

PeopleFluent Learning

Token Payments Guide

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About this Document

Introduction

The Token Payment Feature in LMS allows organizations to make use of "tokens" in personal / organization accounts to manage the enrollments of courses. This document describes the configuration and operations of Token Payments.

Document Information

This section lists any changes or updates that occur following initial publication.

Revision Information	
Revision Date:	April 25, 2024
Revised Document Version Number:	2.0
Details of Revision:	Initial publication.

Setting up Token Payments

Enabling Token Payments

1. Go to **System Configuration**.
2. Under **General** (Category) > **Enforce Token-Processing Business Logic**, select Enforce for self-enrollments and enrollment wizard from the drop-down.
3. Under **Online Payment** (Category), check **Enable online payment** and **Allow enrollment approval** with online payment.

Selecting the Payer in Token Payments

Go to **System Configuration** > **Online Payment** (Category) > **In approval workflows, tokens are paid by**, check either **Final Approver** or **Enrollment Requester** depending on organization's requirements.

Role Access Control

To appoint the staff responsible for handling Token Payments, go to **ROLES** > **System Role** and select the desired role(s) to assign the required access controls. Then on the left of the **Access control for role** page:

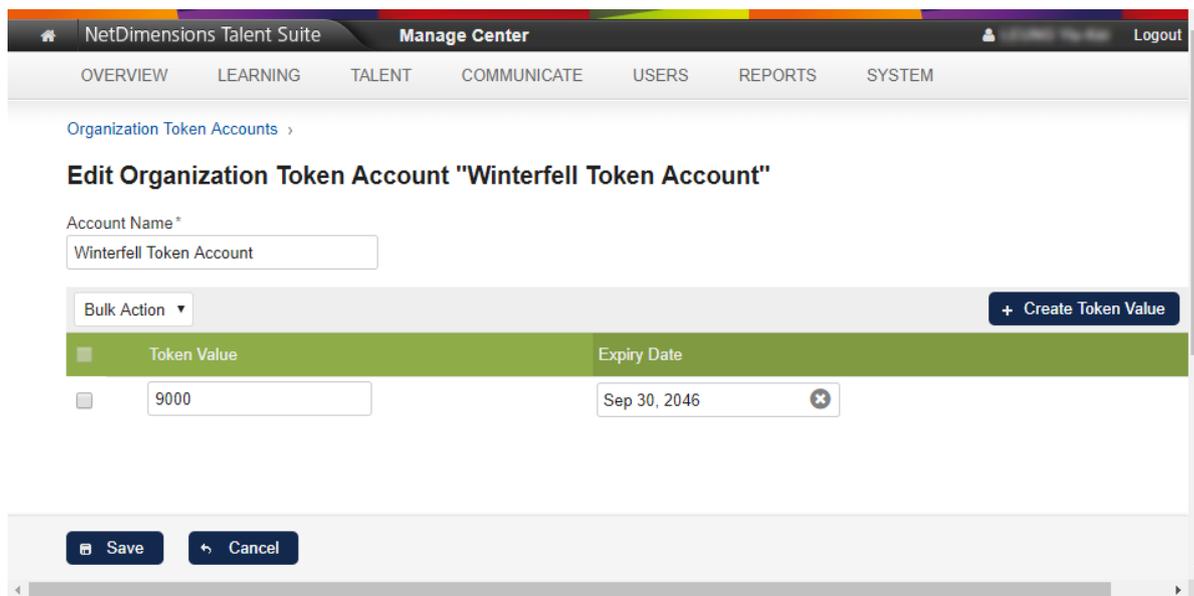
1. Select **Manage Features** > **Payment Manager**, set the access control of **Token Packages** and **Organization Token Accounts** to **Unrestricted**.
2. Select **Data Access Control** > **Role General Permissions**, select **Yes** for both **Show Tokens Tab** and **Allow Token Manual Adjustment**.

Organization Token Accounts

Creating Organization Token Accounts

The organizations should have specific accounts for token transactions. All tokens purchased by their learners would be credited to these accounts. To create an Organization Token Account:

1. Go to **PAYMENT MANAGER > Organization Token Accounts**. Click **+ Create new token account**.
2. Enter a unique **Account Name**. Then click **+ Create Token Value**.
3. Enter the desired **Token Value** and **Expiry Date** (if applicable).



The screenshot displays the 'Manage Center' interface for 'NetDimensions Talent Suite'. The breadcrumb trail is 'Organization Token Accounts >'. The main heading is 'Edit Organization Token Account "Winterfell Token Account"'. Below this, there is a form with the following fields and controls:

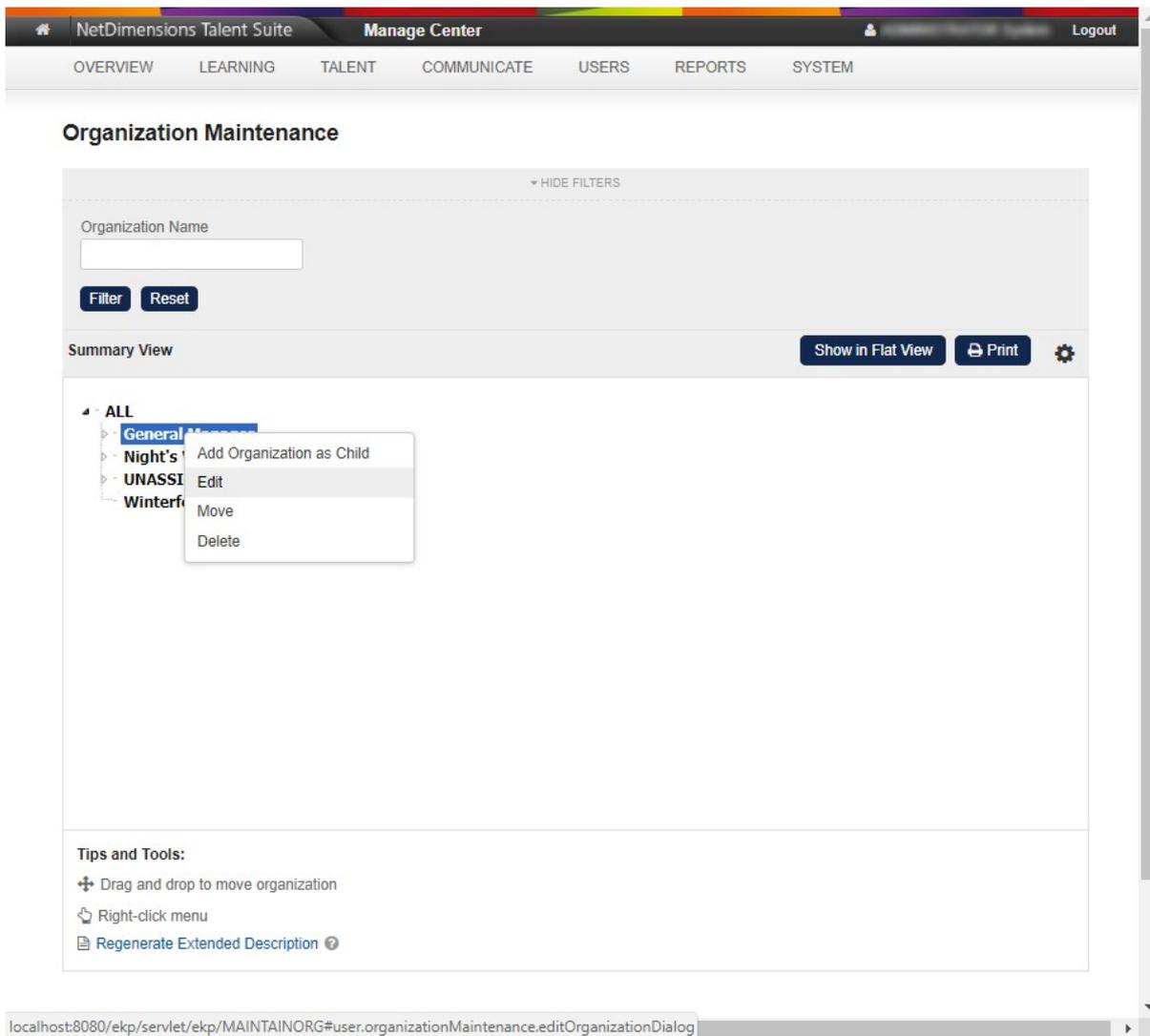
- Account Name***: A text input field containing 'Winterfell Token Account'.
- Bulk Action**: A dropdown menu.
- + Create Token Value**: A blue button.
- Table**: A table with two columns: 'Token Value' and 'Expiry Date'.

Token Value	Expiry Date
9000	Sep 30, 2046
- Save** and **Cancel**: Two buttons at the bottom left.

Associating Token Accounts with Organizations

The newly created token accounts should be associated to the organizations. Go to **GROUP AND ORGANIZATION > Organization Maintenance**.

1. Select the organization to which the Organization Token Account needs to be associated to, right click and select **Edit** from the menu.



2. On the **Edit Organization "..."** page, scroll to the **Enrollment & Payment** Section. Select the desired **Token Account** for the given organization from the list.

Enrollment & Payment

Enrollment Policy 

Template for Assessment Workflow
Select a Template

Payment Plan
Select a Plan

Token Account
Select an Account
Select an Account
Winterfell Token Account

The manager is used as part of processing for mass distribution reports (such as R503) to help simplify automated review and distribution processes.

Manager Name
Search for a user

Member Management & Notification Settings

Approver
Search for a user

New User Welcome E-mail
[Select](#)

New Password E-mail
[Select](#)

Feedback Address (E-mail or URL):

Logout URL (leave blank for default):

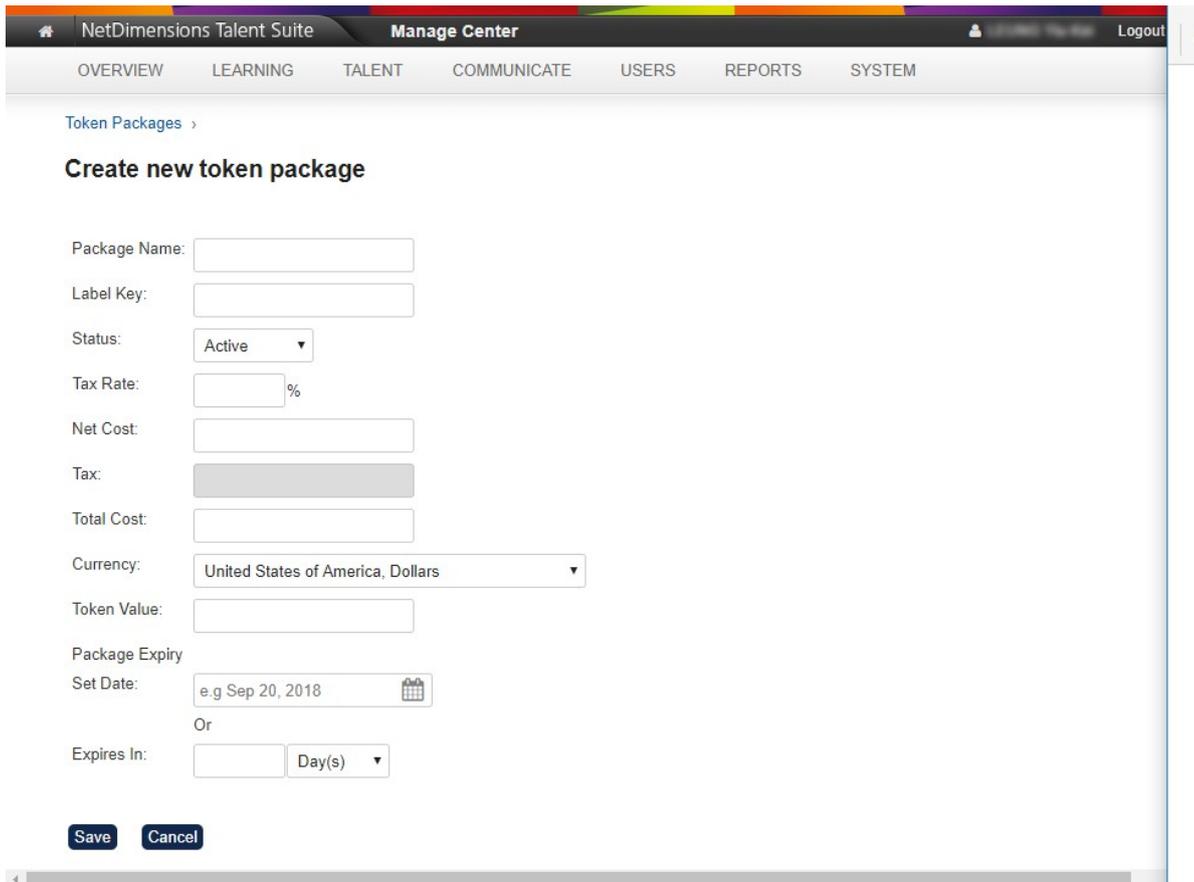
Save **Cancel** **Print**

Creating Token Packages

In LMS, tokens are grouped in packages to be sold to Learners with different pricing options. When Learners buy a package, the tokens in it will end up in their organization’s account.

To create a token package:

1. Go to **LEARNING > PAYMENT MANAGER > Token Packages**. Click **+ Create Token Package**.
2. Input the relevant details.



Field	Description
Package Name	A unique name to identify each package
Label Key	A name of the key in the customs.properties file with package name in a language other than English
Status	Status of the package (Active / Suspended). Only active packages can be purchased.
Tax Rate	Tax rate in percentage
Net Cost	Net cost of the package

Tax	Total Tax = Net Cost X Tax Rate
Total Cost	Price of the package = Net Cost + Tax This is the amount paid to purchase this package.
Currency	Currency used
Token Value	Number of Tokens in the package When a user buys one unit of this package, this token value will be credited to the organization's token account.
Package Expiry - This can be set in either ways (but not both):	
Set Date	The package will expire on the input date. Token packages that passed this date will not show up for purchase.
Expires In (Day(s))	The package will expire in the input period after its purchase.

Once set up and saved, permissions of the token packages can be set using the Permissions Selector.

- **Unrestricted Access** will be granted to the package creators, i.e. the owner by default.
- **Read Only Access** should be granted to any entities (e.g. users, user groups, organizations, roles, and user attributes) that need to buy the package.

Or
Expires In:

Permissions

Read Only Access

Users who meet any of the following criteria

- AUBREY Glenna (GLENNAAUB) x
- STATHAM Willie (WILLIES) x
- MATTHEW Polly (POLLYM) x
- MITCH Ronaldo (RONALDOM) x
- MORTON Suellen (SUELLENM) x
- KLITSCH Dora (DORAK) x
- MADELYN Jovan (JOVANM) x
- BUMBRAY Rosalia (ROSALIAB) x
- DENYSE Frederic (FREDERICKD) x
- COUEY Donya (DONYAC) x
- ROLAND Daryl (DARYLR) x

Search for a user

Unrestricted Access

Users who meet any of the following criteria

- LEUNG Yu-hai (NETO_YH) x

Search for a user

-

Setting Token Costs for Courses

(Applies to   )

To set up courses for purchase with tokens:

1. Go to the Catalog Editor of the target course. Click Catalog Setup > Enter Cost Information in the left navigation pane.
2. For tokens, you can use one of the following Charge Procedures:
 - a. **Online Payment** for deducting a token amount per learner enrollment.
 - b. **Organization One Off Token Payment** for deducting a token amount per organization.

Online Payments

Online Payments can be configured to accept tokens, in addition to real currencies.

1. Enter the relevant details under Token Payment.
2. Token costs can also be applied to **Optional Payment Items**. Set up the fields if necessary.

Catalog Editor

Session Properties
Module Properties

Behavioral Studies (EKP000001808)

1 Catalog Setup
 1.1 Define Module Properties
 → 1.2 Enter cost information
 1.3 Enter objectives
 1.4 Enter references
 1.5 Preview
 1.6 View usage statistics
 1.7 Indicated Interest List
 1.8 Associated Programs
 1.9 Virtual Archive
 1.10 Checklist

2 Access control/enrollment control
 2.1 Define Module Security
 2.2 Assign prerequisites
 2.3 Assign Recommended Course(s)
 2.4 Assign exam/certification/evaluation
 2.5 Define Enrollment Policy
 2.6 Enrollment Restriction
 2.7 E-mail Preferences Setup

3 Knowledge Center Setup
 3.1 Setup Options

4 Launch setup
 4.1 Define Launch Properties
 4.2 Preview
 4.3 Proxied Launch Package

Cost Information

Behavioral Studies (EKP000001808)

Cost/Enrollment Information

The following cost attributes are used to determine how to put entries into the participant account when they enroll for a learning module/program. It is recommended that a cost be assigned, even if participants are not actually charged, as this helps with budget and ROI planning.

Charge Procedure: Online Payment

Charged Cost Center

Currency Payment

Currency: United States of America, Dollars

Cost: 0.00

Price Info

Token Payment

Cost: 150.00 Token(s)

Price Info: Tuition Fee

Optional Payment Items

Configure items that can be optionally purchased by learners when buying a course.

Optional Payment Item

Types

Reference_Books

Per Unit

Cost: 100.00

Token Cost: 50.00

Study_Materials

% of Course Cost

Cost: 60.00

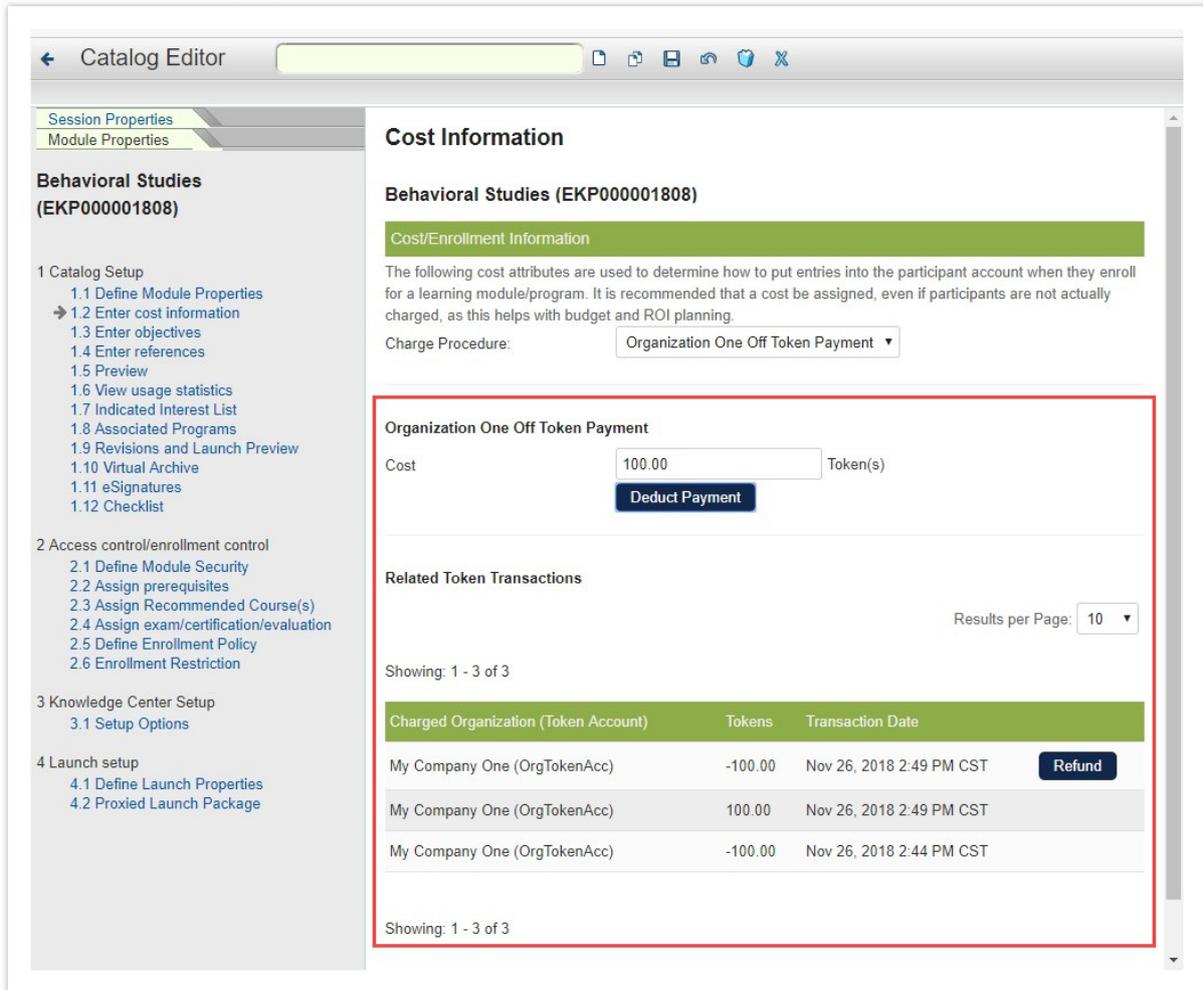
Token Cost: 30.00

Organization One Off Token Payment

Organization One Off Token Payments allows an Administrator to charge a one-off lump sum for an entire module or session and debit this amount from the organization token account instead of charging per individual learner enrollment.

1. Specify the **Cost** for the One Off Token Payment.
2. **Deduct Payment** from the organization.
3. Previous related token transactions can be viewed.

4. A one-off token payment can be refunded.



When deducting or refunding One-off token payments, the Administrator can opt to also adjust organization constraints:

Related Token Transactions

Results per Page: 10 ▾

Showing: 1 - 3 of 3

Charged Organization (Token Account)	Tokens	Transaction Date	
My Company One (OrgTokenAcc)	-100.00	Nov 26, 2018 2:49 PM CST	Refund
My Company One (OrgTokenAcc)	100.00	Nov 26, 2018 2:49 PM CST	
My Company One (OrgTokenAcc)	-100.00	Nov 26, 2018 2:44 PM CST	

Showing: 1 - 3 of 3

Refund ✕

My Company One (OrgTokenAcc) 100.00 Token(s)

Adjust Organization Constraints

Confirm Refund **Cancel**

Depending on the level at which the transaction is carrying out, the adjustment will be:

Transaction	Level	Organization Constraints Adjustment
Deduction	Module	The selected organizations will be added to the module organization constraints allowing all learners within the organizations to enroll in any session
Refund	Module	The organization being refunded will be removed from the module organization constraints (if present) prohibiting learners in the organization from enrolling in any session
Deduction	Session	The selected organizations will be added to the session organization constraints allowing all learners within the organizations to enroll in the given session
Refund	Sessions	The organization being refunded will be removed from the session organization constraints (if present) prohibiting learners in the organization from enrolling in the given session

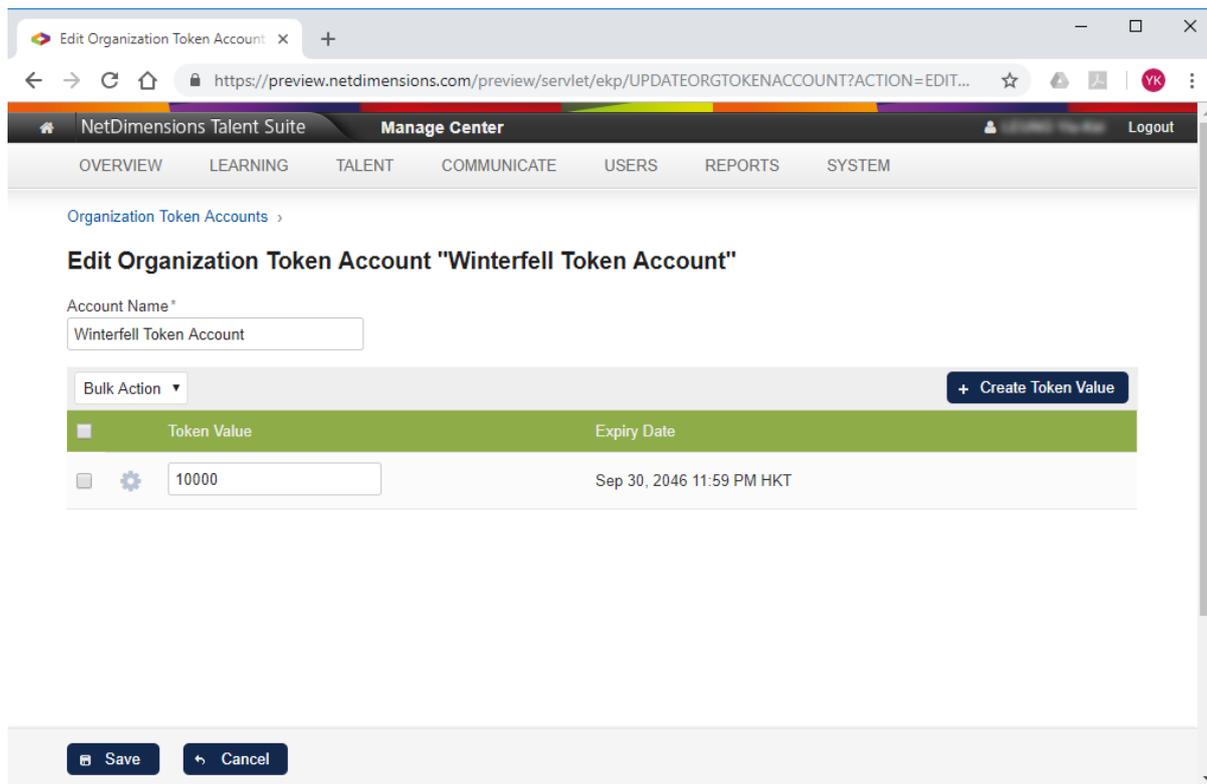
Token Adjustments

The credits in organization / user token accounts can be manually adjusted.

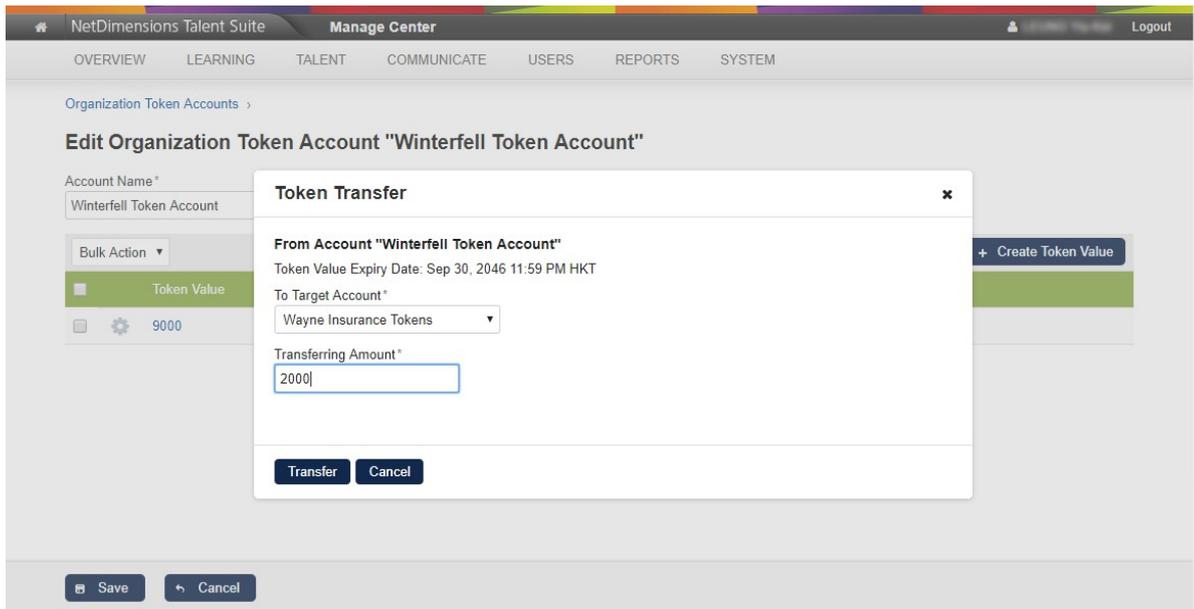
Organization Token Accounts

Organization Token Accounts are adjusted under **PAYMENT MANAGER > Organization Token Accounts**.

1. Select the desired account.
2. Click the **Token Value** to be adjusted. Then enter the new value.



The Administrators can transfers tokens across different departments within their organization by clicking **Transfer** under the Cog icon.



User Token Accounts

Token values are adjusted on the **Token Account** Tab in the **User Editor** of the desired Users.

1. To adjust the current **Token Value(s)**, enter the new one in the **New Token Value** Column.
2. To add new tokens with an expiry date (optional), enter the **Token Value** and the **Expiry Date** in the **Add new tokens** section.

User Editor

Organization

- ALL
- _Lv-6
- _Lv-7
- 10.2 Level 1
- Asia Pacific
- CIHI Discount
- CIHI Payment 100% off
- Client services
- Demo
- Designer Candidate
- Direct Appraisers
- E-Sig Test
- Esign_sample
- Esign_sample_2
- Fresenius
- General Manager
- House Stark
- ING_DEMO
- JA Jan Training
- JEA Nov Training
- Julia
- Lenovo
- Level1
- Marketing Demo
- Mechanix
- Miltenyi Biotec
- NetDimensions
- Ontario
- Pseudo Corp
- reeve's org
- Russia
- Sales
- Service team
- solo
- temp
- Test-NetD
- The Courseware Company
- UNASSIGNED
- Winterfell
- ZCorp

Active

Profile | User Groups | Supervises | Status | Records/Transcript | **Token Account**

Token Account

Below is a breakdown of the token balance.
You can adjust existing token values by specifying a new token value for each set of tokens.
A value of zero will remove the tokens.

Token Value	Expiry Date	New Token Value
200	Oct 20, 2020 11:59 PM HKT	<input type="text" value="300"/>

New tokens, with an optional expiry date, can be added to the account.

2 Add new tokens

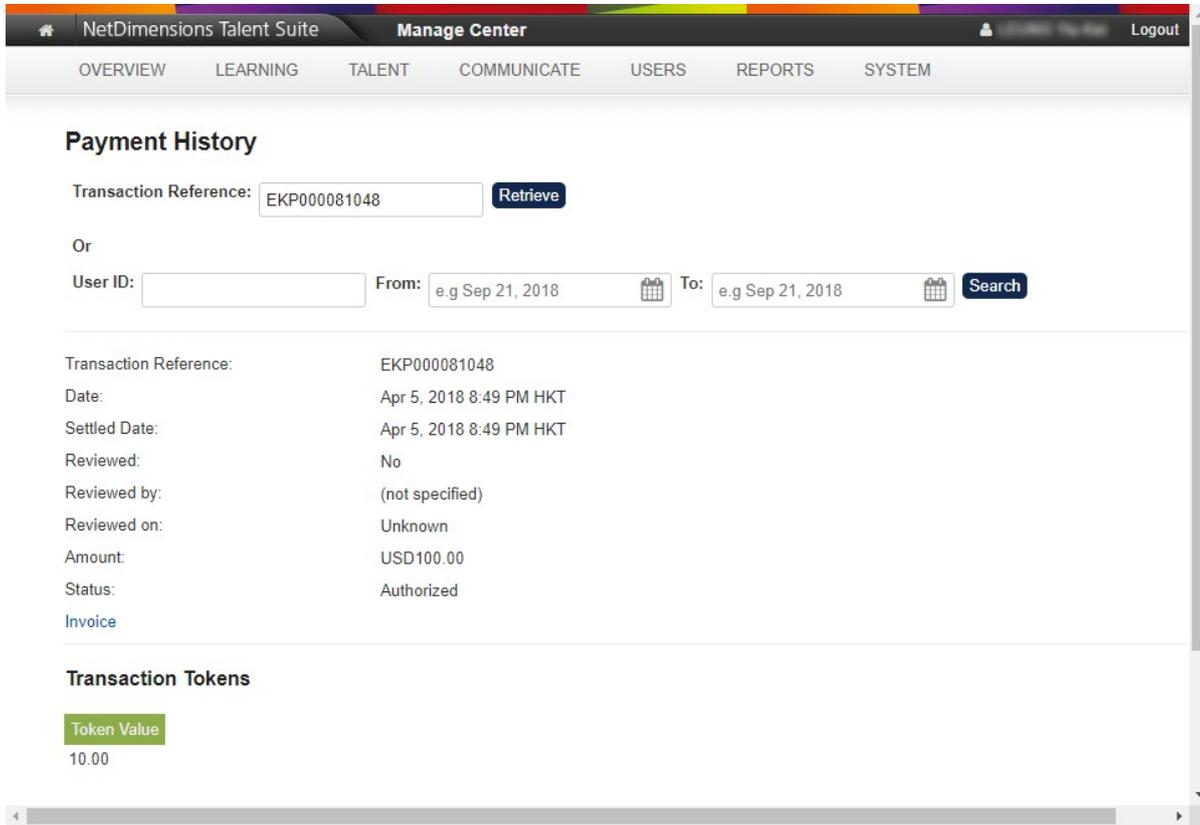
Token Value:

Expiry Date:

Adjust/add tokens

Payment History

Payment History in the LMS shows the transaction history for Token / Course Payments. System Administrators or Users with Manager Roles can access their organizations' history via **LEARNING > PAYMENT MANAGER > Payment History**.



Learners can access their own history via their user profiles > Settings > Payment History Tab.

Token Account Data Loader

The Token Account CSV Loader can initialize token accounts and add tokens to the token accounts. Please refer to the [Token Account CSV Loader](#) Section in [EN145 Data Import / Export](#) for details.

Token Reports

Token Reports are listed under REPORT GENERATORS > System Reports:

- R413 - Token Expiry Help
- R414 - Token Purchase Help
- R415 - Token Manual Adjustment Help
- R416 - Token Balance Help
- R417 - Token Usage

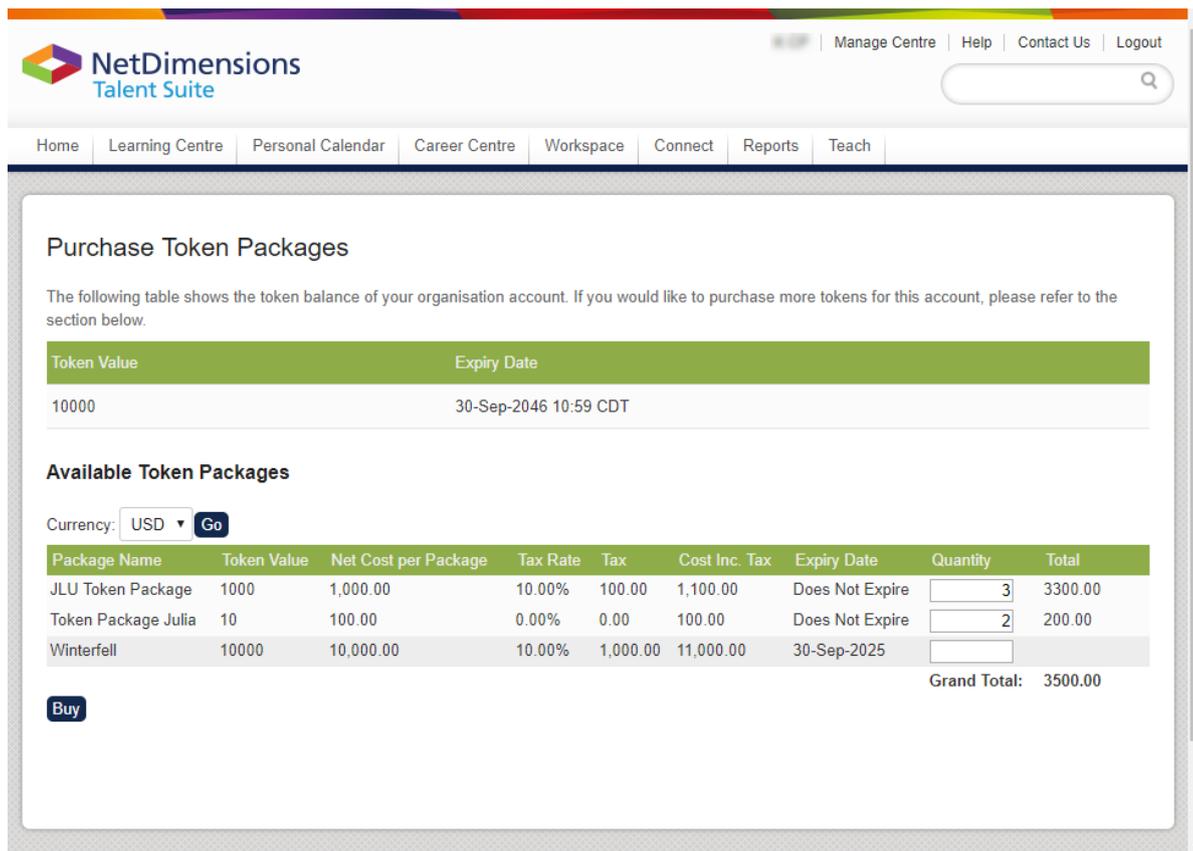
Please refer to the relevant parts under [EN054 PeopleFluent LMS Report Framework > System Report Listing](#) for details.

Learner Operations

Buying Token Packages

To buy a token package, learners need to:

1. Go to **Learning Centre > Tokens**. The top section displays the token balance of the learner’s organization, and the **Available Token Packages** Section displays the token package(s) available for purchase.



2. Enter the quantities of the package(s) to buy. The System will calculate the Total and Grand Total.
3. Click Buy to start the payment process. Once finished, the learners will receive a confirmation email with purchase details from the LMS.

INVOICE
 NETDIMENSIONS TOKEN PURCHASE
 17/F Siu On Centre
 Wan Chai
 Hong Kong
 Tel +852 21224500

Customer details
 Super Commerce Ltd
 12 Tree Lane, Ealing.
 London
 W5 2AD

Invoice Details
 Invoice No: 4CF4AD434DA482B3B2E19913D6D9C3300AD26467
 Invoice Date: November 30, 2010 3:50:17 PM CST

Below is a breakdown of the tokens purchase:

Tokens	Expiry Date	Net Cost	Tax	Tax Rate	Gross
500	May 30, 2011 3:50 PM CST	USD 500.00	USD 16.50	3.30%	USD 516.50
1000	Nov 30, 2011 3:50 PM CST	USD 1,000.00	USD 33.00	3.30%	USD 1,033.00
	Total Cost:	USD 1,500.00	USD 49.50		USD 1,549.50

Total number of tokens purchased = 1500.
 Total Token Cost Excluding Tax = USD 1,500.00
 Total Token Tax = USD 49.50
 Total Token Cost Including Tax = USD 1,549.50



Learners will not be able to purchase a token package in a currency that the configured payment gateway does not support.

Using Token to Buy Courses

If the enrollment policy of a course allows token purchase, learners can buy it themselves with tokens. The course's List Price and Optional Costs will be debited from the learners' token account.

Prerequisites:

Objectives:

- recognize the benefit of determining why teams stop producing.
- Lesson 1 Preassessment
- identify what behaviors leaders should exhibit.
- specify how to communicate an organizational vision.
- identify the characteristics a healthy team environment.
- choose the appropriate incentives given a situation.
- Lesson 1 Mastery
- recognize the importance of determining how conflict escalates.
- Lesson 2 Preassessment
- specify why work situations turn personal.
- identify the signs of conflict.
- order the steps to getting conflict out in the open.
- identify some root causes of conflict.
- Lesson 2 Mastery
- recognize the value of targeting team problems.
- Lesson 3 Preassessment
- specify how traditional process measurements contribute to team conflict.
- identify how to turn faulty communication into effective team communication.
- specify how perceptions can differ enough to promote conflict.
- Lesson 3 Mastery
- recognize the importance of discussing problems as a team.
- Lesson 4 Preassessment
- identify effective facilitation strategies.
- specify the steps to brainstorming and categorizing problems.
- match the tool to its correct description.
- Lesson 4 Mastery

More Information:

Wiki Link: <http://wikidemo.netdimensions.com>

Support Contact:

Session(s): Analyzing Workplace War Zones (TEAM0212) Seats: Unlimited

Payment Method: Token

List Price:	20.00 Tokens/Credits
Price Info:	Cost
Optional Cost(s):	
Study_Materials	3.00 Tokens/Credits (% of Course Cost)
Reference_Books	10.00 Tokens/Credits (Per Unit)

Pay by Tokens

Enrol Other Users

Close [to top of page](#)

Appraisers can also buy courses on behalf of their learners upon approval. The credits will be debited from the organization accounts. The Appraisers can review these transactions in Workspace > Enrollment Approval.

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