talentlms

Selling Courses with TalentLMS:

Best Practices & Guidelines

This TalentLMS guide is designed to assist Administrators in setting up their account to sell courses. Here, you'll find instructions on how to customize your portal, create courses with monetization in mind, as well as how to add users to your portal and assign them to different groups or branches.
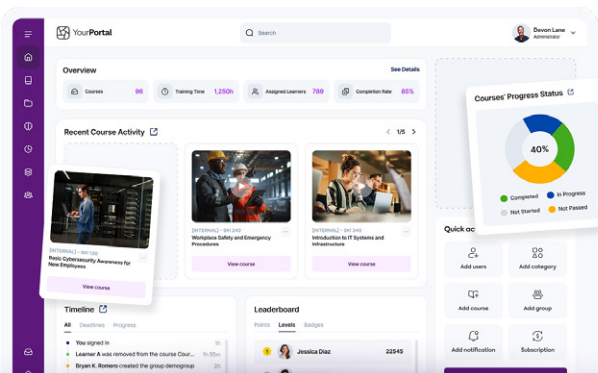
TalentLMS offers a range of features and tools to help you create, deliver, and monetize your courses. Set up your account, create your courses, and decide on the payment model you would like to offer to your users.

Customize your account

Customizing TalentLMS allows you to create a **branded** and **personalized** learning experience that aligns with your target audience's preferences. Customizing your training portal is about more than just changing its colors. It's about adjusting the look and feel of your portal so that it matches your brand and identity.

For a step-by-step guide, follow this article, or watch this webinar. It's recommended that you start customizing your portal by updating its logo and favicon by going to Account & Settings.

PRO TIP: Create content and choose an organizational structure for your portal before you start bringing users in.

Your logo is the first thing that people will remember about your company. It's located on the top left corner of your portal. It also acts as a Home button for your users, regardless of their user type.

The favicon is the little icon that appears on the browser tab.

In the Locale section, you can customize the default language, time zone, as well as the date format of your portal.

The changes you make here will also become the **default settings** for any user added to the portal.

Users can change their own language and time zone by hovering their mouse over their profile and clicking **my info.**

In the Course settings section, you can choose to enable "External course catalog" which would allow anyone who has access to the URL of your TalentLMS training portal to see your course offerings before logging into the portal to purchase courses. Next, visit the Users tab and choose the Sign up method for your training portal:

DIRECT
This will allow anyone with the link to your training portal to set up a user account by using the **Sign up** button.

This sign up method is recommended if you are looking to allow any individual who has access to the URL of your training portal to easily create an account in order to log in and purchase courses.

MANUALLY (FROM ADMIN)
This will remove the Sign up button from the training portal. Only Administrators will be able to create new users on the portal.

This sign up method is recommended if you would like to restrict the audience able to purchase access to your course offerings to the users you, as an Administrator, create on your portal.
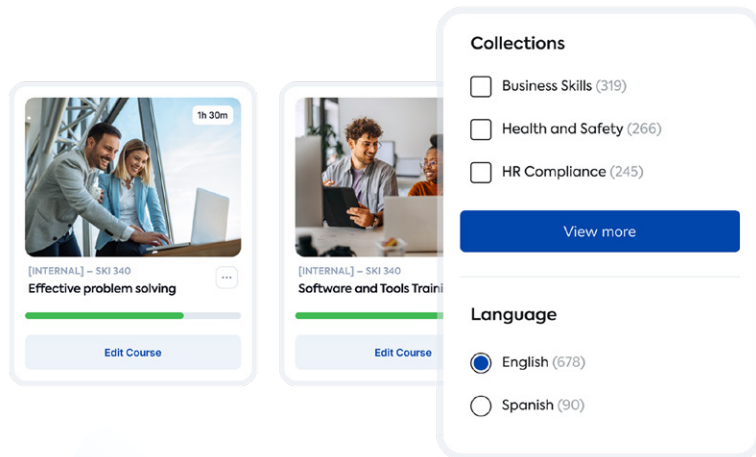
Before leaving the page take a moment to spot the **Default Group** feature which allows you to assign a core set of courses to all newly registered users automatically. **When selling courses,** it is recommended to only include the courses that you would like to offer free access to in the Default group. Newly registered users will get any courses included in the Default group for free.

A training portal should reflect an organization's look, so that your Learners feel right at home when they engage in your courses. You can achieve this by updating your **Themes** and **Homepage.**

Create courses:

The next recommended step is to create your future course library.

Collections

- ☐ Business Skills (319)
- ☐ Health and Safety (266)
- ☐ HR Compliance (245)

View more

Language

- ⦿ English (678)
- ○ Spanish (90)

[INTERNAL] – SKI 340
Effective problem solving

Edit Course

[INTERNAL] – SKI 340
Software and Tools Traini...

Edit Course

1h 30m

Selecting when a unit is considered successfully completed:

- **Simple checkbox**: a user will be able to click the button to complete and continue
- **Question**: your user has to correctly answer the question to complete the unit
- **After a period of time**: your Learner will need to wait X seconds for the unit to be automatically completed

Selecting the order in which the units should be completed

- **In any order**
- **In a sequential order**

Selecting the overall rule for reaching course completion

- **All units are completed**
- **A percentage of units is completed**
- **Selected units are completed**
- **Selected test is passed** (available only if a course has tests)

Consider adding tests and/or assignments between units in order to:

1. Assess knowledge and understanding
2. Reinforce the learning process
3. Foster higher training engagement
4. Provide your Learners with feedback
5. Build your Learners' confidence
6. Monitor and analyze progress

You can build out a learning path that consists of multiple courses that should be completed by Learners in a specific order of your choosing.

Make it a **habit** to test your courses as an Instructor before you publish them. When completing a course as Instructor, your records will **not** show up in user reports.

Prepare your portal for selling courses

1.

Set up the Currency

Go to Account & Settings and under Locale settings, find the currency drop-down list, and choose your currency. TalentLMS supports more than 20 currencies.

2.

Connect your Payment Processor

TalentLMS allows you to connect your **PayPal** or **Stripe** account. Every transaction will happen through your payment tool, and all the earnings will go directly to your account. TalentLMS does not have any transaction fees.

3.

Add prices to courses

Add prices to any course you would like to provide paid access to by editing Course Info. You can also use **groups** or **categories** to create Course Bundles with multiple courses and sell these as a package offer with a discounted price. You can additionall create **coupons** to provide discounts for specific courses.

Use of Bundles:

You have 10 courses of $10 each. If a Learner had to pay for each course to access them all, they would have to pay $100. But, if the courses are in the same category or a group, you can add a price to the bundle e.g. $80. This way, Learners can choose the bundle and save $20.

PayPal vs. Stripe

PayPal allows you to sell individual courses or Course Bundles.

Stripe, on the other hand, can be used to either sell individual courses/bundles or to offer access to all the courses for a subscription payment (monthly or annual).

In the latter case (subscription), make sure to add a price to each individual course so that the subscription price appears for them.

Otherwise, users will be able to get any course without a price for free. When subscriptions are enabled, no discounts apply to your paid courses and course bundles (i.e., categories, groups).

REMEMBER:

• When it comes to Stripe, you can only use the Stripe account linked to the main domain.

• If subscription payment is enabled, you cannot change the subscription fee as long as there is at least 1 active subscriber.

Branch and groups scenarios

Now it's time to decide on the structure for your portal. The decision to use branches or groups in TalentLMS depends on your specific needs, the nature of your training programs, and the audiences you would like to offer paid access to your course offerings to.

Begin by considering the audiences and the terms you would like to sell your courses under:

- Are you looking to sell your courses to a single or multiple audiences?
- Would you like to offer the same payment model to all your users or different payment options to different audiences?
- How many audiences are you looking to sell courses to?
- Are you considering offering paid access to courses to one audience while providing free access to the same courses to a different audience?

When would you need **Groups**?

When you want to:

- use the same login or sign up method for all users
- provide all users with the same payment method (either purchase of individual courses or subscription to all courses for a monthly or annual fee)
- bring together courses on the same subject or organize them as bundles
- allow Administrators to access existing reports across all groups
- allow Administrators to filter existing reports or list of users by group

When would you need **Branches** instead?

When you want to:

- choose a different login or sign up method for each customer or partner
- provide different audiences with different payment methods (allow one audience to purchase individual courses only, while having a different audience purchase a monthly or annual subscription to all courses)
- separate and restrict course offerings per audience
- offer different customization options (logos, colors, language, etc.) to different audiences
- allow certain Administrators to access reports of specific audiences only

talentlms

Here is how you can use Branches to provide different payment options to different audiences:

Main Domain	Branch A	Branch B	
stripe	stripe	stripe	One Stripe account linked to the main domain and used for each branch if needed.
PayPal	PayPal	PayPal	One PayPal account for the main domain and the same or different PayPal accounts for each of the branches.
stripe	PayPal	PayPal	One Stripe account for the **main** domain and **different** PayPal accounts for each of your branches (if you want to use **both** Stripe and PayPal).

Credits

TalentLMS also supports credits, a form of currency to purchase courses and handle off-site payments. You can add **credits** to all users, to the members of a group or branch, or to a specific user.

Use of Credits

Suppose you have 200 credits and you want to take a course on sales that costs 150 credits. You can use 150 credits from your account balance to enroll in the course. You will still have 50 credits left in your account balance that you can use for other courses.

KEEP IN MIND:

Each credit unit is equal to a single unit of your preferred currency, e.g. **1 credit = $1** if you have selected US dollars as your currency.

After Payment

Issue **invoices** and allow users to access and download payment statements.

Notifications and Automations

Under Events Engine, you will find Notifications and Automations that can help everyone stay on top of training.

By using **Notifications**, you can send automated emails to users so that they receive updates on activities happening on their training portal.

We've put together a few must-haves for you to create a robust notification system that your users can rely on to stay informed about the portal.

Select Recipient	Choose Event	Actual Behavior
Related user	On user create	Share the login details with the newly added users
Related user	On course assignment	Notify users they're assigned to new courses
Related user	X hours after course acquisition	Remind users to complete their courses
Instructor	On course completion	Notify Instructors when a course has been completed by a Learner
Instructor	On course failure	Notify Instructors when a course has been failed by a Learner
Instructor	On course self assign	Keep Instructors in the loop when users self-register to a course
Super Admin	On user create	Notify any member of the management of new users being added to the portal
Super Admin	X hours after user creation and the user has not signed in	Notify any member of the management there are still users that are not using the system, so they may want to reach out, remove, or delete them

Notifications and Automations

By using **Automations**, you can **set up actions** that the system will perform once specific criteria have been met. Most automations are designed to assign courses when another one has been assigned or completed; however, when selling courses, you can use the automation that allows you to deactivate a user account if a certain time has passed since a user signed up to your training platform but has not made a purchase.

Explore the available options and choose the automations that best suit your training needs.

Automations allow you to:

- streamline your training process
- enhance user engagement
- deactivate users who have not purchased any courses after a period of time to free up a user license
- improve administrative efficiency

Currently, Automations are available on *Premium* and *Enterprise* plans. If you need to **upgrade**, you can find more details about our pricing **here.**

Add users

Your portal is almost ready to accept users. You can add users one by one, or choose to **import users** to the respective groups or branches with an Excel file to save time.

Reports

Regardless of your training type, reporting is one of the most essential tools for a successful training program.

There are **many different types of reports** you could use to review, like User or Course reports.

Any report that can be downloaded can **also be scheduled** to be sent to specific recipients automatically.

You can **track payments** from the timeline feature on Reports, when you choose "User Payment" on the Events".

You also have the ability to create **Custom reports** (available on *Pro* and *Enterprise* plans). By combining **Rules** and selecting your **Output**, you will get a report tailored to your needs.

Mass actions in Custom reports: This feature allows you to perform an **action** on all the users included in the report. You can save time by sending a message to all users that meet specific requirements, activate/deactivate users, add them to courses, and more.

PRO TIP: Create custom reports and schedule them to be sent to any email, even to users that are not enrolled in your portal. This will give you control over who has access to your site and data.

talentlms

Thank you