PeopleFluent Learning

Token Payments Guide

Contents

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:

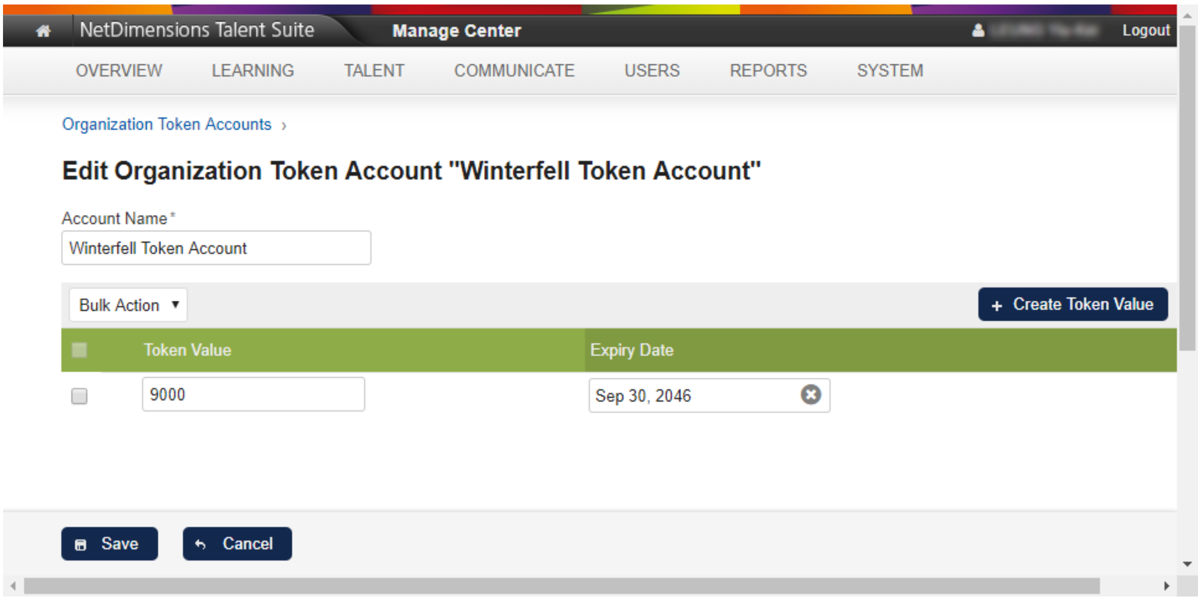
1. Select **Manage Features > Payment Manager**, set the access control of **Token Packages** and **Organization Token Accounts** to **Unrestricted**.
2. Select **Data Access Control > Role General Permissions**, select **Yes** for both **Show Tokens Tab** and **Allow Token Manual Adjustment**.

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:

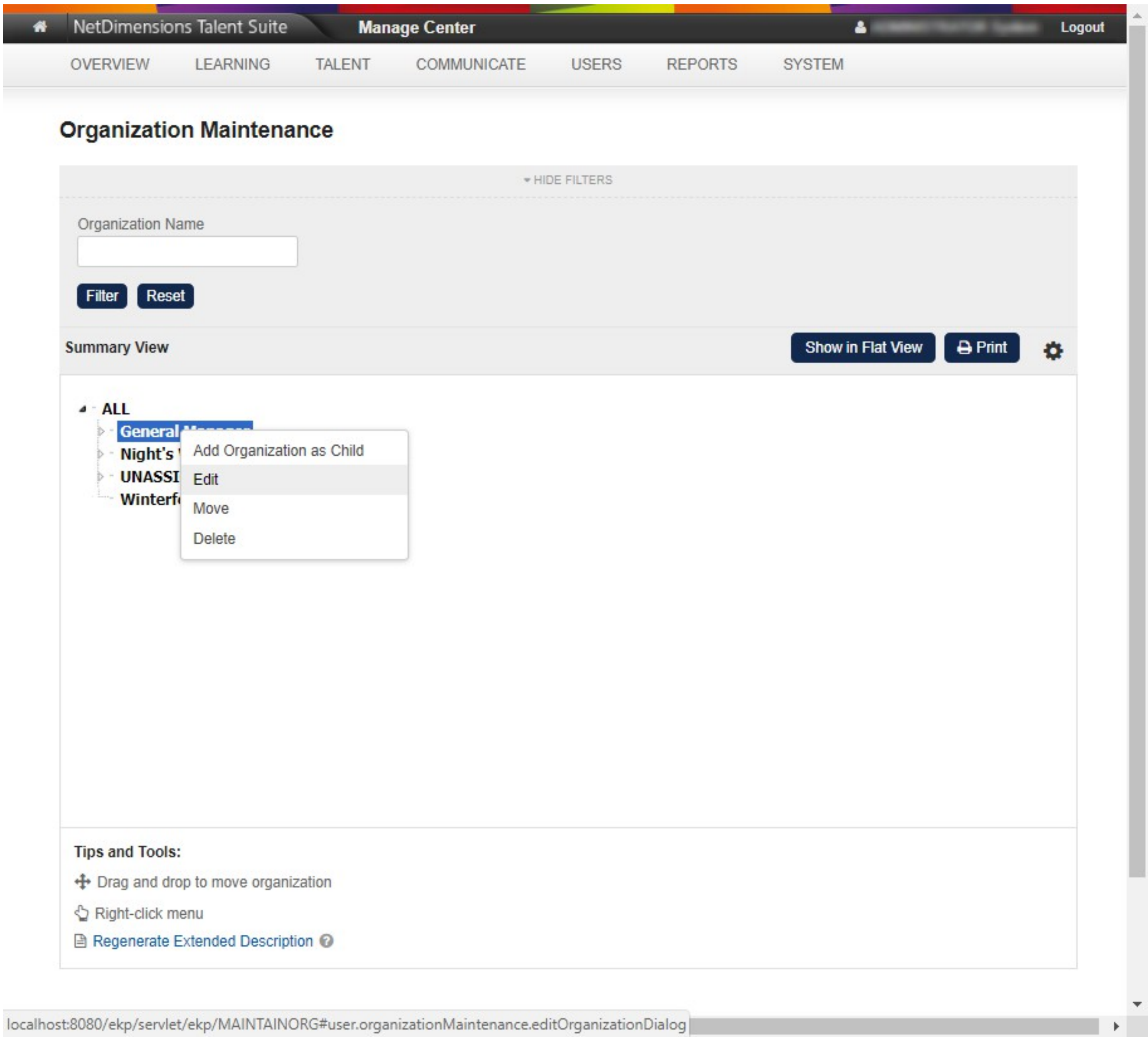
1. Go to **PAYMENT MANAGER > Organization Token Accounts**. Click **+ Create new token account**.
2. Enter a unique **Account Name**. Then click **+ Create Token Value**.
3. Enter the desired **Token Value** and **Expiry Date** (if applicable).



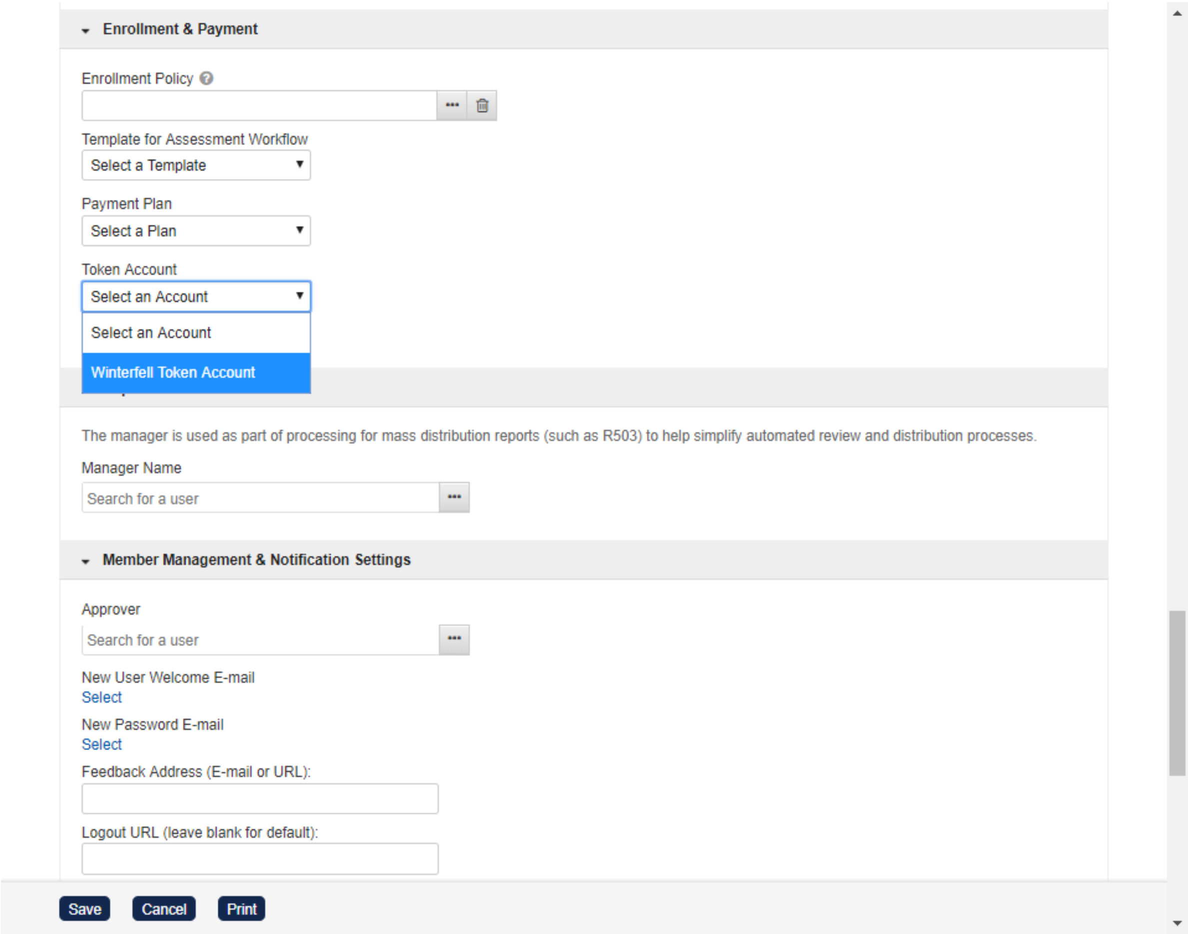
Associating Token Accounts with Organizations

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.

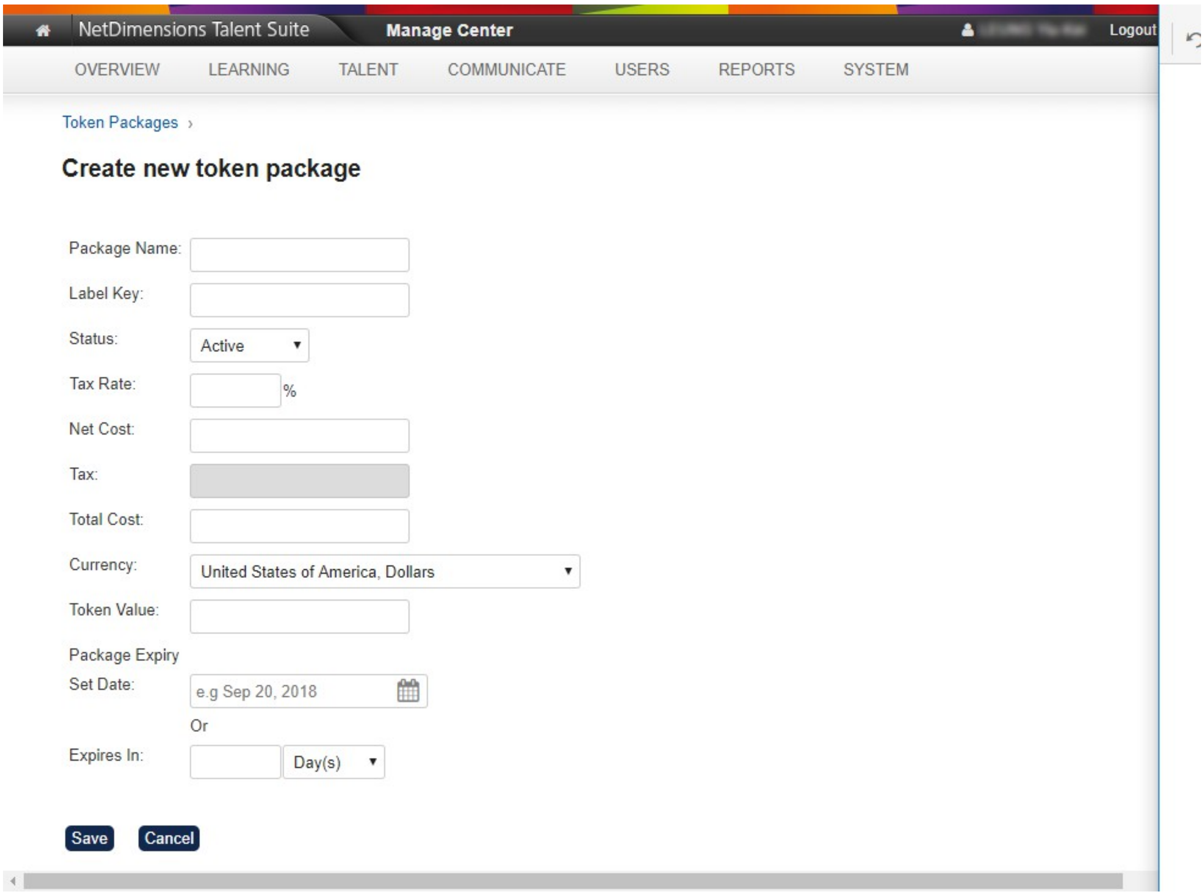

Enrollment & Payment
Enrollment Policy
Template for Assessment Workflow
Select a Template
Payment Plan
Select a Plan
Token Account
Select an Account
Select an Account
Winterfell Token Account
The manager is used as part of processing for mass distribution reports (such as R503) to help simplify automated 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.

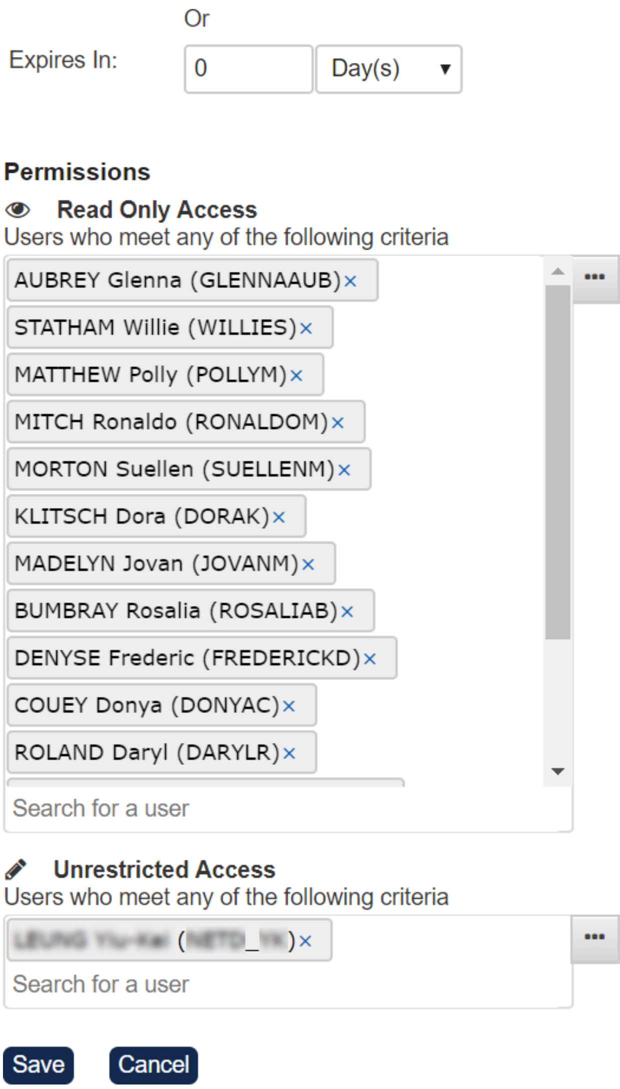


Field	Description
Package Name	A unique name to identify each package
Label Key	A name of the key in the customs.properties file with package name in a language other than English
Status	Status of the package (Active / Suspended). Only active packages can be purchased.
Tax Rate	Tax rate in percentage
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:
0
Day(s)
Permissions
Read Only Access
Users who meet any of the following criteria
AUBREY Glenna (GLENNAAUB)×
STATHAM Willie (WILLIES)×
MATTHEW Polly (POLLYM)×
MITCH Ronaldo (RONALDOM)×
MORTON Suellen (SUELLENM)×
KLITSCH Dora (DORAK)×
MADELYN Jovan (JOVANM)×
BUMBRAY Rosalia (ROSALIAB)×
DENYSE Frederic (FREDERICKD)×
COUEY Donya (DONYAC)×
ROLAND Daryl (DARYLR)×
Search for a user
Unrestricted Access
Users who meet any of the following criteria
Search for a user
Save
Cancel

Setting Token Costs for Courses

(Applies to NetDimensions Performance NetDimensions Learning NetDimensions eLearning)

To set up courses for purchase with tokens:

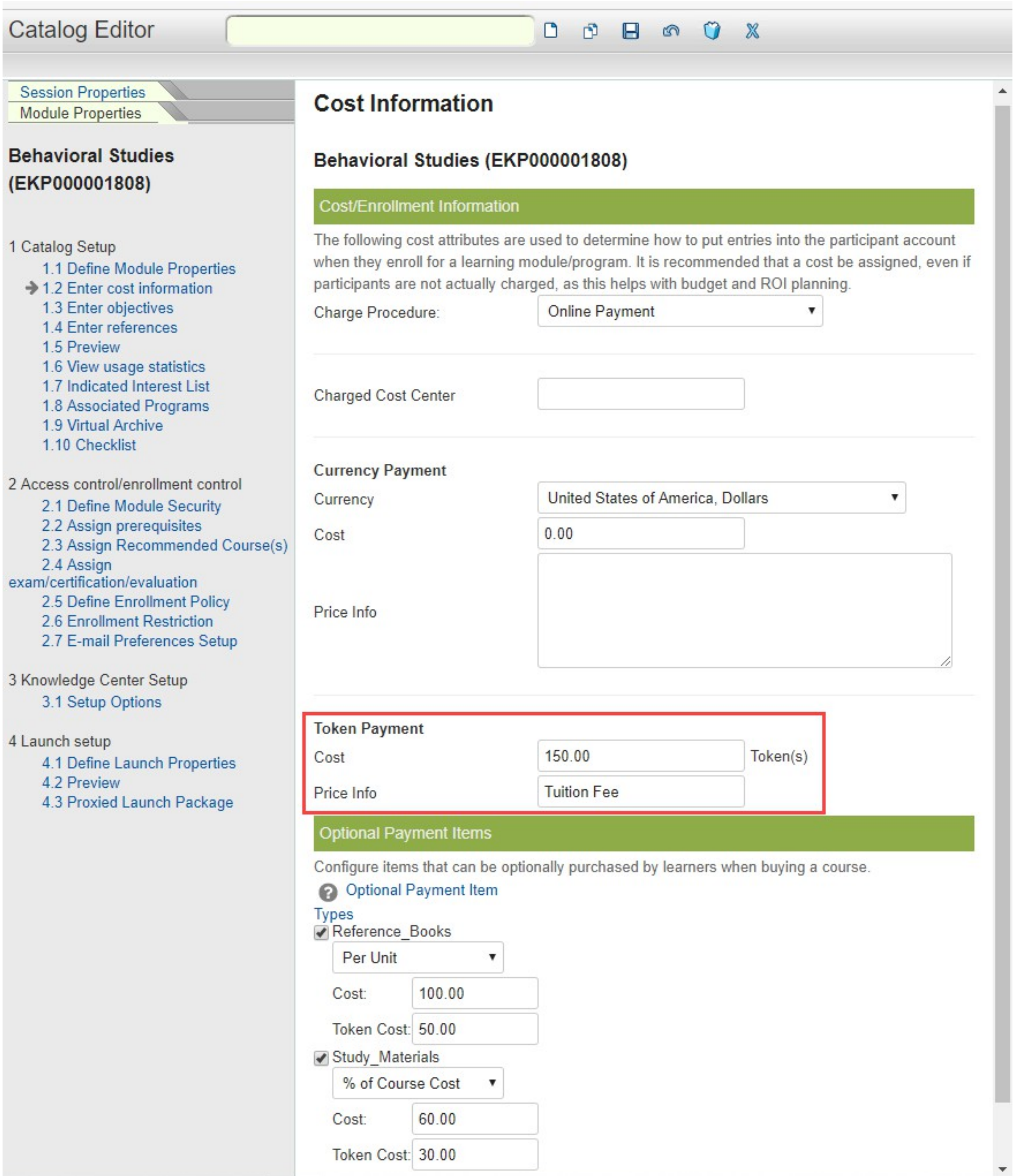
1. Go to the Catalog Editor of the target course. Click Catalog Setup > Enter Cost Information in the left navigation pane.
2. For tokens, you can use one of the following Charge Procedures:

    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.

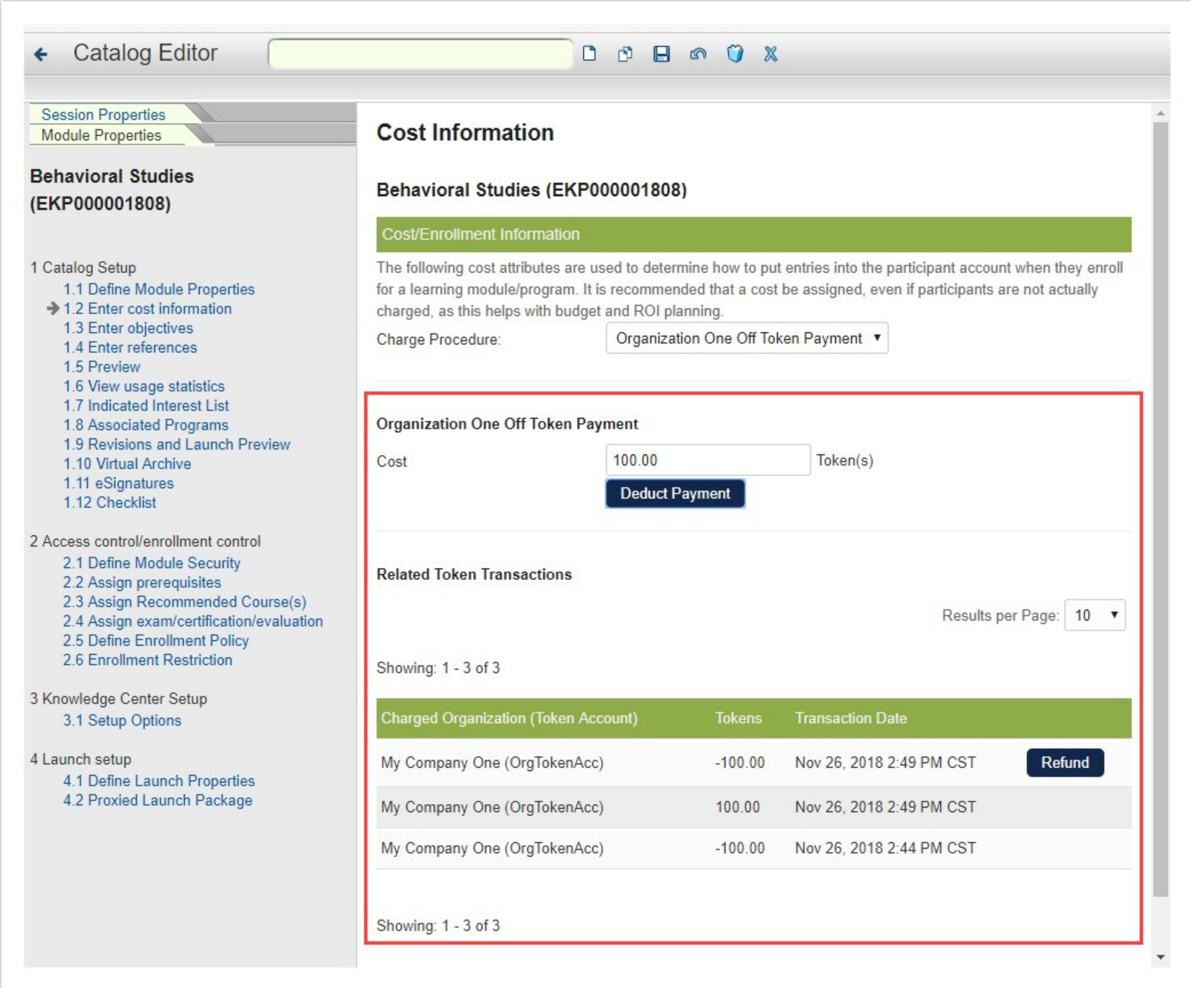


Organization One Off Token Payment

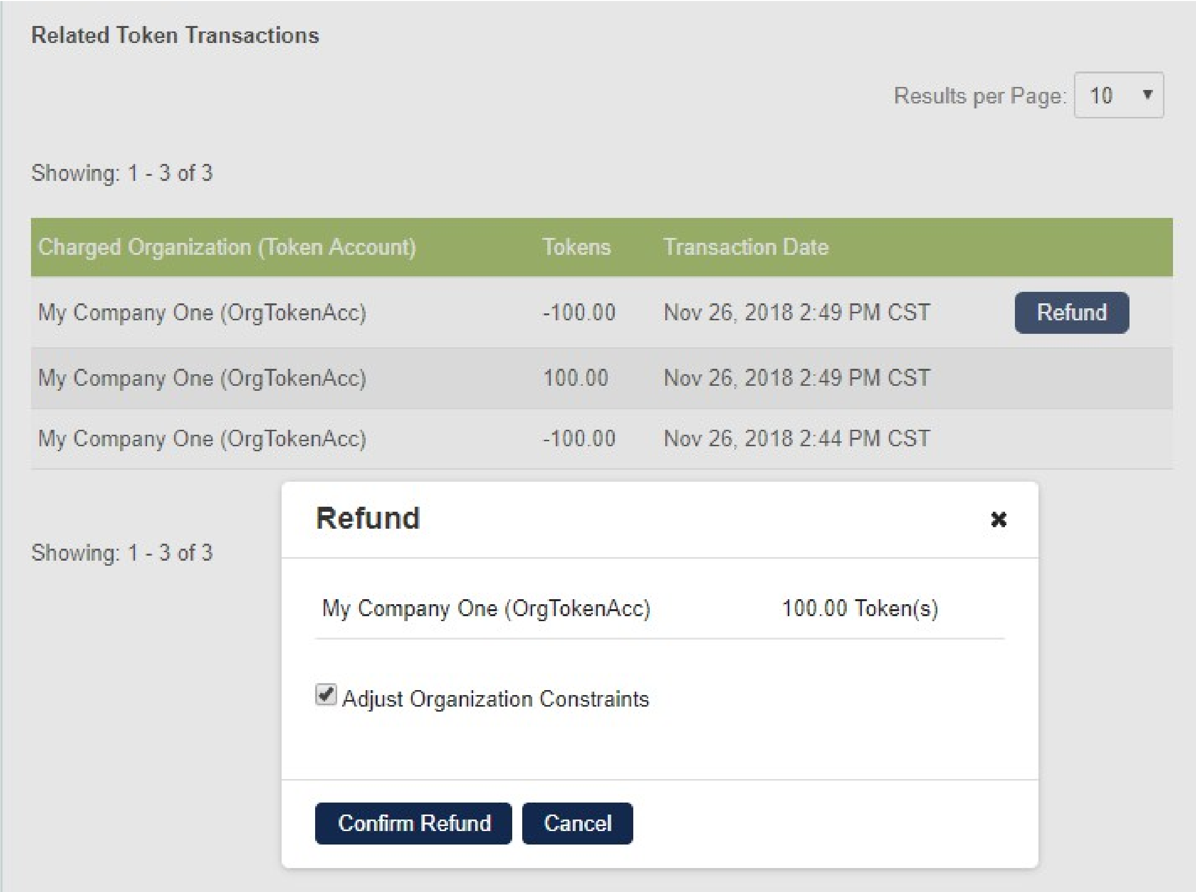
Organization One Off Token Payments allows an Administrator to charge a one-off lump sum for an entire module or session and debit this amount from the organization token account instead of charging per individual learner enrollment.

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:



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

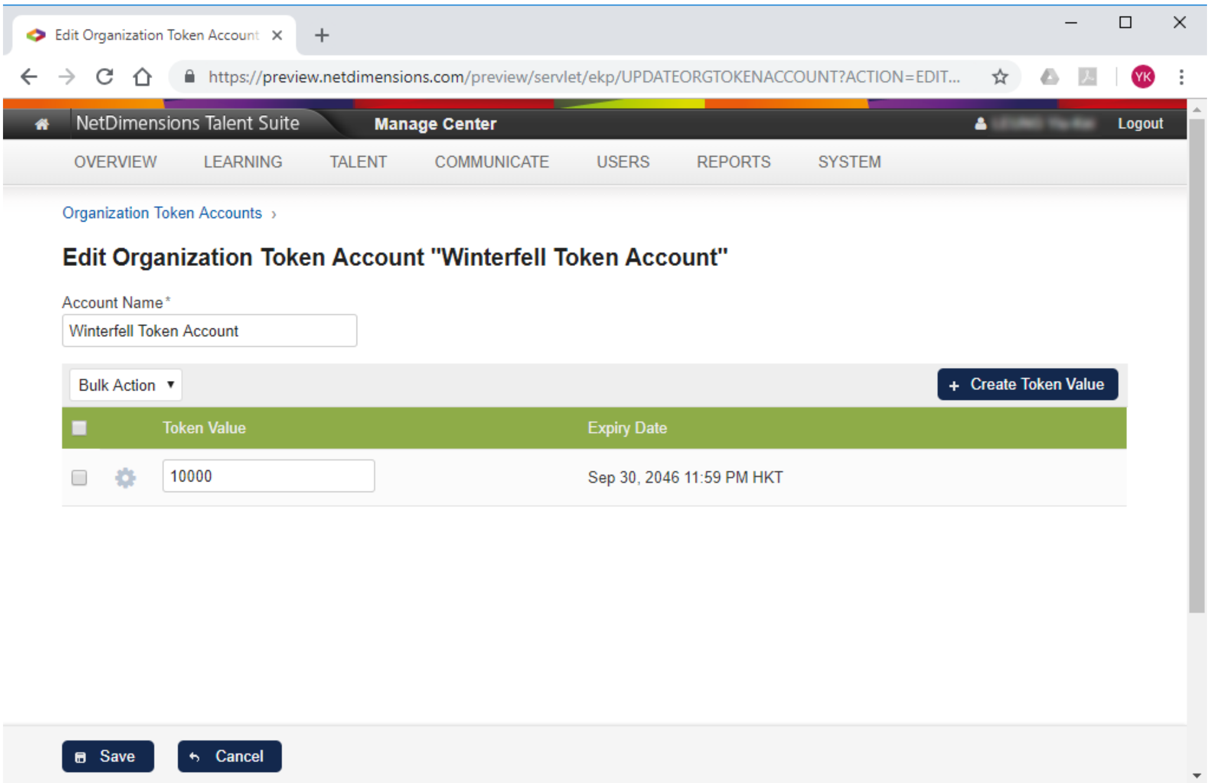
Token Adjustments

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

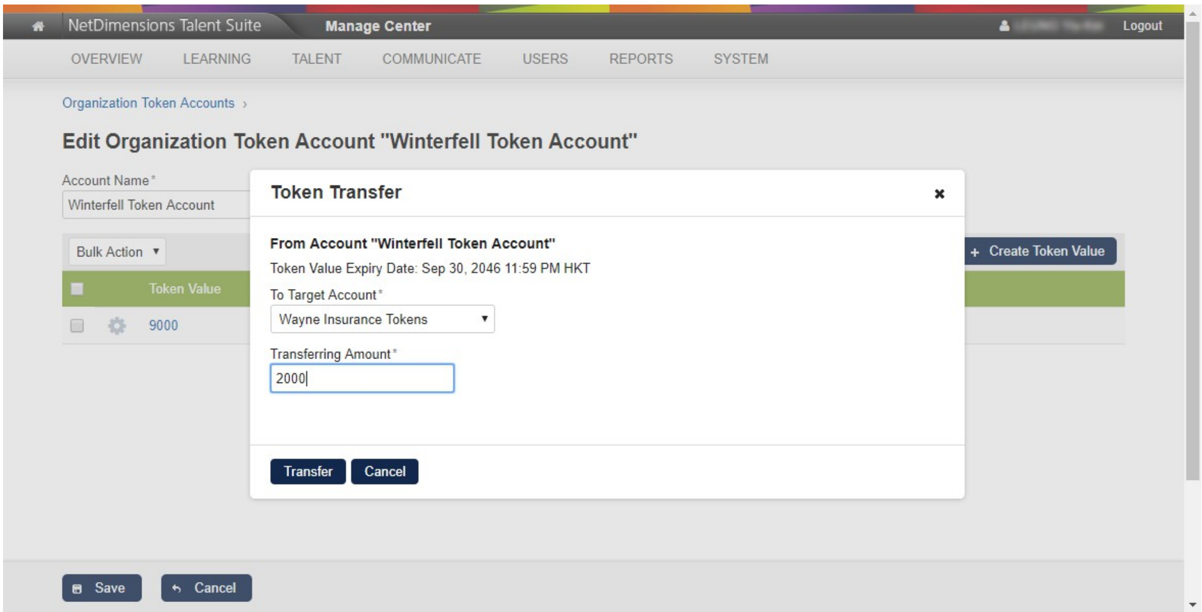
Organization Token Accounts

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.



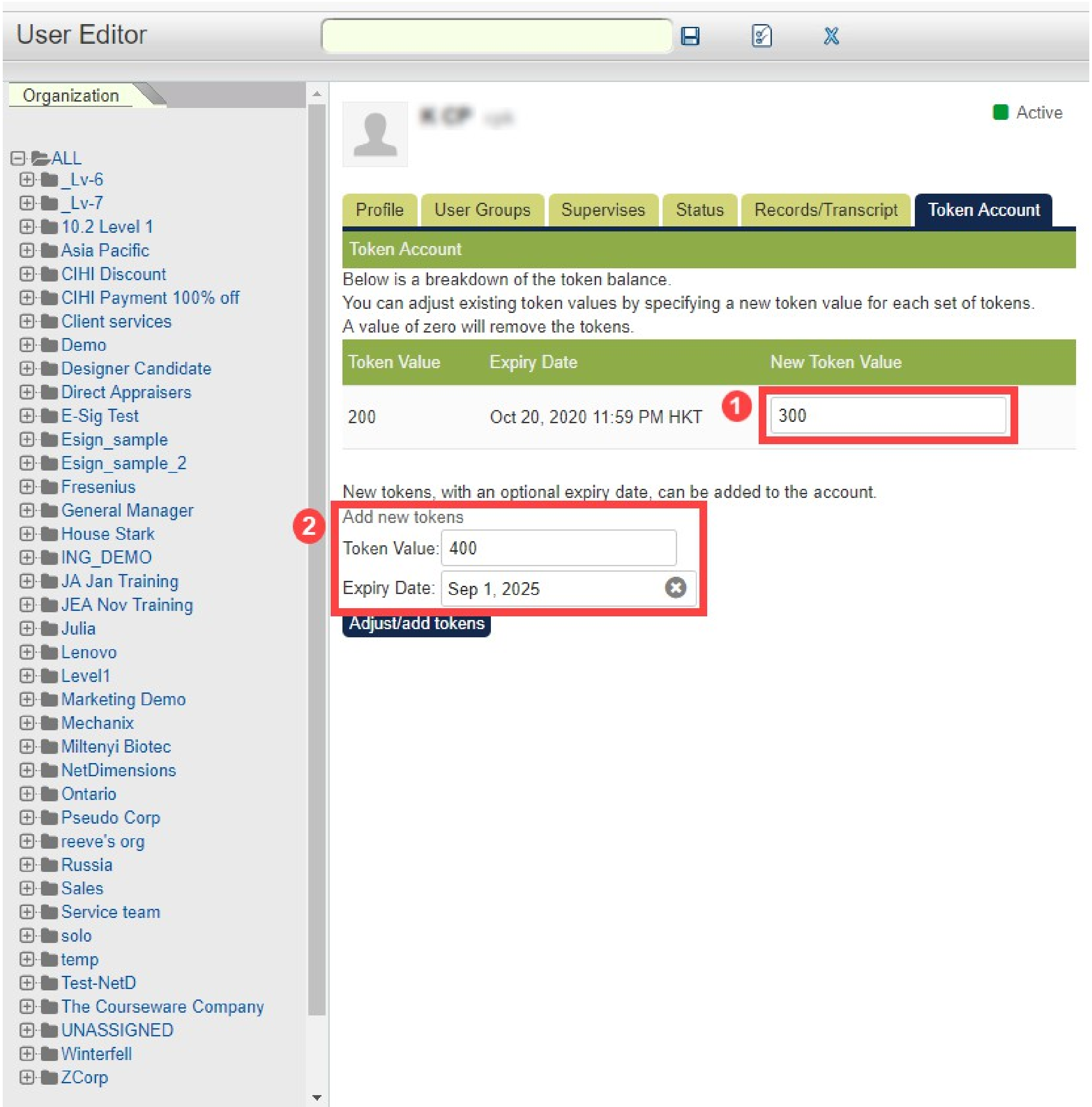
The Administrators can transfers tokens across different departments within their organization by clicking **Transfer** under the Cog icon.



User Token Accounts

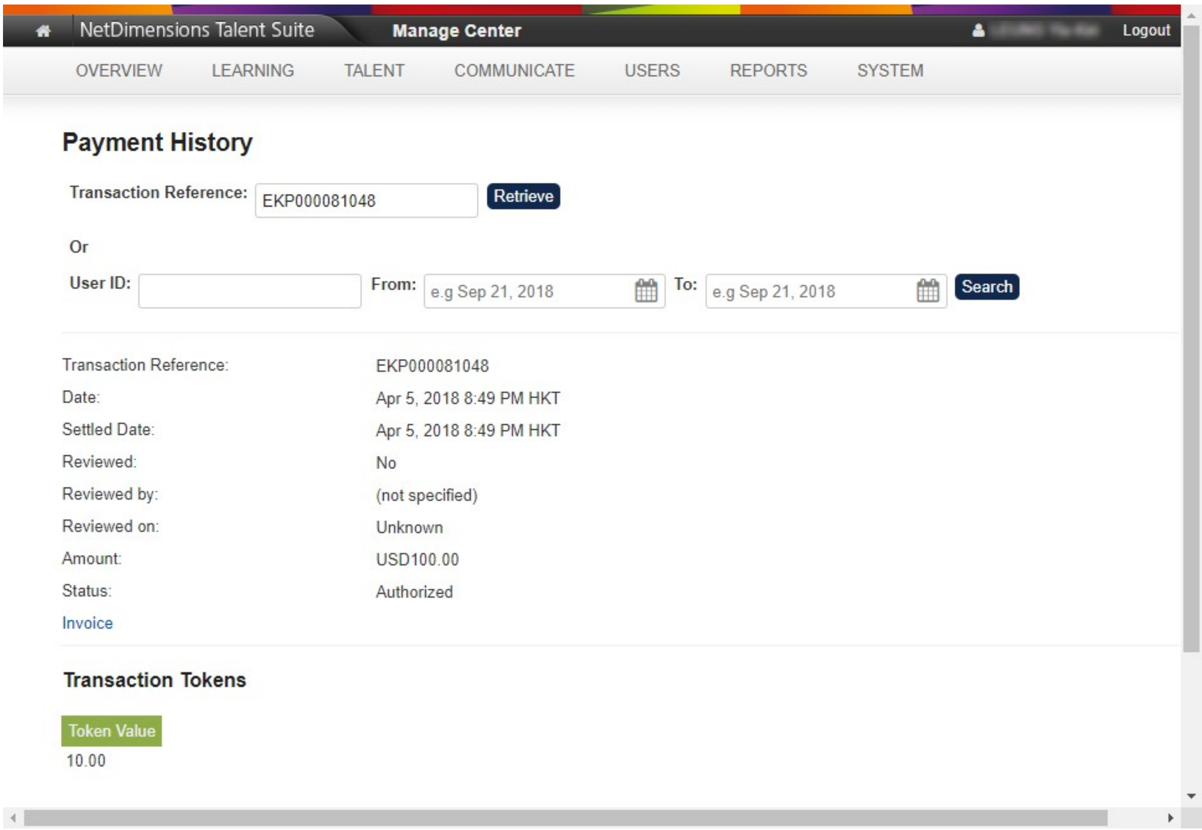
Token values are adjusted on the **Token Account** Tab in the **User Editor** of the desired Users.

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
1
300
New tokens, with an optional expiry date, can be added to the account.
2
Add new tokens
Token Value: 400
Expiry Date: Sep 1, 2025
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

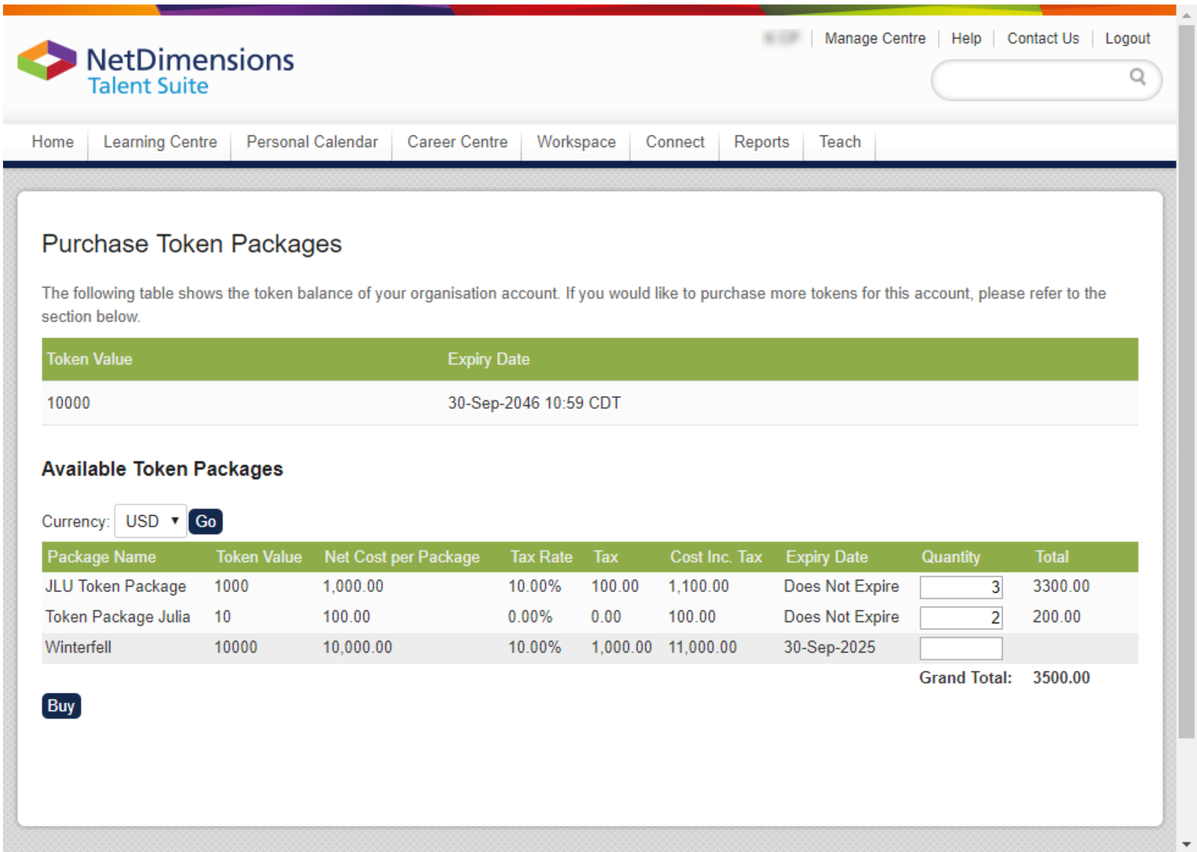
Please refer to the relevant parts under EN054 PeopleFluent LMS Report Framework > System Report Listing for details.

Learner Operations

Buying Token Pakages

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: 4CF4AD434DA482B3B2E19913D6D9C3300AD25467
Invoice Date: November 30, 2010 3:50:17 PM CST

Below is a breakdown of the tokens purchase:

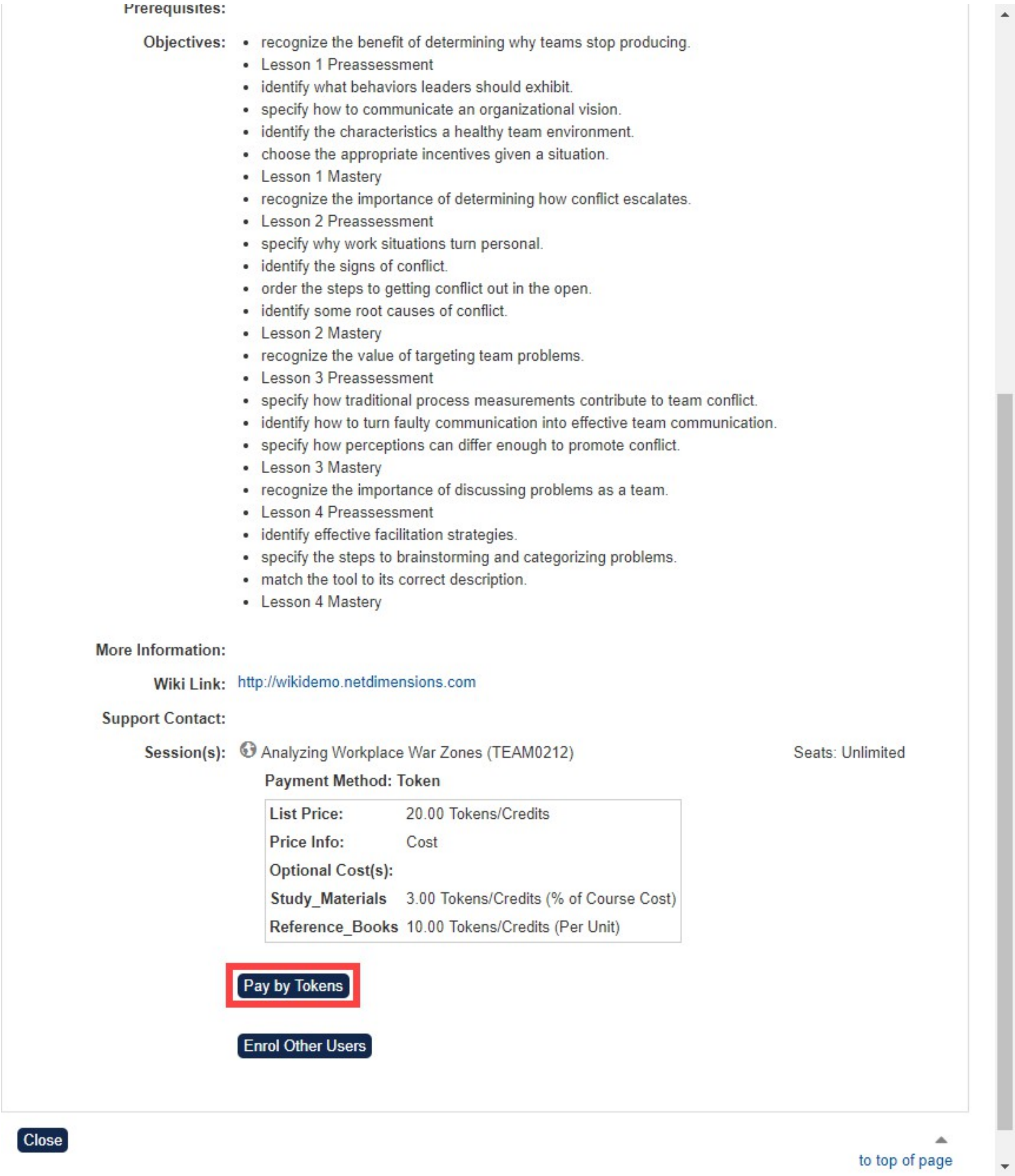
Tokens	Expiry Date	Net Cost	Tax	Tax Rate	Gross
500	May 30, 2011 3:50 PM CST	USD 500.00	USD 16.50	3.30%	USD 516.50
1000	Nov 30, 2011 3:50 PM CST	USD 1,000.00	USD 33.00	3.30%	USD 1,033.00
	Total Cost:	USD 1,500.00	USD 49.50		USD 1,549.50

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.



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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