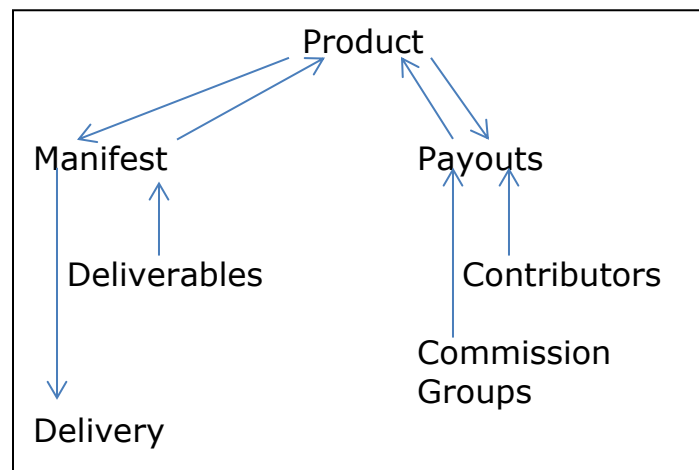# What You Will Need: An Overview

Automating the AreteX eCommerce Services is relatively straight-forward once you understand the process and how everything works together. This document is designed to give some practical tips on making your setup more efficient. (Note: The Wizards in Setup are also good tools to generally familiarize yourself with the features and functions of AreteX.)

If you need a re-fresher on certain steps, use these internal hyperlinks:

Once built, the flow-through use for AreteX follows this simple design:

(Key: Up arrows show Product assembly.
Down arrows show outflow to customers and payees.)

I.   Pre-Populating Components

The first step in the process of building your product into AreteX is to create the "pre-fab" or pre-populated components. These include your general

Payee Table, Offers, Source Media, Commission Groups, and Contributor Payout Templates.

A. **Payee Table** – This is a listing of every person you will need to pay because of a sale of product, membership, or subscription. This is a general list, as persons may be getting both a commission and a royalty.

Where Is It? – *Reports & Management / Payees / Payee Management / Add*

What You Will Need
- Contact information such as name, email address, phone, and mailing address. The Payment, Tracking and Reporting (PTR) feature for you and your payees is built from this.
- WordPress User Name
- If using Direct Deposit, a valid bank account the person fills out themselves and submits to AreteX through the PTR.
- As AreteX usually pays non-employee types, you will eventually need a W-9 from each person. AreteX will not send funds to anyone over $300.00 without this form. There is a checkbox you will need to select when you receive this form. It is located in the PTR.

B. **Offers** – These are the types of discounts you plan to offer, and/or the way to track your marketing efforts. AreteX also uses them to appropriately pay your Referrers (sales force, affiliates, etc.).

Where Is It? – Go to *Catalog & Products / Coupons & Tracking / Offer Codes / Add* (This is also the place where you may edit.)

What You Will Need
- Know the type(s) off general offers you want to use (10% off everything, Regular Price, etc.)
- If you want to offer a limited time discount, know the date you wish to stop the Offer.
- Note that if you have not set up Commission Groups yet, the Offer you are creating will be for everything. You may go back and edit this as you wish.

C. **Source Media** – These are the places you will be placing your Offers (such as website(s), business cards, radio spots, etc.)

Where Is It? – Go to *Catalog & Products / Coupons & Tracking / Media Source / Add* (This is also the place where you may edit.)

What You Will Need

- Know what media you will be using.
- Add a description that is meaningful for you.
- You may edit later.

D. Commission Groups – Referrers (commissioned sales force, affiliates, etc.) are paid according to the Commission Group they belong to.

Where Is It? – *Setup / Payouts / Commission Structures / Add*
What You Will Need
- Know the percentage off you wish to offer (to simply track marketing efforts, 0% is valid)
- Know what type of offer it is (i.e., commission, promotion, affiliate, etc.)
- Use a name that is easily recognizable for you.
- You may edit later.
- Note that assigning an Offer to a Commission Group will automatically fill that Commission Group into the Offer for use.
- You may next assign payees to your Commission Group(s) as appropriate.

E. Contributor Payout Templates – Contributors to your product will be associated with a Deliverables Payout Plan that uses a template. This includes a % of gross or net, or even a fixed amount.

Where Is It? – *Setup / Payouts / Contributor Payouts / Add*
What You Will Need
- Know the different types of payout templates you wish to have set up for your contributors (i.e., royalty, instructor fee, editor fee, etc.)
- Build at least one template for each type.
- Know what you wish to pay using a particular contributor template.
- These may be edited later.
- Note that Contributors are simply listed as Payees until they are associated with a Deliverable Payout Plan, which includes a payout template.

II.   Building Blocks

A. **Deliverables** are built from components you have pre-populated along with a record of the product or membership subscription you expect to sell. And because timing can be everything, AreteX allows a

granularity of date and time for each Deliverable so that you have greater control of the availability of the pieces of your Product.

i. **Paid Content** –

Where Is It? – *Catalog & Products / Delivery Specifications / Deliverables / Paid Content*
What You Will Need
- Contributor Payout Template
- Payee(s) on the General Payee Table
- Commission Groups if applicable
- Start/End Date and Time if applicable
- May be edited afterward.

Going through the Paid Content Wizard in *Setup* is a good way to gain familiarity with these building blocks and how they are used in a Paid Content Deliverable. At the end of that wizard you will have a product shortcode that can be copied and pasted into your WordPress editor.

Note 1: There is a difference between a product shortcode and a paid content deliverable shortcode. If you have only 1 deliverable in a product, it can seem to be identical. However, the instant you have more than 1 deliverable in a product the difference becomes evident.

Note 2: If you have entered into the Paid Content Deliverable builder through the *Catalog and Products* string, you will notice a "Buy Button" tab next to the Paid Content tab. For the simplest products, these functions can seem very similar in the shortcodes they create. Be sure to read through the overviews for both of these tabbed features to understand the differences.

ii. **Paid Membership**

Where Is It? – *Catalog & Products / Delivery Specifications / Deliverables / Paid Content*
What You Will Need
- Contributor Payout Template
- Payee(s) on the General Payee Table
- Commission Groups if applicable
- Start/End Date and Time if applicable
- May be edited afterward.

Going through the Membership Wizard in *Setup* is a good way to gain familiarity with these building blocks and how they are used in a Membership

Deliverable. At the end of that wizard you will have a product shortcode that can be copied and pasted into your WordPress editor.

Important Note: There is a difference between a membership product shortcode and a membership deliverable code. The membership product shortcode is actually a buy button for your customer to purchase a membership. The membership deliverable code is a code used to build a manifest to ensure delivery of access to the membership or subscription. There **is no** shortcode for a membership deliverable.

Note 1: A WordPress role must be created before creating this deliverable. This is because AreteX integrates with your WP Roles and Capabilities setup.

Note 2: Shortcodes used for Paid Membership buy buttons differ from those used for Paid Content. (See *WP Integration / Shortcodes & Widget / Product Presentation / Membership* for details.)

B. Manifests

Where Is It? – *Catalog & Products / Delivery Specifications / Manifests*
What You Will Need
- Paid Content Deliverables
- Paid Membership Deliverables

Manifests are built from *Deliverables*. It is the Manifest that contains all the pieces or items (*Deliverables*) that will be sold as a whole *Product*. It is also the Manifest that holds the record of delivery for each Deliverable, assuring the appropriate delivery schedule of the different Deliverables in a timely fashion.

Important Note: There may be instances in which you need to add a Contributor payout to a full product (all deliverables put together). To add a Contributor Payee to a Manifest go to *Catalog & Products / Products*. Choose a Product and select the Actual Contributor Payouts layer at the bottom of the *Products* screen.

III. Product Assembly

Where Is It? – *Catalog & Products / Products / Add (or Edit)*

The assembly of your product(s) is done either through the string listed above, or through the Paid Content / Membership Wizard in *Setup*. Any editing of a Product is done within the string listed above. Assembly will allow you to select and fully integrate the appropriate Deliverables within AreteX to automate your sales, delivery, reports, and payouts.