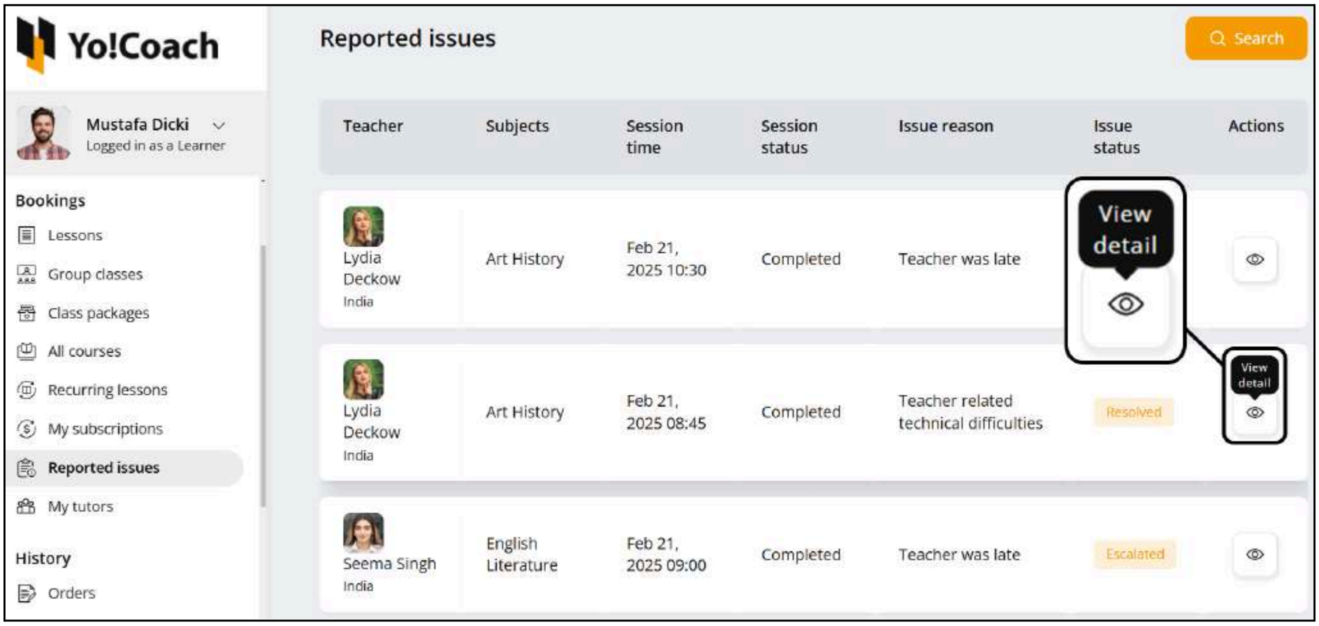
Once a report is submitted, it is first sent to the teacher, who must take action on it. Refer to the Teacher manual for details on the available actions.

You can also review the reported issue details and logs under the All reported issues submodule. However, you can only take action if the issues are escalated to you.

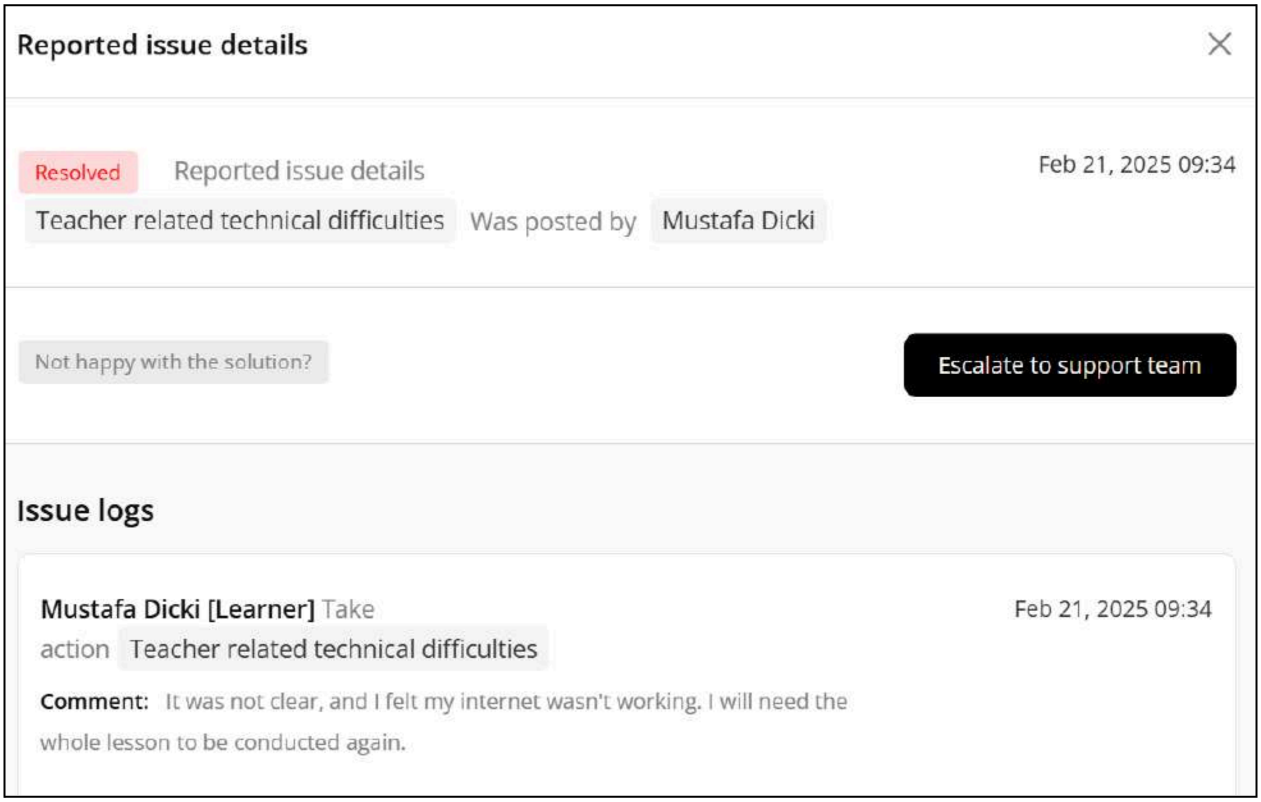
Escalating a reported issue

If a teacher resolves a reported issue and the learner is not satisfied, they can escalate it to the support team.

To escalate, learners must review the issue details for the respective lesson or group lesson from the **Reported issues** page or from the **Lessons/Group classes** page.



The **Reported issue details** form will appear.



<u>**DISCLAIMER:**</u> The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

Once the learner clicks **Escalate to support team,** the issue will be escalated to you.

Kindly note that learners can escalate an issue only after the resolution has been provided by the teacher and within the time frame you set under ***Settings > System configurations > System > Report/Escalate issue time post session completion****.*

All escalated issues appear under the Escalated issues submodule, where you are responsible for reviewing them and providing a resolution.

View all reports that have been placed, resolved and the escalated issues under this module.

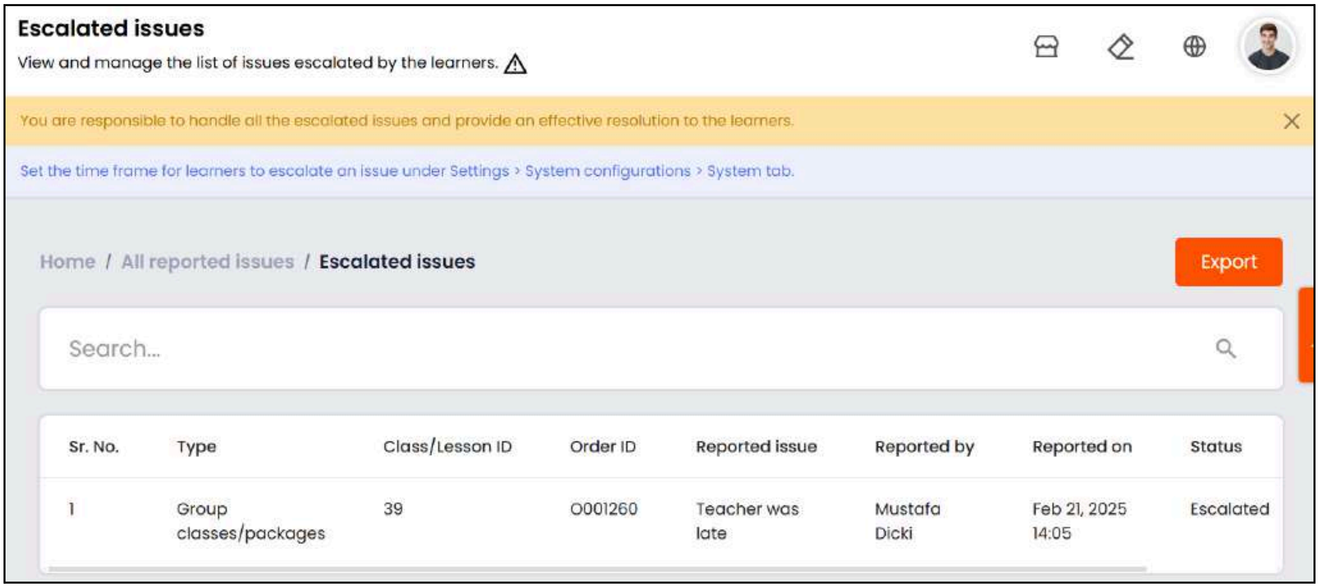
Expand this module to explore its submodules. Click on any submodule to visit its respective page.

Each submodule is explained in detail.

8.1 Escalated issues

Once a learner escalates a reported issue, it is listed under this submodule.

View and manage all these escalated issues and take action on them.



The list will be empty if you recently purchased the platform and chose not to include dummy content provided by FATbit during installation, or if no issues have been escalated to you yet or if all escalated issues have been resolved.

Manage the escalated issues list

The list displays the following details for each escalated issue:

- **Sr. No:** Serial number.
- **Type:** This defines if the issue was reported for a group class or a lesson.
- **Class/Lesson ID:** The group class ID or the lesson ID.
- **Order ID:** The main order ID of the lesson or group class order created.
- **Reported issue:** The reason selected by the learner when reporting an issue.

  Learners must choose from the predefined reasons you have defined under Teacher preferences > Report issue reasons, as they cannot create their own.
- **Reported by:** The name of the learner who reported the issue.
- **Reported on:** The date and time when the issue was reported.
- **Status:** The status of the reported issue. Since this list only includes escalated issues, the status will always be **Escalated**.

Action buttons

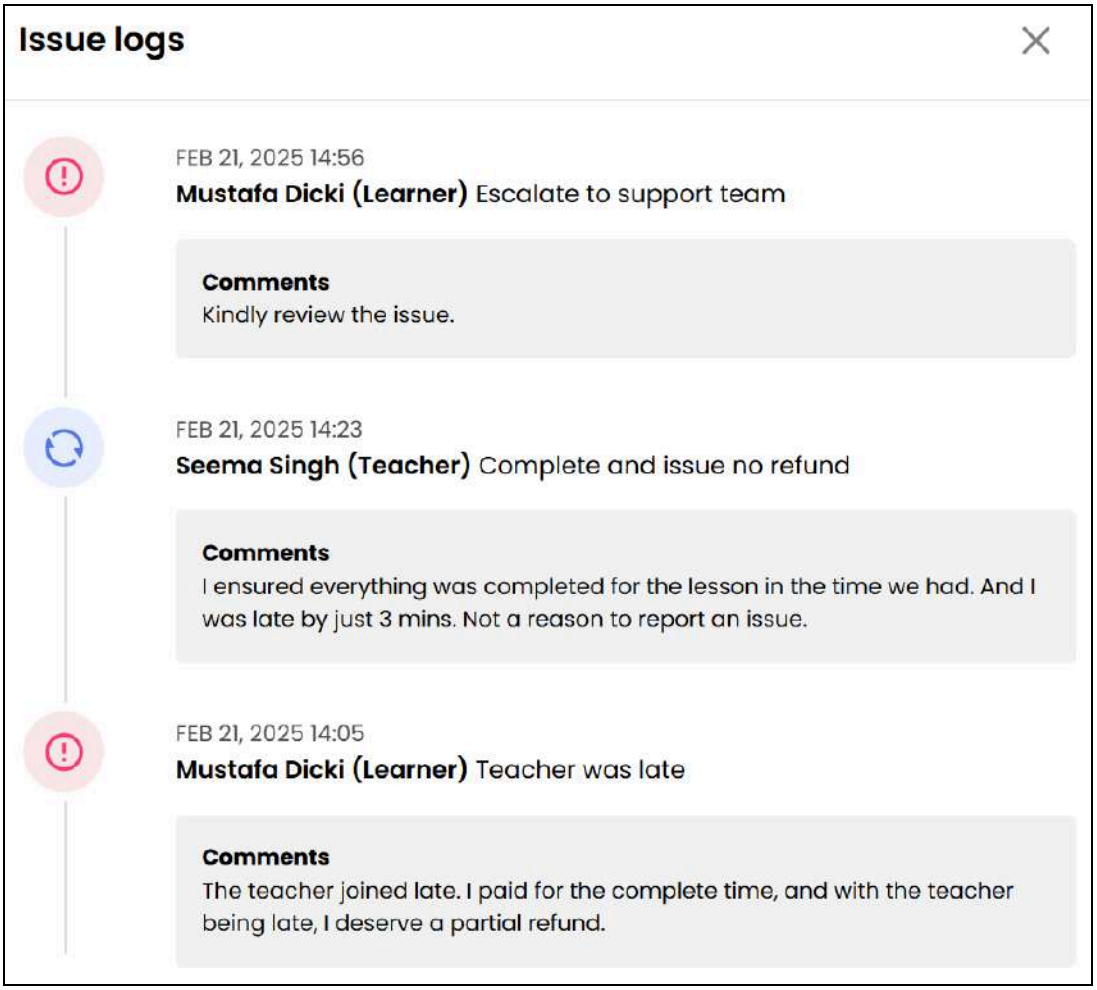
Under the **Action** column, each entry includes two action buttons, allowing you to perform specific actions.

The functions of each button are explained in detail below:

i. View

Click this next to an escalated issue to view its details.

A drawer will appear, displaying two sections - Issue logs and the Record details.



Review the history of the reported issue, including comments from both the teacher and the learner.

The details displayed include the user name, their profile type (teacher or learner), the date and time, the reported issue, and the comments they provided.

Below this is the Record details section which displays the details of the group class or lesson for which the learner reported an issue.

Record details

Subject:	English Literature
Order ID:	O001260
Record ID:	39
Total item:	1
Price:	$10.00
Discount:	$0.00
Reward discount:	$0.00
Net amount:	$10.00
Teacher name:	Seema Singh
Teacher join time:	Feb 21, 2025 13:36
Teacher end time:	Feb 21, 2025 13:58
Learner name:	Mustafa Dicki
Learner join time:	Feb 21, 2025 13:37
Learner end time:	Feb 21, 2025 13:58
Ended by:	Mustafa Dicki

This section in the drawer displays the following information:

- **Subject:** The subject taught during the session.
- **Order ID:** The main order ID of the lesson(s) or group class(es) order created.
- **Record ID:** The group class ID or the lesson ID.
- **Total item:** The number of items in the order, indicating whether the report was for a single lesson/group class or multiple. If multiple, this shows the total count.
- **Price:** The cost of the lesson(s) or group class(es) for which the issue was reported.

- **Discount:** The amount of discount applied on the lesson(s)/group class(es) price, if any.
- **Reward discount:** The reward discount applied on the lesson(s)/group class(es) price, if any.
- **Net amount:** The total amount paid by the learner for the lesson(s)/group class(es), after applying all discounts.
- **Teacher name:** The name of the teacher providing (or who has provided) the lesson/group class.
- **Teacher join time:** The date and time the teacher entered the session to begin teaching.

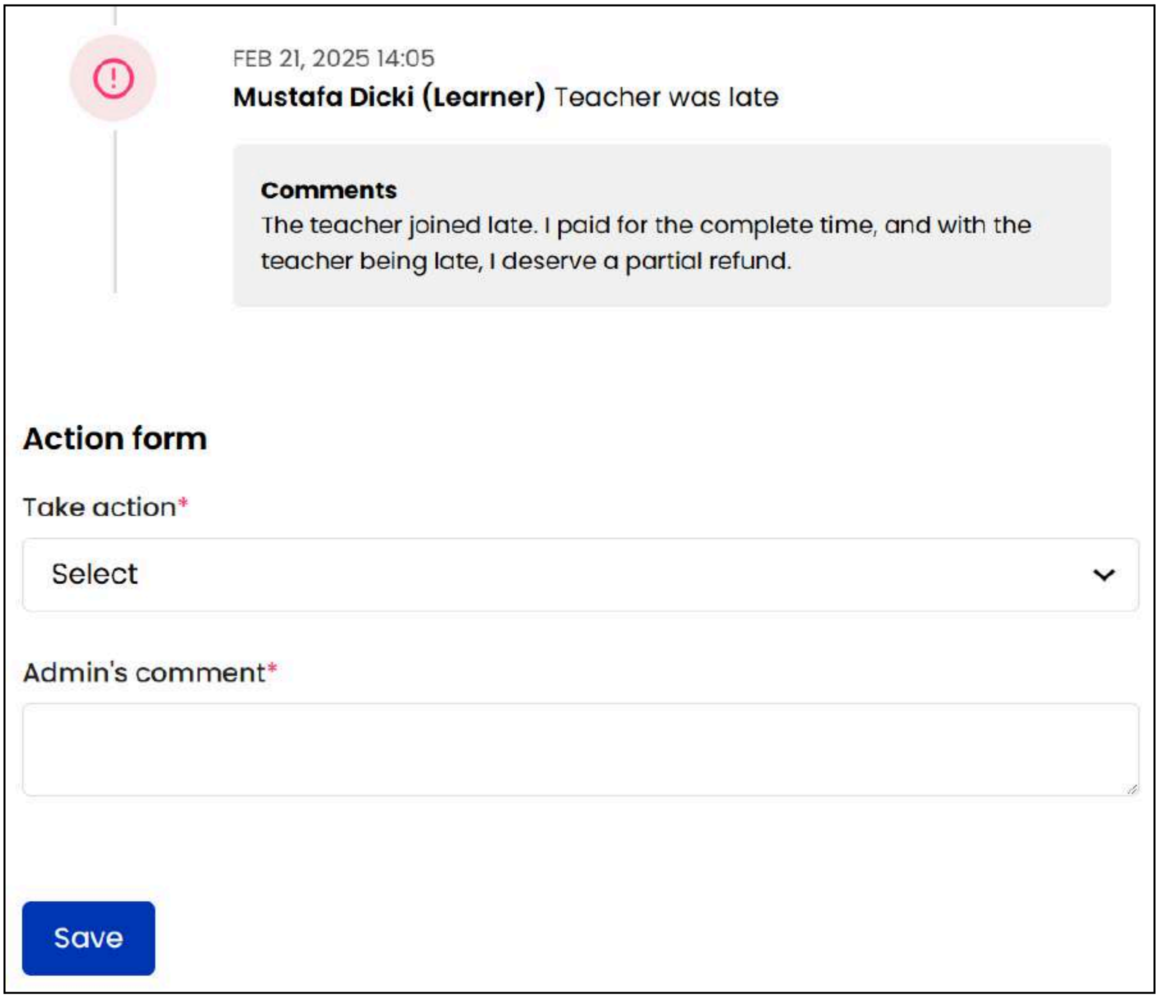
  If the teacher does not join the session, the learner can report the issue and request a refund.
- **Teacher end time:** The date and time the teacher marked the lesson/group class as completed.
- **Learner name:** The name of the learner who placed the order.
- **Learner join time:** The date and time the learner enters the session to attend the lesson/group class.
- **Learner end time:** The date and time the learner completes the lesson.
- **Ended by:** The name of the teacher or learner who ended the lesson/group class.

Review the details, then click ✕ in the upper-right corner of the drawer to close it.

ii. Update

Click to take action on the escalated issue.

A window appears, displaying the **Issue logs** and an **Action form** section below it, where you can proceed with resolution.



Update the following:

- **Take action*:** Click the field to select the appropriate action from the list of options in the dropdown list, which includes:
    - Mark complete and issue no refund
    - Mark complete and issue 50% refund
    - Mark complete and issue 100% refund
    - Reset and unschedule (available only for reported lessons)
- **Admin's comment*:** Enter a comment to explain your decision.

Once done, click **Save.**

Once resolved, the escalated issue is removed from the escalated issues list. To review its details, visit the [All reported issues] submodule.

Additionally, learners can no longer reopen the reported issue once the admin resolves it.

Search for an escalated issue

Use the search functionality at the top of the list to find a specific escalated issue.

Click the search bar or to expand it. Click or the search bar again to collapse the section.

There are several filters that help narrow down the search. Each field is explained below:

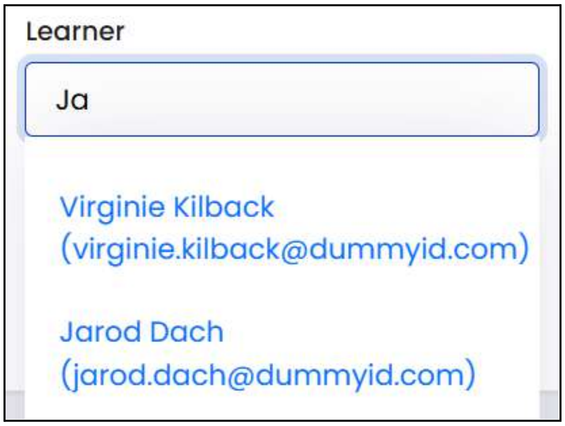
- **Teacher:** Enter the name of the teacher against whom the issue was reported.

  Place the cursor in the field and start typing. As you type, a list of matching results will appear.

Select the applicable option.

- **Learner:** Enter the name of the learner who reported the issue.

  Place the cursor in the field and start typing. As you type, a list of matching results will appear.



  Select the applicable option.

- **Status:** Click the field and select the status of the reported issue from the available options:
  - In progress
  - Escalated
  - Resolved
  - Closed
- **Order ID:** Enter the order ID for which the issue was reported.
- **Class/Lesson ID:** Enter the order ID for which the issue was reported.
- **Type:** Click the field and select the type of session for which the learner reported an issue from the available options:

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The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

- One-on-one lessons
- Group classes/packages

Search for an escalated issue by filling in a single field or multiple fields.

After filling in the desired fields, click **Search** to display the results. Click **Clear** to reset all fields and start a new search.

Export escalated issues data

To export the escalated issues data from this page, click **Export** from the upper-right corner.

The data will be downloaded as a `.csv` file (Comma-Separated Values), which can be used for backups or external purposes.

A success message will appear once the download is complete.

To export specific escalated issues data, use the [search bar]() to apply the necessary filters and define the criteria.

After setting the filters and clicking **Search** to view the results, click **Export** to download the filtered data as a `.csv` file.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
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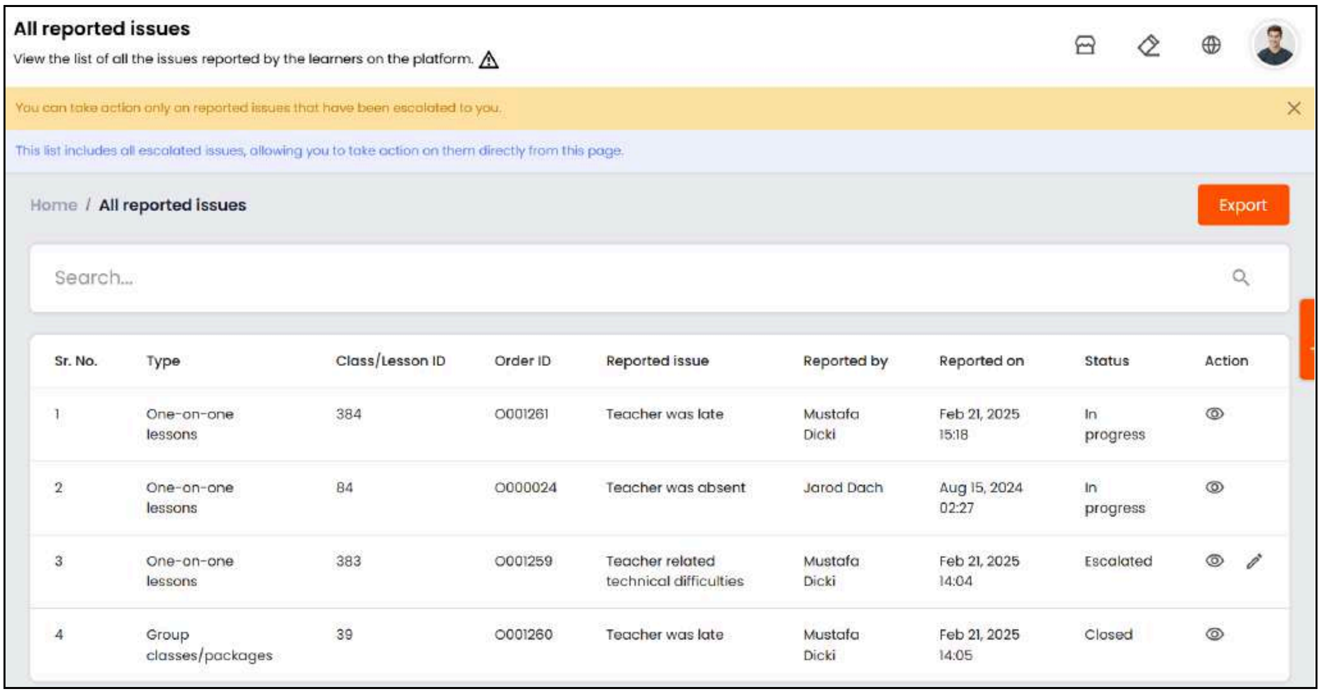
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

8.2 All reported issues

View and manage all issues reported by learners through this submodule. Track the history of each issue, review comments from teachers and learners, and take action on escalated issues directly from this submodule.

Learn more about the reporting process under the How "reporting an issue" works section.



The list will be empty if you recently purchased the platform and chose not to include dummy content provided by FATbit during installation, or if no issues have been reported yet.

The list displays issues sorted by their current status, with those in progress appearing first, followed by resolved, escalated, and closed issues.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

Manage the all reported issues list

The list displays the following details for each escalated issue:

- **Sr. No:** Serial number.
- **Type:** This defines if the issue was reported for a group class or a lesson.
- **Class/Lesson ID:** The group class ID or the lesson ID.
- **Order ID:** The main order ID of the lesson or group class order created.
- **Reported issue:** The reason selected by the learner when reporting an issue.

  Learners must choose from the predefined reasons you have defined under Teacher preferences > Report issue reasons, as they cannot create their own.
- **Reported by:** The name of the learner who reported the issue.
- **Reported on:** The date and time when the issue was reported.
- **Status:** The status of the reported issue including the issues in progress, resolved, closed and escalated.

Action buttons

Under the **Action** column, each entry displays one or two buttons, depending on its status.

Reported issues that are in progress, resolved or closed, will have only one action button—View.

Reported issues that have been escalated to you (which can also be reviewed under the escalated issues submodule) will have two action buttons—View and Update.

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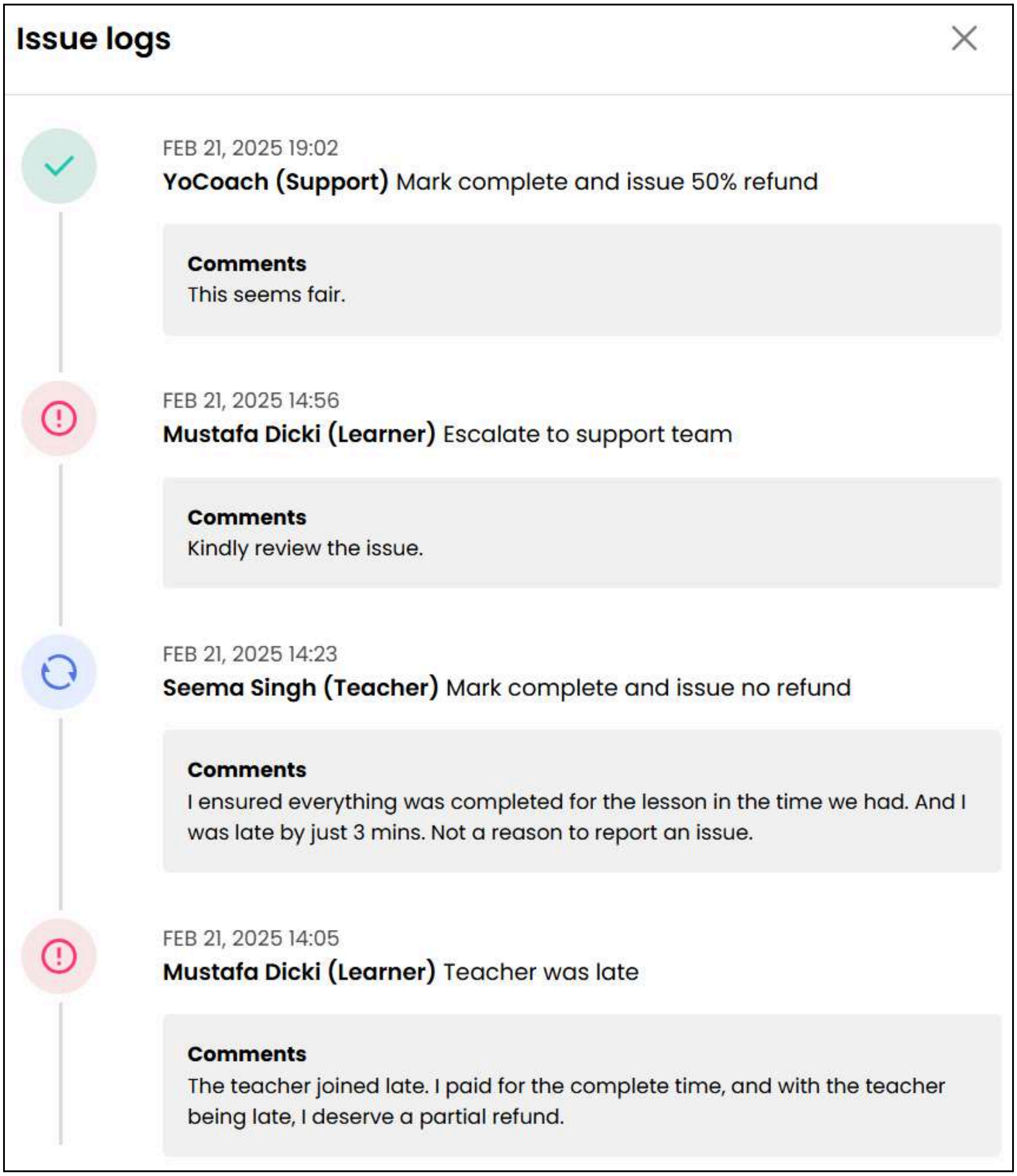
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

The function of each button is described in detail below.

i. View

Click this next to a reported issue to view its details.

A drawer will appear, displaying two sections - Issue logs and the Record details.



Review the history of the reported issue, including comments from the teacher, the learner, and, if applicable, your comments (in cases where the issue was escalated to you and you resolved it).

The details displayed include the user name, their profile type (teacher or learner), the date and time, the reported issue, and the comments they provided.

Below this is the **Record details** section which displays the details of the group class or lesson for which the learner reported an issue.

Record details

Subject:	English Literature
Order ID:	O001260
Record ID:	39
Total item:	1
Price:	$10.00
Discount:	$0.00
Reward discount:	$0.00
Net amount:	$10.00
Teacher name:	Seema Singh
Teacher join time:	Feb 21, 2025 13:36
Teacher end time:	Feb 21, 2025 13:58
Learner name:	Mustafa Dicki
Learner join time:	Feb 21, 2025 13:37
Learner end time:	Feb 21, 2025 13:58
Ended by:	Mustafa Dicki

This section in the drawer displays the following information:

- **Subject:** The subject taught during the session.

- **Order ID:** The main order ID of the lesson(s) or group class(es) order created.
- **Record ID:** The group class ID or the lesson ID.
- **Total item:** The number of items in the order, indicating whether the report was for a single lesson/group class or multiple. If multiple, this shows the total count.
- **Price:** The cost of the lesson(s) or group class(es) for which the issue was reported.
- **Discount:** The amount of discount applied on the lesson(s)/group class(es) price, if any.
- **Reward discount:** The reward discount applied on the lesson(s)/group class(es) price, if any.
- **Net amount:** The total amount paid by the learner for the lesson(s)/group class(es), after applying all discounts.
- **Teacher name:** The name of the teacher providing (or who has provided) the lesson/group class.
- **Teacher join time:** The date and time the teacher entered the session to begin teaching.

  If the teacher does not join the session, the learner can report the issue and request a refund.
- **Teacher end time:** The date and time the teacher marked the lesson/group class as completed.
- **Learner name:** The name of the learner who placed the order.
- **Learner join time:** The date and time the learner enters the session to attend the lesson/group class.
- **Learner end time:** The date and time the learner completes the lesson.
- **Ended by:** The name of the teacher or learner who ended the lesson/group class.

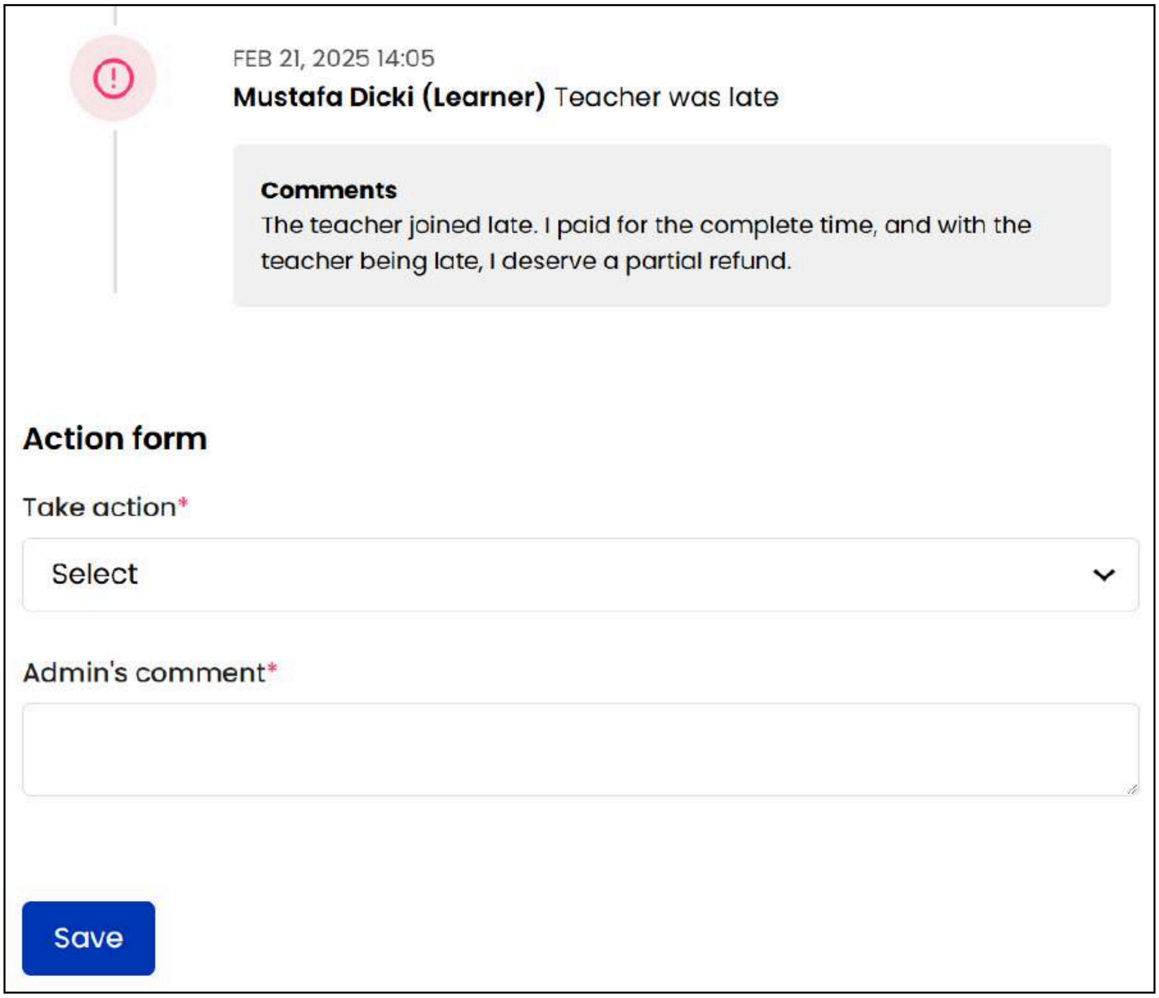
Review the details, then click X in the upper-right corner of the drawer to close it.

ii. Update

This action button is visible only for those reported issues that have been escalated to you for resolution.

Click to take action on the escalated issue.

A window appears, displaying the **Issue logs** and an **Action form** section below it, where you can proceed with resolution.



Update the following:

- **Take action*:** Click the field to select the appropriate action from the list of options in the dropdown list, which includes:
    - Mark complete and issue no refund
    - Mark complete and issue 50% refund

<u>**DISCLAIMER:**</u> The color theme and labels may differ in the screenshots compared to those on the platform.
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The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

- Mark complete and issue 100% refund
- Reset and unschedule (available only for reported lessons)

- **Admin's comment*:** Enter a comment to explain your decision.

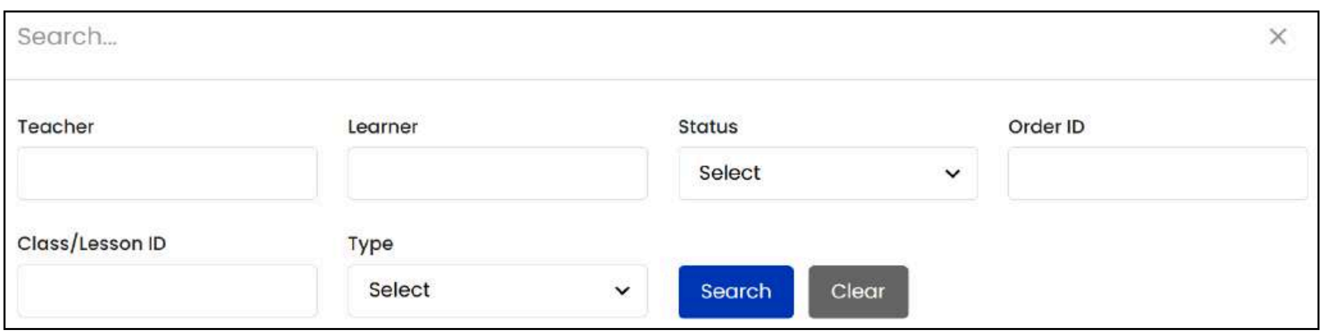
Once done, click **Save.**

Note that once an escalated issue is resolved, learners can no longer reopen the issue.

Search for a reported issue

Use the search functionality at the top of the list to find a specific reported issue.

Click the search bar or to expand it. Click or the search bar again to collapse the section.



There are several filters that help narrow down the search. Each field is explained below:

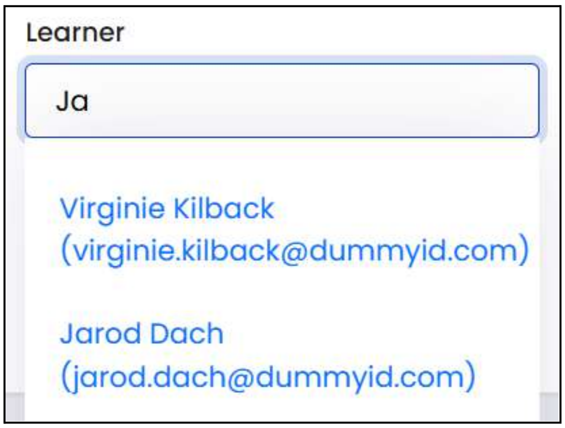
- **Teacher:** Enter the name of the teacher against whom the issue was reported.

Place the cursor in the field and start typing. As you type, a list of matching results will appear.

Select the applicable option.

- **Learner:** Enter the name of the learner who reported the issue.

  Place the cursor in the field and start typing. As you type, a list of matching results will appear.



Select the applicable option.

- **Status:** Click the field and select the status of the reported issue from the available options:
  - In progress
  - Escalated
  - Resolved
  - Closed

- **Order ID:** Enter the order ID for which the issue was reported.

- **Class/Lesson ID:** Enter the order ID for which the issue was reported.

- **Type:** Click the field and select the type of session for which the learner reported an issue from the available options:
    - One-on-one lessons
    - Group classes/packages

Search for an escalated issue by filling in a single field or multiple fields.

After filling in the desired fields, click **Search** to display the results. Click **Clear** to reset all fields and start a new search.

Export all reported issues data

To export all the reported issues data from this page, click **Export** from the upper-right corner.

The data will be downloaded as a `.csv` file (Comma-Separated Values), which can be used for backups or external purposes.

A success message will appear once the download is complete.

To export specific reported issues data, use the [search bar](#) to apply the necessary filters and define the criteria.

After setting the filters and clicking **Search** to view the results, click **Export** to download the filtered data as a `.csv` file.

9. Teacher preferences

As a system admin, you have the provision to set up the content for teacher preferences through this module. These preferences are used by the teachers on the platform to update their experience, qualifications, languages, lessons, learner preferences, and so forth.

Teacher preferences include the following:

- Accents
- Teaching levels
- Learner age groups
- Lesson components
- Test preparation options
- Spoken languages
- Language fluency levels
- Teaching subjects
- Report issue reasons

Based on your business requirements, you can restrict any preference from being displayed on the system front end.

To do this, remove all data associated with the preference. Once the data is removed, the preference will no longer be visible to other users.

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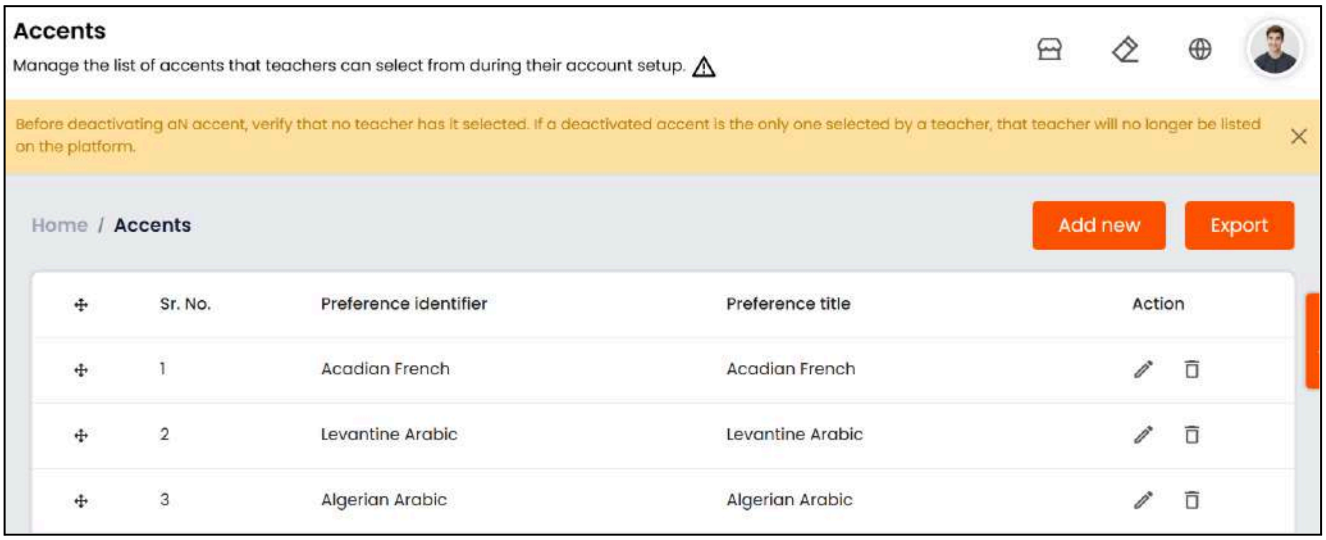
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

9.1 Accents

Every new teacher registering on the platform must select their spoken accent from a predefined list during their account creation. The spoken accent refers to the way they speak.

The selected accent appears on the respective teacher's profile, helping learners find the right match.

Use this submodule to define the list of accents that the teachers can choose from on the platform.



The list will be empty if you recently purchased the platform and chose not to include dummy content provided by FATbit during installation.

These accents also serve as filters on the teacher listing page, helping learners find teachers who match their preferences.

Manage the speaking accents list

Each entry in the list includes the following details and provides options for management including:

- **Drag-and-drop**  **:** Click this next to an accent to move it up or down the list, and the serial numbers will automatically update to reflect the new sequence.

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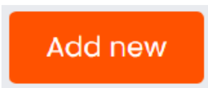
The accents will appear in the same order across all lists, including the accents list, teacher's profile, and the filter on the teacher's listing page.

- **Sr. No:** The serial number.
- **Preference identifier:** The accent's system identifier, used to save data in the system and not displayed anywhere on the platform.
- **Preference title:** The accent's name which will appear across all lists on the platform.

Add an accent

Click 

in the upper-right corner of the page to open the **Preference setup** form.

This form contains multiple tabs: the General tab, followed by the Primary language tab.

After that, you'll find the Secondary language tabs, corresponding to the languages available on your platform.

Let's start with the **General tab**.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

General tab

Update the following:

- **Preference identifier*:** Enter a unique accent identifier.

  It can match the accent name, as defined under the Language data tabs (e.g., English, Arabic, Spanish).

  The identifier is used to save data in the system and will not be displayed anywhere on the platform. Ensure the identifier is unique; otherwise, an error message will appear.

Once done, click **Save changes**.

This will direct you to the next tab, which is the primary language tab (English tab).

English tab

This is the primary language tab, and completing this tab is mandatory for publishing the accent on the platform.

Since English is set as the primary language, this tab is labeled **English**.

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The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

Update the following:

- **Name*:** Enter the accent name in the primary language.

  This name will be visible across all lists, including the accents list, teacher's profile, and the filter on the teacher's listing page.

- **Auto-translate into other languages:** Check mark this to automatically update the secondary language(s) data. The data in the subsequent language tab(s) will be auto-filled.

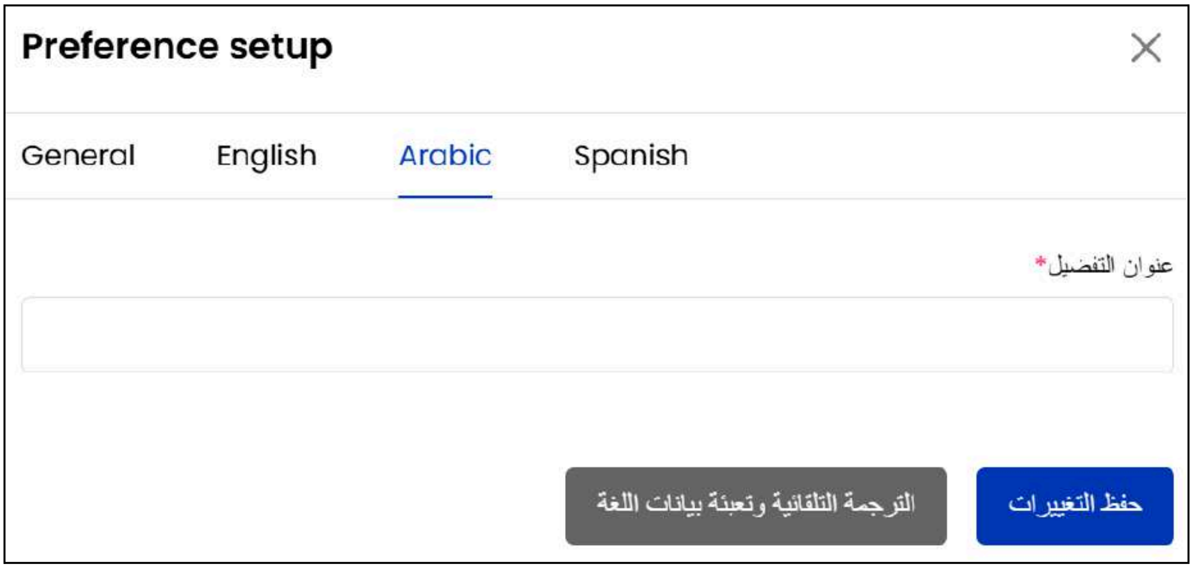
  *This feature is available only if the [Microsoft text translator API]() is configured under **Settings > System configurations >** [Third-party APIs]().*

  If you prefer to manually fill in the secondary language(s) data, leave the checkbox unselected.

Once done, click **Save changes**.

The next tab(s) will be the secondary language tab(s) (Arabic, Spanish, etc.), which include the same fields as the English tab.

Edit the details as needed and save.



*If you had selected the auto-translate option, the secondary language tab(s) will be prefilled. Review the data, make any necessary edits, click **Save changes**, and close the form.*

*If you did not use the auto-translate feature earlier, use the **Auto-translate & fill language data** button beside the **Save changes** button on each secondary language tab to auto-fill*

<u>**DISCLAIMER:**</u> The color theme and labels may differ in the screenshots compared to those on the platform.
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*the secondary language fields. Then, click **Save changes**, and move to the next tab, or close the form.*

*If you do not want to fill the secondary language tab(s) at this time, complete only the primary language tab (English tab), click **Save changes**, and close the form.*

After updating all necessary fields, click ✕ in the upper-right corner of the form.

The accent will then be added to the list.

Action buttons

Under the **Action** column, each entry includes two action buttons, allowing you to perform specific actions.

The functions of each button are explained in detail below:

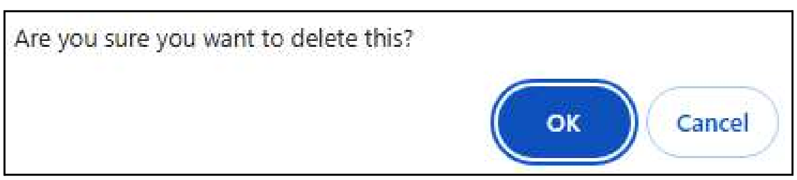
i. Edit

Click this to edit the accent's details. The Preference setup form will appear.

Update the fields, then click **Save changes**. To close the form, click ✕ in the upper-right corner.

ii. Delete

Click this to delete the accent from the system. A confirmation message will appear.



Click **OK** to confirm the action or **Cancel** to abort it.

When you delete an accent, teachers who have selected ONLY that accent will no longer be visible on the teacher listing pages.

Export accents data

To export the accents data from this page, click **Export** from the upper-right corner.

The data will be downloaded as a `.csv` file (Comma-Separated Values), which can be used for backups or external purposes.

A success message will appear once the download is complete.

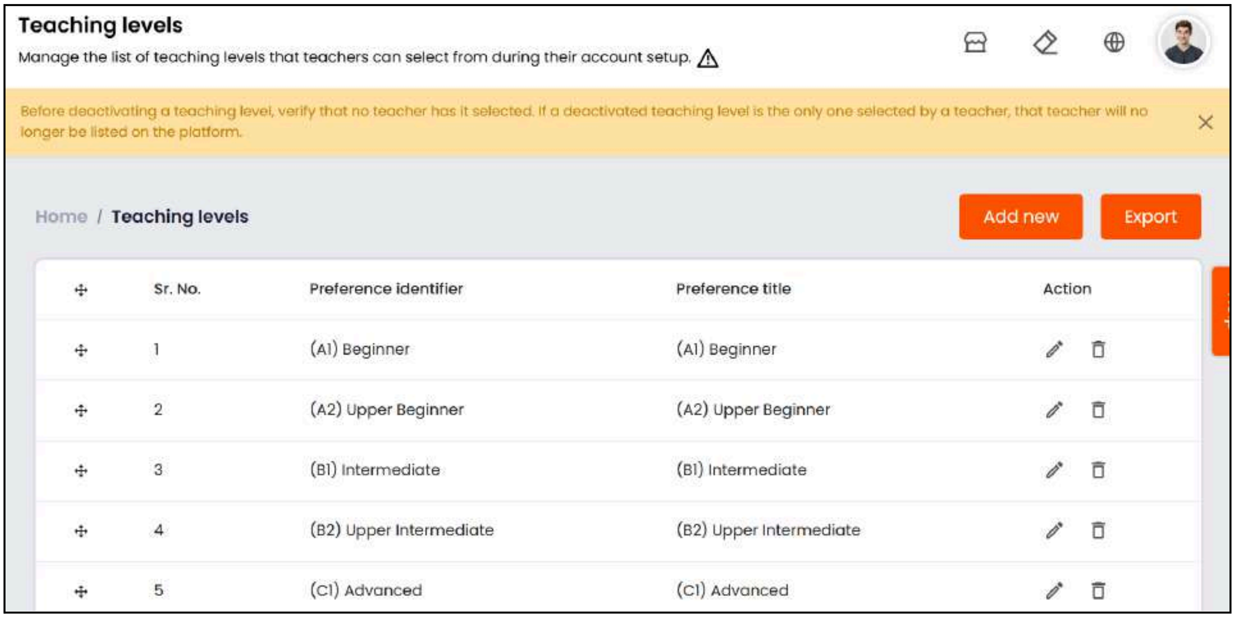
DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

9.2 Teaching levels

Every new teacher registering on the platform must select their teaching level from a predefined list during their account creation. The teaching level represents their subject expertise and the level they intend to teach on the platform.

The selected teaching level appears on the respective teacher's profile, helping learners find the right match.

Use this submodule to define the list of teaching levels that the teachers can choose from on the platform.



The list will be empty if you recently purchased the platform and chose not to include dummy content provided by FATbit during installation.

These teaching levels also serve as filters on the teacher listing page, helping learners find teachers who match their preferences.

Manage the teaching levels list

Each entry in the list includes the following details and provides options for management including:

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

- **Drag-and-drop** ✥**:** Click this next to a teaching level to move it up or down the list, and the serial numbers will automatically update to reflect the new sequence.

  The teaching levels will appear in the same order across all lists, including the teaching levels list, teacher's profile, and the filter on the teacher's listing page.

- **Sr. No:** The serial number.
- **Preference identifier:** The teaching level's system identifier, used to save data in the system and not displayed anywhere on the platform.
- **Preference title:** The teaching level's name which will appear across all lists on the platform.

Add a teaching level

Click Add new in the upper-right corner of the page to open the **Preference setup** form.

This form contains multiple tabs: the General tab, followed by the Primary language tab.

After that, you'll find the Secondary language tabs, corresponding to the languages available on your platform.

Let's start with the **General tab**.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

General tab

Update the following:

- **Preference identifier*:** Enter a unique teaching level identifier.

  It can match the teaching level name, as defined under the Language data tabs (e.g., English, Arabic, Spanish).

  The identifier is used to save data in the system and will not be displayed anywhere on the platform. Ensure the identifier is unique; otherwise, an error message will appear.

Once done, click **Save changes**.

This will direct you to the next tab, which is the primary language tab (English tab).

English tab

This is the primary language tab, and completing this tab is mandatory for publishing the teaching level on the platform.

Since English is set as the primary language, this tab is labeled **English**.

Update the following:

- **Name*:** Enter the teaching level name in the primary language.

  This name will be visible across all lists, including the teaching levels list, teacher's profile, and the filter on the teacher's listing page.

- **Auto-translate into other languages:** Check mark this to automatically update the secondary language(s) data. The data in the subsequent language tab(s) will be auto-filled.

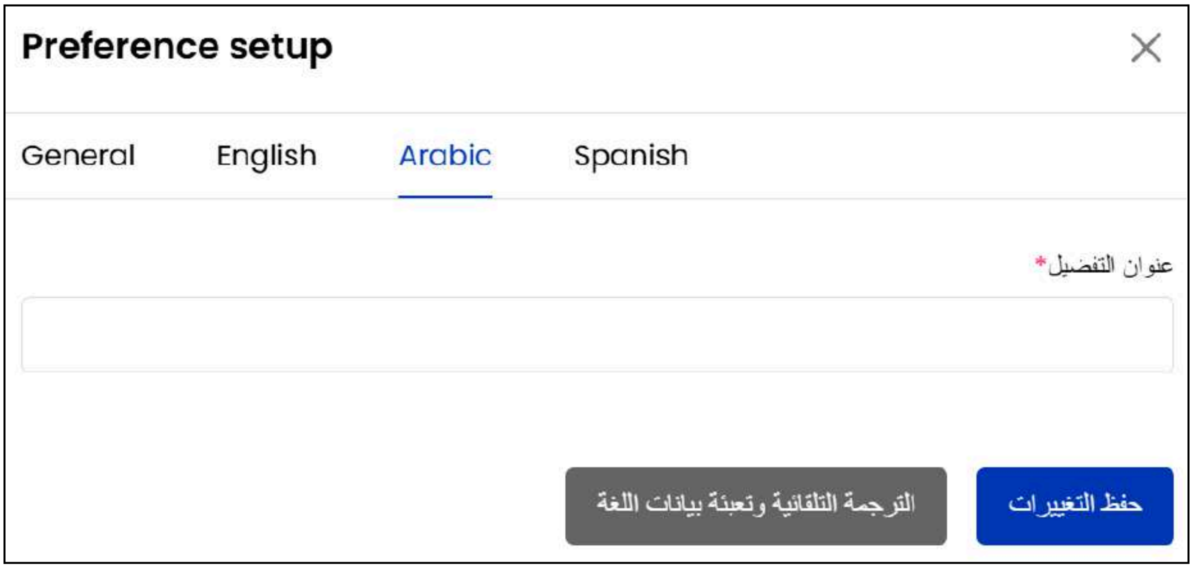
  *This feature is available only if the Microsoft text translator API is configured under **Settings > System configurations > Third-party APIs**.*

  If you prefer to manually fill in the secondary language(s) data, leave the checkbox unselected.

Once done, click **Save changes**.

The next tab(s) will be the secondary language tab(s) (Arabic, Spanish, etc.), which include the same fields as the English tab.

Edit the details as needed and save.



*If you had selected the auto-translate option, the secondary language tab(s) will be prefilled. Review the data, make any necessary edits, click **Save changes**, and close the form.*

*If you did not use the auto-translate feature earlier, use the **Auto-translate & fill language data** button beside the **Save changes** button on each secondary language tab to auto-fill*

*the secondary language fields. Then, click **Save changes**, and move to the next tab, or close the form.*

*If you do not want to fill the secondary language tab(s) at this time, complete only the primary language tab (English tab), click **Save changes**, and close the form.*

After updating all necessary fields, click in the upper-right corner of the form.

The teaching level will then be added to the list.

Action buttons

Under the **Action** column, each entry includes two action buttons, allowing you to perform specific actions.

The functions of each button are explained in detail below:

i. Edit

Click this to edit the teaching level's details. The Preference setup form will appear.

Update the fields, then click **Save changes**. To close the form, click in the upper-right corner.

ii. Delete

Click this to delete the teaching level from the system. A confirmation message will appear.

Click **OK** to confirm the action or **Cancel** to abort it.

When you delete a teaching level, teachers who have selected ONLY that teaching level will no longer be visible on the teacher listing pages.

Export teaching levels data

To export the teaching levels data from this page, click **Export** from the upper-right corner.

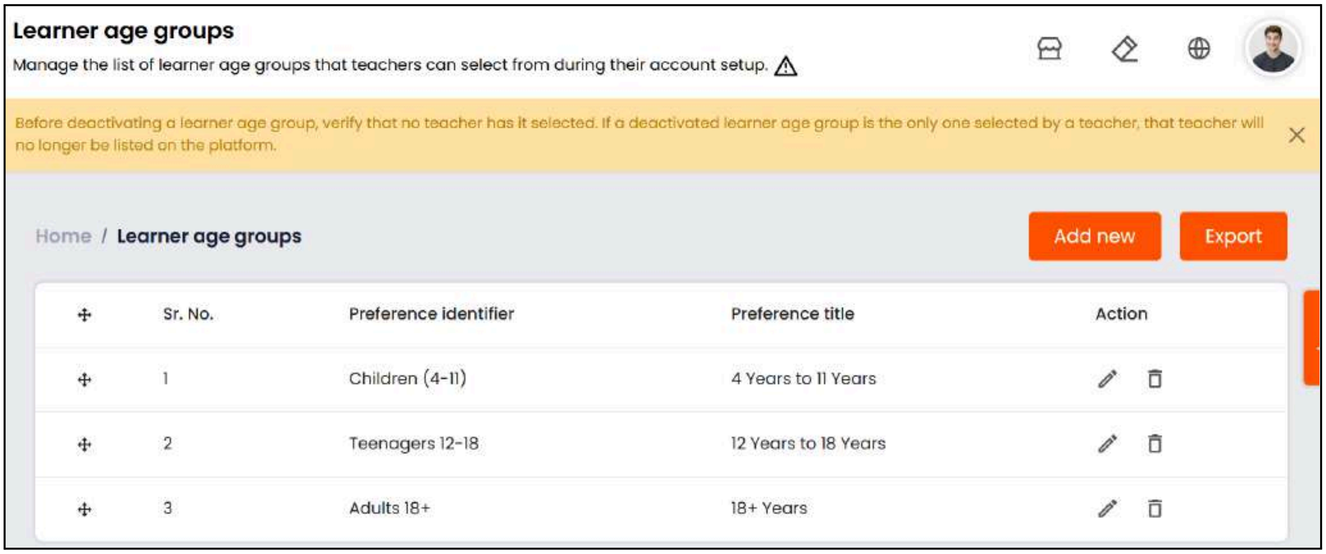
The data will be downloaded as a `.csv` file (Comma-Separated Values), which can be used for backups or external purposes. A success message will appear once the download is complete.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

9.3 Learner age groups

Every new teacher registering on the platform must select the age group of learners they want to teach from a predefined list during their account creation. The selected learner age group appears on the respective teacher's profile, helping learners find the right match.

Use this submodule to define the list of teaching levels that the teachers can choose from on the platform.



The list will be empty if you recently purchased the platform and chose not to include dummy content provided by FATbit during installation.

These learner age group options also serve as filters on the teacher listing page, helping learners find teachers who match their preferences.

Manage the learner age groups list

Each entry in the list includes the following details and provides options for management including:

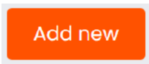
- **Drag-and-drop ✥:** Click this next to a learner age group to move it up or down the list, and the serial numbers will automatically update to reflect the new sequence.

  The learner age groups will appear in the same order across all lists, including the learner age groups list, teacher's profile, and the filter on the teacher's listing page.

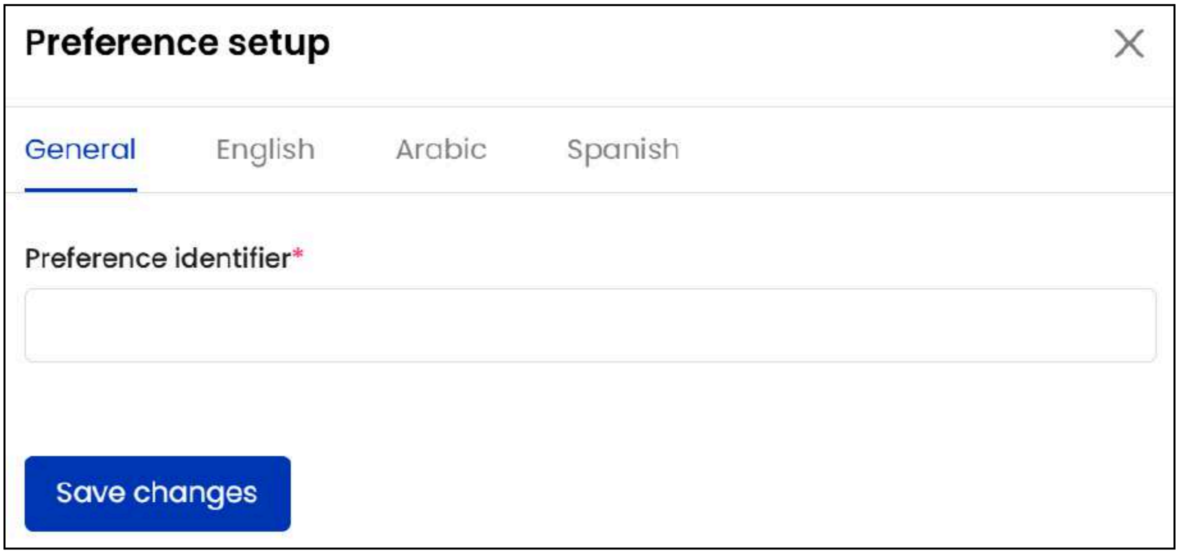
<u>**DISCLAIMER:**</u> The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

- **Sr. No:** The serial number.
- **Preference identifier:** The learner age group's system identifier, used to save data in the system and not displayed anywhere on the platform.
- **Preference title:** The learner age group's name which will appear across all lists on the platform.

Add a learner age group

Click 

in the upper-right corner of the page to open the **Preference setup** form.



This form contains multiple tabs: the General tab, followed by the Primary language tab.

After that, you'll find the Secondary language tabs, corresponding to the languages available on your platform.

Let's start with the **General tab**.

General tab

Update the following:

- **Preference identifier*:** Enter a unique learner age group identifier.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

It can match the learner age group name, as defined under the Language data tabs (e.g., English, Arabic, Spanish).

The identifier is used to save data in the system and will not be displayed anywhere on the platform. Ensure the identifier is unique; otherwise, an error message will appear.

Once done, click **Save changes**.

This will direct you to the next tab, which is the primary language tab (English tab).

English tab

This is the primary language tab, and completing this tab is mandatory for publishing the learner age group on the platform.

Since English is set as the primary language, this tab is labeled **English**.

Update the following:

- **Name*:** Enter the learner age group name in the primary language.

  This name will be visible across all lists, including the learner age groups list, teacher's profile, and the filter on the teacher's listing page.

- **Auto-translate into other languages:** Check mark this to automatically update the secondary language(s) data. The data in the subsequent language tab(s) will be auto-filled.

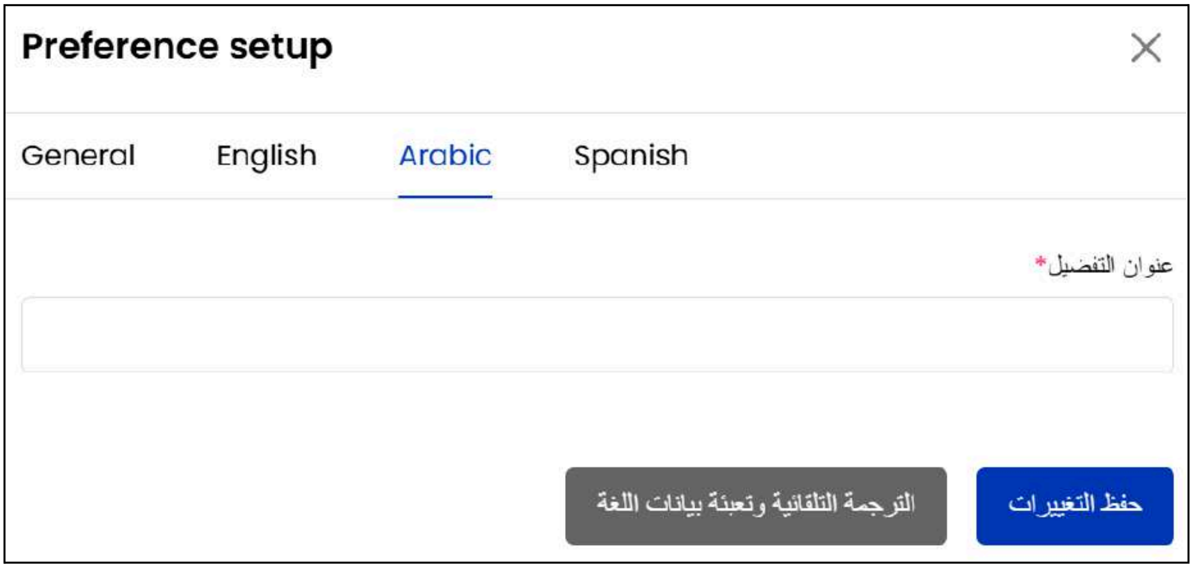
  *This feature is available only if the Microsoft text translator API is configured under **Settings > System configurations >** Third-party APIs.*

  If you prefer to manually fill in the secondary language(s) data, leave the checkbox unselected.

Once done, click **Save changes**.

The next tab(s) will be the secondary language tab(s) (Arabic, Spanish, etc.), which include the same fields as the English tab.

Edit the details as needed and save.



*If you had selected the auto-translate option, the secondary language tab(s) will be prefilled. Review the data, make any necessary edits, click **Save changes**, and close the form.*

*If you did not use the auto-translate feature earlier, use the **Auto-translate & fill language data** button beside the **Save changes** button on each secondary language tab to auto-fill the secondary language fields. Then, click **Save changes**, and move to the next tab, or close the form.*

*If you do not want to fill the secondary language tab(s) at this time, complete only the primary language tab (English tab), click **Save changes**, and close the form.*

After updating all necessary fields, click X in the upper-right corner of the form.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

The learner age group entry will then be added to the list.

Action buttons

Under the **Action** column, each entry includes two action buttons, allowing you to perform specific actions.

The functions of each button are explained in detail below:

i. Edit

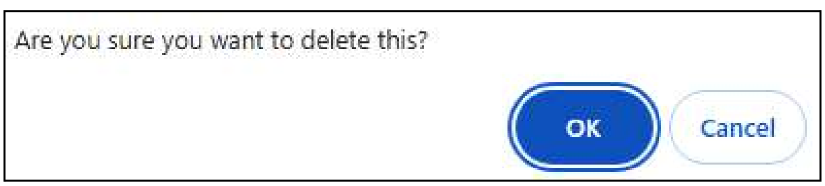
Click this to edit the learner age group's details. The Preference setup form will appear.

Update the fields, then click **Save changes**.

To close the form, click in the upper-right corner.

ii. Delete

Click this to delete the learner age group entry from the system. A confirmation message will appear.



Click **OK** to confirm the action or **Cancel** to abort it.

When you delete a learner age group, teachers who have selected ONLY that learner age group will no longer be visible on the teacher listing pages.

Export learner age groups data

To export the learner age groups data from this page, click **Export** from the upper-right corner.

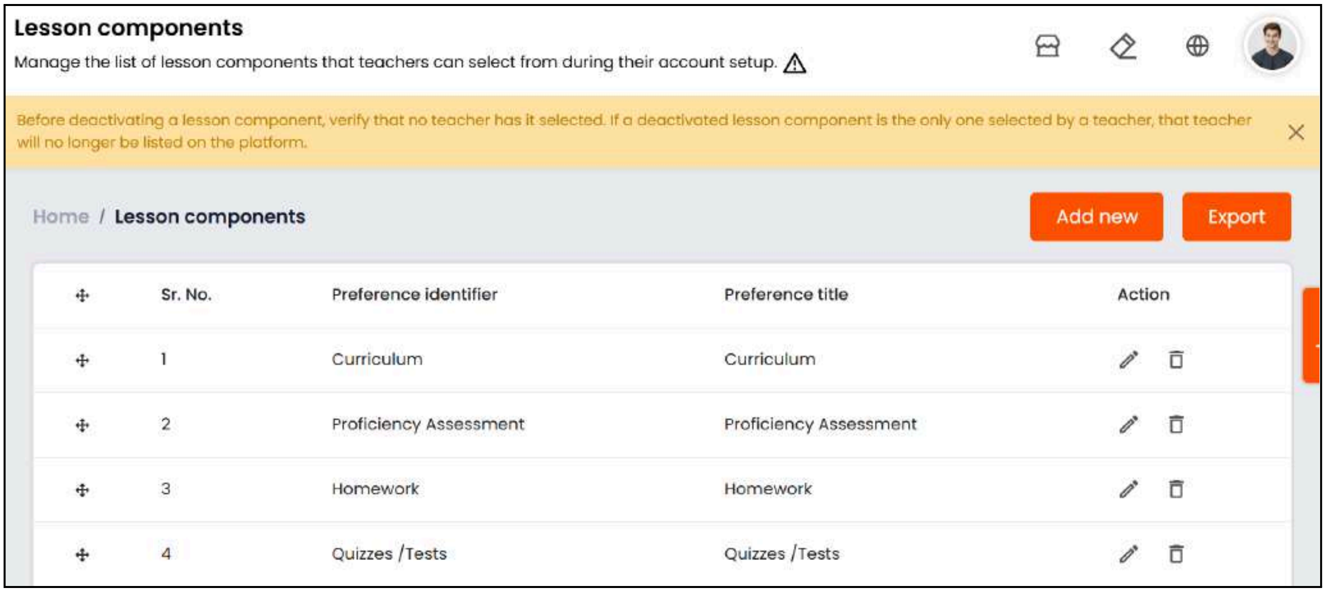
The data will be downloaded as a `.csv` file (Comma-Separated Values), which can be used for backups or external purposes.

A success message will appear once the download is complete.

9.4 Lesson components

Every new teacher registering on the platform must select all the components that will be available to learners in a lesson from a predefined list during their account creation. The selected lesson components appear on the respective teacher's profile, helping learners find the right match.

Use this submodule to define the list of lesson components that the teachers can choose from on the platform.



The list will be empty if you recently purchased the platform and chose not to include dummy content provided by FATbit during installation.

These lesson components also serve as filters on the teacher listing page, helping learners find teachers who match their preferences.

Manage the lesson components list

Each entry in the list displays the following details and allows management of the following:

- **Drag-and-drop :** Click this next to a lesson component to move it up or down the list, and the serial numbers will automatically update to reflect the new sequence.

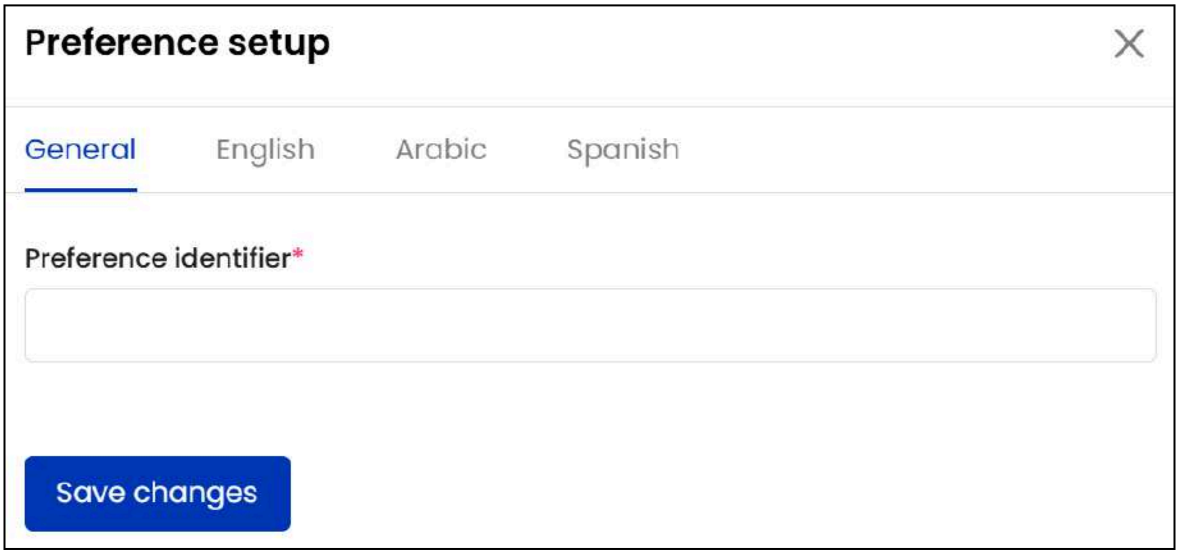
The lesson component will appear in the same order across all lists, including the lesson components list, teacher's profile, and the filter on the teacher's listing page.

- **Sr. No:** The serial number.
- **Preference identifier:** The lesson component's system identifier, used to save data in the system and not displayed anywhere on the platform.
- **Preference title:** The lesson component's name which will appear across all lists on the platform.

Add a lesson component

Click 

in the upper-right corner of the page to open the **Preference setup** form.



This form contains multiple tabs: the General tab, followed by the Primary language tab.

After that, you'll find the Secondary language tabs, corresponding to the languages available on your platform.

Let's start with the **General tab**.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

General tab

Update the following:

- **Preference identifier*:** Enter a unique lesson component identifier.

  It can match the lesson component name, as defined under the Language data tabs (e.g., English, Arabic, Spanish).

  The identifier is used to save data in the system and will not be displayed anywhere on the platform. Ensure the identifier is unique; otherwise, an error message will appear.

Once done, click **Save changes**.

This will direct you to the next tab, which is the primary language tab (English tab).

English tab

This is the primary language tab, and completing this tab is mandatory for publishing the lesson component on the platform.

Since English is set as the primary language, this tab is labeled **English**.

Update the following:

- **Name*:** Enter the lesson component name in the primary language.

  This name will be visible across all lists, including the lesson components list, teacher's profile, and the filter on the teacher's listing page.

- **Auto-translate into other languages:** Check mark this to automatically update the secondary language(s) data. The data in the subsequent language tab(s) will be auto-filled.

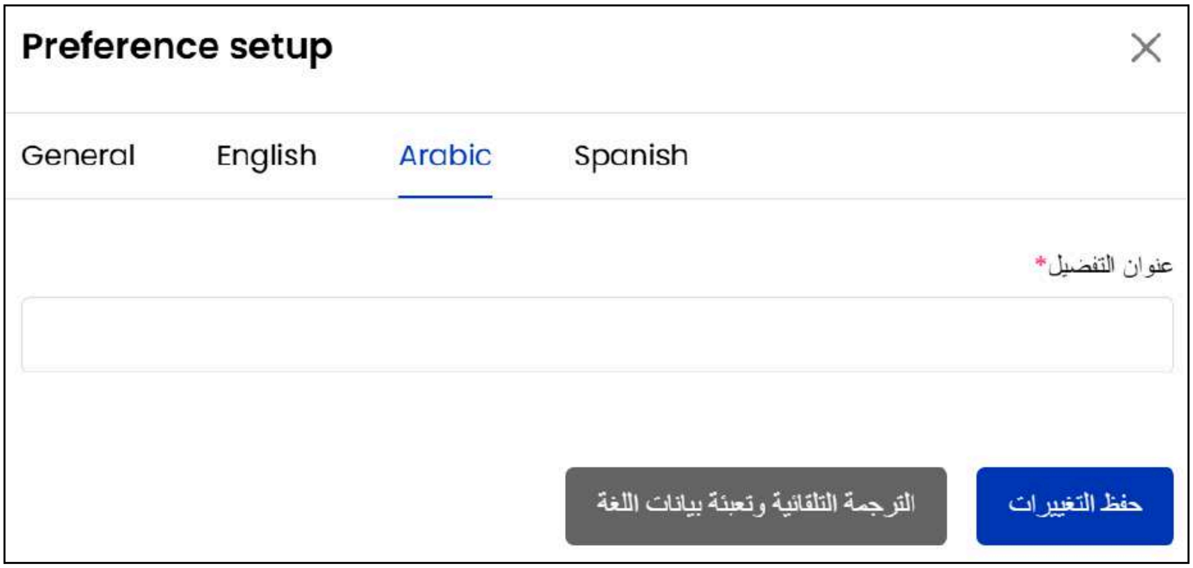
  *This feature is available only if the Microsoft text translator API is configured under **Settings > System configurations > Third-party APIs**.*

  If you prefer to manually fill in the secondary language(s) data, leave the checkbox unselected.

Once done, click **Save changes**.

The next tab(s) will be the secondary language tab(s) (Arabic, Spanish, etc.), which include the same fields as the English tab.

Edit the details as needed and save.



*If you had selected the auto-translate option, the secondary language tab(s) will be prefilled. Review the data, make any necessary edits, click **Save changes**, and close the form.*

*If you did not use the auto-translate feature earlier, use the **Auto-translate & fill language data** button beside the **Save changes** button on each secondary language tab to auto-fill*

*the secondary language fields. Then, click **Save changes**, and move to the next tab, or close the form.*

*If you do not want to fill the secondary language tab(s) at this time, complete only the primary language tab (English tab), click **Save changes**, and close the form.*

After updating all necessary fields, click in the upper-right corner of the form.

The lesson component will then be added to the list.

Action buttons

Under the **Action** column, each entry includes two action buttons, allowing you to perform specific actions.

The functions of each button are explained in detail below:

i. Edit

Click this to edit the lesson component's details. The [Preference setup] form will appear.

Update the fields, then click **Save changes**. To close the form, click in the upper-right corner.

ii. Delete

Click this to delete the lesson component from the system. A confirmation message will appear.

Click **OK** to confirm the action or **Cancel** to abort it.

When you delete a lesson component, teachers who have selected ONLY that lesson component will no longer be visible on the teacher listing pages.

<u>**DISCLAIMER:**</u> The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

Export lesson components data

To export the lesson components data from this page, click **Export** from the upper-right corner.

The data will be downloaded as a `.csv` file (Comma-Separated Values), which can be used for backups or external purposes.

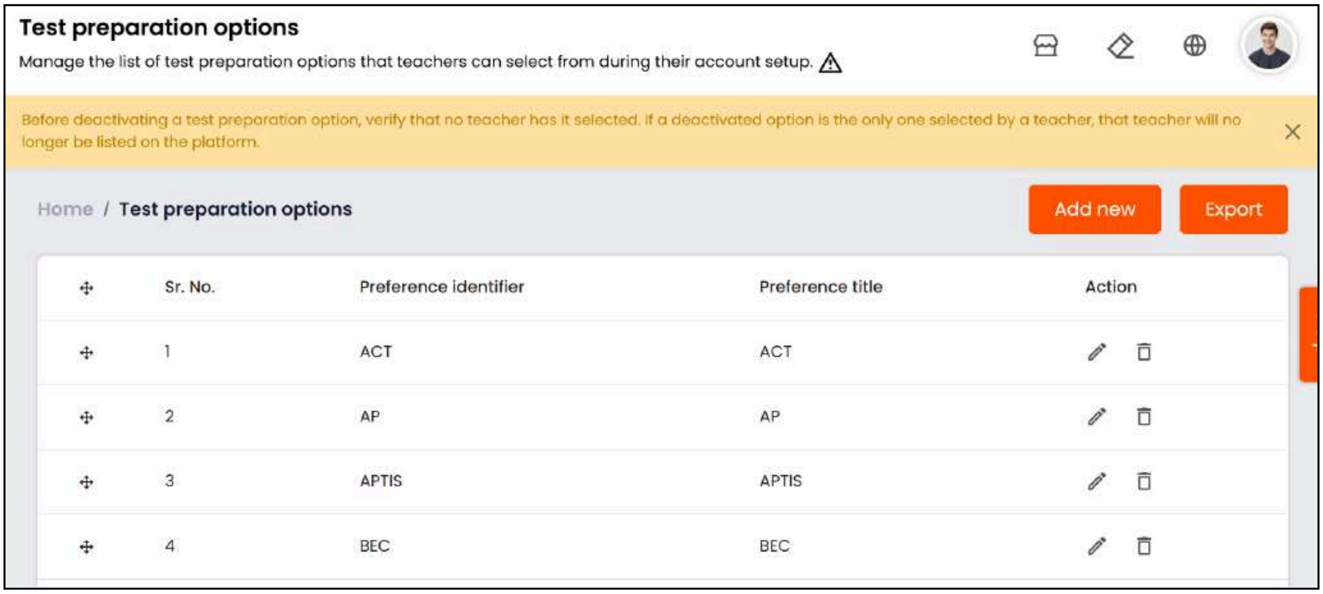
A success message will appear once the download is complete.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

9.5 Test preparation options

Every new teacher registering on the platform must select the test preparations they offer from a predefined list during their account creation. The selected test preparation options appear on the respective teacher's profile, helping learners find the right match.

Use this submodule to define the list of test preparation options that the teachers can choose from on the platform.



The list will be empty if you recently purchased the platform and chose not to include dummy content provided by FATbit during installation.

These test preparation options also serve as filters on the teacher listing page, helping learners find teachers who match their preferences.

Manage the test preparation options list

Each entry in the list includes the following details and provides options for management including:

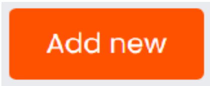
- **Drag-and-drop** **:** Click this next to a test preparation option to move it up or down the list, and the serial numbers will automatically update to reflect the new sequence.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

The test preparation option will appear in the same order across all lists, including the test preparation options list, teacher's profile, and the filter on the teacher's listing page.

- **Sr. No:** The serial number.
- **Preference identifier:** The test preparation option's system identifier, used to save data in the system and not displayed anywhere on the platform.
- **Preference title:** The test preparation option's name which will appear across all lists on the platform.

Add a test preparation option

Click 

in the upper-right corner of the page to open the **Preference setup** form.

This form contains multiple tabs: the [General]() tab, followed by the [Primary language]() tab.

After that, you'll find the [Secondary language]() tabs, corresponding to the languages available on your platform.

Let's start with the **General tab**.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

General tab

Update the following:

- **Preference identifier*:** Enter a unique test preparation option identifier.

  It can match the test preparation option name, as defined under the Language data tabs (e.g., English, Arabic, Spanish).

  The identifier is used to save data in the system and will not be displayed anywhere on the platform. Ensure the identifier is unique; otherwise, an error message will appear.

Once done, click **Save changes**.

This will direct you to the next tab, which is the primary language tab (English tab).

English tab

This is the primary language tab, and completing this tab is mandatory for publishing the test preparation option on the platform.

Since English is set as the primary language, this tab is labeled **English**.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

Update the following:

- **Name*:** Enter the test preparation option name in the primary language.

  This name will be visible across all lists, including the test preparation options list, teacher's profile, and the filter on the teacher's listing page.

- **Auto-translate into other languages:** Check mark this to automatically update the secondary language(s) data. The data in the subsequent language tab(s) will be auto-filled.

  *This feature is available only if the Microsoft text translator API is configured under **Settings > System configurations >** Third-party APIs.*

  If you prefer to manually fill in the secondary language(s) data, leave the checkbox unselected.

Once done, click **Save changes**.

The next tab(s) will be the secondary language tab(s) (Arabic, Spanish, etc.), which include the same fields as the English tab.

Edit the details as needed and save.

*If you had selected the auto-translate option, the secondary language tab(s) will be prefilled. Review the data, make any necessary edits, click **Save changes**, and close the form.*

*If you did not use the auto-translate feature earlier, use the **Auto-translate & fill language data** button beside the **Save changes** button on each secondary language tab to auto-fill*

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

*the secondary language fields. Then, click **Save changes**, and move to the next tab, or close the form.*

*If you do not want to fill the secondary language tab(s) at this time, complete only the primary language tab (English tab), click **Save changes**, and close the form.*

After updating all necessary fields, click in the upper-right corner of the form.

The test preparation option will then be added to the list.

Action buttons

Under the **Action** column, each entry includes two action buttons, allowing you to perform specific actions.

The functions of each button are explained in detail below:

i. Edit

Click this to edit the test preparation option's details. The [Preference setup](#) form will appear.

Update the fields, then click **Save changes**. To close the form, click in the upper-right corner.

ii. Delete

Click this to delete the test preparation option from the system. A confirmation message will appear.

Click **OK** to confirm the action or **Cancel** to abort it.

When you delete a test preparation option, teachers who have selected ONLY that test preparation option will no longer be visible on the teacher listing pages.

Export test preparation options data

To export the test preparation options data from this page, click **Export** from the upper-right corner.

The data will be downloaded as a `.csv` file (Comma-Separated Values), which can be used for backups or external purposes.

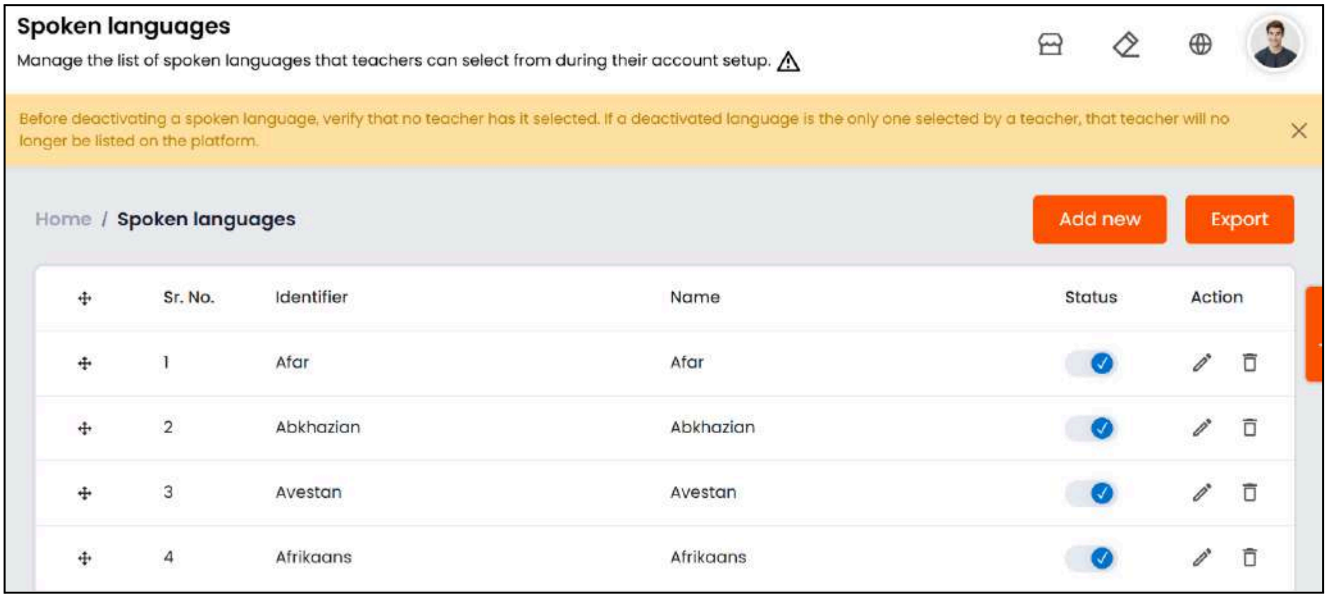
A success message will appear once the download is complete.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

9.6 Spoken languages

Every new teacher registering on the platform must select their spoken language from a predefined list during their account creation. The selected spoken language appears on the respective teacher's profile, helping learners find the right match.

Use this submodule to define the list of spoken languages that the teachers can choose from on the platform.



The list will be empty if you recently purchased the platform and chose not to include dummy content provided by FATbit during installation.

These spoken languages also serve as filters on the teacher listing page, helping learners find teachers who match their preferences.

Manage the spoken languages list

Each entry in the list includes the following details and provides options for management including:

- **Drag-and-drop :** Click this next to a spoken language to move it up or down the list, and the serial numbers will automatically update to reflect the new sequence.

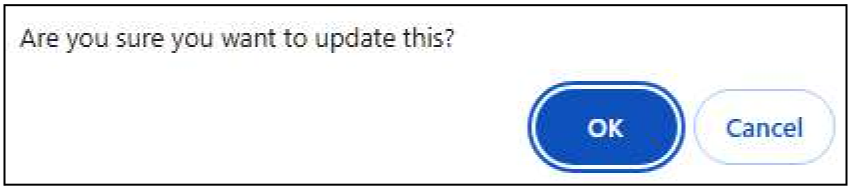
The spoken language will appear in the same order across all lists, including the spoken languages list, teacher's profile, and the filter on the teacher's listing page.

- **Sr. No:** The serial number.
- **Identifier:** The spoken language's system identifier, used to save data in the system and not displayed anywhere on the platform.
- **Name:** The spoken language's name which will appear across all lists on the platform.
- **Status:** Edit the status (activate or deactivate) of a spoken language as per your requirements using the toggle switch beside it, under the status column.

Turn **on** the toggle switch beside the spoken language to activate it.

Leave this **off** or turn it **off** to deactivate the spoken language.

A warning dialog box will appear for both actions, asking if you want to update the status or not.



Click **Ok** to delete it or **Cancel** to abort the action.

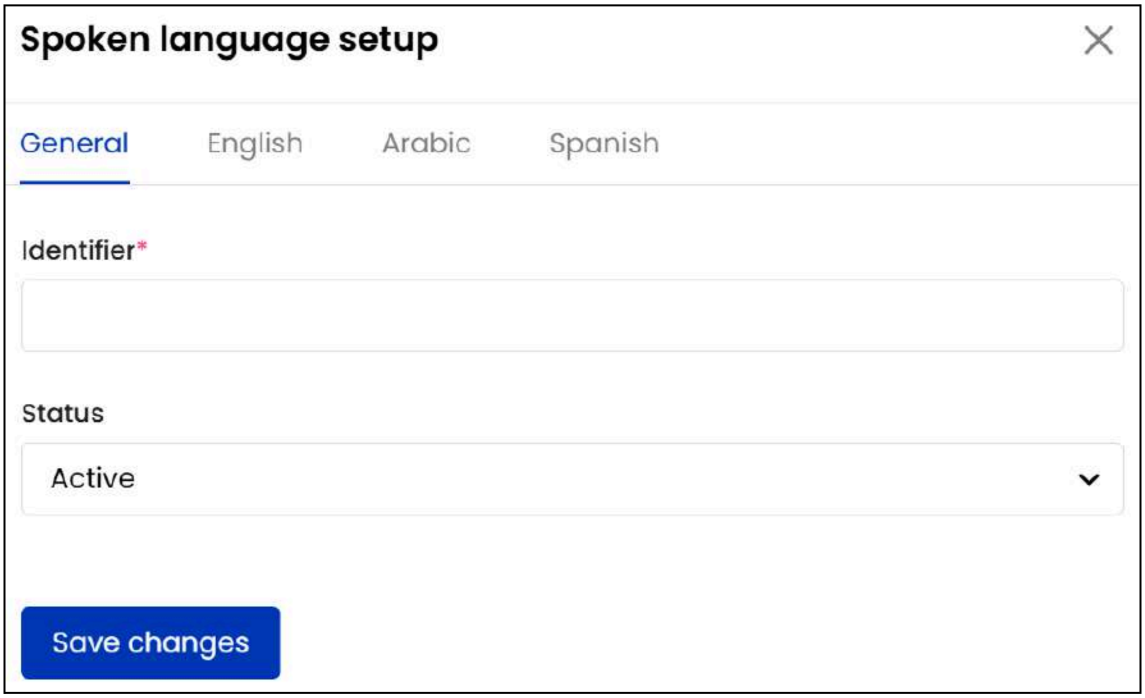
When you deactivate a spoken language, teachers who have selected ONLY that spoken language will no longer be visible on the teacher listing pages.

Add a spoken language

Click 

in the upper-right corner of the page to open the **Spoken language setup** form.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.



This form contains multiple tabs: the [General]() tab, followed by the [Primary language]() tab.

After that, you'll find the [Secondary language]() tabs, corresponding to the languages available on your platform.

Let's start with the **General tab**.

General tab

Update the following:

- **Identifier*:** Enter a unique spoken language identifier.

  It can match the spoken language name, as defined under the Language data tabs (e.g., English, Arabic, Spanish).

  The identifier is used to save data in the system and will not be displayed anywhere on the platform. Ensure the identifier is unique; otherwise, an error message will appear.

Once done, click **Save changes**.

This will direct you to the next tab, which is the primary language tab (English tab).

English tab

This is the primary language tab, and completing this tab is mandatory for publishing the spoken language on the platform.

Since English is set as the primary language, this tab is labeled **English**.

Update the following:

- **Name*:** Enter the spoken language name in the primary language.

  This name will be visible across all lists, including the spoken languages list, teacher's profile, and the filter on the teacher's listing page.

- **Auto-translate into other languages:** Check mark this to automatically update the secondary language(s) data. The data in the subsequent language tab(s) will be auto-filled.

  *This feature is available only if the Microsoft text translator API is configured under **Settings > System configurations >** Third-party APIs.*

  If you prefer to manually fill in the secondary language(s) data, leave the checkbox unselected.

Once done, click **Save changes**.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

The next tab(s) will be the secondary language tab(s) (Arabic, Spanish, etc.), which include the same fields as the English tab.

Edit the details as needed and save.

*If you had selected the auto-translate option, the secondary language tab(s) will be prefilled. Review the data, make any necessary edits, click **Save changes**, and close the form.*

*If you did not use the auto-translate feature earlier, use the **Auto-translate & fill language data** button beside the **Save changes** button on each secondary language tab to auto-fill the secondary language fields. Then, click **Save changes**, and move to the next tab, or close the form.*

*If you do not want to fill the secondary language tab(s) at this time, complete only the primary language tab (English tab), click **Save changes**, and close the form.*

After updating all necessary fields, click  in the upper-right corner of the form.

The spoken language will then be added to the list.

Action buttons

Under the **Action** column, each entry includes two action buttons, allowing you to perform specific actions.

The functions of each button are explained in detail below:

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

i. Edit

Click this to edit the test preparation option's details. The [Spoken language setup] form will appear.

Update the fields, then click **Save changes**. To close the form, click in the upper-right corner.

ii. Delete

Click this to delete the spoken language from the system. A confirmation message will appear.

Click **OK** to confirm the action or **Cancel** to abort it.

When you delete a spoken language, teachers who have selected ONLY that spoken language will no longer be visible on the teacher listing pages.

Export spoken languages data

To export the spoken languages data from this page, click **Export** from the upper-right corner.

The data will be downloaded as a `.csv` file (Comma-Separated Values), which can be used for backups or external purposes.

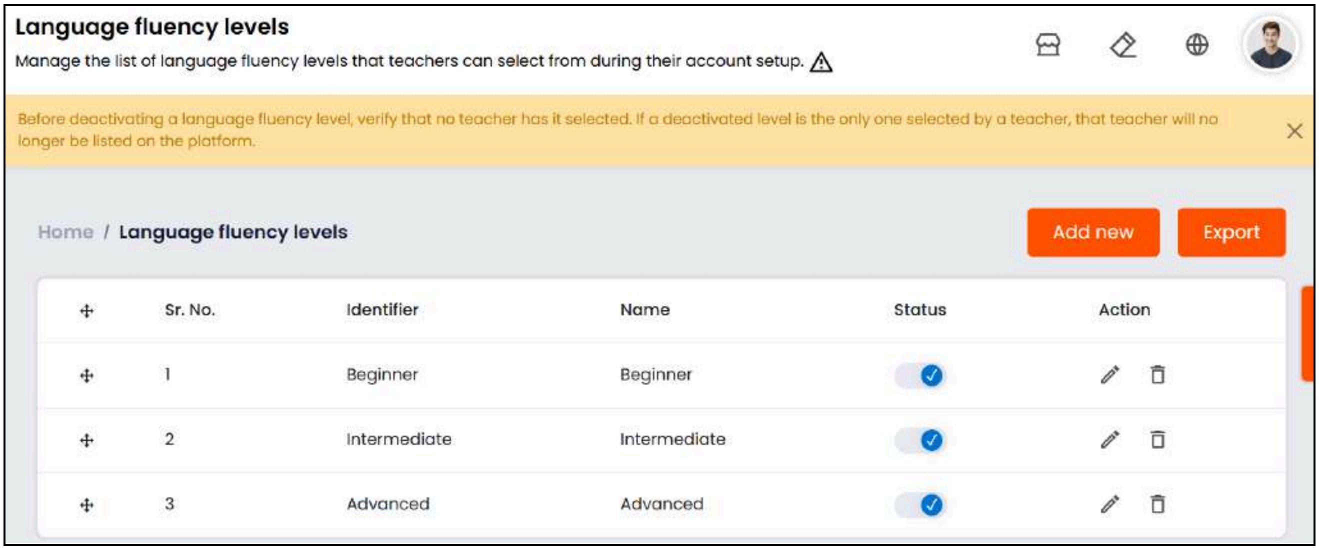
A success message will appear once the download is complete.

<u>**DISCLAIMER:**</u> The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

9.7 Language fluency levels

Every new teacher registering on the platform must select how fluently they speak the selected [spoken language]() from a predefined list during their account creation. The selected language fluency level appears on the respective teacher's profile, helping learners find the right match.

Use this submodule to define the list of language fluency levels that the teachers can choose from on the platform.



The list will be empty if you recently purchased the platform and chose not to include dummy content provided by FATbit during installation.

Manage the language fluency levels list

Each entry in the list includes the following details and provides options for management including:

- **Drag-and-drop ✥ :** Click this next to a language fluency level to move it up or down the list, and the serial numbers will automatically update to reflect the new sequence.

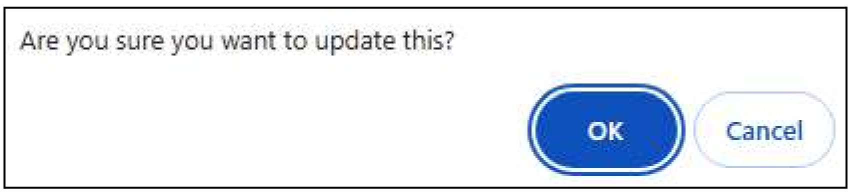
  The language fluency level will appear in the same order across all lists, including the language fluency levels list, teacher's profile, and the filter on the teacher's listing page.

- **Sr. No:** The serial number.
- **Identifier:** The language fluency level's system identifier, used to save data in the system and not displayed anywhere on the platform.
- **Name:** The language fluency level's name which will appear across all lists on the platform.
- **Status:** Edit the status (activate or deactivate) of a language fluency level as per your requirements using the toggle switch beside it, under the status column.

Turn **on**  the toggle switch beside the language fluency level to activate it.

Leave this **off** or turn it **off** to deactivate the language fluency level.

A warning dialog box will appear for both actions, asking if you want to update the status or not.



Click **Ok** to delete it or **Cancel** to abort the action.

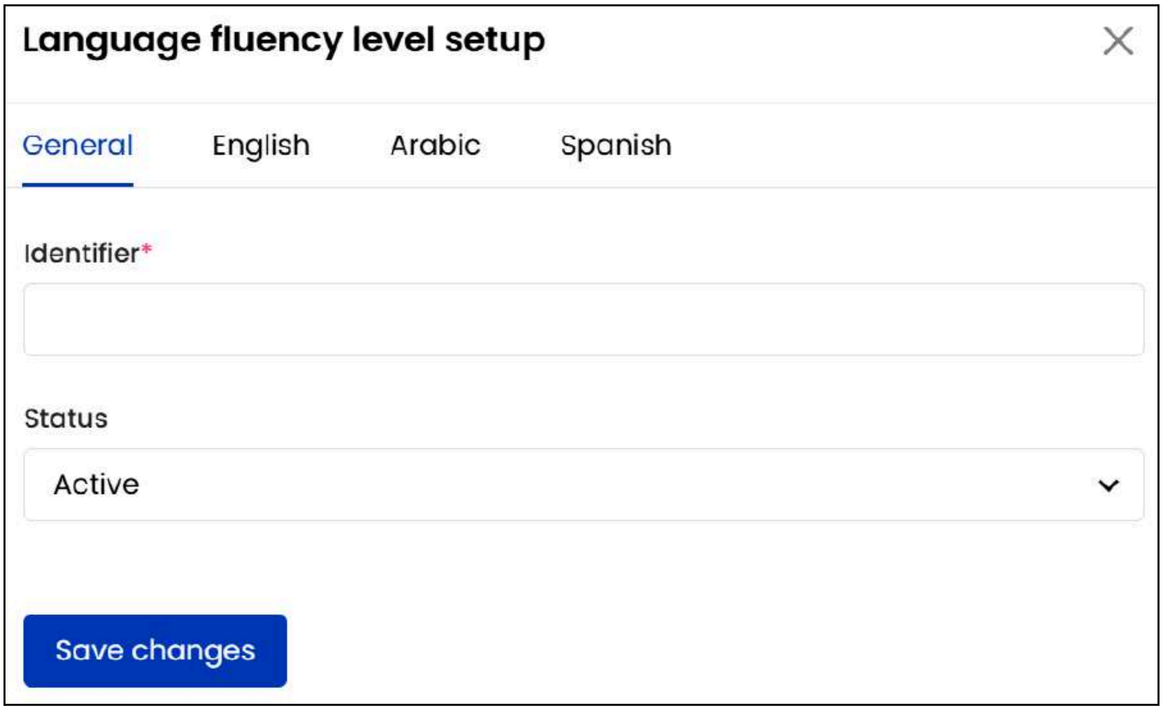
When you deactivate a language fluency level, teachers who have selected ONLY that language fluency level will no longer be visible on the teacher listing pages.

Add a language fluency level

Click 

in the upper-right corner of the page to open the **Language fluency level setup** form.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.



This form contains multiple tabs: the General tab, followed by the Primary language tab.

After that, you'll find the Secondary language tabs, corresponding to the languages available on your platform.

Let's start with the **General tab**.

General tab

Update the following:

- **Identifier*:** Enter a unique language fluency level identifier.

  It can match the spoken language name, as defined under the Language data tabs (e.g., English, Arabic, Spanish).

  The identifier is used to save data in the system and will not be displayed anywhere on the platform. Ensure the identifier is unique; otherwise, an error message will appear.

Once done, click **Save changes**.

This will direct you to the next tab, which is the primary language tab (English tab).

English tab

This is the primary language tab, and completing this tab is mandatory for publishing the language fluency level on the platform.

Since English is set as the primary language, this tab is labeled **English**.

Update the following:

- **Name*:** Enter the language fluency level name in the primary language.

  This name will be visible across all lists, including the spoken languages list, and the teacher's profile.

- **Auto-translate into other languages:** Check mark this to automatically update the secondary language(s) data. The data in the subsequent language tab(s) will be auto-filled.

  This feature is available only if the [Microsoft text translator API] is configured under ***Settings > System configurations >*** *[Third-party APIs].*

  If you prefer to manually fill in the secondary language(s) data, leave the checkbox unselected.

Once done, click **Save changes**.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

The next tab(s) will be the secondary language tab(s) (Arabic, Spanish, etc.), which include the same fields as the English tab.

Edit the details as needed and save.

*If you had selected the auto-translate option, the secondary language tab(s) will be prefilled. Review the data, make any necessary edits, click **Save changes**, and close the form.*

*If you did not use the auto-translate feature earlier, use the **Auto-translate & fill language data** button beside the **Save changes** button on each secondary language tab to auto-fill the secondary language fields. Then, click **Save changes**, and move to the next tab, or close the form.*

*If you do not want to fill the secondary language tab(s) at this time, complete only the primary language tab (English tab), click **Save changes**, and close the form.*

After updating all necessary fields, click in the upper-right corner of the form. The language fluency level will then be added to the list.

Action buttons

Under the **Action** column, each entry includes two action buttons, allowing you to perform specific actions.

The functions of each button are explained in detail below:

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

i. Edit

Click this to edit the language fluency level's details. The [Language fluency level setup] form will appear.

Update the fields, then click **Save changes**. To close the form, click in the upper-right corner.

ii. Delete

Click this to delete the language fluency level from the system. A confirmation message will appear.

Click **OK** to confirm the action or **Cancel** to abort it.

When you delete a language fluency level, teachers who have selected ONLY that language fluency level will no longer be visible on the teacher listing pages.

Export language fluency levels data

To export the language fluency levels data from this page, click **Export** from the upper-right corner.

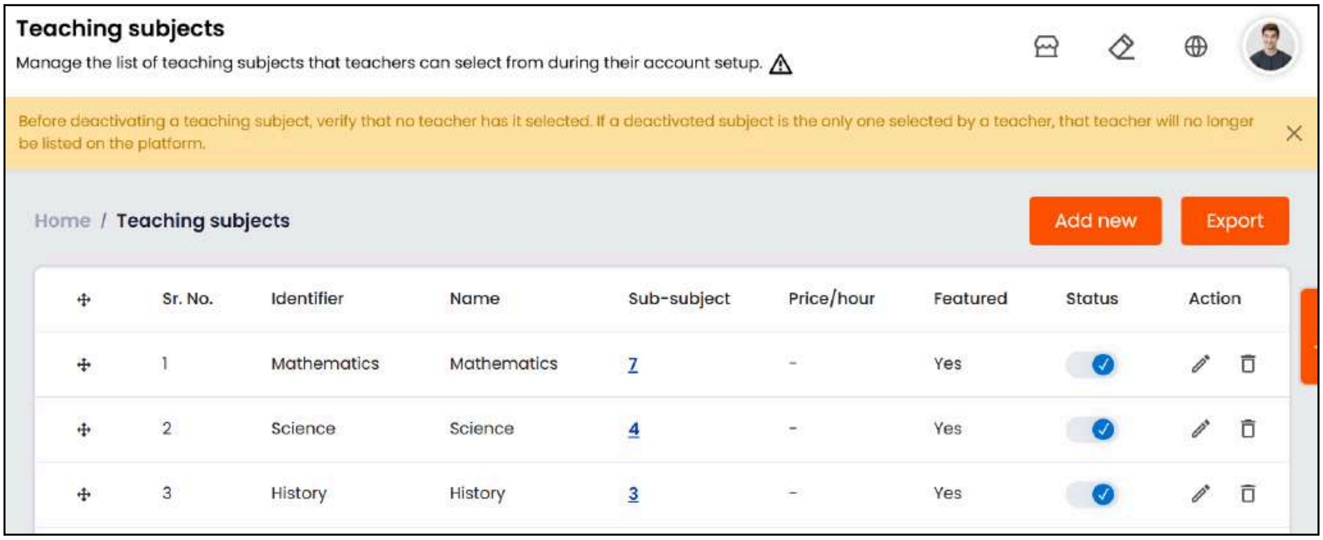
The data will be downloaded as a `.csv` file (Comma-Separated Values), which can be used for backups or external purposes.

A success message will appear once the download is complete.

9.8 Teaching subjects

Every new teacher registering on the platform must select the subject(s) they will be offering from a predefined list during their account creation. The selected subject(s) appears on the respective teacher's profile, helping learners find the right match.

Use this submodule to define the list of subjects that the teachers can choose from on the platform.



The list will be empty if you recently purchased the platform and chose not to include dummy content provided by FATbit during installation.

These subjects also serve as filters on the teacher listing page, helping learners find teachers who match their preferences.

Manage the teaching subjects list

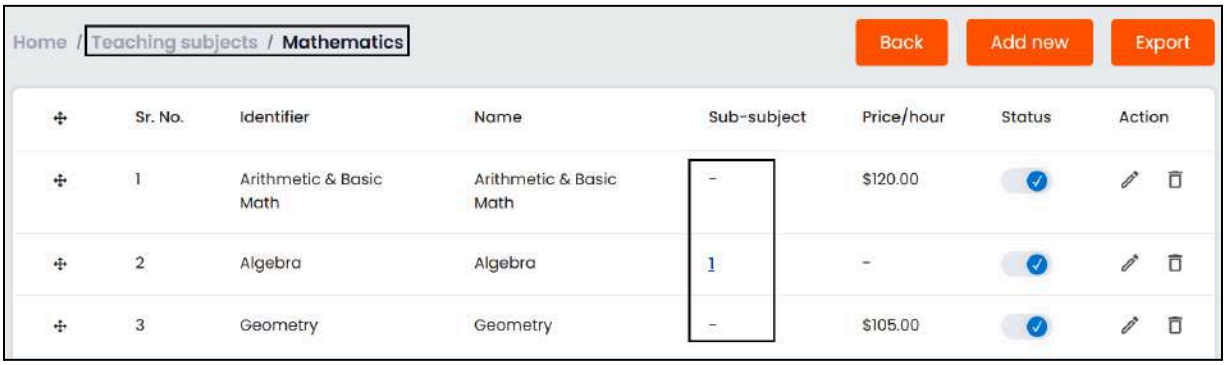
Each entry in the list includes the following details and provides options for management including:

- **Drag-and-drop :** Click this next to a subject to move it up or down the list, and the serial numbers will automatically update to reflect the new sequence.

  The subject will appear in the same order across all lists, including the subjects list, teacher's profile, and the filter on the teacher's listing page.

<u>**DISCLAIMER:**</u> The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

- **Sr. No:** The serial number.
- **Identifier:** The subject's system identifier, used to save data in the system and not displayed anywhere on the platform.
- **Name:** The subject's name which will appear across all lists on the platform.
- **Sub-subject:** The number of sub-subjects under a subject or sub-subject is displayed as a clickable value. Clicking it opens the list of sub-subjects within the respective subject.



Sub-subjects can have their own nested sub-subjects, continuing until a sub-subject has no further subdivisions.

Each sub-subject page displays the same information (except for the featured column) and allows the same actions as the main subjects page.

If a subject or sub-subject has no sub-subjects, a dash (-) is displayed instead of a number.

*As the admin, you must select who will manage lesson pricing for subjects during the initial setup. This selection can only be made once and cannot be changed later in **Settings > System configurations > System**.*

The next column(s) in the list will vary based on the selected pricing management option:

Case 1: For admin manageable pricing, the following column is displayed:

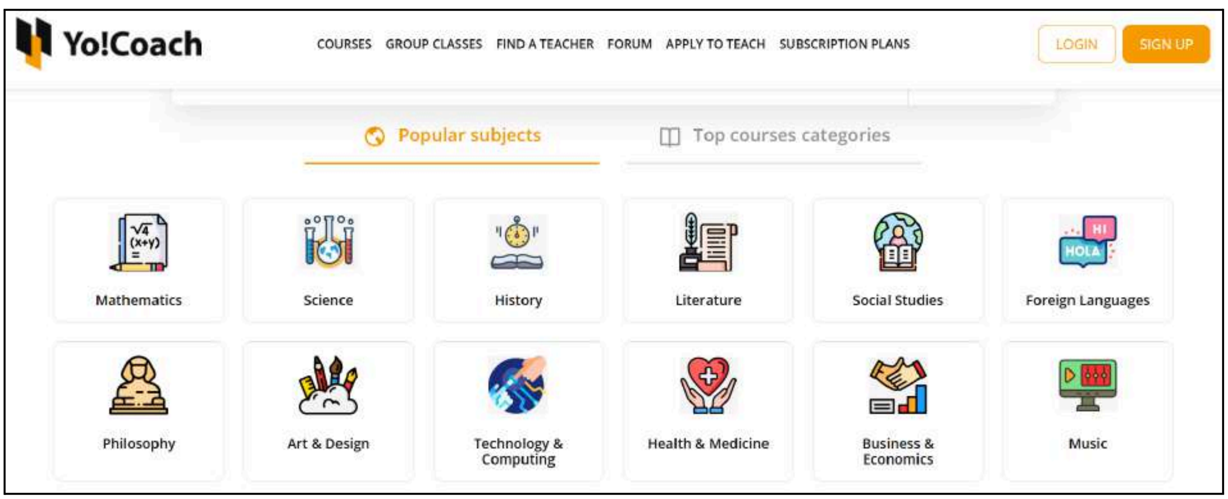
- **Price/hour:** The hourly price set for lessons in the respective subject.

  If a subject or sub-subject has nested sub-subjects, no price will be assigned, and a dash (-) will be displayed instead.

Case 2: For teacher manageable pricing, the following columns are displayed:

- **Min price/hour:** The lowest hourly price that a teacher can charge for the respective subject.
- **Max price/hour:** The highest hourly price that a teacher can charge for the respective subject.
- **Featured:** This defines if the subject is marked as a featured subject. “Yes” means it is featured, and “No” means it is not.

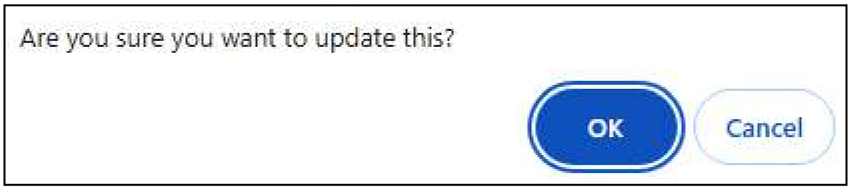
  Only main subjects can be marked as featured. Featured subjects appear on the front-end homepage under the **Popular subjects** section, as shown in the image below.



- **Status:** Edit the status (activate or deactivate) of a subject as per your requirements using the toggle switch beside it, under the status column.

  Turn **on**  the toggle switch beside the subject to activate it. Leave this **off** or turn it **off** to deactivate the subject.

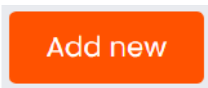
  A warning dialog box will appear for both actions, asking if you want to update the status or not.



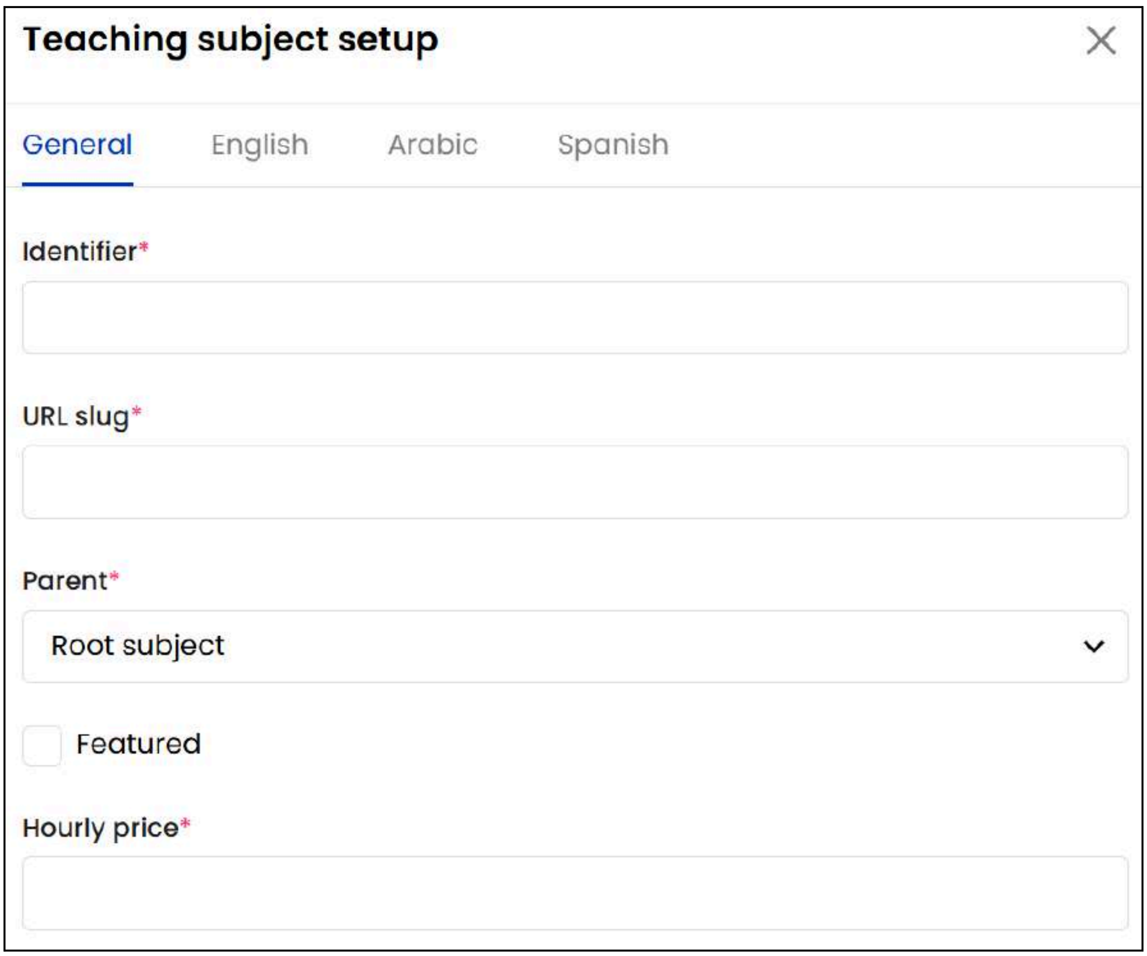
Click **Ok** to delete it or **Cancel** to abort the action.

When you deactivate a subject, teachers who have selected ONLY that subject will no longer be visible on the teacher listing pages.

Add a teaching subject

Click 

in the upper-right corner of the page to open the **Teaching subject setup** form.



<u>**DISCLAIMER:**</u> The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

This form contains multiple tabs: the General tab, followed by the Primary language tab.

After that, you'll find the Secondary language tabs, corresponding to the languages available on your platform. The last tab is the Media tab.

Let's start with the **General tab**.

General tab

Update the following:

- **Identifier*:** Enter a unique subject identifier.

  It can match the subject name, as defined under the Language data tabs (e.g., English, Arabic, Spanish).

  The identifier is used to save data in the system and will not be displayed anywhere on the platform. Ensure the identifier is unique; otherwise, an error message will appear.

- **URL slug*:** Enter the URL slug for the respective subject.

  A slug is the part of a URL that identifies a particular page on a website. For instance, if the website is yo-coach.com/maths, the slug is maths. You need to enter this part of the URL in this field.

- **Parent:** Select if the subject is the main subject or the sub-subject. To do this, click the field and a dropdown list will appear.

  Select "**root subject**" from the list if the subject is a parent subject (main subject). If the subject is a sub-subject (child subject), select the subject it will fall under.

- **Featured:** Select this checkbox to mark the subject as a featured subject.

  This setting is only available for main subjects and does not appear if the subject is a sub-subject.

The next field(s) in the list will vary based on the selected pricing management option under **Settings > System configurations >** System**:**

Case 1: For admin manageable pricing, the following field is displayed:

- **Price/hour:** Enter the hourly price that teachers will earn by offering lessons for the respective subject.

Case 2: For teacher manageable pricing, the following fields are displayed:

- **Min price/hour:** Enter the lowest hourly price that a teacher can charge for the respective subject.
- **Max price/hour:** Enter the highest hourly price that a teacher can charge for the respective subject.

Once a sub-subject is added under a subject, the pricing fields will no longer be applicable and will not be visible when editing the subject.

- **Status:** Select the status of the subject.

  To do this, click the field and select "**active**" to mark the subject as active and publish it on the platform, so that teachers can choose it when setting up their profile.

  Select "**inactive**" to hide the subject for the time being, on the platform. In this case, teachers will not be able to choose this subject when setting up their profile.

Once done, click **Save changes**.

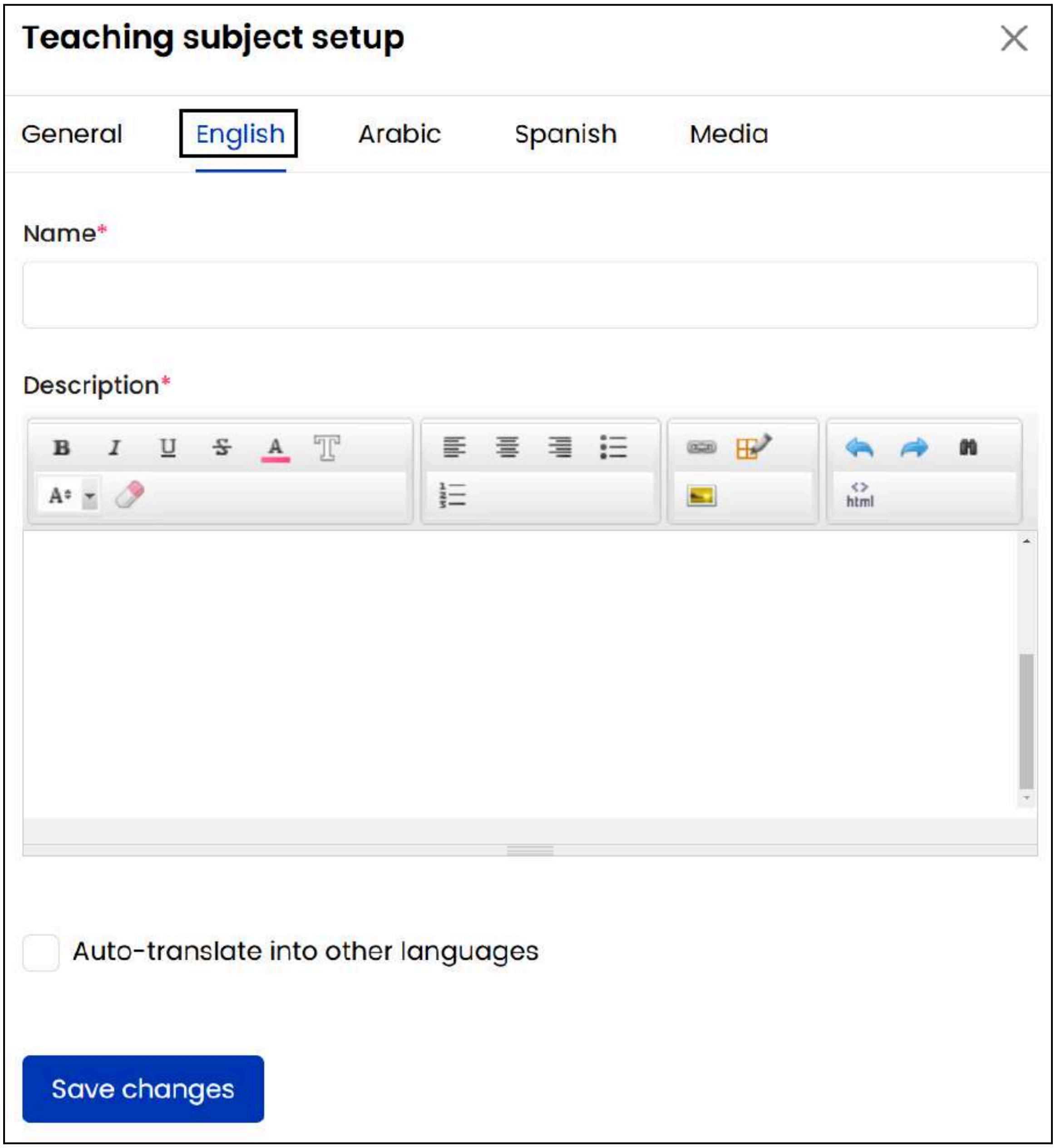
This will direct you to the next tab, which is the primary language tab (English tab).

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

English tab

This is the primary language tab, and completing this tab is mandatory for publishing the teaching subject on the platform.

Since English is set as the primary language, this tab is labeled **English**.



Update the following:

- **Name*:** Enter the subject name in the primary language.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

This name will be visible across all lists, including the subjects list, teacher's profile, and the filter on the teacher's listing page.

- **Description*:** Enter a description for the subject in the primary language. This is used for SEO purposes and is **not displayed on the platform.**
- **Auto-translate into other languages:** Check mark this to automatically update the secondary language(s) data.

  The data in the subsequent language tab(s) will be auto-filled.

  *This feature is available only if the Microsoft text translator API is configured under **Settings > System configurations >** Third-party APIs.*

  If you prefer to manually fill in the secondary language(s) data, leave the checkbox unselected.

Once done, click **Save changes**.

The next tab(s) will be the secondary language tab(s) (Arabic, Spanish, etc.), which include the same fields as the English tab.

Edit the details as needed and save.

*If you had selected the auto-translate option, the secondary language tab(s) will be prefilled. Review the data, make any necessary edits, click **Save changes**, and move to the Media tab.*

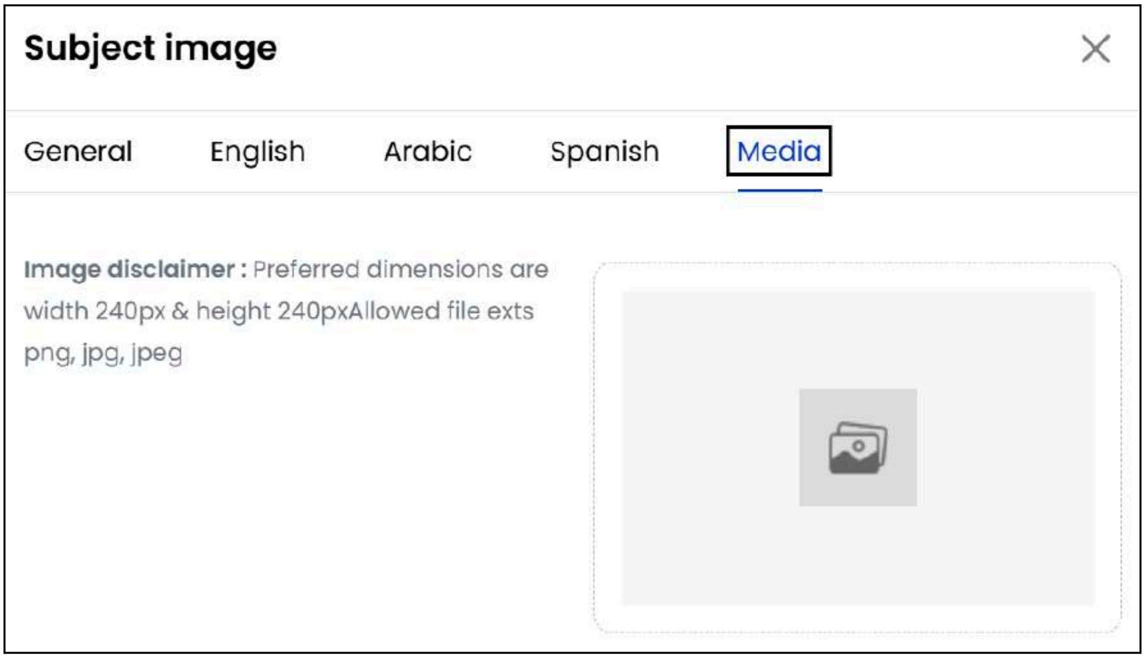
*If you did not use the auto-translate feature earlier, use the **Auto-translate & fill language data** button beside the **Save changes** button on each secondary language tab to auto-fill the secondary language fields. Then, click **Save changes**, and move to the next tab.*

*If you do not want to fill the secondary language tab(s) at this time, complete only the primary language tab (English tab), click **Save changes**, and move to the Media tab.*

Media tab

The final tab, following all the secondary language tabs, is the **Media** tab.

Click this tab to access it, and update the subject's icon image.



To upload it, hover over the image field.

Click . Select the image from your system, click **Open** and it will be uploaded.

After uploading the image, hovering over the image field reveals two buttons.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

To edit the image again (change it), hover over the image field, click , select the image from your system and upload it.

To delete the image, hover over the image field and click .

*When you upload the image, it is saved automatically in the system, so no **Save changes** button is provided under this tab.*

After completing the process, click to close the form. The subject will then be added to the list.

Action buttons

Under the **Action** column, each entry includes two action buttons, allowing you to perform specific actions.

The functions of each button are explained in detail below:

i. Edit

Click this to edit the teaching subject's details. The Teaching subject setup form will appear.

Update the fields, then click **Save changes**.

To close the form, click in the upper-right corner.

ii. Delete

Click this to delete the teaching subject from the system.

A confirmation message will appear.

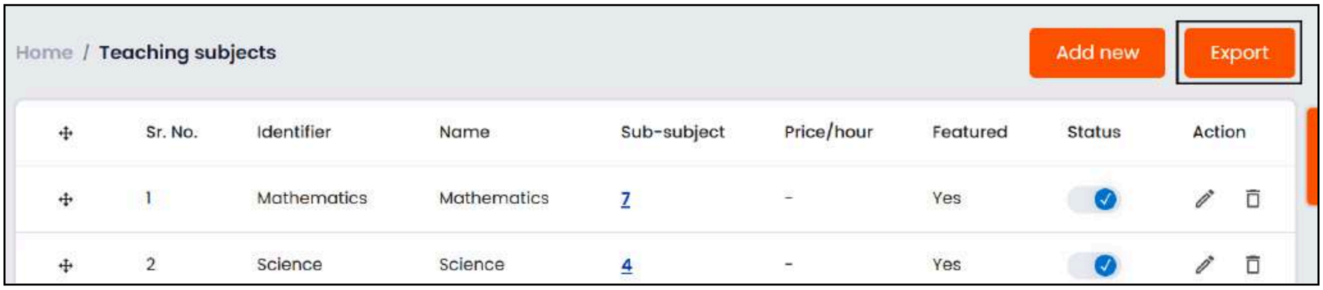
DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

Click **OK** to confirm the action or **Cancel** to abort it.

When you delete a subject, teachers who have selected ONLY that subject will no longer be visible on the teacher listing pages.

Export teaching subjects data

To export the teaching subjects data from this page, click **Export** from the upper-right corner.



The data will be downloaded as a `.csv` file (Comma-Separated Values), which can be used for backups or external purposes.

A success message will appear once the download is complete.

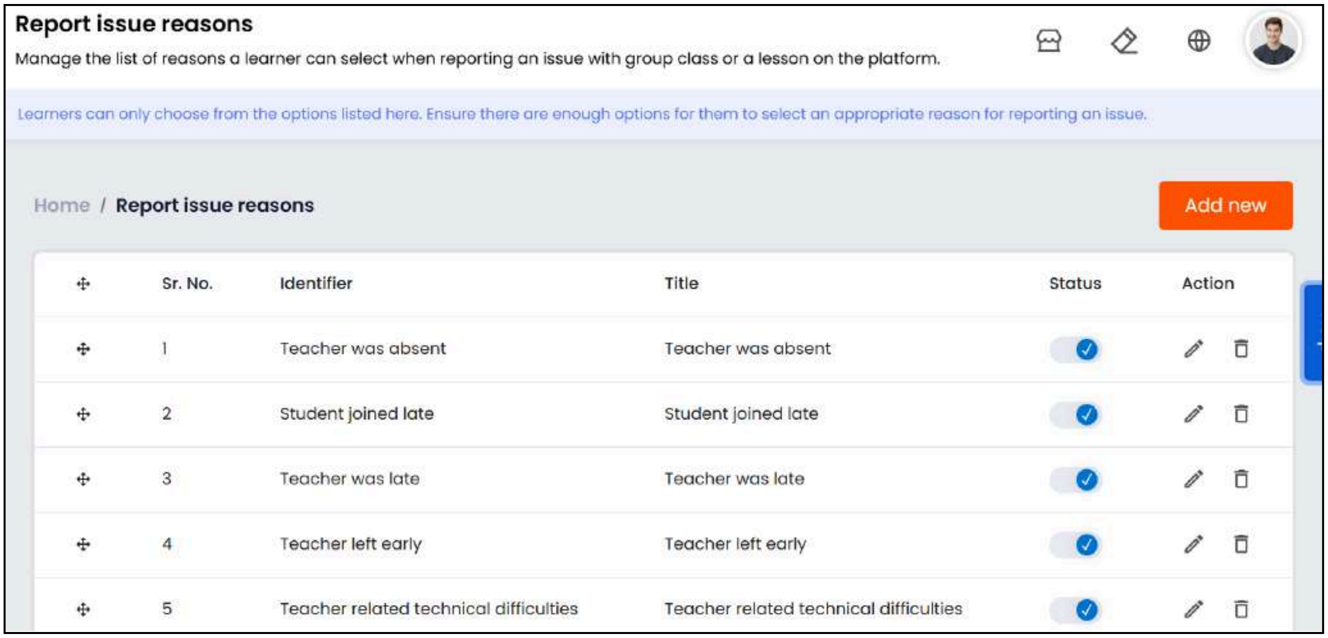
DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

9.9 Report issue reasons

Learners can report an issue with a group class or a lesson if they were not satisfied or encountered a problem during the session. Reporting an issue allows the teacher to review the concern and provide a resolution, which may include offering the session again, issuing a full refund, a half refund, a partial refund, or no refund.

To report an issue, learners must select a predefined reason from a list and provide a comment. They cannot create their own issue reasons or report an issue if the relevant option is not available in the predefined list. Refer to the How "reporting an issue" works section for more details on how learners can report an issue on the platform.

The predefined list of report issue reasons is set by you under this submodule.



The list will be empty if you recently purchased the platform and chose not to include dummy content provided by FATbit during installation.

Manage the report issue reasons list

Each entry in the list includes the following details and provides options for management including:

<u>**DISCLAIMER:**</u> The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

- **Drag-and-drop :** Click this next to a report issue reason to move it up or down the list, and the serial numbers will automatically update to reflect the new sequence.

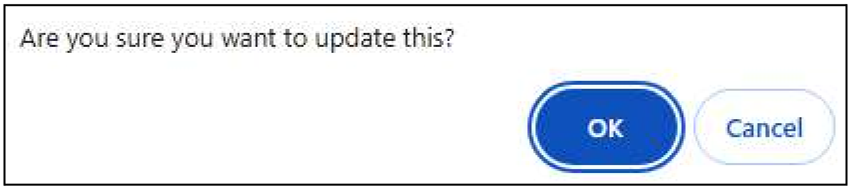
  The report issue reason will appear in the same order in the report issue reasons list.

- **Sr. No.:** The serial number.
- **Identifier:** The report issue reason's system identifier, used to save data in the system and not displayed anywhere on the platform.
- **Title:** The report issue reason's title which will appear across all lists on the platform.
- **Status:** Edit the status (activate or deactivate) of a report issue reason as per your requirements using the toggle switch beside it, under the status column.

  Turn **on** the toggle switch beside the report issue reason to activate it.

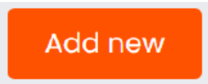
  Leave this **off** or turn it **off** to deactivate the report issue reason.

  A warning dialog box will appear for both actions, asking if you want to update the status or not.



  Click **Ok** to delete it or **Cancel** to abort the action.

Add a report issue reason

Click 

in the upper-right corner of the page to open the **Report issue reason setup** form.

This form contains multiple tabs: the General tab, followed by the Primary language tab.

After that, you'll find the Secondary language tabs, corresponding to the languages available on your platform.

Let's start with the **General tab**.

General tab

Update the following:

- **Identifier*:** Enter a unique report issue reason identifier.

  It can match the report issue reason name, as defined under the Language data tabs (e.g., English, Arabic, Spanish).

  The identifier is used to save data in the system and will not be displayed anywhere on the platform. Ensure the identifier is unique; otherwise, an error message will appear.

- **Status:** Select the status of the report issue reason.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

To do this, click the field and select “**active**” to mark the report issue reason as active and publish it on the platform, so that learners can choose it when reporting an issue.

Select “**inactive**” to hide the report issue reason for the time being, on the platform. In this case, learners will not be able to choose this reason when reporting an issue as it will not be visible in the list.

Once done, click **Save changes**.

This will direct you to the next tab, which is the primary language tab (English tab).

English tab

This is the primary language tab, and completing this tab is mandatory for publishing the report issue reason on the platform.

Since English is set as the primary language, this tab is labeled **English**.

Update the following:

- **Name*:** Enter the report issue reason title in the primary language.

  This title will be visible across on the list of report issue reasons and everywhere else the reported issue is visible on the platform.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

- **Auto-translate into other languages:** Check mark this to automatically update the secondary language(s) data. The data in the subsequent language tab(s) will be auto-filled.

  *This feature is available only if the Microsoft text translator API is configured under **Settings > System configurations >** Third-party APIs.*

  If you prefer to manually fill in the secondary language(s) data, leave the checkbox unselected.

Once done, click **Save changes**.

The next tab(s) will be the secondary language tab(s) (Arabic, Spanish, etc.), which include the same fields as the English tab.

Edit the details as needed and save.

*If you had selected the auto-translate option, the secondary language tab(s) will be prefilled. Review the data, make any necessary edits, click **Save changes**, and close the form.*

*If you did not use the auto-translate feature earlier, use the **Auto-translate & fill language data** button beside the **Save changes** button on each secondary language tab to auto-fill the secondary language fields. Then, click **Save changes**, and move to the next tab, or close the form.*

*If you do not want to fill the secondary language tab(s) at this time, complete only the primary language tab (English tab), click **Save changes**, and close the form.*

After updating all necessary fields, click  in the upper-right corner of the form.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

The report issue reason will then be added to the list.

Action buttons

Under the **Action** column, each entry includes two action buttons, allowing you to perform specific actions.

The functions of each button are explained in detail below:

i. Edit

Click this to edit the report issue reason's details. The Report issue reason setup form will appear.

Update the fields, then click **Save changes**. To close the form, click × in the upper-right corner.

ii. Delete

Click this to delete the report issue reason from the system. A confirmation message will appear.

Click **OK** to confirm the action or **Cancel** to abort it.

10. CMS

CMS is short for Content Management System.

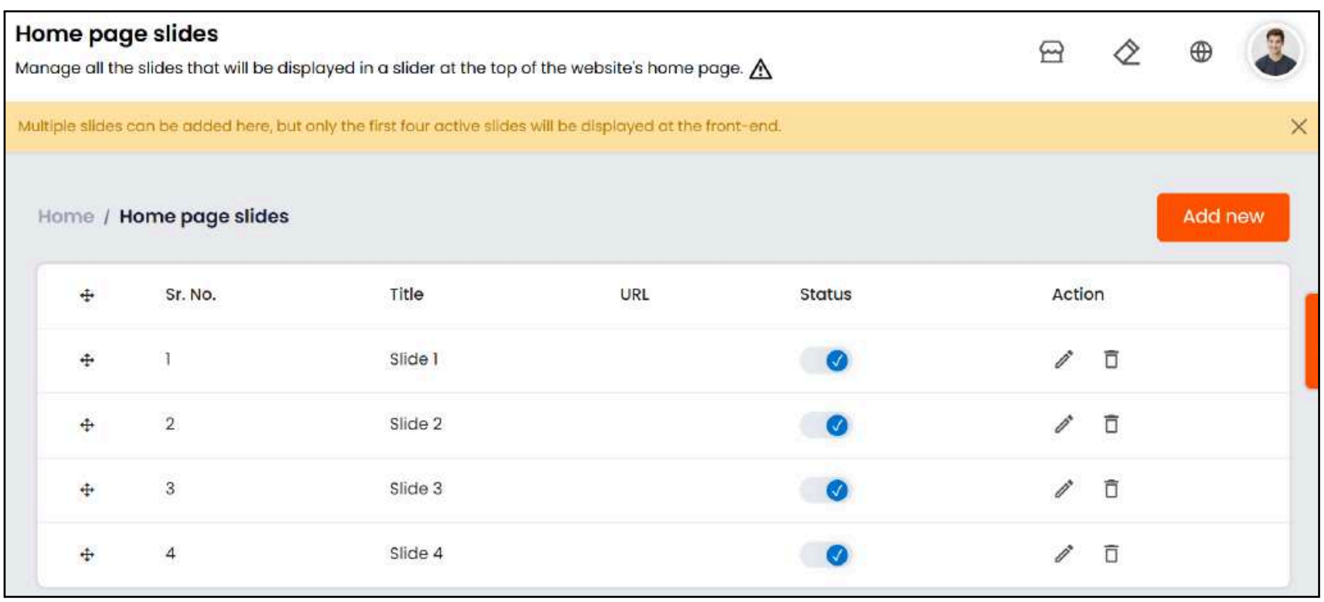
A content management system is used to create, edit, produce, optimize, and manage digital content including web pages, adding images, creating blogs, FAQs, Testimonials, and so on for your website. This, in turn, enhances the customer's experience on the platform.

Yo!Coach allows you to manage all the content displayed at the front end through this module.

Expand this module to view the submodules. Then, click the submodule to visit their respective pages. Each submodule is explained in detail.

10.1 Home page slides

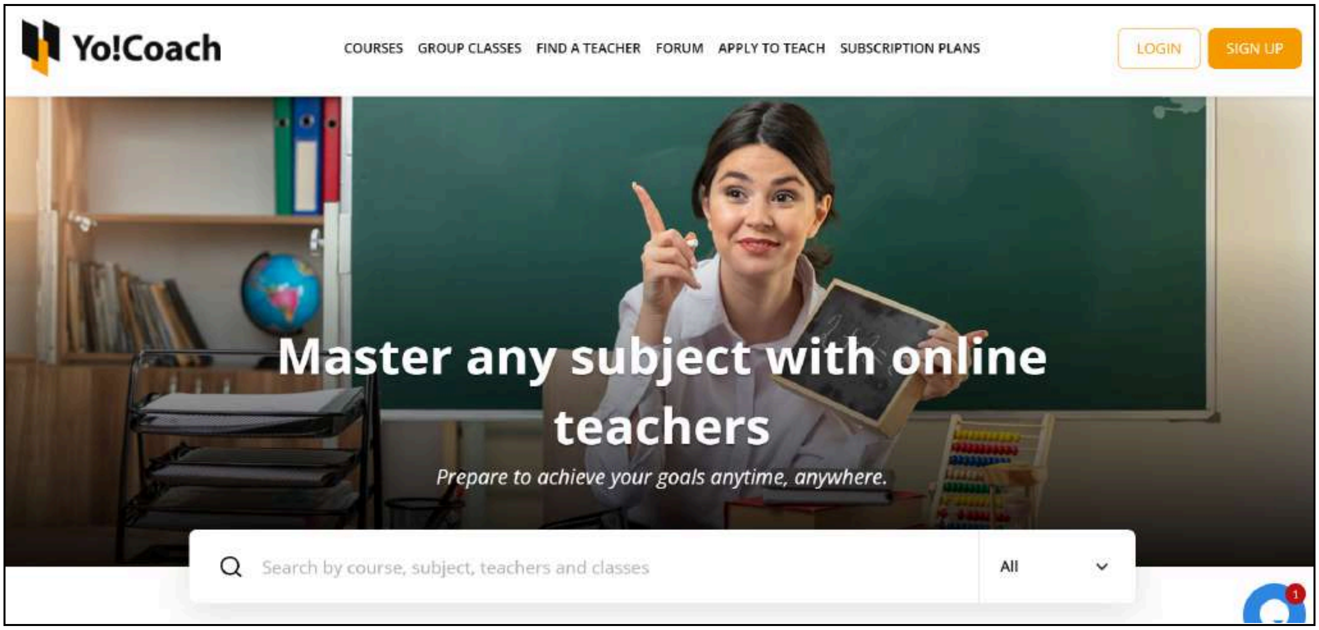
Manage the home page slides displayed on the system's front end through the Home page slides submodule.



The list will be empty if you just bought the platform and didn't choose to have dummy content provided by FATbit during the platform installation.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

All the media slides under this submodule, will appear just below the header section of the home page and typically showcase promotions, featured items, or key offerings of the website.



Points to note

- You can add multiple slides to the list, but only the first four active slides will always be displayed on the front end.
- Use the drag-and-drop button to adjust the sequence, and the slides will appear in the same order on the front end.
- When creating a slide, you can hyperlink it to a specific URL. This allows learners to be directed to the linked page when they click on the slide.

Manage the home page slides list

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

Each entry in the list includes the following details and provides options for management including:

- **Drag-and-drop** **:** Click this next to a slide to move it up or down the list, and the serial numbers will automatically update to reflect the new sequence.

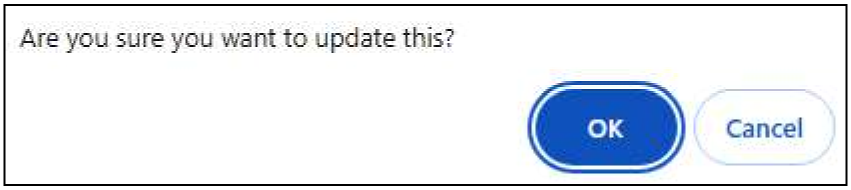
  The slide will appear in the same order at the front end.

- **Sr. No.:** The serial number.
- **Title:** The slide's system identifier, used to save data in the system and not displayed anywhere on the platform.
- **Status:** Edit the status (activate or deactivate) of a slide as per your requirements using the toggle switch beside it, under the status column.

  Turn **on** the toggle switch beside the slide to activate it.

  Leave this **off** or turn it **off** to deactivate the slide.

  A warning dialog box will appear for both actions, asking if you want to update the status or not.



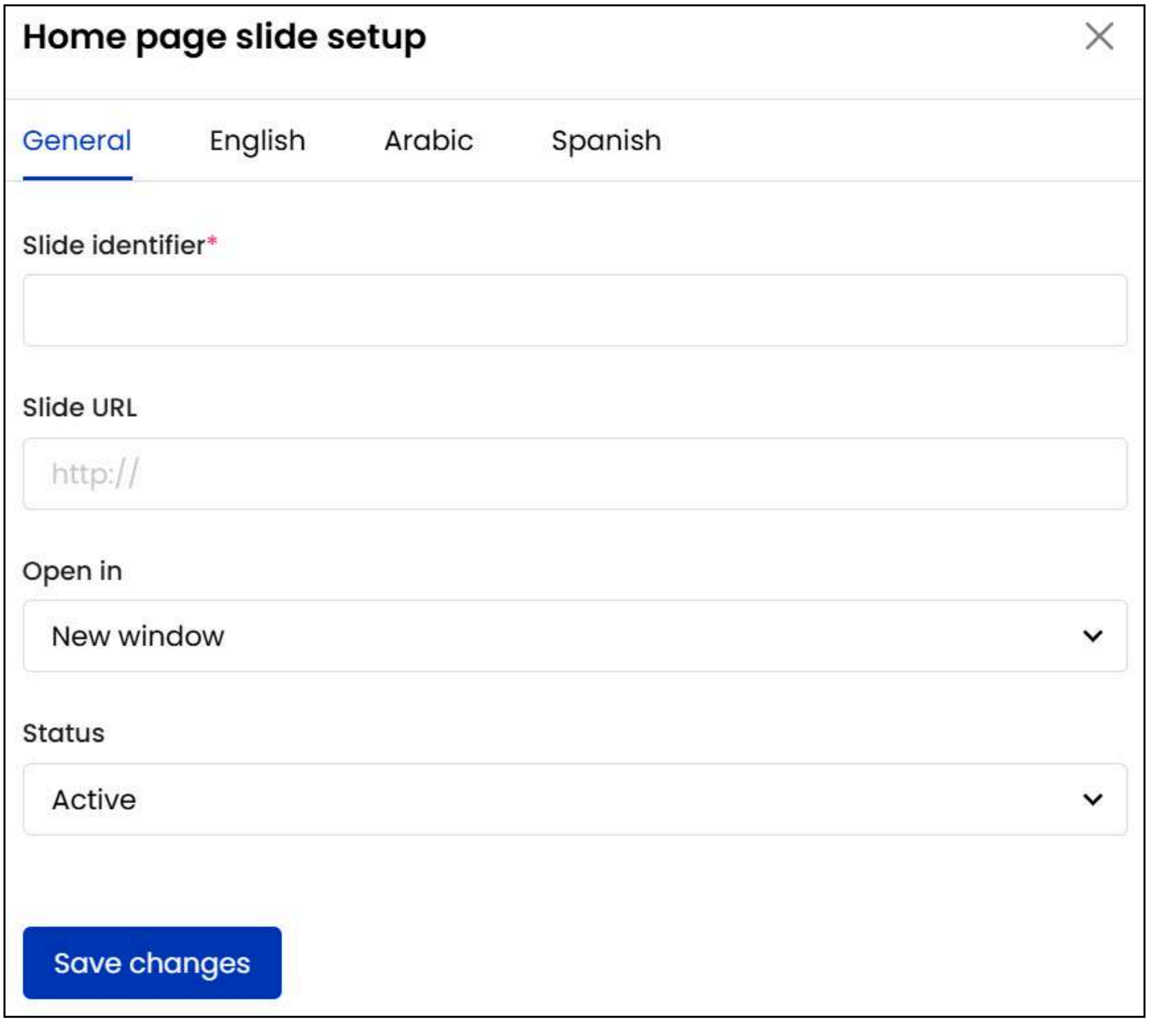
  Click **Ok** to delete it or **Cancel** to abort the action.

Add a home page slide

Click 

in the upper-right corner of the page to open the **Home page slide setup** form.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.



This form contains multiple tabs: the [General](#) tab, followed by the [Primary language](#) tab.

After that, you'll find the [Secondary language](#) tabs, corresponding to the languages available on your platform.

Let's start with the **General tab**.

General tab

Update the following:

- **Slide identifier*:** Enter a unique slide identifier.

  The identifier is used to save data in the system and will not be displayed anywhere on the platform.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

Ensure the identifier is unique; otherwise, an error message will appear.

- **Slide URL:** Add a URL for the slide.

  This is the URL that the user will be directed to when they click this slide.

  Ensure that the URL starts with http:// or https://

- **Open in:** Select where you want the URL to open when clicked. To do this, click the field and a dropdown list appears, with the following options:
  - **Same window:** Select this option if you want the link to open in the same window.
  - **New window:** Select this option if you want the link to open in a new window.

- **Status:** Select the status of the home page slides.

  To do this, click the field and select "**active**" to mark the slide as active and publish it on the platform.

  Select "**inactive**" to hide the slide for the time being from the platform.

Once done, click **Save changes**.

This will direct you to the next tab, which is the primary language tab (English tab).

English tab

Next, upload the slide for each language through its corresponding language tab.

This is the primary language tab, and completing it is mandatory for publishing the slide on the platform, as the image for this language will be uploaded here.

Since English is set as the primary language, this tab is labeled **English**.

Under each language tab, upload device-specific images to enhance the platform's user experience.

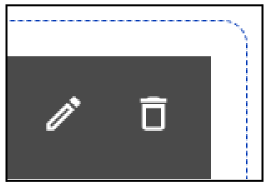
Upload the desktop image, mobile image, and iPad image under this tab (all the fields are the same, and have been named in the form).

To upload an image, hover over the image field.

Click . Select the image from your system, click Open and it will be uploaded.

After uploading the image, hovering over the image field reveals two buttons.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.



To edit the image again (change it), hover over the image field, click , select the image from your system and upload it.

To delete the image, hover over the image field and click .

Once done, click **Update**.

The next tab(s) will be the secondary language tab(s) (Arabic, Spanish, etc.), which include the same fields as the English tab.

Upload images for all the languages, if applicable and then click **Update**.

After updating all necessary fields, click in the upper-right corner of the form.

The slide will then be added to the list.

Action buttons

Under the **Action** column, each entry includes two action buttons, allowing you to perform specific actions.

The functions of each button are explained in detail below:

i. Edit

Click this to edit the slide's details. The Home page slide setup form will appear.

Update the fields, then click **Save changes**. To close the form, click in the upper-right corner.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

ii. Delete

Click this to delete the home page slide from the system. A confirmation message will appear.

Click **OK** to confirm the action or **Cancel** to abort it.

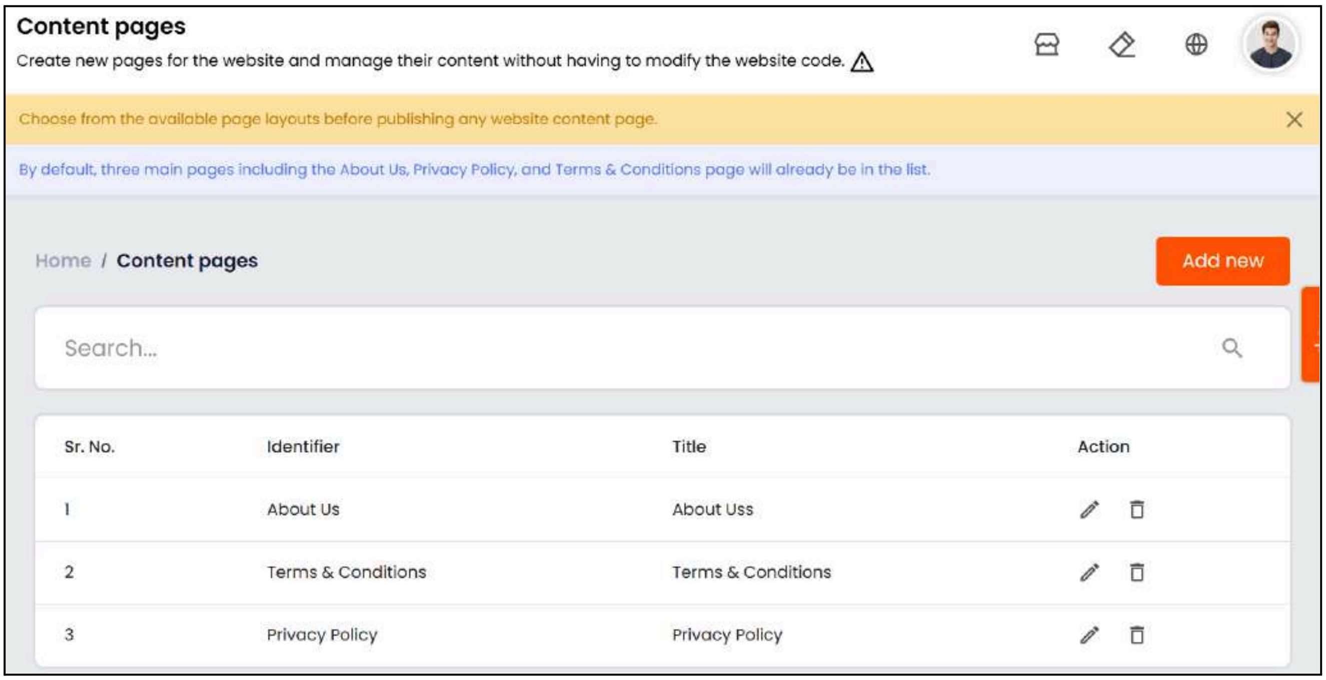
DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

10.2 Content pages

Create, manage, and modify the website's pages and their content without the need for specialized technical knowledge.

By default, three main pages including the About Us page, Privacy Policy Page, and Terms & Conditions page will already be in the list once you purchase the product.

You can easily edit the page content details for these pages, and even create more pages for the website.

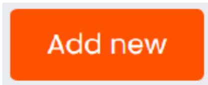


Manage the content pages list

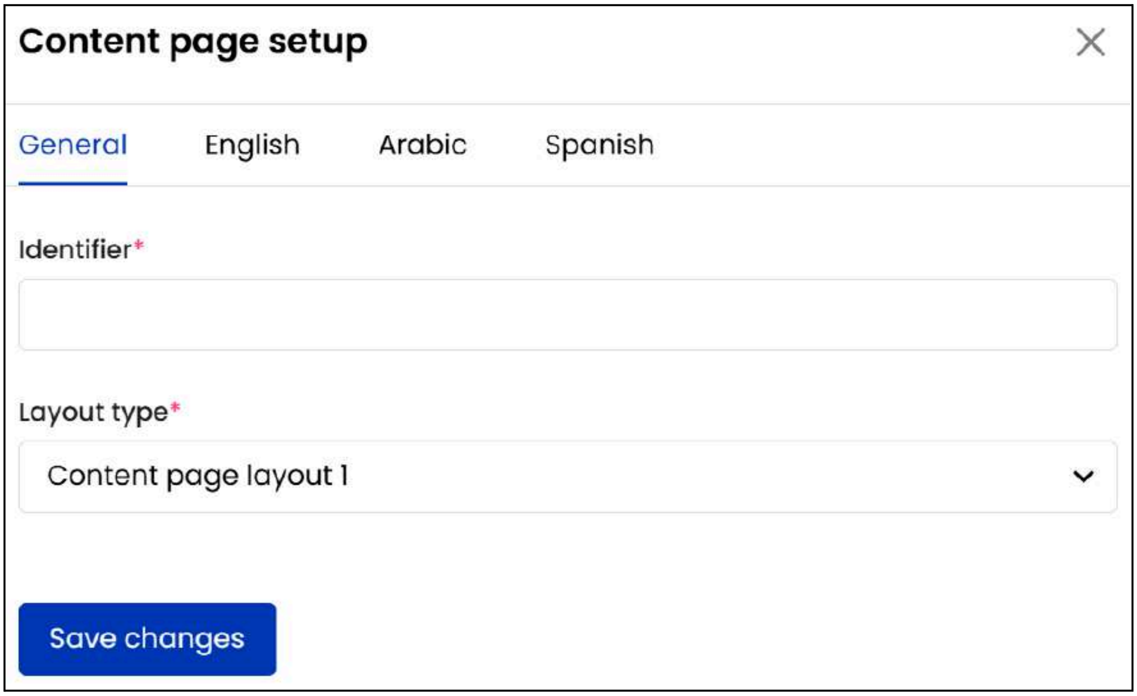
Each entry in the list includes the following details and provides options for management including:

- **Sr. No.:** Serial number
- **Identifier:** The content page's system identifier, used to save data in the system and not displayed anywhere on the platform.
- **Title:** The content page title as displayed on the front end.

Add a content page

Click 

in the upper-right corner of the page to open the **Content page setup** form.



This form contains multiple tabs: the General tab, followed by the Primary language tab. After that, you'll find the Secondary language tabs, corresponding to the languages available on your platform. Let's start with the **General tab**.

General tab

Update the following:

- **Identifier*:** Enter a unique page identifier. It can match the page name, as defined under the Language data tabs (e.g., English, Arabic, Spanish).

  The identifier is used to save data in the system and will not be displayed anywhere on the platform. Ensure the identifier is unique; otherwise, an error message will appear.

- **Layout type*:** Select the layout type that you want. Click the field and select one of the options from the following:

- Content page layout 1
- Content page layout 2

Once done, click **Save changes**.

This will direct you to the next tab, which is the primary language tab (English tab).

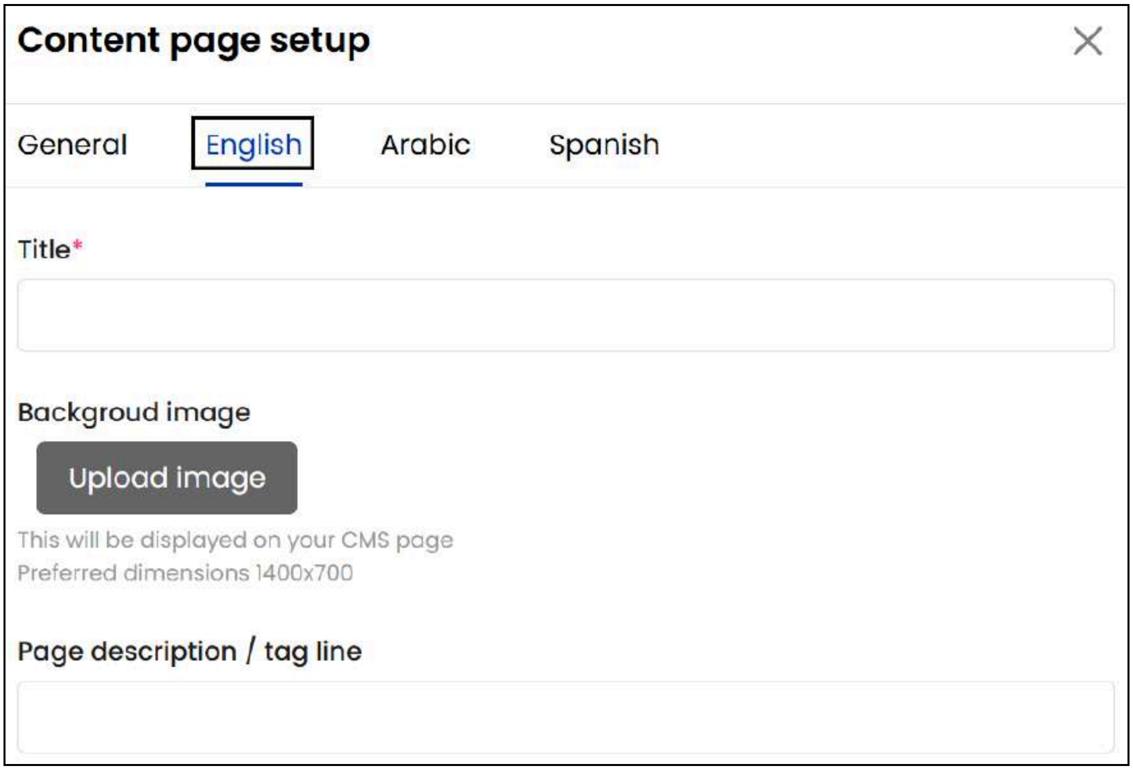
English tab

This is the primary language tab, and completing this tab is mandatory for publishing the content page on the platform. Since English is set as the primary language, this tab is labeled **English**.

Depending on the layout selected in the previous tab, the language data tabs will have different fields.

Each case has been explained below:

Content page layout 1



Update the following fields:

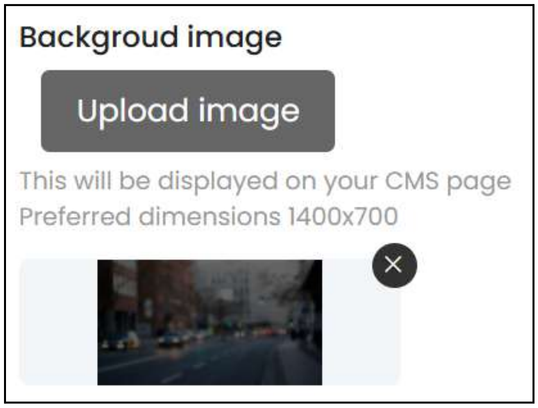
DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

- **Title*:** Enter the page title that will be displayed at the front end as the page's heading.

- **Background image:** Upload the image that will be displayed below the page description or tag line. To do this, click **Upload image**.Select the image from your system, click **Open** and it will be uploaded.

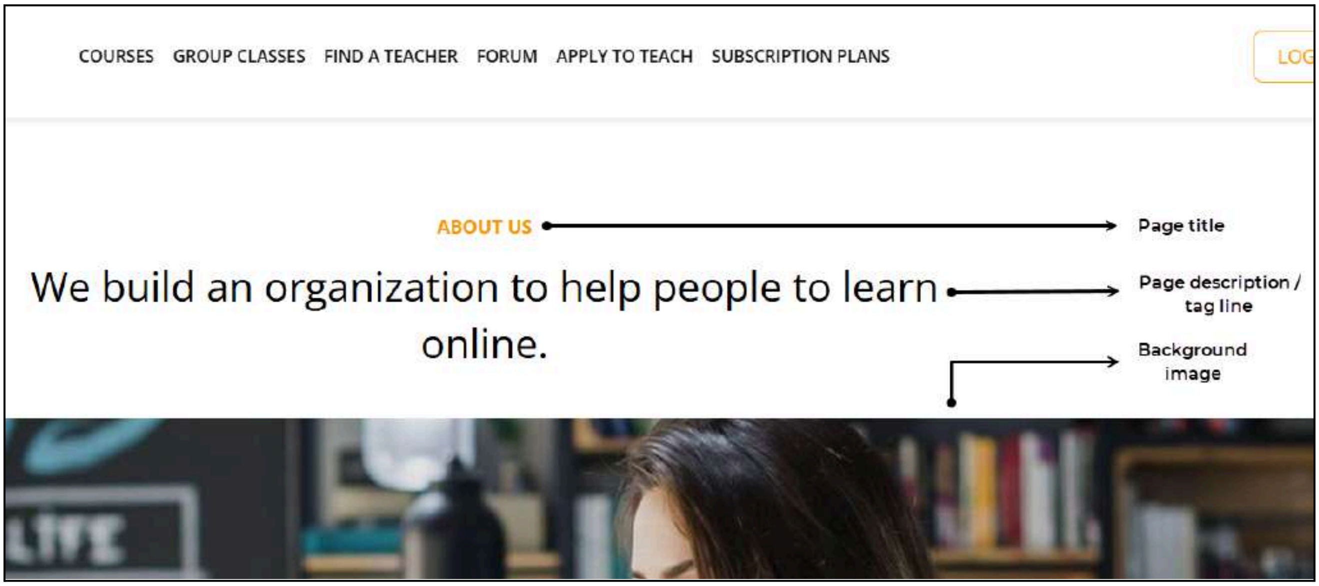
  *Ensure the uploaded image has the correct dimensions. Refer to the note below the **Upload image** button for the required specifications.*

  The uploaded image will appear below the field, as shown in the image below.



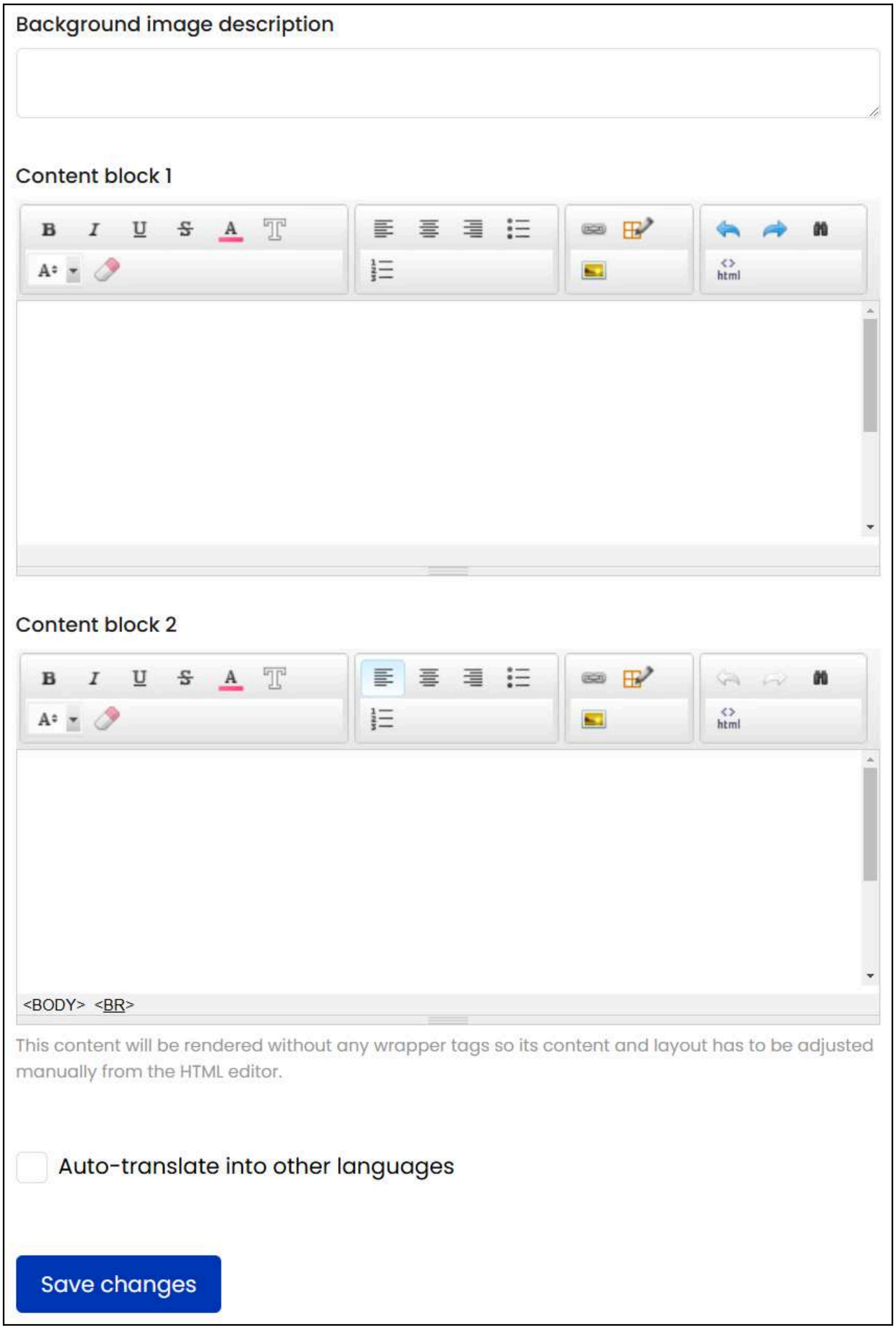
  To delete an image, click located at the upper-right corner of the respective image's section.

- **Page description / tag line** Enter the page description or tag line, which is displayed above the background image uploaded.



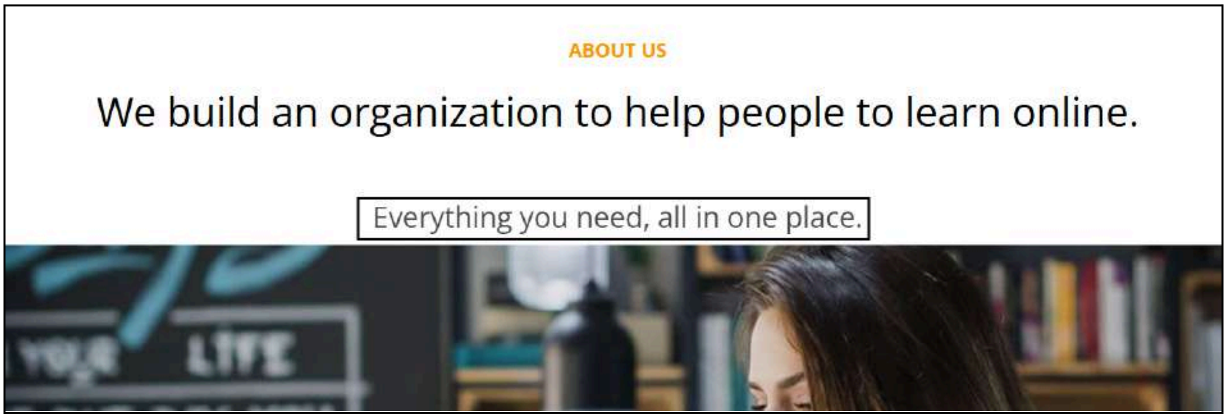
DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

Scroll down to update the rest of the fields:



DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

- **Background image description:** Enter the background image description. This content is displayed right on top of the banner image on the page (as shown below).



- **Content block 1 & 2:** Below the background image description field, there are **2 content block** fields.

  Each content block has a content editor panel where you can use the tools available to design the content in that block.

  Add content and even images to these blocks accordingly to fill the page you are creating.

  To ensure the look is proper, save the content in between, and review the page at the front end; then come back and finalize the look and content accordingly.

- **Auto-translate into other languages:** Check mark this to automatically update the secondary language(s) data. The data in the subsequent language tab(s) will be auto-filled.

  ! *This feature is available only if the Microsoft text translator API is configured under* ***Settings > System configurations >*** *Third-party APIs.*

  If you prefer to manually fill in the secondary language(s) data, leave the checkbox unselected.

Once done, click **Save changes.**

! *If you had selected the auto-translate option, the secondary language tab(s) will be prefilled (excluding the image field). Review the data, make any necessary edits, click **Save changes**, and close the form.*

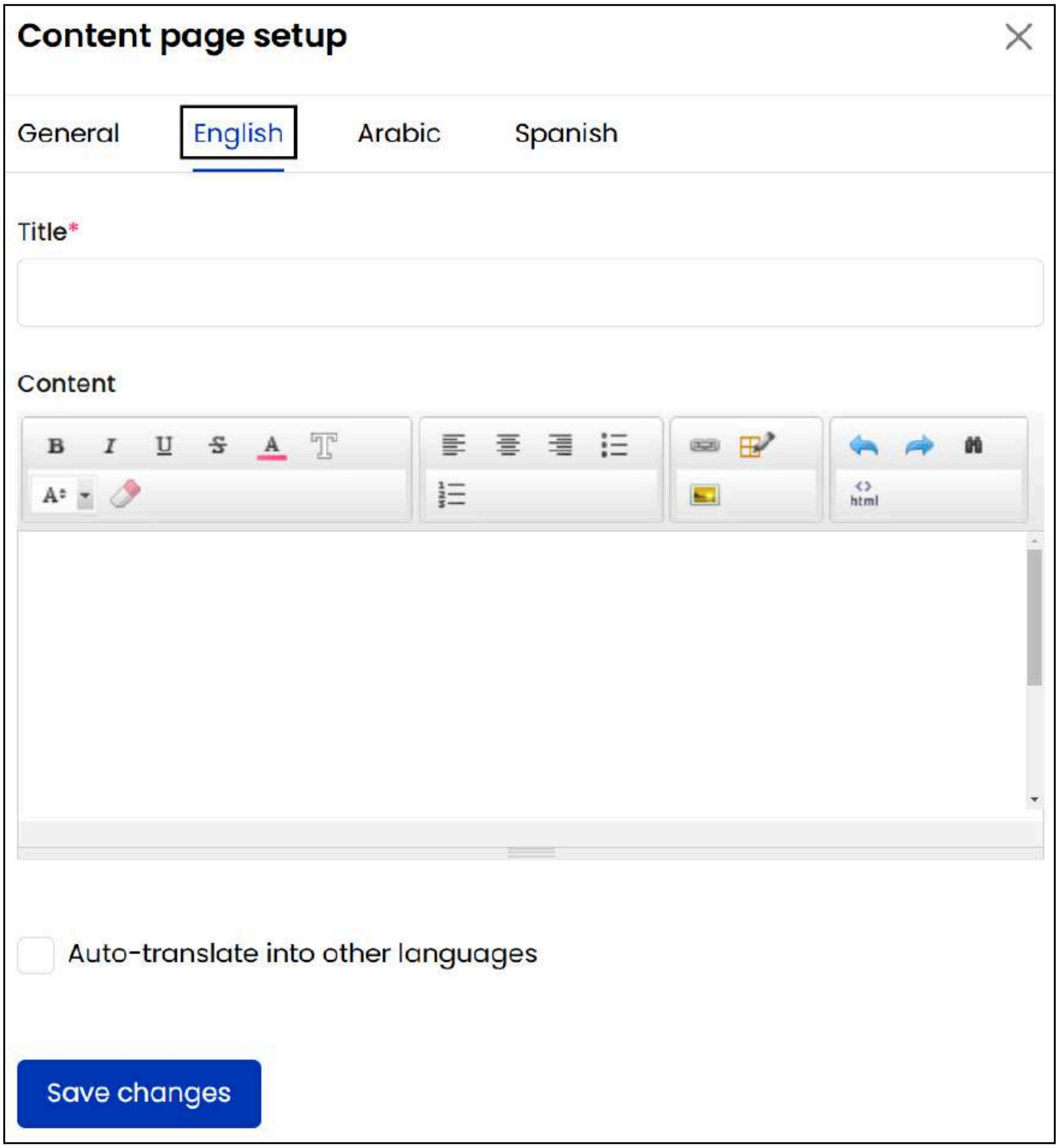
*If you did not use the auto-translate feature earlier, use the **Auto-translate & fill language data** button beside the **Save changes** button on each secondary language tab to auto-fill*

*the secondary language fields. Then, click **Save changes**, and move to the next tab, or close the form.*

*If you do not want to fill the secondary language tab(s) at this time, complete only the primary language tab (English tab), click **Save changes**, and close the form.*

Once everything has been updated, close the form by clicking  in the upper-right corner of the form.

Content page layout 2



DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

Update the following fields:

- **Title*:** Enter the page title that will be displayed at the front end as the page's heading.
- **Content:** Enter the page content and even add images in this page content block. Use the tools available to design the content accordingly.

  To ensure the look is proper, while updating the page content, save the details, and review the page at the front end; then come back and finalize the look and content accordingly.
- **Auto-translate into other languages:** Check mark this to automatically update the secondary language(s) data. The data in the subsequent language tab(s) will be auto-filled.

  *This feature is available only if the Microsoft text translator API is configured under **Settings > System configurations >** Third-party APIs.*

  If you prefer to manually fill in the secondary language(s) data, leave the checkbox unselected.

Once done, click **Save changes.**

The next tab(s) will be the secondary language tab(s) (Arabic, Spanish, etc.), which include the same fields as the English tab.

*If you had selected the auto-translate option, the secondary language tab(s) will be prefilled. Review the data, make any necessary edits, click **Save changes**, and close the form.*

*If you did not use the auto-translate feature earlier, use the **Auto-translate & fill language data** button beside the **Save changes** button on each secondary language tab to auto-fill the secondary language fields. Then, click **Save changes**, and move to the next tab, or close the form.*

*If you do not want to fill the secondary language tab(s) at this time, complete only the primary language tab (English tab), click **Save changes**, and close the form.*

Once everything has been updated, close the form by clicking  in the upper-right corner of the form.

Action buttons

Under the **Action** column, each entry includes two action buttons, allowing you to perform specific actions.

The functions of each button are explained in detail below:

i. Edit

Click this to edit the content page's details. The [Content page setup] form will appear. Update the fields, then click **Save changes**. To close the form, click in the upper-right corner.

ii. Delete

Click this to delete the content page from the system. A confirmation message will appear.

Click **OK** to confirm the action or **Cancel** to abort it.

Search for a content page

Use the search functionality at the top of the list to find a specific content page.

Click the search bar or to expand it. Click or the search bar again to collapse the section.

Enter the content page name in the **keyword** field and click **Search** to get the results.

Click **Clear** to reset the field and start a new search.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

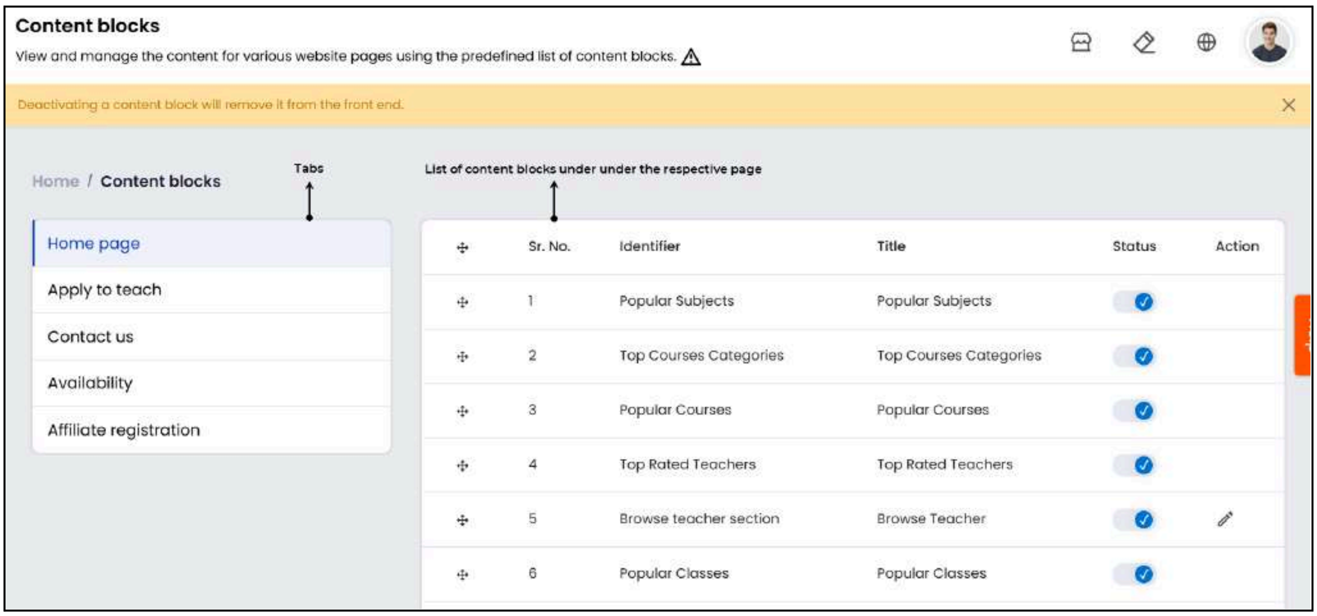
10.3 Content blocks

The **Content blocks** page allows you to view and edit content blocks that customize the platform's front end, making it more interactive for users.

These content blocks appear on key pages such as the **Home page, Apply to teach, Contact us, Availability**, and **Affiliate registration** pages.

Each page is organized into a separate tab, with its corresponding list of content blocks displayed on the right side.

View and manage content blocks for different pages by navigating through the tabs in the left menu.



You cannot add new content blocks or delete system-added blocks; you can only edit existing content blocks on specific predefined pages.

Additionally, some blocks have content that is system-fetched, so they cannot be edited. However, you can deactivate these blocks if you do not want them to appear on the front end.

*If you recently purchased the platform, these content blocks will contain placeholder text. Use the **Edit** button next to each block to update the content according to your needs.*

Manage the content blocks list

	Sr. No.	Identifier	Title	Status
	1	Popular Subjects	Popular Subjects	
	2	Top Courses Categories	Top Courses Categories	
	3	Popular Courses	Popular Courses	

Each tab contains the same type of list content, where each entry displays the following information and provides options for management including:

- **Drag-and-drop :** Click this next to a content block to move it up or down the list, and the serial numbers will automatically update to reflect the new sequence.

  The content blocks will appear on the front end of the applicable pages in the same order as they are arranged under their respective tabs on this page.

- **Sr. No.:** Serial number

- **Identifier:** The content block's system identifier, used to save data in the system and not displayed anywhere on the platform.

- **Title:** This title of the content block.

  Not all titles are displayed on the front end, as each section functions differently. Details on how each section works are explained under Types of content blocks.

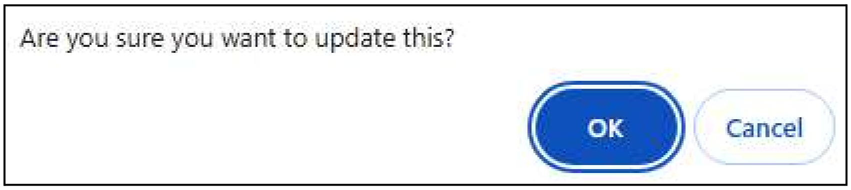
- **Status:** Edit the status (activate or deactivate) of a content block as per your requirements using the toggle switch beside it, under the status column.

  Turn **on** the toggle switch beside the content block to activate it. With this, the content block will be visible at the front end, on the respective page.

  Leave this **off** or turn it **off** to deactivate the content block, and the content block will be removed from the front end.

  A warning dialog box will appear for both actions, asking if you want to update the status or not.

<u>**DISCLAIMER:**</u> The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.



Click **Ok** to delete it or **Cancel** to abort the action.

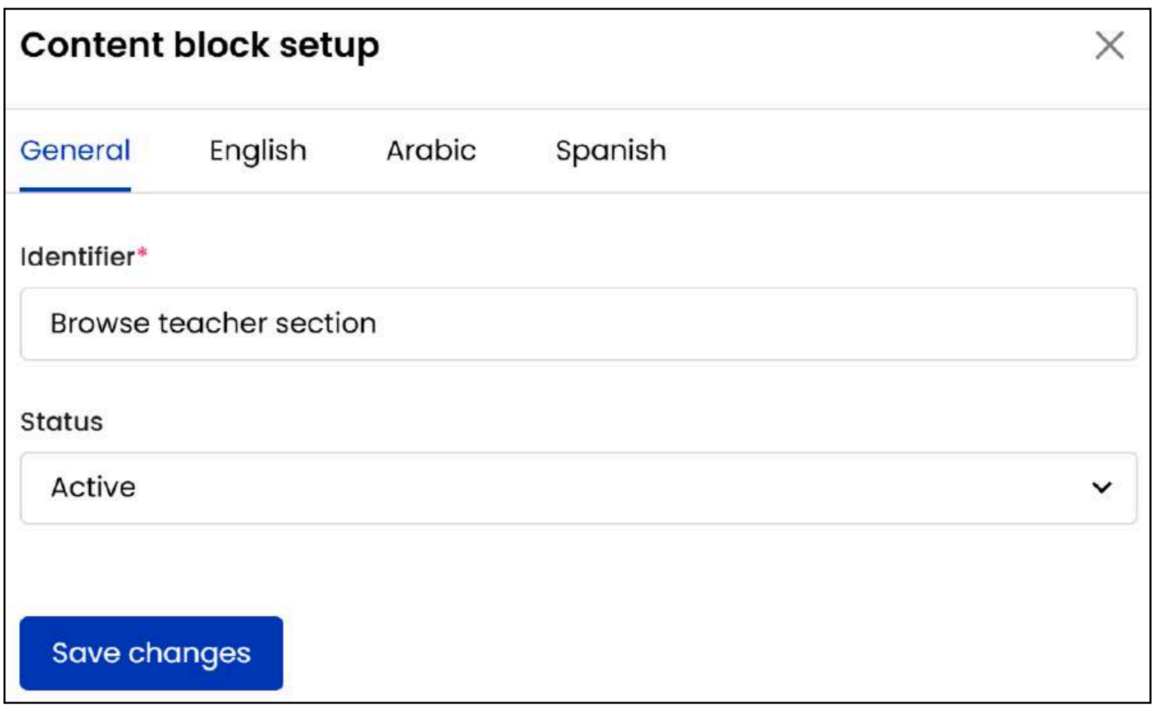
Action button

There is a single action button next to the admin-manageable content block entries—**Edit** .

*System-fetched content blocks, such as **Popular subjects** and **Popular Categories**, cannot be edited as their content is automatically generated by the system. As a result, they do not have an **Edit** button.*

Click this button beside the admin-manageable content block you want to edit.

The **Content block setup** form will appear. The form is the same for all the editable content blocks.



This form contains multiple tabs: the General tab, followed by the Primary language tab.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

After that, you'll find the [Secondary language](#) tabs, corresponding to the languages available on your platform.

Let's start with the **General tab**.

General tab

Review/update the following:

- **Identifier*:** Review/Edit the unique content block identifier.

  It can match the content block name, as defined under the Language data tabs (e.g., English, Arabic, Spanish).

  The identifier is used to save data in the system and will not be displayed anywhere on the platform. Ensure the identifier is unique; otherwise, an error message will appear.

- **Status:** Select the status of the content block.

  Click the field and select "**Active**" to publish it on the front end.

  Select "**Inactive**" to temporarily hide the content block from the front end.

Once done, click **Save changes**.

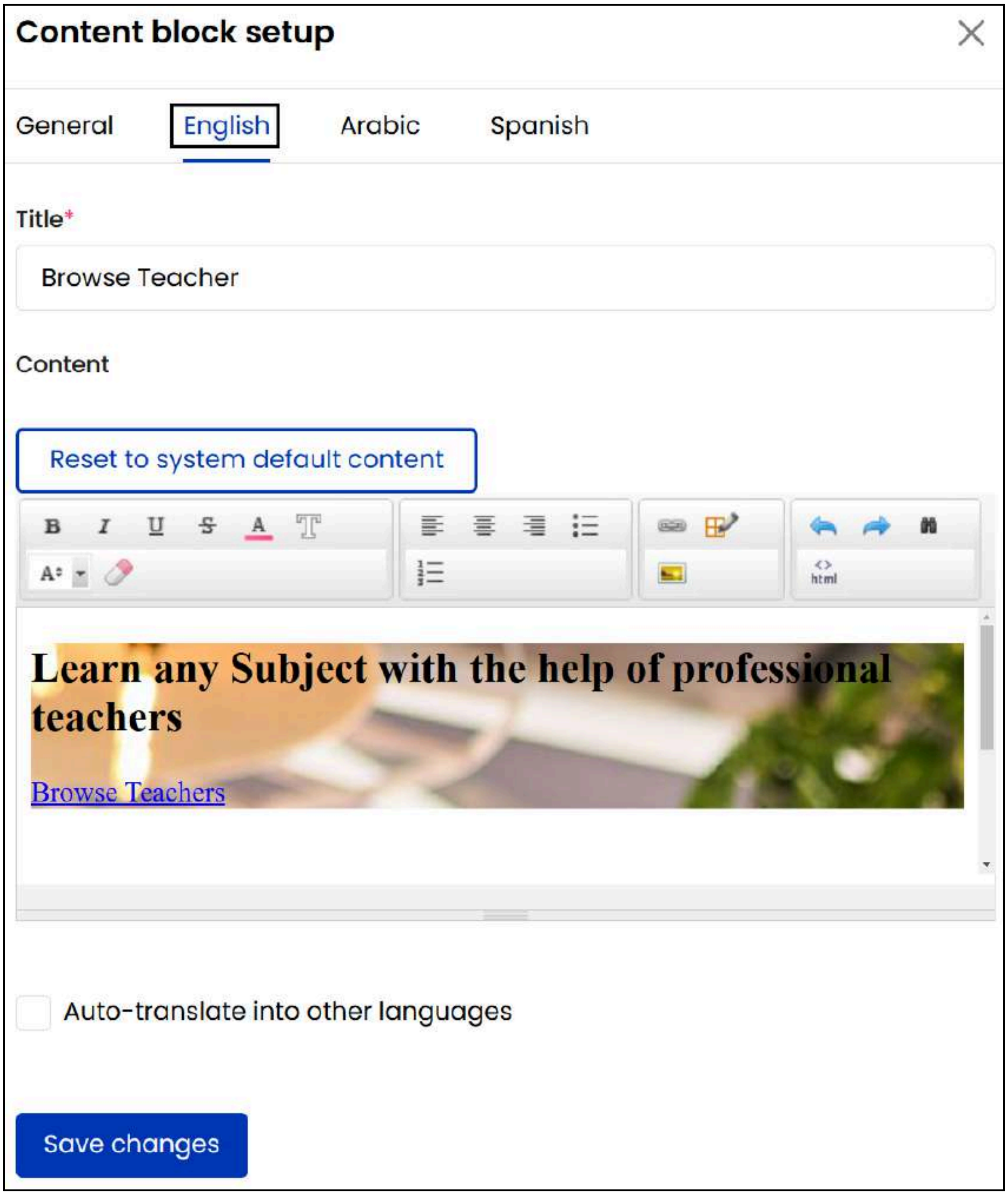
This will direct you to the next tab, which is the primary language tab (English tab).

English tab

This is the primary language tab, and completing this tab is mandatory for publishing the content block on the platform.

Since English is set as the primary language, this tab is labeled **English**.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.



Review/update the following:

- **Title*:** Review/Edit the title of the section. This content is for SEO purposes only and is not displayed anywhere on the platform.
- **Content:** Review/Edit the content of the section using the content editor panel. Use the available tools to design and customize the content. Add text and images as needed.

  To ensure proper formatting, save your changes periodically, review the page on the front end, and make final adjustments as necessary.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

- **Reset to system default content:** Click this button to reset the content back to how it was when you purchased the product (dummy content).
- **Auto-translate into other languages:** Check mark this to automatically update the secondary language(s) data. The data in the subsequent language tab(s) will be auto-filled.

  This feature is available only if the [Microsoft text translator API](#) is configured under ***Settings > System configurations >*** *[Third-party APIs](#).*

  If you prefer to manually fill in the secondary language(s) data, leave the checkbox unselected.

Once done, click **Save changes**.

The next tab(s) will be the secondary language tab(s) (Arabic, Spanish, etc.), which include the same fields as the English tab.

If you had selected the auto-translate option, the secondary language tab(s) will be prefilled. Review the data, make any necessary edits, click ***Save changes****, and close the form.*

If you did not use the auto-translate feature earlier, use the ***Auto-translate & fill language data*** *button beside the* ***Save changes*** *button on each secondary language tab to auto-fill the secondary language fields. Then, click* ***Save changes****, and move to the next tab, or close the form.*

If you do not want to fill the secondary language tab(s) at this time, complete only the primary language tab (English tab), click ***Save changes****, and close the form.*

After updating all necessary fields, click in the upper-right corner of the form.

Types of content blocks

Each tab and its content blocks are explained below, detailing where each content block appears and how to edit them:

10.3.1 Home page

The information displayed on the home page can be either system-fetched or admin-managed.

The system-fetched content blocks cannot be edited. They can only be deactivated and their position can be changed. And the admin-managed content blocks can be edited, deactivated and their position can be changed.

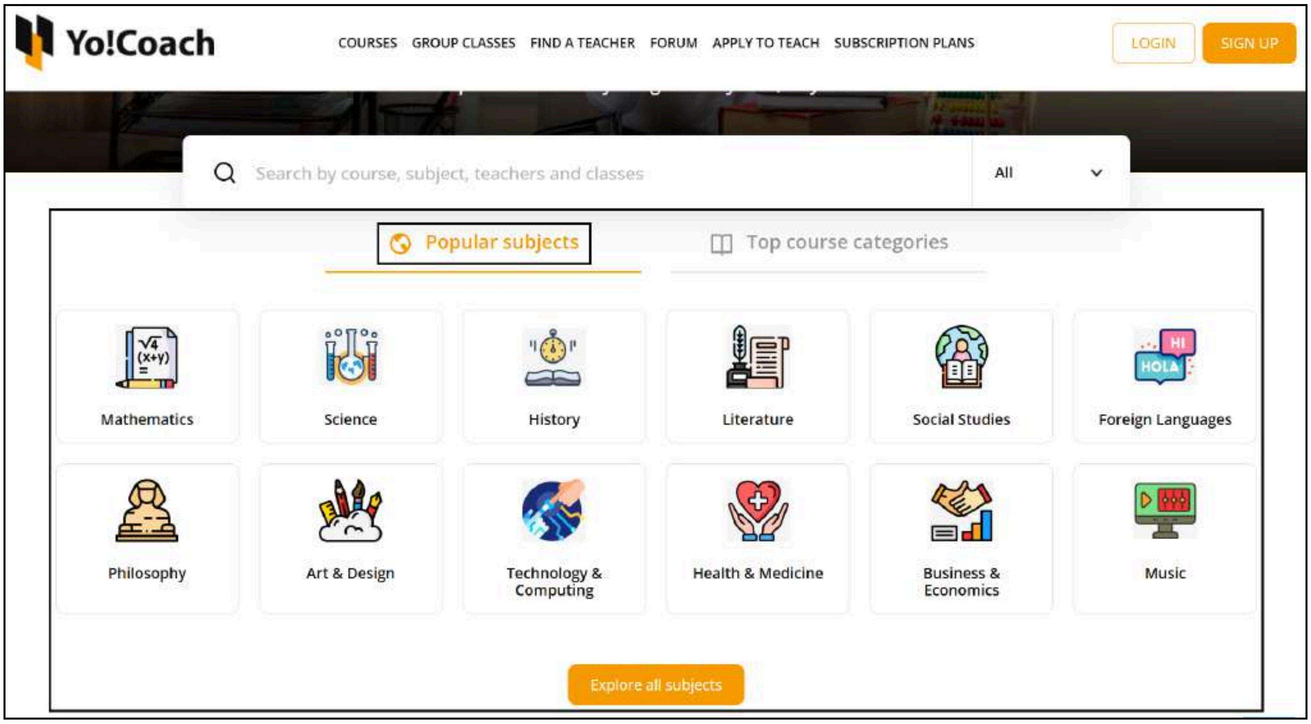
Here is an overview of the homepage content blocks, including their appearance, how to edit them, and how their content is generated:

a. Popular subjects

This section lists all the subjects that have been marked as **Featured** under **Teacher preferences >** [Teaching subjects](#).

Only the first 12 subjects that have been marked as featured will be displayed here. Use the drag-and-drop feature to set the priority of the subjects on the front end.

Also, this section is built together with the [*Top course categories*](#) *section. While you can reposition its tab to appear before or after the* [*Top course categories*](#) *tab, both sections will remain in the same position on the page. To move them elsewhere, you must move both sections together within the list.*



This section is system-generated, meaning its layout and the number of displayed items cannot be modified.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

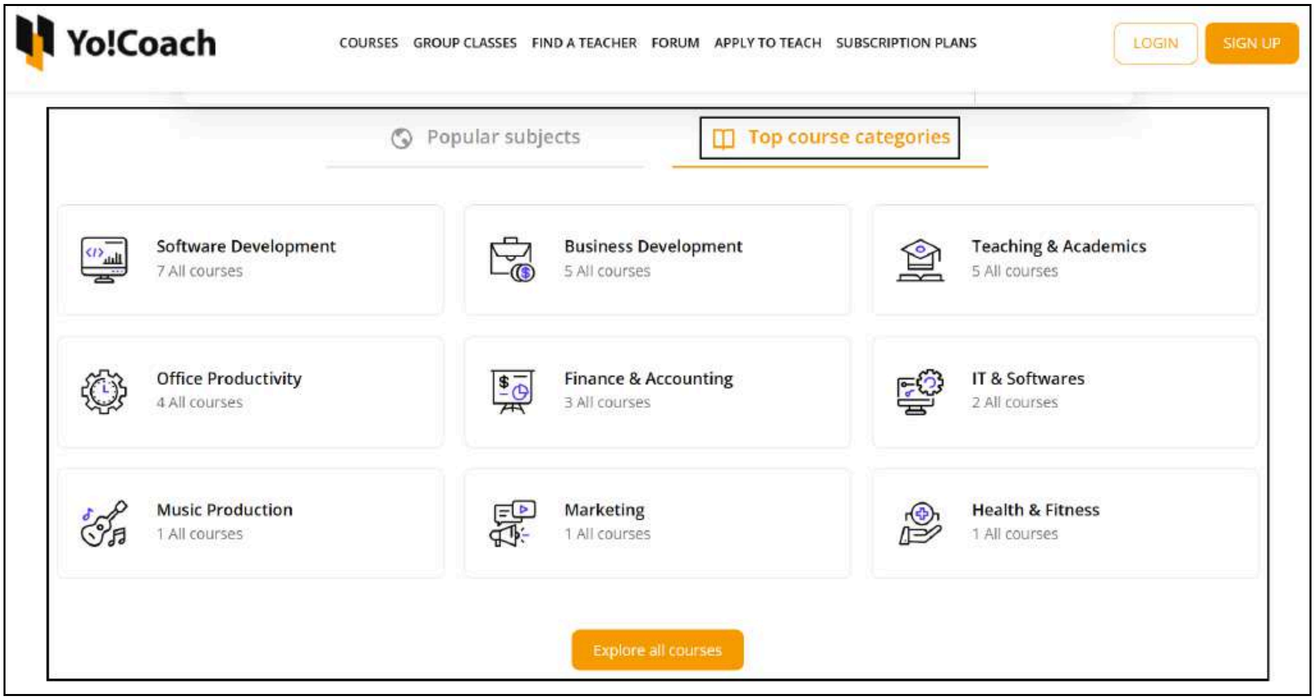
However, you can control which subjects appear by marking them as featured under **Teacher preferences >** [Teaching subjects](). Additionally, the section title and button text can be customized under **CMS >** [Language labels]().

b. Top course categories

This section appears as a tab next to the [Popular subjects]() section. Clicking the tab opens the corresponding section, which lists all popular course categories on the platform.

The system automatically determines which course categories appear here based on the sold count, so they cannot be manually selected. However, you can review all course categories on your platform under **Courses >** [Course categories]().

This section is built together with the [Popular subjects]() section. While you can reposition its tab to appear before or after the [Popular subjects]() tab, both sections will remain in the same position on the page. To move them elsewhere, you must move both sections together within the list.



This section is system-generated, meaning its layout, the course categories listed and the number of displayed items cannot be modified.

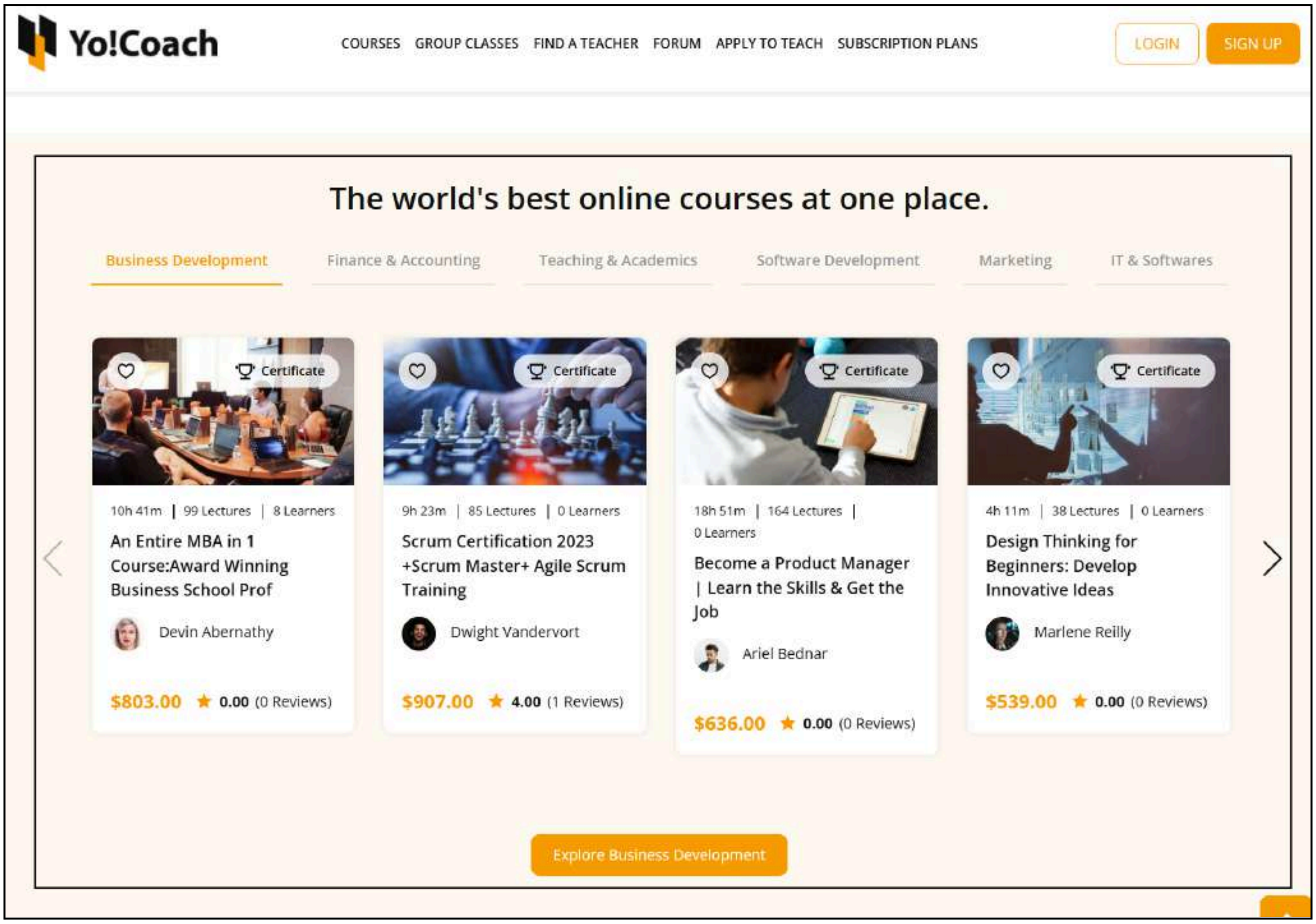
However, the section title and button text can be customized under **CMS >** [Language labels]().

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

c. Popular courses

This section displays popular courses from the first six course categories marked as **Featured** under **Courses** > [Course categories](). Within each category, the system highlights courses based on the number of learners and an internal rating algorithm. The displayed courses are selected automatically and cannot be manually chosen.

However, you can review all courses on your platform under **Courses** > [All courses]().

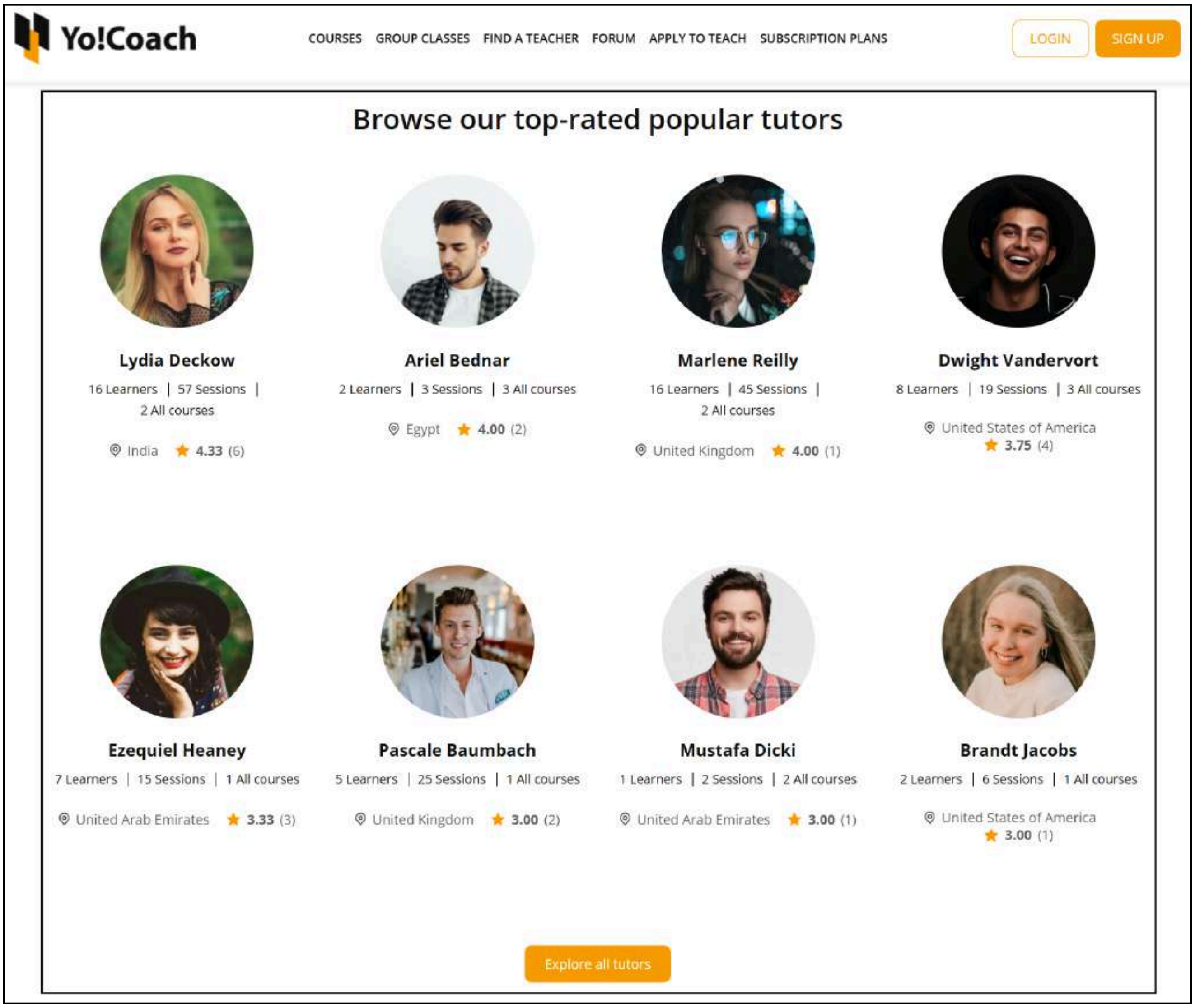


This section is system-generated, meaning its layout, the courses displayed, and the number of displayed items cannot be modified.

However, you can control which course categories appear by marking them as featured under **Courses** > [Course categories](). Additionally, the section title and button text can be customized under **CMS** > [Language labels]().

d. Top rated teachers

This section displays the 8 highest-rated teachers on the platform. The system automatically selects and showcases these teachers based on their ratings, so the content cannot be managed manually. To view all teacher profiles, go to **Users > Platform users**.



This section is system-generated, meaning its layout and the number of displayed items cannot be modified.

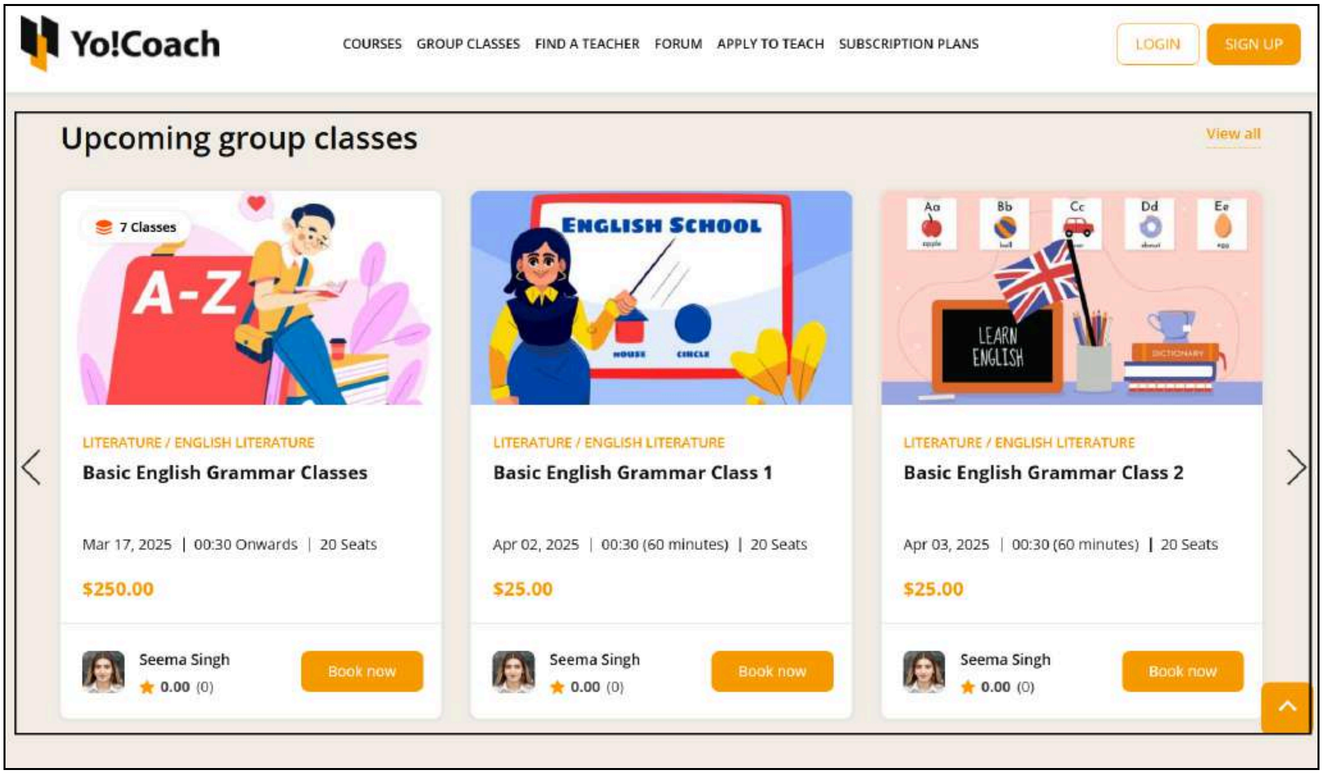
However, the section title and button text can be customized under **CMS > Language labels**.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

e. Popular classes

This section lists all upcoming group classes on the platform, with the most recently scheduled class shown at the top of the list.

The system automatically determines which group classes appear here, so they cannot be manually selected.



However, you can review all group classes scheduled on the platform under [Group classes].

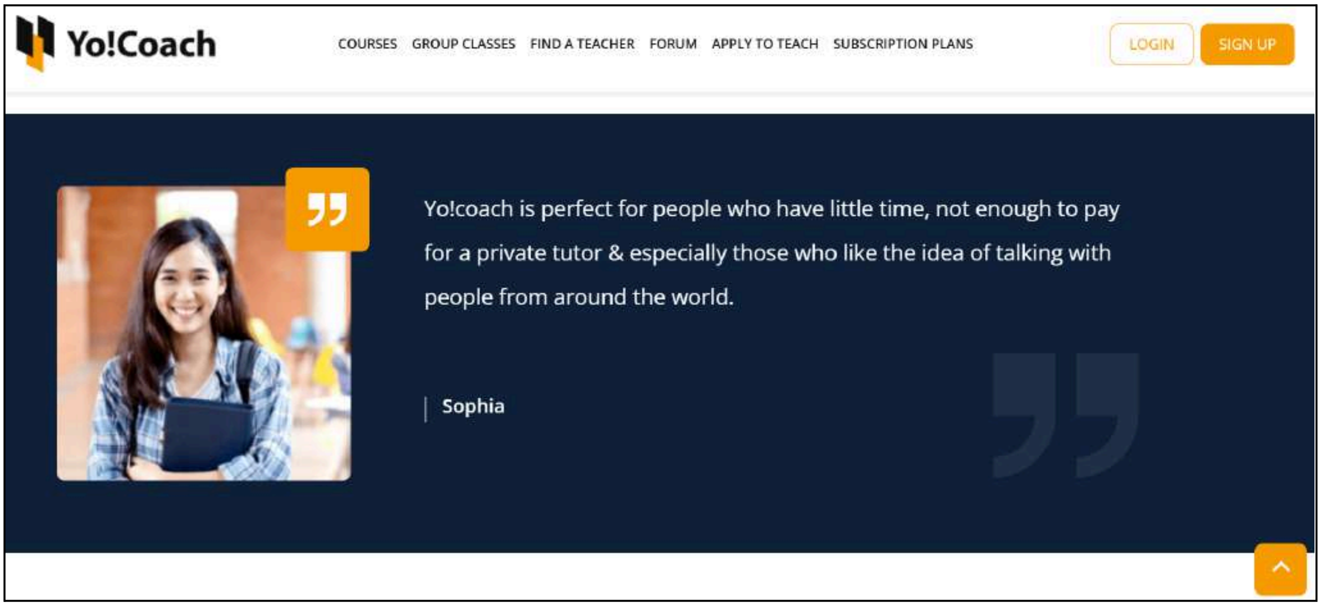
This section is system-generated, meaning its layout, the group classes and the number of displayed items cannot be modified.

However, the section title and button text can be customized under **CMS >** [Language labels].

f. Testimonials

This section displays the first four active testimonials added under **CMS >** [Testimonials].

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

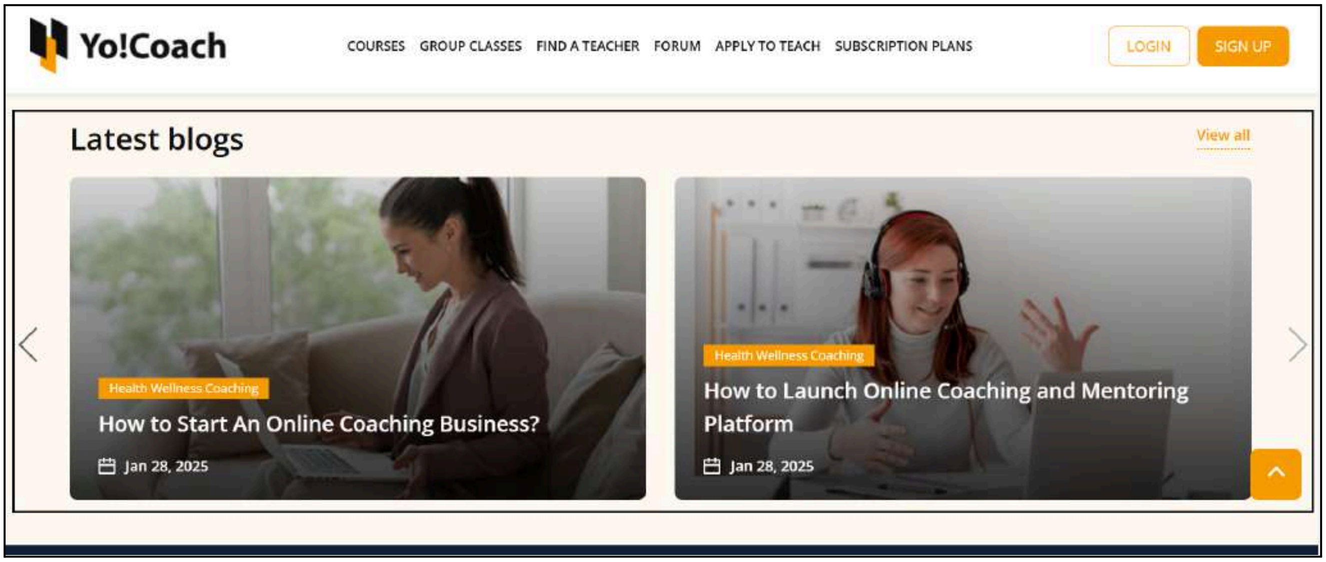


It is system-generated, so the layout and number of displayed items cannot be modified. However, only the active testimonials from the **CMS >** [Testimonials]() list will appear.

Additionally, the section title and button text can be customized under **CMS >** [Language labels]().

g. Latest blogs

This section displays the latest blogs added under **Blog >** [Blog posts]().



DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

Only the first 4 latest blog posts will be displayed at a time here.

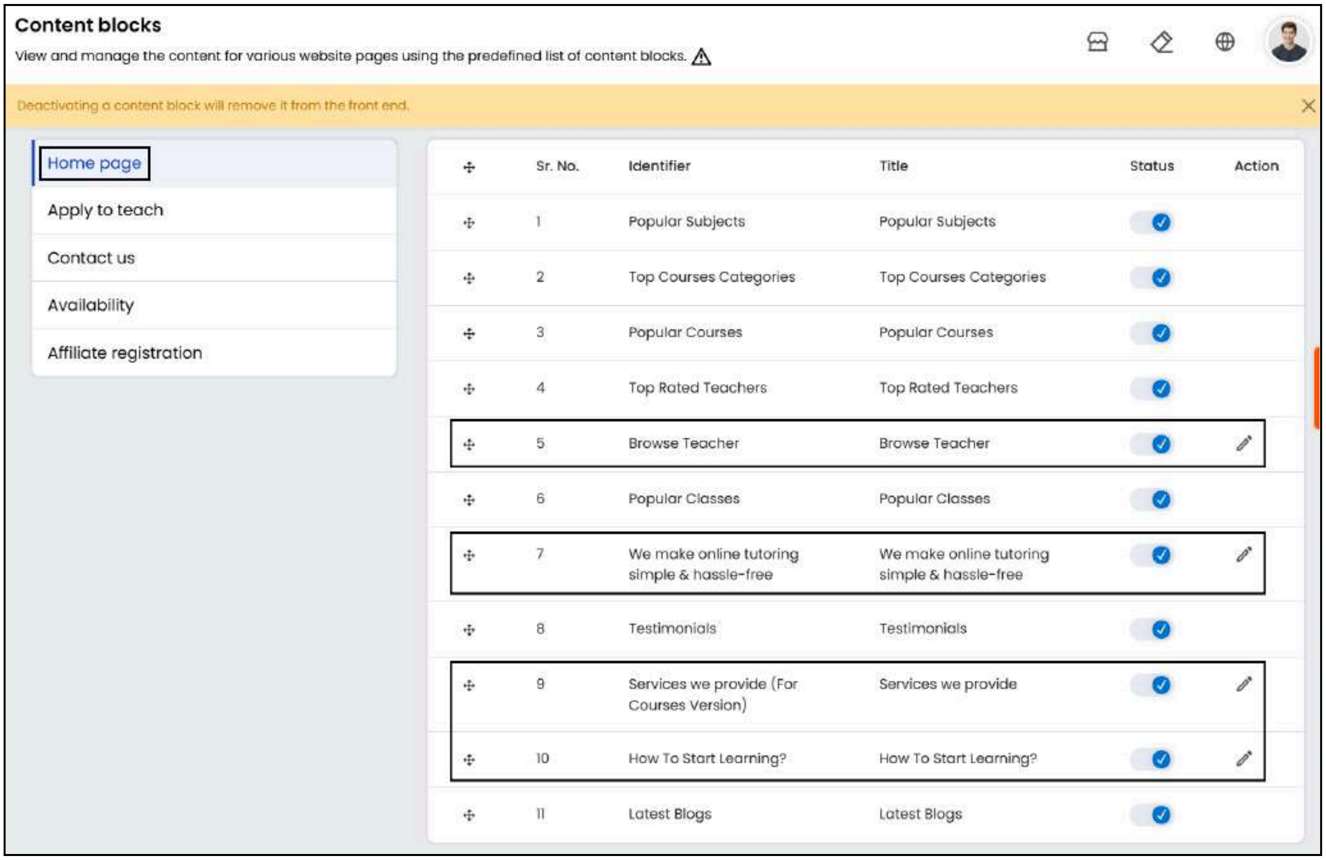
This section is system-generated, meaning its layout and the number of displayed items cannot be modified.

However, you can control which blog posts appear by adding new blog posts under **Blog** > [Blog posts](#).

Additionally, the section title can be customized under **CMS** > [Language labels](#).

h. Admin-manageable sections

There are a total of four sections on the home page that are admin-manageable, and are fully customizable, allowing you to edit them as needed using the [edit button](#).



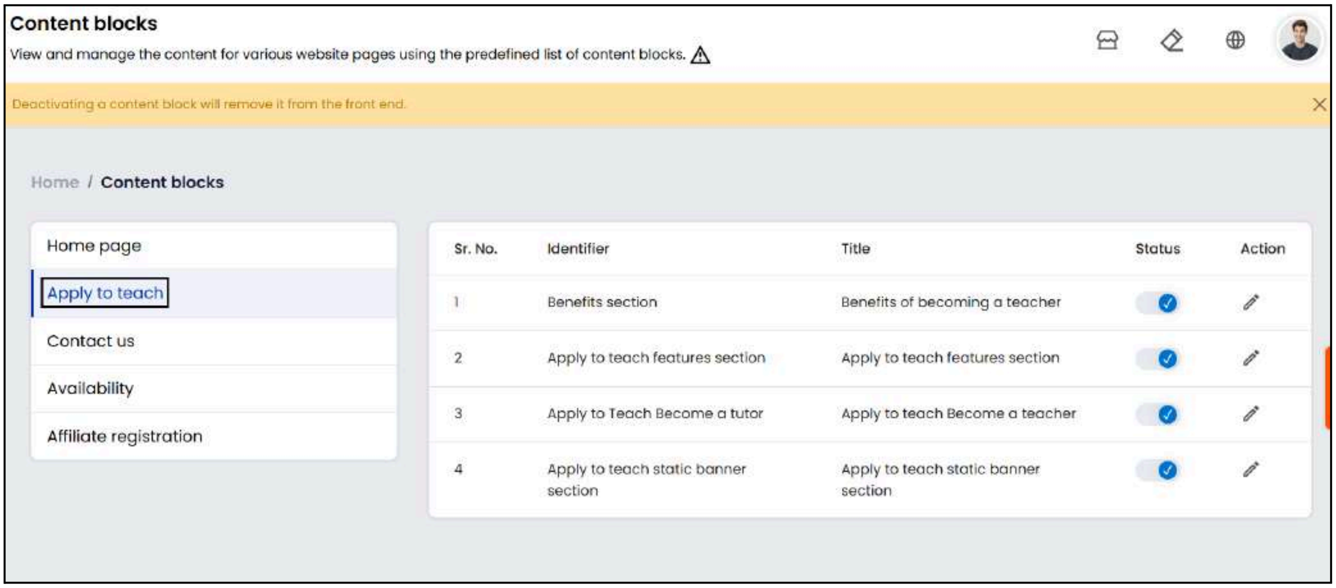
By default, these blocks contain placeholder content that you can modify.

Section names and appearances may vary based on your platform's niche and any modifications made, as the identifier, title, and content for each section can be customized using the edit button.

*The last editable section "**How to start learning?**" is visible only if the courses module is deactivated. To manage it, go to **Settings > System configurations > System**.*

10.3.2 Apply to teach

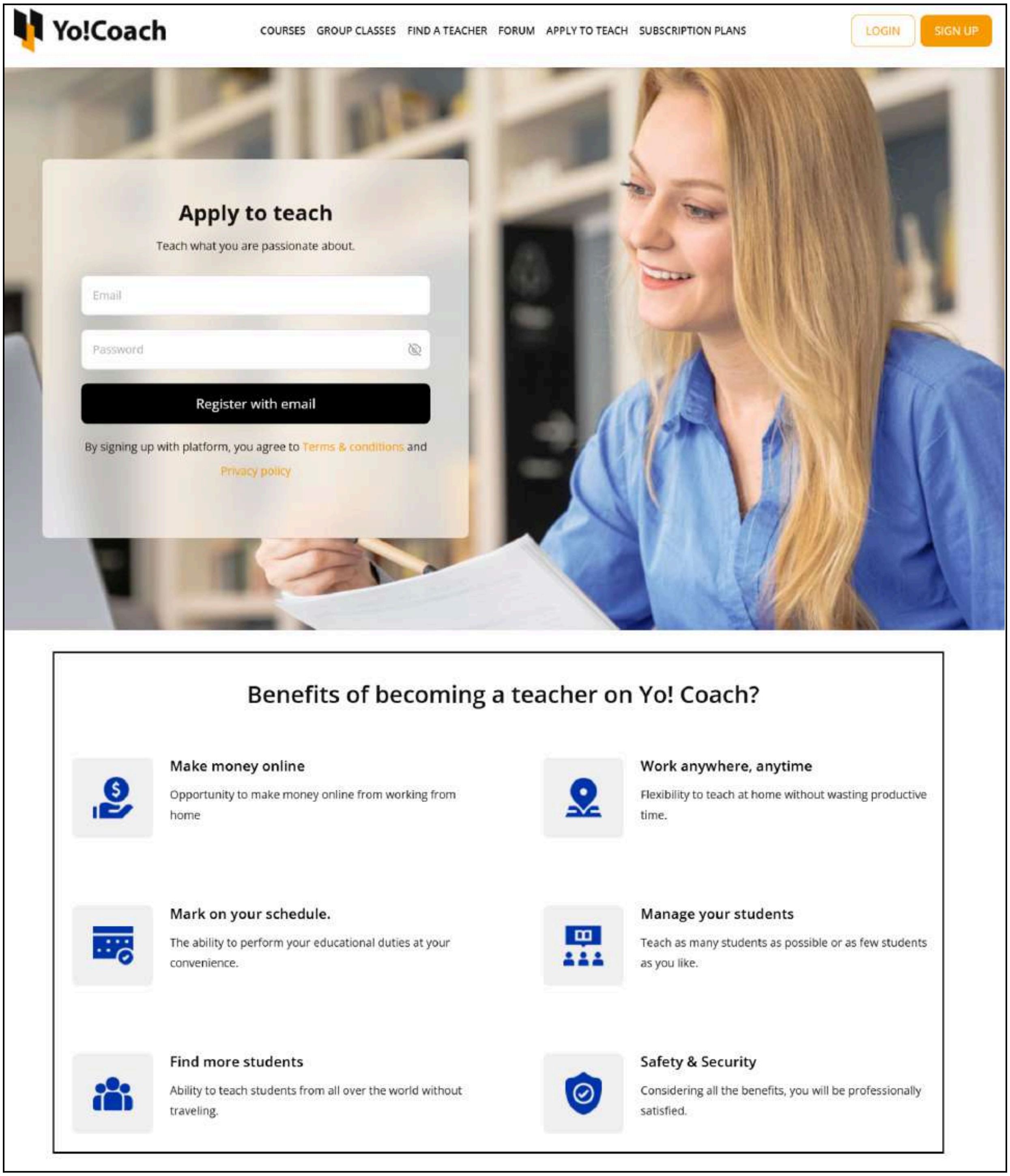
Click this tab to customize how the **Apply to Teach** page appears on the front end.



There are a total of four content blocks for this page that are admin-managed and fully customizable.

These sections appear in the same order as listed, on the front end, below the teacher sign-up form.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.



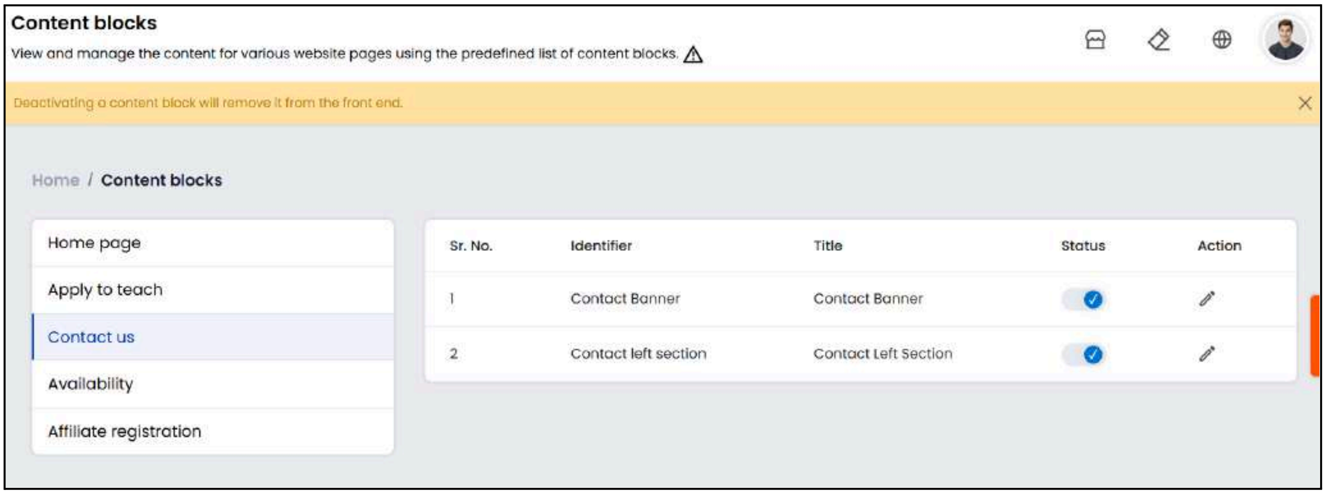
By default, these blocks contain placeholder text. Use the Edit button to modify them as needed.

Section names and appearances may vary based on your platform's niche and any modifications made, as the identifier, title, and content for each section can be customized using the edit button.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

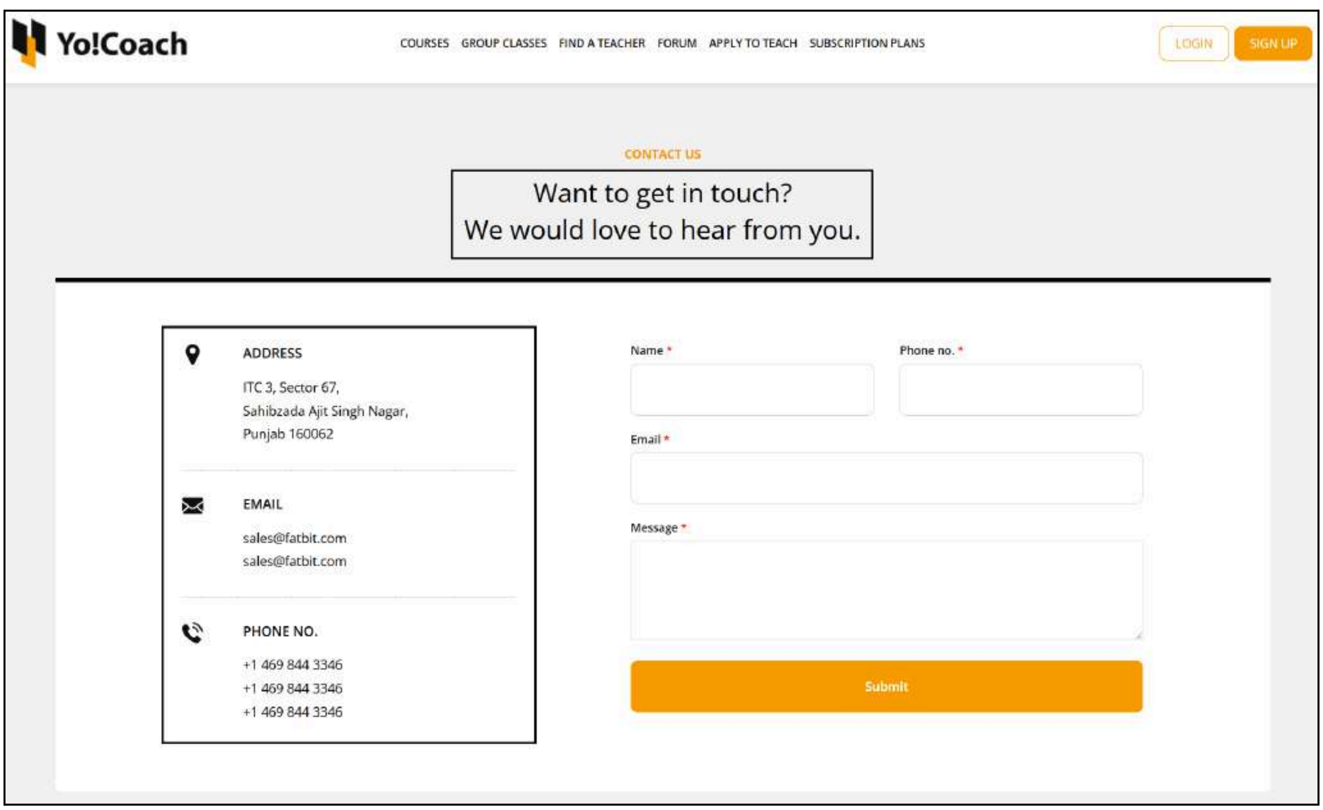
10.3.3 Contact us

Click this tab to customize how the **Contact us** page appears on the front end.



There are a total of two content blocks for this page that are admin-managed and fully customizable.

*The **drag-and-drop** feature is not available on this tab, so the section positions cannot be changed.*



DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

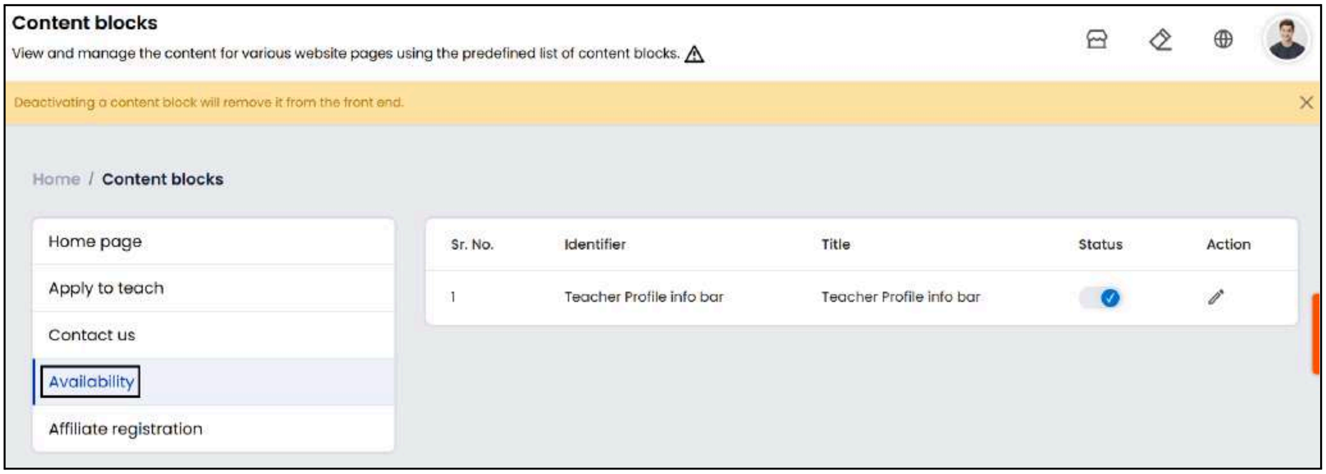
The **Contact banner** block appears below the page name at the top of the form, while the **Contact left section** block is displayed on the left side of the form (as shown in the image above).

By default, these blocks contain placeholder text. Use the [Edit button] to modify them as needed.

Section names and appearances may vary based on your platform's niche and any modifications made, as the identifier, title, and content for each section can be customized using the [edit button].

10.3.4 Availability

Click this tab to customize how the **Availability calendar** page appears on the teacher panel.

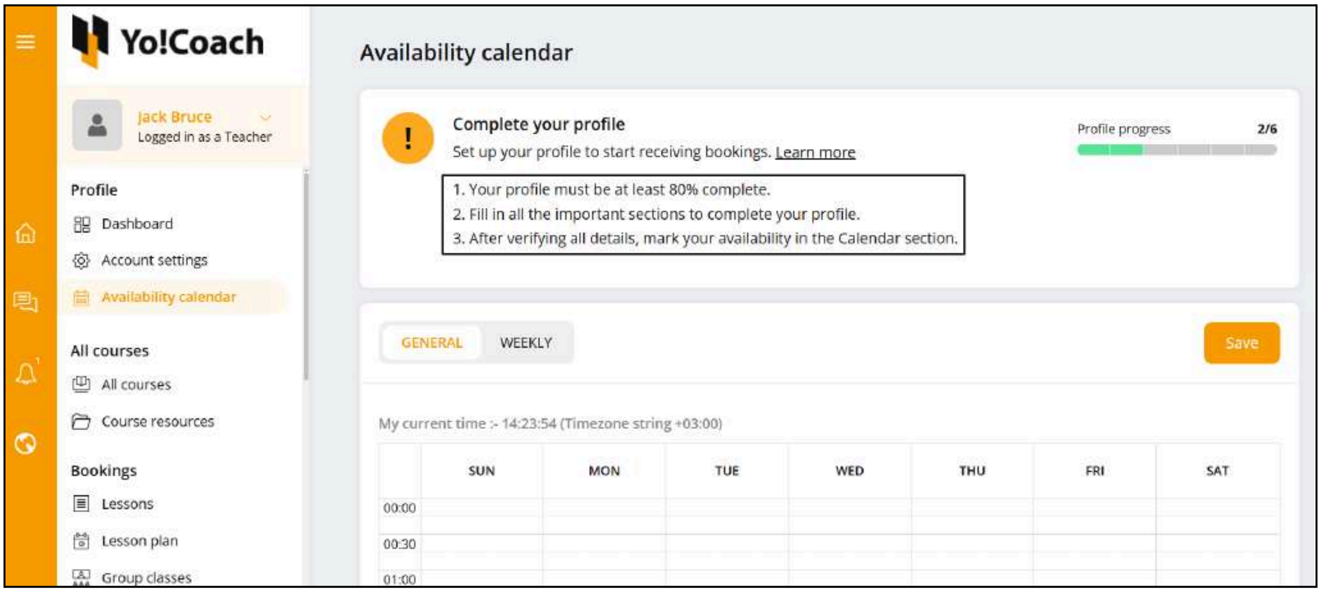


There is only one content block for this page that is admin-managed and fully customizable.

*Since there is only one content block, the **drag-and-drop** feature is not available on this tab.*

This content block is located on the teacher panel below the **Complete your Profile** progress bar on the **Availability calendar** page.

It appears when someone clicks the **Learn more** link next to the progress bar content as shown in the image below.

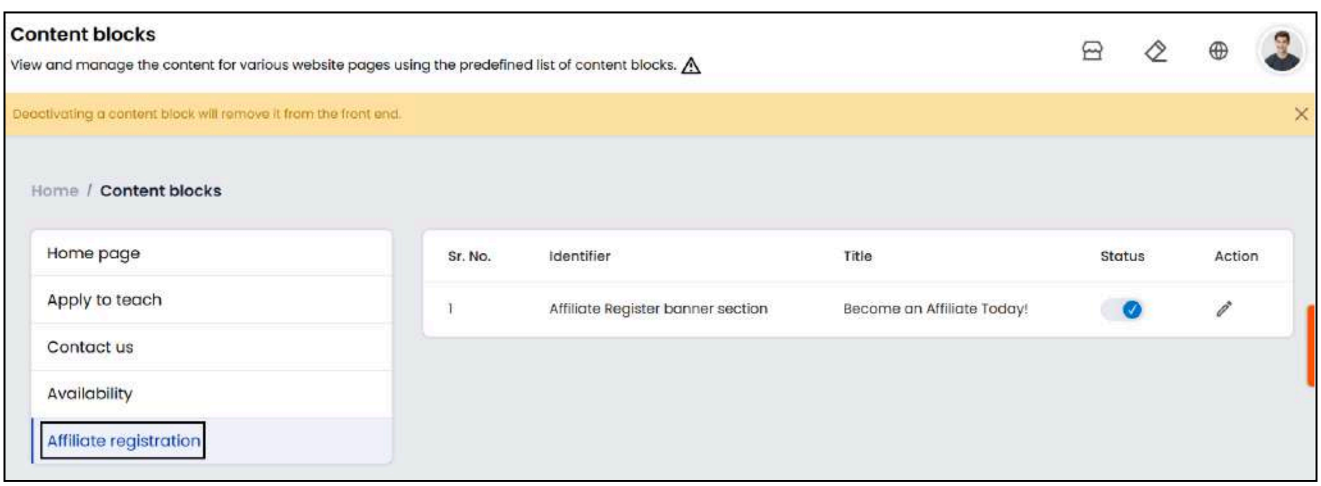


By default, this block contains placeholder text. Use the Edit button to modify it as needed.

The section name and appearance may vary based on your platform's niche and any modifications made, as the identifier, title, and content can be customized using the edit button.

10.3.5 Affiliate registration

Click this tab to customize how the **Affiliate registration** page appears on the front end.

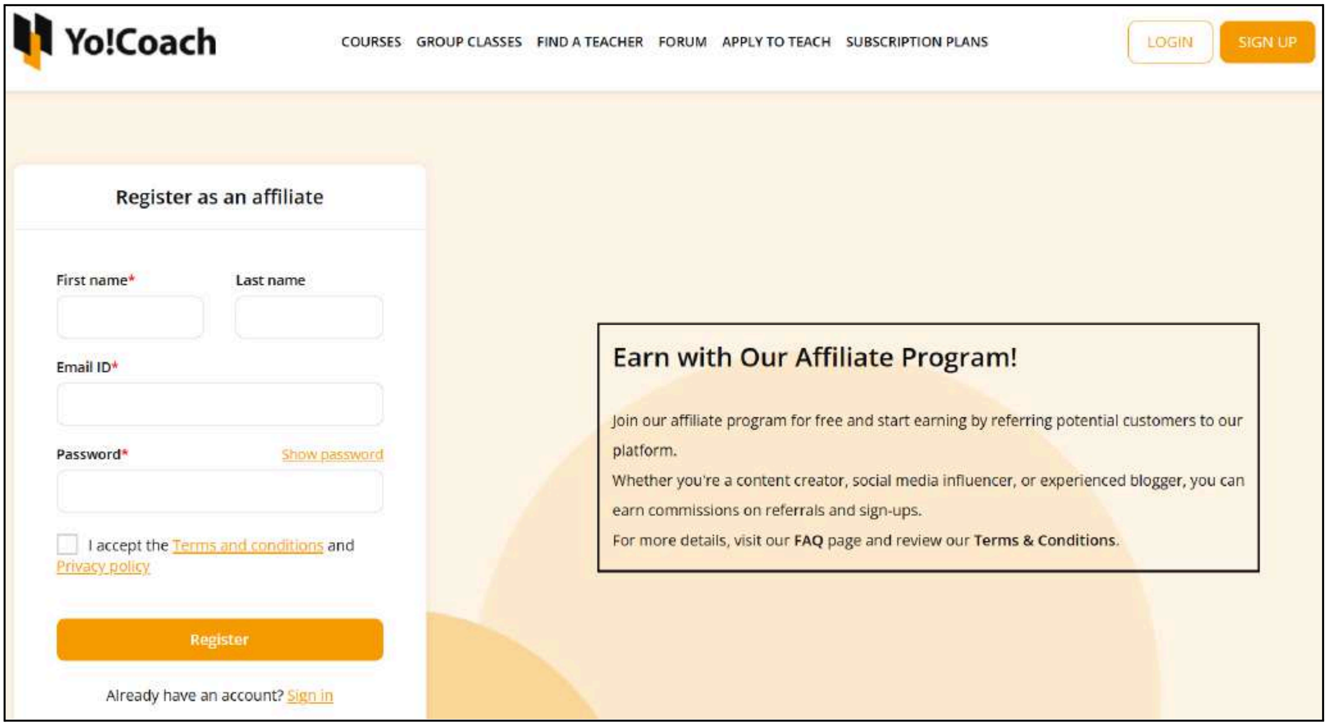


DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

There is only one content block for this page that is admin-managed and fully customizable.

*Since there is only one content block, the **drag-and-drop** feature is not available on this tab.*

This content block appears on the **Become an Affiliate** page at the front end, positioned to the right of the **Registration form** (as shown in the image below).



By default, this block contains placeholder text. Use the [Edit button] to modify it as needed.

The section name and appearance may vary based on your platform's niche and any modifications made, as the identifier, title, and content can be customized using the [edit button].

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

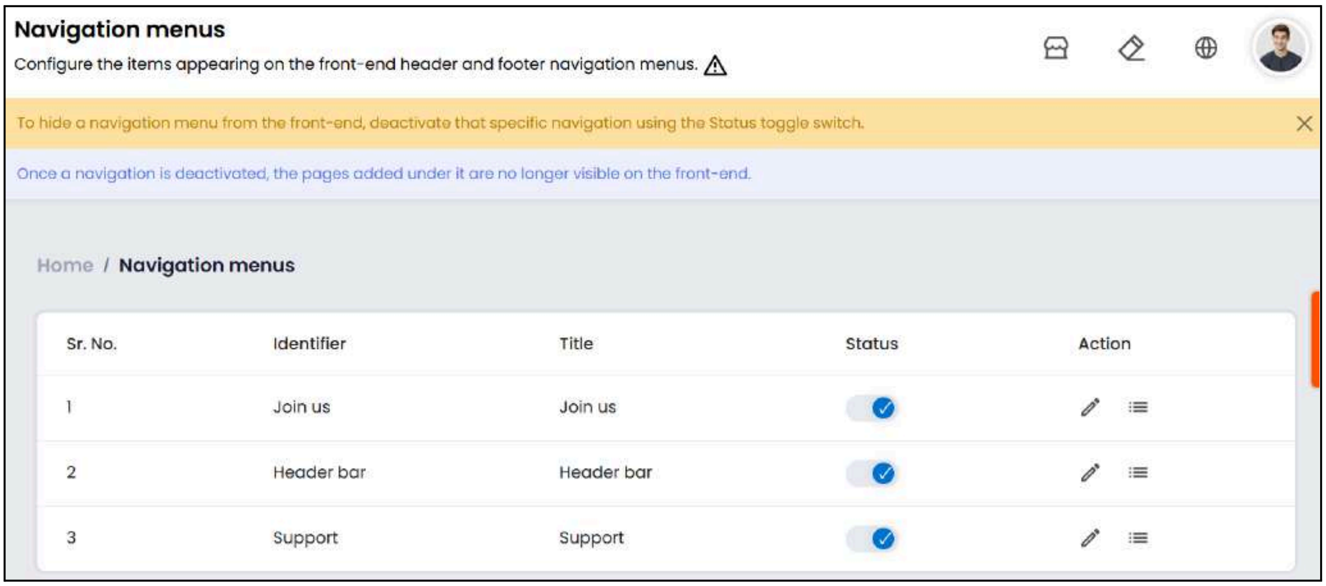
10.4 Navigation menus

Navigation plays a crucial role in any website, providing a clear path for users to access different pages and information.

Yo!Coach allows you to manage all navigation elements through this submodule. By default, the system includes three navigation menus.

While you cannot add or delete menus, you can deactivate those you don't need.

You can also modify existing menus by editing their names, adding or removing pages, and adjusting the sequence of pages under each menu.



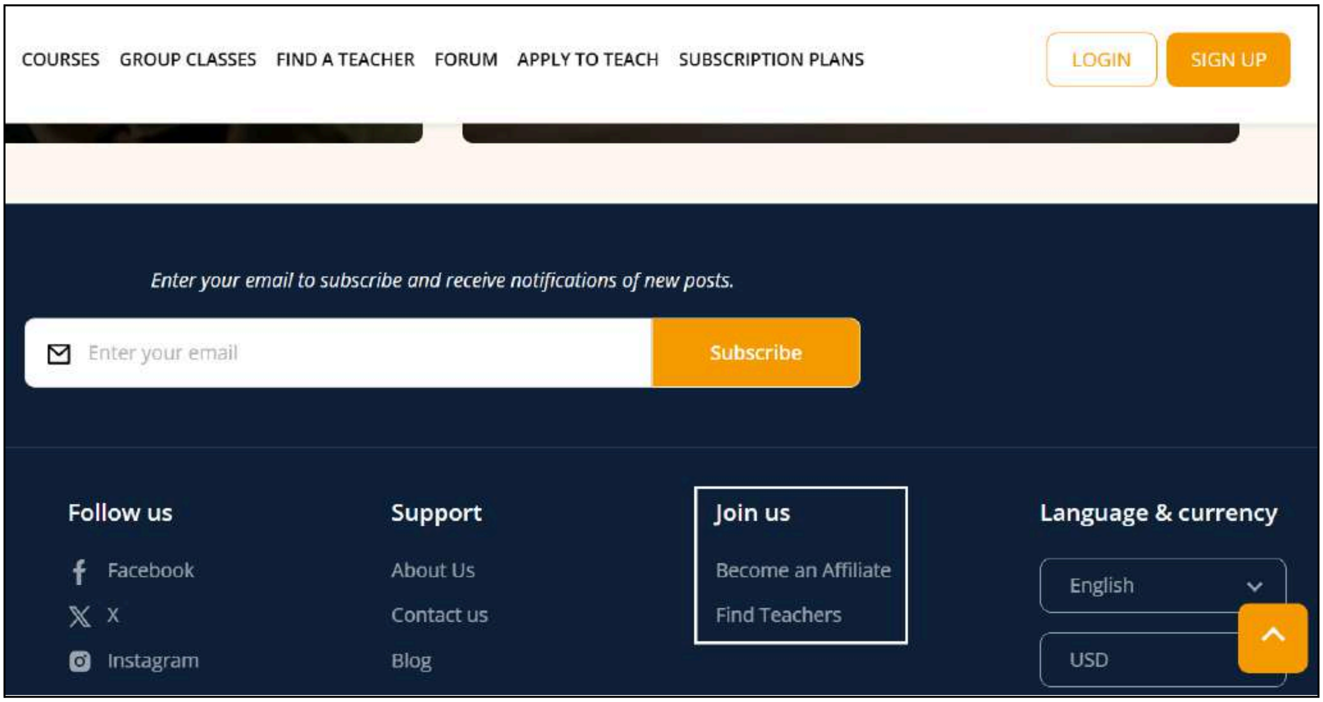
Each navigation menu appears in a different location on the front end.

The navigation menu titles, identifiers and items may vary based on your platform's niche and any modifications made using the edit button.

Here's how they are displayed:

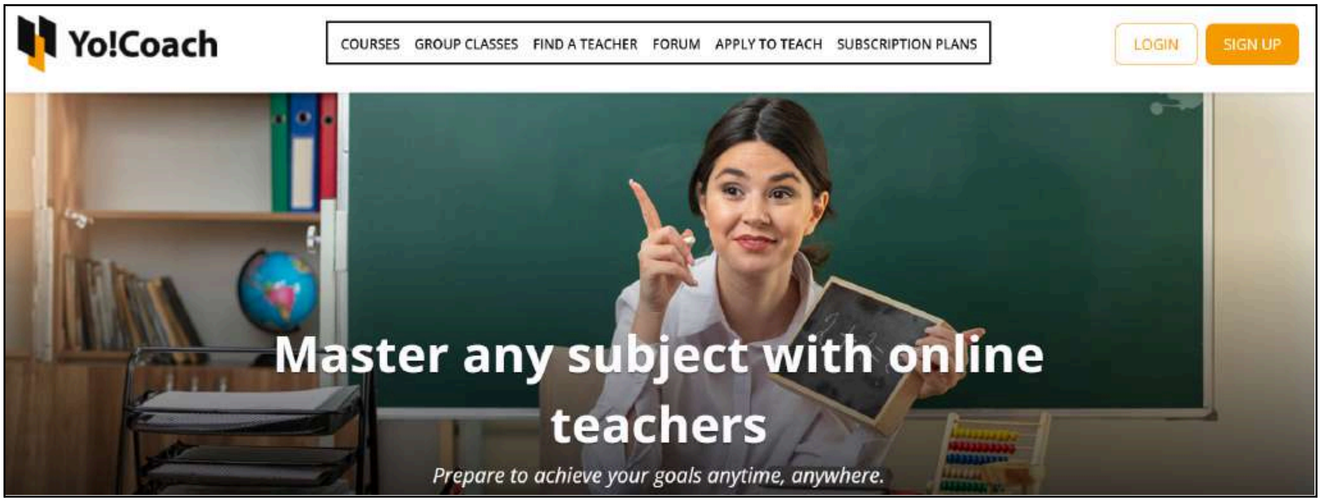
10.4.1 Join us

This is displayed in the footer of all front-end pages.



10.4.2 Header bar

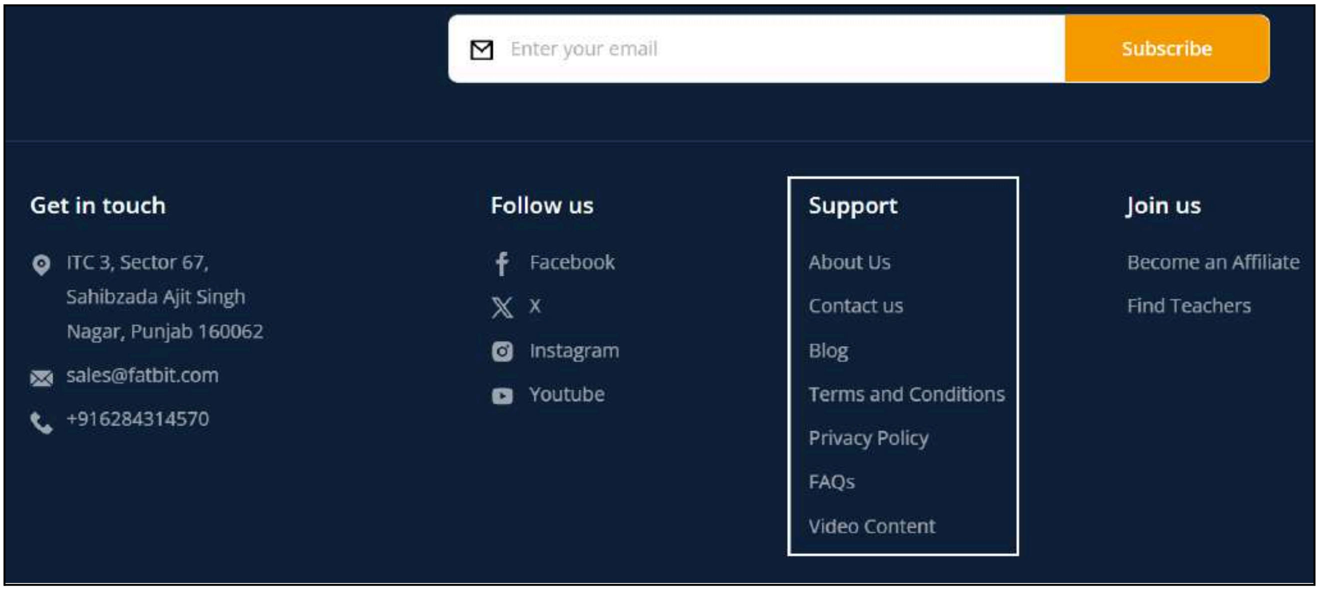
This is displayed at the top of all front-end pages.



10.4.3 Support

This is displayed in the footer of all front-end pages.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.



Manage the navigation menus list

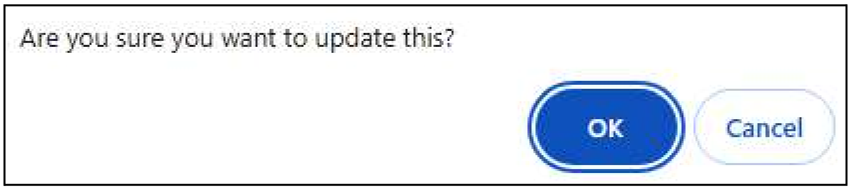
Each entry in the list includes the following details and provides options for management including:

- **Sr. no:** Serial number.
- **Identifier:** The content block's system identifier, used to save data in the system and not displayed anywhere on the platform.
- **Title:** The navigation menu title displayed on the front end, except for the header bar menu.
- **Status:** Edit the status (activate or deactivate) of a navigation menu as per your requirements using the toggle switch beside it, under the status column.

  Turn **on** the toggle switch beside the navigation menu to activate it. Leave this **off** or turn it **off** to deactivate the navigation menu, and the menu will be removed from the front end, along with all the menu items that are linked to it.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

A warning dialog box will appear for both actions, asking if you want to update the status or not.



Click **Ok** to delete it or **Cancel** to abort the action.

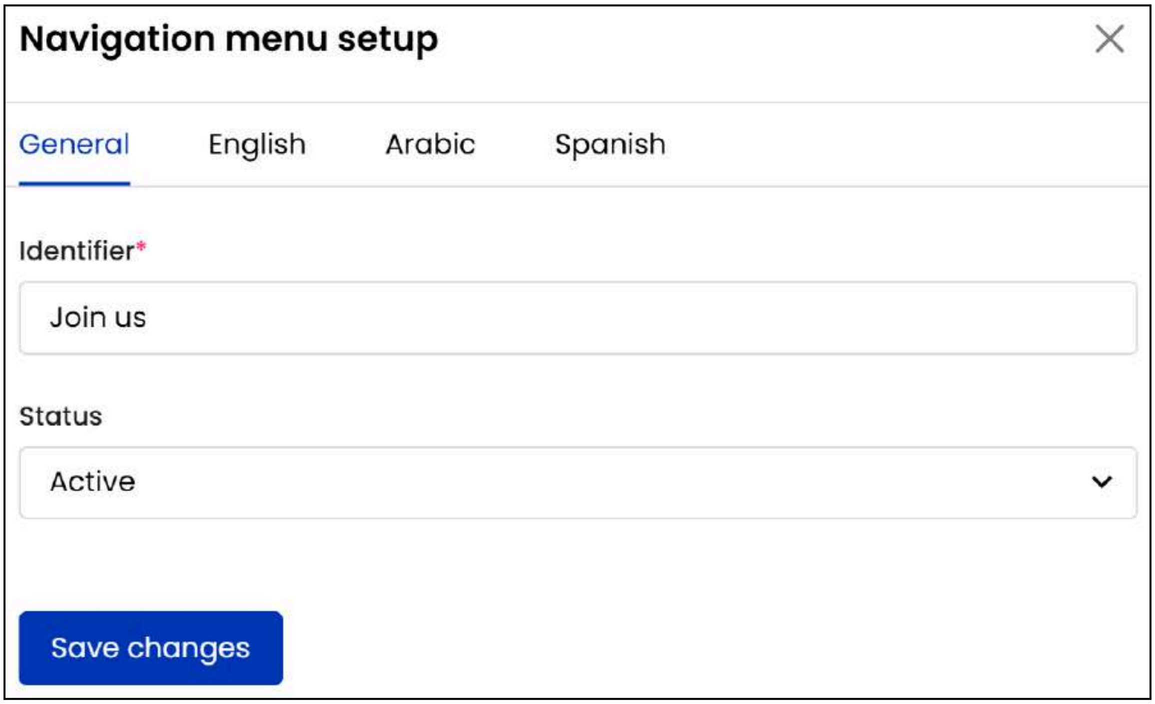
Action buttons

Under the **Action** column, each entry includes two action buttons, allowing you to perform specific actions.

The functions of each button are explained in detail below:

i. Edit

Click this to edit the navigation menu's details. The **Navigation menu setup** form will appear. The form is the same for all the editable content blocks.



DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

This form contains multiple tabs: the General tab, followed by the Primary language tab.

After that, you'll find the Secondary language tabs, corresponding to the languages available on your platform.

Let's start with the **General tab**.

General tab

Review/update the following:

- **Identifier*:** Review/Edit the unique navigation menu identifier.

  It can match the navigation menu name, as defined under the Language data tabs (e.g., English, Arabic, Spanish).

  The identifier is used to save data in the system and will not be displayed anywhere on the platform. Ensure the identifier is unique; otherwise, an error message will appear.

- **Status:** Select the status of the navigation menu. Click the field and select "**Active**" to publish it on the front end.

  Select "**Inactive**" to temporarily hide the navigation menu from the front end. All the items linked to it will also be hidden from the front end.

Once done, click **Save changes**.

This will direct you to the next tab, which is the primary language tab (English tab).

English tab

This is the primary language tab, and completing this tab is mandatory for publishing the navigation menu on the platform.

Since English is set as the primary language, this tab is labeled **English**.

Review/update the following:

- **Title*:** Review/Edit the title of the navigation menu.

  This name is displayed as the heading for the two footer navigation menus (as shown below).

  However, it is not displayed for the top header menu and footer bottom menu, as these menus do not have headings.

- **Auto-translate into other languages:** Check mark this to automatically update the secondary language(s) data. The data in the subsequent language tab(s) will be auto-filled.

  This feature is available only if the [Microsoft text translator API](#) is configured under Settings > System configurations > [Third-party APIs](#).

  If you prefer to manually fill in the secondary language(s) data, leave the checkbox unselected.

Once done, click **Save changes.**

<u>**DISCLAIMER:**</u> The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

The next tab(s) will be the secondary language tab(s) (Arabic, Spanish, etc.), which include the same fields as the English tab.

*If you had selected the auto-translate option, the secondary language tab(s) will be prefilled. Review the data, make any necessary edits, click **Save changes**, and close the form.*

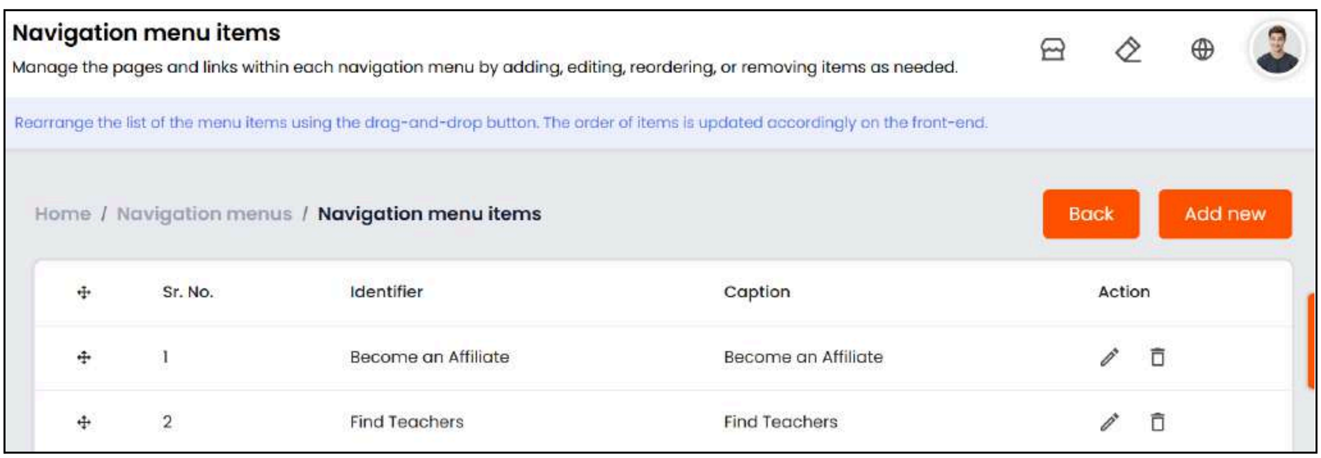
*If you did not use the auto-translate feature earlier, use the **Auto-translate & fill language data** button beside the **Save changes** button on each secondary language tab to auto-fill the secondary language fields. Then, click **Save changes**, and move to the next tab, or close the form.*

*If you do not want to fill the secondary language tab(s) at this time, complete only the primary language tab (English tab), click **Save changes**, and close the form.*

After updating all necessary fields, click in the upper-right corner of the form.

ii. Navigation menu items

Click to edit and manage all web pages linked to the selected navigation menu. This will redirect you to the **Navigation menu items** page.



The list will be empty if you just bought the platform and didn't choose to have dummy content provided by FATbit during the platform installation.

Manage the navigation menu items list

Each entry in the list includes the following details and provides options for management including:

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

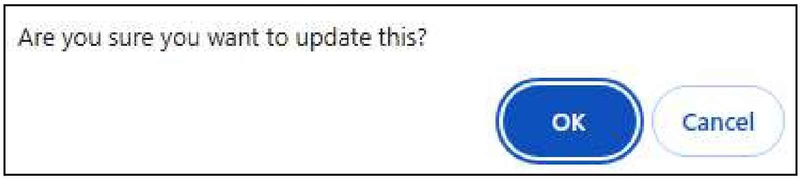
- **Drag-and-drop ✥:** Click this next to a menu item to move it up or down the list, and the serial numbers will automatically update to reflect the new sequence.

  The menu item will appear on the front end in the same order as they are arranged under their respective navigation menus.

- **Sr. no:** Serial number.
- **Identifier:** The content block's system identifier, used to save data in the system and not displayed anywhere on the platform.
- **Title:** The navigation menu title displayed on the front end, except for the header bar menu.
- **Status:** Edit the status (activate or deactivate) of a navigation menu as per your requirements using the toggle switch beside it, under the status column.

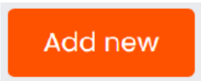
  Turn **on** the toggle switch beside the navigation menu to activate it. Leave this **off** or turn it **off** to deactivate the navigation menu, and the menu will be removed from the front end, along with **all** its menu items.

  A warning dialog box will appear for both actions, asking if you want to update the status or not.



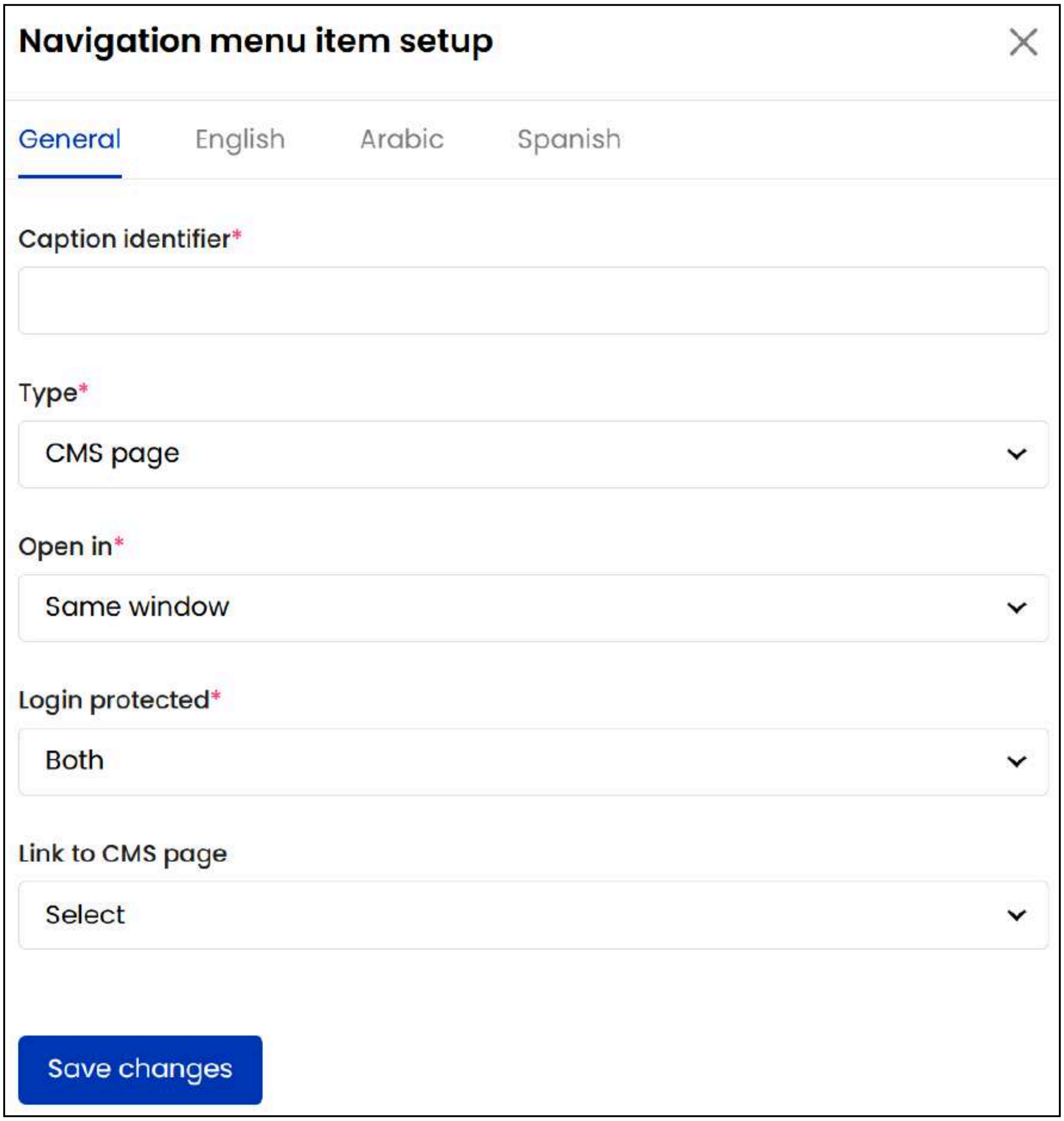
  Click **Ok** to delete it or **Cancel** to abort the action.

Add a navigation menu item

Click 

in the upper-right corner of the page to open the **Navigation menu item setup** form.

<u>**DISCLAIMER:**</u> The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.



This form contains multiple tabs: the General tab, followed by the Primary language tab.

After that, you'll find the Secondary language tabs, corresponding to the languages available on your platform.

Let's start with the **General tab**.

General tab

Update the following:

- **Caption identifier*:** Edit the unique caption identifier of the menu item.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

It can match the navigation menu item caption, as defined under the Language data tabs (e.g., English, Arabic, Spanish).

The identifier is used to save data in the system and will not be displayed anywhere on the platform. Ensure the identifier is unique; otherwise, an error message will appear.

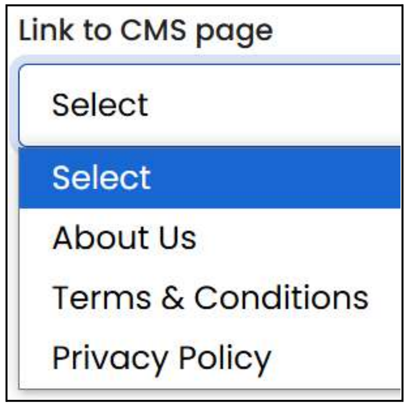
- **Type*:** Select the type of page to link to this navigation menu by clicking the field to open a dropdown list with the following options:
    - **CMS page:** Select this option to link a CMS page (created under **CMS >** Content pages). If this option is selected, the **Link to CMS page** field will be displayed as the last field.
    - **External page:** Select this option to add an external page, including any non-CMS page from the website or a page from an external website. If selected, the **External page** field will be displayed as the last field instead.
- **Open in*:** Click the field and select where you want the URL to open when clicked from the following options:
    - **Same window:** Select this if you want the link to open in the same window.
    - **New window:** Select this if you want the link to open in a new window.
- **Login protected*:** Define whether users must be logged in to view the page or not, by clicking the field and selecting one of the following options:
    - **Both:** Select this to allow all users to view the page, whether they are logged in or not.
    - **Yes:** Select this to restrict access to only logged-in users.
    - **No:** Select this to make the page accessible to everyone, regardless of login status.

*The last field lets you specify the **CMS page** or **External page** (based on your selection under the **Type** field) that will open when users click the corresponding caption under the navigation menu.*

- **Link to CMS page:** If **CMS page** is selected in the **Type** field, this field appears.

  Click the field and select a **CMS page to link** from the available options, which include only the Content pages added by you to the platform.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.



- **External page:** If you selected **External page** in the **Type*** field above, this field will be visible.

Enter the external page URL, which can be any of the following:

  - **A URL of another website**: Enter the full URL, including the security certificate (**https**).
  - **A URL from within the platform**: Enter the existing URL as it is.
  - **A new URL that is a part of the platform**: If the page does not already exist but can be created, enter the expected URL.

    For example, to create a page that displays all featured products (assuming it has not already been created for any navigation bars), enter: *{domain}teachers*

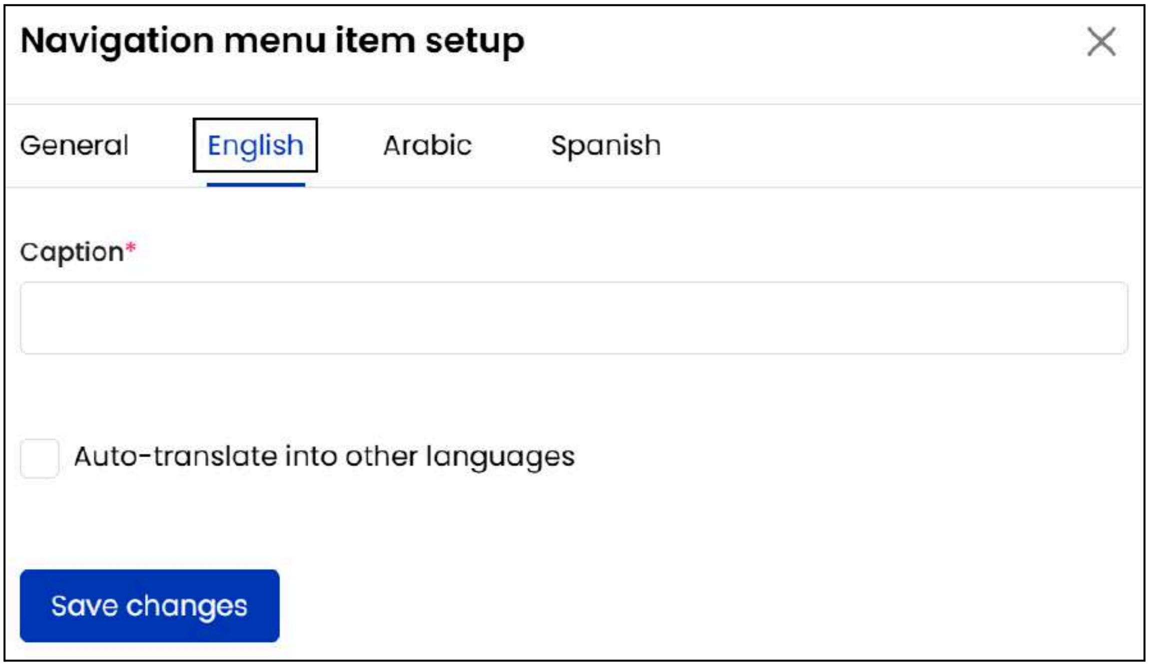
    Connect with the FATbit support team for further help.

Once done, click **Save changes**.

This will direct you to the next tab, which is the primary language tab (English tab).

English tab

This is the primary language tab, and completing this tab is mandatory for publishing the navigation menu item on the platform. Since English is set as the primary language, this tab is labeled **English**.



Update the following:

- **Caption*:** Edit the caption of the navigation menu item.

  This will appear as the item's name on the front end, and clicking it will direct users to the linked web page.

- **Auto-translate into other languages:** Check mark this to automatically update the secondary language(s) data. The data in the subsequent language tab(s) will be auto-filled.

  *This feature is available only if the Microsoft text translator API is configured under **Settings > System configurations >** Third-party APIs.*

  If you prefer to manually fill in the secondary language(s) data, leave the checkbox unselected.

Once done, click **Save changes**. The next tab(s) will be the secondary language tab(s) (Arabic, Spanish, etc.), which include the same fields as the English tab.

*If you had selected the auto-translate option, the secondary language tab(s) will be prefilled. Review the data, make any necessary edits, click **Save changes**, and close the form.*

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

*If you did not use the auto-translate feature earlier, use the **Auto-translate & fill language data** button beside the **Save changes** button on each secondary language tab to auto-fill the secondary language fields. Then, click **Save changes**, and move to the next tab, or close the form.*

*If you do not want to fill the secondary language tab(s) at this time, complete only the primary language tab (English tab), click **Save changes**, and close the form.*

After updating all necessary fields, click in the upper-right corner of the form.

Action buttons

Under the **Action** column, each entry includes two action buttons, allowing you to perform specific actions.

The functions of each button are explained in detail below:

i. Edit

Click this to edit the navigation menu item's details. The [Navigation menu item setup] form will appear.

Update the fields, then click **Save changes**.

To close the form, click in the upper-right corner.

ii. Delete

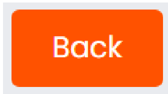
Click this to delete the navigation menu item from the system.

A confirmation message will appear.

Click **OK** to confirm the action or **Cancel** to abort it.

Go back to the navigation menu page

Once all pages are set up under the respective navigation menu, return to the **Navigation menus** page.

To do this, click 

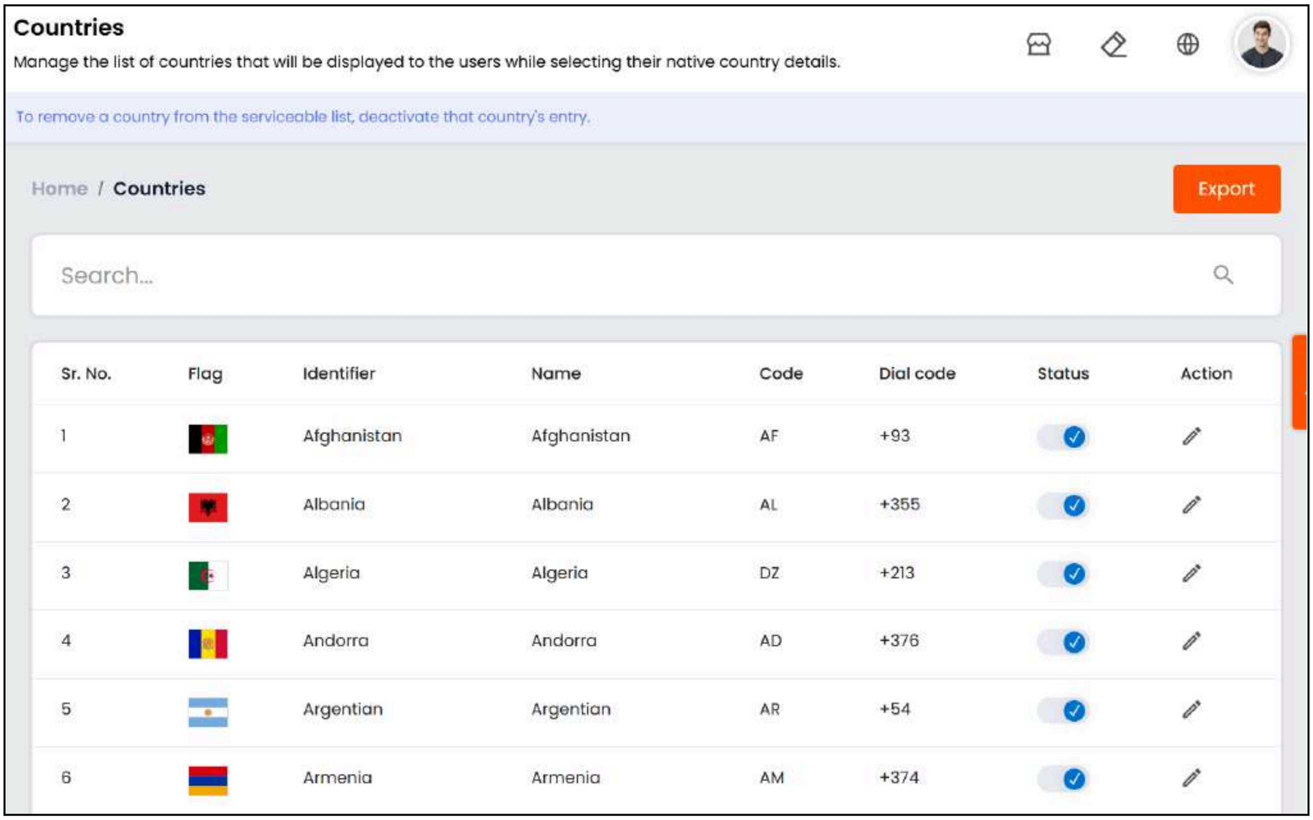
, or select **Navigation menu** from the breadcrumbs.

Alternatively, access the **Navigation menuS** page by selecting the submodule from the navigation panel.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

10.5 Countries

Manage the list of countries on the platform.



This list includes all countries by default or will include the countries you requested the team to add during the product setup.

You cannot add or delete any country. To define the list of countries for your product, kindly connect with the FATbit support team.

To exclude a country from your platform, deactivate it.

Only active countries will appear across the platform.

Active countries are used in various areas, including teacher listing filters, during user registration, and address addition.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

Manage the countries list

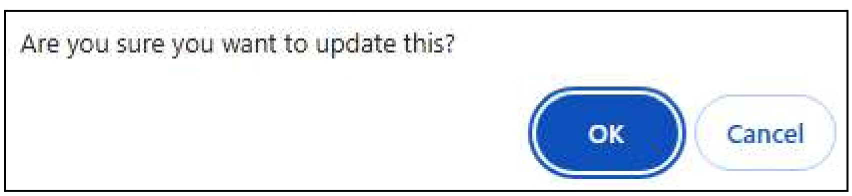
Each entry in the list includes the following details and provides options for management including:

- **Sr. no:** Serial number.
- **Flag:** An image of the country's flag.
- **Identifier:** The country's unique system identifier.
- **Name:** The name of the country.
- **Code:** The universal two-character country code of the country.
- **Dial code:** The universal dialing code of the country.
- **Status:** Edit the status (activate or deactivate) of a country as per your requirements using the toggle switch beside it, under the status column.

  Turn **on** the toggle switch beside the country to activate it.

  Leave this **off** or turn it **off** to deactivate the country.

  A warning dialog box will appear for both actions, asking if you want to update the status or not.



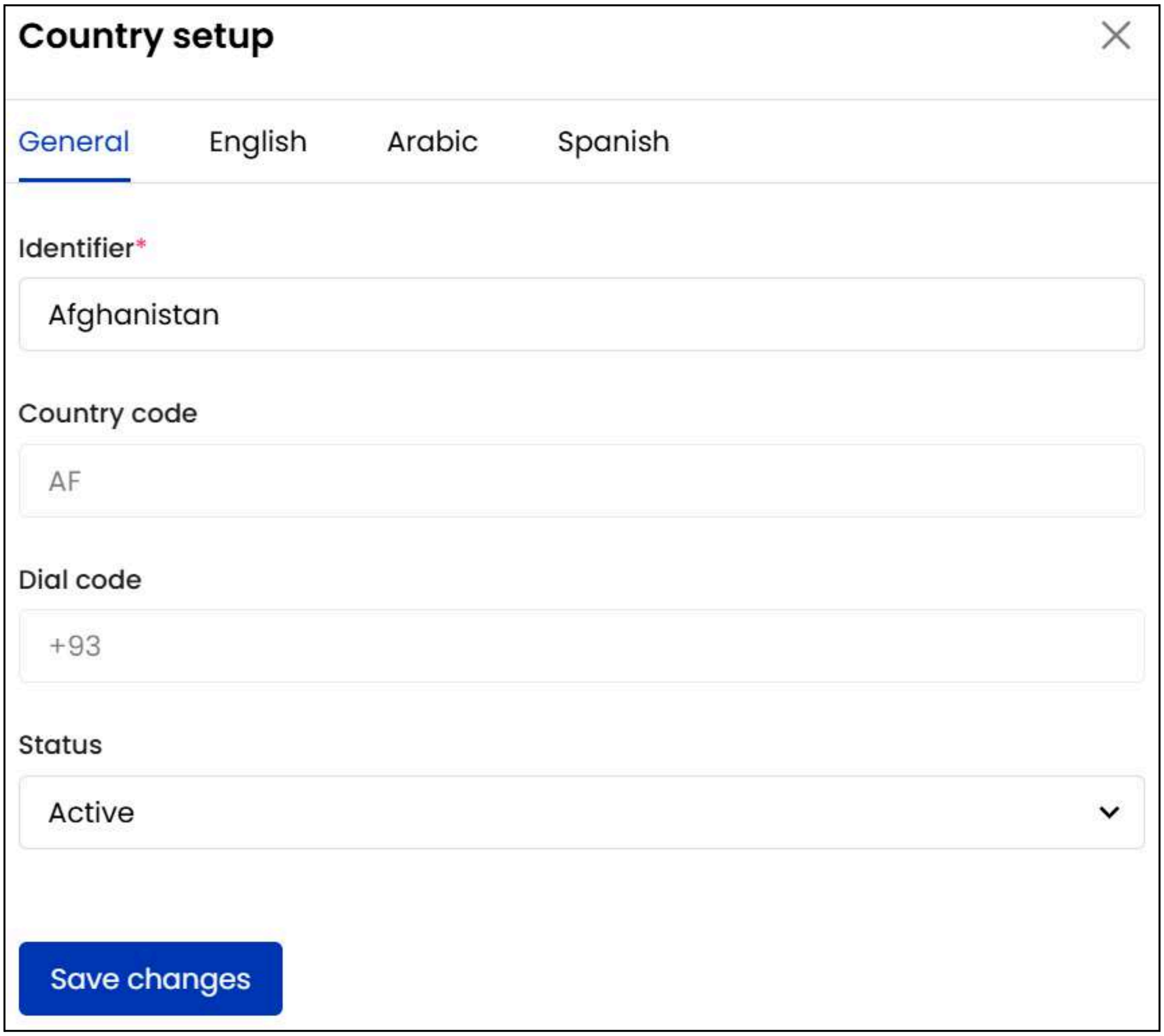
  Click **Ok** to delete it or **Cancel** to abort the action.

Action button

There is a single action button next to each entry—**Edit** .

Click this to open the **Country setup** form and edit the country's details.

<u>**DISCLAIMER:**</u> The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.



This form contains multiple tabs: the [General](#) tab, followed by the [Primary language](#) tab.

After that, you'll find the [Secondary language](#) tabs, corresponding to the languages available on your platform.

Let's start with the **General tab**.

General tab

Review/update the following:

- **Identifier*:** Review/Edit the unique country identifier.

  It can match the country name, as defined under the Language data tabs (e.g., English, Arabic, Spanish).

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

The identifier is used to save data in the system and will not be displayed anywhere on the platform. Ensure the identifier is unique; otherwise, an error message will appear.

- **Country code:** Review/Edit the universal two-character country code.
- **Dial code:** Review/Edit the phone code of the country.
- **Status:** Update the status of the country. Click the field and select "**Active**" to publish it on the front end.

  Select "**Inactive**" to temporarily hide the country from the front end.

Once done, click **Save changes**.

This will direct you to the next tab, which is the primary language tab (English tab).

English tab

This is the primary language tab, and completing this tab is mandatory for publishing the country on the platform.

Since English is set as the primary language, this tab is labeled **English**.

Review/Update the following:

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

- **Country name*:** Review/Edit the country's name in the primary language. This name will appear across all relevant areas on the platform.
- **Auto-translate into other languages:** Check mark this to automatically update the secondary language(s) data. The data in the subsequent language tab(s) will be auto-filled.

  *This feature is available only if the **Microsoft translator API** is configured under **Settings > System configurations > Third-party APIs**.*

  If you prefer to manually fill in the secondary language(s) data, leave the checkbox unselected.

Once done, click **Save changes**.

The next tab(s) will be the secondary language tab(s) (Arabic, Spanish, etc.), which include the same fields as the English tab.

*If you had selected the auto-translate option, the secondary language tab(s) will be prefilled. Review the data, make any necessary edits, click **Save changes**, and close the form.*

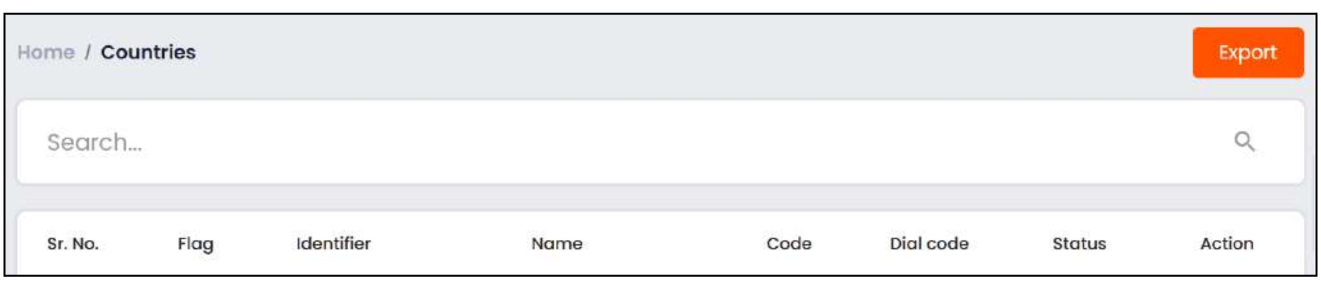
*If you did not use the auto-translate feature earlier, use the **Auto-translate & fill language data** button beside the **Save changes** button on each secondary language tab to auto-fill the secondary language fields. Then, click **Save changes**, and move to the next tab, or close the form.*

*If you do not want to fill the secondary language tab(s) at this time, complete only the primary language tab (English tab), click **Save changes**, and close the form.*

After updating all necessary fields, click ✕ in the upper-right corner of the form.

Search for a country

Use the search functionality at the top of the list to find a specific country.



DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

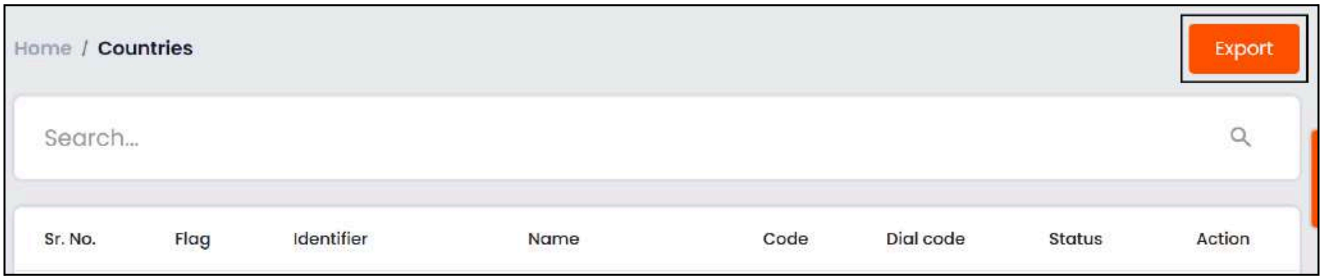
Click the search bar or to expand it. Click or the search bar again to collapse the section.

Enter the country in the **keyword** field and click **Search** to get the results.

Click **Clear search** to reset the field and start a new search.

Export countries data

To export the countries data from this page, click **Export** from the upper-right corner.



The data will be downloaded as a `.csv` file (Comma-Separated Values), which can be used for backups or external purposes.

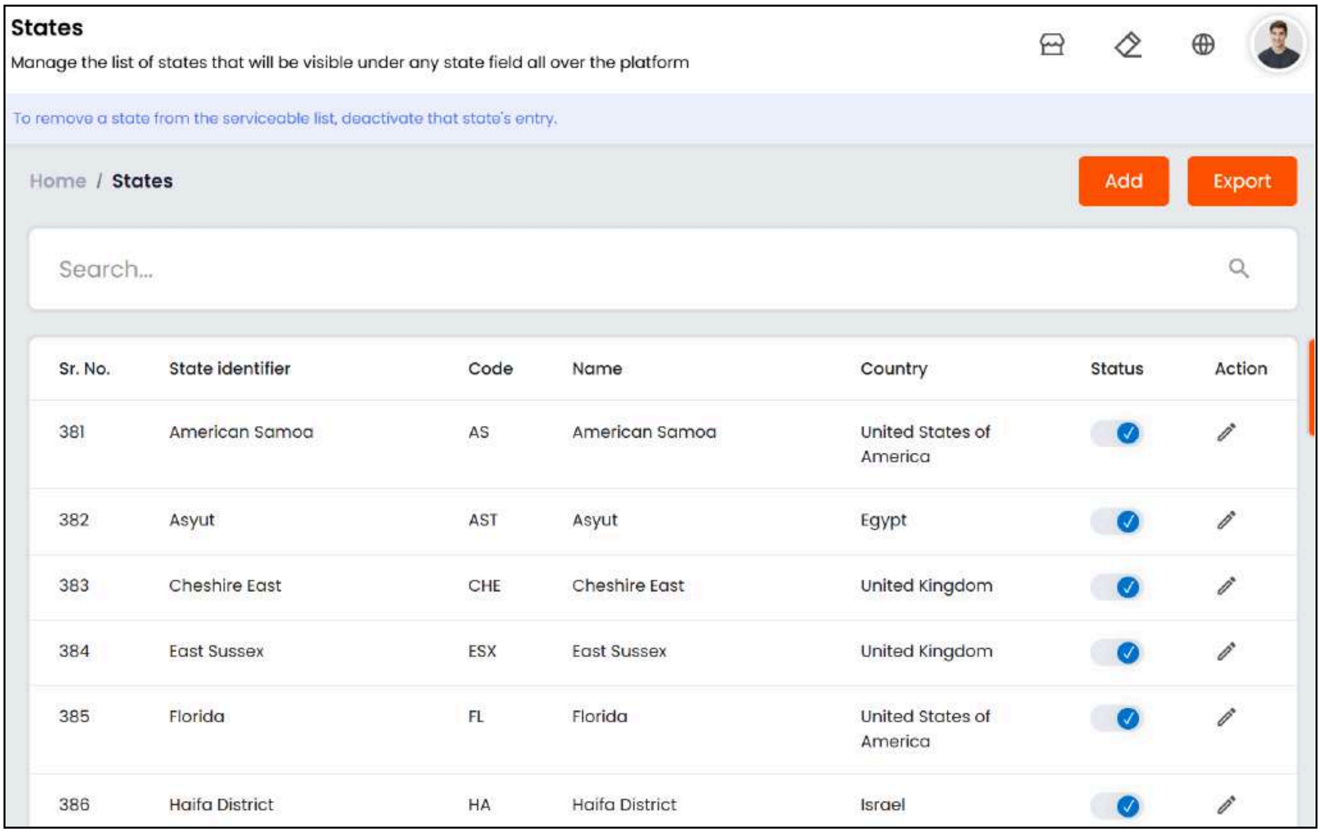
A success message will appear once the download is complete.

<u>**DISCLAIMER:**</u> The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

10.6 States

Manage the list of states for all active countries on the platform. This list comes prefilled with all the states for every active country on the platform.

Manage the active countries list under **CMS** > Countries.



A state can be added to the list but cannot be deleted. If you want to exclude a state from the platform, deactivate it and it will be removed from the platform.

Only active states will appear across the platform and will be used in various areas, including teacher listing filters, during user registration, and address addition.

Manage the states list

Each entry in the list includes the following details and provides options for management including:

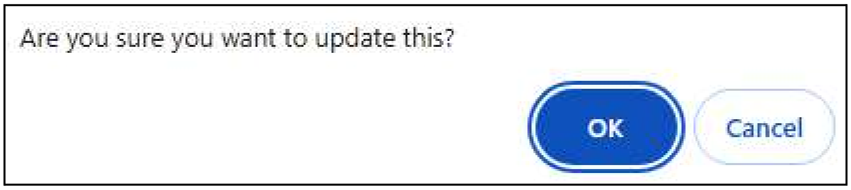
<u>**DISCLAIMER:**</u> The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

- **Sr. no:** Serial number.
- **State identifier:** The state's unique system identifier.
- **Code:** The state code.
- **Name:** The name of the state.
- **Country:** The name of the country to which the state belongs.
- **Status:** Edit the status (activate or deactivate) of a state as per your requirements using the toggle switch beside it, under the status column.

Turn **on**  the toggle switch beside the state to activate it.

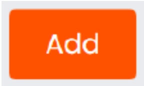
Leave this **off** or turn it **off** to deactivate the state.

A warning dialog box will appear for both actions, asking if you want to update the status or not.



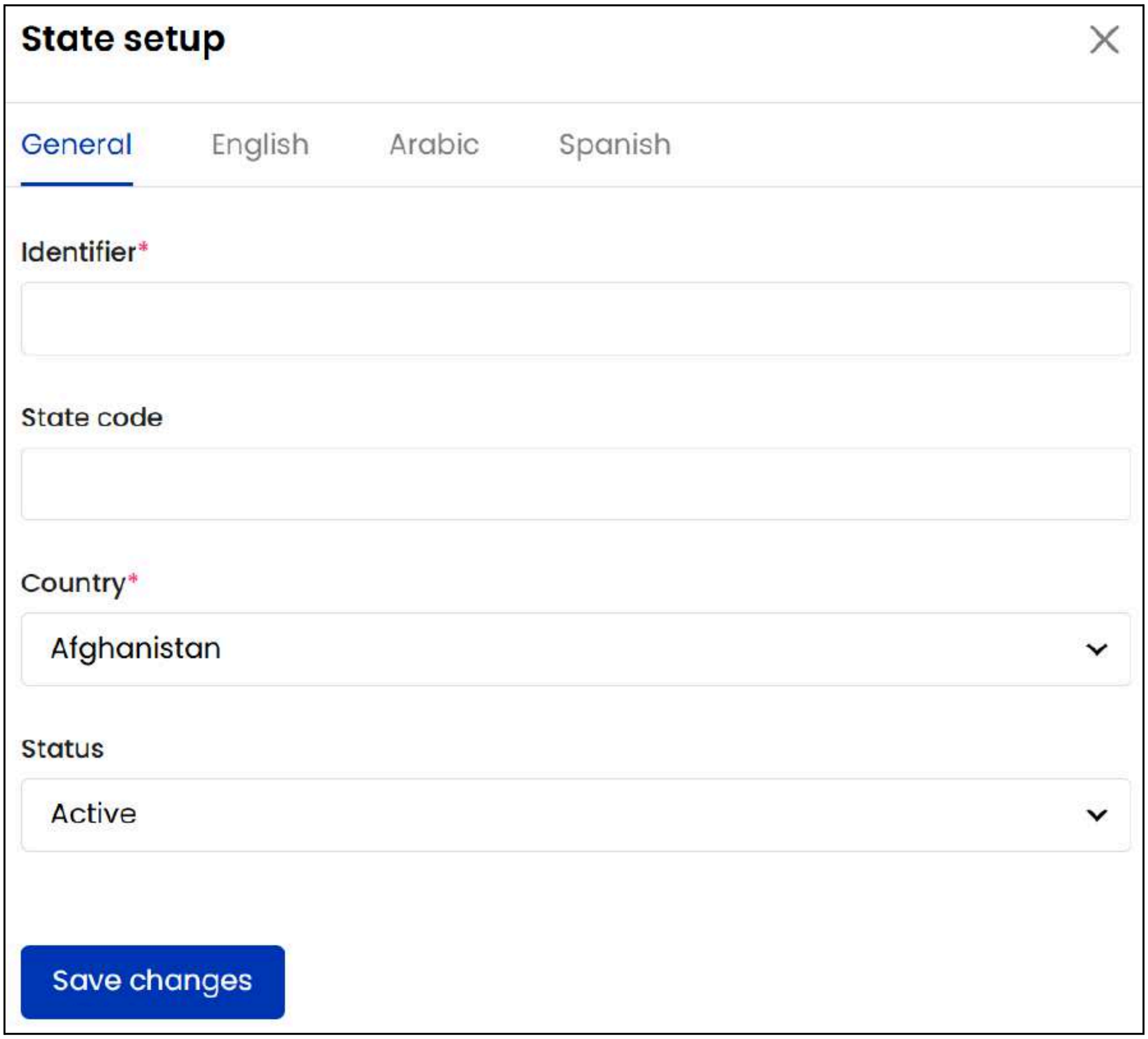
Click **Ok** to delete it or **Cancel** to abort the action.

Add a state

Click 

in the upper-right corner of the page to open the **State setup** form.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.



This form contains multiple tabs: the General tab, followed by the Primary language tab.

After that, you'll find the Secondary language tabs, corresponding to the languages available on your platform.

Let's start with the **General tab**.

General tab

Update the following:

- **Identifier*:** Enter the unique state identifier.

  It can match the state name, as defined under the Language data tabs (e.g., English, Arabic, Spanish).

The identifier is used to save data in the system and will not be displayed anywhere on the platform. Ensure the identifier is unique; otherwise, an error message will appear.

- **State code:** Enter the state code.
- **Country:** Select the country this state belongs to.

  To do this, click the list and select the country from the dropdown list.

  If the country is not available in the list, it might have been deactivated or is not in the list. Manage the countries list under ***CMS > Countries***.

- **Status:** Select the status of the state. Click the field and select "**Active**" to publish it on the front end.

  Select "**Inactive**" to temporarily hide the state from the front end.

Once done, click **Save changes**. This will direct you to the next tab, which is the primary language tab (English tab).

English tab

This is the primary language tab, and completing this tab is mandatory for publishing the state on the platform.

Since English is set as the primary language, this tab is labeled **English**.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

Update the following:

- **State name*:** Enter the state's name in the primary language. This name will appear across all relevant areas on the platform.
- **Auto-translate into other languages:** Check mark this to automatically update the secondary language(s) data. The data in the subsequent language tab(s) will be auto-filled.

  *This feature is available only if the [Microsoft text translator API](#) is configured under **Settings > System configurations >** [**Third-party APIs**](#).*

  If you prefer to manually fill in the secondary language(s) data, leave the checkbox unselected.

Once done, click **Save changes**.

The next tab(s) will be the secondary language tab(s) (Arabic, Spanish, etc.), which include the same fields as the English tab.

*If you had selected the auto-translate option, the secondary language tab(s) will be prefilled. Review the data, make any necessary edits, click **Save changes**, and close the form.*

*If you did not use the auto-translate feature earlier, use the **Auto-translate & fill language data** button beside the **Save changes** button on each secondary language tab to auto-fill the secondary language fields. Then, click **Save changes**, and move to the next tab, or close the form.*

*If you do not want to fill the secondary language tab(s) at this time, complete only the primary language tab (English tab), click **Save changes**, and close the form.*

After updating all necessary fields, click ✕ in the upper-right corner of the form.

Action button

There is a single action button next to each entry—**Edit** ✎.

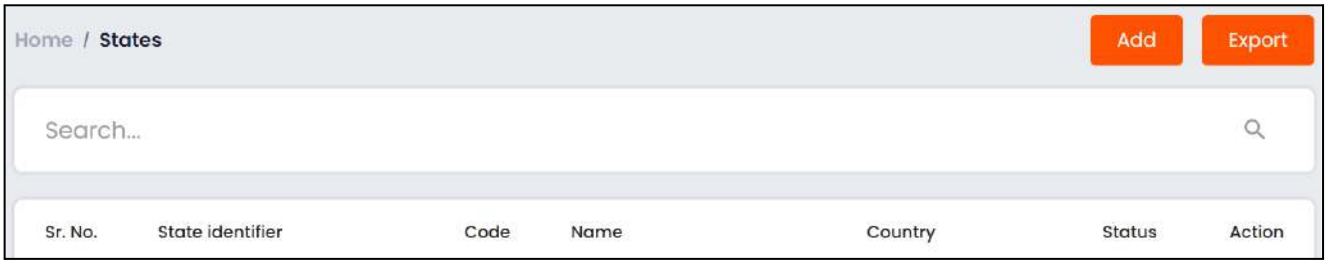
Click this to edit the state's details. The [State setup](#) form will appear.

Update the fields, then click **Save changes**.

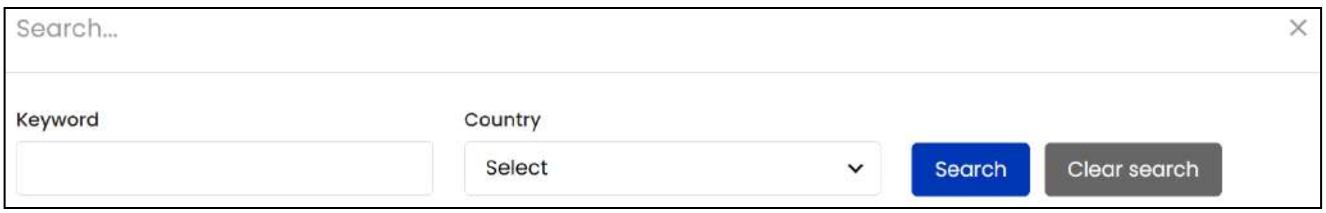
To close the form, click ✕ in the upper-right corner.

Search for a state

Use the search functionality at the top of the list to find a specific state.



Click the search bar or to expand it. Click or the search bar again to collapse the section.



There are several filters that help narrow down the search. Each field is explained below:

- **Keyword:** Enter the name of the state you are searching for in this field.
- **User type:** Select the country to which the state belongs by clicking the field and choosing from the dropdown list.

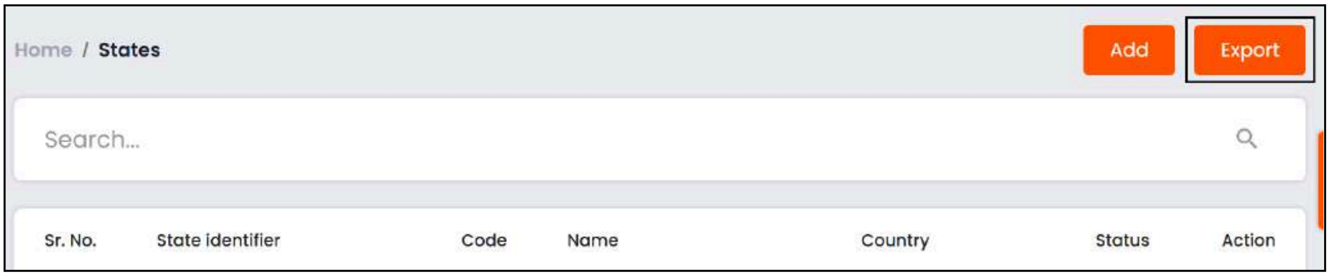
  The list includes only active countries on the platform. Manage the country list under CMS > Countries.

Search for a state by filling in a single field or both fields.

After filling in the desired fields, click **Search** to display the results. Click **Clear search** to reset all fields and start a new search.

Export states data

To export the countries data from this page, click **Export** from the upper-right corner.



The data will be downloaded as a `.csv` file (Comma-Separated Values), which can be used for backups or external purposes.

A success message will appear once the download is complete.

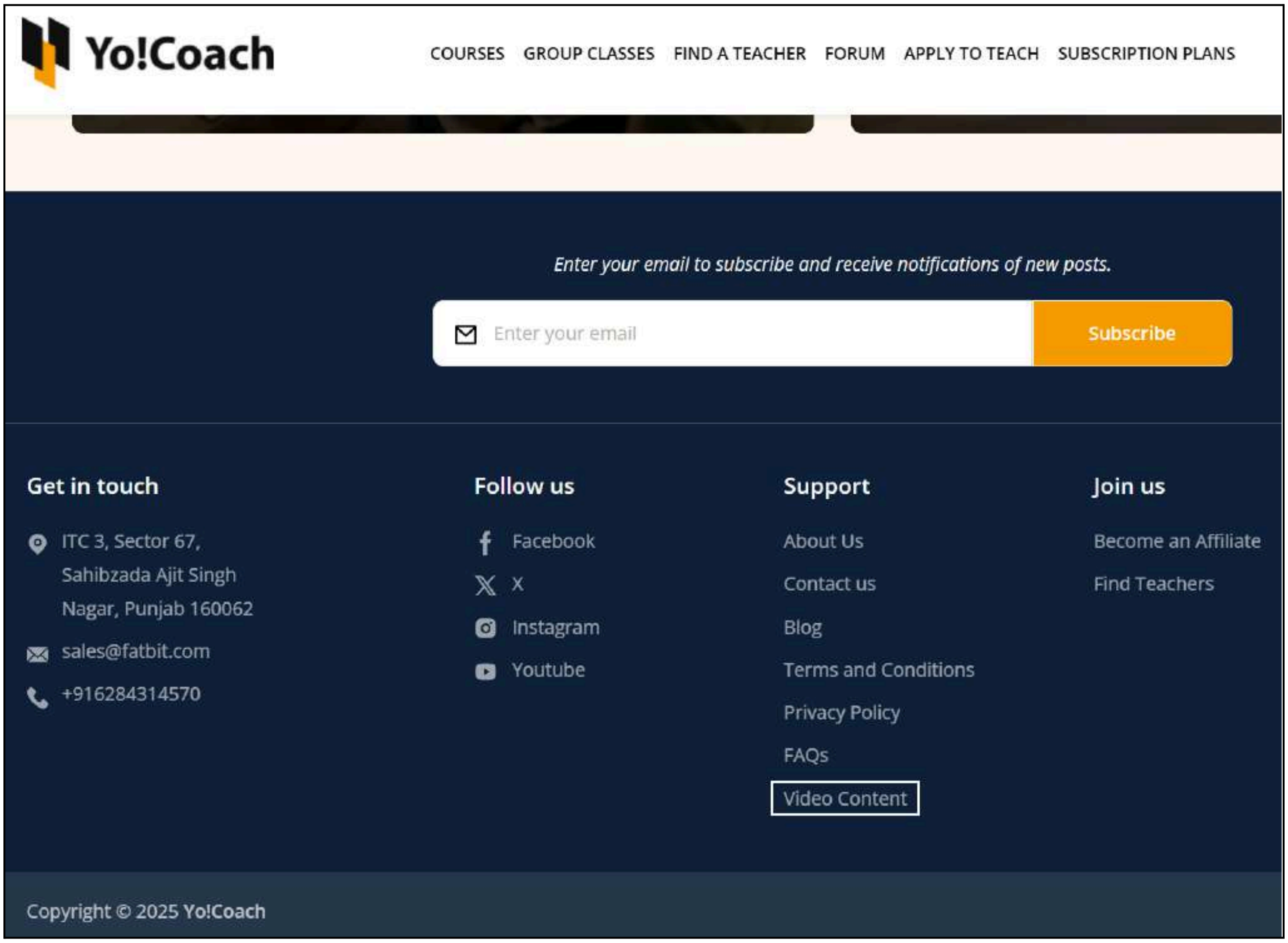
To export specific states data, use the [search bar](#) to apply the necessary filters and define the criteria.

After setting the filters and clicking **Search** to view the results, click **Export** to download the filtered data as a `.csv` file.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

10.7 Video content

Yo!Coach allows you to add instructional, tutorial, and other informational videos to the website front end to enhance user guidance and convenience. These videos can be reached from the footer section on the front end.

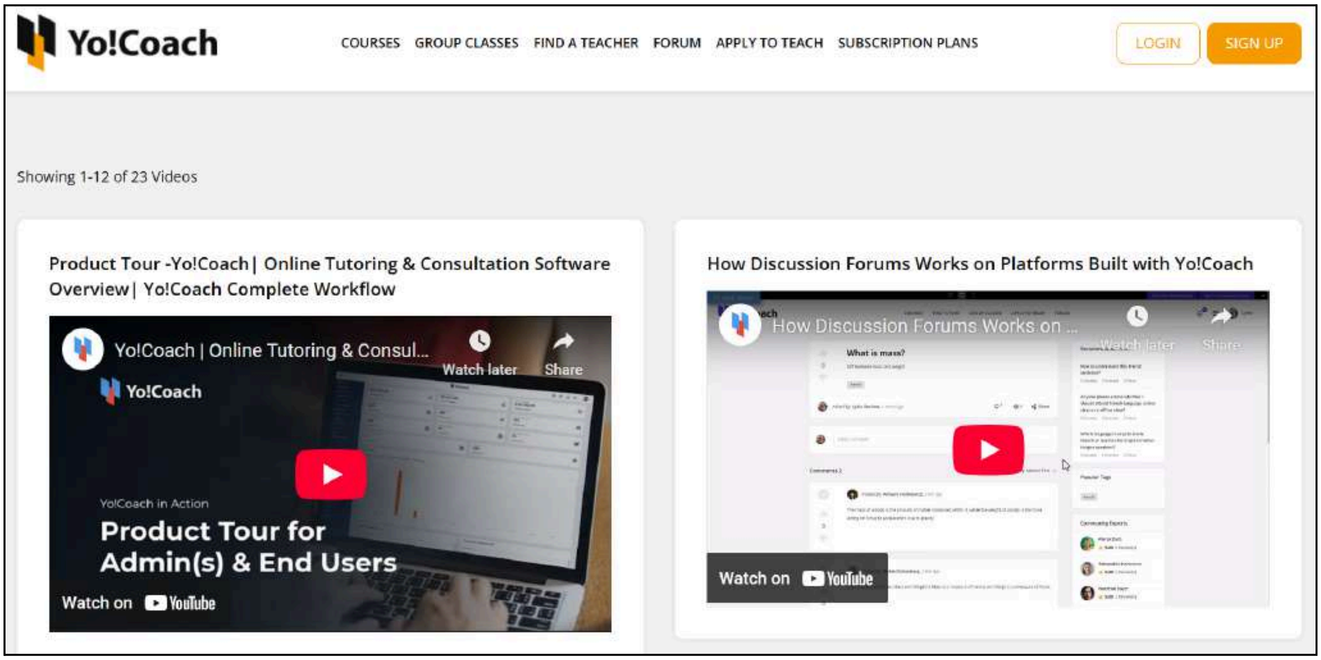


Modify and reposition the links in the footer navigation menu as needed. Since links can be moved, they may appear under a different navigation menu than what is shown in the current display.

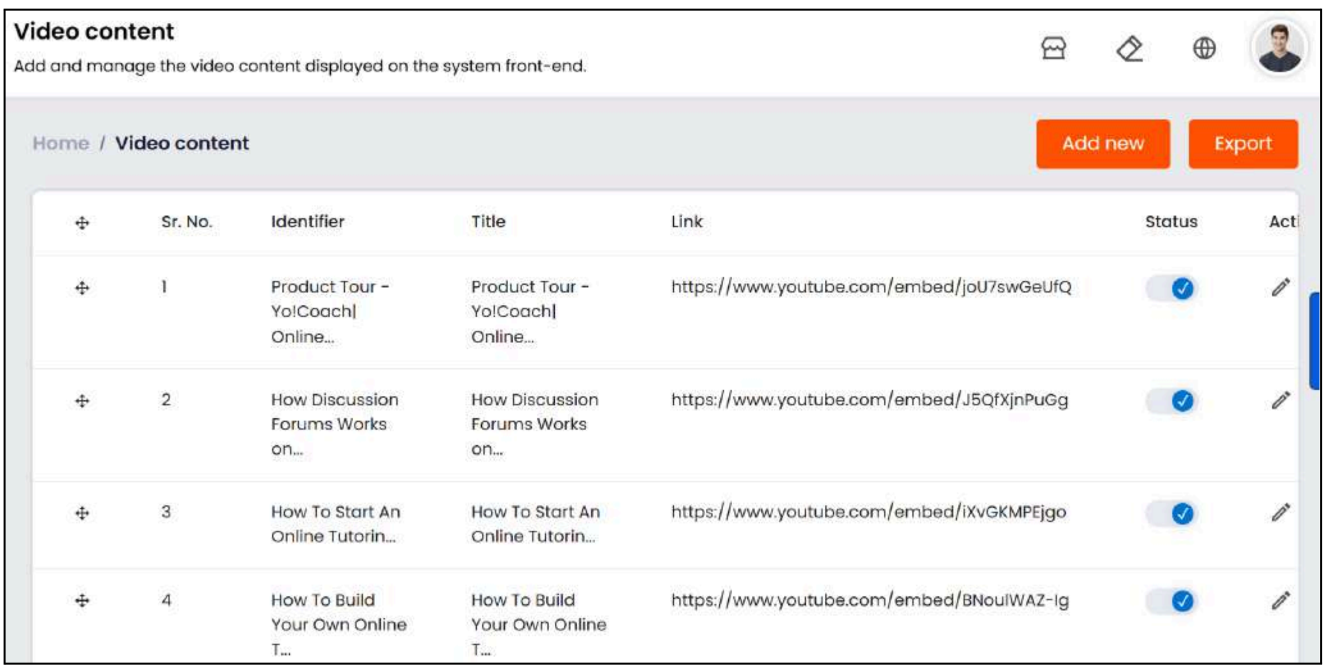
Manage these settings under **CMS >** Navigation menus.

Selecting **Video content** from the front-end navigation menu directs users to the **Video content** page.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.



Manage the list of the video content from this submodule.



The list will be empty if you recently purchased the platform and chose not to include dummy content provided by FATbit during installation.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

Manage the video content list

Each entry in the list includes the following details and provides options for management including:

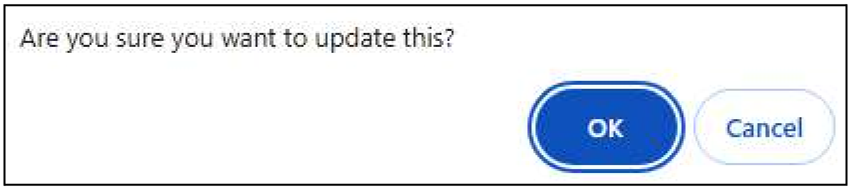
- **Drag-and-drop** **:** Click this next to a video to move it up or down the list, and the serial numbers will automatically update to reflect the new sequence.

  The videos will appear on the front end in the same order as they are arranged on this page.

- **Sr. no:** Serial number.
- **Identifier:** The video's unique system identifier.
- **Title:** The title of the video as displayed on the front end.
- **Link:** The YouTube link of the video.
- **Status:** Edit the status (activate or deactivate) of the video as per your requirements using the toggle switch beside it, under the status column.

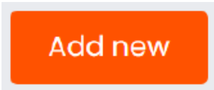
  Turn **on** the toggle switch beside the video to activate it. Leave this **off** or turn it **off** to deactivate the video, and it will be removed from the front end.

  A warning dialog box will appear for both actions, asking if you want to update the status or not.



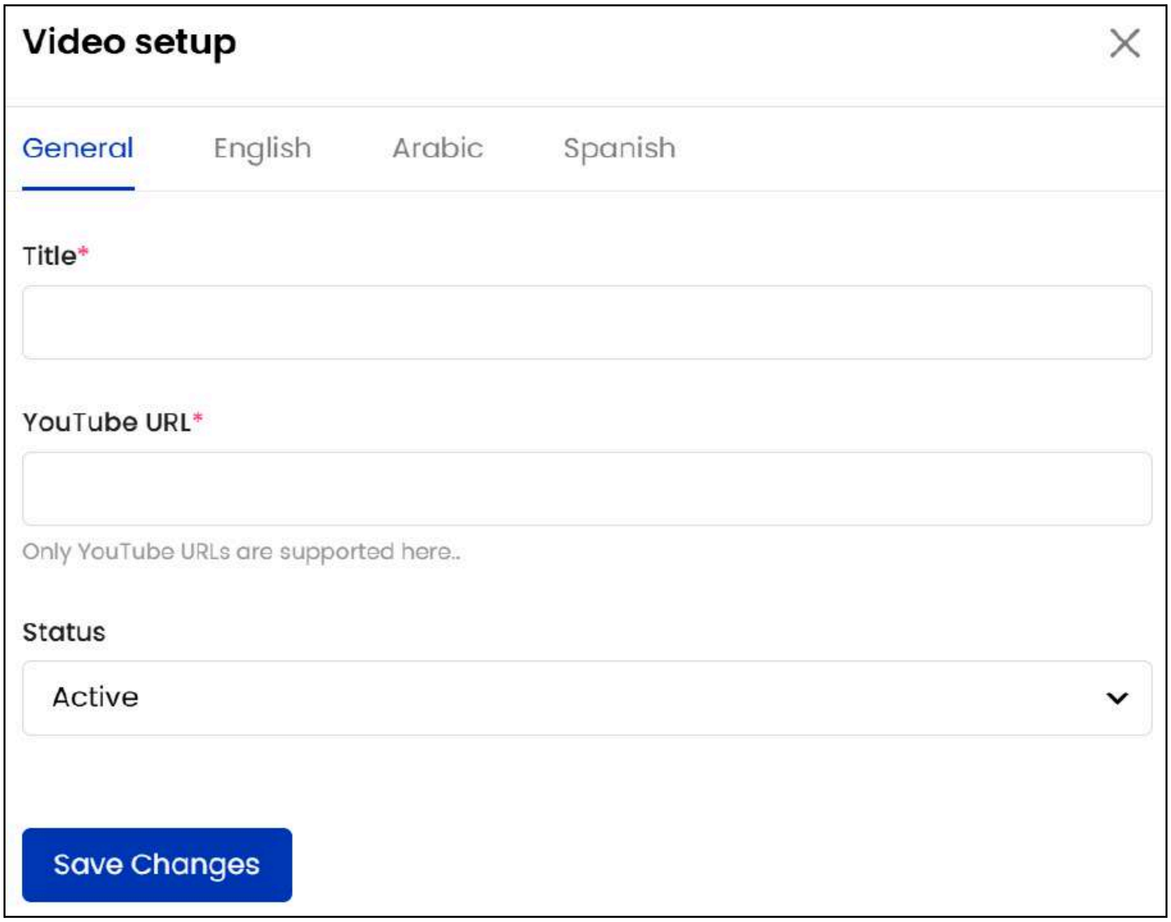
Click **Ok** to delete it or **Cancel** to abort the action.

Add a video

Click 

in the upper-right corner of the page to open the **Video setup** form.

<u>**DISCLAIMER:**</u> The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.



This form contains multiple tabs: the [General](#) tab, followed by the [Primary language](#) tab. After that, you'll find the [Secondary language](#) tabs, corresponding to the languages available on your platform.

Let's start with the **General tab**.

General tab

Update the following:

- **Title*:** Enter a unique video title that will act as the system identifier.

  It can match the video title, as defined under the Language data tabs (e.g., English, Arabic, Spanish).

  The identifier is used to save data in the system and will not be displayed anywhere on the platform. Ensure the identifier is unique; otherwise, an error message will appear.

- **YouTube URL*:** Paste the YouTube video link in this field.

  *Yo!Coach supports only YouTube video links. Ensure that you enter the full video URL, including https, for example: **https://www.youtube.com/watch?v=example**.*

- **Status:** Select the status of the video. Click the field and select "**Active**" to publish it on the front end.

  Select "**Inactive**" to temporarily hide it from the front end.

Once done, click **Save changes**.

This will direct you to the next tab, which is the primary language tab (English tab).

English tab

This is the primary language tab, and completing this tab is mandatory for publishing the video on the platform.

Since English is set as the primary language, this tab is labeled **English**.

Update the following:

- **Video title*:** Enter the video's title in the primary language.

  This name will appear on the front end of the platform along with the video.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

- **Auto-translate into other languages:** Check mark this to automatically update the secondary language(s) data. The data in the subsequent language tab(s) will be auto-filled.

  *This feature is available only if the Microsoft text translator API is configured under **Settings > System configurations >** Third-party APIs.*

  If you prefer to manually fill in the secondary language(s) data, leave the checkbox unselected.

Once done, click **Save changes**.

The next tab(s) will be the secondary language tab(s) (Arabic, Spanish, etc.), which include the same fields as the English tab.

*If you had selected the auto-translate option, the secondary language tab(s) will be prefilled. Review the data, make any necessary edits, click **Save changes**, and close the form.*

*If you did not use the auto-translate feature earlier, use the **Auto-translate & fill language data** button beside the **Save changes** button on each secondary language tab to auto-fill the secondary language fields. Then, click **Save changes**, and move to the next tab, or close the form.*

*If you do not want to fill the secondary language tab(s) at this time, complete only the primary language tab (English tab), click **Save changes**, and close the form.*

After updating all necessary fields, click ✕ in the upper-right corner of the form.

Action buttons

Under the **Action** column, each entry includes two action buttons, allowing you to perform specific actions.

The functions of each button are explained in detail below:

i. Edit

Click this to edit the video's details. The Video setup form will appear.

Update the fields, then click **Save changes**.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

To close the form, click in the upper-right corner.

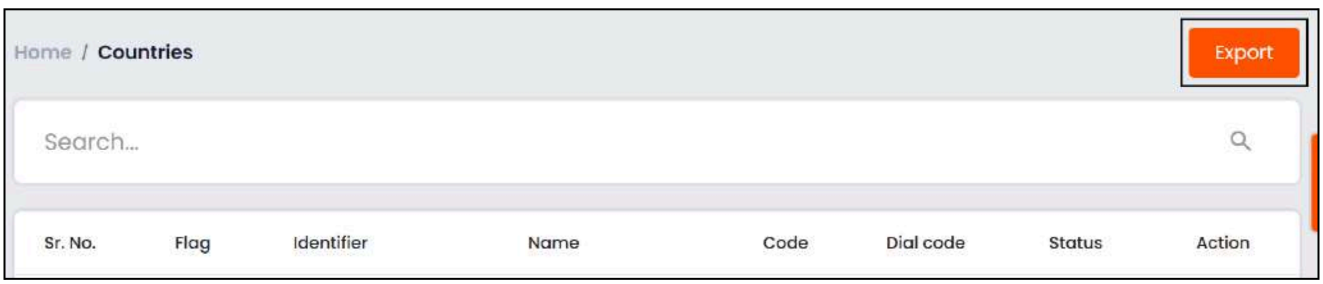
ii. Delete

Click this to delete the video from the system. A confirmation message will appear.

Click **OK** to confirm the action or **Cancel** to abort it.

Export video content data

To export the video content data from this page, click **Export** from the upper-right corner.



The data will be downloaded as a `.csv` file (Comma-Separated Values), which can be used for backups or external purposes.

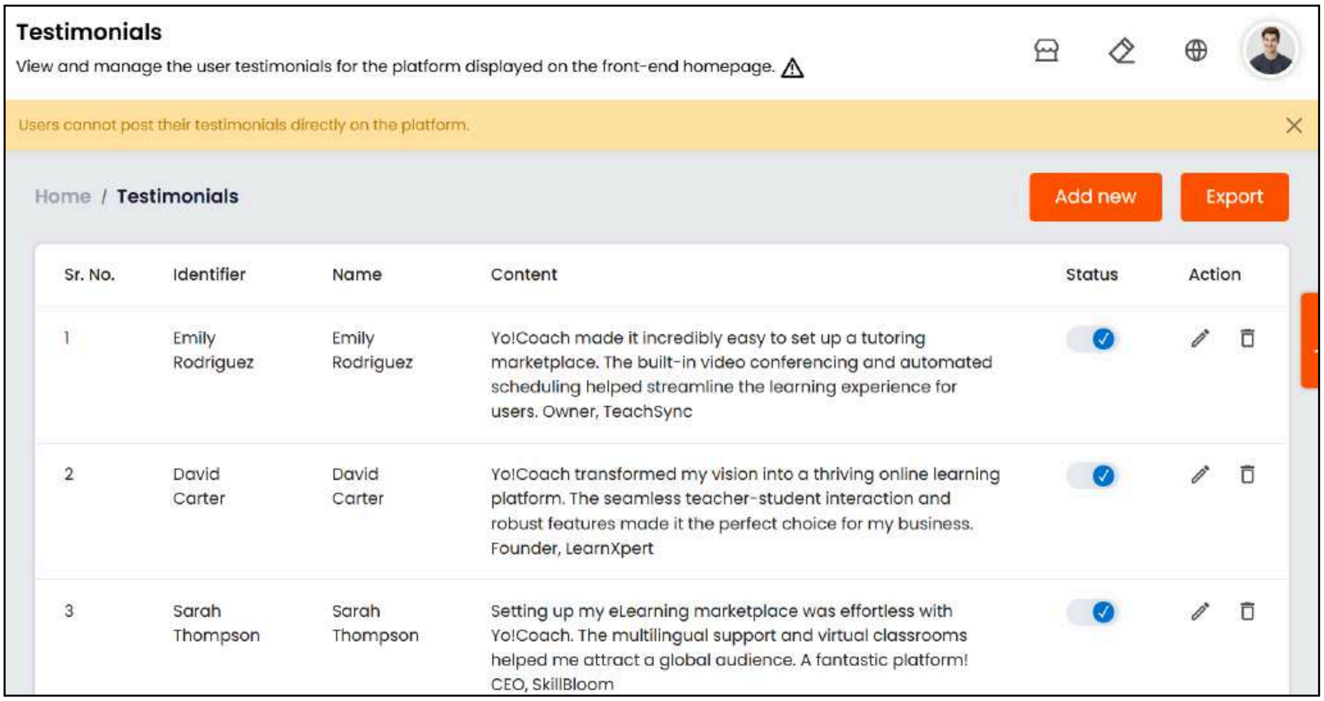
A success message will appear once the download is complete.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

10.8 Testimonials

Every eCommerce website includes a section for testimonials, reviews, and ratings to help new users assess the platform's trustworthiness.

Manage all user testimonials under this submodule.



The list will be empty if you recently purchased the platform and chose not to include dummy content provided by FATbit during installation.

Only you can add or edit the testimonials—users cannot post them directly.

If a user wants to share a testimonial, they must contact you, and then you can add it here.

The testimonials will appear on the home page under the testimonials content block (if it is active).

Only the first four active testimonials are displayed in this block, while the rest remain hidden. To ensure visibility, add only four testimonials to the list.

Manage the testimonials list

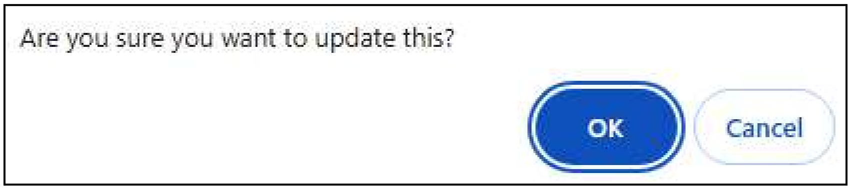
Each entry in the list includes the following details and provides options for management including:

- **Sr. no:** Serial number.
- **Identifier:** The testimonial's unique system identifier.
- **Name:** The name of the person who shared the testimony. This name is displayed on the front end.
- **Content:** The content of the testimonial.
- **Status:** Edit the status (activate or deactivate) of the testimonials as per your requirements using the toggle switch beside it, under the status column.

Turn **on**  the toggle switch beside the testimonial to activate it.

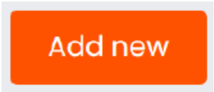
Leave this **off** or turn it **off** to deactivate the testimonial, and it will be removed from the front end.

A warning dialog box will appear for both actions, asking if you want to update the status or not.

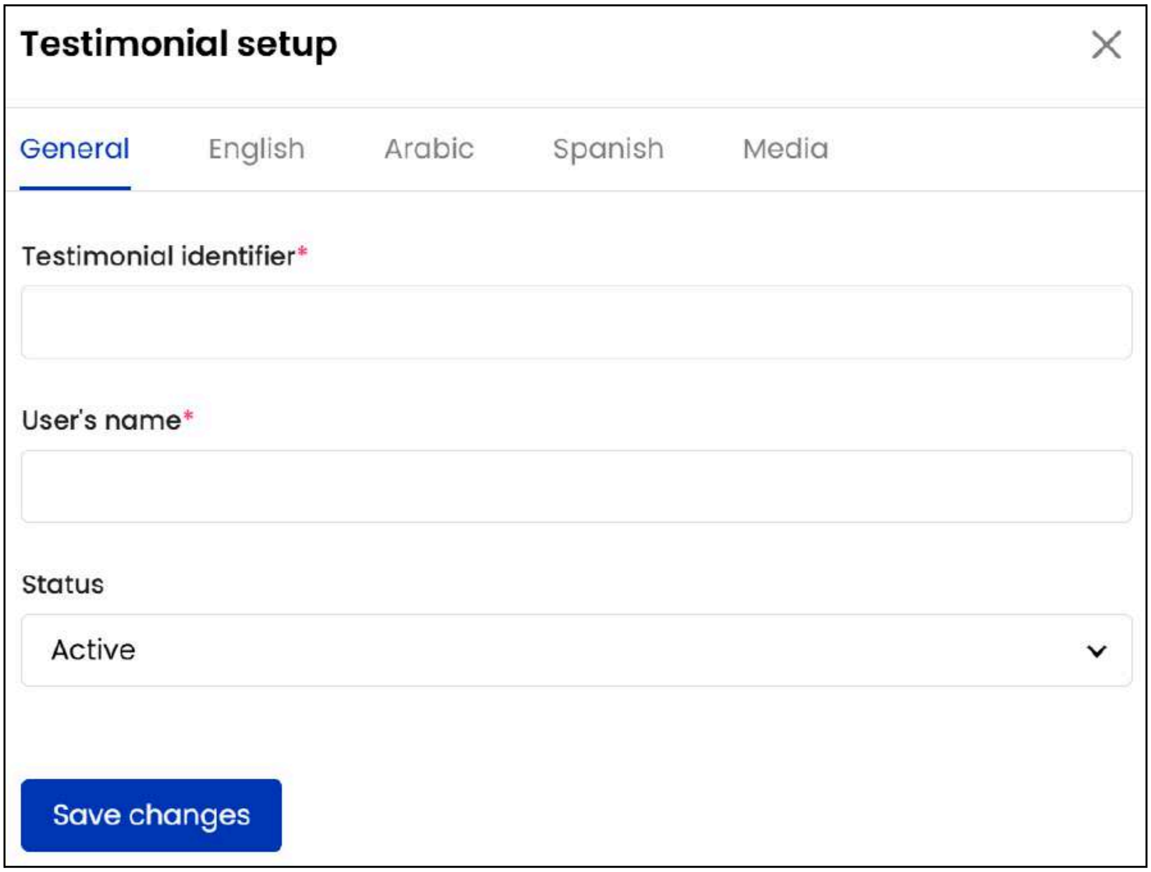


Click **Ok** to delete it or **Cancel** to abort the action.

Add a testimonial

Click 

in the upper-right corner of the page to open the **Testimonial setup** form.



This form contains multiple tabs: the General tab, followed by the Primary language tab.

After that, you'll find the Secondary language tabs, corresponding to the languages available on your platform. The last tab is the Media tab.

Let's start with the **General tab**.

General tab

Update the following:

- **Testimonial identifier*:** Enter the user's name as the testimonial identifier that will act as the system identifier.

  The identifier is used to save data in the system and will not be displayed anywhere on the platform. Ensure the identifier is unique; otherwise, an error message will appear.

- **User's name*:** Enter the name of the user who shared the respective testimonial.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

- **Status:** Select the status of the testimonial. Click the field and select "**Active**" to publish it on the front end.

  Select "**Inactive**" to temporarily hide it from the front end.

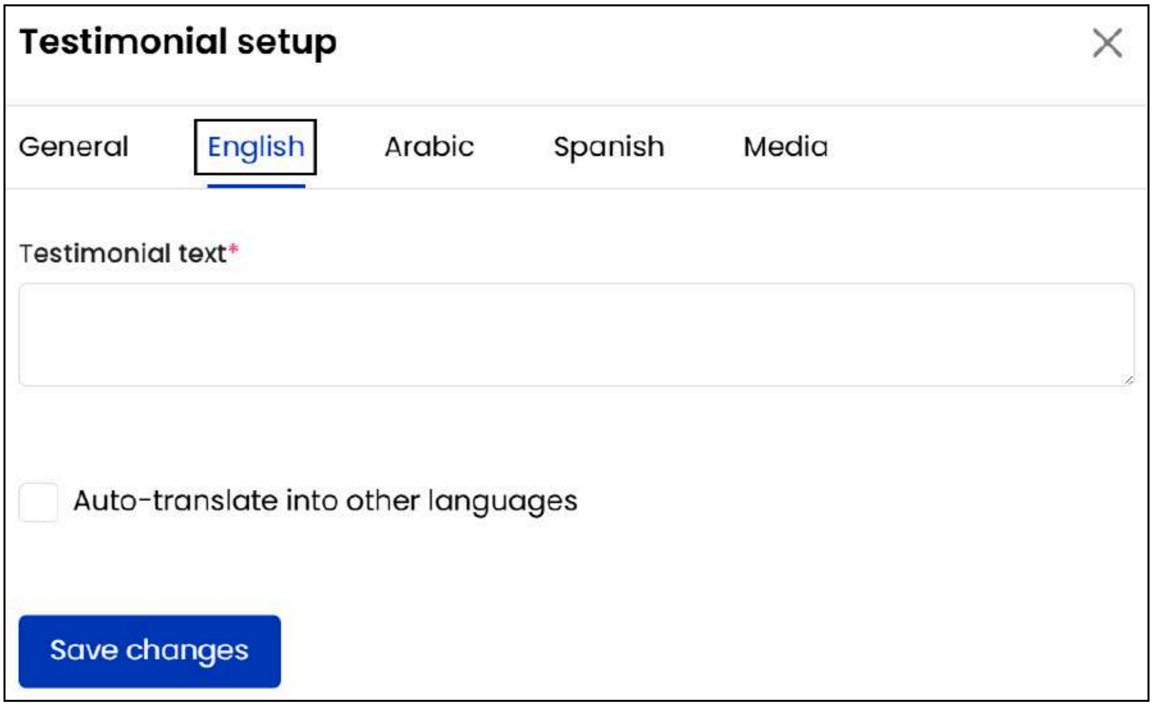
Once done, click **Save changes**.

This will direct you to the next tab, which is the primary language tab (English tab).

English tab

This is the primary language tab, and completing this tab is mandatory for publishing the testimonial on the platform.

Since English is set as the primary language, this tab is labeled **English**.



Update the following:

- **Testimonial text*:** Enter the testimony content shared by the respective user in the primary language.

  This will appear on the front end along with the user's name and their [image](#).

<u>**DISCLAIMER:**</u> The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

- **Auto-translate into other languages:** Check mark this to automatically update the secondary language(s) data. The data in the subsequent language tab(s) will be auto-filled.

  *This feature is available only if the [Microsoft text translator API]() is configured under **Settings > System configurations > [Third-party APIs]()**.*

  If you prefer to manually fill in the secondary language(s) data, leave the checkbox unselected.

Once done, click **Save changes**.

The next tab(s) will be the secondary language tab(s) (Arabic, Spanish, etc.), which include the same fields as the English tab.

*If you had selected the auto-translate option, the secondary language tab(s) will be prefilled. Review the data, make any necessary edits, click **Save changes**, and move to the [Media]() tab.*

*If you did not use the auto-translate feature earlier, use the **Auto-translate & fill language data** button beside the **Save changes** button on each secondary language tab to auto-fill the secondary language fields. Then, click **Save changes**, and move to the next tab.*

*If you do not want to fill the secondary language tab(s) at this time, complete only the primary language tab (English tab), click **Save changes**, and move to the [Media]() tab.*

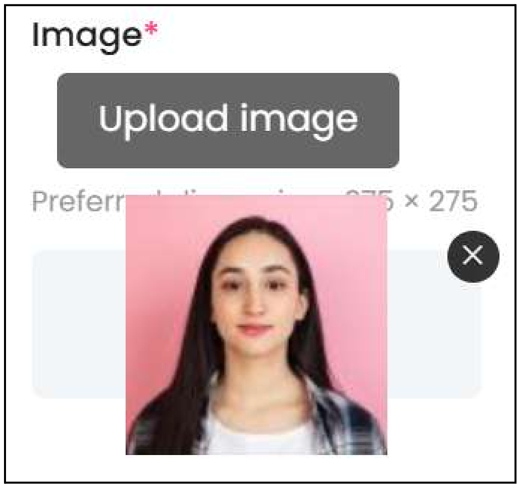
Media tab

The final tab, following all the secondary language tabs, is the **Media** tab. Click this tab to access it, and update the user's picture.

The testimonial will appear on the front end only if the user's image is updated under this tab.

To upload the image, click **Upload image**. Select the image from your system, click **Open** and it will be uploaded.

After the image is uploaded, it will appear below the button (as shown in the image below).



To change the image, use the **Upload image** button again.

To remove the image, click .

Removing the image will hide the testimonial from the front end, as only testimonials with images are published.

*When you upload the image, it is saved automatically in the system, so no **Save changes** button is provided under this tab.*

After completing the process, click  to close the form. The testimonial will then be added to the list.

Action buttons

Under the **Action** column, each entry includes two action buttons, allowing you to perform specific actions.

The functions of each button are explained in detail below:

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

i. Edit

Click this to edit the testimonial's details. The Testimonial setup form will appear.

Update the fields, then click **Save changes**. To close the form, click in the upper-right corner.

ii. Delete

Click this to delete the testimonial from the system. A confirmation message will appear.

Click **OK** to confirm the action or **Cancel** to abort it.

Export testimonials data

To export the testimonials data from this page, click **Export** from the upper-right corner.

The data will be downloaded as a `.csv` file (Comma-Separated Values), which can be used for backups or external purposes.

A success message will appear once the download is complete.

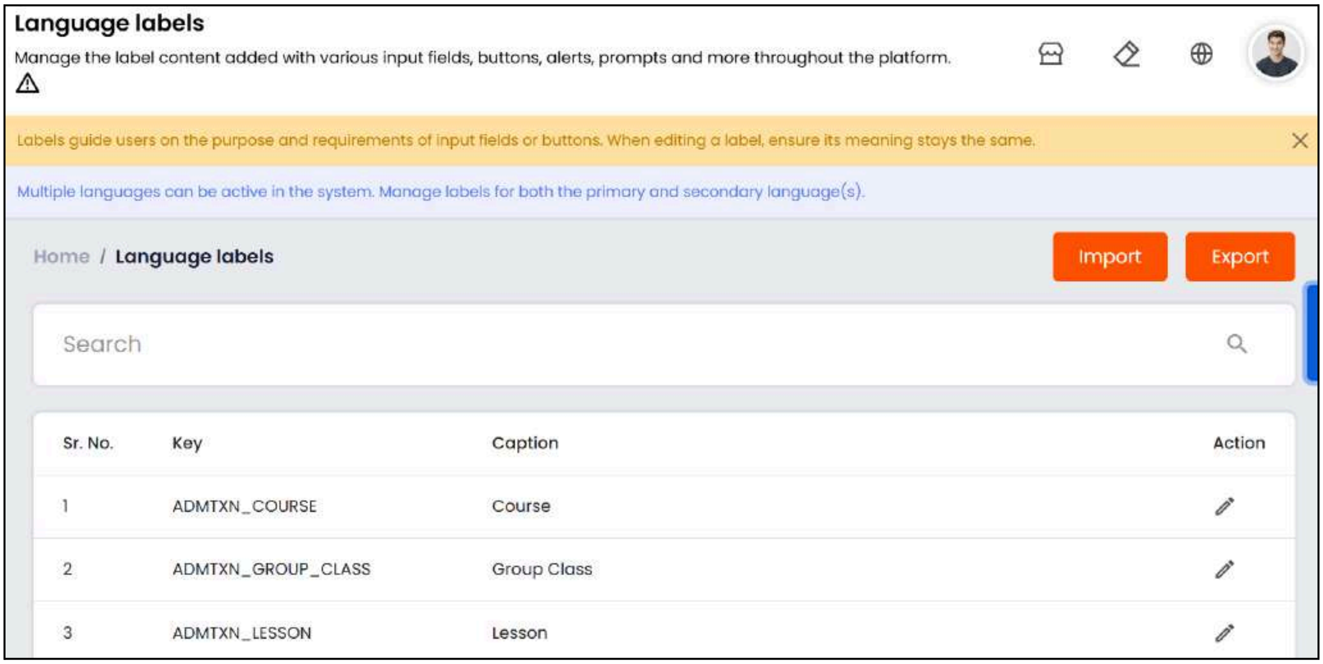
<u>**DISCLAIMER:**</u> The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

10.9 Language labels

Labels are the text or expressions used throughout the platform, including forms, tables, and buttons.

For example, the text **‘Save changes’** or **‘Update’** on a button is a label.

This page lists all the pre-configured labels used in different sections of the platform (on both the website and mobile apps).



Edit labels as needed by searching for the label and clicking the edit button next to it.

Although labels can be edited, avoid changing them unless absolutely necessary. Unnecessary changes can cause confusion since each label serves a defined function.

*For example, the ‘**Save changes**’ text on the save button defines how the button works when clicked. If you change this to something else, it will become highly confusing for you and the others who join the platform.*

Manage the language labels list

The list displays the following information for each entry:

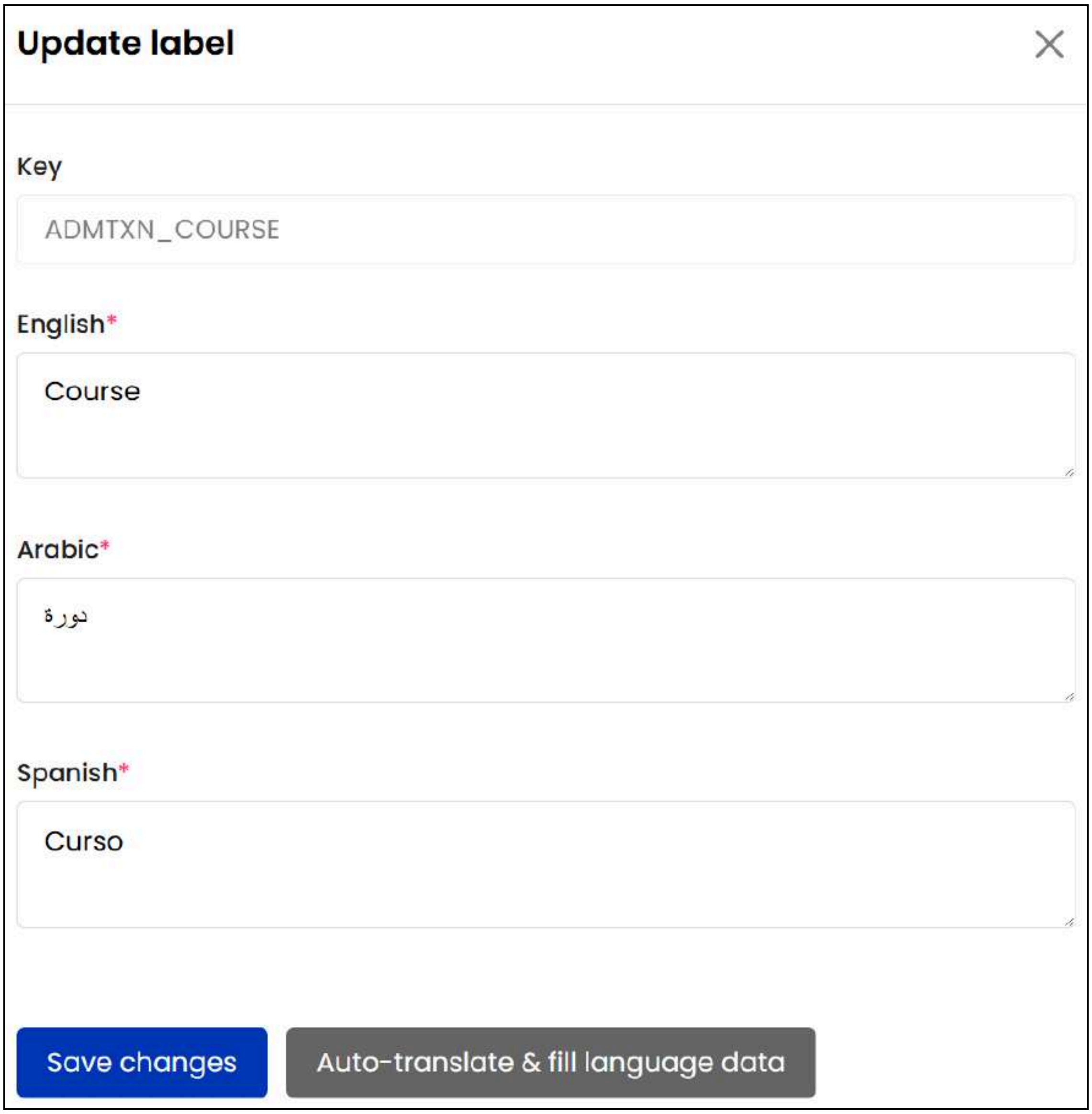
DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

- **Sr. No.:** Serial number
- **Key:** The system's unique key of the respective label.
- **Caption:** The labels text.

Action button

There is a single action button next to each entry—**Edit** .

Click this to edit the label. The **Update label** form will appear.



Update the following:

- **Key:** This is the system's key (also called identifier in programmer's language) and is used at the backend.

  This field is **inaccessible**.

- **Primary language (English)*:** Edit the name of the label in the primary language data.

  Avoid editing the label, unless absolutely necessary or to help you understand its working better. For instance, instead of # (hash), you can change the name to Serial no., or Sr. no., based on whichever text suits your needs.

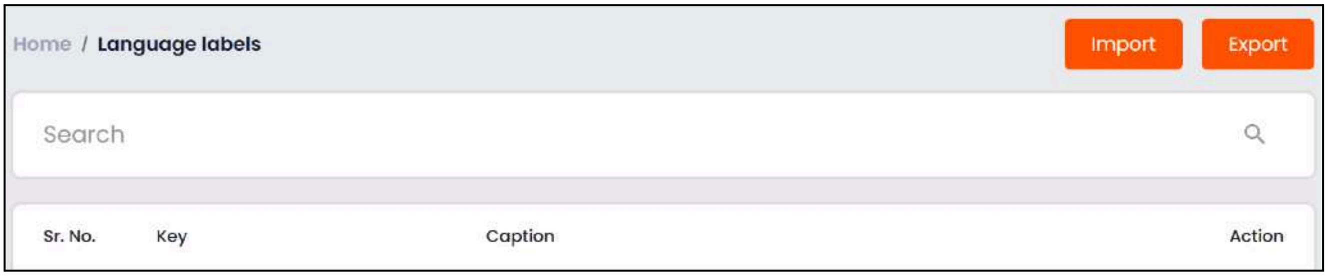
- **Secondary language (Arabic)*:** Edit the name of the label in the secondary language data.

  The number of secondary language fields available in this form will depend on the number of languages that the website is in. In this example, the website has two secondary languages - Arabic and Spanish. Edit the fields in all the secondary languages available (as they are mandatory).

Once done, click **Save changes**, and the form will close on its own.

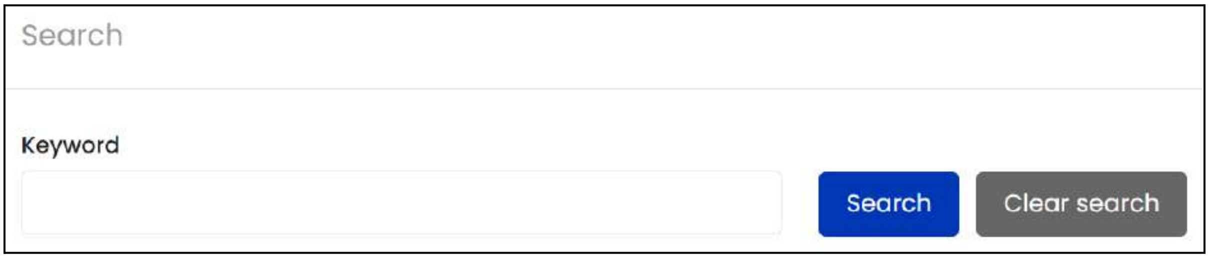
Search for a language label

Use the search functionality at the top of the list to find a specific language label.



Click the search bar or to expand it. Click or the search bar again to collapse the section.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.



Enter the language label caption in the **keyword** field and click **Search** to get the results.

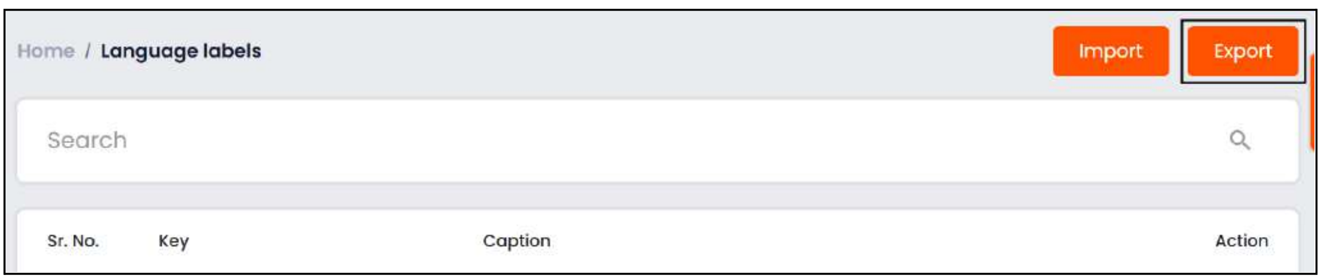
Click **Clear** to reset the field and start a new search.

Import/Export language labels data

The data can be both imported and exported for this submodule. Here is how it can be done.

Export

To export the language labels data from this page, click **Export** from the upper-right corner.



The data will be downloaded as a `.csv` file (Comma-Separated Values) containing all the language labels, which can be used for backups or external purposes.

A success message will appear once the download is complete.

After exporting, modify the labels as needed, and then import the updated file into the system.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

Edit & upload using Google Sheets

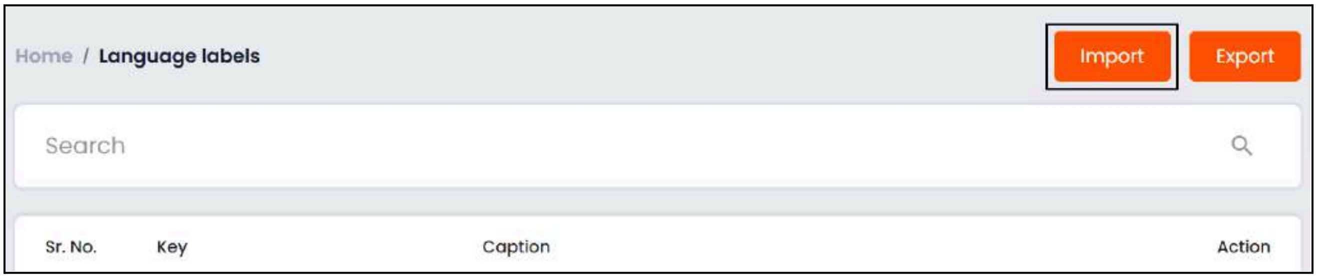
To view or even make changes to the exported language label file, follow these steps:

- Download the file and upload it to your Google Drive.
- Open the file in Google Sheets to begin editing.
    - Only modify the fields under the language columns.
    - Do not make any changes to the Key column. Changes in this column will be ignored by the Yo!Coach platform.
    - Do not add new columns, including additional language columns. The system will not recognize or reflect these changes.
- Avoid editing text inside curly brackets { }. These brackets contain placeholder parameters used by the system, such as {username} or {order_id}. Changing these values may result in display issues on the front end.
- If using Google Translate, carefully review the translated content to ensure that all values inside curly brackets { } remain unchanged. These parameters must not be translated or modified.
- After completing your edits, save the changes in Google Sheets.
- Download the updated file in `.csv` format from Google Sheets. The system only accepts files in `.csv` format.
- Import the updated `.csv` file back into the system to apply your changes

Make sure all edits are done through Google Sheets and that the file uploaded is in `.csv` format to ensure compatibility with the Yo!Coach platform.

Import

To import language labels, click **Import**.



This will open the **Import labels** form, where you can upload the modified file.

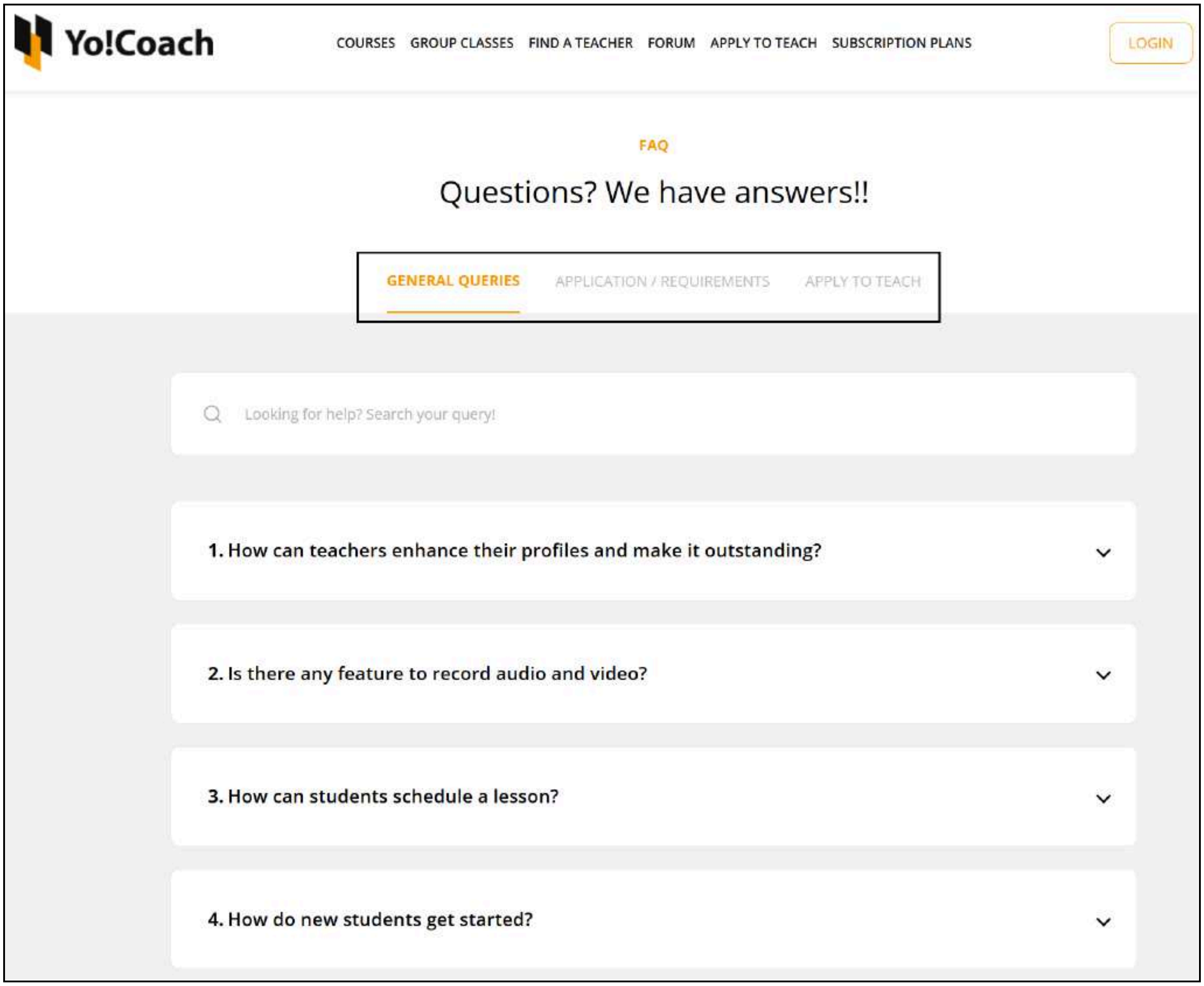
Click **Choose file**, select the previously saved `.csv` file from your system and upload it.

Only `.csv` files with the original structure are accepted for import.

10.10 FAQ categories

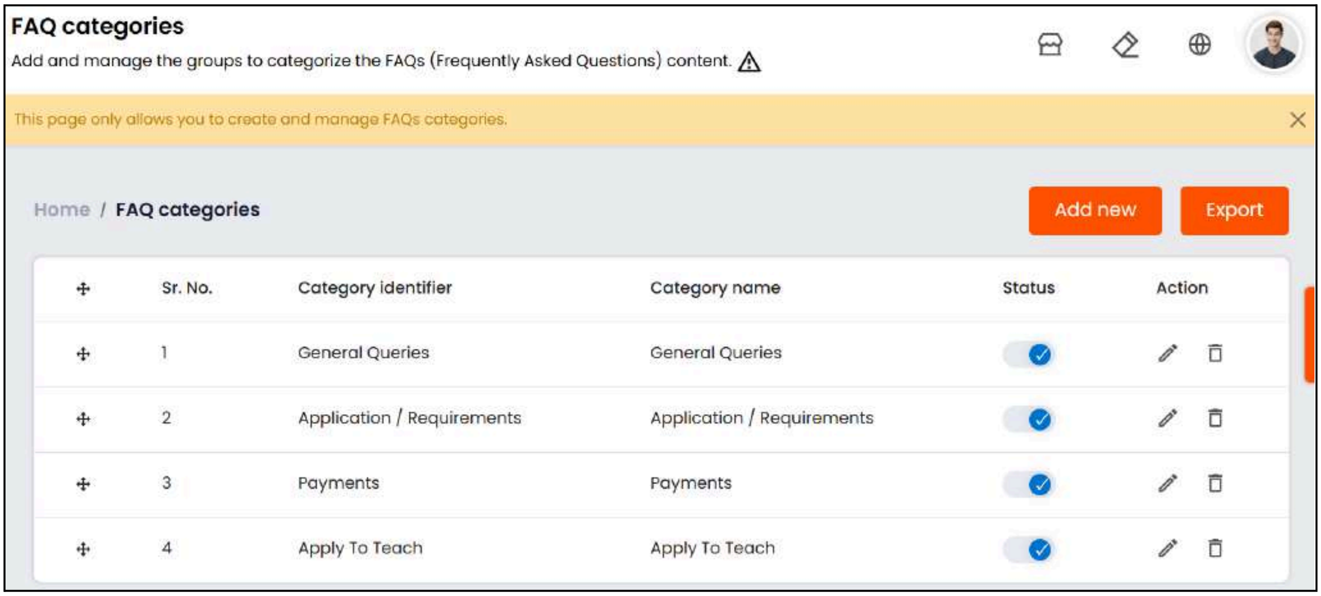
Every platform needs an FAQ page. This submodule lets you create categories to organize the FAQs on the front end, making it easier for users to find what they need.

All FAQ categories appear as tabs on the FAQs page on the front end (as shown in the image below).



Selecting a tab displays all the FAQs listed under it on the page.

Manage the categories listed on the FAQs page through this submodule.



The list will be empty if you recently purchased the platform and chose not to include dummy content provided by FATbit during installation.

An FAQ category appears on the front end only if it has one or more linked FAQs; otherwise, it will not be displayed.

Add and link FAQs to the FAQ categories under the [FAQs submodule](#).

Manage the FAQ categories list

Each entry in the list includes the following details and provides options for management including:

- **Drag-and-drop :** Click this next to an FAQ category to move it up or down the list, and the serial numbers will automatically update to reflect the new sequence.

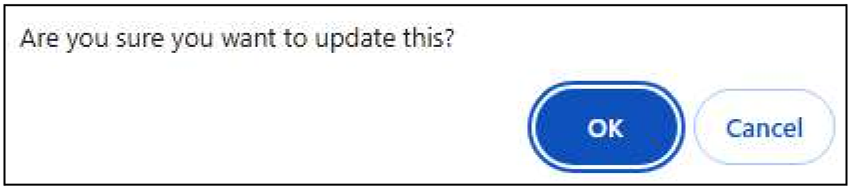
  The FAQ category will appear on the front end in the same order as they are arranged on this page.

- **Sr. no:** Serial number.
- **Category identifier:** The FAQ category's unique system identifier.
- **Category name:** The name of the FAQ category. This name is displayed on the front end.

- **Status:** Edit the status (activate or deactivate) of the FAQ category as per your requirements using the toggle switch beside it, under the status column.

  Turn **on** the toggle switch beside the FAQ category to activate it. Leave this **off** or turn it **off** to deactivate the FAQ category, and it will be removed from the front end.

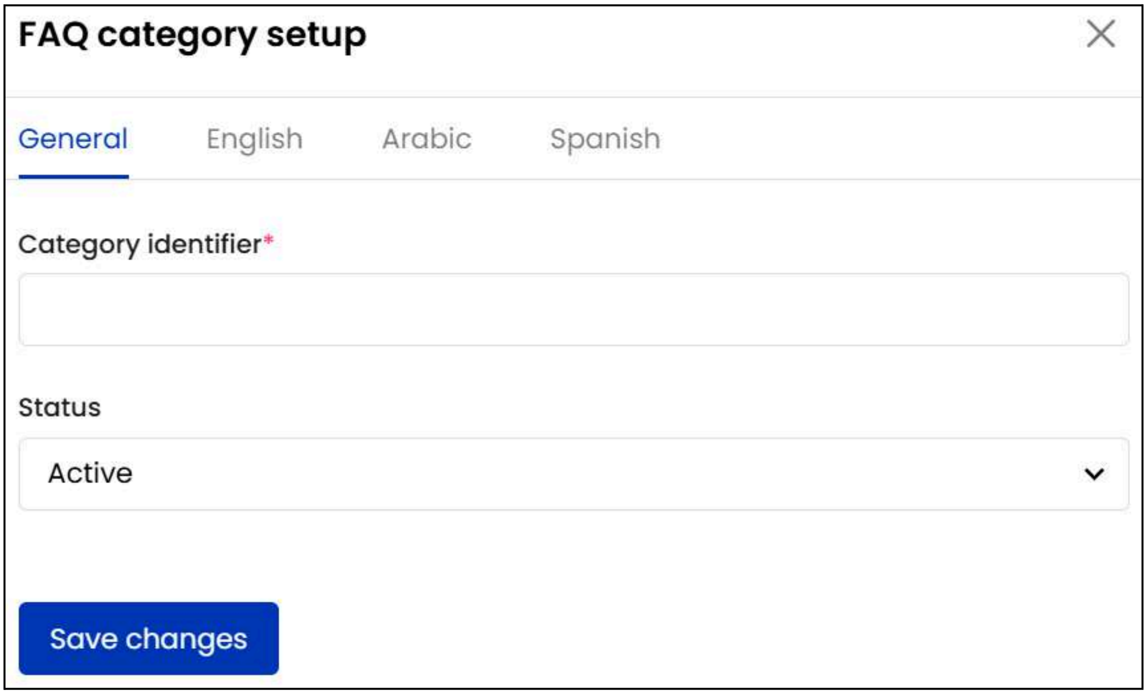
  A warning dialog box will appear for both actions, asking if you want to update the status or not.



  Click **Ok** to delete it or **Cancel** to abort the action.

Add an FAQ category

Click **Add new** in the upper-right corner of the page to open the **FAQ category setup** form.



DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

This form contains multiple tabs: the General tab, followed by the Primary language tab.

After that, you'll find the Secondary language tabs, corresponding to the languages available on your platform.

Let's start with the **General tab**.

General tab

Update the following:

- **Category identifier*:** Enter a unique FAQ category system identifier.

  It can match the FAQ category name, as defined under the Language data tabs (e.g., English, Arabic, Spanish).

  The identifier is used to save data in the system and will not be displayed anywhere on the platform. Ensure the identifier is unique; otherwise, an error message will appear.

- **Status:** Select the status of the FAQ category. Click the field and select "**Active**" to publish it on the front end.

  Select "**Inactive**" to temporarily hide it from the front end.

Once done, click **Save changes**.

This will direct you to the next tab, which is the primary language tab (English tab).

English tab

This is the primary language tab, and completing this tab is mandatory for publishing the FAQ category on the platform.

Since English is set as the primary language, this tab is labeled **English**.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

Update the following:

- **Category name*:** Enter the category name in the primary language.

  This name will appear on the front end of the platform.

- **Auto-translate into other languages:** Check mark this to automatically update the secondary language(s) data. The data in the subsequent language tab(s) will be auto-filled.

  This feature is available only if the [Microsoft text translator API](#) is configured under Settings > System configurations > [Third-party APIs](#).

  If you prefer to manually fill in the secondary language(s) data, leave the checkbox unselected.

Once done, click **Save changes**.

The next tab(s) will be the secondary language tab(s) (Arabic, Spanish, etc.), which include the same fields as the English tab.

*If you had selected the auto-translate option, the secondary language tab(s) will be prefilled. Review the data, make any necessary edits, click **Save changes**, and close the form.*

*If you did not use the auto-translate feature earlier, use the **Auto-translate & fill language data** button beside the **Save changes** button on each secondary language tab to auto-fill the secondary language fields. Then, click **Save changes**, and move to the next tab, or close the form.*

*If you do not want to fill the secondary language tab(s) at this time, complete only the primary language tab (English tab), click **Save changes**, and close the form.*

After updating all necessary fields, click in the upper-right corner of the form.

Action buttons

Under the **Action** column, each entry includes two action buttons, allowing you to perform specific actions.

The functions of each button are explained in detail below:

i. Edit

Click this to edit the FAQ category's details.

The [FAQ category setup](#) form will appear.

Update the fields, then click **Save changes**. To close the form, click in the upper-right corner.

ii. Delete

Click this to delete the FAQ category from the system. A confirmation message will appear.

Click **OK** to confirm the action or **Cancel** to abort it.

If you delete an FAQ category that has been linked FAQs, you must relink those FAQs to another FAQ category for them to appear on the front end.

<u>**DISCLAIMER:**</u> The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

Export FAQ categories data

To export the FAQ categories data from this page, click **Export** from the upper-right corner.

The data will be downloaded as a `.csv` file (Comma-Separated Values), which can be used for backups or external purposes.

A success message will appear once the download is complete.

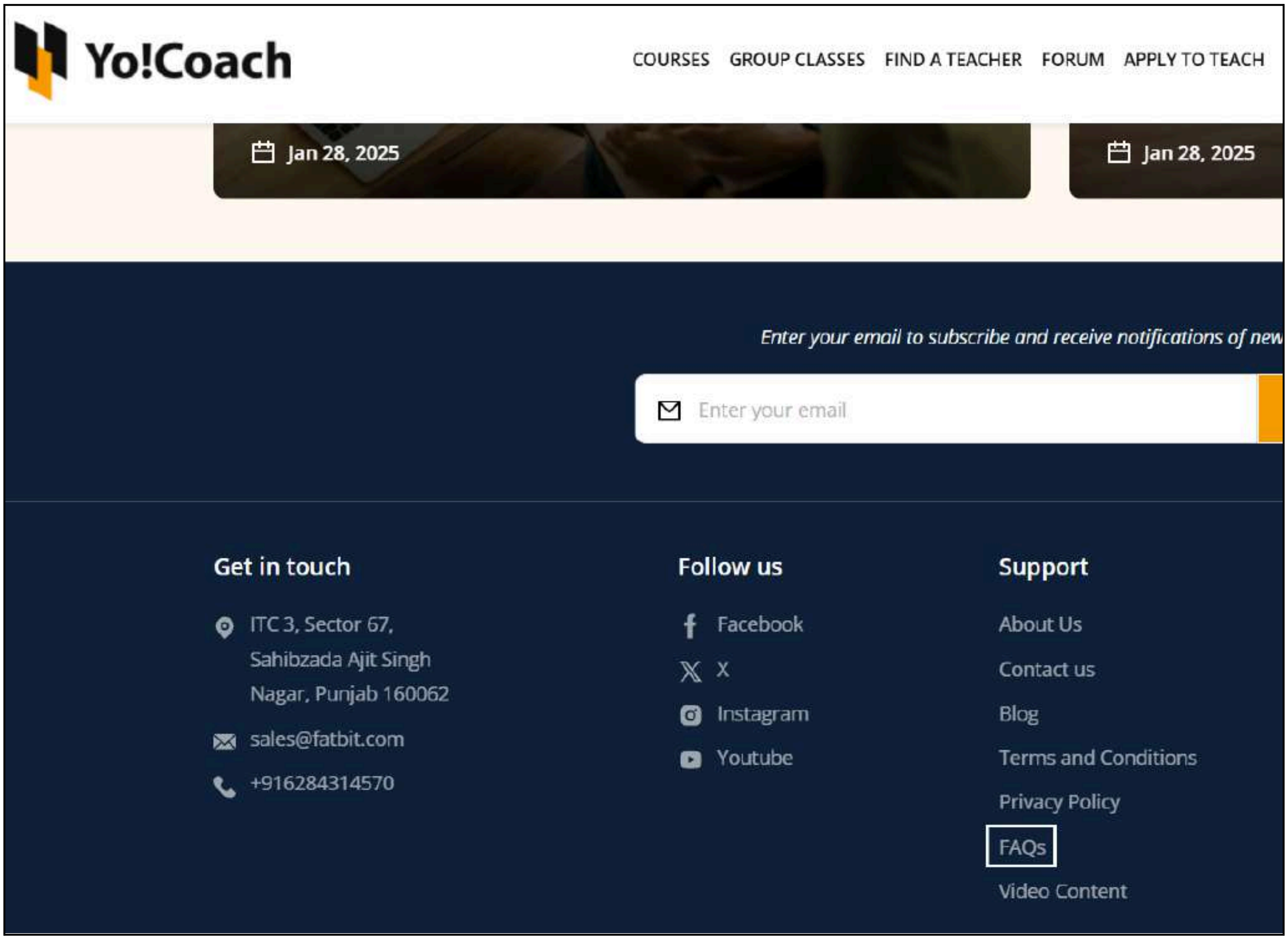
DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

10.11 FAQs

FAQs, short for Frequently Asked Questions, is a page (or section) that every website has. It is created to help the users get answers for any general queries they may have.

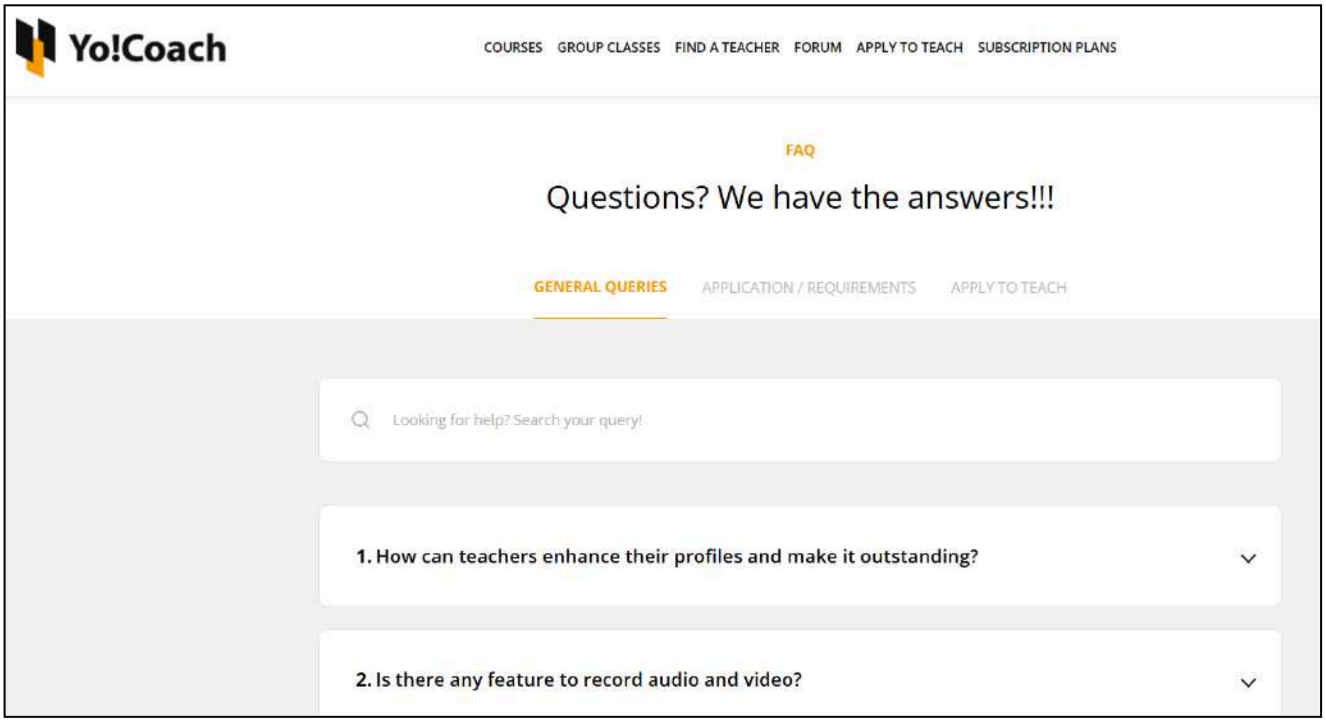
In Yo!Coach, there is a dedicated FAQs page and an FAQs section on the seller registration page.

To view the FAQs page, go to the website's home page and click FAQs from the footer section.



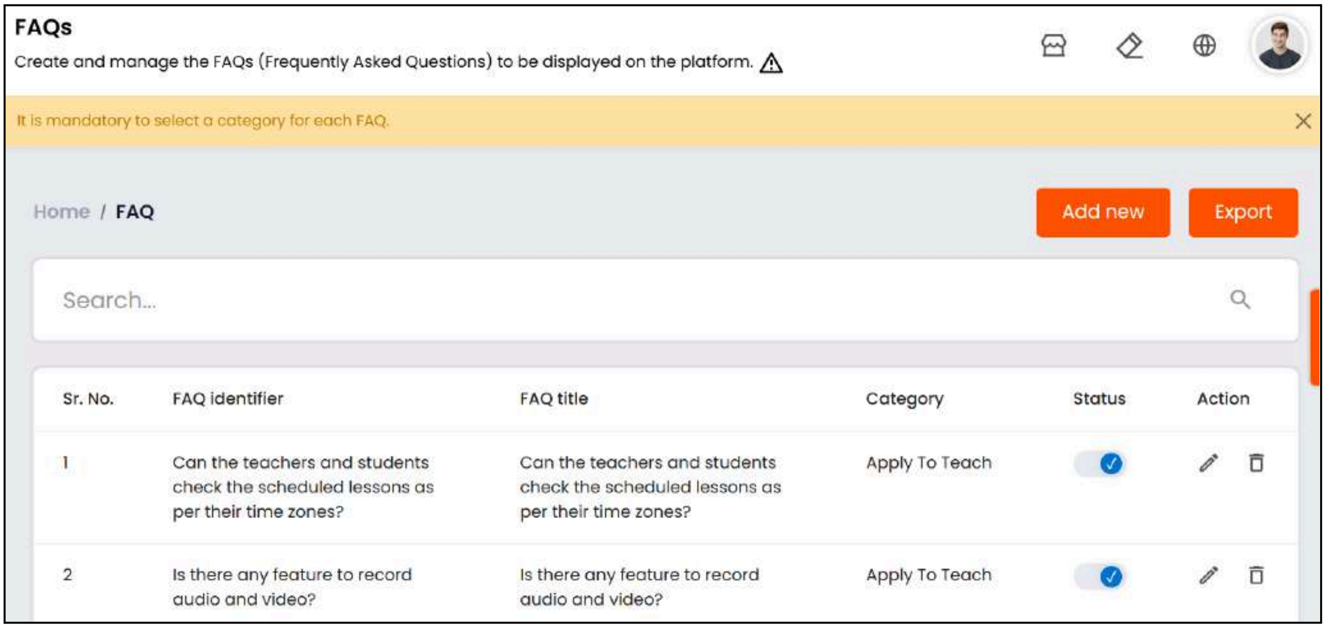
This will direct you to the FAQs page.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.



FAQs on the FAQs page are grouped into categories, making it easier for users to find answers.

Use this submodule to create FAQs and link them to the categories created in the previous submodule.



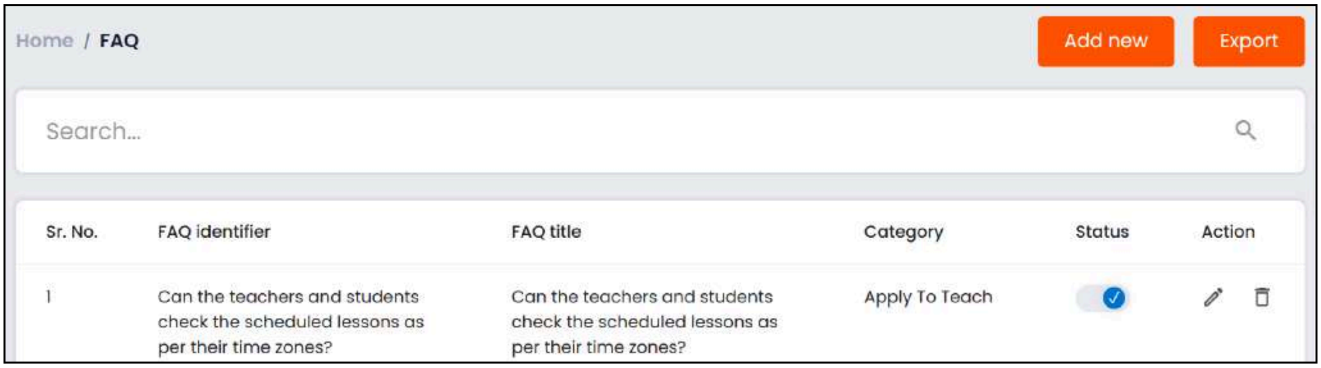
The list will be empty if you recently purchased the platform and chose not to include dummy content provided by FATbit during installation.

Setting up the FAQs page

There are two submodules involved in setting up the FAQs page: [FAQ categories] and [FAQs].

- **Step 1:** Create an FAQ categories.
- **Step 2:** Create an FAQ and link it to the FAQ category.

Manage the FAQs list



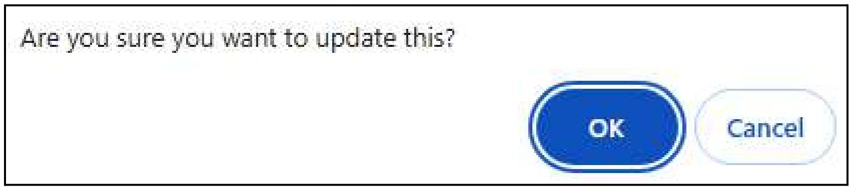
Each entry in the list includes the following details and provides options for management including:

- **Sr. no:** Serial number.
- **FAQ identifier:** The FAQ's unique system identifier.
- **FAQ title:** The FAQ title. This title (which is the question) is displayed on the front end.
- **Status:** Edit the status (activate or deactivate) of the FAQ as per your requirements using the toggle switch beside it, under the status column.

  Turn **on**  the toggle switch beside the FAQ to activate it.

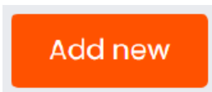
  Leave this **off** or turn it **off** to deactivate the FAQ, and it will be removed from the front end.

  A warning dialog box will appear for both actions, asking if you want to update the status or not.

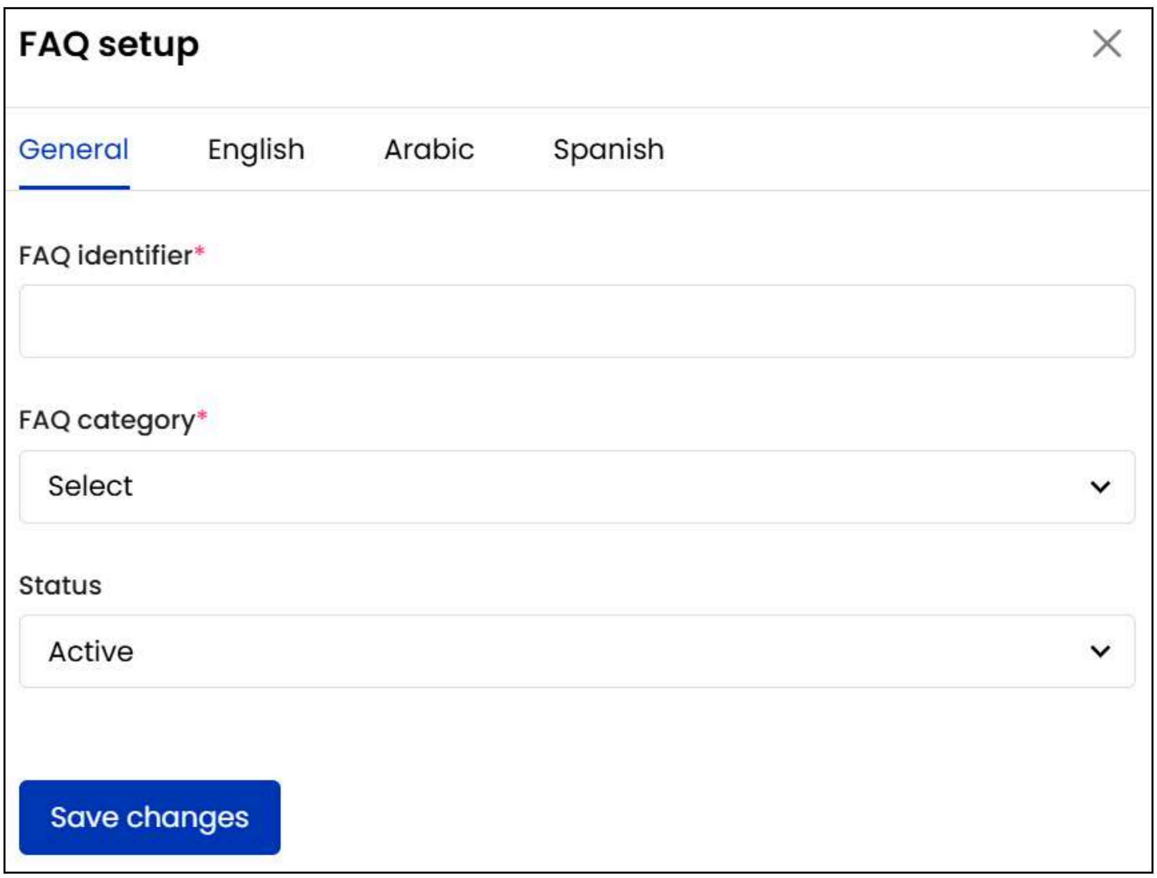


Click **Ok** to delete it or **Cancel** to abort the action.

Add an FAQ

Click 

in the upper-right corner of the page to open the **FAQ setup** form.



This form contains multiple tabs: the General tab, followed by the Primary language tab.

After that, you'll find the Secondary language tabs, corresponding to the languages available on your platform.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

Let's start with the **General tab**.

General tab

Update the following:

- **FAQ identifier*:** Enter a unique FAQ system identifier.

  It can match the FAQ title, as defined under the Language data tabs (e.g., English, Arabic, Spanish).

  The identifier is used to save data in the system and will not be displayed anywhere on the platform. Ensure the identifier is unique; otherwise, an error message will appear.

- **FAQ category:** Click and select the FAQ category from the drop down list populated with the categories added in the FAQ categories module.
- **Status:** Select the status of the FAQ. Click the field and select "**Active**" to publish it on the front end.

  Select "**Inactive**" to temporarily hide it from the front end.

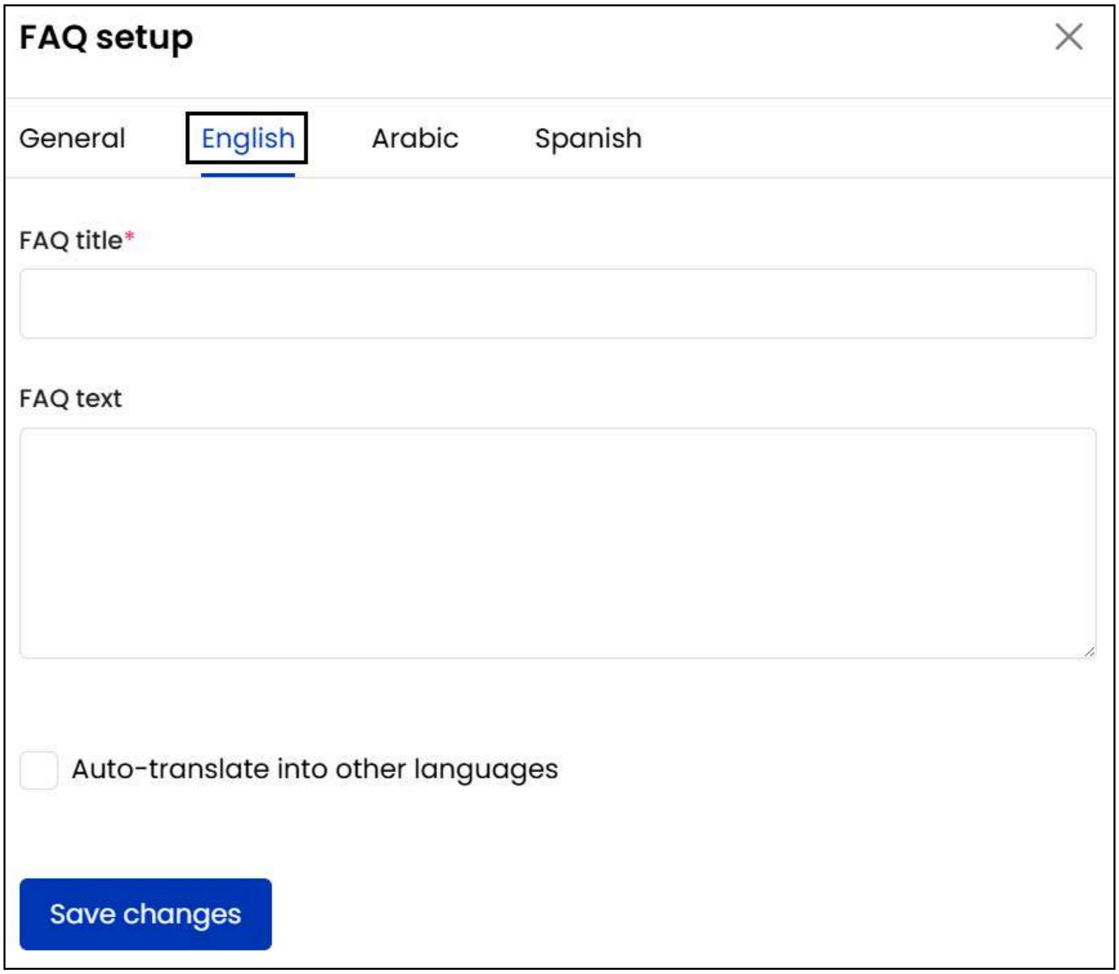
Once done, click **Save changes**.

This will direct you to the next tab, which is the primary language tab (English tab).

English tab

This is the primary language tab, and completing this tab is mandatory for publishing the FAQ on the platform.

Since English is set as the primary language, this tab is labeled **English.**



Update the following:

- **FAQ title*:** Enter the FAQ title, which is the question, in the primary language. This will be displayed at the front end on the FAQs page.
- **FAQ text:** Enter the answer that will be displayed under the FAQ title.
- **Auto-translate into other languages:** Check mark this to automatically update the secondary language(s) data. The data in the subsequent language tab(s) will be auto-filled.

  *This feature is available only if the [Microsoft text translator API](#) is configured under **Settings > System configurations >** [Third-party APIs](#).*

  If you prefer to manually fill in the secondary language(s) data, leave the checkbox unselected.

Once done, click **Save changes**.

<u>**DISCLAIMER:**</u> The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

The next tab(s) will be the secondary language tab(s) (Arabic, Spanish, etc.), which include the same fields as the English tab.

*If you had selected the auto-translate option, the secondary language tab(s) will be prefilled. Review the data, make any necessary edits, click **Save changes**, and close the form.*

*If you did not use the auto-translate feature earlier, use the **Auto-translate & fill language data** button beside the **Save changes** button on each secondary language tab to auto-fill the secondary language fields. Then, click **Save changes**, and move to the next tab, or close the form.*

*If you do not want to fill the secondary language tab(s) at this time, complete only the primary language tab (English tab), click **Save changes**, and close the form.*

After updating all necessary fields, click in the upper-right corner of the form.

Action buttons

Under the **Action** column, each entry includes two action buttons, allowing you to perform specific actions.

The functions of each button are explained in detail below:

i. Edit

Click this to edit the FAQ's details.

The [FAQ setup] form will appear.

Update the fields, then click **Save changes**. To close the form, click in the upper-right corner.

ii. Delete

Click this to delete the FAQ from the system. A confirmation message will appear.

Click **OK** to confirm the action or **Cancel** to abort it.

Search for an FAQ

Use the search functionality at the top of the list to find a specific FAQ.

Click the search bar or to expand it. Click or the search bar again to collapse the section.

Enter the FAQ title in the **keyword** field and click **Search** to get the results.

Click **Clear** to reset the field and start a new search.

Export FAQs data

To export the FAQs data from this page, click **Export** from the upper-right corner.

The data will be downloaded as a `.csv` file (Comma-Separated Values), which can be used for backups or external purposes.

A success message will appear once the download is complete.

To export specific FAQ data, use the [search bar]() to apply the necessary filters and define the criteria.

After setting the filters and clicking **Search** to view the results, click **Export** to download the filtered data as a `.csv` file.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
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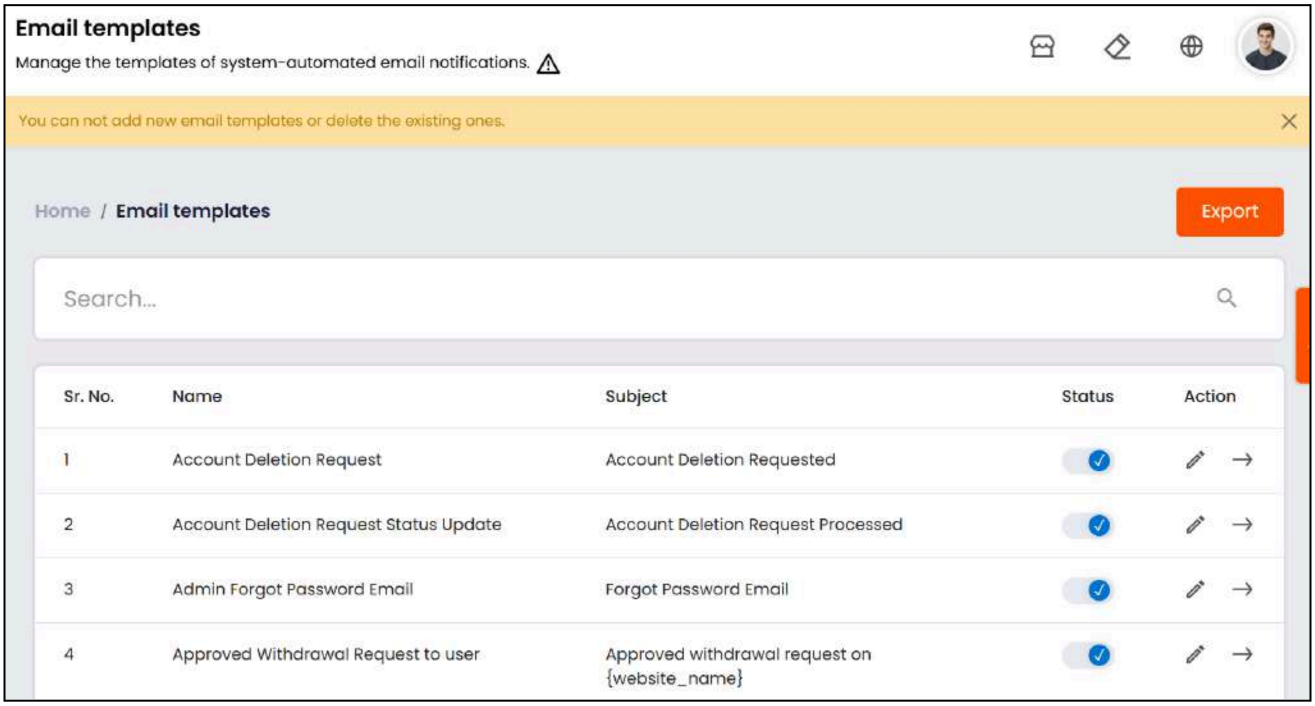
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

10.12 Email templates

This page lists multiple predefined email templates used to handle various user actions across the **Yo!Coach** tutoring platform, which supports lessons, group classes, and courses.



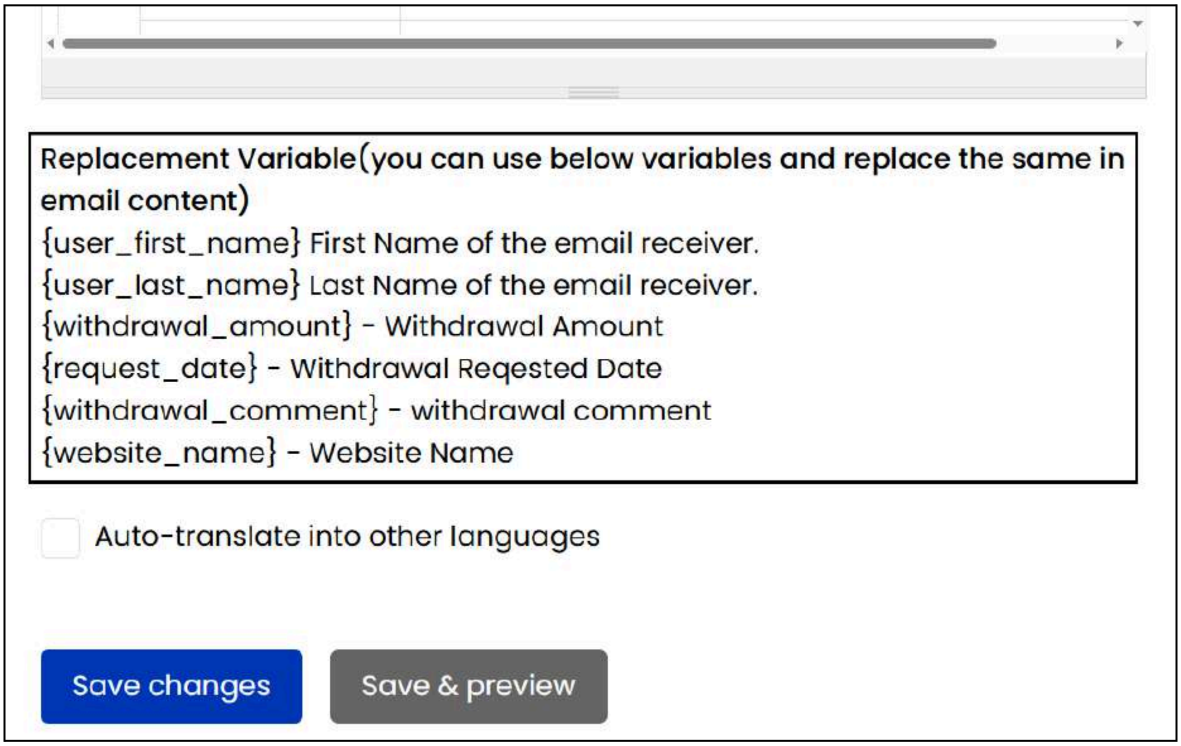
When an action occurs on the platform, the system automatically sends out email notifications to the user performing the action and any other users affected by it.

For example, when a learner books a lesson, they receive an email confirmation. The assigned teacher is also notified, and you—the admin—receive a copy of the complete booking details.

Each user-related action has a corresponding system email template.

> ! *You cannot add or delete templates from this list, but you can edit most parts of a template, including the subject line, header, body content, and some other sections.*

Each template includes replacement variables, shown in curly brackets like ***{teacher_name}*** or ***{lesson_date}***.



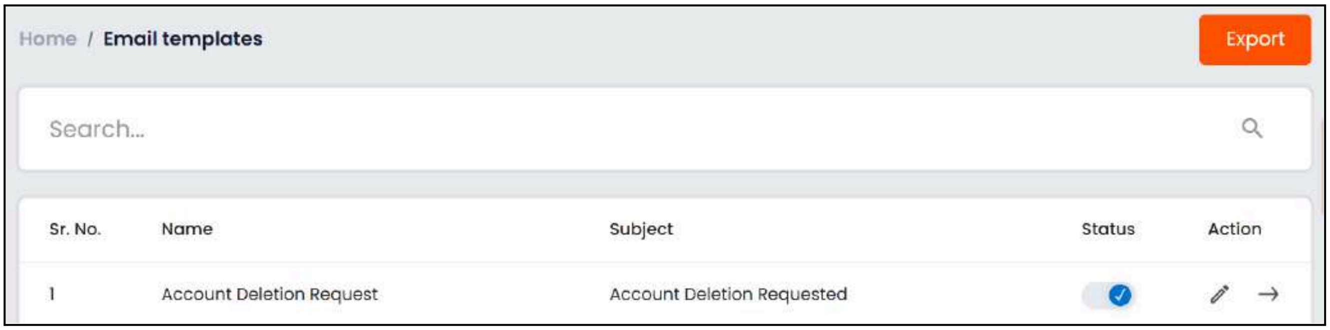
These variables are placeholders that the system replaces with the correct values when sending emails.

Do not edit the content inside the curly brackets ***{ }***.

If you want to use or replace a variable, refer to the list of available variables shown below the editing fields of the specific email template.

For example, the variable ***{website_name}*** is automatically replaced with your platform's name—**Yo!Coach**—when the email is sent.

Manage the email templates list



DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

Each entry in the list includes the following details and provides options for management including:

- **Sr. no:** Serial number.
- **Name:** The name of the email template, which also defines when the email template is used and to which user the email was sent.
- **Subject:** The email subject line used when this template is sent to a user by the system.
- **Status:** Edit the status (activate or deactivate) of the email template as per your requirements using the toggle switch beside it, under the status column.

  Turn **on** the toggle switch beside the template to activate it.

  Leave this **off** or turn it **off** to deactivate the template. It will no longer be used when the associated action occurs.

  A warning dialog box will appear for both actions, asking if you want to update the status or not.

  Click **Ok** to delete it or **Cancel** to abort the action.

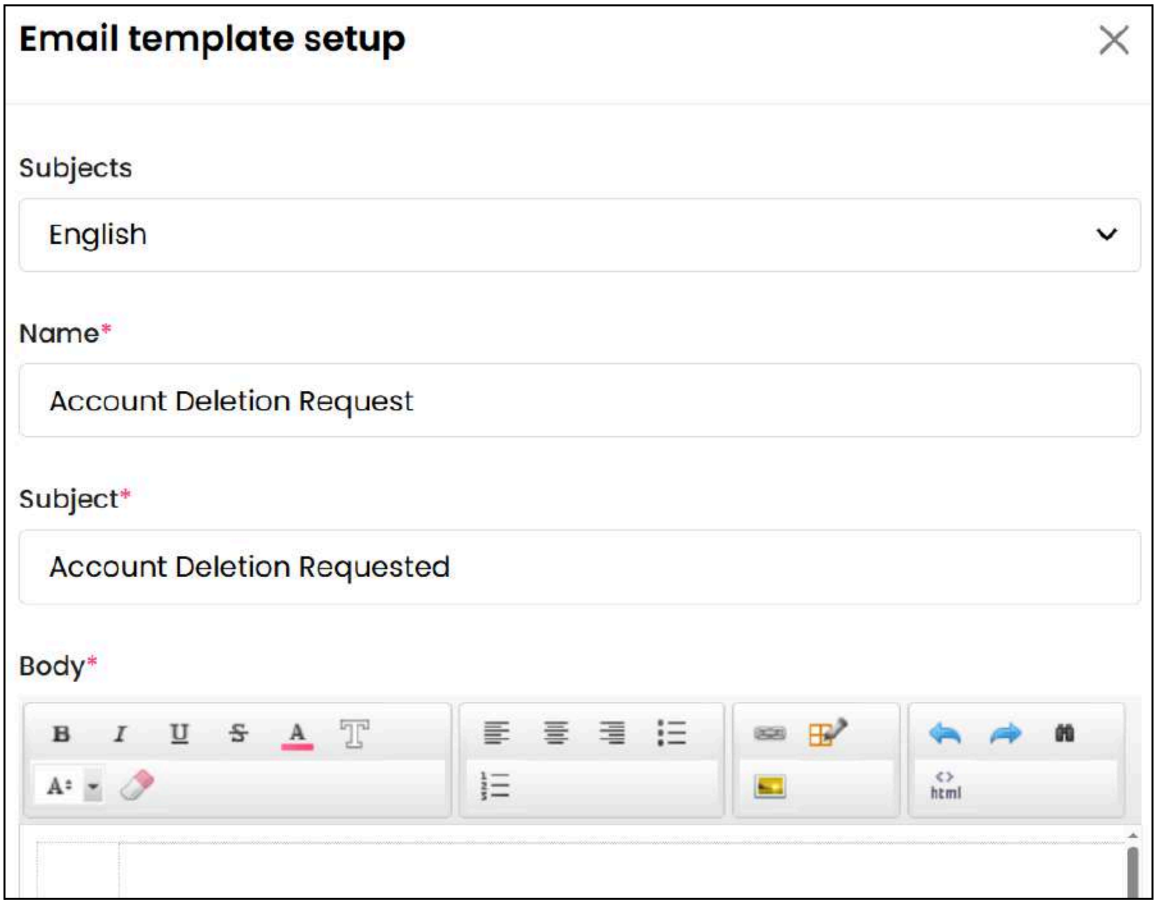
Action buttons

Under the **Action** column, each entry includes two action buttons, allowing you to perform specific actions.

The functions of each button are explained in detail below:

i. Edit

Click this to edit the email template. The **Email template setup** form will appear.



Update the following:

- **Language:** Select the preferred language.

  To do this, click the field and choose a language from the dropdown list. The selected language will be used for the fields below.

  By default, the fields are displayed for the primary language. Select each language one-by-one to enter data for all the system language(s).

- **Name*:** Enter the name of the email template.

  A default value is already filled in. You can edit it if needed, but it is recommended to keep the default value.

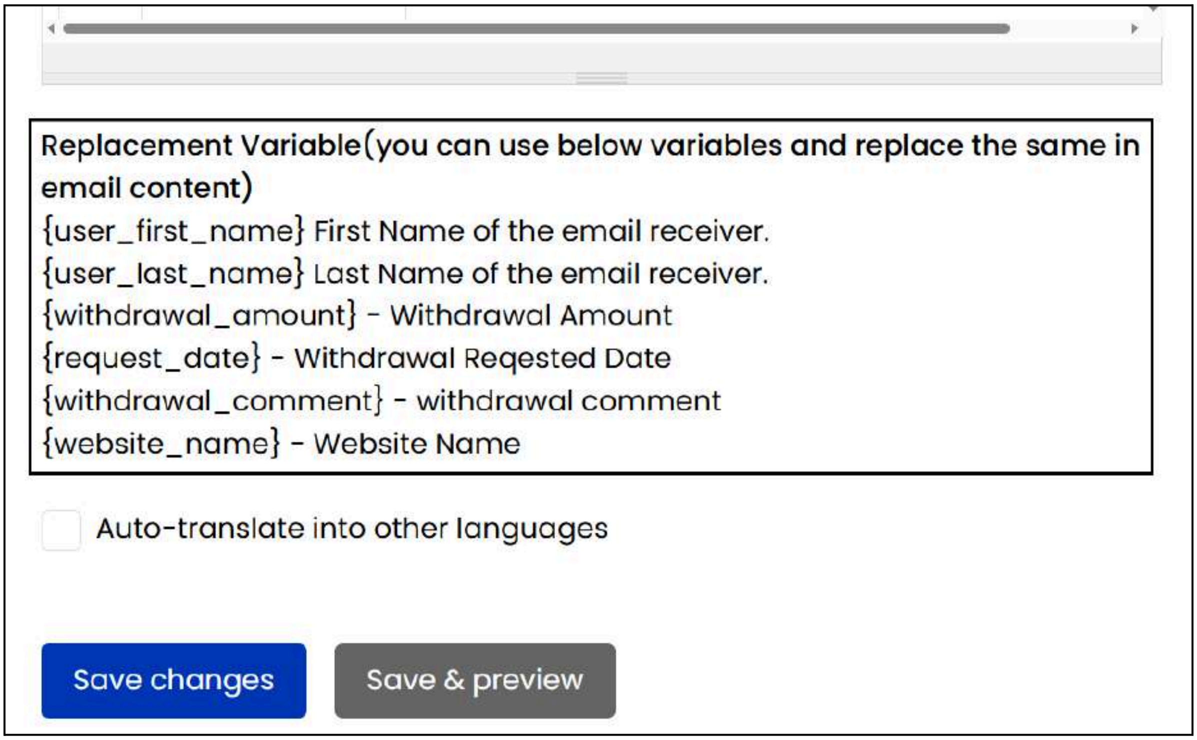
  This name is only for system and internal reference. It will not be used in the actual email.

- **Subject*:** Edit the subject line of the email.

  This will appear as the subject of the email sent to users.

- **Body*:** Edit the body of the email using the content editor. Default content is already provided. You can modify it as needed.

  To use a replacement variable, copy it from the list shown below the editor. Each email template has a unique list of applicable variables, based on the action that triggers the email.



*Do not edit the content inside curly brackets **{ }**. These brackets hold system variables that are automatically replaced with relevant information when the email is sent. For example, **{website_name}** is replaced with the actual name of the website (e.g., Yo!Coach).*

- **Auto-translate into other languages:** Check mark this to automatically update the secondary language(s) data. The data in the subsequent language tab(s) will be auto-filled.

  *This feature is available only if the Microsoft text translator API is configured under **Settings > System configurations >** Third-party APIs.*

  If you prefer to manually fill in the secondary language(s) data, leave the checkbox unselected.

To preview the email, click **Save & preview**. A preview of the email will open in a new tab (as shown below).

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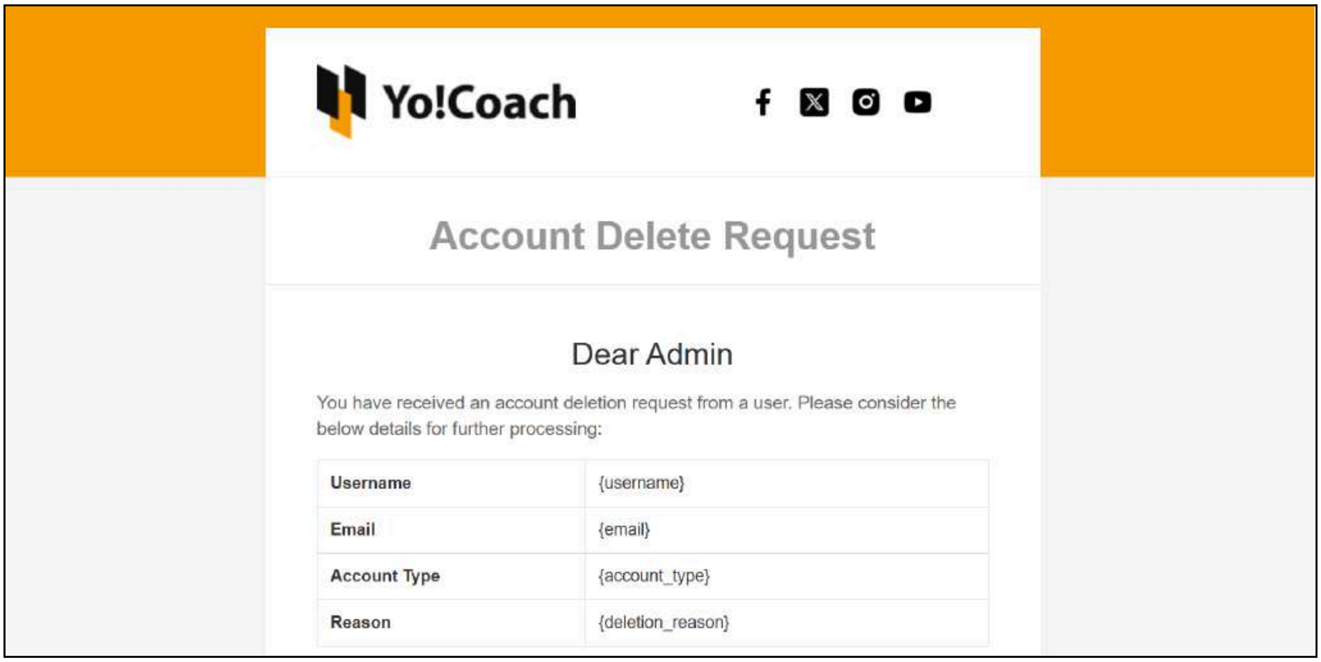
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.



Review the preview and close the tab.

Once everything has been updated, click **Save changes**.

The email template will be updated and the form will close automatically.

ii. Preview →

Click this to preview the email without having to open the setup form. A preview of the email will open in a new tab (as shown in the image above).

Review the preview and close the tab.

Edit the email header/footer layout

The **Email/Header footer layout** is listed as a template in the email templates list. This template controls the header and footer sections of all system-generated emails and can be edited as needed.

To update this template:

1. Search for **Email/Header footer layout** using the search bar at the top of the email templates page.

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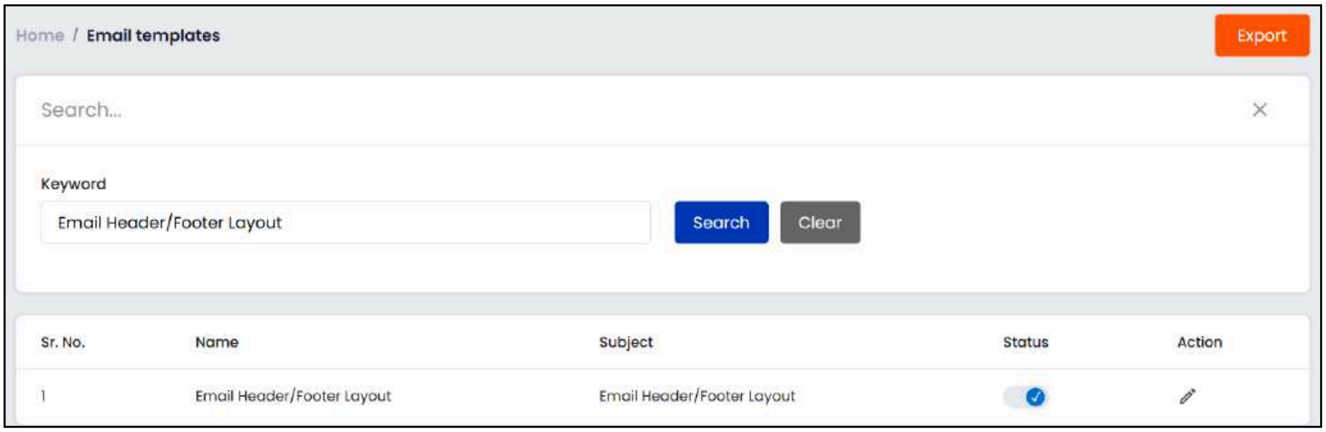
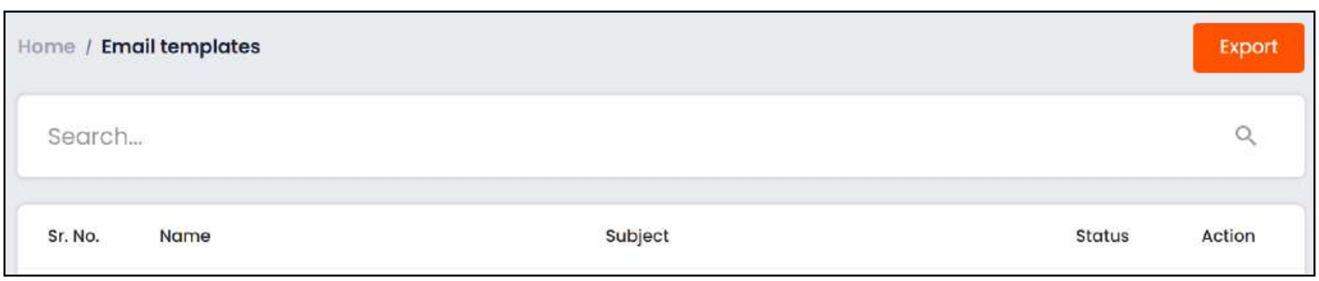


2. When the template appears in the list, click the [Edit button] next to it.
3. The email template setup form will open. This form includes the same fields as other email template forms.
4. Make your changes to the header and footer content.
5. After completing your edits, click **Save changes** to apply the updates.

Search for an email template

Use the search functionality at the top of the list to find a specific email template.



Click the search bar or 🔍 to expand it. Click ✕ or the search bar again to collapse the section.

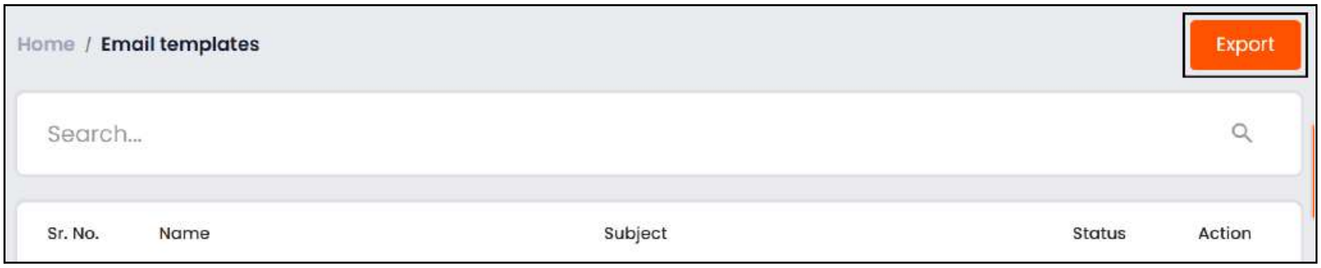
DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

Enter the FAQ title in the **keyword** field and click **Search** to get the results.

Click **Clear** to reset the field and start a new search.

Export email templates data

To export the email templates data from this page, click **Export** from the upper-right corner.



The data will be downloaded as a `.csv` file (Comma-Separated Values), which can be used for backups or external purposes.

A success message will appear once the download is complete.

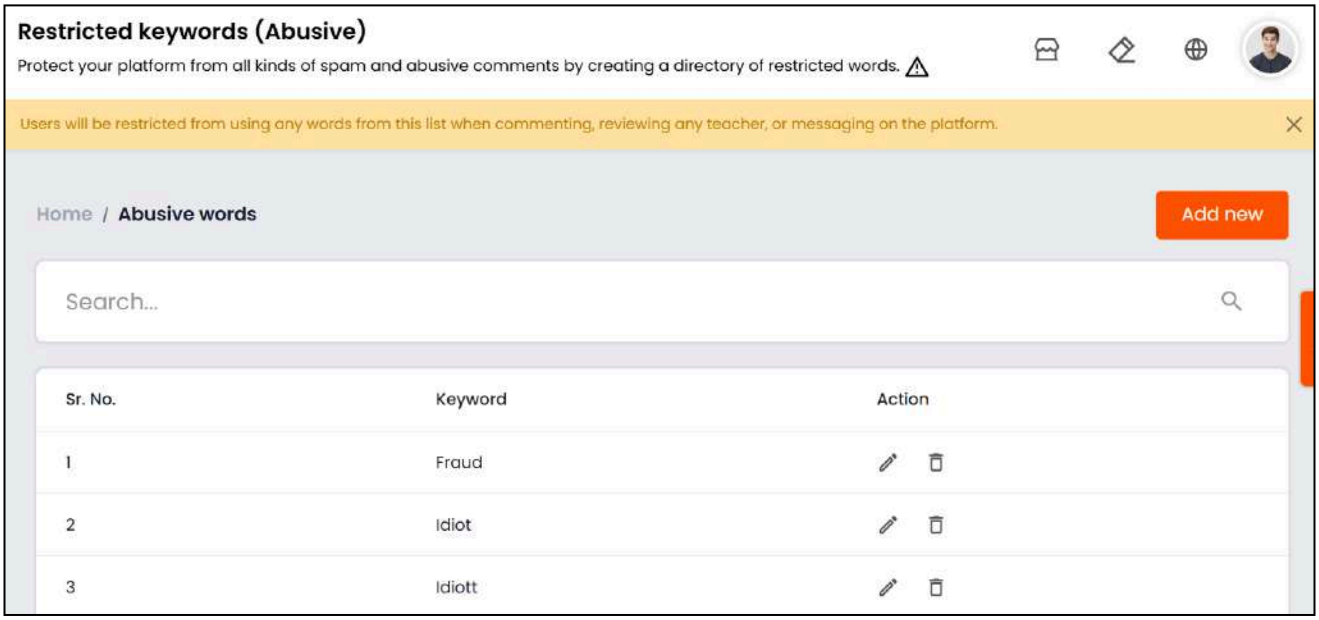
To export specific FAQ data, use the [search bar](#) to apply the necessary filters and define the criteria.

After setting the filters and clicking **Search** to view the results, click **Export** to download the filtered data as a `.csv` file.

10.13 Abusive words

Protect your learning platform from unwanted comments or inappropriate language by maintaining a directory of restricted words under this submodule.

This list helps block spam or abusive terms that users might try to use in reviews, messages, blog comments, forum comments or other platform interactions.



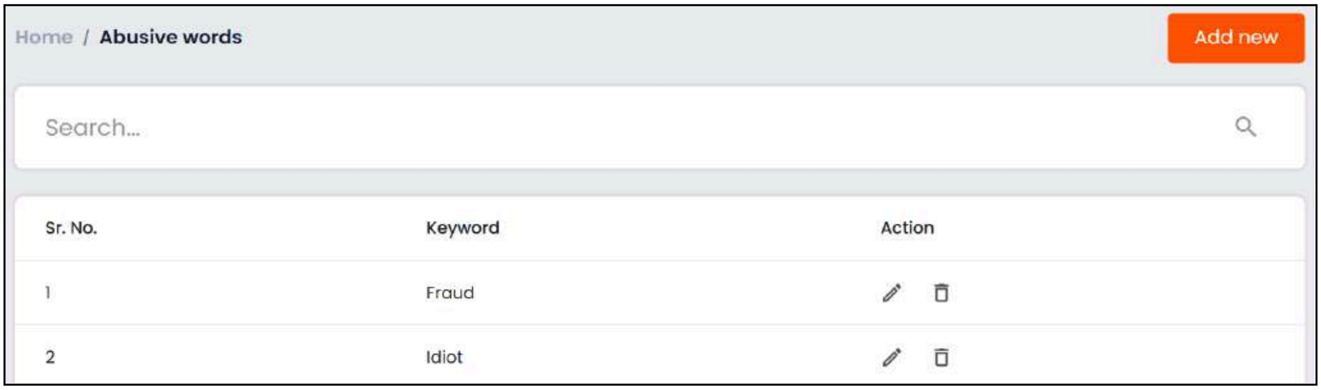
The list will be empty if you just bought the platform and didn't choose to have dummy content provided by FATbit during the platform installation.

Some points to note:

- If a user attempts to submit content containing a restricted word, the system displays an error message and prevents them from proceeding until they revise the content.
- Add as many keywords as needed to filter inappropriate language from being used on the platform.
- To block the same word in multiple languages, add each language-specific variation of the word as a separate entry.

Use this feature to maintain a respectful and safe learning environment across your marketplace.

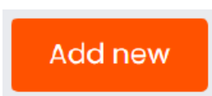
Manage the abusive words list



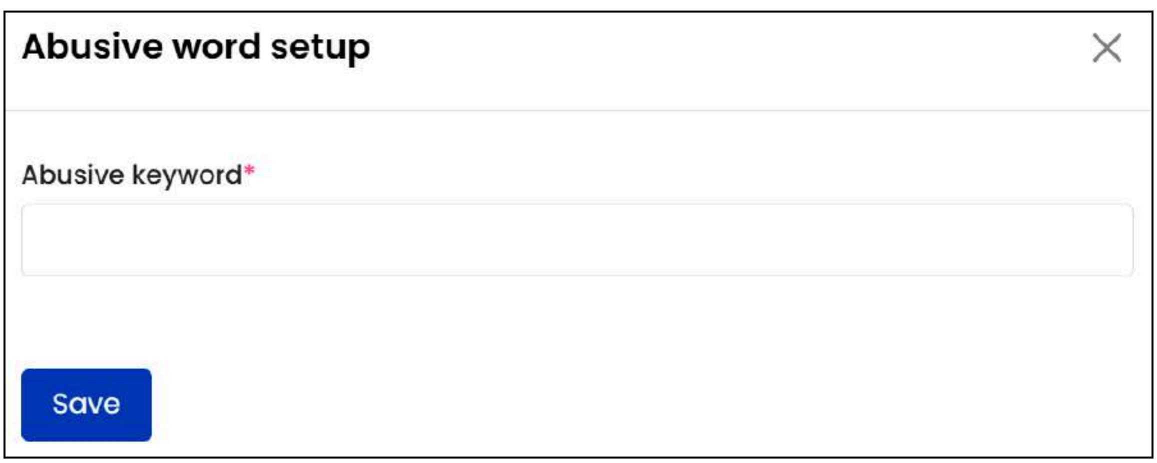
Each entry in the list includes the following details:

- **Sr. no:** Serial number.
- **Keyword:** The abusive keyword.

Add an abusive word

Click 

in the upper-right corner of the page to open the **Abusive word setup** form.



Update the following:

- **Abusive keyword*:** Enter the abusive word or phrase in the selected language.

Once done, click **Save**.

<u>**DISCLAIMER:**</u> The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

The abusive word will be added to the list.

Action buttons

Under the **Action** column, each entry includes two action buttons, allowing you to perform specific actions.

The functions of each button are explained in detail below:

i. Edit

Click this to edit the abusive words details.

The Abusive word setup form will appear.

Update the fields, then click **Save changes**. To close the form, click in the upper-right corner.

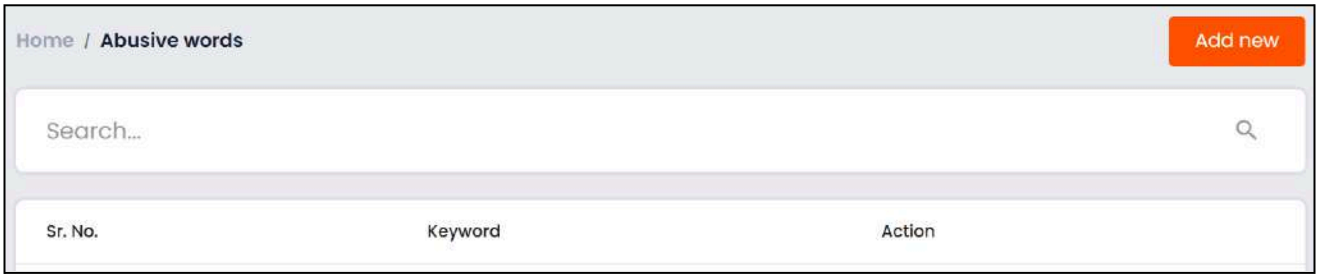
ii. Delete

Click this to delete the abusive word from the system. A confirmation message will appear.

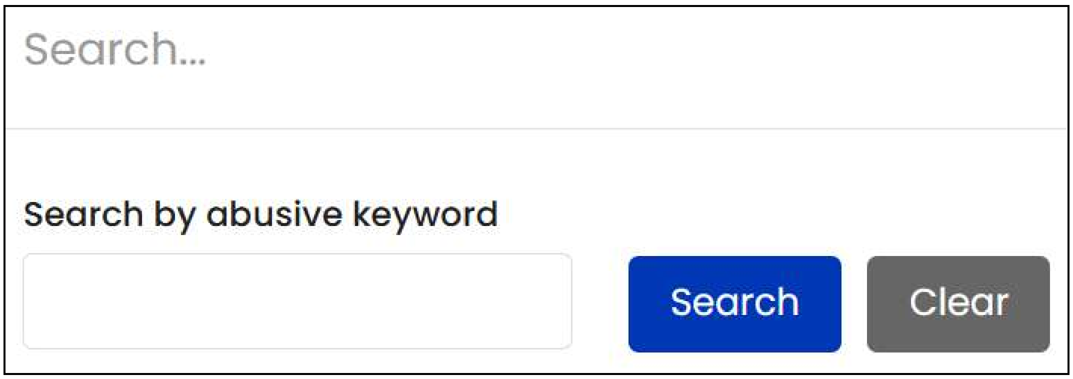
Click **OK** to confirm the action or **Cancel** to abort it.

Search for an abusive word

Use the search functionality at the top of the list to find a specific abusive word.



Click the search bar or to expand it. Click or the search bar again to collapse the section.



Enter the abusive word in the **Search by abusive keyword** field and click **Search** to get the results.

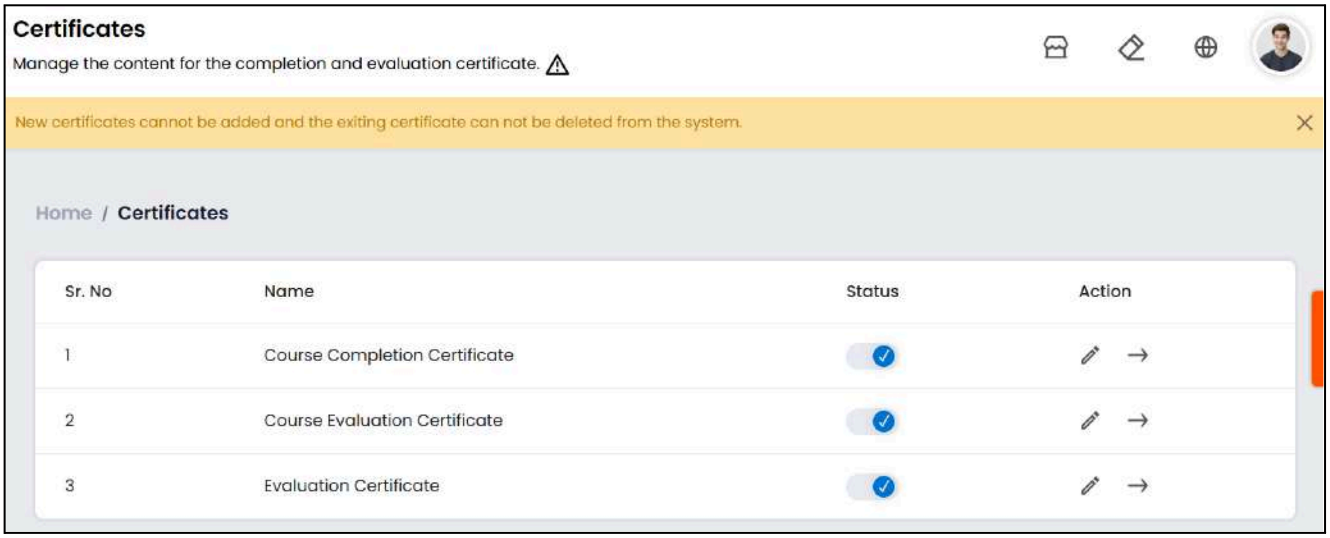
Click **Clear** to reset the field and start a new search.

10.14 Certificates

Once a learner completes a course on the platform, a certificate can be awarded to acknowledge their achievement.

Certificates can also be issued for quizzes, which may be linked to classes, lessons or courses.

All certificates available on the platform can be managed under this submodule.



The system includes three default certificates—two designed for courses and one for quizzes.

You cannot add new certificates or delete existing ones. However, you can edit the design and content of the available certificates to match your requirements.

You also cannot delete a certificate. So, if a certificate is not needed, you can deactivate the respective certificate.

Teachers have the option to link any of the available certificates to their course or quiz, or choose not to assign a certificate at all.

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An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

Manage the certificates list

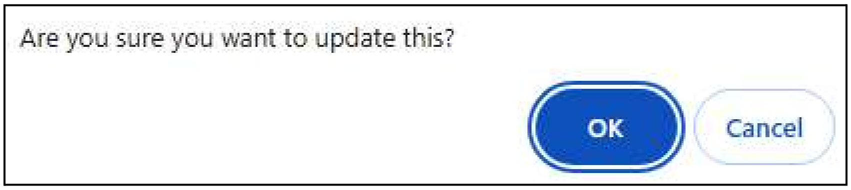
Each entry in the list includes the following details and provides options for management including:

- **Sr. no:** Serial number.
- **Name:** The name of the certificate.
- **Status:** Edit the status (activate or deactivate) of the certificate as per your requirements using the toggle switch beside it, under the status column.

  Turn **on** the toggle switch beside the certificate to activate it.

  Leave this **off** or turn it **off** to deactivate the certificate. It will no longer be used when the associated action occurs.

  A warning dialog box will appear for both actions, asking if you want to update the status or not.



  Click **Ok** to delete it or **Cancel** to abort the action.

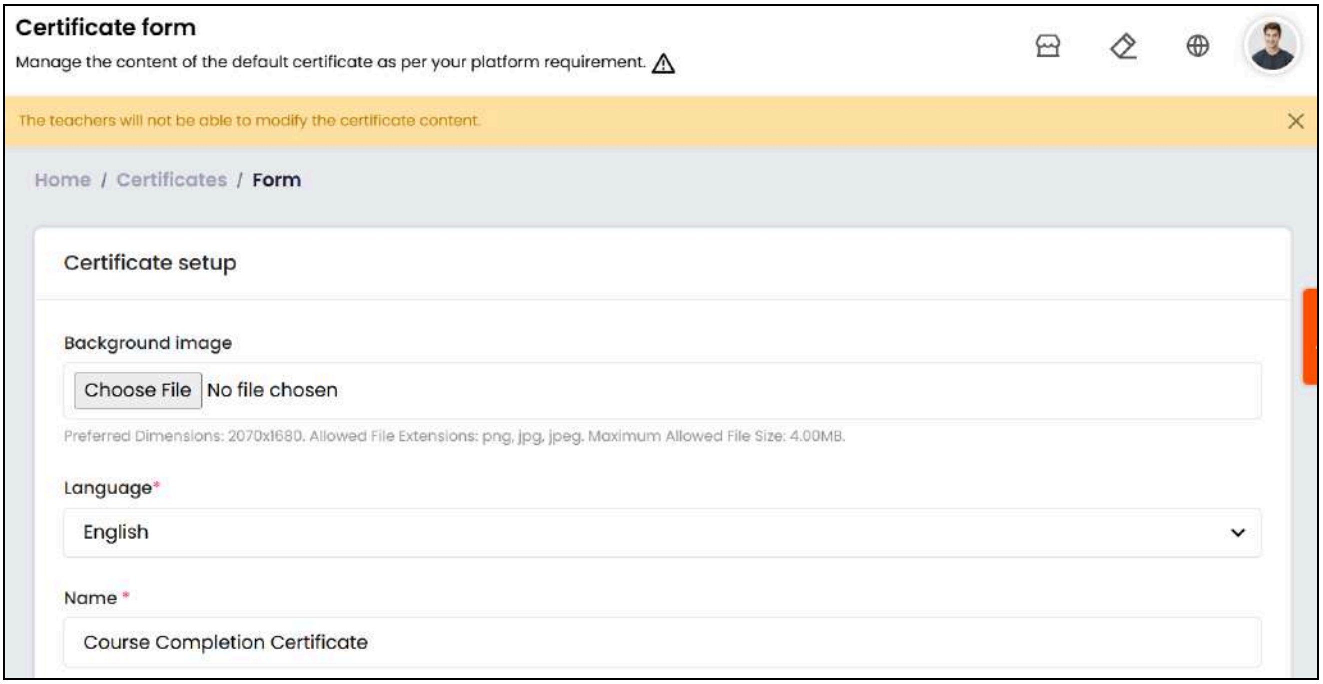
Action buttons

Under the **Action** column, each entry includes two action buttons, allowing you to perform specific actions.

The functions of each button are explained in detail below:

i. Edit

Click this to edit the certificate details. This will direct you to the **Certificate setup** form.



Review and/or update the following:

- **Background image:** Select a background image for the certificate. To do this, click Choose file.

  Select the image from your system, click **Open** and it will be uploaded.

  *Once the background image is uploaded in this field, it is saved automatically—there is no need to click **Save changes**.*

  Additionally, you cannot reset the image to the original once it has been replaced.

  Preview the uploaded background image under the **Body** field.

- **Language:** Select the preferred language.

  To do this, click the field and choose a language from the dropdown list. The certificate will open in the selected language.

  By default, the primary language is selected. Select each language one-by-one to update the certificate in all the system language(s).

- **Name*:** Review the name of the certificate. You can edit it if needed, but it is recommended to keep it as it is.

- **Body*:** Review the body of the certificate. The default content is already provided.

  However, you can modify it as needed. To edit a section, select it and make the necessary changes directly.

  Most of the content in the certificate must use replaceable variables to generate personalized certificates for each user.

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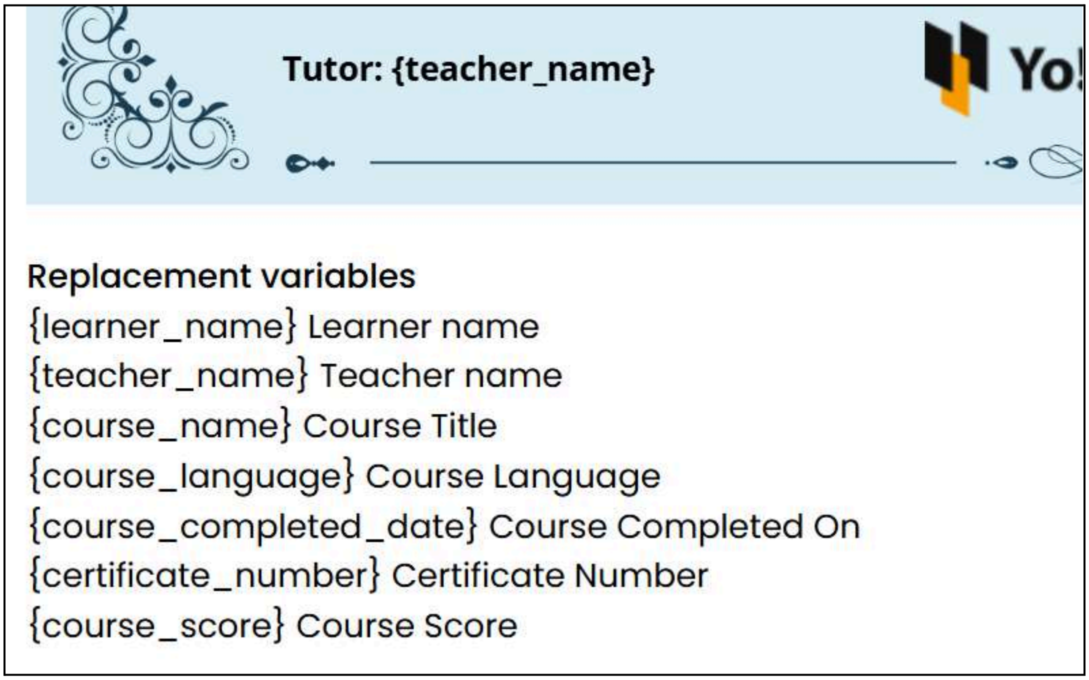
Refer to the replacement variables list below the **Certificate Body** field to select the correct variables for the respective certificate.



*Do not edit the content inside curly brackets **{ }**, as these brackets contain system variables. The system automatically replaces these variables with relevant information when generating the certificate based on the selected action.*

*For example, **{course_name}** is replaced with the name of the course associated with the certificate (e.g., English Grammar Basics).*

- **Status:** Select the status of the certificate. Click the field and select "**Active**" to publish it on the platform, enabling it to be linked to quizzes.

  Select "**Inactive**" to temporarily hide the certificate; it will not appear in the certificate dropdown lists across the platform, preventing teachers from linking quizzes to it.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

- **Auto-translate into other languages:** Check mark this to automatically update the data for the secondary language(s). The data for the secondary language(s) will be auto-filled.

  This feature is available only if the Microsoft text translator API is configured under ***Settings > System configurations >*** *Third-party APIs.*

  If you prefer to manually fill in the secondary language(s) data, leave the checkbox unselected.

To preview the certificate, click **Save & preview**. A preview of the certificate with dummy details will open in a new tab (as shown below) in a PDF format allowing you to download it as well.

Review the preview and close the tab. Back on the form, click **Reset to default** to restore the certificate content to its default state.

After making all updates, click **Save changes** to apply them to the certificate.

ii. Preview →

Click this to preview the certificate without having to open the setup form. A preview of the certificate will open in a new tab (as shown in the image above).

Review it and close the tab.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

11. Settings

This module contains the core settings that control both the front end and back end of the platform. Use it to configure how the platform behaves and appears for users and you.

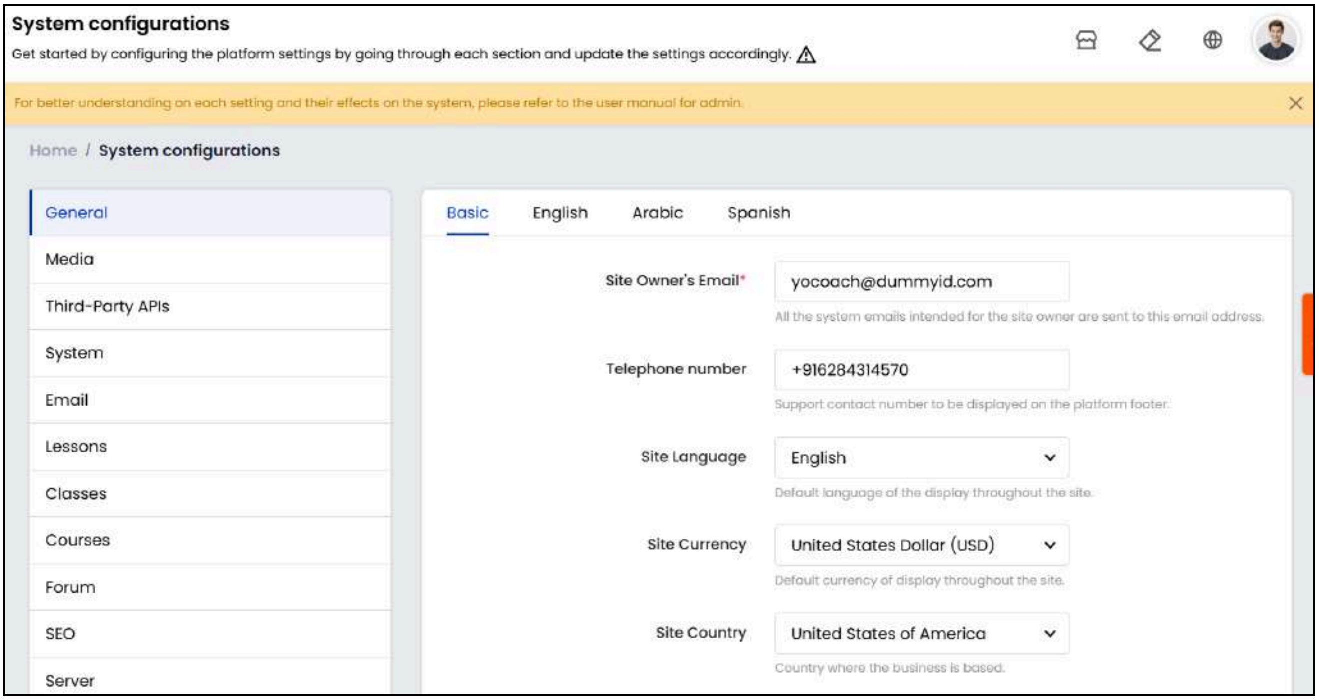
Expand the module to view its submodules. Click a submodule to open its dedicated settings page.

Each submodule is described in detail to help you configure the platform effectively.

11.1 System configurations

Use this submodule to manage key configuration settings that control the overall behavior of the platform. These general settings affect both system-wide operations and user-facing functionality.

To simplify navigation, all configuration settings are grouped by type. A scrollable vertical navigation panel appears on the left side of the screen, displaying each configuration type as a separate tab.



DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

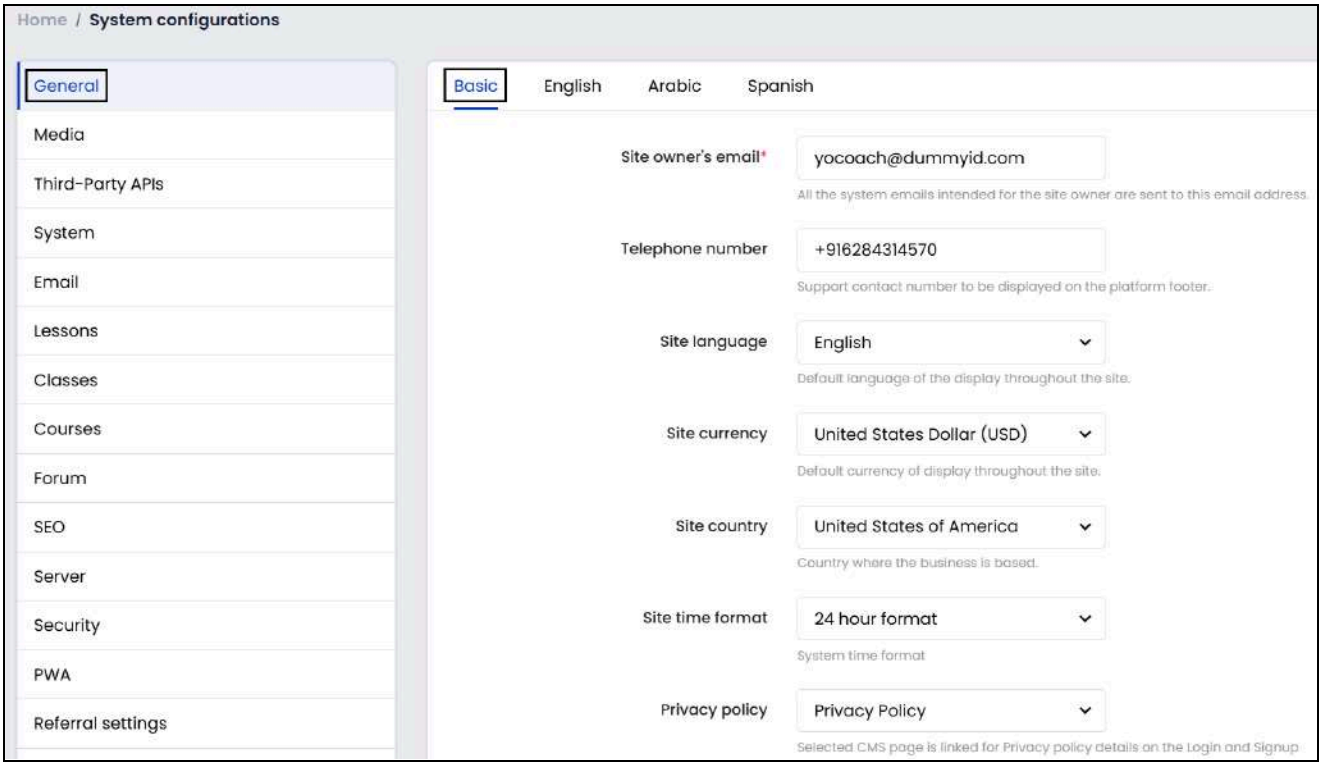
Select a tab to view its associated settings in the panel on the right. From there, you can review and modify individual settings as needed.

Each configuration type is explained in the sections below to help you understand its purpose and impact.

11.1.1 General

Configure your business profile and essential website settings, including the company name, contact information, business address, default time format, country of operation, the site's default currency and more.

These settings ensure the platform reflects accurate business details and functions according to regional preferences.



This form is divided into multiple tabs for organized input. The first tab is the Basic tab, which contains the main configuration fields.

It is followed by the Primary language tab (English by default), and then the secondary language tabs. The number of secondary language tabs depends on how many languages are available on your platform.

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The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

Basic tab

Update the following:

- **Site owner's email*:** Enter or update the business email address to receive system-generated emails and test messages triggered by clicking the "**Click here to test email**" link on the platform.

- **Telephone number:** Enter or update the business telephone number to have it displayed on the Contact Us page and the platform's footer, alongside the email address.

- **Site language:** Select the default site language from the dropdown list. The list will only display languages that have been added and activated on the platform.

  To add more language options, please contact the support team.

- **Site currency:** Select the site currency from the dropdown list. This currency will be displayed across the platform for users to view prices and amounts. By default, USD is selected.

  *The dropdown shows only currencies that are added and marked as active in the system. To manage them, go to **Settings > [Currency management]**.*

  Points to note:

  - *The **site currency** is used for display purposes only. It does not affect actual transactions on the platform.*
  - *The **default currency**, used for all platform transactions, is configured during system setup and cannot be changed from the admin panel.*
  - *Users can change their display currency to any active currency available on the platform, regardless of the site currency set.*

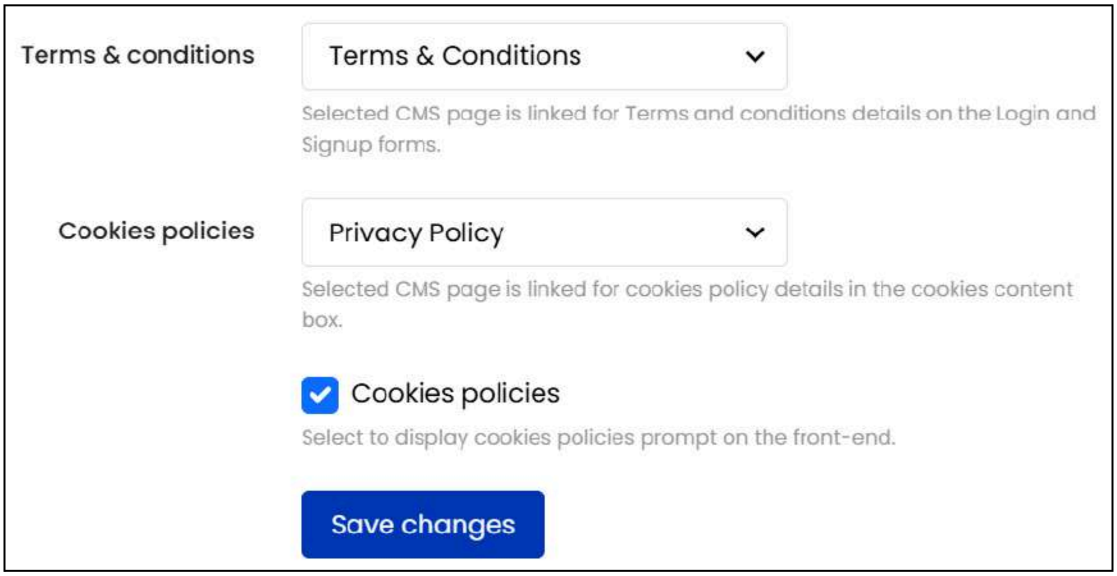
- **Site country:** Select the country where your business is registered by clicking the field and choosing from the dropdown list of available countries.

- **Site time format:** Select the time format from the dropdown list. This format will be used consistently for all timezones across the platform.

- **Privacy policy:** Select the content page to be displayed as the **Privacy policy** page from the dropdown list. To do this, click the field to view a list of all active content pages, and choose the appropriate one.

  *Manage all content pages from **CMS > [Content pages]**.*

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.



- **Terms & conditions:** Select the content page to be displayed as the **Terms & Conditions** page from the dropdown list.

  To do this, click the field to view a list of all active content pages, and choose the appropriate one.

  *Manage all content pages from **CMS > [Content pages](#)**.*

- **Cookies policies:** Select the content page to be displayed as the **Cookies Policy page** from the dropdown list.

  To do this, click the field to view a list of all active content pages, and choose the appropriate one.

  This page is displayed when a user clicks the **Read more** link in the **Accept Cookies** message shown at the bottom on any page on the front-end.

*Manage all content pages from **CMS > [Content pages](#)**.*

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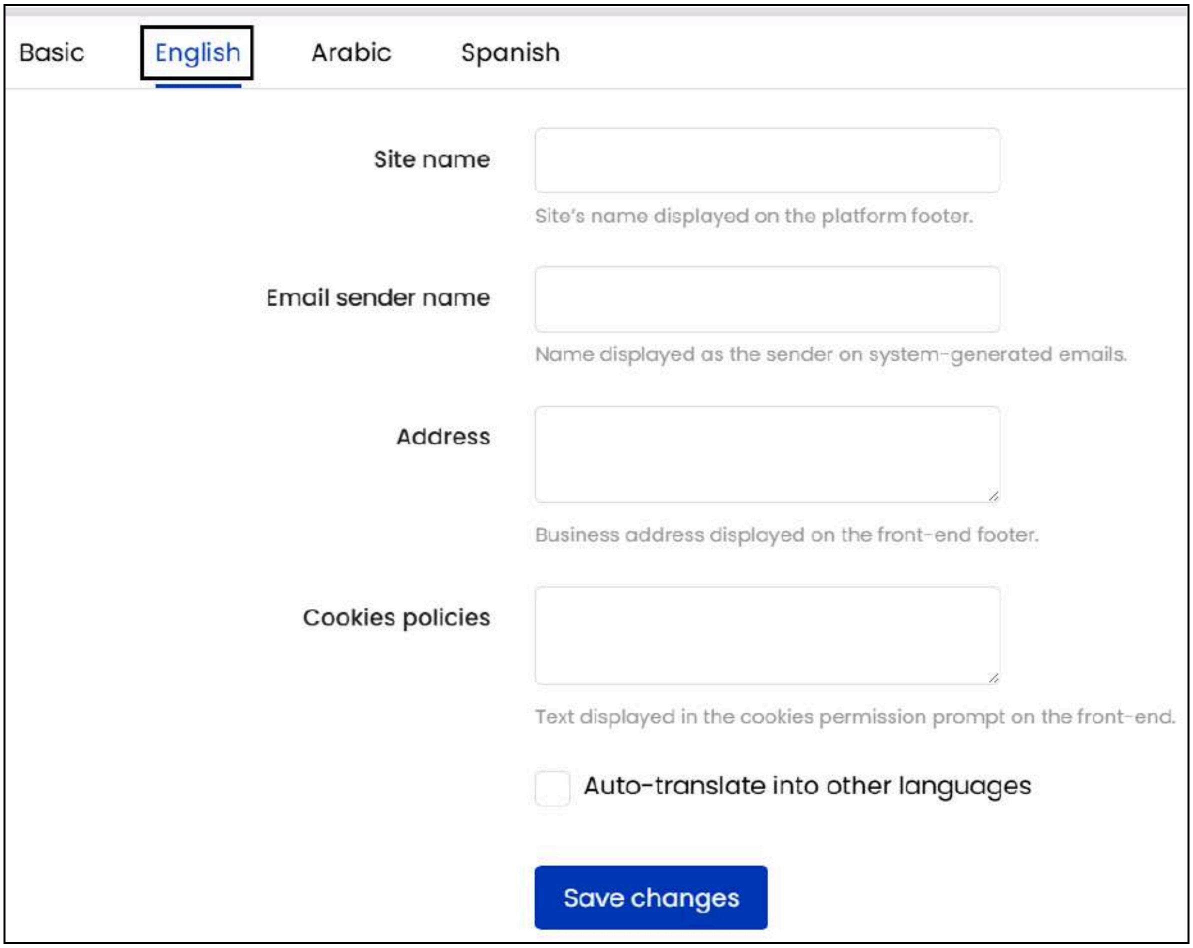
- **Cookies policies:** Check mark this to display the **Cookies policy section** on the front end (as shown in the image above).

Click **Save changes.**

English tab

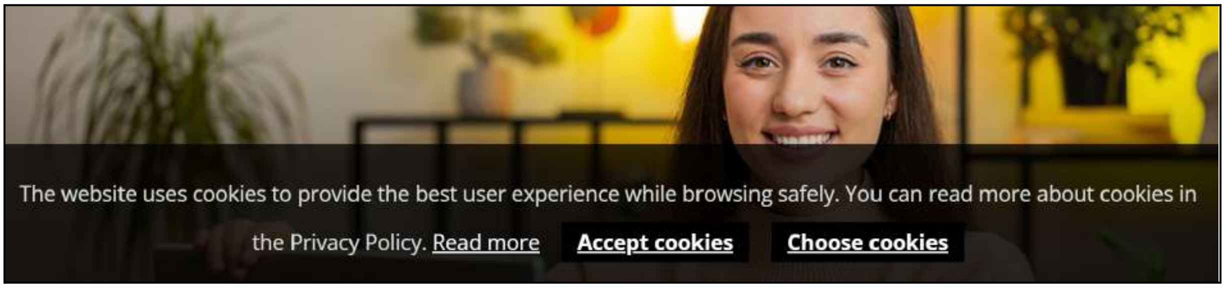
Click **English** to go to the primary language data tab (English tab, since **English** is set as the primary language).



Update the following:

- **Site name:** Enter the name of the business. This name will be displayed in many places on the platform, including the copyrights' text.
- **Email sender name:** Enter the name that will be used as the sender's name for every email sent from the platform to any user (including you - the admin).

- **Address:** Enter your complete registered business address, including the street name, city, state, and pin code.
- **Cookies policy:** Add the text that will be displayed with the Cookies policy link asking the users to Accept cookies or set their cookie preferences.



- **Auto-translate into other languages:** Check mark this to automatically update the secondary language(s) data. The data in the subsequent language tab(s) will be auto-filled.

  *This feature is available only if the Microsoft text translator API is configured under **Settings > System configurations >** Third-party APIs.*

  If you prefer to manually fill in the secondary language(s) data, leave the checkbox unselected.

Click **Save changes**.

The next tab(s) will be the secondary language tab(s) (Arabic, Spanish, etc.), which include the same fields as the English tab.

*If you had selected the auto-translate option, the secondary language tab(s) will be prefilled. Review the data, make any necessary edits, click **Save changes**, and close the form.*

*If you did not use the auto-translate feature earlier, use the **Auto-translate & fill language data** button beside the **Save changes** button on each secondary language tab to auto-fill the secondary language fields. Then, click **Save changes**, and move to the next tab, or close the form.*

*If you do not want to fill the secondary language tab(s) at this time, complete only the primary language tab (English tab), click **Save changes**, and close the form.*

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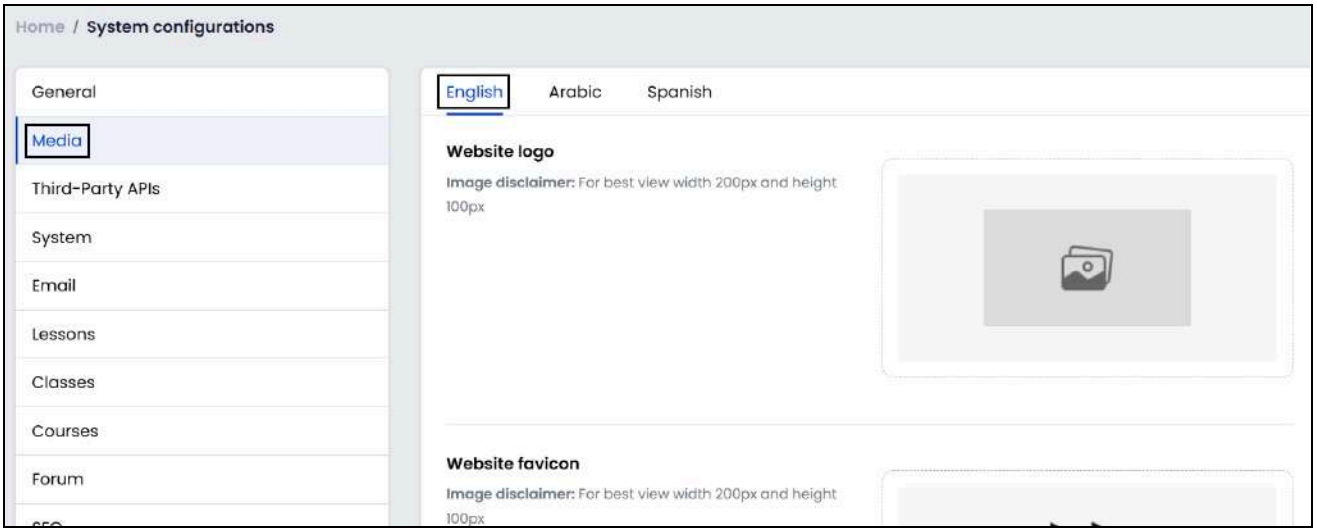
11.1.2 Media

Use this form to upload the platform's branding and media elements, such as logos, favicons, and blog banners.



This form is divided into multiple tabs based on the number of languages available on the platform, allowing you to upload language-specific images.

The first tab is the [Primary language](#) tab ([English](#) by default), followed by the secondary language tabs.

The number of secondary tabs depends on the languages enabled on your platform.

Uploading media files

All fields under this section are media fields and follow the same upload process.

To upload an image, hover over the image field and click .

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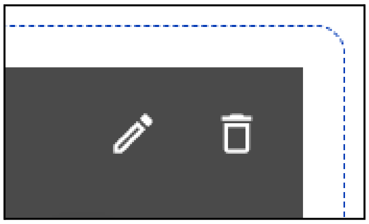
Select the image from your system and click **Open** to upload it to the platform.

To change the uploaded image, hover over the image field again.



Two buttons will appear:

- Click  to upload a different image.
- Click  to remove the image and leave the field blank.

English tab

Upload the following images under this tab using the process described above:

- **Website logo:** Upload the website logo that will be used on the website's header section and on the teacher's, learner's, and affiliate's dashboard.
- **Website favicon:** Upload the website favicon image to be displayed beside the website title on the browser tab.

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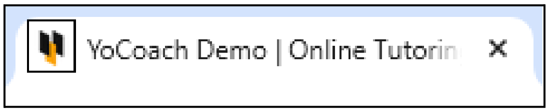
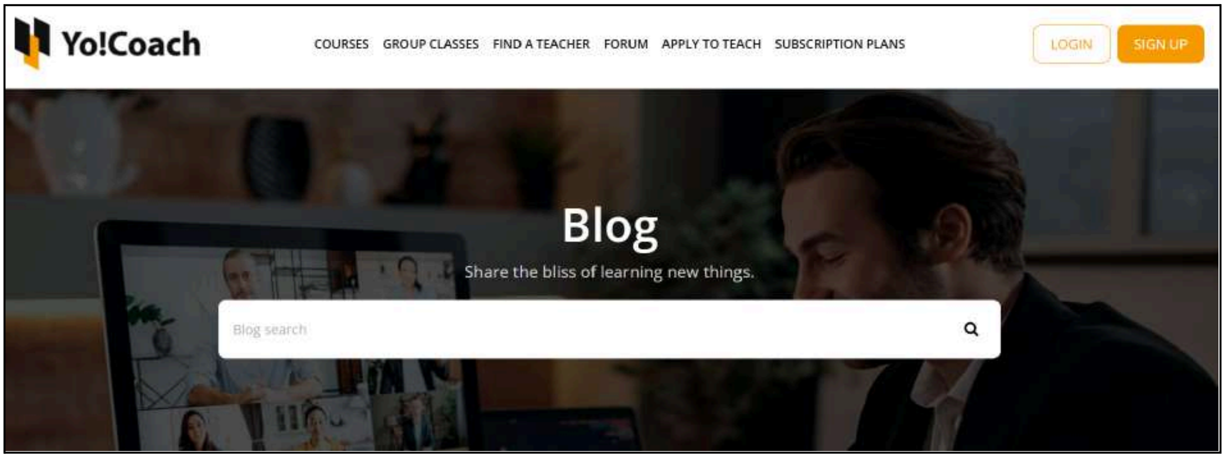
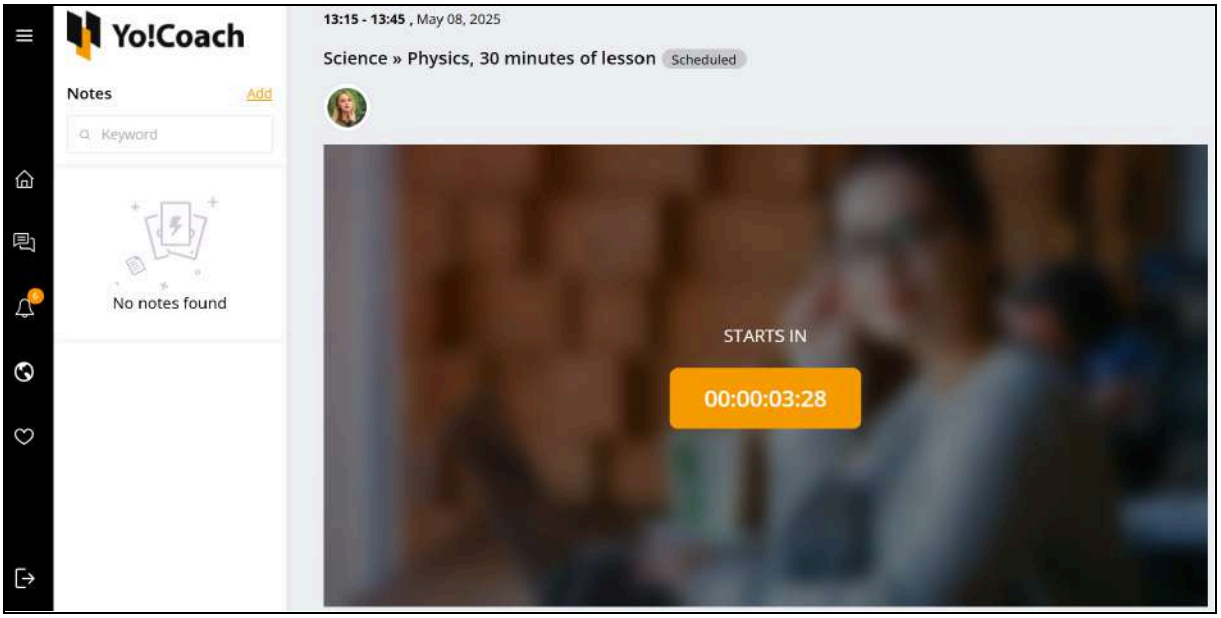


A favicon is a graphic image (icon) associated with a particular web page and/or website.

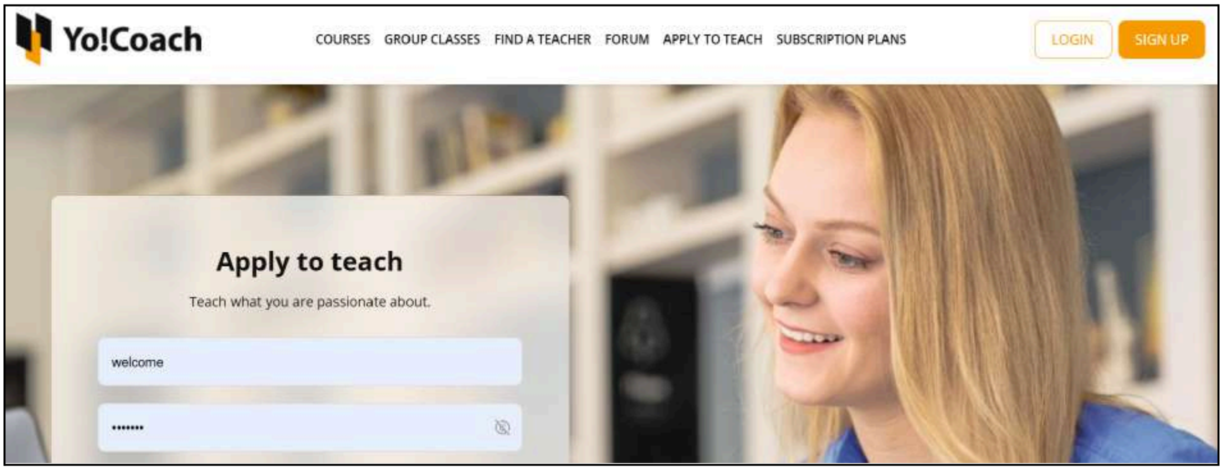
- **Blog banner:** Upload the banner image that appears at the top of the blog page on the front end.



- **Lesson banner:** Upload the banner image displayed on the waiting screen before a lesson begins.



- **Apply to teach banner:** Upload the banner image that appears at the top of the **Apply to teach** page on the front end.



- **Certificate logo:** Upload the logo that will be used on the certificates given to users from the platform.

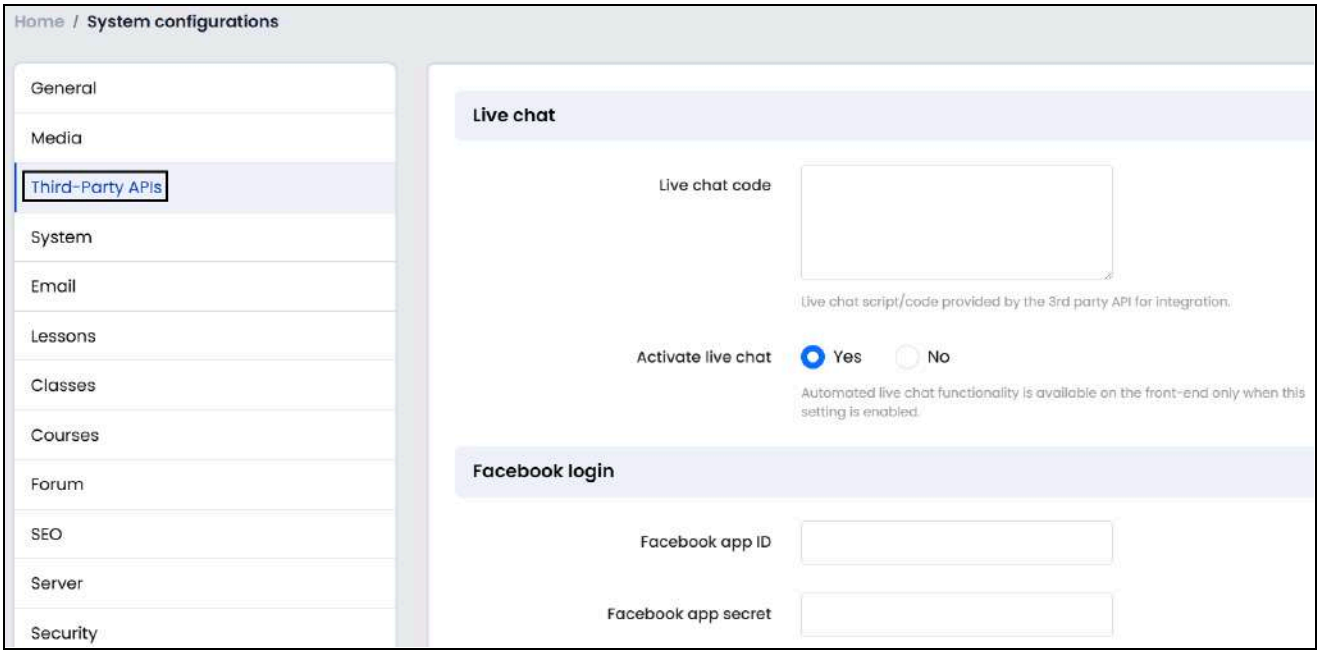
- **Affiliate registration page banner:** Upload the banner image that appears at the top of the **Affiliate registration** page on the front end.

*This form does not include a **Save changes** button, as media files are saved automatically upon upload.*

Once all files have been updated, move to the next tab to update its settings.

11.1.3 Third-Party APIs

Set up third-party APIs under this form to support smooth website operations, including integrations like Google Maps, Facebook login, and more.



Multiple APIs are listed on this page—configure the ones relevant to your platform as needed.

You DO NOT have to update all the third-party APIs under this section.

*Update only those third-party APIs that you need and then click **Save changes**.*

i. Live chat

Configure and activate the live chat API on the platform, where a live support chat section will be visible on the front end of the platform to help users reach out to you faster and get solutions easily.

To do this, update the following using the keys you generated from the APIs' platform:

- **Live chat code:** Generate and enter the live chat code or script to activate the live chat feature on the platform.

- **Activate live chat:** Select 'Yes' to activate the live chat feature and select **'No'** to leave it inactive.

  Ensure you update this setting after adding the live chat code in the field above to activate the feature on the platform.

Click **Save changes** to update it.

ii. Facebook login

Configure the Facebook social login API to allow users to use their Facebook credentials to log into or register on the platform.

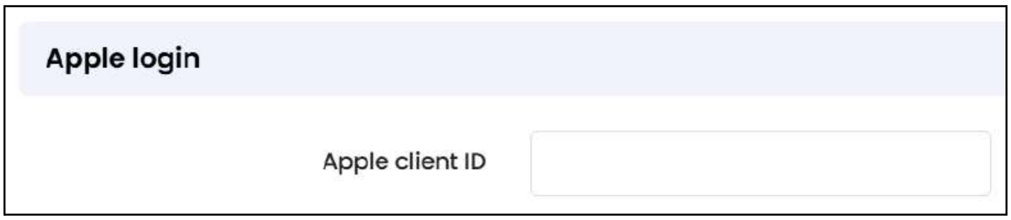
Once generated, update the following:

- **Facebook app ID*:** Enter the generated key.
- **Facebook app secret*:** Enter the generated key.

Click **Save changes** to update it.

iii. Apple login

Configure the Apple login API to allow users to sign into or register on your platform using their Apple credentials.



Generate the client ID key and add it in this field.

Click **Save changes** to update it.

iv. Newsletter subscription

Newsletter subscription allows you to collect customer email addresses to send marketing messages and promotional offers.

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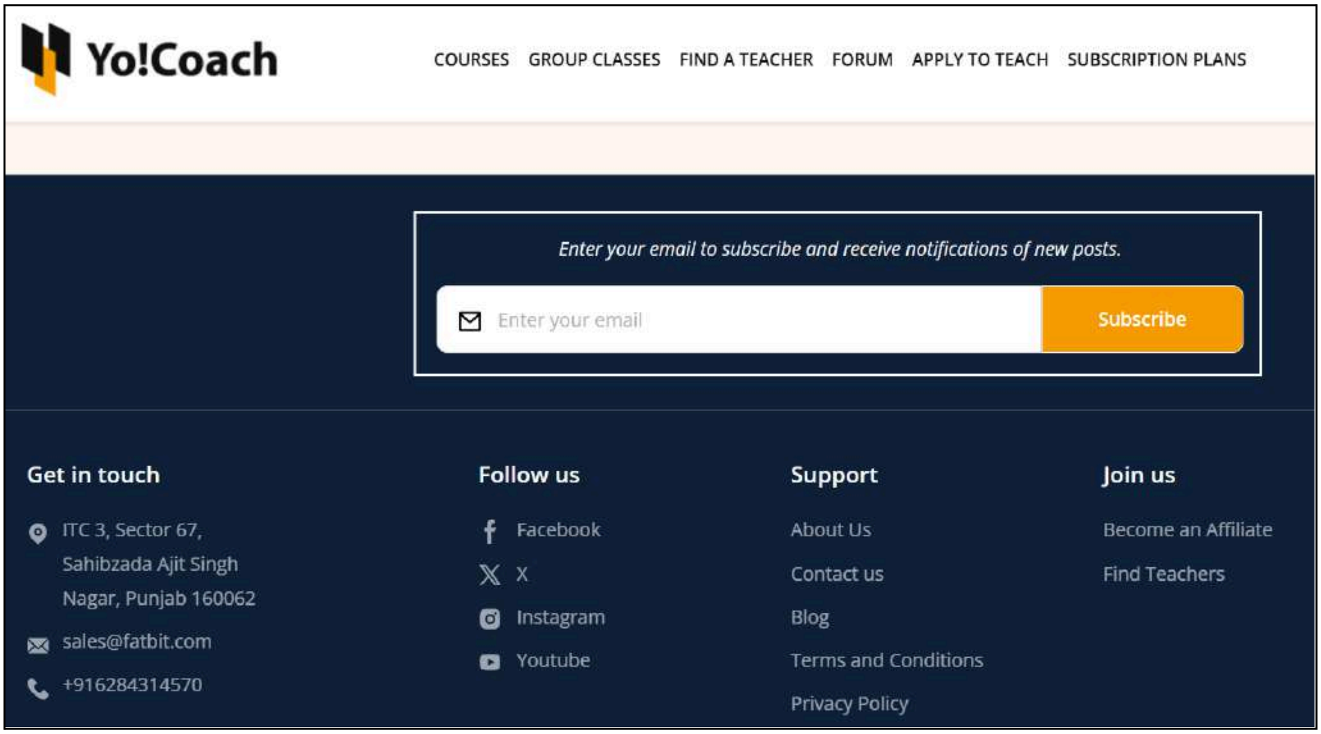
To enable this feature, configure the Mailchimp API—an email marketing service—under this form.

Once configured, a subscription section will appear at the bottom of every page on the platform, where users can enter their email address and click **Subscribe**.



When a user subscribes, their email address is automatically sent to the connected email marketing plugin.

You can then create and manage newsletters from your Mailchimp dashboard.

*Before you configure the Mailchimp API, ensure that the newsletter subscription feature has been activated under **System configurations > System tab**.*

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Generate the Mailchimp key and list ID from their platform. Then, fill the following two fields accordingly:

- **Mailchimp key:** Enter the Mailchimp application key.
- **Mailchimp list ID:** Enter the Mailchimp subscribers list ID.
- **Mailchimp server prefix:** Enter the Mailchimp server prefix.

  This is a part of the Mailchimp API key that identifies the data center associated with your account. It typically appears after the dash in your API key.

  For example, if your API key is: ab1234567890-us7

  Then the server prefix is: us7.

Click **Save changes** to update it.

v. Microsoft text translator

Configure the Microsoft Translator Text API to activate the auto-translate feature on the platform, allowing real-time translation of text from one language to another.

Generate the subscription key from the Microsoft platform. Enter the generated key in the **Subscription key** field.

Click **Save changes** to update it.

vi. Google Analytics

Configure the Google Analytics API to extract tracking data and display it directly on the admin dashboard.

*This API functions only if the site tracker code has been added under **Settings > System configurations >** [SEO](SEO).*

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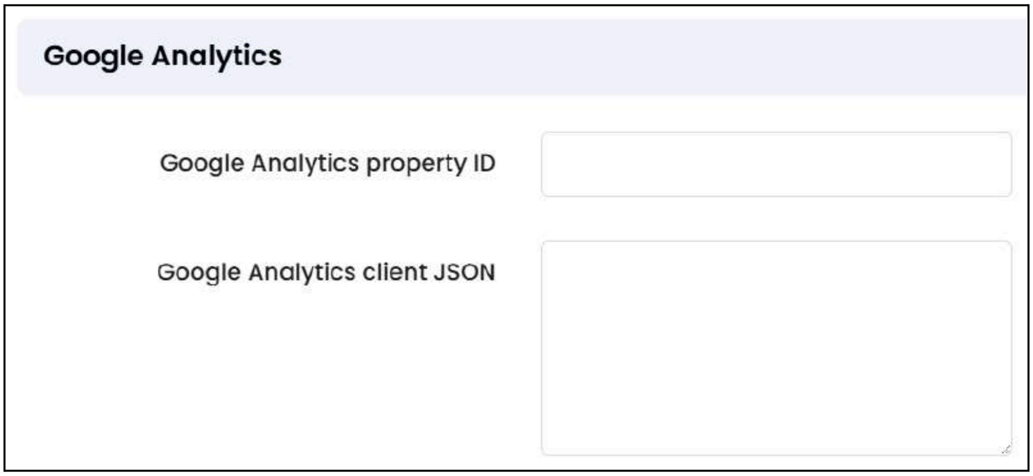
Points to note:

- Google Analytics helps track platform traffic and user activity after the site tracking code is added under the [SEO](#).
- Tracked reports are accessible on the Google Analytics dashboard.
- To display traffic data on the admin dashboard, the GA4 API must be configured.
- Once configured, the data appears under the Traffic widget on your admin dashboard.



Update the following fields with the generated keys for the API:

- **Google Analytics property ID:** Enter the property ID obtained.
- **Google service account JSON:** Enter the JSON key obtained for the service account.

Click **Save changes** to update it.

vii. Google reCAPTCHA API

Google reCAPTCHA v2 helps detect abusive traffic on your website by verifying that actions are performed by real users, not bots. It typically presents a simple checkbox—**"I am not a robot."**

On **Yo!Coach**, when activated, the Google reCAPTCHA v2 feature is used on key forms at the front end, such as **Sign Up**, **Forgot Password**, and other forms involving critical user actions like logging in or resetting credentials.

Generate the keys for the Google reCAPTCHA v2 API and add then to the following fields:

- **Site key:** Enter the site key generated.
- **Secret key:** Enter the secret key generated.

Click **Save changes** to update it.

viii. Google login

Configure the Google login API to allow users to log in or register on the platform using their Google credentials.

Generate the keys from the API platform and then, add the **Google client JSON** obtained in this field.

Then, click the "**click here to authorized**" link to synchronize the platform with the updated API.

Click **Save changes** to update it.

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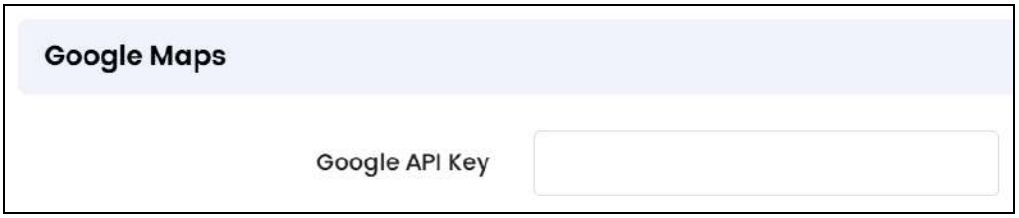
ix. Google Maps

Configure the Google Maps API to embed Google Maps on your website.

This will allow users to detect their location, add their address easily and a lot more.



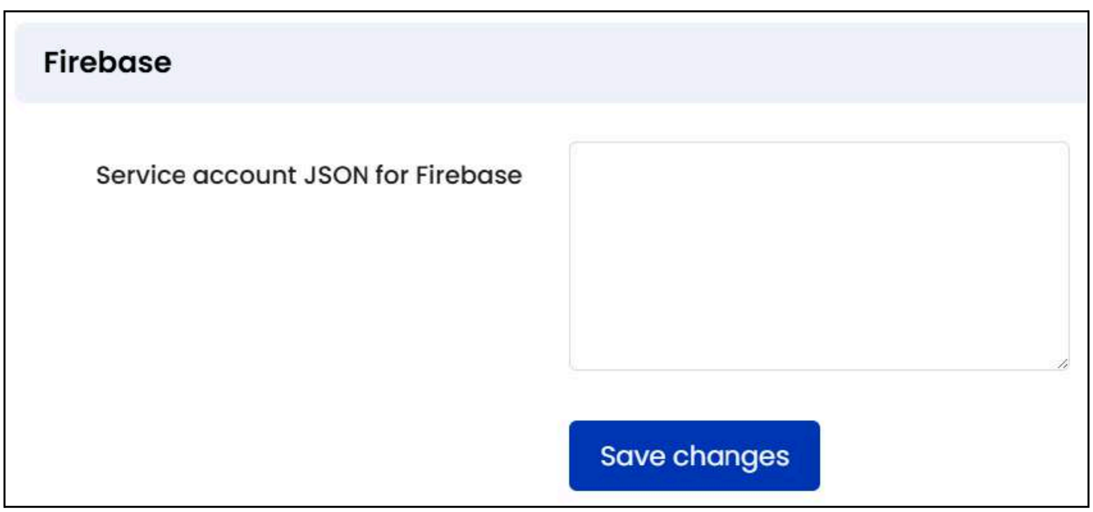
Generate the key for the API from the applicable platform, and then, enter it in this field.

Click **Save changes** to update it.

x. Firebase

Configure this API to enable the system to send system-related push notifications to the mobile applications installed by users.

These push notifications include registration confirmations, order status updates, and other user-triggered alerts based on specific actions.



Update the following:

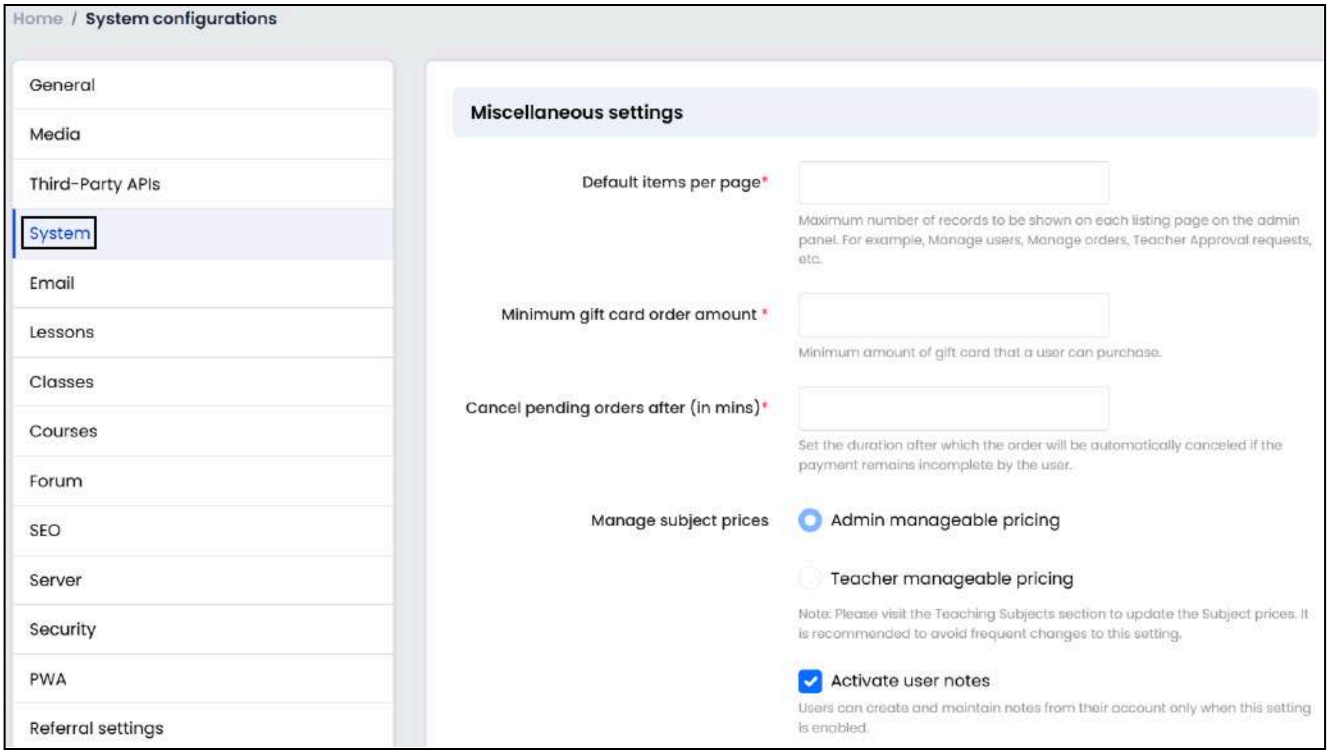
- **Google push notification API key:** Enter the Firebase Cloud Messaging (FCM) API key to activate push notifications.

Once done, click **Save changes** to update the details.

11.1.4 System

Set up the platform's core settings that define how the system will operate.

This includes managing subject prices, enabling or disabling course functionality, configuring user account settings, setting up escalation and issue reporting options, and more.



The settings under this form are divided into multiple sections based on their purpose and impact on the platform.

Each section is discussed below.

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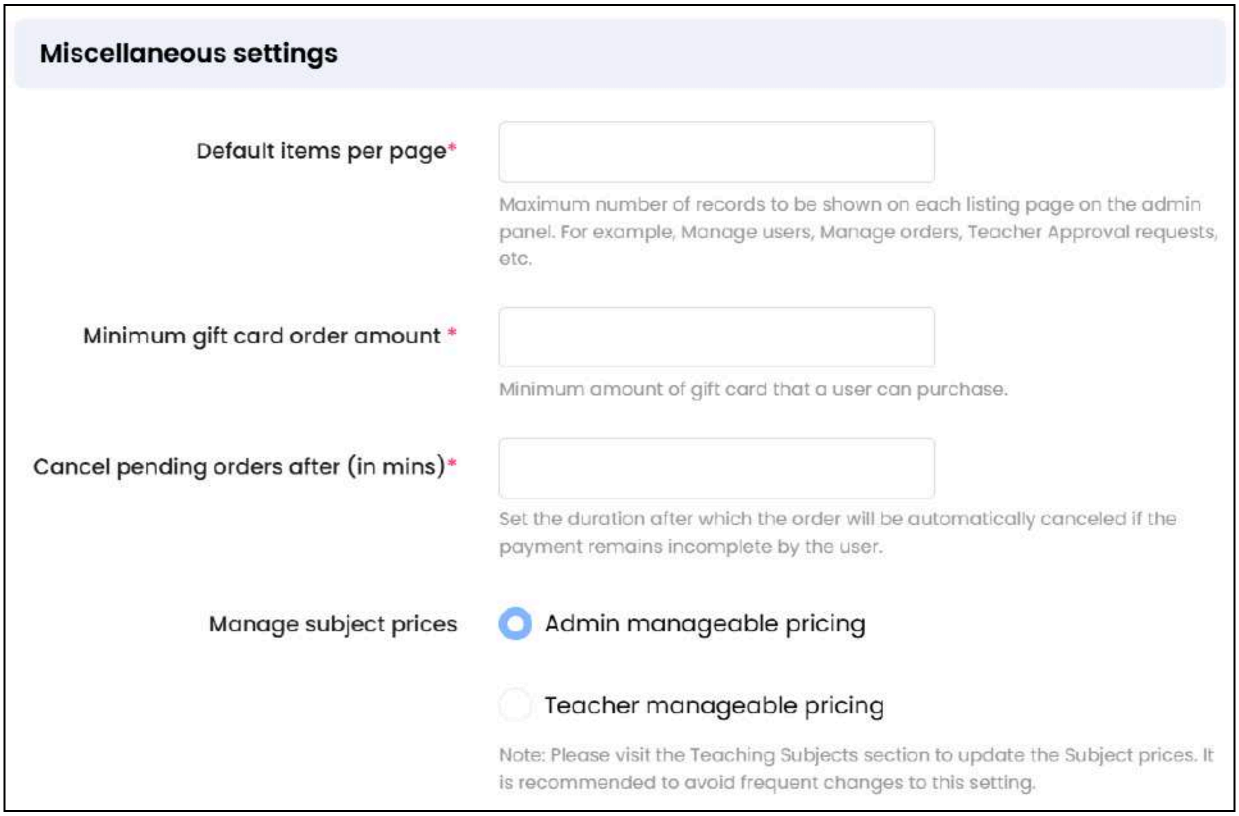
i. Miscellaneous settings



Update the fields as needed:

- **Default items per page:** Enter how many records should appear on listing pages in the admin panel, such as Users, Orders, or Teacher registration requests pages.

  The value added in this field cannot exceed 500, which means that the total items shown on one page will never be more than 500.

- **Minimum gift card order amount:** Enter the minimum value that a gift card can be when a user is purchasing it.

  Users will only be able to create or buy a gift card if the amount they enter is equal to or greater than this value.

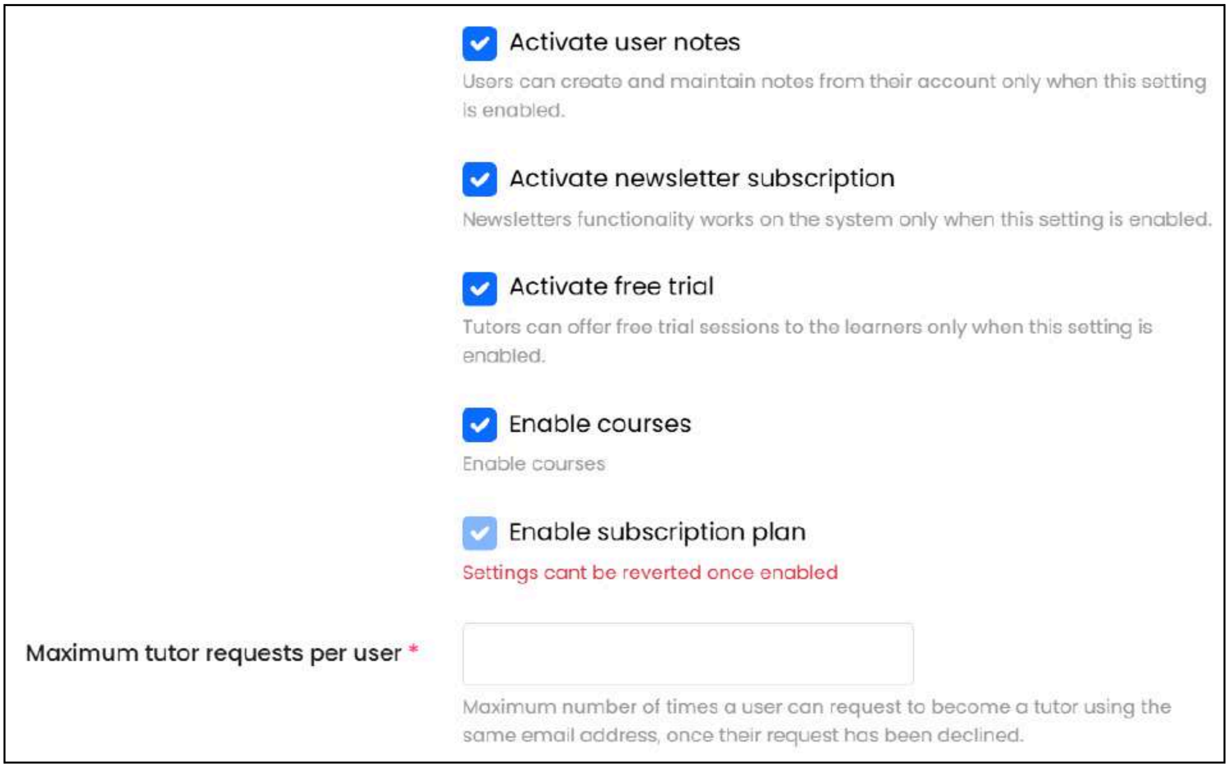
- **Cancel pending orders after (in mins):** Enter the number of minutes the system should wait before automatically canceling an order that was placed but not paid for.

  This helps keep order data clean by removing unpaid orders after a set time.

- **Manage subject prices:** Select who should control the hourly prices for the subjects (languages) taught on the platform.
    - **Admin manageable pricing:** Select this option to manage the lesson prices yourself as the system admin. Teachers will not be able to set or change their own prices.

      To define these prices, go to **Teacher preferences** > Teaching subjects.
    - **Teacher manageable pricing:** Select this option to allow teachers to set their own prices per subject.

      However, you will still be able to define a minimum and maximum price range that the teachers must follow. To configure the allowed price range, visit **Teacher preferences** > Teaching subjects.



- **Activate user notes:** Check mark this to let users create and save notes within their account panel.

  These notes can help users prepare for lessons, revise topics, or store important learning points for future reference.
- **Activate newsletter subscription:** Check mark this to display the newsletter sign-up section on the front end of the platform.

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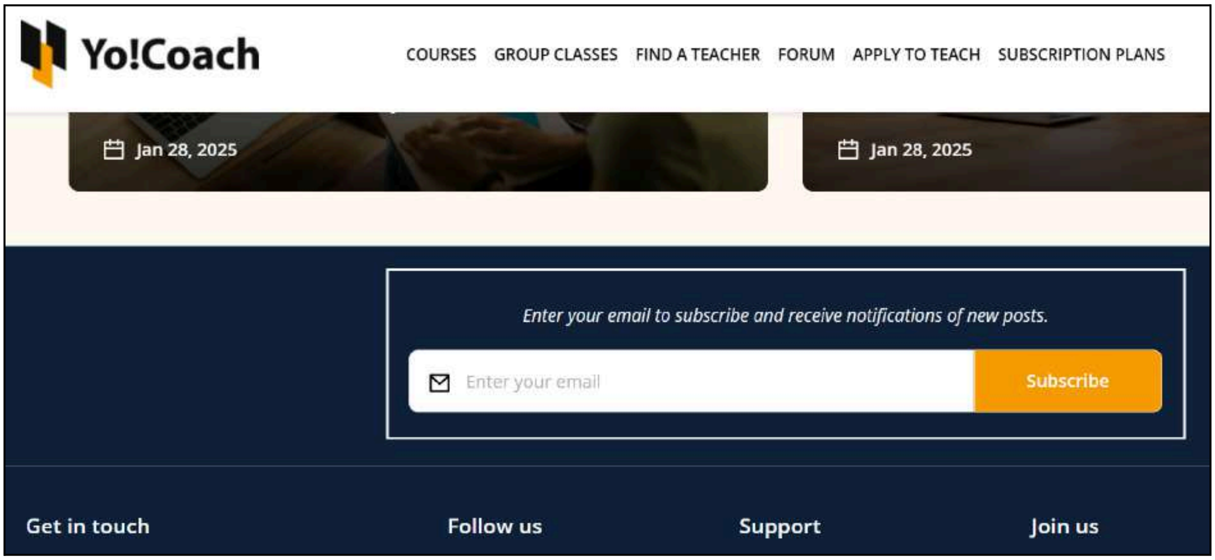
When activated, a newsletter subscription field appears at the bottom of each page, allowing users to enter their email addresses and subscribe.

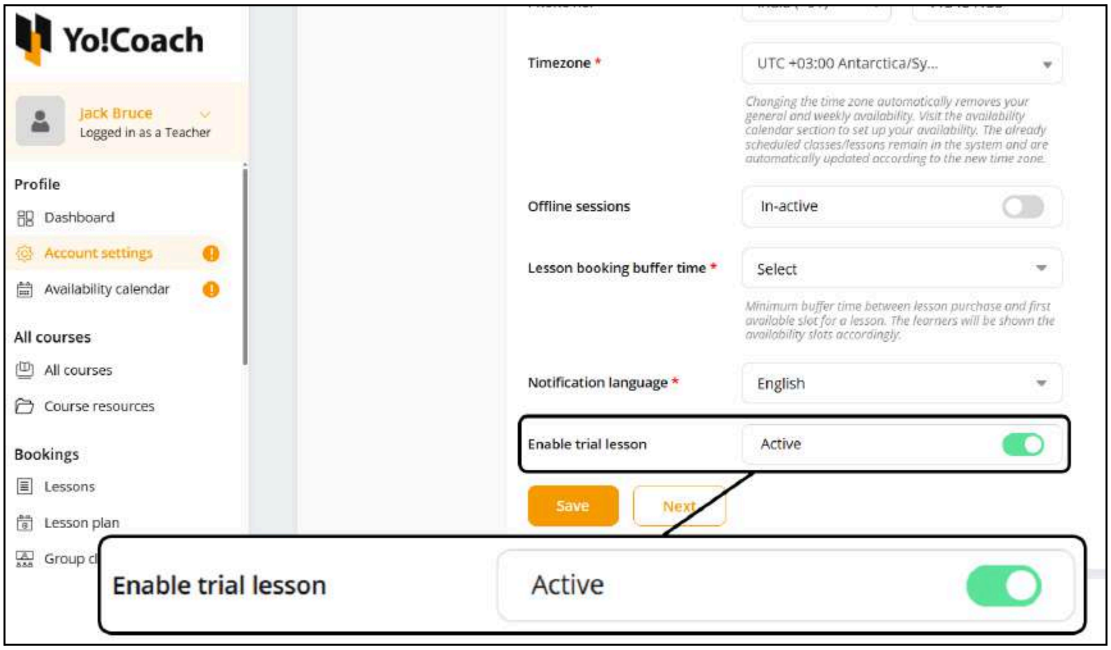


*This setting only activates the feature. To ensure it functions correctly, configure the required newsletter API under **Settings > System configurations >** [Third-Party APIs].*

- **Activate free trial:** Check mark this to allow teachers to offer free trial lessons.

  When this is active:

  - Teachers can activate or deactivate the free trial lessons feature for the lessons they offer in the Teacher panel under **Account settings > Personal information >** General **tab**.



DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
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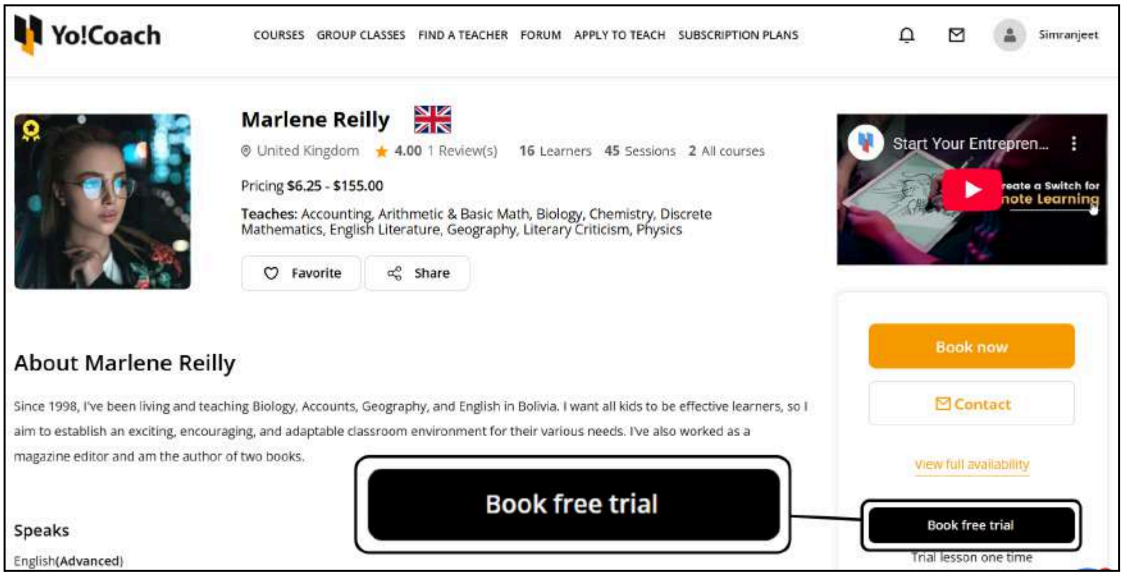
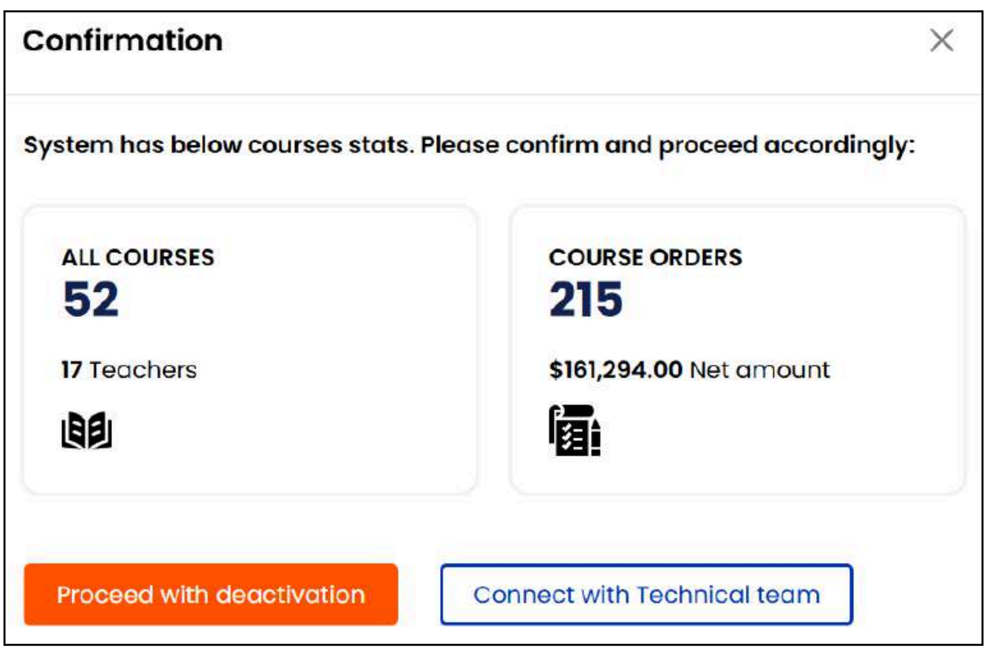
- Once a teacher activates this, the free trial option becomes visible to learners when booking a lesson with that teacher on the teacher details page. Learners can access this page from the front end by selecting **Find a teacher > clicking the teacher's profile image**.



- **Enable courses:** Check mark this to activate course functionality on your platform. This will allow teachers to create and manage courses on the platform.

  If you clear this checkbox to deactivate courses, a confirmation message appears, showing the number of active courses and course orders in the system.



  You can take the following actions here:

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- **All courses:** Click this section and you will be directed to the **Courses** > [All courses]() page.

- **Course orders:** Click this section and you will be directed to the **Orders** > [Courses orders]() page.

- **Proceed with deactivation:** Click this button to deactivate all courses and hide related data. These records are saved, but they cannot be accessed unless the courses module is reactivated again.

- **Connect with Technical team:** Click this button and a contact form will open.

Enter your concern in the message box and click **Submit**. The team will review and reach out to assist you.

*After deactivation, all course-related modules (like [Courses](), [Course orders](), [Courses]() tab under **Settings** > [System configurations](), etc.) are hidden.*

*However, the **Courses** link in the homepage header stays visible until you manually remove it from **CMS** > [Navigation menus]() > **Header bar** - [Navigation menu items]() **button**.*

- **Enable subscription plan:** Check mark this to activate the subscription module on the platform.

  This enables you to create and manage subscription-based pricing models.

  This option is permanent. Once enabled, it cannot be turned off.

- **Maximum tutor requests per user*:** Enter the number of times a user can apply to become a tutor using the same email address.

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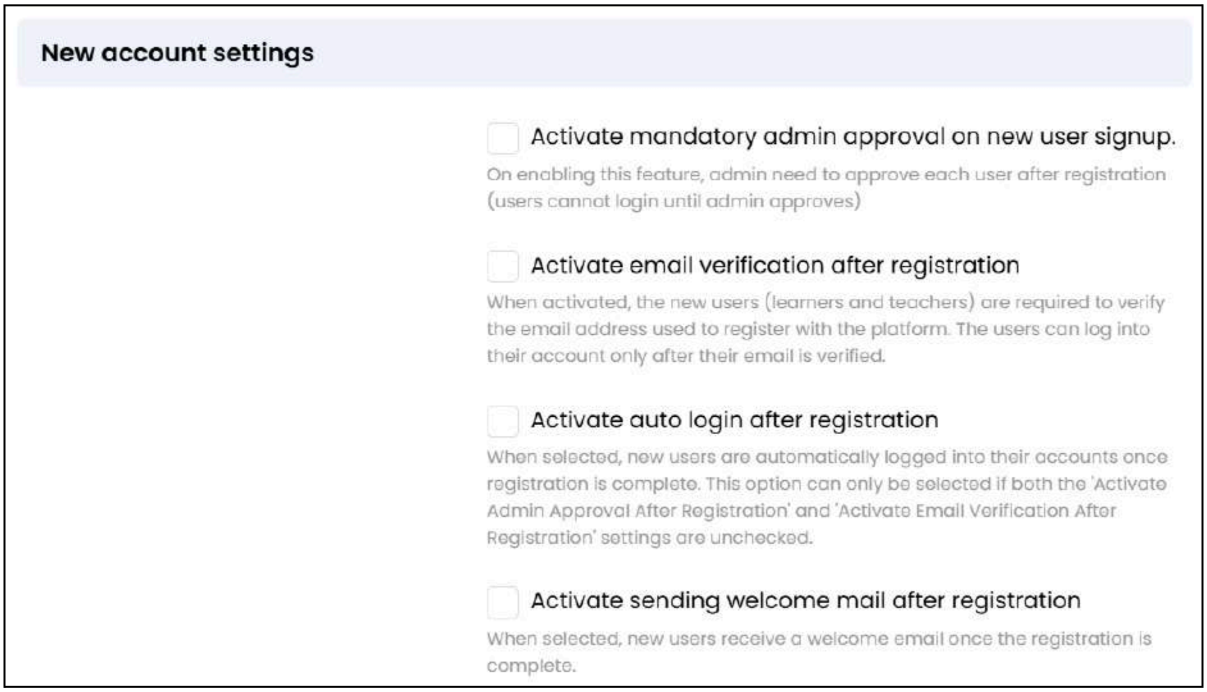
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

Once the defined limit is reached and all requests are rejected, the user will no longer be able to submit additional tutor applications with the same email address again.

ii. New account settings



Update the following:

- **Activate mandatory admin approval on new user signup:** Check mark this to make admin approval mandatory for new user registrations.

  Users cannot access their accounts until an admin manually approves them.

  There is no separate module for managing approval requests triggered by this setting. To approve a user, go to **Users** > Platform users, and activate the user's account by switching the **Status** toggle button.

- **Activate email verification after registration:** Check mark this to make email verification necessary after registration.

  Users must verify their email address before they can log in.

- **Activate auto login after registration:** Check mark this to automatically log users into their account after they complete the registration.

  This option can be selected only if the following are deactivated:

- Activate mandatory admin approval on new user signup
- Activate email verification after registration

- **Activate sending welcome mail after registration:** Check mark this to automatically send a welcome email after a user's registration is complete.

iii. Report/Escalate issue time post session completion

Update the following:

- **Time allowed to report an issue [in hours]:** Enter the number of hours users are allowed to report an issue after a session ends. For example, if this is set to 4, users can report an issue only within 4 hours after the session is completed.
- **Time allowed to escalate an issue [in hours]:** Enter the number of hours users are allowed to escalate an issue after the teacher resolves it. For example, if this is set to 8, users can escalate the issue only within 8 hours of the teacher's response.

  The **escalation window begins** only after the teacher has taken action on the reported issue.

! *To disable issue reporting or escalation, set both values to 0.*

iv. Wallet

<u>**DISCLAIMER:**</u> The color theme and labels may differ in the screenshots compared to those on the platform.
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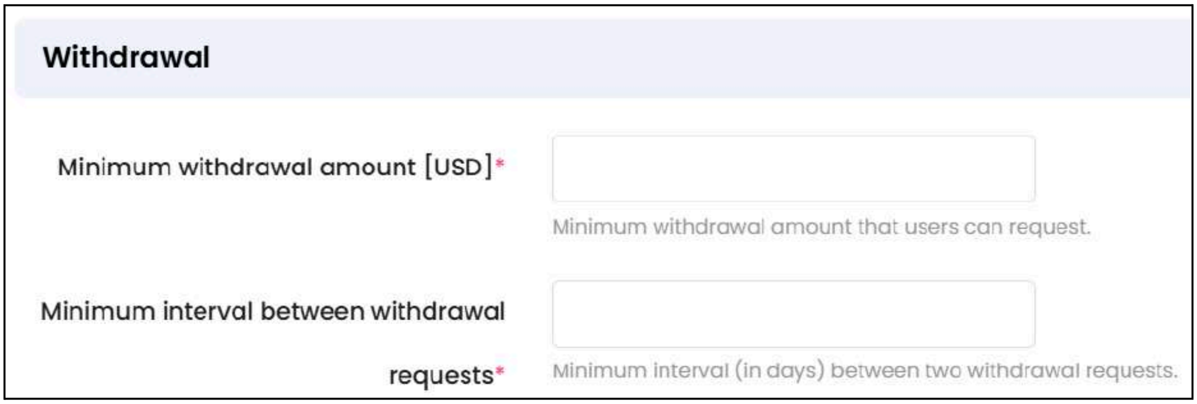
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

Update the following:

- **Minimum recharge amount [USD]:** Enter the minimum amount that users must add to recharge their wallet.

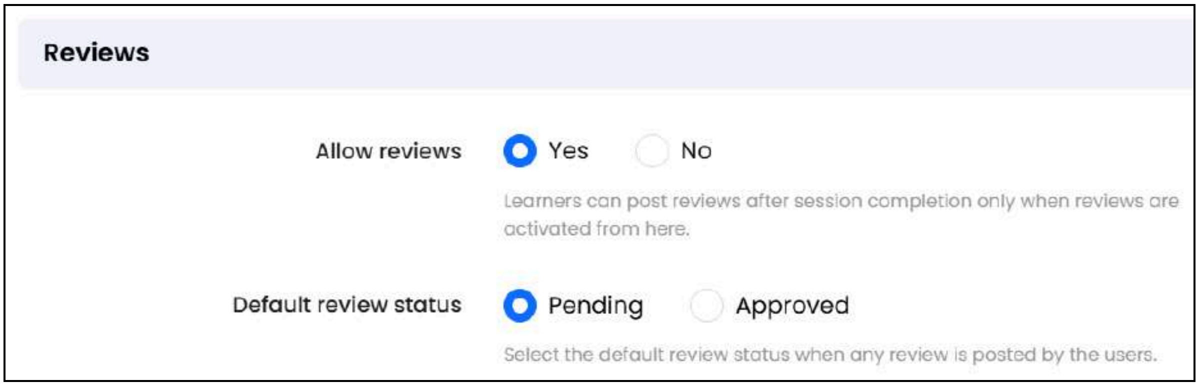
v. Withdrawal



Update the following:

- **Minimum withdrawal amount [USD]:** Enter the minimum amount users must have to request a withdrawal from their wallet.
- **Minimum interval between withdrawal requests:** Enter the minimum number of days that must pass between two withdrawal requests.

vi. Reviews



Update the following:

- **Allow reviews:** Select 'Yes' to allow users to post reviews after a session.

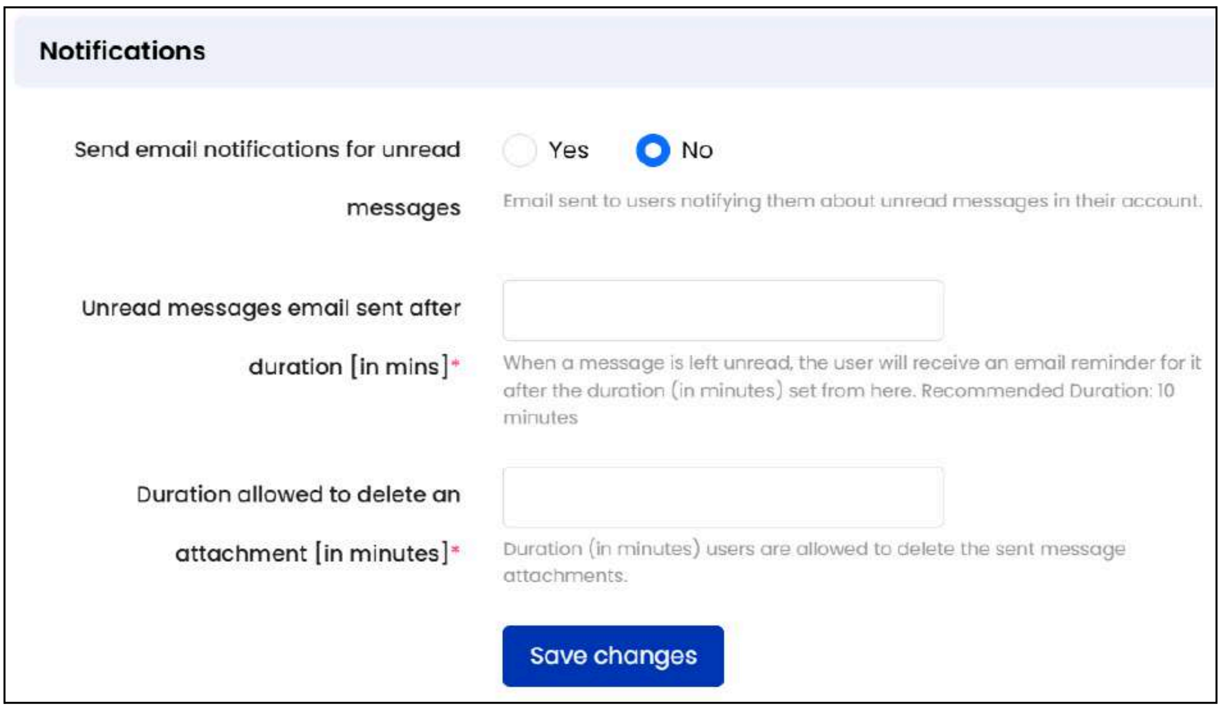
Select ‘**No**’ to disable reviews and hide the review section on the platform.

- **Default review status:** Select the default review status for newly submitted reviews:
    - **Pending:** Select this option to keep new reviews in a pending state until an admin approves them.

      Manage pending reviews from **Users** > [Teacher reviews & ratings]().
    - **Approved:** Select this option to publish new reviews immediately without requiring admin approval.

      You can still change the status of an approved review from **Users** > [Teacher reviews & ratings]().

vii. Notifications



Update the following:

- **Send email notifications for unread messages:** Select ‘**Yes**’ to send users an email notification if they leave a message unread.

  Select ‘**No**’ if you do not want to notify users about their unread messages.

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- **Unread messages email sent after duration [in minutes]*:** Enter the number of minutes the system should wait before sending an email about an unread message. The minimum recommended duration is 10 minutes.
- **Duration allowed to delete an attachment [in minutes]*:** Enter the number of minutes within which users can delete an attachment from a sent message.

  This setting is always active and cannot be turned off.

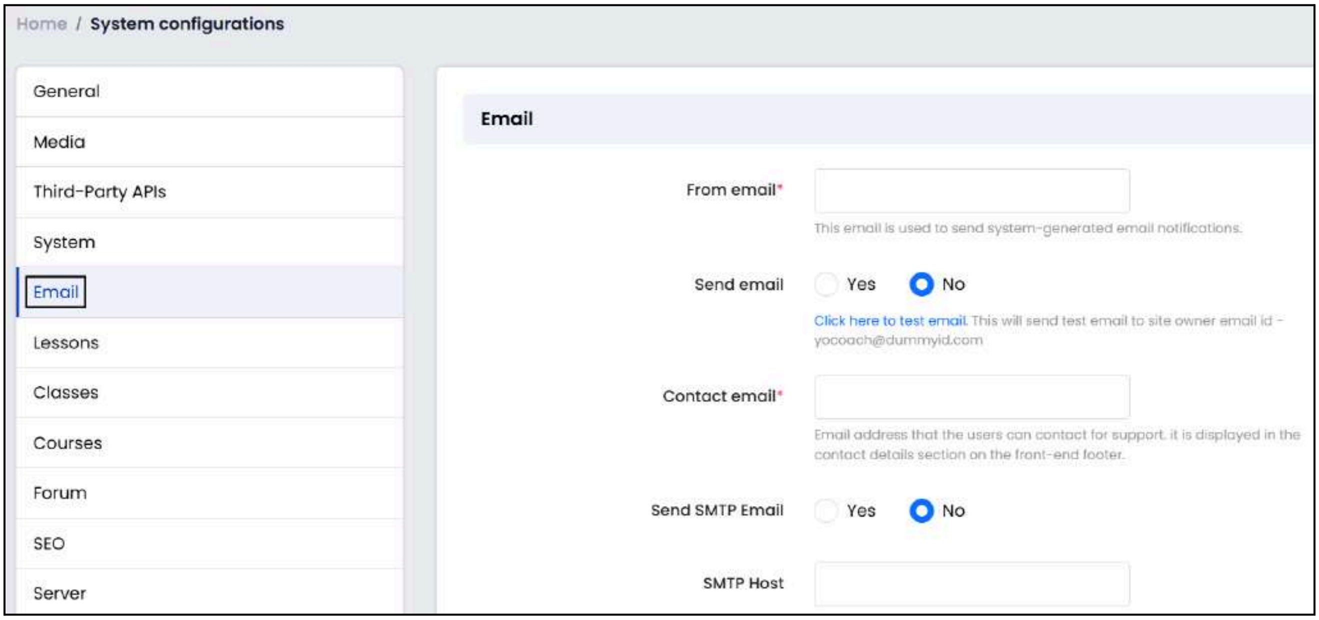
  The maximum file size for message attachments is 8 MB. Contact the FATbit team for support or custom limits.

Once all the mandatory fields and the required settings have been updated, click **Save changes.**

11.1.5 Email

Configure the email and SMTP settings to activate the system email feature, which sends email alerts to users (including you) when any platform-related action affects their account.

For example, when a client registers, the system sends a confirmation email to them and a notification email to you.



Points to note

The platform supports two methods to send these email alerts:

- **PHP (not recommended):** Uses your platform server's built-in mail function to send system emails, which requires server-side configuration at the code level and works only if your hosting provider supports PHP-based email sending.

  *To configure the PHP option, you ONLY need to update the fields above the '**Send SMTP email**' setting, and leave the rest of the SMTP-related fields blank.*

- **SMTP (highly recommended:** More reliable and easier to manage using third-party email services.

  To configure a third-party email service (SMTP), you need to activate the SMTP email feature and configure it, by updating all the fields under this form.

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With this clear, update the following:

- **From email*:** Enter the email address that will appear as the sender in all emails sent from the platform.

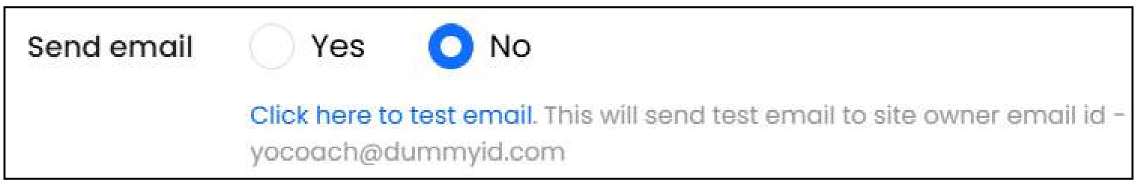
  If you are using SMTP, this email must match the email used to generate your SMTP credentials.

  If you are using PHP, this email must match the email configured in your PHP server code.

- **Send email:** Select ‘**Yes**’ to allow the platform to send system email notifications. Select ‘**No**’ to disable all email alerts (no system emails will be sent to users or you).

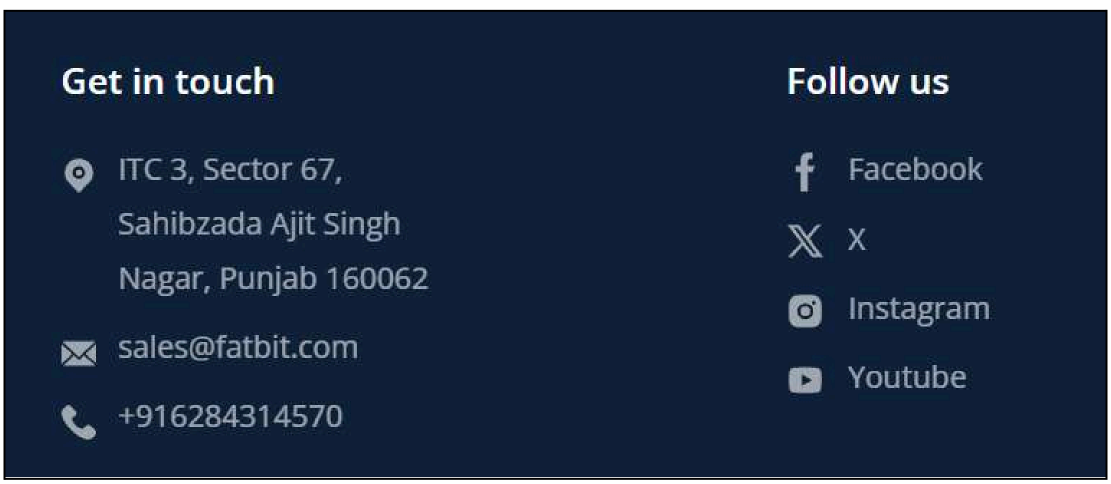
- **Click here to test email:** Select this link to test the email system.

  A test email will be sent to the site owner’s email address (defined under **Settings > System configurations >** General) to confirm that the setup is working.



- **Contact email*:** Enter the email address where user queries are sent when they use the **Contact Us** form.

  This email is also displayed in the **Support section** in the footer of the front end.



*If you are using PHP, you can stop here. Just complete the fields above and click **Save changes**. Leave the SMTP section blank.*

*However, to **use the SMTP server**, you need to update the next fields as well.*

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- **Send SMTP Email:** Select '**Yes**' to enable the SMTP feature.

  If activated:

  - All the emails will be sent through this SMTP set up, and not PHP (where the emails are sent directly from your web server).
  - Ensure that the data entered in the next field is right for the system to work.

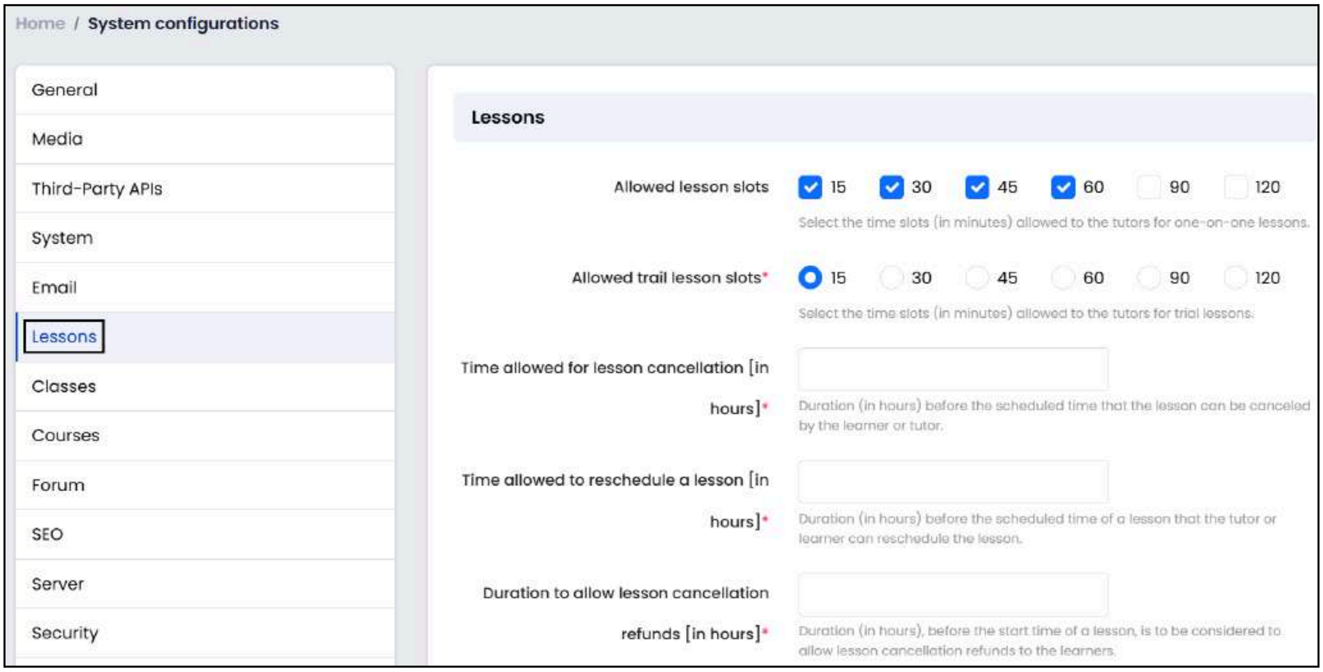
  Select '**No**' if you are using the PHP server. And leave the rest of the fields blank.

- **SMTP host:** Enter the SMTP server hostname provided by your email provider (for example: smtp.gmail.com).
- **SMTP port:** Enter the SMTP port number. Common options are 465 for SSL or 587 for TLS.
- **SMTP username:** Enter the email address used as your SMTP username. This is the email address for which you are adding the SMTP details.
- **SMTP password:** Enter the password for the SMTP email address above. This is the respective email address password.
- **SMTP secure protocol:** Select the encryption protocol required by your SMTP provider:
  - **TLS:** Transport Layer Security (TLS) is the successor protocol to SSL (an improved version). It works in the same way as the SSL, using encryption to protect the transfer of data and information.
  - **SSL:** SSL stands for Secure Sockets Layer. It's the standard technology for keeping an internet connection secure and safeguarding any sensitive data that is being sent between two systems.

Once done, click **Save changes**.

11.1.6 Lesson

Configure lesson settings that control how teachers schedule sessions, how learners cancel or reschedule, and how refunds are handled.



Update the following:

- **Allowed lesson slots:** Select the durations (in minutes) that teachers can choose for their one-on-one lessons.

  The selected durations appear as options on the teacher panel when adding or scheduling a lesson.

- **Allowed trial lesson slots:** Select the duration (in minutes) that is available for trial lessons.

  Teachers will only be able to offer a trial lesson for the selected duration.

- **Time allowed for lesson cancellation [in hours]*:** Enter the number of hours before a lesson starts when teachers and learners are allowed to cancel it.

  For example, if you enter 4, the lesson can be canceled up to 4 hours before its scheduled start time.

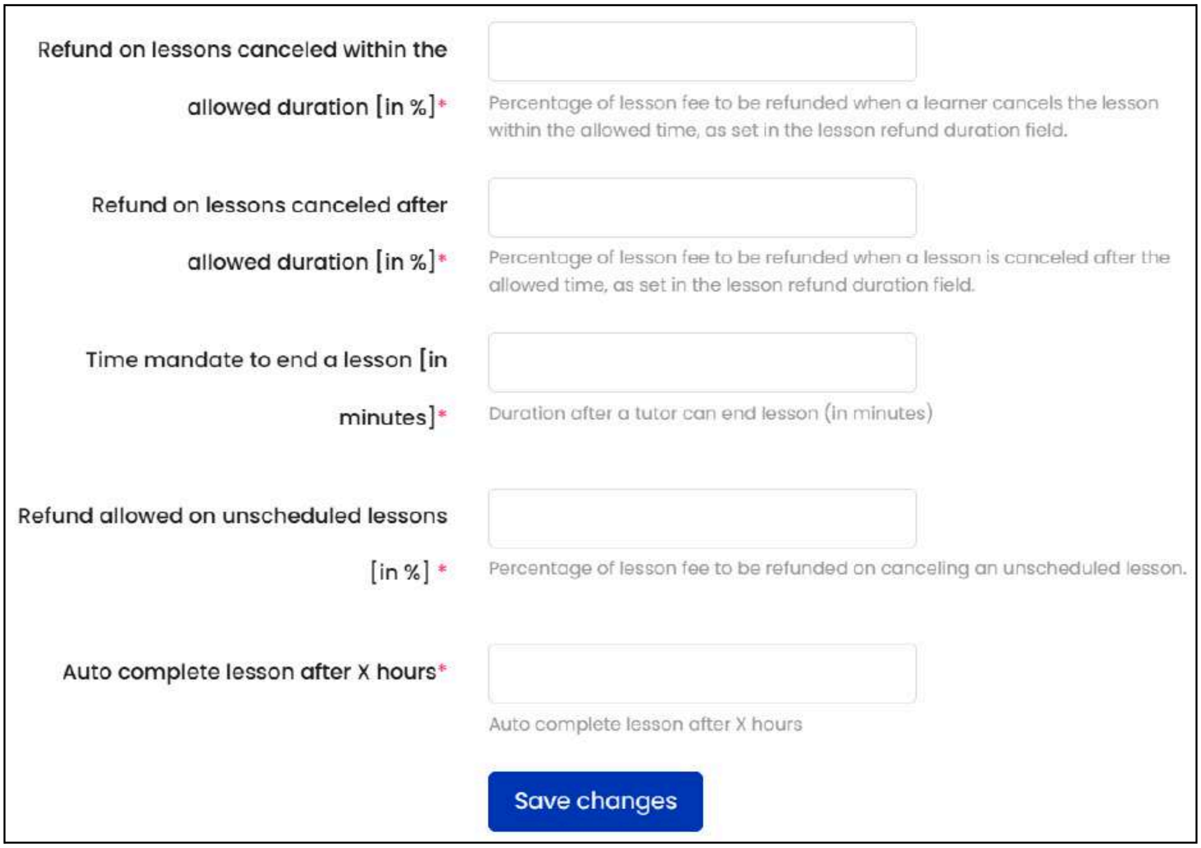
- **Time allowed to reschedule a lesson [in hours]*:** Enter the number of hours before the scheduled time when a teacher or learner can reschedule a lesson.

For example, if you enter 6, a lesson can be rescheduled up to 6 hours before it starts.

These next three refund-related fields work together to control how much learners are refunded based on when they cancel.

- **Duration to allow lesson cancellation refunds [in hours]*:** Enter the number of hours before a lesson starts when a learner is still eligible for a refund after canceling the lesson.

  For example, if you enter 2, the platform will process refunds only if the lesson is canceled at least 2 hours in advance.



- **Refund on lessons canceled within the allowed duration [in %]*:** Enter the percentage of the lesson fee to refund when a lesson is canceled within the allowed cancellation refund window.

  For example, if you enter 80, learners receive an 80% refund if they cancel before the defined time.

- **Refund on lessons canceled after allowed duration [in %]*:** Enter the percentage of the lesson fee to refund when a lesson is canceled after the allowed cancellation refund window has passed.

For example, if you enter 50, learners will receive only 50% of the session fee when cancellation is too late.

- **Time mandate to end a lesson [in minutes]*:** Enter the minimum number of minutes that must pass after a lesson starts and before a teacher is allowed to end it.

  For example, if you enter 10, teachers will not be able to end a lesson until at least 10 minutes have passed.

- **Refund allowed on unscheduled lessons [in %]*:** Enter the percentage of the lesson fee that should be refunded when a learner cancels an unscheduled lesson.

  For example, if you enter 100, the full amount will be refunded if the learner cancels before scheduling.

- **Auto complete lesson after X hours*:** Enter the number of hours after the scheduled end time when the platform should automatically mark a lesson as complete.

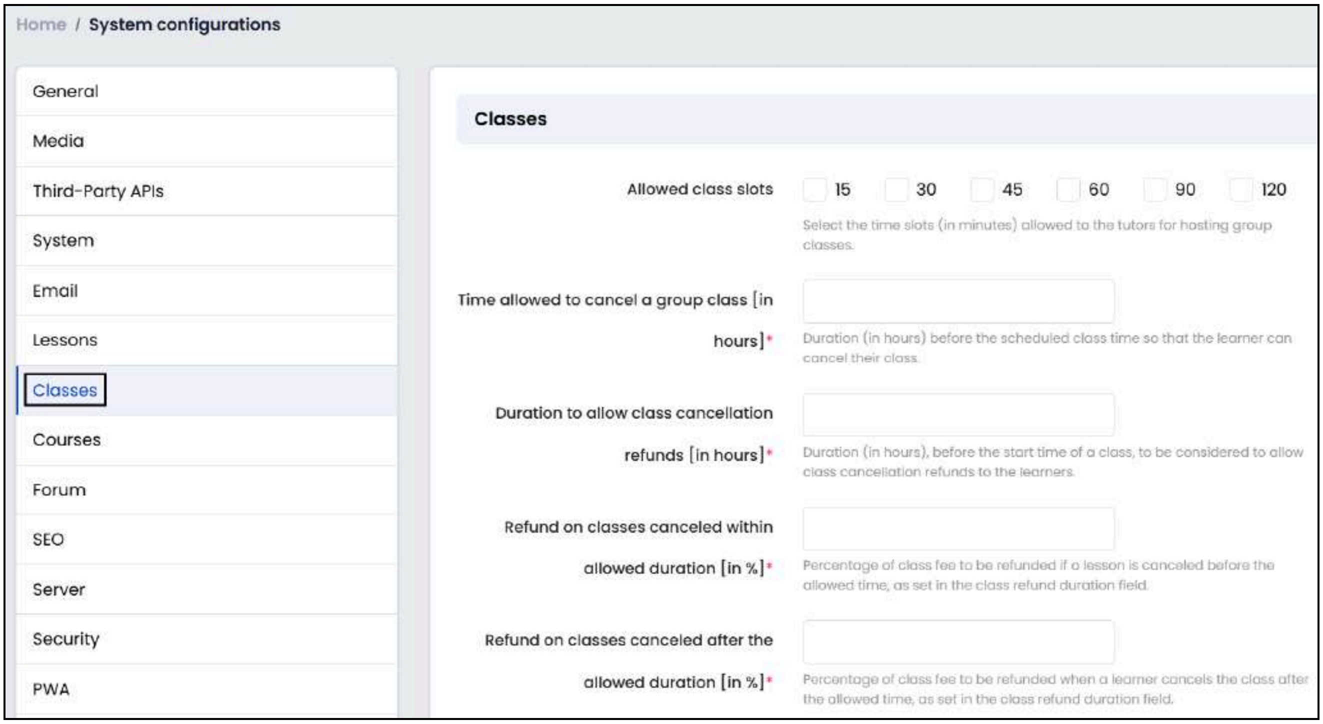
  For example, if you enter 3, the lesson will be auto-completed 3 hours after its scheduled start time, even if no further action is taken.

Once done, click **Save changes**.

11.1.7 Classes

Configure class settings that control group class durations, cancellation rules, refund policies, and learner limits.

These settings apply to all group sessions offered on the platform.



Update the following:

- **Allowed class slots*:** Select the time slots (in minutes) allowed for teachers to schedule group classes.

  The selected durations appear as options on the teacher panel when creating a class.

  For example, if you select 30 and 60, teachers will only be able to create group classes that are 30 or 60 minutes long.

- **Time allowed to cancel a group class [in hours]*:** Enter the number of hours before the scheduled start time that learners are allowed to cancel a group class.

  For example, if you enter 4, learners can cancel the class at least 4 hours before it begins.

- **Duration to allow class cancellation refunds [in hours]*:** Enter the number of hours before the scheduled class time that qualifies learners for a refund when they cancel.

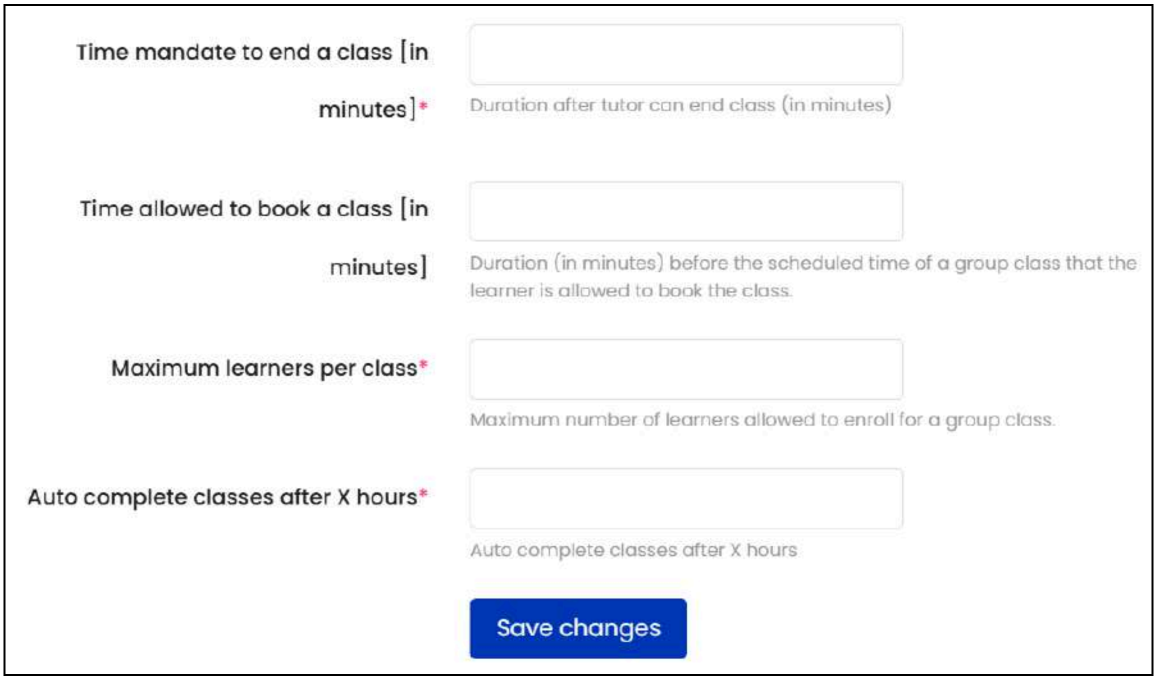
  For example, if you enter 2, learners must cancel at least 2 hours before the class starts to receive a refund.

- **Refund on classes canceled within allowed duration [in %]*:** Enter the percentage of the class fee that learners will receive as a refund if they cancel within the allowed refund duration.

  For example, if you enter 80, learners will be refunded 80% of the class fee.

- **Refund on classes canceled after the allowed duration [in %]*:** Enter the percentage of the class fee that learners will receive as a refund if they cancel after the allowed refund duration.

  For example, if you enter 50, learners will be refunded 50% of the class fee.



- **Time mandate to end a class [in minutes]*:** Enter the number of minutes that teachers must wait after a class starts before they are allowed to end it.

  For example, if you enter 10, teachers will only be able to end the class 10 minutes after it begins.

- **Time allowed to book a class [in minutes]:** Enter the number of minutes before the scheduled start time that learners must book the class.

For example, if you enter 30, learners will only be able to book the class at least 30 minutes before it begins

- **Maximum learners per class*:** Enter the maximum number of learners who can join a group class.

  For example, if you enter 20, no more than 20 learners will be allowed to enroll in the same class.

- **Auto complete classes after X hours*:** Enter the number of hours after the class ends when the system should automatically mark the class as completed.

  For example, if you enter 2, the class will be marked as completed 2 hours after the end time if the teacher does not complete it manually.

Once done, click **Save changes**.

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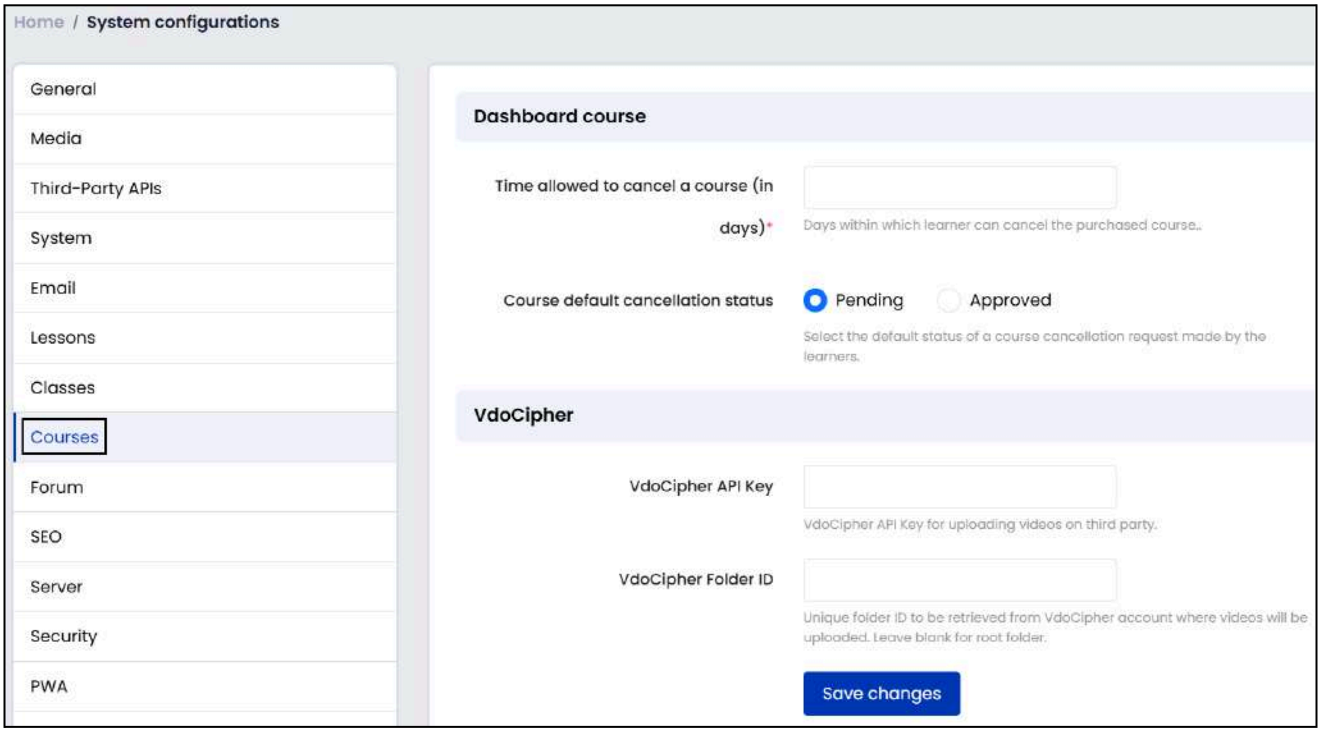
11.1.8 Courses

Configure how learners can cancel purchased courses and set up the third-party video platform (VdoCipher or MUX Videos) used to host course videos.



This form is divided into two to three sections (depending on the number of video hosting and streaming APIs integrated in the system):

i. Dashboard course

Update the following:

- **Time allowed to cancel a course (in days)*:** Enter the number of days after purchase during which a learner can cancel a course.

  For example, entering 5 means learners can cancel up to 5 days after purchase. To disable cancellations, enter 0.

  Once a cancellation is approved, learners receive a **100% refund** of the course fee.

- **Course default cancellation status:** Select the default status for all course cancellation requests:

- **Pending:** Select this to mark every request received as pending. You can then update the course status under **Courses** > [Course refund requests](#).
- **Approved:** Select this to approve cancellation requests automatically. The course is canceled immediately and the full fee is refunded. The status cannot be changed after approval.

If you want to update only these settings, click **Save changes.**

ii. VdoCipher

If you want to use this third-party API for the courses, generate the required API key and folder ID from the API's platform.

Then, use the keys to configure this API by updating the following fields:

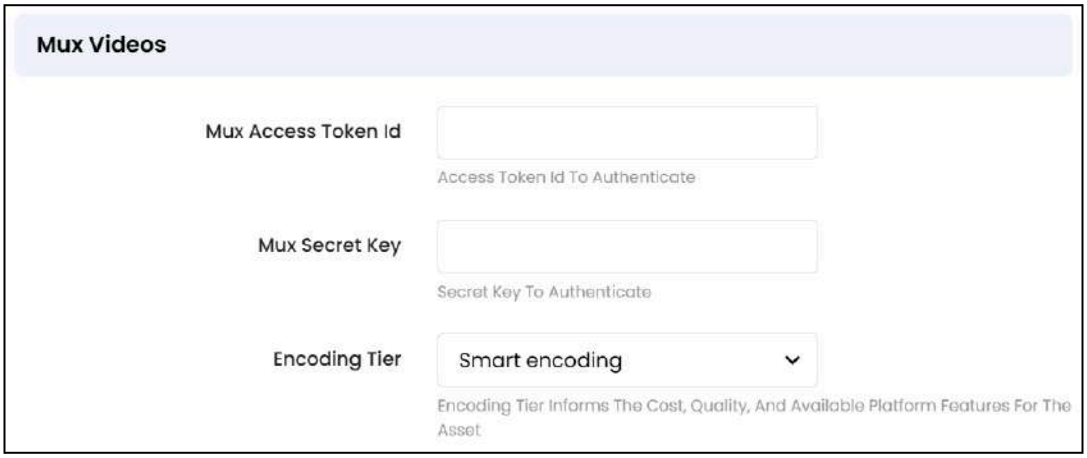
- **VdoCipher API Key:** Enter the API key from your VdoCipher account. This key allows the platform to upload and manage course videos.
- **VdoCipher Folder ID:** Enter the folder ID where videos should be stored. Leave this blank to upload videos to the root folder.

Once done, click **Save changes** to update it.

If you do not want to use VdoCipher, configure the Mux API instead. Only one video service can be active at a time, so ensure that only one is set up.

Depending on your initial setup, your system may include only one of these two APIs. If so, configure the one available in your platform accordingly.

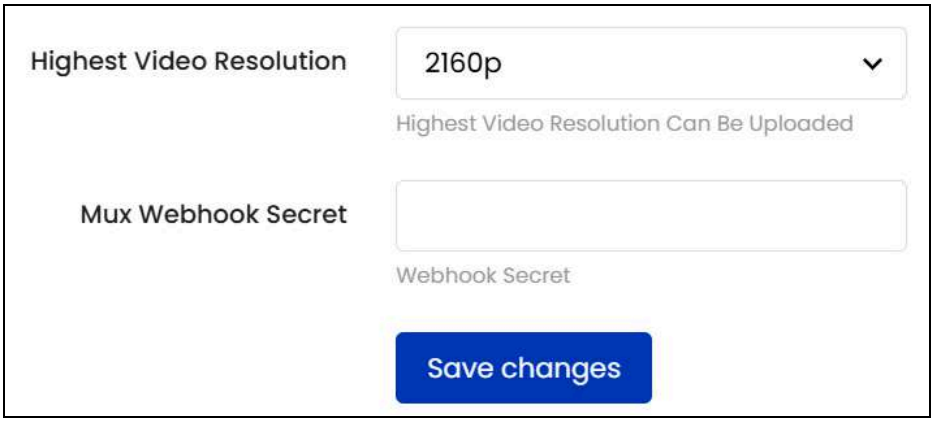
iii. MUX Videos



To integrate Mux for video hosting and streaming on the platform, generate the required API key and folder ID from its platform.

Then, fill the following fields using your Mux account credentials and preferences:

- **Mux access token ID:** Enter the access token ID from your Mux account. This value is required to authenticate API requests between the platform and Mux.
- **Mux secret key:** Enter the secret key associated with the access token ID. This ensures secure access when uploading and managing videos.
- **Encoding tier:** Select the video encoding tier to control cost, quality, and available features:
    - **Smart encoding:** Select this to allow Mux to automatically optimize encoding based on the video content. Recommended for general use.
    - **Standard encoding:** Select this to apply default encoding settings that balance quality and cost.
    - **High-quality encoding:** Select this to ensure the best visual quality, especially for HD and 4K content. This option may increase processing costs.

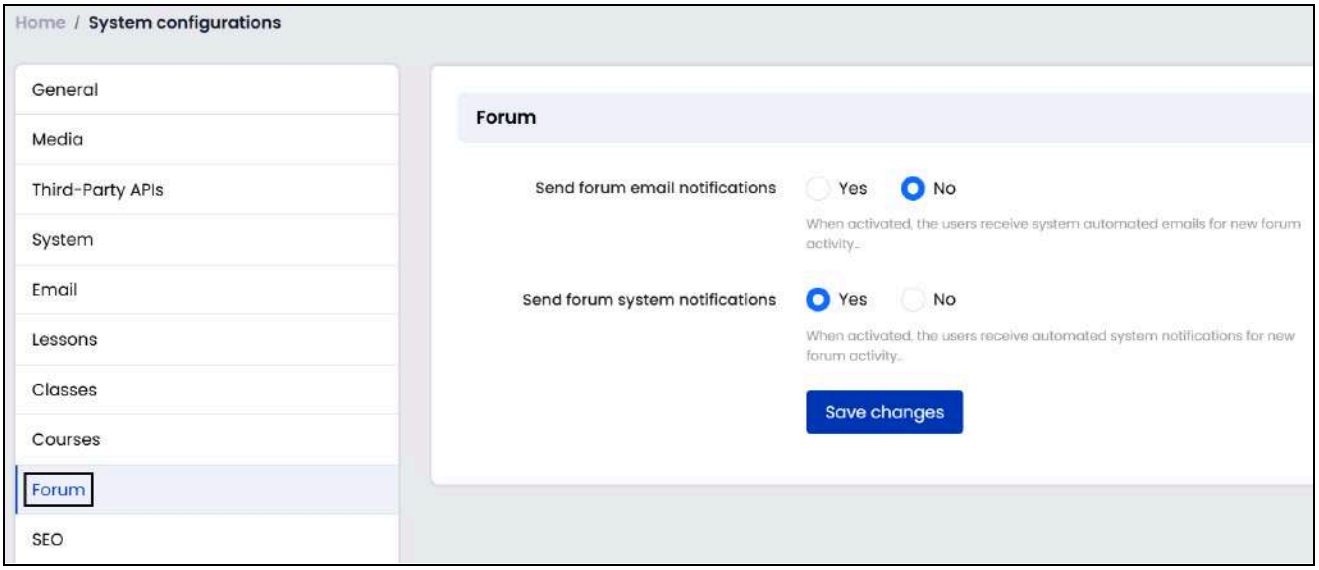


- **Highest video resolution:** Select the maximum resolution that users are allowed to upload from the options 720p, 1080p, 1440p, and 2160p.
- **Mux webhook secret:** Enter the webhook secret provided by Mux. This value secures communication between the platform and Mux for event notifications (e.g., upload completed, encoding finished).

Once done, click **Save changes** to update it.

11.1.9 Forum

Configure the settings to manage forum notifications and activities, determining whether users receive email or system notifications about actions in the discussion forums.



Update the following:

- **Send forum email notifications:** Select '**Yes**' to allow the system to automatically send email notifications when certain actions occur in discussion forums, keeping users updated on activities like new comments, new questions posted in subscribed tags, or reported content.

  Select '**No**' to prevent the system from sending email notifications about forum activity.

- **Send forum system notifications:** Select '**Yes**' to allow the system to automatically send notifications to users' platform accounts when certain actions occur in discussion forums, keeping users informed about updates such as status changes for requested tags, new comments on questions, or changes to reported requests.

  Select '**No**' to prevent the system from sending system notifications about forum activity.

Once done, click **Save changes**.

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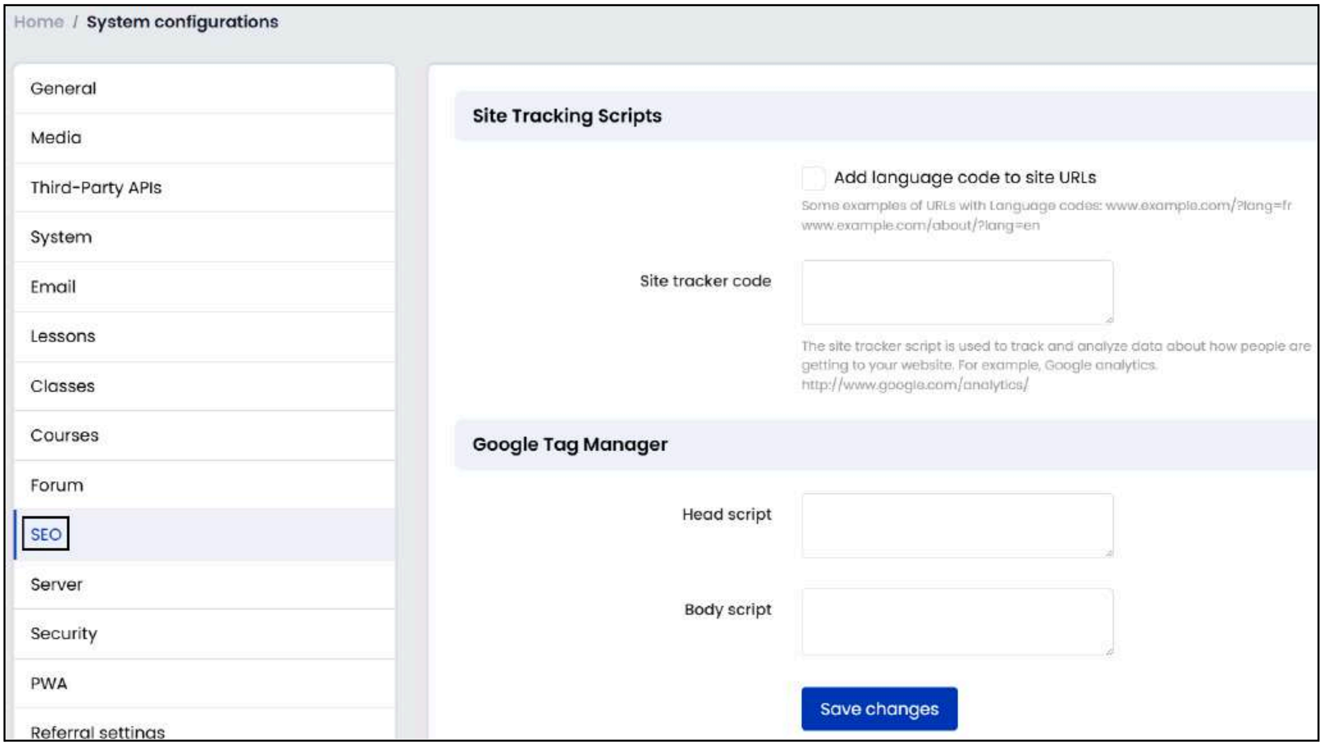
11.1.10 SEO

Set up the site tracker, and Google tag manager on the platform.



This form is divided into two sections:

i. Site tracking scripts

Update the following:

- **Add language code to site URLs:** Check mark this to allow updating the website's URLs in different languages.

  Once activated, you can edit the URLs for each language option under **SEO** > URL rewriting. The URL rewriting form will display a separate field for each language's URL. The number of fields will depend on how many languages are available on the website.

  If you do not select this checkbox, the URL rewriting form will display only one custom URL field for all languages. Refer to URL rewriting to learn more.

  If you do not add a custom secondary-language URL under URL Rewriting after activation, the default language URL will automatically include a language

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segment for the secondary language. For example, the URL in the default language will be www.demo.yo-coach.com/, and the URL in Spanish will be www.demo.yo-coach.com/es/.

- **Site tracker code:** Copy-paste the site tracker code from the file obtained from the Google Analytics platform in this field.

  This is required to analyze the flow and activities of visitors at the front end of the website.

If you want to update only these settings, click **Save changes**.

ii. Google Tag Manager

Google Tag Manager is a tag management system (TMS) that enables you to efficiently update measurement codes and related code fragments, known as tags, on your website. It integrates with Google Analytics to transfer data, which is then used to track traffic and measure user engagement on the website.

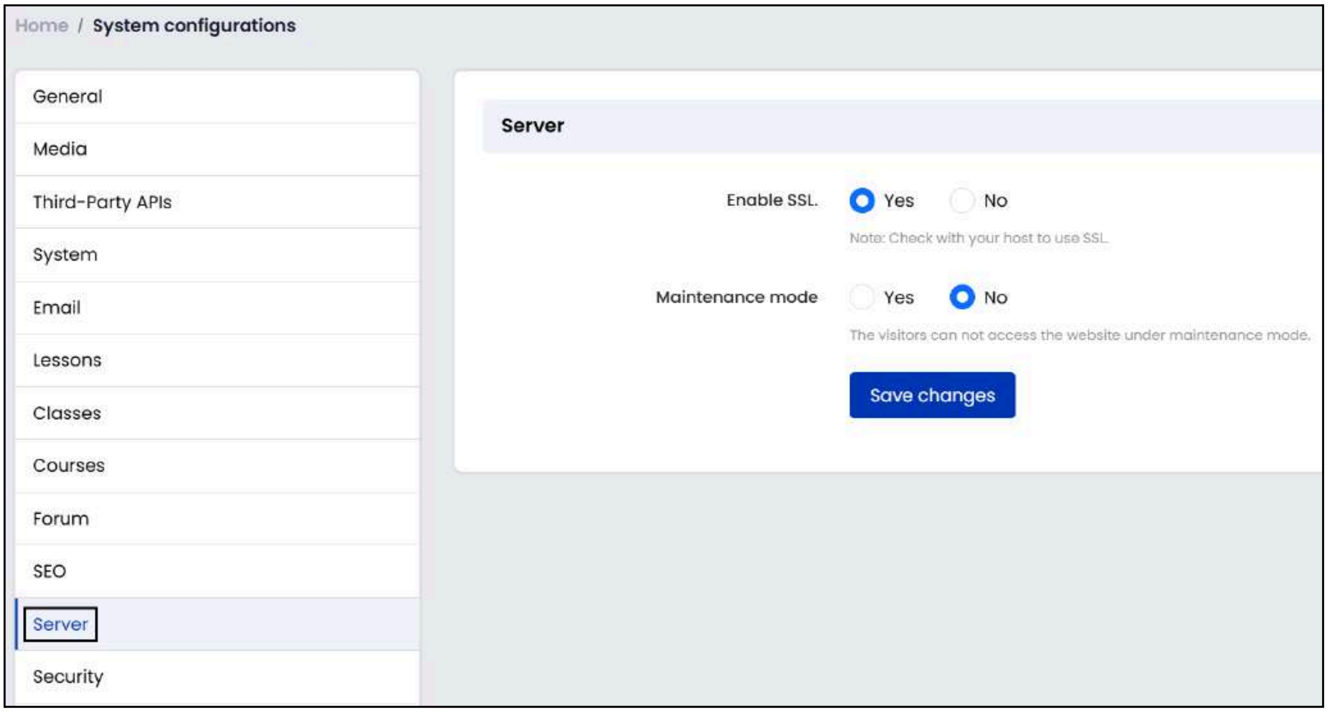
Generate the Google Tag Manager code from the Google Cloud Console platform. Once you have the code, update the following fields to configure Google Tag Manager on the platform:

- **Head script:** Enter the Head script by copying and pasting it from the Google Tag Manager platform.
- **Body script:** Enter the Body script by copying and pasting it from the Google Tag Manager platform.

Once done, click **Save changes.**

11.1.11 Server

Configure the SSL settings and maintenance mode settings to secure your website and control its availability.



Update the following:

- **Enable SSL:** Select 'Yes' to enable SSL (Secure Sockets Layer) for the platform.

  SSL is a protocol that secures the connection between your website and its visitors by encrypting the data transmitted.

  Before selecting 'Yes,' contact your hosting provider to confirm that an SSL certificate has been installed on your server.

  This setting will work only if a valid SSL certificate is already in place.

  Select '**No**' if an SSL certificate is not yet installed or you do not want to enable SSL at this time.

- **Maintenance mode:** Select 'Yes' to activate maintenance mode when the website is being updated, fixed, or temporarily taken offline.

  When activated, users will see a temporary page informing them that the website is under maintenance.

*The contents of the temporary maintenance page can be managed from **CMS > [Language labels](#)**.*

Select '**No**' to deactivate maintenance mode and return the website to live status.

Once done, click **Save changes**.

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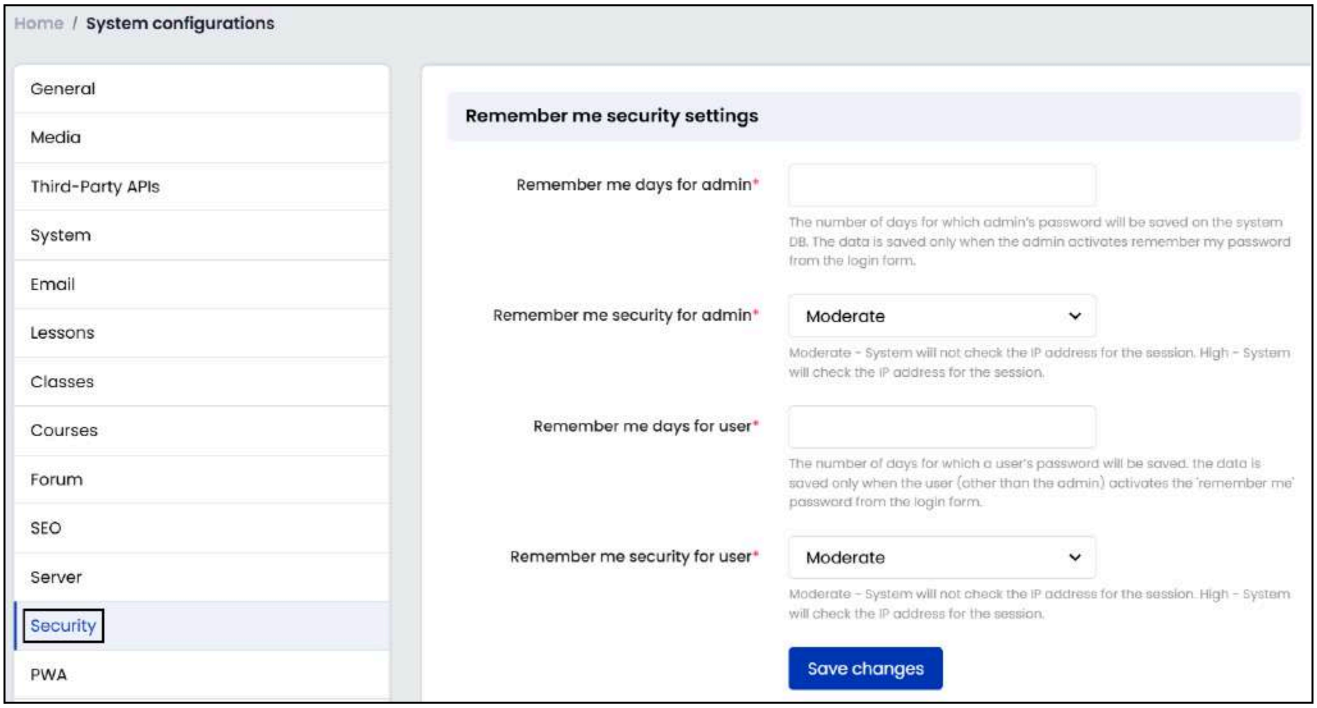
11.1.12 Security

Set up the Remember me security settings to control how long login sessions are remembered for both administrators and users, and to define the level of security applied during the remembered sessions.



Points to note

- The "**Remember me**" function is only activated if users or admins select the "**Remember me**" checkbox during login.
- Changing these settings will affect future sessions after saving; existing sessions are not impacted.

Update the following:

- **Remember me days for admin*:** Enter the number of days to remember the admin login session after selecting the "**Remember me**" option at login.

  For example: Enter 7 to keep the admin logged in for 7 days without needing to re-enter the password.

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- **Remember me security for admin*:** Select the security level to apply during an admin's remembered session:
    - **Moderate:** Select this if you do not want the system to verify the IP address for the session, allowing more flexibility in admin login from different networks.
    - **High:** Select this if you want the system to verify the IP address for the session, providing stronger security by requiring the same IP address throughout the session.
- **Remember me days for user*:** Enter the number of days to remember a user's login session after selecting the "**Remember me**" option at login.

    The system saves the user's password for the specified number of days, allowing seamless access without repeated login prompts.

    For example: Enter 14 to keep users logged in for 14 days without re-entering passwords.
- **Remember me security for user*:** Select the security level to apply during a user's remembered session.
    - **Moderate:** Select this if you do not want the system to verify the IP address during the session, making it easier for users who access the site from different networks or devices.
    - **High:** Select this if you want the system to verify the IP address for the session, improving security by ensuring users remain on the same network.

Once done, click **Save changes**.

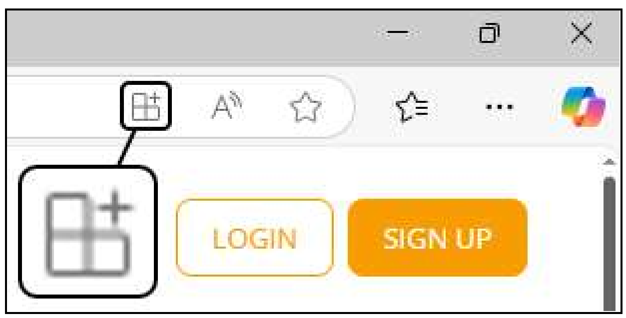
11.1.13 PWA

Yo!Coach allows you to configure a **Progressive Web App (PWA)** version of your platform.

A PWA behaves like a mobile app but runs in a browser and can be installed on a device without visiting an app store. Users can install the PWA in the following ways:

- **Desktop users:** A button appears in the browser's address bar. The label of the button varies for each browser:
    - **Chrome:** Install

    - **Microsoft Edge:** App available



    - **Safari:** Does **not support PWA** installation via the address bar
    - **Firefox:** Does **not support PWA** installation via the address bar

Click the applicable button, and a pop-up will appear confirming your action to install the PWA.

Confirm the prompt, and the app will be installed accordingly.

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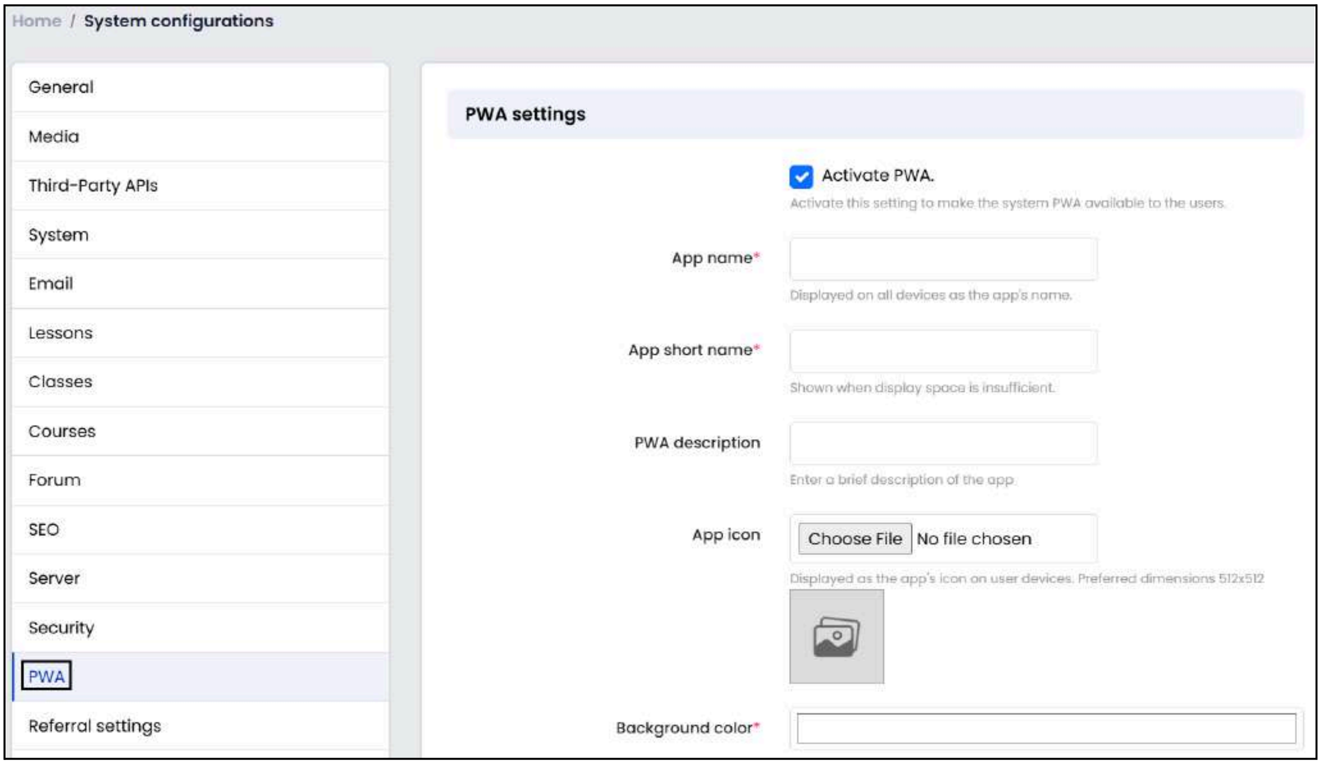
- **Mobile users:** Tap **Add to home screen** from the browser menu (available in Chrome, Safari, and supported Android browsers), follow the instructions, and the app will be installed accordingly.

Set up the **PWA settings** of the platform including your app's basic appearance and behavior via this form.



Update the following:

- **Activate PWA:** Check mark this to activate the PWA functionality for your system. Once activated, the app will be available to users as a Progressive Web App.
- **App name*:** Enter the full name of your app as you want it displayed on all devices.
- **App short name*:** Enter a shorter version of the app name. This name will be shown when there is limited space, such as under the mobile app launcher icon.
- **PWA description:** Enter a brief summary of your app that describes its purpose or main features. This description helps users understand what the app does.
- **App icon:** Click **Choose File** and select an image from your system that will be used as the app's icon.

  This icon appears on users' devices as the app launcher icon and on the splash screen—the first screen shown when the app starts.

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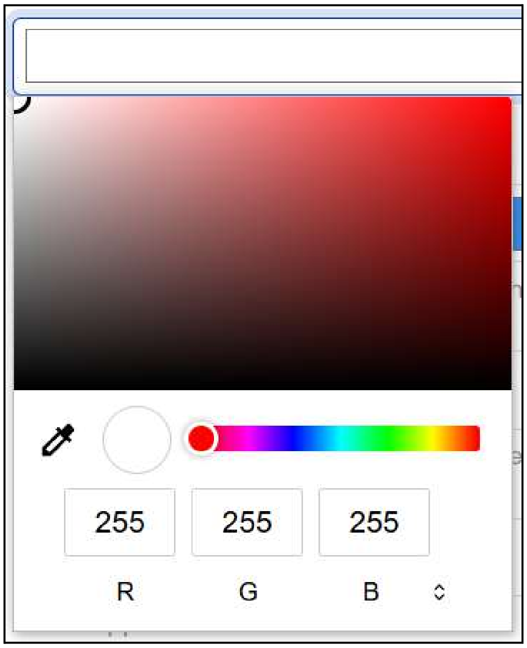
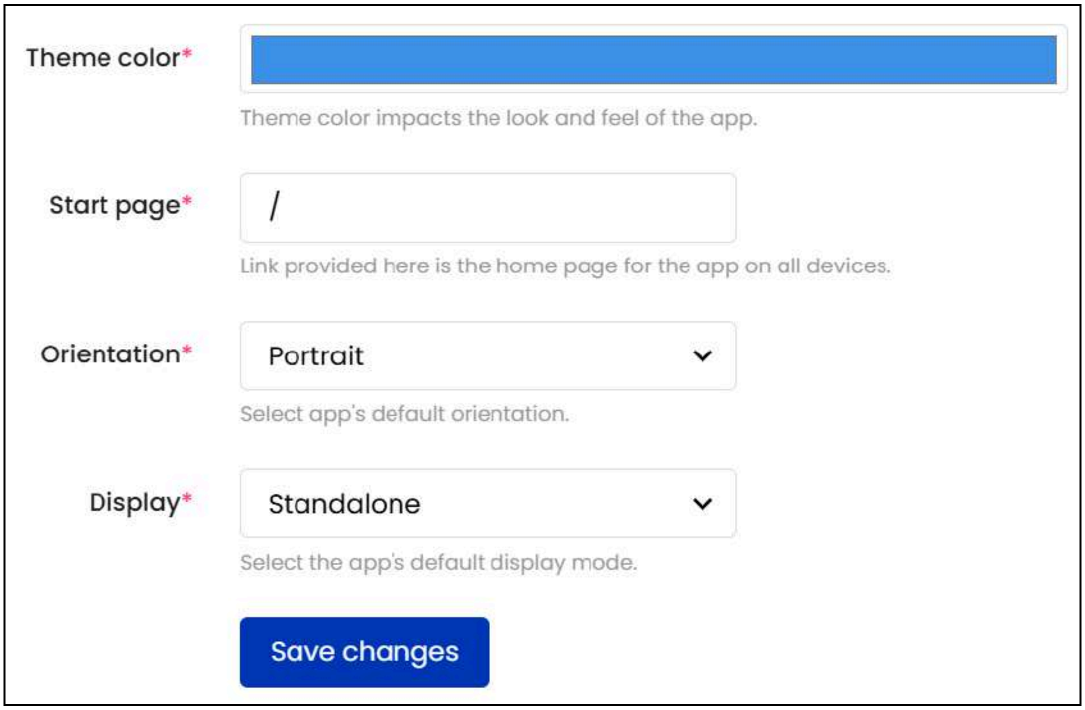
- **Background color*:** Select the background color that appears behind your app's splash screen. This color is also used on devices that support background customization for splash screens.

  To select a color, click the color field. A color palette will appear.



  You can choose a color by selecting the color from the palette or entering the color code in the fields below the palette.



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- **Theme color*:** Select the main theme color for your app.

  This color affects the browser's UI elements, such as the status bar, when the app is launched.

  Use the same process as shared above (background color field) to set the color in this field.

- **Start page*:** Enter the URL path of the page that should open when the app is launched.

  For example: / for the homepage or */dashboard* for a specific landing page.

- **Orientation*:** Click this field to select the default screen orientation for your app from the following options.

  A dropdown list appears with two options:

  - **Portrait:** Select this option if your app is designed to be viewed vertically (taller than it is wide), such as most mobile screens.
  - **Landscape:** Select this option if your app is intended to be used horizontally (wider than it is tall), such as for presentations or video content.

  Choose the option that best suits the design and layout of your app.

- **Display*:** Click this field to select how your app should appear when launched on a user's device.

  A dropdown list appears with the following options:

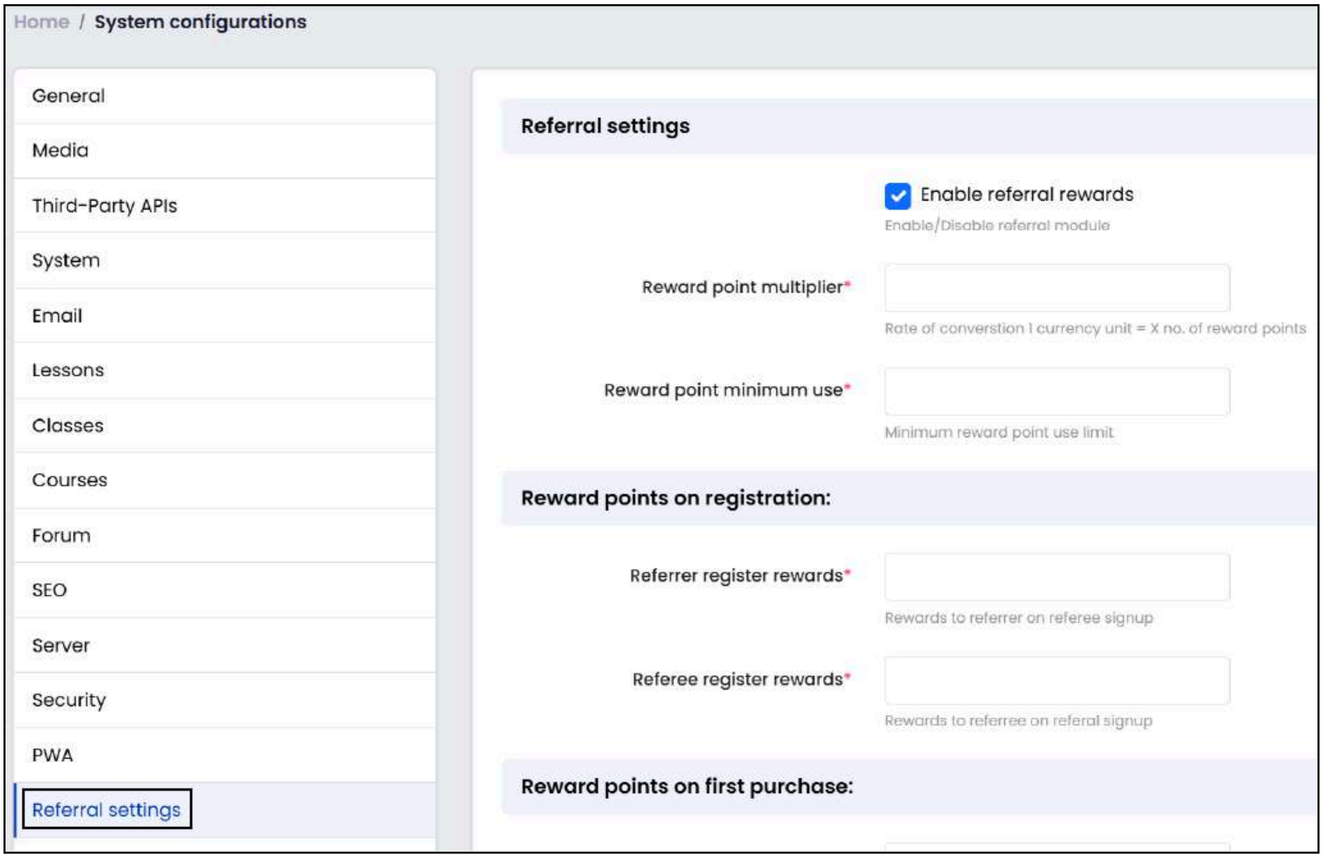
  - **Standalone:** Select this option if you want your app to open like a native mobile app, without showing the browser's address bar or standard UI elements.
  - **Fullscreen:** Select this option to launch the app using the entire screen space, hiding all browser UI, including system navigation.
  - **Minimal UI:** Select this option to show only minimal browser controls, such as back and reload buttons, while still giving the app an app-like feel.
  - **Browser:** Select this option if you want the app to open like a standard website within the browser, with full browser interface visible.

Once done, click **Save changes**.

11.1.14 Referral settings

Configure or set up referral rewards to let users earn reward points by referring others to the platform.

These points can be redeemed for purchases after meeting the required criteria. You can customize how points are earned for different actions, such as registration and first purchases.



This form is divided into three sections:

i. Referral settings

Update the following:

- **Enable referral rewards:** Check mark this to activate the referral rewards feature.

  When activated, users can earn points for successful referrals and actions completed by those referrals.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

- **Reward point multiplier*:** Enter the number of reward points that equal one unit of your platform's currency.

  For example: If set to 10, users need 10 reward points to redeem 1 currency unit (e.g., 10 points = $1).

- **Reward point minimum use*:** Enter the minimum number of reward points a user must collect before they can use them during checkout.

  For example: If set to 10, users must have at least 10 points to apply them toward a purchase.

ii. Reward points on registration

Set the reward values users receive when a referral registers on the platform:

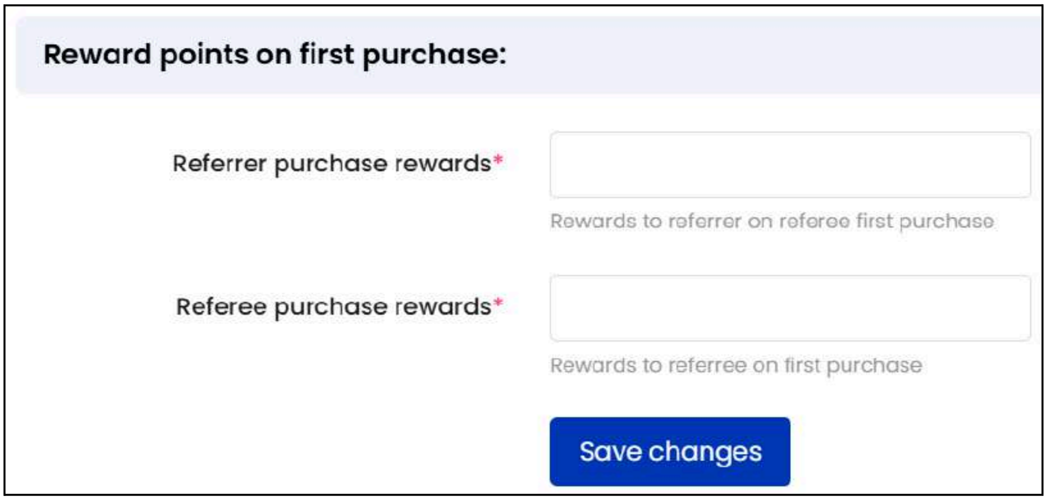
- **Referrer register rewards*:** Enter the number of reward points the referrer earns when someone signs up using their referral link.

  For example: If set to 50, the referring user earns 50 points per successful registration.

- **Referee register rewards*:** Enter the number of reward points the new user (referee) receives when they register using a referral link.

  For example: If set to 100, the new user earns 100 points upon signup.

iii. Reward points on first purchase



DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

Set the reward values for actions related to a referee's first purchase on the platform:

- **Referrer purchase rewards*:** Enter the number of reward points the referrer earns when the referred user places their first order.

  For example: If set to 30, the referrer receives 30 points after the referee completes their first purchase.

- **Referee purchase rewards*:** Enter the number of reward points the referred user earns when they complete their first purchase.

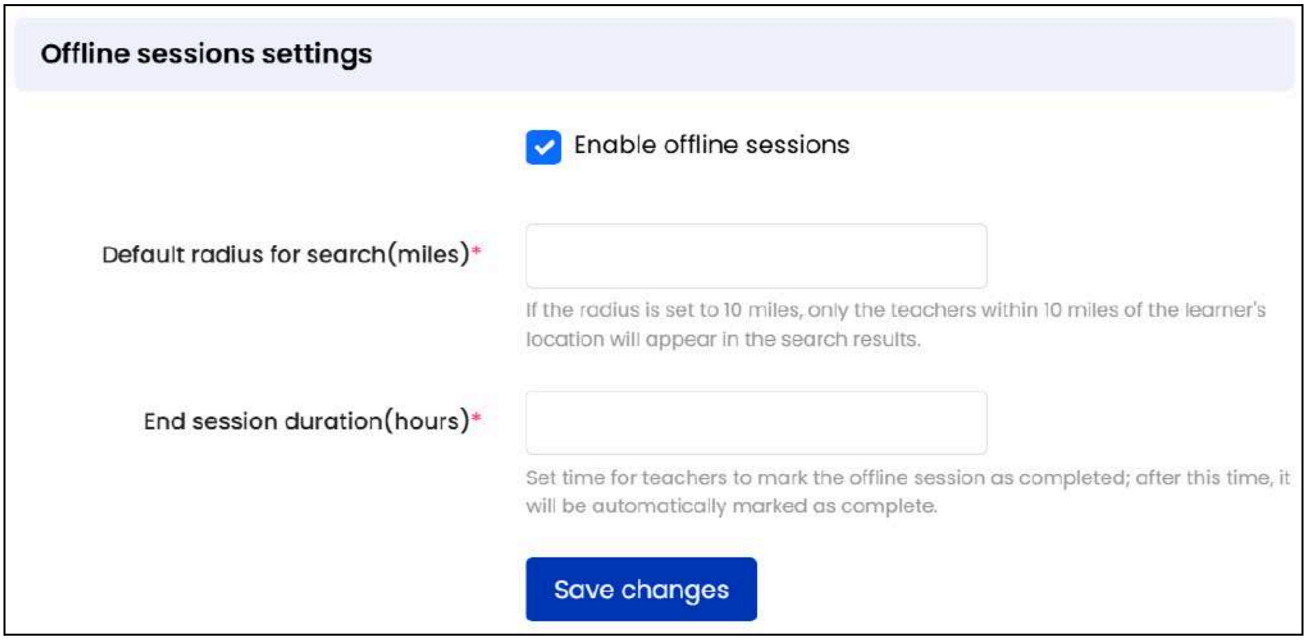
  For example: If set to 50, the referee receives 50 points after making their first transaction.

Once all the mandatory fields and the required settings have been updated, click **Save changes.**

11.1.15 Offline sessions

Set up or configure the offline session feature on the platform, to allow teachers to offer in-person learning sessions alongside online options.

When offline sessions are activated, learners can search for nearby teachers based on their physical location, and offline sessions will be automatically marked as complete if not updated within a set time.



Update the following:

- **Enable offline sessions:** Check mark this to allow teachers to conduct offline sessions. When enabled, learners will see teachers available for in-person sessions based on the set search radius.
- **Default radius for search (miles)*:** Enter the number of miles to define the search radius for offline sessions.

  This setting determines how far the system should look for available teachers around a learner's location.

  For example: If you enter 10, only teachers within a 10-mile radius from the learner will appear in search results.

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- **End session duration(hours)*:** Enter the number of hours after which an offline session should be automatically marked as complete if the teacher has not done so manually.

  This setting helps ensure that sessions do not remain open indefinitely in the system.

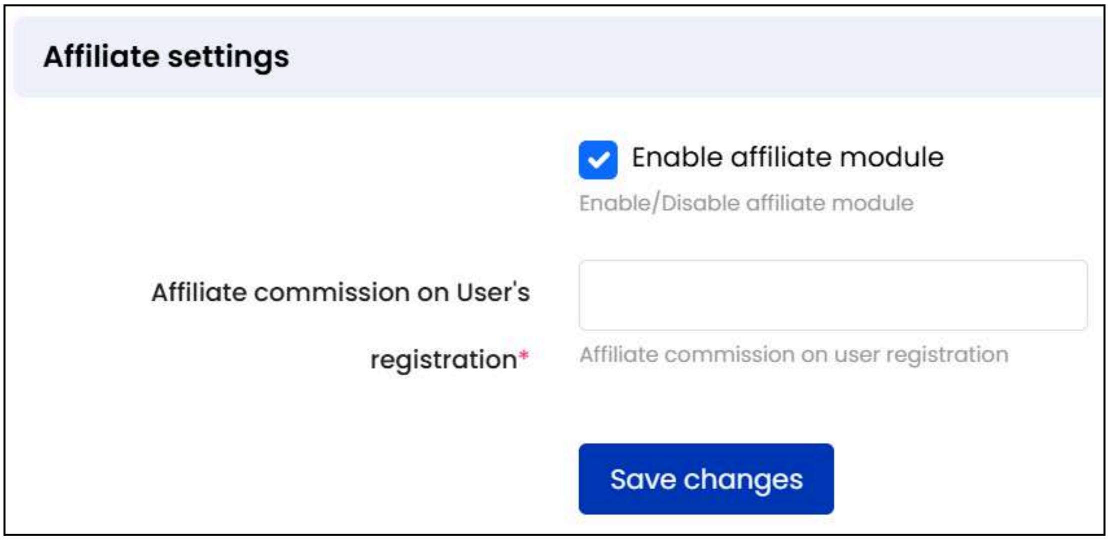
  For example: If you enter 2, the session will be marked as complete 2 hours after its scheduled end time unless the teacher completes it earlier.

Once done, click **Save changes**.

11.1.16 Affiliate settings

Set up or configure affiliate options to allow users to earn rewards for referring new users to the platform.

When the affiliate module is enabled, users can join as affiliates and receive a commission for successful referrals based on user registrations.



Update the following:

- **Enable affiliate module:** Check mark this to activate the affiliate module.

  When activated, users can sign up as affiliates and generate referral links to invite others to join the platform.

  Affiliates receive a commission each time a new user registers through their referral link.

- **Affiliate commission on user registration*:** Enter the amount of commission an affiliate will earn when a new user registers using their referral link.

  This value defines how much the platform pays affiliates for each successful user registration they generate.

  For example: If you enter 5, the affiliate will receive 5 currency units (for example, $5) for every user who signs up through their referral.

Once done, click **Save changes**.

<u>**DISCLAIMER:**</u> The color theme and labels may differ in the screenshots compared to those on the platform.
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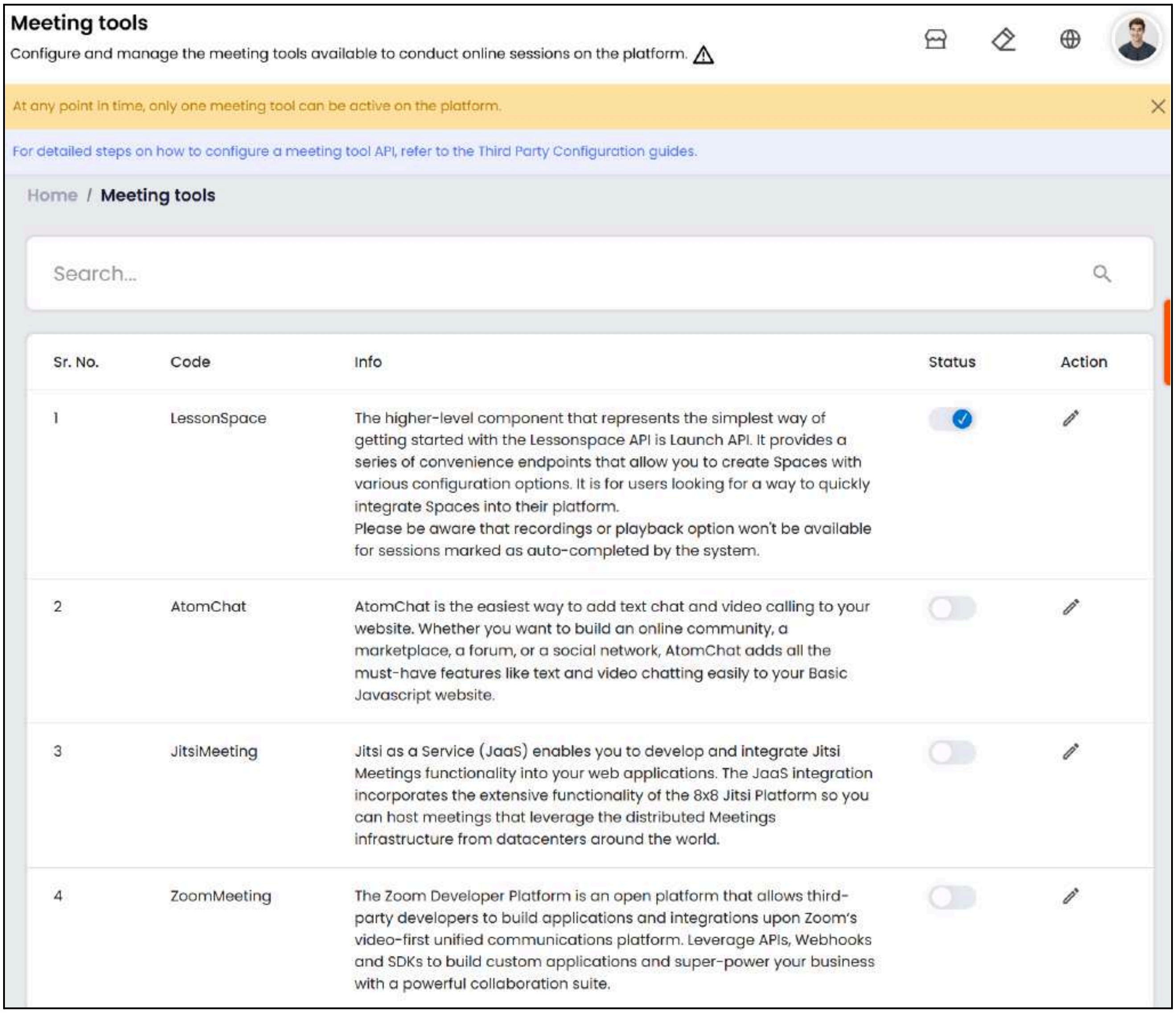
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

11.2 Meeting tools

Configure and manage third-party meeting tools to conduct live online sessions on the platform.

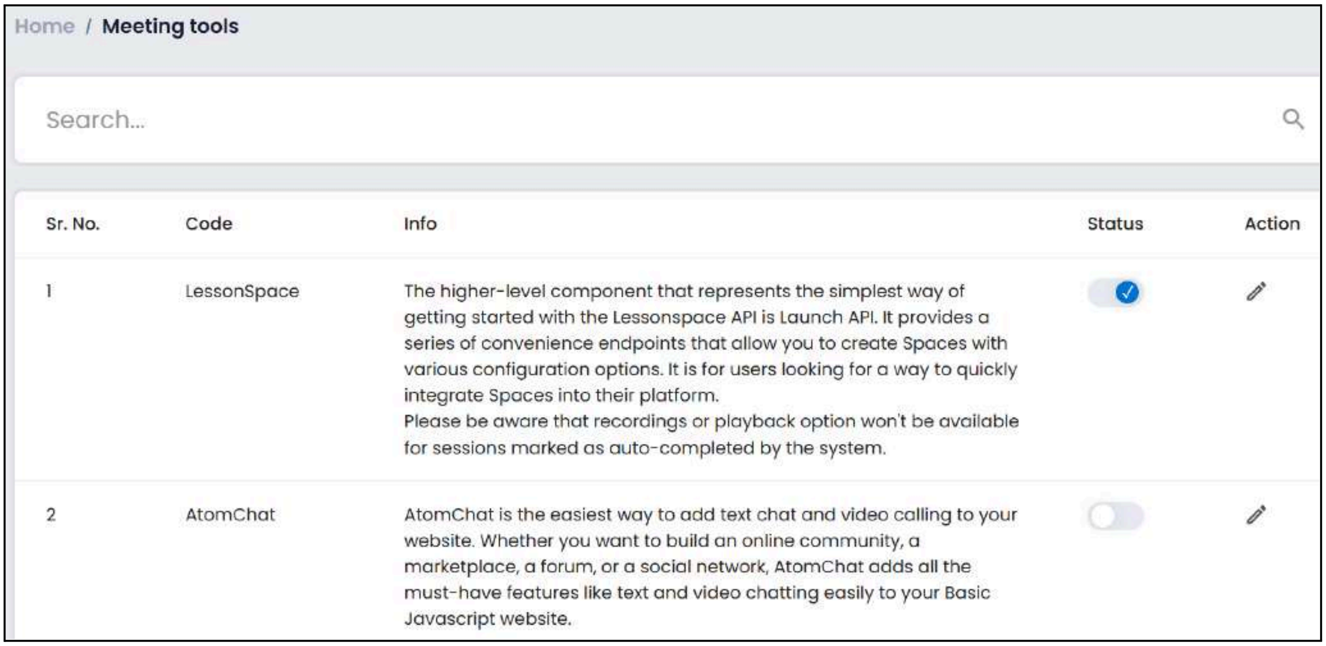
This section allows you to view available meeting tools, activate one for use, and set up tool-specific configuration settings.



The following tools are supported by default: LessonSpace, AtomChat, JitsiMeeting, and ZoomMeeting.

You cannot add or delete meeting tools from the system. To get another meeting tool integrated into the platform, kindly contact the FATbit support team.

Manage the meeting tools list



Each entry in the list includes the following details and provides options for management including:

- **Sr. no:** Serial number.
- **Code:** The name of the meeting tool.
- **Info:** The information about the meeting tool.
- **Status:** Edit the status (activate or deactivate) of the meeting tool as per your requirements using the toggle switch beside it, under the status column.

  Turn **on**  the toggle switch beside the meeting tool to activate it.

  Leave this **off** or turn it **off** to deactivate the meeting tool.

  A warning dialog box will appear for both actions, asking if you want to update the status or not.

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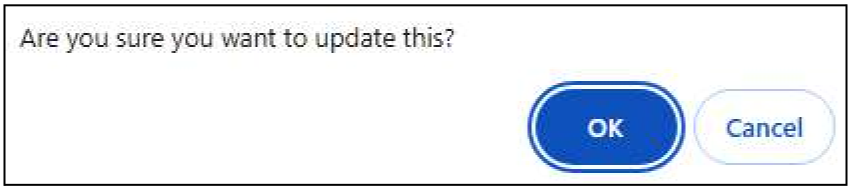
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.



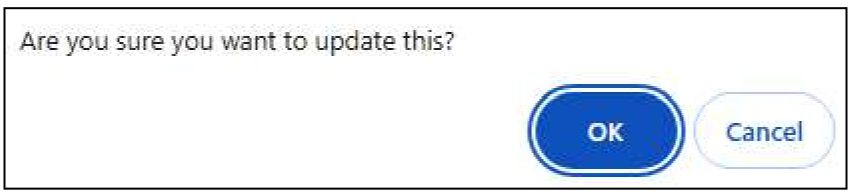
Click **Ok** to delete it or **Cancel** to abort the action.

Only one meeting tool can be active on the platform at a time.

- ➔ *You cannot deactivate the currently active tool unless another tool is selected to replace it.*
- ➔ *If you activate a different tool while one is already active, the new tool will be activated automatically, and the previously active one will be deactivated.*

To use a meeting tool, you must also configure it by entering the required API keys using the [Edit button](#) next to it. The tool will not function unless it is both active and properly configured.

A warning dialog box will appear for both actions, asking if you want to update the status or not.



Click **Ok** to delete it or **Cancel** to abort the action.

Action button

There is a single action button next to each entry—**Edit** . This button allows you to configure the meeting tool. Click this and the **Meeting tool setup** form will appear.

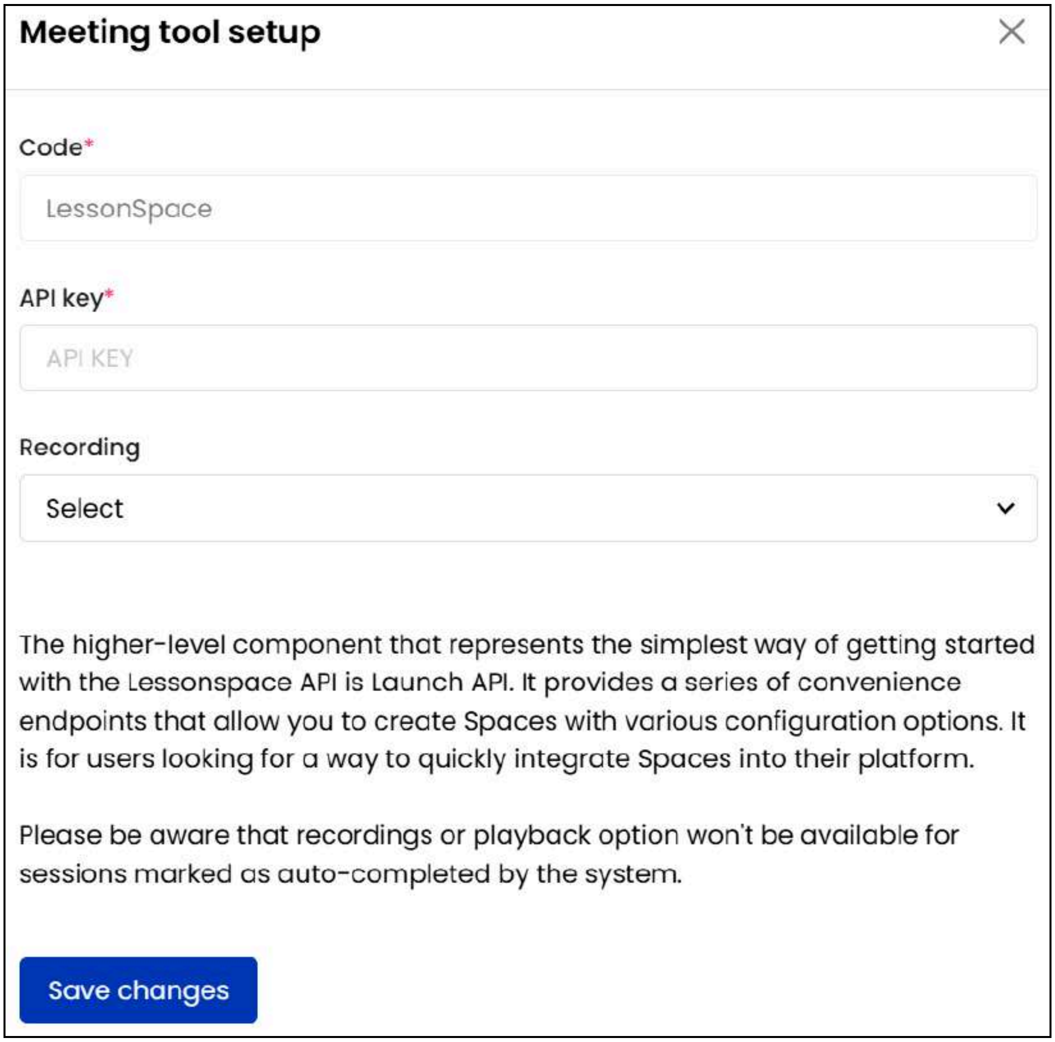
Each meeting tool uses a different API and requires its own configuration fields.

By default, four meeting tools are available in the system. If needed, additional meeting tools can be added based on your requirements.

The configuration details for each default meeting tool are provided below:

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

i. LessonSpace

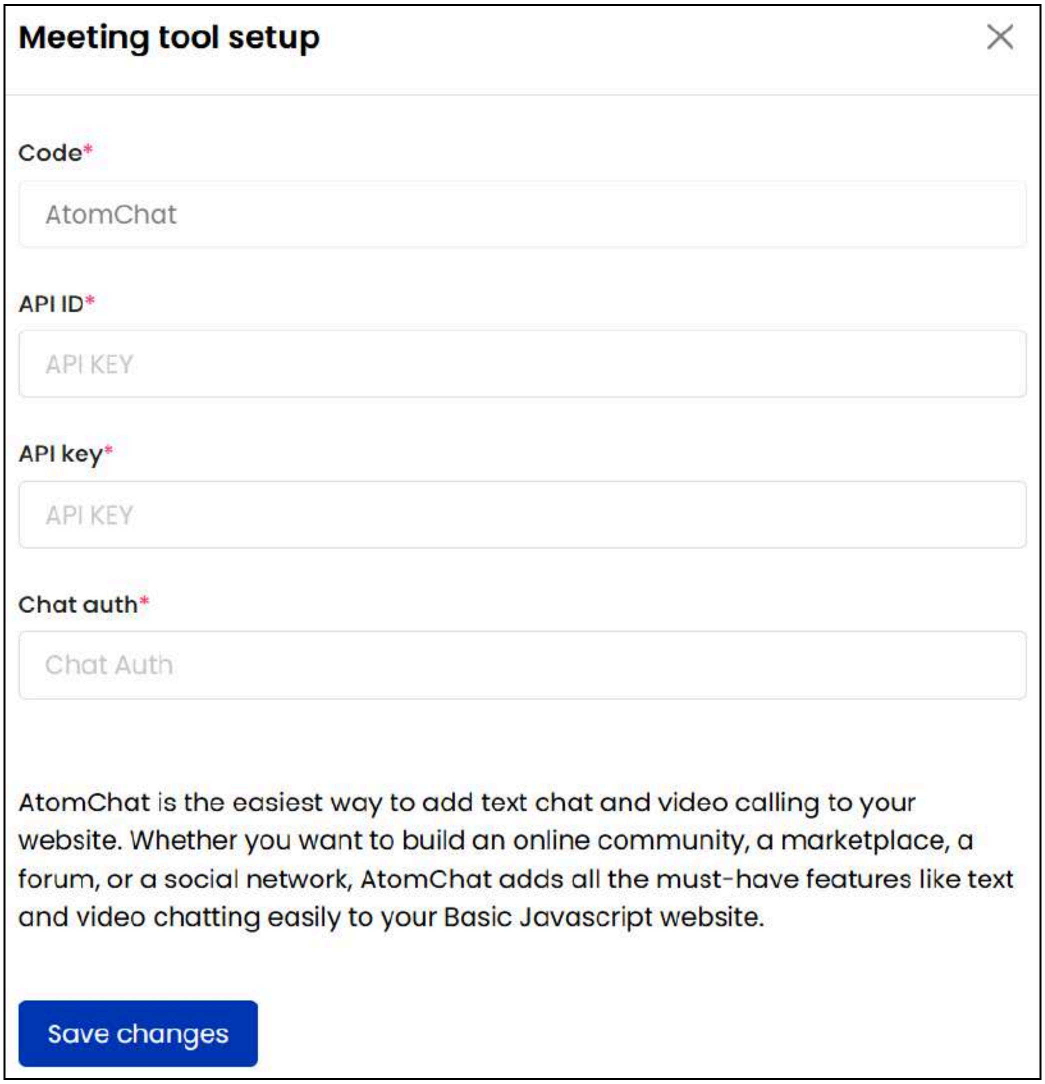


Update the following fields for this API after generating the required keys from their platform:

- **Code*:** This is the name of the meeting tool, and it cannot be edited.
- **API key*:** Enter the API key you generated from your LessonSpace account. This key allows your platform to securely communicate with LessonSpace.
- **Recording:** Select whether you want to allow session recording in LessonSpace. If you activate this feature, sessions will be recorded and can later be accessed for review.

Once done, click **Save changes**.

ii. AtomChat



Update the following fields for this API after generating the required keys from their platform:

- **Code*:** This is the name of the meeting tool, and it cannot be edited.
- **API ID*:** Enter the API ID associated with your AtomChat account. This unique identifier is required to establish a secure connection between your platform and AtomChat services.
- **API key*:** Enter the API key generated from your AtomChat account. This key authenticates requests between your platform and AtomChat, allowing access to chat and video call functionalities.

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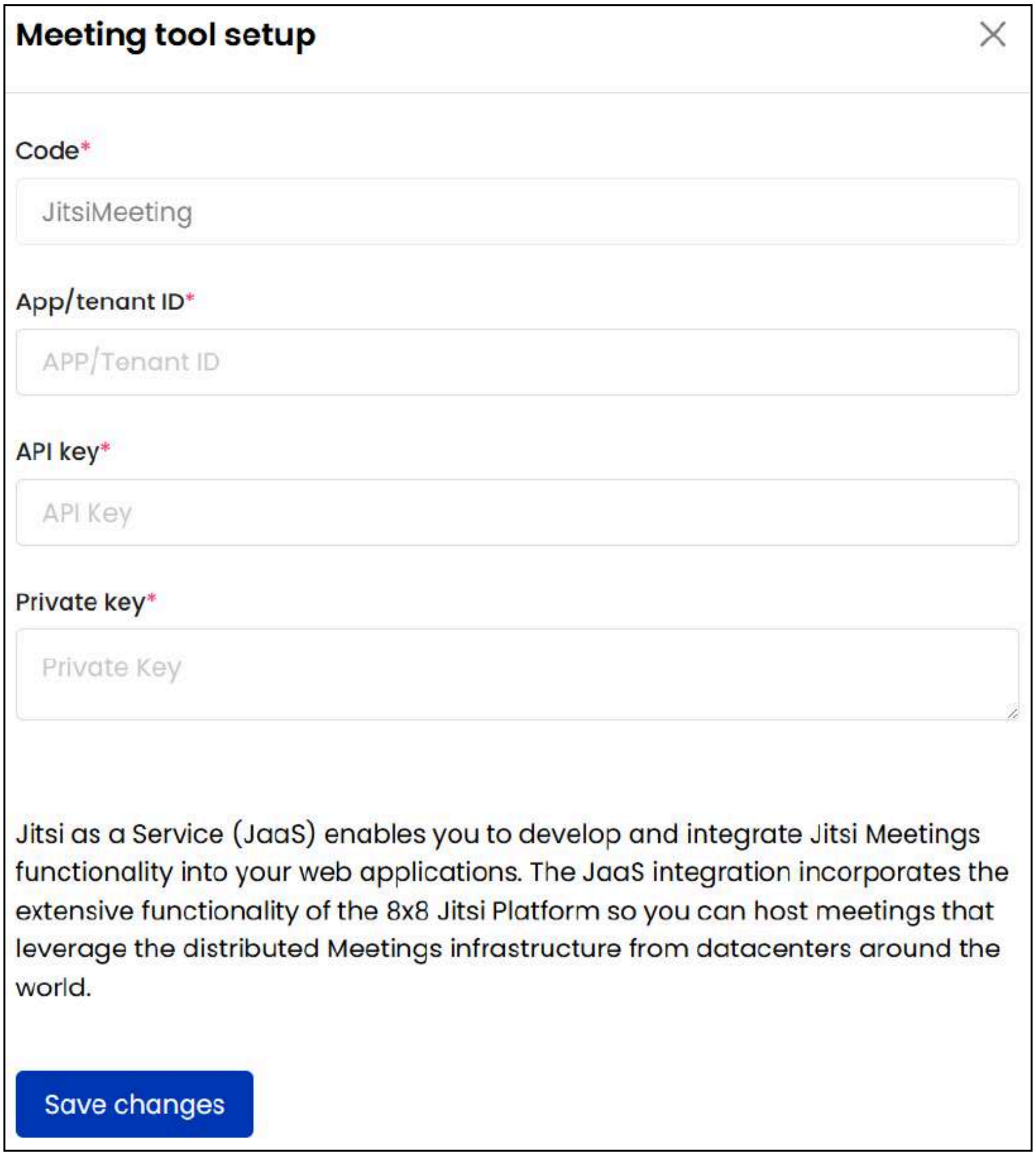
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

- **Chat auth*:** Enter the Chat Auth key provided by AtomChat. This key is necessary to authorize chat-related actions on your platform.

Once done, click **Save changes**.

iii. JitsiMeeting



Update the following fields for this API after generating the required keys from their platform:

- **Code*:** This is the name of the meeting tool, and it cannot be edited.

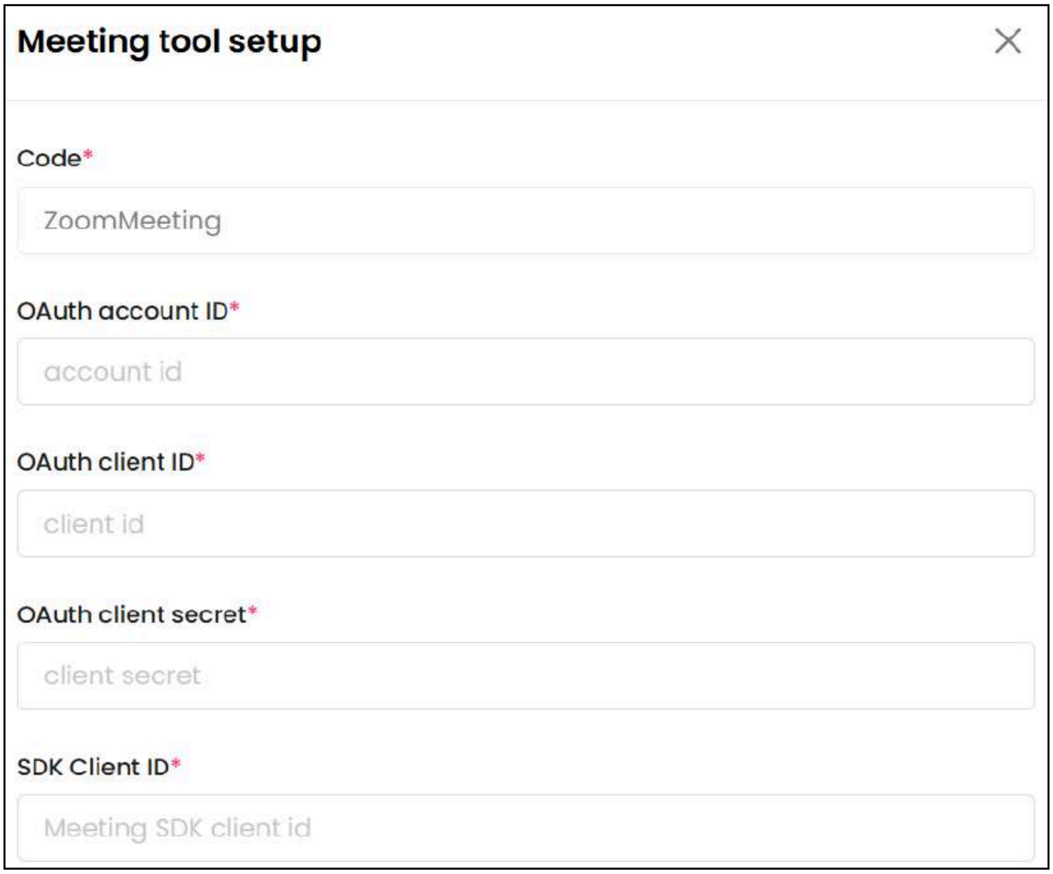
DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

- **App/tenant ID*:** Enter the App ID or Tenant ID associated with your Jitsi as a Service (JaaS) account. This value links your JitsiMeeting integration to the correct JaaS tenant under your 8x8 account.
- **API key*:** Enter the API key generated in your JaaS account. This key allows secure communication between your platform and the Jitsi service, enabling meetings to be created and managed from your site.
- **Private key*:** Enter the private key associated with your Jitsi API key. This key is used to sign tokens (JWTs) required for authenticating and authorizing users in your video meetings.

  ! *Ensure that the private key is copied in its entirety, including the “BEGIN” and “END” lines, and that no extra spaces or line breaks are introduced.*

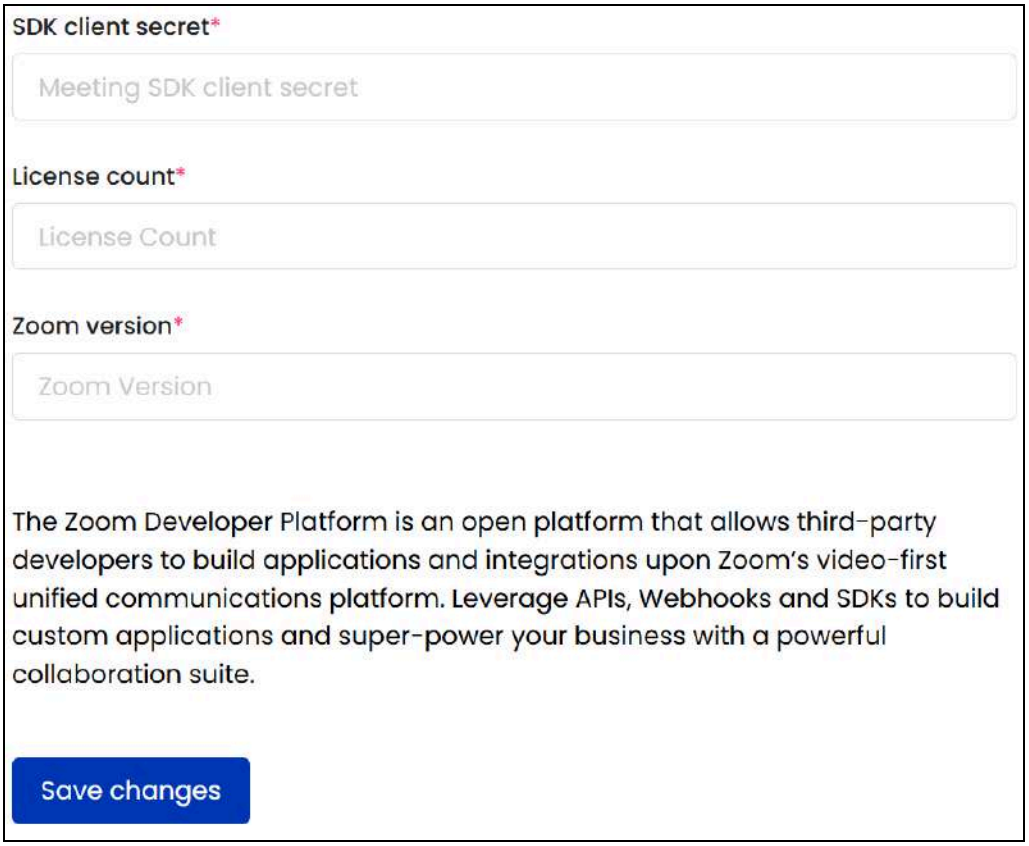
Once done, click **Save changes**.

iv. ZoomMeeting



Update the following fields for this API after generating the required keys from their platform:

- **Code*:** This is the name of the meeting tool, and it cannot be edited.
- **OAuth account ID*:** Enter the account ID associated with your Zoom OAuth app. This ID links the Zoom account to your integration and is required for secure communication.
- **OAuth client ID*:** Enter the client ID of your Zoom OAuth app. This value identifies your application to Zoom's servers and is required to generate access tokens.
- **OAuth client secret*:** Enter the client secret for your Zoom OAuth app. This value works together with the client ID to authenticate your app when requesting access tokens.
- **SDK Client ID*:** Enter the client ID for your Zoom Meeting SDK app. This value is different from the OAuth client ID and is used specifically for SDK-based integrations.



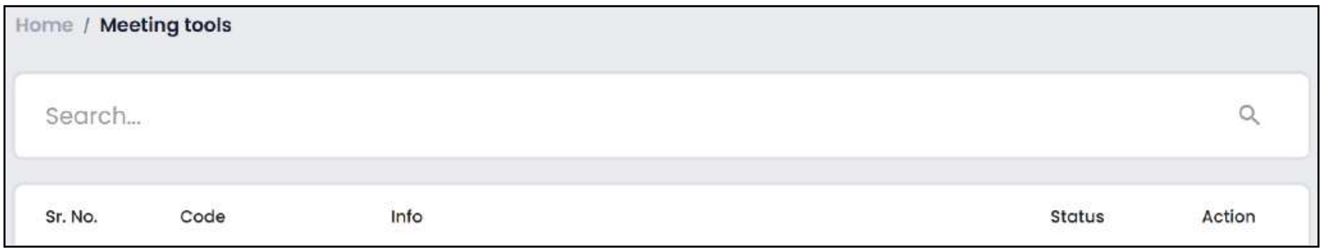
- **SDK client secret*:** Enter the client secret associated with your Zoom SDK client ID. This value is needed to securely authorize requests from your application through the SDK.

- **License count*:** Enter the number of Zoom licenses assigned for integration. This count determines how many users or sessions your system can handle using Zoom.
- **Zoom version*:** Enter the version of Zoom or the SDK that your integration supports. Use the version number that matches the Zoom SDK or API you are currently using. This helps maintain compatibility between your system and Zoom's services.

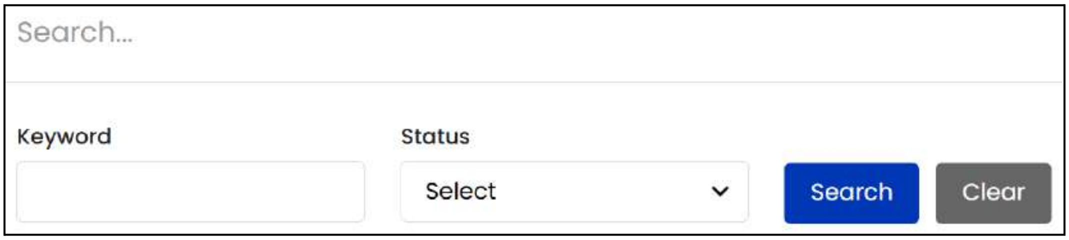
Once done, click **Save changes**.

Search for a meeting tool

Use the search functionality at the top of the list to find a specific meeting tool.



Click the search bar or to expand it. Click or the search bar again to collapse the section.



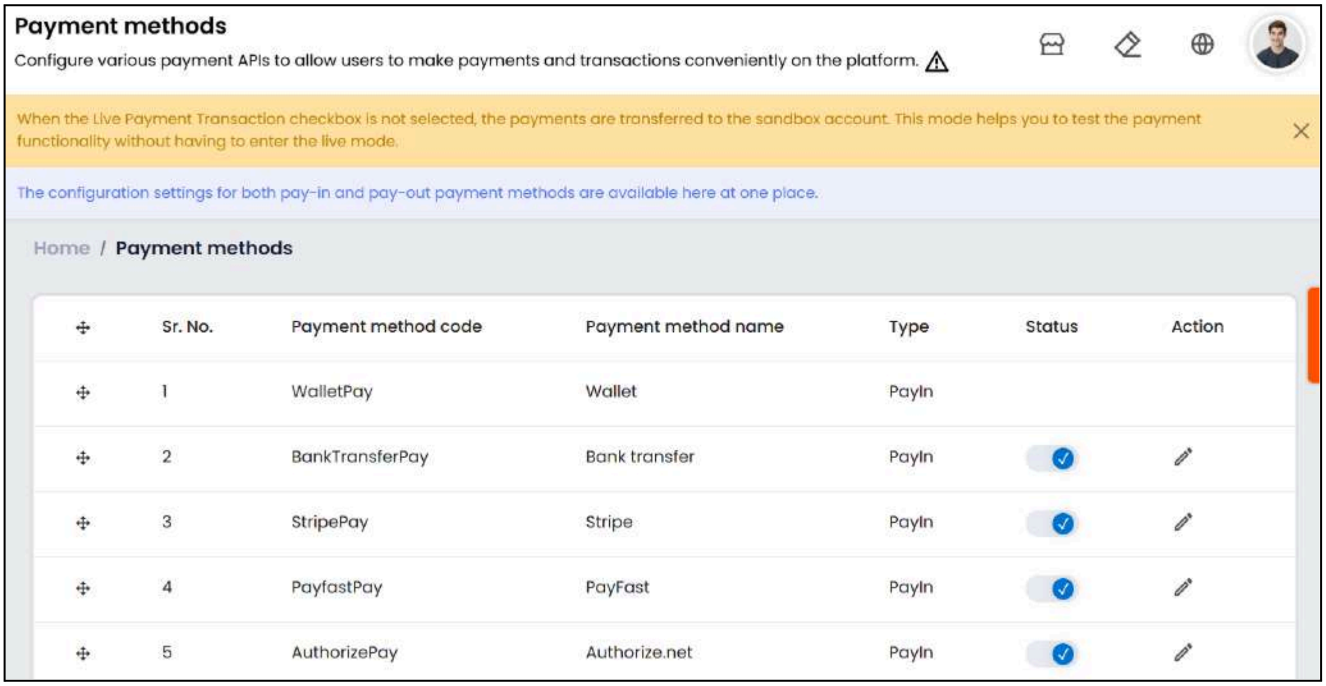
There are several filters that help narrow down the search. Each field is explained below:

- **Keyword:** Enter the name of the meeting tool in this field.
- **Status:** Click the field and select the status of the meeting tool from the dropdown menu options that include active and inactive.

Search for a meeting tool by filling in a single field or both fields. After filling in the desired fields, click **Search** to display the results. Click **Clear search** to reset all fields and start a new search.

11.3 Payment methods

Yo!Coach supports a variety of payment methods that allow platform users to pay for services or withdraw wallet balances, depending on their roles.



Yo!Coach allows the users to complete transactions using a number of payment methods (third-party APIs) and the system's own digital wallet.

By default, there are 11 payment methods integrated in the platform and are categorized based on their function:

- **PayIn methods** – These payment methods are displayed on the checkout page when learners pay for a session, purchase a gift card, or recharge their wallet.

  The platform supports the following 9 PayIn methods

  - PayPal standard
  - Stripe
  - Authorize.Net
  - PayGate
  - Paystack
  - PayFast
  - M-Pesa Pay
  - Bank transfer

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- Wallet

- **Payout methods** –These payment methods are used by teachers and learners to withdraw funds from their wallet. The options are displayed on the user's dashboard, and withdrawal requests are submitted using the selected method.

  Once a request is submitted, the funds are sent through the chosen payout method after admin approval.

  The platform supports the following 2 Payout methods:

  - **PayPal Payout (semi-automatic method):** Users can request a withdrawal to their PayPal account. Once submitted, the request appears under **Users >** Wallet withdrawal requests.

    As the admin, you must review and **either accept or reject** the request:

    - **Rejecting** the request notifies the user, and no funds are transferred to the selected payment method. The user's wallet balance also remains unchanged.
    - **Accepting** the request initiates an automatic transfer from your PayPal account to the user's PayPal account.

    When you accept the request, the amount is sent automatically to the user's PayPal account from your PayPal account (which you should have added under the PayPal payout settings) - and after the set transaction fee is deducted.

  - **Bank Payout (manual method):** Marked as a manual method because the system does not process bank transfers automatically.

    Users share their bank account details during the request. After the request is submitted, it appears under **Users >** Wallet withdrawal requests.

    As the admin, you need to:

    - Manually transfer the requested amount to the user's bank account using the shared details.
    - After the transfer is complete, return to the Wallet withdrawal requests section and update the request's status to reflect the payout transaction on the platform.

Points to note

- At least one payment method must be configured before the website can start accepting transactions.
- As the admin, you do not have a wallet on the platform.
- All payments made by users—whether for bookings, gift cards, or other purchases—are transferred directly to the account you have configured for that payment method. This can be a bank account, PayPal account, or any other supported PayIn method.
- If no payment method is configured:
  - Learners will not be able to book any lessons, classes, or courses on the platform.
  - No lessons or classes can be conducted.

Manage the payment methods list


Home / Payment methods

	Sr. No.	Payment method code	Payment method name	Type	Status	Action
	1	WalletPay	Wallet	Payin		
	2	BankTransferPay	Bank transfer	Payin		

Each entry in the list includes the following details and provides options for management including:

- **Drag-and-drop :** Click this next to a payment method to move it up or down the list, and the serial numbers will automatically update to reflect the new sequence. The payment method will appear in the same order on the front end of the platform.
- **Sr. No:** The serial number.
- **Payment method code:** This is the payment method's system identifier, used to save data in the system and not displayed anywhere on the platform.

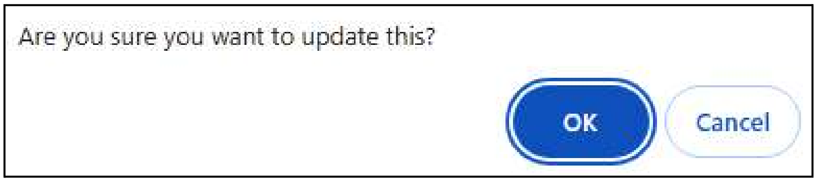
- **Payment method name:** The payment method name displayed throughout the platform and in the relevant lists.
- **Type:** The payment method type, which can be PayIn or Payout method.
- **Status:** Edit the status (activate or deactivate) of a payment method as per your requirements using the toggle switch beside it, under the status column.

Turn **on**  the toggle switch beside the payment method to activate it.

To use a payment method, you must also configure it by entering the required API keys using the [Edit button](#) next to it. The tool will not function unless it is both active and properly configured.

Leave this **off** or turn it **off** to deactivate the payment method.

A warning dialog box will appear for both actions, asking if you want to update the status or not.



Click **Ok** to delete it or **Cancel** to abort the action.

Action buttons

Under the **Action** column, each entry displays one or two buttons, depending on the payment method type.

PayIn payment methods *have only one action button—[Edit](#)—used to enter API keys for configuration, excluding the* ***Wallet*** *payment method..*

Payout methods *include a [Txn fee](#) button to set a fee, and in some cases, an [Edit](#) button as well. The* ***Bank payout*** *method shows only the* ***Transactions*** *button, while the [PayPal payout](#) method includes both.*

The function of each button is described in detail below.

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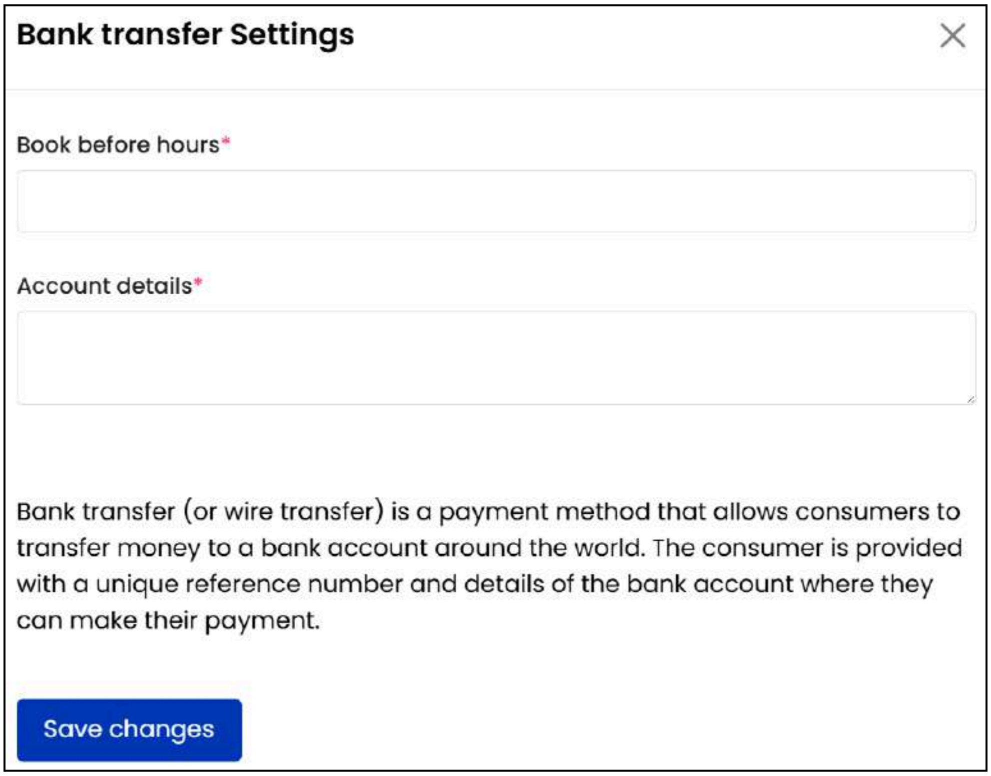
i. Edit

Click this button beside a payment method to configure it. Each plugin typically has a unique configuration process, so the forms will vary.

11.3.1 Bank transfer (PayIn)

Bank transfer (or wire transfer) is a payment method that allows users to transfer money to any bank account around the world.



Update the following:

- **Book before hours*:** Enter the number of hours required between the time of payment and the start of the booked class or lesson session.

  For example, if you enter 5 in this field and a learner tries to book a class that starts in 4 hours, they will not be able to pay via bank transfer payment method (as it won't be visible to them).

  This setting ensures that payment must be completed at least the specified number of hours before the session begins.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
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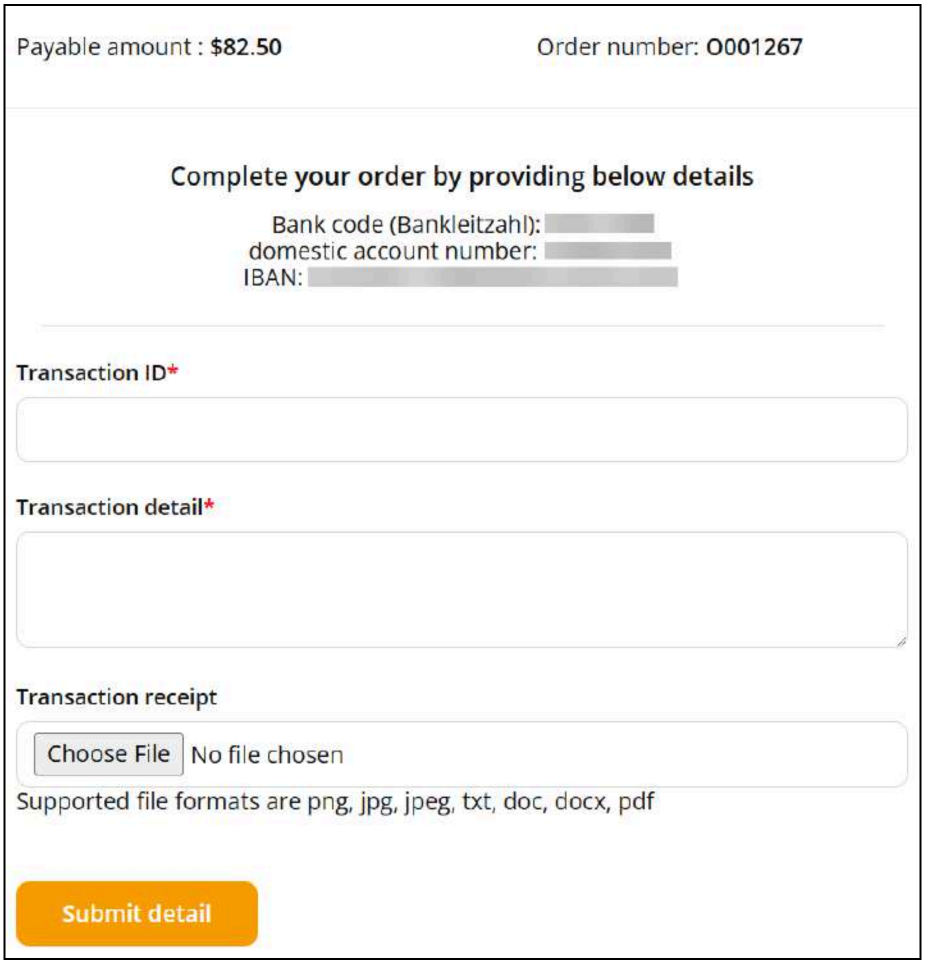
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

- **Account details*:** Enter your bank account details including the bank name, account number, account name, IFSC/SWIFT code, and any other information that is important to make a transfer as per your country's norms.

Click **Save changes**.

How does it work?

The bank transfer method is the only payment option that is not managed by the system and must be processed manually. When a user selects this method at checkout, they are directed to a form that displays your bank account details (as shown below).



The user must then manually transfer the payment to your account using the provided information. After completing the transfer, the user must fill out the form with the following details:

__DISCLAIMER:__ The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

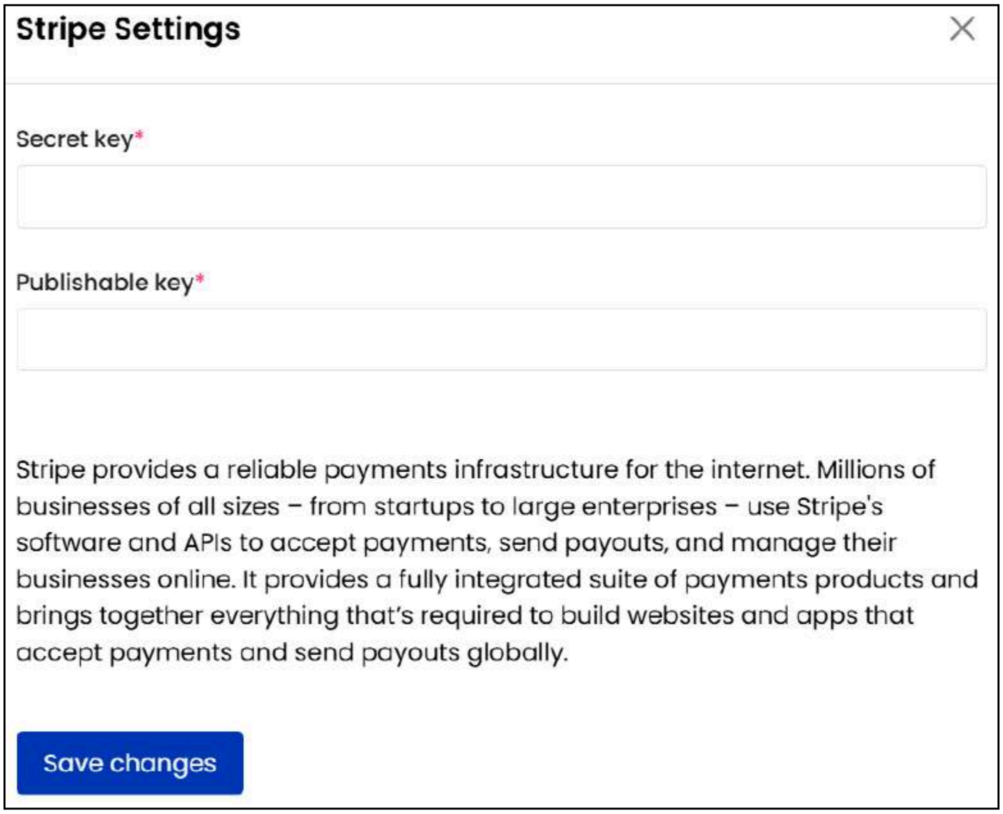
- **Transaction ID*:** Enter the transaction ID of the payment.
- **Transaction details*:** Provide any additional relevant details about the transaction.
- **Transaction receipt:** Upload proof of payment by clicking **Choose file**, selecting the image from their system, and uploading it.

Once done, click **Submit details**.

After submitting the form, these details will be added to the related job order page. You can review the transaction under **Orders > [All orders]**, by clicking the [View button] for the respective order.

11.3.2 Stripe (payIn)

Stripe is a global payment service provider that allows you to accept payments through debit and credit cards from users worldwide. A transaction fee is charged by Stripe for each payment.



Generate the configuration keys. Then, enter the keys in the provided form:

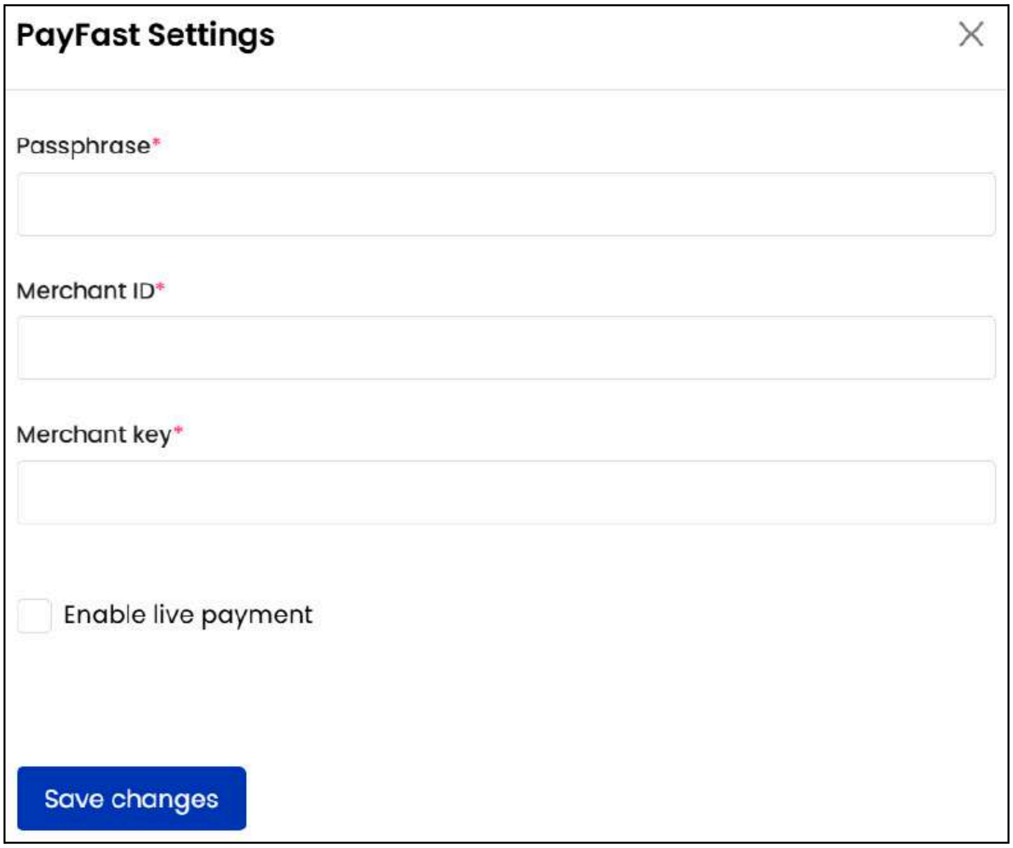
- **Secret key*:** Paste your secret key.

- **Publishable key*:** Paste your publishable key.

Click **Save changes**.

11.3.3 PayFast (payIn)

PayFast is a secure South African payment gateway that enables you to receive online payments through multiple channels.



Generate the configuration keys. Then, enter the keys in the provided form:

- **Passphrase*:** Enter your PayFast passphrase.
- **Merchant ID*:** Paste your unique merchant ID.
- **Merchant key*:** Paste your merchant key.
- **Enable live payment:** Check mark this to activate the live (production) environment and start real-time transactions.

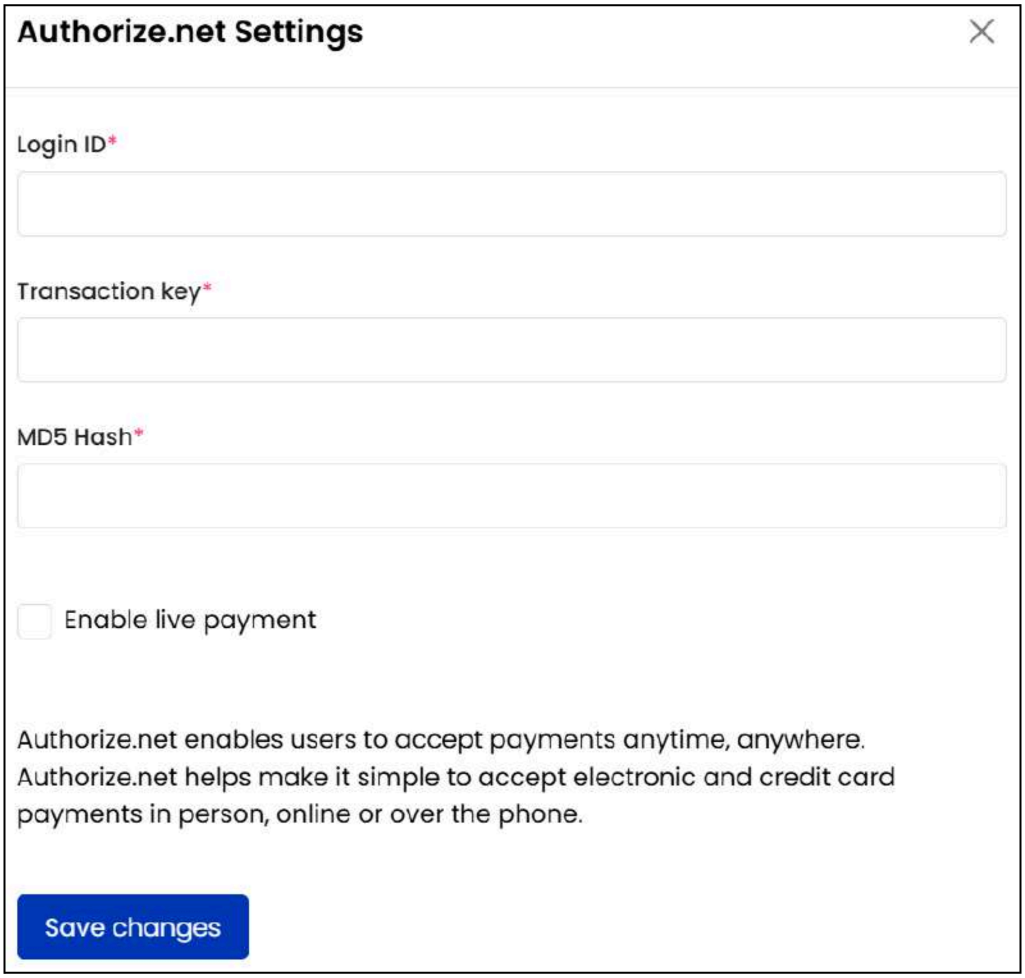
  If not selected, the system uses the sandbox environment—a testing mode that simulates real transactions without making actual changes or payments.

Make sure the keys you enter match the selected environment. Mismatched keys and environments may cause errors.

Click **Save changes**.

11.3.4 Authorize.Net (payIn)

Authorize.Net makes it easy to accept electronic and credit card payments in person, online, or over the phone.



Generate the configuration keys. Then, enter the keys in the provided form:

- **Login ID*:** Enter the login ID from your Authorize.Net account.
- **Transaction key*:** Enter the transaction key you generated.
- **MD5 hash*:** Enter the MD5 hash provided by Authorize.Net.

- **Enable live payment:** Check mark this to activate the live (production) environment and start real-time transactions.

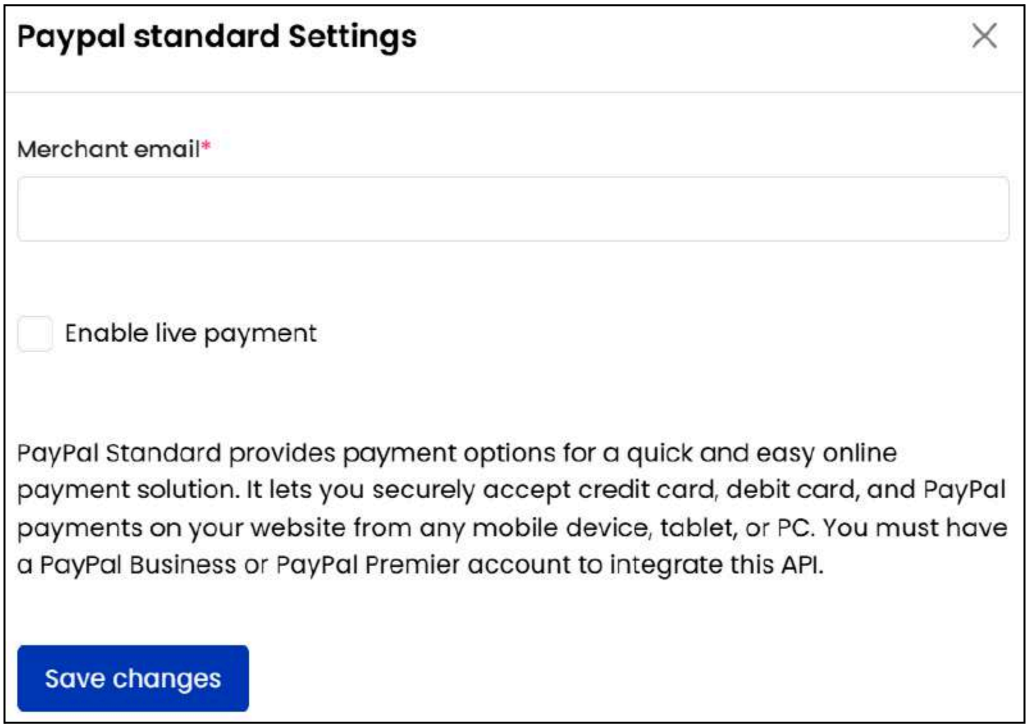
  If not selected, the system uses the sandbox environment—a testing mode that simulates real transactions without making actual changes or payments.

  Make sure the keys you enter match the selected environment. Mismatched keys and environments may cause errors.

Click **Save changes**.

11.3.5 PayPal standard (payIn)

PayPal Standard provides payment options for a quick and easy online payment solution. It lets you securely accept credit card, debit card, and PayPal payments on your website from any mobile device, tablet, or PC. You must have a PayPal Business or PayPal Premier account to integrate this API.



Generate the configuration keys. Then, enter the keys in the provided form:

- **Merchant email*:** Enter the email address that receives payments. This can be your personal or company email address, as long as it is associated with a PayPal Business account.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

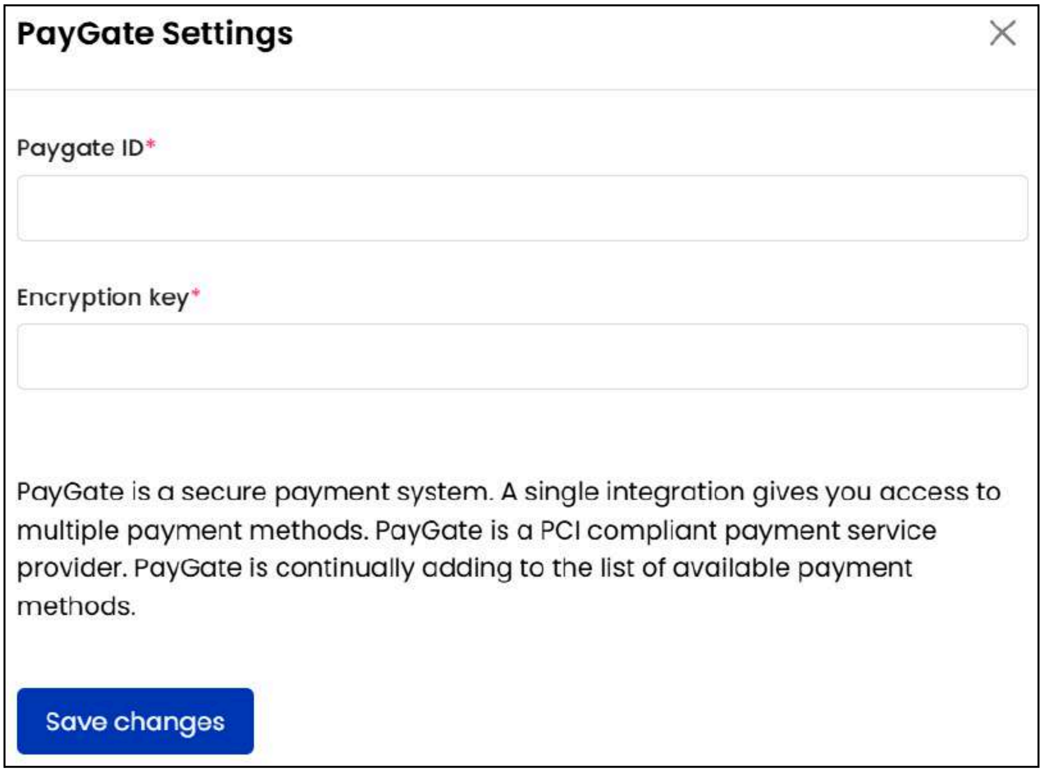
- **Enable live payment:** Check mark this to activate the live (production) environment and start real-time transactions.If not selected, the system uses the sandbox environment—a testing mode that simulates real transactions without making actual changes or payments.

  Make sure the keys you enter match the selected environment. Mismatched keys and environments may cause errors.

Click **Save changes**.

11.3.6 PayGate (payIn)

PayGate provides a wide range of payment and credit card processing services for businesses around the globe.



Generate the configuration keys. Then, enter the keys in the provided form:

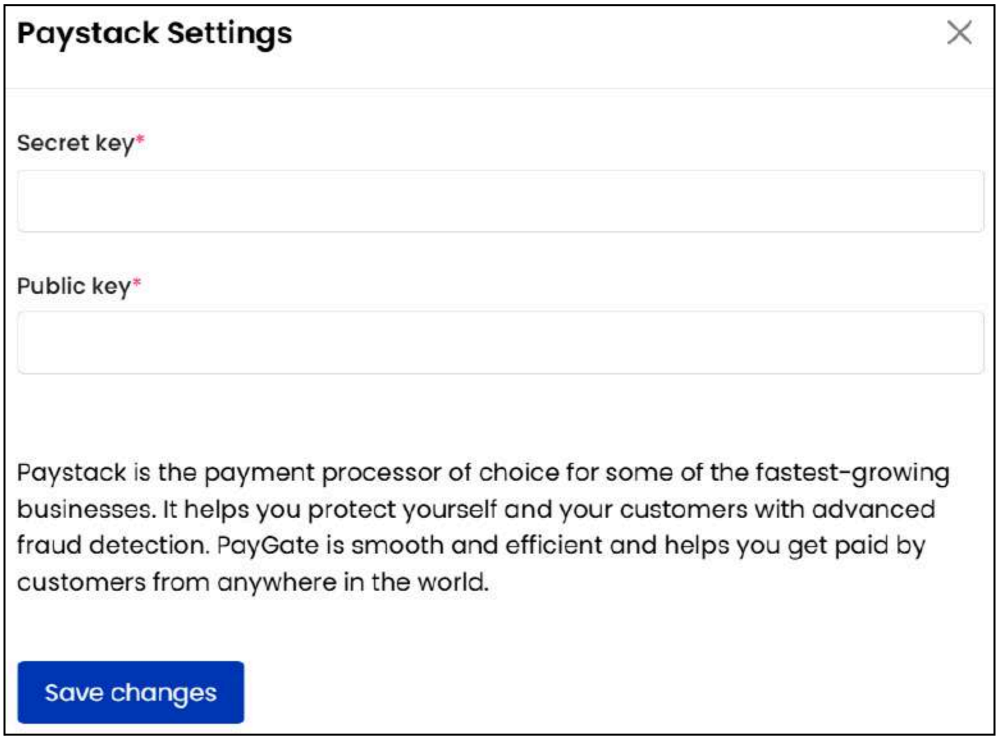
- **PayGate ID*:** Enter the generated PayGate ID.
- **Encryption key*:** Enter the generated encryption key.

Click **Save changes**.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

11.3.7 Paystack (payIn)

Paystack provides an online payment platform and a Point-of-Sale (PoS) terminal service that enables seamless and secure payments for goods and services.



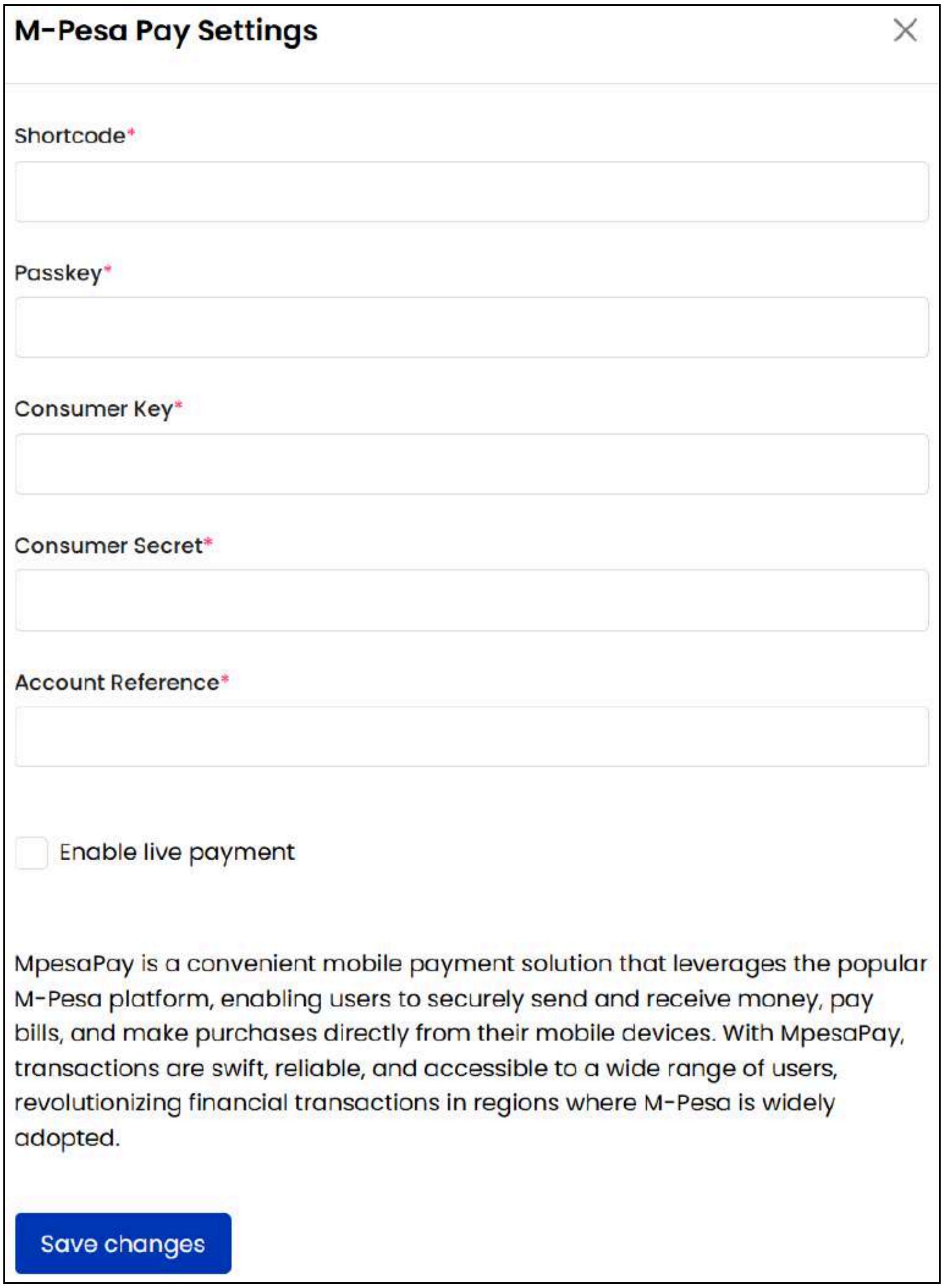
Generate the configuration keys. Then, enter the keys in the provided form:

- **Secret key*:** Enter the generated secret key.
- **Public key*:** Enter the generated public key.

Click **Save changes**.

11.3.8 M-Pesa Pay (payIn)

MpesaPay is a mobile payment solution built on the M-Pesa platform. It allows users to securely send and receive money, pay bills, and complete purchases directly from their mobile devices.



Generate the configuration keys. Then, enter the keys in the provided form:

- **Shortcode*:** Enter the shortcode provided by M-Pesa.
- **Passkey*:** Enter the generated passkey.
- **Consumer key*:** Enter the generated consumer key.
- **Consumer secret*:** Enter the generated consumer secret.

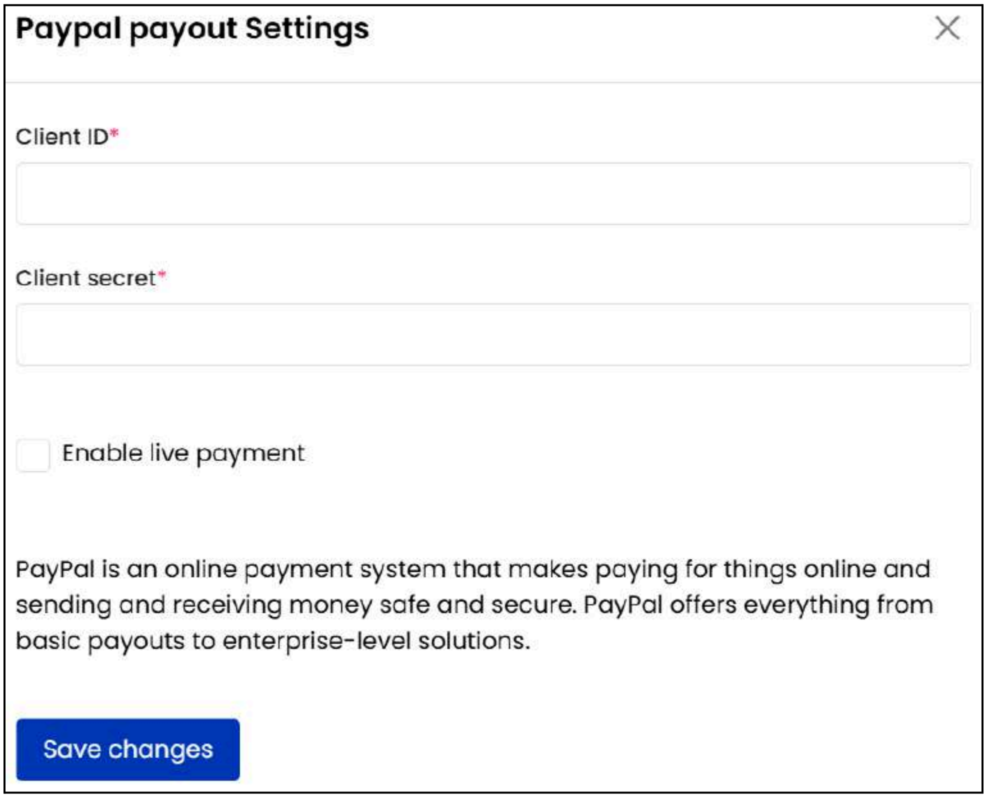
- **Account reference*:** Enter the assigned account reference.
- **Enable live payment:** Check mark this to activate the live (production) environment and start real-time transactions.If not selected, the system uses the sandbox environment—a testing mode that simulates real transactions without making actual changes or payments.

  Make sure the keys you enter match the selected environment. Mismatched keys and environments may cause errors.

Click **Save changes**.

11.3.9 PayPal payout

PayPal offers flexible payment solutions for businesses of all sizes. With PayPal Payouts, you can send money to multiple recipients quickly and securely.



Generate the configuration keys. Then, enter the keys in the provided form:

- **Client ID*:** Enter the client ID generated.
- **Client secret*:** Enter the client secret generated.

- **Enable live payment:** Check mark this to activate the live (production) environment and start real-time transactions.

  If not selected, the system uses the sandbox environment—a testing mode that simulates real transactions without making actual changes or payments.

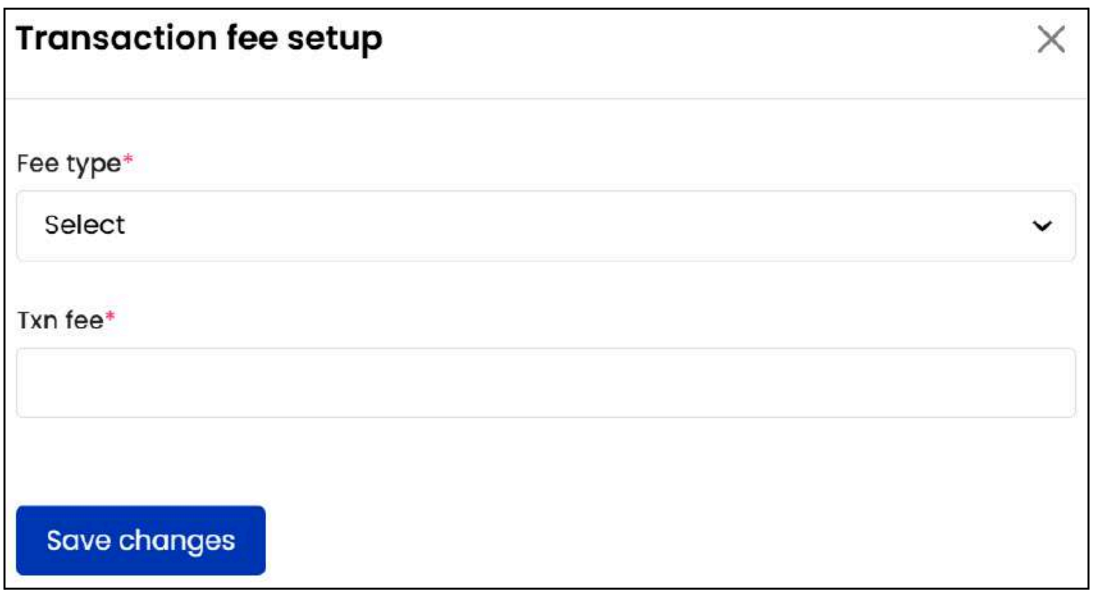
  Make sure the keys you enter match the selected environment. Mismatched keys and environments may cause errors.

Click **Save changes**.

ii. Txn fee

This button is available only for **Bank payout** and **PayPal payout**. Click the button next to the payment method to define its transaction fee.

The **Transaction fee setup** form will open. The form is the same for both payout methods.



Update the following:

- **Fee type*:** Click the field and select the type of fee to charge on the withdrawn amount from the dropdown list with the following options:
  - Flat value
  - Percentage

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

- **Transaction fee*:** Enter the fee amount based on the selected fee type.
    - If you select Percentage and enter 10, the fee will be 10% of the total amount.
    - If you select Flat value and enter 10 (with default currency as USD), the fee will be $10 per withdrawal.

Click **Save changes**.

The user pays this transaction fee to you. You can set any fee amount. However, you are responsible for covering any additional bank or PayPal charges deducted during the payout.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

11.4 Social platforms

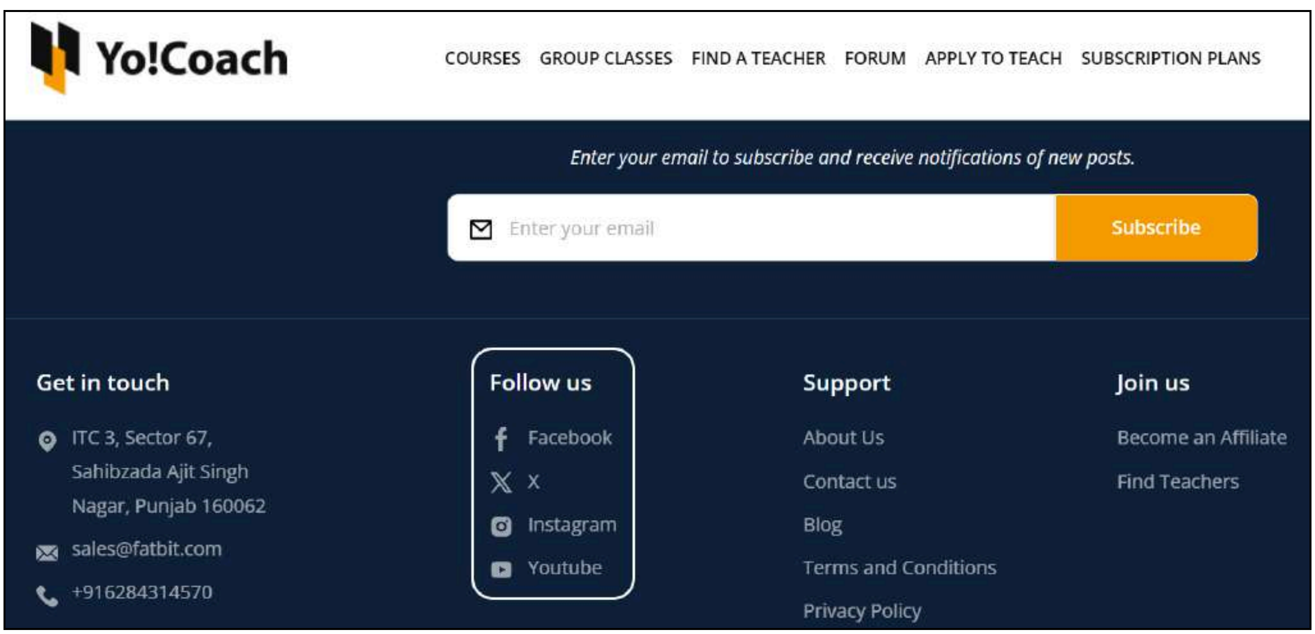
Set up all your business social media links that will be displayed on the front end footer section of your platform and are included in all outgoing system emails.

By default, all available social media platforms are listed here.

You cannot add new platforms to this list—only edit the link for each existing platform. To request a new platform, contact the FATbit support team.

Activated social media platforms will automatically appear in the following places:

1. Front end footer



DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
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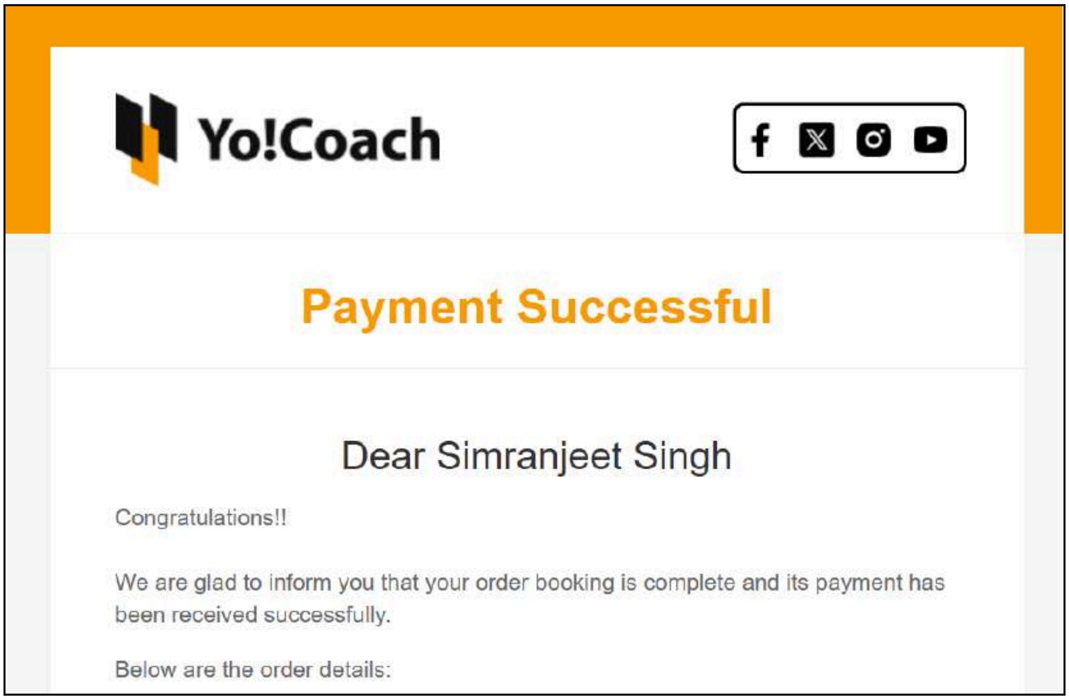
2. System-generated emails



Manage the social platforms list

Each entry in the list includes the following details and provides options for management including:

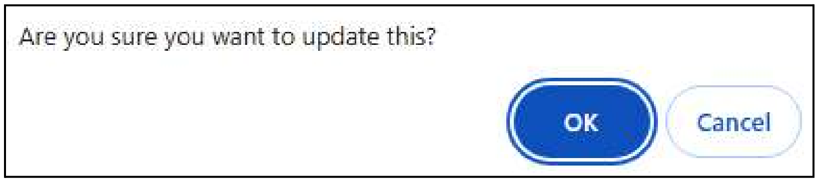
- **Sr. No:** The serial number.
- **Title:** The social platform title that will be displayed when a user hovers over the respective social platform icon at the front end.
- **URL:** The URL of the social platform profile that is hyperlinked to the social platform icon.
- **Status:** Edit the status (activate or deactivate) of a social platform link as per your requirements using the toggle switch beside it, under the status column.

<u>**DISCLAIMER:**</u> The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

Turn **on** the toggle switch beside the social platform link to activate it.

Leave this **off** or turn it **off** to deactivate the social platform link. It will no longer appear on the front end or in system emails.

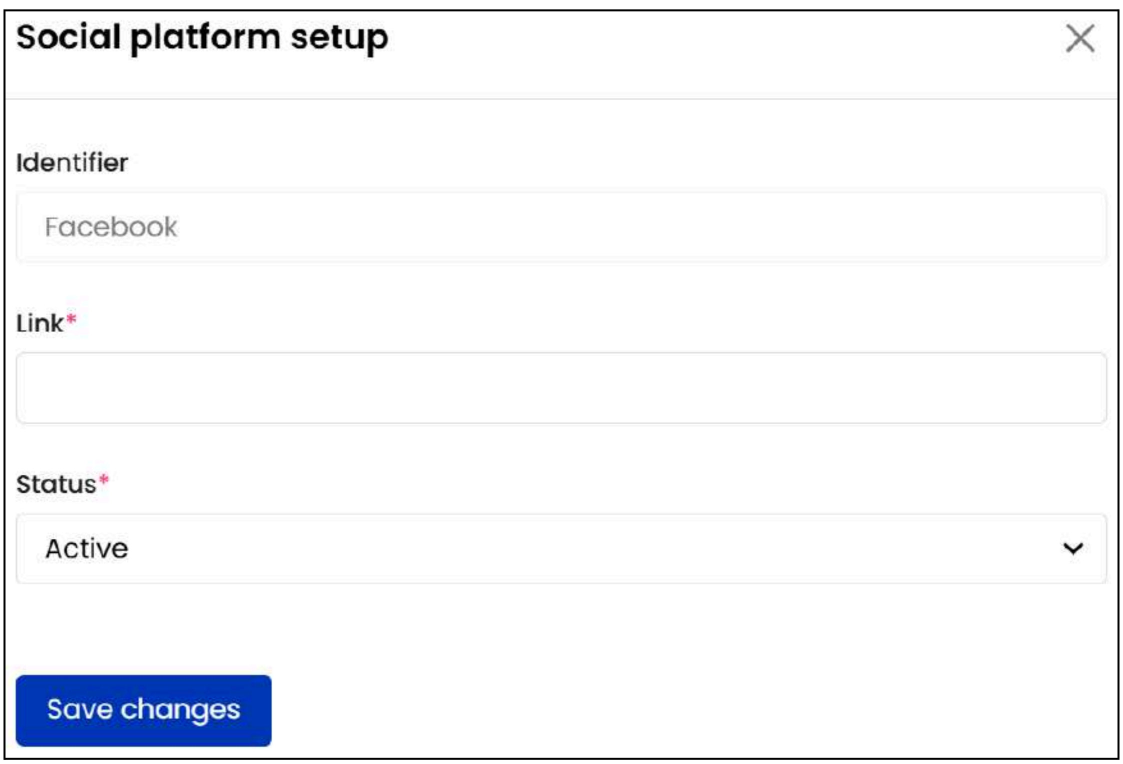
A warning dialog box will appear for both actions, asking if you want to update the status or not.



Click **Ok** to delete it or **Cancel** to abort the action.

Action button

Each entry has a single action button—**Edit** . Click this button to add your business's social media profile link for the selected platform. The social platform setup form will appear.



DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

Update the following:

- **Identifier*:** This is the unique ID of the social platform profile used to save data in the system. This field cannot be edited.
- **URL*:** Enter the URL of your social platform profile that you want the user to be directed to when they click on the social platform's image.
- **Status:** Select the status of the social platform.

  Click the field and select "**Active**" to publish it on the platform.

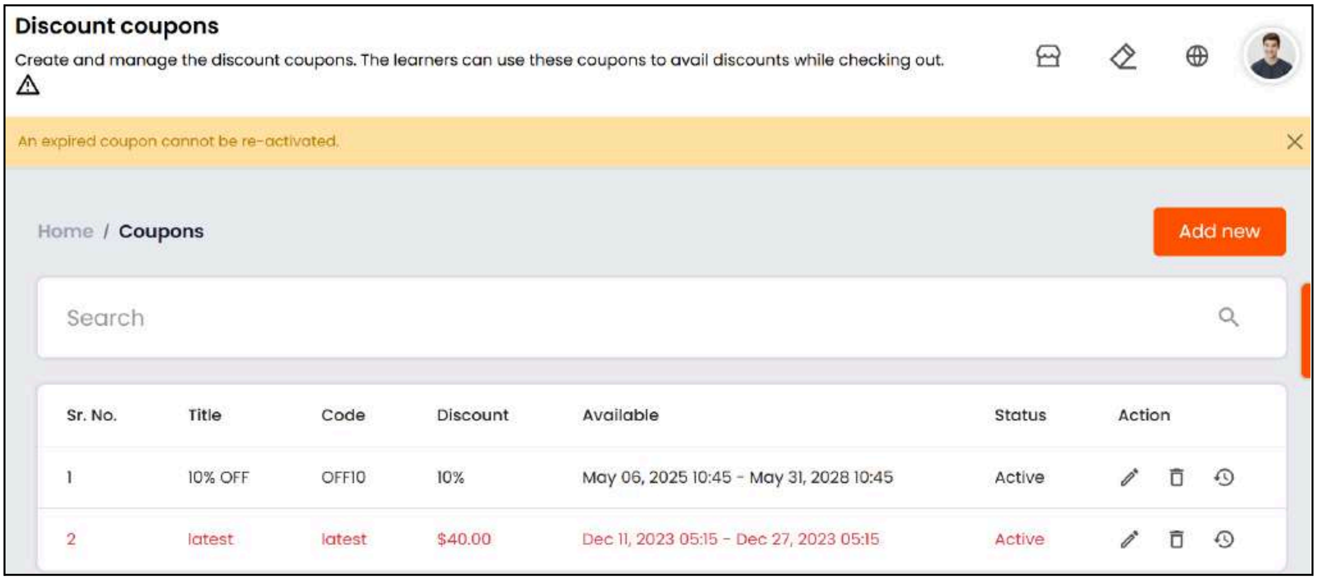
  Select "**Inactive**" to temporarily hide the social platform link; the respective social platform icon will not appear on the front end footer and in any system generated emails.

Once done, click **Save changes**.

11.5 Discount coupons

Use this submodule to create and manage all discount coupons available on the platform. Discount coupons allow learners to reduce the total amount payable during checkout.

All coupons—both valid and expired—are listed in this submodule. Valid coupons appear in black, while expired coupons are shown in red.



The list will be empty if you just bought the platform and didn't choose to have dummy content provided by FATbit during the platform installation.

How learners use coupons

At checkout, learners can click the **View coupons** link to see a list of available coupons.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
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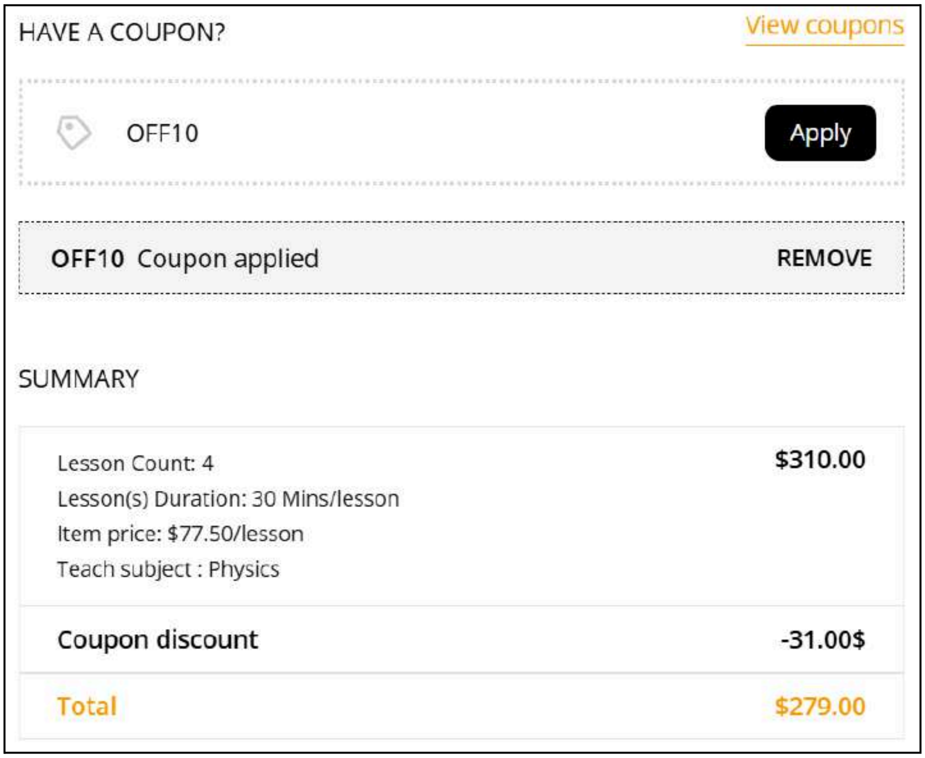
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

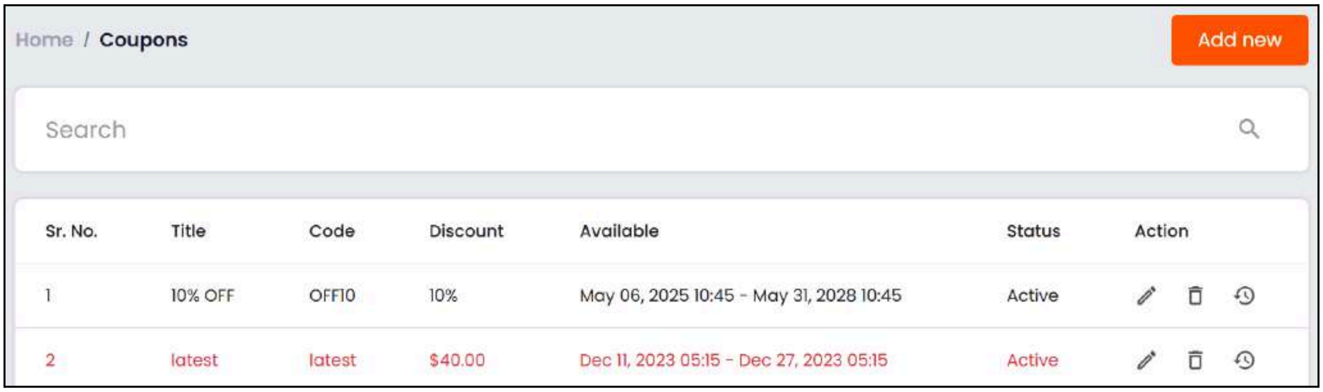
When they click the link, a section appears below the coupon field.

To use a coupon, learners must click **Apply** beside the coupon they want to use. The coupon code is automatically added to the **Enter coupon code** field, and the discount is applied to the total order price.



DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An asterisk (*) next to a label indicates that the information is mandatory.
The secondary language setting and tabs are ONLY available if you have selected more than one language for the platform.

Manage the discount coupons list

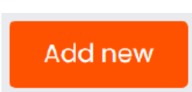


Each entry in the list includes the following details and provides options for management including:

- **Sr. No.:** The serial number.
- **Title:** The title of the coupon.
- **Code:** The coupon code that will be used to avail the discount amount.
- **Discount:** The discount offered by the respective coupon. There are two types of discounts, including:
    - **Percentage:** Examples - 15%, 10%, etc.
    - **Flat rate:** Examples - {default currency symbol}200.00, {default currency symbol}15.00, etc.
- **Available:** The validity period of the coupon.
- **Status:** The current system status of the discount coupon on the platform—either Active or Inactive.

> *A coupon can have an Active status in the system but still be Expired based on its validity period.*
> - *Active reflects the coupon's state in the platform.*
> - *Expired refers to the coupon's validity. Expired coupons are displayed in red.*

Add a discount coupon

Click 

in the upper-right corner of the page to open the **Coupon setup** form.

This form contains multiple tabs: the [General](#) tab, followed by the [Primary language](#) tab. After that, you'll find the [Secondary language](#) tabs, corresponding to the languages available on your platform. Let's start with the **General tab.**

General tab

Update the following:

- **Coupon identifier*:** Enter a unique coupon identifier. It can match the coupon name, as defined under the Language data tabs (e.g., English, Arabic, Spanish).

  The identifier is used to save data in the system and will not be displayed anywhere on the platform. Ensure the identifier is unique; otherwise, an error message will appear.

- **Coupon code*:** Enter the coupon code that will be used to avail the coupon during checkout. Ensure that this code is unique else an error will appear.
- **Discount type:** Click the field to select the type of discount from the dropdown list of options:
  - Percentage

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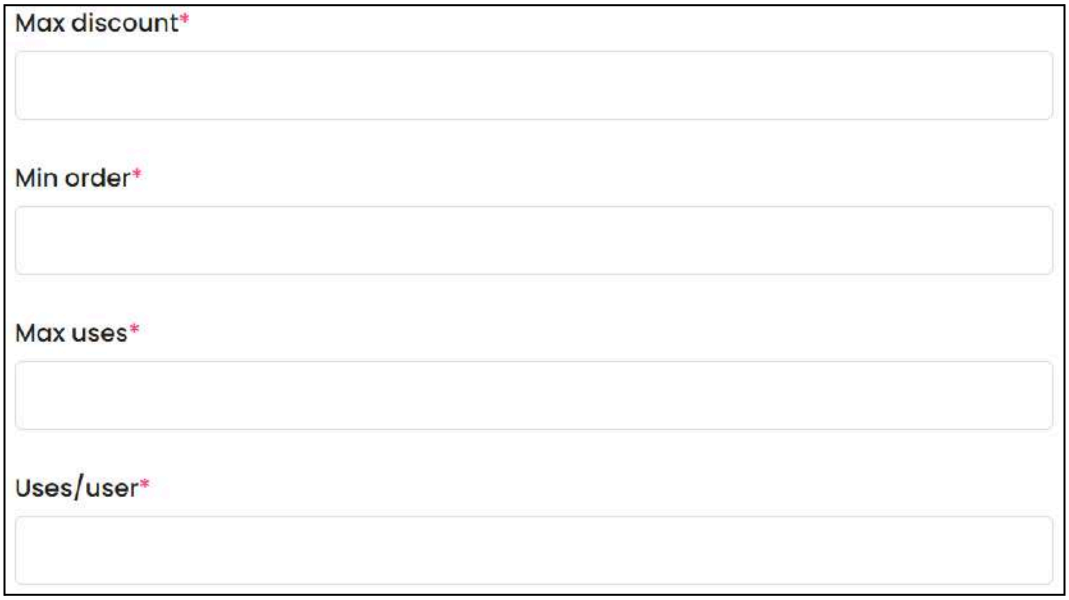
- Flat rate

- **Discount value*:** Enter the discount value based on the selected discount type.

  For example, if the discount type is Percentage and you enter 10, the coupon will apply a 10% discount on the purchase price.

  If the discount type is Flat and you enter 10, the coupon will apply a flat discount of 10 on the purchase price (purchase price – 10).



- **Max discount*:** Enter the maximum discount amount that can be deducted from the total purchase amount.

  For instance, if you enter 100 in this field, it means the maximum discount that can be applied to the purchase price is 100, regardless of the percentage value.

  This field will not be visible if you selected the Flat discount type.

- **Min order*:** Enter the minimum purchase amount required for the coupon to be applicable. If the purchase amount is lower than the value entered here, the coupon cannot be applied.

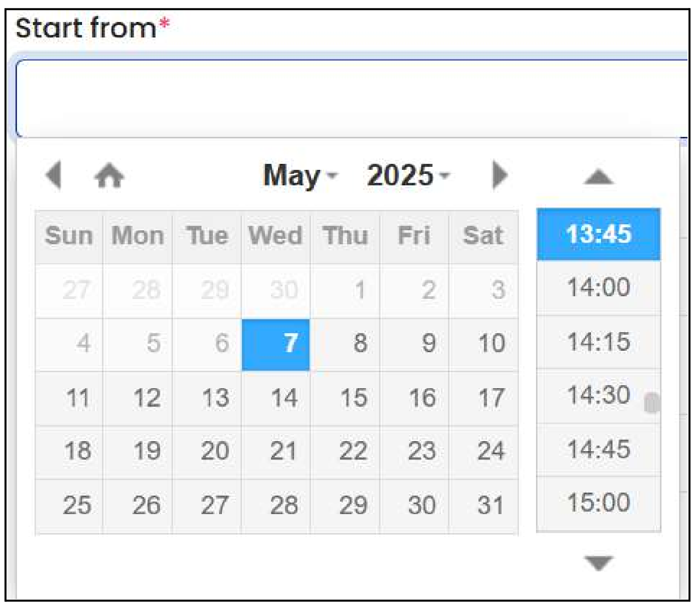
- **Max uses*:** Enter the total number of times the coupon can be used on the platform.

  By default, this field is set to 1, which means the coupon can be used only once. If one customer uses the coupon, it will no longer be available for others.

- **Uses/user*:** Enter the number of times a single customer can use this coupon.

By default, this field is also set to 1, which means each customer can use the coupon only once.

- **Start from:** Click the field and select the date and time from the calendar when the discount coupon should become valid.



- **End date:** Click the field and select the date and time from the calendar when the discount coupon should expire.

- **Coupon status:** Select the status of the coupon.

Click the field and select "**Active**" to publish the coupon on the platform and make it available for use.

An expired coupon can still be marked as Active, but it will not appear on the front end of the platform.

Select "**Inactive**" to temporarily hide the coupon. If a valid coupon is marked as "**Inactive**", it will not be displayed on the platform, and users will not be able to use it.

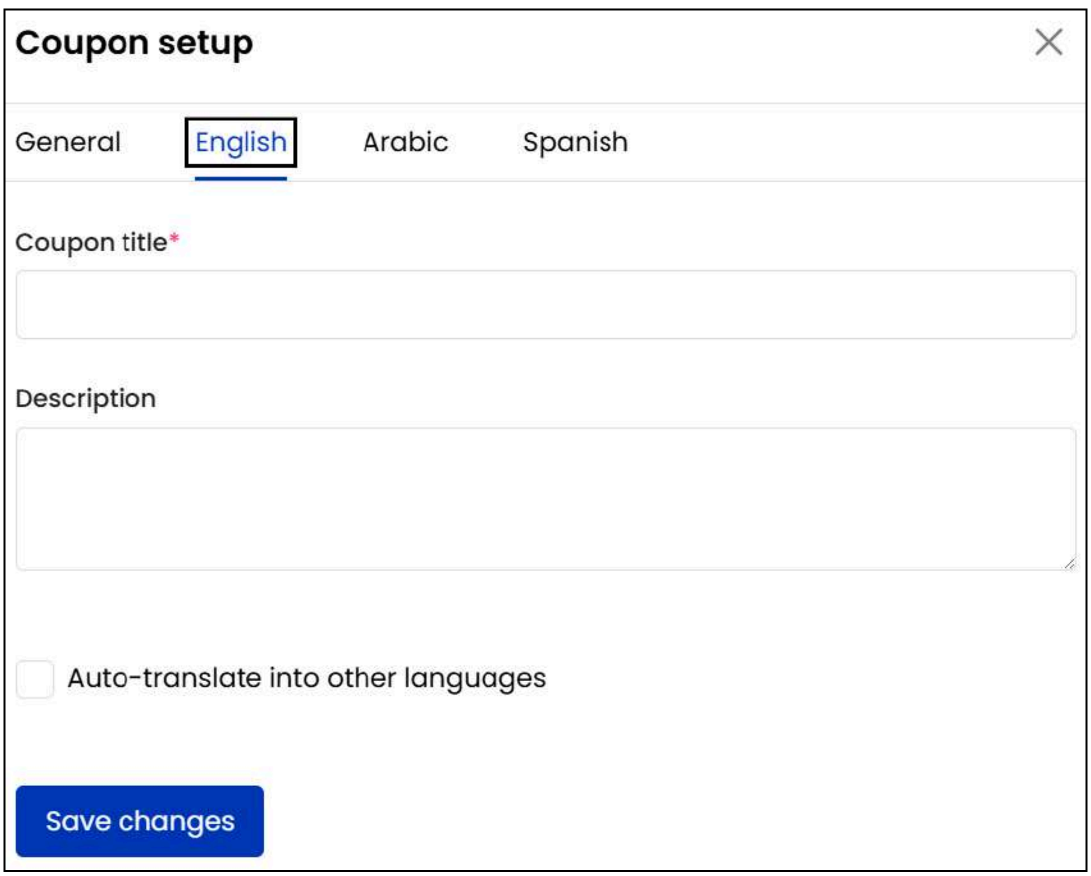
Once done, click **Save changes**.

This will direct you to the next tab, which is the primary language tab (English tab).

English tab

This is the primary language tab, and completing this tab is mandatory for publishing the discount coupon on the platform.

Since English is set as the primary language, this tab is labeled **English**.



<u>**DISCLAIMER:**</u> The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

Update the following:

- **Coupon title*:** Enter the coupon title. This will be displayed at the front end, on the checkout page.
- **Description:** Enter a description of the coupon. This section will be displayed beside the coupon code at the front end.
- **Auto-translate into other languages:** Check mark this to automatically update the secondary language(s) data. The data in the subsequent language tab(s) will be auto-filled.

  *This feature is available only if the Microsoft text translator API is configured under **Settings > System configurations >** Third-party APIs.*

  If you prefer to manually fill in the secondary language(s) data, leave the checkbox unselected.

Once done, click **Save changes**.

The next tab(s) will be the secondary language tab(s) (Arabic, Spanish, etc.), which include the same fields as the English tab.

*If you had selected the auto-translate option, the secondary language tab(s) will be prefilled. Review the data, make any necessary edits, click **Save changes**, and close the form.*

*If you did not use the auto-translate feature earlier, use the **Auto-translate & fill language data** button beside the **Save changes** button on each secondary language tab to auto-fill the secondary language fields. Then, click **Save changes**, and move to the next tab, or close the form.*

*If you do not want to fill the secondary language tab(s) at this time, complete only the primary language tab (English tab), click **Save changes**, and close the form.*

After updating all necessary fields, click in the upper-right corner of the form.

Action buttons

Under the **Action** column, each entry includes three action buttons, allowing you to perform specific actions.

The functions of each button are explained in detail below:

i. Edit

Click this to edit the discount coupon details.

The [Coupon setup] form will appear.

Update the fields, then click **Save changes**. To close the form, click in the upper-right corner.

ii. Delete

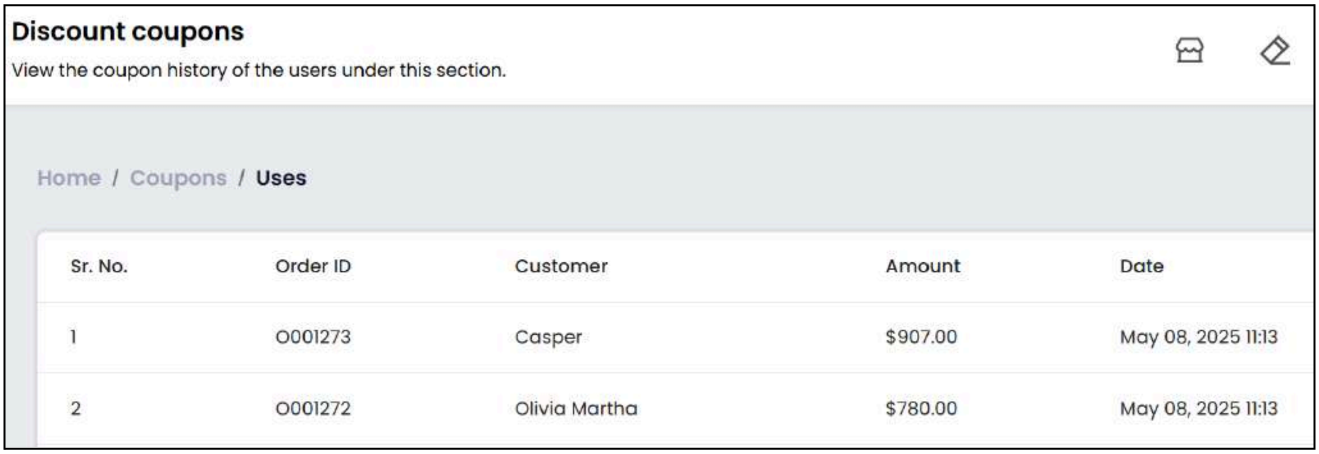
Click this to delete the coupon from the system. A confirmation message will appear.

Click **OK** to confirm the action or **Cancel** to abort it.

iii. History

Click this to view the history log for the selected coupon. This log displays the number of times the coupon was used.

You will be directed to a page that lists all instances of the coupon's usage.



Sr. No.	Order ID	Customer	Amount	Date
1	O001273	Casper	$907.00	May 08, 2025 11:13
2	O001272	Olivia Martha	$780.00	May 08, 2025 11:13

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The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

The list includes key details such as the order ID, customer name, order amount, and order date for each transaction where the coupon was applied.

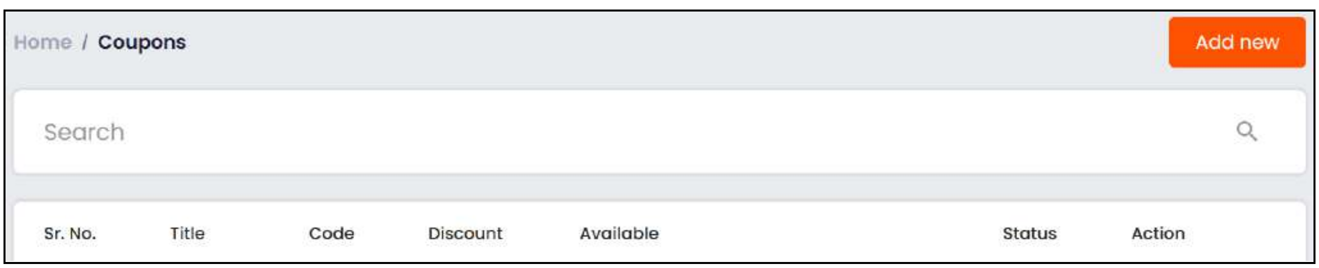
Review this information as needed to monitor and track how the coupon has been used over time.

After reviewing the information, go back to the **Discount coupons** page by clicking **Coupons** in the breadcrumbs at the top of this page.

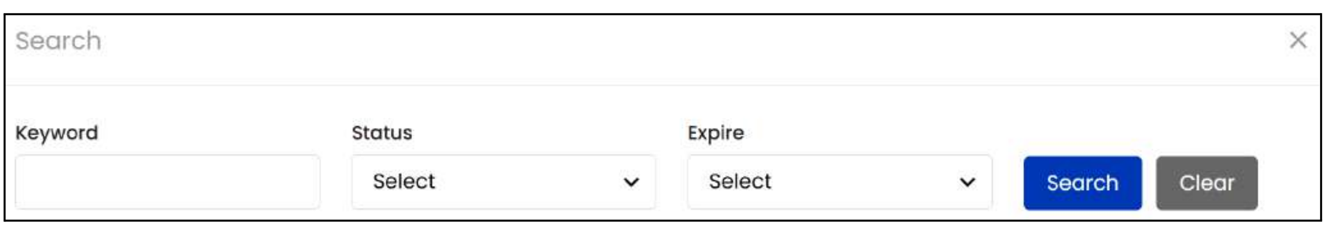
Alternatively, navigate back to the **Discount coupons** page by selecting the submodule from the navigation panel.

Search for a discount coupon

Use the search functionality at the top of the list to find a specific discount coupon.



Click the search bar or 🔍 to expand it. Click ✕ or the search bar again to collapse the section.



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An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

There are several filters that help narrow down the search. Each field is explained below:

- **Keyword:** Enter the discount coupon's title or code in this field to search for it.
- **Status:** Select the system status of the discount coupon from the dropdown list:
  - Active: Select this if the user's profile is active.
  - Inactive: Select this if the user's profile is inactive (applies to users whose accounts have been deactivated by you).
- **Expire:** Select the validity status of the discount coupon from the dropdown list:
  - Yes: Select this if the coupon has expired.
  - No: Select this if the coupon has not expired.

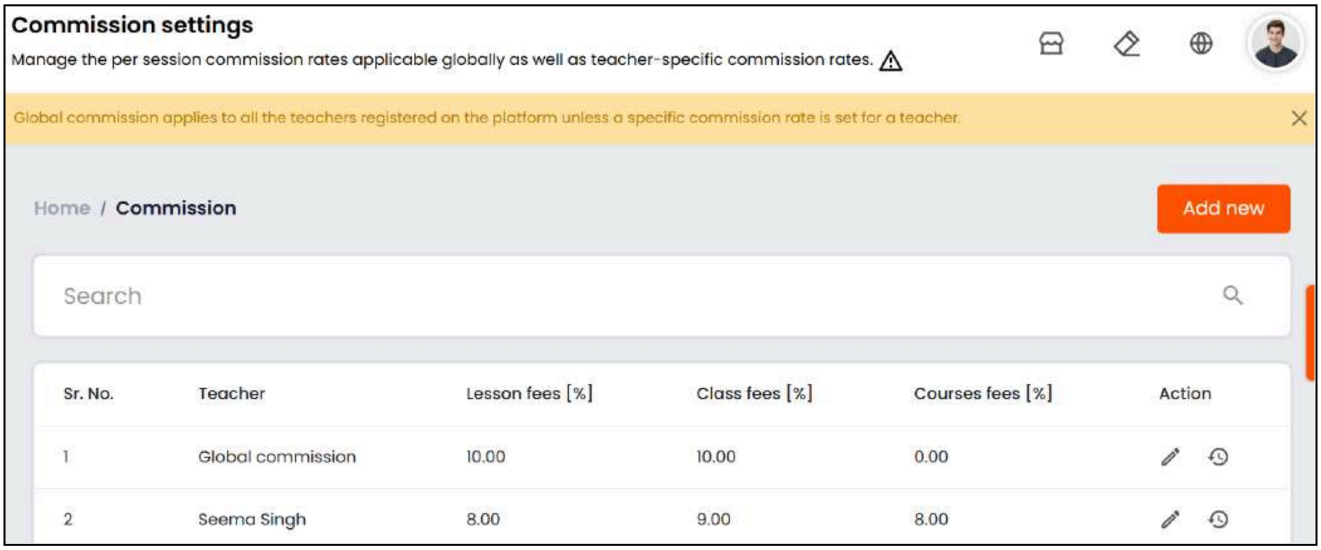
Search for a platform user by filling in a single field or multiple fields.

After filling in the desired fields, click **Search** to display the results. Click **Clear** to reset all fields and start a new search.

11.6 Commission settings

Set the commission rates that you will charge teachers for delivering services on the platform. This includes commissions on one-on-one lessons, group classes, and courses.

The commission settings help you manage how much revenue is collected from different types of teaching activities and individual teachers.



Types of commission profiles

There are two types of commission profiles on Yo!Coach:

1. Global commission profile

This is the default commission profile that applies to all teachers on the platform.

By default, the global commission is already listed on the page. You can update the commission rates defined in this profile, but you cannot delete it or assign it to a specific teacher.

It is always active and serves as a fallback whenever no teacher-specific settings are defined.

The global commission can be defined for

- **Lesson commission rate [%]** – applied to all one-on-one lessons.
- **Class commission rate [%]** – applied to all group classes.
- **Course commission rate [%]** – applied to all courses (if course functionality is enabled).

For example: If you set the global commission as 10% for every lesson, class, or course, all teachers will be charged 10% for every lesson, class, or course they offer—unless you define specific rates for each teacher on the platform.

2. Teacher-specific commission profile

This profile overrides the global profile and applies only to the selected teacher.

You can create as many teacher-specific profiles as needed, and each can have custom rates for:

- **Lesson commission rate [%]** – applied to all one-on-one lessons.
- **Class commission rate [%]** – applied to all group classes.
- **Course commission rate [%]** – applied to all courses (if course functionality is enabled).

Once created, the teacher-specific commission takes precedence over the global settings for that teacher.

For example: If the global commission is 10%, and you set up a profile for a teacher named Alice with 12% for lessons, 15% for classes, and 10% for courses, then Alice will be charged those custom rates.

All other teachers will continue with the global 10% commission.

*Course commission fields are only available when the course functionality is enabled in the system. You can manage this from **Settings > System configurations > System**.*

Manage the commissions list

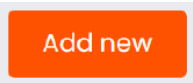
Each entry in the list includes the following details:

- **Sr. No.:** The serial number.
- **Teacher:** The name of the teacher whose commission profile is set.

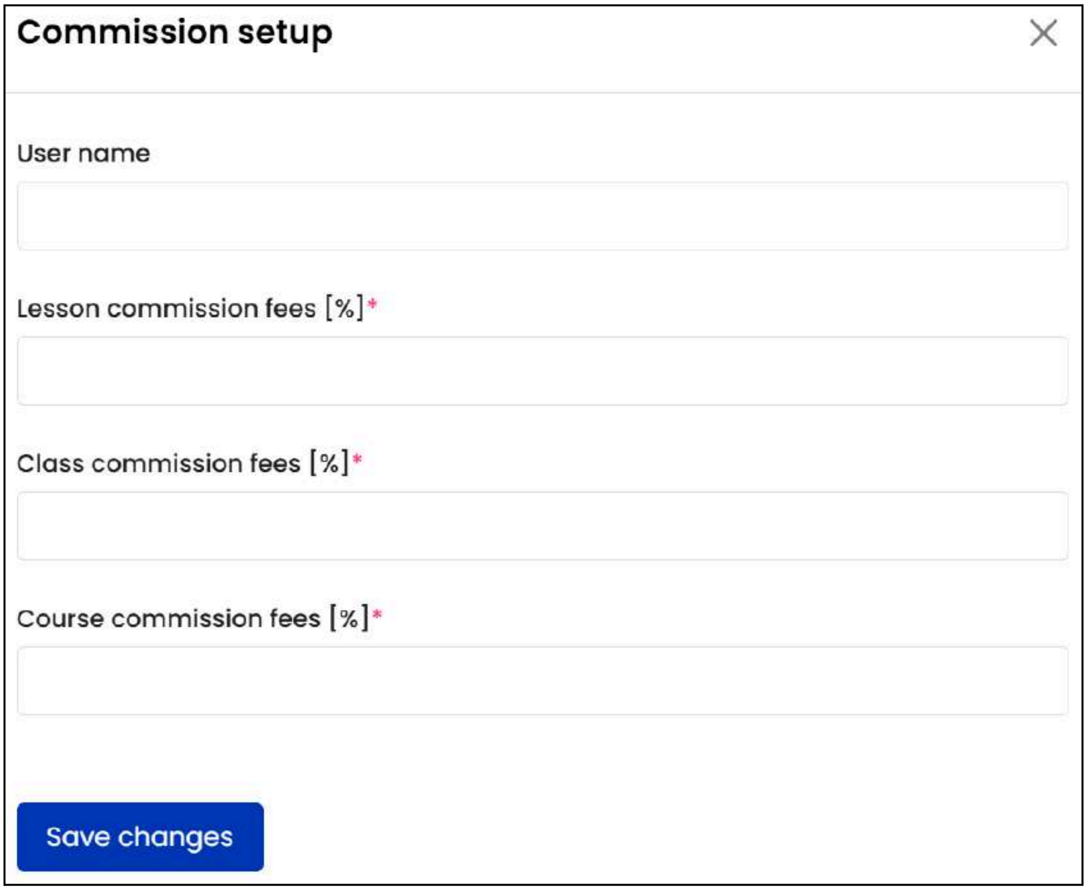
  The first entry in the list always refers to the global commission, and the name in this column will also appear as Global commission.
- **Lesson fees [%]:** The percentage of the lesson fee that will be charged as commission for the selected teacher.
- **Class fees [%]:** The percentage of the class fee that will be charged as commission for the selected teacher.
- **Courses fees [%]:** The percentage of the courses fee that will be charged as commission for the selected teacher.

  *This column is visible only when the course functionality is enabled in the system. You can manage this from **Settings > System configurations > System**.*

Add a commission profile

Click 

in the upper-right corner of the page to open the **Commission setup** form.



Update the following:

- **User name:** Enter the teacher's name in this field. Place the cursor in the field and start typing. As you type, a list of matching results will appear.

Select the applicable option.

- **Lesson commission fee [%]*:** Enter the percentage of the lesson fee that will be charged as commission for the selected teacher.

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- **Class commission fee [%]*:** Enter the percentage of the class fee that will be charged as commission for the selected teacher.
- **Course commission fee [%]*:** Enter the percentage of the course fee that will be charged as commission for the selected teacher.

  *This field is visible only when the course functionality is enabled in the system. You can manage this from **Settings > System configurations > [System](#)**.*

Once done, click **Save changes**.

You can add or edit commission profiles in the list, but you cannot delete or deactivate them. Add them carefully.

Action buttons

Under the **Action** column, each entry includes three action buttons, allowing you to perform specific actions.

The functions of each button are explained in detail below:

i. Edit

Click this to edit the commission profile details.

The [Commission setup](#) form will appear.

Update the fields, then click **Save changes**. To close the form, click in the upper-right corner.

ii. History

Click this to view the edit history of the commission record.

You will be directed to a page that lists all instances of changes made to the record since its creation.

The list shows the most recent change, while the bottom displays the initial change made when the commission was created.

This format allows for an easy review of changes over time.

Each change is accompanied by a date and timestamp, enabling proper tracking of modifications.

After reviewing the information, go back to the **Commission settings** page by clicking **Commissions** in the breadcrumbs at the top of this page.

Alternatively, navigate back to the **Commission settings** page by selecting the submodule from the navigation panel.

Search for a commission profile

Use the search functionality at the top of the list to find a specific commission.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

Click the search bar or to expand it. Click or the search bar again to collapse the section.

Enter the teacher name whose commission profile you are searching for, or global commission in the **keyword** field and click **Search** to get the results.

Click **Clear** to reset the field and start a new search.

11.7 Currency management

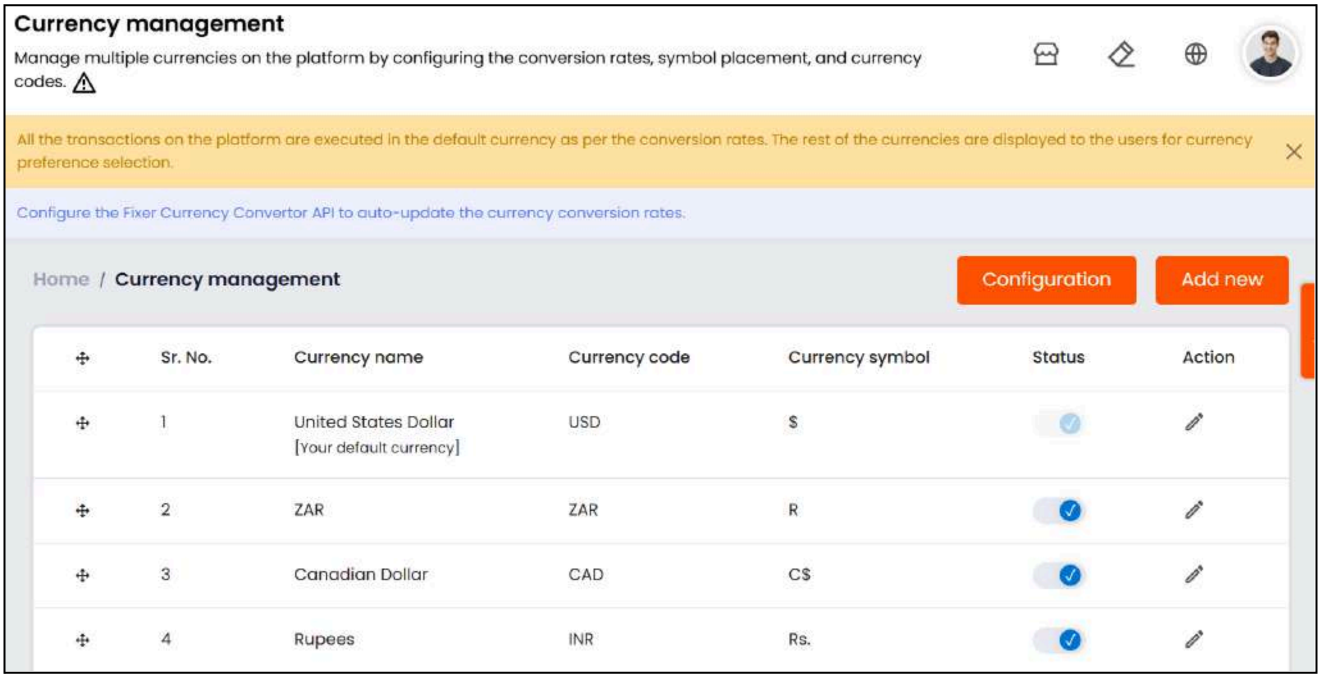
Set up and manage various currency types on the platform from this submodule. You can configure conversion rates, symbol placements, and currency codes based on your business requirements.

During the initial setup, the platform displays one or two currencies by default. One of these is selected as the **default currency**—the currency in which all transactions are processed. This currency is defined during system setup in coordination with the development team. It cannot be changed or deactivated by the administrator.

You can add additional currencies to improve the user experience by allowing users to view prices in their preferred currency.

For each added currency, the system calculates its value relative to the default currency. You can manage these conversion values in one of the following ways:

- Set and update conversion values manually.
- Use the Fixer currency converter API to update conversion values automatically every 12 hours using real-time foreign exchange rates.



DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

Points to note

- The default currency in this submodule refers to the system's transaction currency. All transactions on the platform are processed in this currency.

  The transaction currency cannot be changed or deactivated by the administrator. To change this, connect with the FATbit support team.

- The display currency, also referred to as the default site currency, is configured under **Settings > System configurations >** General. This currency is used only to display prices on the platform and may differ from the transaction currency.

- **The transaction currency and the display currency are managed separately and serve different purposes.**

  For example, if the transaction currency is USD and the display currency is INR, all transactions will still take place in USD, but users will see prices in INR.

- The Fixer API is used only to update display prices based on live conversion rates. It does not affect how transactions are processed.

Manage the currencies list

Each entry in the list includes the following details and provides options for management including:

- **Drag-and-drop :** Click this next to a currency to move it up or down the list, and the serial numbers will automatically update to reflect the new sequence.

  The currency will appear in the same order in all currency lists on the platform.

- **Sr. No.:** The serial number.

- **Currency name:** The name of the currency.

- **Currency code:** The respective currency code.

- **Currency symbol:** The symbol of the currency.

- **Status:** Turn **on** the toggle switch beside the currency to activate it.

  Leave this **off** or turn it **off** to deactivate the currency. It will no longer appear anywhere on the platform.

  A warning dialog box will appear for both actions, asking if you want to update the status or not. Click **OK** to delete it or **Cancel** to abort the action.

Add a currency

Click Add new in the upper-right corner of the page to open the **Currency setup** form.

This form contains multiple tabs: the [General](#) tab, followed by the [Primary language](#) tab. After that, you'll find the [Secondary language](#) tabs, corresponding to the languages available on your platform. Let's start with the **General tab.**

General tab

Update the following:

- **Currency code*:** Select the currency code from the dropdown list of options, which will include all the available currency codes in the world.

<u>**DISCLAIMER:**</u> The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

A currency code is the alphabetical designation for the currency. For example, the code for the United States Dollar is USD.

- **Currency symbol*:** Enter the currency symbol that appears before or after the amount (numerical digits), if applicable.

The next four settings control only how currency values are visually grouped on the platform. It does not affect calculations, stored data, or transaction values.

- **Positive format*:** Click the field and choose from the options of how and where the currency symbol should appear in relation to the amount when displaying positive values (e.g., $6.66).

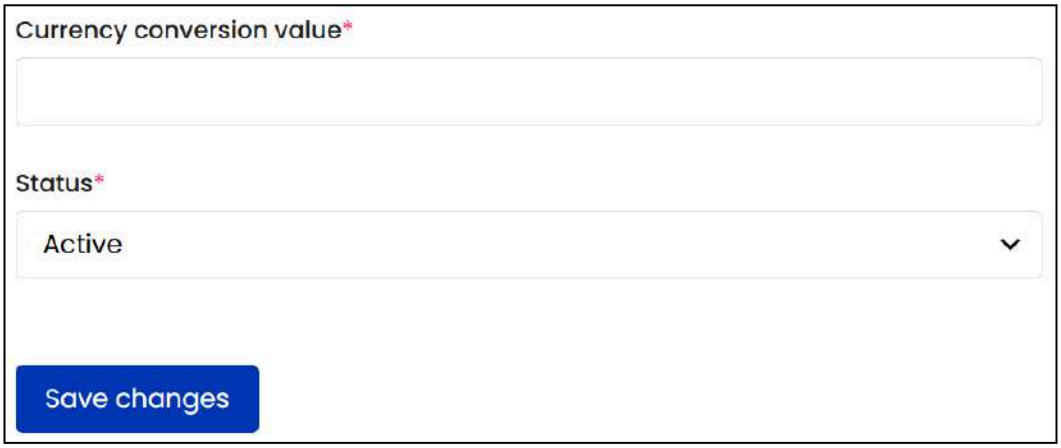
- **Negative format*:** Click the field and choose from the options of how and where the currency symbol should appear in relation to the amount when displaying negative values (e.g., -$6.66).

- **Decimal symbol*:** Click the field and choose the symbol to use as the decimal separator in prices and amounts displayed across the platform.

  For example, choose a period (.) for formats like 10.50 or a comma (,) for formats like 10,50.

- **Grouping symbol*:** Click the field and choose the symbol to use for separating large currency values into readable groups.

  For example, choose a comma (,) for formats like 1,000 or a space for formats like 1 000.



- **Currency conversion value*:** Enter the conversion rate for this currency, using the system's transaction currency as the base.

  By default, the value of the transaction currency is treated as 1 unit, and all other currency conversions are calculated relative to this.

  For example, if the transaction currency is USD and you enter 82.5 for another currency, it means 1 USD = 82.5 units of the selected currency.

  When the currency conversion API is active, this value is updated automatically based on real-time exchange rates. However, you can manually override the value if required.

- **Status*:** Select the status of the currency.

  Click the field and select "**Active**" to publish it on the platform. Select "**Inactive**" to temporarily hide the currency from the platform.

Once done, click **Save changes**.

This will direct you to the next tab, which is the primary language tab (English tab).

English tab

This is the primary language tab, and completing this tab is mandatory for publishing the currency on the platform.

Since English is set as the primary language, this tab is labeled **English**.

Update the following:

- **Currency name*:** Enter the currency name in the primary language. This name will be displayed in all applicable lists on the platform.
- **Auto-translate into other languages:** Check mark this to automatically update the secondary language(s) data. The data in the subsequent language tab(s) will be auto-filled.

  *This feature is available only if the [Microsoft text translator API](#) is configured under **Settings > System configurations >** [Third-party APIs](#).*

  If you prefer to manually fill in the secondary language(s) data, leave the checkbox unselected.

Once done, click **Save changes**. The next tab(s) will be the secondary language tab(s) (Arabic, Spanish, etc.), which include the same fields as the English tab.

*If you had selected the auto-translate option, the secondary language tab(s) will be prefilled. Review the data, make any necessary edits, click **Save changes**, and close the form.*

*If you did not use the auto-translate feature earlier, use the **Auto-translate & fill language data** button beside the **Save changes** button on each secondary language tab to auto-fill the secondary language fields. Then, click **Save changes**, and move to the next tab, or close the form.*

*If you do not want to fill the secondary language tab(s) at this time, complete only the primary language tab (English tab), click **Save changes**, and close the form.*

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

After updating all necessary fields, click ✕ in the upper-right corner of the form.

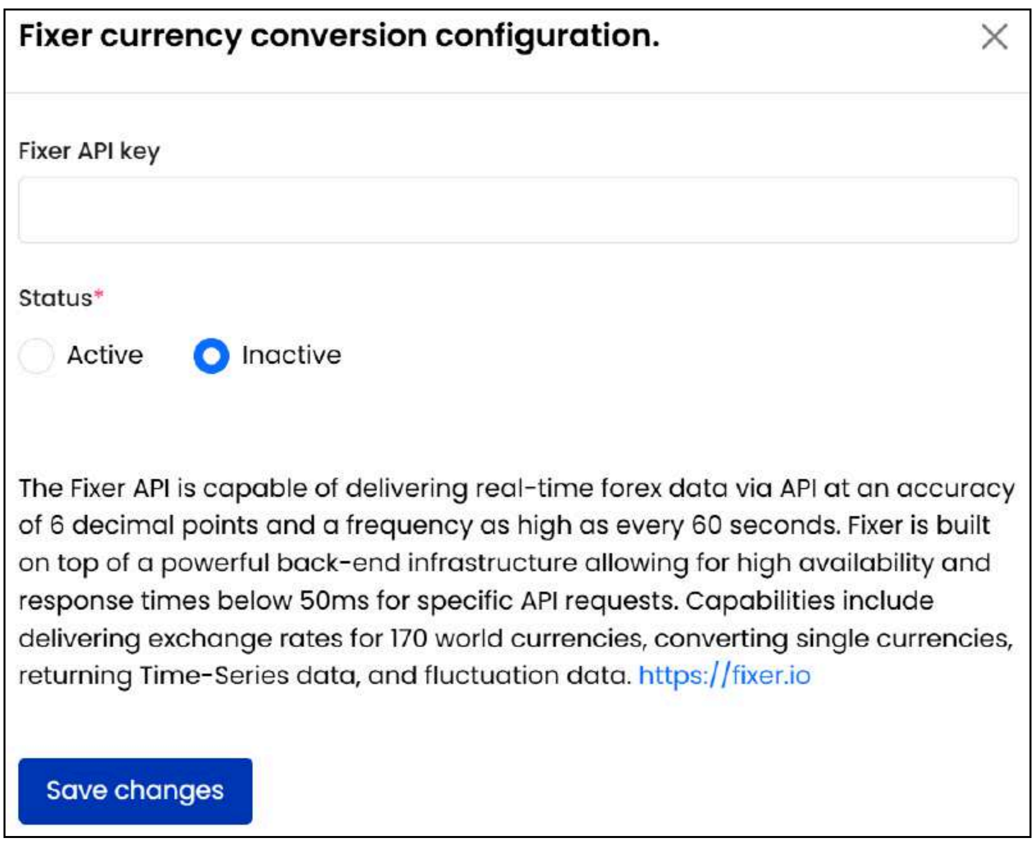
Action button

There is a single action button next to each entry—**Edit** ✎.Click this to edit the currency's details. The [Currency setup](#) form will appear.

Update the fields, then click **Save changes**. To close the form, click ✕ in the upper-right corner.

Configuration & Sync buttons

Click Configuration in the upper-right corner of the page (beside Add new) to open the **Fixer currency conversion configuration** form.



<u>**DISCLAIMER:**</u> The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

The Fixer currency converter API is a third-party service used for obtaining real-time and historical foreign exchange rates. It provides currency conversion data based on official rates, typically sourced from central banks and financial institutions.

Follow the steps shared on - **[Yo!Coach- Fixer Keys Setup Guide]** to generate the configuration keys. Then, enter the keys in the provided form:

- **Fixer API Key:** Enter the relevant API key.
- **Status*:** Select the status of the API from the following options:
    - **Active:** Select this to activate the Fixer API. The currencies added in the system are synchronized through the API only when it is active.
    - **Inactive:** Select this to deactivate the Fixer API. When inactive, you must manually update the conversion values for each system-active currency.

Click **Save changes** to apply the settings, and the form will close automatically.

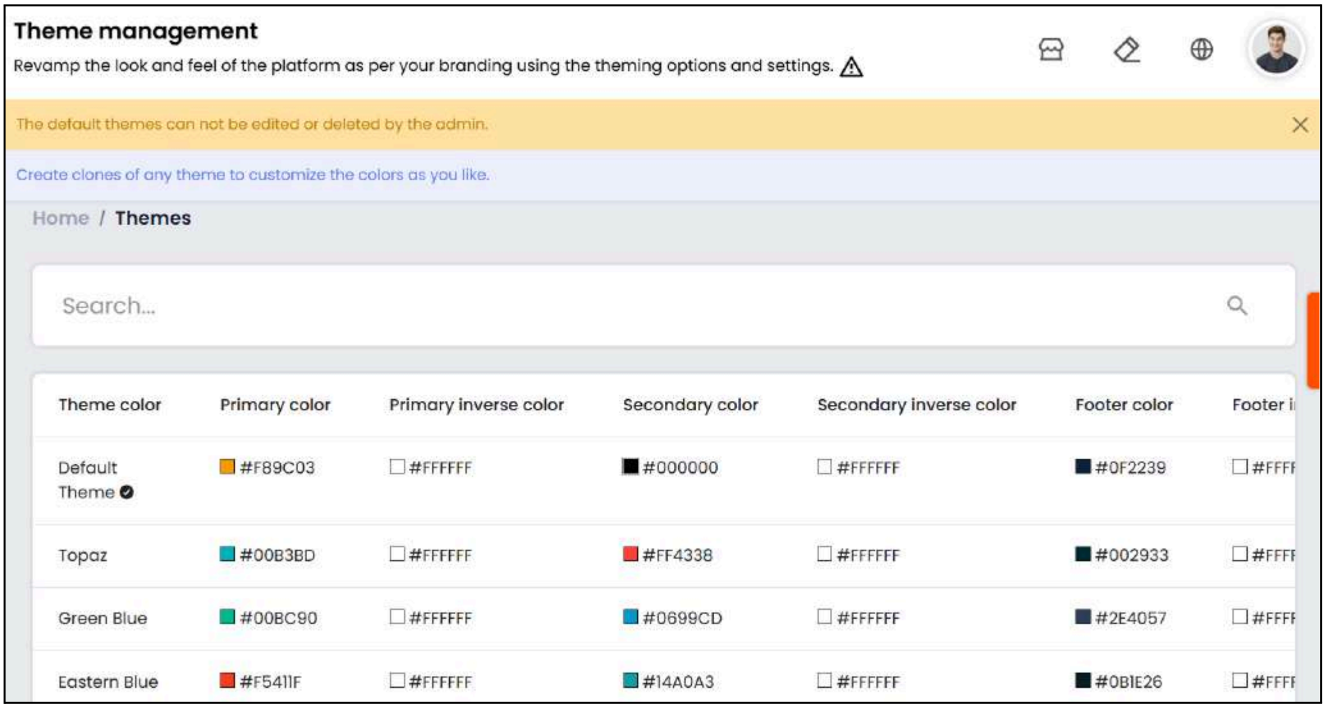
Once this becomes active, another button appears beside it—**Sync**. The Fixer API automatically updates currency conversion rates based on real-time data from the foreign exchange market. These rates apply to all currencies that are active in the system. However, if needed, you can also sync the rates manually using this button.

Click **Sync** to update the currency conversion rates manually. The date and time of the last sync are displayed to the left of the button.

! *The **Sync** button is not visible if the currency conversion API is inactive.*

11.8 Theme management

Themes dictate the overall design and appearance of the site, including how content is displayed. Manage and set the theme of the platform via this submodule.



The **default theme** is shown first in the list. Any changes made to the theme settings apply across the entire online store. As a system rule, all themes can be customized using the available options, but default themes cannot be edited or deleted.

Manage the themes list

The list displays the following information:

- **Theme color:** The name of the theme color.

  By default, the first theme in the list is named "Default theme" and is provided by the system. You can edit its details as required.

  The currently active theme on the platform is marked with beside its name.

- **Primary color:** Displays the primary color in a box, along with its HEX code.
- **Primary inverse color:** Displays the primary inverse color in a box, along with its HEX code.
- **Secondary color:** Displays the secondary color in a box, along with its HEX code.
- **Secondary inverse color:** Displays the secondary inverse color in a box, along with its HEX code.
- **Footer color:** Displays the platform's footer color in a box, along with its HEX code.
- **Footer inverse color:** Displays the platform's footer inverse color in a box, along with its HEX code.

Action buttons

Under the **Action** column, each entry displays two or three buttons, depending on the type of theme.

The first entry in the list is the only one that includes [Edit](#) and [Delete](#) buttons. In addition to these, it also displays three common action buttons available for all other themes: [Clone](#), [Preview](#), and [Click to activate](#).

However, the theme that is currently active—whether it is the first (default) theme or any other—will not display the Click to Activate button.

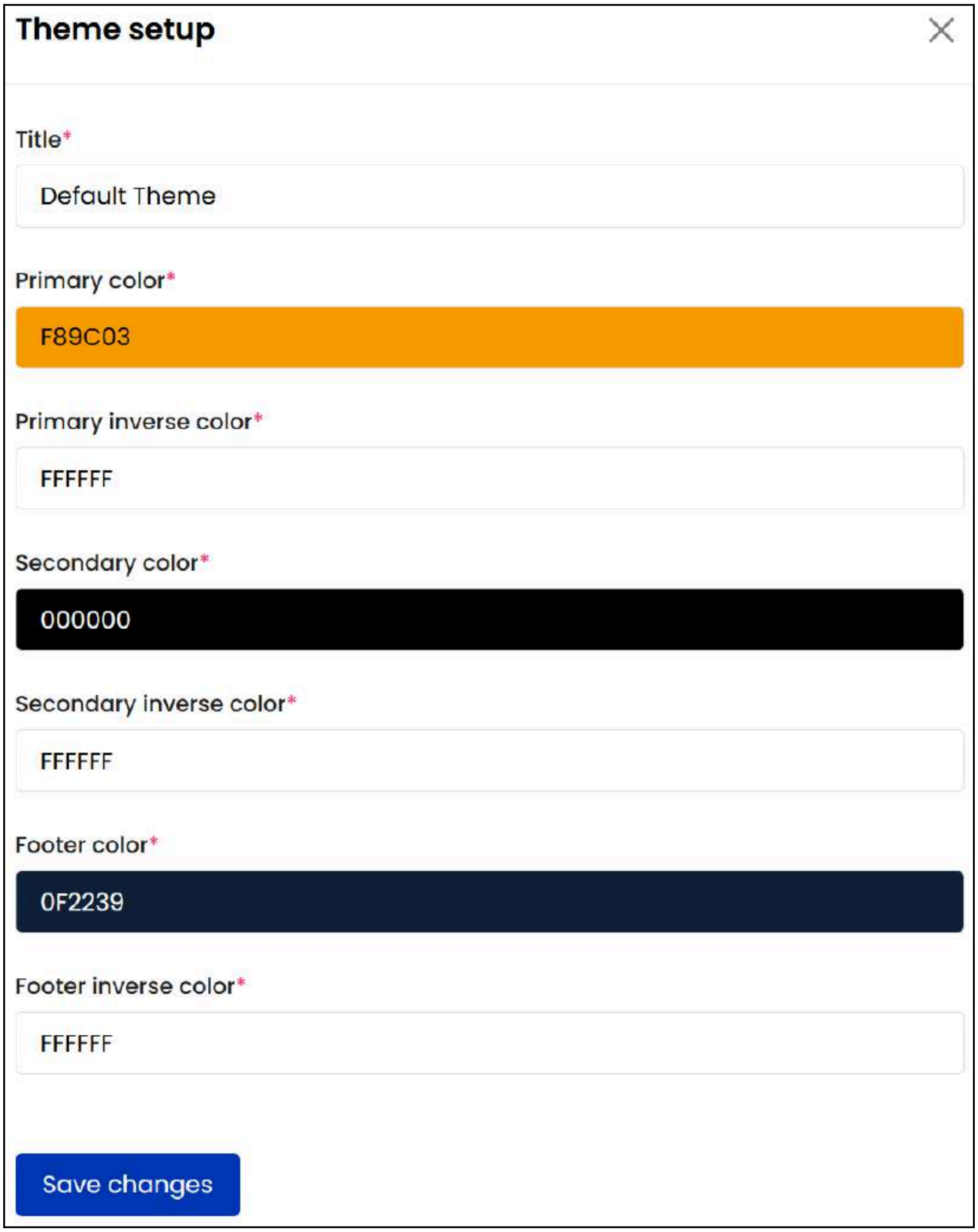
The function of each button is described in detail below.

i. Edit

This button is visible only for the default theme on the platform, which is listed as the first one in the list.

Click this to edit the theme details.

The **Theme setup** form will appear.



Update the following:

- **Title*:** Displays the original theme's name. Edit the name as per your requirements.
- **Primary color*:** Click the color code field to open the **Color palette** and select the color accordingly. You can also enter the color's HEX code in the field, press Enter and it will be added accordingly.

- **Primary inverse color*:** Click the color code field to select an inverse color. For example, if the primary color is black, the inverse has to be a color the black can be seen on, like white. The inverse color is majorly used for text on the platform.
- **Secondary color*:** Click the field and choose the secondary color.
- **Secondary inverse color*:** Click the field and select the inverse version of the secondary color.
- **Footer color*:** Click the field and choose a footer background color.
- **Footer inverse color*:** Click the field and select the inverse footer text color.

Once done, click **Save changes**.

To cancel the process and close the form, click ✕.

ii. Delete

This button is visible only for the default theme on the platform, which is listed as the first one in the list.

Click this to delete the theme from the system. A confirmation message will appear.

Click **OK** to confirm the action or **Cancel** to abort it.

If the theme is active, it cannot be deleted. If you try to delete it, an error message will appear.

iii. Clone

Click this to clone the theme.

The Theme setup form will appear with prefilled fields. Edit them accordingly and click **Save changes** to update the new theme.

iv. Preview

Click this to view any non-active theme in a new tab.

This option allows you to see how the theme looks without affecting the live site.

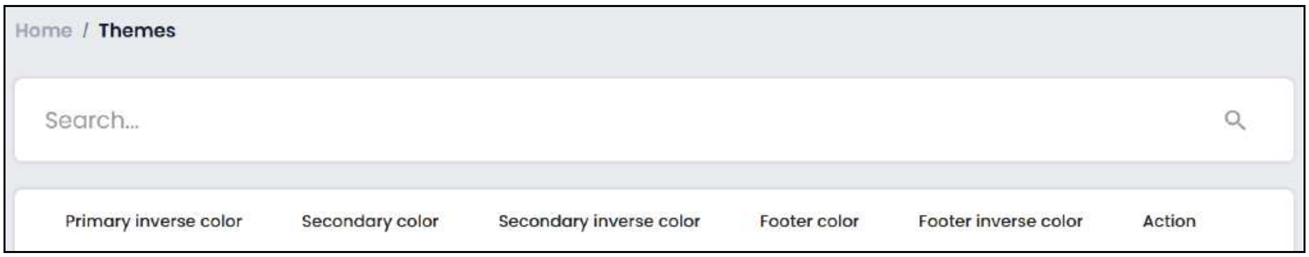
v. Click to activate

Click this to activate the respective theme. A confirmation message will appear.

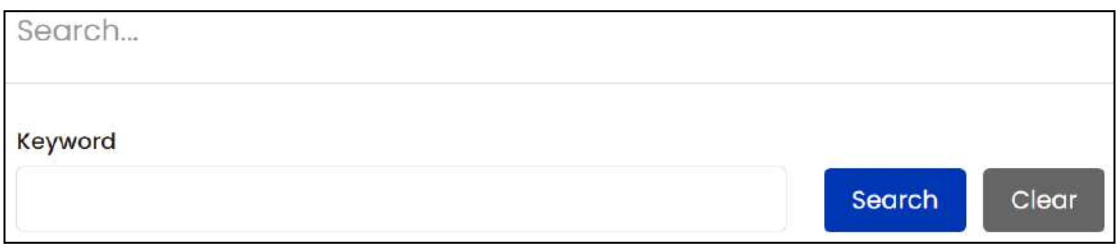
Click **OK** to confirm the action or **Cancel** to abort it.

Search for a theme

Use the search functionality at the top of the list to find a specific theme.



Click the search bar or to expand it. Click or the search bar again to collapse the section.



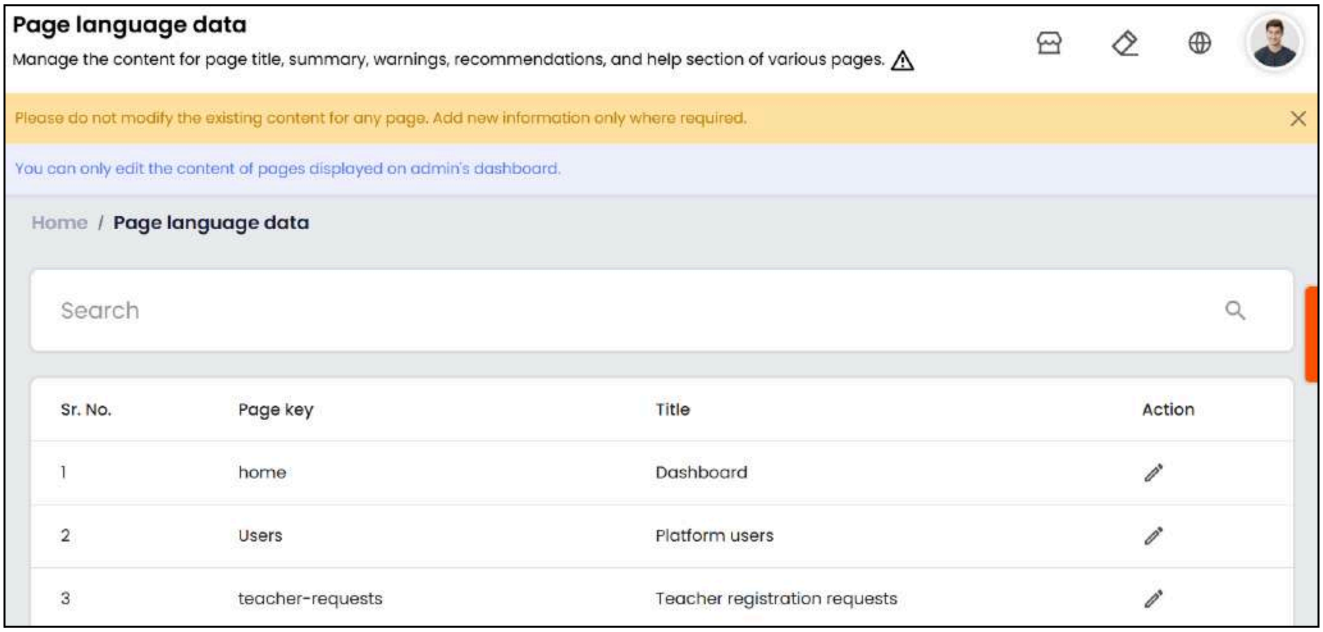
Enter the theme name in the **keyword** field and click **Search** to get the results.

Click **Clear** to reset the field and start a new search.

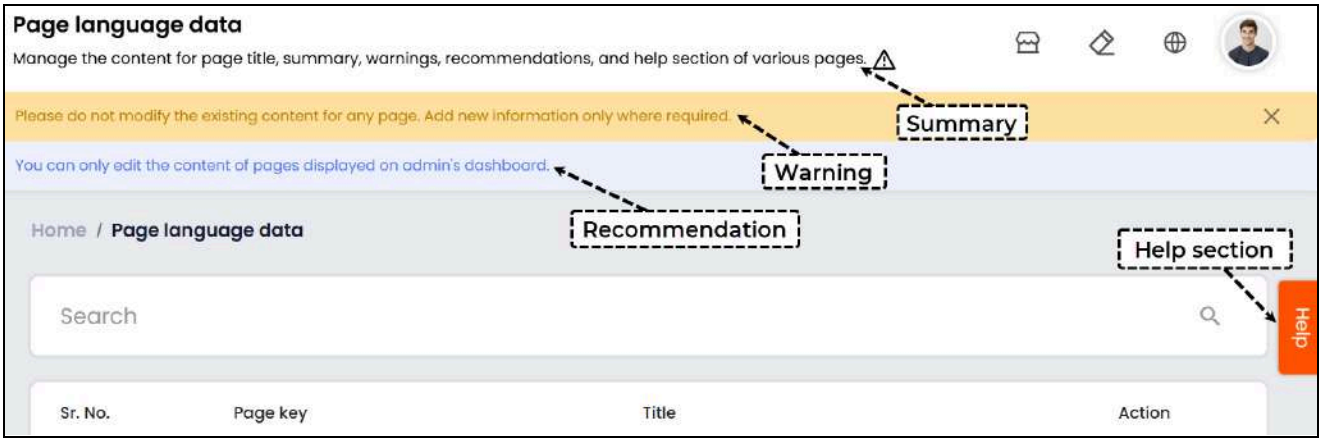
DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

11.9 Page language data

Update and manage the page title, summary, warning, recommendation and help content for all the pages available on the admin's panel (only) under this submodule.



These sections help you (or the sub-user) navigate through a module and perform the needed actions properly.



Manage the page language data list

The list displays the following information:

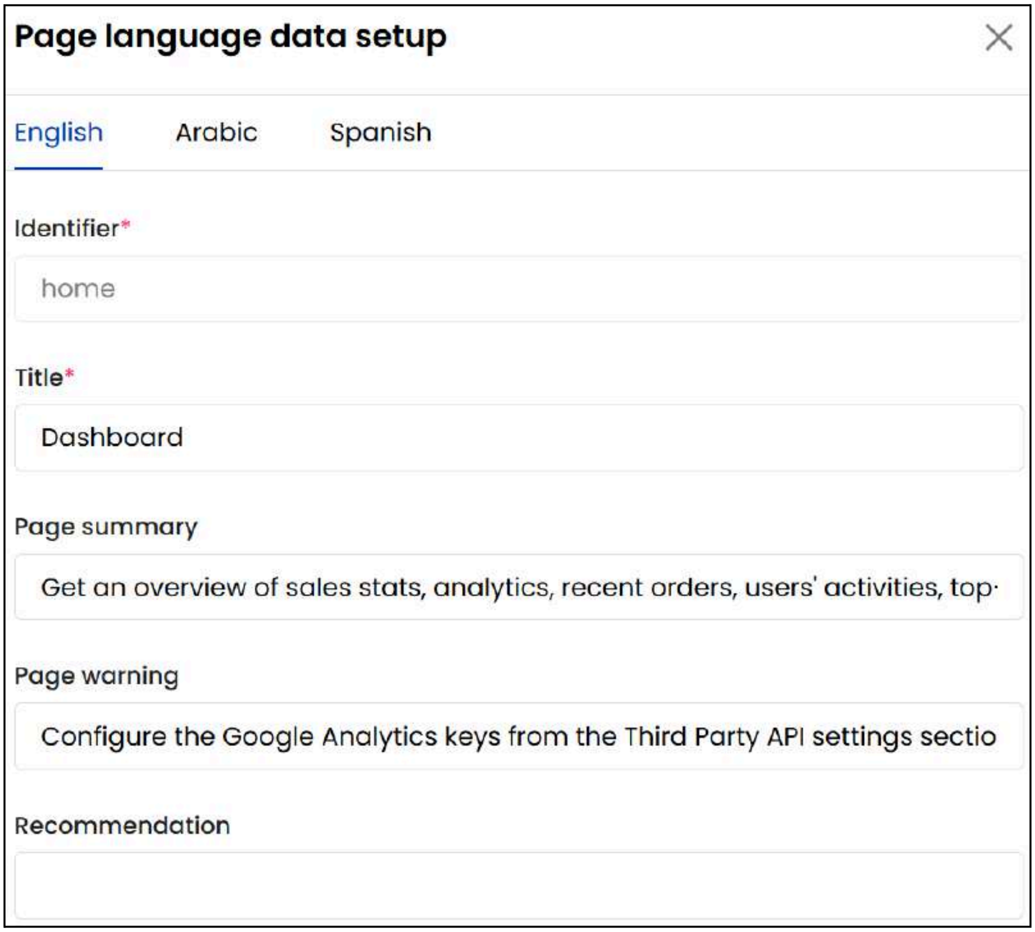
DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

- **Sr. No.:** The serial number
- **Page key:** The page's key (also called system identifier in programmer's language) and is used at the backend.
- **Title:** The title of the page.

Action button

There is a single action button next to each entry—**Edit** . Click this to edit the page's details. The **Page language data setup** form will appear.

Although you can edit the page title, summary and so on, avoid doing it, until and unless absolutely necessary. Unnecessarily editing the text can cause confusion for you later on, if the wrong information is added.

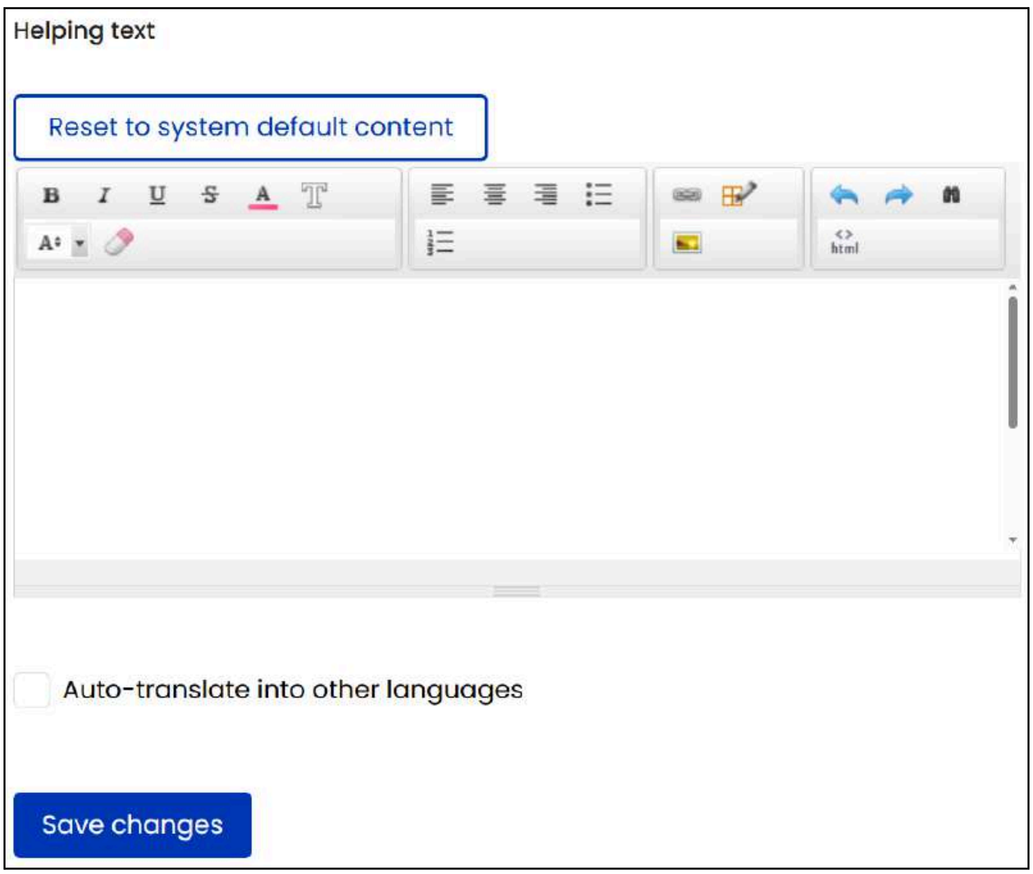


Update the following:

- **Identifier:** This is the page's system identifier, used to save data in the system and not displayed anywhere on the platform.
- **Title*:** Edit the page title according to your requirements. The page title is displayed at the top of the page.
- **Page summary:** Edit/enter a page summary that is displayed below the page title. This section is to explain what the page (module or submodule) is about and what actions can be taken under it.

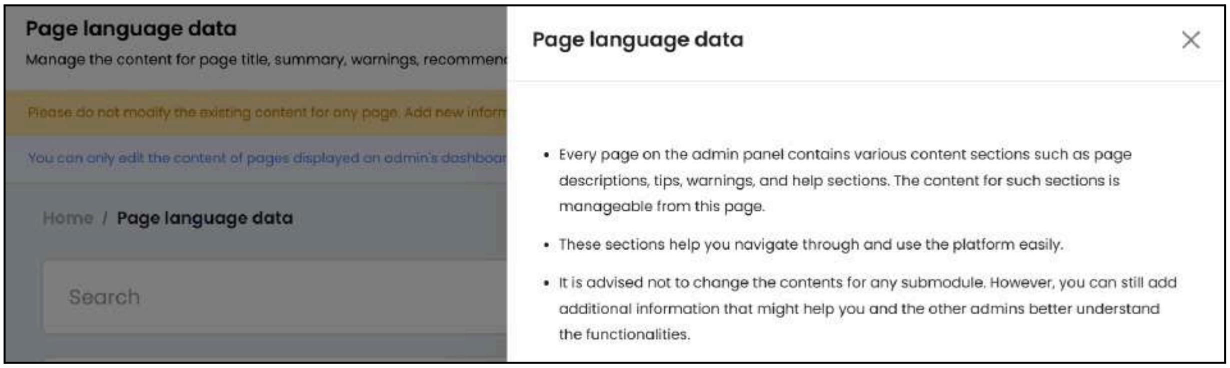
  A warning sign is displayed at the end of the message only when there is a warning message below this for the page.
- **Page warning:** Edit/enter the warning message that is displayed below the summary of the page. This message is given on a yellow colored belt.

  Close this section by clicking at the end of the warning belt.
- **Recommendation:** Edit/enter the recommendation text that is displayed below the page summary. This message is given on a blue colored belt and has a bulb (tips/suggestion) sign displayed at the beginning of the message.



- **Helping text:** Edit/enter the help section's content and format it according to your taste using the content editor. This content is displayed on the right side of the page under the **Help drawer**.

  Clicking **Help** will open the **Help drawer**, which displays the help content for the respective page.



After filling all the information, click **Save changes**. Then, click ✕ to close the form.

Search for a page

Use the search functionality at the top of the list to find a specific page.

Click the search bar or 🔍 to expand it. Click ✕ or the search bar again to collapse the section.

Enter the page name in the **keyword** field and click **Search** to get the results.

Click **Clear search** to reset the field and start a new search.

11.10 Learner subscription plans

*This feature is available only if the subscription setting is enabled under **Settings > System configurations >** [System](#).*

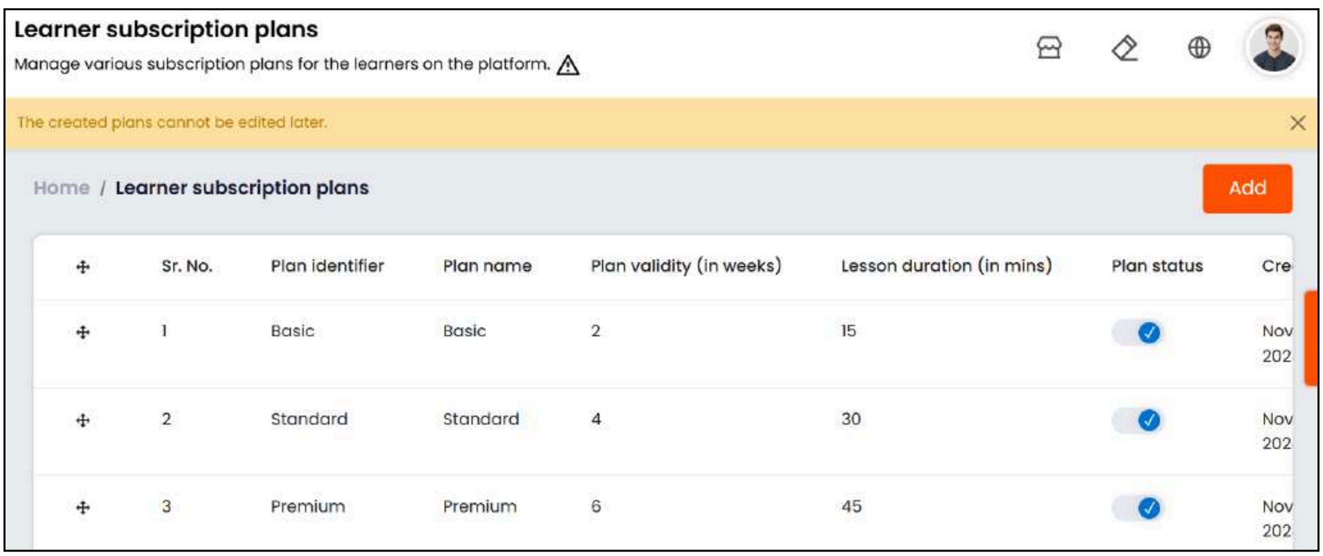
Learners can purchase a subscription plan that offers a fixed number of lessons with a specific duration and validity period.

For example, a Basic plan may include 10 lessons of 15 minutes each, valid for 2 weeks. The lesson count and duration are defined by the selected plan.

After purchasing a subscription plan, learners can book any combination of subjects and teachers until all lessons are used or the plan expires. Once the plan ends or renews, unused lessons become invalid, and a new lesson count (if applicable) is applied based on the updated plan.

*For a detailed example, including how lesson orders are created when booking from a subscription, refer to the **Orders >** [Subscription plan orders](#) section.*

Manage all the learner subscription plans under this submodule.



The list will be empty if you just bought the platform and didn't choose to have dummy content provided by FATbit during the platform installation.

<u>**DISCLAIMER:**</u> The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

Manage the learner subscription plans list

Each entry in the list includes the following details and provides options for management including:

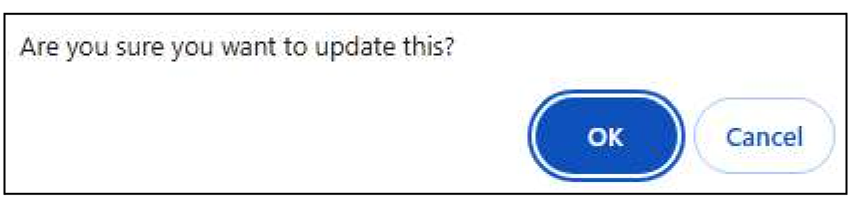
- **Drag-and-drop :** Click this next to a plan to move it up or down the list, and the serial numbers will automatically update to reflect the new sequence.

  The plans will appear in the same order across all applicable lists, including the list where the learner can select the plan they want to purchase.

- **Sr. No:** The serial number.
- **Plan identifier:** This is the plan's system identifier, used to save data in the system and not displayed anywhere on the platform.
- **Plan name:** The plan name displayed throughout the platform and in the relevant lists.
- **Plan validity (in weeks):** Duration of the subscription plan, measured in weeks.
- **Lesson duration (in mins):** Duration of each lesson that the learner can book under the respective subscription plan.
- **Status:** Edit the status (activate or deactivate) of a plan as per your requirements using the toggle switch beside it, under the status column.

  Turn **on** the toggle switch beside the plan to activate it. Leave this **off** or turn it **off** to deactivate the plan.

  A warning dialog box will appear for both actions, asking if you want to update the status or not.

  Click **Ok** to delete it or **Cancel** to abort the action.

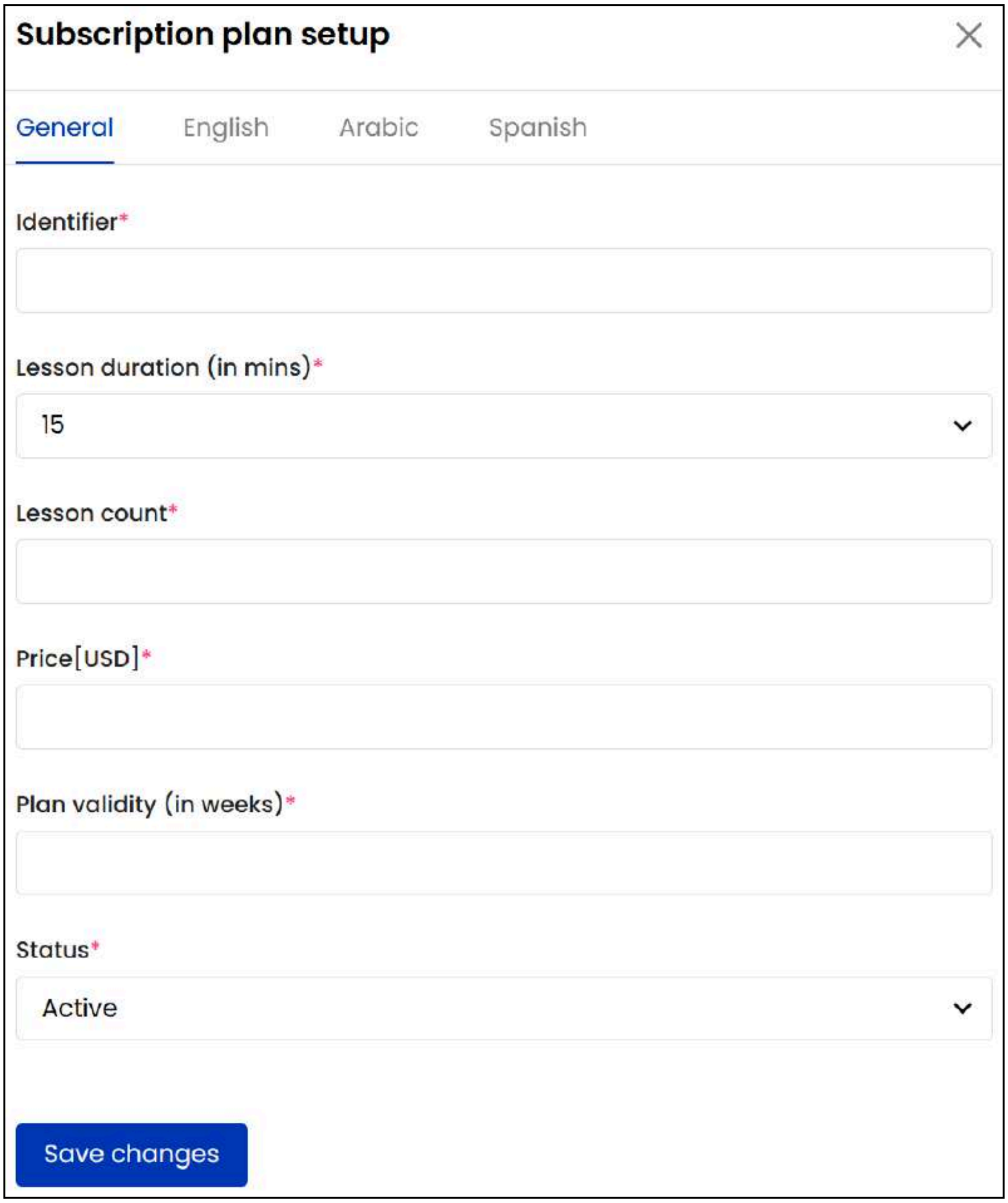
- **Created on:** Date and time when the subscription plan was created.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

Add a subscription plan

Click 

in the upper-right corner of the page to open the **Subscription plan setup** form.



This form contains multiple tabs: the [General]() tab, followed by the [Primary language]() tab. After that, you'll find the [Secondary language]() tabs, corresponding to the languages available on your platform.

Let’s start with the **General tab**.

<u>**DISCLAIMER:**</u> The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

General tab

Update the following:

- **Identifier*:** Enter a unique plan identifier. It can match the plan name, as defined under the Language data tabs (e.g., English, Arabic, Spanish).

  The identifier is used to save data in the system and will not be displayed anywhere on the platform. Ensure the identifier is unique; otherwise, an error message will appear.

- **Lesson duration (in mins)*:** Select the allowed duration, in minutes, for each lesson included in the subscription plan.
- **Lesson count*:** Enter the total number of lessons included in the subscription plan.
- **Price [default currency]*:** Enter the price of the subscription plan in the platform's default currency.
- **Plan validity (in weeks)*:** Enter the number of weeks the subscription plan will remain valid.
- **Status:** Click the field and select the platform status of the plan.

  Select "**Active**" to publish it on the platform. Select "**Inactive**" to temporarily hide the plan. This is a good option especially since you cannot delete a plan.

Once done, click **Save changes**.

This will direct you to the next tab, which is the primary language tab (English tab).

English tab

This is the primary language tab, and completing this tab is mandatory for publishing the plan on the platform.

Since English is set as the primary language, this tab is labeled **English.**

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

Update the following:

- **Plan name*:** Enter the plan name in the primary language. This name will be displayed in the applicable lists on the platform.
- **Auto-translate into other languages:** Check mark this to automatically update the secondary language(s) data. The data in the subsequent language tab(s) will be auto-filled.

  This feature is available only if the [Microsoft translator API](#) is configured under ***Settings > System configurations >*** ***[Third-party APIs](#)***.

  If you prefer to manually fill in the secondary language(s) data, leave the checkbox unselected.

Once done, click **Save changes**.

The next tab(s) will be the secondary language tab(s) (Arabic, Spanish, etc.), which include the same fields as the English tab.

*If you had selected the auto-translate option, the secondary language tab(s) will be prefilled. Review the data, make any necessary edits, click **Save changes**, and close the form.*

*If you did not use the auto-translate feature earlier, use the **Auto-translate & fill language data** button beside the **Save changes** button on each secondary language tab to auto-fill the secondary language fields. Then, click **Save changes**, and move to the next tab, or close the form.*

*If you do not want to fill the secondary language tab(s) at this time, complete only the primary language tab (English tab), click **Save changes**, and close the form.*

After updating all necessary fields, click in the upper-right corner of the form.

Action buttons

Under the **Action** column, each entry displays one or two buttons, depending on its status.

All plans in the list have a [View](#) button.

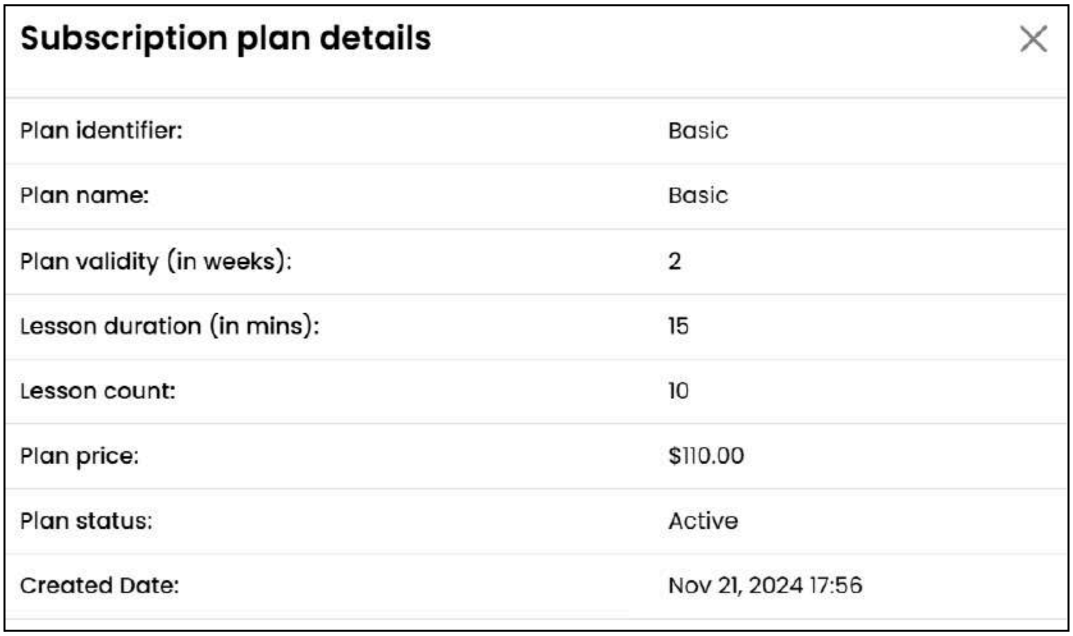
Plans that are not currently active for any learner—that is, not purchased during the current period—also display an [Edit](#) button.

If a plan is already in use by any learner, it cannot be edited. In such cases, you can only deactivate the plan to prevent learners from purchasing it again after their current plan period ends.

The function of each button is described in detail below.

i. View

Click the button beside a plan to review the details. A drawer will appear, displaying the **Subscription plan details.**



Subscription plan details

Plan identifier:	Basic
Plan name:	Basic
Plan validity (in weeks):	2
Lesson duration (in mins):	15
Lesson count:	10
Plan price:	$110.00
Plan status:	Active
Created Date:	Nov 21, 2024 17:56

The details included are:

- **Plan identifier:** Internal name or unique label used to identify the plan in the system.
- **Plan name:** Display name of the subscription plan shown to learners.
- **Plan validity (in weeks):** Duration for which the plan remains active after purchase.
- **Lesson duration (in mins):** Allowed duration (in minutes) for each lesson in the plan.
- **Lesson count:** Total number of lessons included in the plan.
- **Plan price:** Cost of the plan, shown in the platform's default currency.
- **Plan status:** Current status of the plan (e.g., Active, Inactive).
- **Created date:** Date and time when the plan was created in the system.

After reviewing the details, click ✕ to close the drawer.

ii. Edit

This button is visible only for plans that are not currently active for any learner.

Click this to edit the plan's details. The Subscription plan setup form will appear.

Update the fields, then click **Save changes**.

To close the form, click ✕ in the upper-right corner.

11.11 Affiliate commission

Set and manage the commission that affiliate users earn when their referred buyers purchase courses, lessons, or classes on the platform. A defined percentage of the purchase amount, as specified in this module, is paid to the affiliate.

Points to note

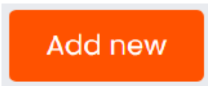
- The default affiliate commission is always displayed as the first entry in the list.
- You can edit the default affiliate commission rate, but you cannot delete it or add additional conditions to it.
- The default commission is applied when no specific commission rate is defined for an affiliate.
- You can create specific commission rates for individual affiliates, which override the default commission.
- If both a default and an affiliate-specific commission exist, only the affiliate-specific rate is applied.
- For example, if the default commission is 10% and a 5% rate is set for affiliate Roby, Roby will earn 5% for each qualifying purchase made through his referral.

Manage the affiliate commission list

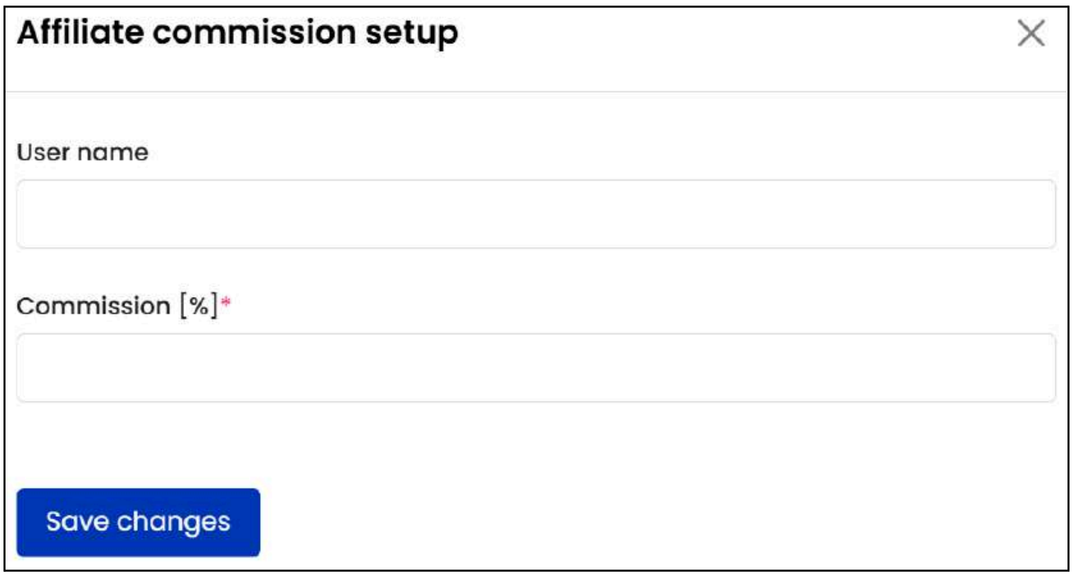
The list displays the following information:

- **Sr. No.:** The serial number
- **Affiliate:** The name of the commission or the affiliate whose specific commission has been set.
- **Commission [%]:** The commission fee percentage value.

Add an affiliate-specific commission rate

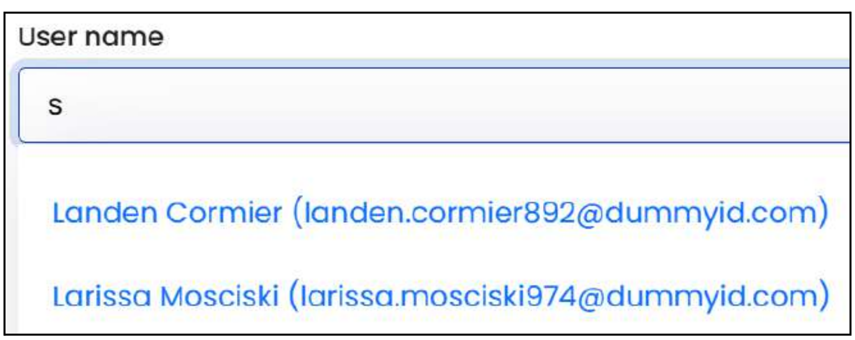
Click 

in the upper-right corner of the page to open the **Affiliate commission setup** form.



Update the following:

- **User name:** Enter the affiliate name in this field. Place the cursor in the field and start typing. As you type, a list of matching results will appear—select the applicable option.



DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

- **Commission [%]*:** Enter the affiliate commission fee as a percentage. For example, entering 5 applies a 5% commission on the sale amount.

Once done, click **Save changes**.

Action buttons

Under the **Action** column, each entry includes three buttons that allow you to perform different actions. The default commission entry includes only two buttons.

The function of each button is explained below:

i. Edit

Click this to edit the commission details. The [Affiliate commission setup]() form will appear.

*The **User name** field is not editable in this form. You can only update the commission fee.*

Update the field, then click **Save changes**. To close the form, click in the upper-right corner.

ii. History

Click this to view the edit history of the affiliate commission record. The Affiliate commission history drawer will appear, showing all changes made to the record since its creation in a tabular format.


Affiliate commission history

Sr. No.	User	Commission [%]	Added on
1	Global commission	8.00	Jun 11, 2025 12:39
2	Global commission	12.00	Jun 11, 2025 12:39

The top of the table shows the most recent change, while the bottom displays the initial change made when the affiliate commission was created.

This format allows for an easy review of changes over time. Each change is accompanied by a date and timestamp, enabling proper tracking of modifications.

After reviewing everything, close the form by clicking .

iii. Delete

Click this to delete the commission record from the system. A confirmation message will appear.

Click **OK** to confirm the action or **Cancel** to abort it.

Search for a commission record

Use the search functionality at the top of the list to find a specific commission record.

Click the search bar or to expand it. Click or the search bar again to collapse the section.

Enter the commission name in the **keyword** field and click **Search** to get the results. Click **Clear** to reset the field and start a new search.

12. Blog

Blogs help increase your website's visibility in search engines such as Google and Bing. Regularly publishing long-form articles related to your target audience improves search performance and builds authority.

Yo!Coach allows you to manage blogs through the Blog module. You can manage the blog page, blog posts, blog categories, comments, and contributor settings from this module.

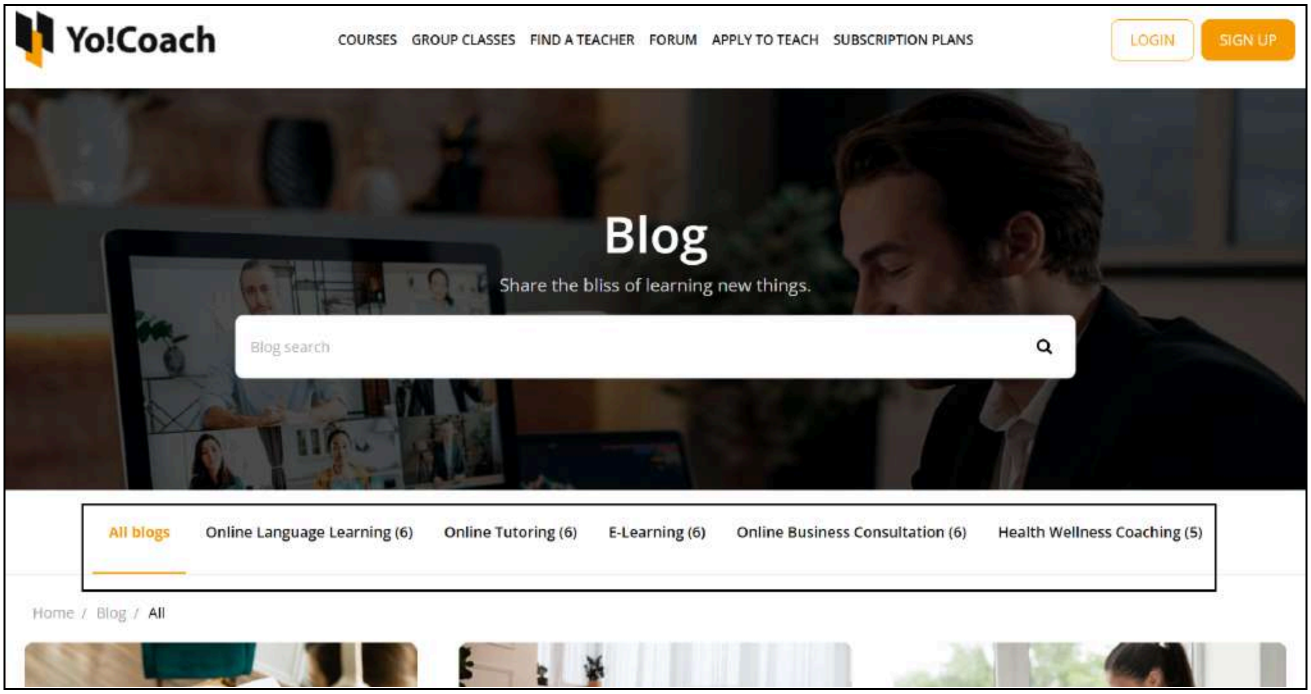
Expand this module to view the submodules. Then, click the submodule to visit their respective pages.

Each submodule is explained in detail.

12.1 Blog categories

By grouping all the related blog content under specific categories, you can help your audience find their desired content much faster.

These categories can be viewed below the blog search bar and above the list of blogs on the blog page (as shown in the image below).

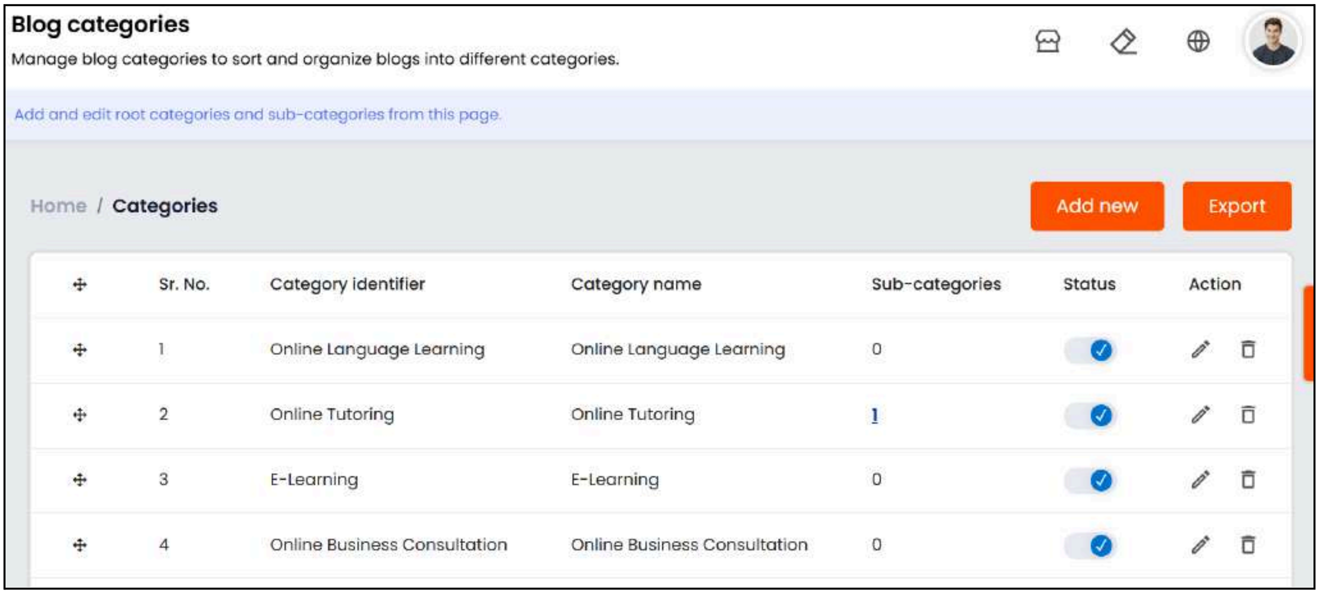


DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

In addition to the individual blog categories, an **All blogs** category will appear first, displaying all blog posts as shown above.

Categories that are not linked to any blog post are not shown on the front end.

Use this page to create and manage categories and subcategories for blog posts.



The list will be empty if you just bought the platform and didn't choose to have dummy content provided by FATbit during the platform installation.

Manage the blog category list

Each entry in the list includes the following details and provides options for management including:

- **Drag-and-drop :** Click this next to a blog category to move it up or down the list, and the serial numbers will automatically update to reflect the new sequence.

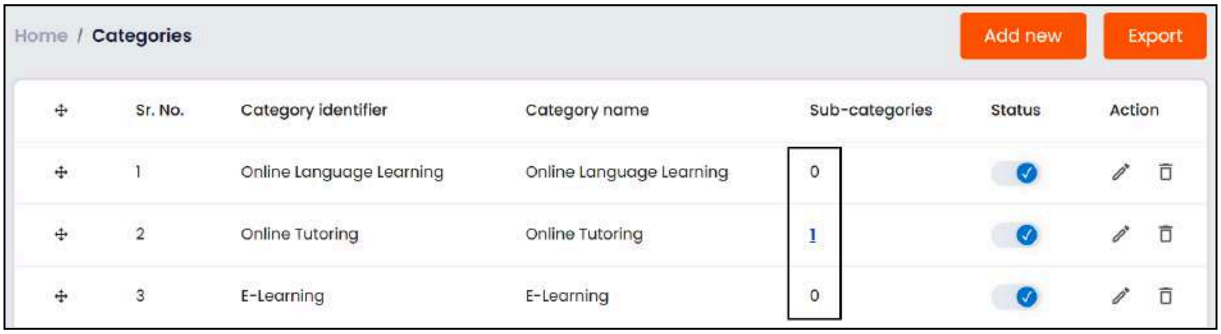
  The blog category will appear in the same order on the blog page and in the category list when linking a blog post.

- **Sr. No:** The serial number.

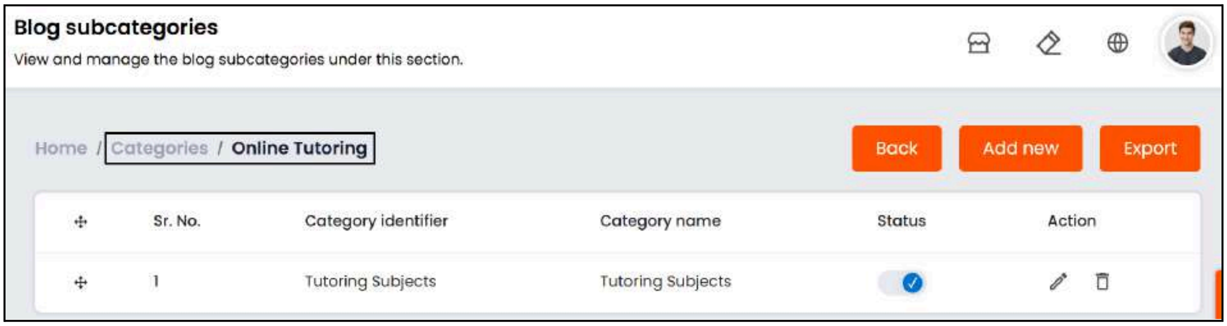
- **Category identifier:** The blog category's system identifier, used to save data in the system and not displayed anywhere on the platform.

__DISCLAIMER:__ The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

- **Category name:** The name of the blog category displayed on the front end and in the category list when linking a blog post.
- **Sub-categories:** The number of sub-categories under a category is displayed as a clickable value.



Clicking it opens the list of sub-categories within the respective category.



The sub-categories page displays the same information and allows the same actions as the main categories page. Only a blog parent category can have subcategories. Subcategories cannot contain further subcategories in Yo!Coach.

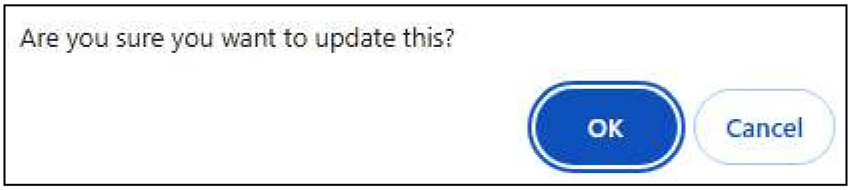
- **Status:** Edit the status (activate or deactivate) of a blog category as per your requirements using the toggle switch beside it, under the status column.

Turn **on**  the toggle switch beside the category to activate it.

Active blog categories are displayed on the front end only if they have been linked to a blog post.

Leave this **off** or turn it **off** to deactivate the category.

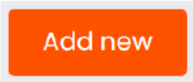
A warning dialog box will appear for both actions, asking if you want to update the status or not.



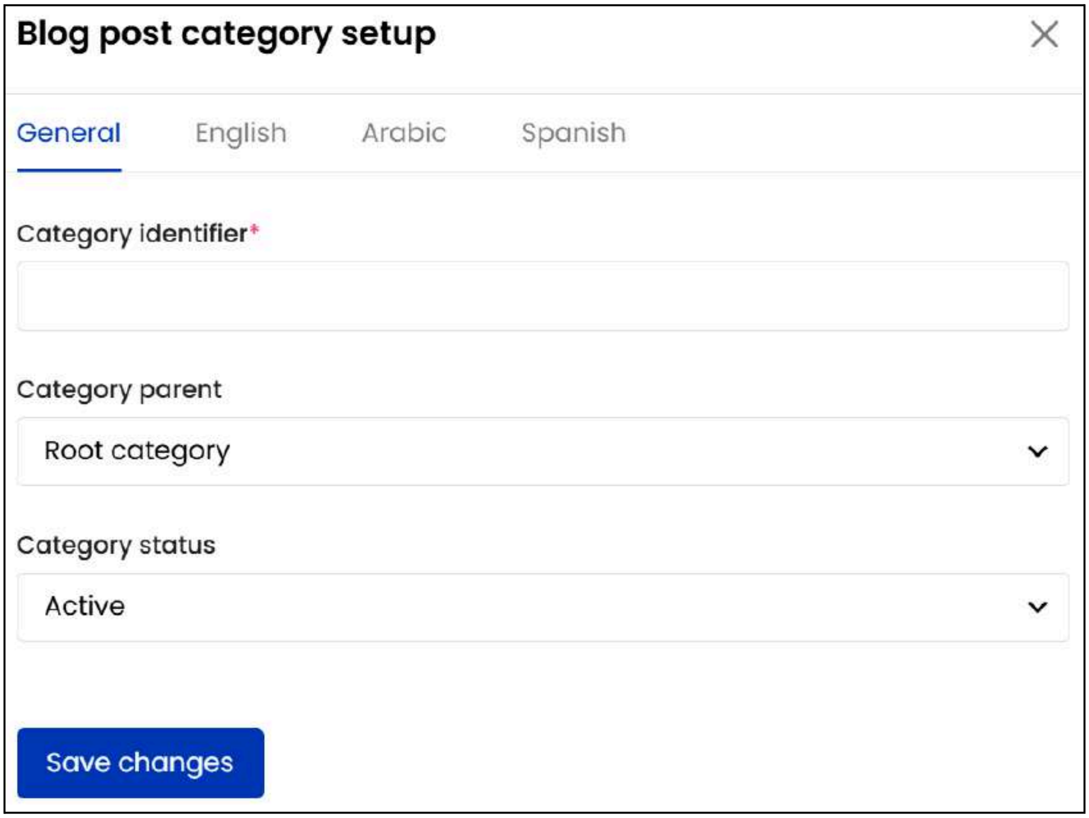
Click **Ok** to delete it or **Cancel** to abort the action.

If the category is linked to blog posts, an error message appears indicating that it cannot be deactivated while it remains linked to those posts.

Add a blog category

Click 

in the upper-right corner of the page to open the **Blog post category setup** form.



DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

This form contains multiple tabs: the General tab, followed by the Primary language tab.

After that, you'll find the Secondary language tabs, corresponding to the languages available on your platform.

Let's start with the **General tab**.

General tab

Update the following:

- **Category identifier*:** Enter a unique category identifier. It can match the category name, as defined under the Language data tabs (e.g., English, Arabic, Spanish).

  The identifier is used to save data in the system and will not be displayed anywhere on the platform. Ensure the identifier is unique; otherwise, an error message will appear.

- **Category parent:** Select the blog category type. To do this, click the field and a dropdown list will appear.

  Select "**root category**" from the list if the blog category is a parent category or main category.

  If the blog category is a subcategory (child category), select the blog category it will fall under from this list.

- **Category status:** Select the status of the category.

  Click the field and select "**Active**" to publish the category on the platform.

  A blog category that has been linked to a blog post will only be visible at the front end, else it won't.

  Select "**Inactive**" to temporarily hide the blog category not allowing you to link blog posts to it.

Once done, click **Save changes**.

This will direct you to the next tab, which is the primary language tab (English tab).

English tab

This is the primary language tab, and completing this tab is mandatory for publishing the blog category on the platform.

Since English is set as the primary language, this tab is labeled **English**.

Update the following:

- **Category*:** Enter the category name. This will be displayed at the front end, on the blog page.
- **Auto-translate into other languages:** Check mark this to automatically update the secondary language(s) data. The data in the subsequent language tab(s) will be auto-filled.

  This feature is available only if the Microsoft text translator API is configured under Settings > System configurations > Third-party APIs.

  If you prefer to manually fill in the secondary language(s) data, leave the checkbox unselected.

Once done, click **Save changes**.

The next tab(s) will be the secondary language tab(s) (Arabic, Spanish, etc.), which include the same fields as the English tab.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

*If you had selected the auto-translate option, the secondary language tab(s) will be prefilled. Review the data, make any necessary edits, click **Save changes**, and close the form.*

*If you did not use the auto-translate feature earlier, use the **Auto-translate & fill language data** button beside the **Save changes** button on each secondary language tab to auto-fill the secondary language fields. Then, click **Save changes**, and move to the next tab, or close the form.*

*If you do not want to fill the secondary language tab(s) at this time, complete only the primary language tab (English tab), click **Save changes**, and close the form.*

After updating all necessary fields, click ✕ in the upper-right corner of the form.

Action buttons

Under the **Action** column, each entry includes two action buttons, allowing you to perform specific actions.

The functions of each button are explained in detail below:

i. Edit

Click this to edit the blog category details.

The [Blog post category setup](#) form will appear.

Update the fields, then click **Save changes**. To close the form, click ✕ in the upper-right corner.

ii. Delete

Click this to delete the blog category from the system. A confirmation message will appear.

Click **OK** to confirm the action or **Cancel** to abort it.

If the category is linked to blog posts, an error message appears indicating that it cannot be deleted while it remains linked to those posts.

Export blog categories data

To export the blog categories data from this page, click **Export** from the upper-right corner.

The data will be downloaded as a `.csv` file (Comma-Separated Values), which can be used for backups or external purposes.

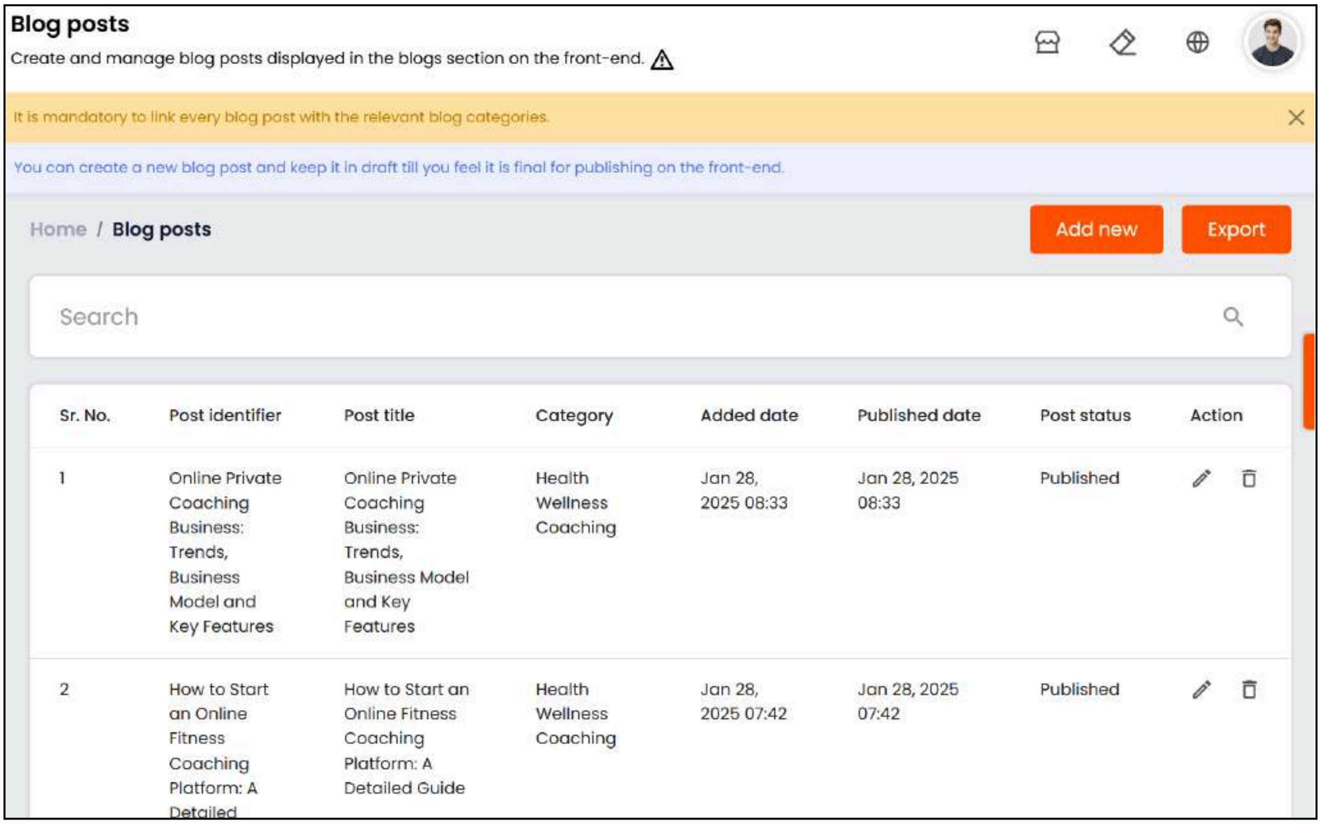
A success message will appear once the download is complete.

12.2 Blog posts

A blog is a web page that you update regularly with long-form articles that cover topics your target audience may want to read or learn about.

The more blog content you add to your platform, the more opportunities your website will have to appear in the top search engine results, including Google and Bing.

Create and manage the blog posts that will be posted on the website's blog, under this module.



The list will be empty if you just bought the platform and didn't choose to have dummy content provided by FATbit during the platform installation.

Manage the blog posts list

Each entry in the list includes the following details:

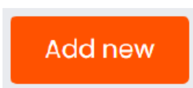
- **Sr. No.:** Serial number.

<u>**DISCLAIMER:**</u> The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

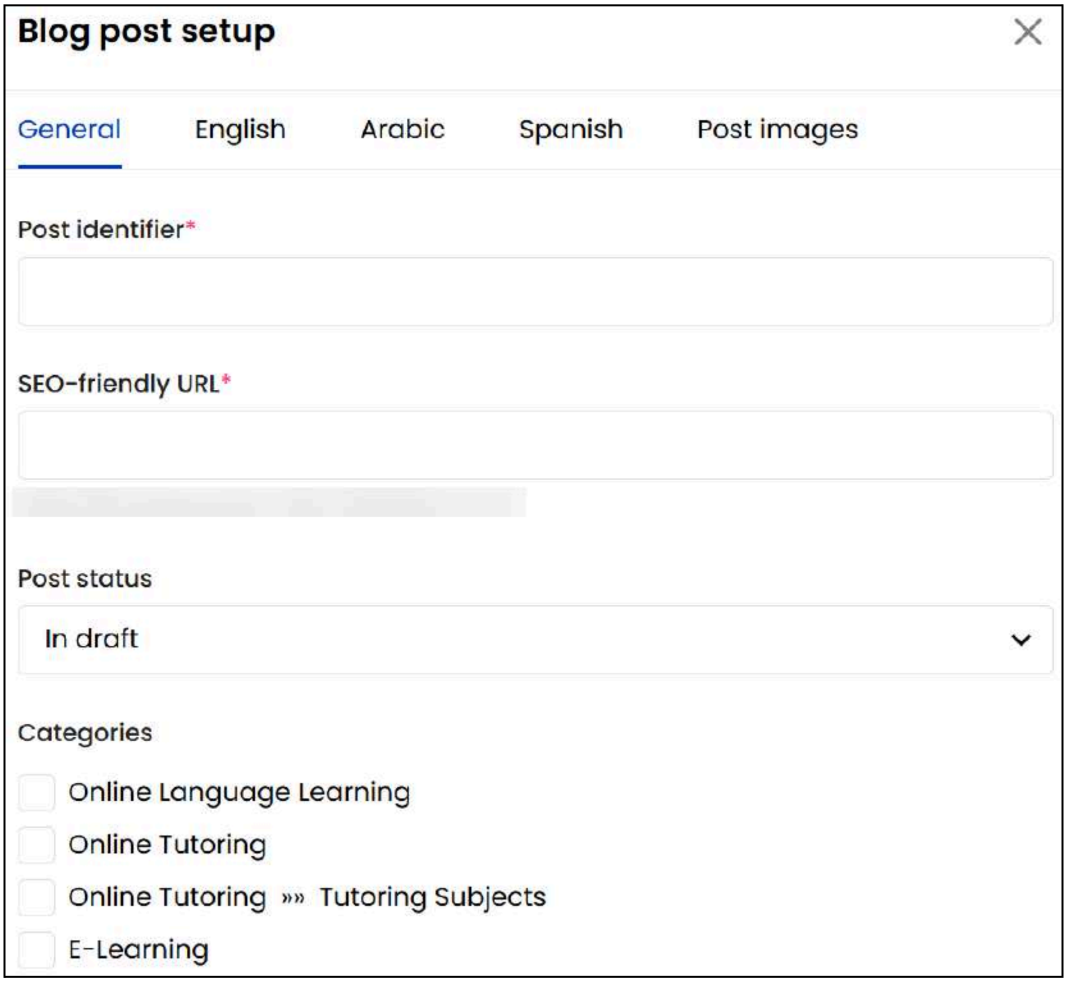
- **Post identifier:** The blog post's system identifier, used to save data in the system and not displayed anywhere on the platform.
- **Post title:** The title of the blog post displayed on the front end.
- **Category:** The name of the category that the blog post is linked to.
- **Added date:** The date and time when the blog post was created.
- **Published date:** The date and time the blog post was published.

  If the blog post hasn't been published yet, the date will be displayed as 0000-00-00 for it.
- **Post status:** The status of the blog, which can include published and in draft.

Add a blog post

Click 

in the upper-right corner of the page to open the **Blog post setup** form.



This form contains multiple tabs: the General tab, followed by the Primary language tab.

After that, you'll find the Secondary language tabs, corresponding to the languages available on your platform. Followed by it is the Post images tab.

Let's start with the **General tab**.

General tab

Update the following:

- **Post identifier*:** Enter a unique post identifier. It can match the post title, as defined under the Language data tabs (e.g., English, Arabic, Spanish).

  The identifier is used to save data in the system and will not be displayed anywhere on the platform. Ensure the identifier is unique; otherwise, an error message will appear.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

- **SEO-friendly URL*:** This field will automatically fill up while you enter the post identifier.

  Edit the URL slug as needed, but it is recommended to keep the default unless it is bulky or not SEO-friendly.

  A preview of the full URL is displayed below the field.

  A slug is the part of a URL that identifies a particular page on a website.

  For instance, if the website is yo-coach.com/benefits-of-teaching-online, the slug is benefits-of-teaching-online. You need to enter this part of the URL in this field.

- **Post status:** Select the status of the blog post.

  Click the field and select "**Active**" to publish the post on the platform.

  Select "**Inactive**" to temporarily hide the blog category not allowing you to link blog posts to it.

- **Category parent:** Check mark one or more categories to link the blog post with a blog category.

  The blog post will be listed under the selected blog category on the front-end accordingly.

- **Allow comments:** Check mark to activate the comments section for this blog post, allowing users to share their thoughts via comments on it.

  Deselect or leave it unchecked to deactivate the comments section. With this, users won't be able to share their thoughts on the blog posted.

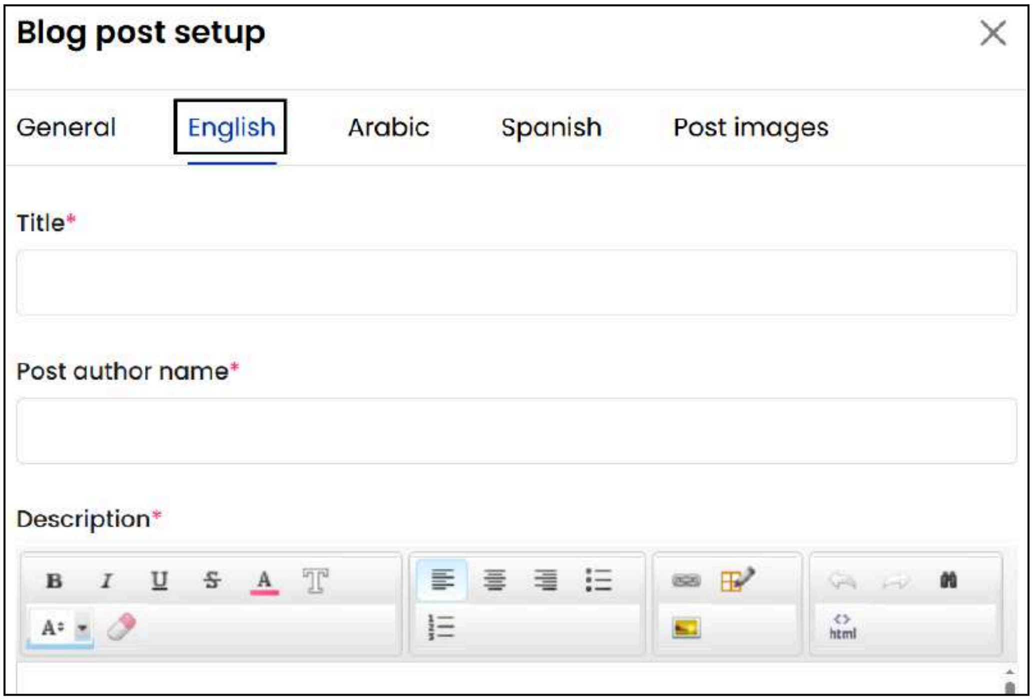
Once done, click **Save changes**.

This will direct you to the next tab, which is the primary language tab (English tab).

English tab

This is the primary language tab, and completing this tab is mandatory for publishing the blog post on the platform.

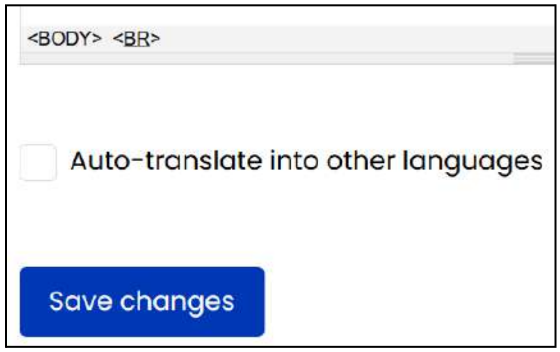
Since English is set as the primary language, this tab is labeled **English**.



Update the following:

- **Title*:** Enter the blog post title that will be visible at the front end.
- **Post author name*:** Enter the author's name that will appear with the blog post at the front end.
- **Description*:** Use the various editing tools shared at the top to format the blog content and make it look attractive.

The description will be displayed in the same format and style at the front end as you set it up here.



- **Auto-translate into other languages:** Check mark this to automatically update the secondary language(s) data. The data in the subsequent language tab(s) will be auto-filled.

  *This feature is available only if the [Microsoft text translator API](#) is configured under **Settings > System configurations > [Third-party APIs](#)**.*

  If you prefer to manually fill in the secondary language(s) data, leave the checkbox unselected.

Once done, click **Save changes**.

The next tab(s) will be the secondary language tab(s) (Arabic, Spanish, etc.), which include the same fields as the English tab.

*If you had selected the auto-translate option, the secondary language tab(s) will be prefilled. Review the data, make any necessary edits, click **Save changes**, and move to the [Post images](#) tab.*

*If you did not use the auto-translate feature earlier, use the **Auto-translate & fill language data** button beside the **Save changes** button on each secondary language tab to auto-fill the secondary language fields. Then, click **Save changes**, and move to the next tab.*

*If you do not want to fill the secondary language tab(s) at this time, complete only the primary language tab (English tab), click **Save changes**, and move to the [Post images](#) tab.*

Post images tab

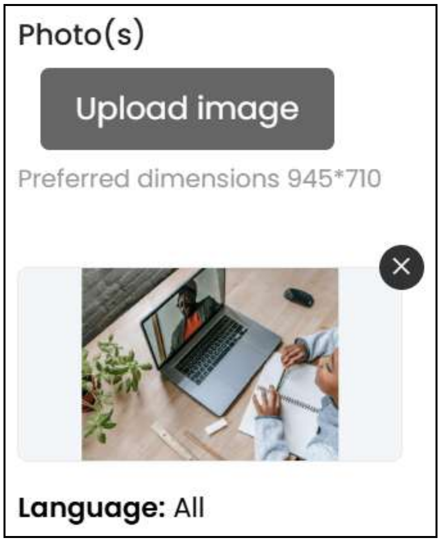
The last tab, after all the secondary language tabs, is the **Post images** tab. Click this tab to visit it.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

Update the following:

- **Languages:** Select the preferred language from the language dropdown list for which the next field (image) will be filled. Select "**All languages**" as the option if the image will be the same for all the languages.
- **Photo(s):** Click the **Upload image** button.

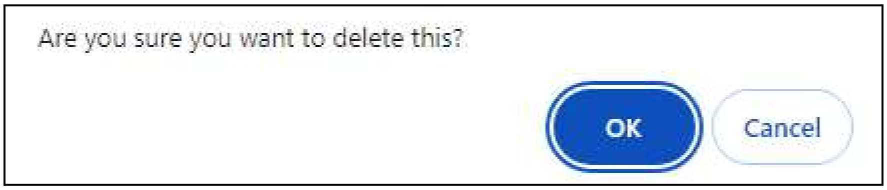
  Select the image from your system and click **Open**. And the image will be uploaded and displayed below the field.



To delete an image, click  located at the upper-right corner.

A warning dialog box will appear at the top of the page asking if you want to delete it or not.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.



Click **OK** to the action or **Cancel** to abort it.

Upload language-specific images for each language that the platform is available in. Select the language and upload the image accordingly.

*When you upload the image, it is saved automatically in the system, so no **Save changes** button is provided under this tab.*

After completing the process, click to close the form. The blog post will then be added to the list.

Action buttons

Under the **Action** column, each entry includes two action buttons, allowing you to perform specific actions.

The functions of each button are explained in detail below:

i. Edit

Click this to edit the blog post details.

The [Blog post setup] form will appear.

Update the fields, then click **Save changes**. To close the form, click in the upper-right corner.

ii. Delete

Click this to delete the blog post from the system. A confirmation message will appear.

Click **OK** to confirm the action or **Cancel** to abort it.

Search for a blog post

Use the search functionality at the top of the list to find a specific blog post.

Click the search bar or to expand it. Click or the search bar again to collapse the section.

There are two filters that help narrow down the search. Each field is explained below:

- **Keyword:** Enter the blog post title or blog post identifier that you are searching for.
- **Post status:** Click the field and select the status of the blog post from the dropdown list with the following options:
    - In draft
    - Published

Search for a blog post by filling in a single field or both fields.

After filling in the desired fields, click **Search** to display the results. Click **Clear** to reset all fields and start a new search.

Export blog posts data

To export the blog posts data from this page, click **Export** from the upper-right corner.

The data will be downloaded as a `.csv` file (Comma-Separated Values), which can be used for backups or external purposes.

A success message will appear once the download is complete.

To export specific blog posts data, use the [search bar] to apply the necessary filters and define the criteria.

After setting the filters and clicking **Search** to view the results, click **Export** to download the filtered data as a `.csv` file.

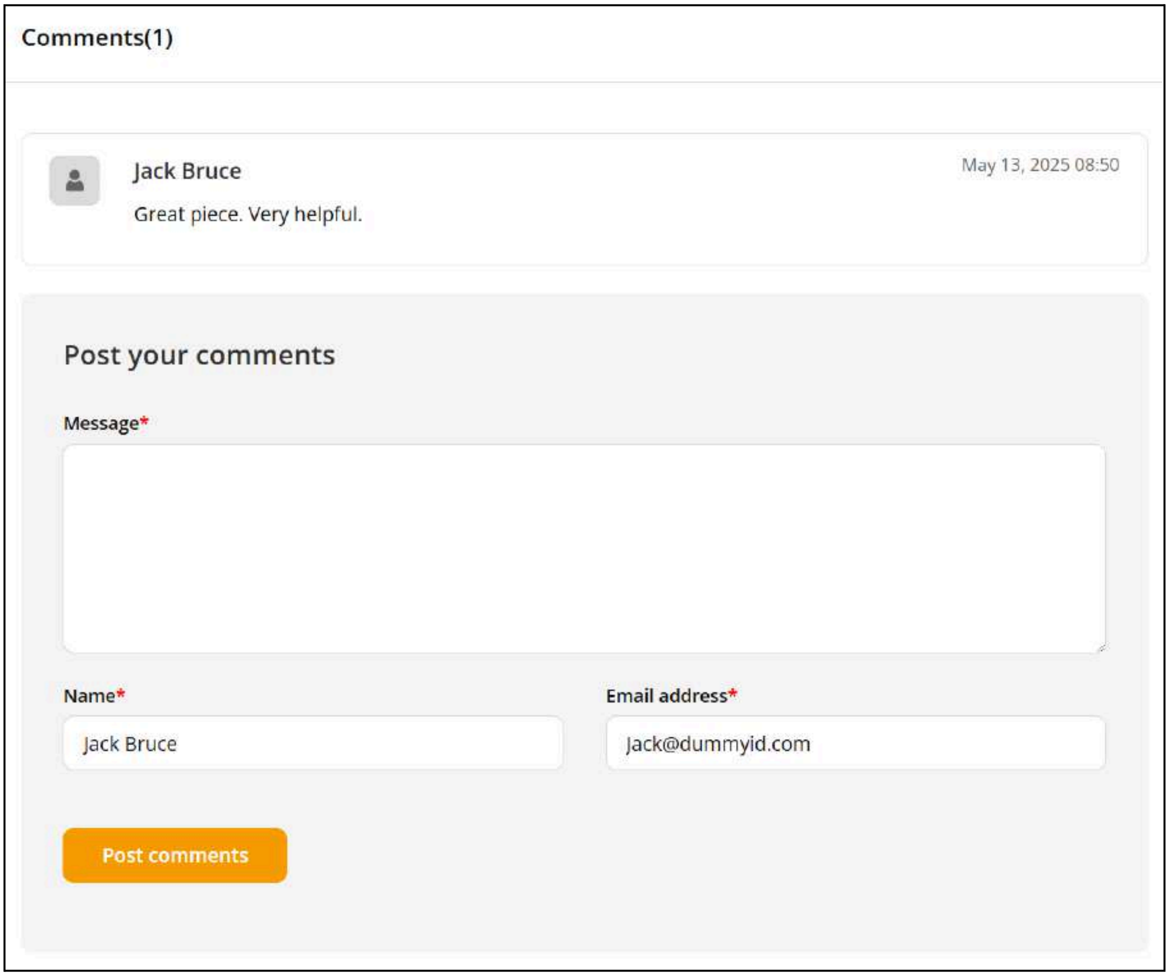
DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

12.3 Blog comments

While creating a blog post, you have the option to activate or deactivate the comments section, allowing or restricting users from commenting on the respective blog post.

For the blog posts where you allow users to comment, a comment section is visible below the respective blog posts.

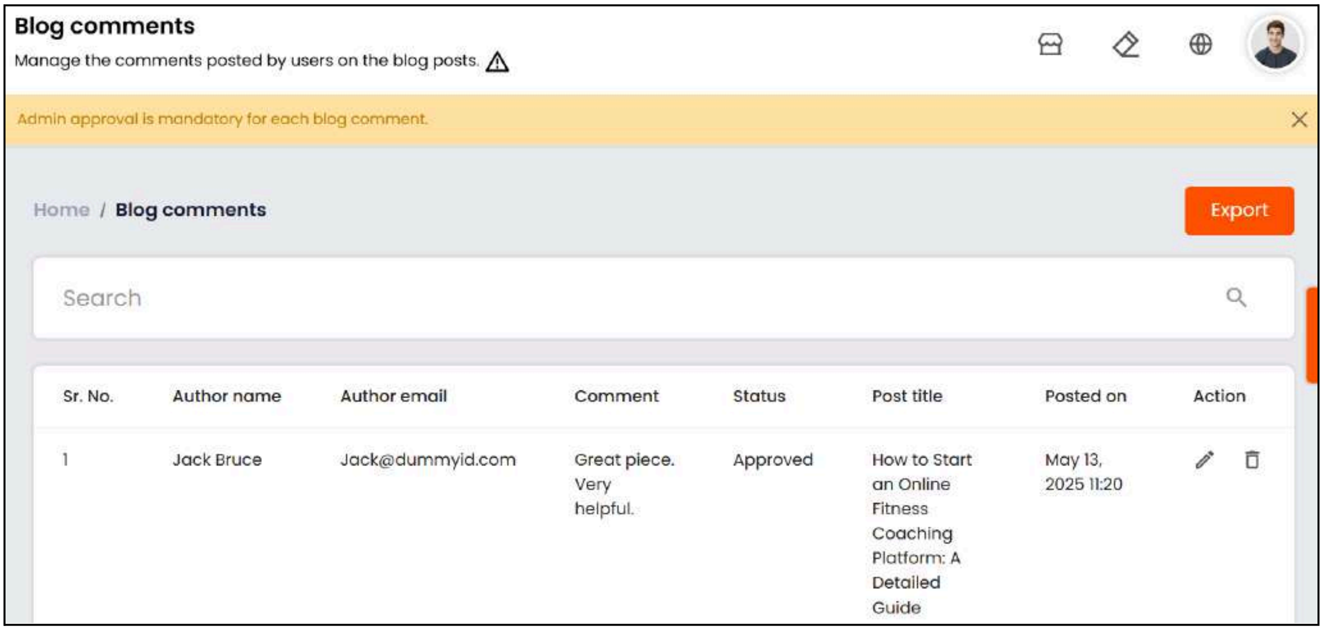
A user can leave a comment only if they have an account on the platform and have logged into their account.



No comment is directly posted on the website. You need to approve the comment before it is published.

All the comments made are listed under this submodule for you to review accordingly.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.



The list will be empty if you just bought the platform and didn't choose to have dummy content provided by FATbit during the platform installation.

Manage the blog comments list

Each entry in the list includes the following details:

- **Sr. No.:** Serial number.
- **Author name:** The name of the author who made the request.
- **Author email:** The email address of the author.
- **Author phone:** The phone number of the author.
- **Status:** The blog comment request's status. The options include:
    - **Approved:** This implies that the comment has been approved. Approved comments are displayed on the front end.
    - **Pending:** This is the default status of every blog comment request received. Pending comments are not displayed on the front end.
- **Posted on:** The date and time when the comment request was placed.

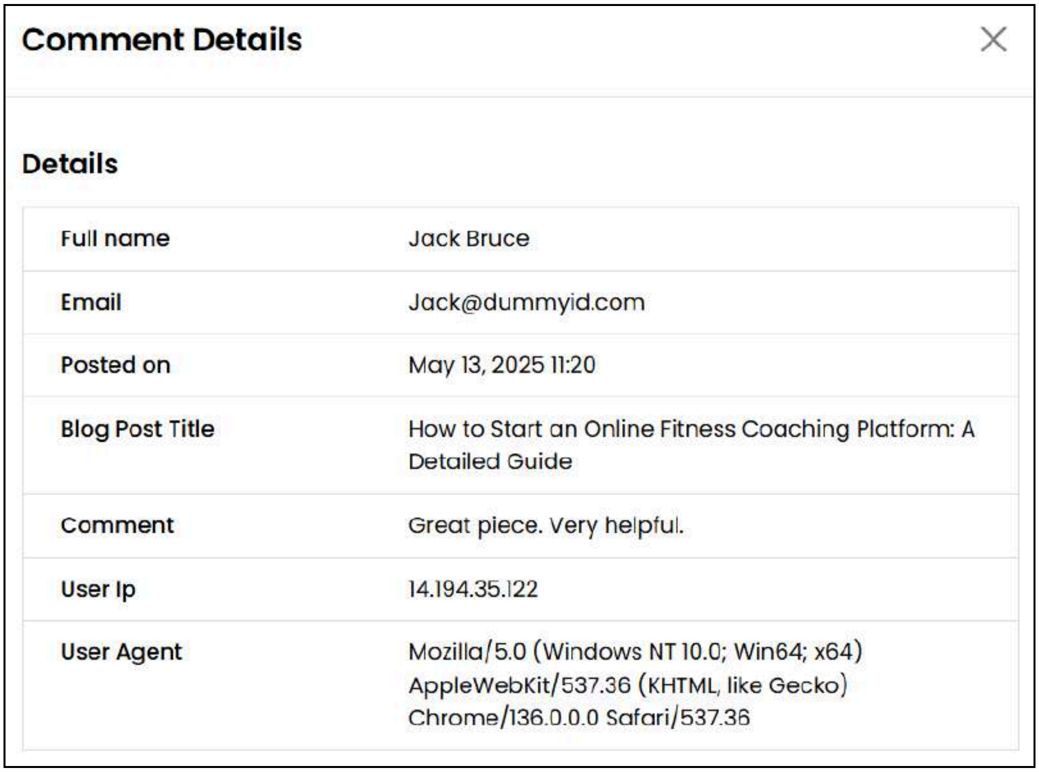
Action buttons

Under the **Action** column, each entry includes two action buttons, allowing you to perform specific actions.

The functions of each button are explained in detail below:

i. Edit

Click this to review the blog comment details and edit its status. The **Comment details** form will appear.


Comment Details

Details

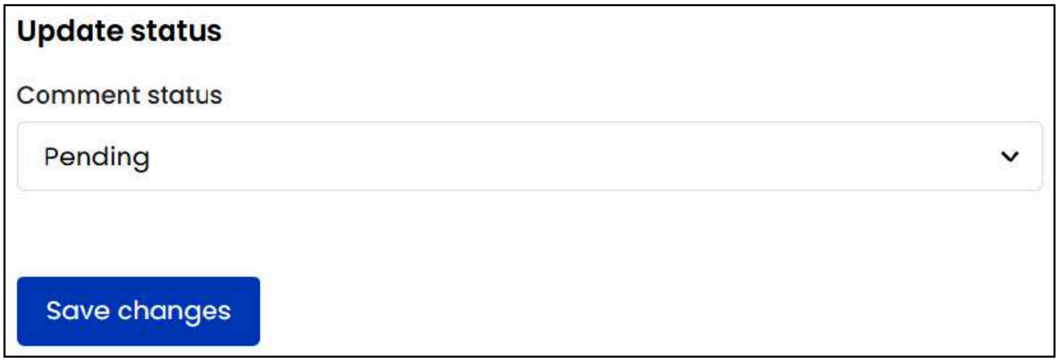
Full name	Jack Bruce
Email	Jack@dummyid.com
Posted on	May 13, 2025 11:20
Blog Post Title	How to Start an Online Fitness Coaching Platform: A Detailed Guide
Comment	Great piece. Very helpful.
User Ip	14.194.35.122
User Agent	Mozilla/5.0 (Windows NT 10.0; Win64; x64) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/136.0.0.0 Safari/537.36

Review the details shared under this form, which includes:

- **Full name:** The full name of the author who made the blog comment.
- **Email:** The email of the author.
- **Posted on:** The date and time when the blog comment was made.
- **Blog post title:** The title of the blog post on which the comment was made.
- **Comment:** The comment left by the user.

- **User IP:** The IP address of the user's computer, through which the comment was made.
- **User agent:** The browser and system details from which the user made the comment.

After reviewing this, scroll down to update the status under the **Update status** section of the form:



- **Comment status:** Select the status of the comment made.

  To change the status, click the field and a dropdown list will appear with the following options:

  - **Pending:** Leave the status as pending if you do not want to accept it or if you have not yet decided if you want to post it or not.
  - **Approved:** Select this option when you have agreed to the comment. With this, the comment will be published at the front end.

  Once you make a selection and save it, the updated status will be sent to the author on the email address shared.

Once everything has been reviewed and the status has been updated, click **Save changes**.

Close the form by clicking in the upper-right corner.

ii. Delete

Click this to delete the blog comment from the system. A confirmation message will appear.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

Click **OK** to confirm the action or **Cancel** to abort it.

Search for a blog comment

Use the search functionality at the top of the list to find a specific blog comment.

Click the search bar or to expand it. Click or the search bar again to collapse the section.

There are two filters that help narrow down the search. Each field is explained below:

- **Keyword:** Enter the author's name or email whose comment you are searching for.
- **Comment status:** Click the field and select the status of the blog comment from the dropdown list with the following options:
  - Pending
  - Approved

Search for a blog comment by filling in a single field or both fields.

After filling in the desired fields, click **Search** to display the results. Click **Clear** to reset all fields and start a new search.

Export blog comment data

To export the blog comments data from this page, click **Export** from the upper-right corner.

The data will be downloaded as a `.csv` file (Comma-Separated Values), which can be used for backups or external purposes.

A success message will appear once the download is complete.

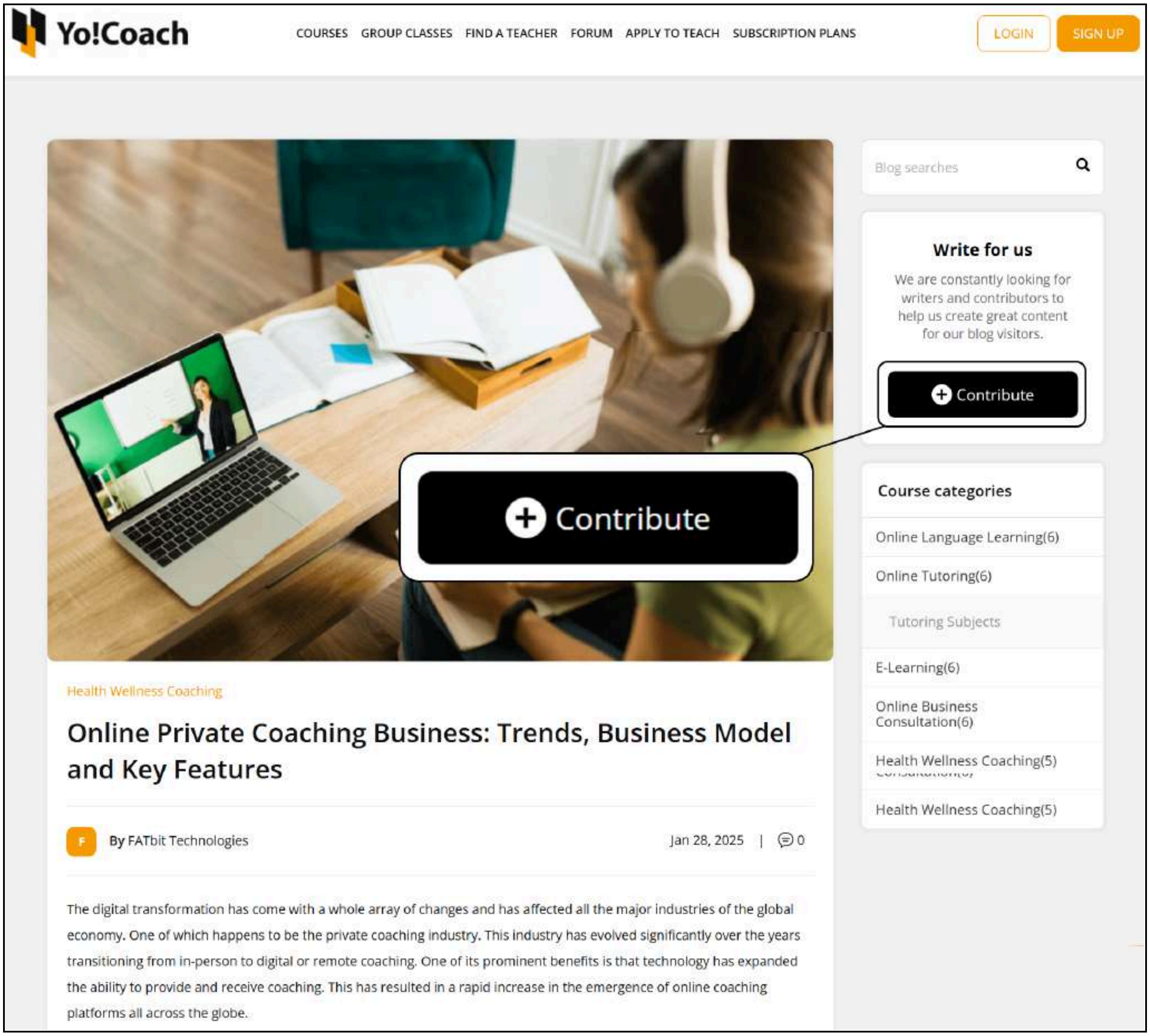
To export specific blog comments data, use the [search bar] to apply the necessary filters and define the criteria.

After setting the filters and clicking **Search** to view the results, click **Export** to download the filtered data as a `.csv` file.

12.4 Blog contributions

Visitors and users can share blog post ideas by clicking the **Contribute** button on any blog post page.

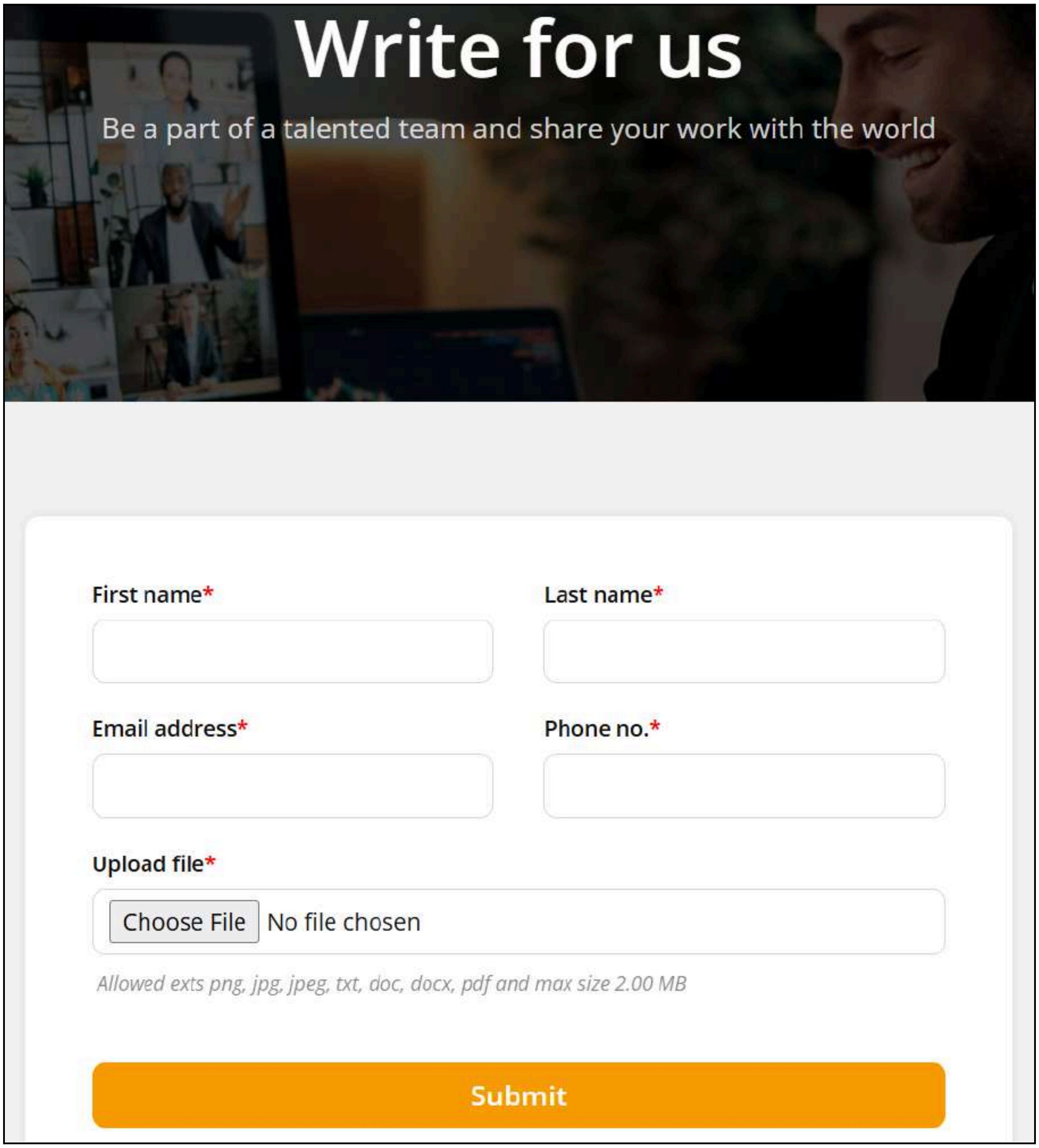
This button appears below the blog search bar on the right side of every blog post page.



Clicking the button directs users to the blog contribution page, where they can submit a blog post using a form designed for contributing content to the platform.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

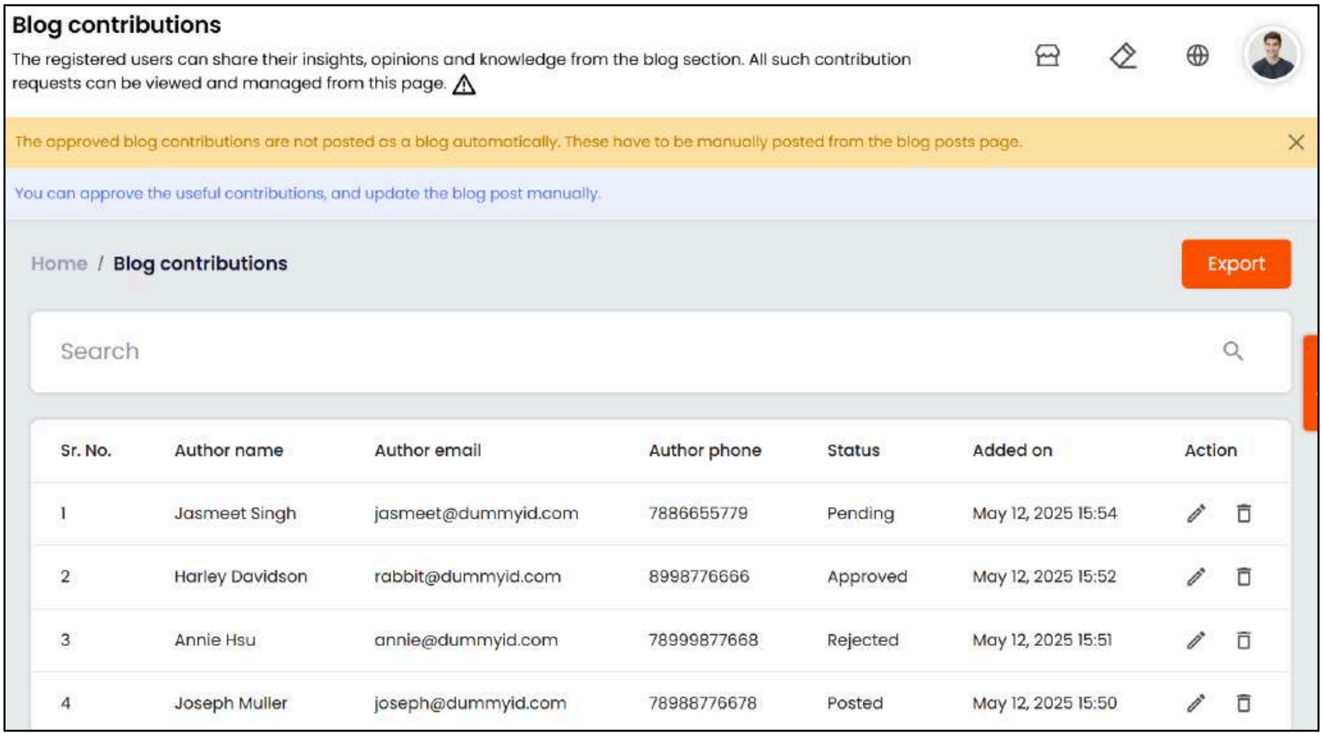
They need to complete the form.



Once all the details have been added, and the document containing the blog content has been uploaded, the user needs to click **Submit** to send their blog contribution request.

Every contribution request submitted through this process will appear under this submodule.

You can review each request, and if you decide to accept a contribution, manually create a blog post using the submitted details.



Then, update the contribution status to **Approved**. Once the blog post is published, change the status to **Posted** to notify the author.

If the contribution is not accepted, update the status to **Rejected** to inform the author that their submission was declined.

The list will be empty if you just bought the platform and didn't choose to have dummy content provided by FATbit during the platform installation.

Manage the blog contributions list

The list displays the following information:

- **Sr. no:** Serial number
- **Author name:** The name of the author who made the request.
- **Author email:** The email address of the author.
- **Author phone:** The phone number of the author.
- **Status:** The blog contribution request's status. The options include:

- ○ **Approved:** This implies that the contribution has been accepted, but it has not yet been posted.
- ○ **Posted:** This implies that the contribution has been posted on the blog.
- ○ **Pending:** This is the default status of every blog contribution request received. This implies that no decision has been made about the contribution yet.
- ○ **Rejected:** This implies that the contribution wasn't accepted.

- **Added on:** The date and time when the contribution request was placed.

Action buttons

Under the **Action** column, each entry includes two action buttons, allowing you to perform specific actions.

The functions of each button are explained in detail below:

i. Edit

Click this to review the blog contribution details and edit its status. The **Contribution detail** form will appear.


Contribution detail

Details

Full name	Jasmeet Singh
Email	jasmeet@dummyid.com
Phone no.	7886655779
Added on	May 12, 2025 15:54
Status	Pending
Attached file	1747045484-Test.docx

Review the details shared under this form, which includes:

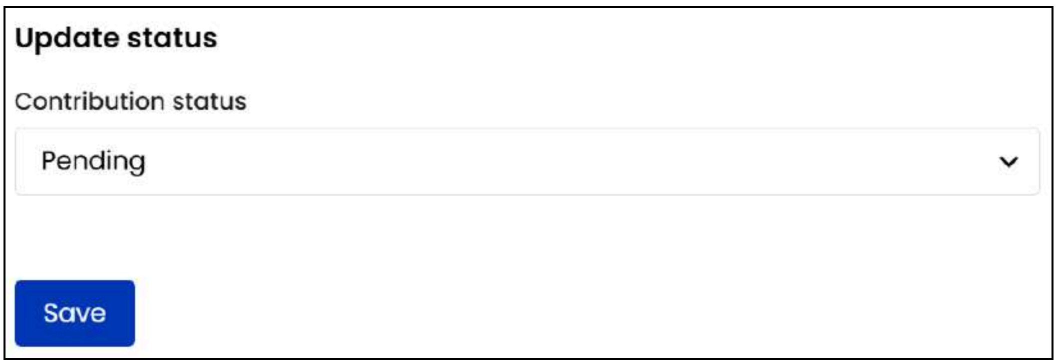
<u>**DISCLAIMER:**</u> The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

- **Full name:** The full name of the author who made the blog contribution.
- **Email:** The email of the author.
- **Phone no.:** The phone number of the author
- **Added on:** The date and time when the blog contribution was made.
- **Status:** The current status of the blog contribution. If it was recently submitted, the status will be **Pending**.

  You can update the status using the last field in this form.
- **Attached file:** This is the file containing the blog contribution submitted by the user.

  Click the file name (highlighted in blue) to download it automatically to your system, then open and review its contents.

After reviewing this, scroll down to update the status under the **Update status** section of the form:



- **Contribution status:** Select the status of the contribution made.

  To change the status, click the field and a dropdown list will appear with the following options:
  - **Pending:** Leave the status as pending or select this when you have not yet decided if you want to post this contribution or not.
  - **Approved:** Select this option when you have agreed to post this contribution to the website, but you have not yet posted it on the website.
  - **Posted:** Select this option when you have used the contribution to create a blog and have posted the same on the website blog page.

<u>**DISCLAIMER:**</u> The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

- **Rejected:** Select this option when you do not agree to this contribution and reject it.

Once everything has been reviewed and the status has been updated, click **Save changes**. The updated status will be sent to the author on the email address shared.

Close the form by clicking in the upper-right corner.

ii. Delete

Click this to delete the blog contribution's record from the system. A confirmation message will appear.

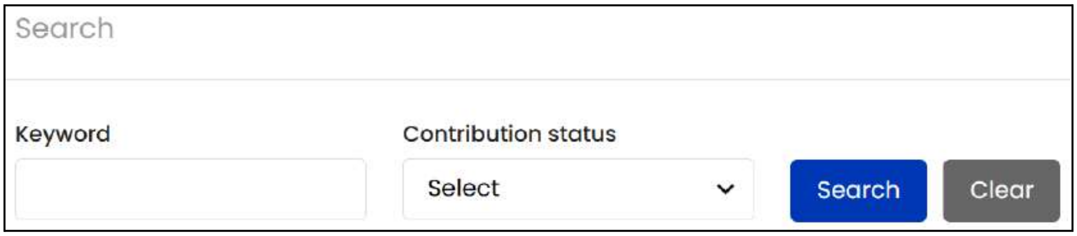
Click **OK** to confirm the action or **Cancel** to abort it.

Search for a blog contribution

Use the search functionality at the top of the list to find a specific blog contribution.

Click the search bar or to expand it. Click or the search bar again to collapse the section.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.



There are two filters that help narrow down the search. Each field is explained below:

- **Keyword:** Enter the author's name, email or phone number whose contribution you are searching for.
- **Contribution status:** Click the field and select the status of the blog contribution from the dropdown list with the following options:
    - Pending
    - Approved
    - Posted
    - Rejected

Search for a blog contribution by filling in a single field or both fields.

After filling in the desired fields, click **Search** to display the results. Click **Clear** to reset all fields and start a new search.

Export blog contributions data

To export the blog contributions data from this page, click **Export** from the upper-right corner.

The data will be downloaded as a `.csv` file (Comma-Separated Values), which can be used for backups or external purposes.

A success message will appear once the download is complete.

To export specific blog contributions data, use the search bar to apply the necessary filters and define the criteria.

After setting the filters and clicking **Search** to view the results, click **Export** to download the filtered data as a `.csv` file.

13 SEO

Certain measures are taken to make an e-commerce website and its products visible in the Search Engine Results Pages (SERPs). These measures are called SEO (Search Engine Optimization).

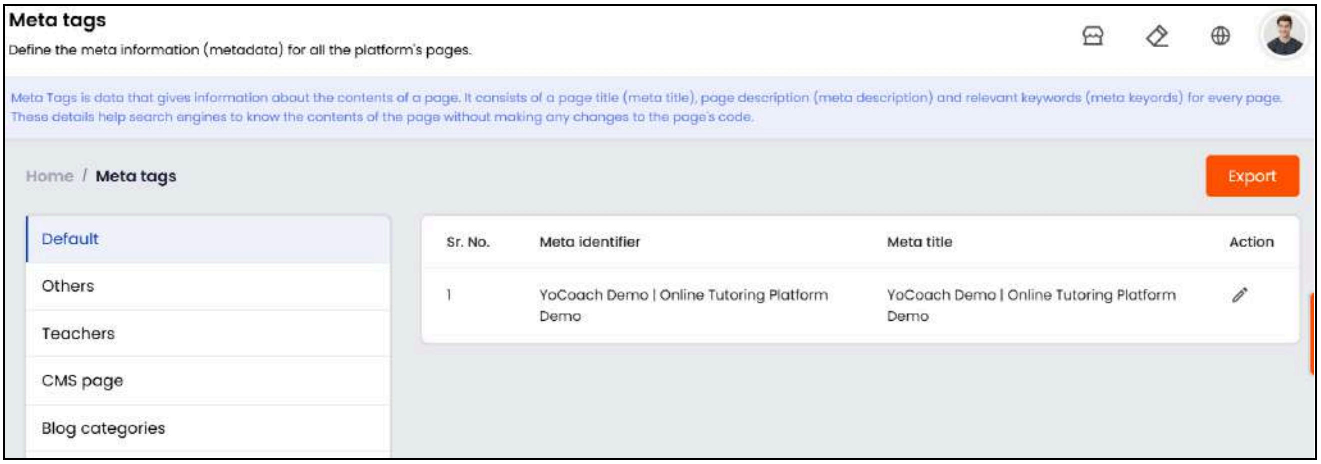
Under this module, you can set up and manage the language specific SEO details, including the meta title, meta keyword, meta description and other meta tags for all pages (home page, each teacher profile page, subject page, courses page, group classes page, etc.) that will be displayed at the front end of the platform.

Expand this module to view the submodules. Then, click the submodule to visit their respective pages.

Each submodule is explained in detail.

13.1 Meta tags

Use this submodule to define and manage meta information (meta tags) for all pages published on the front end of the platform.



Points to note

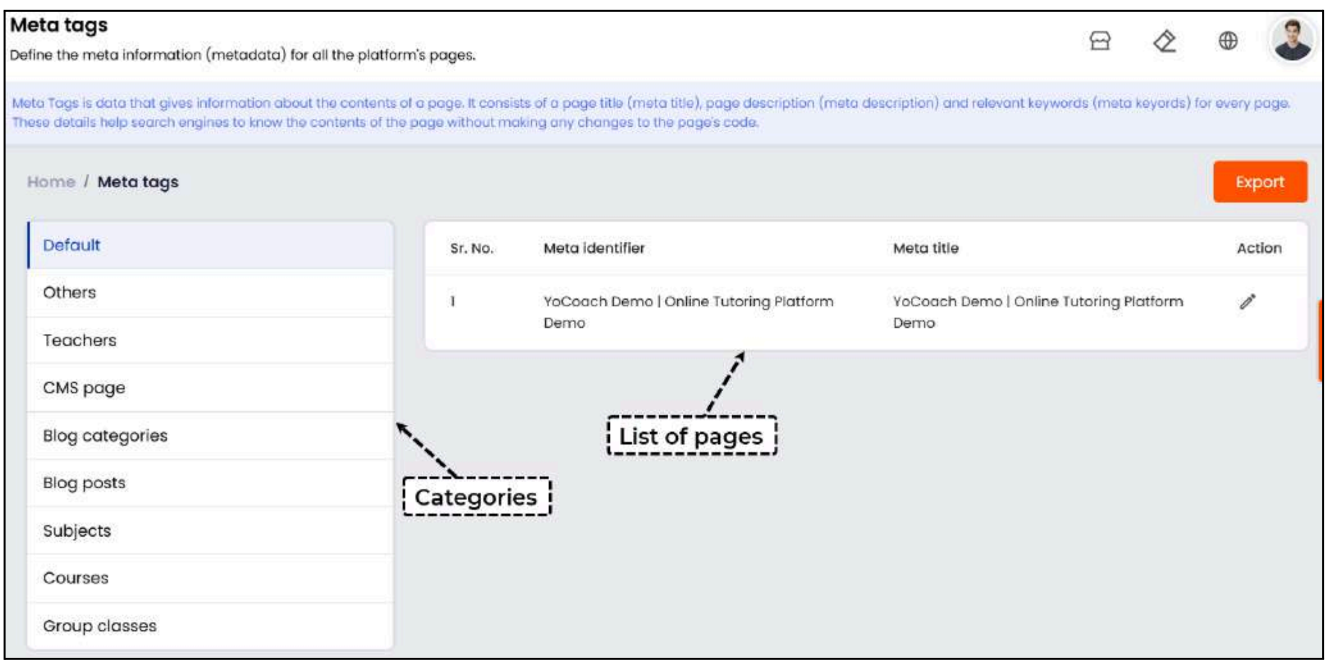
- Every page on a website includes metadata attributes. These attributes describe the information contained on the page and help search engines deliver more accurate search results.

<u>**DISCLAIMER:**</u> The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

- Meta tags are HTML elements used to provide additional information about a web page. The most common types include:
    - Title tag
    - Description tag
    - Keyword tag
- Meta tags are placed in the *<head>* section of a web page's HTML code. They are not visible to users but are used by search engines for indexing and displaying search results.
- For example, if a web page is about selling math courses and includes relevant meta tags, search engines like Google will use those tags to display that page when a user searches for affordable math courses.
- It is important to add a meta title and meta description to every page on your website. Doing so improves the chances of the page being indexed correctly and ranked higher in search engine result pages (SERPs), which can drive more traffic to your site.

Manage the meta tags list

This submodule includes a predefined list of all available web pages on the platform.



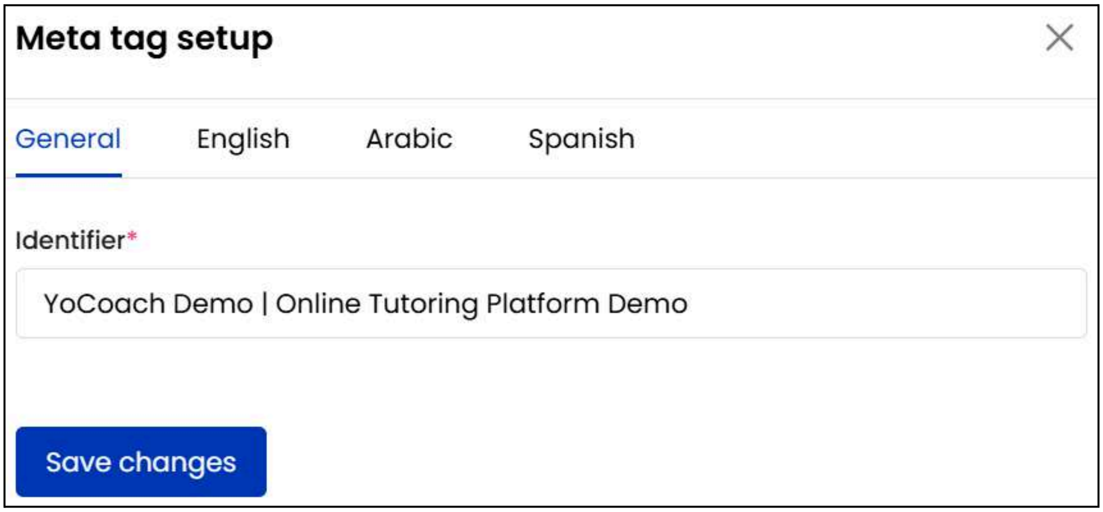
DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

To simplify management, these pages are grouped into categories based on their content.

- Categories are displayed on the left side of the screen in a vertical navigation bar. Scroll up or down to view all available categories (listed and explored below).
- Click a category to display the list of web pages under that category on the right side of the screen. Only one action is available for each page listed—editing the meta tags.

Action button

There is a single action button next to each entry—**Edit** . Click this to edit the meta tag details. The **Meta tag setup** form will appear.



This form contains multiple tabs: the General tab, followed by the Primary language tab. After that, you'll find the **Secondary language** tabs, corresponding to the languages available on your platform. Let's start with the **General tab**.

General tab

Update the following:

- **Identifier*:** Edit the meta title identifier. It can match the meta title, as defined under the Language data tabs (e.g., English, Arabic, Spanish).

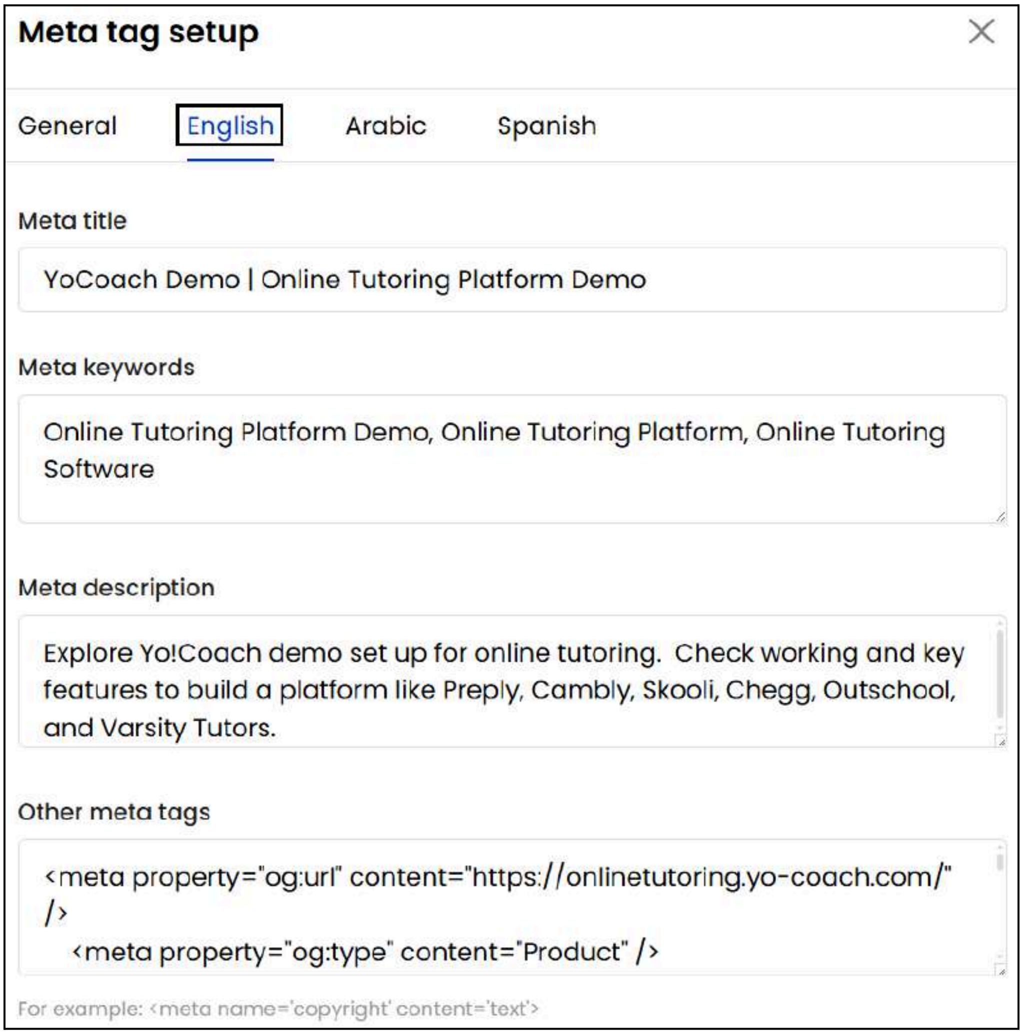
  The identifier is used to save data in the system and will not be displayed anywhere on the platform. Ensure the identifier is unique; otherwise, an error message will appear.

Once done, click **Save changes**. This will direct you to the next tab, which is the primary language tab (English tab).

English tab

This is the primary language tab, and completing this tab is mandatory for publishing the meta tags of the respective page on the platform.

Since English is set as the primary language, this tab is labeled **English**.



Complete the following fields in the primary language to define the meta information for the selected page:

- **Meta title*:** Enter the meta title in the primary language. The title should include relevant keywords and clearly describe what the page is about. Recommended character length: 55 to 75 characters.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

- **Meta keywords*:** Enter the meta keywords in the primary language. Separate each keyword or phrase with a comma.

  Tip: Consult a marketing expert for optimal keyword selection.

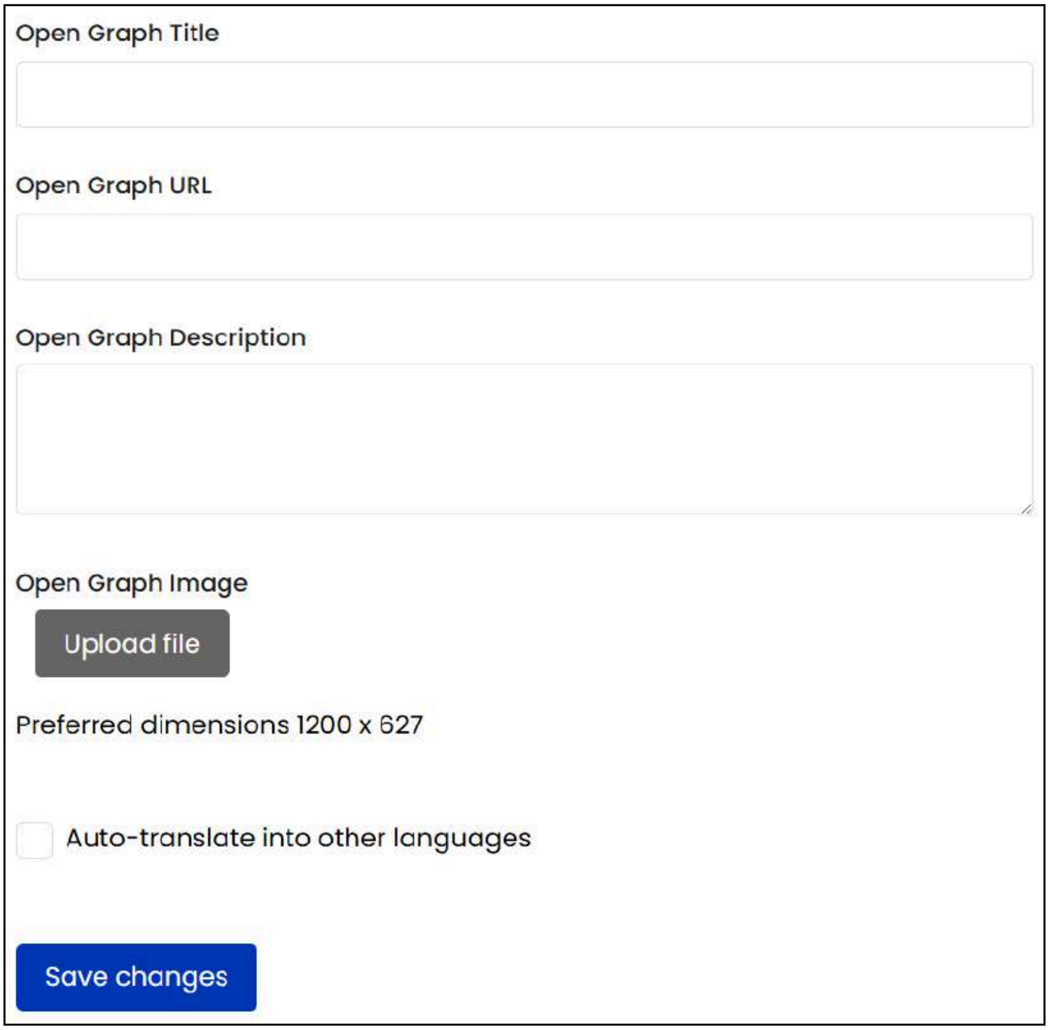
- **Meta description*:** Enter a concise summary of the page content in the primary language. Recommended character length: 140 to 165 characters.

- **Other meta tags:** Add any additional meta tags relevant to the page. Use the correct HTML format. Example: *<meta name="copyright" content="text">*

  You can also include Open Graph meta tags in this section.

The following fields are used to define how the page appears when shared on social media platforms.

You can fill them or leave them blank, based on your requirements.



DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

- **Open graph title:** Enter the Open graph title. This is typically similar to the meta title but may also include branding (e.g., product or company name).

- **Open graph URL:** Enter the full URL of the page. This helps social media platforms reference the correct destination.

- **Open graph description:** Enter a brief description of the page for social media. This is usually the same as the meta description, though it can be adapted for social context.

- **Open graph image:** Upload an image that will appear when the page is shared on social platforms.

  To upload, click **Upload file**, select from your system, and click **Open**. The file will be uploaded automatically.

  If no image is uploaded, a default image may appear or the preview may remain empty.

  This field is not available for certain pages, such as teacher profile pages.

- **Auto-translate into other languages:** Check mark this to automatically update the secondary language(s) data. The data in the subsequent language tab(s) will be auto-filled.

  *This feature is available only if the [Microsoft translator API](#) is configured under **Settings > System configurations > [Third-party APIs](#)**.*

  If you prefer to manually fill in the secondary language(s) data, leave the checkbox unselected.

Once done, click **Save changes**.

The next tab(s) will be the secondary language tab(s) (Arabic, Spanish, etc.), which include the same fields as the English tab.

*If you had selected the auto-translate option, the secondary language tab(s) will be prefilled. Review the data, make any necessary edits, click **Save changes**, and close the form.*

*If you did not use the auto-translate feature earlier, use the **Auto-translate & fill language data** button beside the **Save changes** button on each secondary language tab to auto-fill the secondary language fields. Then, click **Save changes**, and move to the next tab, or close the form.*

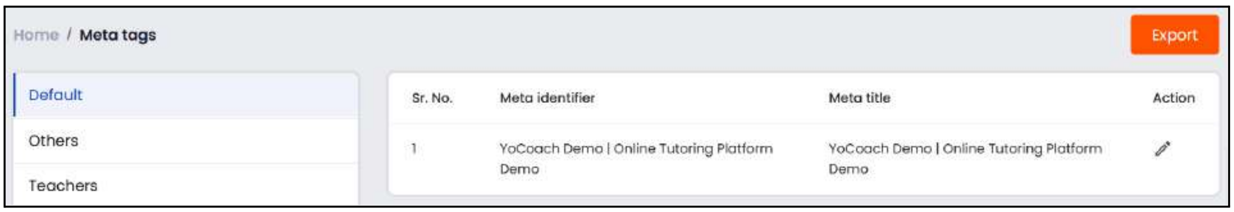
*If you do not want to fill the secondary language tab(s) at this time, complete only the primary language tab (English tab), click **Save changes**, and close the form.*

After updating all necessary fields, click in the upper-right corner of the form.

Pages categorization

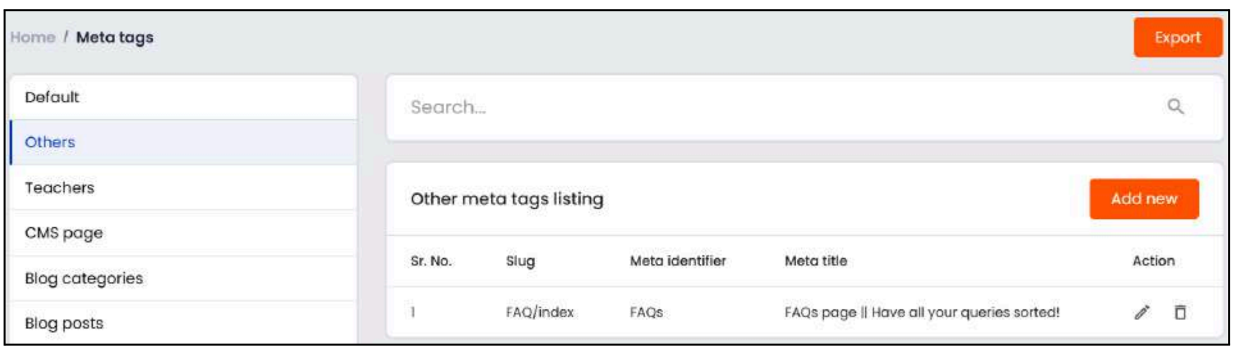
The web pages under this submodule are grouped into 9 categories, including:

- **Default:** This category contains a single web page—the home page of the front-end website.



The list displays the page title identifier and meta title. Click next to the entry to update the meta tag details.

- **Others:** This is a blank page that allows you to add custom URLs—those not already listed—and define their associated meta tag details.



Click Add new button to include a new URL in the list. The form used is the same as the [Meta tag setup] form, with one additional field in the [General tab]: Slug (as shown in the image below).

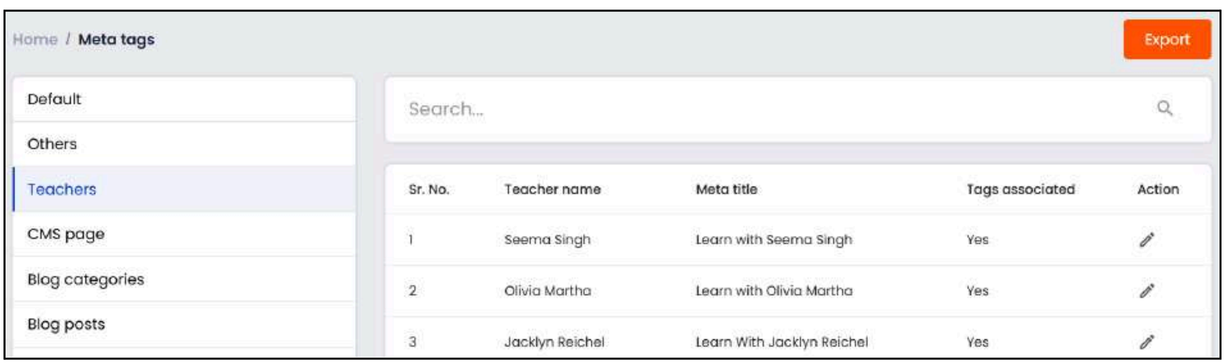
DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

Enter the slug of the page whose meta tags you want to create and fill the rest of the form accordingly.

The list displays the following information—Sr. No., Slug, Meta identifier, and Meta title. Click next to any entry to update its meta tag details. Use to delete the page.

To search for a page from a large list, use the [search bar](#) on top.

- **Teachers**: This lists every teacher's profile page on the platform.

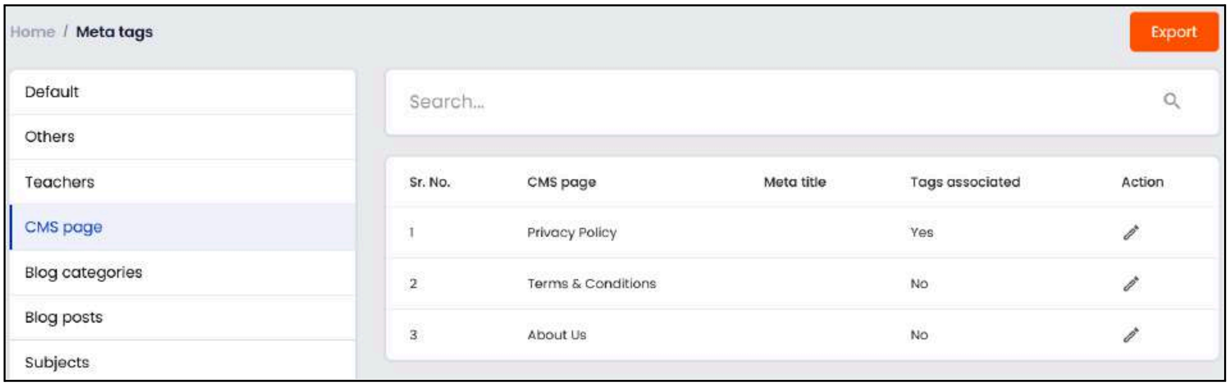


The list displays the following information—Sr. No., Teacher name, Meta title and Tags associated. Click next to the entry to update the meta tag details.

To search for a teacher profile page from a large list, use the [search bar](#) on top.

- **CMS page**: This lists every CMS page you created under **CMS** > [Content pages](#).

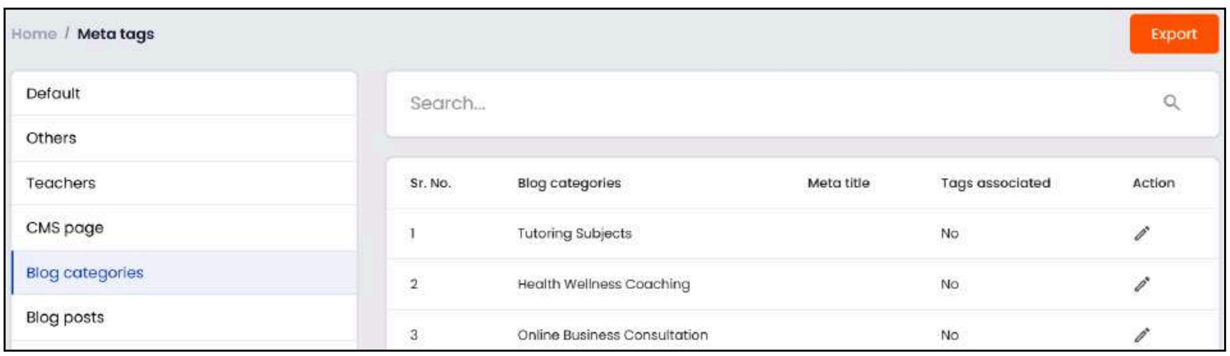
DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.



The list displays the following information—Sr. No., CMS page, Meta title and Tags associated. Click next to the entry to update the meta tag details.

To search for a CMS page from a large list, use the search bar on top.

- **Blog categories**: This category lists all blog category pages on the platform, based on the blog categories created under **Blog** > Blog categories.

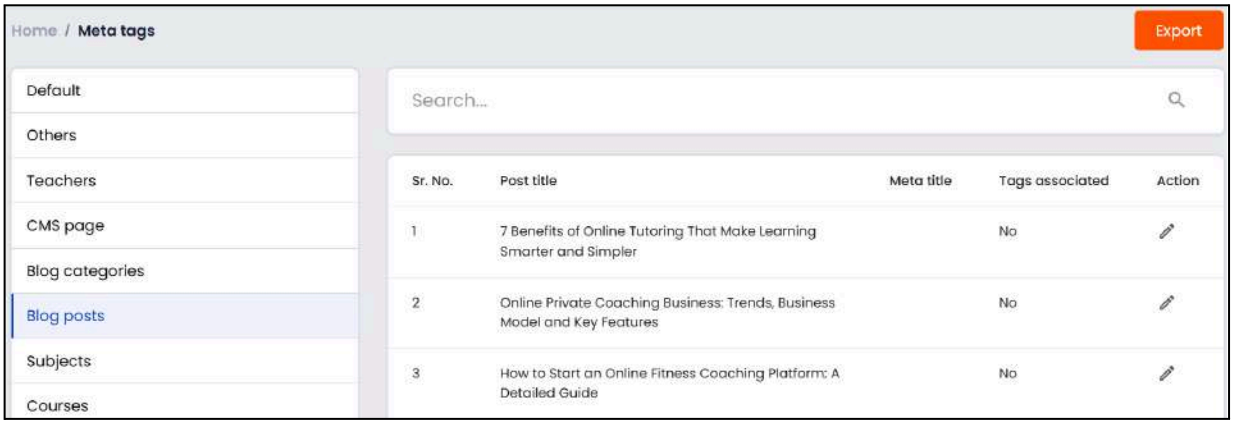


The list displays the following information—Sr. No., Blog categories, Meta title and Tags associated. Click next to the entry to update the meta tag details.

To search for a blog category page from a large list, use the search bar on top.

- **Blog posts**: This category lists all blog post pages created under **Blog** > Blog posts.

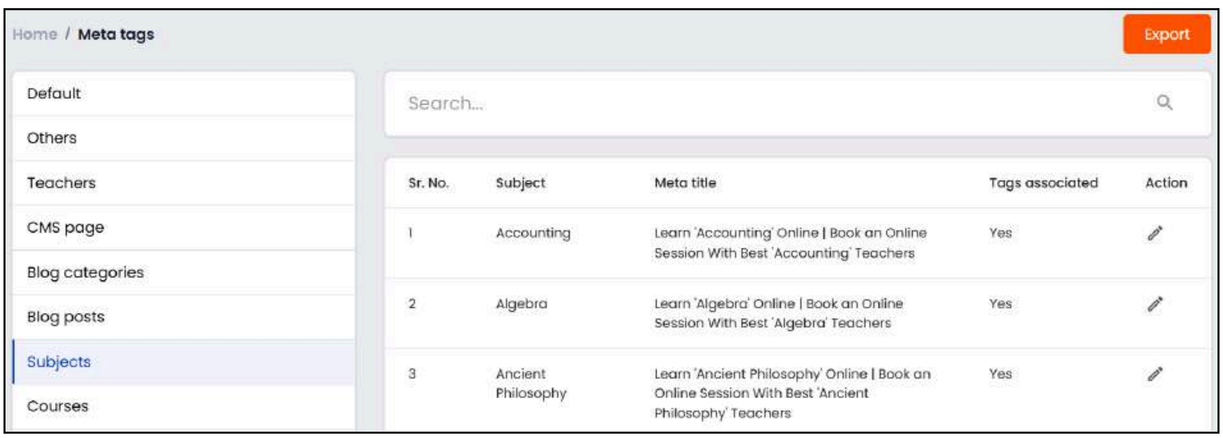
DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.



The list displays the following information—Sr. No., Post title, Meta title and Tags associated. Click next to the entry to update the meta tag details.

To search for a blog post page from a large list, use the search bar on top.

- **Subjects**: This category lists all subject pages on the platform, based on the subjects created under **Teacher preferences** > Teaching subjects.

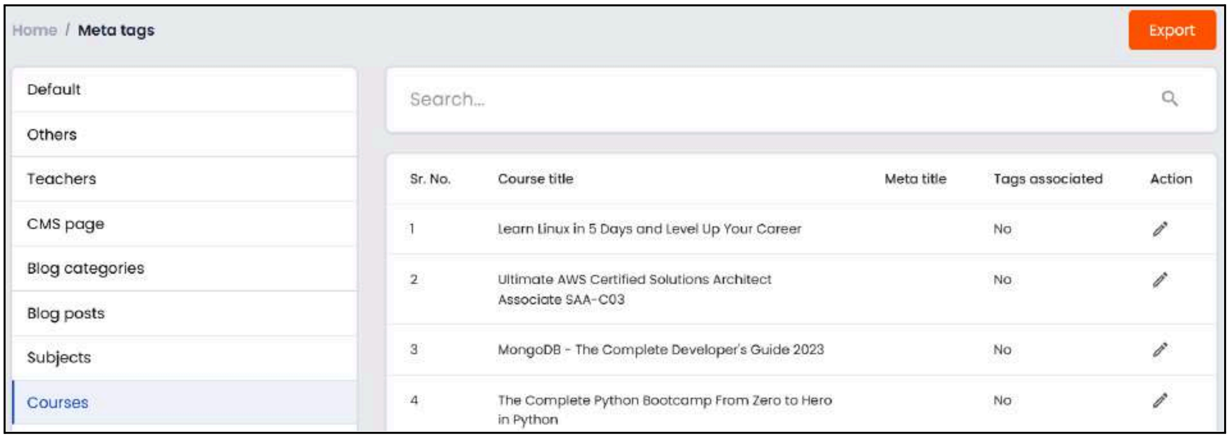


The list displays the following information—Sr. No., Subject, Meta title and Tags associated. Click next to the entry to update the meta tag details.

To search for a subject page from a large list, use the search bar on top.

- **Courses**: This category lists all course pages on the platform, based on the courses created by teachers and as listed under **Courses** > All courses.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

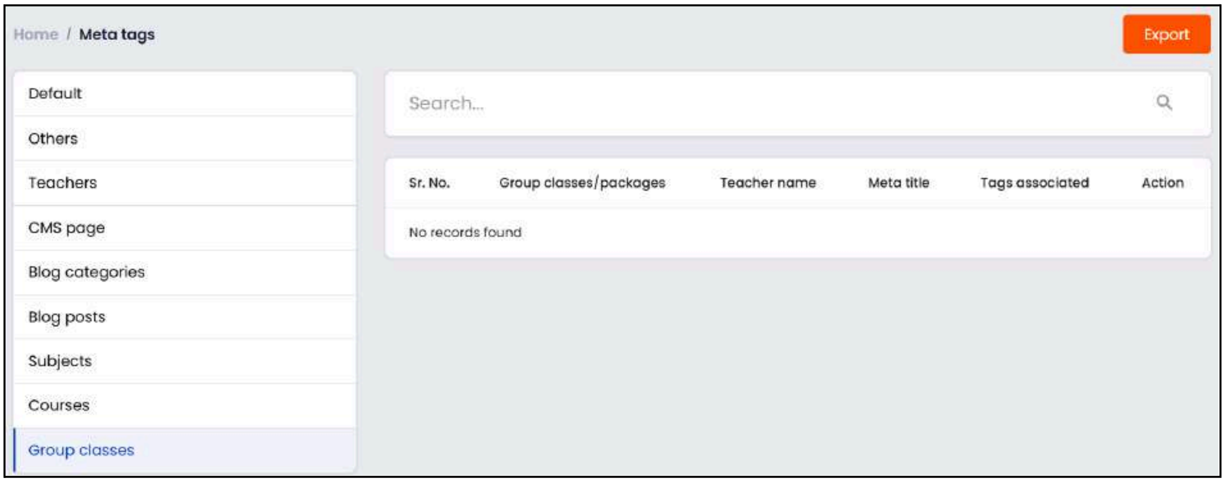


The list displays the following information—Sr. No., Course title, Meta title and Tags associated. Click next to the entry to update the meta tag details.

To search for a course page from a large list, use the search bar on top.

- **Group classes**: This category lists all group class or package group class pages on the platform, based on the group classes scheduled for the future by teachers and as listed under **Group classes** > Group classes and Packages.

The list remains empty if no group classes are scheduled after the current date.



The list displays the following information—Sr. No., Group classes/packages, Meta title and Tags associated. Click next to the entry to update the meta tag details.

To search for a group class page from a large list, use the search bar on top.

Search for a page

All categorized page lists include a search bar at the top—except for the Default list. Use the search bar to quickly find a specific page within the selected category.

Click the search bar or to expand it. Click or the search bar again to collapse the section.

There are several filters that help narrow down the search. Each field is explained below:

- **Keyword:** Enter the meta identifier or meta title of the page.
- **Tags associated:** Click the field and select an option from the dropdown list to filter pages based on whether meta tags have been added. Available options include Does not matter, No, and Yes.

*The **Tags associated** filter is not available for the **Others** page category. Only the **Keyword** field is provided for filtering in that category.*

Export the meta tags data

For each category list, export the meta tag data as needed by clicking 

above the list.

The data is downloaded as a `.csv` file (Comma-Separated Values), which can be used for backups or external purposes.

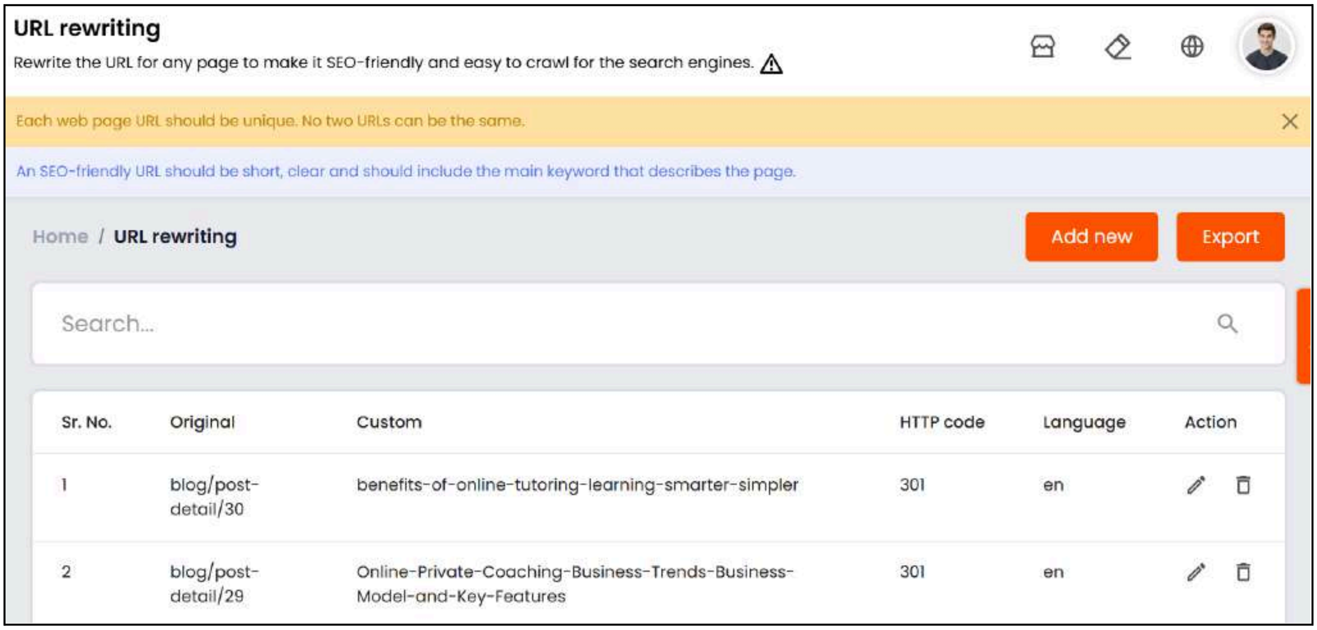
To export data for specific platform users, apply the necessary filters using the search bar (if available), then click **Search** to view the filtered results. Click **Export** to download the data as a `.csv` file.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

13.2 URL rewriting

Create SEO-friendly URLs for web pages to make them easier to remember and easier for search engines to crawl. An SEO-friendly URL includes relevant keywords and avoids random characters or numbers.

Use this submodule to manage all website URLs and ensure they follow the latest SEO guidelines, helping your web pages rank higher in search engine results.



Points to note

- You can only update the **slug** of a page, not the entire URL. A slug is the part of the URL that identifies a specific page in a clean, readable format.

  Example: For a page about yoga for beginners, the full URL might be:

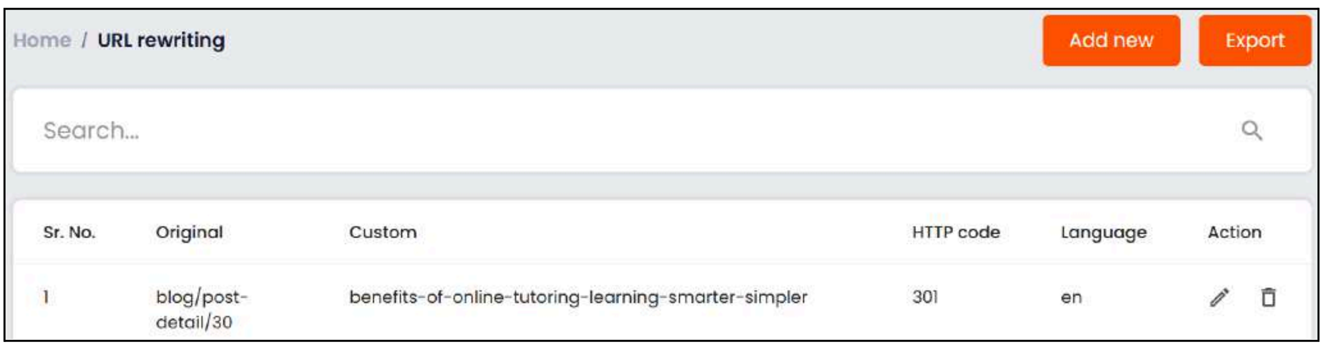
  https://demo.yo-coach.com/yoga-for-beginners

  In this case, *yoga-for-beginners* is the slug. Avoid using slugs like *page?id=1234*, as they are not SEO-friendly.

- Edit the slug by adding relevant keywords, phrases, or words to make it easier to remember and to improve the website's overall SEO.

- Each page must have a unique slug. If you try to assign the same slug to more than one page, the system will display an error and prevent the update.
- Every form on the platform includes an **SEO-friendly URL** field. This allows you to define the SEO-friendly slug while adding new content. When submitted, the corresponding URL is automatically added to the list in this submodule.
- For system-generated URLs that do not yet have an SEO-friendly version, use the **Add** button to include them in the list and rewrite them using appropriate keywords.
- To update an existing SEO-friendly URL, search for it in the list and use the **Edit** button to modify the slug.
- If you delete a URL from the list, only its listing and SEO-friendly slug are removed—the actual web page remains active. In this case, the page will revert to using the default system-generated URL. You can use the **Add** button to re-add the URL and rewrite it to make it SEO-friendly.

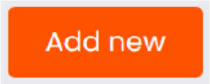
Manage the URL rewriting list



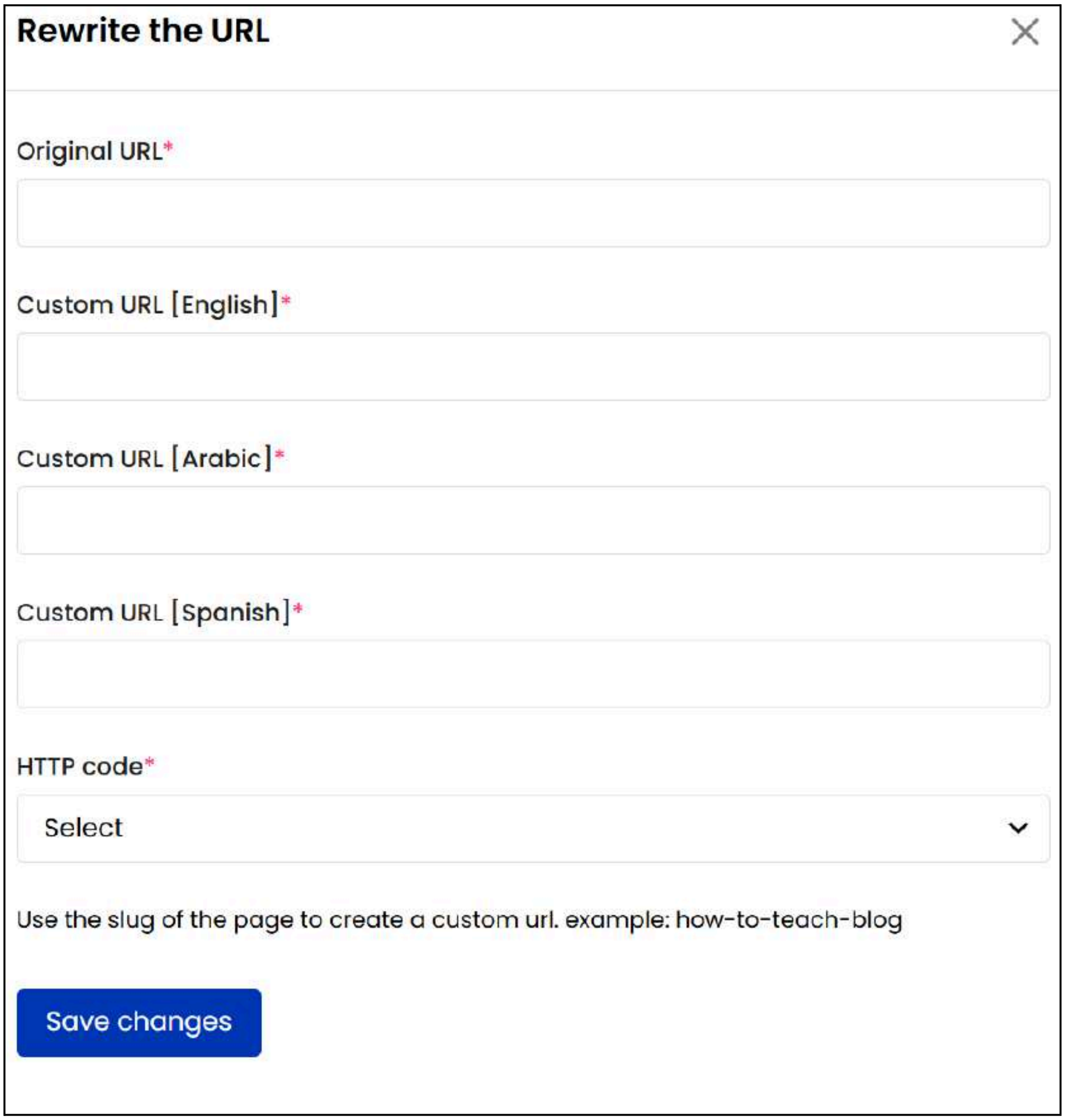
The list displays the following information:

- **Sr. No.:** Serial number
- **Original:** The original system-generated URL path.
- **Custom:** The SEO-friendly version of the URL (also called the slug).
- **HTTP code:** The HTTP status code used for redirection (e.g., 301 for permanent redirect).
- **Language:** The language associated with the custom URL.

Add a custom URL

Click 

in the upper-right corner of the page to open the **Rewrite the URL** form.



Update the following:

- **Original URL*:** Enter the system-generated URL path of the page. For example: blog/post-detail/30. This must be an existing path within the platform.

- **Custom URL [primary language]*:** Enter the slug you want to use for the primary language version of the page.

  A slug is the part of the URL that appears after the domain name.

Example: *how-to-teach-blog* is a slug of the URL →

https://demo.yo-coach.com/how-to-teach-blog.

Only use lowercase letters, numbers, and hyphens (-). Do not include spaces or special characters.

- **Custom URL [secondary language/s]*:** Enter the slug you want to use for the secondary language version of the page.

  Depending on the number of languages available on the platform, there can be multiple secondary language fields. Fill each slug field according to the language shown.

- **HTTP code*:** Click the field and select the redirect type for the custom URL from the dropdown list:
  - 301 – Permanent redirect (recommended for SEO)
  - 302 – Temporary redirect (optional)

Once done, click **Save changes**. With this, the URL is updated and the form closes automatically.

Action buttons

Under the **Action** column, each entry includes two action buttons, allowing you to perform specific actions.

The functions of each button are explained in detail below:

i. Edit

Click this to edit the URL's details. The Rewrite the URL form will appear.

Update the fields, then click **Save changes**.

To close the form, click in the upper-right corner.

ii. Delete

Click this to delete the custom URL entry from the system. A confirmation message will appear.

Click **OK** to confirm the action or **Cancel** to abort it.

When you delete a custom URL entry, the original URL will be used at the front end. You will have to add this URL back in the list again using the add button, if you want to rewrite the URL to make it an SEO-friendly URL.

Search for a URL

Use the search functionality at the top of the list to find a specific URL.

Click the search bar or to expand it. Click or the search bar again to collapse the section.

There are several filters that help narrow down the search. Each field is explained below:

- **Keyword:** Enter the URL slug or a word from the URL slug in this field.
- **Language:** Click the field and select the language of the URL you are searching for.

After filling in the desired fields, click **Search** to display the results. Click **Clear** to reset all fields and start a new search.

Export the URLs data

To export the URLs data from this page, click **Export** from the upper-right corner.

The data will be downloaded as a `.csv` file (Comma-Separated Values), which can be used for backups or external purposes.

A success message will appear once the download is complete.

To export specific URL data, use the [search bar] to apply the necessary filters and define the criteria.

After setting the filters and clicking **Search** to view the results, click **Export** to download the filtered data as a `.csv` file.

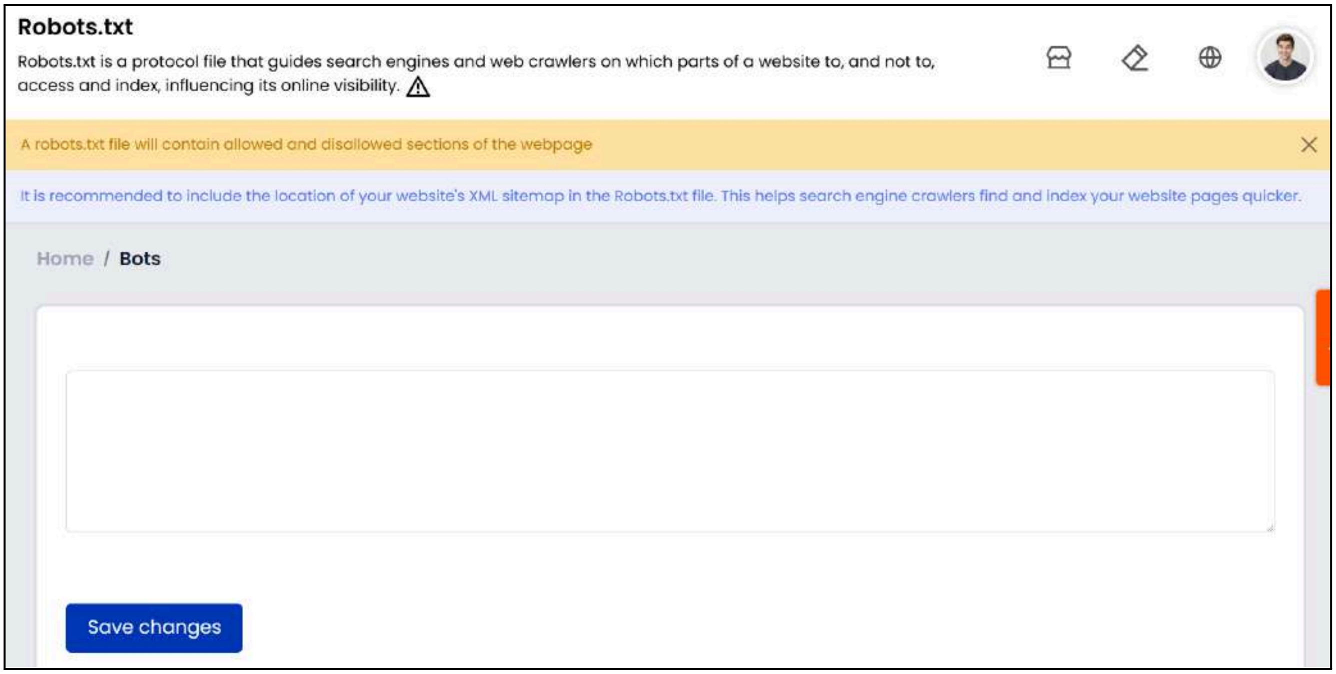
DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

13.3 Robots.txt

The `robots.txt` file is a plain text file that guides search engine bots and other web crawlers on which parts of the website they are allowed or not allowed to access.

By properly configuring this file, you can control how search engines index your content, helping you protect sensitive sections of the site and optimize search visibility for important pages.

This section allows you to edit the content of the `robots.txt` file directly from the admin interface.



Purpose of the robots.txt file

- **Allow** access to public pages that should be indexed by search engines.
- **Disallow** access to private or system-related sections that should not appear in search results.
- **Specify the location of your sitemap** to help search engines crawl your website more efficiently.

Incorrect settings in the `robots.txt` file can block search engines from indexing critical areas of your website. Always verify the rules before saving changes.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

Enter the robots.txt file content in the field provided. It is basically the rules that define which paths bots can access or are restricted from accessing in the field provided. Follow the correct format to ensure bots interpret the file correctly.

Example robots.txt content:

```
User-agent: *
Disallow: /admin/
Disallow: /checkout/
Allow: /blog/
Allow: /courses/
Sitemap: https://demo.yo-coach.com/sitemap.xml
```

This example does the following:

- Blocks all crawlers from accessing `/admin/` and `/checkout/`
- Allows access to `/blog/` and `/courses/`
- Provides the sitemap location to support better indexing

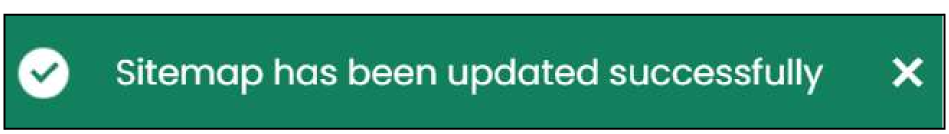
After updating the field, click **Save changes**. The updated `robots.txt` file will be immediately available at: *https://demo.yo-coach.com/robots.txt*

13.4 Update sitemap

Sitemap is a file or document that holds information about the various different web pages included on the website and the relationship that these pages have between them. It has information regarding what pages are made available to the public and what pages are just available to the developers.

This file eases the process of navigation through the website for all the search engines including Google. In short, it helps in the Search Engine Optimization (SEO).

To update the sitemap, click **this option** under the **SEO** module in the left navigation panel. The system will automatically regenerate the sitemap and display a confirmation message when the update is successful.



DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

13.5 XML sitemap

Click this submodule to generate the website sitemap. The sitemap opens in XML format in a new browser tab, as shown below.

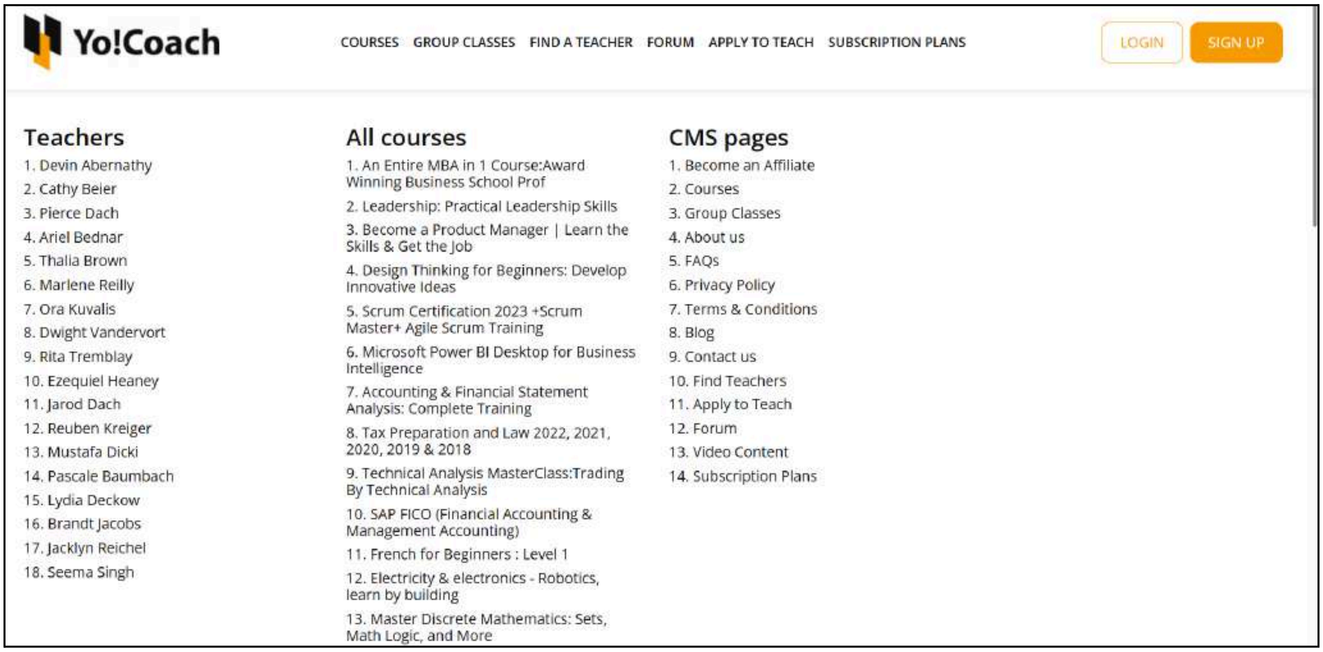
This XML file does not appear to have any style information associated with it. The document tree is shown below.


```
▼<sitemapindex xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xmlns="http://www.sitemaps.org/schemas/sitemap/0.9"
 xsi:schemaLocation="http://www.sitemaps.org/schemas/sitemap/0.9 http://www.sitemaps.org/schemas/sitemap/0.9/siteindex.xsd">
  ▼<sitemap>
     <loc>https://elearning.yo-coach.com/sitemap/list_1.xml</loc>
   </sitemap>
 </sitemapindex>
```


This file lists the main sitemap locations of the website and helps search engines discover the key sections efficiently.

13.6 HTML sitemap

Click this submodule to generate the website sitemap in HTML format. The sitemap opens in a new browser tab.



This page displays a complete hierarchical view of all the web pages on the website, making it easy for users to navigate the site structure.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

14. Reports

Use the Reports module to analyze the overall performance of the portal. This module provides insights into key metrics such as sales progress, session statistics, and other performance indicators.

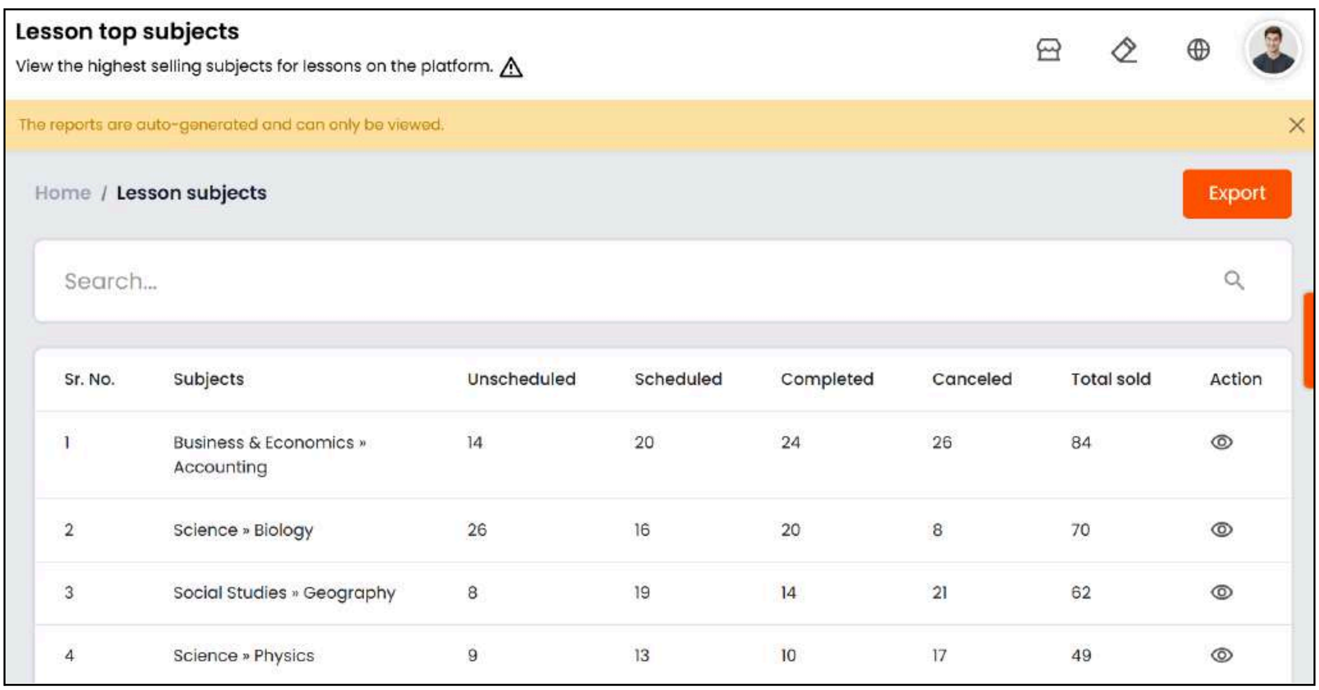
The module is divided into specific report categories, including Lesson top subjects, Class top subjects, Teacher performance, Lesson stats and more—helping you track trends and make informed decisions based on real-time data.

Expand this module to view the submodules. Then, click the submodule to visit their respective pages.

Each submodule is explained in detail.

14.1 Lesson top subjects

Use this submodule to track the highest-selling subjects for lessons on the platform. The list helps you evaluate which subjects are most in demand, based on the total number of lessons sold. Subjects are displayed in descending order, with the subject having the highest total sales shown at the top.



DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

This page is view-only and displays auto-generated reports that cannot be manually edited.

The list will be empty if you just bought the platform and didn't choose to have dummy content provided by FATbit during the platform installation.

Manage the lesson top subjects list

The following details are shown in the list:

- **Sr. No.:** The serial number.
- **Subjects:** The subject name (along with the parent subject it falls under the subject hierarchy) as created under **Teacher preferences** > Teaching subjects.
- **Unscheduled:** The number of lessons sold that have not yet been scheduled.
- **Scheduled:** The number of lessons that are scheduled but not yet completed.
- **Completed:** The number of lessons that have been completed successfully.
- **Canceled:** The number of lessons that were sold but later canceled.
- **Total sold:** The total number of lessons sold for the subject. This is the sum of all unscheduled, scheduled, completed, and canceled lessons.

Action button

There is a single action button next to each entry—**View** .

Click this button to view the Lesson orders for the selected subject. This page displays all lesson orders related to that subject.

Refer to the Lesson orders section to learn more about the details available on that page.

Once done, navigate back to the Lesson top subjects page by selecting the submodule from the navigation panel.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

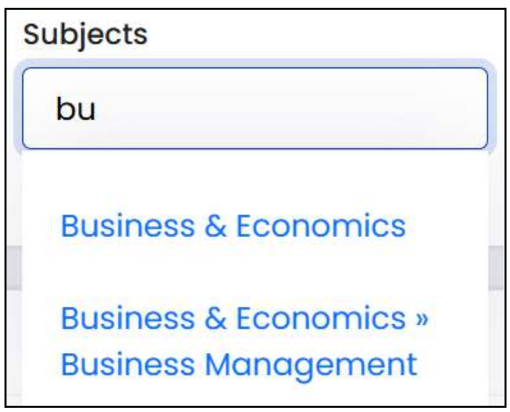
Search for a subject's report

Use the search functionality at the top of the list to find a specific subject's report.

Click the search bar or to expand it. Click or the search bar again to collapse the section.

There are several filters that help narrow down the search. Each field is explained below:

- **Subjects:** Enter the subject's name in this field. Place the cursor in the field and start typing. As you type, a list of matching results will appear—select the appropriate option.



- **Date range: From:** To view the report of a specific date, select the desired date in this field.

  To filter the report of a date range, select the start date by clicking the field. A calendar will appear; choose the date, and it will be added to the field.

  Use the **Today** button to select today's date and **Ok** to close the calendar.

- **Date range: To:** Select the ending date of the range in this field.

  *The **Date range: From** value must always be an earlier date, and the **Date range: To** value must be later than the date selected in the **Date range: From** field.*

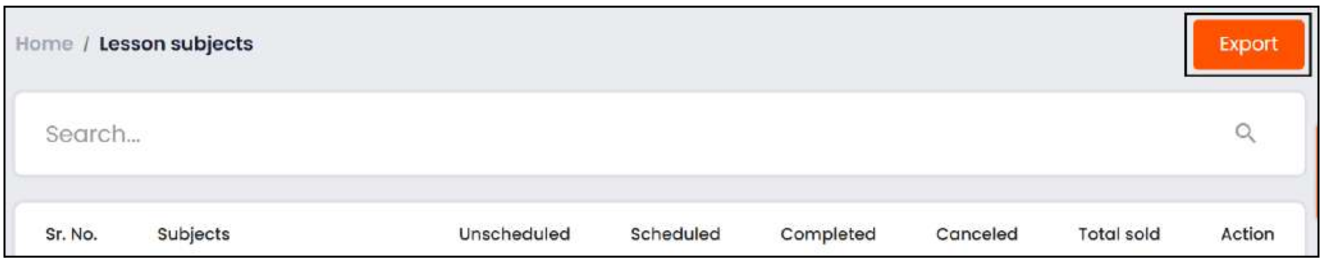
*For example, if the **Date range: From** is 09/24/2020, the **Date range: To** must be a date after this, such as 09/25/2020 or any future date. If incorrect dates are entered, no results will be displayed in the list.*

Search for a report by filling in a single field or multiple fields. To view the report of a specific date range, use the date fields.

After filling in the desired fields, click **Search** to display the results. Click **Clear** to reset all fields and start a new search.

Export the lesson top subjects report data

To export the lesson top subjects report data from this page, click **Export** from the upper-right corner.



The data will be downloaded as a `.csv` file (Comma-Separated Values), which can be used for backups or external purposes.

A success message will appear once the download is complete.

To export a specific part of the report, use the [search bar](#) to apply the necessary filters and define the criteria.

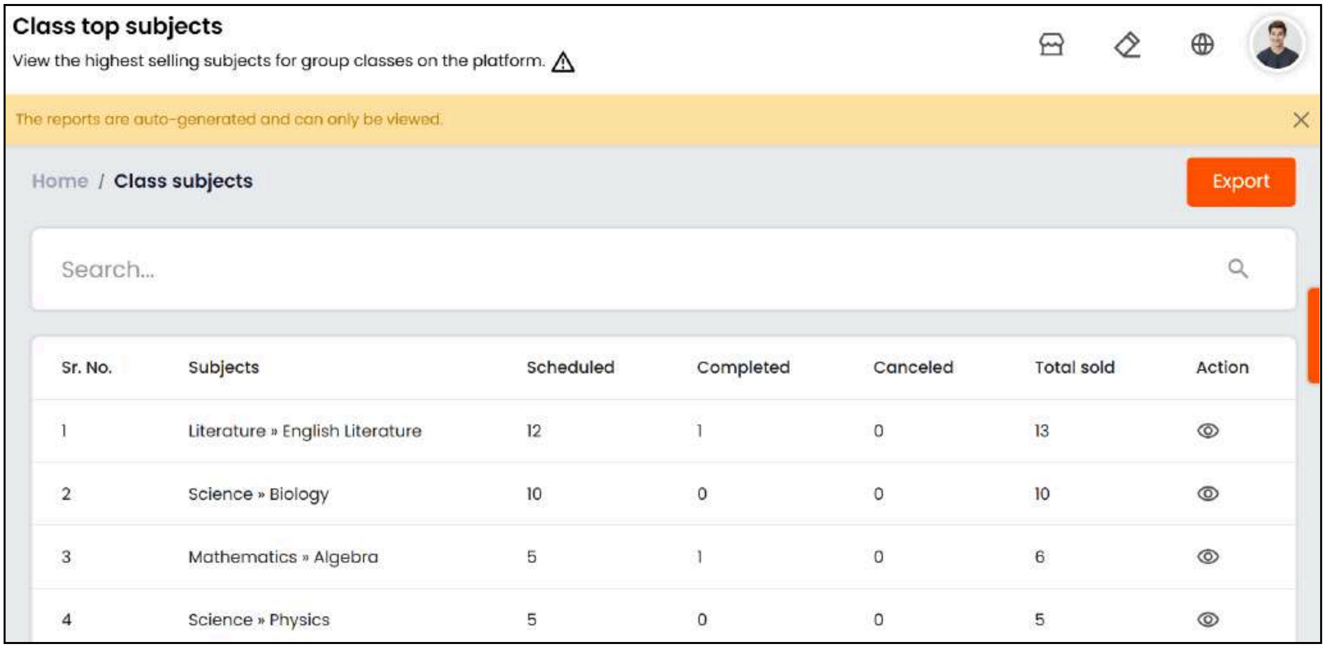
After setting the filters and clicking **Search** to view the results, click **Export** to download the filtered data as a `.csv` file.

<u>**DISCLAIMER:**</u> The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

14.2 Class top subjects

Use this sub-module to track the highest-selling subjects for group classes on the platform. The list helps you assess which subjects are most popular among learners based on the total number of classes sold. Subjects are arranged in descending order, with the one having the highest total sales shown at the top.

This data allows you to identify trends in learner demand and make informed decisions regarding class offerings.



The list will be empty if you just bought the platform and didn't choose to have dummy content provided by FATbit during the platform installation.

Manage the class top subjects list

The following details are shown in the list:

- **Sr. No.:** The serial number.
- **Subjects:** The subject name (along with the parent subject it falls under the subject hierarchy) as created under **Teacher preferences** > [Teaching subjects](#).
- **Scheduled:** The number of classes that are scheduled but not yet completed.
- **Completed:** The number of classes that have been completed successfully.

- **Canceled:** The number of classes that were sold but later canceled.
- **Total sold:** The total number of classes sold for the subject. This is the sum of all scheduled, completed, and canceled group classes.

Action button

There is a single action button next to each entry—**View** .

Click this button to view the Group class orders for the selected subject. This page displays all group class orders related to that subject.

Refer to the Group class orders section to learn more about the details available on that page.

Once done, navigate back to the Class top subjects page by selecting the submodule from the navigation panel.

Search for a subject's report

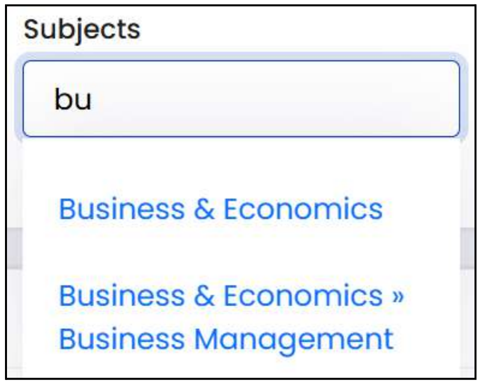
Use the search functionality at the top of the list to find a specific subject's report.

Click the search bar or to expand it. Click or the search bar again to collapse the section.

There are several filters that help narrow down the search. Each field is explained below:

- **Subjects:** Enter the subject's name in this field. Place the cursor in the field and start typing. As you type, a list of matching results will appear—select the appropriate option.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.



- **Date range: From:** To view the report of a specific date, select the desired date in this field.

  To filter the report of a date range, select the start date by clicking the field. A calendar will appear; choose the date, and it will be added to the field. Use the **Today** button to select today's date and **Ok** to close the calendar.

- **Date range: To:** Select the ending date of the range in this field.

  *The **Date range: From** value must always be an earlier date, and the **Date range: To** value must be later than the date selected in the **Date range: From** field.*

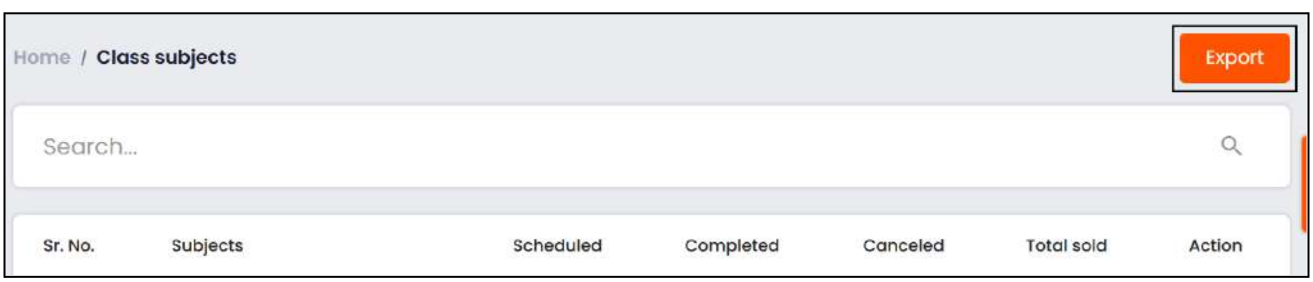
  *For example, if the **Date range: From** is 09/24/2020, the **Date range: To** must be a date after this, such as 09/25/2020 or any future date. If incorrect dates are entered, no results will be displayed in the list.*

Search for a report by filling in a single field or multiple fields. To view the report of a specific date range, use the date fields.

After filling in the desired fields, click **Search** to display the results. Click **Clear** to reset all fields and start a new search.

Export the class top subjects report data

To export the class top subjects report data from this page, click **Export** from the upper-right corner.



<u>**DISCLAIMER:**</u> The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

The data will be downloaded as a `.csv` file (Comma-Separated Values), which can be used for backups or external purposes.

A success message will appear once the download is complete.

To export a specific part of the report, use the [search bar] to apply the necessary filters and define the criteria.

After setting the filters and clicking **Search** to view the results, click **Export** to download the filtered data as a `.csv` file.

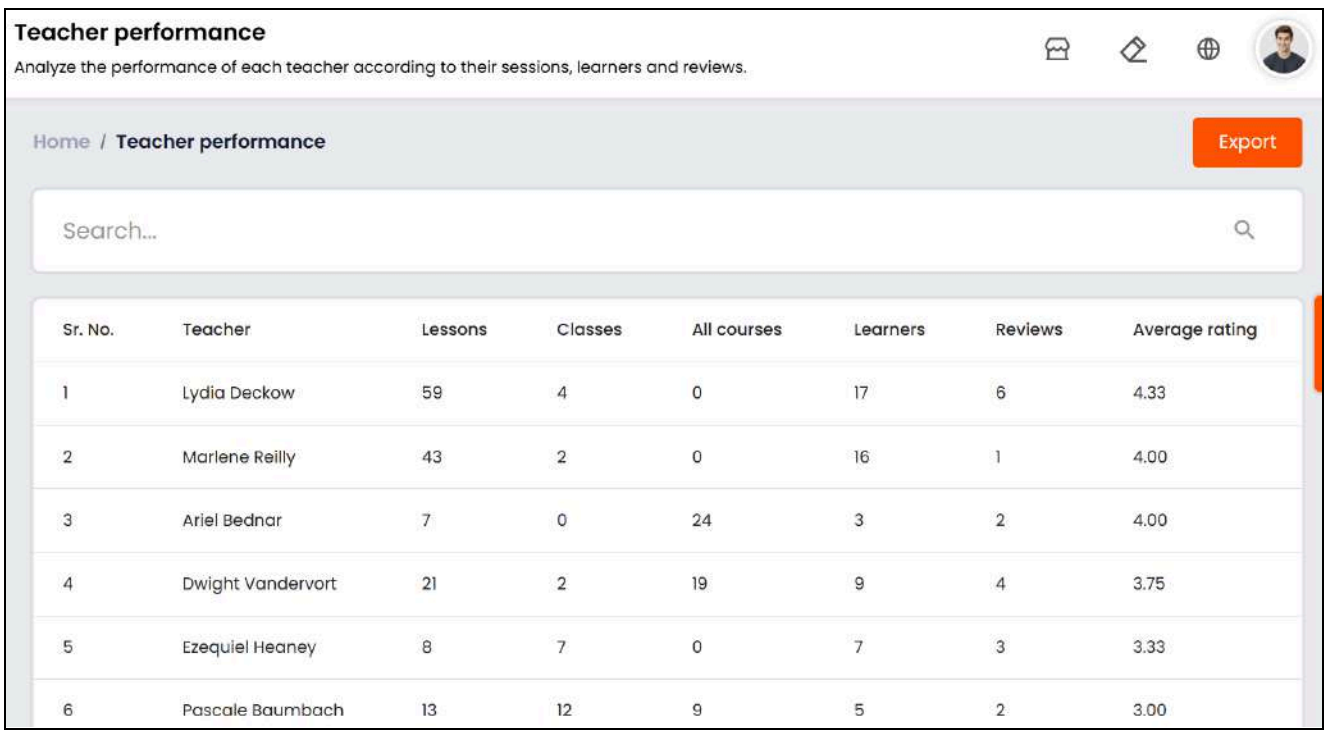
14.3 Teacher performance

Use this sub-module to analyze the performance of teachers registered on the platform. The page displays a ranked list of all teachers, arranged in descending order based on key performance indicators.

Teachers are sorted using the following criteria:

1. **Ratings** – Teachers with the highest average ratings appear at the top.
2. **Learners** – If ratings are the same, the number of unique learners is considered.
3. **Lessons sold** – If both ratings and learner count are the same, the total number of lessons sold is used for sorting.

This report helps you monitor teaching effectiveness and learner engagement across the platform.


Teacher performance
Analyze the performance of each teacher according to their sessions, learners and reviews.
Home / Teacher performance
Export
Search...

Sr. No.	Teacher	Lessons	Classes	All courses	Learners	Reviews	Average rating
1	Lydia Deckow	59	4	0	17	6	4.33
2	Marlene Reilly	43	2	0	16	1	4.00
3	Ariel Bednar	7	0	24	3	2	4.00
4	Dwight Vandervort	21	2	19	9	4	3.75
5	Ezequiel Heaney	8	7	0	7	3	3.33
6	Pascale Baumbach	13	12	9	5	2	3.00

The list will be empty if you just bought the platform and didn't choose to have dummy content provided by FATbit during the platform installation.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

Manage the teacher performance list

The following details are shown in the list:

- **Sr. No.:** The serial number.
- **Teacher:** The name of the teacher. Manage all the teachers on the platform under Users > [Platform users].
- **Lessons:** The total number of one-on-one lessons the teacher has sold.
- **Classes:** The number of group classes the teacher has conducted.
- **All Courses:** The number of course packages (self-paced or structured) associated with the teacher.
- **Learners:** The total number of unique learners who have booked sessions with the teacher.
- **Reviews:** The number of feedback entries submitted by learners for the teacher.
- **Average rating:** The teacher's average rating, calculated based on the reviews received.

Search for a teacher's performance report

Use the search functionality at the top of the list to find a specific teacher's performance report.

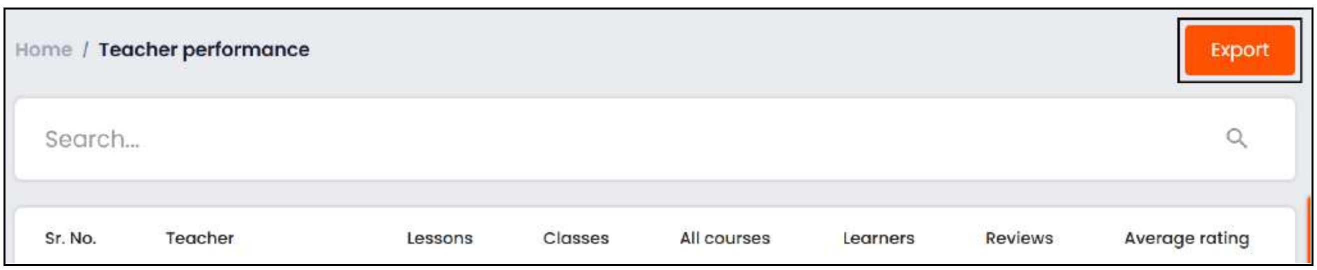
Click the search bar or to expand it. Click or the search bar again to collapse the section.

Enter the teacher's name in the **User** field. Place the cursor in the field and start typing. As you type, a list of matching results will appear—select the appropriate option.

Once done, click **Search** to get the results. Click **Clear** to reset the field and start a new search.

Export the teacher performance report data

To export the teacher performance report data from this page, click **Export** from the upper-right corner.



The data will be downloaded as a `.csv` file (Comma-Separated Values), which can be used for backups or external purposes. A success message will appear once the download is complete.

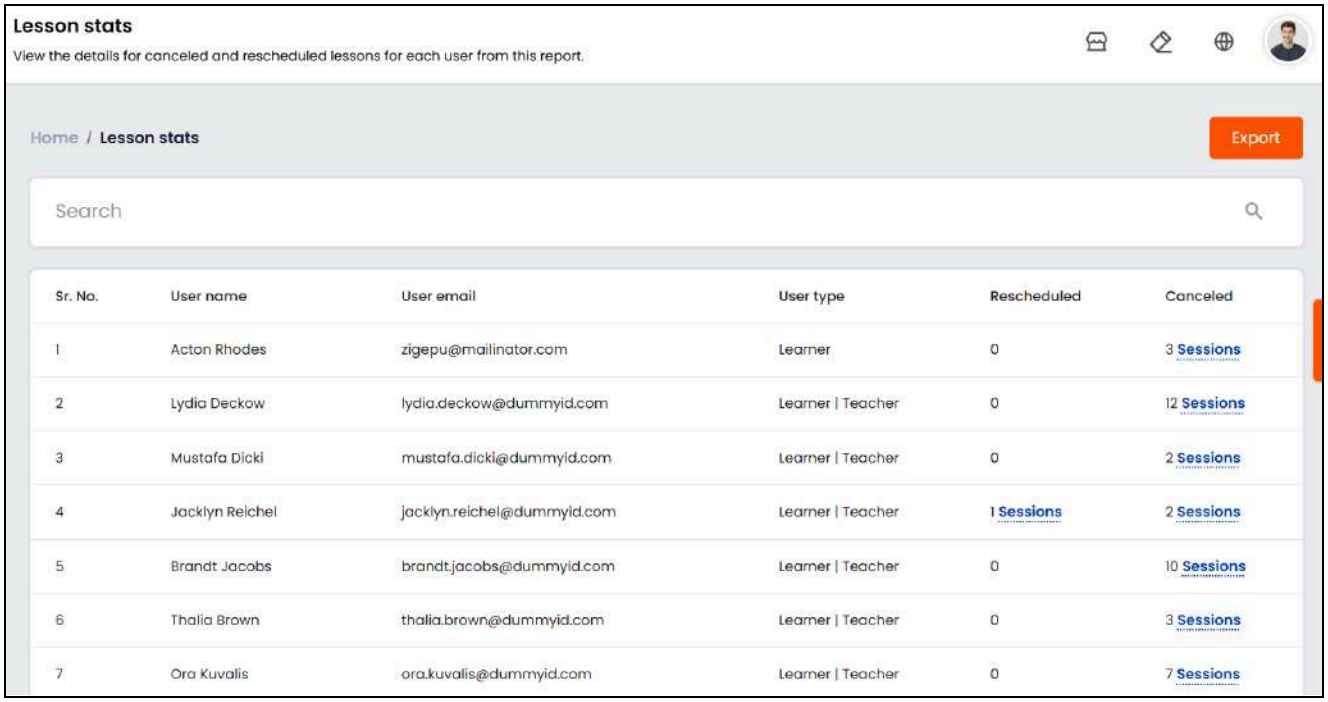
To export a specific part of the report, use the [search bar](#) to apply the necessary filters and define the criteria.

After setting the filters and clicking **Search** to view the results, click **Export** to download the filtered data as a `.csv` file.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

14.4 Lesson stats

Use this sub-module to track user-specific lesson activity related to rescheduling and cancellations. This report helps identify users who frequently cancel or reschedule lessons, allowing you to monitor patterns and intervene if necessary.



The list displays all learners and teachers who have canceled or rescheduled lessons, arranged in descending order by the number of cancellations. You can review each user's lesson history and take appropriate action if needed.

The list will be empty if you just bought the platform and didn't choose to have dummy content provided by FATbit during the platform installation.

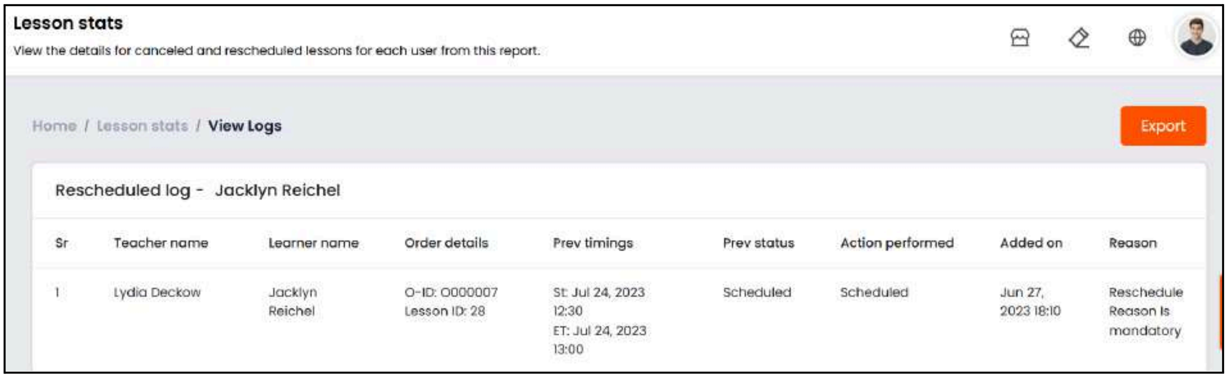
Manage the lesson stats list

The following details are shown in the list:

- **Sr. No.:** The serial number.
- **User name:** The full name of the user.
- **User email:** The registered email address of the user.
- **User type:** This indicates whether the user is a Learner, Teacher, or both.

- **Rescheduled:** This displays the total number of lessons the user has rescheduled.

  Click the **Sessions** link to open the **Rescheduled Log – [User Name]** window.

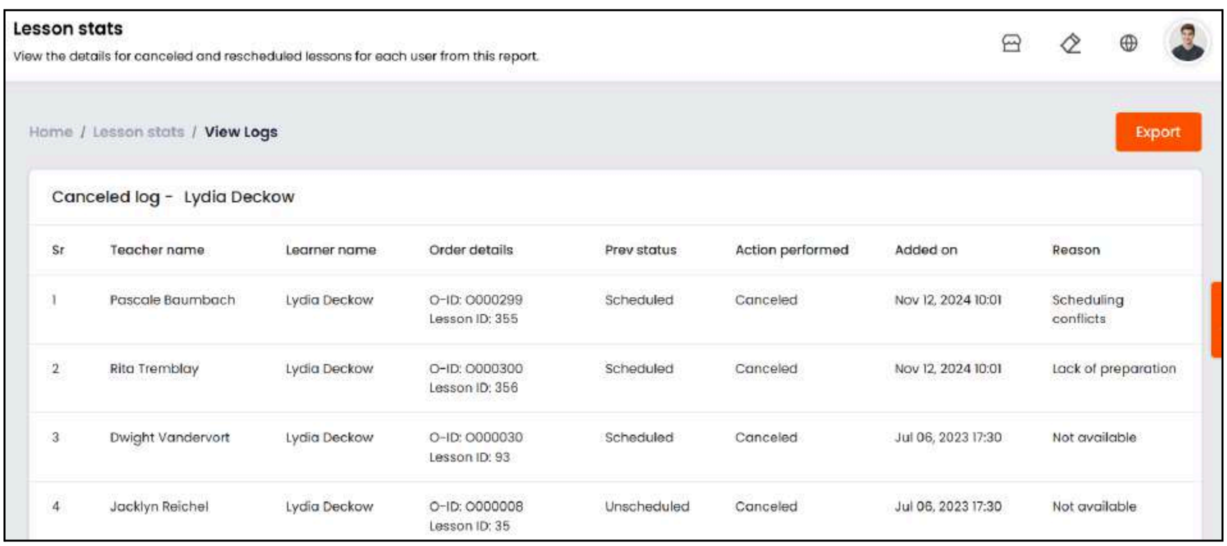


  This log displays the following details for each rescheduled lesson—Teacher name and learner name, Order details, Previous scheduled time and estimate time, Previous lesson status, Action taken (e.g., rescheduled), Date and time of the reschedule request, and Reason for rescheduling.

  You can click **Export** to download this data in a `.csv` file.

- **Canceled:** This displays the number of lessons canceled by the user.

  Click the **Sessions** link to open the **Canceled Log – [User Name]** window.



  This log displays the following details for each canceled lesson—Teacher name and learner name, Order details, Previous lesson status (Scheduled or Unscheduled), Action taken (e.g., canceled), Date and time of the cancellation request, and Reason for cancellation.

  You can click **Export** to download this data in a `.csv` file.

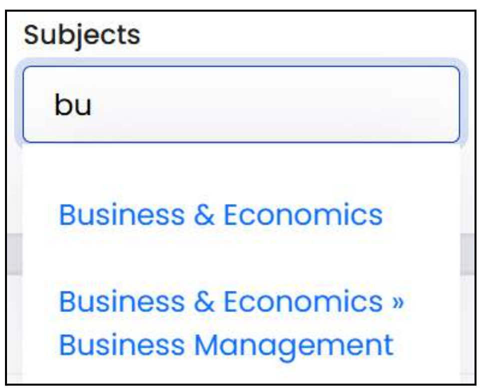
Search for a lesson's stat report

Use the search functionality at the top of the list to find a specific lesson's stat report.

Click the search bar or to expand it. Click or the search bar again to collapse the section.

There are several filters that help narrow down the search. Each field is explained below:

- **Subjects:** Enter the subject's name in this field. Place the cursor in the field and start typing. As you type, a list of matching results will appear—select the appropriate option.



- **Date range: From:** To view the report of a specific date, select the desired date in this field.

  To filter the report of a date range, select the start date by clicking the field. A calendar will appear; choose the date, and it will be added to the field. Use the **Today** button to select today's date and **Ok** to close the calendar.

- **Date range: To:** Select the ending date of the range in this field.

  *The **Date range: From** value must always be an earlier date, and the **Date range: To** value must be later than the date selected in the **Date range: From** field.*

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

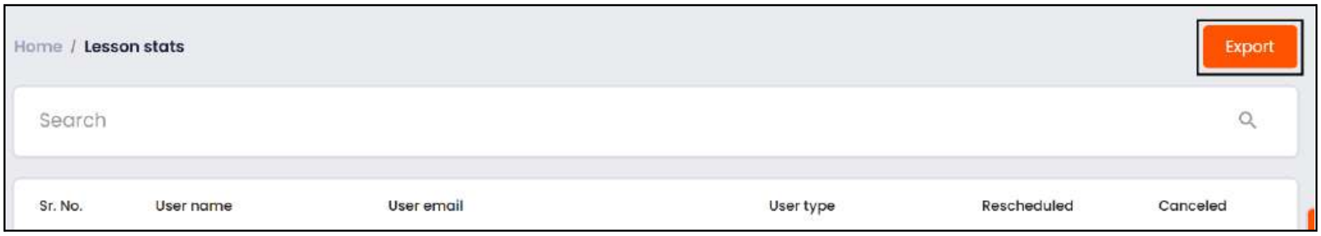
*For example, if the **Date range: From** is 09/24/2020, the **Date range: To** must be a date after this, such as 09/25/2020 or any future date. If incorrect dates are entered, no results will be displayed in the list.*

Search for a report by filling in a single field or multiple fields. To view the report of a specific date range, use the date fields.

After filling in the desired fields, click **Search** to display the results. Click **Clear** to reset all fields and start a new search.

Export the lesson stats report data

To export the lesson stats report data from this page, click **Export** from the upper-right corner.



The data will be downloaded as a `.csv` file (Comma-Separated Values), which can be used for backups or external purposes.

A success message will appear once the download is complete.

To export a specific part of the report, use the [search bar](#) to apply the necessary filters and define the criteria.

After setting the filters and clicking **Search** to view the results, click **Export** to download the filtered data as a `.csv` file.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
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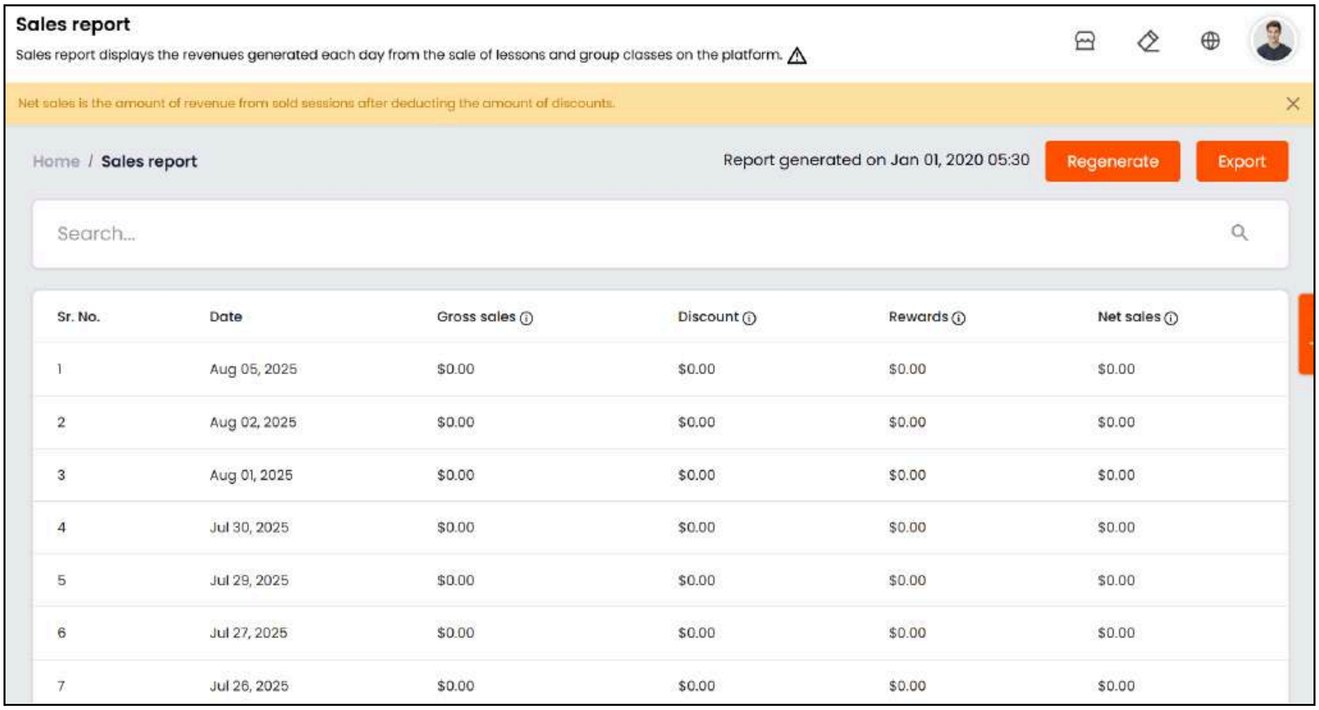
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

14.5 Sales report

Use this sub-module to view the daily revenue generated from the sale of lessons, group classes, and courses on the platform. The report provides a clear breakdown of gross and net earnings along with any deductions from discounts or reward redemptions.



Entries are listed in reverse chronological order, with the most recent sales appearing at the top.

This report helps you track sales trends and review how discounts or rewards impact final revenue.

The list will be empty if you just bought the platform and didn't choose to have dummy content provided by FATbit during the platform installation.

Manage the sales report list

The list displays the following information:

- **Serial number:** The serial number.

- **Date:** The calendar date for which the sales data is calculated.
- **Gross sales:** The total revenue earned from all lessons, group classes, and courses sold on that date—before any deductions.
- **Discount:** The total amount of discounts applied on purchases for that date.
- **Rewards:** The value of rewards redeemed by users at checkout, such as loyalty points used to reduce the total payable amount.
- **Net sales:** The actual revenue generated after subtracting discounts and reward-based deductions from the gross sales.

  Net sales is the final revenue collected after all applicable discounts and rewards have been deducted from the gross amount.

Click ⓘ beside any heading from Gross sales to Net sales to know more about the information added under the respective column.

Regenerate

Click the **Regenerate** button in the upper-right corner to refresh the report and fetch the latest sales data. This ensures the list reflects the most up-to-date transactions on the platform.

Just beside the button, you can view the timestamp of the last report generation.

This note indicates when the sales report was last updated and helps you confirm whether regeneration is needed to display the latest information.

Search for a specific time-period's sales report

Use the search functionality at the top of the list to find a specific time-period's sales report.

Click the search bar or to expand it. Click or the search bar again to collapse the section.

There is a date range filter that helps narrow down the search. Fill the accordingly:

- **Date range: From:** To view the report of a specific date, select the desired date in this field.

  To filter the report of a date range, select the start date by clicking the field. A calendar will appear; choose the date, and it will be added to the field.

  Use the **Today** button to select today's date and **Ok** to close the calendar.

- **Date range: To:** Select the ending date of the range in this field.

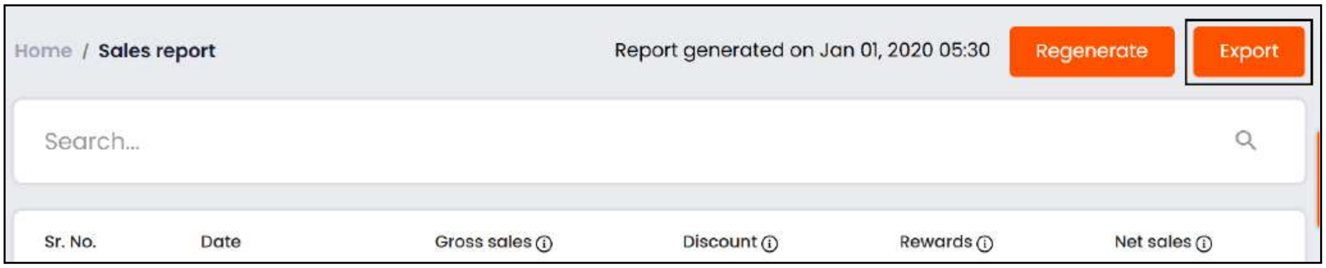
  *The **Date range: From** value must always be an earlier date, and the **Date range: To** value must be later than the date selected in the **Date range: From** field.*

  *For example, if the **Date range: From** is 09/24/2020, the **Date range: To** must be a date after this, such as 09/25/2020 or any future date. If incorrect dates are entered, no results will be displayed in the list.*

After filling in the desired fields, click **Search** to display the results. Click **Clear** to reset all fields and start a new search.

Export the sales report data

To export the sales report data from this page, click **Export** from the upper-right corner.



The data will be downloaded as a `.csv` file (Comma-Separated Values), which can be used for backups or external purposes.

A success message will appear once the download is complete.

To export a specific part of the report, use the [search bar]() to apply the necessary filters and define the criteria.

After setting the filters and clicking **Search** to view the results, click **Export** to download the filtered data as a `.csv` file.

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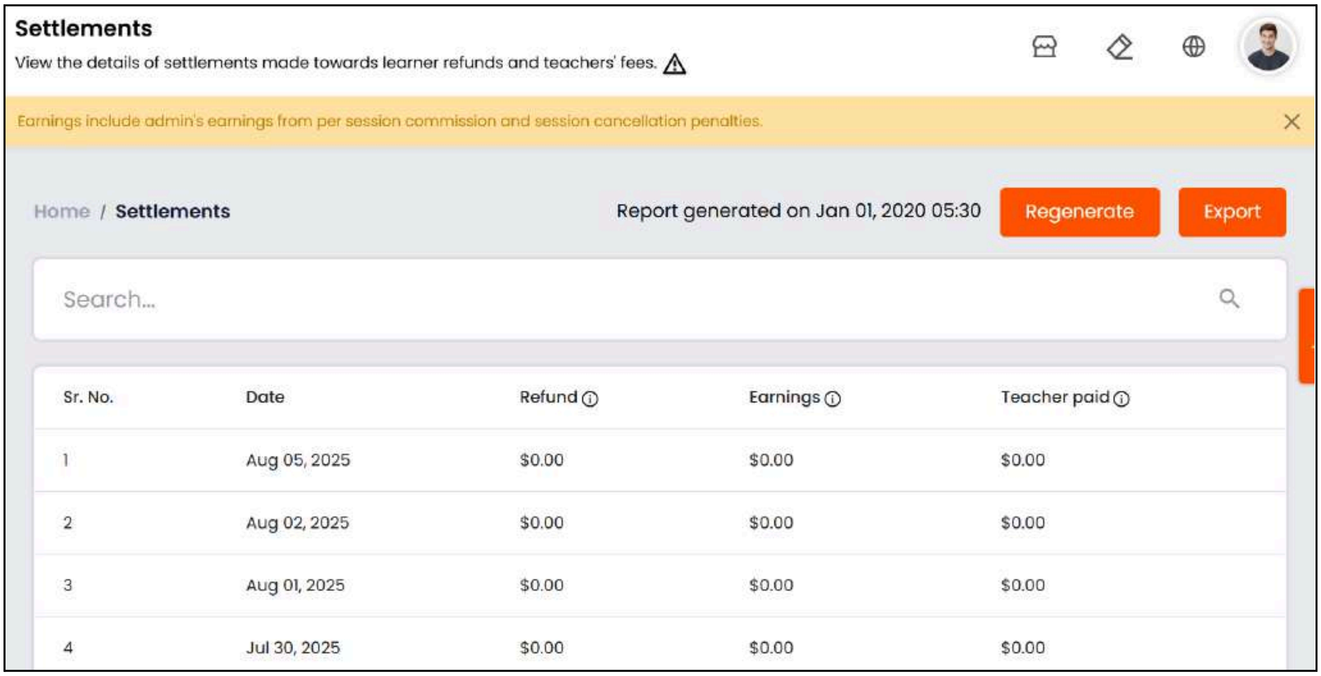
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

14.6 Settlements

Use this sub-module to analyze the settlement details related to learner refunds, admin earnings, and teacher payments. The report helps track all monetary distributions on a daily basis and ensures transparency across platform transactions.



All entries are listed in reverse chronological order, showing the most recent dates first. The report provides a breakdown of refunds processed, platform earnings, and payments made to teachers for each listed day.

The list will be empty if you just bought the platform and didn't choose to have dummy content provided by FATbit during the platform installation.

Manage the settlement report list

The following information is displayed in the list:

- **Sr. No.:** The serial number.
- **Date:** The date when the settlement was made.

- **Refund:** The total amount refunded to learners for that specific day. Refunds may be processed due to canceled sessions or in response to reported issues.

- **Earnings:** Your earnings for the day.

  This value includes commissions collected from each session, course, or class, and is calculated using the following formula: **Earnings = Admin's commission per session – (Session refunds + Coupon discounts + Reward discounts)**

  Earnings include commissions collected per session and applicable penalties for session cancellations.

- **Teacher paid:** The total amount paid to teachers on that date for completed sessions.

  The value is calculated using the following formula: **Teacher's Payment = Session amount – (Admin's commission + Session refunds to learners)**

Click ⓘ beside any heading from Refund to Teacher paid to know more about the information added under the respective column.

Regenerate

Click the **Regenerate** button in the upper-right corner to refresh the settlements report and retrieve the latest available data. This ensures that the page reflects any recent updates to earnings, refunds, or teacher payments.

Next to the Regenerate button, the **report generation timestamp** shows the last time the settlement data was updated. Use this reference to confirm whether the data is current or if regeneration is needed.

Search for a specific time-period's settlement report

Use the search functionality at the top of the list to find a specific time-period's settlement report.

Click the search bar or to expand it. Click or the search bar again to collapse the section.

There is a date range filter that helps narrow down the search. Fill the accordingly:

- **Date range: From:** To view the report of a specific date, select the desired date in this field.

  To filter the report of a date range, select the start date by clicking the field. A calendar will appear; choose the date, and it will be added to the field.

  Use the **Today** button to select today's date and **Ok** to close the calendar.

- **Date range: To:** Select the ending date of the range in this field.

  *The **Date range: From** value must always be an earlier date, and the **Date range: To** value must be later than the date selected in the **Date range: From** field.*

  *For example, if the **Date range: From** is 09/24/2020, the **Date range: To** must be a date after this, such as 09/25/2020 or any future date. If incorrect dates are entered, no results will be displayed in the list.*

After filling in the desired fields, click **Search** to display the results. Click **Clear** to reset all fields and start a new search.

Export the settlement report data

To export the settlement report data from this page, click **Export** from the upper-right corner.

__DISCLAIMER:__ The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

The data will be downloaded as a `.csv` file (Comma-Separated Values), which can be used for backups or external purposes.

A success message will appear once the download is complete.

To export a specific part of the report, use the [search bar](#) to apply the necessary filters and define the criteria.

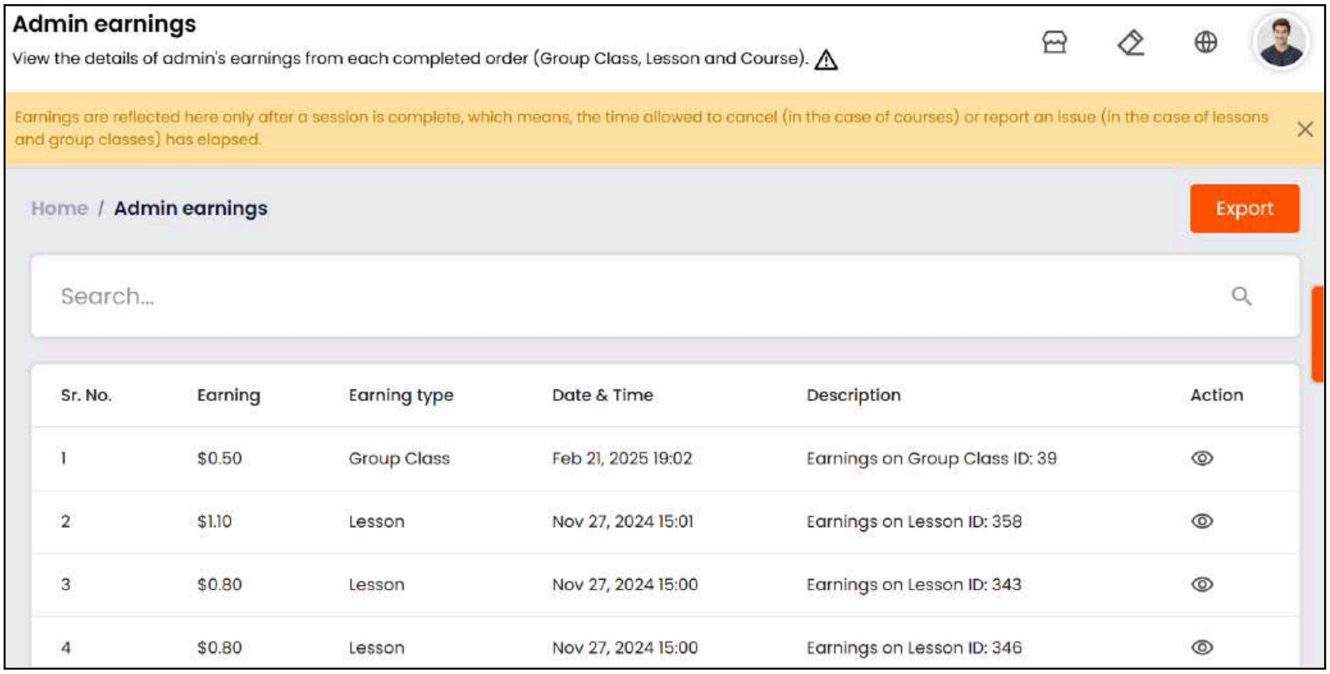
After setting the filters and clicking **Search** to view the results, click **Export** to download the filtered data as a `.csv` file.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

14.7 Admin earnings

Use this report to track your earnings from each completed session, including lessons, group classes, and courses sold on the platform.

The earnings are recorded and reflected only after a session is marked as complete and the allowed period to request a cancellation (for courses) or raise a dispute (for lessons and group classes) has passed.



All earnings are listed in reverse chronological order so the most recent transactions appear first. This breakdown allows you to monitor platform revenue on a per-order basis and verify that your commission is being recorded accurately.

The list will be empty if you just bought the platform and didn't choose to have dummy content provided by FATbit during the platform installation.

Manage the admin earnings report list

The list displays the following information:

- **Sr. No.:** The serial number.

- **Earning:** The amount earned from a single session. This is your share based on the platform's commission model and is calculated after deducting any applicable coupon or reward-based discounts.

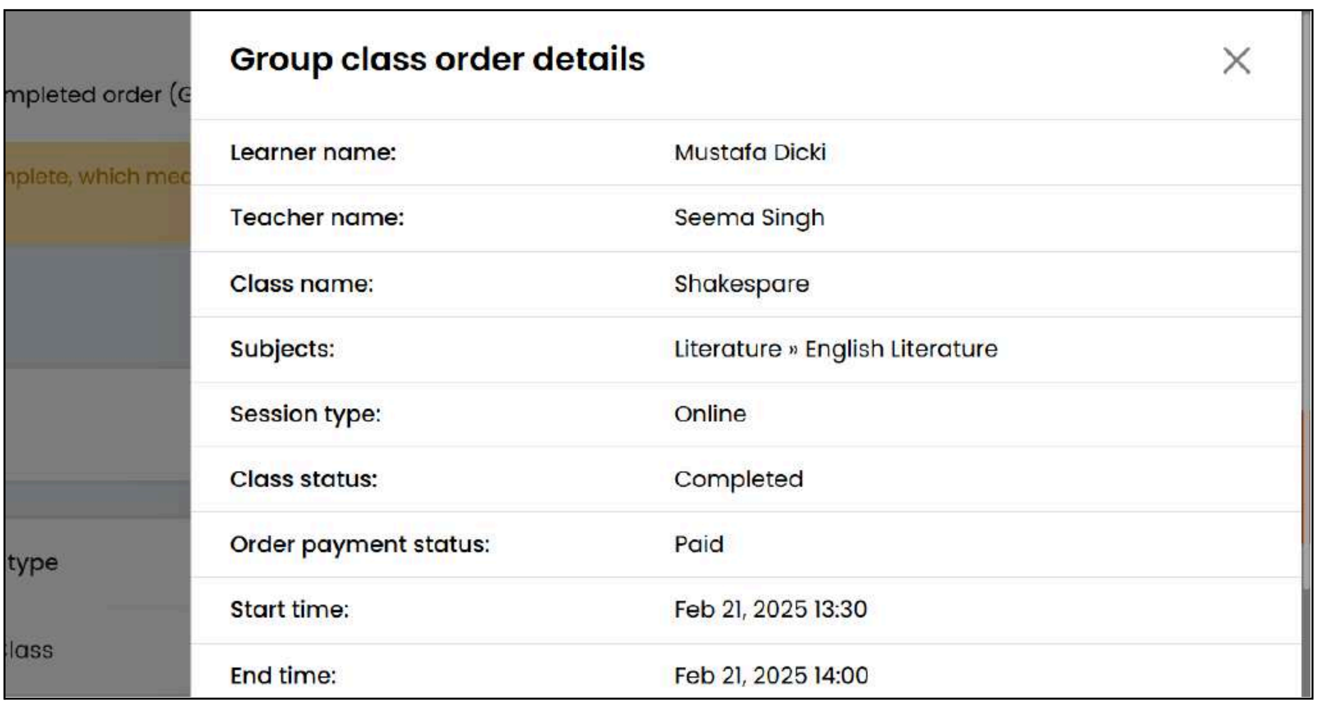
  Earnings appear only after a session is marked complete and the post-session time window to cancel or report an issue has ended. This ensures all earnings displayed are final and undisputed.

- **Earning type:** This indicates the category of the order—whether the amount was earned from a Lesson, Group Class, or Course.
- **Date & Time:** The timestamp of when the earnings were settled and recorded after session completion.
- **Description:** The order ID or session ID from which the earning was derived. This helps trace earnings back to specific bookings.

Action button

There is a single action button next to each entry—**View** .

Click this button to view the order details for the corresponding **group class**, **lesson**, or **course** based on the listed date and time. A drawer will open displaying the applicable details (see example image below).



The information shown matches what is available in the—[Lesson order details](), [Group class details](), or [Course details]()—sections. Refer to these sections in this manual for a breakdown of the displayed information.

After reviewing the details from the drawer, click to close it.

Search for an admin earning report

Use the search functionality at the top of the list to find a specific admin earning's report.

Click the search bar or to expand it. Click or the search bar again to collapse the section.

There are several filters that help narrow down the search. Each field is explained below:

- **Type:** Click the field and select the category of the order from the dropdown list—whether the amount was earned from a Lesson, Group Class, or Course.
- **Date range: From:** To view the report of a specific date, select the desired date in this field.

  To filter the report of a date range, select the start date by clicking the field. A calendar will appear; choose the date, and it will be added to the field. Use the **Today** button to select today's date and **Ok** to close the calendar.
- **Date range: To:** Select the ending date of the range in this field.

  *The **Date range: From** value must always be an earlier date, and the **Date range: To** value must be later than the date selected in the **Date range: From** field.*

  *For example, if the **Date range: From** is 09/24/2020, the **Date range: To** must be a date after this, such as 09/25/2020 or any future date. If incorrect dates are entered, no results will be displayed in the list.*

Search for a report by filling in a single field or multiple fields. To view the report of a specific date range, use the date fields.

After filling in the desired fields, click **Search** to display the results. Click **Clear** to reset all fields and start a new search.

Export the admin earnings report data

To export the admin earnings report data from this page, click **Export** from the upper-right corner.

The data will be downloaded as a `.csv` file (Comma-Separated Values), which can be used for backups or external purposes.

A success message will appear once the download is complete.

To export a specific part of the report, use the [search bar] to apply the necessary filters and define the criteria.

After setting the filters and clicking **Search** to view the results, click **Export** to download the filtered data as a `.csv` file.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
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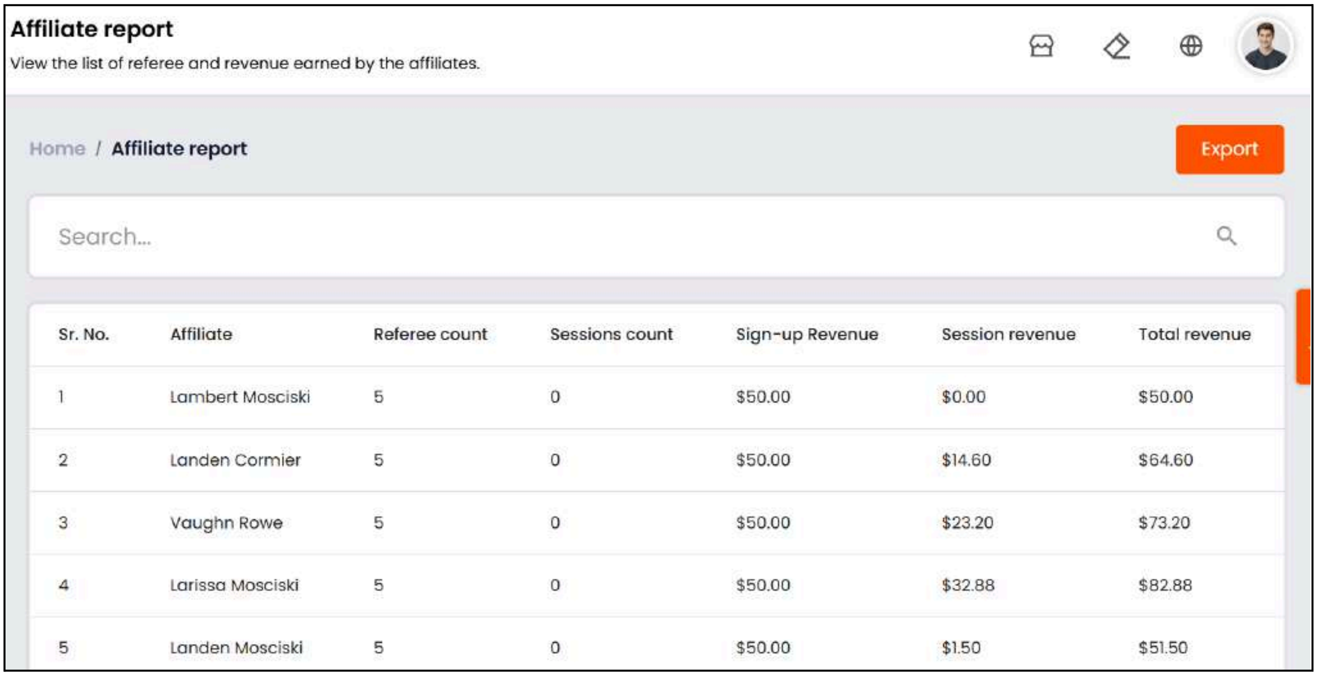
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

14.8 Affiliate report

Use the **Affiliate report** to analyze the earnings generated by each affiliate user on the platform.

This report displays a detailed list of all affiliates along with the number of users they have referred and the revenue earned through those referrals.



This report helps in tracking and evaluating the effectiveness of affiliate referrals and the resulting earnings from both sign-ups and continued platform usage.

The list will be empty if you just bought the platform and didn't choose to have dummy content provided by FATbit during the platform installation.

Manage the affiliate report list

The list is arranged in descending order and includes the following columns:

- **Sr. No.:** The serial number.
- **Affiliate:** The name of the affiliate who shared the referral link.
- **Referee count:** The total number of users who signed up using the affiliate's referral link.

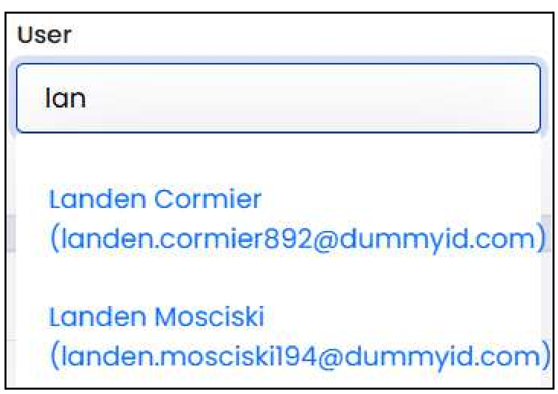
- **Sessions count:** This indicates the number of sessions purchased by users referred through the affiliate link.
- **Sign-up revenue:** The revenue earned for successful user sign-ups through the affiliate link.
- **Session revenue:** The earnings generated when the referred users purchase sessions on the platform.
- **Total revenue:** The total earnings generated by the affiliate, calculated as the sum of the sign-up revenue and session revenue.

Search for an affiliate’s performance report

Use the search functionality at the top of the list to find a specific affiliate’s performance report.

Click the search bar or to expand it. Click or the search bar again to collapse the section.

Enter the affiliate’s name in the **User** field. Place the cursor in the field and start typing. As you type, a list of matching results will appear—select the appropriate option.



DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

Once done, click **Search** to get the results. Click **Clear** to reset the field and start a new search.

Export the affiliate report data

To export the affiliate performance report data from this page, click **Export** from the upper-right corner.

The data will be downloaded as a `.csv` file (Comma-Separated Values), which can be used for backups or external purposes. A success message will appear once the download is complete.

To export a specific part of the report, use the [search bar] to apply the necessary filters and define the criteria.

After setting the filters and clicking **Search** to view the results, click **Export** to download the filtered data as a `.csv` file.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

15. Forum

This module in Yo!Coach lets you manage user conversations across the platform. It supports knowledge sharing between learners and experts through open discussions.

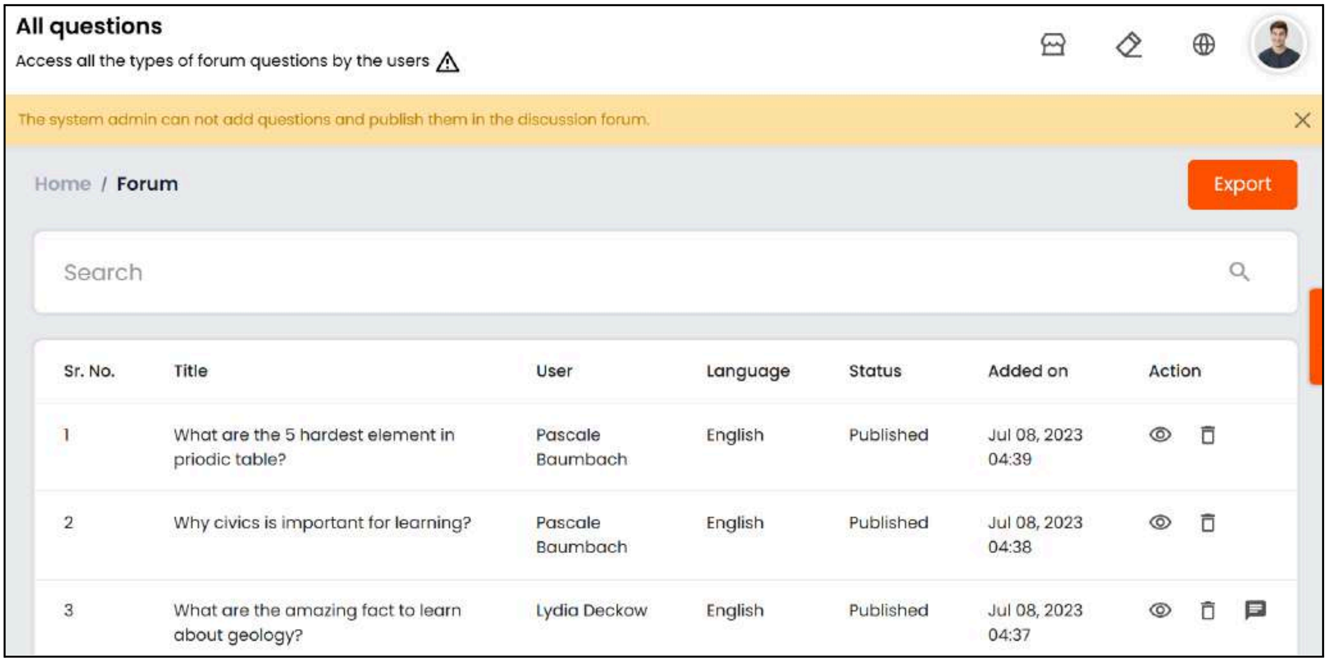
As the admin, you can moderate questions, handle reported content, and manage discussion tags to keep topics organized and relevant. Use it to maintain content quality, approve tags, and support meaningful interaction on the platform.

Expand this module to view the submodules. Then, click the submodule to visit their respective pages.

Each submodule is explained in detail.

15.1 All questions

Use this submodule to access and manage questions submitted by users on the platform.



This page displays a detailed list of all published forum questions, including the title, user name, subject, status, and submission date.

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An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

Use this view to monitor user-submitted content and perform actions such as viewing, deleting, or reviewing comments.

The system admin is not allowed to add or publish questions in the discussion forum.

The list will be empty if you just bought the platform and didn't choose to have dummy content provided by FATbit during the platform installation.

Manage the questions list

The list displays the following information:

- **Sr. No.:** The serial number.
- **Title:** The title text of the user-submitted question.
- **User:** The name of the user who submitted the question.
- **Language:** The language in which the question was submitted.
- **Status:** The current status of the question, which can include Drafted, Published, Resolved, and Spammed.
- **Added on:** The date and time the question was submitted.

Action buttons

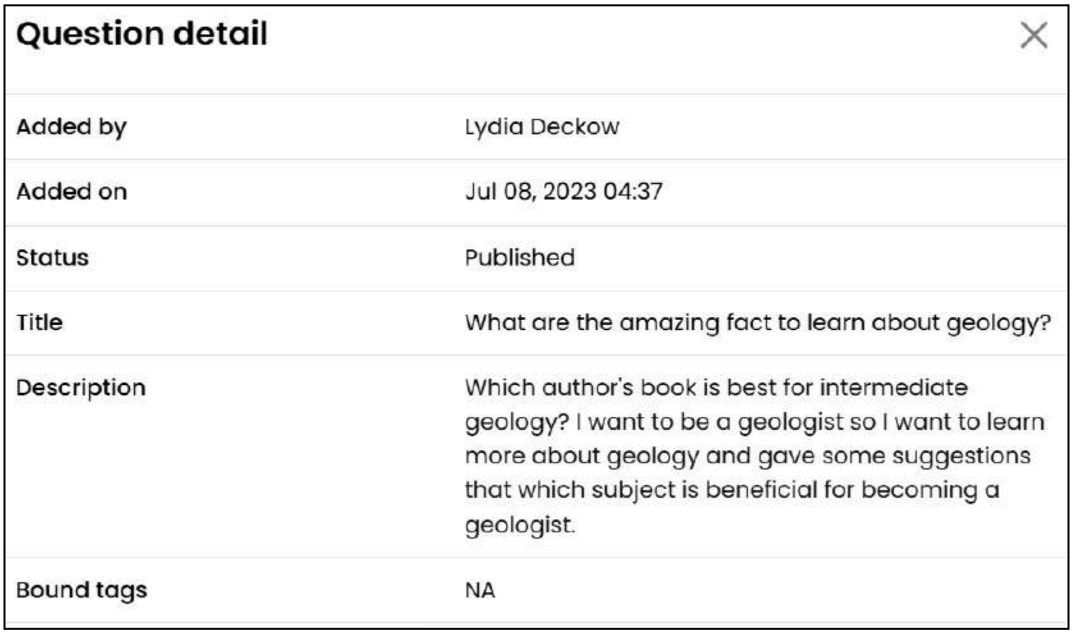
Under the **Action** column, each entry includes two or three action buttons, depending on the situation.

All questions display two action buttons—View and Delete. If a question has comments, a **Comments** button also appears.

The functions of each button are explained below:

i. View

Click the button beside a question to review the details. The Question detail drawer will appear.

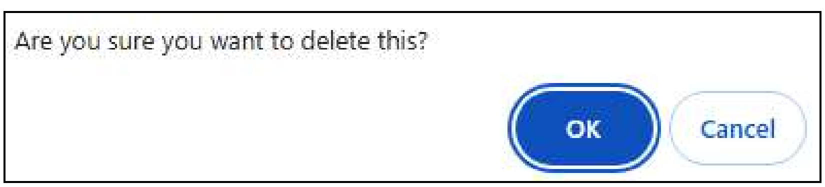


It displays the question's details, including who added it, when it was added, its status, title, description, and any tags. If any information is missing, **N/A** is displayed.

Review the details, then click ✕ in the upper-right corner of the drawer to close it.

ii. Delete

Click this to delete the question from the system. A confirmation message will appear.

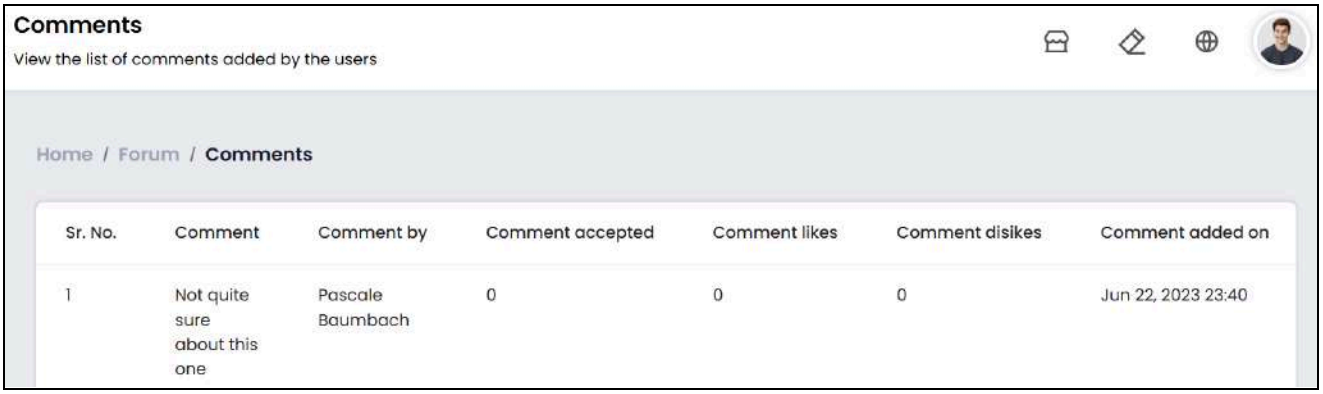


Click **OK** to confirm the action or **Cancel** to abort it.

iii. View comments

This button is only visible for questions that have comments.

Click this to view the comments shared on the question. This will direct you to the **Comments** page, as shown below.



This page displays a list of comments made by other users on the question. If applicable, a comment can also serve as the answer to the question.

The **Comments** page displays each comment along with the comment text, the name of the user who posted it, its acceptance status, the number of likes and dislikes it received, and the date and time it was posted.

After reviewing the information, go back to the [All questions](#) page by clicking **Forum** in the breadcrumbs at the top of this page.

Alternatively, navigate back to the [All questions](#) page by selecting the submodule from the navigation panel.

Search for a question

Use the search functionality at the top of the list to find a specific question.

Click the search bar or  to expand it. Click  or the search bar again to collapse the section.

<u>**DISCLAIMER:**</u> The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

There are several filters that help narrow down the search. Each field is explained below:

- **Keyword:** Enter the title or a word from the title you are searching for in this field.
- **Status:** Click the field and select the status of the question from the dropdown list which includes—Drafted, Published, Resolved and Spammed.
- **Language:** Click the field and select the language of the question from the options available.

  Note that only those languages that the platform is available in will be listed here (and also for the user submitting the question).
- **Date range: From:** To view the comments posted on a specific date, select the desired date in this field.

  To filter comments posted within a date range, select the start date by clicking the field. A calendar will appear; choose the date, and it will be added to the field.

  Use the **Today** button to select today's date and **Ok** to close the calendar.
- **Date range: To:** Select the ending date of the range in this field.

  *The **Date range: From** value must always be an earlier date, and the **Date range: To** value must be later than the date selected in the **Date range: From** field.*

  *For example, if the **Date range: From** is 09/24/2020, the **Date range: To** must be a date after this, such as 09/25/2020 or any future date. If incorrect dates are entered, no results will be displayed in the list.*

Search for a question by filling in a single field or multiple fields. To view comments posted within a specific date range, use the date fields.

After filling in the desired fields, click **Search** to display the results. Click **Clear** to reset all fields and start a new search.

Export all questions data

To export the questions data from this page, click **Export** from the upper-right corner.

The data will be downloaded as a `.csv` file (Comma-Separated Values), which can be used for backups or external purposes.

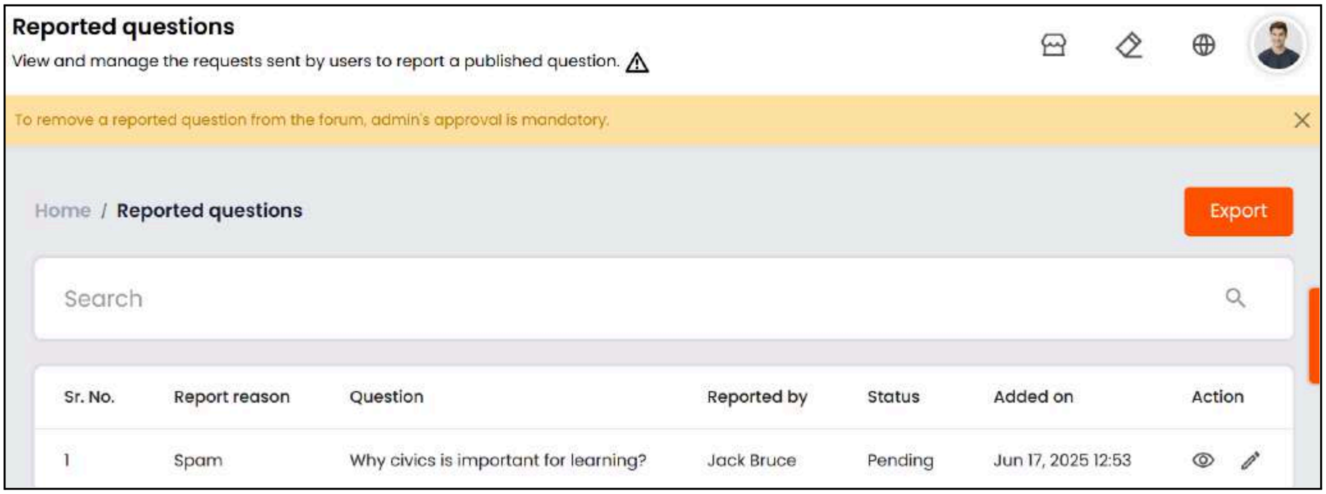
A success message will appear once the download is complete.

To export specific questions data, use the [search bar](#) to apply the necessary filters and define the criteria.

After setting the filters and clicking **Search** to view the results, click **Export** to download the filtered data as a `.csv` file.

15.2 Reported questions

The Reported questions submodule allows system administrators to review and manage forum questions reported by users.



Reports can be submitted for questions that are inappropriate, repetitive, offensive, or spam. Each report requires administrator approval before further action.

The list will be empty if you just bought the platform and didn't choose to have dummy content provided by FATbit during the platform installation.

Manage the reported questions list

The list displays the following information:

- **Sr. No:** The serial number.
- **Report reason:** The reason selected by the user when submitting the report.

  Define all the report reasons available for users under **Forum** > Report reasons.
- **Question:** The forum question that was reported.
- **Reported by:** The user who submitted the report.
- **Status:** The current status of the report—Pending, Accepted, or Canceled.
- **Added on:** The date and time the report was submitted.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
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The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

Action buttons

Under the **Action** column, each entry displays one or two buttons, depending on its status.

Requests that have not yet been reviewed and their status has not been updated (neither accepted nor canceled) will have two buttons. Requests with a finalized status—either approved or canceled—will have only one button.

The function of each button is described in detail below.

i. View

Click the button next to a reported question to review its details. A drawer opens, displaying all relevant information to help you make a decision.

Report Information

Report reason	Spam
Comment	It is not an applicable question for the platform, plus the user already selected the language here.
Reported by	Jack Bruce
Reported on	Jun 17, 2025 13:18
Action	Pending
Admin's comment	NA
Action on	NA

It displays the report reason, comment made, reported by, reported on, report status (action), admin's comment and action on (date and time the report status was updated).

Review the details, then click X in the upper-right corner of the drawer to close it.

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An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

ii. Edit

This button appears only next to reported questions that are still ***Pending*** *and have not been acted on.*

Click this to edit the report's status. The **Action form** will appear.

Update the following:

- **Take action:** Click the field and select an action from the dropdown list—Accepted or Canceled—to apply to the reported question.
- **Admin's comment:** Enter a comment to support the selected action.

Click **Save** and the form will close automatically.

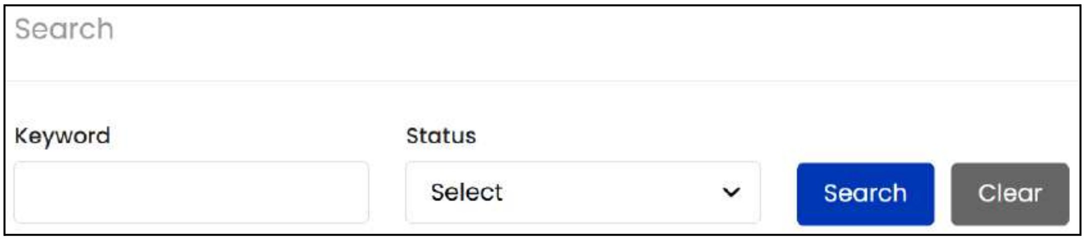
Once an action—Accepted or Canceled—is taken, the button is removed from the reported question, and no further action can be performed on it.

Search for a reported question

Use the search functionality at the top of the list to find a specific reported question.

Click the search bar or to expand it. Click or the search bar again to collapse the section.

<u>**DISCLAIMER:**</u> The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.



There are two filters that help narrow down the search. Each field is explained below:

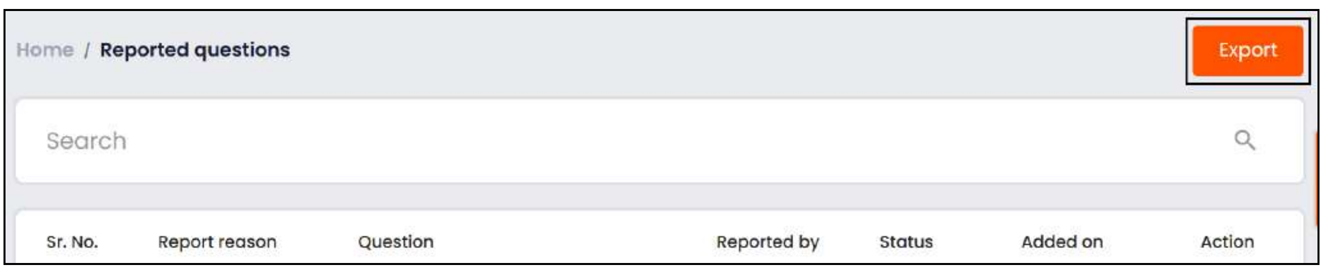
- **Keyword:** Enter the reported question title you are searching for in this field.
- **Status:** Click the field and select the report status from the dropdown list—Pending, Canceled, or Accepted.

Search for a reported question by filling in a single field or both fields.

After filling in the desired fields, click **Search** to display the results. Click **Clear** to reset all fields and start a new search.

Export reported questions data

To export the reported questions data from this page, click **Export** from the upper-right corner.



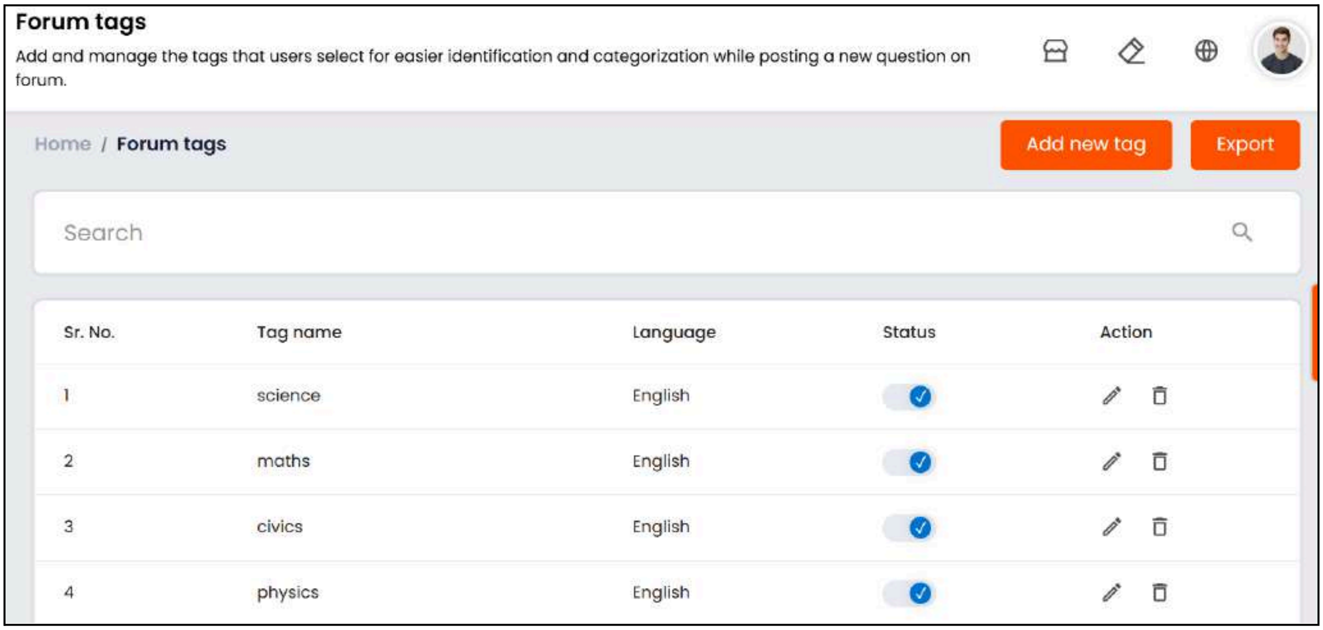
The data will be downloaded as a `.csv` file (Comma-Separated Values), which can be used for backups or external purposes. A success message will appear once the download is complete.

To export specific reported questions data, use the [search bar] to apply the necessary filters and define the criteria.

After setting the filters and clicking **Search** to view the results, click **Export** to download the filtered data as a `.csv` file.

15.3 Forum tags

The Forum tags submodule allows you to define and manage tags used for categorizing forum questions.



Users can select these tags when posting questions to ensure better organization and easier identification.

The list will be empty if you just bought the platform and didn't choose to have dummy content provided by FATbit during the platform installation.

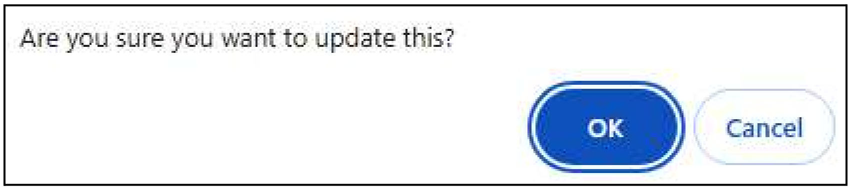
Manage the forum tags list

Each entry in the list includes the following details and provides options for management including:

- **Sr. No:** The serial number.
- **Tag name:** The tag name.
- **Language:** The language of the tag.
- **Status:** Edit the status (activate or deactivate) of a tag as per your requirements using the toggle switch beside it, under the status column.

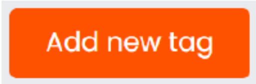
Turn **on** the toggle switch beside the tag to activate it. Leave this **off** or turn it **off** to deactivate the tag.

A confirmation message will appear in both cases.



Click **Ok** to confirm or **Cancel** to abort the action.

Add a forum tag

Click 

in the upper-right corner of the page to open the **Tag setup** form.

Update the following:

- **Tag name:** Enter the tag name.
- **Language:** Click the field and select the language for the tag from the available system languages.

<u>**DISCLAIMER:**</u> The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

Only the languages you selected when you purchased the platform will be visible in the list. To add more languages, connect with the FATbit team.

Click **Save changes**, and the form will close automatically.

Action buttons

Under the **Action** column, each entry includes two action buttons, allowing you to perform specific actions.

The functions of each button are explained in detail below:

i. Edit

Click this to edit the forum tag's details. The [Tag setup] form will appear.

Update the fields, then click **Save changes**. To close the form, click in the upper-right corner.

ii. Delete

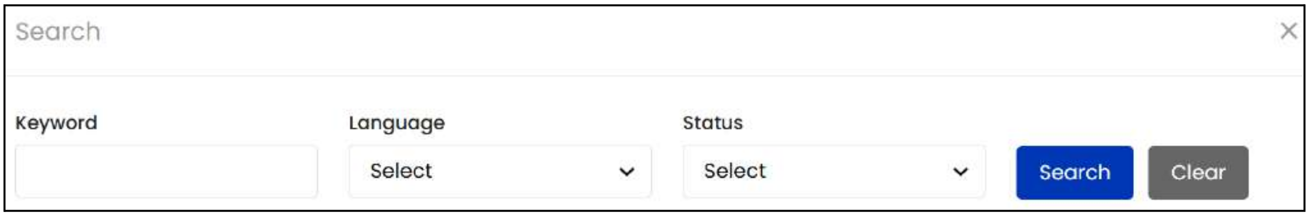
Click this to delete the forum tag from the system. A confirmation message will appear.

Click **OK** to confirm the action or **Cancel** to abort it.

Search for a forum tag

Use the search functionality at the top of the list to find a specific forum tag.

Click the search bar or to expand it. Click or the search bar again to collapse the section.



There are several filters that help narrow down the search. Each field is explained below:

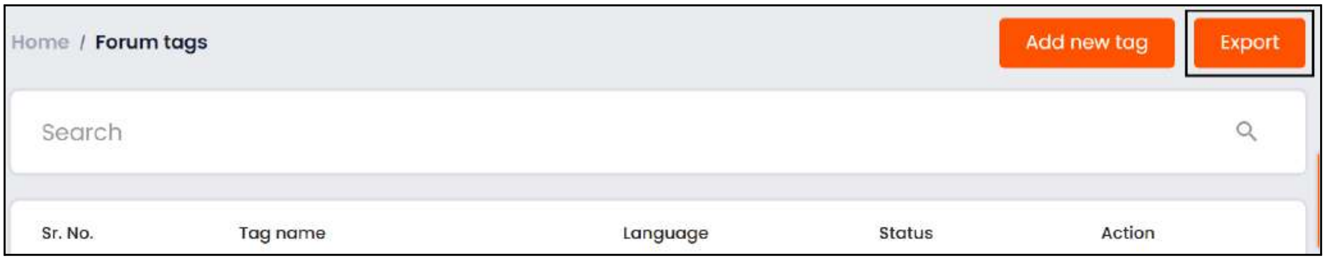
- **Keyword:** Enter the forum tag name you are searching for in this field.
- **Language:** Click the field and select the language for the tag from the dropdown list of available system languages.
- **Status:** Click the field and select the platform status of the forum tag—Active or Inactive—from the dropdown list.

Search for a forum tag by filling in a single field or multiple fields.

After filling in the desired fields, click **Search** to display the results. Click **Clear** to reset all fields and start a new search.

Export forum tags data

To export the forum tags data from this page, click **Export** from the upper-right corner.



The data will be downloaded as a `.csv` file (Comma-Separated Values), which can be used for backups or external purposes. A success message will appear once the download is complete.

To export specific forum tags data, use the [search bar] to apply the necessary filters and define the criteria.

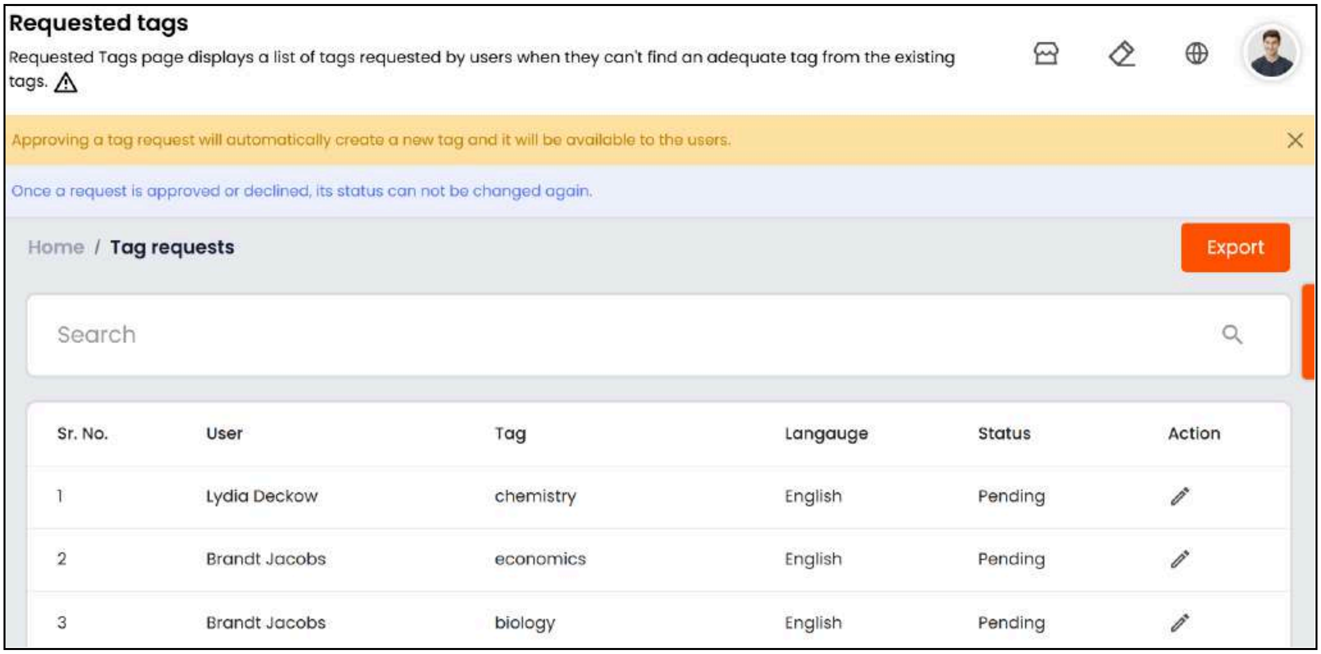
After setting the filters and clicking **Search** to view the results, click **Export** to download the filtered data as a `.csv` file.

15.4 Requested tags

The Requested tags submodule allows you to manage forum tag requests submitted by users.

If existing tags do not meet their needs, users can request new ones to help categorize their questions more effectively.

These tags are not available on the platform until approved by the administrator. Use this submodule to view, approve, or reject requested tags.



The list will be empty if you just bought the platform and didn't choose to have dummy content provided by FATbit during the platform installation.

Manage the requested tags list

The list displays the following information:

- **Sr. No.:** The serial number.
- **User:** The name of the user who requested the tag.
- **Tag:** The name of the requested tag.
- **Language:** The language selected for the tag.

<u>**DISCLAIMER:**</u> The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

- **Status:** The current status of the request—Pending, Rejected, or Approved.

Action button

There is a single action button next to each entry—**Edit** .

The button is available only for entries with Pending status.

Click this to edit the tag's request status. The **Tag status** form will appear.

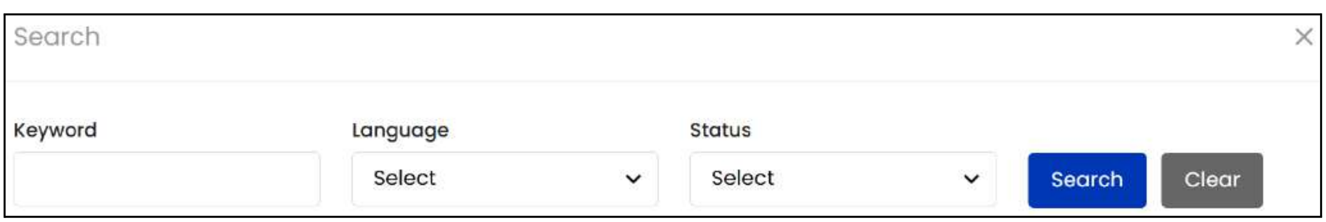
Click the field and select a status from the dropdown list—Approved or Rejected.

Then, click **Update**. The form will close automatically.

Search for a requested tag

Use the search functionality at the top of the list to find a specific requested tag.

Click the search bar or to expand it. Click or the search bar again to collapse the section.



There are several filters that help narrow down the search. Each field is explained below:

- **Keyword:** Enter the requested tag name you are searching for in this field.
- **Language:** Click the field and select the language for the tag from the dropdown list of available system languages.
- **Status:** Click the field and select the request status of the tag—Pending, Approved or Rejected—from the dropdown list.

Search for a requested tag by filling in a single field or multiple fields.

After filling in the desired fields, click **Search** to display the results. Click **Clear** to reset all fields and start a new search.

Export reported tags data

To export the reported tags data from this page, click **Export** from the upper-right corner.

The data will be downloaded as a `.csv` file (Comma-Separated Values), which can be used for backups or external purposes. A success message will appear once the download is complete.

To export specific requested tags data, use the search bar to apply the necessary filters and define the criteria.

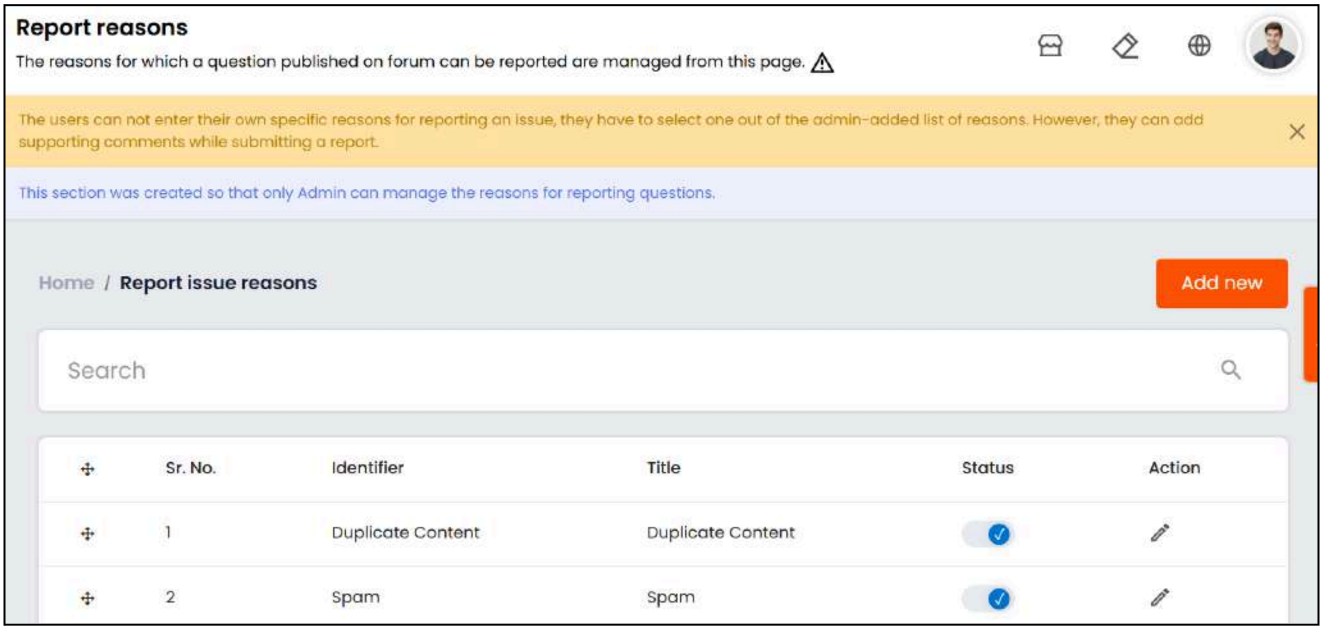
After setting the filters and clicking **Search** to view the results, click **Export** to download the filtered data as a `.csv` file.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

15.5 Report reasons

Use the Report reasons submodule to manage the reasons users can select when reporting a question.

Questions that are offensive, inappropriate, or spam can be reported by platform users. You can modify the list of report reasons as needed.



The list will be empty if you just bought the platform and didn't choose to have dummy content provided by FATbit during the platform installation.

Manage the report reasons list

Each entry in the list includes the following details and provides options for management including:

- **Drag-and-drop :** Click this next to a report reason to move it up or down the list, and the serial numbers will automatically update to reflect the new sequence.

  The report reasons will appear in the same order across all applicable lists on the platform.

- **Sr. No:** The serial number.

- **Identifier:** This is the report reason's system identifier, used to save data in the system and not displayed anywhere on the platform.
- **Name:** The report reason title as displayed throughout the platform and in the relevant lists.
- **Status:** Edit the status (activate or deactivate) of a report reason as per your requirements using the toggle switch beside it, under the status column.

  Turn **on** the toggle switch beside the report reason to activate it.

  Leave this **off** or turn it **off** to deactivate the report reason.

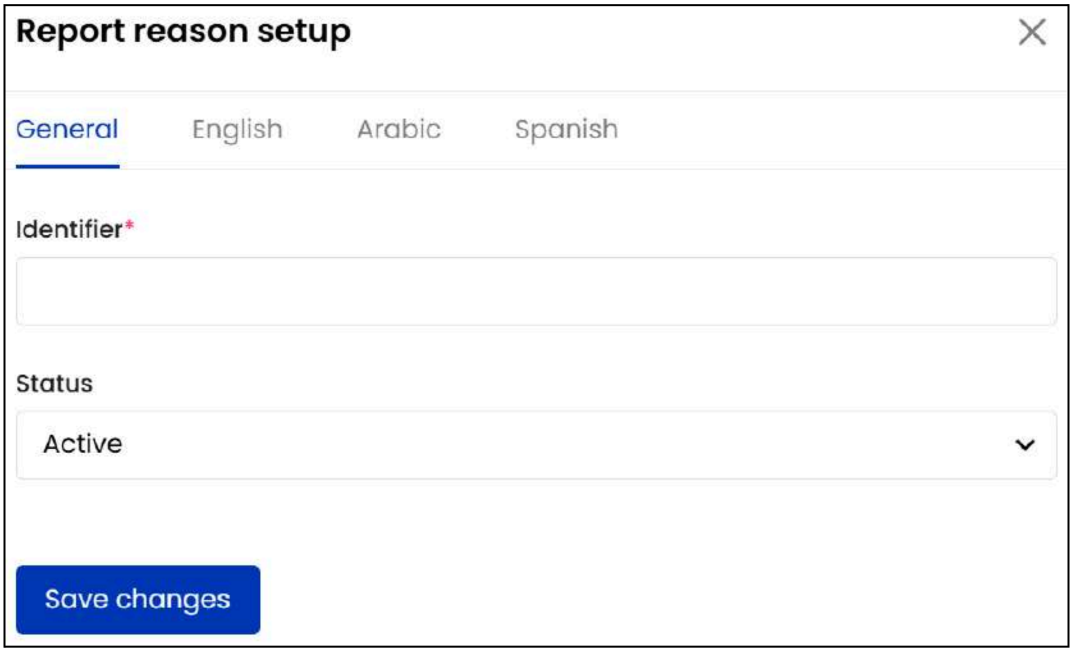
  A warning dialog box will appear for both actions, asking if you want to update the status or not.

  Click **Ok** to delete it or **Cancel** to abort the action.

Add a report reason

Click 

in the upper-right corner of the page to open the **Report reason setup** form.



DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

This form contains multiple tabs: the General tab, followed by the Primary language tab.

After that, you'll find the **Secondary language** tabs, corresponding to the languages available on your platform.

Let's start with the **General tab**.

General tab

Update the following:

- **Identifier*:** Enter a unique report reason identifier. It can match the report reason title, as defined under the Language data tabs (e.g., English, Arabic, Spanish).

  The identifier is used to save data in the system and will not be displayed anywhere on the platform. Ensure the identifier is unique; otherwise, an error message will appear.

- **Status:** Click the field and select the platform status of the report reason. Select **Active** to publish it on the platform, enabling users to select it when reporting a forum question.

  Select **Inactive** to temporarily hide the report reason on the platform.

Once done, click **Save changes**.

This will direct you to the next tab, which is the primary language tab (English tab).

English tab

This is the primary language tab, and completing this tab is mandatory for publishing the report reason on the platform.

Since English is set as the primary language, this tab is labeled **English**.

When you reach this tab, the name of the form also changes to **Report options setup**.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

Update the following:

- **Title*:** Enter the report reason title in the primary language.

  This name will be displayed to users when they need to select the report reason for reporting a question. This name will also be visible to you as the report reason under **Forum** > Reported questions.

- **Auto-translate into other languages:** Check mark this to automatically update the secondary language(s) data. The data in the subsequent language tab(s) will be auto-filled.

  *This feature is available only if the Microsoft translator API is configured under **Settings** > **System configurations** > Third-party APIs.*

  If you prefer to manually fill in the secondary language(s) data, leave the checkbox unselected.

Once done, click **Save changes**.

The next tab(s) will be the secondary language tab(s) (Arabic, Spanish, etc.), which include the same fields as the English tab.

*If you had selected the auto-translate option, the secondary language tab(s) will be prefilled. Review the data, make any necessary edits, click **Save changes**, and close the form.*

*If you did not use the auto-translate feature earlier, use the **Auto-translate & fill language data** button beside the **Save changes** button on each secondary language tab to auto-fill the secondary language fields. Then, click **Save changes**, and close the form.*

<u>**DISCLAIMER:**</u> The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

*If you do not want to fill the secondary language tab(s) at this time, complete only the primary language tab (English tab), click **Save changes**, and close the form.*

After updating all necessary fields, click in the upper-right corner of the form.

Action button

There is a single action button next to each entry—**Edit** .

Click this button to edit the report reason details. The [Report reason setup] form will appear.

Update the fields, then click **Save changes**.

To close the form, click in the upper-right corner.

Search for a report reason

Use the search functionality at the top of the list to find a specific report reason.

Click the search bar or to expand it. Click or the search bar again to collapse the section.

Enter the report reason title or identifier in the **keyword** field and click **Search** to get the results.

Click **Clear** to reset the field and start a new search.

DISCLAIMER: The color theme and labels may differ in the screenshots compared to those on the platform.
An **asterisk (*)** next to a label indicates that the information is mandatory.
The **secondary language** setting and tabs are **ONLY available** if you have selected more than one language for the platform.

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