Gating Setup Step-By-Step

ONEcount is a powerful gating/paywall solution that allows you to manage all of your business rules in the software, rather than hard-coding them into your web site Content Management system.

A gated resource or product is a URL that ONEcount will only allow web visitors to access if they are both known and subscribed to that product. These are two different concepts that must be satisfied in order for the visitor to access the URL.

If a user is "known" to ONEcount, meaning ONEcount has set the appropriate cookies and know who he or she is, AND the user is subscribed to the URL product or a package that contains the URL product, then when the user clicks on the URL, they will see the contents of the URL without any forms or authentication.

If a user is "known" to ONEcount and not subscribed to the product or a package containing the product URL, he or she will be directed to a subscription form that is pre-populated with their demographic information. They will be required to subscribe to the product or package, including processing a credit card if the product or package has a price attached to it.

If a user is "unknown" to ONEcount, this means that the appropriate cookies have not been set for ONEcount to identify the user. The user must first be identified to ONEcount. There are two ways to identify the user: the user can log into the system with a username or e-mail and their password. Or, the user can look up their account using information they may already know about their account. This "lookup" feature is ideal for ONEcount customers who have databases of users with no e-mail address on file. The Lookup feature allows users to look up their accounts with a customer ID and a zip code, or some other combination of personally-identifiable information.

This guide will walk you creating a gated web product, including setting up a form, merchant account, etc. The goal of this will be a gated asset that user's can subscribe to online.

Setup Demographics: First, you need to determine what demographic data you will collect about your users. ONEcount ships with a skeleton set of demographic questions, however, you can change those questions or add new questions to the system with the Demographics Tool under the Inventory Tab. Go to the Demographics Tab and set up the demographic questions you will use on your gating forms. You can learn more about Demographic Tool here.

Set Up Products: In order to gate content, you will need to create a "Product" that contains the URL you would like to gate. There are many different kinds of Products that you can create within the system. A section or URL product is what you need when you are gating content on the site. In order to create a gating product, you will need the URL(s) that you are going to gate, and a name for your product. Although ONEcount asks you for a default form for each Product, you will not be able to set that at this time because you haven't created any forms. However, once you do create a form, you will need to go back to the product definition and tell ONEcount, which form will be the "Primary" form for this product.

A primary form for a product or package means that, absent any other offers, when a web site visitor clicks on a URL, which form should be shown to that user.

To learn how to setup products, click here.

Set Up Packages: A product is a single element that ONEcount will manage, such as a newsletter list or a web site section or a URL. A package is a little bit different. A package is a collection of one or more products, combined one or more terms. A term is a combination of subscription length and a price. The price on a term can be zero. So to rephrase, *a package is a collection of one or more products combined with a subscription length and possibly a price.*

To learn how to set up packages, click here.

Set Up Source Codes: Source codes provide a way to track transactions from users. A source code can be used to track campaign effectiveness, to differentiate between different offers of the same product, or to qualify and quantify users for a circulation or postal audit. Source codes are very simple string values. You should not use spaces or punctuation in a source, but every transaction or subscription in ONEcount requires you to have a source code. You will need a source code to build your subscription form so that ONEcount can track transactions through that form. To learn more about source codes, how to set them up and how they are used, click here.

E-mail Configurations: When your forms are submitted, you may want to send users e-mail confirmation of their subscriptions or transactions. The e-mail is defined within the form definition, so you can create very specific confirmation e-mails for every offer. However, there are default configurations that must be configured first. These are done in the Config Manager under E-mail Configuratons. Most importantly, you will want to set the "From" name that your messages will come from. Config Manager is under Utilities on the main menu. To learn more about the Config Manager, click here.

Set Up A Brand: A brand is technique ONEcount uses to wrap your web site's look and feel around a form or process page (such as a Thank You page, a Password Reset page, etc,.) You may even want to apply a Brand to a form that you build with the ONEcount form builder. The Brand will present the look and feel of the site the web visitor is interacting with on the ONEcount forms. Brands can be applied two days: By ONEcount based on the URL a web site visitor is on at the time they are directed to the form, or based on a URL parameter defined in a link to one of your forms. You would typically use a brand or a set of brands when you have multiple web sites that share a common ONEcount installation. So if you have two web sites, ABC.com and XYZ.com, and both sites use ONEcount form 12345.html as a subscription form, you can configure ONEcount to display the look and feel of ABC.com on form 12345.html when a user visits the form from site ABC.com, and the look and feel from XYZ.com on form 12345.html when the user visits the form from site XYZ.com. A brand is easy to set up, but will require your web development team to host a page on your site that ONEcount can fetch periodically. This is done so that if you change the look and feel of your web site over time, that updated branding will automatically be carried over to your forms. You can learn more about setting up a brand here.

Set up Merchant Accounts: If you are going to charge customers to access your content, you will need to make arrangements with a merchant processor to process credit cards online. ONEcount supports PayPal's PayFlow Pro, Intrix, and Authorize.NET. Once you have set up your merchant account, you can enter the credentials in the Merchant Account Manager under Inventory. You can have multiple merchant accounts in a single ONEcount install. When you build a form, you will be able to select which merchant account to use for that form. To learn more about setting up Merchant Accounts, click here.

Set Up Forms: Next you will need to set up for forms. The Form Builder is in the Inventory section of the site. You can design forms as stand-alone forms, landing pages in which the user is presented with a number of options and clicks one and then goes to the actual subscription form, or you can design a form that is in a pop-up window. You very likely will have multiple forms for different offers and campaigns, but you must have at least one form in order to gate content. You can learn about building forms here.

Login/Lookup Page: Once you have a form that visitors can use to register or subscribe to your gated product, you've got one other thing to worry about: what happens to users who are already in my database who are subscribed to my product though an outside source? What happens to users who are already known and subscribed when they visit my site on a new device, or after deleting their cookies? That is where the Login/Lookup comes in. The Login/Lookup page is responsible for identifying a user and logging them in, sending them to a subscription page if they are not already subscribed, or sending them directly to the gated product if they are. The Login/Lookup page does a lot of work behind the scenes, so it's important to make sure it is set up correctly. You can find out more about how to make sure Login/Lookup is set up correctly here.