

lynda.com – Commerce

eCommerce Scope | Summary of the general business rules

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lynda.com
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The purpose of the document is to highlight the scope of the eCommerce system as part of the lynda.com solution, together with a summary of the general business rules that underlie this system.

According to the current lynda.com business rules, **eCommerce** is the lynda.com sub-system that is concerned with selling all the available lynda.com products, physical and non-physical (*including user registration flows, redeeming promotions, purchasing CD/DVD-ROMs, etc.*), together with the post-selling administration of these products (*automatic renewal, upgrade/downgrade plan, etc.*).

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1. Glossary of Terms



- **Definitions**

Account

Each member is required to set up an account upon registration, by specifying a user name and password based on which to be uniquely identified in the system.

Exception to this rule are the lyndaKiosk Users (who don't have to set up an account), for which the validation is done based on their IP, and not based on the pair {user name + password}.

Also, for the lyndaCampus & lyndaEnterprise Users, the terminology used is *profile* instead of *account*.

Authorize.Net

It's a payment gateway service provider used for processing the Credit Card transactions initiated throughout lynda.com.

Billing Agreement

A Billing Agreement is an agreement that the buyer (*our customer*) accepts in the Express Checkout Payment flow, through their PayPal account. Based on this, the merchant (*lynda.com*) can charge the buyer in the future, without being necessary for the buyer to log in.

A Billing Agreement is automatically canceled when the subscription is canceled. It can also be canceled by the user, in which case the PayPal job will fail to collect the payment on the next recurring billing date (this leads to the customer's account getting cancelled).

Billing Job

It's an automated job (part of the Nightly Job), which handles the recurring payments in case of auto-renewal accounts paid by Credit Card. It's also responsible for expiring/renewing these accounts, downgrades, and others additional actions needed to be performed upon user accounts.

Note: The Billing Job only processes Future Bills, overlooking Future Invoices which need to be manually handled from the Admin site by the Customer Support/Sales representatives.

Bills

These documents are created only as future documents (and thus are actually called "future bills" in everyday talks), referring to an initial order as a base document. They are created only in case of auto-renew accounts paid by Credit Card or PayPal, after the previous document (order, or future bill, depending on the case) gets paid in full, and are due on the expiration date of the previous document. Bills are always paid by Credit Card or PayPal, and always charged through Billing Job.

A bill can pass through the following statuses:

- Open – when first created
- Paid – after the amount on the bill is captured by the Billing Job
- Problem – in case the Billing Job fails to charge the customer's Credit Card or PayPal account for the given amount
- Cancelled – in case the user opt out of the subscription

Documents

They can be considered as 'contracts' between customers and lynda.com, used as a base for charging customers accounts and for granting access to their accounts.

An important characteristic of the lynda.com documents is that they can only contain a single product at a time, excepting the Gift Subscriptions, which can appear several on a single document.

Customer access to their account is possible based on an active document only. A document is either activated automatically by the system upon payment, or manually by the Customer Support/Sales representatives before payment is received, as a means of good faith.

Invoices

These are documents that get created in the following case:

- when the payment method chosen during a registration flow is Purchase Order (this means that the actual payment can be performed by check, money order or wire transfer)
- as future document in case of auto-renew accounts (called “future invoices” in this case), when the first document created for that subscription was paid by Purchase Order.

An invoice can pass through the following statuses:

- Open – when first created
- Partially paid – after a partial payment is received
- Ordered – in case it was paid in full
- Cancelled – in case the customer opts out of that subscription

In case of future invoices, they are created only for auto-renew accounts that are paid by Purchase Order, and only after the previous document (invoice, or future invoice, depending on the case) is paid in full, being due on the expiration date of the previous document.

Orders

These are the most used documents, being created in the following cases:

- when payment is done by Credit Card or PayPal on the registration process (either from the Public or the Admin sites)
- when the registration does not require a payment
- when the first invoice (created in case the selected payment method is Purchase Order) is paid in full

An order might pass through the following statuses:

- Open – document created for auto-renew accounts
- Completed – document created for not auto-renew accounts (*it might not be used on all flows, and the developers suggested that it should be removed*)
- Cancelled – when the customer’s account is cancelled, in the following situations: the customer cancels its auto-renew subscription from the Public site, a Customer Support representative cancels the subscription from the Admin site at the customer’s request, a Customer Support representative cancels the subscription due to abusive usage or due to other objective reasons, the document automatically gets cancelled when the customer redeems a promotion corresponding to a Premium subscription while having a Standard subscription active)
- Cancelled with Refund – in case the Customer Support representative decides to offer a refund when cancelling a given customer’s account
- Billing Problem – this is the status an order will get if the Billing Job fails to charge the

customer's auto-renew account for any future bills related to the order

Note: Although there is another order status in the DB, titled "Cancelled with Credit", this was never actually implemented and used, remaining in the idea state.

Payment Methods

As payment methods, we offer the following options:

- Credit Card – the transactions are processed through Authorize.Net
- PayPal
- Purchase Order – payment can be made by either Check, Money Order or Wire Transfer

Note: In the DB there is also "Credit" as a payment method, which was initially added in order to accommodate the possibility of accumulating lynda.com Credit which could have been further used in subsequent purchases – but this was never implemented so far.

Payment Types

Available payment types:

- Payment – representing any amount of money coming from the customers
- Refund – representing any amount of money that is given back to the customers for different reasons (mainly it's used in cases when customers cancel their subscription based on legit complaints). Refunds usually use as payment method the Check

Note: There are also the Royalties, which are payments directed towards the authors, but this is another category which will not be covered in the present document.

Payment Statuses

We have the following possible payment statuses:

- Pending – this status is only used for Refunds, which are found in this state from the moment the corresponding document is created by the Customer Support personnel and until the check is issued/sent to the customer
- Confirmed – successful payment
- Failed – failed payment

Payments failure mechanism

For every bill we make a maximum of 2 attempts to process the transaction.

Successful payment on the 1st attempt: the bill status is set from Open to Paid and a new bill is created for the future period.

Failed payment on the 1st attempt: the bill status is set to Problem and an email is sent to the customer in order to inform him/her that there was a problem with the payment. The customer's OTL access is not removed at this point. After 2 days, the Billing Job attempts again to process the transaction.

Successful payment on the 2nd attempt: if the second attempt succeeds, the bill status is set from Problem to Paid, and another bill is created for the future period.

Failed payment on the 2nd attempt: if the second attempt fails, the customer's OTL access is removed without any notification sent by email on this matter. And no other attempts will be made by the Billing Job to pay this bill.

PayPal & PayPal Job

PayPal is an American-based global e-commerce business allowing payments and money transfers to be made through the Internet. Online money transfers serve as electronic alternatives to paying with traditional paper methods, such as checks and money orders.

This payment method is only available for now to Consumers within the Registration and Renewal flows performed from the Public site.

For PayPal recurring billings, we implemented a job similar to the Billing Job, called **PayPal Job**, which behaves about the same as described above for the Billing Job.

Persona

It mainly indicates the role of a customer within the lynda.com customers hierarchy, based on their subscription. We can have the following possible values for this attribute:

- Consumer – this is a member that has purchased one of the individual subscriptions (Monthly, Monthly Premium, Annual, Annual Premium). Payment: the Consumer pays for the subscription.
- Master Admin – this is the administrator of a lyndaPro, lyndaCampus or lyndaKiosk accounts. It's the only persona that is shared among several subscription types, and need to be differentiated based on the product. In this case the Master Admin pays for the subscription.
- Educator – this is an educator that has purchased a lyndaClassroom subscription. Payment: the Educator has the possibility to choose who pays for the subscription – himself/herself or the students invited to join the class
- Student – this is a student that has received an invitation from an Educator to join a class. Payment: depending on the Educator's choice, the Student might have to pay for the class (if the Educator chose not to pay for it)
- lyndaPro User – this is a member that has received an invitation from a lyndaPro Master Admin to join one of his/her groups. Payment: the lyndaPro User doesn't pay for the subscription (this is covered by the lyndaPro Master Admin)
- lyndaCampus – this is a member that has created a lyndaCampus profile based on a subscription purchased by a lyndaCampus Master Admin. Payment: the lyndaCampus User doesn't pay for the subscription (this is covered by the lyndaCampus Master Admin)
- lyndaKiosk User – this is an indicator of the members using a lyndaKiosk account, but it doesn't refer to a specific consumer like in the other cases, since these users don't register with a user name and password like the other personas. The system automatically creates a lyndaKiosk User for each range of IPs specified by the lyndaKiosk Master Admin, but these credentials are not revealed to the users of the lyndaKiosk subscription, nor are they relevant to them. Payment: the lyndaKiosk User doesn't pay for the subscription (this is covered by the lyndaKiosk Master Admin)
- Purchaser – this is a member or non-member that purchases one or more Gift Subscriptions. In case the user is a non-member, the user is required to create an account with user name and password during the Gift Subscription purchase flow, based on which the system automatically creates a Purchaser Persona for this account. Payment: the Purchaser pays for the Gift Subscription, not the beneficiary of it
- Author – when an author is created from the Admin site, the system automatically associates an

Author persona to them

It is possible for an account to have several Personas associated to it, in which case we use the terminology 'multiple-persona accounts'. There is no limitation on the maximum number of Personas an account can have associated to it. The only limitation is that an account cannot have multiple Personas of the same type associated to it.

Persona Type

It depends on the location where the subscription was purchased from (Public site or Admin site) and whether the member purchased the subscription at full-price or benefited from a promotion. Possible values for this attribute are:

- Regular – the member purchased the subscription at full-price from either the Public site or from the Admin site (with the help of a Customer Support representative)
- Complimentary – these kind of accounts can only be created from the Admin site, for any type of subscriptions except the Gift Subscriptions. Their main characteristics are that the account is free and cannot be auto-renew
- Promo - the member activated a promotion from the Public site

Persona Status

It indicates the status of a given Persona at the current moment. Possible values for this attribute are:

- Active – members with this status have a valid subscription ongoing
- Expired – these are past members whose subscription has expired and has not been renewed
- Cancelled – these are past members who cancelled their subscription for some reason, or have been cancelled by a Customer Support representative due to abusive behavior or at the customer's request, and have not renewed their subscription
- New – these are new members who have started a registration flow, but didn't complete it for some reason; or members who have completed a registration flow, but chose as a payment method Purchase Order, which has not been currently paid
- Billing Problem – these are auto-renew members with subscriptions paid by Credit Card or PayPal, for which the Billing Job or PayPal Job (depending on the case) was not able to successfully process the current transaction

Profile

A *profile* is similar to an *account*, uniquely identifying users in the system, being used for lyndaCampus & lyndaEnterprise Users only. The main difference is that, in some situations, it can be automatically set up and sent through the school/company portal that customers are using, and it only needs to be confirmed by the customers themselves.

Quotes

These are commercial documents with no impact on the lynda.com finance and can be used for generating quotes to possible or existent customers. The quote can be generated for all subscription types, except Gift Subscriptions and Paid Trial subscriptions, and may contain a single product at a time. Quotes can only be created from the Admin site, being the only way of performing certain actions from the Admin site, like upgrading, downgrading, renewing, purchasing more licenses, purchasing new

subscription types for existing customers.

Once the customer accepts the offer made through the quote, the quote can be invoiced, thus turning into an order (plus a future bill, if the account is auto-renew) or an invoice, depending on the selected payment method.

A quote can pass through the following statuses:

- New – when confirmed, but not yet created
- Open – when first created
- Invoiced – when the quote is invoiced and paid by Purchase Order
- Ordered – when the quote is invoiced and paid by Credit Card
- Cancelled – in case it gets cancelled by the Customer Support representative due to various reasons

2. lynda.com

Products



- **Solutions**
- **Managing subscriptions**
- **Available flows by persona**

2.1 Solutions

lynda.com tries its best to keep up with the customers' needs, offering them a wide range of solutions:

Individual Memberships	
Monthly subscription	It's an individual membership, granting access to the Online Training Library® except the exercise files, for a fee of \$25 per month. This subscription can be purchased from both the Public and the Admin site.
Monthly Premium subscription	It's an individual membership, granting full access to the Online Training Library® including the exercise files, for a fee of \$37.5 per month. This subscription can be purchased from both the Public and the Admin site.
Annual subscription	It's an individual membership, granting access to the Online Training Library® except the exercise files, for a fee of \$250 per year. This subscription can be purchased from both the Public and the Admin site.
Annual Premium subscription	It's an individual membership, granting full access to the Online Training Library® including the exercise files, for a fee of \$375 per year. This subscription can be purchased from both the Public and the Admin site.
Business Solutions	
lyndaPro subscription	<p>This is the main corporate product developed by lynda.com, designed to offer company representatives the possibility to buy five (minimum value) or more licenses that are distributed through the company's employees.</p> <p>The product grants full access to the Online Training Library®, including the exercise files, to both the Master Admin (who is the subscription holder, and receives a complimentary license) and his/her Users, for a default period of 1 year .</p> <p>This subscription can be purchased from both the Public site and the Admin site, and is paid by the Master Admin.</p>
lyndaKiosk subscription	<p>This comes as another corporate program, the main differences from the other products is that customers validation is done by IP, not by user name and password.</p> <p>This subscription ensures full access to the OTL for the lyndaKiosk Users, and only limited access (free movies only) for the lyndaKiosk Master Admin, for a default period of 1 year. For full access to the</p>

	<p>OTL, the lyndaKiosk Master Admin needs to log in as a regular lyndaKiosk User (by IP login or through the school portal), not being asked for his/her credentials in this case.</p> <p>This subscription can only be purchased from the Admin site, and is paid by the Master Admin.</p>
lyndaEnterprise subscription	<p>This is another corporate product, recently developed as a faithful copy of the lyndaCampus product (<i>presented below</i>) which combines the advantages of lyndaPro and lyndaKiosk subscriptions: on one hand we have the power of user profiles (similar to lyndaPro) and the ease of administration given by the IP login mechanism (similar to lyndaKiosk).</p> <p>This subscription ensures full OTL access for the lyndaEnterprise Users, and only limited access (free movies only) for the lyndaEnterprise Master Admin, for a default period of 1 year. For full access to the OTL, the lyndaEnterprise Master Admin needs to log in as a regular lyndaEnterprise User (by IP login or through the school portal), and create a profile.</p> <p>This subscription can only be purchased from the Admin site, and is paid by the Master Admin.</p>
Education Solutions	
lyndaCampus subscription	<p>This is another corporate product, which combines the advantages of lyndaPro and lyndaKiosk subscriptions: on one hand we have the power of user profiles (similar to lyndaPro) and the ease of administration given by the IP login mechanism (similar to lyndaKiosk).</p> <p>This subscription ensures full OTL access for the lyndaCampus Users, and only limited access (free movies only) for the lyndaCampus Master Admin, for a default period of 1 year. For full access to the OTL, the lyndaCampus Master Admin needs to log in as a regular lyndaCampus User (by IP login or through the school portal), and create a profile.</p> <p>This subscription can only be purchased from the Admin site, and is paid by the Master Admin.</p>
lyndaPro subscription	<i>See above</i>
lyndaKiosk subscription	<i>See above</i>
lyndaClassroom subscription	<p>This subscription is mainly intended for educational environments, allowing teaching members of educational institutions (referred to as Educators) to create online classes for their students.</p> <p>The product grants Premium access (this includes the exercise files) to a maximum of 5 courses per class to both the students registered to the given class, as well as to the Educator (which receives</p>

	<p>complimentary access to the class courses, for no additional fee), for the entire class duration. Once the class reaches its end date, both the students and the Educator lose their full access to the class courses.</p> <p>This subscription can be purchased from both the Public site and the Admin site, and is paid by the either the Educator or the Students (depending on the Educator's choice).</p>
Government Solutions	
lyndaPro subscription	<i>See above</i>
lyndaKiosk subscription	<i>See above</i>
lyndaEnterprise subscription	<i>See above</i>
Miscellaneous	
Promotions	<p>Promotions are essentially full or partial discounts given to a certain group of people which can gain OTL access (Standard or Premium, depending on the promotion) for a fixed amount of time indicated by the promotion duration. They can also come in the form of discounts applied to the subscriptions available on site, keeping in this case the subscription duration.</p>
Gift Subscriptions	<p>These fall into the promotions category, with the main difference that they can be purchased from the Public site (not available on the Admin site) by a Purchaser, who then offers them to a specific group of Recipients.</p>
Physical Products	
CD/DVD-ROMs	<p>Some of the tutorials included in the OTL are also available as CD or DVD-ROMs, which can be purchased through the Online Store (3rd party system, not integrated on the Public/Admin sites for now).</p>
Accessories & Apparel	<p>Items available on the Online Store only.</p>
Gift Cards	<p>Items similar to Gift Subscriptions, but available as physical products (which can be actually shipped to users) in the Online Store only</p>

2.2 Managing subscriptions

Change Plan (Upgrade)
<p>This action refers strictly to the individual memberships, offering Consumers the possibility to change their current subscription (Monthly, Monthly Premium, Annual) into a superior one (Monthly Premium, Annual, Annual Premium). This option is not available to consumers with Annual Premium subscriptions. The upgrade will be effective immediately -> the current order is cancelled and a new document is created for the new subscription, with start date today.</p>

Change Plan (Downgrade)

This action refers strictly to the individual memberships, offering Consumers the possibility to change their current subscription (Monthly Premium, Annual, Annual Premium) into an inferior one (Monthly, Monthly Premium, Annual). This option is not available to consumers with Monthly subscriptions.

The downgrade behavior depends on the location it was performed from:

- Public site: the change will not be effective immediately. The current documents remain active until the next billing date and a new record is saved into the lynda.dbo.SubscriptionPlanChangeSummary table (indicating a downgrade for the given user). On the next billing date, the Billing Job checks this table for a downgrade option -> if any active found, it will take the following actions: cancel the current order and future bill for the initial subscription, create a new order for the new (inferior) subscription and charge it, create a future bill for the new (inferior) subscription.
- Admin site: the change will be effective immediately. The current order and future bill are cancelled, and credit is determined and applied to the new document that gets created (invoice or order, depending on the payment method chosen).

Upgrade membership

This term has another meaning than in the case of Change Plan Upgrade for Consumers, where they get their current individual membership replaced with a superior individual membership -> in case of any other persona, the upgrade operation implies an extra product (and implicitly extra persona and documents) being added to their account, besides the already existing product(s).

The genuine Upgrade operation can be done from:

- the Public site using the "Upgrade Membership" option (this is visible to all persona except Consumers and lyndaPro Master Admins), which adds an individual subscription and a Consumer persona to the given account
- the Admin site using the "Upgrade to lyndaPro" option (this is visible to all persona except the lyndaPro Master Admins), which adds a lyndaPro subscription and a lyndaPro Master Admin persona to the given account

It's possible though to add any other extra product to a user's account (not just these 2 mentioned above), in which case the operation is not considered an Upgrade anymore, but the logic/behavior behind is just the same.

Renew membership

This option is available to cancelled (but still with OTL access until the end of the current subscription period) or not auto-renew Consumers and lyndaPro Master Admins only, giving them the possibility to ensure uninterrupted access to their accounts for the next subscription periods.

The renewal behavior depends on the location it was performed from and the persona affected:

- Public site: the lynda.dbo.SubscriptionPlanChangeSummary table is used for both Consumers

and lyndaPro Master Admins to indicate the renewal and create new documents when the time comes.

- Admin site: for Consumers, a new document (Order or Invoice, depending on the payment method chosen) is created for the next subscription period, plus a future document (Future Bill or Future Invoice, depending on the case) for the period after that, indicating the auto-renewal. In case of lyndaPro Master Admins, only a new document is created (Order or Invoice, depending on the payment method chosen) for the next subscription period, these types of accounts not being auto-renew when created/altered from the Admin site.

Reactivate membership

This option is used by expired or cancelled members who decide to reactivate their membership, by choosing the same subscription type they initially had (except Student, lyndaPro Users, lyndaCampus Users or lyndaKiosk Users), or by choosing a different subscription type.

In this case, new documents are created for the current subscription period and the (new) product, and future documents for the next subscription period, if the case (depending on the persona, and the renewal method).

Cancel membership

This action can be performed either by the customers from the Public site, or by the Customer Support representatives from the Admin site at the customer's request or as a result of inappropriate behavior on the customer's side. This option is only available to auto-renew accounts.

The following persona will have the possibility to cancel their membership:

- Consumers – in this case, the current document is cancelled but kept active, and any future document is also cancelled. When the current subscription period reaches the end, the user's membership will not be automatically renewed anymore.

When cancelling an individual membership from the Public site, users still have access to their account until the end date of the current subscription period.

When cancelling an individual subscription from the Admin site, the Customer Support representative has either the option to cancel the user's membership and remove access to OTL immediately, or to cancel the user's membership and allow access to OTL until the end of the current subscription period.

- lyndaPro Master Admins (and, by alliance, their lyndaPro Users) – in this case, since we don't have future documents, the record from the lynda.dbo.SubscriptionPlanChangeSummary table will be set to status = Deleted, indicating that the auto-renew attribute is off, and that the user's membership will not be automatically renewed at the end of the current subscription period anymore.

When cancelling a lyndaPro membership from the Public site, the lyndaPro Master Admin and the associated lyndaPro Users still have access to their accounts until the end date of the current subscription period.

When cancelling a lyndaPro membership from the Admin site, the Customer Support representative has either the option to cancel the user's membership and remove access to OTL immediately (this includes the access of both the lyndaPro Master Admin and the associated

lyndaPro Users), or to cancel the user's membership and allow access to OTL until the end of the current subscription period.

Renewal method flag

This indicates whether a membership will automatically be renewed by the system on its end date (referred to as "auto-renew") or not. All auto-renew accounts should have a future document automatically created besides their current document.

The following persona will have the auto-renew option available:

- Consumers – they are set by default to auto-renew after registering, without the possibility to opt out of it (in case they want to stop the recurrent payments, they need to cancel their membership).

For this type of users, future documents (future bill or future invoice, depending on the payment method chosen) will automatically be created besides their current document.

- lyndaPro Master Admins (and, by alliance, their lyndaPro Users) – they have the possibility to choose during the Registration flow (from Public site only) whether they want to be auto-renewed or not. When registration is done from the Admin site, these accounts are automatically set not to auto-renew, in order to avoid further complaints from the users (since the amounts involved in this case are much more significant than in the Consumers' case)

For this type of users, there will be no future documents created in case of auto-renew accounts. Instead, the lynda.dbo.SubscriptionPlanChangeSummary table will be used in order to indicate the renewal for the next subscription period (just like in the case of Downgrade for Consumers).

Note: For existing lyndaPro Master Admins, the renewal method can be modified from Admin >> Customer Details page by the Customer Support representatives.

2.3 Available flows by persona

The different flows available on site are persona-dependent and location-dependent (Public site = P, Admin site = A):

Flow	Consumer	lyndaPro Master Admin	lyndaPro User	Educator	Student	lyndaCampus / lyndaEnterprise Master Admin	lyndaCampus / lyndaEnterprise User	lyndaKiosk Master Admin
Registration	P / A	P / A	P	P / A	P	A		A
Create Profile							P	
Complimentary Account	A	A		A		A		A
Comp Extension	A	A		A	A	A		A
Grant OTL Access (Activate Invoice)	A	A		A		A		A
Apply Payment to Invoice	A	A		A		A		A
Upgrade Membership (Change Plan)	P							
Upgrade Membership				P	P			
Upgrade Membership (New Quote)	A							
Upgrade to lyndaPro	A		A	P	P		A	A
Downgrade Membership (Change Plan)	P							
Downgrade Membership (New Quote)	A							
Renew Membership	P	P						
Renew Membership (New Quote)	A	A				A		A
Earlier Renewal (Pay Future Bill)	A							
Cancel Membership	P	P						
Cancel Membership (Cancel Order)	A	A				A		A
Cancel Membership (Cancel Invoice)	A	A				A		A
Reactivate Membership	P / A	P / A	P / A		P / A			
Purchase More		P						
Purchase More (New Quote)		A		A		A		A

Flow	Consumer	lyndaPro Master Admin	lyndaPro User	Educator	Student	lyndaCampus / lyndaEnterprise Master Admin	lyndaCampus / lyndaEnterprise User	lyndaKiosk Master Admin
Additional Persona (New Quote)	A	A	A	A	A	A	A	A
Create Class				P				
Add Students to Class				P				
Cancel Class				P				
Cancel Educator-paid Class (Cancel Order)				A				
Cancel Educator-paid Class (Cancel Invoice)				A				
Cancel Student-paid Class (Cancel Order)					A			

3. Promotions & Gift Subscriptions



- **General overview**
- **Available flows**

3.1 General overview

Promotions are essentially full or partial discounts given to a certain group of people which can gain OTL access (Standard or Premium, depending on the promotion) for a fixed amount of time indicated by the promotion duration. They can also come in the form of discounts applied to the subscriptions available on site, keeping in this case the subscription duration. Or we can have special kinds of offers or Marketing items also referred to as 'promotions', which round up the income of our affiliates or simply help our Marketing strategy.

Depending on the amount to be paid for the promotion, the location they can be accessed from, the targeted beneficiary, we can have several promotion types/categories:

Promo Category	Promo Type	Description
FREE	Paid Search	<p>Promotions of this type automatically get created by the system whenever a person accesses lynda.com through a Google search result.</p> <p>These are not genuine promotions, since there is no end-beneficiary. They are simply used to track down the most common search keys in Google, in order to evaluate which of them are worth paying for.</p>
	Gift Subscription	<p>In this case we have a Purchaser who buys the Gift Subscription (which grants OTL access for different time intervals: 1-month, 3-month, 6-month, 12-month, 12-month Premium) in order to offer it to an acquaintance. A Gift Subscription can be redeemed only once, but other than that there are no other limitations: the Purchaser can buy as many Gift Subscriptions as desired, and the receiver of the Gift Subscription can redeem as many as he/she has (even several at the same time).</p>
	Affiliate	<p>Promotions of this type automatically get created by the system whenever a potential member accesses the lynda.com through an affiliate's channel (web site, blog). In this case a browser cookie is set on the user's machine -> in case the user purchases a lynda.com subscription in terms of 30 days (from the same machine/browser where the cookie was set), the affiliate gets remunerated based on certain criteria.</p> <p>A member can help a single affiliate get compensated, and only once in his/her lynda.com membership life.</p>
	Discount	<p>It's a discount code that can be used by all personas, offering a one-time deduction from the amount of a document.</p>

Promo Category	Promo Type	Description
	Premium EDU	This promotion is similar with the Activation Key promotion. It's targeted for Universities, which purchase an amount of keys that are distributed afterwards among the students in order to be redeemed.
	Activation Key	Also called "No Template Activation Key" promotion – can be redeemed by Consumers or new members only, doesn't allow a fee for the promotion period and cannot be set to be followed by a subscription.
	Trial URL	Also called "Standard Template Trial URL" promotion – can be redeemed by Consumers or new members only, doesn't allow a fee for the promotion period and cannot be set to be followed by a subscription.
PAID	Activation Key	<p>Also called "New Template Activation Key" promotion – the New Template is used to customize the landing page of the promotion through several messages. It also allows the Marketing representative to set certain attributes for the given promotion: the amount to be paid for the promotion (but this amount can also be \$0), the subscription type users will have access to through the given promotion, the personas for which the promotion is available, whether the promotion is followed by a subscription or not, the product for the future subscription, the number of times the promotion can be redeem by the same member.</p> <p>It can be redeemed by new members only.</p> <p><i>Note: Currently, the New Template is not used for any live promotion (except testing).</i></p>
	Trial URL	<p>This type of promotion may come in 2 forms:</p> <p><u>New Template Trial URL promotions</u>: the New Template is used to customize the landing page of the promotion through several messages. It also allows the Marketing representative to set certain attributes for the given promotion: the amount to be paid for the promotion (but this amount can also be \$0), the subscription type users will have access to through the given promotion, the personas for which the promotion is available, whether the promotion is followed by a subscription or not, the product for the future subscription, the number of times the promotion can be redeem by the same member.</p> <p><u>Choose Trial Plan M/MP/A/AP promotions</u>: these promotions allow users to choose the product for the promotion period, which will also</p>

Promo Category	Promo Type	Description
		<p>indicate the product for the future subscription.</p> <p>They can be redeemed by new members only.</p> <p><i>Note: Currently, the New Template is not used for any live promotion (except testing).</i></p>

Note: The Paid promotions category is often referred to as Paid Trial. An important detail regarding the Paid Trial promotions is that they are meant to be used by New Customers only. Currently, we're in the process of making a major change to the Paid Trial promotions: adding Credit Card verification on the Promo registration flow. Once this is fully implemented, the present document will be updated accordingly.

3.2 Available flows

Flow	Applies to
Redeem No Template Promotion	<p>New members</p> <p>Active/expired/canceled/billing problem Consumers</p> <p>Non-Consumers</p>
Redeem Paid Trial Promotion	New members
Upgrade from Promo to Regular subscription	Promo members
Purchase Gift Subscription	All members
Redeem Gift Subscription	All members who received a Gift Subscription
Upgrade from Gift Subscription to Regular subscription	All members who redeem a Gift Subscription