How-To Info:

Here are step-by-step instructions on how to to perform various tasks with ONEcount.

Segment & Target Users

To target a specific group of users within your audience, simply create a segment and then tie a specific action to that segment.

The process involves four steps, all of which tie together to form a single targeting solution.

Here are some examples of targeting scenarios you might find useful:

Target your customers based on the types of products they have purchased

Target users who have visited your web site X times

Target users who have abandoned a ONEcount form

Target users who are expiring and have not renewed their subscription

Create a Lead-Gen Campaign for an Advertiser or Sponsor

Target new customers with an e-mail

Convert Readers Into Advertisers

Advertiser Report: Provide Advertiser's With a List of People Who Saw Their Ads

Set Up Registration, Gating & Paywalls

Here is a list of steps required for gating, paywall and registration.

1) Create Required Demographic Questions: Add any specific demographics required for your installation

2) Create Source Codes for transactions: Source codes are used to track the source of a transaction. You'll use these to figure out where your registrations are coming from

3) Create Products for web site gate: A product is an asset that is protected by ONEcount. It can be a web URL, a newsletter, a file, etc.

4) Create Packages for web site gating and other products: A package is a collection of products plus one or more terms. So if you want to create a bundle of two products, or one or more products for a specific time-period.

5) Set up merchant gateway if needed: If you are going to accept credit card payments for your registration/subscriptions, you will need to select one of our credit card processors.

6) Create Subscription/Registration form for web products: These forms will automatically appear when a user clicks on a gated asset

7) Configure Thank You e-mails for forms (in form builder): These are defined in the form builder. They can also be configured globally in the Config Manager on the Utilities Menu

8) Create brand for lookup/login pages and thank you pages: (SEE ALSO) The brand impacts a lot of automatically-generated pages, like the login/lookup page, the Thank You page after transactions are executed (explained here), etc.

9) Create a customer preferences form: This is basically a form where the user can update their information and subscribe/unsubscribe to products.

10) Create Login/Logout links on the web site: These are embedded in your web site.

Other stuff you will need

Sample Paywall Flow: Free Registered Paid

Using ONEcount in a Single Sign-On Environment: SAML Server

How to SFTP To ONEcount

In order to comply with security protocols, ONEcount doesn't allow connections via FTP, only SFTP. For info on how to connect from Mac or Windows, check here.

Target