

# lynda.com - Commerce

## General business rules

9/30/2011

lynda.com

Ada Miron



## DOCUMENT HISTORY

Version	Date	Author	Comments
v1	07/22/2011	Ada Miron	Initial version
v2	08/31/2011	Ada Miron	Updates since last version: - added the lyndaPro flows - minor adjustments
v3	09/09/2011	Ada Miron	Updates since last version: - added the lyndaClassroom flows - minor adjustments
v4	09/22/2011	Ada Miron	Updates since last version: - added the lyndaKiosk and lyndaCampus flows - added the Promotions flows - minor adjustments
v5	09/30/2011	Ada Miron	Updates since last version: - added the Gift Subscription flows - minor adjustments

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# 1. Documents & Payments



- **Documents description**
- **Payment types / methods / statuses**

## Documents

As a base for charging customers accounts and for granting access to their accounts, lynda.com uses the following types of documents listed below.

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.

Normally, customers have access to their accounts once payment for the current document is received. But the Customer Support representative may choose to grant access to the OTL earlier to certain customers from the Admin site.

Access to the OTL is given by activating the current document, either automatically or manually (from the Admin site). The attributes of a document offering this kind of info are:

- *isActive* flag -> it indicates whether a document is active at a given moment in time or not
- *activateOnOpenDate* flag -> it indicates whether a document with Start Date in the future needs to be activated by the Billing Job on Start Date (with or without payment received in due time)

The screenshot shows the lynda.com admin interface with the following details:

- Header:** lynda.com admin
- Navigation:** CS, Production, Content, Marketing, Finance, CMS, Admin, Reports. Sub-navigation includes Search, New Account, New Quote, Training, Abuse.
- Breadcrumbs:** lynda admin > CS > Search Results > Customer Detail
- Customer Details Page:**
  - Account Info:** Address Type: Contact, Country: United States, First Name: Tyler, Last Name: Adams, UserID: 869458, Username: tadams23, Email: tadams@SLAC, Org Name, Address, Address1, City, State/Region: Alabama, Zip/Postal Code, Phone.
  - Last order/invoice/quote info:** Persona: Consumer, Persona Status: Active, Persona Type: Regular, SAVESU, Product: OTL Premium Annual, Join Date: 8/26/2010.
  - Alerts/Customer Contact Log:** Billing, Invoice, Quote: Open, Expire, Abuse Flag: None, User Watch Type: None, Abuse warning count: 0.
- Modal Dialog:** A confirmation dialog box is centered, asking "You are about to activate this invoice and grant OTL access to the user. Do you want to continue?". It has OK and Cancel buttons.
- Footer:** Welcome Email, Password Retrieval Email, Edit, Customer contacted via Email | Phone | Other, and a link to "Activate OTL".
- Table:** Mgmt table with columns: Billing, Order/Inv/Quote, Pending Pmt, Notes, Usage, Login history, Abuse Details, and Actions. Data rows include: Type, Number, Created Date, Due date, Product, Created By, Status, Amount due, Amount paid, Outstanding Amount, and Actions (containing "Apply payment | Activate OTL").

Fig 1.1 [Admin Site] Customer Details -> Activate OTL

On the same note, a Customer Support representative may choose to remove access to the OTL from customers whose account gets cancelled from the Admin site due to certain reasons. In case access to the OTL is not removed, the customers will be able to access their account until the expiration date of the cancelled subscription.

The screenshot shows the lynda.com admin interface. The top navigation bar includes links for CS, Production, Content, Marketing, Finance, CMS, Admin, and Reports. Below the navigation is a secondary menu with links for Search, New Account, New Quote, Training, and Abuse. The breadcrumb navigation indicates the current path: lynda admin > CS > Search Results > Customer Detail > Order Detail > Cancel Order With Refund. The main content area displays a form titled "Credit/Refund Amount" containing the following information:

Cancel Date:	7/6/2011
Last Usage Date:	7/6/2011
Product Purchased:	OTL Standard Monthly
Amount Paid:	\$25.00
PayPal:	3730840-PayPal-09N75672YV081313C
Subscription Start Date:	5/1/2011
Amount to Credit/Refund:	<input type="text" value="\$25.00"/>

A section titled "OTL Access" contains the message "Customer currently has OTL Access: Yes" and a question "Remove Customer OTL Access:" followed by two radio button options: "Yes" (unchecked) and "No" (checked). A red box highlights this section.

The final section, "Select credit or refund," contains two radio button options: "Refund To PayPal" (unchecked) and "Issue refund check" (unchecked).

Fig 1.2 [Admin Site] Customer Details -> Cancel Account

Below are the tables in the DB listing the available payment methods, and the document types together with their possible statuses:

SQLQuery1.sql - 64...a (lyndauser (96))\*

```

select * from dbo.PaymentMethods
select * from dbo.DocumentTypes
select * from dbo.DocumentStatuses order by documentTypeId

```

Results Messages

	<b>id</b>	<b>created</b>	<b>timestamp</b>	<b>name</b>	<b>description</b>	<b>isInternal</b>
1	1	2009-02-07 01:47:39.190	0x0000000000000000803	Credit Card		0
2	2	2009-02-07 01:47:39.190	0x0000000000000000804	Check		0
3	3	2009-02-07 01:47:39.190	0x0000000000000000805	Money Order		0
4	4	2009-02-07 01:47:39.190	0x0000000000000000806	Wire Transfer		0
5	5	2009-02-07 01:47:39.190	0x0000000000000000807	Credit		1
6	6	2010-06-23 22:04:32.840	0x00000000F805B08	PayPal		0

	<b>id</b>	<b>externalId</b>	<b>created</b>	<b>timestamp</b>	<b>name</b>	<b>description</b>
1	1	78AED041-488E-4DD9-A5B5-796838063E3B	2009-02-07 01:47:39.110	0x00000000000000007E3	Quote	...
2	2	EA460A7C-AAF9-4A2F-85FC-7EE59F73FEDF	2009-02-07 01:47:39.110	0x00000000000000007E4	Invoice	...
3	3	32DF0AFF-CCFA-47E9-BB8A-57FEF02FD43	2009-02-07 01:47:39.110	0x00000000000000007E5	Order	...
4	4	DB21E847-8FD0-4EB5-B41E-4D02CE16C1BF	2009-02-07 01:47:39.110	0x00000000000000007E6	Bill	...

	<b>id</b>	<b>externalId</b>	<b>created</b>	<b>timestamp</b>	<b>documentTypeId</b>	<b>name</b>	<b>description</b>
1	1	10E9B58C-7C9B-46AE-B447-3B00236C1307	2009-02-07 01:47:39.140	0x00000000000000007E7	1	Open	
2	2	7919EB9A-5F54-474E-AEE3-BE80A81156DD	2009-02-07 01:47:39.140	0x00000000000000007E8	1	Invoiced	
3	3	14448ED6-31BC-4FB5-873B-FA3BC32EAA68	2009-02-07 01:47:39.140	0x00000000000000007E9	1	Ordered	
4	4	31057CA4-7C18-457F-A499-F56D6B21DFE9	2009-02-07 01:47:39.140	0x00000000000000007EA	1	Cancelled	
5	14	87BC49CD-197A-4157-993E-3B0469F70DEB	2009-02-07 01:47:39.157	0x00000000000000007F4	1	New	
6	5	BE63655F-E1BA-4802-B3AA-3299332A1498	2009-02-07 01:47:39.140	0x00000000000000007EB	2	Open	
7	6	146A34EF-B001-4818-899E-9B03B76C81B9	2009-02-07 01:47:39.140	0x00000000000000007EC	2	Partially Paid	
8	7	2181CDD7-5C51-420A-BEC1-58E350581636	2009-02-07 01:47:39.140	0x00000000000000007ED	2	Ordered	
9	8	F925A8B0-D5F5-4519-95C9-FAA1AE5A78DF	2009-02-07 01:47:39.157	0x00000000000000007EE	2	Cancelled	
10	9	5EF454E8-A5BD-485B-B18D-9AC599AC746A	2009-02-07 01:47:39.157	0x00000000000000007EF	3	Open	
11	10	0097E600-466E-4A8B-B620-65D9DAEC355B	2009-02-07 01:47:39.157	0x00000000000000007F0	3	Completed	
12	11	D22908CF-75A8-4E35-AD61-D56B691B247A	2009-02-07 01:47:39.157	0x00000000000000007F1	3	Cancelled	
13	12	76EEF780-8A1E-45B6-B59A-EDA47F5B4C40	2009-02-07 01:47:39.157	0x00000000000000007F2	3	Cancelled ...	
14	13	BFB40E2-60CD-4D3F-894D-2264F0CF25E7	2009-02-07 01:47:39.157	0x00000000000000007F3	3	Cancelled ...	
15	15	3CED7B52-82BF-4C12-AD95-4971714B6CEE	2009-02-07 01:47:39.157	0x00000000000000007F5	3	Bill Problem	
16	16	156C55FA-937B-48F2-8923-4A38C23B3FBD	2009-02-07 01:47:39.157	0x00000000000000007F6	4	Open	
17	17	63823187-6748-48EF-BF57-CD77B00476DC	2009-02-07 01:47:39.157	0x00000000000000007F7	4	Paid	
18	18	A7B1BE58-BBC7-4E42-BF79-AF0FFD6E989D	2009-02-07 01:47:39.157	0x00000000000000007F8	4	Problem	
19	19	7DBE47C7-A94D-4230-8AC3-765588FBF95A	2009-02-07 01:47:39.173	0x00000000000000007F9	4	Cancelled	

Fig 1.3 [DB] PaymentMethods, DocumentTypes and DocumentStatuses tables

## 1.1 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.

## 1.2 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

## 1.3 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.

In case an account to-be-paid by Purchase Order is not granted access to the OTL yet, payment of the Purchase Order can be applied from the Admin site only:

Billing	Order/Inv/Quote	Pending Pmt	Notes	Usage	Login history	Abuse Details	Mgmt			
Type	Number	Created Date	Due date	Product	Created By	Status	Amount due	Amount paid	Outstanding Amount	Actions
Bill	4962210	7/14/2011 12:25:08 AM	7/14/2012 12:00:00 AM	OTL Premium Annual	Ada Miron	Open	\$375.00	\$0.00	\$375.00	<a href="#">Bill now</a>
Invoice	4962728	7/14/2011 12:30:51 AM	8/13/2011 12:00:00 AM	lyndaCampus	Ada Miron	Open	\$23,000.00	\$0.00	\$23,000.00	<a href="#">Apply payment</a>   <a href="#">Activate OTL</a>

Fig 1.4 [Admin Site] Customer Details -> Apply Payment to an Invoice

## 1.4 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.

The screenshot shows the lynda.com Admin Site interface. At the top, there's a navigation bar with links for CS, Production, Content, Marketing, Finance, CMS, Admin, and Reports. Below that is a secondary navigation bar with links for Search, New Account, New Quote, Training, and Abuse. The main content area displays a quote detail page for quote #4964205. The page includes contact information for the customer (Ada Miron) and the company (lynda.com), payment details, and a breakdown of the quote items. At the bottom, there's a note about considering lynda.com for training needs and buttons for Back, Invoice Quote, and Cancel Quote.

**lynda.com admin**

CS Production Content Marketing Finance CMS Admin Reports

Search New Account New Quote Training Abuse

lynda admin > CS > Search Results > Customer Detail > Quote Detail

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**lynda. com**

6410 Via Real Carpinteria, CA, 93013, USA Ph (US): [\(888\) 335-9632](#) Ph (Int'l): [\(805\) 477-3900](#) Fax: (805) 477-5604

**QUOTE #4964205**

Bill To:	Contact Info:	Quote Information:	Payment Information:
Ada Miron amiron99900@softvision.ro Sv R  C Romania Ph: 12345	Ada Miron amiron99900@softvision.ro Sv  Romania Ph: 12345	Quote Date: 7/14/2011 Quote Status: Open  Ada Miron amiron99900@softvision.ro Sv  Romania Ph: 12345	

**QUOTE DETAIL**

Product ID	Product Name	Qty	Unit Price	Total	Discount / Credit	Total Net
1006	lyndaKiosk	100	\$20.00	\$2,000.00	(\$0.00)	\$2,000.00
Subtotal						\$2,000.00
Discount						(\$0.00)
Sales tax						\$0.00
Shipping and handling						\$0.00
Shipping and handling discount						\$0.00
Total (US Dollars)						\$2,000.00

**Notes**

Quote Type: New  
Discount Code: -  
Start Date (mm/dd/yy): 7/14/2011  
Expiration Date (mm/dd/yy): 7/14/2012  
Duration: 1 Year

**Individual Sales and Services:** c5@lynda.com (805) 477-5604 (fax)    **Group Sales and Service:** sales@lynda.com (805) 477-5612 (fax)    **Accounting:** accounting@lynda.com (805) 477-5604 (fax)    **Remittance Address:** lynda.com, inc. Dept 8527 Los Angeles, CA 90084-8527

**Thank you for considering lynda.com for your training needs.**

[Back](#) [Invoice Quote](#) [Cancel Quote](#)

Fig 1.5 [Admin Site] Quote Details

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

A quote can be either invoice or cancelled from the Admin site, by a Customer Support representative, as presented in the screen grab above.

## 1.5 Payments

The screenshot shows the results of a SQL query in SQL Server Management Studio. The query selects all columns from three tables: PaymentTypes, PaymentMethods, and PaymentStatuses. The results are displayed in three separate result sets.

	id	created	timestamp	name	description
1	1	2009-02-07 01:47:40.313	0x0000000000000009C2	Payment	
2	2	2009-02-07 01:47:40.313	0x0000000000000009C3	Refund	

	id	created	timestamp	name	description	isInternal
1	1	2009-02-07 01:47:39.190	0x000000000000000803	Credit Card		0
2	2	2009-02-07 01:47:39.190	0x000000000000000804	Check		0
3	3	2009-02-07 01:47:39.190	0x000000000000000805	Money Order		0
4	4	2009-02-07 01:47:39.190	0x000000000000000806	Wire Transfer		0
5	5	2009-02-07 01:47:39.190	0x000000000000000807	Credit		1
6	6	2010-06-23 22:04:32.840	0x000000000F805B08	PayPal		0

	id	created	timestamp	name	description
1	1	2009-02-07 01:47:39.173	0x0000000000000007FF	Pending	
2	2	2009-02-07 01:47:39.173	0x000000000000000801	Confirmed	
3	3	2009-02-07 01:47:39.173	0x000000000000000802	Failed	

Fig 1.6 [DB] PaymentTypes, PaymentMethods and PaymentStatuses tables

## **Payment Types**

We can have the following payment types related to the customers:

- 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 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 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 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

## **1.6 Billing**

There are two ways of collecting billing data, which is kept into the lynda.com DB:

- Through the Public site, where the customers submit their personal, billing and credit card information and authorize lynda.com to charge their account
- Through the Admin site, where a Customer Support representative will enter customer data into the system, which is provided by the customer mostly by phone

Depending on their payment method, transactions are processed in different ways:

- Credit Card related transactions are processed through Authorize.Net
- PayPal related transaction are processed through the PayPal service
- All other transactions completed by any of the other available payment method are handled individually within the Finance department

For fraud protection, the system uses the SSL technologies and, in case of Credit Cards processing, the CVV2 verification. CVV2 (aka Credit Card Security Code) are collected through the registration process and used only once, on the first call to Authorize.Net when data is sent for validation. CVV2 is not saved on lynda.com system and cannot be used for further transactions. Although, there have been some attempts, the AVS (Address Verification System) system is not implemented yet.

## Authorize.Net

Depending on the type of transactions there are four types of calls to Authorize.Net:

1. Authorize only method – this is used for the cases when the customer subscribes to a free trial that is automatically followed by a paid subscription (in case the customer does not cancel during the trial period). In this case we capture billing and credit card info, send them to Authorize.Net and obtain an authorization ID (transaction ID) that will be used when the actual charge request will be sent to Authorize.Net. The method we use, together with its parameters, is presented below:

```
public static void AuthorizeCharge(CreditCard cc, string username, string persona, string ip, int documentId, decimal amount, bool avs, out string response)
```

2. Charge - Prior Authorized charge capture function – this is used in conjunction with ‘Authorize only method’ for capturing the amount that was prior authorized. The same as above, it’s only used for paid trial transactions, more specifically, for capturing the first-time cost of the subscription. The charge for the following subscription period, in case the subscription is auto-renew, will be performed with the ‘Authorize and capture method’ (see below). The method we use, together with its parameters, is presented below:

```
public static void CaptureCharge(CreditCard cc, string username, string persona, string ip, int documentId, decimal amount, bool avs, string tranID, out string response)
```

3. Void Charge method – this one is used in conjunction with the ‘Authorize only method’ in case the customer upgrades during the trial period to another subscription. For this case the system will void the previous authorized charge and will use the ‘Authorize and capture method’ for the new subscription fee. The method we use, together with its parameters, is presented below:

```
public static void VoidCharge(CreditCard cc, string username, string persona, string ip, int documentId, decimal amount, bool avs, string tranID, out string response)
```

4. Authorize and capture method – this is used in all the other cases (including all the other initial and renewal charges). While the ‘Authorize only method’ can be triggered only from the Public site, ‘Authorize and capture method’ might be triggered from either the Public site, the Admin site or the Billing Job. The method we use, together with its parameters, is presented below:

```
public static void Charge(CreditCard cc, string username, string persona, string ip, int documentId, decimal amount, bool avs, out string response)
```

## **Billing Job**

In case of auto-renew accounts paid by Credit Card, their corresponding recurring payments are handled by the Billing Job, which is part of the Nightly Job (which besides billing-related tasks, also handles other tasks, like: expiring accounts, renewing accounts, downgrades, and others).

Below is a short summary of how the Billing Job works:

### **1. Implementing recurring billings**

For every recurring bill that we need to make, the system will create a Bill document that will be processed by the Nightly Job.

A bill is automatically created after the previous document (order or future bill, depending on the case) is paid in full.

Note: The Billing Job will not process the future invoices, which can only be paid through a Customer Support representative, from the Admin site.

### **2. Communication between the Billing Job and Authorize.Net**

When the Billing Job tries to process a bill, an attempt is made to charge the customer's credit card through the Authorize.Net system. All responses from the Authorize.Net system are saved in the Payment\_CreditCards table, which indicates the payment status through the ResponseCode field ('1' for successful payments, any other value for failed payments).

### **3. What if a payment fails?**

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

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

Failed payment on the 1<sup>st</sup> 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 2<sup>nd</sup> 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 2<sup>nd</sup> 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**

Due to an increase interest in the PayPal payment option there was a solid business case for implementing this payment option on LDC. At the very beginning the intent was to be offered for all flows, but lately the scope was reduced to consumers. Also, the payment option is available only for the new consumer registration flow performed from the Public site (payment through PayPal is not available from the Admin site), and recently for consumer renewal flow. Customers cannot upgrade or downgrade using PayPal, nor can they change their billing options to or from a PayPal account.

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.

The screenshot shows a PayPal billing agreement page for a monthly subscription to Lynda.com. At the top left is the Lynda.com logo. The main content is divided into two main sections: 'Your order summary' on the left and 'Review your information' on the right.

**Your order summary:**

Descriptions	Amount
Monthly Subscription Item description: \$25 per month for ... Item number: 1001 Item price: \$25.00 Quantity: 1	\$25.00
You will be billed \$25.00 per Month.	
Item total	\$25.00
Total \$25.00 USD	

**Review your information:**

**Shipping address:**  
Ada Miron  
ro  
san jose, CA 95112  
United States  
Note to seller: [Add](#)

**Payment methods** [Change](#)  
Instant Transfer : Chase Manhattan Checking (Confirmed) \$25.00 USD x-9184  
PayPal will use Visa XXXX-XXXX-XXXX-6807 to fund this transaction if your bank does not have enough funds.

**Contact information:**  
dan072\_1266223984\_per@yahoo.com

Use PayPal for future payments to Lynda.com. Payments will be made with your [default payment method](#) unless you select a preferred payment method. To make a change, go to My Preapproved Payments on the Profile page.  
[Agree and Pay](#)

[Cancel and return to Lynda.com](#)

[Site Feedback \[-\]](#)

PayPal. The safer, easier way to pay. For more information, read our [User Agreement](#) and [Privacy Policy](#).

**Fig 1.7 [PayPal] Billing Agreement**

Even though at the very beginning we intended to use “Recurrent Profiles” option on PayPal for implementing this feature, this has been proved to be unsatisfying for our business, due to the lack of possibility to change the billing day of month. Instead, we are now using Express Checkout with Merchant Initiate Billing, and Billing Agreements. A Billing Agreement is an agreement that the buyer (*our customer*) accepts in the Express Checkout Payment flow. 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).

From the customer perspective, the flow goes like this:

- 1) Users go through subscription steps until they reach the Billing & Payment Info step. They need to specify a valid combination of City, State and Zip in order to be able to check out with PayPal.
- 2) If validation of City + State + Zip is successful, users get redirected to their PayPal account on the same web page, presented with the receipt and asked to log in.
- 3) After signing the billing agreement, the request is processed, and if payment is successful, users are returned to lynda.com, on the next step of the flow they initiated.
- 4) If the charge fails, users are redirected back to the Billing & Payment Info step (where an error message will be displayed), in order to correct their payment info, or choose another payment method.

## **2. lynda.com**

### **Products**

- **Solutions**
- **Personas**
- **Products description**
- **Persona / Persona types / Persona statuses**



## 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 -> \$25/month, no access to exercise files
- Monthly Premium subscription -> \$37.5/month, access to exercise files
- Annual subscription -> \$250/year, no access to exercise files
- Annual Premium subscription -> \$375/year, access to exercise files

### Business solutions:

- lyndaPro subscription
- lyndaKiosk subscription

### Education solutions:

- lyndaCampus subscription
- lyndaPro subscription
- lyndaKiosk subscription
- lyndaClassroom subscription

### Government solutions:

- lyndaPro subscription
- lyndaKiosk subscription

### Miscellaneous:

- Gift subscriptions
- Promotions

### Physical products\*:

- CD/DVD-ROMs
- Accessories & Apparel

\*These are available on the lynda.com Online Store only (which is not currently integrated on the Public/Admin sites), and are handled by a third-party system

Most subscriptions can be purchased from either the Public site (by the customers) or the Admin site (with the help of a Customer Support representative), with a few exceptions:

- lyndaCampus and lyndaKiosk subscriptions can be purchased from the Admin site only
- Gift Subscriptions can be purchased from the Public site only

## 2.2 Personas

On lynda.com, there are a few attributes defining the customers: Persona, Persona Type and Persona Statuses.

SQLQuery1.sql - 64... (lyndauser (175))*						
	Results					
1	1	EB8B4DC0-5357-4134-A8DC-AABCC614E392	2009-02-07 01:47:40.157	0x0000000000000096A	Consumer	
2	2	97F6D5DA-2D77-4875-AE13-3C4D8614CAC2	2009-02-07 01:47:40.157	0x0000000017DA57D6	Master Admin	
3	3	D0E90242-92A2-4A9E-9BBB-BE829A5BEBCB	2009-02-07 01:47:40.173	0x0000000000000096C	Educator	
4	4	9D234266-9744-4F0F-976B-00E3E206E364	2009-02-07 01:47:40.173	0x0000000000000096D	Student	
5	5	A7830E16-2E36-4410-B4A3-11EB97C9B3C4	2009-02-07 01:47:40.173	0x0000000017DA57D5	lyndaPro User	
6	6	F16EA143-102D-424D-B546-A65AB64908CA	2009-02-07 01:47:40.173	0x0000000000000096F	Author	
7	7	4D233151-AF8D-46D2-BCD1-90C2A3512A3F	2009-02-07 01:47:40.173	0x0000000017DA57D7	lyndaKiosk User	
8	8	2AC4A22A-DC44-4591-BE19-B72741BEEB37	2009-02-07 01:47:40.173	0x00000000000000971	Purchaser	
9	9	BE663700-0093-49C9-BE83-538D9123A9B3	2010-09-29 21:20:38.430	0x0000000012C3582C	lyndaCampus User	Associated with a master but not with an IP range
	id	created	timestamp	name	description	
1	1	2009-02-07 01:47:39.297	0x0000000000000081E	Regular		
2	2	2009-02-07 01:47:39.297	0x0000000000000081F	Complimentary		
3	4	2009-02-07 01:47:39.297	0x00000000000000821	Promo		
	id	externalId	created	timestamp	name	description
1	1	2DB89D0E-DFF0-482C-B7A4-4521E40BED72	2009-02-07 01:47:40.203	0x0000000000000097D	Active	
2	2	49FBA2BE-86ED-4D8D-A634-EF2050F907BB	2009-02-07 01:47:40.203	0x0000000000000097E	Expired	
3	3	08B2A0D5-39AC-4919-AF90-B6EAC00423A3	2009-02-07 01:47:40.203	0x0000000000000097F	Cancelled	
4	4	539A6495-C0EE-4FC5-8559-C0D64372F396	2009-02-07 01:47:40.203	0x00000000000000980	New	
5	5	BF2F6069-C8F8-4780-BBA8-636BA8114D54	2009-02-07 01:47:40.203	0x00000000000000981	Billing Problem	

Fig 2.1 [DB] dbo.Personas, dbo.PersonaTypes, dbo.PersonaStatuses

Most of the lynda.com customers are required to set up an account upon registration, specifying a user name and password based on which to be uniquely identified in the system. Exception to this rule are the lyndaKiosk Users, for which the validation is done based on their IP, and not based on the pair user name+password.

**Persona** 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** 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** 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

## 2.3 Managing Subscriptions

**Change Plan (Upgrade)** – 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

**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/changed 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).

**Select payment type**

Select Payment Type:

**Select renewal option**

Please select one of the following options:\*

**Renew your licenses on the expiration date.** Your credit card will be charged. There will be no disruption of your service, and you and your users will enjoy uninterrupted access to the Online Training Library®.

**Allow your licenses to expire on the expiration date.** For uninterrupted access to the Online Training Library®, you must renew your licenses prior to the expiration date online by calling us at (888)335-9632.

Fig 2.2 Selecting the Renewal Method during the Registration flow

For existent lyndaPro Master Admins, the renewal method can be modified from the Admin by the Customer Support representative:

The screenshot shows the lynda.com Admin Site interface. At the top, there's a navigation bar with links like 'New Quote', 'Comp Extension', 'Activate Key', and 'Hide customer details'. Below this is the 'Customer Details' section, which includes fields for Account Info (Address Type: Contact, Country: Romania, First Name: ada, Last Name: miron, UserID: 1138586, Username: adalyndaPro3, Email: amiron99900@softvision, Org Name: sv, Address: , Address1: , City: , State/Region: , Zip/Postal Code: , Phone: 12345), Last order/invoice/quote info (Persona: Master Admin, Persona Status: Active, Persona Type: Regular, Product: lyndaPro, Join Date: 7/13/2011, Expiration Date: 7/1/2012, Order #: 4942291, Quote #: , Invoice #: , PO #: ), Alerts/Customer Contact Log (with a dropdown menu for Account Settings and Dependency Account Info), and a summary box showing User Licenses Purchased: 30, Payment Received (Active): 30, Assigned to Active Groups: 0, Available: 30. A blue arrow points down to a 'Renewal Method' field set to 'Manual Renew'. At the bottom of the main page, there are buttons for 'Welcome Email', 'Password Retrieval Email', and 'Edit'.

**Change Renewal Method**

**Account Information**

Product: lyndaPro Membership  
Expiration Date: 6/30/2012  
Renewal Method: Manual Renew

Licenses will expire on the expiration date. To prevent uninterrupted access to the Online Training Library, the lyndaPro administrator must renew their licenses prior to their expiration date by using the online Renew your Licenses link or by contacting a lynda.com Training Solutions Specialist at (888) 33559632.

**Change Renewal Method**

Auto-renew  
 Manual Renew

Fig 2.3 [Admin Site] Modifying the Renewal Method for the lyndaPro MA

## 2.4 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.

**Period** – the period is always fixed (1 month), regardless of the location the subscription was purchased from (Public or Admin site).

**Documents** – After the registration is completed, the following documents will be created for the given user: an order (if payment method chosen is Credit Card or PayPal) and a future bill, or an invoice (if payment method chosen is Purchase Order).

**Renewal method** – Consumer accounts are automatically set to auto-renew. In this case, recurring payments will be processed by the Billing Job based on the future bills.

Note: Complimentary accounts will not be set to auto-renew!

**Payment methods** – the available payment methods depend on the location the subscription was purchased from:

- Public site: the payment methods available on the Public site are Credit Card and PayPal
- Admin site: the payment methods available on the Admin site are Credit Card and Purchase Order

**Change Plan (Upgrade)** – the subscription can be upgraded to any of the other individual subscriptions, but the way the price is determined will vary.

- Upgrade to Monthly Premium subscription: the cost of the new subscription will be discounted with the remaining unused part of the current subscription. The formula for determining this is:  
$$\text{discount} = \frac{\$25}{30 \text{ days}} * (\text{EndDate} - \text{CurrentDate} + 1)$$
- Upgrade to Annual or Annual Premium subscription: the cost of the new subscription will be discounted with the full cost of the current subscription (\$25)

**Change Plan (Downgrade)** – there are no downgrades available for this type of subscription.

## 2.5 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.

**Period** – the period is always fixed (1 month), regardless of the location the subscription was purchased from (Public or Admin site).

**Documents** – After the registration is completed, the following documents will be created for the given user: an order (if payment method chosen is Credit Card or PayPal) and a future bill, or an invoice (if payment method chosen is Purchase Order).

**Renewal method** – Consumer accounts are automatically set to auto-renew. In this case, recurring payments will be processed by the Billing Job based on the future bills.

Note: Complimentary accounts will not be set to auto-renew!

**Payment methods** – the available payment methods depend on the location the subscription was purchased from:

- Public site: the payment methods available on the Public site are Credit Card and PayPal
- Admin site: the payment methods available on the Admin site are Credit Card and Purchase Order

**Change Plan (Upgrade)** – the subscription can be upgraded to either the Annual or Annual Premium subscriptions. In both cases the cost of the new subscription will be discounted with the full cost of the current subscription (\$37.5).

**Change Plan (Downgrade)** – the subscription can be downgraded to Monthly subscription only.

## 2.6 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.

**Period** – the period depends on the location the subscription was purchased from:

- Public site: the period is fixed -> 1 year
- Admin site: the period can be adjusted to values less or higher than 1 year, depending on the Customer Support representative, in which case the price will be adjusted accordingly as well. Both the Start Date and the End Date can be altered, the only conditions are that the Start Date cannot be in the past, and that End Date > Start Date

**Documents** – After the registration is completed, the following documents will be created for the given user: an order (if payment method chosen is Credit Card or PayPal) and a future bill, or an invoice (if payment method chosen is Purchase Order).

**Renewal method** – Consumer accounts are automatically set to auto-renew. In this case, recurring payments will be processed by the Billing Job based on the future bills.

In case the Start Date of an account created from the Admin site was altered (the subscription period is not the standard one), the account will NOT be set to auto-renew.

Note: Complimentary accounts will not be set to auto-renew!

**Payment methods** – the available payment methods depend on the location the subscription was purchased from:

- Public site: the payment methods available on the Public site are Credit Card and PayPal
- Admin site: the payment methods available on the Admin site are Credit Card and Purchase Order

**Change Plan (Upgrade)** – the subscription can be upgraded to Annual Premium subscription only. The cost of the new subscription will be discounted with the remaining unused part of the current subscription. The formula for determining this is:

$$\text{discount} = \frac{\$250}{365 \text{ days}} * (\text{EndDate} - \text{CurrentDate} + 1)$$

**Change Plan (Downgrade)** – the subscription can be downgraded to either Monthly or Monthly Premium subscriptions.

## 2.7 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.

**Period** – the period depends on the location the subscription was purchased from:

- Public site: the period is fixed -> 1 year
- Admin site: the period can be adjusted to values less or higher than 1 year, depending on the Customer Support representative, in which case the price will be adjusted accordingly as well. Both the Start Date and the End Date can be altered, the only conditions are that the Start Date cannot be in the past, and that End Date > Start Date

**Documents** – After the registration is completed, the following documents will be created for the given user: an order (if payment method chosen is Credit Card or PayPal) and a future bill, or an invoice (if payment method chosen is Purchase Order).

**Renewal method** – Consumer accounts are automatically set to auto-renew. In this case, recurring payments will be processed by the Billing Job based on the future bills.

In case the Start Date of an account created from the Admin site was altered (the subscription period is not the standard one), the account will NOT be set to auto-renew.

Note: Complimentary accounts will not be set to auto-renew!

**Payment methods** – the available payment methods depend on the location the subscription was purchased from:

- Public site: the payment methods available on the Public site are Credit Card and PayPal
- Admin site: the payment methods available on the Admin site are Credit Card and Purchase Order

**Change Plan (Upgrade)** – there are no upgrades available for this type of subscription.

**Change Plan (Downgrade)** – the subscription can be downgraded to either Monthly, Monthly Premium or Annual subscriptions.

## 2.8 lyndaPro Subscription

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.

The product grants full access to the Online Training Library®, including the exercise files. This subscription can be purchased from both the Public site and the Admin site.

**Characteristics** – the subscription is purchased by a Master Admin, who pays for it, thus is given a complimentary (free) license and administrative rights. The Master Admin decides how many licenses to purchase, what lyndaPro Users to create and assign licenses to and into what groups to divide them. The number of licenses indicates the maximum number of users that can be active at the same time. Licenses can be assigned to or unassigned from the lyndaPro Users, granting them or removing access to their accounts. Due to this reason, the total number of users can be higher than the total number of licenses, from which a maximum number of users equal to the total number of licenses can be active at one time, the rest of them being inactive.

**Personas** – the personas corresponding to this type of subscription are the lyndaPro Master Admin and the lyndaPro Users. A lyndaPro Master Admin's account can be created from both the Admin and the Public site, by purchasing a lyndaPro membership. A lyndaPro User's account can only be created from the Public site, based on a group invitation received from a lyndaPro Master Admin.

**Period** – the period depends on the location the subscription was purchased from:

- Public site: the period is fixed -> 1 year
- Admin site: the period can be adjusted to values less or higher than 1 year, depending on the Customer Support representative, in which case the price will be adjusted accordingly as well. Both the Start Date and the End Date can be altered, the only conditions are that the Start Date cannot be in the past, and that End Date > Start Date

**Documents** – After the registration is completed, the following documents will be created for the lyndaPro Master Admin: an Order (if payment method chosen is Credit Card), or an Invoice (if payment method chosen is Purchase Order).

**Price** – the price is determined based on the number of licenses purchased, and the subscription period:

# of licenses	Price per license (per 1 year)
<b>5 – 9 licenses</b>	\$350.00
<b>10 – 19 licenses</b>	\$325.00
<b>20 – 29 licenses</b>	\$300.00
<b>30 – 59 licenses *</b>	\$262.50
<b>60 – 99 licenses *</b>	\$225.00
<b>100 – 249 licenses *</b>	\$187.50
<b>250 – 499 licenses *</b>	\$168.75
<b>500 – 749 licenses *</b>	\$150.00
<b>≥ 750 licenses * / **</b>	\$150.00

\*The ranges over 30 licenses are available only on the Admin site (on the Public site, customers are instructed to call Customer Support in case they'd want to purchase more than 30 licenses)

\*\*Ranges over 749 licenses are not specified in the lynda dbo.BillingRules table, like the other ranges, but calculated directly from the code, taking the price of the previous range (\$150, corresponding to the 500-749 licenses range).

**Renewal method** – The customer has the possibility to choose during the registration flow whether to set their account to auto-renew or not, in case payment is done by Credit Card. In case of Purchase Order payments, the account will be automatically set not to auto-renew.

In case the account is created from the Admin site, the Customer Support representative will see the two renewal options during the registration flow, but the ‘manual renewal’ option is selected by default and grayed out, not allowing to be changed. This came as a request a while after the renewal feature was implemented: because lyndaPro subscriptions usually imply significant costs on the account holder’s side, we want to make sure they read and agree with the renewal options themselves, not being able to complain afterwards that the Customer Support representative didn’t inform them about the auto-renewal policy, and that they were charged without their knowledge.

In case of auto-renew accounts, the system will not create future bills anymore, but insert new records in the lynda dbo.SubscriptionPlanChangeSummary table for each subsequent period. On the next billing date, the Billing Job checks this table, and performs the following actions: creates an order for the next period and charges it, inserts a new record in the lynda dbo.SubscriptionPlanChangeSummary table for the next period.

In case the Customer Support representative alters the standard subscription period (making it smaller or higher than 1 year), the account system will not

Note: Complimentary accounts cannot be set to auto-renew!

**Payment methods** – the payment methods available both on the Public and the Admin sites are Credit Card and Purchase Order

**Purchase more licenses** – The Master Admin is given the possibility to purchase more licenses during a subscription period. A new order will be created for this new amount of licenses having the same End Date as the current document (this is an important rule of lyndaPro accounts, that all licenses active at a given moment of time must have the same end date), and in case the account has the auto-renew flag enabled, a new record is saved into lynda.dbo.SubscriptionPlanChangeSummary table (indicating a ‘purchase more’ for the given user). On the next billing date, the Billing Job checks this table for a ‘purchase more’ option -> if any active found, it will sum up the initial amount of licenses with the licenses purchased afterwards, and it will create a new document for the next subscription period for the total amount of licenses (plus, it will insert a new record in the lynda.dbo.SubscriptionPlanChangeSummary table for the next subscription period for the total amount of licenses).

The price of the newly purchased licenses will be calculated based on the (new) range the total amount of licenses falls into and remaining time from the initial subscription.

## 2.9 lyndaClassroom Subscription

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.

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 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.

**Characteristics** – the holder of the account is the Educator, who decides on the class details and duration, the courses assigned (maximum 5 courses per class) and the students that can ‘attend’ the class. The Educator also decides on whoever pays for the class: him/herself, or the students. Regardless of who pays for the class, the Educator is given full complimentary access to the courses assigned to the given class – as far as the other courses go which are not assigned to any of the Educator’s classes, the Educator only has limited access, being able to see the free movies only (just like a non member).

In case the Educator pays for the class, he/she will have immediate full access to the courses assigned to the class, as soon as the class starts, and for the ‘life duration’ of the class. In case of student-paid classes, the Educator has full access to the courses assigned to the class only after the first student registers and pays for the class (the student will only be paying for their share, not for the whole class).

**Personas** – the personas corresponding to this type of subscription are the Educator and the Student. An Educator's account can be created from both the Admin and the Public site, by purchasing a lyndaClassroom membership. A Student's account can only be created from the Public site, based on a class invitation received from an Educator.

**Period** – the class duration is chosen by the Educator.

**Price** – the class cost is relevant to the Educator, in case he/she is the one who's paying for the class, and is determined based on its duration and the number of students invited to 'attend' the class, using the formula:

**class\_cost = #students \* class\_duration \* price\_per\_student**

The *price\_per\_student* is \$0.33 per day (which equals \$10 per month)

The student cost is relevant to the students, in case they are the ones paying for the class, and is determined based on the class duration, using the formula:

**student\_cost = class\_duration \* price\_per\_student**

**Documents** – The creation of documents is different, depending on whoever is paying for the class.

In case the Educator pays for the class:

- an Order (if payment method chosen is Credit Card), or an Invoice (if payment method chosen is Purchase Order) will be created for the Educator
- no documents will be created for the students

In case the students pay for the class:

- an Order will be created for each student after they register and pay for the class
- no document will be created for the Educator

**Renewal method** – The lyndaClassroom accounts are not auto-renew.

**Payment methods** – the available payment methods depend on the location the subscription was purchased from, and on whoever is paying for the class:

- Educator-paid classes: Credit Card and Purchase Order are available as payment methods, both from the Admin and the Public site
- Student-paid classes: Only Credit Card payment method is available

## 2.10 lyndaKiosk Subscription

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.

**Characteristics** – the subscription can only be purchased from the Admin site, with the help of a Customer Support representative. The holder of the subscription is called a lyndaKiosk Master Admin, which decides on the following account attributes:

- the number of concurrent licenses, which indicates the maximum number of users that can log in simultaneously (*actually, we promote this product as offering concurrent access for unlimited number of users; thus, the lyndaKiosk Master Admin is asked for an estimated number of users, in order for the Customer Support representative to be able to evaluate the load of this account and take certain decision based on this*)
- the IP range(s) that will be given OTL access through the given lyndaKiosk account (at least 1 IP range needs to be defined) -> the IPs must be unique in the system, not being allowed to have several lyndaKiosk (or lyndaCampus, for that matters) Master Admins sharing the same IP(s)

Unlike the lyndaKiosk Master Admin, which has customized credentials (chosen and known by him/her), the lyndaKiosk Users are not asked to create a profile/account prior to login. Instead, the system automatically generates a user for each IP range with the following attributes: user name & password, with Persona = lyndaKiosk User (this type of users cannot be found anywhere on the Admin site, they are only visible in the DB) -> these credentials though are never transmitted to the lyndaKiosk Users, they are just for internal user management.

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 full access to the 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.

Due to the limited OTL access, the My Training menu will not be visible to the lyndaKiosk Master Admins -> they cannot earn a Certificate of Completion (because of the limited access), they are not given access to Bookmarks (this is by design), hence are not left with much from the My Training options, for which reason it was decided to be hidden for them. They will see though the My Account and Administration menus.

The lyndaKiosk Users instead have none of the account-specific menus visible (My Training, My Account). Since they cannot set their site preferences, they will inherit the preferences of their Master Admin.

For this type of subscription, the login action can be performed from several locations:

- Directly from the site (lyndaKiosk Master Admin only): the lyndaKiosk Master Admin is the only one with customized credentials (user name and password chosen and known by him/her), thus he/she can log in directly from the site – in this case, no IP validation is performed

- Through IP login (lyndaKiosk Users only): users access iplogin.lynda.com >> their IP is validated to be in the ranges specified by the lyndaKiosk Master Admin, together with some other specific validations (lyndaKiosk Master Admin is active, not all concurrent licenses are occupied) >> if all validations are successful, users are logged in and redirected to the Member.aspx page
- Through the school portal (lyndaKiosk Users only): users attempt to log in through their school portal >> no IP validation is performed in this case, but the other validations presented above still stand >> if all validations are successful, users are logged in and redirected to the Member.aspx page (or another landing page specified by the school / lyndaKiosk Master Admin)

**Personas** – the personas corresponding to this type of subscription are the lyndaKiosk Master Admin and the lyndaKiosk Users. A lyndaKiosk Master Admin's account can be created from the Admin site only, by purchasing a lyndaKiosk membership. As for the lyndaKiosk Users, they are the only users in the system that are not asked to set up an account/profile prior to login.

**Period** – the subscription period is specified by the lyndaKiosk Master Admin (the default duration is 1 year).

**Price** – This is the only subscription which doesn't have a fixed price. During the registration flow, the Customer Support representatives decides the amount to be paid by the lyndaKiosk Master Admin, based on the subscription duration and the number of concurrent licenses (and other subjective criteria).

**Documents** – After the registration is completed, the following documents will be created for the lyndaKiosk Master Admin: an Order (if payment method chosen is Credit Card), or an Invoice (if payment method chosen is Purchase Order) -> no future documents are created. There will be no documents created for the lyndaKiosk Users.

**Renewal method** – The lyndaKiosk accounts are not auto-renew.

**Payment methods** – the standard payment methods available in Admin can be used: Credit Card or Purchase Order.

## 2.11 lyndaCampus Subscription

This is another corporate product (from the Education Solutions package) 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).

**Characteristics** – the subscription can only be purchased from the Admin site, with the help of a Customer Support representative. The holder of the subscription is called a lyndaCampus Master Admin, which decides on the following account attributes:

- the number of FTEs (Full Time Employees), which represents the average number of students/employees of an institution -> based on this value it's calculated the price of the subscription, as well as the maximum number of concurrent users that are able to access the site simultaneously
- the IP range(s) that will be given OTL access through the given lyndaKiosk account (at least 1 IP range needs to be defined) -> the IPs must be unique in the system, not being allowed to have several lyndaKiosk (or lyndaCampus, for that matters) Master Admins sharing the same IP(s)

This subscription ensures full OTL access for the lyndaCampus Users, and only limited access (free movies only) for the lyndaCampus Master Admin. 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.

Due to the limited OTL access, the My Training menu will not be visible to the lyndaCampus Master Admins -> they cannot earn a Certificate of Completion (because of the limited access), they are not given access to Bookmarks (this is by design), hence are not left with much from the My Training options, for which reason it was decided to be hidden for them. They will see though the My Account and Administration menus.

The lyndaCampus Users instead will see the My Training and My Account menus, due to their full OTL access and their profile. The content of the My Account >> My Profile page might differ, depending on the type of lyndaCampus User (*see the next paragraph for more details*): the “Log In Information” section (listing the user name and password) is only available to non-authenticated users, who can view/edit it; this section should not be visible to authenticate lyndaCampus Users.

Depending on the location they log in (*see the next paragraph for more details*), we can have 2 types of lyndaCampus Users:

- **Authenticated users:** these are the users that log in through their school portal. Since they are already logged into the portal, we usually have access to enough personal data (depending on the portal type used) in order to generate their lyndaCampus profile -> in case we cannot get their Full/Last Name, we populate these fields with the greeting set by the lyndaCampus Master Admin. These users are not required to set up a user name and a password, the system will auto-generate these attributes for them, but they will not be transmitted to the users. Since they are not aware of their credentials, this type of users will not be able to log in directly from the site.
- **Non-authenticated users:** these are the users that log in through IP login. Since we have no way of authenticating them, they are required to manually set up their profile, including a user name and a password. Due to this reason, they will also be able to log in directly from the site.

The screenshot shows a web browser window with the URL <https://10.1.161.83/lyndaCampus/LoginOrCreateProfile.aspx>. The page has a yellow header bar with the text "Get smarter with lynda.com" and the lynda.com logo. Below the header, it says "Welcome, Ada Test". It provides instructions for logging in or creating a profile, mentioning movie viewing history and other features. There are "learn more" and "sign in" buttons. The left side has a "Log in to your personal profile" section with fields for User Name and Password, and links for Forgot password? and log in. The right side has a "Create a personal profile" section with fields for First Name, Last Name, Email, Choose User Name, Choose Password, and Password (confirm). A note indicates that the first four fields are required. There are checkboxes for signing up for newsletters, new releases announcements, and special offers. A "System Requirements" link and a "sign in" button are at the bottom.

Fig 2.4 [Public Site] Log In or Create Profile page

For this type of subscription, the login action can be performed from several locations:

- Directly from the site (lyndaCampus Master Admin, non-authenticated lyndaCampus Users): for the lyndaCampus Master Admin, no IP validation will be performed in this case. From the lyndaCampus Users, only the non-authenticated ones are able to log in directly from the site, since they have customized credentials (user name and password chosen and known by them), unlike the authenticated lyndaCampus Users -> in their case though, additional IP validation will be performed, besides the credentials validation.
- Through IP login (non-authenticated lyndaCampus Users only): users access iplogin.lynda.com >> their IP is validated to be in the ranges specified by the lyndaCampus Master Admin, together with some other specific validations (lyndaCampus Master Admin is active, not all concurrent licenses are occupied) >> if all validations are successful, users are asked to either log in using their existing profile or create a profile in case they don't have one
- Through school portal (authenticated lyndaCampus Users only): users attempt to log in through their school portal >> no IP validation is performed in this case, but the other validations presented above still stand >> if all validations are successful, users are logged in and redirected to the Member.aspx page (or another landing page specified by the school / lyndaCampus Master Admin) in case they have confirmed their profile; otherwise, they are brought to the Confirm Your Profile page prior to login

Note: the schools use different portal types, like Shibboleth, CAS or OCAD. Depending on the portal type, we may or may not be able to create profiles with full user information (ex: for users coming through non-Shibboleth portals, we cannot retrieve their First/Last Name, and we are forced to use the greeting set by the Master Admin instead in order to populate these fields), or the portal-specific validations in case of login through school portal might differ.

**Personas** – the personas corresponding to this type of subscription are the lyndaCampus Master Admin and the lyndaCampus Users. A lyndaCampus Master Admin's account can be created from the Admin site only, by purchasing a lyndaCampus membership. A lyndaCampus User's account can only be created from the Public site, by the user, or automatically by the system, depending on the location the user accesses the site from (site, IP login, school portal) and the type of user (authenticated or non-authenticated).

**Period** – the subscription period is specified by the lyndaCampus Master Admin (the default duration is 1 year).

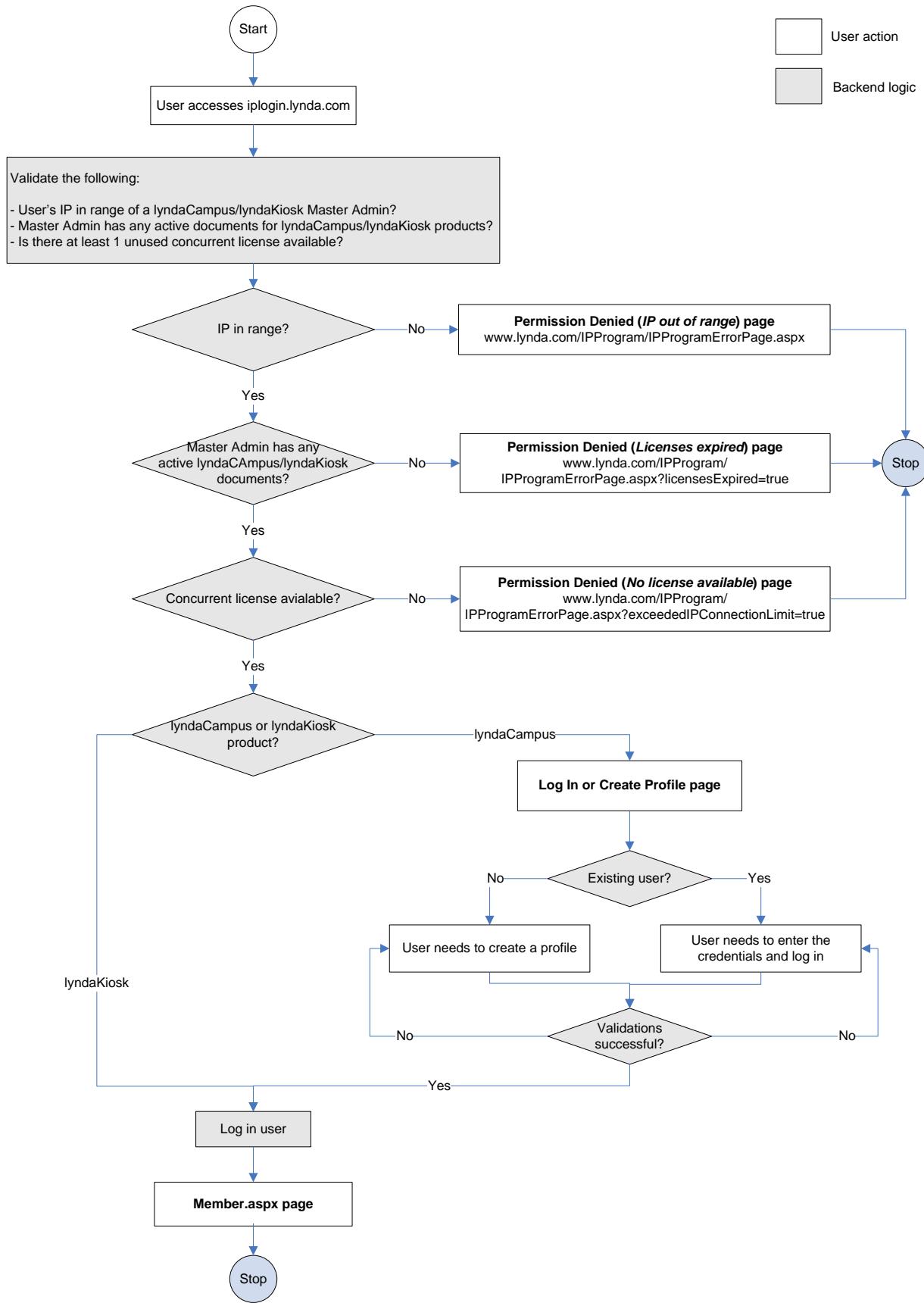


Fig 2.5 IP Login for lyndaCampus and lyndaKiosk Users

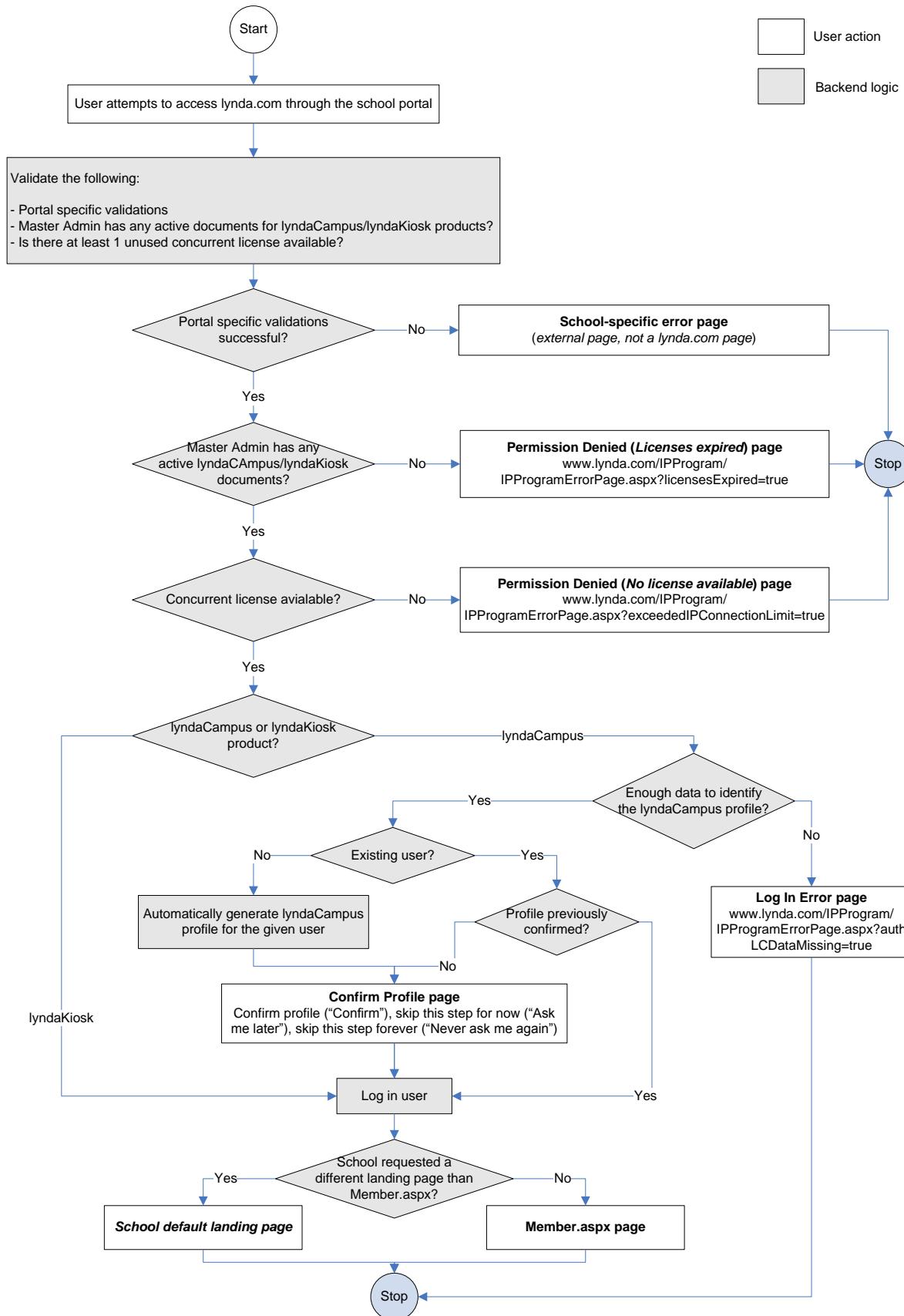


Fig 2.6 Login through school portal for lyndaCampus and lyndaKiosk Users

<http://www.lynda.com/IPProgram/IPProgramErrorPage.aspx>

lyndaKiosk - Login Error

Become a member | products ▾ | support ▾

subscribe | reactivate | log in

lynda.com® subject▼ software▼ author▼ new▼

What would you like to learn? search

lynda.com » lyndaKiosk Login Error

### Permission Denied

We are sorry. The IP address where you are coming from does not have access to lynda.com's Online Training Library®. Please make sure you are accessing it from the right network.  
If you still have problems accessing our Online Training Library® please contact your administrator or lynda.com's customer support or call lynda.com's technical support at  1-888-335-9632 .



<http://www.lynda.com/IPProgram/IPProgramErrorPage.aspx?licensesExpired=true>

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### Permission Denied

Your organization's licenses have expired.

Please contact your administrator if you have any questions, or call lynda.com at  1-888-335-9632x2  or email at sales@lynda.com.

Thank you for your interest in lynda.com!



<http://www.lynda.com/IPProgram/IPProgramErrorPage.aspx?exceededIPConnectionLimit=true>

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### Permission Denied

Your organization's licenses are currently all in use. Please try back again later.

If you find you are unable to access the site on an on-going basis, please contact your administrator about the purchase of additional licenses.

If you have questions or need additional assistance please contact lynda.com at  1-888-335-9632x2  or sales@lynda.com.

Thank you for your interest in lynda.com!



-  Learn about lynda.com
-  Take a guided tour

<http://www.lynda.com/IPProgram/IPProgramErrorPage.aspx?authLCDDataMissing=true>

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What would you like to learn? search

lynda.com » lyndaKiosk Login Error

### Log in Error

The information needed to create or locate your account is not available or could not be read. Please contact your account administrator to assure that your information is complete and correct.



Fig 2.7 lyndaCampus / lyndaKiosk Log In Errors

**Price** – the price is determined based on the number of FTEs specified and the subscription period:

# of FTEs	Price per FTE/set of FTEs (per 1 year)
<b>1 – 999 FTEs</b>	\$12,500.00 *
<b>1,000 – 4,999 FTEs</b>	\$23,000.00 *
<b>5,000 – 14,999 FTEs</b>	\$4.75
<b>15,000 – 29,999 FTEs</b>	\$3.50
<b>30,000 – 49,999 FTEs</b>	\$3.00
<b>50,000 – 99,999 FTEs</b>	\$2.50
<b>100,000 – 250,000 FTEs</b>	\$2.00

\*The price corresponding to the first 2 ranges is fixed, considered per set of FTEs, regardless of the number of FTEs purchased within these ranges (ex: the price for 100 FTEs will be the same as the price for 900 FTEs, equaling \$12,500.00). The price corresponding to the next ranges is calculated based on the number of FTEs specified.

```

SQLQuery1.sql - Id... (lyndauser (108))*
    select * from dboConcurrencyRules
    select * from dbo.BillingRuleTypes
    select * from dbo.BillingRules where productId=1010
  
```

ConcurrencyRules				
id	productId	minQuantity	maxQuantity	concurrentUsers
1	1010	1	999	100
2	1010	1000	4999	100
3	1010	5000	14999	100
4	1010	15000	29999	200
5	1010	30000	49999	200
6	1010	50000	99999	200
7	1010	100000	250000	200

BillingRuleTypes		
id	name	description
1	SetPrice	The price is per set of users.
2	UserPrice	The price is per user.

BillingRules														
id	externalId	created	timestamp	productId	frequencyId	interval	amount	startDate	endDate	minQuantity	maxQuantity	autoRenewal	isActive	billingRuleTypeId
1	A775A66...	2010-09-29...	0x000000...	1010	3	1	12500.00000000	2010-01-01 00:00:00.000	2010-12-31 00:00:00.000	1	999	0	1	1
2	5E325E4...	2010-09-29...	0x000000...	1010	3	1	23000.00000000	2010-01-01 00:00:00.000	2010-12-31 00:00:00.000	1000	4999	0	1	1
3	0A219A1...	2010-09-29...	0x000000...	1010	3	1	4.75000000	2010-01-01 00:00:00.000	2010-12-31 00:00:00.000	5000	14999	0	1	2
4	8A185E0...	2010-09-29...	0x000000...	1010	3	1	3.50000000	2010-01-01 00:00:00.000	2010-12-31 00:00:00.000	15000	29999	0	1	2
5	5F6161A...	2010-09-29...	0x000000...	1010	3	1	3.00000000	2010-01-01 00:00:00.000	2010-12-31 00:00:00.000	30000	49999	0	1	2
6	489621F...	2010-09-29...	0x000000...	1010	3	1	2.50000000	2010-01-01 00:00:00.000	2010-12-31 00:00:00.000	50000	99999	0	1	2
7	7C4668A...	2010-09-29...	0x000000...	1010	3	1	2.00000000	2010-01-01 00:00:00.000	2010-12-31 00:00:00.000	100000	250000	0	1	2

Fig 2.8 [DB] dbo.ConcurrencyRules, dbo.BillingRulesTypes, dbo.BillingRules

**Documents** – After the registration is completed, the following documents will be created for the lyndaCampus Master Admin: an Order (if payment method chosen is Credit Card), or an Invoice (if payment method chosen is Purchase Order) -> no future documents are created. There will be no documents created for the lyndaCampus Users.

**Renewal method** – The lyndaCampus accounts are not auto-renew.

**Payment methods** – the standard payment methods available in Admin can be used: Credit Card or Purchase Order.

# 3. Consumer Flows



- **Public site flows**
- **Admin site flows**

# 3.1 [Consumer] Registration – Public Site

This flow is followed by new customers who want to purchase an Individual Subscription (Monthly, Monthly Premium, Annual, Annual Premium) from the Public site.

The figure consists of three screenshots of the lynda.com consumer registration process, labeled Step 1, Step 2, and Step 3.

**Step 1: Account Information**

Online Training Library® sign up: secure checkout

Have questions? Call or toll free in the US 1 (888) 335-9632 International: 1 (803) 477-3900

1 2 3

Account information Billing Information Begin learning!

**Online Training Library® membership plan (compare plans)**

	Price (USD)
Monthly	\$25.00/month
Monthly premium (includes exercise files)	\$37.50/month
Annual	\$250.00/year <small>savo \$30</small>
Annual premium (includes exercise files)	\$375.00/year <small>savo \$75</small>

Need a plan for five or more users?

**Account Information**

first name: \_\_\_\_\_ Are you a past or expired member?  reactivate account

last name: \_\_\_\_\_

email: \_\_\_\_\_

choose user name: \_\_\_\_\_

choose password: \_\_\_\_\_ at least six characters with letters and numbers

password (confirm): \_\_\_\_\_

I would like to receive:  lynda.com Monthly Newsletters  New Releases Announcements  Special Announcements and Offers

**continue**

\* indicates a required field

**Step 2: Billing Information**

lynda.com > step 2: sign up Online Training Library® sign up: secure checkout

1 2 3

Account Information Billing Information Begin learning!

**Online Training Library® membership plan**

Price (USD)
Monthly change \$25.00/month

Have a promotional code? Click here.

Total: \$25.00

**Billing Information**

first name: Ada last name: Miron company/org. name: \_\_\_\_\_ address: \_\_\_\_\_ apt/suite: \_\_\_\_\_ city: \_\_\_\_\_ state: Select one... zip: \_\_\_\_\_ country: United States phone: \_\_\_\_\_ billing email: amren789@softvision.ro

Your personal information is safe and will never be shared with any third party. See our Privacy Policy for more details.

How did you hear about us? Select one...

\* indicates a required field

**Step 3: Complete**

lynda.com > step 3: sign up Online Training Library® sign up: complete

1 2 3

Account Information Billing Information Begin learning!

**Online Training Library® membership plan**

Price (USD)
Monthly \$25.00

Order Date: 07/18/2011 06:01:50 AM Order Number: 4977761 Payment Method: Visa -1111

Next Bill Date: 08/18/2011 Next Bill Amount: \$25.00

Thank you for subscribing to the lynda.com Online Training Library®. Your receipt has been emailed to you.

lynda.com® 6410 Via Real, Carpinteria, CA 93013 Phone (US): 1 (888) 335-9632 Phone (Int'l): 1 (803) 477-3900

Welcome Ada,

Start your learning right away! You can start by watching our introductory tour video, See how lynda.com works, on the left. When you are ready to start learning, visit our latest releases page or our all courses page, and select a course from there, or navigate to the course of your choice from the drop-down menus on the top of these pages.

**See how lynda. works**

**view latest releases** **view all courses**

**Tutorials on** 3d + animation audio business design developer home computing photography video web + interactive

**Keep up to date:** [lynda.com blog](#) [become a fan on Facebook](#) [follow us on Twitter](#)

**Payment Information**

payment type: credit card amount: \$25.00 (billed now and every month from today's signup date)

credit card type: Visa credit card number: \_\_\_\_\_ name on card: \_\_\_\_\_ credit card security code: \_\_\_\_\_ more info expiration date: 07-July 2011

**Billing conditions**

You are agreeing to be charged for a subscription service for a monthly membership. You will be charged \$25.00 now, and will be automatically charged monthly for the regular fee of \$25.00, starting next 08/18/2011, until you cancel the subscription. You can cancel your membership at any time from the lynda.com web site when you log in to the service. If you cancel within a billing cycle, you will not be billed for the following period.

I have read and agree to the Terms and Conditions.

**submit**

\* indicates a required field

Fig 3.1 [Public Site] Consumer Registration

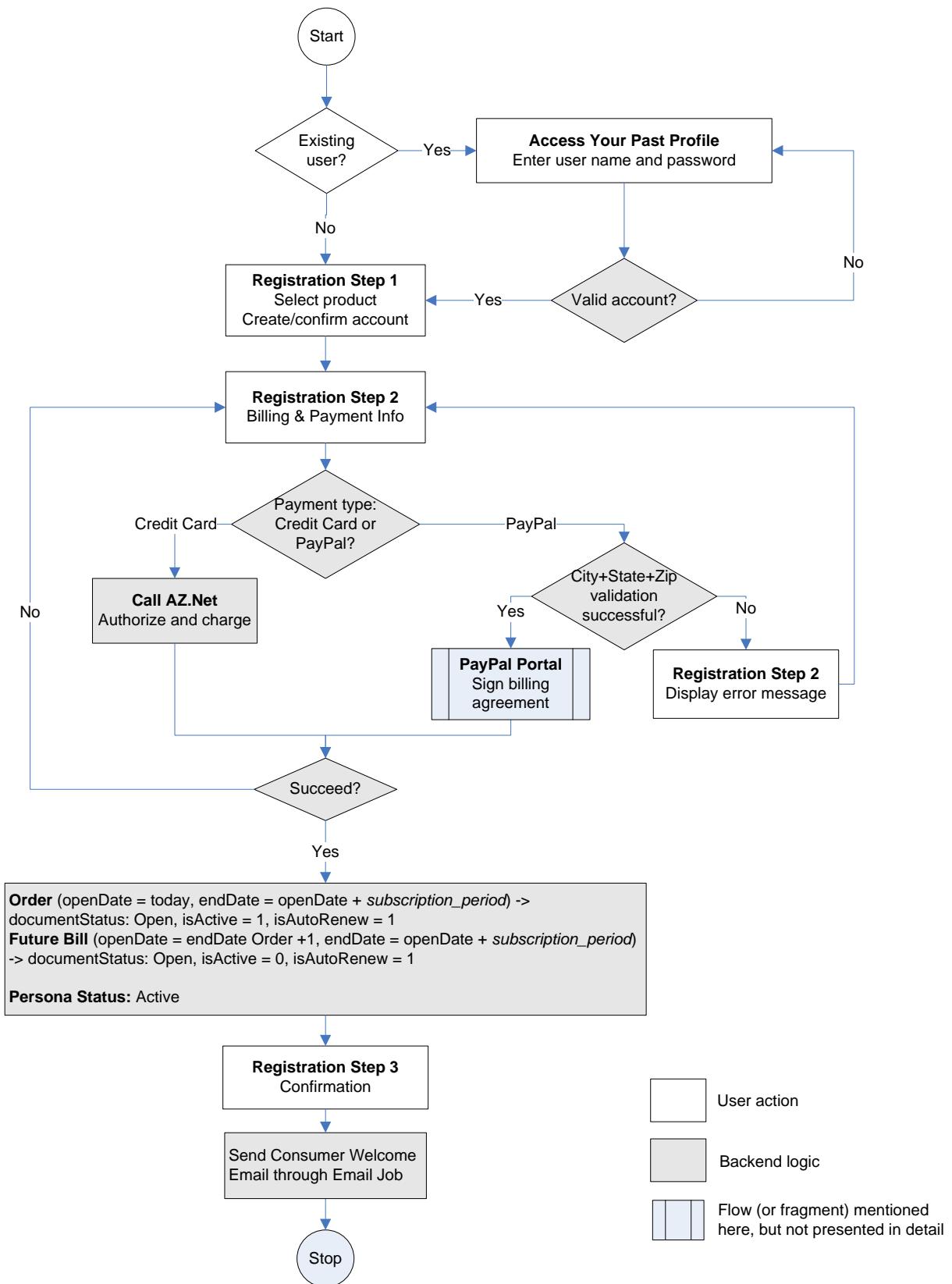


Fig 3.2 Consumer Registration from Public Site

## 3.2 [Consumer] Registration – Admin Site

This flow is followed by Customer Support representatives who purchase an Individual Subscription (Monthly, Monthly Premium, Annual, Annual Premium) from the Admin site at a customer's request.

**New Account**

Select the person / product  
 lyndahiro admin  
 Educator  
 Consumer  
 lyndakiosk admin  
 lyndacampus admin

Select the account type  
 Regular  
 Complimentary

[Continue](#)

**Consumer Registration Confirmation**

You have successfully created a OTL Standard Monthly account for Ada Miron. The credit card was successfully charged with \$25.00

[Continue](#)

**Consumer Registration Step 2**

**Subscription Signup: Step 2**

**Subscription Type**

\$25 per month for access to all courses.  
 \$37.50 per month for access to all courses, plus exercise files.  
 \$250 per year for access to all courses. **Save \$50 off the Monthly price!**  
 \$375 per year for access to all courses, plus exercise files.

NOTE: All subscriptions are automatically billed on a monthly or annual basis, depending on whether you have a monthly or yearly account. You may cancel at any time. However, if your month or year has begun, that amount cannot be refunded.

**Access Granted**

Start Date (mm/dd/yyyy): 07/19/2011  
End Date (mm/dd/yyyy): 08/19/2011

[Calculate](#)  
Subscription cost = \$25.00

**Select Payment Type**

Select Payment Type: Credit Card

**Billing Information**

Country: Romania  
First Name: Ada  
Last Name: Miron  
Company/Org. Name: None  
Address: RO  
Apt/Suite: None  
City: Cluj-Napoca  
State/Province: None  
Zip/Postal Code: 1234566  
Phone: 1234566

\*Note: To help protect your credit card, lynda.com has initiated AVS (Address Verification System). Your billing address must match the credit card billing address. If you have trouble, please call us toll-free at 888-335-9612 to complete your order by phone. We will be happy to assist you.

**Credit Card Information**

Card Type: Visa  
Credit Card Number: 4111111111111111  
Name on Card: ada  
Credit Card Security Code: 123  
Expiration Date: 07/July/2011

[submit order](#)

Fig 3.3 [Admin Site] Consumer Registration

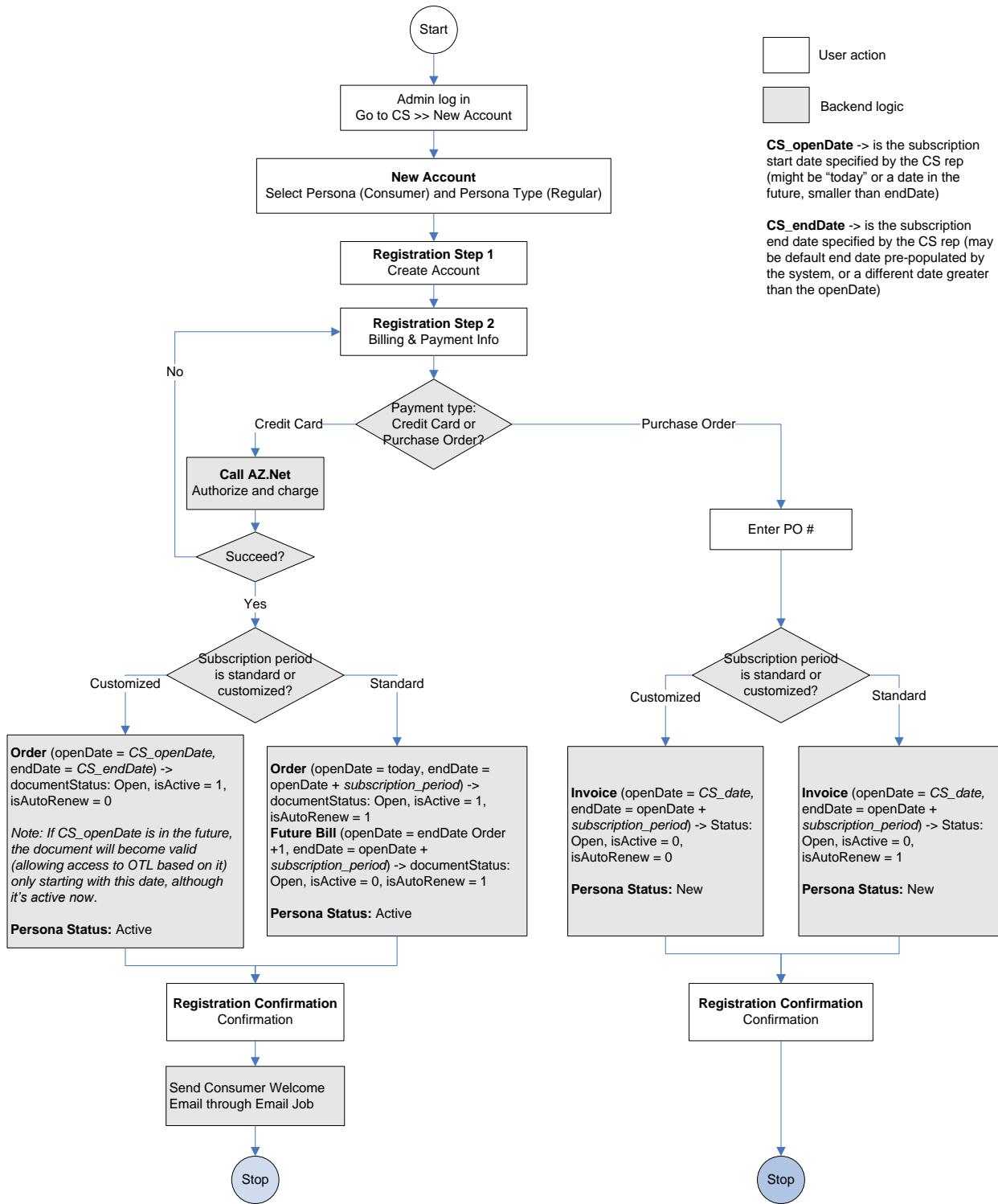


Fig 3.4 Consumer Registration from Admin Site

### 3.3 [Consumer] Complimentary Account – Admin Site

This flow is followed by Customer Support representatives who create a complimentary (free) account for a new Consumer. This type of accounts can be created from the Admin site only. The flow is similar to the one corresponding for regular accounts, with the difference that the amount paid by the customer (and implicitly written on the document) is \$0. Also, this type of accounts cannot be set to auto-renew.

**New Account**

Select the persona / product

- lyndaPro admin
- Educator
- Consumer
- lyndakiosk admin
- lyndacampus admin

Select the account type

- Regular
- Complimentary

Reason for creating a complimentary account

Please select from one of the reasons below.  
Executive Request  
If you select "Other", please enter a note below why you're creating a complimentary account today.

**Continue**

**Consumer Registration Step 1**

**lynda.com admin**

Subscription Signup: 1 of 2 - Create your account

Create an account to get unlimited access to the lynda.com Online Training Library®, including:

- Over 1,069 online courses with more courses added every week
- In-depth, up-to-date training in software from Adobe, Microsoft, Apple, Google, and more
- Over 63,423 video tutorials taught by experts in their fields

**Account Information**

Create an account to get unlimited access to the lynda.com Online Training Library®. [System Requirements](#)

Instantly access 1,065 online courses and 63,423 video tutorials.

First Name:  \*  
Last Name:  \*  
Email:  \*  
Choose Username:  \*  
Choose Password:  \* (at least 6 characters with letters and numbers)  
Password (confirm):  \*

Note: Your email address will be added to our email list. You may opt out at any time. Your personal information is safe, and will never be shared with any third-party.

**Access granted**

Start Date (mm/dd/yyyy):

End Date (mm/dd/yyyy):

Select your subscription type on the next screen. [continue >](#)

**Monthly** - \$25/month No long term commitment.  
**Monthly Premium** - \$37.50/month Includes exercise files.  
**Annual** - \$250/year Save \$50 off the Monthly price.  
**Premium** - \$375/year Includes exercise files. Save \$75 off the Monthly Premium price!

**Multi-User**  
Options for businesses and schools.

**Consumer Registration Confirmation**

You have successfully created a Complimentary OTL Standard Monthly account for Ada Miron. This account will have free access to the content of the site in the period 8/30/2011-9/10/2011.

[continue >](#)

**Consumer Registration Step 2**

**lynda.com admin**

Subscription Signup: 2 of 2 - Enter billing information

**Billing Information**

Country: Other  
First Name: Ada  
Last Name: Miron  
Company/Org. Name: Complimentary  
Address: Complimentary  
Apt/Suite: Complimentary  
City: Complimentary  
State/Province: Complimentary  
Zip/Postal Code: 99999  
Phone: 9999999999

Note: To help protect your credit card, lynda.com has initiated AVS (Address Verification System). Your billing address must match the credit card billing address. If you have trouble, please call us toll-free at [888-335-9632](tel:888-335-9632) to complete your order by phone. We will be happy to assist you.

\* Required information

**Credit Card Information**

Promo Code:  click to enter  
Credit Card Type: Visa  
Credit Card Number: 4111111111111111 \* no dashes and no spaces  
Name on Card: Ada Miron Complimentary  
Credit Card Security Code:  \* [more info](#)  
Expiration Date: 08 - August / 2011

**Welcome Email**

Send welcome email?

Yes  No

Select Email Template:  Select one...  
Add greeting message: (optional)

Desired Delivery Date: 08/29/2011

**Emails Subscriptions**

Please use the buttons below to subscribe to lynda.com newsletters:

**Newsletter Subscriptions** [Unsubscribe from all](#)

Monthly lynda.com Newsletter  
 New Release Notifications

[submit order](#)

Fig 3.5 [Admin Site] Consumer Complimentary Account

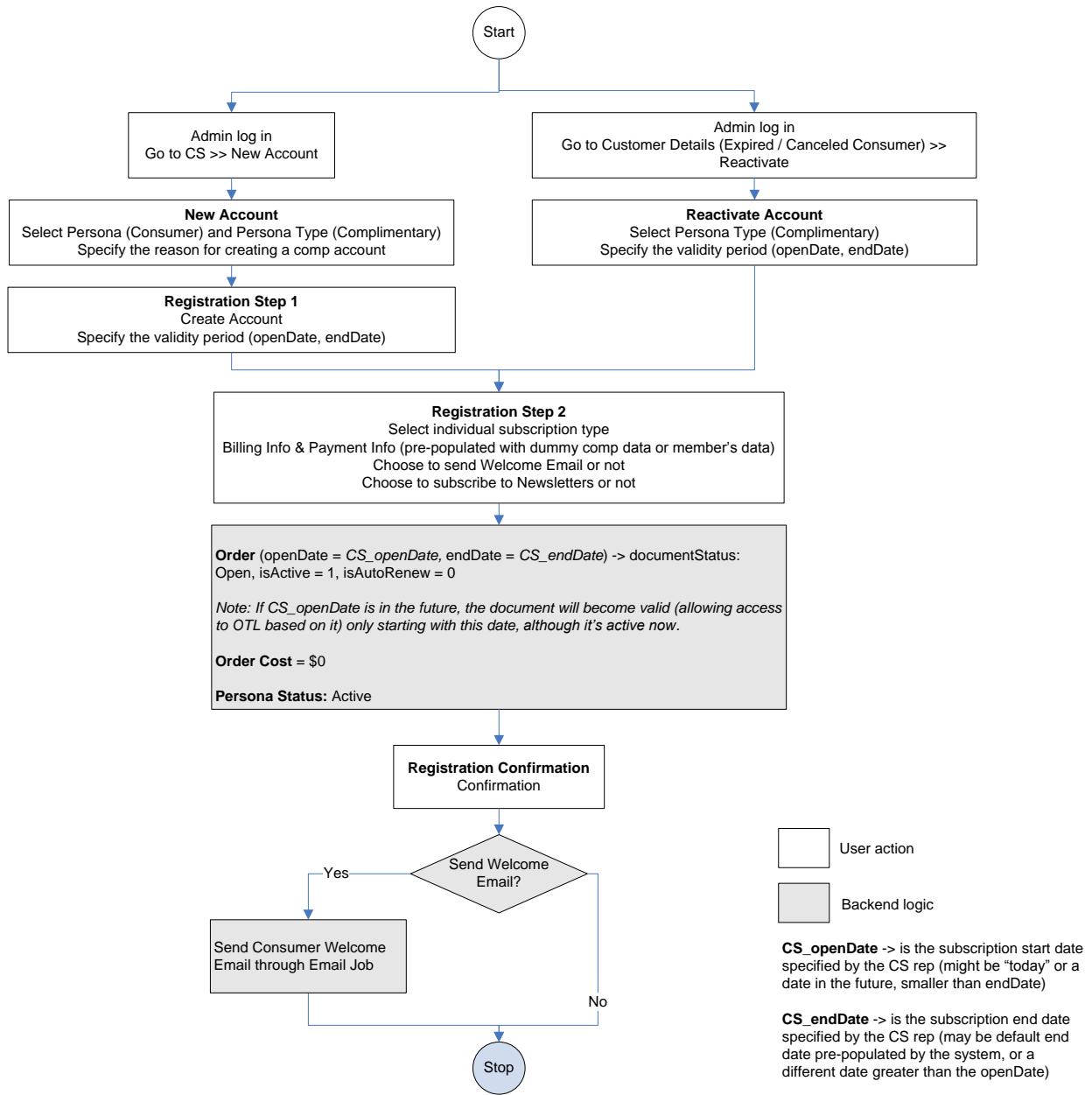


Fig 3.6 Consumer Complimentary Account from Admin Site

## 3.4 [Consumer] Comp Extension – Admin Site

This flow is followed by Customer Support representatives who decide to grant a given Consumer a free extension of the current subscription period.

**Customer Details**

lynda.com admin

Customer Details Upgrade to lyndaPro New Quote Comp Extension Activate Key Hide customer details

Account Info		Last order/invoice/quote info	Alerts/Customer Contact Log
Address Type: Contact Country: Romania First Name: Ada Last Name: Miron UserID: 1140184 Username: amiron887 Email: amiron887@softvision.ro Org Name: RO Address: Address1 City: Cluj-Napoca State/Region: Zip/Postal Code: Phone: 1234556	Persona: Consumer Persona Status: Active Persona Type: Regular Product: OTL Standard Annual Join Date: 7/28/2011 Expiration Date: 7/28/2012 Order #: 5012599 Quote #: PO # Invoice #: PO #	Billing Invoice Quote Expire Abuse Flag: None User Watch Type: None Abuse warning count: 0 Access move count: 0 Access exercises count: 0	

Welcome Email | Password Retrieval Email | Edit | Edit | Customer contacted via Email | Phone | Other | Billing | Order/Inv/Quote | Pending Pmt | Notes | Usage | Login history | Abuse Details | Mgmt | Call reason: Add Note |

**Complimentary Extension Subscription**

lynda.com admin

Comp Extension

Please select the subscription to which to issue the credit:

Consumer OTL Standard Monthly  
 Master Admin lyndaPro

**Complimentary Extension Amount**

lynda.com admin

Complimentary Extension

Set the new End Date: 01/01/2013

**Complimentary Extension Success**

lynda.com admin

Comp Extension

158 days Comp Extension has been successfully issued to this customer. The expiration date has been changed from 7/28/2012 to 1/2/2013

Fig 3.7 [Admin Site] Consumer Comp Extension

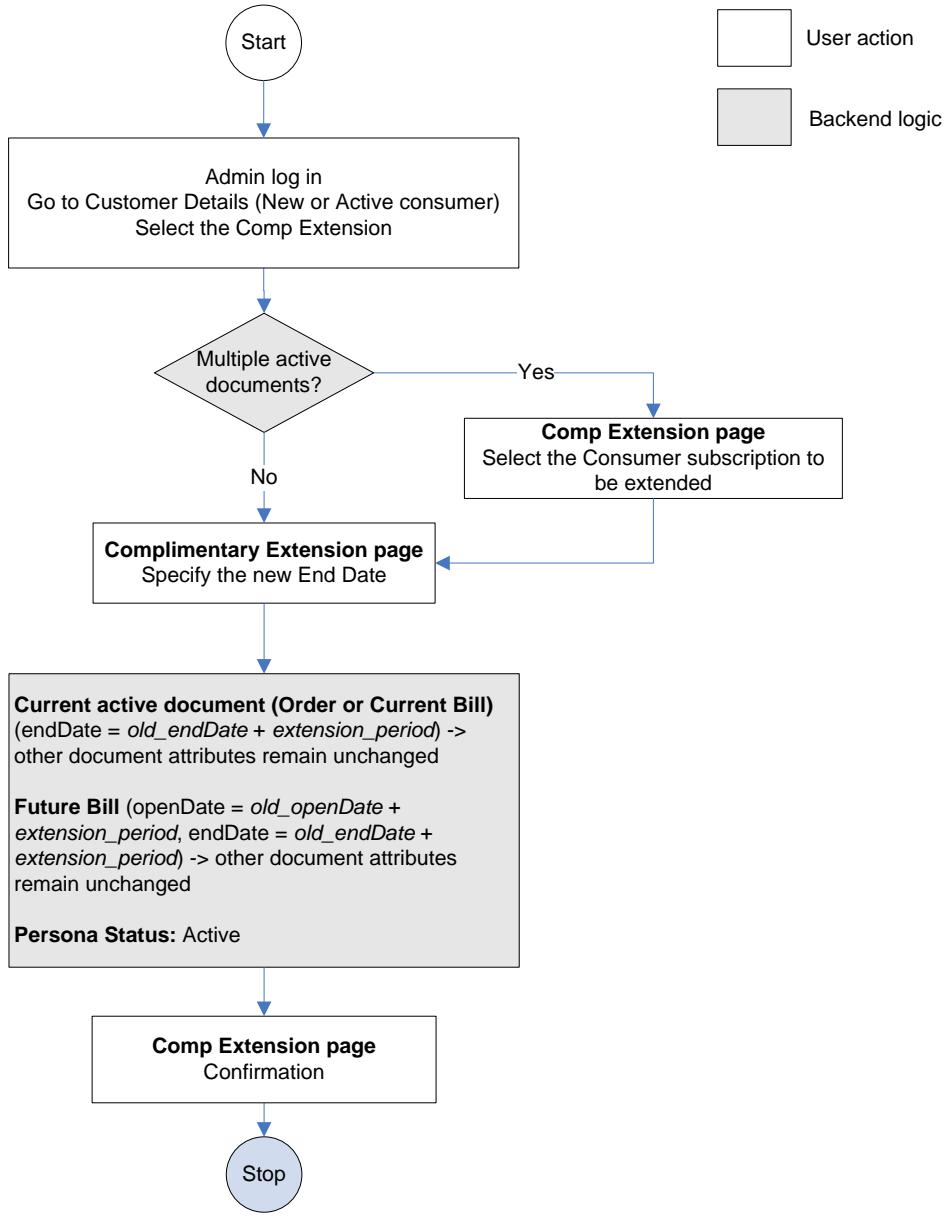


Fig 3.8 Consumer Comp Extension from Admin Site

## 3.5 [Consumer] Grant OTL Access (Activate Invoice) – Admin Site

This flow is followed by Customer Support representatives who decide to grant OTL access to Consumers having an active (unpaid, or partially paid) Invoice (indicating that the selected payment method was Purchase Order). This means that these customers will be able to access their account prior to payment.

The screenshot shows the lynda.com admin interface. The top navigation bar includes links for CS, Production, Content, Marketing, Finance, CMS, Admin, and Reports. Below the navigation is a search bar with options for New Account, New Quote, Training, and Abuse. The current path is lynda admin > CS > Search Results > Customer Detail. The main page displays 'Customer Details' with sections for Account Info, Last order/invoice/quote info, and Alerts/Customer Contact Log. A modal dialog box is centered over the page, asking 'The page at http://64.129.255.241 says: You are about to activate this invoice and grant OTL access to the user. Do you want to continue?'. The dialog has 'OK' and 'Cancel' buttons. A red arrow points from the 'OK' button to the 'Billing' section of the main page, which includes fields for Persona, Persona Status, Persona Type, Product, and Join Date. The 'Last order/invoice/quote info' section shows an OTL Premium Annual product and a join date of 8/26/2010. The 'Alerts/Customer Contact Log' section shows various status indicators like Billing, Invoice, Quote, Expire, Abuse Flag, User Watch Type, and Abuse warning count.

Fig 3.9 [Admin Site] Grant OTL Access (Activate Invoice)

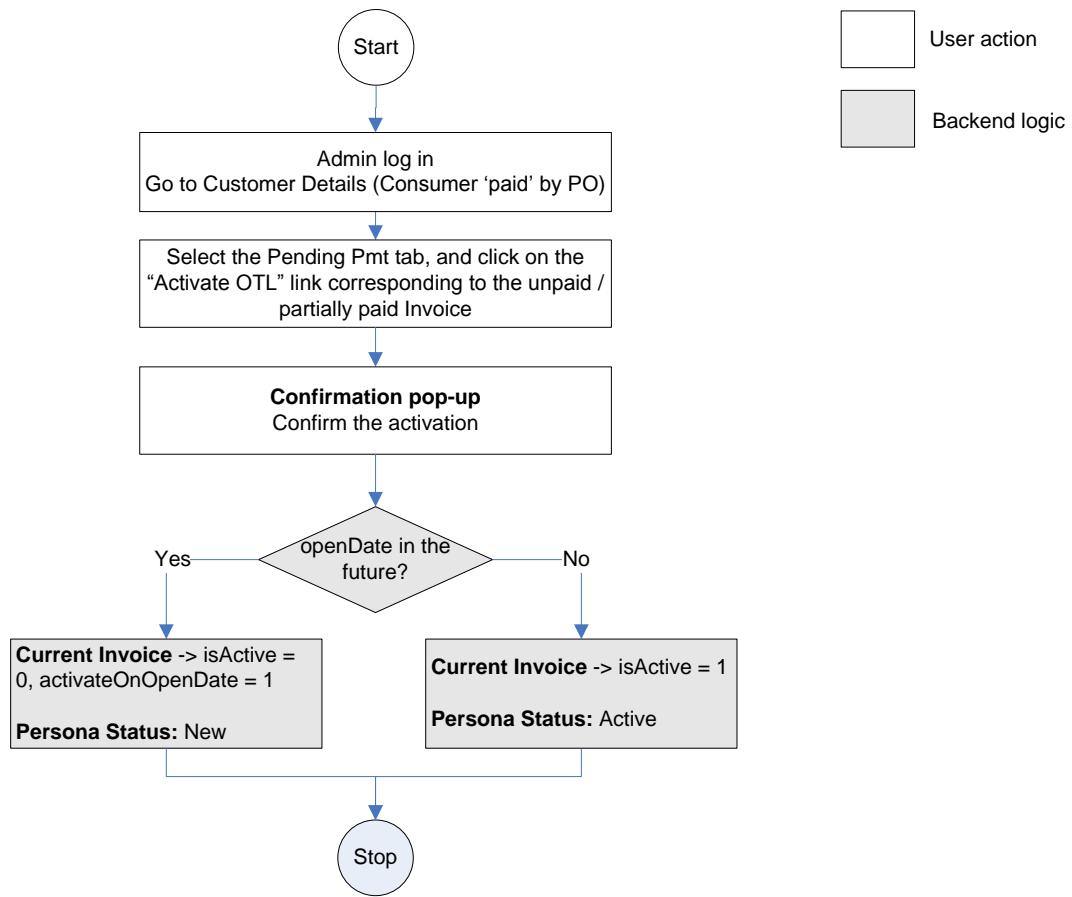


Fig 3.10 Grant OTL Access (Activate Invoice) from Admin Site

# 3.6 [Consumer] Apply Payment to Invoice – Admin Site

This flow is followed by Customer Support representatives who confirm partial or full payment of unpaid or partially paid Invoices coming from a Consumer.

The figure consists of three vertically stacked screenshots of the lynda.com admin site, showing the steps to apply payment to an invoice. Each screenshot includes a red vertical arrow on the right side indicating the sequence of actions:

- Screenshot 1:** The 'Customer Details' page for Ada Miron. The 'Billing' section shows an outstanding amount of \$37.50. A red arrow labeled '1' points down to the 'Apply payment' button.
- Screenshot 2:** The 'Apply Payment to Invoice' page for Invoice #5075156. The 'Payment Is:' dropdown is set to 'Check'. A red arrow labeled '2' points down to the 'Enter Note:' field, which contains 'partial payment'.
- Screenshot 3:** The same 'Apply Payment to Invoice' page after the payment has been applied. The 'Payment Is:' dropdown is now set to 'Discount'. The 'Enter Note:' field still contains 'partial payment'.

Fig 3.11 [Admin Site] Apply Payment to Invoice

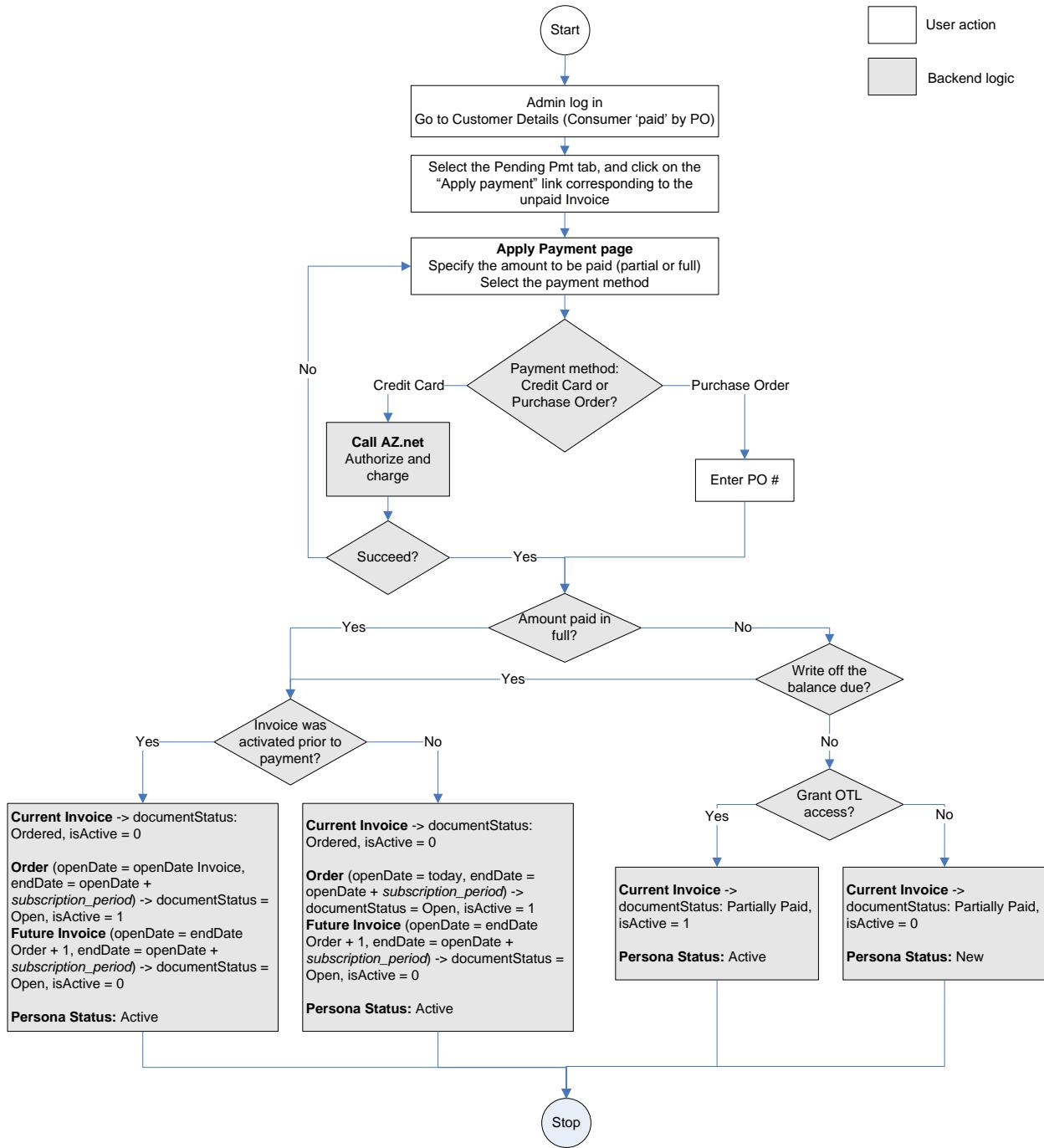


Fig 3.12 Apply Payment to Invoice from Admin Site

# 3.7 [Consumer] Upgrade Membership (Change Plan) – Public Site

This flow is followed by existent Consumers who want to upgrade their membership from an inferior subscription (Monthly, Monthly Premium, Annual) to a superior one (Monthly Premium, Annual, Annual Premium). This option is not available to consumers with Annual Premium subscription.

**Step 1: Subscription Change**

**Online Training Library® Subscription Change**

1 Subscription Plan    2 Billing Information    3 Keep Learning!

Welcome Ada Miron,  
Your current membership plan is: Monthly

Select a Subscription Plan	Plan Price (USD)	Effective Date	Credit	Net Cost (USD)
Monthly Subscription (Your Current Plan)	\$25.00/month	07/19/2011	N/A	N/A
<input checked="" type="radio"/> Monthly Premium Subscription	\$37.50/month	07/19/2011	\$25.00*	\$12.50*

This option will upgrade your plan.  
If you upgrade your subscription plan, the new plan will take effect immediately once your payment has been processed.  
\* A credit of \$25.00 will be applied to your current bill. The regular price of \$37.50 will be charged on your next scheduled bill date.

[continue >](#) [no changes... return to your account](#)

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**Step 2: Subscription Change**

**Online Training Library® Subscription Change**

1 Subscription Plan    2 Billing Information    3 Keep Learning!

Online Training Library® Subscription Plan

Effective Date	Net Cost (USD)
07/19/2011	\$12.50

Total: \$12.50

Please review and complete your information.

**Billing Information**

First Name: Ada
Last Name: Miron
Company/Org. Name:
Address: RO
Apt/Suite:
City: Cluj-Napoca
State/Province:
Zip/Postal Code:
Country: Romania
Phone: 1234566
Billing Email: adaConsumerAdmin@yol
How did you hear about us? Select one...

\* indicates a required field

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**Step 3: Subscription Change: Complete**

**Online Training Library® Subscription Change: Complete**

1 Subscription Plan    2 Billing Information    3 Keep Learning!

[print receipt](#)

Online Training Library® Subscription Plan

Effective Date	Net Cost (USD)
07/19/2011	\$12.50

Order Date: 07/19/2011 10:23:20 AM Order Number: 4978239 Visa -1111

Next Bill Date: 08/19/2011 Next Bill Amount: \$37.50

Thank you for subscribing to the lynda.com Online Training Library®. Your receipt has been emailed to you.

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Fig 3.13 [Public Site] Consumer Upgrade (Change Plan)

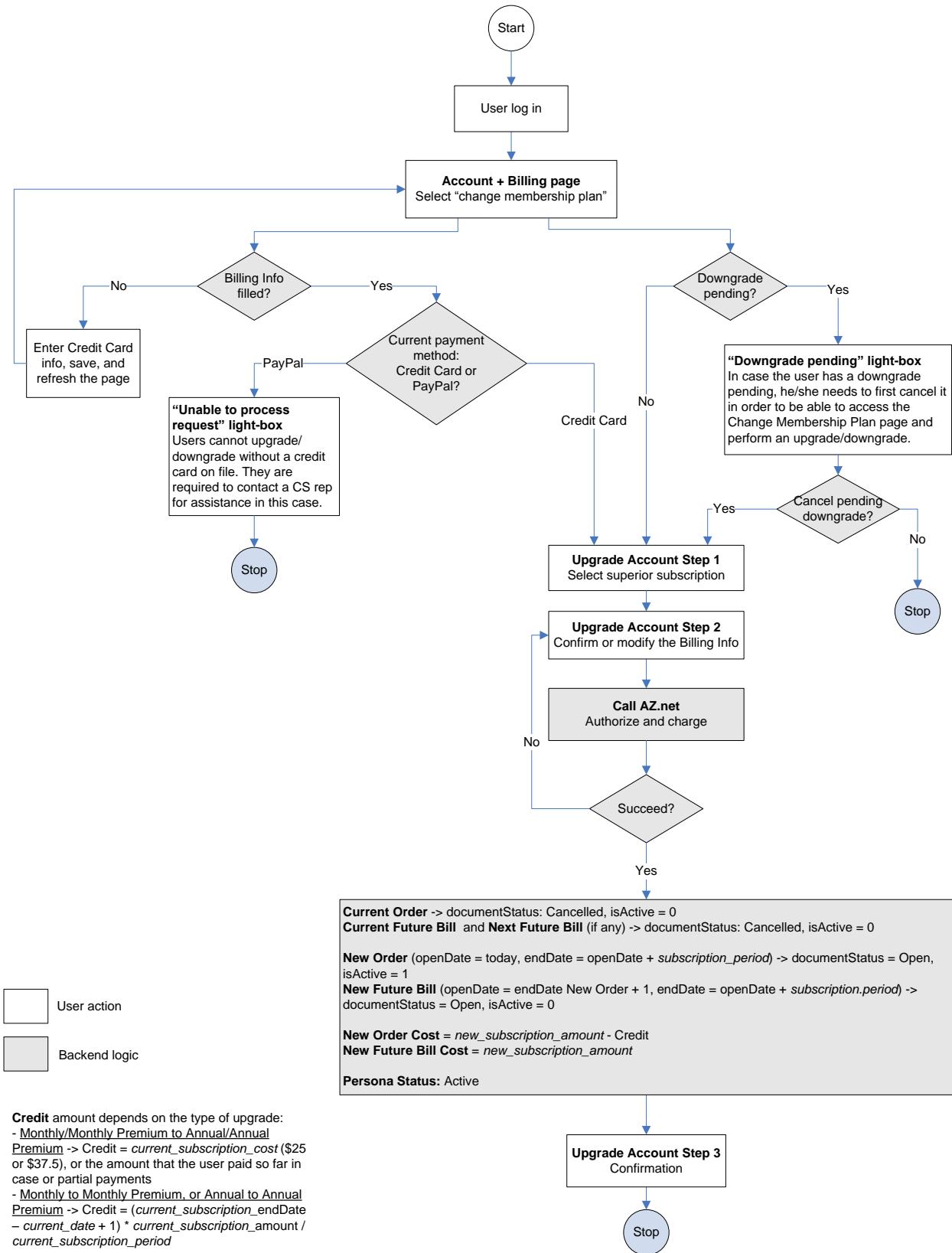


Fig 3.14 Consumer Upgrade (Change Plan) from Public Site

# 3.8 [Consumer] Upgrade Membership (New Quote) –

## Admin Site

This flow is followed by Customer Support representatives who upgrade a consumer's membership from an inferior subscription (Monthly, Monthly Premium, Annual) to a superior one (Monthly Premium, Annual, Annual Premium), at the customer's request. This option is not available to consumers with Annual Premium subscription.

The flow can only be completed by using New Quote.

**Step 1: Create Quote**

The user is on the 'Create Quote' page. They select 'lynda.com Monthly Premium' as the product and 'Upgrade/Downgrade' as the quote type. They enter the quote number '4984779' and the discount reason 'Select one...'. They also enter the start date (07/20/2011), expiration date (08/20/2011), and duration (1 Month). A note states: 'Please select a product and a quote type, enter the number of licenses and adjust the period if needed, insert a discount code and price (depending on the product). When you finish, hit the Enter button.'

**Step 2: Subscription Signup Step 2 - Enter Billing Information**

The user is on the 'Subscription Signup Step 2' page. They enter the quote number '4984779' and the quote type 'Upgrade/Downgrade'. They select 'MonthlyPremium' as the current subscription and '8/20/2011' as the expiration date. The total cost is \$23.79. A note says: 'You have successfully created a OTL Monthly Premium account for Adam Arbogast. The credit card was successfully charged with \$23.79'.

**Step 3: Confirm Payment Type**

The user is on the 'Confirm Payment Type' page. They select 'Credit Card' as the payment method. A note says: 'If you have a discount code, enter it to receive a discount on your lynda.com subscription.'

**Step 4: Credit Card Information**

The user is on the 'Credit Card Information' page. They enter the credit card details: Card Type: Visa, Credit Card Number: 4413 3234 5678 9123, Expiration Date: 07/20/2011, Name on Card: Adam Arbogast, and Credit Card Security Code: 123. The amount is \$23.79. A note says: 'Amount: \$23.79 (save \$13.11 on the first bill. Regular fee of \$37.50 will be billed every month starting next month.)'

**Step 5: Confirmation Message**

The user is on the 'Confirmation Message' page. A message says: 'Quote 4984779 has been successfully created.' There are 'OK' and 'Cancel' buttons.

Fig 3.15 [Admin Site] Consumer Upgrade (New Quote)

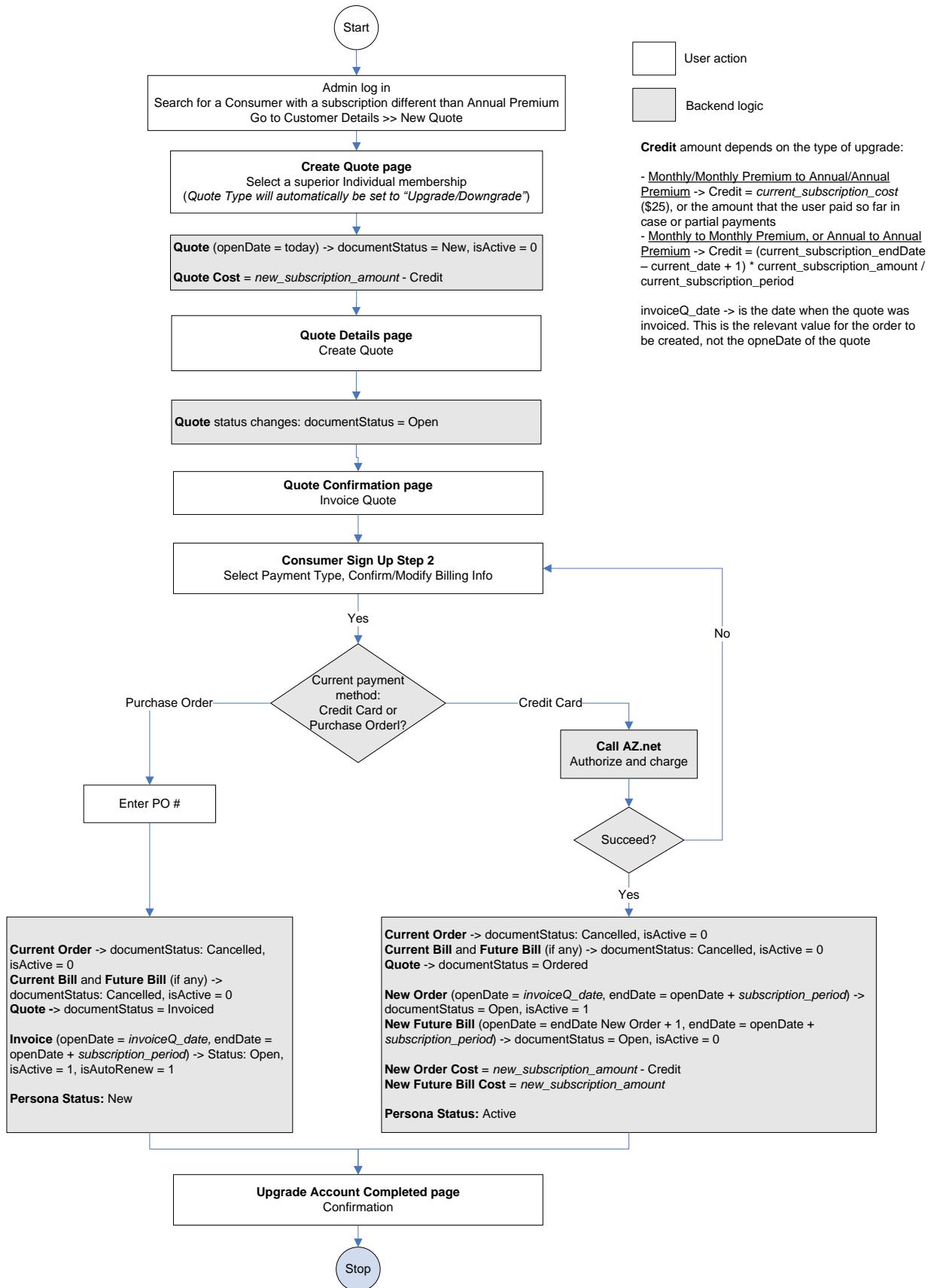


Fig 3.16 Consumer Upgrade (New Quote) from Admin Site

## 3.9 [Consumer] Upgrade to lyndaPro – Admin Site

This flow is followed by Customer Support representatives who upgrade a consumer's membership from an Individual subscription to a lyndaPro subscription. This action will not affect this customer's Consumer persona; it will simply add a new persona (lyndaPro Master Admin) to the account.

This is the only action besides creating brand new accounts that can be performed from the Admin site without the help of New Quotes.

Note: In case the Consumer would like to purchase another product besides lyndaPro, the Customer Support representative can use New Quotes for this operation, having the same end result as in the case of 'Upgrade to lyndaPro' -> new document(s) is created and a new persona is added for the given user.

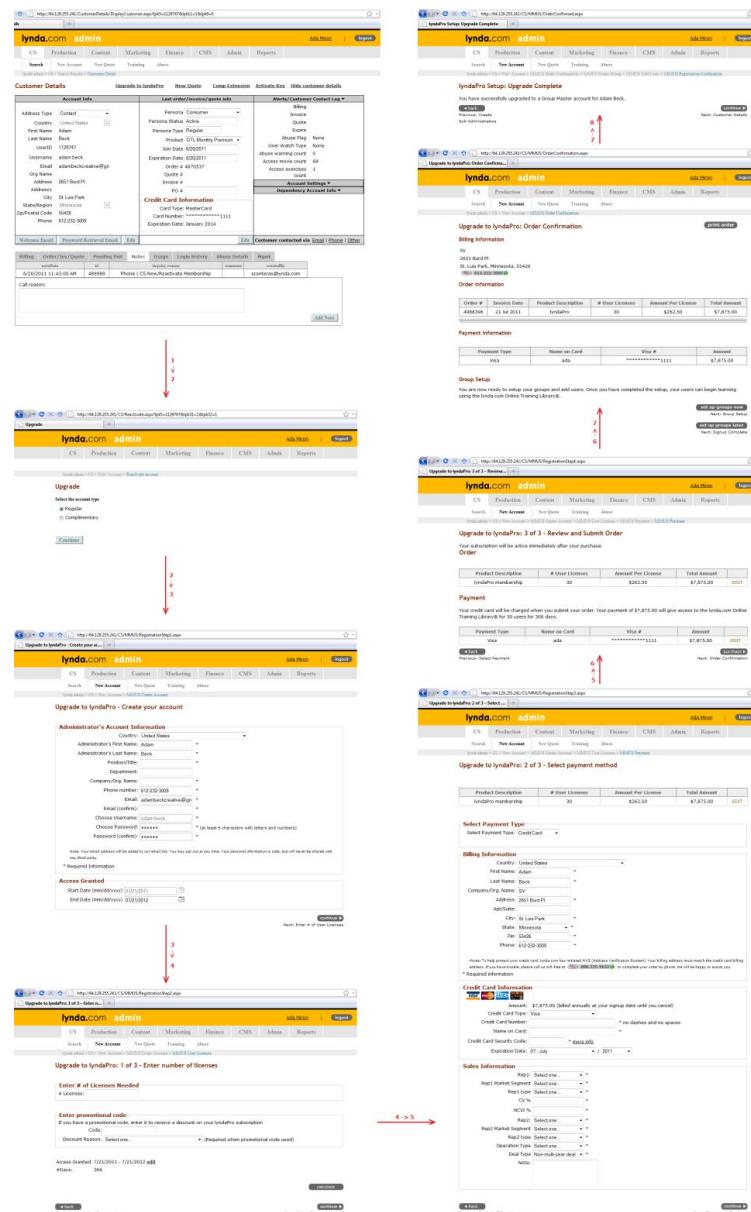


Fig 3.17 [Admin Site] Consumer Upgrade to lyndaPro

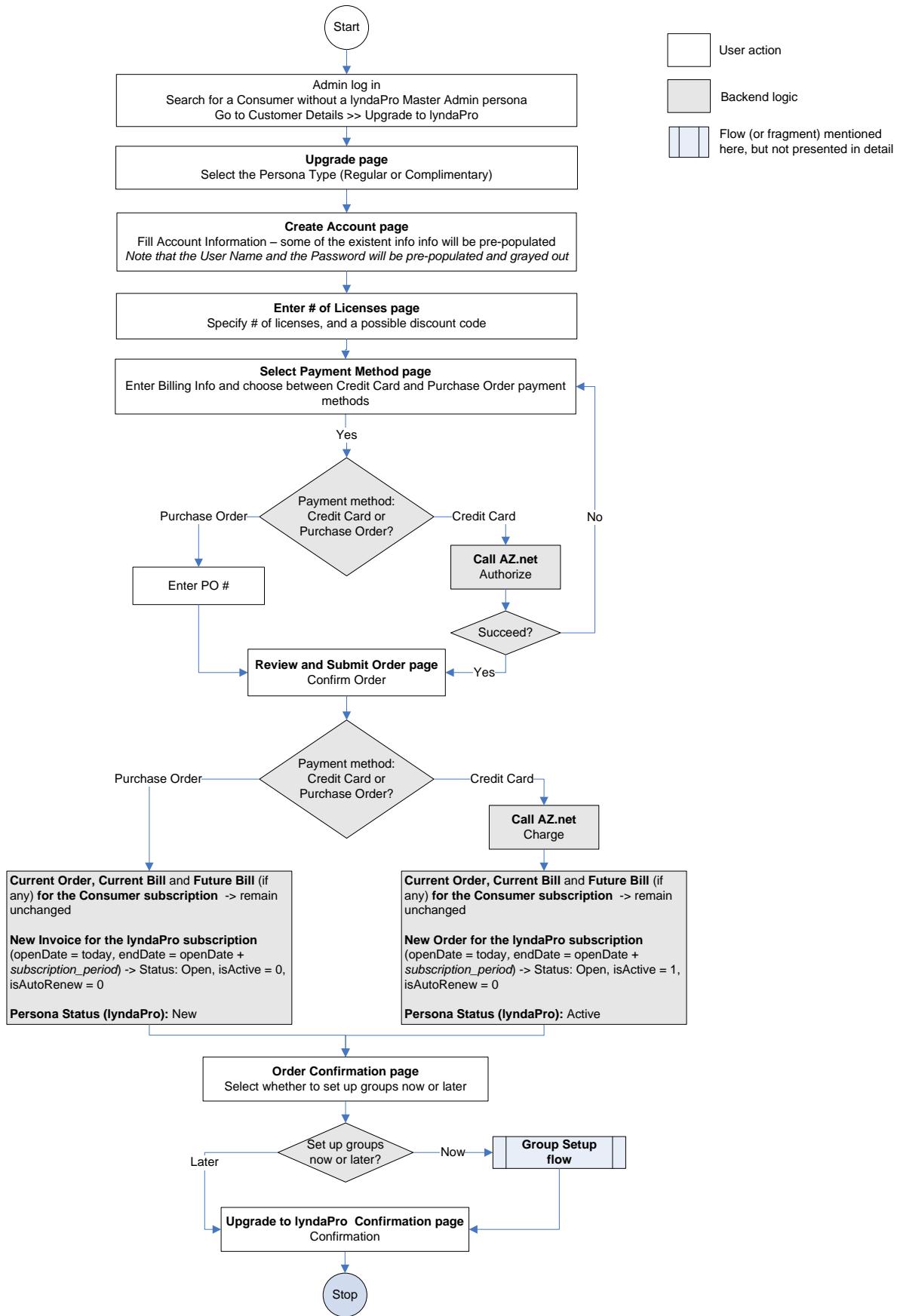


Fig 3.18 Consumer Upgrade to lyndaPro from Admin Site

# 3.10 [Consumer] Downgrade Membership (Change Plan) – Public Site

This flow is followed by existent Consumers who want to downgrade their membership from an superior subscription (Monthly Premium, Annual, Annual Premium) to an inferior one (Monthly, Monthly Premium, Annual). This option is not available to consumers with Monthly subscription.

The downgrade will not take effect immediately, but only at the end of the current subscription period.

The screenshots illustrate the consumer downgrade process on the lynda.com public site:

- Step 1: Account + Billing**  
The user is on the 'Account + Billing' page. A red arrow points down to the 'Change membership plan' button.
- Step 2: Subscription Change Confirmation**  
The user has selected a new plan and is now on the 'Subscription Change Complete' page. A red arrow points down to the 'Keep Learning!' button.
- Step 3: Subscription Change Step 1**  
The user is on the 'Subscription Plan' step of the process. A red arrow points down to the 'Billing Information' section.
- Step 4: Subscription Change Step 2**  
The user is on the 'Billing Information' step of the process. A red arrow points down to the 'Review and complete your information' section.

**Subscription Plan Selection:**

Select a Subscription Plan	Plan Price (USD)	Effective Date	Credit	Net Cost (USD)
<input type="radio"/> Monthly Subscription	\$25.00/month	08/17/2013	N/A	N/A
<input checked="" type="radio"/> Monthly Premium Subscription	\$37.50/month	08/17/2013	N/A	N/A

**Billing Information:**

Online Training Library® Subscriptions Plan	Effective Date	Net Cost (USD)
Monthly Premium Subscription	08/17/2013	\$0.00

**Review and Complete:**

Please review and complete your information.

**Credit Card Information:**

Amount: \$0.00 (\$0.00 will be charged today. The regular fee of \$37.50 will be billed every month starting 08/17/2013.)  
 Credit Card Type: Visa edcharbone  
 Credit Card Number: \*\*\*\*1111  
 Name on Card: Ada  
 Expiration Date: August 2013

**I have read and agree to the Terms and Conditions.**

Fig 3.19 [Public Site] Consumer Downgrade (Change Plan)

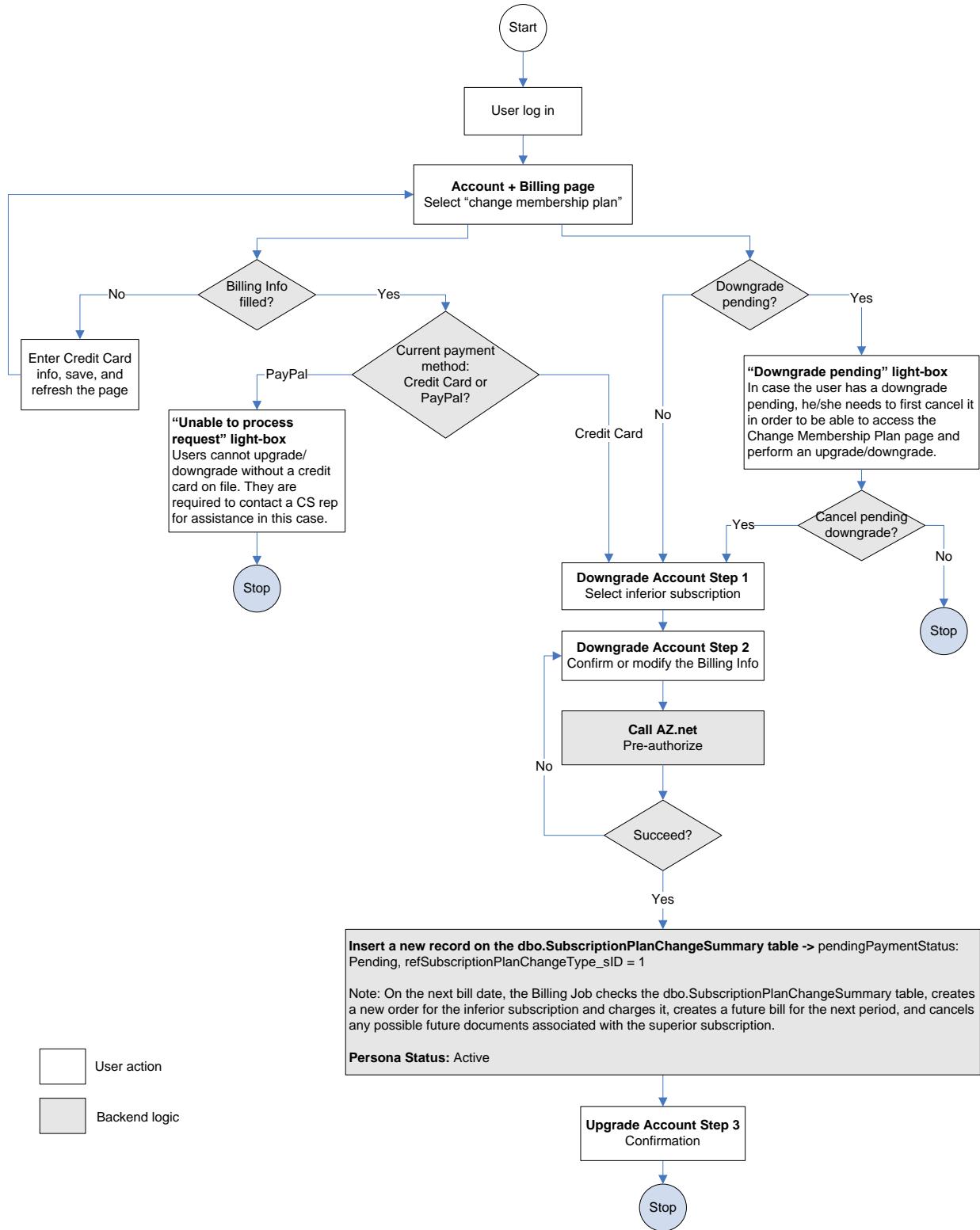


Fig 3.20 Consumer Downgrade (Change Plan) from Public Site

## 3.11 [Consumer] Downgrade Membership (New Quote) – Admin Site

This flow is followed by Customer Support representatives who downgrade a consumer's membership from a superior subscription (Monthly Premium, Annual, Annual Premium) to an inferior one (Monthly, Monthly Premium, Annual), at the customer's request. This option is not available to consumers with Monthly subscription.

The flow can only be completed by using New Quote. For the visual flow, please check the [Consumer Upgrade \(New Quote\) – Admin Site](#), which is similar.

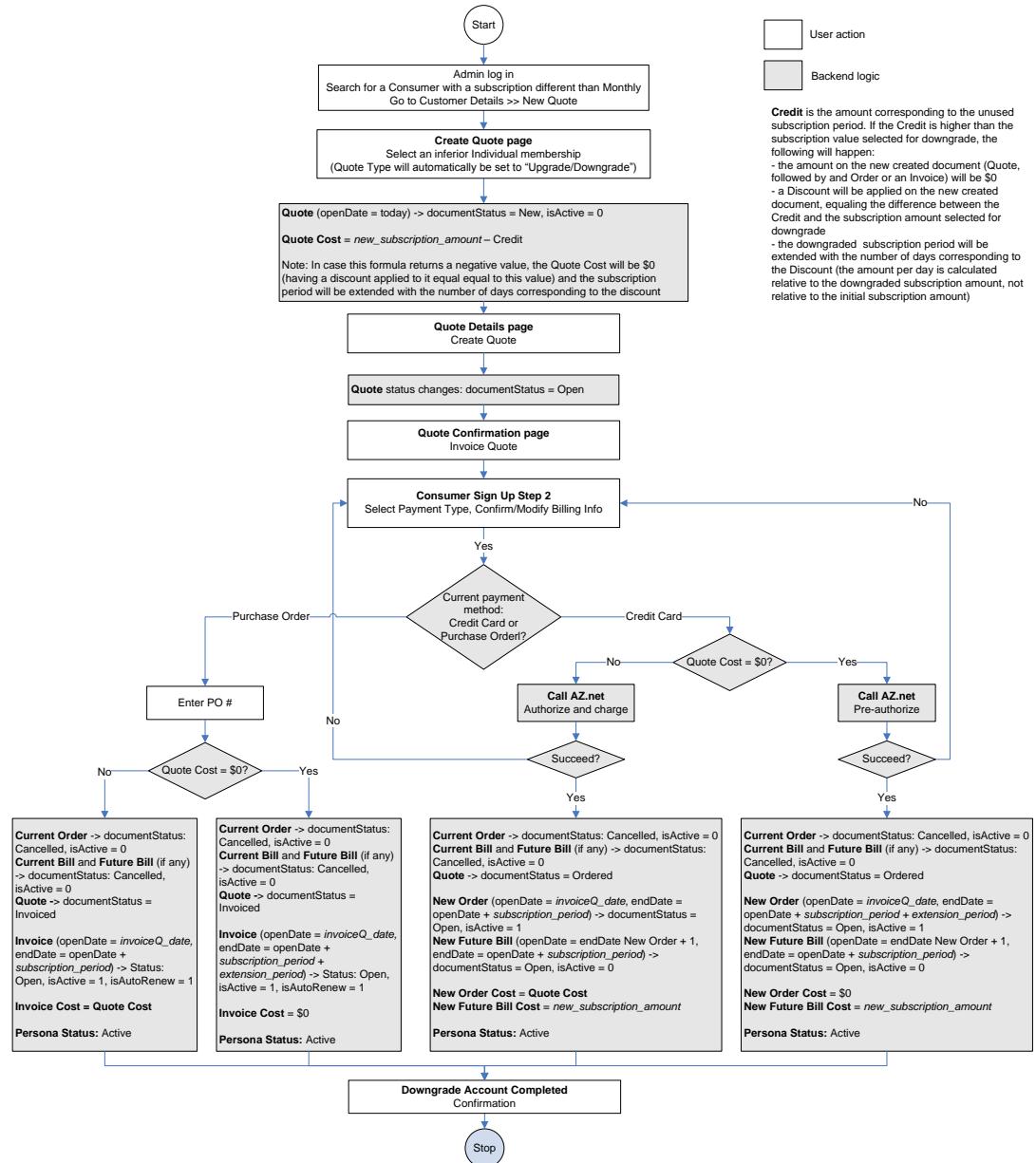


Fig 3.21 Consumer Downgrade (New Quote) from Admin Site

## 3.12 [Consumer] Renew Membership – Public Site

This flow is followed by existent Consumers with the following statute: canceled Consumers who have not ended their availability period yet (End Date is in the future) and have chosen as payment methods Credit Card or PayPal, or active not auto-renew Consumers paid by Credit Card (which can only be created from the Admin site).

This option is not available to active auto-renew Consumers who want to renew earlier, nor to Consumer accounts paid by Purchase Order.

Note: At this point, the flow is under development and it consists of 2 phases: first will be covered the accounts paid by Credit Card, following that when this is completed to begin implementing the logic for the accounts paid by PayPal.

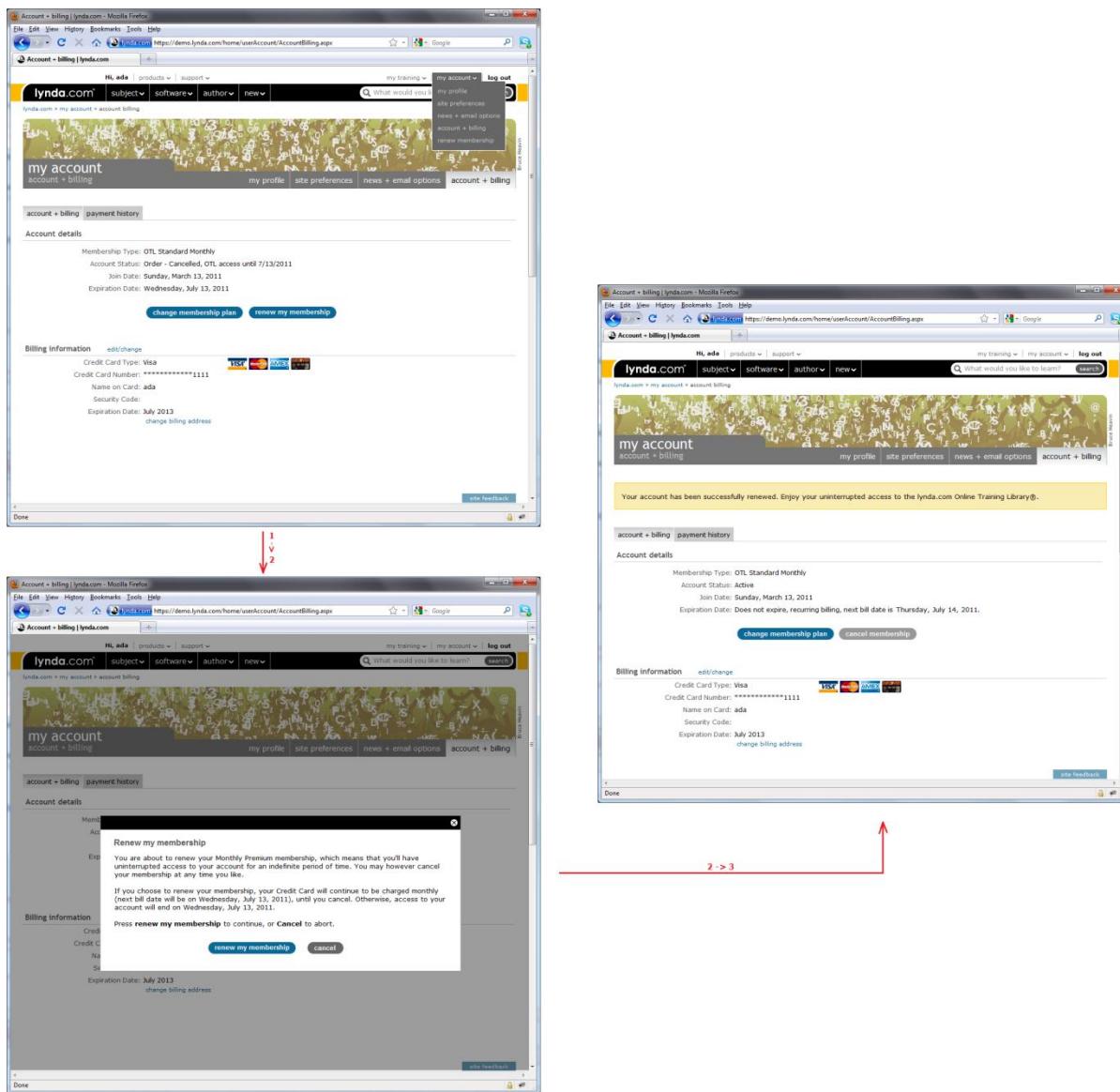


Fig 3.22 [Public Site] Consumer Renewal

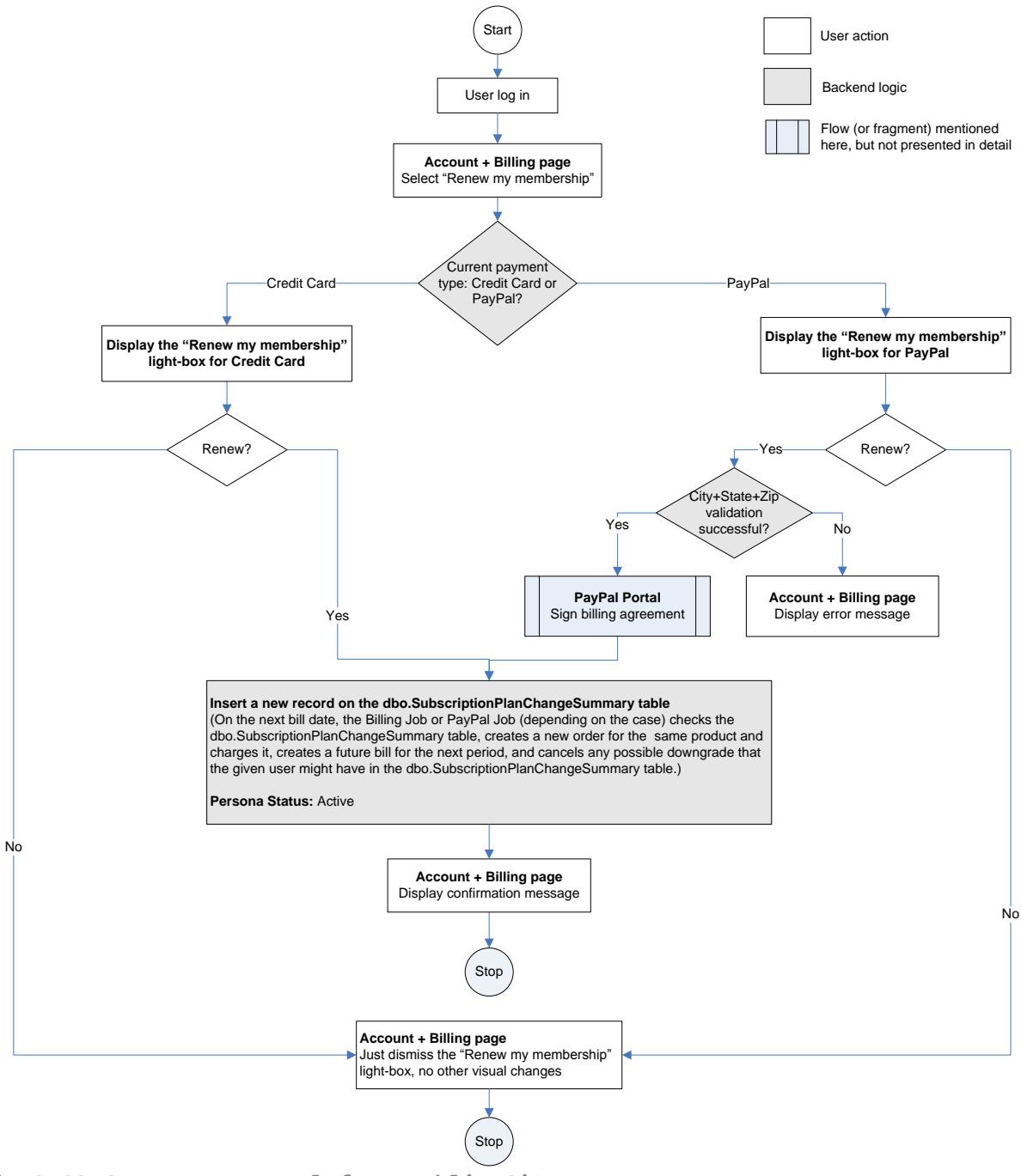


Fig 3.23 Consumer Renewal from Public Site

# 3.13 [Consumer] Renew Membership (New Quote) – Admin Site

This flow is followed by Customer Support representatives who renew a Consumer's membership (choosing the same subscription type) found in one of the following statutes: canceled Consumers who have not ended their availability period yet (End Date is in the future) and have chosen as payment methods Credit Card or Purchase Order, or active not auto-renew Consumers paid by Credit Card or Purchase Order. This can also be done for auto-renew Consumers, but it's not recommended -> for this case, it's better to just pay the future bill in advance (see next section).

The flow can only be completed by using New Quote.

**Step 1: Create a New Quote**

The first screenshot shows the 'Create a New Quote' page. A red arrow points down from the top of the page to the 'Enter Notes' field. A red number '1' is positioned to the left of the notes field.

**Step 2: Billing Information**

The second screenshot shows the 'Billing Information' step of the renewal process. A red arrow points down from the top of the page to the 'Access Granted' section. A red number '2' is positioned to the left of the access granted section.

**Step 3: Payment Type Selection**

The third screenshot shows the 'Select Payment Type' section. A red arrow points down from the top of the page to the 'Credit Card' button. A red number '3' is positioned to the left of the credit card button.

**Step 4: Confirmation Message**

The fourth screenshot shows a confirmation message: 'Quote #500334 has been successfully created.' A red arrow points down from the top of the page to the 'OK' button. A red number '4' is positioned to the left of the OK button.

**Step 5: Confirmation Details**

The fifth screenshot shows the 'Confirmation Details' page for quote #500334. A red arrow points down from the top of the page to the 'Print' button. A red number '5' is positioned to the left of the print button.

Fig 3.24 [Admin Site] Consumer Renewal (New Quote)

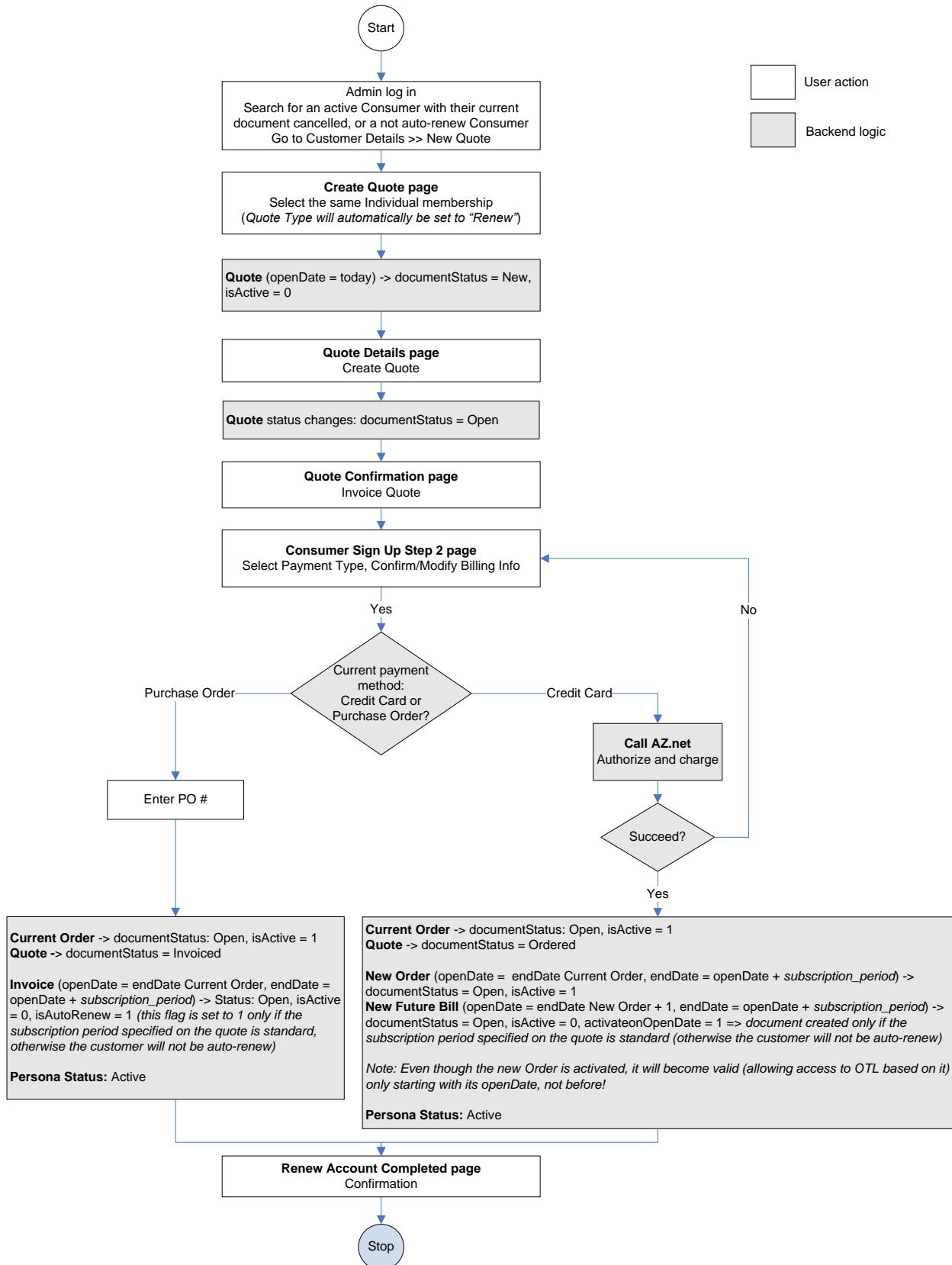


Fig 3.25 Consumer Renewal (New Quote) from Admin Site

# 3.14 [Consumer] Earlier Renewal (Pay Future Bill) – Admin Site

This flow is followed by Customer Support representatives who pay earlier a future bill at the Consumer's request, thus renewing their current membership for the next period. This option is available only to auto-renew accounts, which have future bills automatically created by the system, and payment can only be done by Credit Card (for accounts paid by other payment methods, Credit Card info needs to be provided).

**Customer Details**

Account Info		Last order/invoice/quote info		Alerts/Customer Contact Log	
Address Type: Contact	Country: Romania	Persona: Consumer	Person Status: Active	Billing	Invoice
First Name: Ada	Last Name: Miron	Persona Type: Regular	Product: OTL Standard Annual	Quote	Expire
UserID: 1139281	Username: adaconsadmin5	Join Date: 7/21/2011	Expiration Date: 1/21/2012	Abuse Flag: None	User Watch Type: None
Email: amiron@softvision.ro	Org Name: RO	Order #: 4988328	Quote #:	Abuse warning count: 0	Access movie count: 0
Address: RO	Address1: Cluj-Napoca	Invoice #:	PO #:	Access exercises count: 0	
City: Cluj-Napoca	State/Region:	Credit Card Information			
Zip/Postal Code: 1234556	Phone:	Card Type: Visa	Card Number: ****1111		
Expiration Date: July 2011					

Welcome Email | Password Retrieval Email | Edit | Customer contacted via: Email | Phone | Other

Type	Number	Created Date	Due date	Product	Created By	Status	Amount due	Amount paid	Outstanding	Actions
Bill	4988329	7/21/2011 13:45:55 AM	1/21/2012 12:00:00 AM	OTL Standard Annual	Ada Miron	Open	\$250.00	\$0.00	\$250.00	Bill now

**Change Credit Card and Billing Info**

**Credit Card Information**

Visa American Express

Credit Card Type: Visa  
Credit Card Number: \*\*\*\*1111 \* no dashes and no spaces  
Name on Card: ada  
Credit Card Security Code: \* more info  
Expiration Date: 07-July / 2011

Change billing address  
Submit | Cancel

**Untitled Page**

The credit card was successfully charged with \$250. The customer's account is now active. The customer can access the site right away.

Continue

Fig 3.26 [Admin Site] Consumer Earlier Renewal (Pay Future Bill)

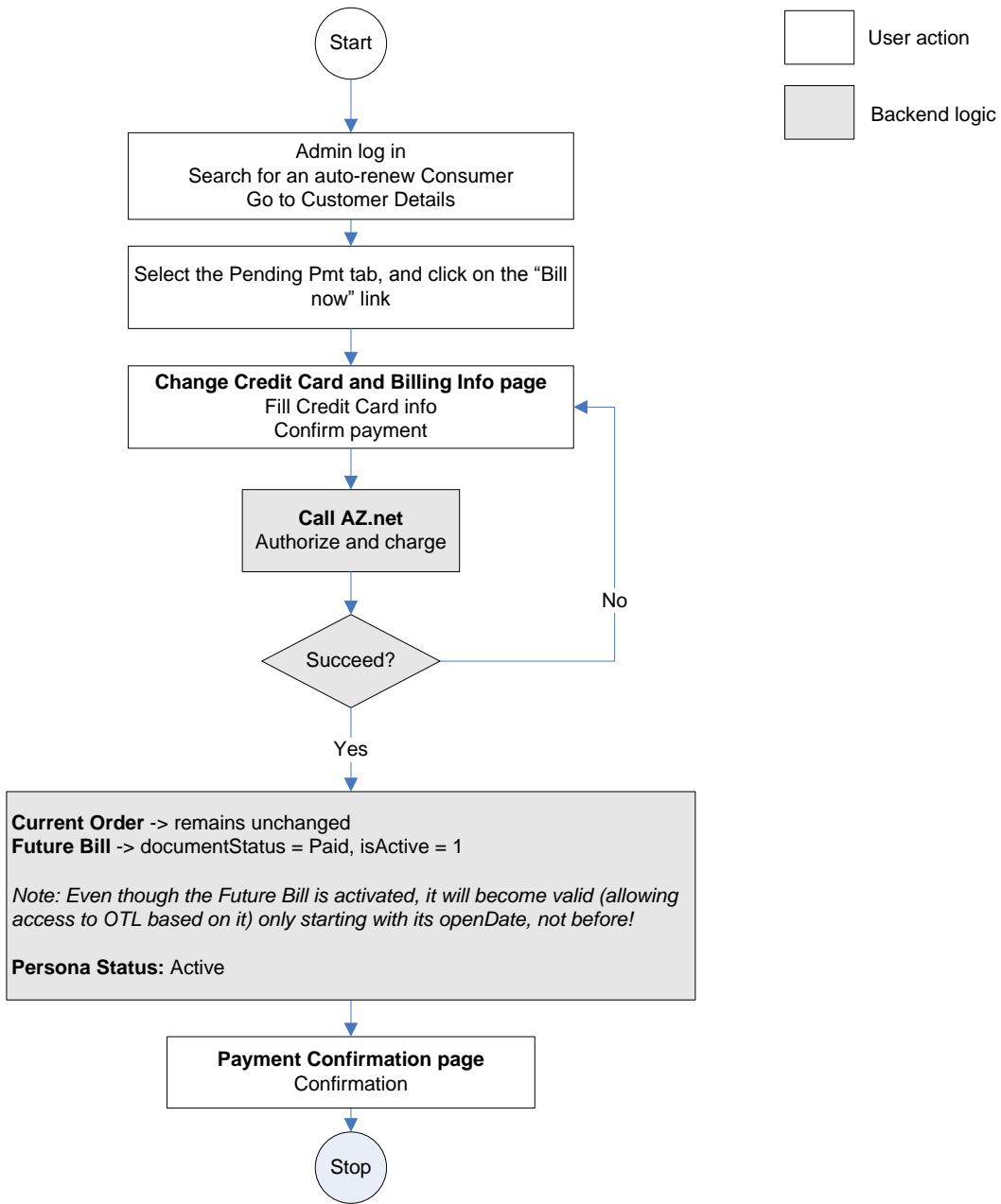


Fig 3.27 Consumer Earlier Renewal (Pay Future Bill) from Admin Site

## 3.15 [Consumer] Cancel Membership – Public Site

This flow is followed by existent auto-renew Consumers that want to end their subscription starting with the next billing period. After cancelling, they will still have access to their account until the current End Date.

The figure consists of two screenshots of a web browser displaying the lynda.com account + billing page. The top screenshot shows the main account details and billing information section. The bottom screenshot shows a modal dialog for canceling the membership.

**Screenshot 1: Account + Billing Page**

Membership Type: OTL Standard Monthly  
Account Status: Active  
Join Date: Thursday, July 28, 2011  
Expiration Date: Does not expire, recurring billing, next bill date is Sunday, August 28, 2011.

Billing information

Credit Card Type: Visa  
Credit Card Number: \*\*\*\*1111  
Name on Card: ada  
Security Code:  
Expiration Date: July 2011  
 Email me a receipt each time I am charged for service from lynda.com.

**Screenshot 2: Cancel My Membership Dialog**

Cancel my membership

Are you sure you want to cancel your lynda.com Online Training Library® membership?  
We hate to see you go, but we also understand that sometimes you might want a break. We'll be here when you're ready to come back! When you're ready, just reactivate your membership with your current user name and password, and all of your learning history, bookmarks, and Certificates of Completion will still be waiting for you to start learning again.

Let us know the key reason why you are cancelling your membership today:

What could we have done to keep you as a member? We appreciate your candid feedback.

By clicking on the yes, cancel my membership link below, you will be canceling your service as of the end of this current billing period (it's not prorated). Your account won't be billed starting on your next billing date. You'll still have access to the Online Training Library® until your next billing date, and then access will stop until you choose to reactivate your account.

Fig 3.28 [Public Site] Cancel Consumer Membership

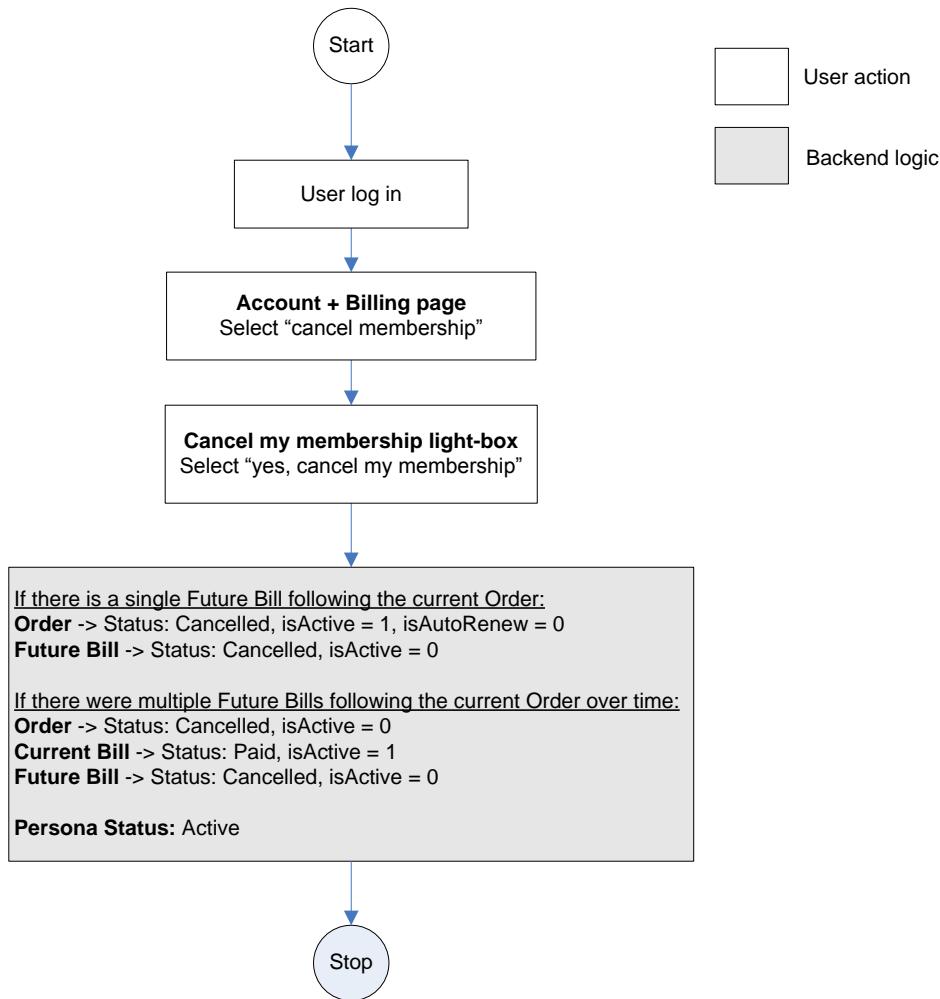


Fig 3.29 Cancel Consumer Membership from Public Site

# 3.16 [Consumer] Cancel Membership (Cancel Order) – Admin Site

This flow is followed by Customer Support representatives who cancel a customer's subscription due to abusive behavior, or at the customer's request. Cancel may or may not be accompanied by a refund (partial or full), and the Customer Support representative is given the possibility to leave the OTL access until the current document expires, or to remove it from the given customer (in which case the customer will no longer be able to access their account from the moment of cancellation).

Using this same flow, the Customer Support representative can just offer a refund to the customer (partial or full) without cancelling their account. Or it's possible to set a customer as abusive, in which case the current documents remain untouched, but the user is prevented from logging into the account.

**Step 1:** Order Details page (http://64.129.255.241/CS/OrderDetails.aspx?pid=10894). Shows order details for Julian Brock, order #16894, total \$25.00.

**Step 2:** Order Canceled page (http://64.129.255.241/CS/CancelOrderMessage.aspx?pid=105250). Shows a success message about a \$25.00 refund.

**Step 3:** Cancel with refund page (http://64.129.255.241/CS/CancelOrderWithRefund.aspx?pid=448660&pid=10894). Shows credit/refund amount (\$25.00), payment method (PayPal), and a note about customer OTL access.

**Step 4:** Credit/Refund Amount page (http://64.129.255.241/CS/CreditRefundAmount.aspx?pid=448660&pid=10894). Shows credit date (7/22/2011), user (Julian Brock), product purchased (OTL Standard Monthly), amount paid (\$25.00), and a note about a \$25.00 refund.

**Step 5:** OTL Access page (http://64.129.255.241/CS/OTLAccess.aspx?pid=448660&pid=10894). Shows options to remove OTL access (radio buttons for 'Yes' and 'No'), a 'Select credit or refund' section, a 'Refund Reason' dropdown, and sections for 'User Watch Type' and 'Cancellation Reason'.

Fig 3.30 [Admin Site] Cancel Consumer Membership (Cancel Order)

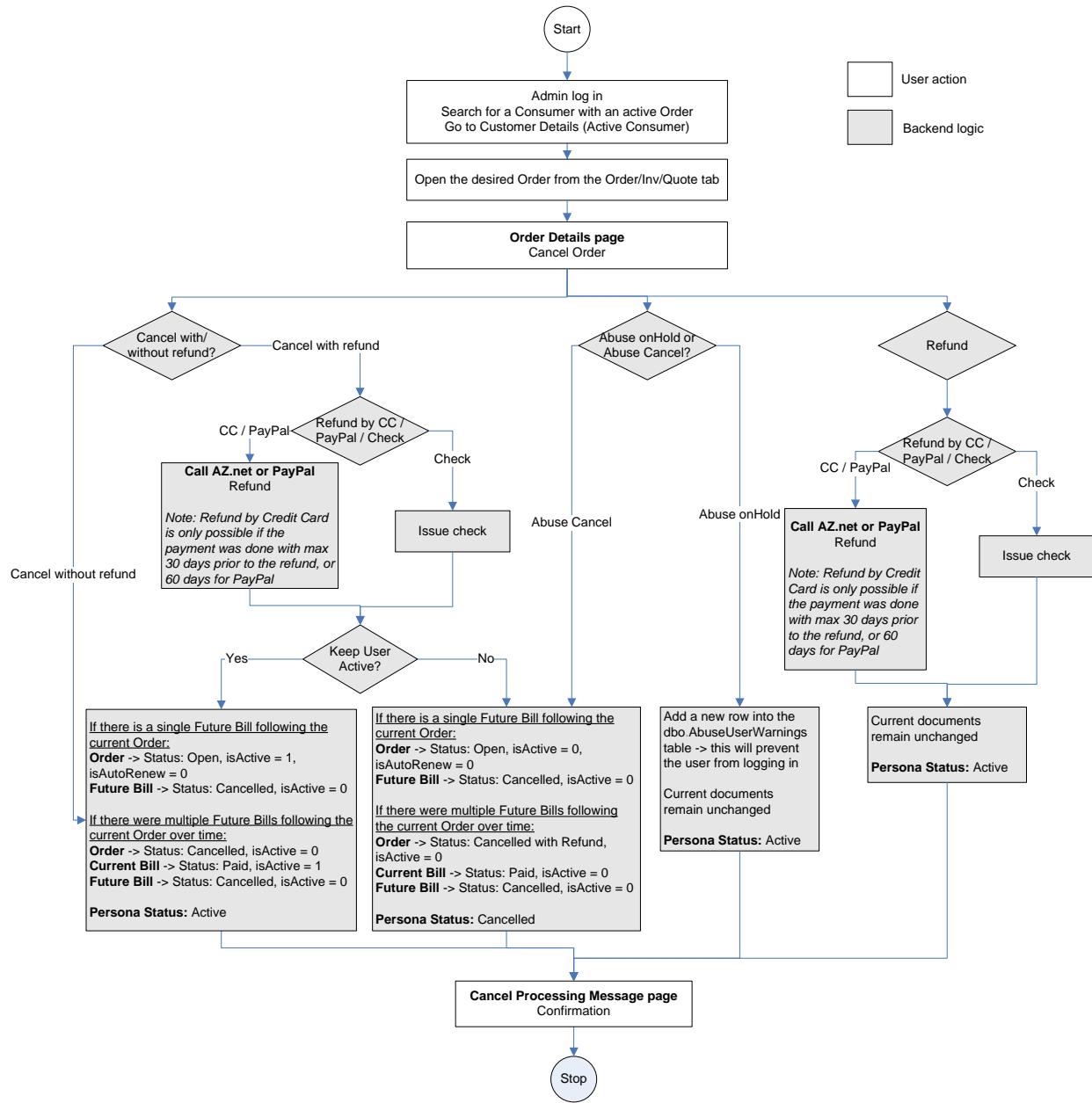


Fig 3.31 Cancel Consumer Membership (Cancel Order) from Admin Site

# 3.17 [Consumer] Cancel Membership (Cancel Invoice)

## – Admin Site

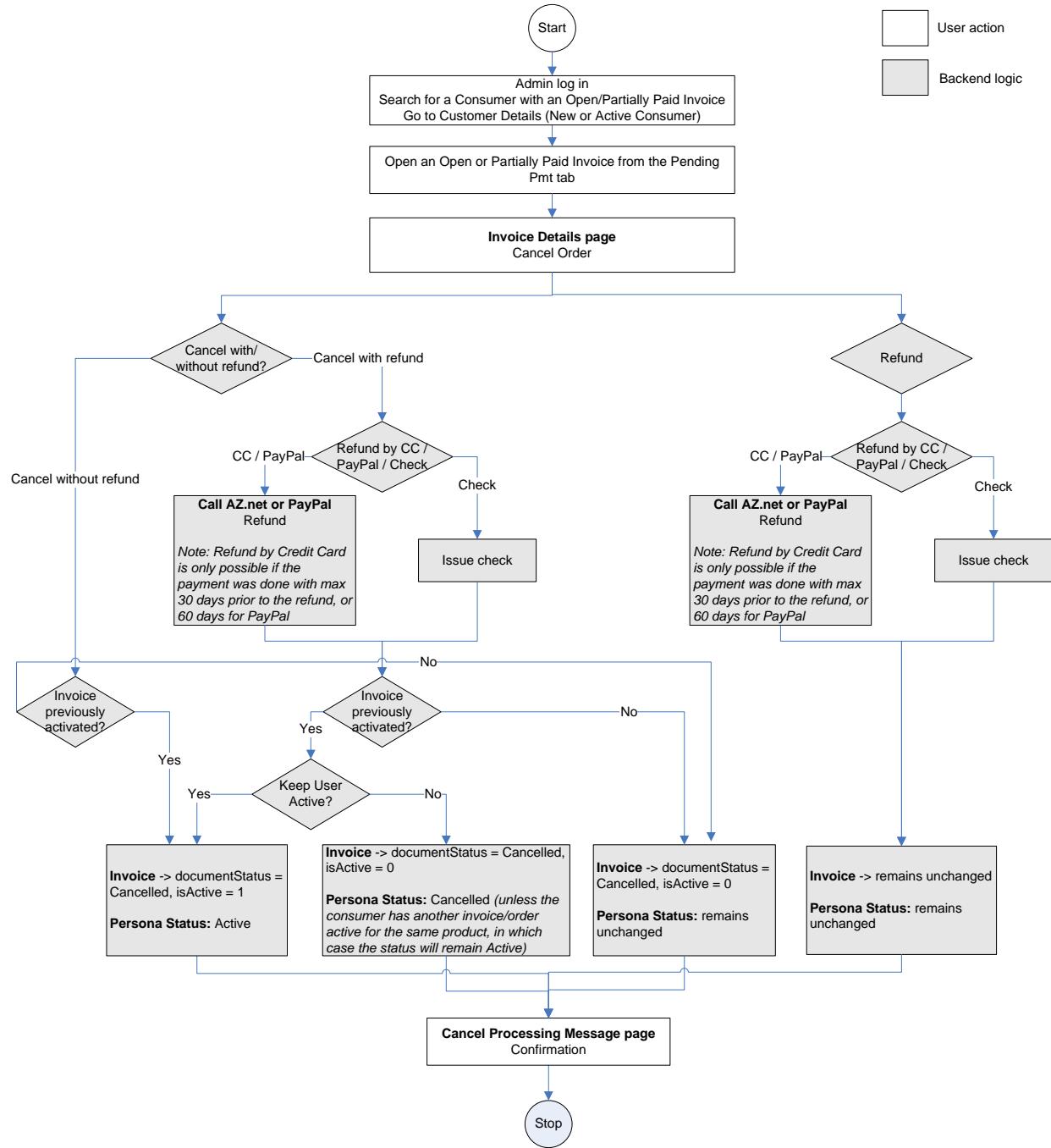
This flow is followed by Customer Support representatives who cancel a customer's subscription due to failure in applying payment to purchase orders in due time, abusive behavior, or at the customer's request. Cancel may or may not be accompanied by a refund (partial or full), and the Customer Support representative is given the possibility to leave the OTL access (in case the invoice was prior activated) until the current document expires, or to remove it from the given customer (in which case the customer will no longer be able to access their account from the moment of cancellation).

Using this same flow, the Customer Support representative can just offer a refund to the customer (partial or full) without cancelling their account -> the refund cannot exceed the amount paid by the customer.

The figure consists of three screenshots of the lynda.com admin site, each showing a different step in the cancellation process:

- Screenshot 1: Invoice Details**  
This screenshot shows the 'Invoice Details' page for invoice #5009433. It displays contact information for Kelly Adams, invoice details (Invoice Date: 7/28/2011, Customer ID: 989089, Invoice Status: Open, Invoice Amnt: \$250.00), and payment information (Print, Bill To: Kelly Adams, Invoice Date: 7/28/2011, Customer ID: 989089, Invoice Status: Open, Invoice Amnt: \$250.00). Below this is the 'INVOICE DETAIL' section, which lists product information and totals. At the bottom, there is a note: "Thank you for considering lynda.com for your training needs." and a navigation bar with Back, Activate OTL, Apply Payment, and Cancel Invoice buttons. A vertical red arrow on the right points downwards through the page content.
- Screenshot 2: Cancel Invoice**  
This screenshot shows the 'Cancel Invoice' page. It asks the user to select a cancel option: 'Cancel without refund or credit' (selected), 'Cancel with refund or credit', or 'Refund'. Below this are 'Back' and 'Continue' buttons. A vertical red arrow on the right points downwards through the page content.
- Screenshot 3: Cancel processing message**  
This screenshot shows a confirmation message: 'Cancel processing message'. It states: 'The Server at Admin.lynda.com says ...', 'The cancellation was processed successfully.', and 'The cancellation number is 5012583.' There is an 'OK' button at the bottom. A vertical red arrow on the right points downwards through the page content.

Fig 3.32 [Admin Site] Cancel Consumer Membership (Cancel Invoice)



**Fig 3.33 Cancel Consumer Membership (Cancel Invoice) from Admin Site**

## 3.18 [Consumer] Reactivate Membership – Public Site

This flow is followed by expired/cancelled Consumers who wish to reactivate their Individual membership. The only available payment method in this case is by Credit Card.

It's possible for expired/cancelled Consumers to reactivate their account by purchasing a different subscription type, in which case a separate persona will be added to their account, while their Consumer persona will remain with status expired/cancelled.

The screenshots illustrate the following steps:

- Step 1: Log in and navigate to the account page.** The user logs in to the Lynda.com website and navigates to the 'Expired Account' section.
- Step 2: Select a subscription plan.** The user selects a subscription plan, such as 'Monthly Premium' or 'Yearly Premium'. A red arrow points to the 'Continue' button.
- Step 3: Enter billing information.** The user enters their billing details, including country, address, city, state, zip code, and email. A red arrow points to the 'submit order' button.

Fig 3.34 [Public Site] Reactivate Consumer Membership

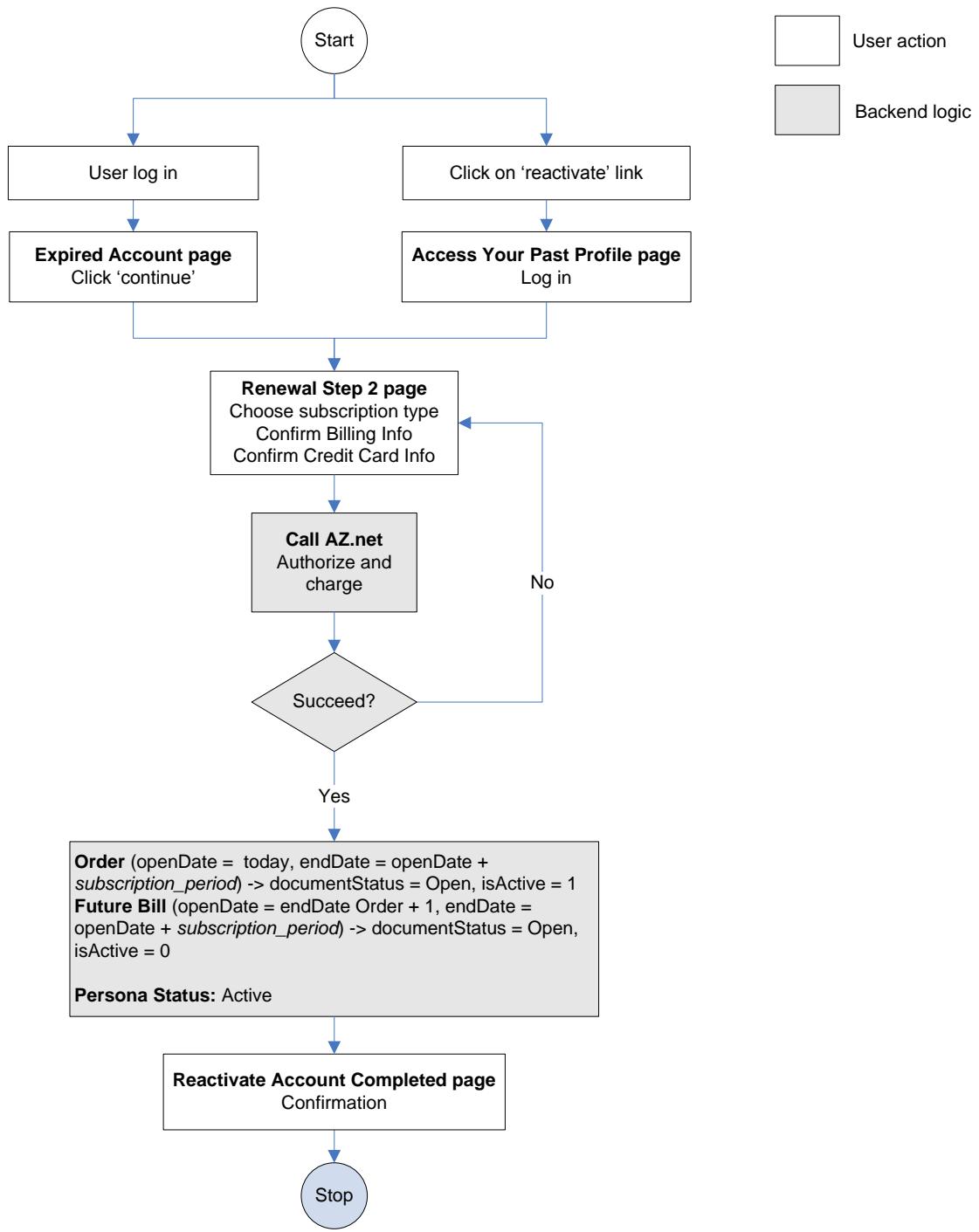


Fig 3.35 Reactivate Consumer Membership from Public Site

## 3.19 [Consumer] Reactivate Membership – Admin Site

This flow is followed by Customer Support representatives who reactivate a Consumer's subscription at their request, being able to choose among all 4 individual membership types. The Customer Support representative is given the possibility to reactivate the Consumer either as a regular member (paid membership) or as a complimentary member (free membership).

The figure consists of five screenshots illustrating the 'Reactivate Membership' process:

- Screenshot 1: Customer Details** (http://64.129.255.241/CustomerDetail/DisplayCustomer.aspx?pk=399089&pk1=1&pk2=0)
- Screenshot 2: Consumer Registration Confirmation** (http://64.129.255.241/C/Consumer/RegistrationConfirmation.aspx)
- Screenshot 3: Consumer Renewal Step 2** (http://64.129.255.241/C/Consumer/RenewalStep2.aspx)
- Screenshot 4: Reactivate** (http://64.129.255.241/C/Reactivate.aspx?pk=399089&pk1=1&pk2=1)
- Screenshot 5: Billing Information** (http://64.129.255.241/BillingInformation.aspx)

**Screenshot 1: Customer Details**

Customer Details page for Kelly Adams. It shows account information, a credit card section, and a table of recent orders.

Type	Number	Created Date	Product	Created By	Status	Last Updated	Updated By	Primary Document
Bill	4281546	2/14/2011 1:13:20 AM	OTL Standard Monthly	Billingglob	Cancelled	2/22/2011 4:03:05 PM	heather Canfield	No
Bill	4136802	1/14/2011 6:11:05 PM	OTL Standard Monthly	User	Paid	2/28/2011 3:04:02 PM	Jenna Landvogt	No
Order	4136801	1/14/2011 6:11:04 PM	OTL Standard Monthly	User	Cancelled	2/22/2011 4:03:05 PM	heather Canfield	Yes

**Screenshot 2: Consumer Registration Confirmation**

Confirmation page stating the account has been successfully reactivated.

**Screenshot 3: Consumer Renewal Step 2**

Subscription Renewal Step 2 page. It shows billing information and payment options.

**Screenshot 4: Reactivate**

Reactivate consumer account page. It asks to select the account type (Regular or Complimentary) and has a 'Continue' button.

**Screenshot 5: Billing Information**

Billing Information page for Kelly Adams. It includes fields for address, city, state, zip, phone, email, and PO number.

Fig 3.36 [Admin Site] Reactivate Consumer Membership

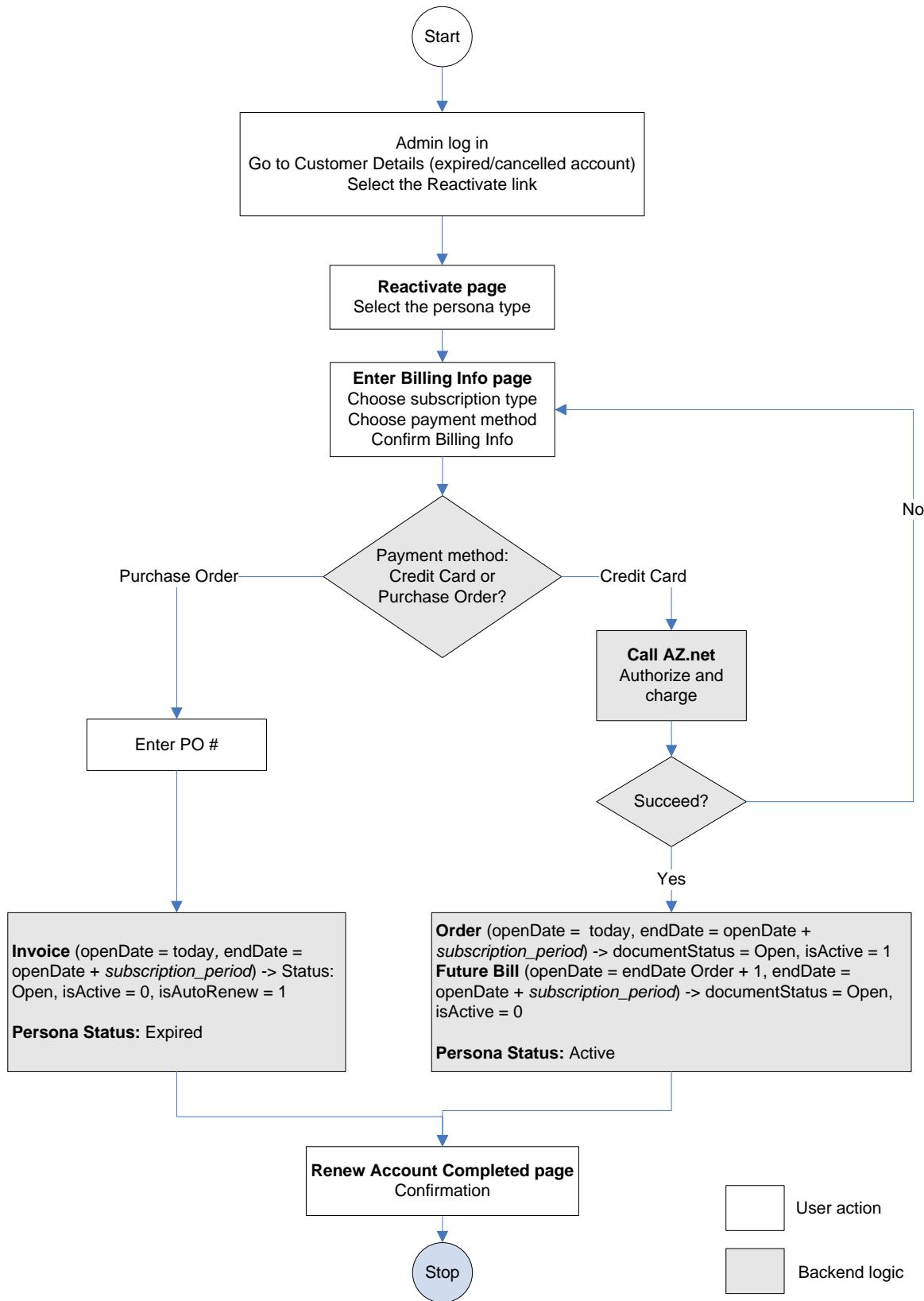


Fig 3.37 Reactivate Consumer Membership from Admin Site

# 4. lyndaPro

## Flows



- **Public site flows**
- **Admin site flows**

# 4.1 [lyndaPro Master Admin] Registration – Public Site

This flow is followed by new customers who want to purchase a lyndaPro subscription from the Public site.

**Step 1: Administrator account information**

Administrator's first name: John  
Administrator's last name: Doe  
Position/Title: Manager  
Department: Sales  
Company/Org. Name: Acme Corp  
Phone: (555) 123-4567  
Email: john.doe@acme.com  
Choose user name: johndoe  
Choose password: password123  
Password (confirm): password123  
Note: Your email address will be added to our email list. You may opt out at any time. Your personal information is safe, and will never be shared with any third party.

**Step 2: Enter number of licenses**

Number of licenses needed: 12

**Step 3: Select payment method**

Select Payment Type: Credit Card  
Select renewal option:  
 Renew your license on the expiration date. Your credit card will be charged. There will be no disruption of service during the renewal period. If you have trouble renewing, please call us at (800)333-1932.  
 Allow your license to expire on the expiration date. For uninterrupted access to the Online Training Library, you must renew your license prior to the expiration date by calling us at (800)333-1932.

**Step 4: Billing information**

Country: Romania  
First Name: John  
Last Name: Doe  
Company/Org. Name: Acme Corp  
Address: 123 Main Street  
City: Bucharest  
State/Province: Romania  
Zip/Postal Code: 02243  
Phone: 021-1234567  
Email: john.doe@acme.com (contacting contact)

**Step 5: Credit card information**

Credit Card Type: Visa  
Credit Card Number: 4111-1111-1111-1111  
Name on Card: John Doe  
Credit Card Security Code: 123  
Expiration Date: 08-August-2011  
I have read and agree to the Terms and Conditions.

**Step 6: Order confirmation**

Order # 5092363 | Invoice Date: 22 Aug 2011 | Product Description: lyndaPro membership | # User Licenses: 12 | Amount Per License: \$3,000.00 | Total Amount: \$3,600.00

**Step 7: Group setup**

You are now ready to set up your groups and add users. Once you have completed the set up, your users can begin learning using the lynda.com Online Training Library.

**Step 8: Sign up complete**

Thank you for signing up! Here's what happens next:

1. You will get a receipt; your receipt will be emailed to you with your user name and password.
2. Account access becomes active: Your user license are active immediately after step 8 step 9 step 10 instructions.
3. Get started: You will receive an email with step 8 step 9 step 10 instructions.
4. Invite your users: You will need to send your users a registration email and invite them to register with lynda.com. You can use the registration template or the registration template. A user name and password is required in order for your users to log in and access the Online Training Library.

Send email | Go to group setup | Go to group setup | Sign up complete | lyndaPro Admin Home

Fig 4.1 [Public Site] lyndaPro Master Admin Registration (without Group Setup)

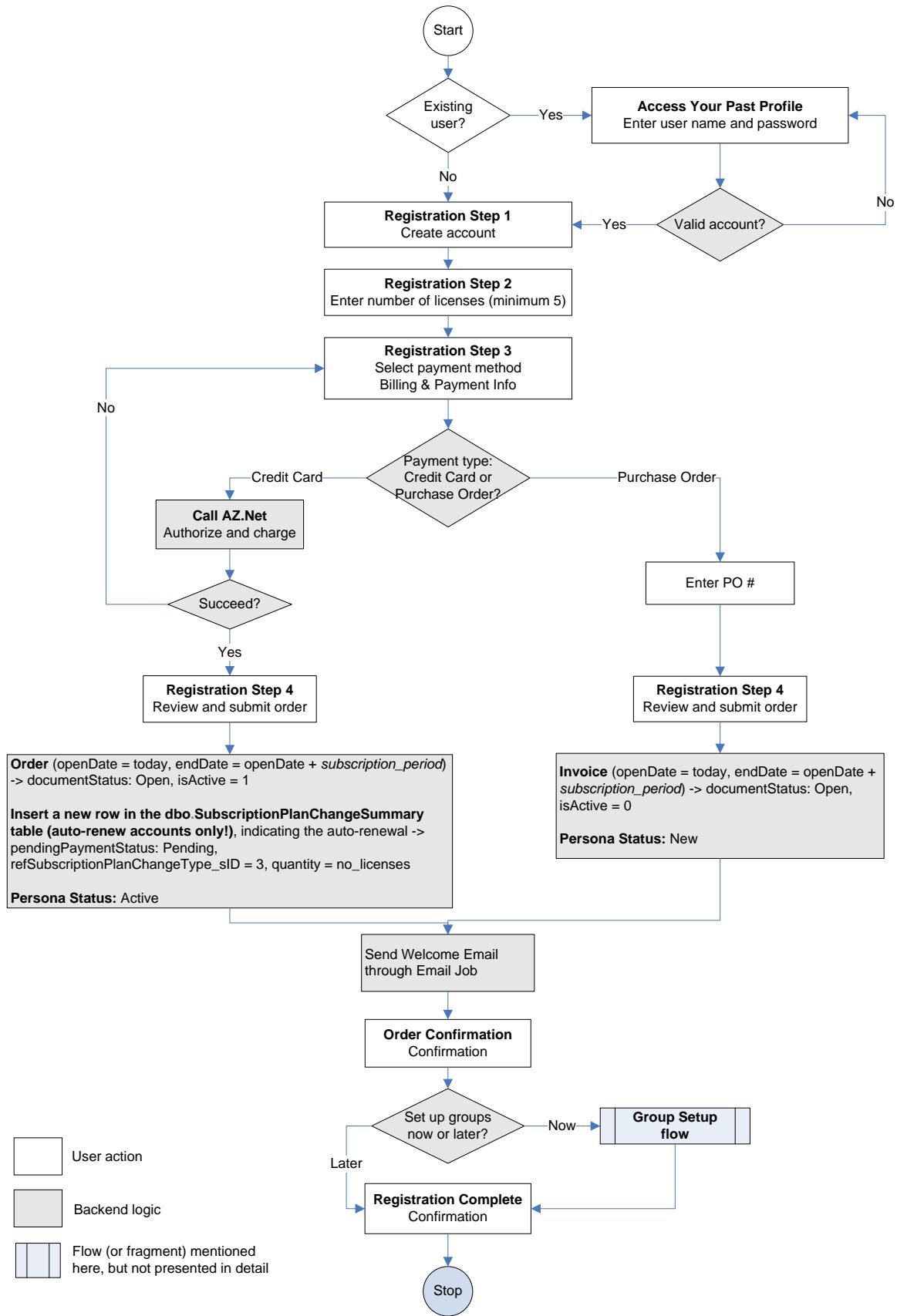


Fig 4.2 lyndaPro Master Admin Registration from Public Site (without Group Setup)

## Presenting separately the Group Setup flow:

**lyndaPro | Admin setup: Step 1 of 3 ...**

**Create your group**

Group Name: gr1  
Group Description:  
# of user licenses needed for Group: 3

**Required information**

Group	Description	# of User Licenses	Group Status
gr1		3	Active

**User License Summary**

	12
# User Licenses Purchased	12
# User Licenses Payment Received (Active)	12
# User Licenses Assigned to Active Groups	3
Total User Licenses Available	9

**What our customers are saying:**

I'm a new employee at a company with a subscription to lynda.com, and the training available on lynda.com has been invaluable in sharpening my skills and demystifying tools that I have only ever heard about.

**continue Add users**

**back Order confirmation**

**2 → 3**

**lyndaPro | Admin setup: Step 2 of 3 ...**

**Add users**

Manually input users one at a time.

Please enter the first name, last name and email address of each user that you would like to add to a group - followed by clicking the Add button. If you make a mistake, you may edit or delete the entry once it appears in the list below. Repeat the above process until you have added all of the users in your group.

Group Name: gr1  
First Name: Last Name: Email: **add a user**

**Upload user data using an excel spreadsheet**

Please download the **Group User List Template**. For the file to be read correctly, enter the group name in column A, first name in column B, the last name in column C and the email address in column D. When you have completed your group user list, browse for the file and click the Upload button.

Note: Uploading does not work with Excel 2007 files. If you use Excel 2007, please save the file as an Excel 2003 file with .xls extension.

**continue**

**back**

**lyndaPro Admin setup: Step 3 of 3 ...**

**Create sub-administrator**

Your transaction is secure

**What our customers are saying:**

I'm a new employee at a company with a subscription to lynda.com, and the training available on lynda.com has been invaluable in sharpening my skills and demystifying tools that I have only ever heard about.

**Select from Group**

Group Name: User Full Name: Select one... Select one... Search by Name: Search by Name

**Select group(s) to be managed by this sub-administrator.**

**Available Groups** gr1 **Groups Managed**

**Select group/user management permission(s) to grant to this sub-administrator.**

**Group Management:**  Activate/Deactivate Group  Delete Group  View Reports

**User Management:**  Activate/Deactivate User  Move User  Add User  Delete User  Edit User  Send Email

Note: The Send Email permission will automatically get selected if you choose one of the following: Activate/Deactivate Group, Activate/Deactivate User, or Add User. The Activate/Deactivate User permission will automatically get selected if you choose Activate/Deactivate Group.

**submit**

**Sub-administrators list**

Choose between the two display options available: **Display by Sub-Administrator** (shows a table containing all available sub-administrators and their assigned groups/permissions) and **Display by Group** (shows a table containing all available groups, with information on the permissions granted for each of them).

**Display by Sub-Administrator** **Display by Group**

**continue**

**Sign up complete**

Fig 4.3 [Public Site] lyndaPro Master Admin Registration – Group Setup

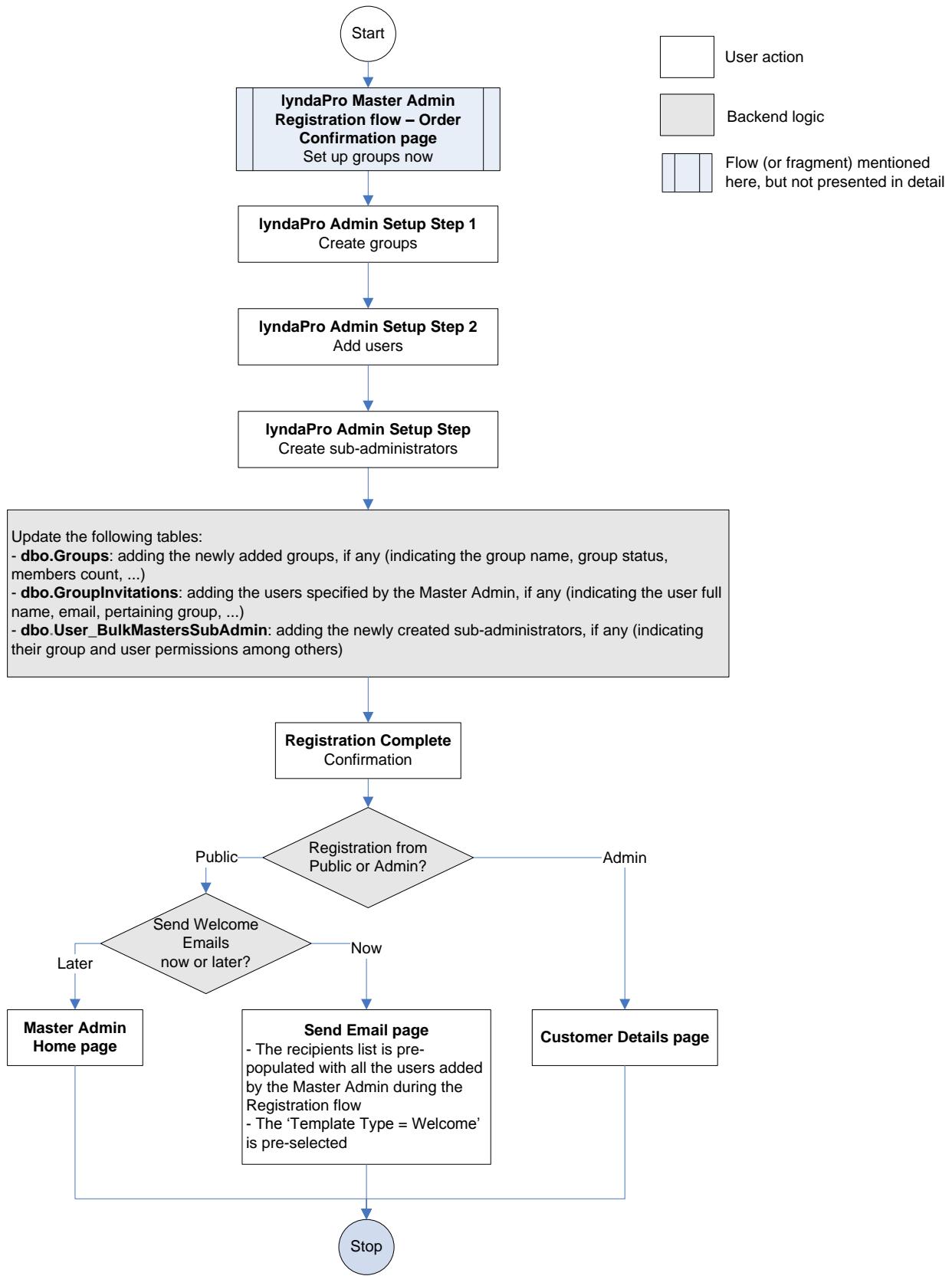


Fig 4.4 lyndaPro Master Admin Registration – Group Setup

## 4.2 [lyndaPro Master Admin] Registration – Admin Site

### Site

This flow is followed by Customer Support representatives who purchase a lyndaPro subscription from the Admin site at a customer's request.

**lyndaPro Admin Registration Step 1 -** lynda.com/admin

**lyndaPro Admin Registration Step 2 -** lynda.com/admin

**lyndaPro Admin Registration Step 3 -** lynda.com/admin

**lyndaPro Admin Registration: Step 4 of 4 - Review and submit order**

**lyndaPro Admin Registration: Order confirmation**

**lyndaPro Admin Setup: Sign up complete**

Fig 4.5 [Admin Site] lyndaPro Master Admin Registration (without Group Setup)

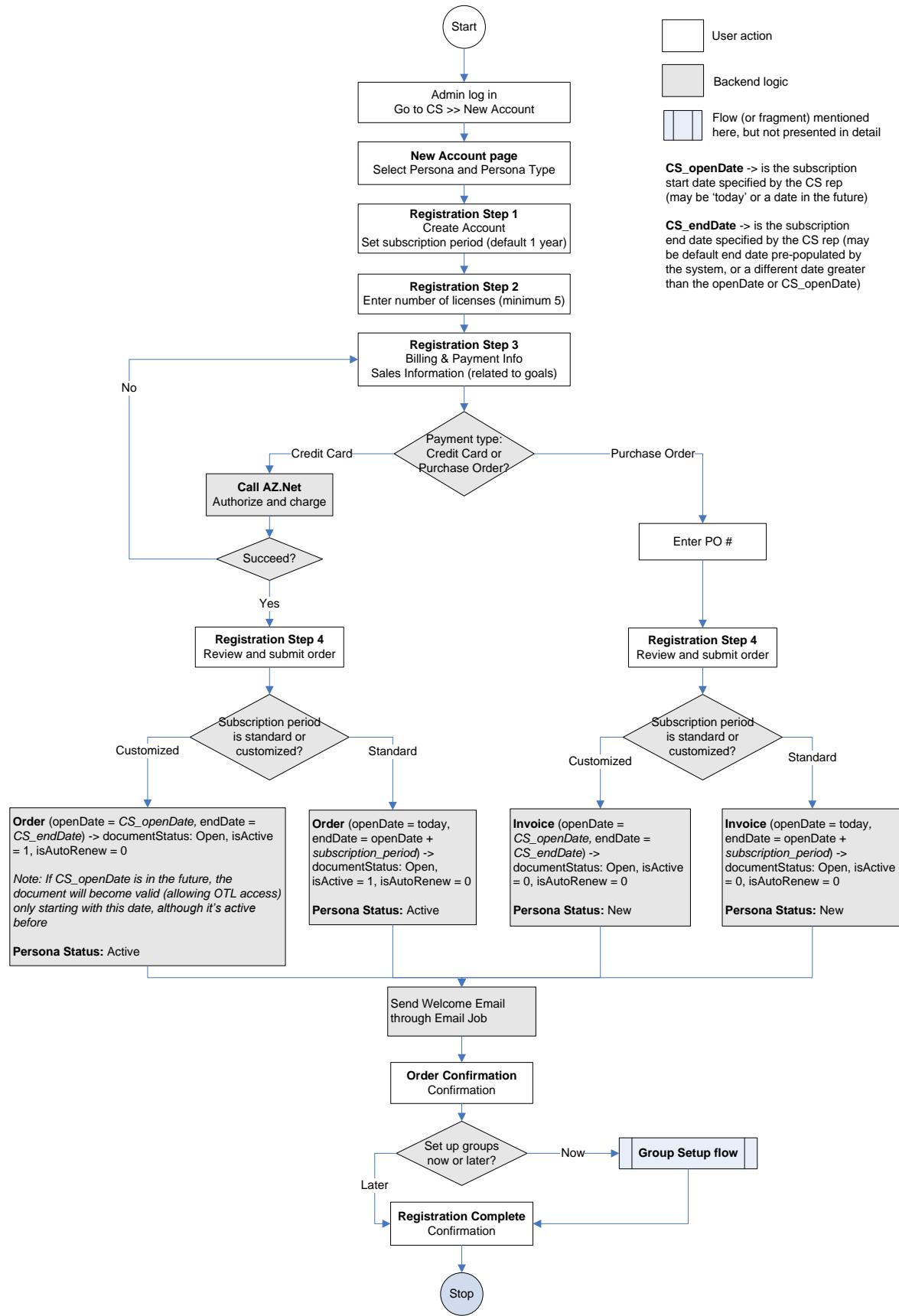


Fig 4.6 lyndaPro Master Admin Registration from Admin Site

## 4.3 [lyndaPro Master Admin] Complimentary Account – Admin Site

This flow is followed by Customer Support representatives who create a complimentary (free) account for a new lyndaPro Master Admin. This type of accounts can be created from the Admin site only. The flow is similar to the one corresponding for regular accounts, with the difference that the amount paid by the customer (and implicitly written on the document) is \$0. Also, this type of accounts cannot be set to auto-renew.

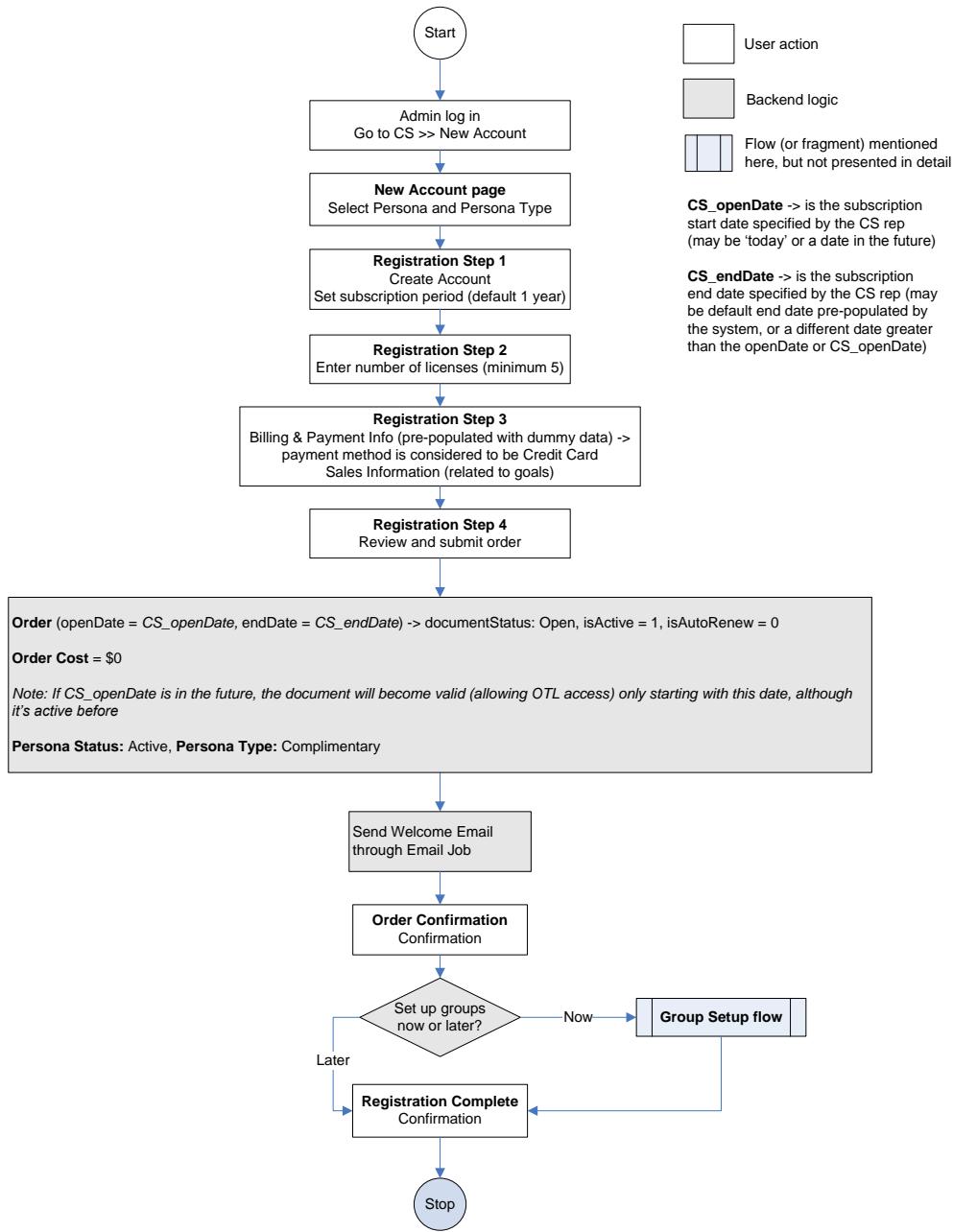


Fig 4.7 lyndaPro Master Admin Complimentary Account from Admin Site

## 4.4 [lyndaPro Master Admin] Comp Extension – Admin Site

This flow is followed by Customer Support representatives who decide to grant a given lyndaPro Master Admin a free extension of the current subscription period.

Note: For the visual flow, please see the [Consumer Comp Extension](#), which is similar.

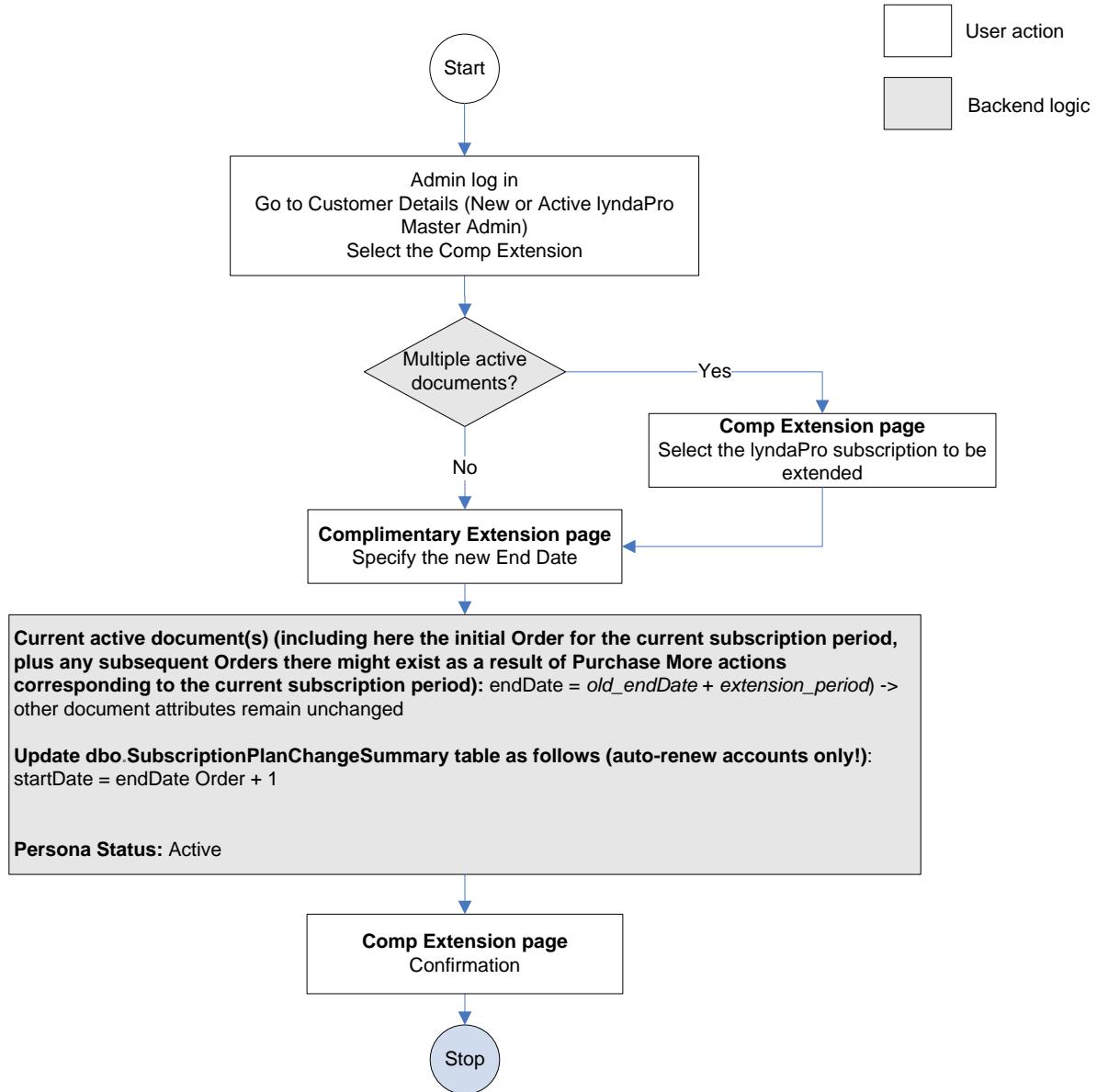


Fig 4.8 lyndaPro Master Admin Comp Extension from Admin Site

## **4.5 [lyndaPro Master Admin]Grant OTL Access (Activate Invoice) – Admin Site**

This flow is followed by Customer Support representatives who decide to grant OTL access to lyndaPro Master Admins having an active (unpaid, or partially paid) Invoice (indicating that the selected payment method was Purchase Order). This means that the lyndaPro Master Admins, and implicitly their associated lyndaPro Users, will be able to access their account prior to payment.

Note: For the step-by-step flow presented both in images and as a diagram, please see the [Grant OTL Access \(Activate Invoice\)](#) corresponding to Consumers, which is similar.

## **4.6 [lyndaPro Master Admin] Apply Payment to Invoice – Admin Site**

This flow is followed by Customer Support representatives who confirm partial or full payment of unpaid or partially paid Invoices coming from a lyndaPro Master Admin.

Note: For the visual flow, please see the [Apply Payment to Invoice](#) corresponding to Consumers, which is similar.

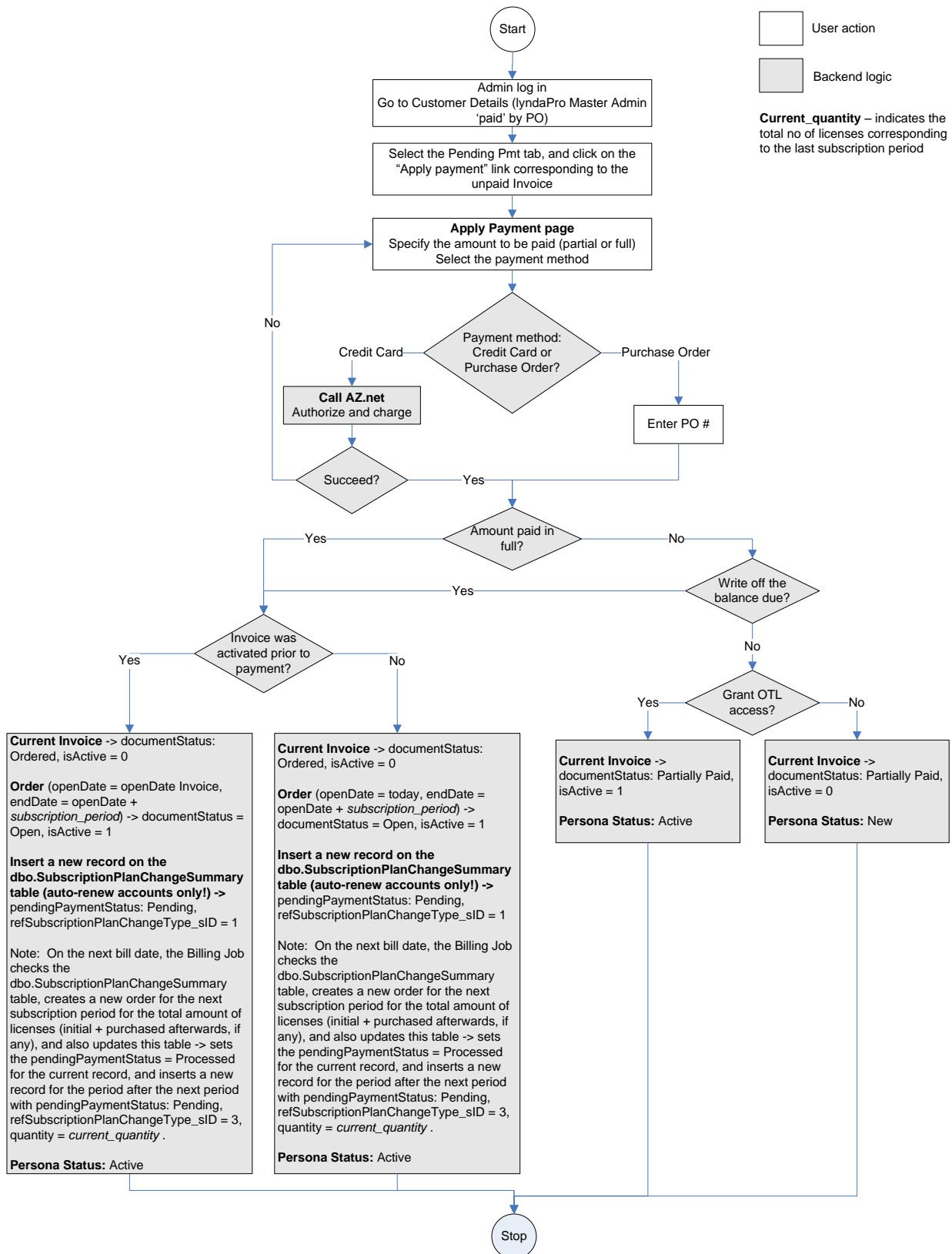


Fig 4.9 Apply Payment to Invoice from Admin Site

# 4.7 [lyndaPro Master Admin] Purchase More – Public Site

This flow is followed by active lyndaPro Master Admins who wish to purchase extra licenses from the Public site.

In this case, the validity period of the extra licenses (and implicitly their price) is given by the end date of the current subscription period -> in other words, extra licenses cannot be bought for a period shorter or longer than the current subscription period. In case of auto-renew accounts, the initial subscription together with any further 'purchase more' action are listed in the dbo.SubscriptionPlanChangeSummary table, and on each billing date the Billing Job checks this table and computes the total number of licenses that will be charged for the next subscription period (the extra licenses are taken into consideration for the next subscription period). Just as a reminder, we don't use Future Documents anymore in case of lyndaPro subscriptions.

Invoices are automatically activated by the system in this case, ignoring the fact that payment was not received at that given moment.

**Step 1: Purchase Licenses**

Number of licenses: 10

**Step 2: Select payment method**

Select payment type: Purchase Order

**Step 3: Review and purchase order**

Product Description: lyndaPro membership  
# User Licenses: 10  
Amount Per License: \$283.36  
Total Amount: \$2,833.56

**Step 4: Order confirmation**

Your order has been successfully processed!

**Step 5: Review and purchase order**

2 -> 3

Fig 4.10 [Public Site] lyndaPro Master Admin Purchase More

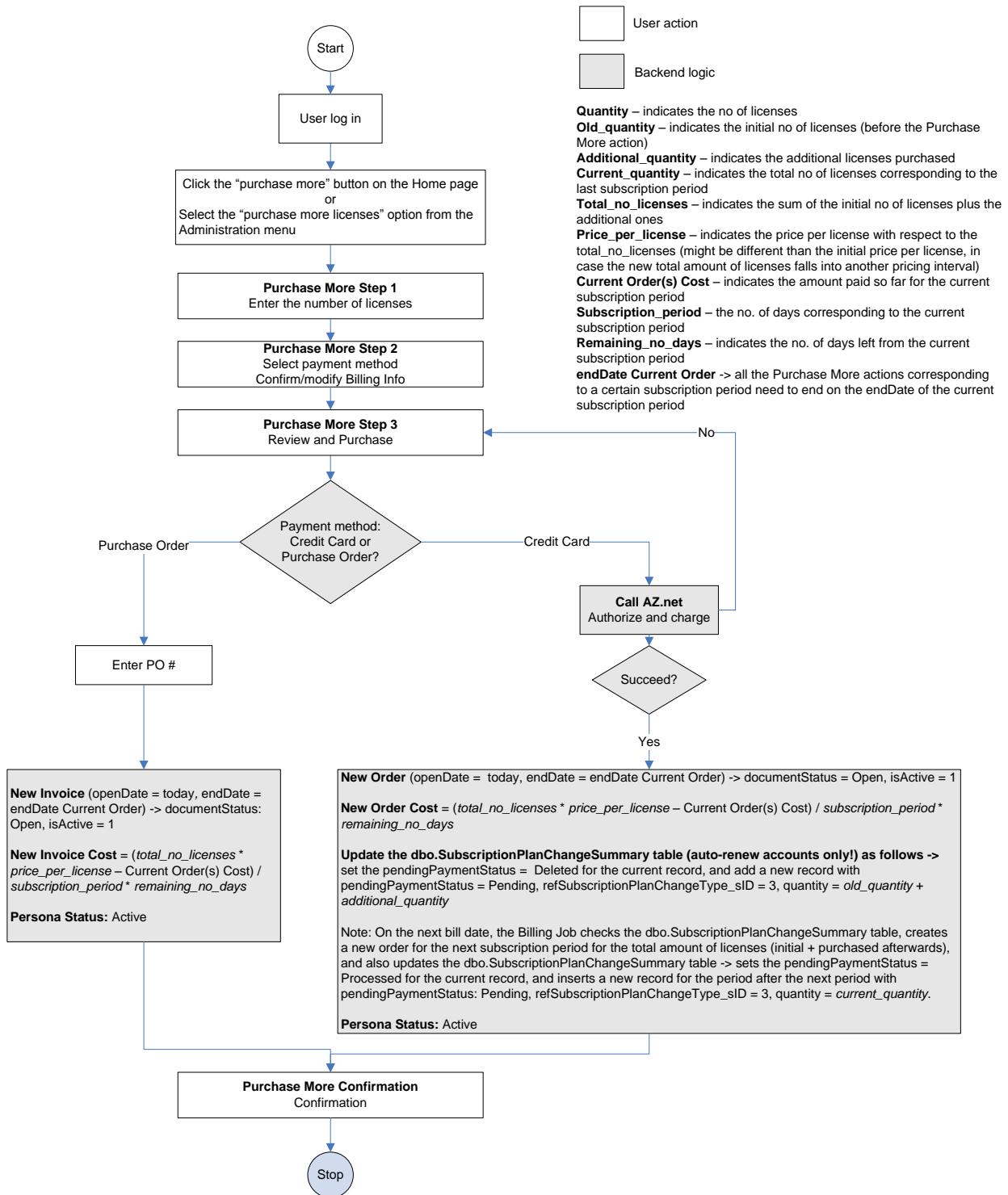


Fig 4.11 lyndaPro Master Admin Purchase More from Public Site

## 4.8 [lyndaPro Master Admin] Purchase More (New Quote) – Admin Site

This flow is followed by Customer Support representatives who purchase extra licenses at a lyndaPro Master Admin's request form the Admin site.

Fig 4.12 [Admin Site] lyndaPro Master Admin Purchase More (Create Quote only, without the Invoice Quote flow)

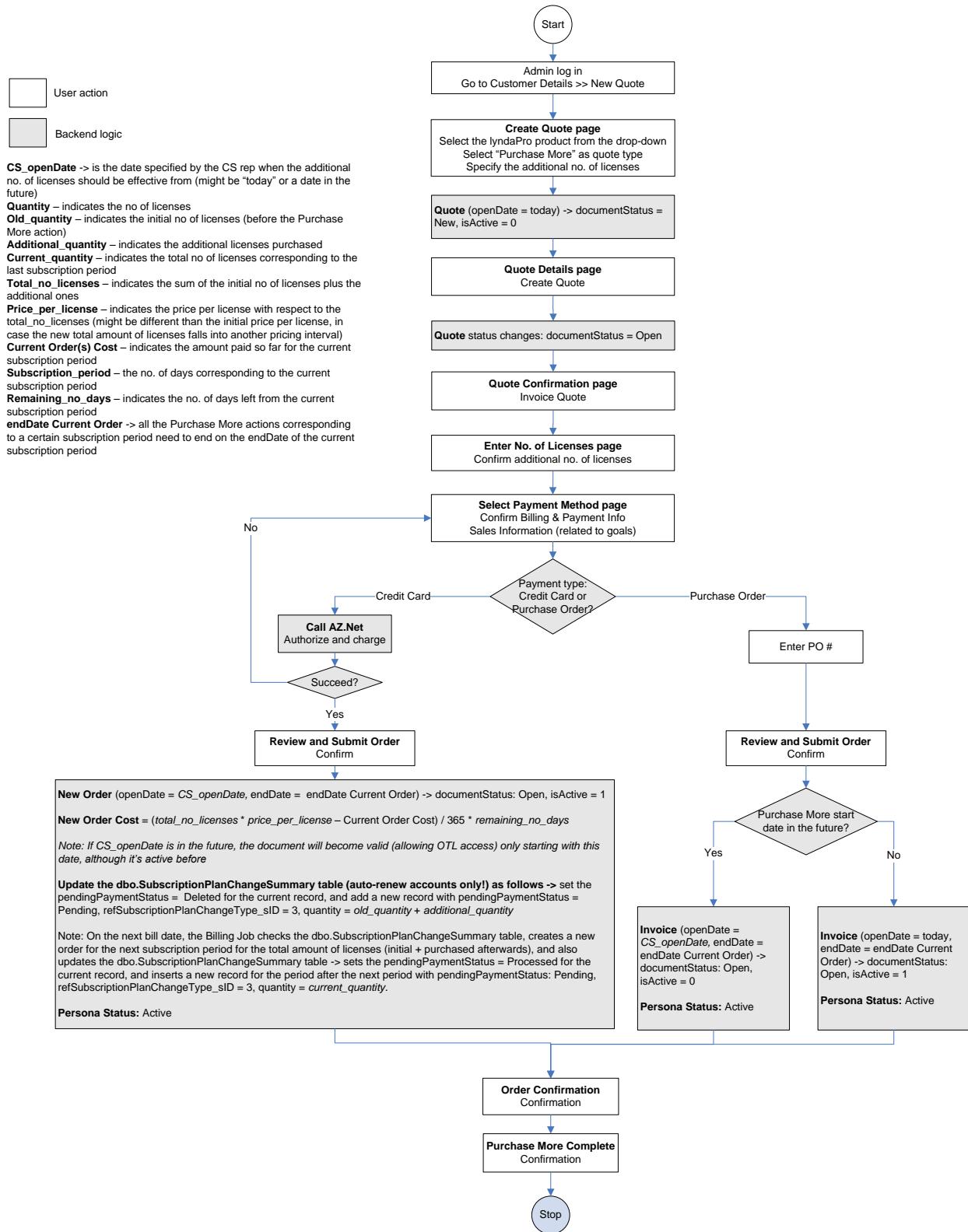


Fig 4.13 lyndaPro Master Admin Purchase More (New Quote) from Admin Site

# 4.9 [lyndaPro Master Admin] Renew Membership – Public Site

This flow is followed by active lyndaPro Master Admins with the following statute: canceled lyndaPro Master Admins who have not ended their availability period yet (End Date is in the future) who want to renew their subscription, active not auto-renew lyndaPro Master Admins who want to renew their subscription, or active auto-renew lyndaPro Master Admins who want to pay in advance their next recurrent bill. In all cases the lyndaPro Master Admin has the opportunity of purchasing a different number of licenses than the one corresponding to the current subscription period.

**Step 1: EnterLicenses.aspx**

The page at [http://demo.lynda.com/lyndaPro/renew/Step1of1\\_EnterLicenses.aspx](http://demo.lynda.com/lyndaPro/renew/Step1of1_EnterLicenses.aspx) says:

**Warning:** Your user licenses are not due to expire for another 384 days. If you renew your licenses today, the start date of your new licenses will be 22 Aug 2012. To continue and renew your licenses, click OK.

**Step 2: Step1of1\_EnterLicenses.aspx**

lyndaPro | Subscription renewal Step 1 of 3

Enter number of licenses needed

Number of licenses: 12

Enter promotional code

If you have a promotional code, enter it to receive a discount on your lyndaPro subscription. Code:

**Step 3: Step1of1\_SelectPaymentMethod.aspx**

lyndaPro | Subscription renewal Step 2 of 3

lyndaPro subscription renewal: Step 2 of 3

Product Description	# User Licenses	Amount Per License	Total Amount	Effective Date
lyndaPro membership	16	\$325.00	\$5,200.00	22 Aug 2012

Select payment type

Select Payment Type: CreditCard

Select renewal option

Please select one of the following options:

- Renew your licenses on the expiration date. Your credit card will be charged. There will be no disruption of your service, and you and your users will enjoy uninterrupted access to the Online Training Library®.
- Allow your licenses to expire on the expiration date. For uninterrupted access to the Online Training Library®, you must renew your licenses prior to the expiration date online by calling us at (888)335-9932.

**Step 4: Step1of1\_BillingInformation.aspx**

lyndaPro | Subscription renewal Step 3 of 3

lyndaPro subscription renewal: Step 3 of 3

Billing information

Country: Romania  
First Name: Ada  
Last Name: M  
Company/Org. Name: sv  
Address: ro  
Apartment:  
City: q  
State/Province:  
Zip/Postal Code:  
Phone: 12345  
Email: amnon10@einstein.rs \* (accounting contact)

Note: To help protect our credit card, lynda.com has installed AVS (Address Verification System). Your billing address must match the shipping address. If you have trouble, please call us toll-free at (888)335-9932, to complete your order by phone. We'll be happy to assist you.

\* Required information

**Step 5: Step1of1\_CreditCardInformation.aspx**

lyndaPro | Subscription renewal Step 4 of 4

Credit card information

Amount: \$5,200.00
Credit Card Type: Visa
Credit Card Number: ****1111 * no dashes and no spaces
Name on Card: ada * more info
Credit Card Security Code: * more info
Expiration Date: 08 / 2011

I have read and agree to the Terms and Conditions.

**Step 6: RenewalComplete.aspx**

lyndaPro | Renewal complete

Your transaction is secure

What our customers are saying:

I'm a new employee at a company with a technology budget available, and the training available on lynda.com has been invaluable in sharpening my skills and demystifying tools that I have only ever heard about.

continue lyndaPro home

You have completed all the steps needed to renew your licenses.

1) You have renewed 16 user licenses which will give simultaneous access to the Online Training Library® for 16 users.  
2) Your user licenses are effective through 22 Aug 2012.

Your order has been successfully processed!

Billing Information

Sv  
Ro  
Cl., Romania.  
12345

Order Information

Order #	Invoice Date	Product Description	# User Licences	Amount Per License	Total Amount
5095549	23 Aug 2011	lyndaPro membership	16	\$325.00	\$5,200.00

Payment Information

Payment Type	Name on Card	Visa #	Amount
Visa	ada	*****1111	\$5,200.00

Your transaction is secure

What our customers are saying:

I'm a new employee at a company with a technology budget available, and the training available on lynda.com has been invaluable in sharpening my skills and demystifying tools that I have only ever heard about.

print invoice

Order Confirmation

Fig 4.14 [Public Site] lyndaPro Master Admin Renewal

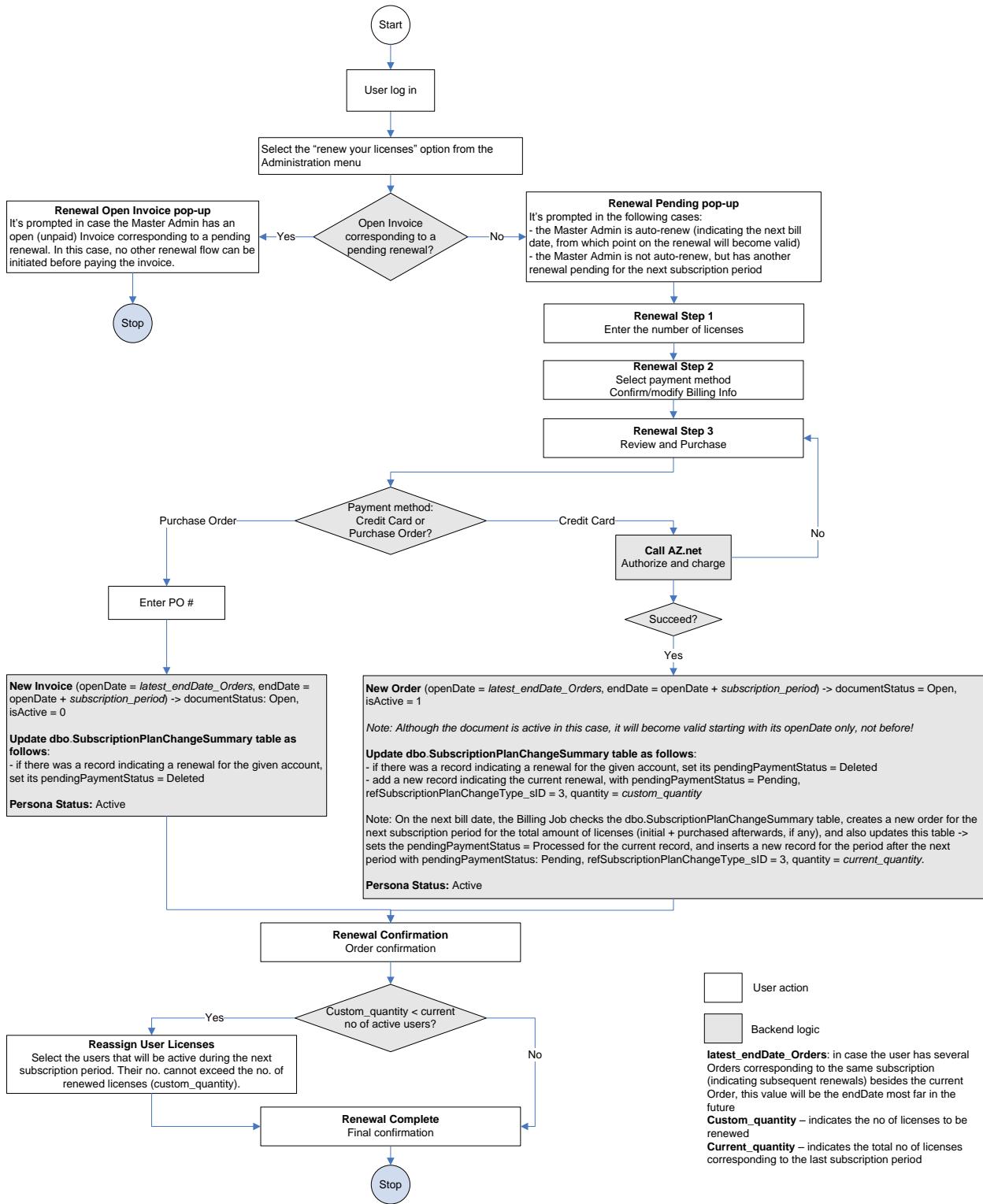


Fig 4.15 lyndaPro Master Admin Renewal from Public Site

# 4.10 [lyndaPro Master Admin] Renew Membership (New Quote) – Admin Site

This flow is followed by Customer Support representatives who renew the account of a lyndaPro Master Admin at their request, having the opportunity of purchasing a different number of licenses than the one corresponding to the current subscription period.

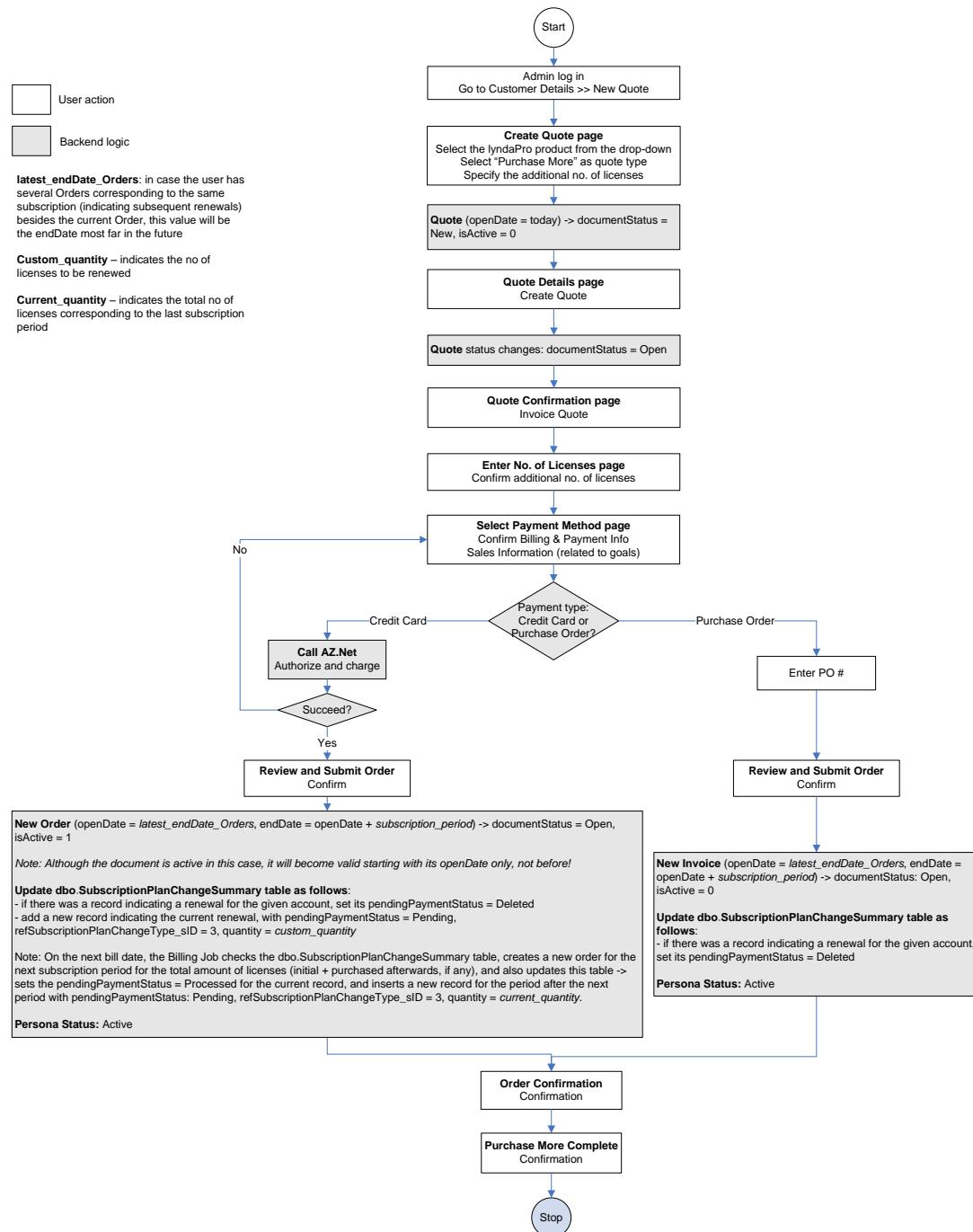


Fig 4.16 lyndaPro Master Admin Renewal (New Quote) from Admin Site

## 4.11 [lyndaPro Master Admin] Cancel Membership – Public Site

Note: This flow is blocked by [bug #8834](#) ([lyndaPro] "Cancel your subscription" link doesn't appear on Public site for auto-renew lyndaPro Master Admins)

## 4.12 [lyndaPro Master Admin] Cancel Membership (Cancel Order) – Admin Site

This flow is followed by Customer Support representatives who cancel a lyndaPro Master Admin's subscription due to abusive behavior, or at the customer's request. Cancel may or may not be accompanied by a refund (partial or full), and the Customer Support representative is given the possibility to leave the OTL access until the current document expires, or to remove it from the given customer (in which case the Master Admin, and implicitly his/her associated lyndaPro Users, will no longer be able to access their account from the moment of cancellation).

Using this same flow, the Customer Support representative can just offer a refund to the customer (partial or full) without cancelling their account. Or it's possible to set a customer as abusive, in which case the current documents remain untouched, but the user is prevented from logging into the account.

Note: For the visual flow, please check the [Cancel Consumer Membership \(Cancel Order\)](#), which is similar.

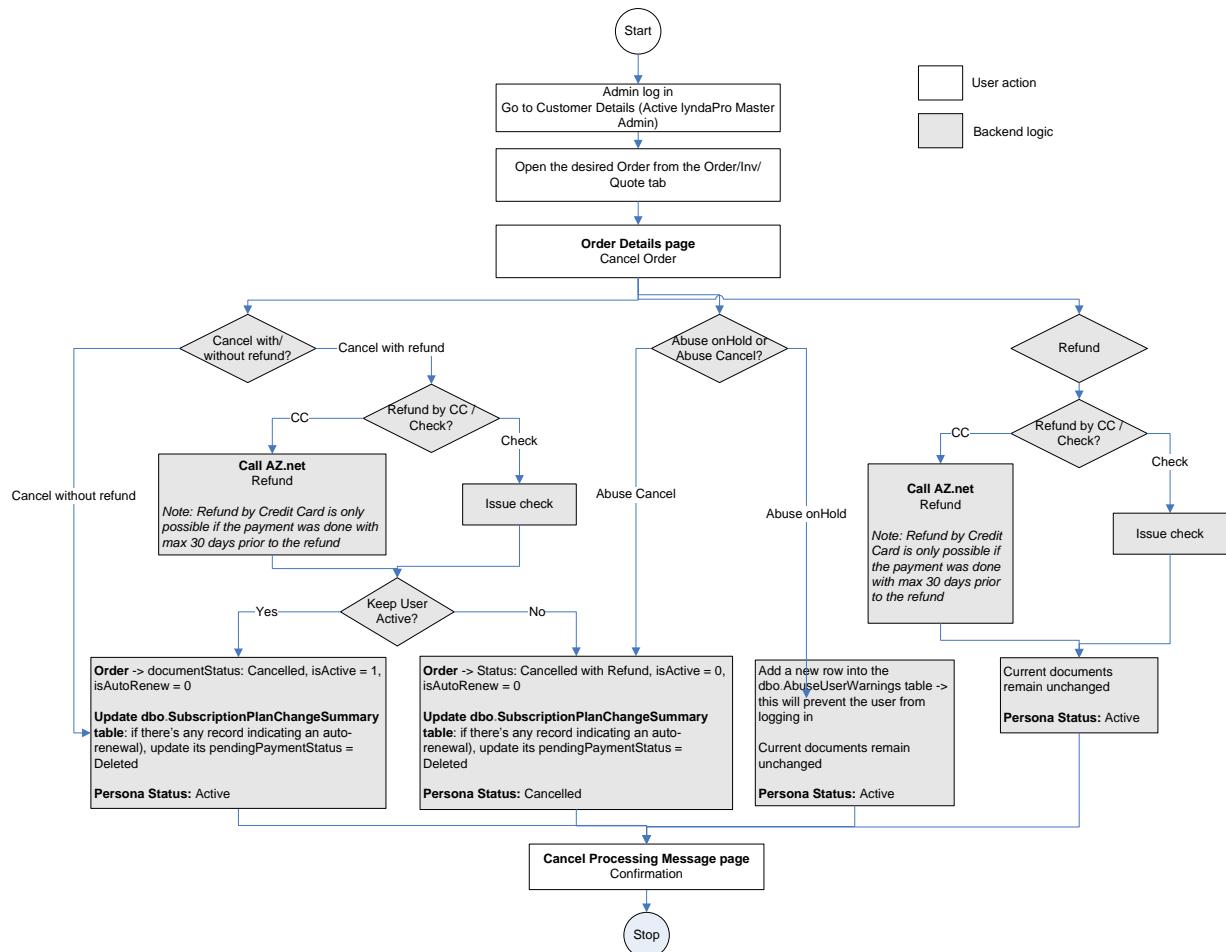


Fig 4.19 Cancel lyndaPro Master Admin Membership (Cancel Order) from Admin Site

## **4.13 [lyndaPro Master Admin] Cancel Membership (Cancel Invoice) – Admin Site**

This flow is followed by Customer Support representatives who cancel a lyndaPro Master Admin's subscription due to failure in applying payment to purchase orders in due time, abusive behavior, or at the customer's request. Cancel may or may not be accompanied by a refund (partial or full), and the Customer Support representative is given the possibility to leave the OTL access (in case the invoice was prior activated) until the current document expires, or to remove it from the given customer (in which case the Master Admin, and implicitly his/her associated lyndaPro Users, will no longer be able to access their account from the moment of cancellation).

Using this same flow, the Customer Support representative can just offer a refund to the customer (partial or full) without cancelling their account -> the refund cannot exceed the amount paid by the customer.

Note: For the step-by-step flow presented both in images and as a diagram, please see the [Cancel Consumer Membership \(Cancel Invoice\)](#), which is similar.

# 4.14 [lyndaPro Master Admin] Reactivate Membership – Public Site

This flow is followed by expired/cancelled lyndaPro Master Admins who wish to reactivate their lyndaPro membership.

The screenshots illustrate the following steps:

- Step 1: Expired account** (Screenshot 1) - Shows the account has expired. Step 1 is highlighted with a red arrow pointing down.
- Step 2: Renewal complete** (Screenshot 2) - Shows the renewal is complete. Step 2 is highlighted with a red arrow pointing up.
- Step 3: Enter number of licenses needed** (Screenshot 3) - Shows entering the number of licenses. Step 3 is highlighted with a red arrow pointing down.
- Step 4: Select payment method** (Screenshot 4) - Shows selecting a payment method. Step 4 is highlighted with a red arrow pointing up.
- Step 5: Payment confirmation** (Screenshot 5) - Shows the payment has been successfully processed. Step 5 is highlighted with a red arrow pointing up.
- Step 6: Review and renew** (Screenshot 6) - Shows the final review step before renewal. Step 6 is highlighted with a red arrow pointing up.

**Screenshot 1: lyndaPro | Expired account**

lyndaPro home > expired or canceled account

Expired account

Your subscription to the Multi-User Online Training Library Program has expired. To reactivate your organization's account in three easy steps, click Continue. If you wish to signup for a consumer account, click here.

**Screenshot 2: lyndaPro | Renewal complete**

lyndaPro home > renewal complete

lyndaPro renewal complete

Your transaction is secure

You have completed all the steps needed to renew your licenses

1) You have renewed 5 user licenses which will give simultaneous access to the Online Training Library® for 5 users.  
2) Your user licenses are effective through 23 Aug 2012.

**Screenshot 3: lyndaPro | Step 1 of 3**

lyndaPro licenses renewal: Step 1 of 3

Enter number of licenses needed

Number of licenses: 5

Enter promotional code

If you have a promotional code, enter it to receive a discount on your lyndaPro subscription. Code:

calculate

continue

Enter billing information

**Screenshot 4: lyndaPro | Step 2 of 3**

lyndaPro subscription renewal: Step 2 of 3

Product Description	# User Licenses	Amount Per License	Total Amount	EDIT
lyndaPro membership	5	\$350.00	\$1,750.00	EDIT

Select payment type

Select Payment Type: Credit Card

Select renewal option

Please select one of the following options:

- Renew your licenses on the expiration date. Your credit card will be charged. There will be no disruption of your service, and you and your users will enjoy uninterrupted access to the Online Training Library®.
- Allow your licenses to expire on the expiration date. For uninterrupted access to the Online Training Library®, you must renew your licenses prior to the expiration date online by calling us at (888)335-9632.

Billing information

Country: United States  
First Name: Carey  
Last Name: Holden  
Company/Org. Name: EDMC  
Address: 210 6th Avenue, 33rd Floor  
Apt/Suite:  
City: Pittsburgh  
State: Pennsylvania  
Zip: 15222  
Phone: 412-995-7649  
Email: cholden@edmc.edu (accounting contact)

Note: To help protect your credit card, lynda.com has initiated AVS (Address Verification System). Your billing address must match the credit card billing address. If you have trouble, please call us toll-free at (888) 335-9632, to complete your order by phone. We will be happy to assist you.

\* Required information

Credit card information

Amount: \$1,750.00 (billed annually at your signup date until you cancel)  
Credit Card Type: Visa  
Credit Card Number: \* no dashes and no spaces  
Name on Card: \*  
Credit Card Security Code: \* more info  
Expiration Date: 08-August / 2011

I have read and agree to the Terms and Conditions.

Enter number of licenses

Review and purchase

**Screenshot 5: lyndaPro | OrderConfirmation.aspx**

lyndaPro home > renew order confirmation

Your order has been successfully processed!

Billing Information

EDMC  
210 6th Avenue, 33rd Floor  
Pittsburgh, Pennsylvania, 15222  
tel: 412-995-7649

Order Information

Order #	Invoice Date	Product Description	# User Licences	Amount Per License	Total Amount
5095774	23 Aug 2011	lyndaPro membership	5	\$350.00	\$1,750.00

Payment Information

Payment Type	Name on Card	Visa #	Amount
Visa	ada	*****1111	\$1,750.00

continue

Renewal complete

**Screenshot 6: lyndaPro | Step 3 of 3**

lyndaPro home > renewal step 3 of 3

lyndaPro subscription renewal: Step 3 of 3

Your new user licenses will be active the day after your current licenses expire.

Order

Product Description	# User Licences	Amount Per License	Total Amount	EDIT
lyndaPro membership	5	\$350.00	\$1,750.00	EDIT

Payment

Your credit card will be charged when you submit your order. Your payment of \$1,750.00 will give access to the lynda.com Online Training Library® for 5 users until 22 Aug 2013. Your subscription will be automatically renewed and your credit card charged until you cancel.

Payment Type	Name on Card	Visa #	Amount
Visa	ada	*****1111	\$1,750.00

purchase

Order Confirmation

Fig 4.20 [Public Site] Reactivate lyndaPro Master Admin Membership

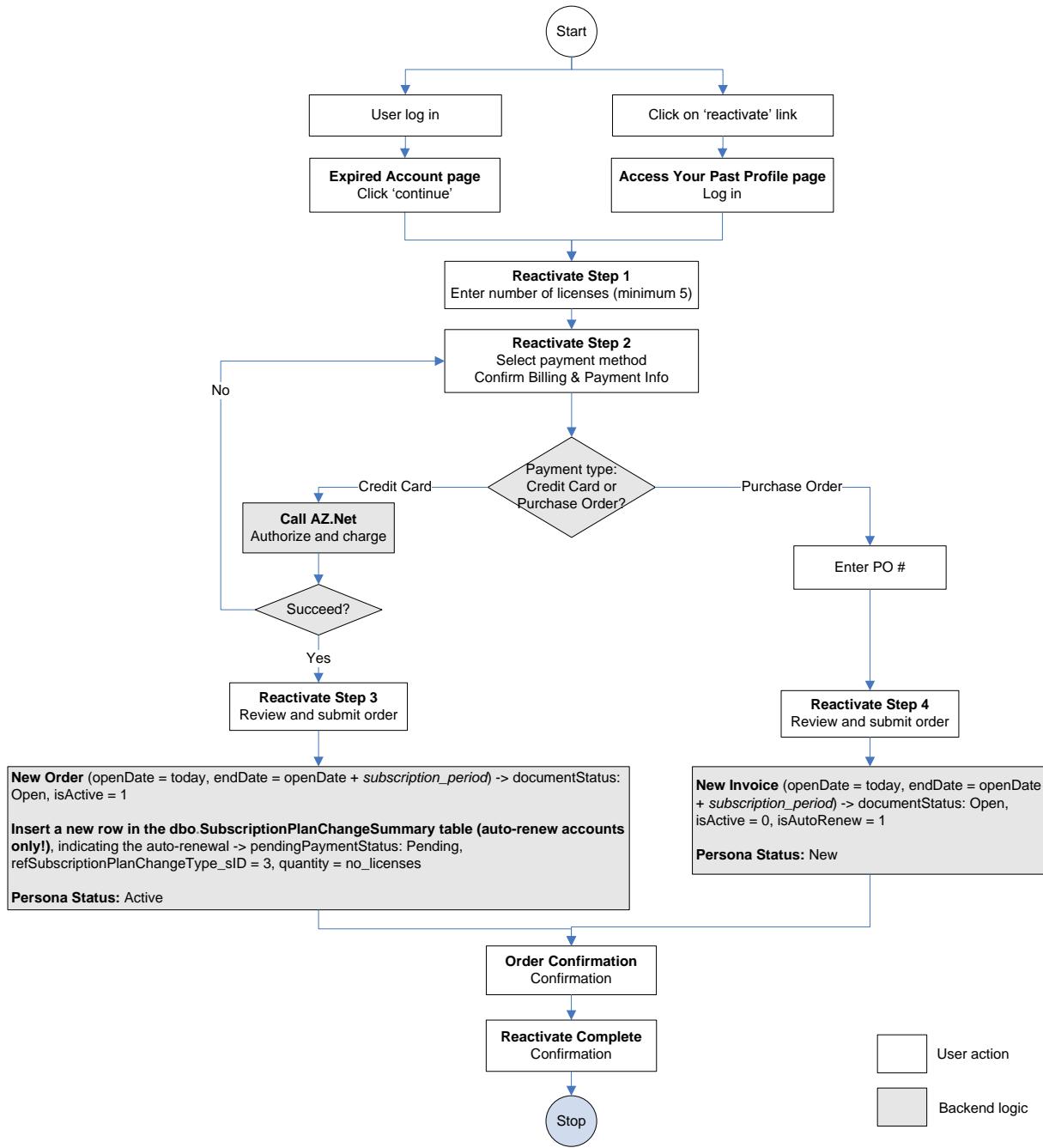


Fig 4.21 Reactivate lyndaPro Master Admin Membership from Public Site

# 4.15 [lyndaPro Master Admin] Reactivate Membership – Admin Site

This flow is followed by Customer Support representatives who reactivate a lyndaPro Master Admin's subscription at their request, either as a regular member (paid membership) or as a complimentary member (free membership).

The screenshots illustrate the following steps:

- Step 1: Select Account Type** (Screenshot 1)
  - Select account type: Regular (radio button selected).
  - Access granted: Start Date (mm/dd/yyyy): 01/29/2011; End Date (mm/dd/yyyy): 08/29/2012.
  - Continue button.
- Step 2: Enter Number of Licenses** (Screenshot 2)
  - Enter # of Licenses Needed: 10.
  - Enter promotional code: None.
  - Discount Reason: Select one: (Required when promotional code used).
  - Access Granted: 8/29/2011 - 8/1/2012; #Days: 338.
  - Product Description: lyndaPro membership; # User Licenses: 10; Amount Per License: \$300.14; Total Amount: \$3,001.37.
  - Previous: Reactivate account; Next: Select Payment Method.
- Step 3: Select Payment Method** (Screenshot 3)
  - Select Payment Type: Credit Card.
  - Billing Information: Country: Romania; First Name: ada; Last Name: m; Company/Org Name: ; Address: ; Apt/Unit: ; City: cluj; State/Province: ; Zip/Postal Code: ; Phone: 12345.
  - Credit Card Information: Credit Card Type: Visa; Credit Card Number: 4111111111111111; Name on Card: ada; Credit Card Security Code: 123; Expiration Date: 08/2011.
  - Sales Information: Rep1: Ben Miller; Market Segment: Corporate; Rep1 type: TSA; CV %: 100; NCV %: 100; Rep2: Ben Miller; Rep2 Market Segment: Corporate; Rep2 type: TSA; Operation Type: Reactivate/Renewal; Deal Type: Non-mutual year deal; Note: .
  - Previous: Enter # of User Licenses; Continue button.
- Step 4: Order Confirmation** (Screenshot 4)
  - LyndaPro Setup: Reactivation Complete.
  - lyndaPro Subscription Reactivation: Order Confirmation.
  - Billing Information: To: Cluj, Romania, 12345.
  - Order Information: Order #: 3113384 | Incident Date: 29-Aug-2011 | Product Description: lyndaPro | # User Licenses: 10 | Amount Per License: \$300.14 | Total Amount: \$3,001.37.
  - Payment Information: Payment Type: Visa; Name on Card: ada; Visa #: \*\*\*\*\*1111; Amount: \$3,001.37.
  - Group Setup: You are now ready to setup your groups and add users. Once you have completed the setup, your users can begin learning using the lynda.com Online Training Library.
  - Next: Order Confirmation.
- Step 5: Order Confirmation** (Screenshot 5)
  - LyndaPro Subscription Reactivation: 3 of 3 - Review and Submit Order.
  - Your subscription will be active immediately after your purchase.
  - Order: Product Description: lyndaPro membership; # User Licenses: 10; Amount Per License: \$300.14; Total Amount: \$3,001.37.
  - Payment: Payment Type: Visa; Name on Card: ada; Visa #: \*\*\*\*\*1111; Amount: \$3,001.37.
  - Next: Order Confirmation.

Fig 4.22 [Admin Site] Reactivate lyndaPro Master Admin Membership

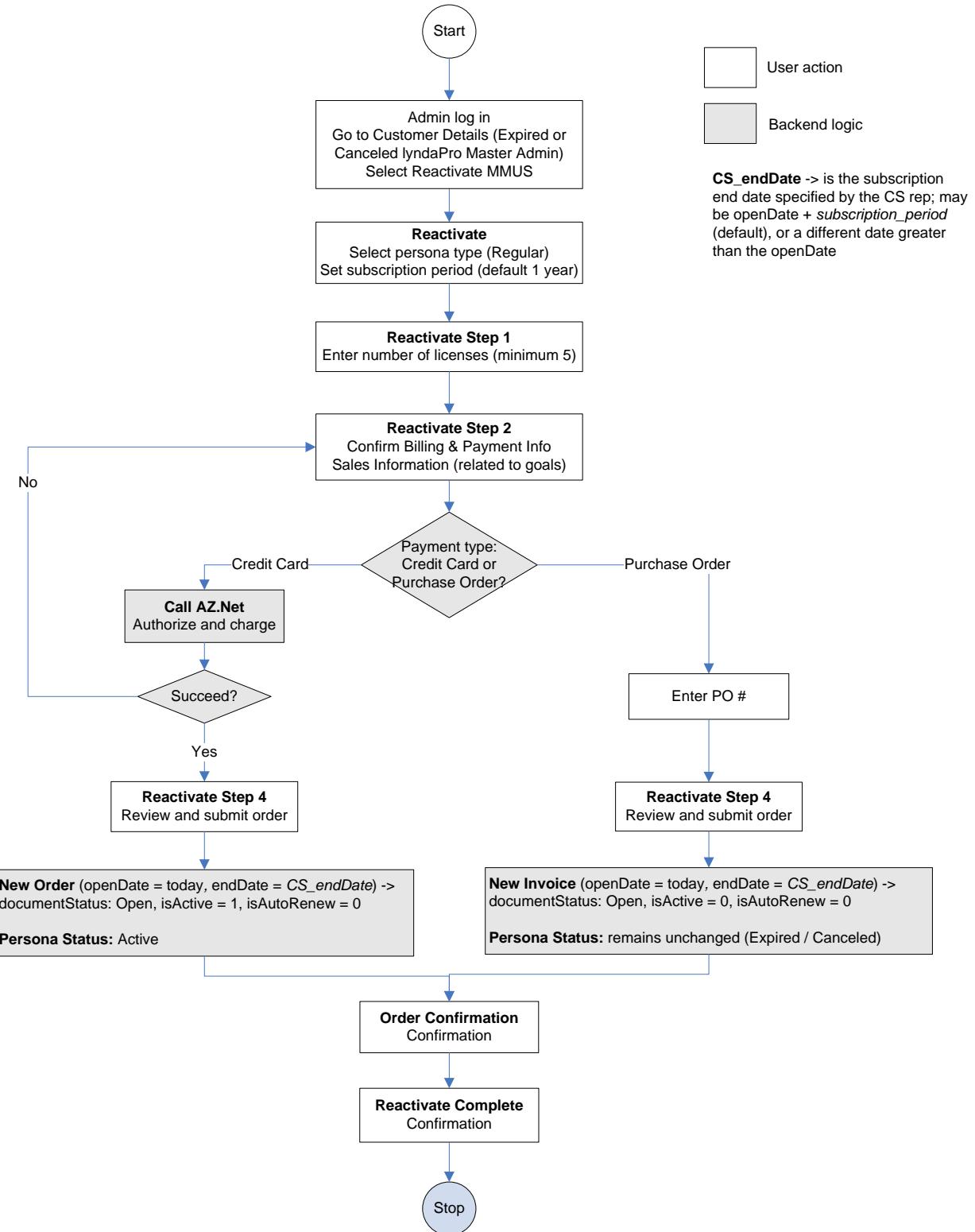


Fig 4.23 Reactivate lyndaPro Master Admin Membership from Admin Site

## 4.16 [lyndaPro Master Admin / lyndaPro User] Add Additional Persona (New Quote) – Admin Site

This flow is followed by Customer Support representatives who make an offer for a different product than lyndaPro to a lyndaPro Master Admin or to a lyndaPro User. The current persona (lyndaPro Master Admin or lyndaPro User) is not affected in this case – the system simply adds another persona to the account, corresponding to the product selected in the Quote.

Note: For the visual flow, please check the [Consumer Upgrade \(New Quote\) – Admin Site](#), which is similar (the quote creation flow is the same, but the invoice quote flow might differ, depending on the product selected in the Quote).

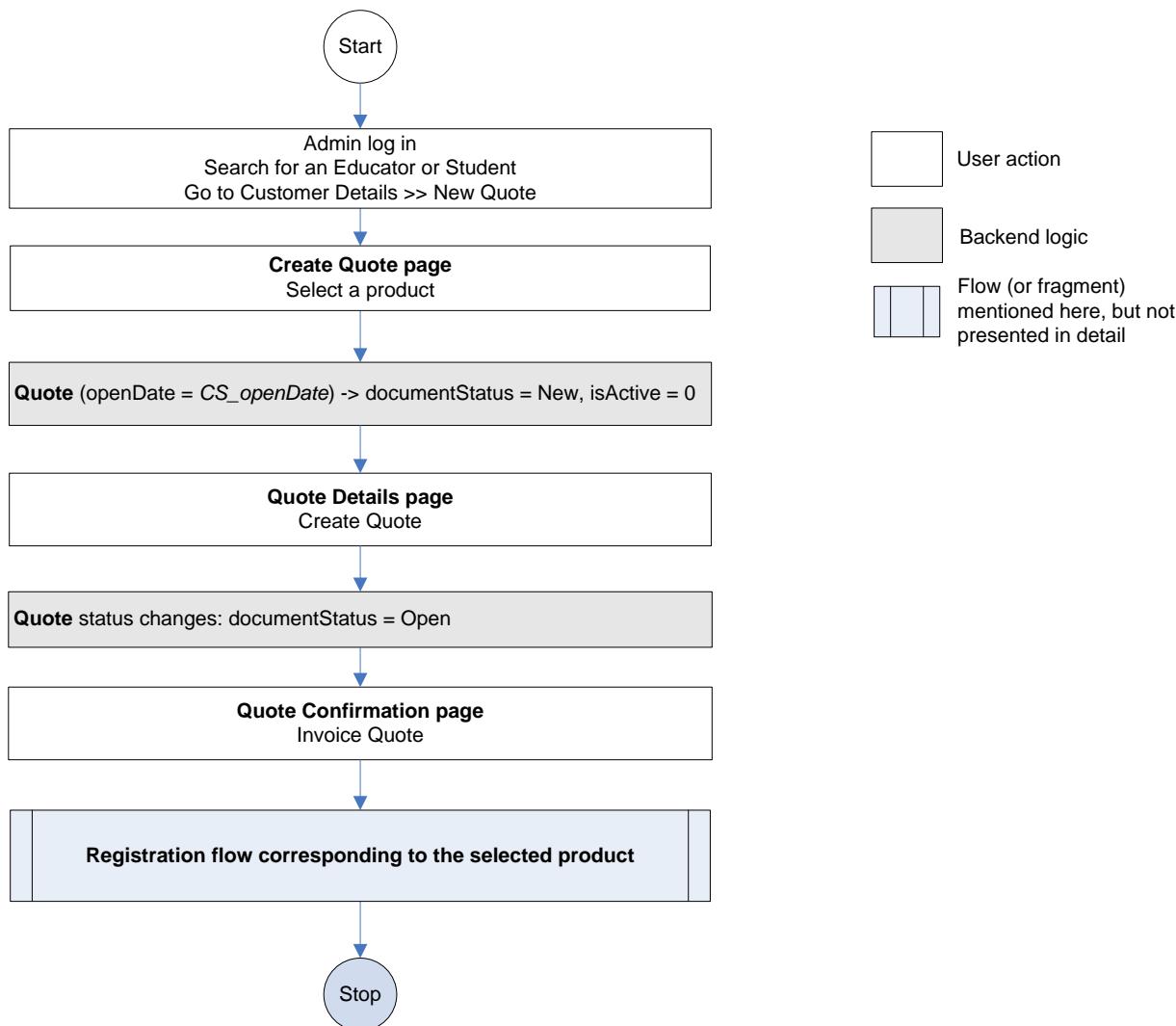


Fig 4.24 Add Additional Persona to lyndaPro Master Admin / lyndaPro User from Admin Site

## 4.17 [lyndaPro User] Registration – Public Site

This flow is followed by users that received an invitation from a lyndaPro Master Admin to join one of their groups. lyndaPro Users are not required to pay for the subscription (hence no document will be created for them), since the lyndaPro Master Admin is the one taking care of this aspect.

Note: The flow can only be followed from the Public site. lyndaPro Users cannot be created from the Admin site by a Customer Support representative, it's mandatory that they have a lyndaPro Master Admin associated to them.

The figure consists of three screenshots of a web browser showing the lyndaPro user registration process. The browser address bar shows the URL for each step: Step 1 is <http://10.1.161.83/lyndaPro/UserRegistration/UserRegistrationStep1.aspx>; Step 2 is <http://10.1.161.83/lyndaPro/UserRegistration/RegisterOrLogin.aspx>; and the Confirmation page is <http://10.1.161.83/lyndaPro/userregistration/registrationconfirmation.aspx>. The browser interface includes a back button, forward button, stop button, refresh button, and a search bar. The top navigation bar for lynda.com includes links for 'Become a member', 'products', 'support', 'subscribe', 'reactivate', and 'log in'. A search bar at the top right contains the placeholder 'What would you like to learn?'. Below the search bar is a 'search' button. The main content area for Step 1 contains fields for 'Group Code' (with value '14404') and 'Email address your invitation was sent to' (with value 'amiron@softvision.ro'). A 'continue' button is at the bottom left. A red arrow labeled '1' points down to the 'Group Code' field. A red arrow labeled '2' points down to the 'Email address...' field. A red arrow labeled '3' points down to the 'continue' button. The main content area for Step 2 contains a section for 'New, current, or returning lynda.com user'. It has a dropdown menu for 'Already a lynda.com member?' set to 'No'. Below it is a note: 'Choose "yes" if you've ever had an account, even if it is currently expired or inactive.' A 'Create account' section follows, containing fields for 'First Name' (Ada), 'Last Name' (M), 'Email' (amiron@softvision.ro), 'Choose User Name' (empty), 'Choose Password' (empty), and 'Password (confirm)' (empty). A 'back' button is on the left and a 'continue' button is on the right. A red arrow labeled '2' points down to the 'Create account' section. A red arrow labeled '3' points down to the 'continue' button. The Confirmation page displays the message 'Your registration is complete! Start learning now by browsing for courses using the subject, software, author or new drop-down menus at the top of the page, or enter what you would like to learn in the search box.' A red arrow labeled '3' points down to this message.

Fig 4.25 [Public Site] lyndaPro User Registration

## **4.18 [lyndaPro User] Upgrade to lyndaPro – Admin Site**

This flow is followed by Customer Support representatives who upgrade a lyndaPro User to the statute of lyndaPro Master. This action will not affect this customer's lyndaPro User persona, it will simply add a new persona (lyndaPro Master Admin) to the account.

This is the only action besides creating brand new accounts that can be performed from the Admin site without the help of New Quotes.

Note: For the visual flow, please check the [Consumer Upgrade to lyndaPro](#), which is similar. For the diagram, please scroll down a bit.

## **4.19 [lyndaPro User] Reactivate Membership – Public Site**

This flow is followed by Expired/Cancelled lyndaPro Users who would like to reactivate their account. In this case, the account is reactivated by purchasing an Individual Subscription, which adds a Consumer persona to the account. The lyndaPro persona will not be affected in any way in this case, it will remain with persona status Expired/Cancelled.

It's possible for expired/cancelled lyndaPro Users to reactivate their account by purchasing a different subscription type than Individual Subscriptions, but in this case they don't have a direct link, instead they need to visit the desired product's landing page and subscribe from there.

Note: For the step-by-step flow, please check the [Reactivate Consumer – Public Site](#), which is similar.

## **4.20 [lyndaPro User] Reactivate Membership – Admin Site**

This flow is followed by Customer Support representatives who reactivate an Expired/Cancelled lyndaPro User's account. In this case, the account is reactivated by purchasing an Individual Subscription, which adds a Consumer persona to the account. The lyndaPro User persona will not be affected in any way in this case, it will remain with persona status Expired/Cancelled.

Reactivating through an individual subscription can be performed without the use of New Quotes. But the account can actually be reactivated by purchasing any other subscription type, in which case New

Quotes need to be used. The Customer Support representative is given the possibility to reactivate the Consumer either as a regular member (paid membership) or as a complimentary member (free membership)

Note: For the step-by-step flow, please check the [Reactivate Consumer – Admin Site](#), which is similar.

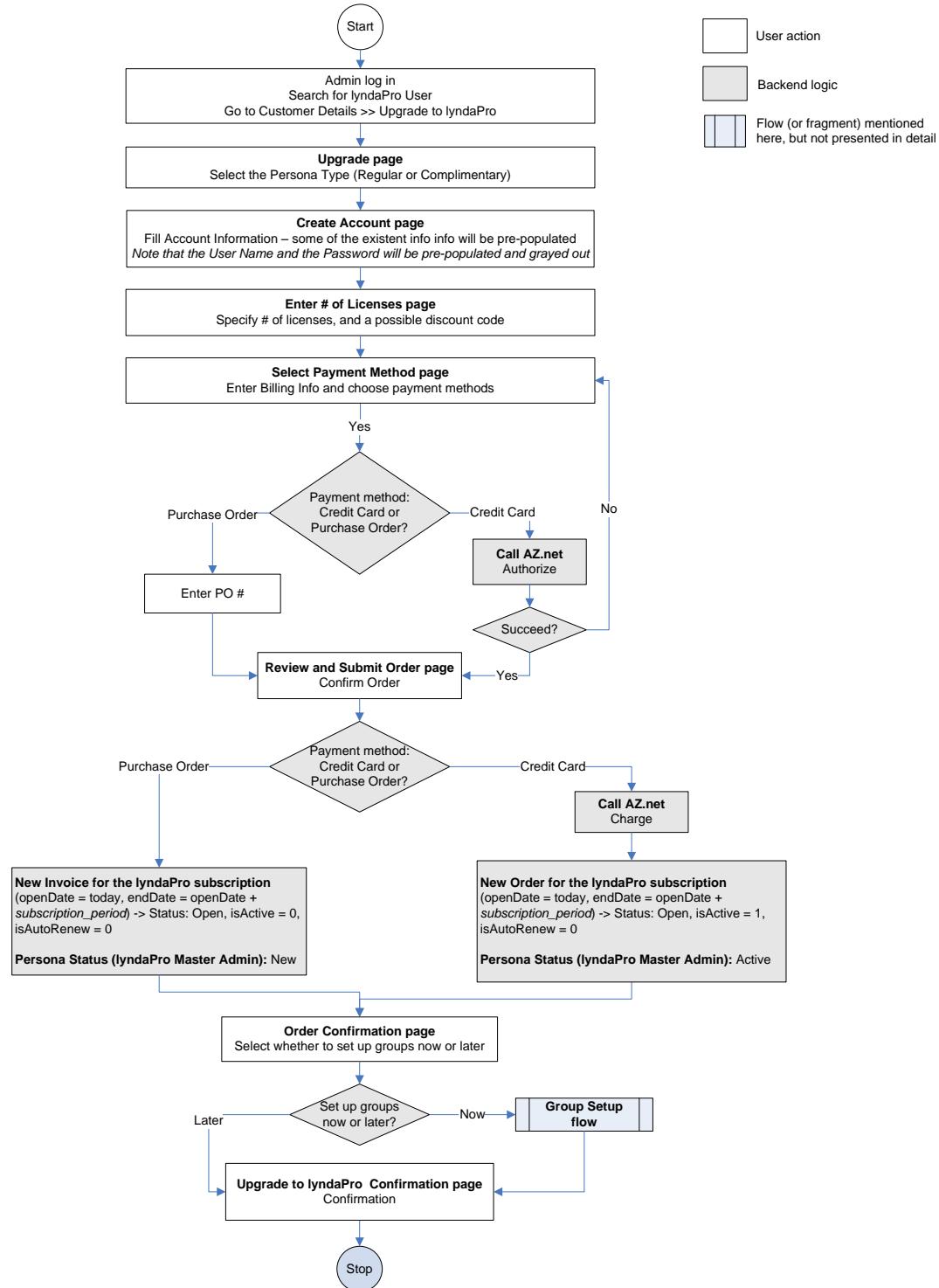


Fig 4.26 lyndaPro User Upgrade to lyndaPro Master Admin from Admin Site

# 5. lyndaClassroom Flows



- **Public site flows**
- **Admin site flows**

## **5.1 [Educator] Registration – Public Site**

This flow is followed by teaching members of educational institutions who are in need of creating online classes for their students, thus they register for a lyndaClassroom membership.

Along with their students, Educators have complimentary access to the courses selected for each of their classes (maximum 5 courses). As far as the other courses not assigned to any of their classes, Educators have access to the free movies only.

[lyndaClassroom educator registration: Step 1 of 6 - Create your educator account](http://redesign.lynda.com/lyndaClassroom/EducatorRegistrationStep1.aspx)

If you already have an account with a past lynda.com account, click here.

**Educator's account information**

Country: Romania  
First name: Ana  
Last name: Ionescu  
Preferred name: Ana  
Department: IV  
School: Harvard  
Phone number: 12345  
Email: anna101@edu.harvard.edu  
Choose user name: anna112  
Cheese password: \*lat least 8 characters with letters and numbers!  
Password (confirm): \*

\* Required information

Submit documentation to show your educator status

In order to register as an educator, you must be a teaching member of an educational institution. Fax your document to (800) 477-3862, or email to [support@lynda.com](mailto:support@lynda.com).

Select Documentation: Select one... 

[Create your class](#) 

[lyndaClassroom educator registration: Step 2 of 6 - Create your class](http://redesign.lynda.com/lyndaClassroom/EducatorRegistrationStep2.aspx)

Your transaction is secure   

What our customers are saying

I think lynda.com is a fabulous resource for distance learning educators alike, and is the future learning platform for the computer. Your service allows me to place the focus back on the educational aspects of my courses, and get caught up in the smaller details of the program that require short term memory and conceptual learning. Thank you for your support!

Student transaction is secure   

What our customers are saying

I think lynda.com is a fabulous resource for distance learning educators alike, and is the future learning platform for the computer. Your service allows me to place the focus back on the educational aspects of my courses, and get caught up in the smaller details of the program that require short term memory and conceptual learning. Thank you for your support!

[Create your class](#) 

[lyndaClassroom educator registration: Step 3 of 6 - Review and submit class](http://redesign.lynda.com/lyndaClassroom/EducatorRegistrationStep3.aspx)

Your transaction is secure   

What our customers are saying

I think lynda.com is a fabulous resource for distance learning educators alike, and is the future learning platform for the computer. Your service allows me to place the focus back on the educational aspects of my courses, and get caught up in the smaller details of the program that require short term memory and conceptual learning. Thank you for your support!

[Create your class](#) 

[lyndaClassroom educator registration: Step 4 of 6 - Select your payment method](http://redesign.lynda.com/lyndaClassroom/EducatorRegistrationStep4.aspx)

Your transaction is secure   

What our customers are saying

I think lynda.com is a fabulous resource for distance learning educators alike, and is the future learning platform for the computer. Your service allows me to place the focus back on the educational aspects of my courses, and get caught up in the smaller details of the program that require short term memory and conceptual learning. Thank you for your support!

[Create your class](#) 

[lyndaClassroom educator registration: Step 5 of 6 - Confirm payment information](http://redesign.lynda.com/lyndaClassroom/EducatorRegistrationStep5.aspx)

Your transaction is secure   

What our customers are saying

I think lynda.com is a fabulous resource for distance learning educators alike, and is the future learning platform for the computer. Your service allows me to place the focus back on the educational aspects of my courses, and get caught up in the smaller details of the program that require short term memory and conceptual learning. Thank you for your support!

[Create your class](#) 

[lyndaClassroom educator registration: Step 6 of 6 - Complete](http://redesign.lynda.com/lyndaClassroom/EducatorRegistrationStep6.aspx)

Your transaction is secure   

What our customers are saying

I think lynda.com is a fabulous resource for distance learning educators alike, and is the future learning platform for the computer. Your service allows me to place the focus back on the educational aspects of my courses, and get caught up in the smaller details of the program that require short term memory and conceptual learning. Thank you for your support!

[Create your class](#) 

[Send email](#)  [Skip email](#) 

## Fig 5.1 [Public Site] Educator Registration

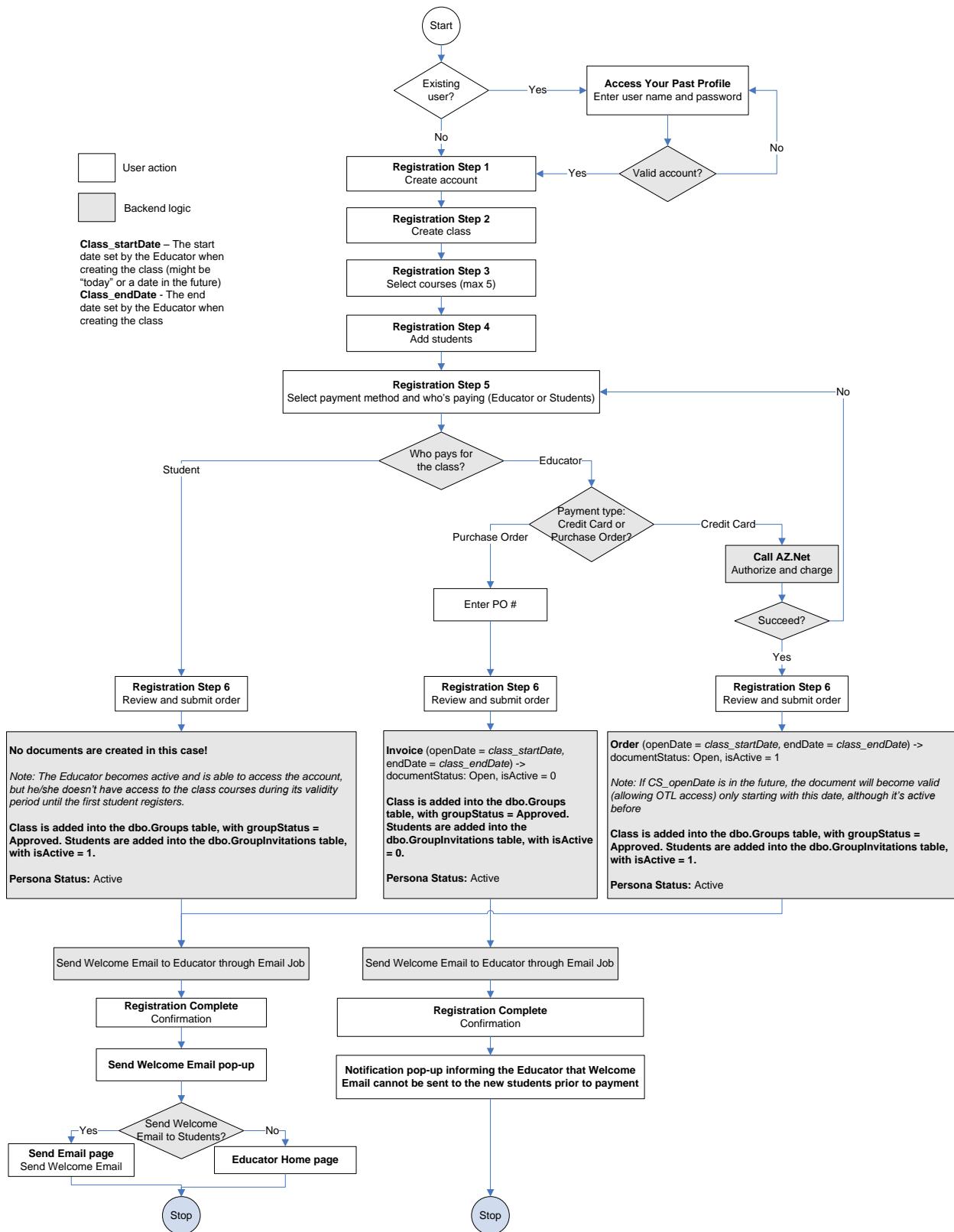


Fig 5.2 Educator Registration from Public Site

## 5.2 [Educator] Registration – Admin Site

This flow is followed by Customer Support representatives who create lyndaClassroom accounts to teaching members of educational institutions at their request.

**Step 1:** lynda.com admin - New Account

**Step 2:** lynda.com admin - Educator Registration: Complete

**Step 3:** lynda.com admin - Educator Registration: 1 of 6 - Create a lyndaClassroom account

**Step 4:** lynda.com admin - Educator Registration: 2 of 6 - Create your class

**Step 5:** lynda.com admin - Educator Registration: 3 of 6 - Select courses

**Step 6:** lynda.com admin - Educator Registration: 4 of 6 - Add students

**Step 7:** lynda.com admin - Educator Registration: 5 of 6 - Select payment method

**Step 8:** lynda.com admin - Educator Registration: 6 of 6 - Review and submit class

The screenshots show the following details:

- Step 1:** Shows the 'New Account' section with options for different account types (e.g., lyndaPro admin, Education, Consumer, Institutional admin, lyndaCampus admin).
- Step 2:** Confirmation message: "You have successfully created an Educator account for Ada H. The class history 2D registered for the period 9/5/2011 - 9/24/2011 will be paid by the students." Includes a 'continue' button.
- Step 3:**填写账户信息，包括国家（Romania）、姓名（Ada H. M.）、职位（edu）、学校（harvard）、电话（12345）和电子邮件（amara@softvision.rs）。
- Step 4:** 创建课程，输入班级名称（history 2D）、开始日期（09/05/2011）和结束日期（09/24/2011）。
- Step 5:** 选择课程，显示了“2D Character Animation”和“3ds Max 2010 Textures and Materials”。
- Step 6:** 添加学生，显示了两个学生记录：aaa last 和 bbb last，以及一个“Edit”按钮。
- Step 7:** 选择支付方法，显示了两个选项：由学生个人支付或由学校/导师支付。
- Step 8:** 审查并提交课程信息，显示课程历史、学生列表、支付信息（每生 \$13.33）和一个“Approve Now”按钮。

Fig 5.3 [Admin Site] Educator Registration

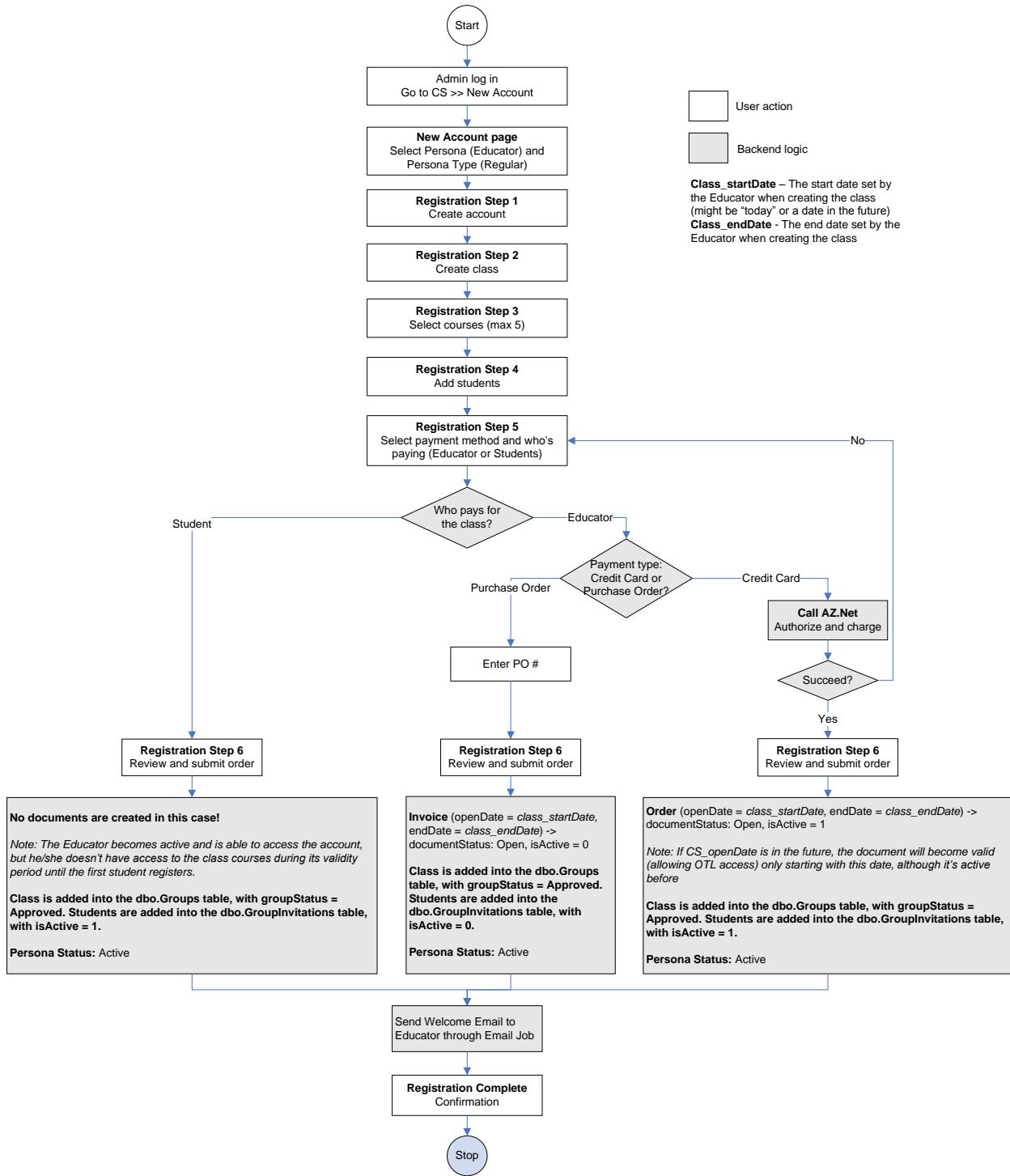


Fig 5.4 Educator Registration from Admin Site

## 5.3 [Educator] Complimentary Account – Admin Site

This flow is followed by Customer Support representatives who create lyndaClassroom complimentary (free) accounts to teaching members of educational institutions at their request. In this case the Educator's persona type will be complimentary, and the class will be considered as Educator-paid. In case the Educator adds new students to the class, or creates a new class, new documents will be created, regular and paid in full -> in this moment the Educator's persona type should turn into Regular.

Note: For the visual step-by-step flow, please check the [Educator Registration – Admin Site](#), which is similar.

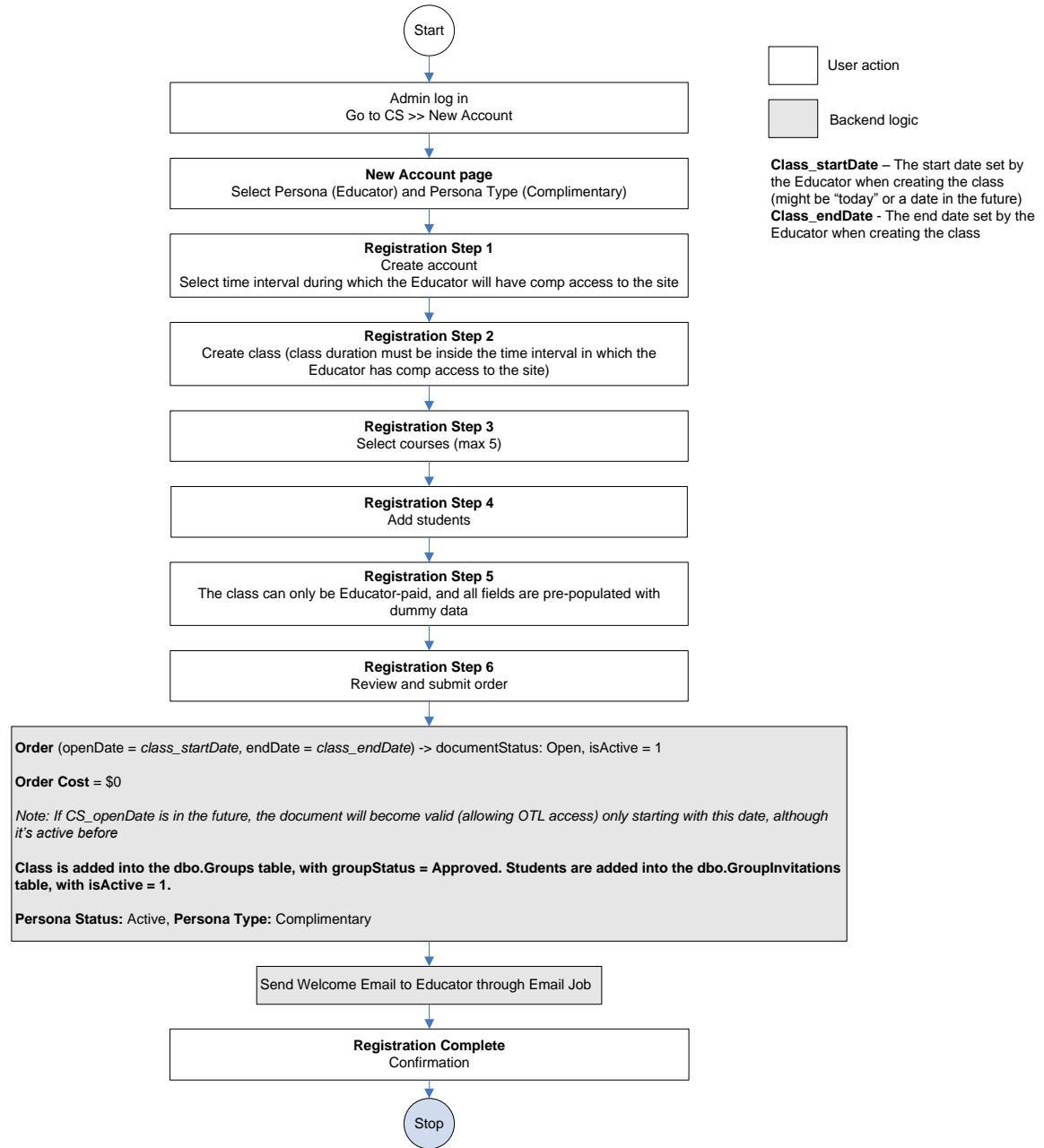


Fig 5.5 Educator Complimentary Account from Admin Site

## 5.4 [Educator/Student] Comp Extension – Admin Site

This flow is followed by Customer Support representatives who decide to grant a given Educator a free extension to one of their classes. This can also go the other way around, the Customer Support representative being able to reduce the current class duration. In order for a class to be eligible for extension, it needs to meet the following criteria: for Educator-paid classes payment must be received, while for Student-paid classes at least 1 student needs to be registered.

Comp Extension can be performed either from an Educator account, or from a Student account – either way, both the Educator and all existing and future students from the given class are affected (meaning that their access to the class will be extended or reduced, this being reflected on their documents' endDate).

**Important:** In case of student-paid classes, the Student Cost for students that will register after the class was extended (reduced) will be recalculated, depending on the new class duration.

The figure consists of three screenshots of the lynda.com admin site, each with a red numbered arrow indicating the next step in the process:

- Screenshot 1: Complimentary Extension Subscription**  
A screenshot of the 'Complimentary Extension Subscription' page. It shows a dropdown menu 'Select a group:' with 'math' selected. A red arrow labeled '1' points down to the 'Continue' button.
- Screenshot 2: Complimentary Extension Amount**  
A screenshot of the 'Complimentary Extension Amount' page. It shows a date input field set to '10/10/2011'. A red arrow labeled '2' points down to the 'OK' button.
- Screenshot 3: Complimentary Extension Success**  
A screenshot of the 'Complimentary Extension Success' page. It displays the message '16 days Comp Extension has been successfully issued to this customer. The expiration date has been changed from 9/25/2011 to 10/10/2011'. A red arrow labeled '3' points down to the 'Continue' button.

Fig 5.6 [Admin Site] Educator Comp Extension

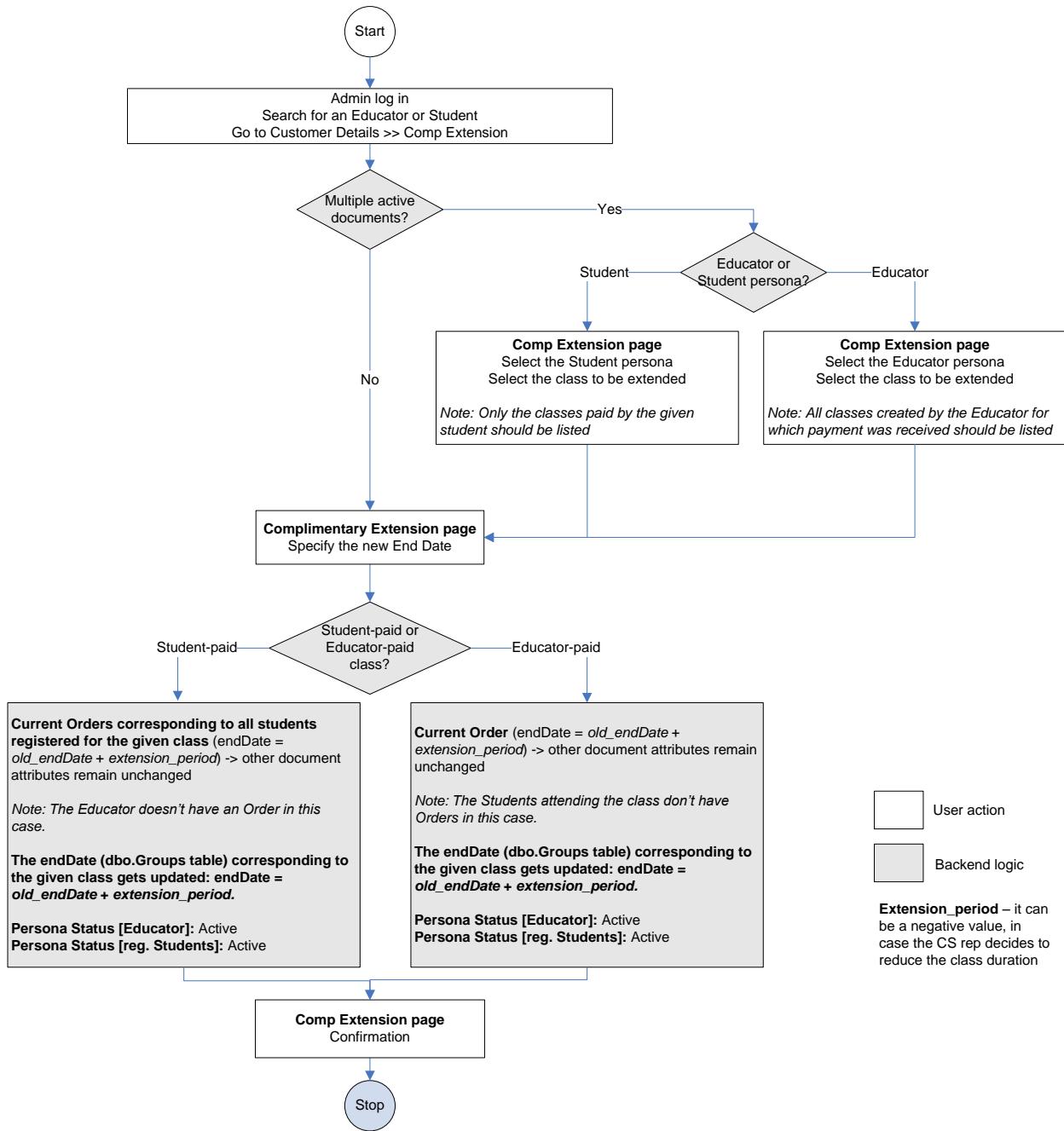


Fig 5.7 Educator/Student Comp Extension from Admin Site

## 5.5 [Educator] Apply Payment to Invoice – Admin Site

This flow is followed by Customer Support representatives who confirm partial or full payment of unpaid or partially paid Invoices coming from an Educator.

Note: For the visual flow, please see the [Apply Payment to Invoice](#) corresponding to Consumers, which is similar.

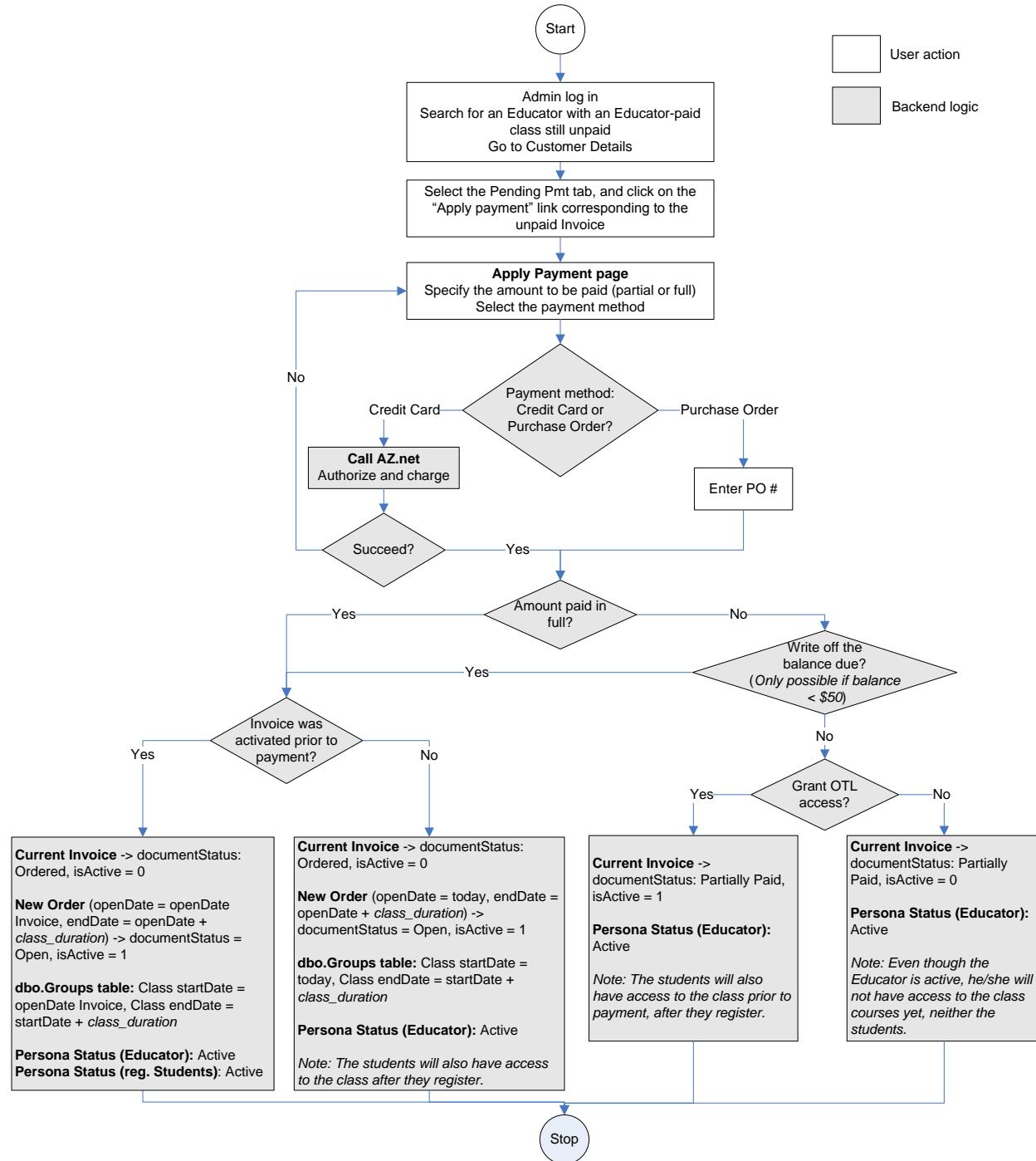


Fig 5.8 Apply Payment to Invoice from Admin Site

## 5.6 [Educator] Create Class – Public Site

This flow is followed by Educators from the Public site, when they want to create a new class.

**Step 1: Create your class**

The first screenshot shows the 'Create your class' page. A red arrow labeled '1' points down to the 'School Name' field, which is set to 'harvard'. Another red arrow labeled '2' points down to the 'Class Name' field, which is set to 'math'. A third red arrow labeled '3' points down to the 'Start Date' field, which is set to '09/02/2011' and 'End Date' field, which is set to '09/30/2011'. A 'continue' button is at the bottom right.

**Step 2: Review and submit for approval**

The second screenshot shows the 'Review and submit for approval' page. It displays the class information: 'School Name: harvard', 'Class Name: math 3D', 'Start Date: 02 Sept 2011', and 'End Date: 30 Sept 2011'. A red arrow labeled '4' points up to the 'edit' link next to the End Date field.

**Step 3: Select your five lynda.com courses**

The third screenshot shows the 'Select your five lynda.com courses' page. A red arrow labeled '1' points to the 'Select Criteria' dropdown menu, which is set to 'By Software'. A red arrow labeled '2' points to the 'Select By Subject' dropdown menu, which is set to '3D & Animation'. A red arrow labeled '3' points to the 'Select Course' dropdown menu, which is set to '3ds Max 2011 Essential Training'. A red arrow labeled '4' points down to the 'courses' table, which lists '1. 2D Character Animation' and '2. 3ds Max 2010 New Features'. A 'continue' button is at the bottom right.

**Step 4: Payment information**

The fourth screenshot shows the 'Payment information' page. It displays the class cost as '\$29.00 (\$9.67 x 3 students)' and the 'Paid By: Educator'. A red arrow labeled '5' points up to the 'edit' link next to the Paid By field. A red arrow labeled '6' points up to the 'submit' button.

**Step 5: Select payment method**

The fifth screenshot shows the 'Select payment method' page. It displays the payment method as 'Purchase Order'. A red arrow labeled '3 -> 4' points from the previous 'Payment information' step to this one.

**Step 6: Billing information**

The sixth screenshot shows the 'Billing information' page. It displays the billing details: 'Country: Romania', 'First Name: Ada', 'Last Name: M', 'Company/Org. Name: harvard', 'Address: iq', 'Apt/Suite: ', 'City: ej', 'State/Province: ', 'Zip/Postal Code: ', 'Phone: 12345', 'Email: amiron112@softvision.ro', 'Email (confirm): amiron112@softvision.ro', and 'PO Number: 43768976'. A red arrow labeled '7' points up to the 'Required information' section.

Fig 5.9 [Public Site] Create Class by Educator

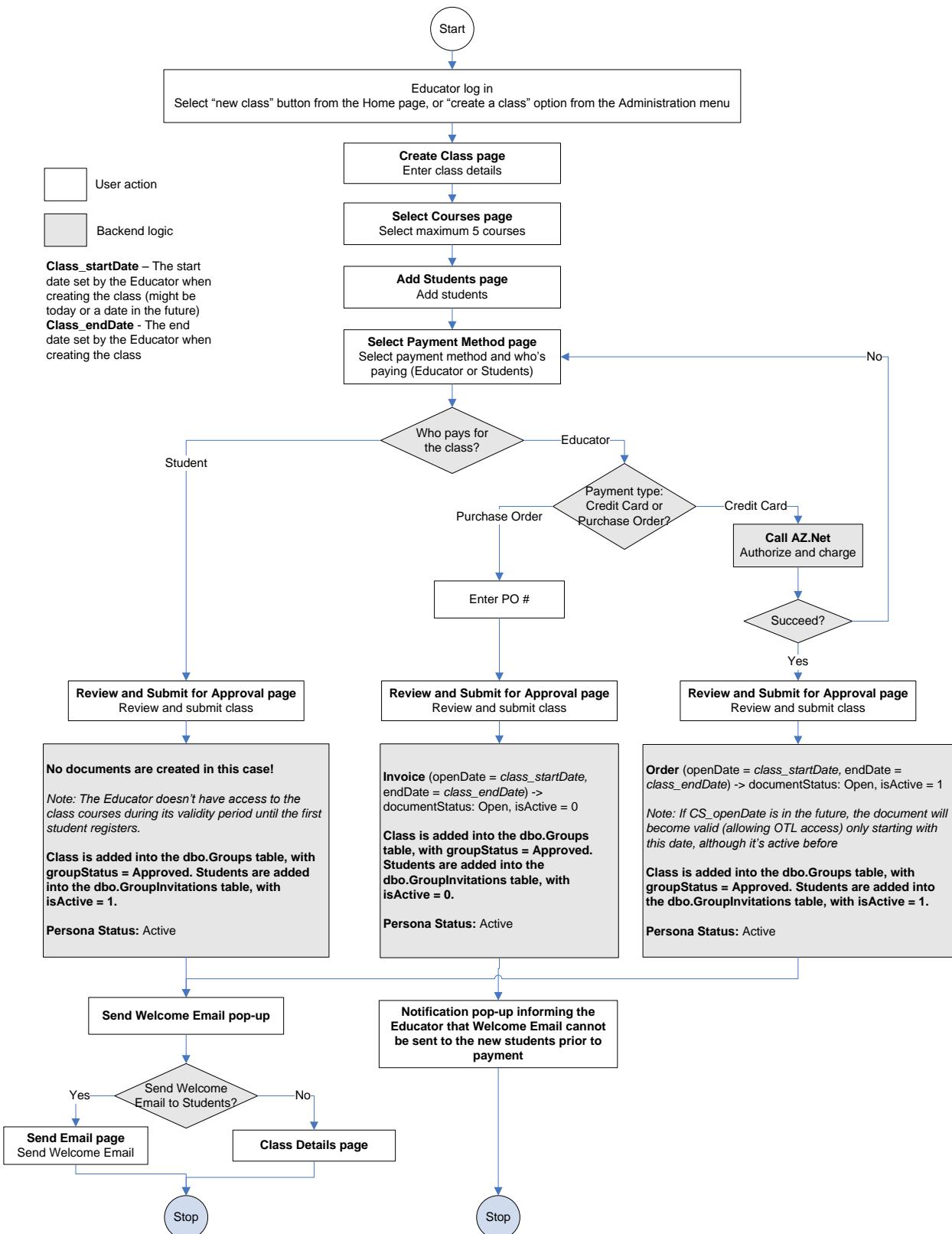


Fig 5.10 Create Class by Educator from Public Site

## 5.7 [Educator] Add Students to Class – Public Site

This flow is followed by Educators from the Public site, in case they need to add students to existent classes (complete or incomplete classes). Extra students cannot be added to cancelled/expired classes.

The screenshots illustrate the following steps:

- Step 1:** The user is on the 'Class Details' page for a class named 'math 1B'. The class has a duration of 07 Sep 2011 - 24 Sep 2011, a status of Approved, and a cost of \$6.00 (\$6.00 x 1 students). The user is prompted to 'Send Email'.
- Step 2:** A modal window titled 'Send email to students' appears, asking if the user wants to send an invitation email. It includes 'send email' and 'skip email' buttons.
- Step 3:** The user is on the 'Review and submit for approval' page. The class information is summarized: School Name: harvard, Class Name: math 1B, Start Date: 07 Sept 2011, End Date: 24 Sept 2011.
- Step 4:** The user is on the 'Select payment' page. They choose the payment method 'By student - each student will pay individually and be charged \$6.00'. The payment amount is \$12.00 (\$6.00 x 2 students).
- Step 5:** The user is on the 'Select payment type' page, choosing 'Credit Card'.
- Step 6:** The user is on the 'Billing information' page, entering details for a cardholder named 'ada chan' with address 123st-123 ave, phone 780-555-5555, and email adachan@raw.ca.
- Step 7:** The user is on the 'Credit card information' page, entering credit card details: Card Type: Visa, Card Number: 1111-1111-1111-1111, Name on Card: ada, Card Security Code: 123, and Expiration Date: 09-September-2011. A note states: 'To help protect your credit card, Visa has implemented AVS (Address Verification System). Your billing address must match the credit card billing address. If you have trouble, please call us toll-free at (888) 333-9432; to complete your order by phone, we'll be happy to assist you.'
- Step 8:** The user is on the 'Add students' page, where they can enter student names manually or upload an Excel spreadsheet. They have entered three student records: aaa last, bbb last, and ccc last.
- Step 9:** The user is on the 'Select payment method' page again, this time with a red arrow pointing to the '2 > 3' transition, indicating the process continues from step 4.
- Step 10:** The user is on the 'Select payment type' page, with a red arrow pointing to the '3' transition.
- Step 11:** The user is on the 'Billing information' page, with a red arrow pointing to the '4' transition.
- Step 12:** The user is on the 'Credit card information' page, with a red arrow pointing to the '5' transition.
- Step 13:** The user is on the 'Add students' page, with a red arrow pointing to the '1' transition.
- Step 14:** The user is on the 'Review and submit' page, with a red arrow pointing to the '2' transition.

Fig 5.11 [Public Site] Add Students to Class by Educator

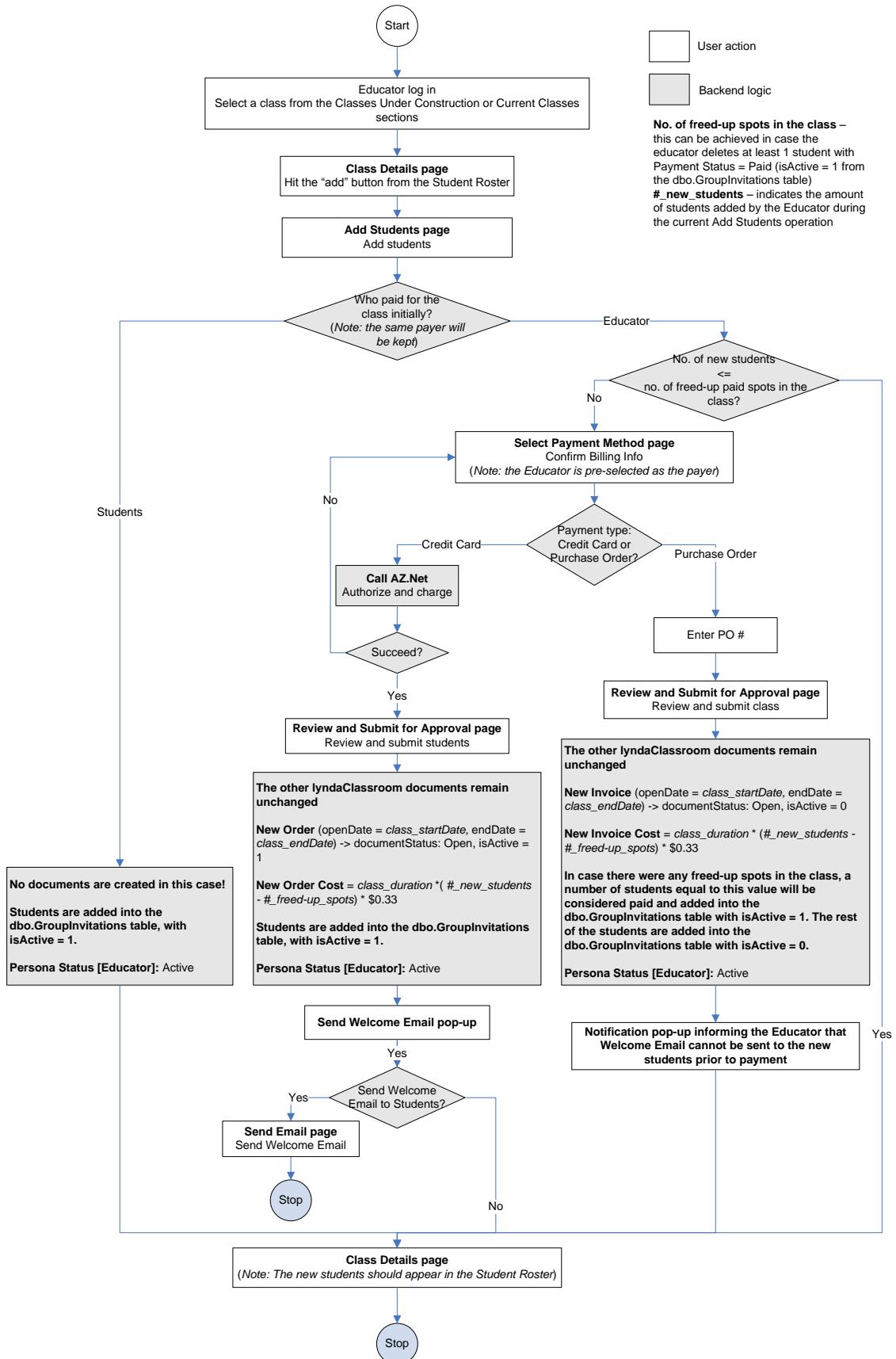


Fig 5.12 Add Students to Class by Educator from Public Site

## 5.8 [Educator] Cancel Class – Public Site

This flow is followed by Educators from the Public site, when they decide to cancel a class. Not all classes can be cancelled – only the ones with status Incomplete (which means that they don't meet all 4 criteria required for a class to become complete: to have at least 1 course assigned, to have at least 1 student added by the Educator, to have the Welcome Emails sent, and to be paid) for which no payment was received yet..

The screenshots illustrate the 'Cancel a class' workflow on the lyndaClassroom public site:

- Screenshot 1 (Top):** The user is on the 'Select a class' page. They have chosen 'All Schools' for the school, 'All Classes' for the class, and 'Class Duration' for the duration. A red vertical arrow labeled '1' points downwards to the second screenshot.
- Screenshot 2 (Bottom):** The user has selected the class 'art11S'. The page displays a summary of the class details:
  - Class:** art11S
  - School:** harvard
  - Duration:** 06 Sep 2011 - 27 Sep 2011
  - Status:** IncompleteA red vertical arrow labeled '2' points downwards to the bottom of the page, indicating the next step in the process.

Fig 5.13 [Public Site] Cancel Class by Educator

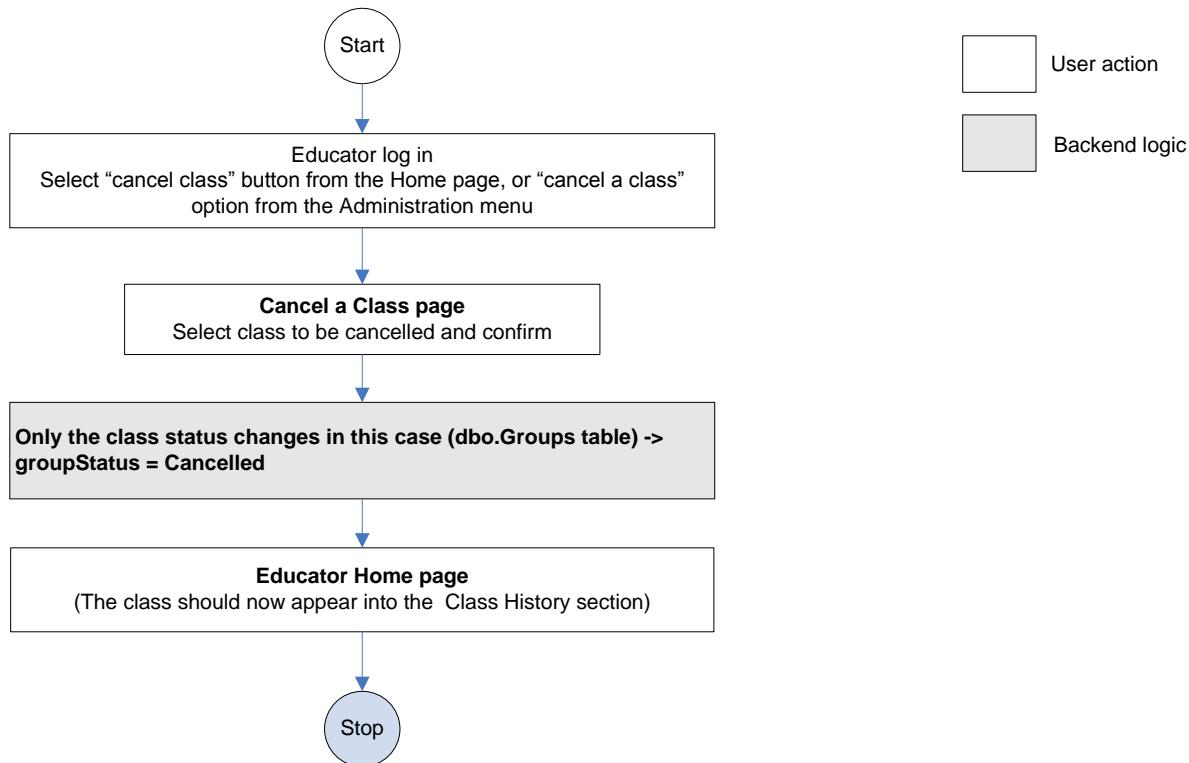


Fig 5.14 Cancel Class by Educator from Public Site

## 5.9 [Educator] Cancel Educator-paid Class (Cancel Order) – Admin Site

This flow is followed by Customer Support representatives from the Admin site, when they are required by some reason (abusive behavior on the Educator/Students part, or at the Educator's request) to cancel an Educator-paid class. Cancel may or may not be accompanied by a refund (partial or full), and the Customer Support representative is given the possibility to leave the class access until the current document expires, or to remove it from the Educator and the students registered for the given class starting with the cancellation moment.

Using this same flow, the Customer Support representative can just offer a refund to the Educator (partial or full) without cancelling the class. Or it's possible to set the Educator as abusive, in which case the current documents remain untouched, but the user is prevented from logging into the account.

Note: For the visual flow, please check the [Cancel Consumer Membership \(Cancel Order\)](#), which is similar.

## 5.10 [Educator] Cancel Educator-paid Class (Cancel Invoice) – Admin Site

This flow is followed by Customer Support representatives who need to cancel an Educator-paid class due to failure in applying payment to purchase orders in due time, abusive behavior, or at the Educator's request. Cancel may or may not be accompanied by a refund (partial or full), and the Customer Support representative is given the possibility to leave the OTL access (in case the invoice was prior activated) until the current document expires, or to remove it from the Educator and the students registered for the given class starting with the cancellation moment.

Using this same flow, the Customer Support representative can just offer a refund to the Educator (partial or full) without cancelling the class -> the refund cannot exceed the amount paid for the class.

This flow is not available for Student-paid classes, since this type of classes cannot be paid by Purchase Order, thus they can never have an Invoice associated to them.

Note: For the visual flow, please check the [Cancel Consumer Membership \(Cancel Invoice\)](#), which is similar. For the diagram, please scroll down a few pages.

## 5.11 [Student] Cancel Student-paid Class (Cancel Order) – Admin Site

This flow is followed by Customer Support representatives, when they are required by some reason to remove a student's access to a given class, either at the student's request, or due to abusive behavior on the student's part. This operation is possible only for student-paid classes, in which case the student has an Order corresponding to the given class, which can be cancelled. Cancel may or may not be accompanied by a refund (partial or full), and the Customer Support representative is given the possibility to leave the class access to the student until the current document expires, or to remove it from the given customer.

Using this same flow, the Customer Support representative can just offer a refund to the Student (partial or full) without affecting his/her access to the class. Or it's possible to set the Student as abusive, in which case the current documents remain untouched, but the user is prevented from logging into the account.

**Important:** The cancel operation only affects the selected student, not all the students registered for the given class.

Note: For the visual flow, please check the [Cancel Consumer Membership \(Cancel Order\)](#), which is similar. For the diagram, please scroll down a few pages.

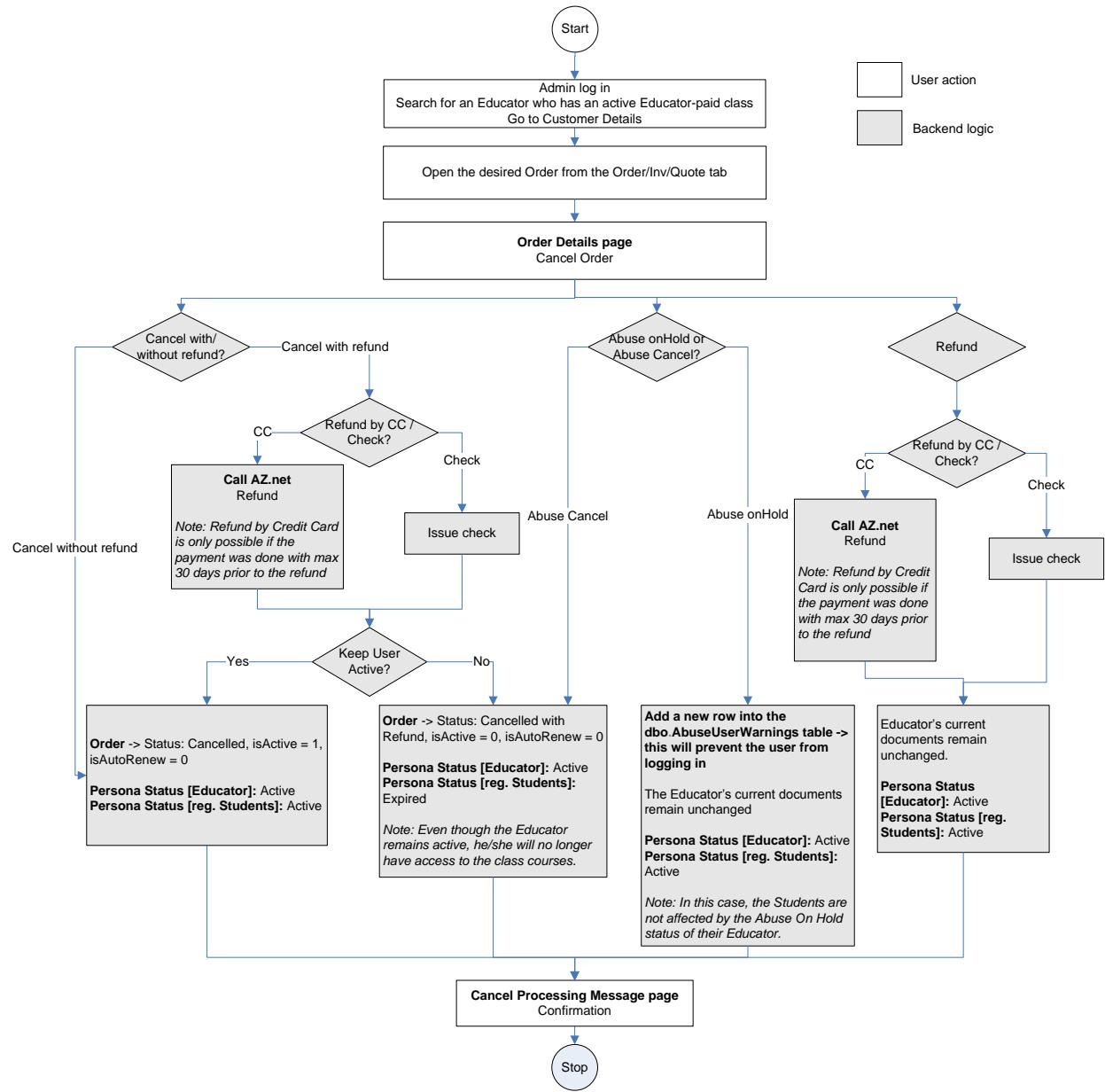


Fig 5.15 Cancel Educator-paid Class (Cancel Order) from Admin Site

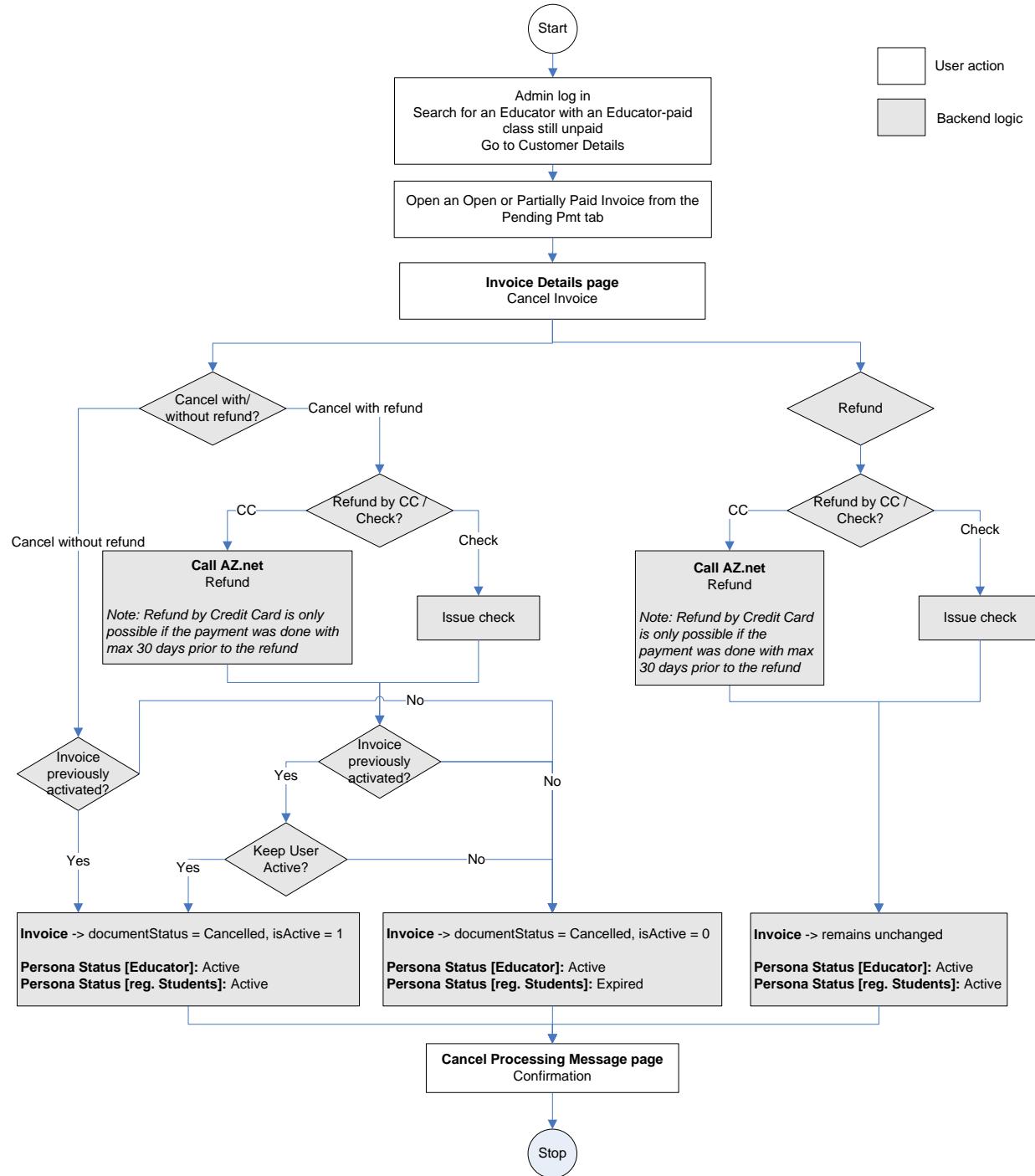


Fig 5.16 Cancel Educator-paid Class (Cancel Invoice) from Admin Site

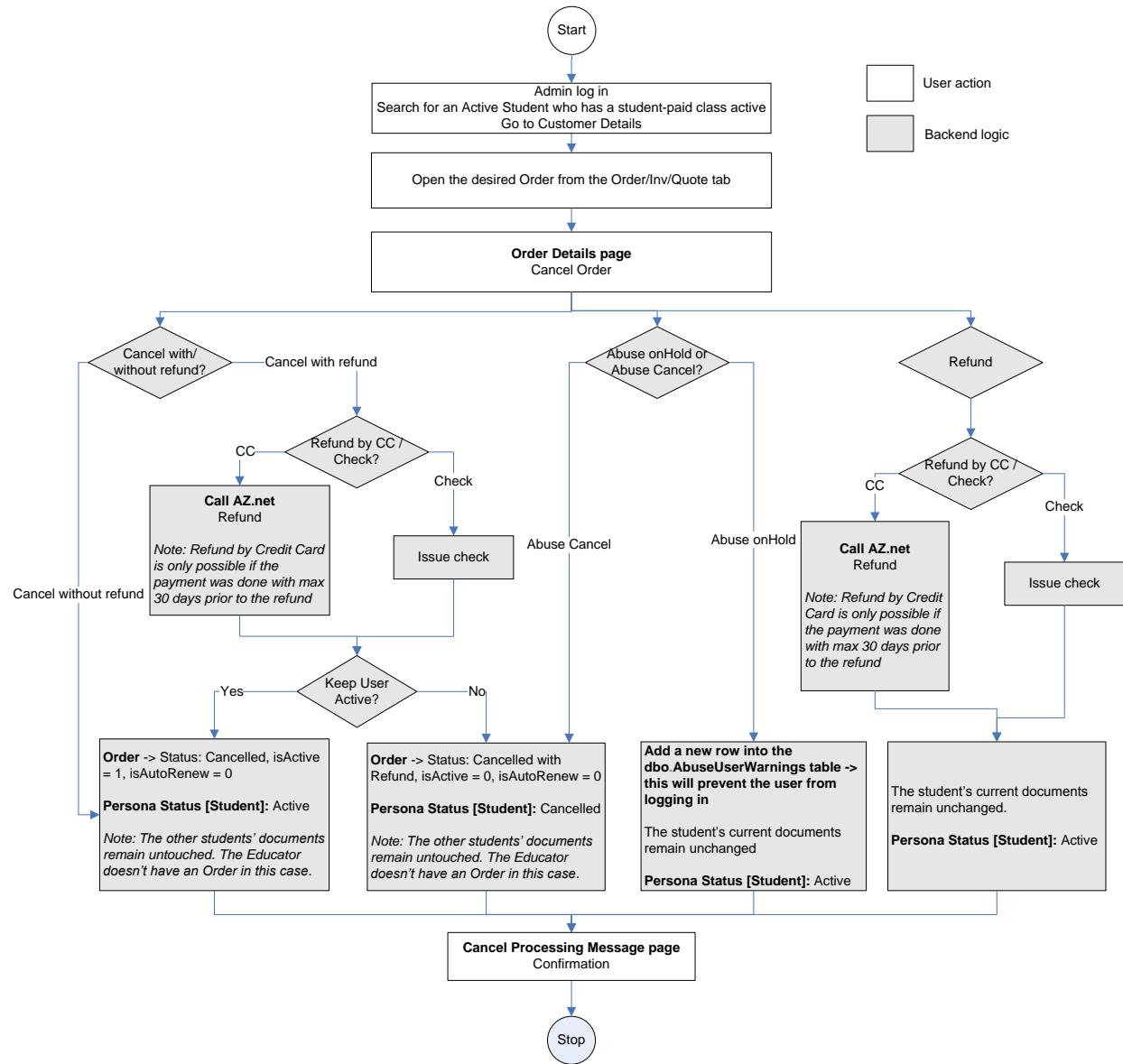


Fig 5.17 Cancel Student-paid class (Cancel Order) from Admin Site

# 5.12 [Educator/Student] Upgrade Membership – Public Site

This flow is followed by Educators or Students from the Public site, when they want to purchase an individual subscription (Monthly, Monthly Premium, Annual, Annual Premium), besides their lyndaClassroom membership. This operation simply adds a Consumer persona to their account, without affecting the lyndaClassroom membership.

They can also purchase another subscription type, which would add an additional persona to their account, but in this case they don't have a direct link/button for this, and need to visit the desired product's landing page in order to subscribe.

The figure consists of three screenshots of the lynda.com website, showing the upgrade process from an Educator/Student account to a consumer membership.

- Screenshot 1:** Shows the 'Account + Billing' section. A red arrow points to the 'upgrade membership' button.
- Screenshot 2:** Shows the 'Upgrade from Educator to Subscriber' step. A red arrow points to the 'Billing Information' section.
- Screenshot 3:** Shows the 'Registration Confirmation' page. A red arrow points to the 'Billing Conditions' section.

Fig 5.18 [Public Site] Educator/Student Upgrade

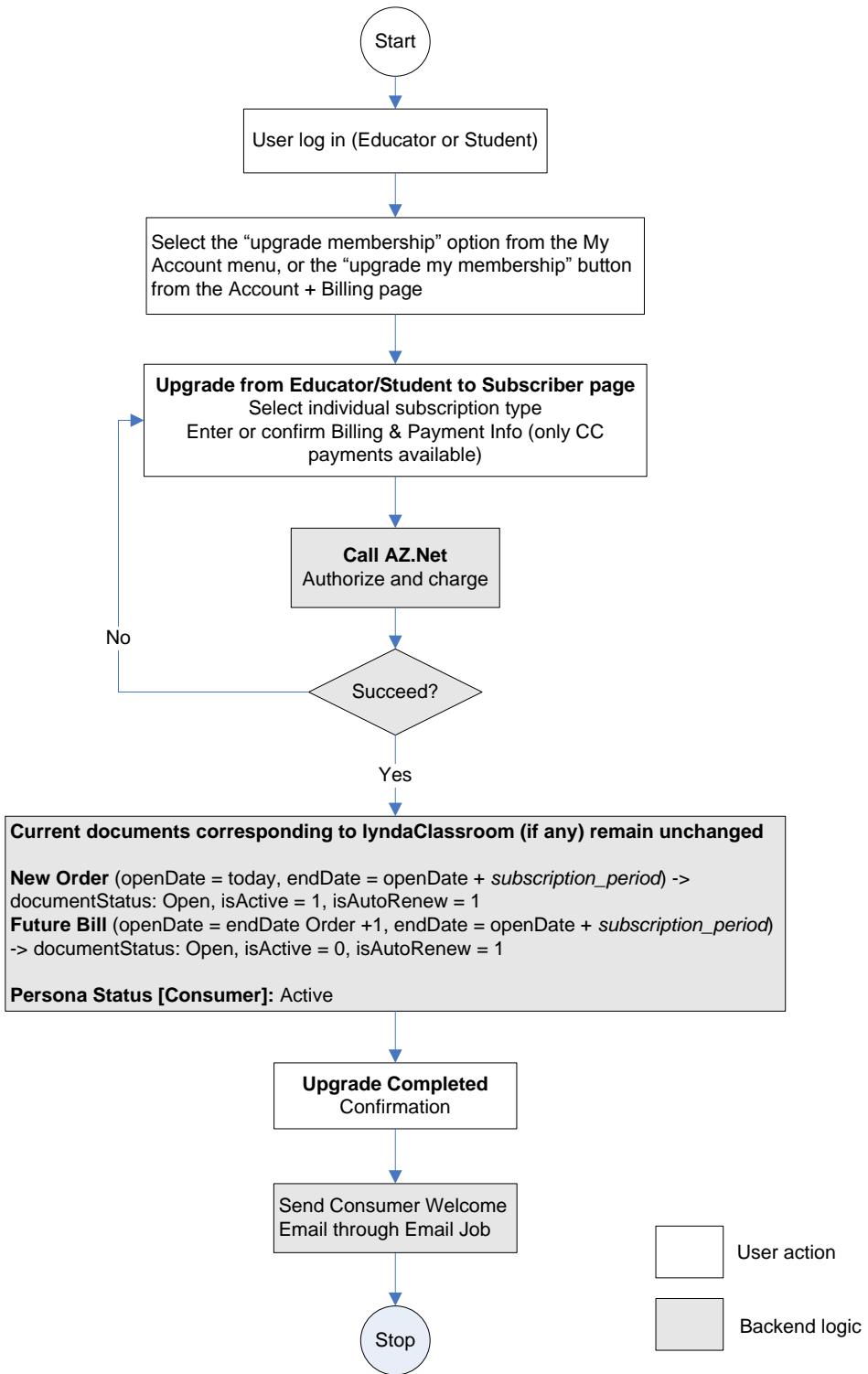


Fig 5.19 Educator/Student Upgrade from Public Site

## **5.13 [Educator/Student] Upgrade to lyndaPro – Admin Site**

This flow is followed by Customer Support representatives who upgrade an Educator's or Student's membership from a lyndaClassroom subscription to a lyndaPro subscription. This action will not affect this customer's Educator/Student persona, it will simply add a new persona (lyndaPro Master Admin) to the account.

This is the only action besides creating brand new accounts that can be performed from the Admin site without the help of New Quotes.

Note: For the visual flow, please check the [Consumer Upgrade to lyndaPro](#), which is similar. For the diagram, please scroll down a bit.

## **5.14 [Educator/Student] Additional Persona (New Quote) – Admin Site**

This flow is followed by Customer Support representatives who make an offer for a different product than lyndaClassroom to an Educator or Student. Just like in the case of Upgrade to lyndaPro flow, the current persona (Educator or Student) is not affected – the system simply adds another persona to the account, corresponding to the product selected in the Quote.

Note: For the visual flow, please check the [Consumer Upgrade \(New Quote\) – Admin Site](#), which is similar (the quote creation flow is the same, but the invoice quote flow might differ, depending on the product selected in the Quote). For the diagram, please check the [Additional Persona \(New Quote\) for lyndaPro](#), which is similar.

## **5.15 [Educator] Grant OTL Access (Activate Invoice) – Admin Site**

This flow is followed by Customer Support representatives who decide to grant OTL access to an Educator-paid class having an active (unpaid, or partially paid) Invoice (indicating that the selected payment method was Purchase Order). This means that the Educator together with the students subscribed to the class have access to the class prior to payment.

Note: For the step-by-step flow presented both in images and as a diagram, please see the [Grant OTL Access \(Activate Invoice\)](#) corresponding to Consumers, which is similar.

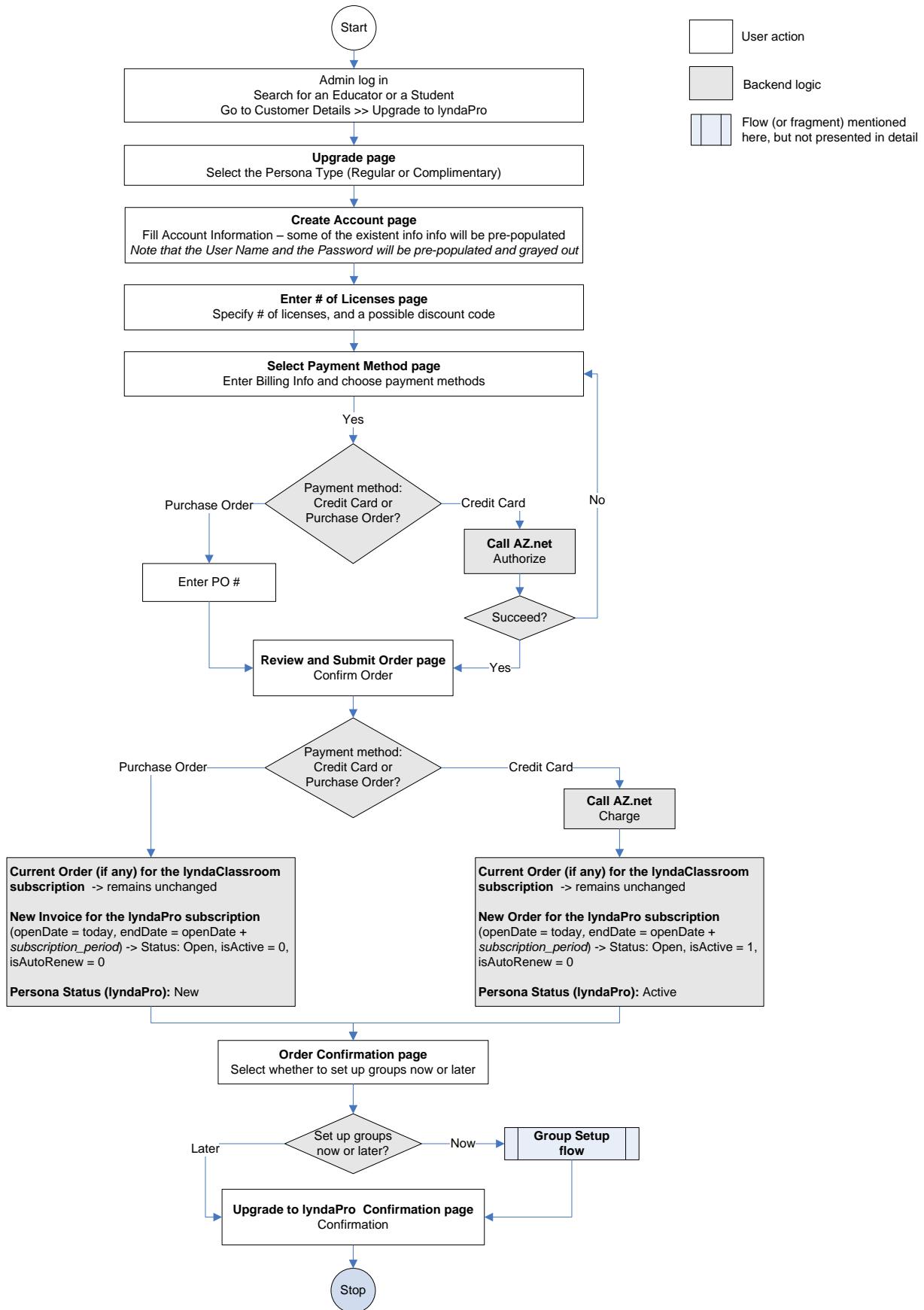


Fig 5.20 Educator/Student Upgrade to lyndaPro from Admin Site

# 5.16 [Student] Registration – Public Site

This flow is followed by users that received an invitation from an Educator, and are about to become Students of an Educator's class. Depending on the Educator's choice when creating the class, Students might have to pay for the class.

Note: The flow can only be followed from the Public site. Students cannot be created from the Admin site by a Customer Support representative, it's mandatory that they have an Educator associated to them.

The figure consists of five screenshots of a web browser displaying the lynda.com website for student registration. The steps are numbered 1 through 5:

- Step 1: Enter class code and email address**  
The user has entered a class code (091021C12362) and an email address (amron@fusion.rs). A red arrow labeled '1' points down to the 'continue' button.
- Step 2: Enter billing and credit card information**  
The user has filled out a form with their name, address, city, state/province, zip/postal code, phone number, and email. A red arrow labeled '2' points down to the 'continue' button.
- Step 3: Enter account details**  
The user has entered their first name (Ade), last name (M), company name (None), address (None), city (None), state/province (None), zip/postal code (None), phone number (123), and email (amron@fusion.rs). A red arrow labeled '3' points down to the 'continue' button.
- Step 4: Enter payment method**  
The user has selected a credit card type (Visa) and entered a card number (4411111111111111), expiration date (09/September), and security code (123). A red arrow labeled '4' points down to the 'continue' button.
- Step 5: Confirmation page**  
The user has completed the registration process. A message states: "Thank you for signing up! Your credit card transaction was approved, and your card was charged \$5.00. Your receipt has been emailed to you. Your membership is valid until September 17, 2011." It also says: "If your lynda.com class is in session, you can log in using the log in link, and access your lynda.com courses starting September 17, 2011." A red arrow labeled '5' points down to the 'continue' button.

Fig 5.21 [Public Site] Student Registration

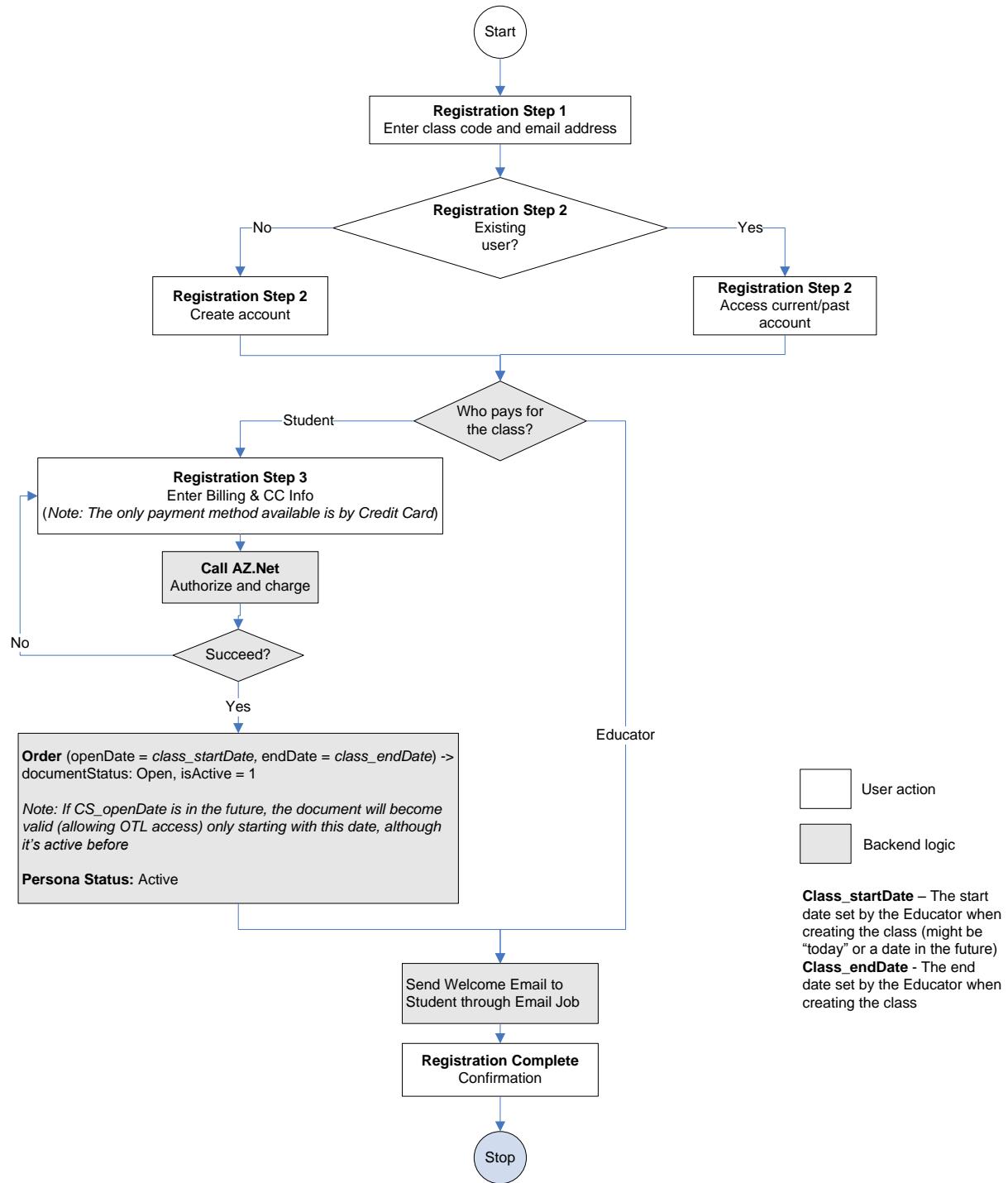


Fig 5.22 Student Registration from Public Site

## 5.17 [Student] Reactivate Membership – Public Site

This flow is followed by Expired/Cancelled Students who would like to reactivate their account. In this case, the account is reactivated by purchasing an Individual Subscription, which adds a Consumer persona to the account. The Student persona will not be affected in any way in this case, it will remain with persona status Expired/Cancelled.

It's possible for expired/cancelled Students to reactivate their account by purchasing a different subscription type than Individual Subscriptions, but in this case they don't have a direct link, instead they need to visit the desired product's landing page and subscribe from there.

Note: For the visual flow, please check the [Reactivate Consumer – Public Site](#), which is similar.

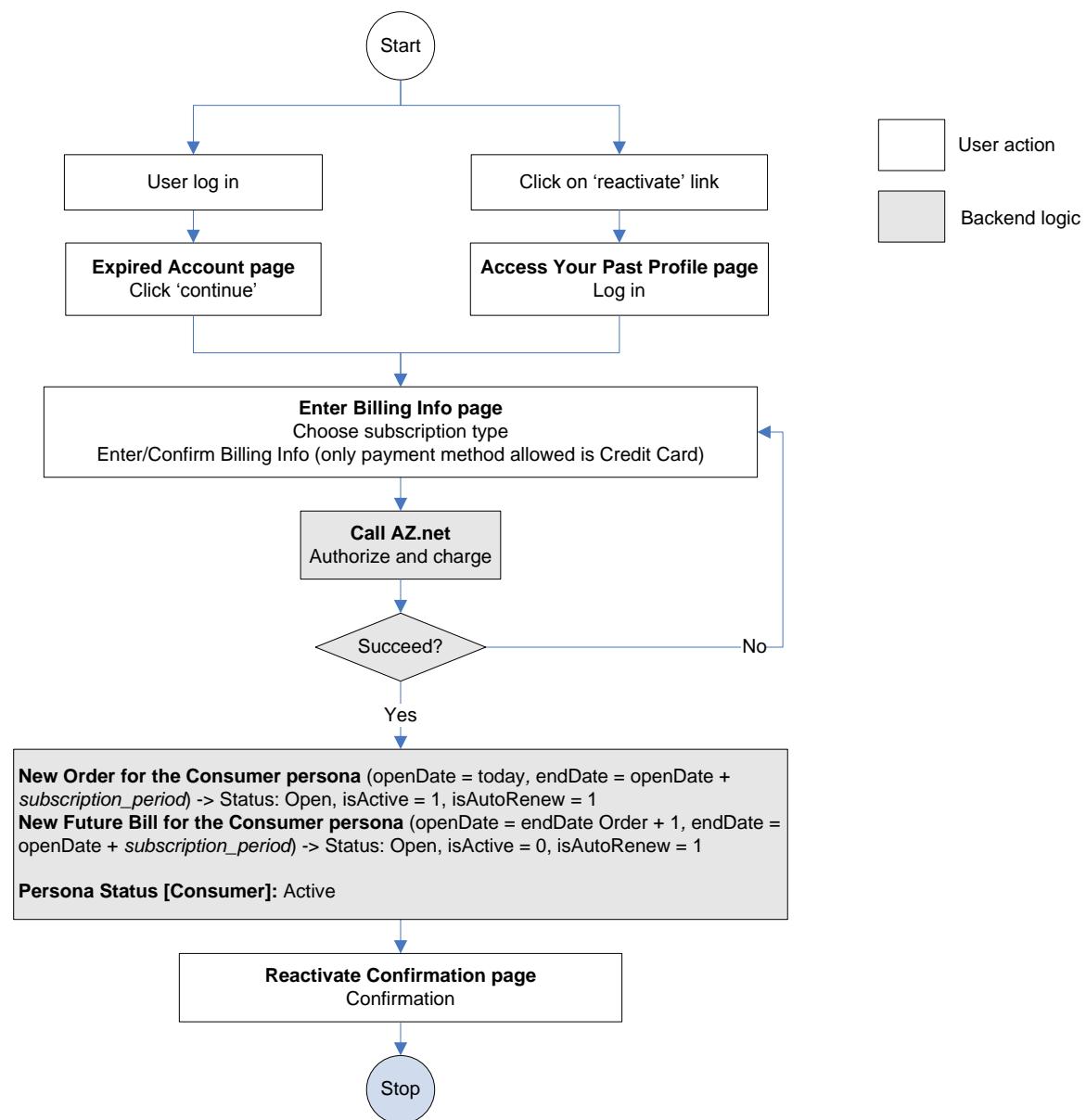


Fig 5.23 Student Reactivate from Public Site

## 5.18 [Student] Reactivate Membership – Admin Site

This flow is followed by Customer Support representatives who reactivate an Expired/Cancelled Student's account. In this case, the account is reactivated by purchasing an Individual Subscription, which adds a Consumer persona to the account. The Student persona will not be affected in any way in this case, it will remain with persona status Expired/Cancelled.

Reactivating through an individual subscription can be performed without the use of New Quotes. But the account can actually be reactivated by purchasing any other subscription type, in which case New Quotes need to be used. The Customer Support representative is given the possibility to reactivate the Consumer either as a regular member (paid membership) or as a complimentary member (free membership)

Note: For the visual flow, please check the [Reactivate Consumer – Admin Site](#), which is similar.

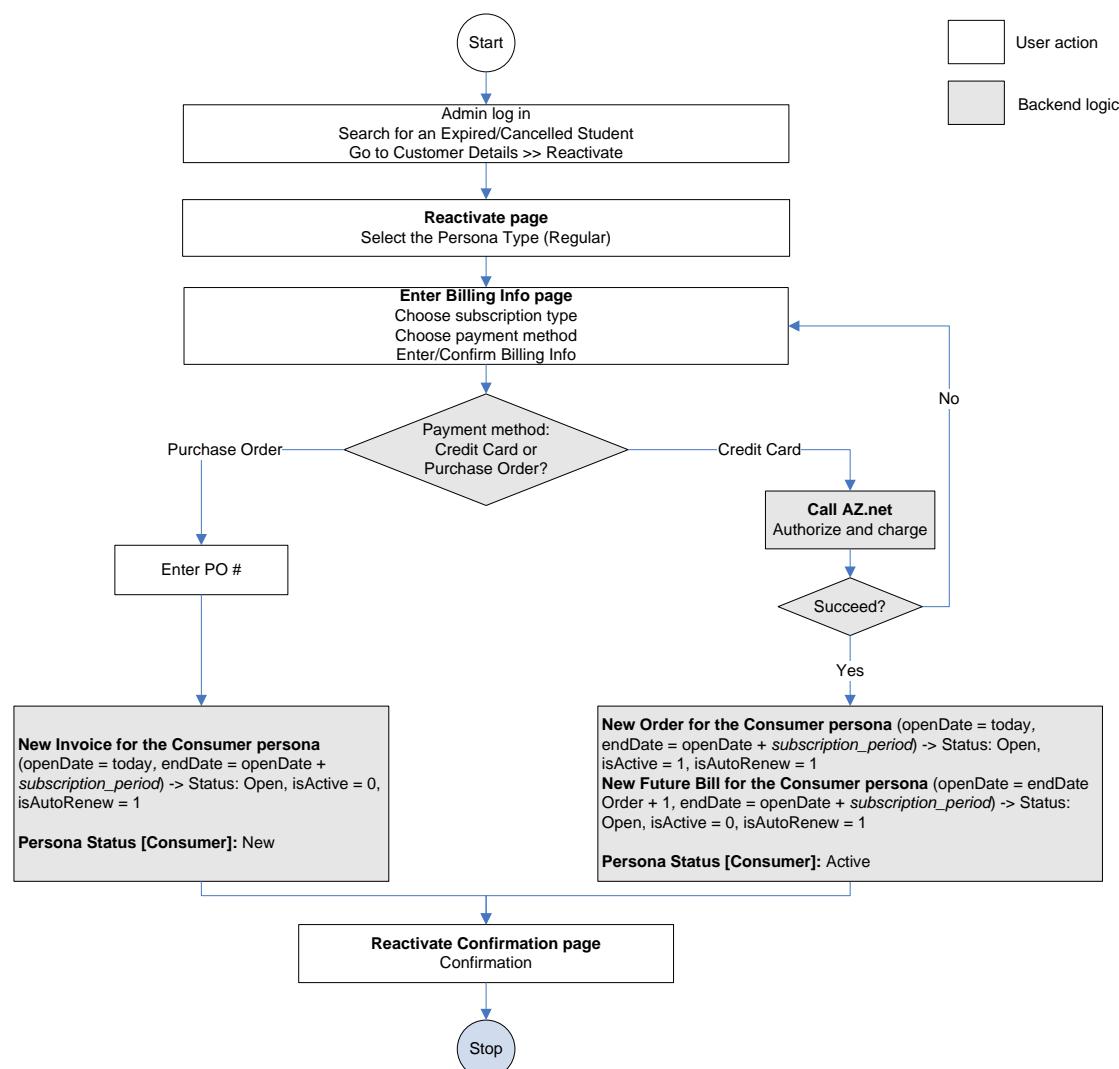
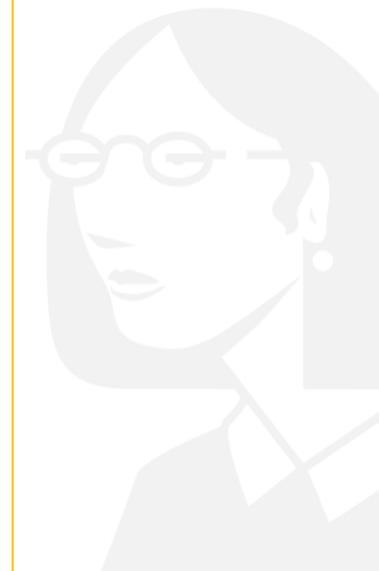


Fig 5.24 Student Reactivate from Admin Site

# 6. lyndaKiosk

## Flows



- Admin site flows

# 6.1 [lyndaKiosk Master Admin] Registration – Admin Site

This flow is followed by Customer Support representatives who set up lyndaKiosk accounts from Admin. This product cannot be purchased from the Public site, there we only offer a brief product description and invite the potential customers to call Customer Support for more details and for setting up an account.

The screenshots illustrate the following steps:

- Step 1: New Account** - A user logs in to the lynda.com admin site and navigates to the 'New Account' section.
- Step 2: Select Person Type** - The user selects 'Regular' as the account type.
- Step 3: LyndaKiosk Sign Up: 1 of 4 - Create your account** - The user enters account information: First Name (ada), Last Name (m), Position (admin), Company/Org. Name (yy), Phone number (12345), Email (email@profession.org), and Email (contac...). They also choose a password and confirm it.
- Step 4: LyndaKiosk Sign Up: 2 of 4 - Enter # of Concurrent Licenses** - The user enters the required number of concurrent licenses (100).
- Step 5: LyndaKiosk Sign Up: 3 of 4 - Select Payment Method** - The user selects a payment method (Credit Card) and enters billing information: Country (Romania), First Name (ada), Last Name (m), Company/Org. Name (yy), Address, Apt/Suite, City, State/Province, Zip/Postal Code, and Phone (12345). They also enter credit card details: Card Holder Name (ada m), Card Type (Visa), Card Number (\*\*\*\*1111), Name on Card (ada m), Credit Card Security Code (\*\*\*\*), and Expiration Date (09/2011).
- Step 6: LyndaKiosk Sign Up: 4 of 4 - Review and Submit Order** - The user reviews the order summary: Product Description (LyndaKiosk membership), # Concurrent Licences (100), Amount Per License (\$50.00), and Total Amount (\$5,000.00). They then click 'Submit'.
- Step 7: LyndaKiosk Sign Up: Complete** - The user receives a confirmation message: "You have successfully created an lyndaKiosk account for ada m for 100 number of concurrent licenses. The credit card was successfully charged with \$5000." The user is then prompted to enter their IP address.

Fig 6.1 [Admin Site] lyndaKiosk Master Admin Registration

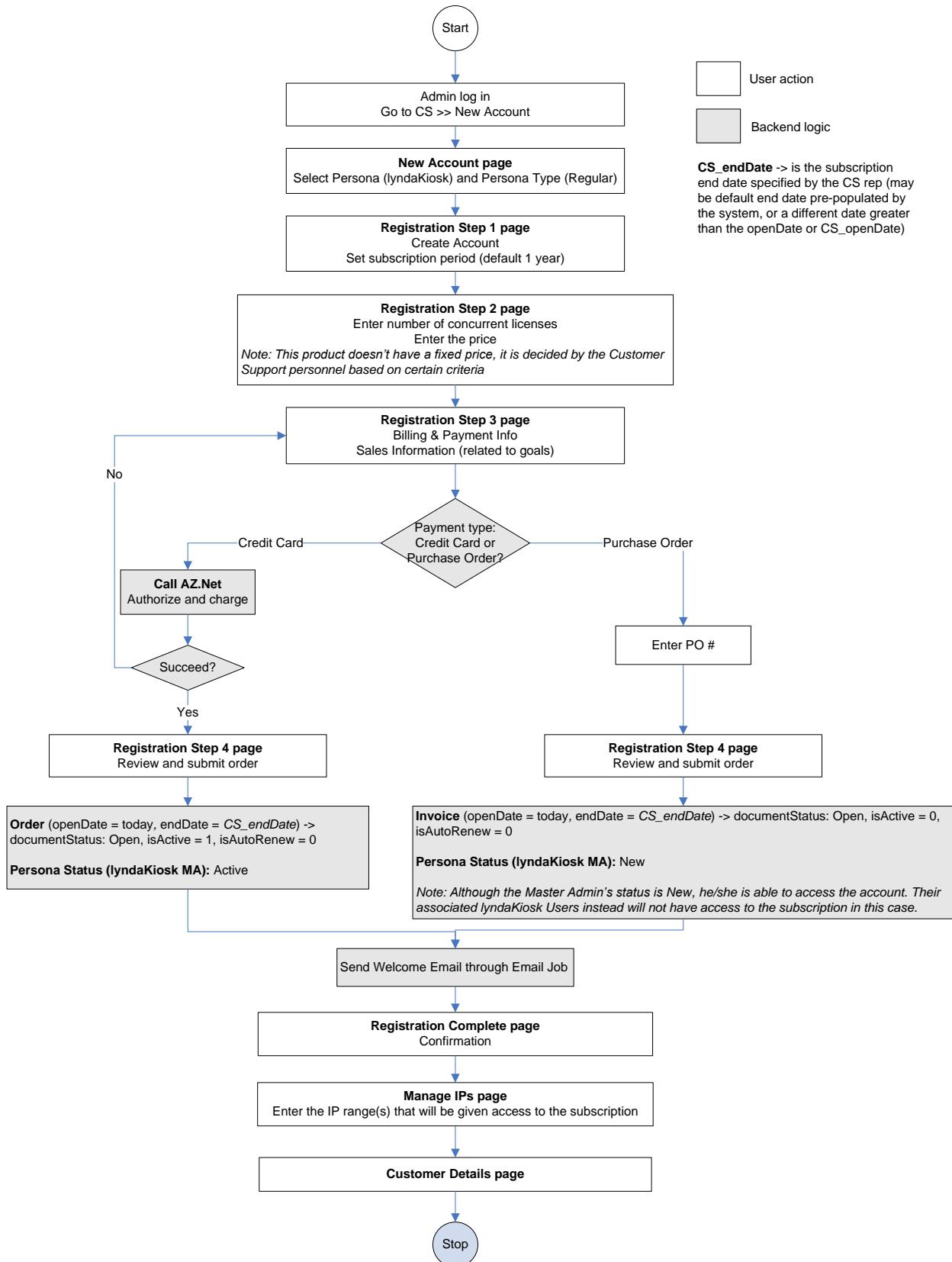


Fig 6.2 lyndaKiosk Master Admin Registration from Admin Site

## 6.2 [lyndaKiosk Master Admin] Complimentary Account – Admin Site

This flow is followed by Customer Support representatives who create lyndaKiosk complimentary (free) accounts. In this case the lyndaKiosk Master Admin's persona type will be complimentary.

Note: For the visual step-by-step flow, please check the [lyndaKiosk Master Admin Registration – Admin Site](#), which is similar.

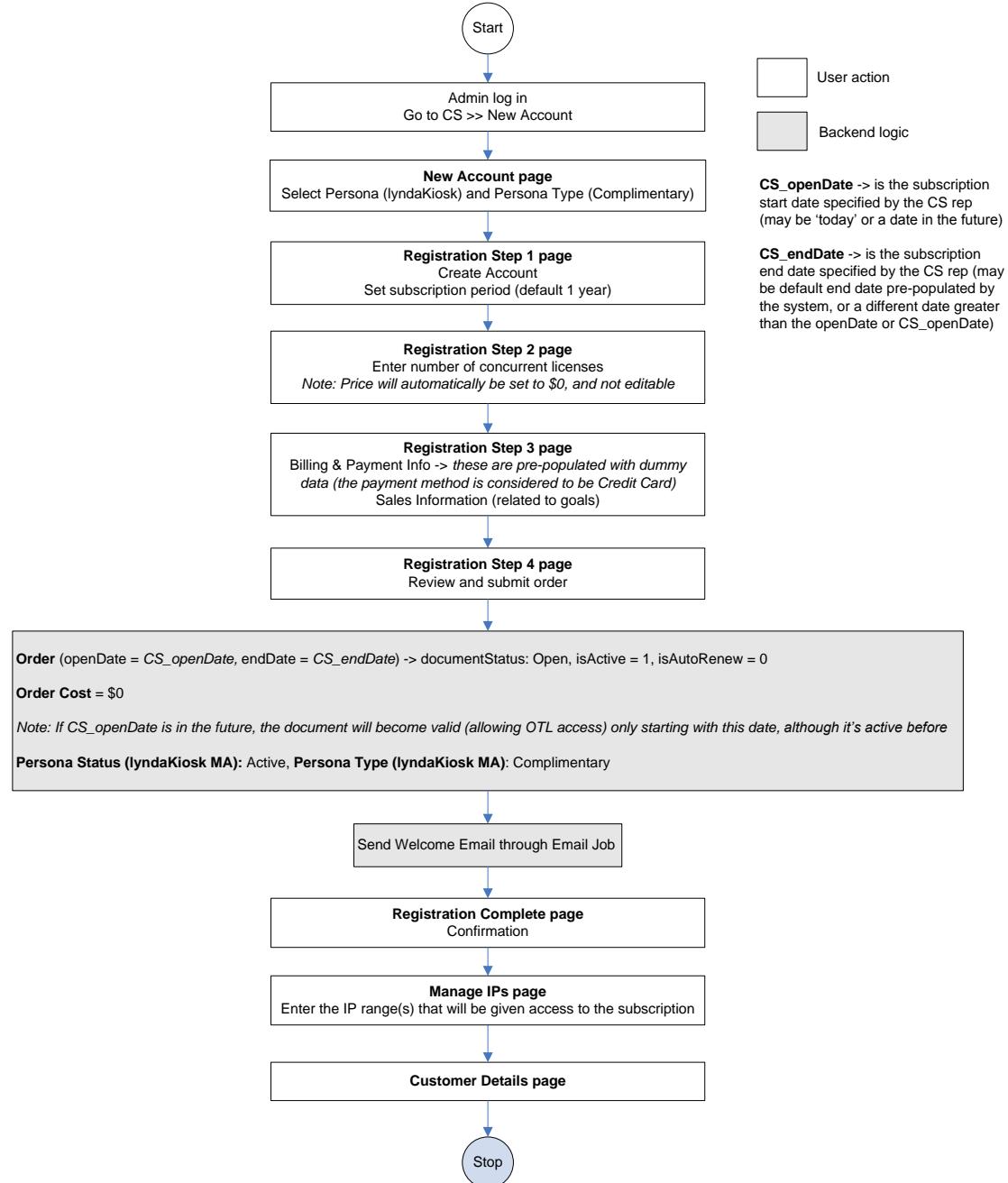


Fig 6.3 lyndaKiosk Master Admin Complimentary Account from Admin Site

## 6.3 [lyndaKiosk Master Admin] Comp Extension – Admin Site

This flow is followed by Customer Support representatives who decide to grant a given lyndaKiosk Master Admin a free extension to their account. This can also go the other way around, the Customer Support representative being able to reduce the current subscription period. In order for an account to be eligible for comp extension, it needs to have at least 1 active document associated.

Note: For the visual step-by-step flow, please check the [Consumer Comp Extension – Admin Site](#), which is similar.

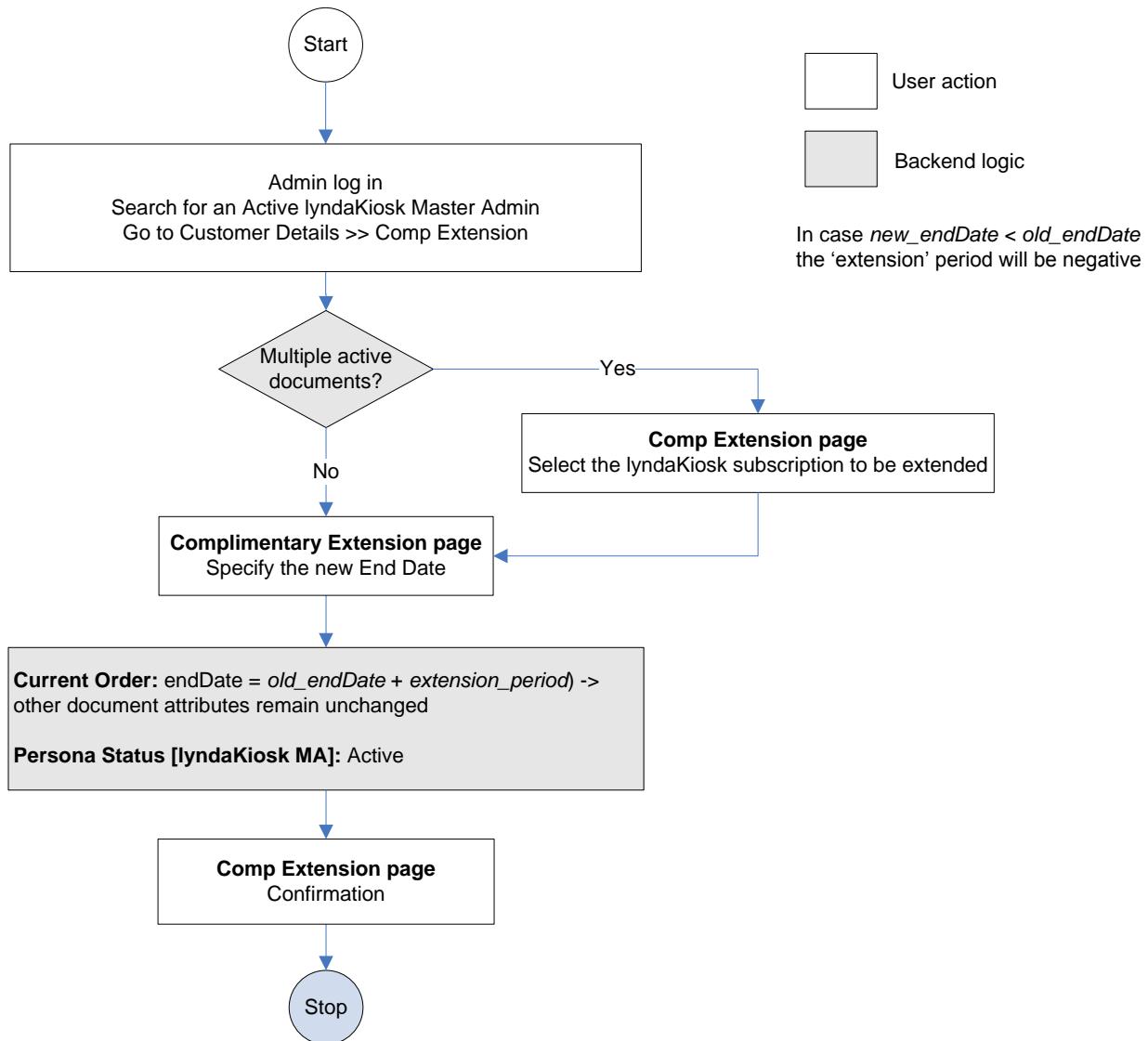


Fig 6.4 lyndaKiosk Master Admin Comp Extension from Admin Site

## 6.4 [lyndaKiosk Master Admin] Apply Payment to Invoice – Admin Site

This flow is followed by Customer Support representatives who confirm partial or full payment of unpaid or partially paid Invoices coming from a lyndaKiosk Master Admin.

Note: For the visual flow, please see the [Apply Payment to Invoice](#) corresponding to Consumers, which is similar.

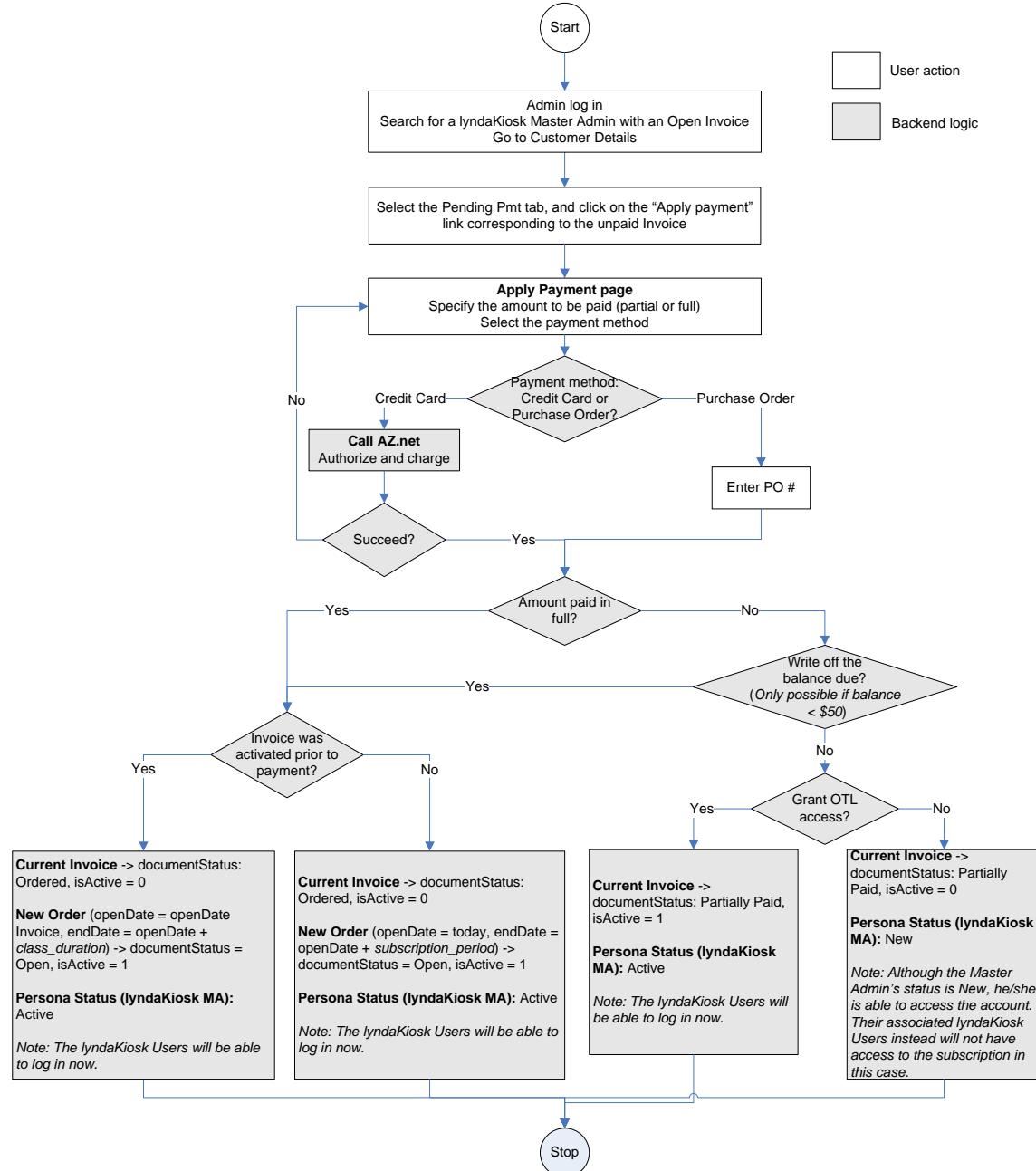


Fig 6.5 Apply Payment to Invoice (lyndaKiosk Master Admin) from Admin Site

## **6.5 [lyndaKiosk Master Admin] Purchase More (New Quote) – Admin Site**

This flow is followed by Customer Support representatives who got a request of purchasing extra concurrent licenses for a lyndaKiosk Master Admin. In this case, the end date of the document created for the extra licenses will be set by default (and cannot be changed) to the same endDate as the current active document.

Note: Note: For the visual flow of Quote creation, please check the [Consumer Upgrade \(New Quote\) – Admin Site](#), which is similar. As far as the Quote invoicing goes, this is similar to the [lyndaKiosk Master Admin Registration](#). For the diagram, please scroll down a few pages.

## **6.6 [lyndaKiosk Master Admin] Renew Membership (New Quote) – Admin Site**

This flow is followed by Customer Support representatives who renew the membership of a lyndaKiosk Master Admin. In this case, the open date of the document created for the renewal period will be set by default (and cannot be changed) to the end date + 1 of the current subscription period (current active document).

Note: Note: For the visual flow of Quote creation, please check the [Consumer Upgrade \(New Quote\) – Admin Site](#), which is similar. As far as the Quote invoicing goes, this is similar to the [lyndaKiosk Master Admin Registration](#). For the diagram, please scroll down a few pages.

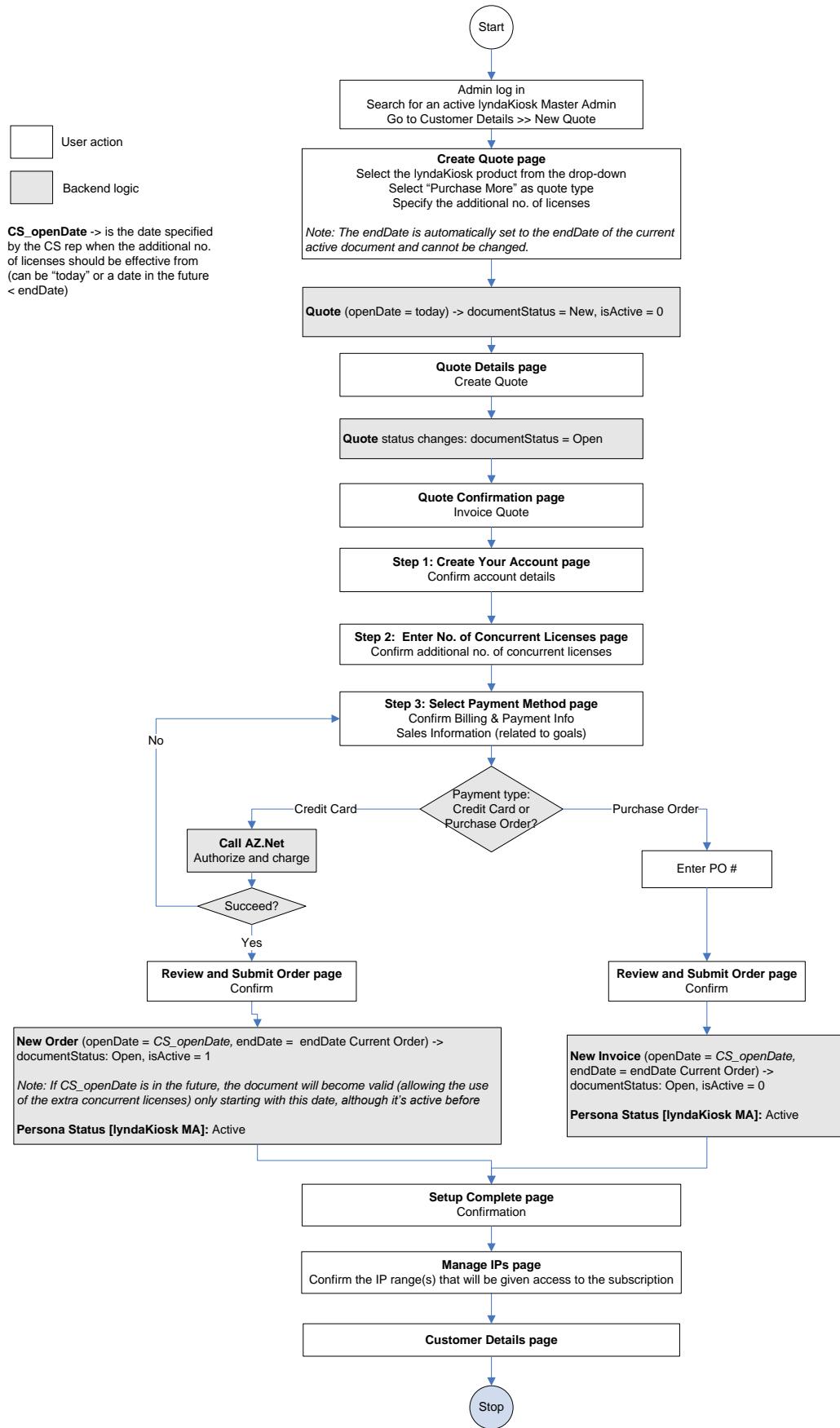


Fig 6.6 lyndaKiosk Master Admin Purchase More (New Quote) from Admin Site

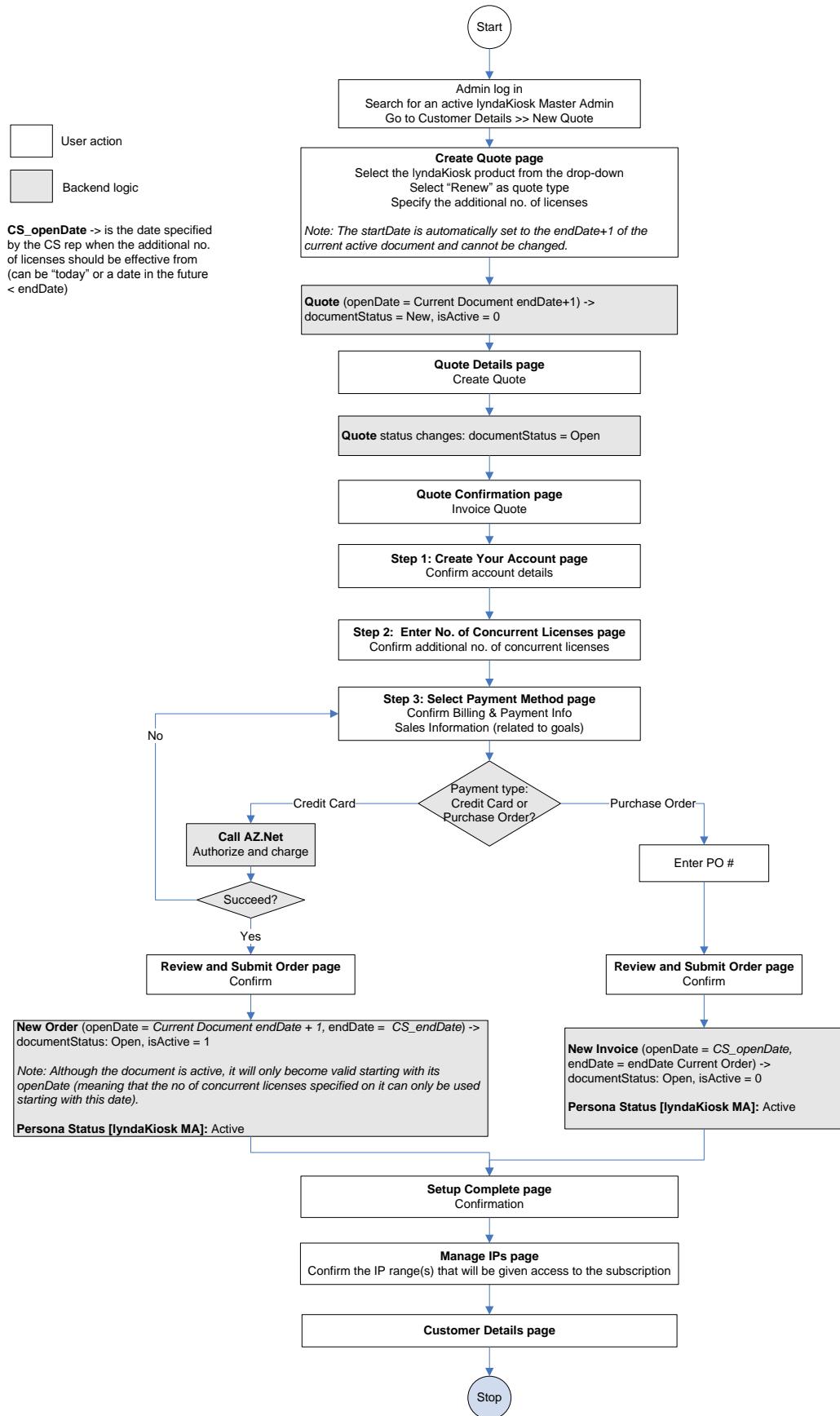


Fig 6.7 Renew lyndaKiosk Master Admin Membership (New Quote) from Admin Site

## **6.7 [lyndaKiosk Master Admin] Cancel Membership (Cancel Order) – Admin Site**

This flow is followed by Customer Support representatives who cancel a lyndaKiosk Master Admin's subscription due to abusive behavior, or at the customer's request. Cancel may or may not be accompanied by a refund (partial or full), and the Customer Support representative is given the possibility to leave the OTL access until the current document expires, or to remove it from the lyndaKiosk Master Admin (and implicitly his/her lyndaKiosk Users) starting with the cancellation moment.

Using this same flow, the Customer Support representative can just offer a refund to the lyndaKiosk Master Admin (partial or full, without exceeding the amount paid) without cancelling their account. Or it's possible to set the lyndaKiosk Master Admin as abusive, in which case the current documents remain untouched, but the user is prevented from logging into the account (in this case the lyndaKiosk Users are not affected, they being able to log in).

Note: For the visual flow, please check the [Cancel Consumer Membership \(Cancel Order\)](#), which is similar. For the diagram, please scroll down a few pages.

## **6.8 [lyndaKiosk Master Admin] Cancel Membership (Cancel Invoice) – Admin Site**

This flow is followed by Customer Support representatives who need to cancel a lyndaKiosk Master Admin's account due to failure in applying payment to purchase orders in due time, abusive behavior, or at the customer's request. Cancel may or may not be accompanied by a refund (partial or full), and the Customer Support representative is given the possibility to leave the OTL access (in case the invoice was prior activated) until the current document expires, or to remove it from the lyndaKiosk Master Admin (and implicitly his/her lyndaKiosk Users) starting with the cancellation moment.

Using this same flow, the Customer Support representative can just offer a refund to the lyndaKiosk Master Admin (partial or full) without cancelling their account -> the refund cannot exceed the amount paid though.

Note: For the visual flow, please check the [Cancel Consumer Membership \(Cancel Invoice\)](#), which is similar. For the diagram, please scroll down a few pages.

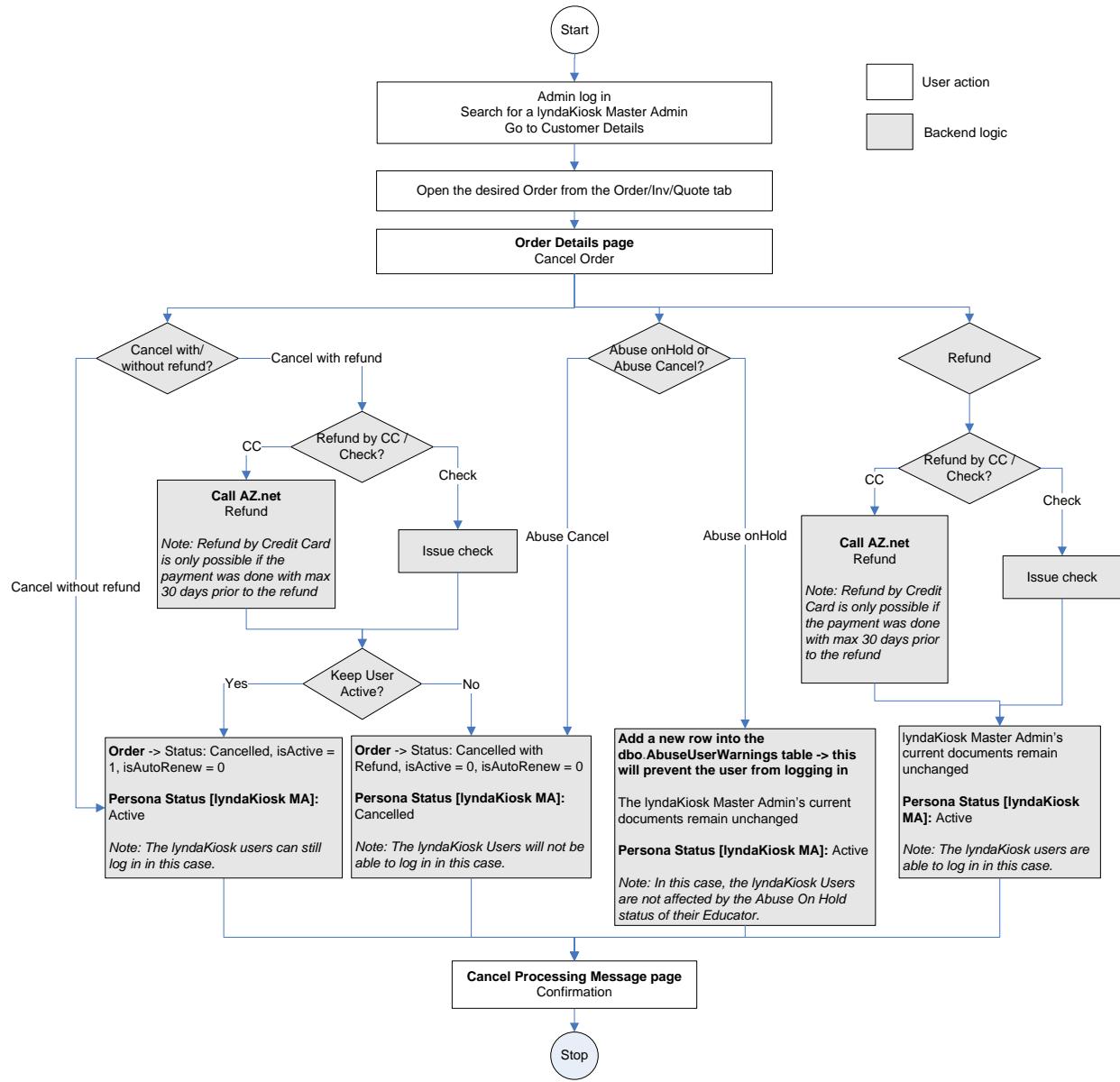


Fig 6.8 Cancel lyndaKiosk Master Admin Membership (Cancel Order) from Admin Site

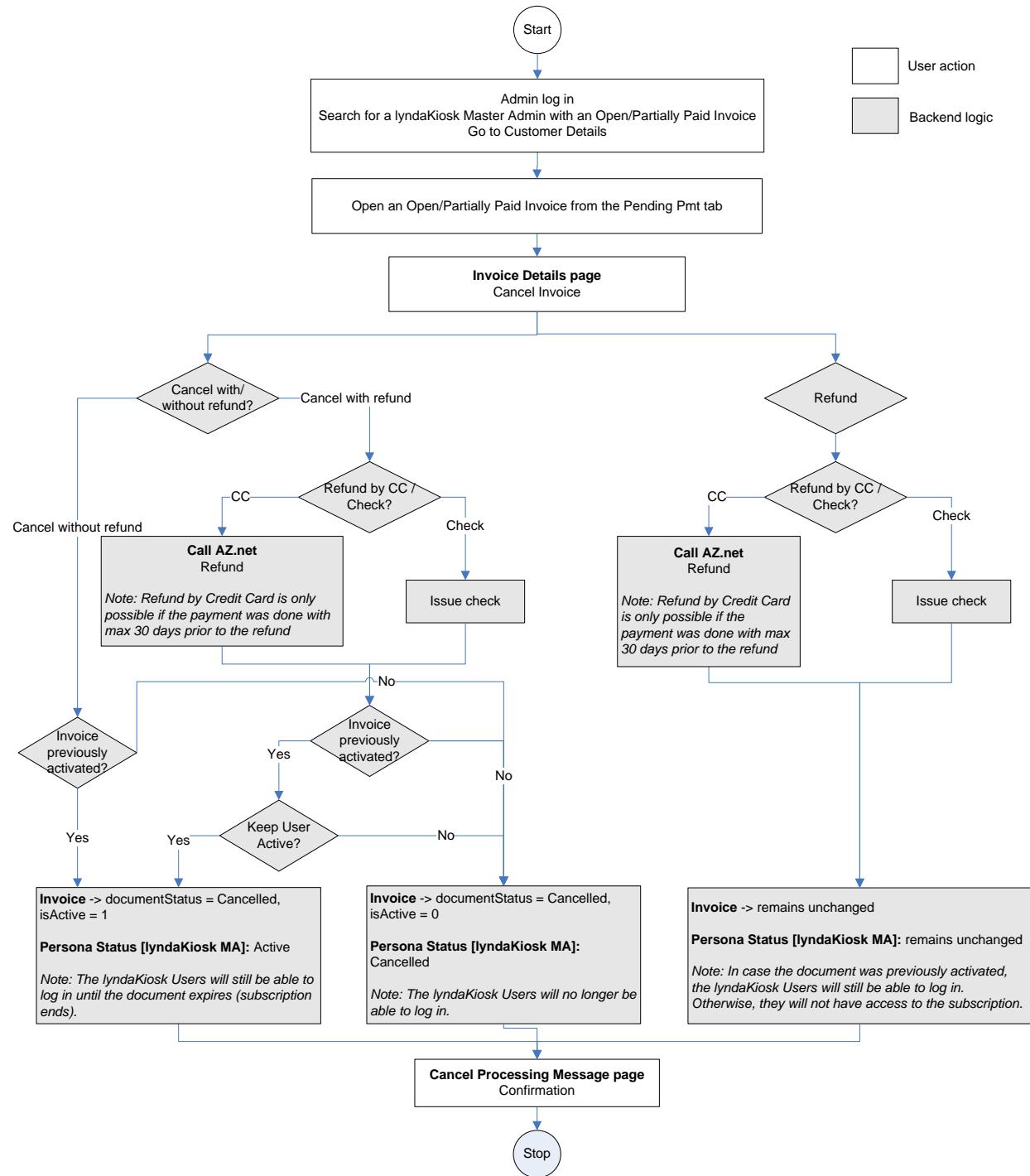


Fig 6.9 Cancel lyndaKiosk Master Admin Membership (Cancel Invoice) from Admin Site

## **6.9 [lyndaKiosk Master Admin] Grant OTL Access (Activate Invoice) – Admin Site**

This flow is followed by Customer Support representatives who decide to grant OTL access to a lyndaKiosk Master Admin having an active (unpaid, or partially paid) Invoice (indicating that the selected payment method was Purchase Order). This means that his/her associated lyndaKiosk Users will be able to log in and access the site content.

Note: For the step-by-step flow presented both in images and as a diagram, please see the [Grant OTL Access \(Activate Invoice\)](#) corresponding to Consumers, which is similar.

## **6.10 [lyndaKiosk Master Admin] Upgrade to lyndaPro – Admin Site**

This flow is followed by Customer Support representatives who upgrade a lyndaKiosk Master Admin's membership from a lyndaKiosk subscription to a lyndaPro subscription. This action will not affect this customer's lyndaKiosk membership, it will simply associate a new product (lyndaPro) to the Master Admin persona -> it will not add a new persona to the account, since the Master Admin persona is shared among several corporate products (lyndaPro, lyndaKiosk, lyndaCampus).

This is the only action besides creating brand new accounts that can be performed from the Admin site without the help of New Quotes.

Note: For the visual flow, please check the [Consumer Upgrade to lyndaPro](#), which is similar.

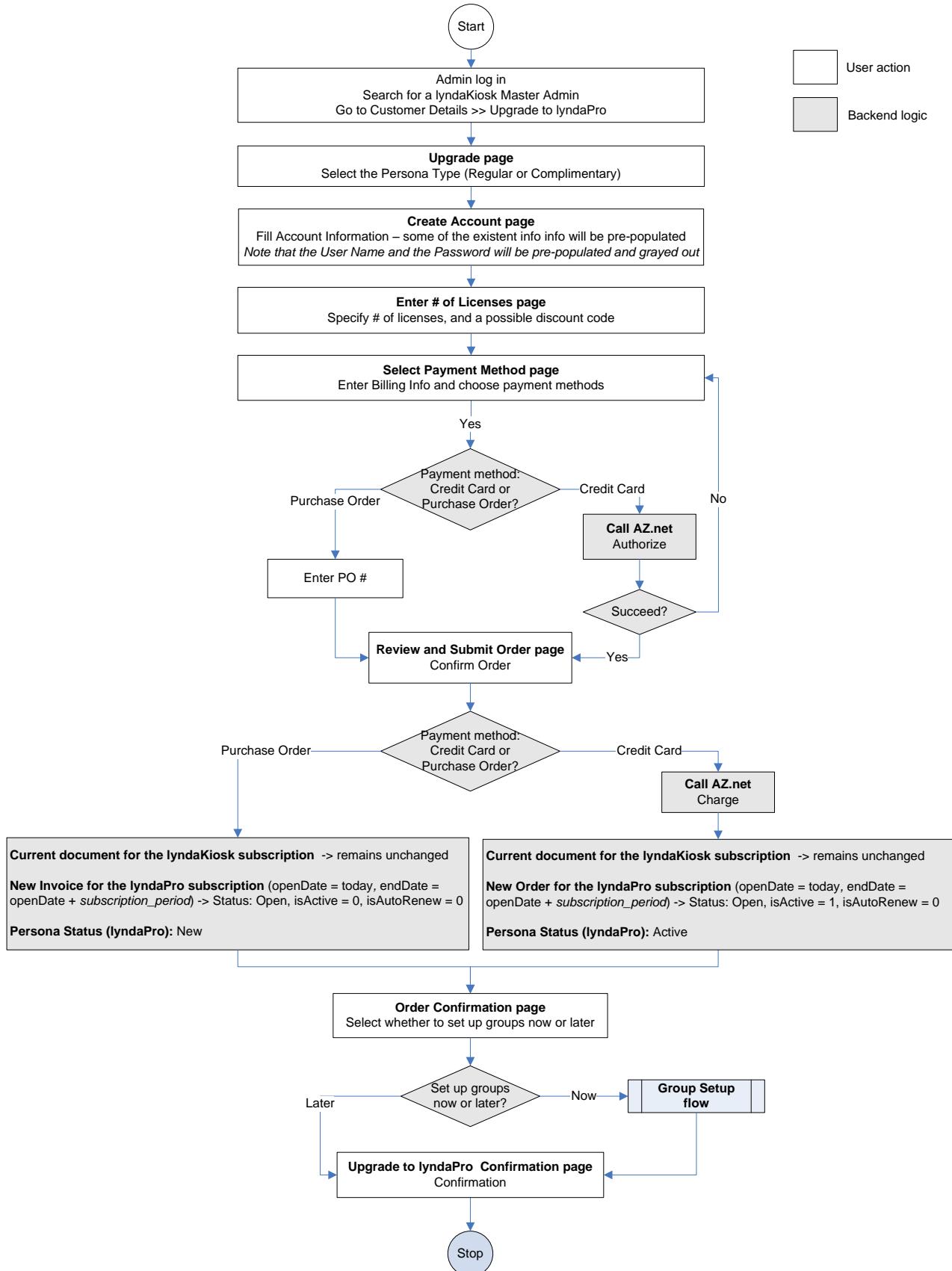


Fig 6.10 lyndaKiosk Master Admin Upgrade to lyndaPro from Admin Site

## **6.11 [lyndaKiosk Master Admin] Add Additional Persona (New Quote) – Admin Site**

This flow is followed by Customer Support representatives who make an offer for a different product than lyndaKiosk to a lyndaKiosk Master Admin. Just like in the case of Upgrade to lyndaPro flow, the current persona (lyndaKiosk Master Admin) is not affected – the system simply adds another persona to the account, corresponding to the product selected in the Quote.

Note: For the visual flow, please check the [Consumer Upgrade \(New Quote\) – Admin Site](#), which is similar (the quote creation flow is the same, but the invoice quote flow might differ, depending on the product selected in the Quote). For the diagram, please check the [Additional Persona \(New Quote\) for lyndaPro](#), which is similar.

# 7. lyndaCampus

## Flows



- Public site flows
- Admin site flows

# 7.1 [lyndaCampus Master Admin] Registration – Admin Site

This flow is followed by Customer Support representatives who set up lyndaCampus accounts from Admin. This product cannot be purchased from the Public site, there we only offer a brief product description and invite the potential customers to call Customer Support for more details and for setting up an account.

**Step 1: New Account**

The user selects 'lyndaCampus admin' as the account type and continues.

**Step 2: Create your account**

The user fills out account information (Country: Romania, First Name: Ada, Last Name: M, Position/Title: admin, Department: SV, Company/Org. Name: SV, Phone number: 12345, Email: amano@softvision.ro, Email (confirm): amano@softvision.ro, Choose Username: adacampus, Choose Password: \*\*\*\*\*, Password (confirm): \*\*\*\*\*) and agrees to terms.

**Step 3: Enter # of FTEs to Purchase**

The user enters 600 FTEs and continues.

**Step 4: Enter # of Licenses**

The user enters 1 license and continues.

**Step 5: Select Payment Method**

The user selects 'Credit Card' as the payment type and provides billing information (Country: Romania, First Name: Ada, Last Name: M, Company/Org. Name: SV, Address: Ro, Apt/Suite: , City: Cj, State/Province: , Zip/Postal Code: , Phone: 12345). A note about AVS (Address Verification System) is displayed.

**Step 6: Order Confirmation**

The user receives confirmation of a \$12,500.00 charge for 600 FTEs for 366 days, with a link to 'Review and Submit Order'.

Fig 7.1 [Admin Site] lyndaCampus Master Admin Registration

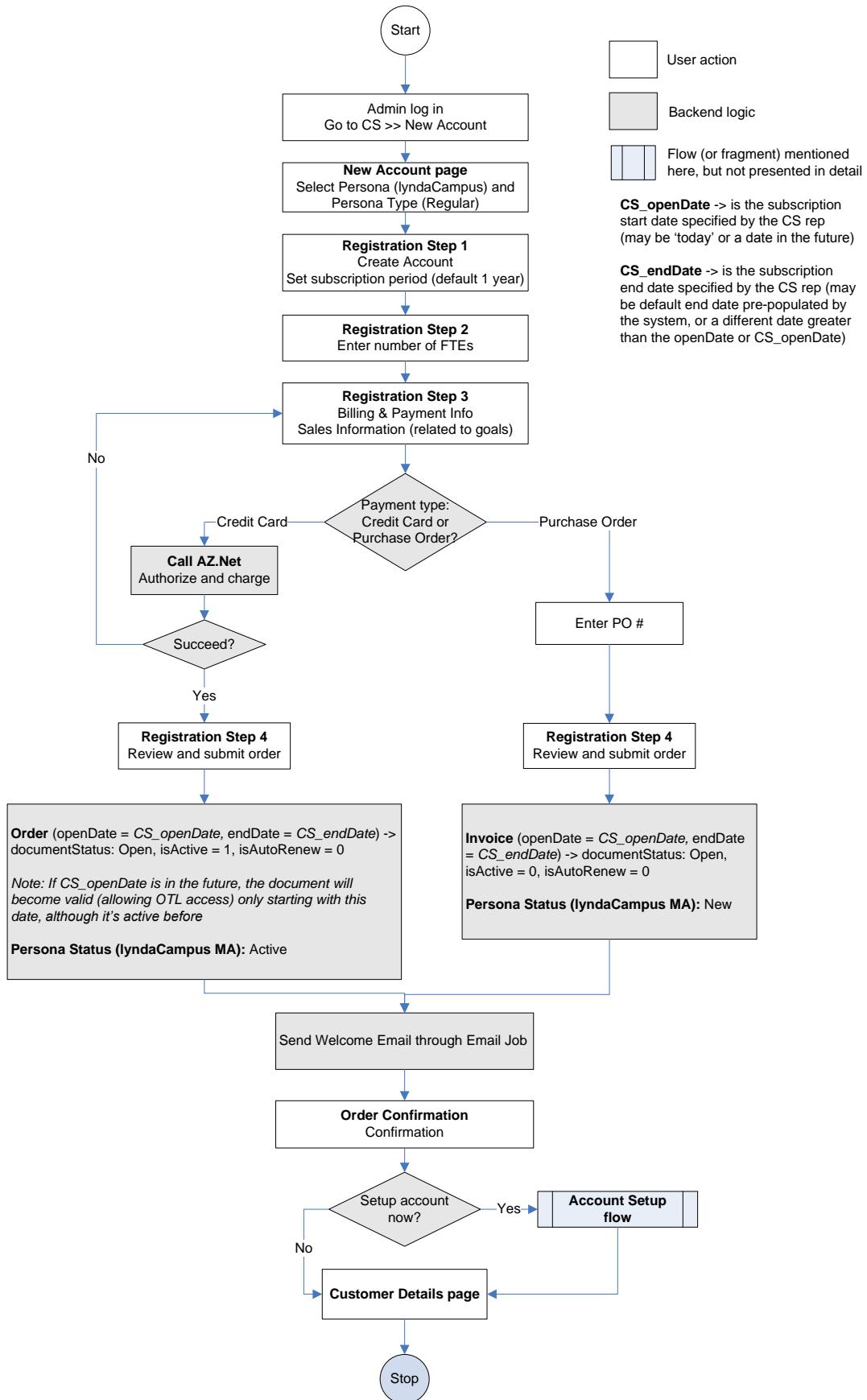


Fig 7.2 lyndaCampus Master Admin Registration from Admin Site

Presenting separately the Account Setup flow:

**lyndaCampus Account Setup: 1 of 4 - Enter IP Addresses**

	From IP Address	To IP Address	Notes
1	10.250.2.93	10.250.2.93	
2	188.27.135.6	188.27.135.6	
3			
4			
5			

More IP Addresses

← 1 → 2

Next: Specify Permissions

**lyndaCampus Account Setup: 4 of 4 - Set user default newsletter settings**

Specify which newsletters, if any, the account administrator would like their users to receive. The lyndaCampus User will have the option to change their preferences from their account.

**Newsletter Subscriptions**

Please use the buttons below to subscribe/unsubscribe from lynda.com newsletters:

Subscribe	Unsubscribe	
<input type="radio"/>	<input checked="" type="radio"/>	More information on lynda.com newsletters
<input type="radio"/>	<input checked="" type="radio"/>	Monthly Newsletter

← back Previous: Default Greeting

Next: Customer Details

**lyndaCampus Account Setup: 2 of 4 - Specify Data Permissions (For Authenticated Accounts Only, Shibboleth or Other)**

If the client will authenticate with lynda.com, indicate which data is allowed to be stored in the lynda.com database, displayed on the lynda.com website, used for reporting or to send lynda.com communications. A selection of Yes indicates the client has approved the use of the data. You can bypass this step if the client will not authenticate prior to arriving at lynda.com or will not pass data.

**Specify data permissions**

**Customer Approves Use of Data**

	Yes	No
User First Name:	<input checked="" type="radio"/>	<input type="radio"/>
User Full Name:	<input checked="" type="radio"/>	<input type="radio"/>
User Email Address for Display on Website:	<input checked="" type="radio"/>	<input type="radio"/>
User Email Address for lynda.com Email Communications:	<input checked="" type="radio"/>	<input type="radio"/>
User Type (Student vs. Faculty):	<input type="radio"/>	<input checked="" type="radio"/>
Campus Affiliation:	<input type="radio"/>	<input checked="" type="radio"/>
Department:	<input type="radio"/>	<input checked="" type="radio"/>
Administrative Area:	<input type="radio"/>	<input checked="" type="radio"/>

← back Previous: IP Addresses

→ approve Next: Enter Default Name

**lyndaCampus Account Setup: 3 of 4 - Enter default greeting**

If the client will authenticate with lynda.com and the IP User name is not available, enter the name the client would like to appear in the login box, and following the Welcome Back greeting on My Recent Activity page.

**Enter Default Greeting**

Enter Name: Dear user

← back Previous: Data Permissions

Next: Newsletter Preferences

Fig 7.3 [Admin Site] lyndaCampus Master Admin Account Setup

## 7.2 [lyndaCampus Master Admin] Complimentary Account – Admin Site

This flow is followed by Customer Support representatives who create lyndaCampus complimentary (free) accounts. In this case the lyndaCampus Master Admin's persona type will be complimentary, but the associated lyndaCampus Users will always be Regular.

Note: For the visual step-by-step flow, please check the [lyndaCampus Master Admin Registration – Admin Site](#), which is similar.

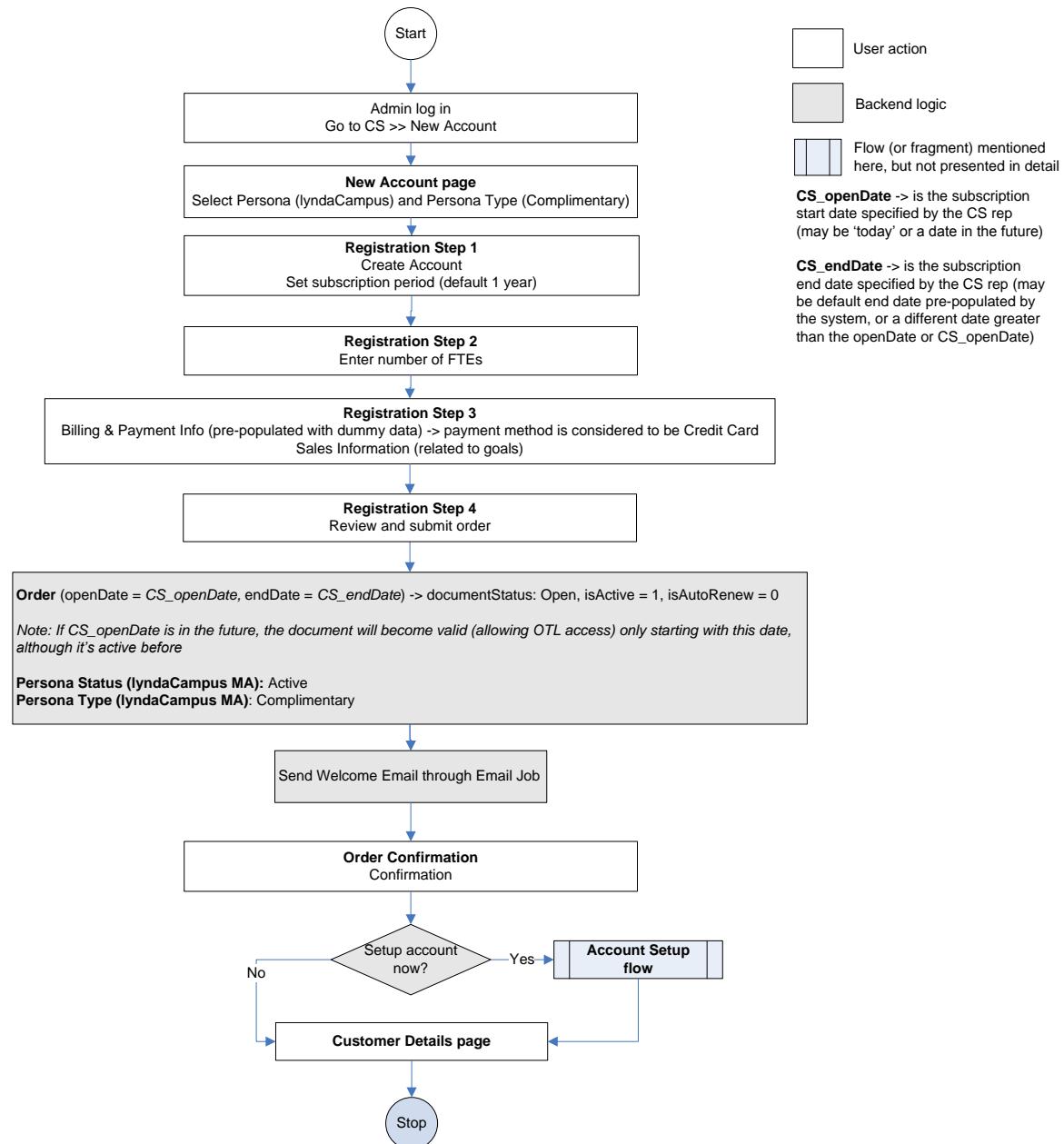


Fig 7.4 lyndaCampus Master Admin Complimentary Account from Admin Site

## 7.3 [lyndaCampus Master Admin] Comp Extension – Admin Site

This flow is followed by Customer Support representatives who decide to grant a given lyndaCampus Master Admin a free extension to their account. This can also go the other way around, the Customer Support representative being able to reduce the current subscription period. In order for an account to be eligible for comp extension, it needs to have at least 1 active document associated.

Note: For the visual step-by-step flow, please check the [Consumer Comp Extension – Admin Site](#), which is similar.

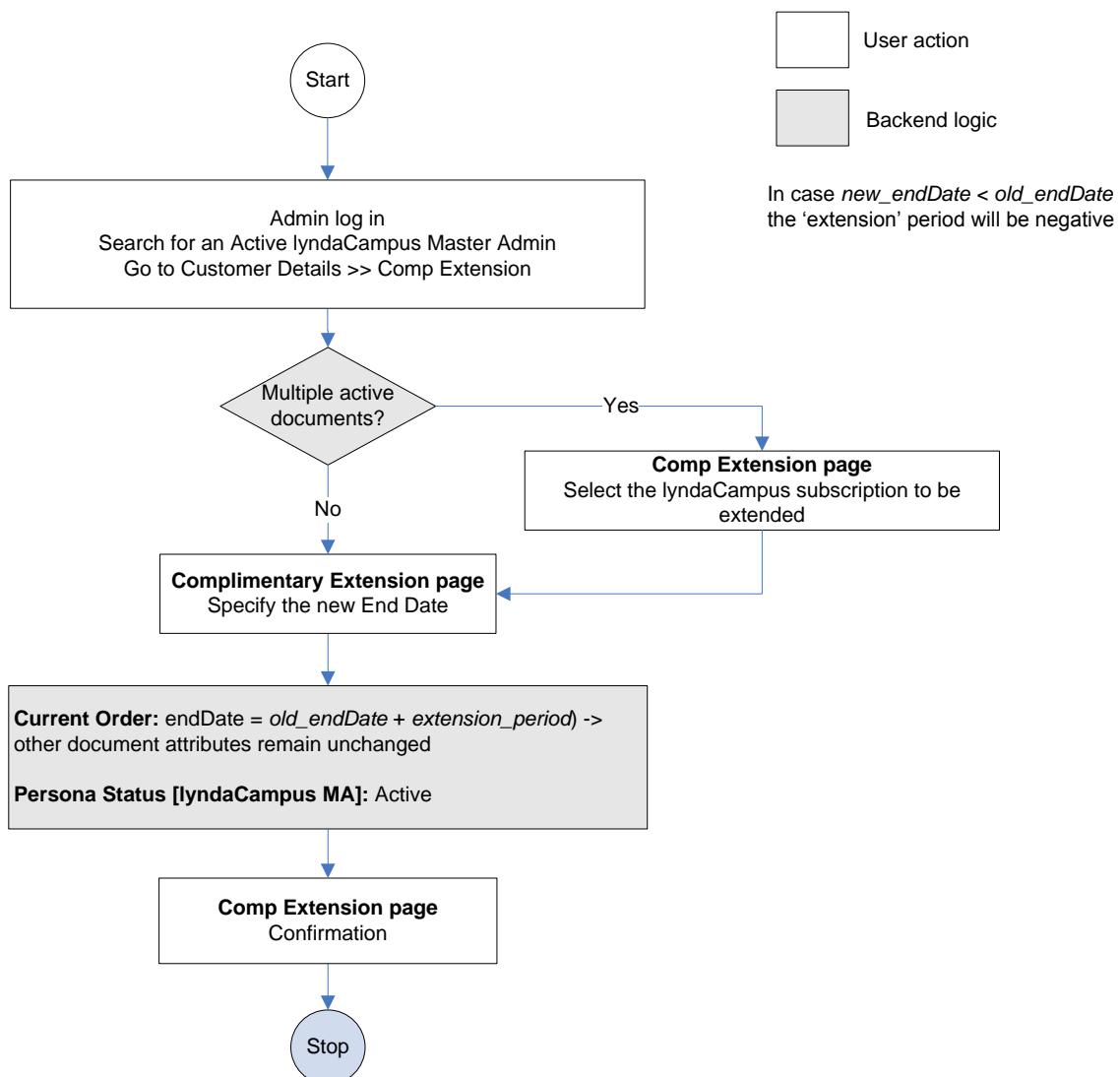


Fig 7.5 lyndaCampus Master Admin Comp Extension from Admin Site

## 7.4 [lyndaCampus Master Admin] Apply Payment to Invoice – Admin Site

This flow is followed by Customer Support representatives who confirm partial or full payment of unpaid or partially paid Invoices coming from a lyndaCampus Master Admin.

Note: For the visual flow, please see the [Apply Payment to Invoice](#) corresponding to Consumers, which is similar.

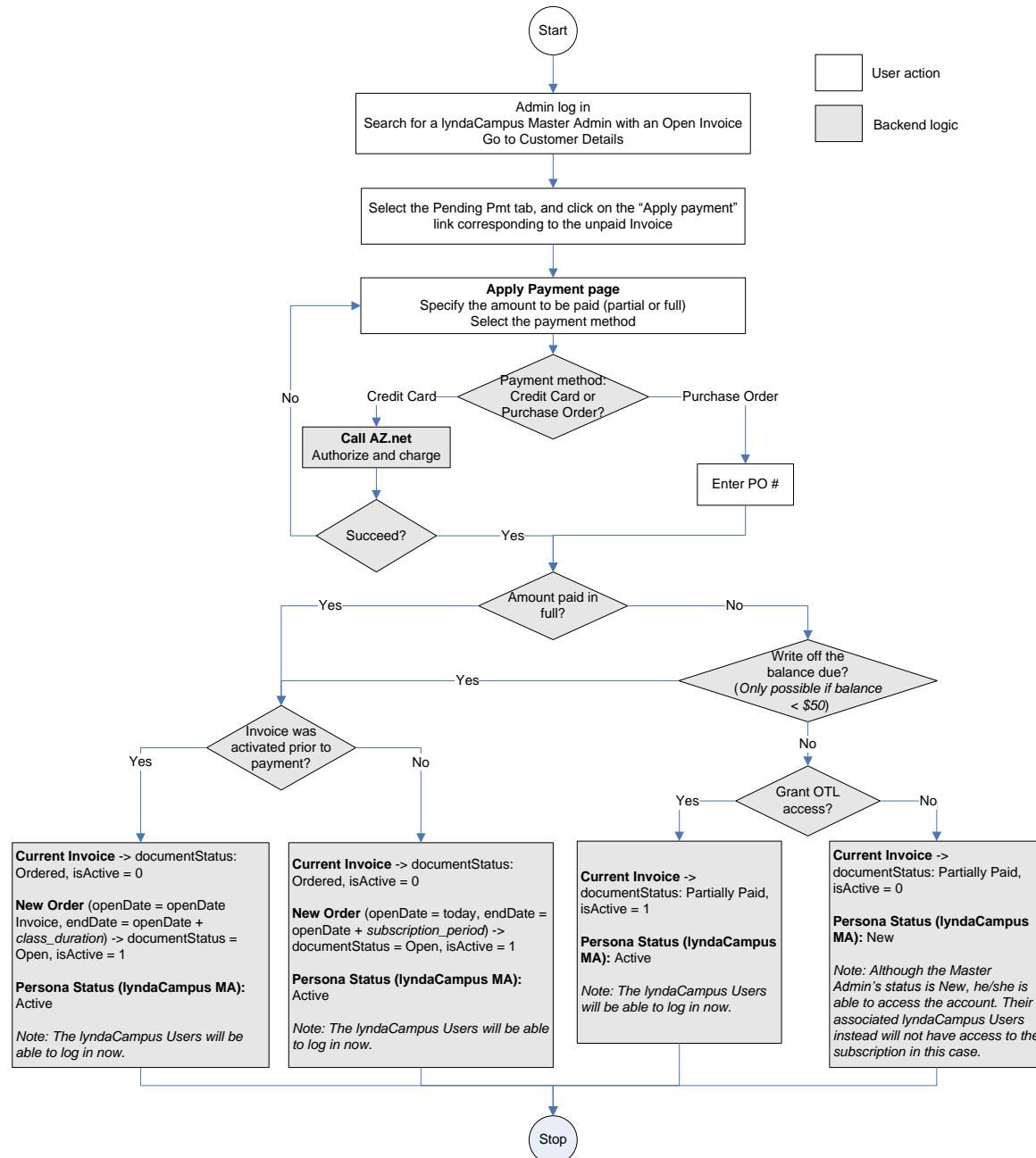


Fig 7.6 lyndaCampus Master Admin Apply Payment to Invoice from Admin Site

## **7.5 [lyndaCampus Master Admin] Purchase More – Admin Site**

This flow is followed by Customer Support representatives who got a request of purchasing extra FTEs for a lyndaCampus Master Admin. In this case, the end date of the document created for the extra licenses will be set by default (and cannot be changed) to the same endDate as the current active document.

Note: Note: For the visual flow of Quote creation, please check the [Consumer Upgrade \(New Quote\) – Admin Site](#), which is similar. As far as the Quote invoicing goes, this is similar to the [lyndaCampus Master Admin Registration](#). For the diagram, please scroll down a few pages.

## **7.6 [lyndaCampus Master Admin] Renew Membership – Admin Site**

This flow is followed by Customer Support representatives who renew the membership of a lyndaCampus Master Admin. In this case, the open date of the document created for the renewal period will be set by default (and cannot be changed) to the end date + 1 of the current subscription period (current active document).

Note: Note: For the visual flow of Quote creation, please check the [Consumer Upgrade \(New Quote\) – Admin Site](#), which is similar. As far as the Quote invoicing goes, this is similar to the [lyndaCampus Master Admin Registration](#). For the diagram, please scroll down a few pages.

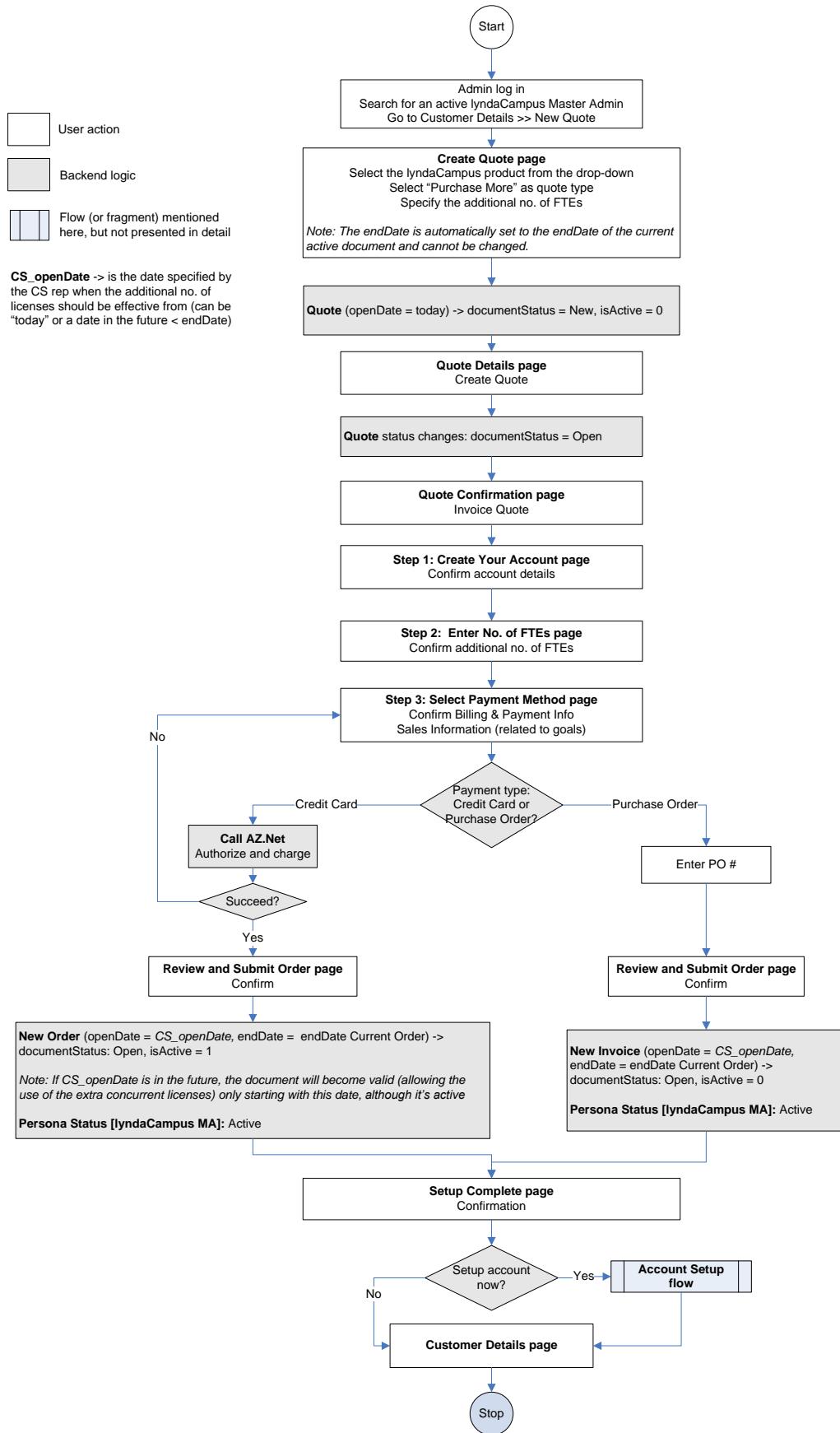


Fig 7.7 lyndaCampus Master Admin Purchase More from Admin Site

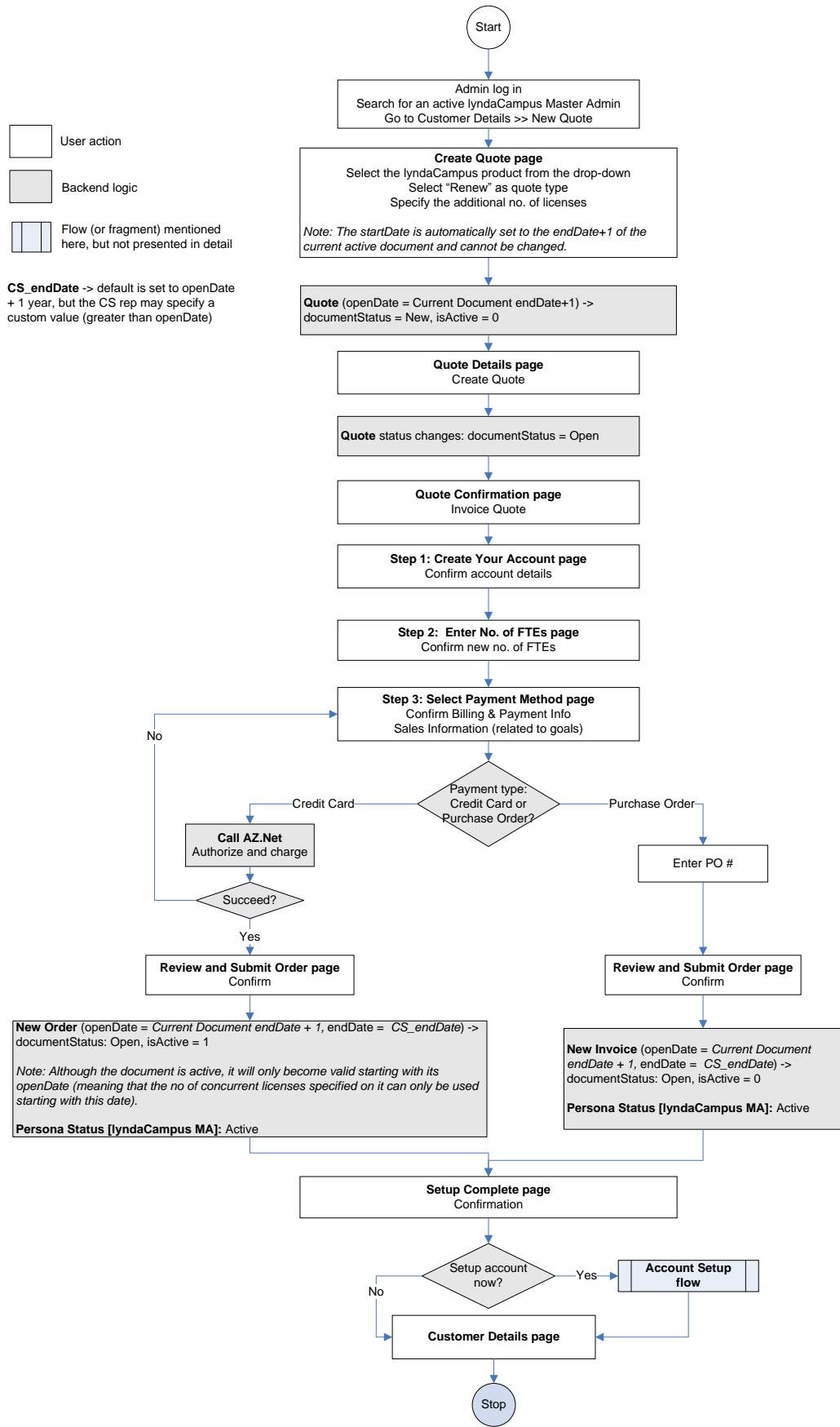


Fig 7.8 lyndaCampus Master Admin Renew from Admin Site

## **7.7 [lyndaCampus Master Admin] Cancel Membership (Cancel Order) – Admin Site**

This flow is followed by Customer Support representatives who cancel a lyndaCampus Master Admin's subscription due to abusive behavior, or at the customer's request. Cancel may or may not be accompanied by a refund (partial or full), and the Customer Support representative is given the possibility to leave the OTL access until the current document expires, or to remove it from the lyndaCampus Master Admin (and implicitly his/her lyndaCampus Users) starting with the cancellation moment.

Using this same flow, the Customer Support representative can just offer a refund to the lyndaCampus Master Admin (partial or full, without exceeding the amount paid) without cancelling their account. Or it's possible to set the lyndaCampus Master Admin as abusive, in which case the current documents remain untouched, but the user is prevented from logging into the account (in this case the lyndaCampus Users are not affected, they being able to log in).

Note: For the visual flow, please check the [Cancel Consumer Membership \(Cancel Order\)](#), which is similar. For the diagram, please scroll down a few pages.

## **7.8 [lyndaCampus Master Admin] Cancel Membership (Cancel Invoice) – Admin Site**

This flow is followed by Customer Support representatives who need to cancel a lyndaCampus Master Admin's account due to failure in applying payment to purchase orders in due time, abusive behavior, or at the customer's request. Cancel may or may not be accompanied by a refund (partial or full), and the Customer Support representative is given the possibility to leave the OTL access (in case the invoice was prior activated) until the current document expires, or to remove it from the lyndaCampus Master Admin (and implicitly his/her lyndaCampus Users) starting with the cancellation moment.

Using this same flow, the Customer Support representative can just offer a refund to the lyndaCampus Master Admin (partial or full) without cancelling their account -> the refund cannot exceed the amount paid though.

Note: For the visual flow, please check the [Cancel Consumer Membership \(Cancel Invoice\)](#), which is similar. For the diagram, please scroll down a few pages.

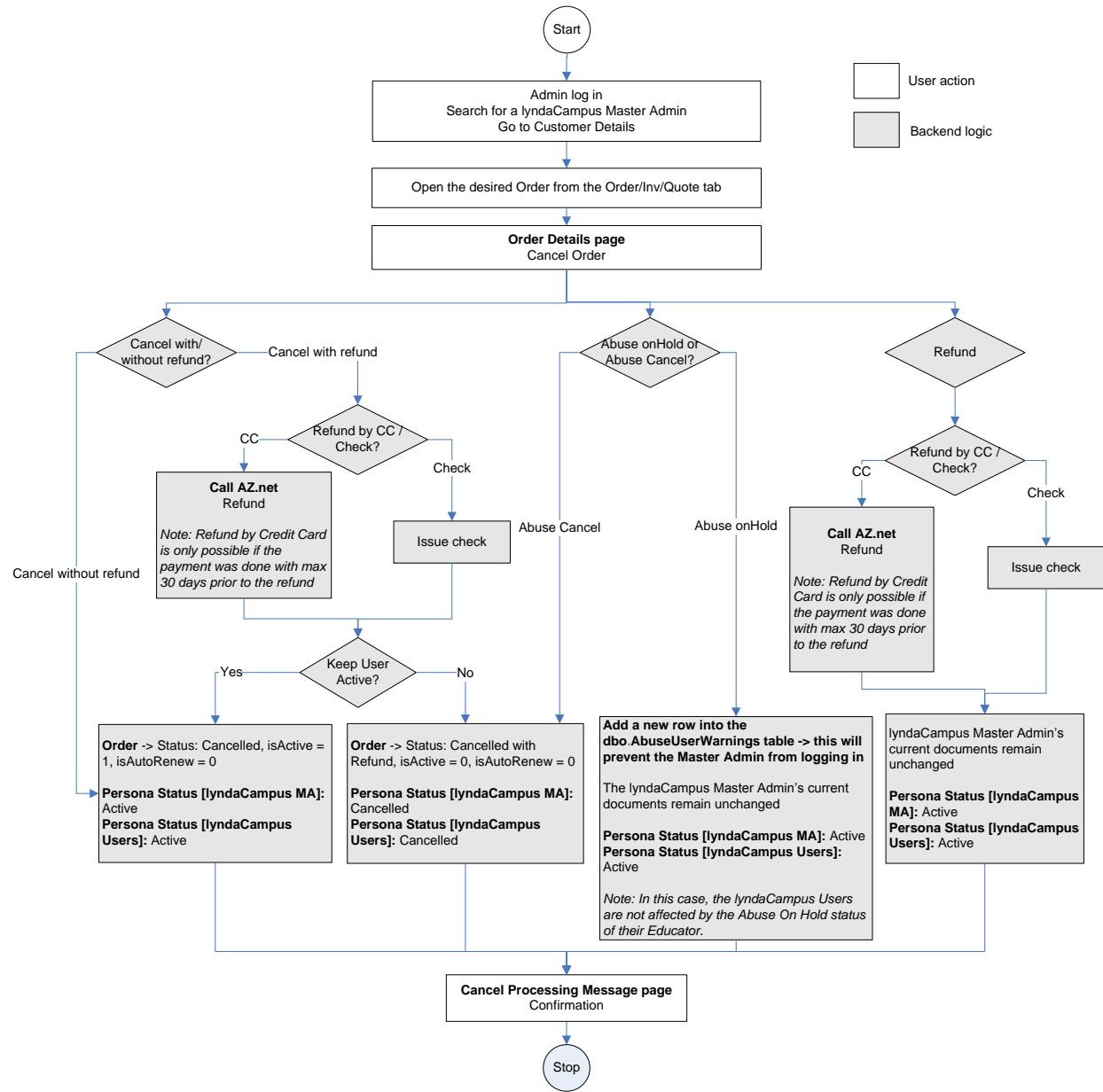


Fig 7.9 lyndaCampus Master Admin Cancel Order from Admin Site

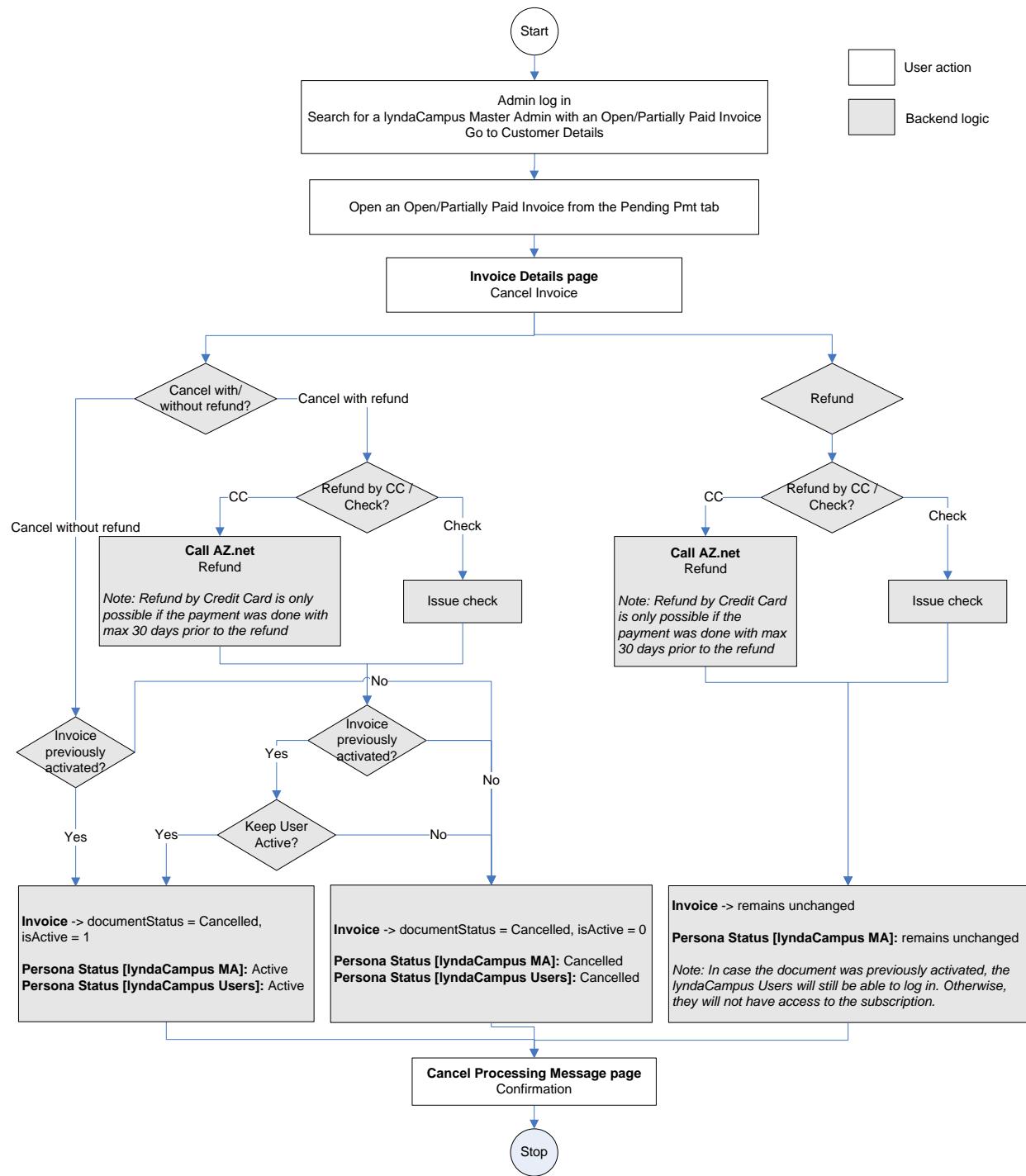


Fig 7.10 lyndaCampus Master Admin Cancel Invoice from Admin Site

## **7.9 [lyndaCampus Master Admin] Grant OTL Access (Activate Invoice) – Admin Site**

This flow is followed by Customer Support representatives who decide to grant OTL access to a lyndaCampus Master Admin having an active (unpaid, or partially paid) Invoice (indicating that the selected payment method was Purchase Order). This means that his/her associated lyndaCampus Users will be able to log in and access the site content.

Note: For the step-by-step flow presented both in images and as a diagram, please see the [Grant OTL Access \(Activate Invoice\)](#) corresponding to Consumers, which is similar.

## **7.10 [lyndaCampus Master Admin / lyndaCampus User] Add Additional Persona (New Quote) – Admin Site**

This flow is followed by Customer Support representatives who make an offer for a different product than lyndaCampus to a lyndaCampus Master Admin or to a lyndaCampus User. The current persona (lyndaCampus Master Admin / lyndaCampus User) is not affected in this case – the system simply adds another persona to the account, corresponding to the product selected in the Quote.

Note: For the visual flow, please check the [Consumer Upgrade \(New Quote\) – Admin Site](#), which is similar (the quote creation flow is the same, but the invoice quote flow might differ, depending on the product selected in the Quote). For the diagram, please check the [Additional Persona \(New Quote\) for lyndaPro](#), which is similar.

## 7.11 [lyndaCampus User] Create Profile – Public Site

This flow is followed by non-authenticated lyndaCampus Users who need to create a profile when logging through IP login method (iplogin.lynda.com). After completing the profile, a new user is created in the DB, with the info/credentials provided by the lyndaCampus User.

In case the user already has a profile created, he/she simply needs to log in, using the section on the left of the page.

Note: The greeting after “Welcome” (“Ada Test” in this case) is the same general greeting specified by the corresponding lyndaCampus Master Admin during registration.

Welcome, Ada Test

Log in to continue your training. Create a profile to get started. A personal profile is required, and allows you to track your movie viewing history and enjoy other lynda.com features designed to help you organize and customize your training. [Learn more](#) about the features available to you once you create your profile.

[learn more](#)

**Log in to your personal profile**

User Name:

Password:

[Forgot password?](#)

[log in](#)

**Create a personal profile**

If you already have an active or past lynda.com account, [click here](#).

First Name:  \*

Last Name:  \*

Email:  \*

Choose User Name:  \*

Choose Password:  \*

Password (confirm):  \*

\*required field

Sign me up for:

lynda.com Monthly Newsletters

New Releases Announcements

Special Announcements and Offers

[System Requirements](#)

[sign in](#)

Fig 7.11 [Public Site] Create lyndaCampus User Profile

## **7.12 [lyndaCampus User] Upgrade to lyndaPro – Admin Site**

This flow is followed by Customer Support representatives who upgrade a lyndaCampus User's membership from a lyndaCampus to a lyndaPro subscription. This action will not affect this customer's lyndaCampus persona, it will simply add a new persona (lyndaPro Master Admin) to the account.

This is the only action besides creating brand new accounts that can be performed from the Admin site without the help of New Quotes.

Note: For the visual flow, please check the [Consumer Upgrade to lyndaPro](#), which is similar. For the diagram, please check the next page.

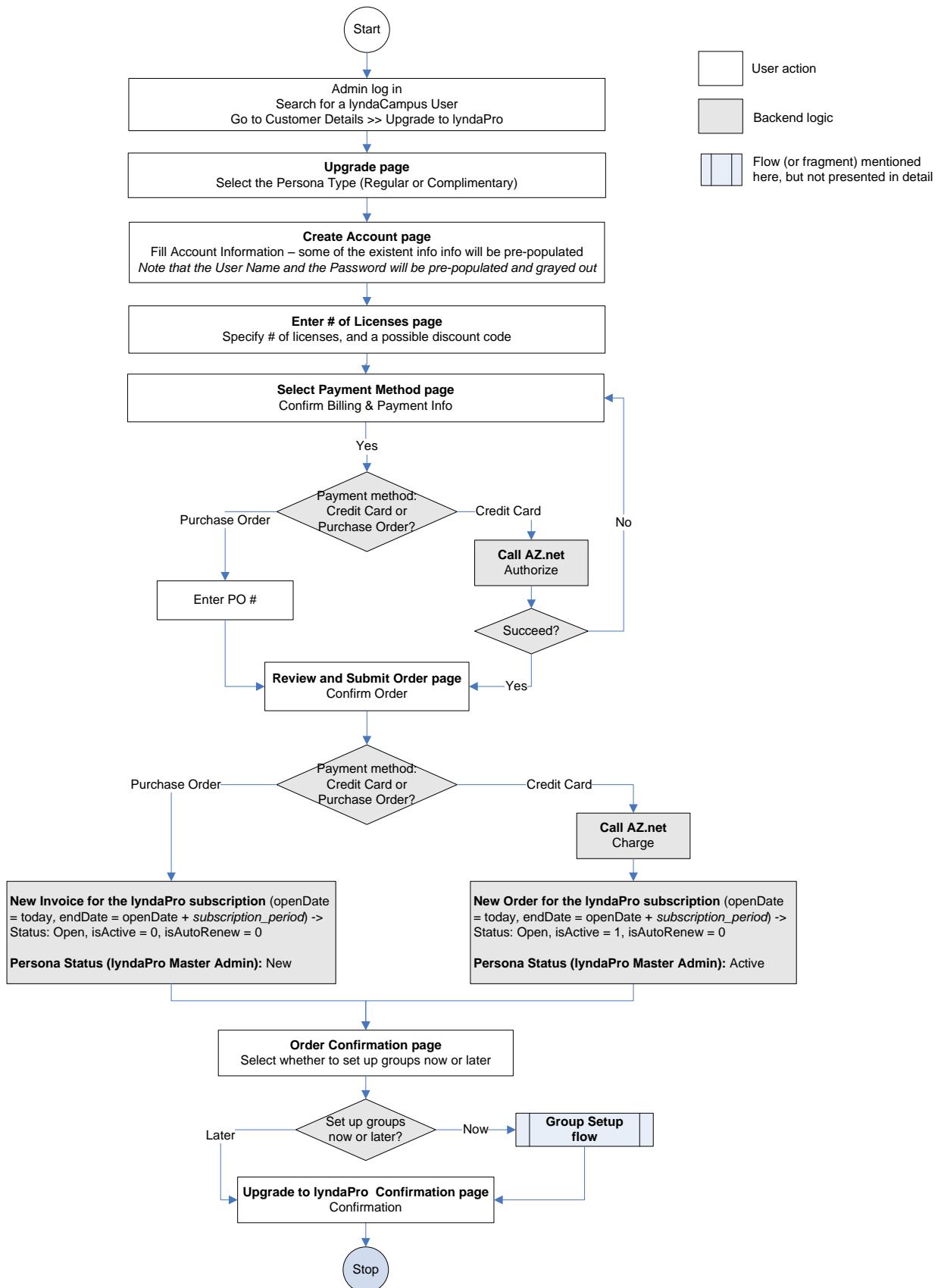


Fig 7.12 lyndaCampus User Upgrade to lyndaPro from Admin Site

# 8. Promotions



- Public site flows

## 8.1 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	<b>Paid Search</b>	Promotions of this type automatically get created by the system whenever a person accesses lynda.com through a Google search result.  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.
	<b>Gift Subscription</b>	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).
	<b>Affiliate</b>	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.  A member can help a single affiliate get compensated, and only once in his/her lynda.com membership life.
	<b>Discount</b>	It's a discount code that can be used by all personas, offering a one-time deduction from the amount of a document.

Promo Category	Promo Type	Description
PAID	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.
	Activation Key	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.  It can be redeemed by new members only.  <i>Note: Currently, the New Template is not used for any live promotion (except testing).</i>
	Trial URL	This type of promotion may come in 2 forms:  <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.  <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

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.*

**Creating promotions** – promotions can be added through the Admin site, usually by the Marketing personnel. In order to complete a promotion, the following parameters need to be set:

- Promotion Name – required field
- Promotion Partner – default value: first of list
- Promotion Type – default value : “Discount”
- Promotion Start Date – required field
- Promotion End Date – required field
- Distribution Method
- Description
- Promotion Code – required field, cannot be null, must be unique
- Channel – default value: “affiliate”
- Sub-channel – default value: “affiliate”
- Welcome email message
- Promo Access URL – required field for Trial URL Promotions, must be unique
- Greeting
- Personas that apply – required field, multiple selection possible for Paid Trial promotions, Discount, Gift Subscription, Affiliate, Paid Search
- Promotion product – required field
- Other parameters depending on the Promotion Type

**Promotions landing pages** – depending on the promotion category, there are 2 ways of creating a landing page for a promotion:

- Standard /No Template promotions: the landing page is designed by the developers and the redirect is created for each promotion separately
- Paid Trial (New Template and Choose Trial Plan M/MP/A/AP) promotions: the landing page can be customized through templates upon the creation of the promotion, by the Marketing personnel who creates the promotion

**Marketing promotions** – the following channels are used for marketing/distributing the promotions:

- Affiliate
- Direct
- Email
- Events
- Organic
- Paid Search
- Partner
- Viral

*Note: Currently, there are no live active promotions corresponding to Email, Organic and Viral channels.*

**Accessing promotions** – promotions can be accessed through one of the following locations:

- pages like [www.lynda.com/trial/{the URL of the promotion}](http://www.lynda.com/trial/{the URL of the promotion})
- from an online ad (from an affiliate's site or from Google) → for Affiliate or Paid Search promotions
- from Registration Flow, by entering a promo code → for Discount or Trial URL promotions
- from [www.lynda.com](http://www.lynda.com), by accessing the Support >> Register Activation Key option → for Activation Key promotions

## 8.2 [New Member, Expired/Cancelled/Billing Problem Consumer, or existing non-Consumers] Redeem No Template Promotion

This flow is followed by brand new customers, by non-Active Consumers (with Persona Status: Expired, Cancelled or Billing Problem), or by members with a non-Consumer persona who redeem one of the following promotion types (which offer free OTL access): No Template Activation Key, Standard Trial URL, Premium EDU, Gift Subscription.

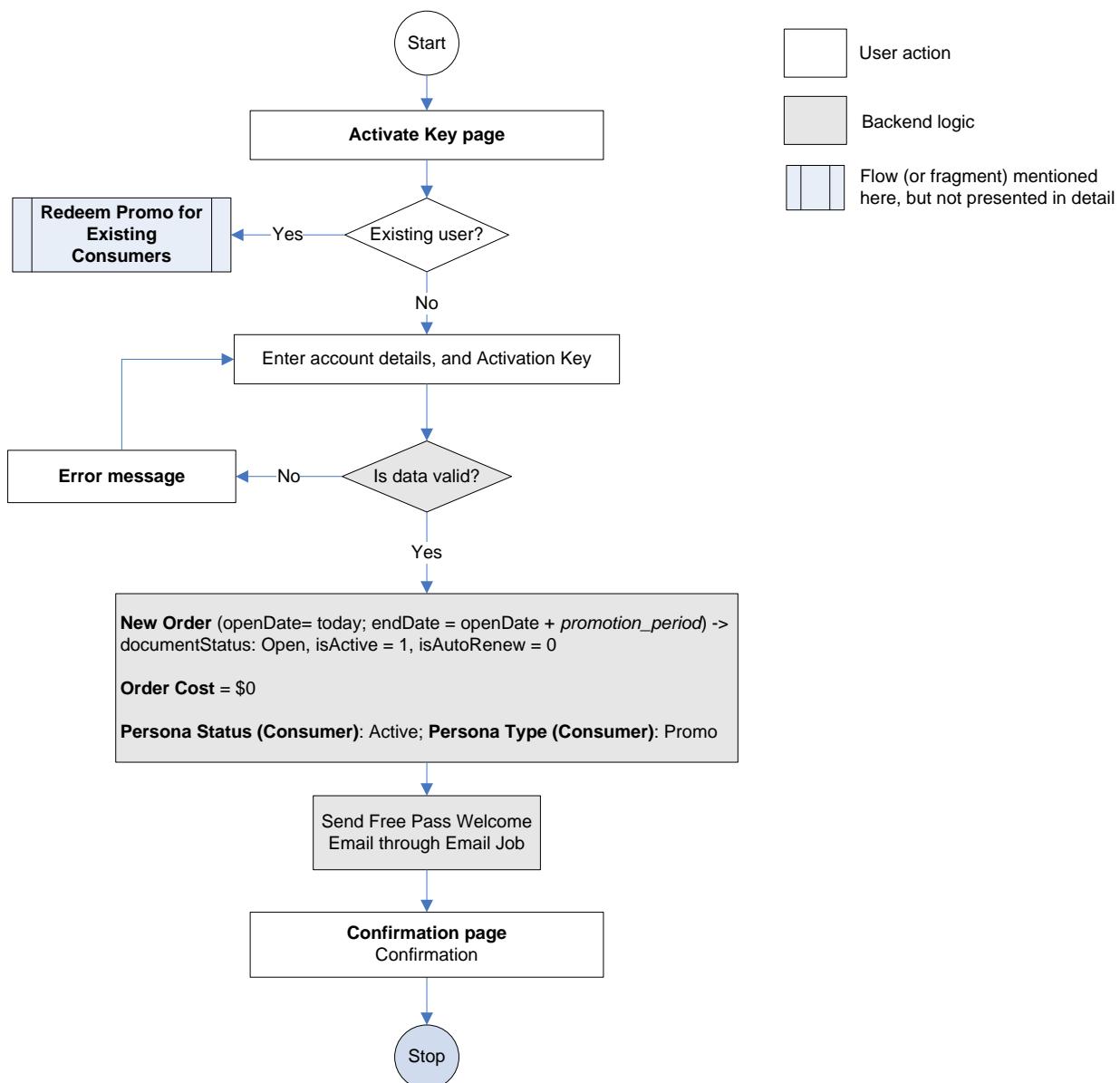


Fig 8.1 Redeem No Template Promotion by New Members, Expired / Cancelled / Billing Problem Consumers, or non-Consumers

## 8.3 [Active Regular Consumer] Redeem No Template Promotion

This flow is followed by Active Regular Consumers who redeem one of the following promotion types (which offer free OTL access): No Template Activation Key, Standard Trial URL, Premium EDU, Gift Subscription.

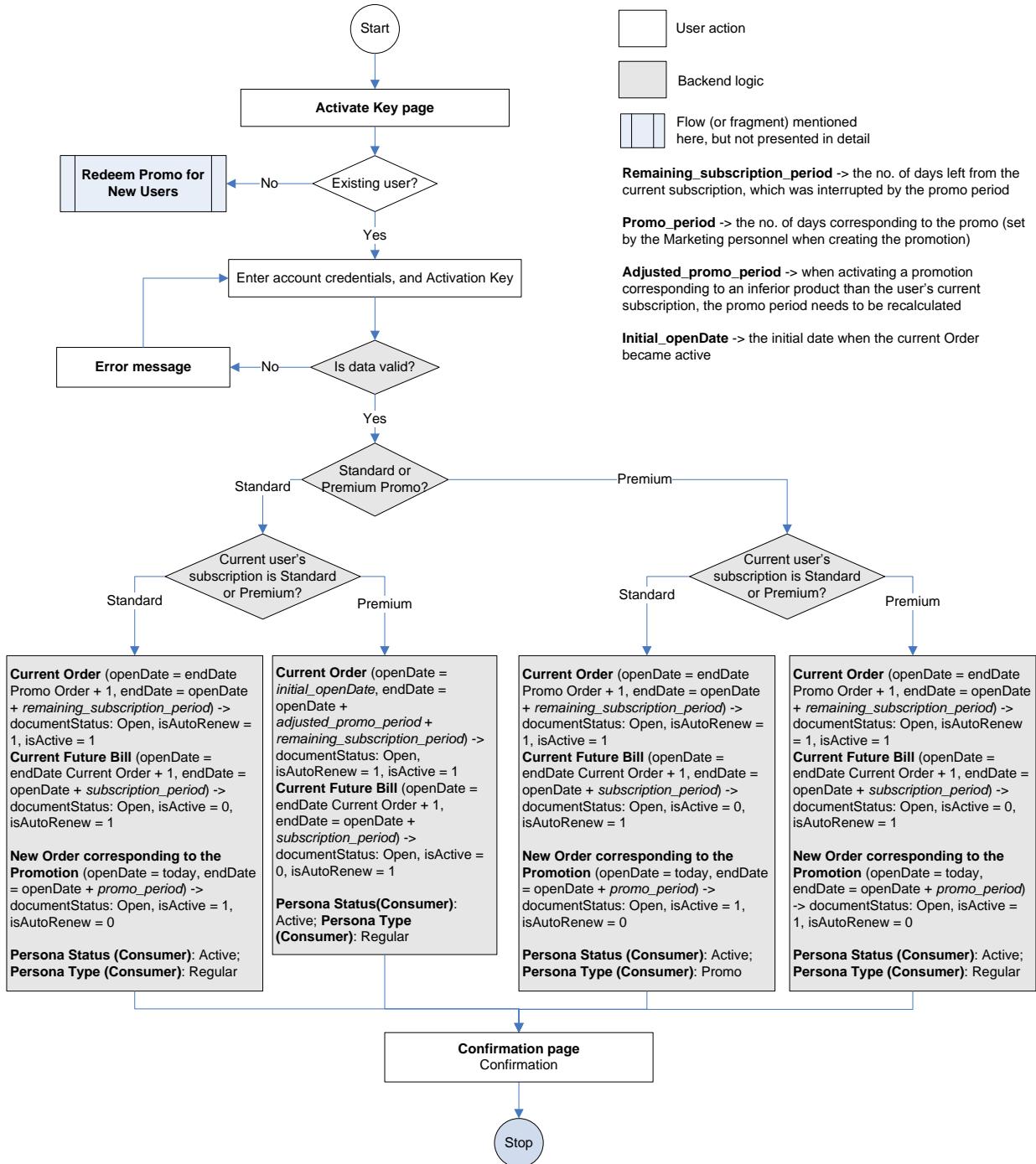


Fig 8.2 Redeem No Template Promotion by Active Regular Consumers

Presenting below the same info as in the previous diagram, but using a table-display for a quick read:

Promo Product	Monthly	Monthly Premium	Annual	Annual Premium
Subscription Type		<b>Current Order:</b> openDate = endDate Promo Order + 1, endDate = openDate + <i>remaining_subscription</i>	<b>Current Order:</b> openDate = endDate Promo Order + 1, endDate = openDate + <i>remaining_subscription</i>	<b>Current Order:</b> openDate = endDate Promo Order + 1, endDate = openDate + <i>remaining_subscription</i>
Monthly	<b>Current Order:</b> openDate = endDate Promo Order + 1, endDate = openDate + <i>remaining_subscription</i>	<b>Current Future Bill:</b> openDate = endDate Current Order + 1	<b>Current Future Bill:</b> openDate = endDate Current Order + 1	<b>Current Future Bill:</b> openDate = endDate Current Order + 1
	<b>New Order:</b> openDate = today, endDate = openDate + <i>promo_duration</i> , cost = \$0	<b>New Order:</b> openDate = today, endDate = openDate + <i>promo_duration</i> , cost = \$0	<b>New Order:</b> openDate = today, endDate = openDate + <i>promo_duration</i> , cost = \$0	<b>New Order:</b> openDate = today, endDate = openDate + <i>promo_duration</i> , cost = \$0
	<b>Persona Type:</b> Regular	<b>Persona Type:</b> Promo (until the end of the promo period, afterwards it becomes Regular again)	<b>Persona Type:</b> Regular	<b>Persona Type:</b> Promo (until the end of the promo period, afterwards it becomes Regular again)
Monthly Premium	<b>Current Order:</b> endDate = <i>initial_endDate</i> + <i>adjusted_promo_duration</i>	<b>Current Order:</b> openDate = endDate Promo Order + 1, endDate = openDate + <i>remaining_subscription</i>	<b>Current Order:</b> endDate = <i>initial_endDate</i> + <i>adjusted_promo_duration</i>	<b>Current Order:</b> openDate = endDate Promo Order + 1, endDate = openDate + <i>remaining_subscription</i>
	<b>Current Future Bill:</b> openDate = endDate Current Order + 1, endDate = openDate + <i>subscription_period</i>	<b>Current Future Bill:</b> openDate = endDate Current Order + 1	<b>Current Future Bill:</b> openDate = endDate Current Order + 1, endDate = openDate + <i>subscription_period</i>	<b>Current Future Bill:</b> openDate = endDate Current Order + 1
	<b>Persona Type:</b> Regular	<b>New Order:</b> openDate = today, endDate = openDate + <i>promo_duration</i> , cost = \$0	<b>Persona Type:</b> Regular	<b>New Order:</b> openDate = today, endDate = openDate + <i>promo_duration</i> , cost = \$0

	<b>Persona Type:</b> Regular	<b>Persona Type:</b> Regular	
Annual	<b>Current Order:</b> openDate = endDate Promo Order + 1, endDate = openDate + <i>remaining_subscription</i> <b>Current Future Bill:</b> openDate = endDate Current Order + 1	<b>Current Order:</b> openDate = endDate Promo Order + 1, endDate = openDate + <i>remaining_subscription</i> <b>Current Future Bill:</b> openDate = endDate Current Order + 1	<b>Current Order:</b> openDate = endDate Promo Order + 1, endDate = openDate + <i>remaining_subscription</i> <b>Current Future Bill:</b> openDate = endDate Current Order + 1
	<b>New Order:</b> openDate = today, endDate = openDate + <i>promo_duration</i> , cost = \$0	<b>New Order:</b> openDate = today, endDate = openDate + <i>promo_duration</i> , cost = \$0	<b>New Order:</b> openDate = today, endDate = openDate + <i>promo_duration</i> , cost = \$0
	<b>Persona Type:</b> Regular	<b>Persona Type:</b> Promo (until the end of the promo period, afterwards it becomes Regular again)	<b>Persona Type:</b> Regular
Annual Premium	<b>Current Order:</b> endDate = <i>initial_endDate</i> + <i>adjusted_promo_duration</i> <b>Current Future Bill:</b> openDate = endDate Current Order + 1, endDate = openDate + <i>subscription_period</i>	<b>Current Order:</b> openDate = endDate Promo Order + 1, endDate = openDate + <i>remaining_subscription</i> <b>Current Future Bill:</b> openDate = endDate Current Order + 1	<b>Current Order:</b> endDate = <i>initial_endDate</i> + <i>adjusted_promo_duration</i> <b>Current Future Bill:</b> openDate = endDate Current Order + 1
	<b>New Order:</b> openDate = today, endDate = openDate + <i>promo_duration</i> , cost = \$0	<b>New Order:</b> openDate = today, endDate = openDate + <i>subscription_period</i>	<b>New Order:</b> openDate = today, endDate = openDate + <i>promo_duration</i> , cost = \$0
	<b>Persona Type:</b> Regular	<b>Persona Type:</b> Regular	<b>Persona Type:</b> Regular

$$\text{adjusted\_promo\_duration} = \frac{\text{promo\_product\_cost}}{\text{promo\_product\_period}} * \text{promo\_duration} * \frac{\text{subscription\_period}}{\text{subscription\_cost}}$$

Example → in case of activating a 7-day Monthly promo during an Annual Premium subscription, the parameters above would have the following values: *promo\_product\_cost* = \$25, *promo\_product\_period* = 28/29/30/31 days (depending on the no. of days in a month), *promo\_duration* = 7 days, *subscription\_period* = 365/366 days (depending if it's a leap year or not), *subscription\_cost* = \$375

## 8.4 [New Member] Redeem Paid Trial Promotion

This flow is followed by brand new customers who redeem a Paid Trial Activation Key promotion (which offers free or paid OTL access), that may or may not be followed by a subscription.

Note: The Choose Trial Plan M/MP/A/AP promotion (Trial URL) can be accessed through a unique code, which can be used on the 1<sup>st</sup> step of the Consumer Registration flow, same as a Discount code.

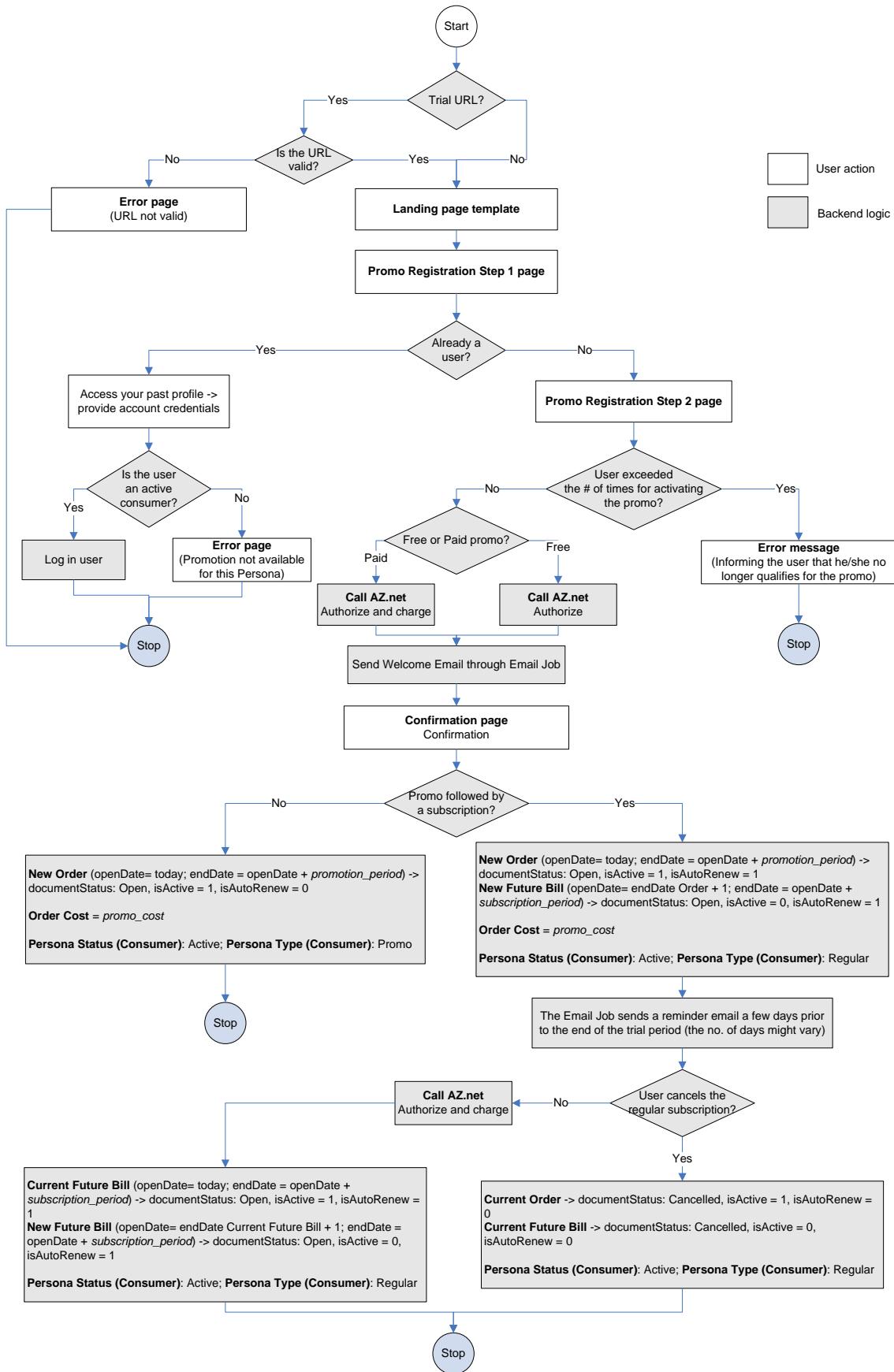


Fig 8.3 Redeem Paid Trial Promotion by New Members

## 8.5 [Promo Member] Upgrade from Promo to Regular Subscription

This flow is followed by promo members who decide to purchase a regular subscription. Depending on the level (or level difference) between the promotion product and the subscription type, we might have different situations.

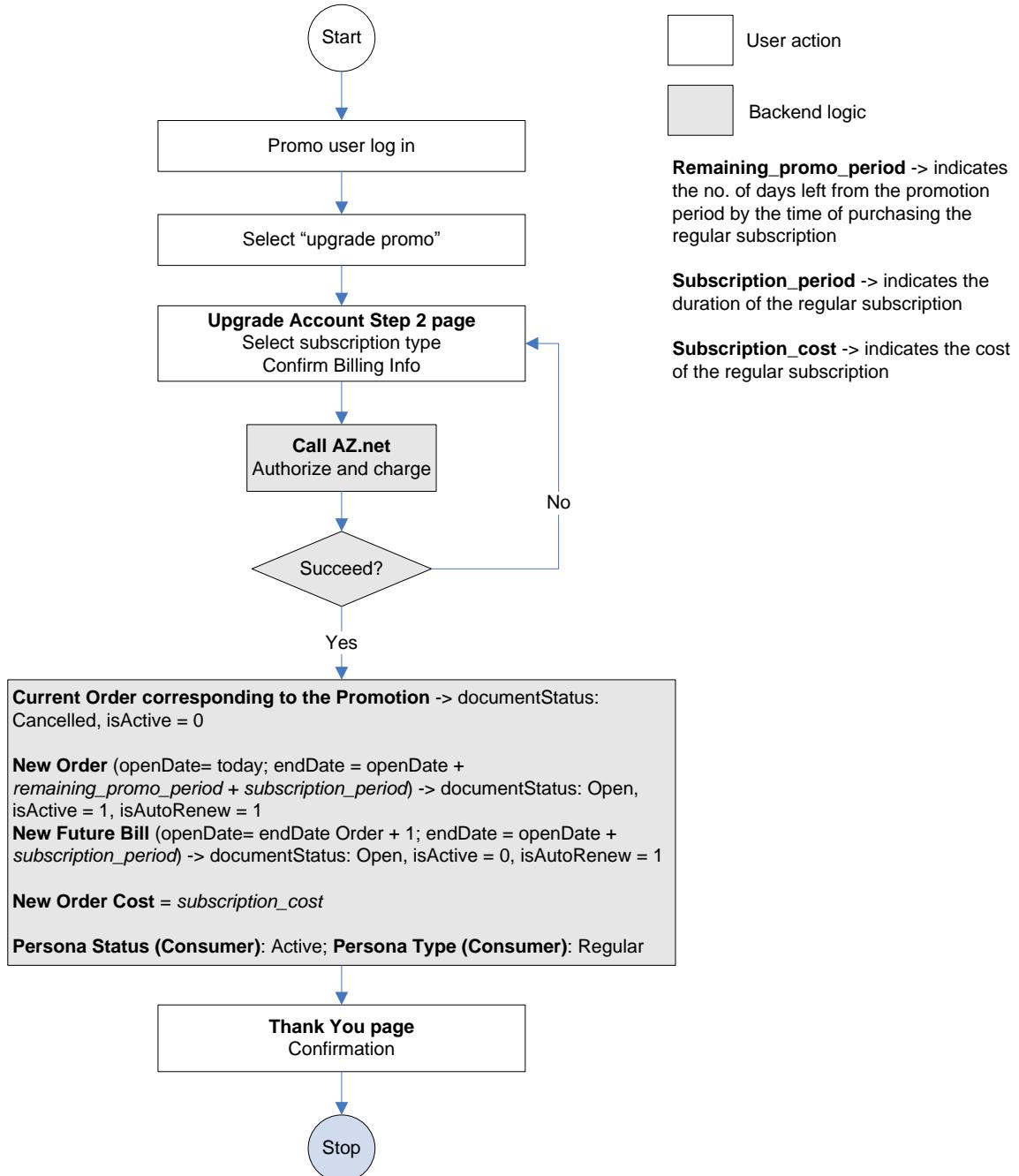


Fig 8.4 Promo Member Upgrade to Regular Subscription -> same level (Standard -> Standard, Premium -> Premium)

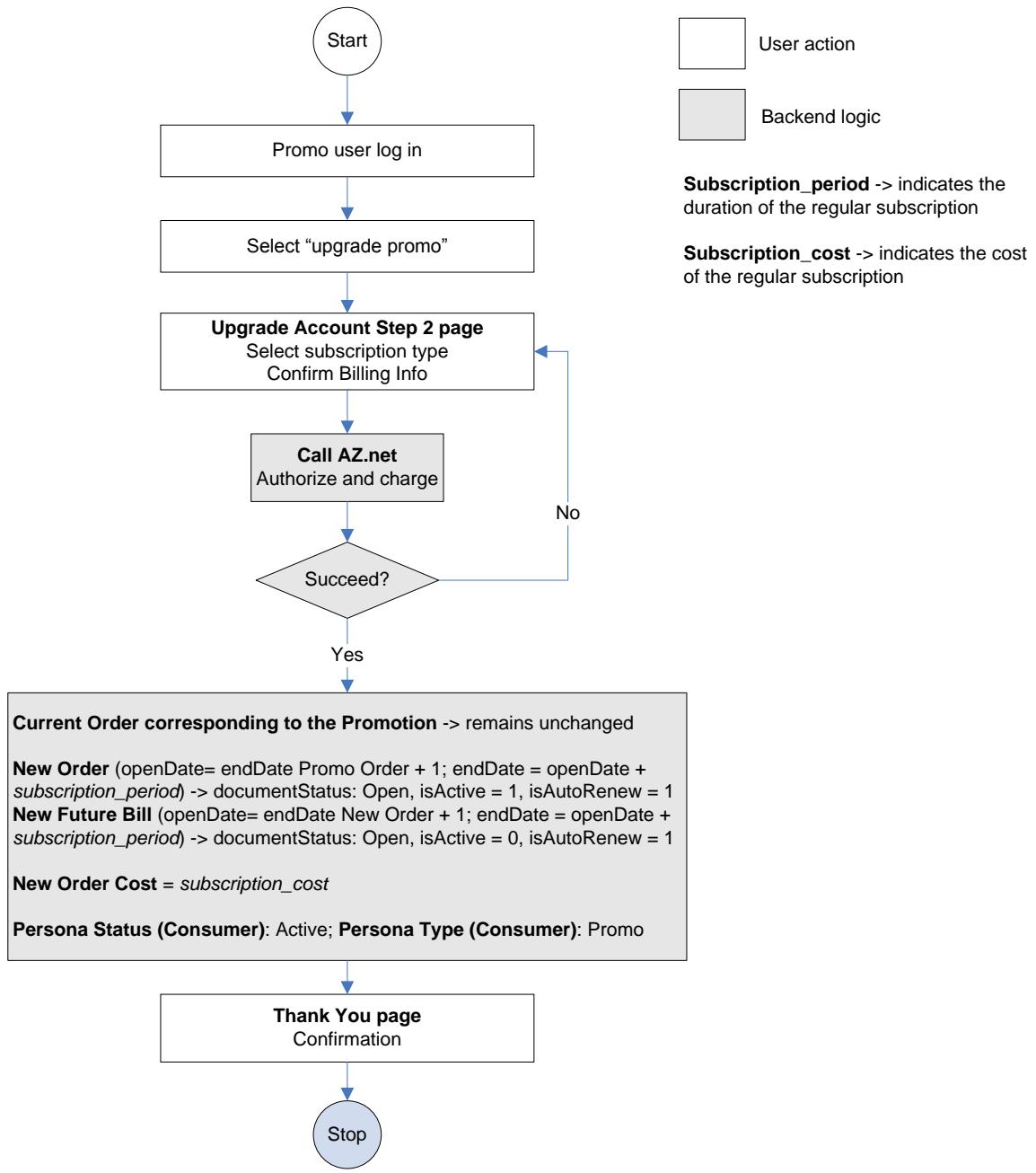


Fig 8.5 Promo Member Upgrade to Regular Subscription -> high-level to low-level (Premium -> Standard)

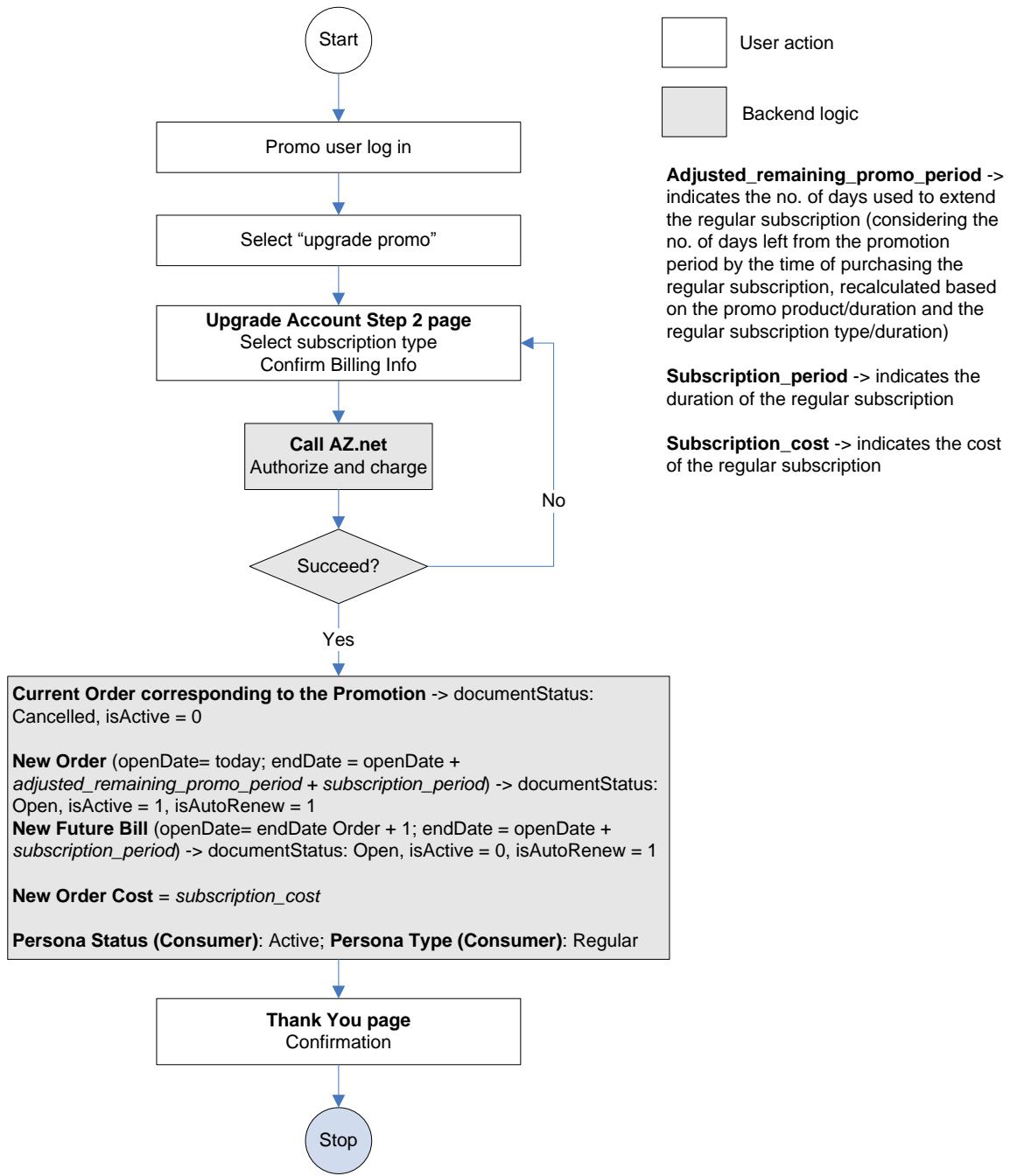


Fig 8.6 Promo Member Upgrade to Regular Subscription -> low-level to high-level (Standard -> Premium)

Presenting below the same info as in the previous diagrams, but using a table-display for a quick read:

Subscr. Type	Monthly	Monthly Premium	Annual	Annual Premium
Promo Product	<b>Current Promo Order gets cancelled &amp; deactivated</b>	<b>Current Promo Order gets cancelled &amp; deactivated</b>	<b>Current Promo Order gets cancelled &amp; deactivated</b>	<b>Current Promo Order gets cancelled &amp; deactivated</b>
Monthly	<b>New Order:</b> openDate = today, endDate = openDate + remaining_promo_duration + subscription_period <i>n</i> , cost = \$25 <b>New Future Bill:</b> openDate = endDate Current Order + 1, endDate = openDate + subscription_period	<b>New Order:</b> openDate = today, endDate = openDate + adjusted_remaining_promo_duration + subscription_period, cost = \$37.5 <b>New Future Bill:</b> openDate = endDate Current Order + 1, endDate = openDate + subscription_period	<b>New Order:</b> openDate = today, endDate = openDate + remaining_promo_duration + subscription_period, cost = \$250 <b>New Future Bill:</b> openDate = endDate Current Order + 1, endDate = openDate + subscription_period	<b>New Order:</b> openDate = today, endDate = openDate + adjusted_promo_duration + subscription_period, cost = \$375 <b>New Future Bill:</b> openDate = endDate Current Order + 1, endDate = openDate + subscription_period
	<b>Persona Type:</b> Regular	<b>Persona Type:</b> Regular	<b>Persona Type:</b> Regular	<b>Persona Type:</b> Regular
	<b>Current Promo Order remains unchanged</b>	<b>Current Promo Order gets cancelled &amp; deactivated</b>	<b>Current Promo Order remains unchanged</b>	<b>Current Promo Order gets cancelled &amp; deactivated</b>
Monthly Premium	<b>New Order:</b> openDate = endDate Promo Order + 1, endDate = openDate + subscription_period <i>n</i> , cost = \$25 <b>New Future Bill:</b> openDate = endDate Current Order + 1, endDate = openDate + subscription_period	<b>New Order:</b> openDate = today, endDate = openDate + remaining_promo_duration + subscription_period <i>n</i> , cost = \$37.5 <b>New Future Bill:</b> openDate = endDate Current Order + 1, endDate = openDate + subscription_period	<b>New Order:</b> openDate = endDate Promo Order + 1, endDate = openDate + subscription_period <i>n</i> , cost = \$250 <b>New Future Bill:</b> openDate = endDate Current Order + 1, endDate = openDate + subscription_period	<b>New Order:</b> openDate = today, endDate = openDate + remaining_promo_duration + subscription_period <i>n</i> , cost = \$375 <b>New Future Bill:</b> openDate = endDate Current Order + 1, endDate = openDate + subscription_period
	<b>Persona Type:</b> Promo until the end of promo period,	<b>Persona Type:</b> subscription_period	<b>Persona Type:</b> Promo until the end of promo period,	<b>Persona Type:</b> subscription_period

	Regular afterwards	Regular	Regular afterwards	Regular
	<b>Current Promo Order gets cancelled &amp; deactivated</b>	<b>Current Promo Order gets cancelled &amp; deactivated</b>	<b>Current Promo Order gets cancelled &amp; deactivated</b>	<b>Current Promo Order gets cancelled &amp; deactivated</b>
Annual	<p><b>New Order:</b>  <math>\text{openDate} = \text{today}</math>,  <math>\text{endDate} = \text{openDate} + \text{remaining_promo_duration} + \text{subscription_period}</math>,  <math>n, \text{cost} = \\$25</math></p> <p><b>New Future Bill:</b>  <math>\text{openDate} = \text{endDate Current Order} + 1</math>,  <math>\text{endDate} = \text{openDate} + \text{subscription_period}</math></p>	<p><b>New Order:</b>  <math>\text{openDate} = \text{today}</math>,  <math>\text{endDate} = \text{openDate} + \text{adjusted_remaining_promo_duration} + \text{subscription_period}</math>,  <math>n, \text{cost} = \\$37.5</math></p> <p><b>New Future Bill:</b>  <math>\text{openDate} = \text{endDate Current Order} + 1</math>,  <math>\text{endDate} = \text{openDate} + \text{subscription_period}</math></p>	<p><b>New Order:</b>  <math>\text{openDate} = \text{today}</math>,  <math>\text{endDate} = \text{openDate} + \text{remaining_promo_duration} + \text{subscription_period}</math>,  <math>n, \text{cost} = \\$250</math></p> <p><b>New Future Bill:</b>  <math>\text{openDate} = \text{endDate Current Order} + 1</math>,  <math>\text{endDate} = \text{openDate} + \text{subscription_period}</math></p>	<p><b>New Order:</b>  <math>\text{openDate} = \text{today}</math>,  <math>\text{endDate} = \text{openDate} + \text{adjusted_promo_duration} + \text{subscription_period}</math>,  <math>n, \text{cost} = \\$375</math></p> <p><b>New Future Bill:</b>  <math>\text{openDate} = \text{endDate Current Order} + 1</math>,  <math>\text{endDate} = \text{openDate} + \text{subscription_period}</math></p>
	<b>Persona Type:</b> Regular	<b>Persona Type:</b> Regular	<b>Persona Type:</b> Regular	<b>Persona Type:</b> Regular
	<b>Current Promo Order remains unchanged</b>	<b>Current Promo Order gets cancelled &amp; deactivated</b>	<b>Current Promo Order remains unchanged</b>	<b>Current Promo Order gets cancelled &amp; deactivated</b>
Annual Premium	<p><b>New Order:</b>  <math>\text{openDate} = \text{endDate Promo Order} + 1</math>,  <math>\text{endDate} = \text{openDate} + \text{subscription_period}</math>,  <math>n, \text{cost} = \\$25</math></p> <p><b>New Future Bill:</b>  <math>\text{openDate} = \text{endDate Current Order} + 1</math>,  <math>\text{endDate} = \text{openDate} + \text{subscription_period}</math></p>	<p><b>New Order:</b>  <math>\text{openDate} = \text{today}</math>,  <math>\text{endDate} = \text{openDate} + \text{remaining_promo_duration} + \text{subscription_period}</math>,  <math>n, \text{cost} = \\$37.5</math></p> <p><b>New Future Bill:</b>  <math>\text{openDate} = \text{endDate Current Order} + 1</math>,  <math>\text{endDate} = \text{openDate} + \text{subscription_period}</math></p>	<p><b>New Order:</b>  <math>\text{openDate} = \text{endDate Promo Order} + 1</math>,  <math>\text{endDate} = \text{openDate} + \text{subscription_period}</math>,  <math>n, \text{cost} = \\$250</math></p> <p><b>New Future Bill:</b>  <math>\text{openDate} = \text{endDate Current Order} + 1</math>,  <math>\text{endDate} = \text{openDate} + \text{subscription_period}</math></p>	<p><b>New Order:</b>  <math>\text{openDate} = \text{today}</math>,  <math>\text{endDate} = \text{openDate} + \text{remaining_promo_duration} + \text{subscription_period}</math>,  <math>n, \text{cost} = \\$375</math></p> <p><b>New Future Bill:</b>  <math>\text{openDate} = \text{endDate Current Order} + 1</math>,  <math>\text{endDate} = \text{openDate} + \text{subscription_period}</math></p>
	<b>Persona Type:</b> Promo until the end of promo period, Regular afterwards	<b>Persona Type:</b> Regular	<b>Persona Type:</b> Promo until the end of promo period, Regular afterwards	<b>Persona Type:</b> Regular

$$\text{adjusted\_remain\_promo\_duration} = \frac{\text{promo\_product\_cost}}{\text{promo\_product\_period}} * \text{remaining\_promo\_duration} * \frac{\text{subscription\_period}}{\text{subscription\_cost}}$$

Example → in case of an upgrade from a 7-day Monthly promo to Annual Premium subscription, after 3 days of activating the promo, the parameters above would have the following values:  
*promo\_product\_cost* = \$25, *promo\_product\_period* = 28/29/30/31 days (depending on the no. of days in a month), *remaining\_promo\_duration* = 4 days, *subscription\_period* = 365/366 days (depending if it's a leap year or not), *subscription\_cost* = \$375

# 9. Gift Subscriptions



- Public site flows

## 9.1 General Overview

The Gift Subscription is a type of promotions with the following attributes: we have a Purchaser who buys the Gift Subscription 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 Recipient (receiver of the Gift Subscription) can redeem as many as he/she has (even several at the same time).

*Note: Even though I've used above the terms Purchaser and Recipient, only Purchaser is actually a valid persona on site. The Recipient is just a naming used to indicate the receiver of the Gift Subscription, which will have a Consumer persona once he/she redeems the Gift Subscription.*

In case the person that purchases the Gift Subscription does not have a lynda.com account, he/she is required to create an account before completing the flow. The persona associated to this account will be Purchaser – by having this persona only, the user doesn't have OTL access and it's not able to log into the site.

In case the person that purchases the Gift Subscription has a lynda.com account, an additional Purchaser persona will be added to his/her account. Furthermore, all transactions corresponding to the Purchaser persona will appear into the Account + Billing >> Payment History.

### **Gift Subscription types:**

- 1-month: offers Standard OTL access for a fix duration of 30 days (does not depend on the month it's redeemed)
- 3-month: offers Standard OTL access for a fix duration of 90 days (does not depend on the month it's redeemed)
- 6-month: offers Standard OTL access for a fix duration of 180 days (does not depend on the month it's redeemed)
- 12-month: offers Standard OTL access for a fix duration of 365 days (does not depend on the month it's redeemed)
- 12-month Premium: offers Premium OTL access for a fix duration of 30 days (does not depend on the month it's redeemed)

There are also the following Gift Subscription types, which are not currently in use: 1-month Premium, 3-month Premium, 6-month Premium.

# 9.2 [Purchaser] Purchase Gift Subscription flow – Public Site

This flow is followed by existing members or non-members, who wish to purchase Gift Subscription(s). The flow can only be completed from the Public site.

The screenshots illustrate the following steps:

- Step 1: Search for 'gift subscriptions'.**
- Step 2: Select a gift subscription plan (e.g., 1 MONTH ACCESS).**
- Step 3: Enter recipient information for two recipients (Ada Miron and John Doe) with their respective delivery dates (09/27/2011 and 09/30/2011).**
- Step 4: Enter payment information (Billing Information and Credit Card Information).**

Fig 9.1 [Public Site] Purchase Gift Subscription

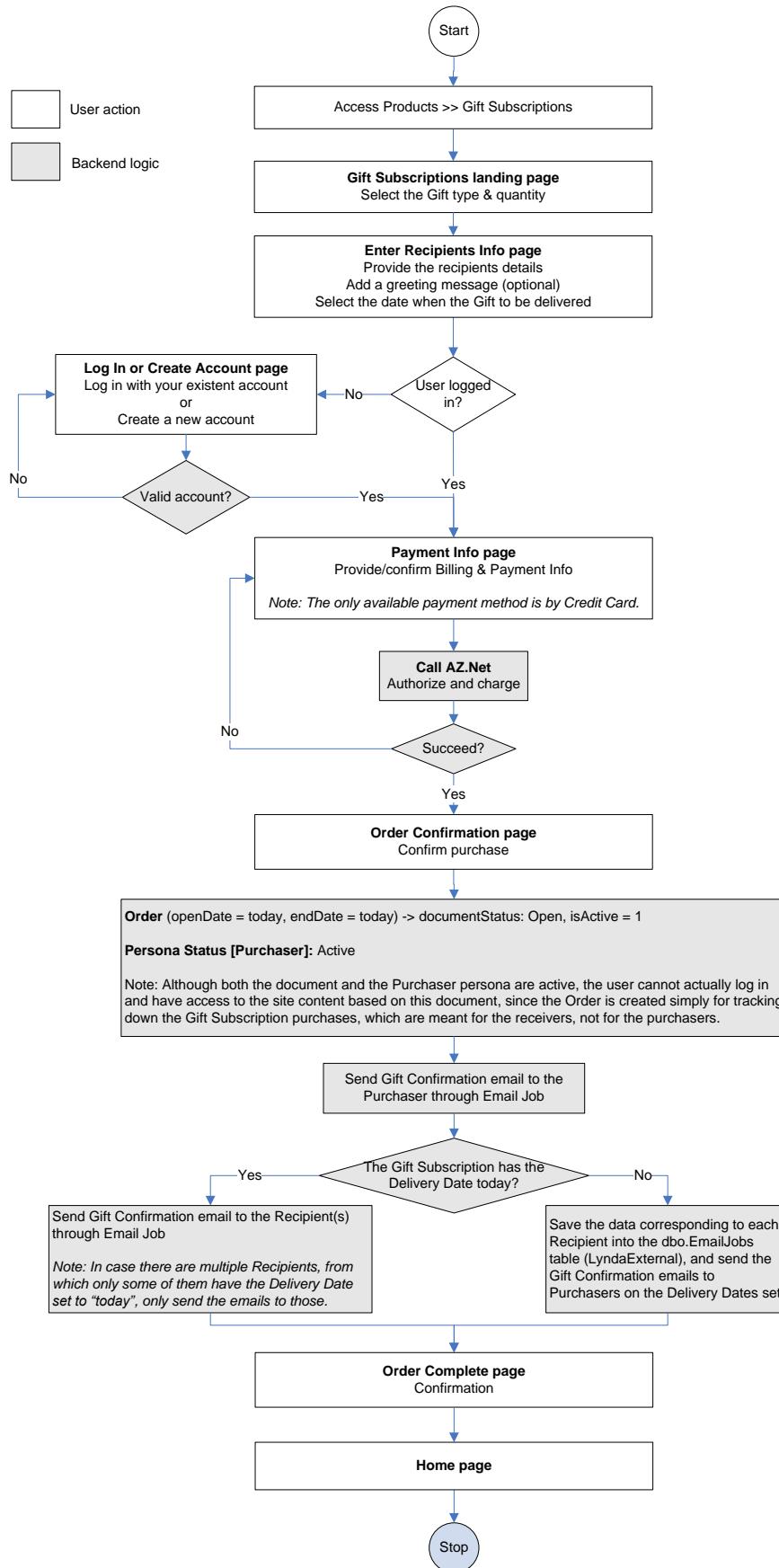


Fig 9.2 Purchase Gift Subscription from the Public Site

# 9.3 [Recipient] Redeem Gift Subscription flow – Public Site

This flow is followed by existing members or non-members, who received a Gift Subscription and want to redeem it. The flow can only be completed from the Public site.

Note: For the diagram, please check the [Redeem No Template Promotions by new members/non-Consumers](#) or [Redeem No Template Promotions by Active Consumers](#) from the Promotions chapter, which also include this flow.

The figure consists of three screenshots of a web browser showing the lynda.com gift subscription redemption process. The browser address bar shows the URL [https://10.1.161.105/giftsubscription/GiftSubscription\\_recipient.aspx](https://10.1.161.105/giftsubscription/GiftSubscription_recipient.aspx).

**Screenshot 1:** The 'Welcome to the lynda.com Gift Subscription Claim Center' page. It asks for the email address where the gift subscription was sent and the activation key. The URL is [https://10.1.161.105/giftsubscription/GiftSubscription\\_recipient1.aspx](https://10.1.161.105/giftsubscription/GiftSubscription_recipient1.aspx). A red arrow labeled '1' points down to the 'Activation Key' field, and another red arrow labeled '2' points down to the 'submit' button.

**Screenshot 2:** The 'Gift Subscription Claim Center' page after submission. It shows a 'Subscriber Login' section with fields for 'Username' and 'Password', and a 'New Subscribers: Create Account' section with fields for 'First Name', 'Last Name', 'Email', 'Choose Username', 'Choose Password', and 'Password (confirm)'. A red arrow labeled '2' points down to the 'create account' button, and another red arrow labeled '3' points down to the 'create account' link below it.

**Screenshot 3:** The 'Gift Subscription Claim Complete' page. It thanks the user for redeeming the gift subscription and provides a 'continue' button. The URL is [https://10.1.161.105/giftsubscription/GiftSubscription\\_recipient2.aspx](https://10.1.161.105/giftsubscription/GiftSubscription_recipient2.aspx).

Fig 9.3 [Public Site] Redeem Gift Subscription

## 9.4 [Recipient] Upgrade from Gift Subscription to Regular Subscription – Public Site

This flow is followed by existing Recipients who redeemed a Gift Subscription and now want to upgrade to a Regular Individual Subscription.

Note: For the step-by-step flow, please check the [Upgrade Membership from Public Site](#) corresponding to lyndaClassroom (for the visual flow) and the [Upgrade from Promo to Regular Subscription](#) from the Promotions chapter (for the diagram), which also includes these flows.

A user can redeem as many Gift Subscriptions as he/she has. Depending on the subscription level corresponding to the redeemed Gift (Standard or Premium), we can have the following situations:

### Case 1. Upgrade from multiple Gift Subscriptions (all Standard) to a Standard Subscription

A new Order is created for the regular subscription, which will only become active once the Gift Subscription period ended.

### Case 2. Upgrade from multiple Gift Subscriptions (all Premium) to a Premium Subscription

A new Order is created for the regular subscription, which will only become active once the Gift Subscription period ended.

### Case 3. Upgrade from multiple Gift Subscriptions (mixed Premium & Standard) to a Premium Subscription



The user claims in **01/01/2011** 2 Gift Subscriptions: **12-month Premium** followed by a **1-month Standard**:

- Gift Subscription 1 -> new Order (openDate = 01/01/2011, endDate = 12/31/2011), cost = \$375
- Gift Subscription 2 -> new Order(openDate = 01/01/2012, endDate = 01/31/2012), cost = \$25

In **06/30/2011** (referred to as “today” in the formula below) the user decides to upgrade to **Monthly Premium** subscription.

A new Order is created, the user is billed for the subscription right away, and the subscription will be effective starting with:

$$\begin{aligned}
 \text{openDate Order} &= \text{today} + \text{remaining}_{\text{GS1}} + \frac{\text{cost}_{\text{GS2}}}{\text{duration}_{\text{GS2}}} * \text{remaining}_{\text{GS2}} * \frac{\text{subscription\_period}}{\text{subscription\_cost}} \\
 &= \text{today} + 184\text{d} + \frac{\$25}{30\text{d}} * 30\text{d} * \frac{30\text{d}}{\$37.5} = \text{today} + 204\text{d} = 01/21/2012
 \end{aligned}$$

$$\text{endDate Order} = \text{openDate Order} + \text{subscription\_period} = 02/20/2012$$

*Note: The subscription\_period depends on the number of days in a month.*

A Future Bill will also be created, with the following attributes:

$$\text{openDate Future Bill} = \text{endDate Order} + 1 = 02/21/2012$$

$$\text{endDate Future Bill} = \text{openDate Future Bill} + 1 = 03/20/2012$$

*Note: Currently, the system handles differently the sequence of Gift Subscriptions, depending on the order they got redeemed.*

- In case a user first redeems a Standard Gift Subscription, followed by a Premium Gift Subscription: orders are created for each, and in the moment the Premium Gift is redeemed, it will be effective immediately, moving the remaining period of the Standard Gift at the end of the Premium Gift period (readjusting the openDate/endDate on the Standard Gift Order).
- In case the user first redeems a Premium Gift, followed by a Standard Gift, no new order will be created for the Standard Gift, instead, the Premium Gift Order will be extended with a number of days corresponding to the recalculated Standard Gift period (thus, for a 1-month Gift, its corresponding period will not be 30 days, but less, computed based on the cost/duration of the 2 Gifts in question)

*In the attempt of refactoring Promotions, we'd like to have this changed, and create orders for each promotion, instead of extending existing documents. Another reason would be that the approach described above doesn't quite do justice to our customers, who have no way of knowing that the order of redeeming Gifts will influence the duration of their OTL access.*

#### Case 4. Upgrade from multiple Gift Subscriptions (mixed Premium & Standard) to a Standard Subscription



The user claims in **01/01/2011** 2 Gift Subscriptions: **12-month Premium followed by a 1-month Standard**:

- Gift Subscription 1 -> new Order (openDate = 01/01/2011, endDate = 12/31/2011), cost = \$375
- Gift Subscription 2 -> new Order(openDate = 01/01/2012, endDate = 01/31/2012), cost = \$25

In **06/30/2011** (referred to as “today” in the formula below) the user decides to upgrade to **Monthly Premium** subscription.

A new Order is created, the user is billed for the subscription right away, and the subscription will be effective starting with:

**openDate Order = today + remaining<sub>GS1</sub> + duration<sub>GS2</sub> = endDate Order GS2 + 1 = 02/01/2012**  
**endDate Order = openDate Order + subscription\_period = 02/29/2012**

*Note: The subscription\_period depends on the number of days in a month.*

A Future Bill will also be created, with the following attributes:

**openDate Future Bill = endDate Order + 1 = 03/01/2012**  
**endDate Future Bill = openDate Future Bill + 1 = 03/31/2012**

*Note: Currently, the system handles differently the sequence of Gift Subscriptions, depending on the order they got redeemed.*

- *In case a user first redeems a Standard Gift Subscription, followed by a Premium Gift Subscription: orders are created for each, and in the moment the Premium Gift is redeemed, it will be effective immediately, moving the remaining period of the Standard Gift at the end of the Premium Gift period (readjusting the openDate/endDate on the Standard Gift Order).*
- *In case the user first redeems a Premium Gift, followed by a Standard Gift, no new order will be created for the Standard Gift, instead, the Premium Gift Order will be extended with a number of days corresponding to the recalculated Standard Gift period (thus, for a 1-month Gift, its corresponding period will not be 30 days, but less, computed based on the cost/duration of the 2 Gifts in question)*

*In the attempt of refactoring Promotions, we'd like to have this changed, and create orders for each promotion, instead of extending existing documents. Another reason would be that the approach described above doesn't quite do justice to our customers, who have no way of knowing that the order of redeeming Gifts will influence the duration of their OTL access.*

# Annexes

Abbreviations:

Abbreviation	Description	Abbreviation	Description
AZ.Net	Authorize.Net	FTE	Full Time Employee
CAS	Central Authentication Service	MA	Master Admin
CC	Credit Card	OCAD	Ontario College of Art & Design
CS	Customer Service (or Support)	OTL®	Online Training Library®
DB	Database	PO	Purchase Order

Tables from the DB corresponding to all the parameters used along the document:

Parameter	DB Table	Description
<b>isActive</b>	dbo.Documents	Indicates whether a document is active or not
<b>isActive</b>	dbo.GroupInvitations	Indicates whether a Student can be sent the Welcome Email and able to register into a given class. In order for the Student to have this flag set to 1, he/she has to either have the Payment Status = Paid, or have the unpaid invoice (created when the Educator chose Purchase Order as payment method for the class) activated
<b>openDate</b>	dbo.Documents	Indicates the date when the document becomes active
<b>startDate</b>	dbo. SubscriptionPlanChangeSummary	Indicates the beginning of the next subscription period in case of Consumer downgrade or lyndaPro renewal
<b>activateOnOpenDate</b>	dbo.Documents	Indicates whether a document with start date in the future will be automatically activated by the Nightly Job on that given day or not
<b>endDate</b>	dbo.DocumentProducts	Indicates the end date of a document
<b>isAutoRenew</b>	dbo.DocumentProducts	Indicates whether a document is auto-renew or not (in other words, whether a subscription is recurrent or not)

<b>amount</b> (appears in this document as the <i>Order/Invoice/Bill Cost</i> )	dbo.Documents dbo.DocumentProducts	Indicates the final amount to be paid (after subtracting all possible discounts)
<b>discount</b>	dbo.Documents dbo.DocumentProducts	Indicates the discount applied to a document
<b>pendingPaymentStatus</b>	dbo. SubscriptionPlanChangeSummary	Indicates the status of a Consumer downgrade or lyndaPro renewal pending action
<b>refSubscriptionPlanChangeType_sID</b>	dbo. SubscriptionPlanChangeSummary	Indicates the action type (Consumer Downgrade, lyndaPro Renew)
<b>quantity</b>	dbo. SubscriptionPlanChangeSummary	Indicates the number of licenses that will be charged for the next lyndaPro renewal period