

Systeme.io Setup Simplified

LAUNCH YOUR DIGITAL BUSINESS IN ONE WEEKEND — FREE FOREVER PLAN, STEP-BY-STEP.

If you've ever felt lost setting up your systems, I get it - I broke mine twice before figuring out what actually works. That's why we built this: a shortcut guide you can follow while you build.

No videos. No guesswork. Just screenshots, steps, and results, all using the **free forever version of Systeme.io**.

escape
innovations

Escape the Grind. Work Smarter.

Why Systeme.io (& What You'll Build)

Systeme.io replaces 5+ tools – website builder, funnel creator, email platform, checkout system, and course host in one clean dashboard.

By the end of this guide, you'll have:

- ✓ A verified Systeme.io account
- ✓ Your first funnel (opt-in + thank-you)
- ✓ An email automation running
- ✓ A free course ready to deliver

All on the free plan.

NOTE* Follow each step in order. Pause and test after every section.

Systeme.io Setup Simplified

(Interactive Navigation Map)

This page serves as your clickable “Control Center.” You can click each module name to jump directly to that section. Think of it as your in-guide dashboard.

MODULE
Pages 1-3

[WELCOME & OVERVIEW](#)

MODULE
Pages 46-63

[PREPARE WHAT YOUR
FUNNEL WILL SEND](#)

MODULE
Pages 4-9

[CREATE YOUR FREE ACCOUNT](#)

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Pages 64-65

[HOW TO GET YOUR FUNNEL
LINK](#)

MODULE
Pages 10-12

[SET UP YOUR SYSTEME.IO
DOMAIN](#)

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[HOW TO ADD AUTOMATION
TO YOUR FUNNEL](#)

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Pages 13-27

[CREATE YOUR FIRST COURSE](#)

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[TEST & SHARE YOUR FUNNEL](#)

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[BUILDING YOUR LANDING
PAGE & THANK-YOU PAGE](#)

MODULE
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[YOU DID IT](#)

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[DESIGN & COPY GUIDELINES](#)

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Create Your Free Account

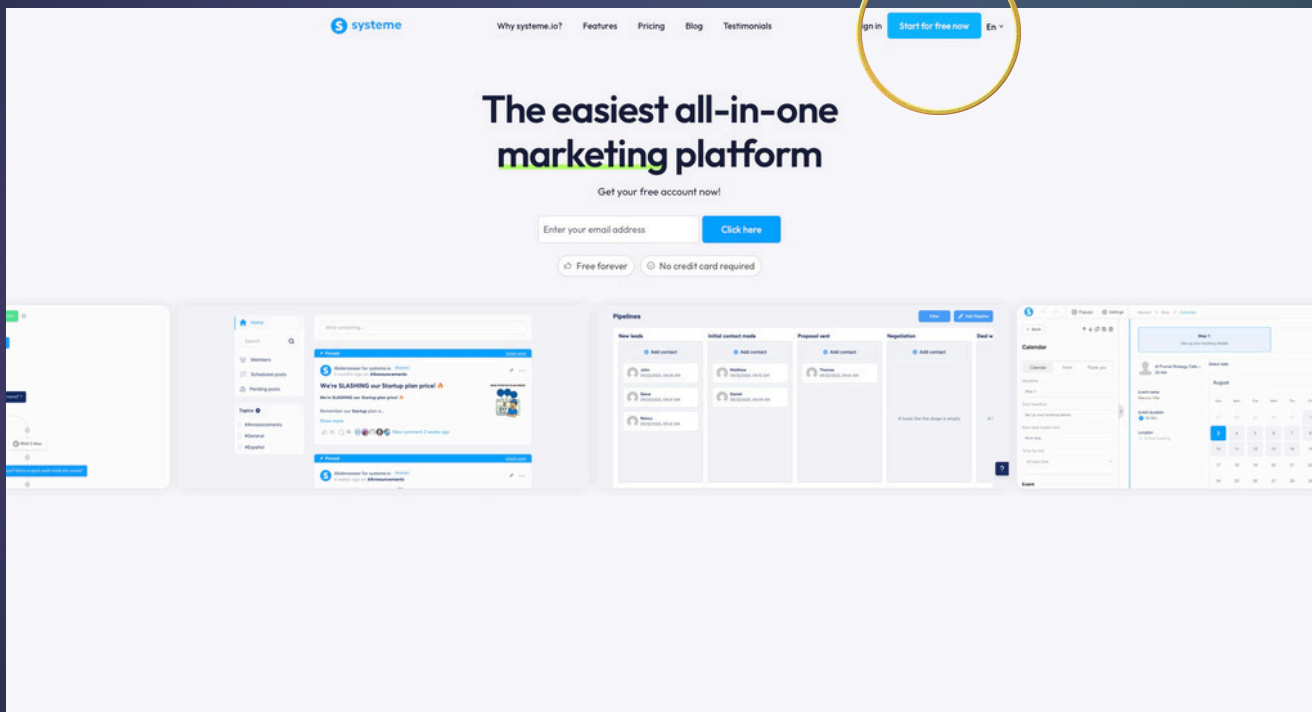
Let's set up your Systeme.io account.

1

Click [[this link](#)] to create your free Systeme.io account

2

Choose "Start for Free."



Create Your Free Account

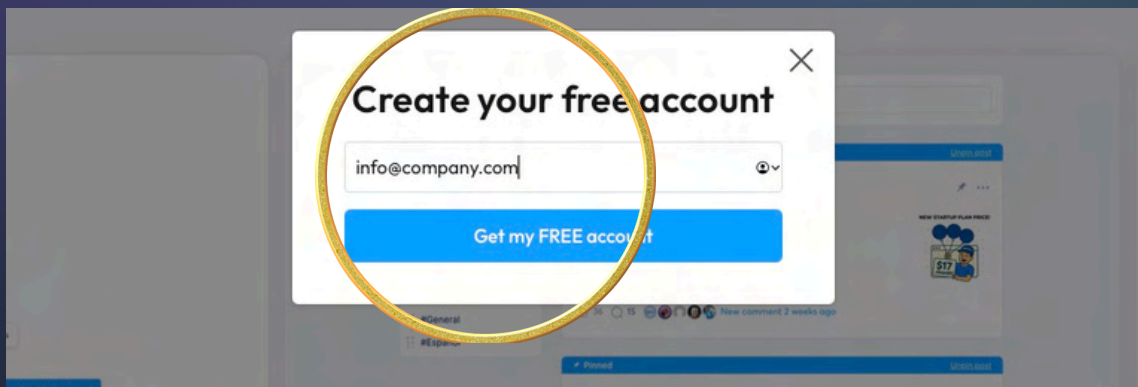
Let's set up your Systeme.io account continued.

3

Enter your email. Important: You can create your Systeme.io account with any email address even gmail, but for your sender email (the one used in automations—we will go over this later), **always use a professional domain email** – like info@yourdomain.com. Gmail and Yahoo can cause deliverability issues because they can't be verified with DNS records.

Pro Tip: Set up your domain email through Hostinger (optional)– it's affordable, integrates perfectly with Systeme.io, and right now they're offering a free domain name + free email for one year with a 48-month plan (for about the same cost others charge for just three months).

You'll still be using Systeme.io's free plan – this just gives you a trusted sender email for better deliverability and a more professional brand presence. [Get Your Domain + Email Here → [HOSTINGER](#)]

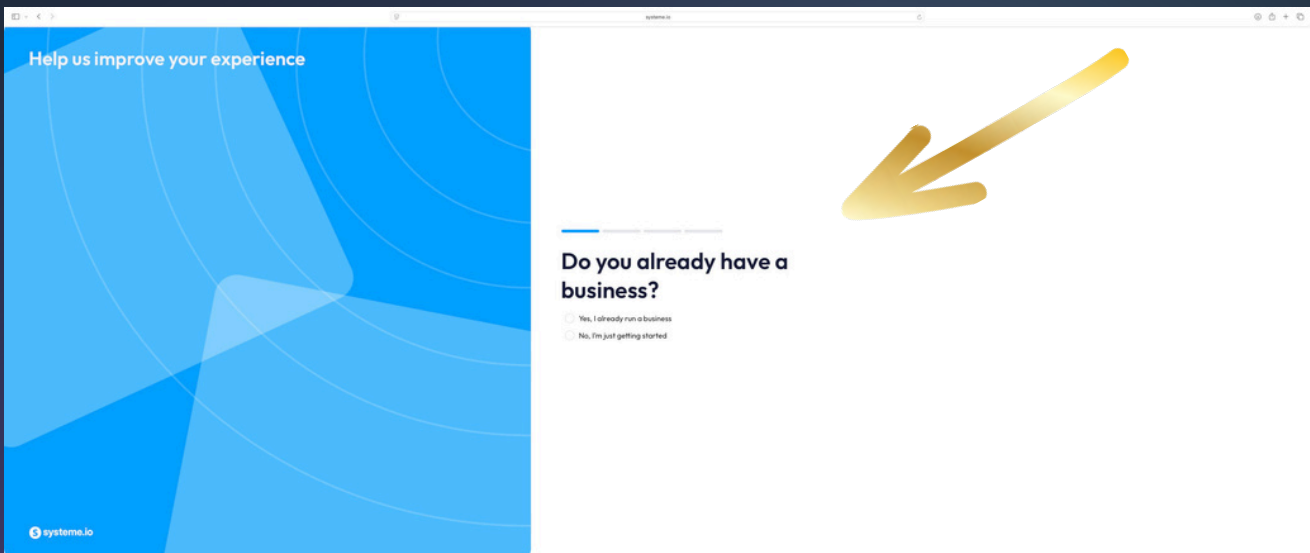


Create Your Free Account

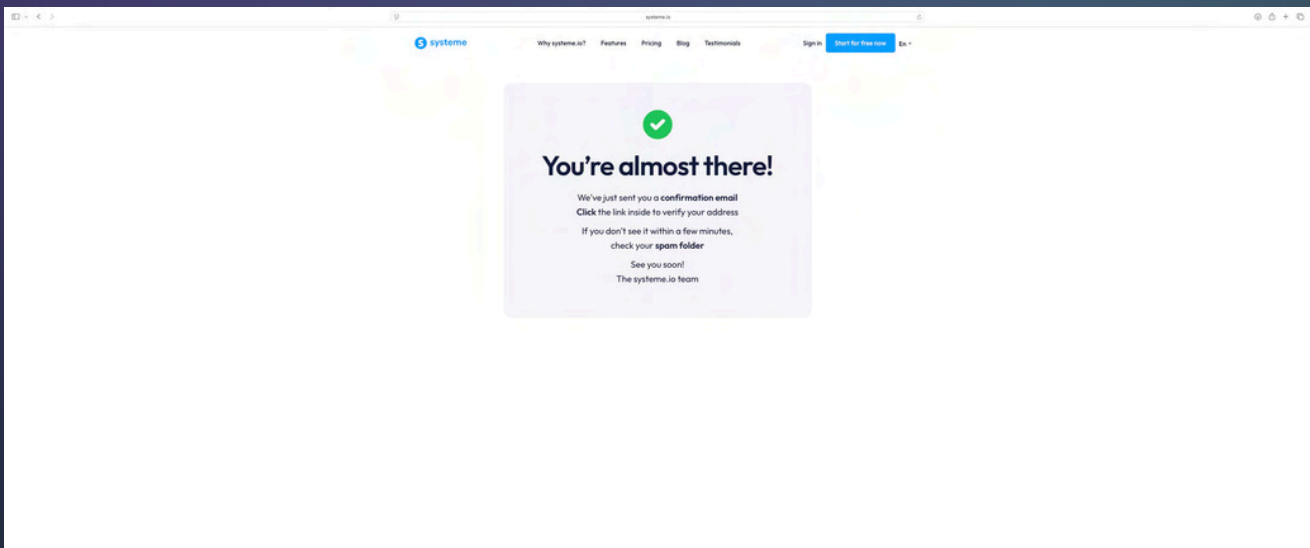
Let's set up your Systeme.io account continued.

4

Follow the on screen prompts.



Once you get to the screen below, exit out and go to your email. Click the confirmation link that Systeme.io sent you.

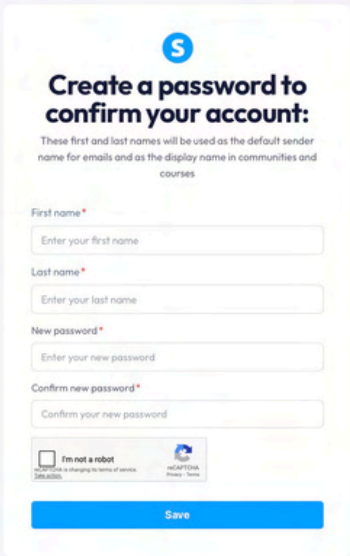


Create Your Free Account

Let's set up your Systeme.io account continued.

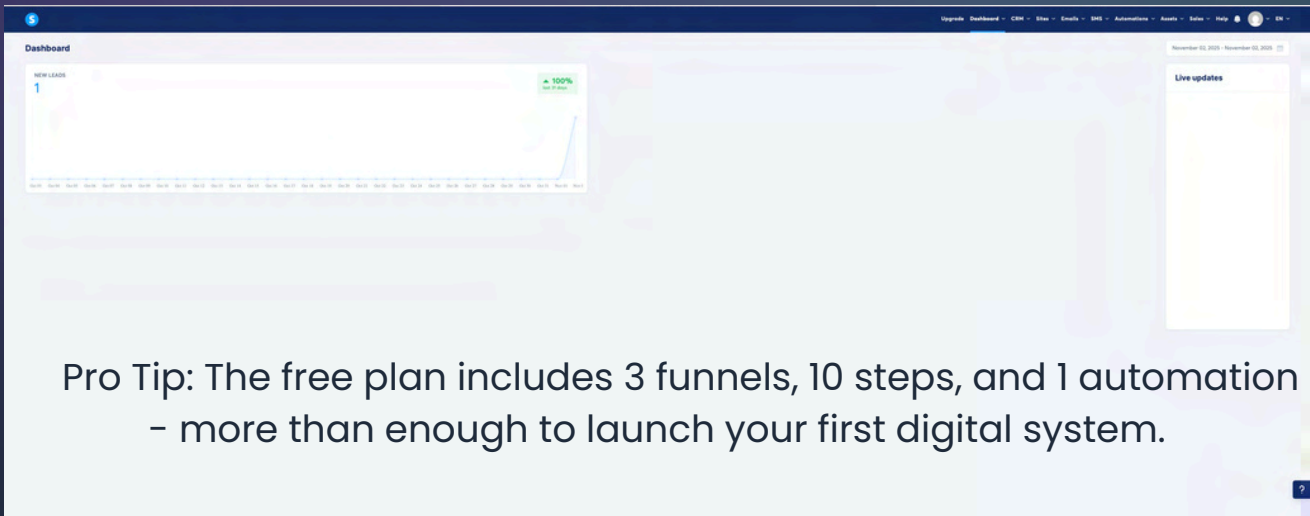
5

You will then create your password and confirm your account.



The screenshot shows a web form titled "Create a password to confirm your account:" with a blue 'S' logo. Below the title, it states: "These first and last names will be used as the default sender name for emails and as the display name in communities and courses". The form contains four input fields: "First name*", "Last name*", "New password*", and "Confirm new password*", each with a placeholder text. Below the fields are two checkboxes: "I'm not a robot" and "reCAPTCHA". A blue "Save" button is at the bottom. A large yellow arrow points from the right towards the form.

You will be taken to your dashboard.



Pro Tip: The free plan includes 3 funnels, 10 steps, and 1 automation - more than enough to launch your first digital system.

Dashboard

Meet your new Digital HQ

Your Systeme.io dashboard is where everything happens. Inside your dashboard you'll find:

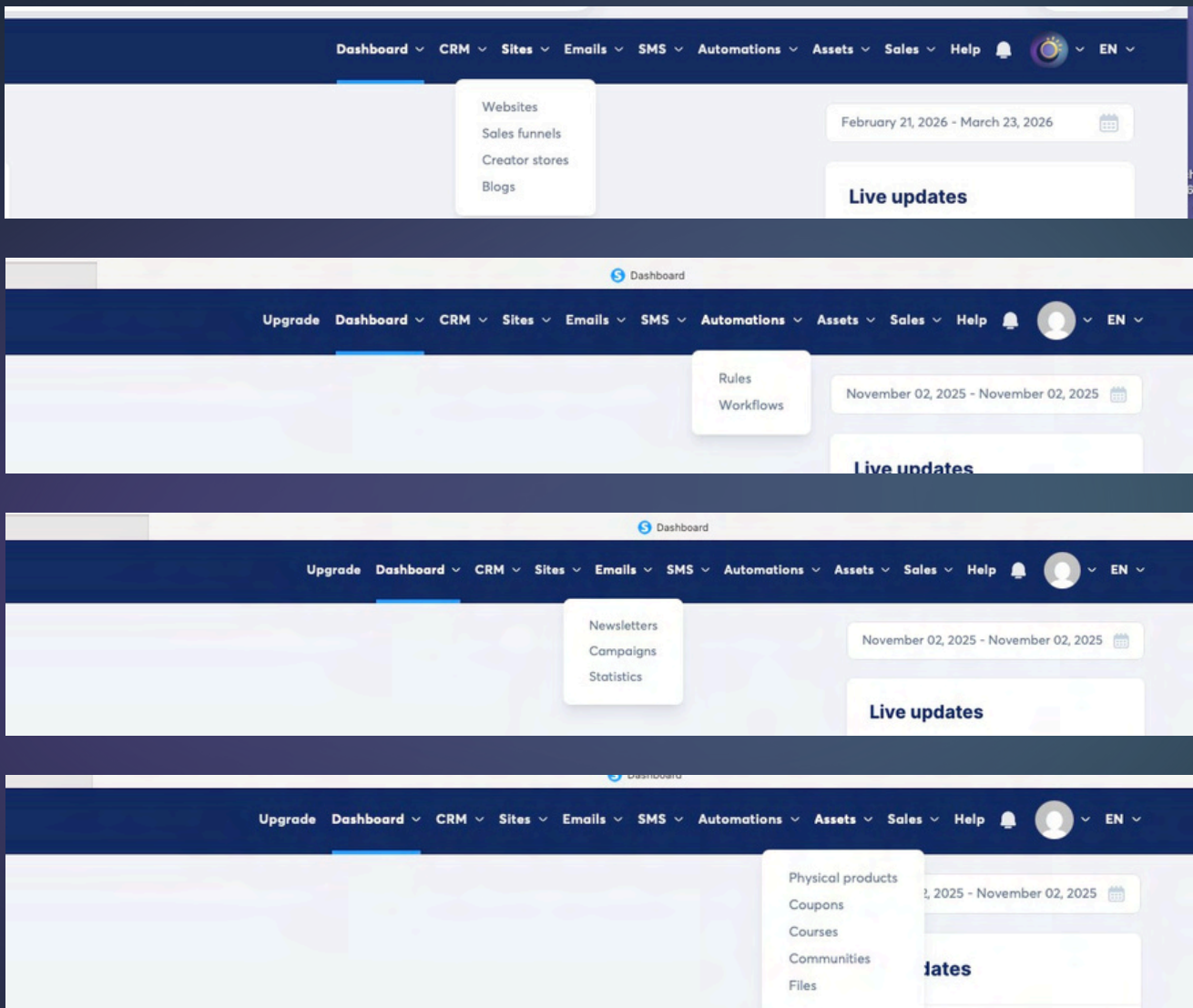
- ✓ Sites: Create pages and offers
- ✓ Emails: Send campaigns & sequences
- ✓ Automations: Triggers & workflows
- ✓ Assets: Courses & offers
- ✓ CRM: Contacts, Subscribers & tags

You can also create your landing page so everything is within this one platform! Making it so much easier to manage when starting your business.

Dashboard

Meet your new digital HQ continued.

As we walk through the next steps, you will learn where everything is and its purpose.



You've now created your account and accessed your dashboard.

Set Up Your Systeme.io Domain

Your first web address – free and instant

When you create your Systeme.io account, you'll be asked to choose a free subdomain, this becomes your personal web address inside Systeme.io.

Example: yourname.systeme.io

You can use this free domain to:

- ✓ Build and share your funnels and landing pages
- ✓ Create your first course

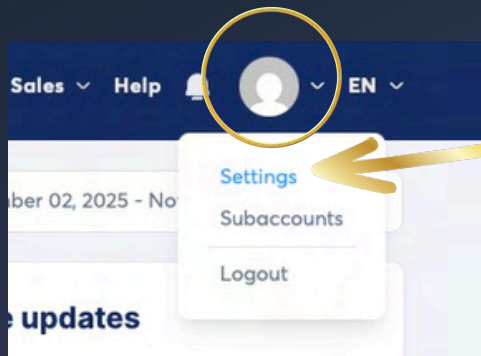
However: To send automated emails (like your welcome or follow-up sequences), you'll need a verified sender domain. That means having your own website domain – like yourbrand.com – so Systeme.io can verify your SPF/DKIM records for deliverability. Your email is tied to this main domain name (ex. info@yourbrand.com). We go over this later in the course.

We do recommend securing your domain and professional email from a provider of your choice before you sign up for Systeme.io. It makes setup smoother from the start.

Set Up Your Systeme.io Domain

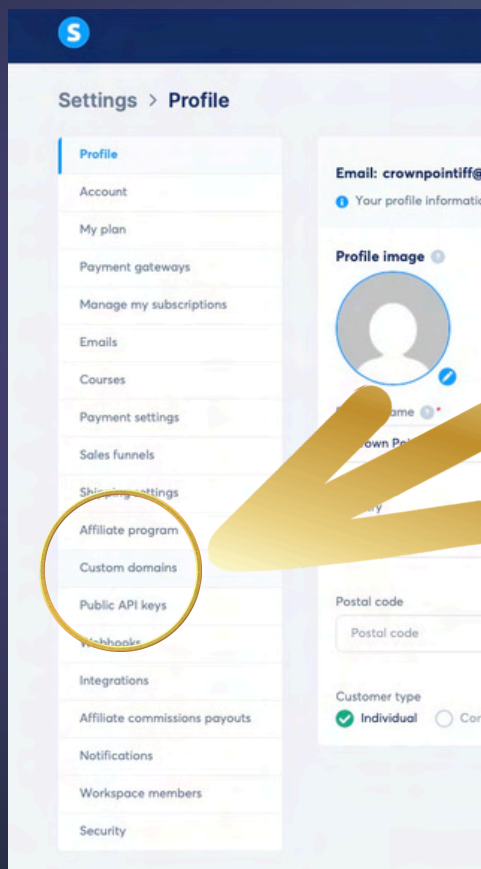
Steps to create your subdomain name in Systeme.io continued.

1



Click your profile icon then settings

2

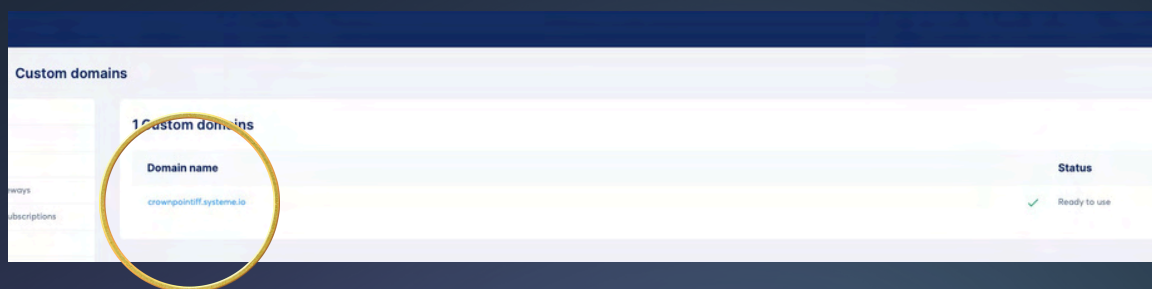


On the left panel click "Custom Domain"

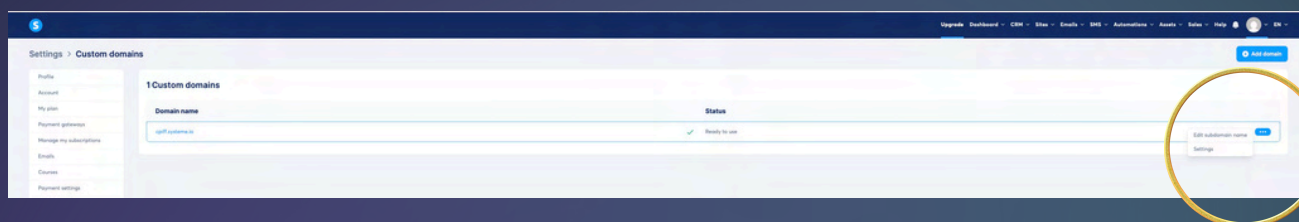
Set Up Your Systeme.io Domain

Steps to create your subdomain name in Systeme.io continued.

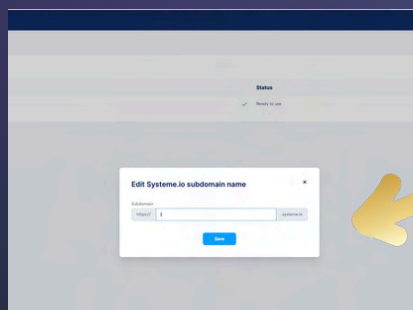
3



- You'll see your default subdomain: yourname.systeme.io
- This works immediately for publishing pages/funnels/courses



You can rename the subdomain (optional), click the three dots/edit custom domain, then type in your desired name. You only get this ONE subdomain with the free account.



- Keep it short, brand-ish: freedomhub.systeme.io
- Click Save

Troubleshoot

- If "subdomain already taken," try a short brand variant or add "hq," "lab," or "studio"

Create Your First Course

Before building your automated system, you need something to deliver.

Your product could be:

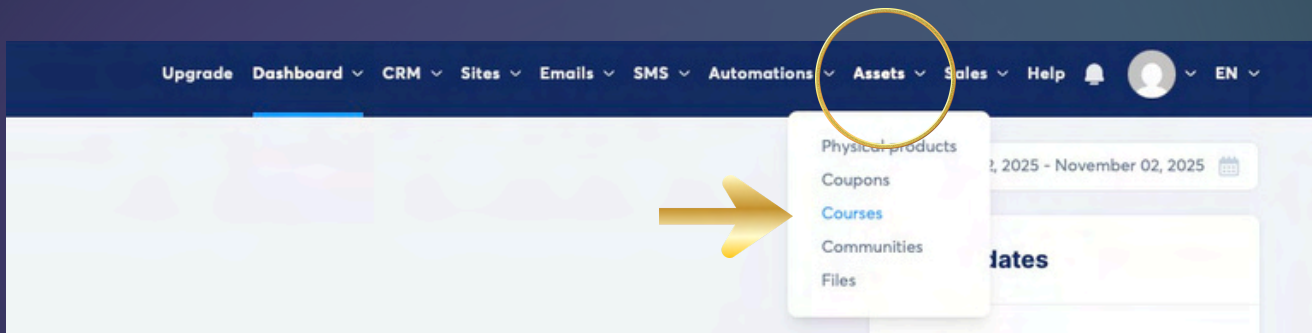
- A short PDF guide
- A mini text-based course
- A checklist or workbook
- Video and text-based

Your goal: Help your audience take one small step forward.

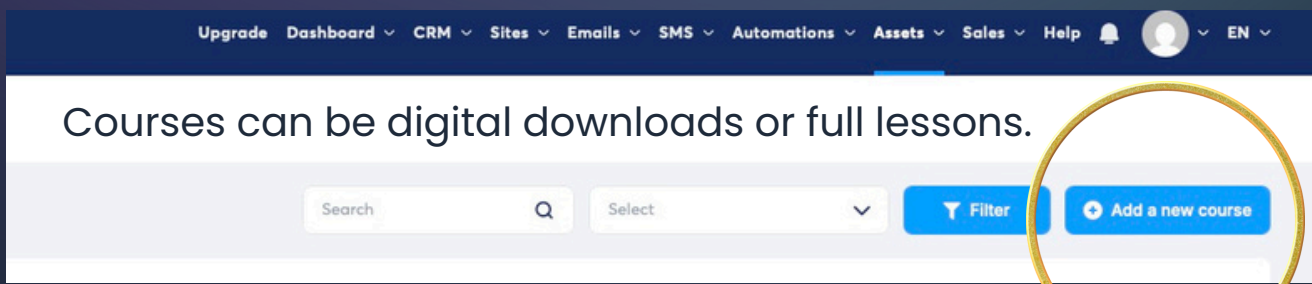
1

How to create it in Systeme.io:

Go to Assets → Courses



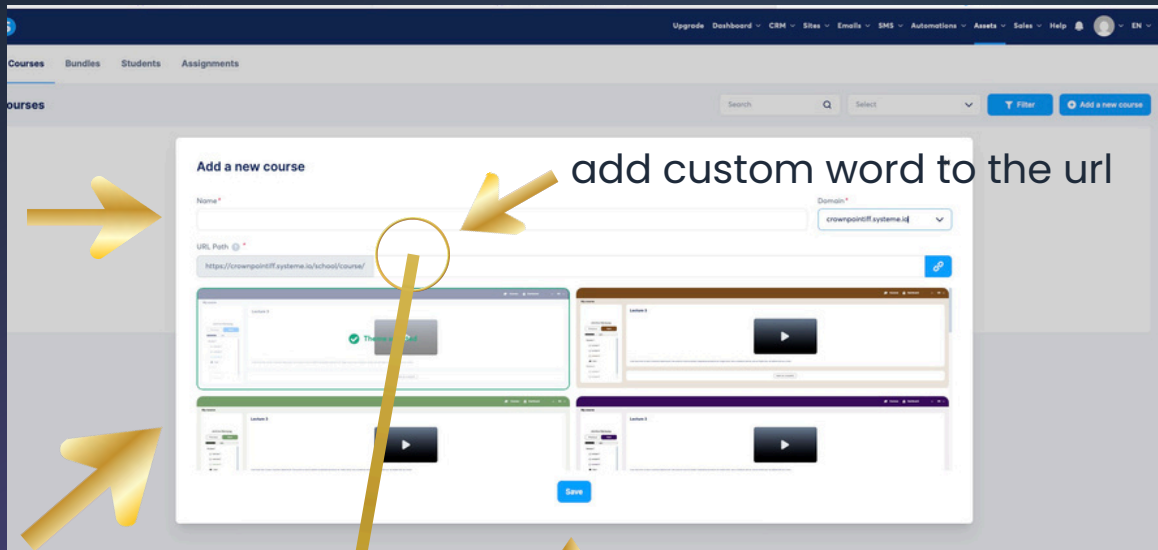
Click → Add New Course



Create Your First Course

2

Name it



add custom word to the url

Choose a template
(defaults have video
but you can remove)

Last Click Save

Customize Your URL:

Change the URL path to something short and clear (example:
myfreecourse or toolkit).

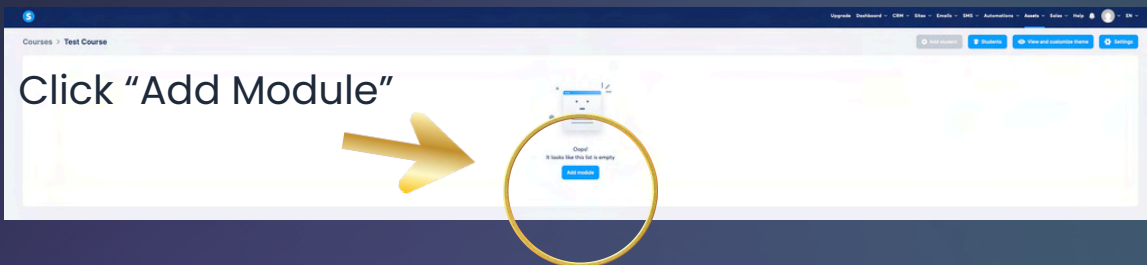
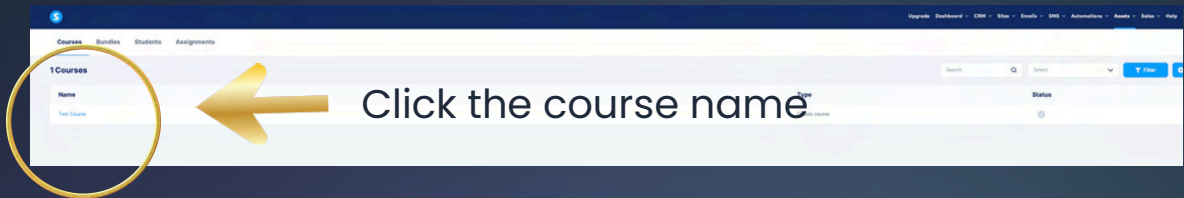
This becomes your shareable link:

<https://yourname.systeme.io/myfreecourse>

Keep it simple - no spaces or special characters.

Create Your First Course

3



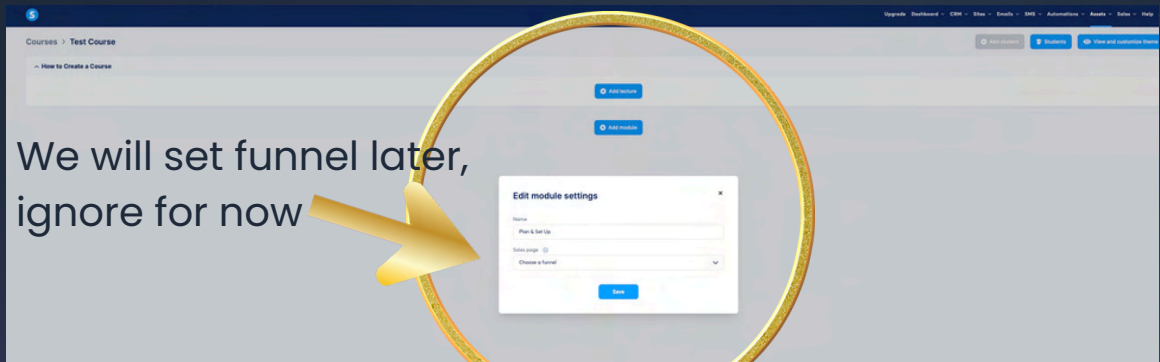
You will then name your first module in the course. This is the main topic for your first module. You then can create separate lessons (systeme.io calls them lectures) in each module. This step is basically entering your outline of topics for your whole product or course. Before building, be clear on your tools and structure.

Example: Build Your First Digital System

- ├─ Module 1: Plan & Set Up
 - | └─ Lesson 1: Choose Your Tools
 - | └─ Lesson 2: Map Your Offer
 - | └─ Lesson 3: Set Up Your Account
- └─ Module 2: Build & Launch
 - | └─ Lesson 1: Create Your Landing Page
 - | └─ Lesson 2: Connect Your Thank-You Page
 - | └─ Lesson 3: Add Your Email Automation

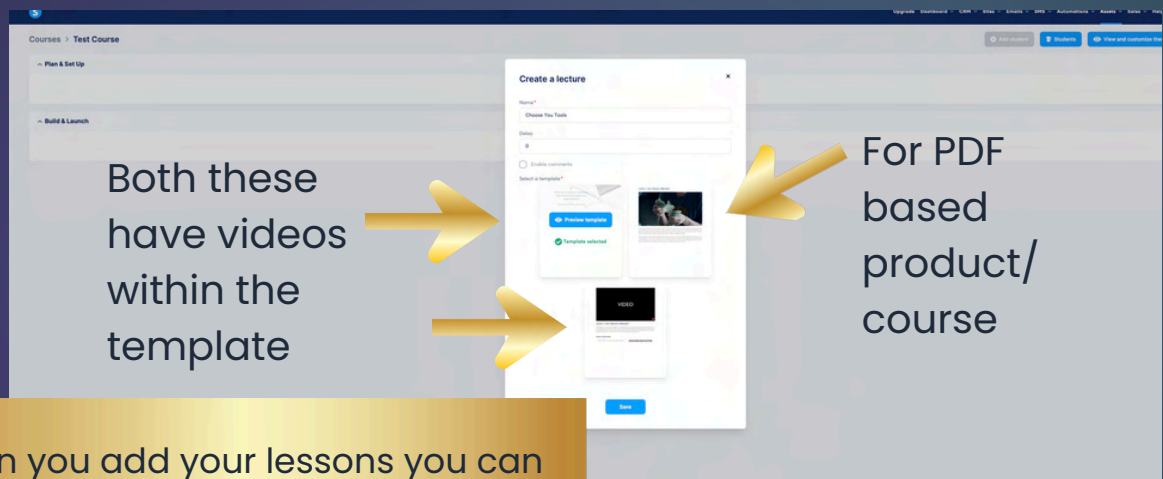
Create Your First Course

4



We will set funnel later,
ignore for now

Continue adding the Modules and Lessons (lectures) you want for your product/course outline.



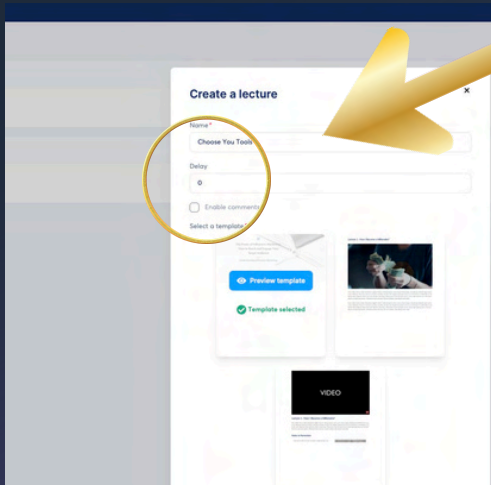
Both these
have videos
within the
template

For PDF
based
product/
course

When you add your lessons you can preview the templates before choosing. There are 3 to choose from. Two have videos incorporated and one is image and text based only. Once you select the template you can customize as you deem fit for your product and brand.

If you want to save time, we have a full course template you can get on our Etsy shop and edit an existing course template and not build from scratch.

Create Your First Course



That “Delay” box in the “Create a lecture” window (when building your course in Systeme.io) controls when that lesson becomes available to the student/customer after they enroll for the module.

What the “Delay” Field Means

Delay (in hours) = how long Systeme.io waits before showing that lesson to your student.

- 0 means instant access (lesson is visible right away).
- 24 means the lesson unlocks 24 hours later.
- 72 means 3 days later, etc.

When You’d Use It

For Drip Courses

If you want students to go through your course slowly – one day or module at a time – you’d use delay.

Example:

- Lesson 1 (Delay 0) → available immediately
- Lesson 2 (Delay 24) → available 1 day later
- Lesson 3 (Delay 48) → available 2 days later

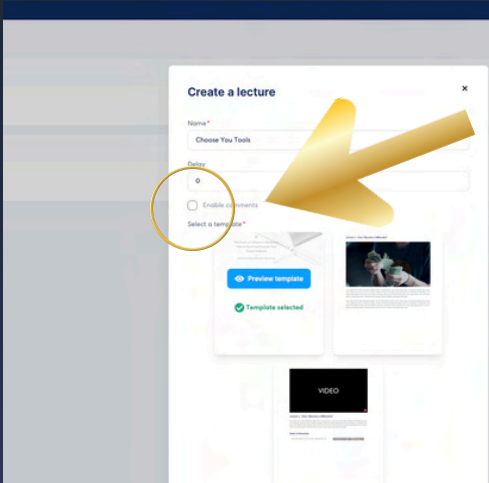
This keeps engagement high and prevents students from skipping ahead.

For Instant-Access Freebies or Courses

If your goal is to give them all the lessons at once, just leave “Delay” at 0 for every lesson.

That way, when someone clicks your course link, they can view all modules and lessons immediately.

Create Your First Course



When you check the “Enable comments” box for a lecture (lesson), it adds a comment section at the bottom of that specific lesson page, kind of like a mini discussion area.

What “Enable Comments” Does

It allows your students (or members) to:

- Leave public comments or questions about that lesson
- See and reply to each other’s comments
- Get notifications when you (the creator) reply

Think of it as a mini “community chat” inside your course.

When to Use It

Turn Comments ON if:

- You want engagement, feedback, or discussion.
- You’re teaching an interactive course where students might get stuck and ask questions.
- You plan to check Systeme.io regularly and reply to comments.

Example:

In your course later, comments will make sense, students will want to ask tech setup questions and share results.

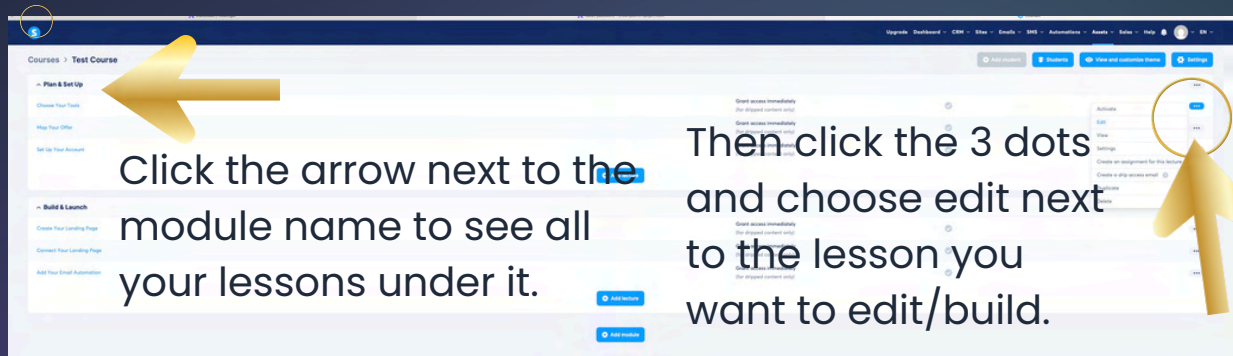
Keep Comments OFF if:

- It’s a freebie, tutorial, or quick-start guide.
- You want a clean, distraction-free viewing experience.
- You’re not planning to moderate or reply often.

Create Your First Course

Continue adding the Modules and Lessons (lectures) you want for your product/course outline.

- 5** Once you have entered the names for all your modules and lessons you can edit each one. This is when you add all your content for each lesson (lecture).



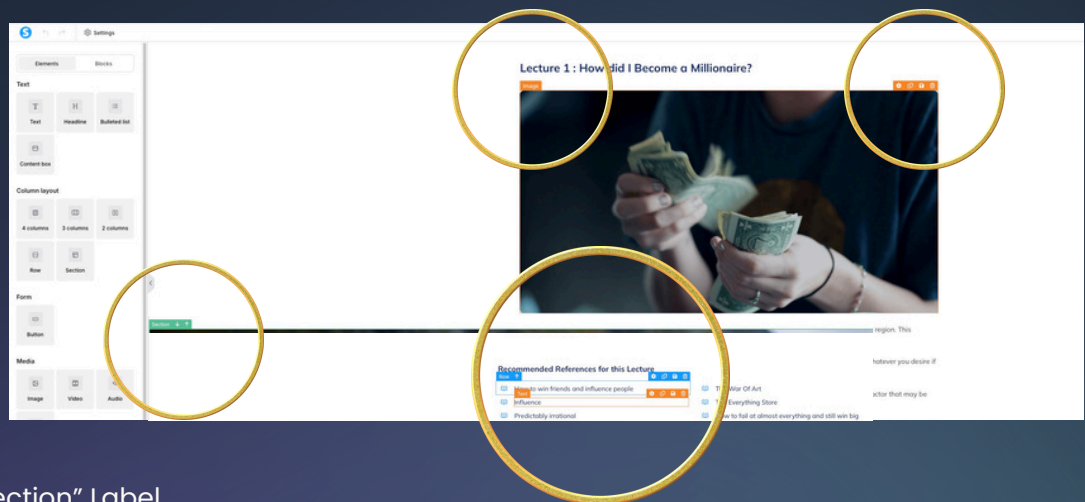
Pro Tips for Beginners:

- ✓ Keep lessons short (1–2 scrolls max) → quick wins build momentum.
- ✓ End each module with a micro-CTA:
"Next: Let's build your live landing page."
- ✓ Use consistent button colors (one of your brand colors) for "Next Lesson."
- ✓ Proof-read each page before publishing.

Create Your First Course

You are now inside the lesson and can build your product/course.

6



TIP: The Green "Section" Label

At the top-left of a block (like your "Section" tag in green):

- This indicates you're editing a Section, not just a text or column element.
- A "Section" contains rows and columns inside it.
- Editing a section's background color or spacing affects everything inside.

Example: If you want to make a blue background behind your entire pricing table, select the green Section label → change background → apply gradient.

How to Access Each

- Hover your mouse over any area until the blue outline appears.
- The small toolbar with icons shows up at the top.
- Each icon controls that specific "level" —
 - Blue outline = element (like text or button)
 - Green outline = section (whole area with multiple elements)

Editing Icons in Systeme.io:

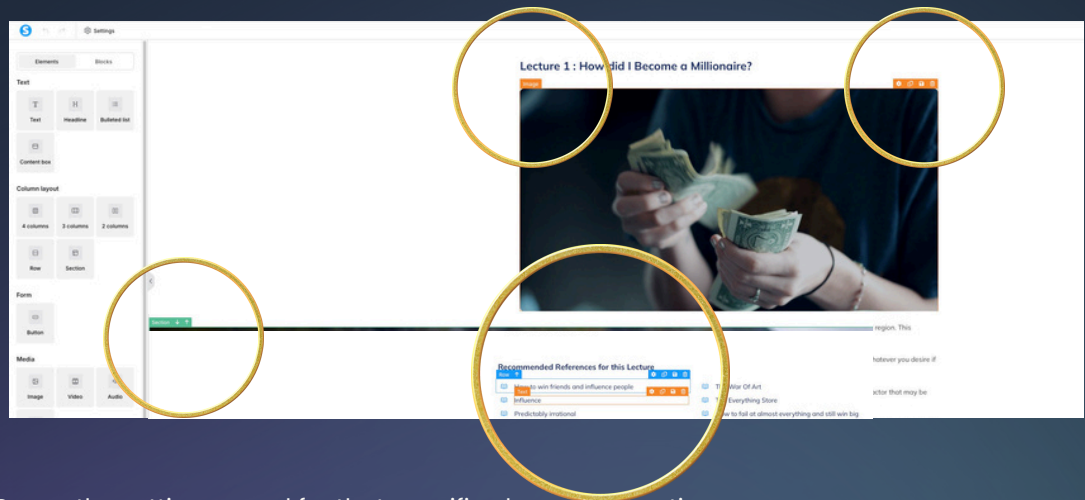
Each box or section you hover over has its own toolbar.

- Settings → Edit style and content
- Lock → Prevent accidental edits
- Duplicate → Copy instantly
- Delete → Remove safely
- Move → Drag up/down
- Collapse → Hide block while editing others

Tip: Always edit from top-down and save often – Systeme.io doesn't auto-save changes in the editor. After saving always then select "exit" . 20 / 78

Create Your First Course

You can use the template and/or delete any element and customize.



Gear (Settings) Opens the settings panel for that specific element or section. Lets you edit details like font, colors, margins, padding, animation, and links. Use this to change text color, spacing, or background for just this block - not the whole page.

Lock / Unlock

Locks the element to prevent accidental edits or moves. When locked, you can't change or drag it until you unlock. Lock headers or footers once styled, so you don't accidentally move them.

Duplicate (Two Overlapping Squares)

Duplicates the element instantly. Creates an identical copy right below the current block. Great for repeating lesson sections or creating consistent layouts.

Trash Can (Delete)

Deletes the element. Removes the section, text block, or image. Use with caution - there's no undo button, so double-check before deleting.

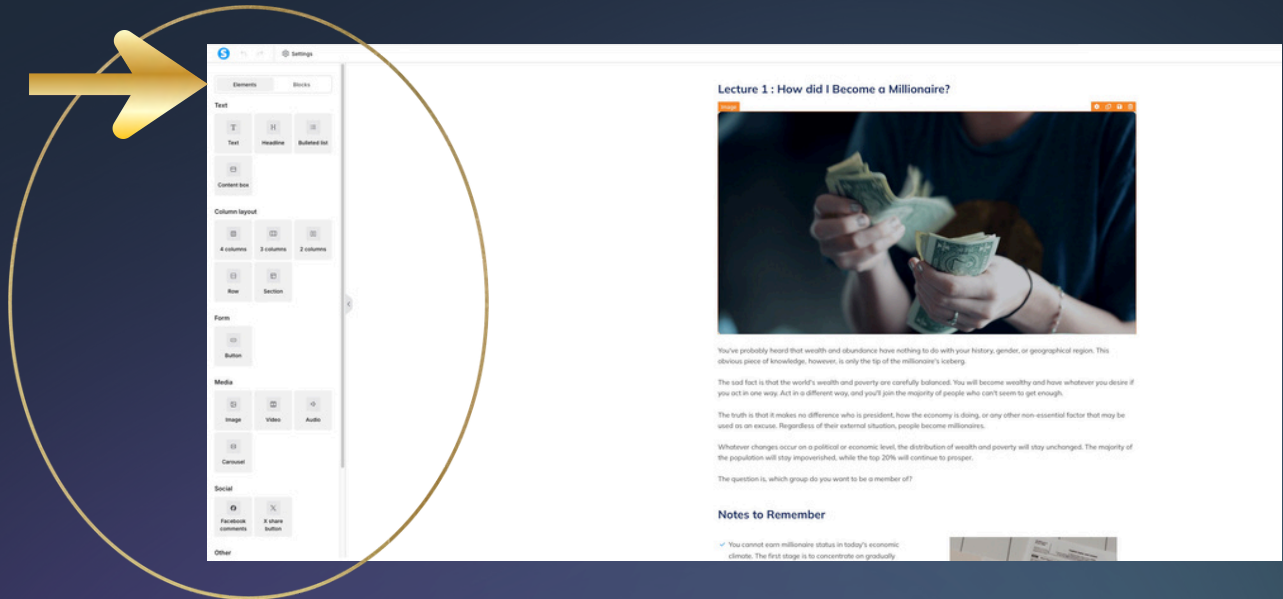
Move / Drag Handle (Up-Down Arrows)

Click and drag to move the entire section or element up or down the page. Lets you reorder elements visually. Hold and drag slowly - Systeme.io sometimes jumps sections if dragged too fast.

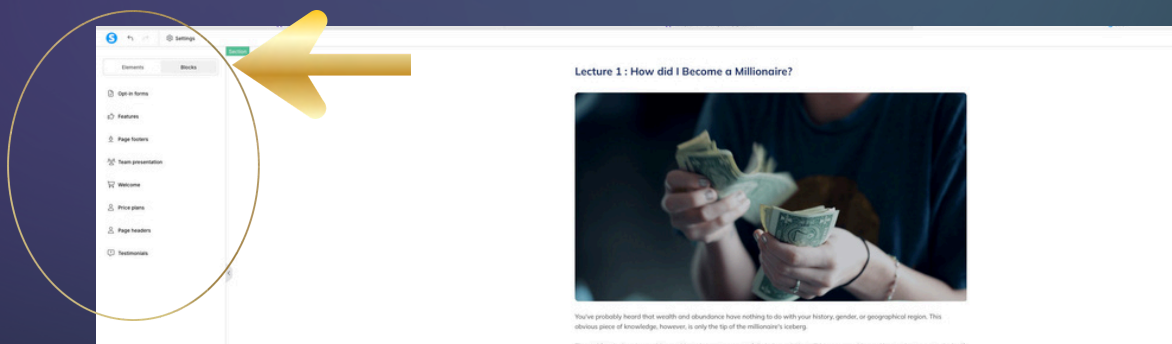
Collapse / Expand Arrow (on far right)

Collapses or expands that block in the editor view. Helps you hide complex sections to make editing easier. Collapse completed sections to keep your workspace tidy.

Create Your First Course



The left column is where all your tools are. There are two options, “Elements” or “Blocks”. The Elements are specific individual tools. Drag any into your course to build your components.



Each “Block” is a pre-designed section. Each one adds a visual or functional section to your lesson – just drag, drop, and customize.

Create Your First Course

Here's what each "Block" means and when to use it.

✓ Opt-in Forms

Purpose: Add an email form directly inside a lesson (for collecting sign-ups or offering downloads).

Use it when:

You want to let students opt into a separate list or bonus (like "Join my next course waitlist" or "Get the PDF version of this guide").

Example: Add at the end of a lesson - "Want my checklist? Enter your email below."

✓ Page Footers

Purpose: Add a clean footer section (usually used at the bottom of each lesson page).

Use it when:

You want to include branding or navigation (like your Escape Innovations footer).

Example:

escape innovations · Escape the Grind. Work Smarter. · © 2025

✓ Features

Purpose: Add a visual list of your product's benefits or steps with icons.

Use it when:

You want to highlight what they'll gain, what's inside a module, or summarize key takeaways.

Example:

What You'll Learn Today:

- Build your first funnel
- Automate your emails
- Design a pro landing page

✓ Team Presentation

Purpose: Add a "Meet the Instructor" or "About Me" section with photo and bio.

Use it when:

You want to personalize your course by showing who's teaching it.

Example:

"Introduce yourself and your course briefly here."

Create Your First Course

Here's what the next four "Blocks" mean and when to use them.

✓ Welcome

Purpose: A pre-formatted hero-style header (often with large text + button).

Use it when:

You want a warm intro at the top of your first lesson or course home page.

Example:

Welcome to Systeme.io Setup

Simplified

Let's launch your first business system step-by-step.

✓ Page Headers

Purpose: Add a stylish header banner to a page or lesson (often with title + background image).

Use it when:

You want consistency across lessons or to visually divide sections.

Example:

Module 1: Plan & Set Up

Simple steps to organize your tools and prepare your first system.

✓ Price Plans

Purpose: Add pricing tables or side-by-side plan comparisons (like free vs. paid versions).

Use it when:

You're showing the difference between pricing.

✓ Testimonials

Purpose: Display quotes or feedback from previous users, students, or success stories.

Use it when:

You want to add credibility or show social proof — especially in a paid course or upsell.

Example:

"This setup guide saved me weeks of tech headaches. I finally launched my first funnel!"

— Alex, Freelancer

Create Your First Course

How Blocks Work in Systeme.io

Every “Block” (like Welcome, Features, Testimonials, etc.) is a prebuilt section that you can:

- ✓ Customize (edit text, color, fonts, layout)
- ✓ Duplicate
- ✓ Save as a reusable template for future pages

Step-by-Step: How to Customize a Block

1. Add a Block onto Your Page

- Click on any block in the left sidebar (e.g., Welcome).
- Hover and click a template to add.
- It will appear where your mouse was positioned on the lesson editor.

2. Select Any Element

- Hover over text, image, or button → a colored outline appears.
- Click to open the side editor panel.

Create Your First Course

Step-by-Step: How to Customize a Block (continued)

3. Edit Content

- Text: double-click to type or use right panel for font size, weight, and color.
- Images: click → choose Replace Image to upload from your files or select from stock.
- Buttons: click → in right panel, change link destination (to another page, funnel step, or external link).

Example: Change the “Learn More” button → “Get My Free Toolkit” and link it to your funnel’s opt-in page.

4. Adjust Section Style

- Click on the outer edge of the block (blue box around whole section).
- On the right panel, adjust:
 - Background color (use your brand colors)
 - Padding & margins (for spacing)
 - Alignment (centered vs. left/right)
 - Font color (use your brand colors)

5. Add or Remove Elements

- Inside the right sidebar → click Add Element (e.g., text, image, divider, video, list).
- Drag where you want it.
- To remove, hover and click the trash can icon.

Tip: Keep lessons clean – 1 image, 1 text block, 1 CTA, and a footer.

Create Your First Course

Step-by-Step: How to Save a Block for Reuse

Once you've customized a section (like your footer, CTA, or lesson header), you can save it to reuse across multiple lessons or pages.

1. Hover over the block you want to save.
2. Click the disk icon in the outline's top-right corner.
3. Give your block a clear name (e.g., Footer 2025 or Lesson CTA).
4. Give your block a clear name (e.g., Footer 2025 or Lesson CTA).
5. Click Save.

That block now appears under the left menu → Blocks → My Blocks. You can drag it into any future page or lesson instantly.

How to reuse later

When editing another lesson page:

1. Open Blocks → My Blocks (top of list).
2. Drag your saved section into the new page.
3. It'll appear exactly as saved — fonts, colors, and layout included.
4. You can still edit the content (it won't affect the original saved version).

Master Blocks - Save your header and footer once → then reuse them on every lesson page for perfect brand consistency. Master Blocks update automatically across all pages when edited, while My Blocks (standard saved blocks) are independent copies. Use Master Blocks for headers/footers to ensure consistency, and My Blocks for reusable layouts that you plan to customize differently on each page.

You now have your first digital product shell ready.

Build Your Landing Page

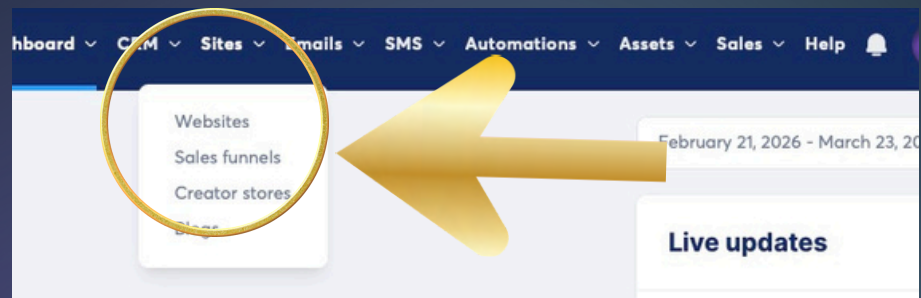
(Fast, Clean, Focused)

Your landing page is the front door of your online business – the place people visit to learn what you offer and sign up.

In Systeme.io, landing pages are created inside funnels, and even on the free plan, you can build a beautiful one in minutes.

1

Click Sites
then Sales
Funnel



Under “Sites” in Systeme.io, you’ll see:

- Website → for building a website with multiple page
- Sales Funnels → the main tool you’ll actually use
- Creator Store → for selling multiple products (eCommerce style)
- Blog → for long-form content marketing (optional, later stage)

Our Suggestion to Build Your Website

Inside Systeme.io, you’ll find your website builder under Sites → Sales Funnels. Don’t let the name confuse you – a funnel is simply a website with multiple connected pages.

You’ll build your landing page (which acts as your homepage) inside a funnel in this course.

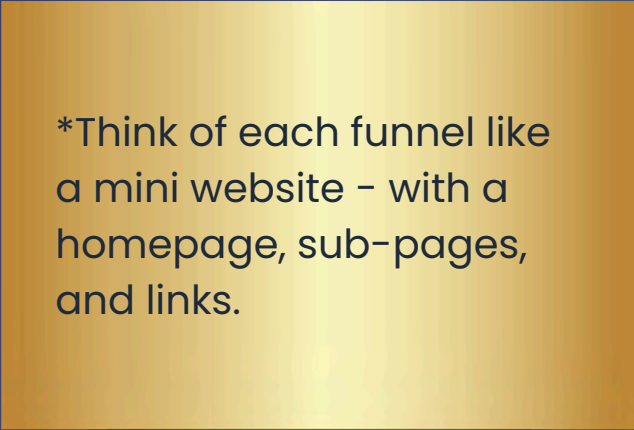
Later, you can add extra pages like About or Contact – all under the same funnel. A sales funnel is a structured, step-by-step path designed to convert visitors into buyers for a specific offer. A website is a broader, multi-page platform meant for general information, browsing, and building brand awareness.

Build Your Landing Page

Funnels OR Website Builder

Systeme.io now separates “websites” and “funnels” like other platforms. They will continue to make updates. For starting we suggest using Funnel to build if you are planning on having a course or funnel.

A funnel is simply a group of pages — just like a website — but with a clear flow (like Landing Page (or homepage) → Opt-in → Thank-you). Systeme.io uses funnels as your all-in-one website builder.



*Think of each funnel like a mini website - with a homepage, sub-pages, and links.

Example:

- Page 1 → Landing Page (Home) → where people learn what you offer and opt in
- Page 2 → Thank You Page → confirms sign-up
- Page 3 → About Page (optional) → simple info about your brand
- Page 3 → Contact Page (optional) → small form or email address

Build Your Landing Page

When you create a new funnel (under “Sales Funnels”), Systeme.io automatically gives you:

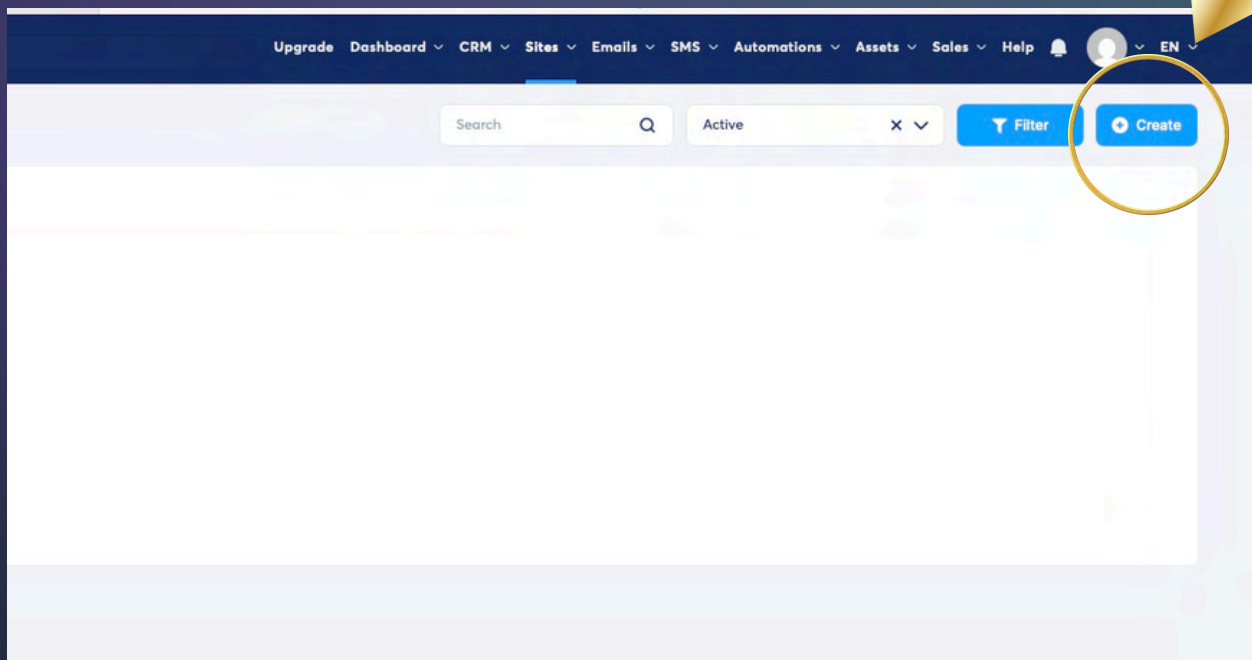
- An Opt-in page (your homepage/landing page)
- A Thank you page (your confirmation or next step)

You can rename and repurpose these.

You can also click “Add Step” to create extra pages:

- Sales Page
- Order Form
- Upsell
- Downsell
- Thank you page

From your dashboard, go to Sites → Sales Funnel → Then Create.



Build Your Landing Page

Understanding Funnel Goal Options





When you click “Create a Funnel,” Systeme.io will ask you to choose a goal. This simply helps it pre-load the right type of pages for you – but you can always edit or add pages later.

Create funnel ×

Name*

Funnel domain ?* × ∨

Choose your funnel goal*

- **Build an audience**
Collect email addresses and build your email list
- **Sell**
Sell a product or a service
- **Custom**
Build a custom funnel from scratch
- **Run an evergreen webinar**
Run evergreen webinars to automate your business

Currency × ∨

Build Your Landing Page

Here's what each option means:

Build an Audience

- **Best for: Collecting leads or offering a freebie**
- **Includes: Opt-in Page + Thank-You Page**
- **Use this if: You want to grow your email list or share a free guide**

Sell a Product / Service

- **Best for: Selling a course, template, or digital product**
- **Includes: Sales Page + Checkout Page + Thank-You Page**
- **Use this if: You already have a paid offer ready to sell**

Run an Evergreen Webinar

- **Best for: Hosting an automated video training or webinar funnel**
- **Includes: Registration Page + Replay Page + Thank-You Page**
- **Use this if: You plan to use a webinar to teach or sell (advanced)**

Custom

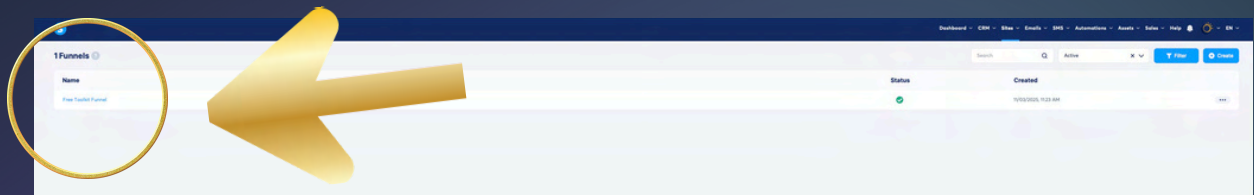
- **Best for: Building your own website layout from scratch**
- **Includes: Blank Funnel (add pages manually)**
- **Use this if: You want full design freedom for pages**

Build Your Landing Page

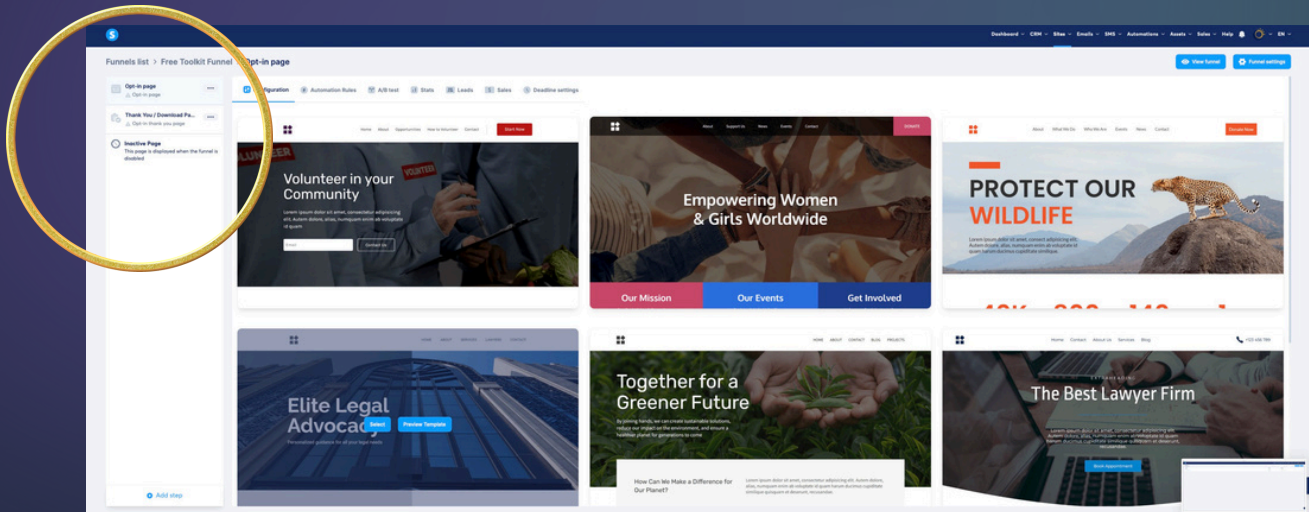
2

For our steps we will use “Build an Audience.”

Name your funnel something clear – for example: “Free Toolkit Funnel” or “Setup Landing Page.”
Click “Save”. Then Click the name of your funnel.



You'll now see your funnel steps listed on the left: Opt-in (aka Squeeze page) and Thank You Page.



Build Your Landing Page

3

Click on the left sidebar where it says Opt-in Page
That opens the template gallery you're seeing now.

Browse the templates

Look for one that's:

- Clean and professional (not a nonprofit or corporate theme)
- Has a single focus section — headline, short text, and form

Systeme.io redesigned their templates to look more like full websites as of 2025 (since funnels now double as websites). So, even the "Opt-in Page" templates come with a default navigation header (Home, About, Contact, etc.).

But for landing pages that are meant to convert – you don't want those links.

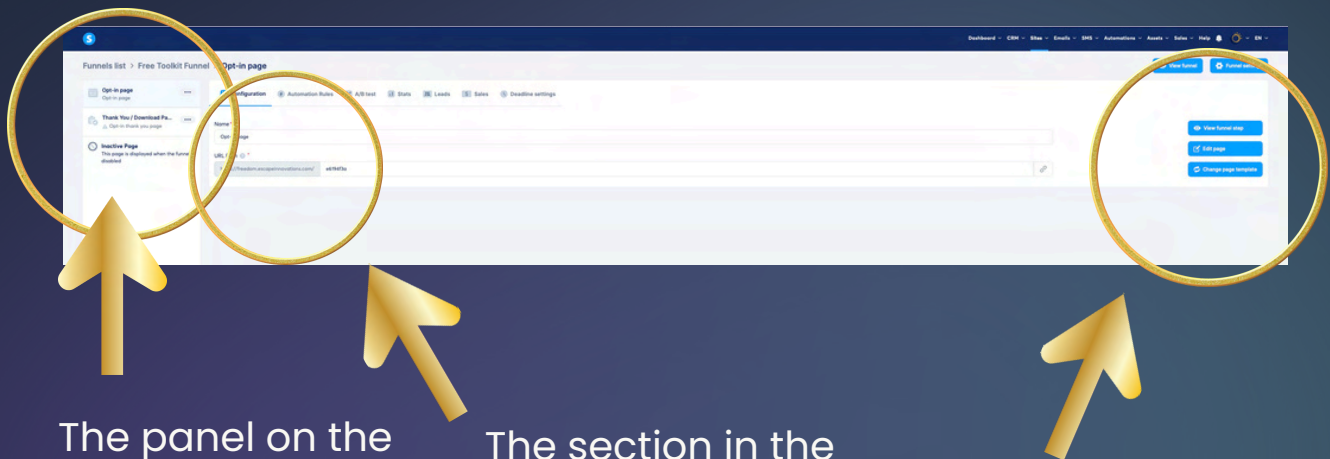
They distract visitors and reduce sign-ups.

Here's the good news: that's totally fine. You can easily remove or hide that navigation bar in about 15 seconds.

Build Your Landing Page

Configure Your Page (Before Editing)

After you've selected your landing page template, you'll be taken to this Configuration screen. This page lets you name your step and customize the link (URL) before opening the editor.



The panel on the left shows your funnel steps (Opt-in Page, Thank-You Page, etc.).

The section in the middle lets you rename the step and edit its URL.

Buttons on the right let you view, edit, or change the template.

Build Your Landing Page

4

Here's What to Do Next:

1. Name Your Page

- Under "Name," type something clear like:
- Landing Page or Free Guide Page
- This is just for your own organization inside Systeme.io.

2. Customize the URL Path

- Under "URL Path," replace the random code with something short and simple – for example: freeguide or getstarted
- Systeme.io saves these changes automatically – there's no Save button.
- This creates your public page link.

Example: <https://yourname.systeme.io/freeguide>

*Tip: Only use lowercase letters, no spaces or symbols.

4. Preview or Edit

- Click View Funnel Step to see how your page looks.
- Click Edit Page to open the drag-and-drop builder to build your page.

Once you click Edit Page, you'll enter the page editor – where you can start customizing your headline, image, and form.

Build Your Landing Page

How to Remove the Navigation Bar (optional)

Inside your page editor:

1. Hover over the top navigation bar until a blue outline appears around the whole header section.
2. Look for a small toolbar above it — click the trash-can icon to delete the section.
3. You'll now see your clean landing page layout without any links. You can drag a "Row" under "Column Layout" above you Headline if you want more space.

Done – your page now looks like a true conversion-focused opt-in.

Optional: If You Want to Keep It

If you prefer a website-style layout (for a personal brand site, not just a funnel):

1. Instead of deleting it, click the gear icon on the section.
2. Remove unnecessary links (e.g., "Donate," "Blog," etc.).
3. Rename remaining ones to fit your project — for example:
 - Home
 - About
 - Contact

Tip: This is perfect if your using Systeme.io as your main website instead of just a lead capture page.

Build Your Landing Page

Customize Your Page (Simple + Clear)

Inside the page editor:

Headline

- Click the main headline and type your offer.

Example: Free Starter Toolkit

- Formatting: Use a large headline (about 36–48px) and body text around 16–18px.

Tip 1: Just like you edited text blocks in your course lessons, double-click to edit and use the left panel for font size and spacing.

Tip 2: Save your brand colors for all text. See below.

The image shows a landing page editor interface with a white background. The main headline reads "Escape the Grind Toolkit" in a large, bold, dark green font. Below it is a sub-headline: "Build your first system in a weekend – simple, clear, and free." At the bottom, there is a "Contact us" button and a "More" link. A color picker tool is open over the "More" link, showing a color gradient and a "Saved colors" section with several colored circles. Annotations with yellow arrows point to various elements: "Highlight text" points to the headline, "Then: Click the color circle to change the color" points to a color circle in the picker, and "Last: Enter/Choose your brand color/Click the preset circles to save the colors" points to the "Saved colors" section. Dashed boxes indicate the bounding boxes for the headline, sub-headline, and "More" link.

Build Your Landing Page

Customize Your Page (Simple + Clear) continued

Image or Background

- Click the hero image → Replace image → upload your own.
- Choose a clear, relevant image for you brand/course.
- Or delete the image and set a solid or gradient background in the section settings.

Tip: As in the lesson editor, click the section (outer box) to change background color/gradient and padding.

Form Fields

- Most templates include a form block. Keep it simple:
 - Collect First Name and Email only.
- Click the form → Settings → Inputs to change labels/placeholders.
 - Your first name
 - Your best email

Tip: Like you did with lesson forms, use the left panel to add/remove inputs.

Build Your Landing Page

Customize Your Page (Simple + Clear) continued

Button

- Click the button → change Button text in left panel.
Example: "Get Instant Access" or Download Now"
 - Action on click: choose what you want the button to do.
- ✓ Next step in funnel
→ Sends visitors to the next page in this funnel
choose, next step URL (example: Thank-You page)
 - ✓ Open URL
→ Sends visitors to another website, sales page, or
checkout link
Example: <https://yourbrand.systeme.io/offer>
 - ✓ Download file
→ Use this if you want them to download a PDF
directly
Upload your file first (under "Assets →Files").

Tip: Use the left panel to also adjust button size, corners, and padding—same as lesson buttons.

Build Your Landing Page

Customize Your Page (Simple + Clear) continued

How to Upload Your PDF (or Any File) to Systeme.io

If your button links to a free download, checklist, or bonus file, you'll need to upload that file to your Assets area first.

This gives you a shareable link you can attach to any button or email.

1. Open the Assets Section

From your Systeme.io dashboard, look at the top menu bar and click: Assets → Files

2. Upload Your File

- Click Upload (top-right corner)
- Choose your file (PDF, image, video, etc.) from your computer
- Wait until it finishes uploading - it will appear in your file list once complete

File Tip: Use short, clear file names (for example, "setup-guide.pdf" instead of "final_version2.pdf").

3. Copy the File Link

- Next to your uploaded file, click the link icon ()
- This copies your file's public URL - the link you'll share

Build Your Landing Page

Customize Your Page (Simple + Clear) continued

4. Add It to Your Button

- Go back to your landing page editor
- Click your button → Action on click → Open URL
- Paste the file link in the URL box
- Optional: toggle “Open in a new tab” so your page stays open when someone clicks

Now, your visitors can instantly access or download your PDF when they click your button.

Pro Tip: You can repeat this process for any type of file - PDFs, images, Canva templates, or bonus resources.

Keep your Assets → Files section organized so you can reuse links later for funnels, emails, and automations.

Build Your Thank You Page

Systeme.io automatically creates a Thank-You / Download page after someone fills out your form. This page confirms their signup and sets up your next action step.

1. Open the Page

From your Sales Funnel dashboard, open your funnel name:

- Click "Thank-You / Download Page" on the left panel
- Click "Edit Page"

This opens the same drag-and-drop builder you used for your landing page.

2. Edit Your Headline

Click the main headline text and change it.

Example: You're in! Check your inbox for your access link.

Use a friendly tone so they feel instantly rewarded for taking action.

3. Add a Short Line Below

This helps if it lands in their spam folder:

"If you don't see it, check your spam or promotions tab and drag it to your primary inbox."

Pro Tip: You can also include your sender info here - "Emails come from info@yourdomain.com - add me to your contacts."

Build Your Thank You Page

Creating a Thank-You / Download page continued.

4. Add a Soft CTA (Optional Upsell)

Below your confirmation message, add a simple text block or button to softly introduce your next offer.

Button settings:

- Text: Get Instant Access
- Action: Open URL
- Link to your paid funnel, checkout page, or course link

Keep it subtle — your main focus is confirmation, not selling hard.

5. Optional Extras

You can add:

- A small image or mockup of your PDF/course
- A “Next steps” section (what to expect next)
- Social icons or a link to your community

6. Preview and Test

- Before publishing: (Once saved, your page is automatically live and shareable no “publish” button needed) Click Save → Exit Page
- Use Preview Funnel to fill out your form and check that it redirects here correctly

Confirm that:

- The thank-you message displays properly
- The button (if included) opens the correct link
- The layout looks clean on mobile

You now have your first Landing Page and Thank You page.

Design & Copy Guidelines

Now that your pages are built, make sure it follows these clean, high-converting design rules:

Keep It Clean

- One offer per page — no extra links or distractions
- Keep your CTA button visible above the fold (visible without scrolling)
- Use white space generously — less clutter = more clarity

Remove the Top Navigation Bar

If your template has a menu or navigation bar:

- Hover over the header section
- Click the trash icon to delete it
- This keeps visitors focused on your offer and button

Copy Formula (Hook → Value → CTA)

Hook: Grab attention

“Free Starter Toolkit”

Value: Explain the benefit

CTA: Tell them exactly what to do

“Get Instant Access”

Design Tips

- Use Clean Bold Fonts for your headline
- Use clean simple font for body text
- CTA Button Color: Use Your Brand Color
- Avoid dark overlays that make text hard to read

Once your page follows these rules and your funnel saves successfully, it's ready to go live — share your link and start collecting leads!

Prepare What Your Funnel Will Send

Before testing or sharing your funnel, Systeme.io needs to know what happens next when someone fills out your form.

That means we must create:

- ✓ **A Tag — to organize who signed up.**
- ✓ **An Email — to deliver your freebie or welcome message.**
- ✓ **Then we'll connect both inside the funnel's Automation Rule.**

IMPORTANT NOTE

Without a professional email:

You can't send emails – even manually – until Systeme.io knows your sender email is real and verified.

That's how it protects your reputation and keeps your emails from going to spam. So if you're using a Gmail or Yahoo address, you can still collect leads right now.

Everything you build – your funnels, leads, and tags – will still be there.

You'll simply "turn on" your email power later.

Prepare What Your Funnel Will Send

Don't Have Your Professional Email Yet?

Not ready for automation or do not have a domain or professional email?

Great news – you can still start using your funnel right now!

What You Can Do (Right Now)

- ✓ Share your funnel link – your landing page is already live and working.
- ✓ Collect leads – every person who fills out your form is saved in your Contacts list.
- ✓ Tag new contacts – Systeme.io will automatically tag each signup (example: “Toolkit Lead” or “Freebie Opt-in”).
- ✓ Deliver your freebie manually – you can upload your PDF or file to Assets, then link it directly on your Thank-You Page button.

Start testing your funnel – use your own email to test the form and see how contacts are stored.

You just won't be able to send emails yet.

When you're ready to verify your domain, all your leads and tags will already be in place – so your automation turns on instantly.

Prepare What Your Funnel Will Send

BEFORE WE MOVE ON

Create (and Verify) Your Professional Sender Email

Before you can send any automated emails, Systeme.io must verify your professional email sender address – the “From” email your contacts will see. You can’t move forward until this step is done. This ensures your messages don’t end up in spam and lets you use automations.

Why This Matters

Free Gmail or Yahoo addresses can’t be verified for automation. You’ll need a professional domain email – like:
info@yourdomain.com

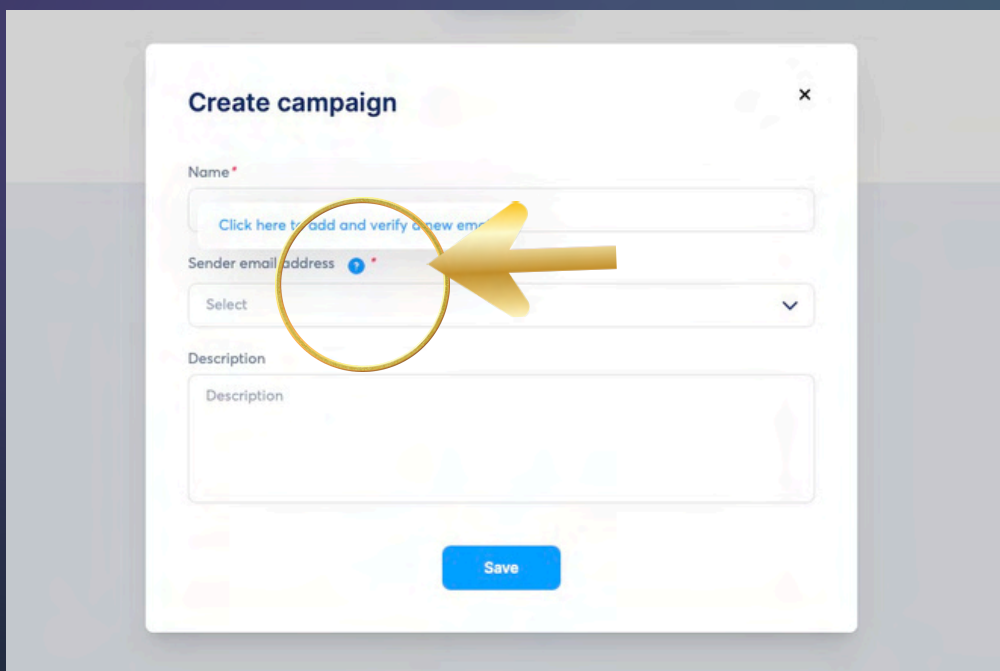
That’s why earlier we recommended setting up your domain and email in Hostinger – it’s affordable, reliable, and integrates perfectly with Systeme.io.

Prepare What Your Funnel Will Send

Have a Domain and Professional Email?

Verify Your Sender Email so you can create your first email. Step-by-Step

1. Go to Emails → Campaigns.
2. Click + Create → Name your campaign something like “Welcome Email” or “Freebie Delivery.”
3. You’ll see a dropdown for Sender Email Address. Click the small blue ? and link that says “Click here to add and verify a new email.”



Prepare What Your Funnel Will Send

You'll now see two sections:

- Domains
- Verified email addresses

First you must verify your domain before you can verify your sender email.

The screenshot shows a web interface with two main sections: 'Domains' and 'Verified email addresses'. The 'Domains' section has a table with columns for 'Domain name', 'Status', and 'DNS Settings'. Below the table is a link that says 'Click here to authenticate your domain and display its information in your email header, which will help improve your email delivery rates'. A large yellow arrow points to this link. The 'Verified email addresses' section has a table with columns for 'Email address' and 'Status'. Below the table is a link that says 'Click here to confirm your email address'. The interface also features a 'Sender' section at the bottom.

Click "Click here to authenticate your domain and display its information in your email header..."

Prepare What Your Funnel Will Send

Prepare your funnel continued.

Your email is tied to your domain. You need to have your domain and email purchased before this step.

SendGrid

I want to use my own SendGrid API key

Domains

Domain name	Status	DNS
Enter your domain name without www example: yourname.com		

Then click save.

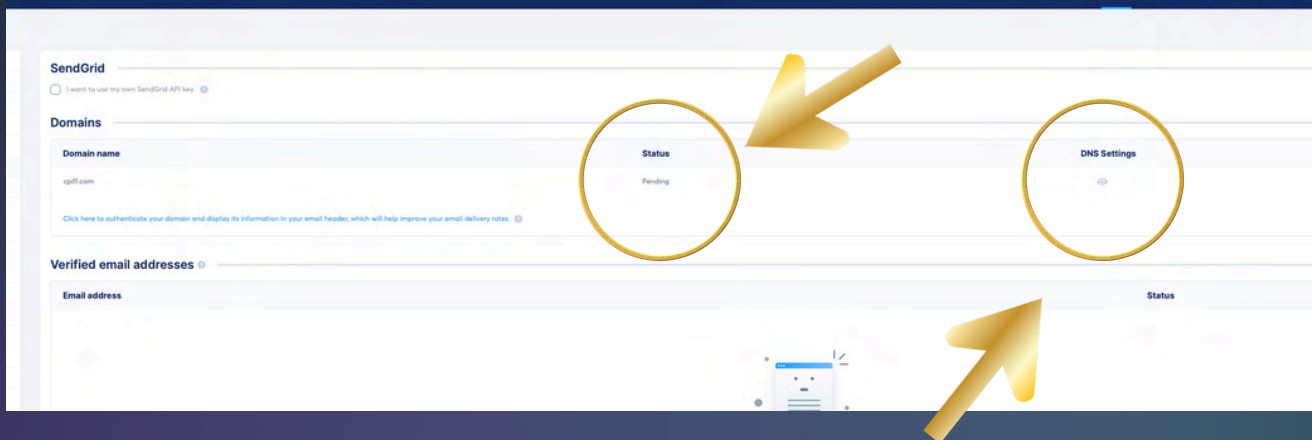
Verified email addresses

Email address

Prepare What Your Funnel Will Send

Prepare your funnel continued.

It will list your domain and now say pending.



Next click the eye icon under DNS settings

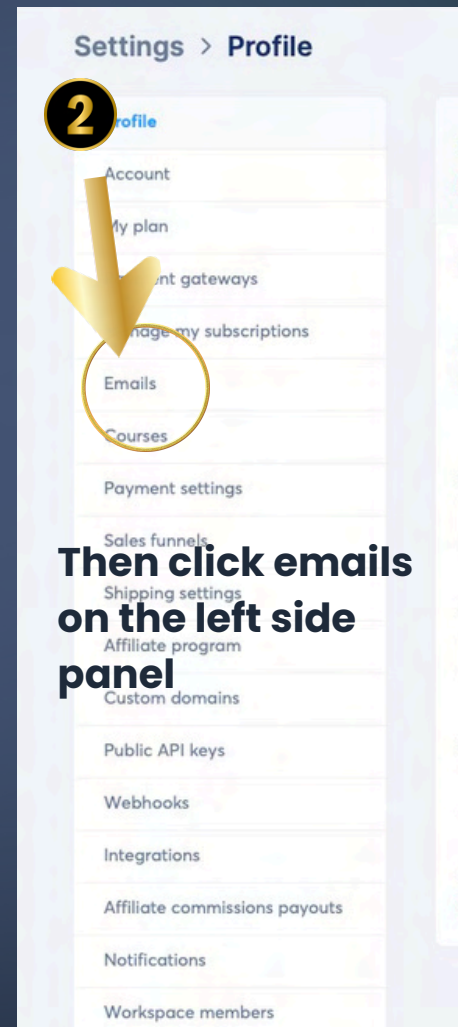
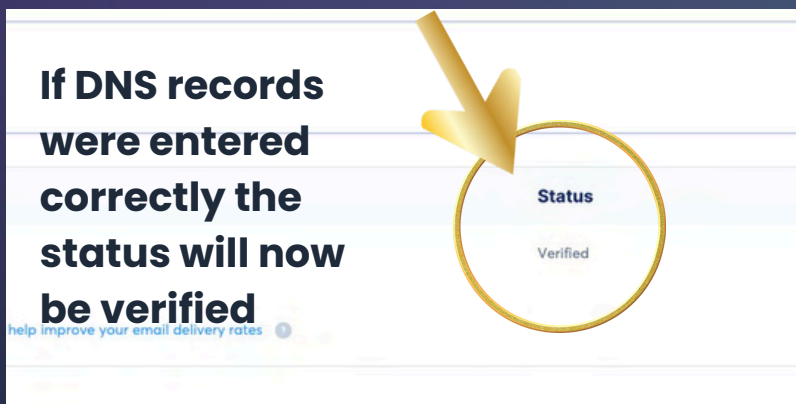
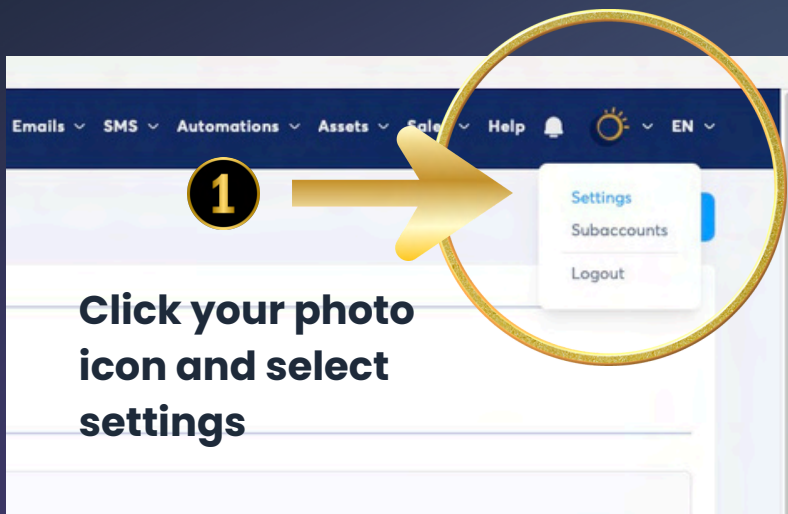
A window will pop up with 4 records. These are DNS records that need to be added where you host your domain and email.

You will need to login to your domain provider to add these DNS records to your domain so Systeme.io can properly work for you. Accessing DNS records can be different depending on your provider. Please reach out to them directly and they can assist you. Copy each DNS record exactly as listed. *If you use [Hostinger](#) you can ask the AI Assistant Kodee to do it for you and paste the records in the chat bot.

Prepare What Your Funnel Will Send

Prepare your funnel continued.

After adding the records → wait 15–30 minutes → Log back into your systeme.io account.

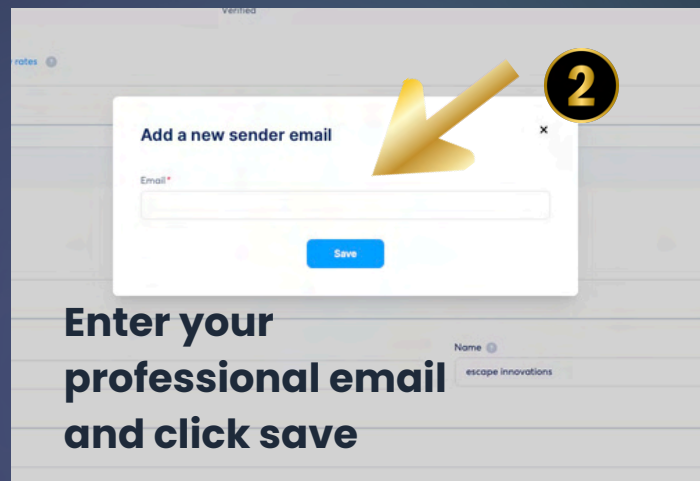
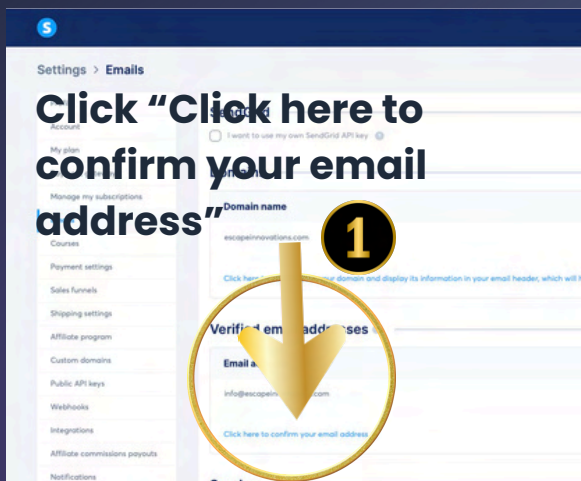


In some cases it can take up to 24hrs for it to be verified depending on your domain provider.

Prepare What Your Funnel Will Send

Prepare your funnel continued.

Once your domain is verified from the same email page as above (Profile icon → Settings → (Left Panel) Email) the DOMAIN section is a “Verified email addresses” section. See below.



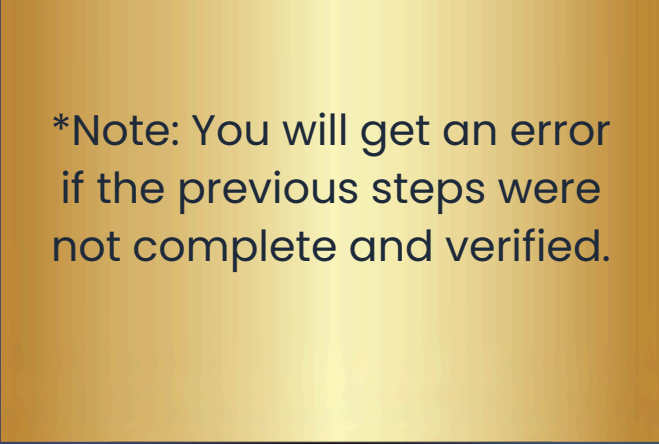
This must be a professional email address for this step (example info@yourdomain.com).

Once entered and saved Systeme.io will send a verification email to that email address. Go to your email and click the verification link.

Prepare What Your Funnel Will Send

Prepare your funnel continued.

Once you have verified that email address go to the next section on the same emails page labeled "Sender". This is where you will now enter that same professional email address. This will be the professional email that will send all your emails within Systeme.io. Click save at the top right of that page.



***Note: You will get an error if the previous steps were not complete and verified.**

Under "Sender" is "Testing" you can use any email here to test your emails, newsletters, etc. before launching your campaigns.

You can now move on to the next step and create your first welcome or delivery email!

Prepare What Your Funnel Will Send

Prepare your funnel continued.

Create a Tag

1. Go to CRM → Tags (top menu).
2. Click + Create.
3. Name your tag something simple, like:
 - Free Toolkit Lead
 - Mini Course Signup
 - Newsletter
4. Click Save.

Tags are optional but very useful – they let you segment and track later.

**Quick Note Before You Continue –
automated emails won't send until
you verify a professional sender
email.**

**You'll need a domain (like
yourbrand.com) from a host such as
Hostinger.**

Prepare What Your Funnel Will Send

Prepare your funnel continued.

Lets create your first email!

The 3 Ways to Send Emails in Systeme.io

1. Campaigns (Automated Emails)

This is what you're currently setting up - and it's the main method for automation.

Use this when you want:

- A series of emails to go out automatically
- To trigger them when someone signs up, buys, or is tagged
- To run "evergreen" sequences like:
 - Freebie delivery → Follow-up → Offer
 - Course onboarding → Lesson reminders

Example:

After someone opts in for your Toolkit → they automatically get "Welcome," "Day 2 Tip," "Day 3 Offer," etc.

2. Newsletters (One-Time Broadcast Emails)

Think of this like sending a mass email to your entire list or a segment - similar to Mailchimp or ConvertKit broadcasts.

You'll find this under:

Emails → Newsletters

Use this when you want to:

- Announce a new video, offer, or post
- Send one-time updates
- Re-engage your whole list

Example:

"New template drop: Build your next offer in one click"

Prepare What Your Funnel Will Send

Prepare your funnel continued.

3. Automation Rules (Trigger-Based Actions)

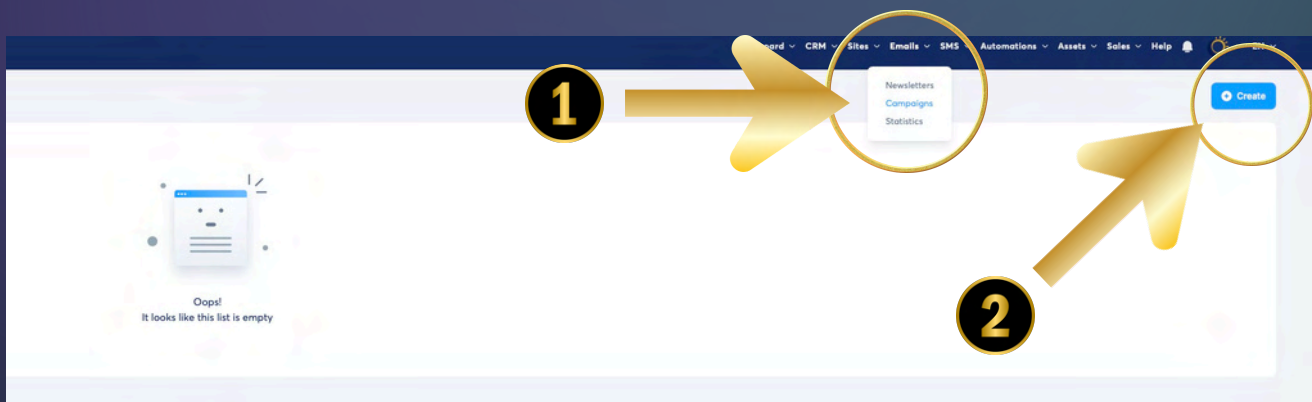
These connect your funnel to your emails - but you still need an existing email or campaign to trigger.

Automation Rules don't create new emails - they tell Systeme.io when to send one.

Example rule:

"When someone subscribes to the Free Toolkit funnel → subscribe them to the 'Welcome Campaign.'"

Create Your First Email Campaign



Go to top menu bar Emails → Campaigns.

Prepare What Your Funnel Will Send

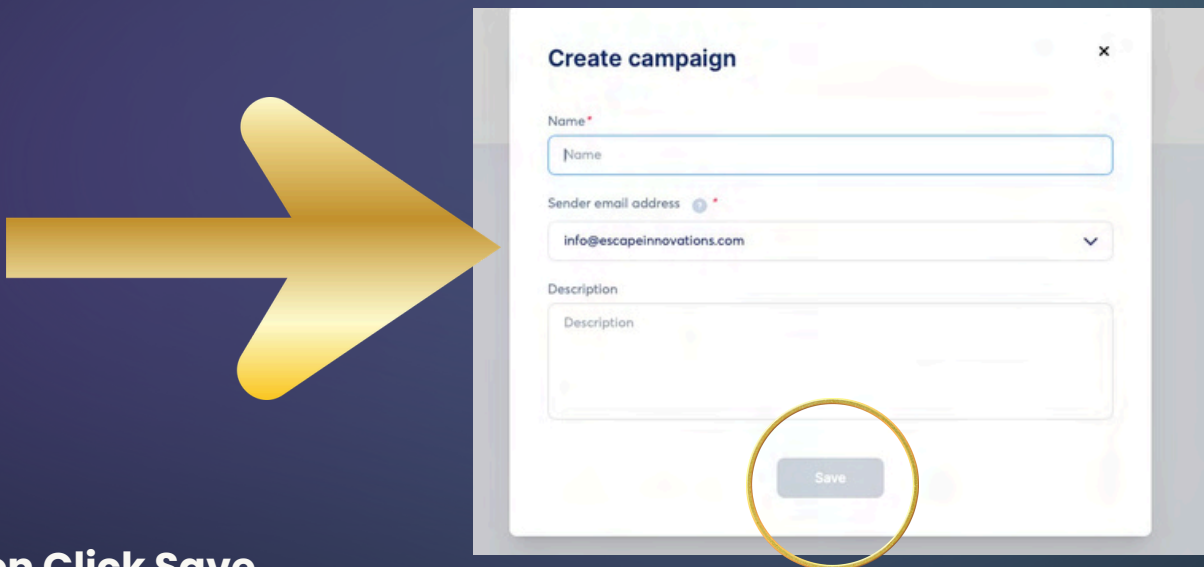
Prepare your funnel continued.

Next you'll see the pop-up window.
Fill in the fields.

Name: Internal campaign label only you will see it.

Sender email address: Choose your verified professional email fro dropdown.

Description: Optional - helps you remember what this campaign was for.



The image shows a 'Create campaign' pop-up window. A large yellow arrow points from the left towards the window. The window contains the following fields:

- Name:** A text input field with the placeholder text 'Name'.
- Sender email address:** A dropdown menu with the selected value 'info@escapeinnovations.com'.
- Description:** A text area with the placeholder text 'Description'.
- Save:** A button at the bottom right, which is circled in yellow.

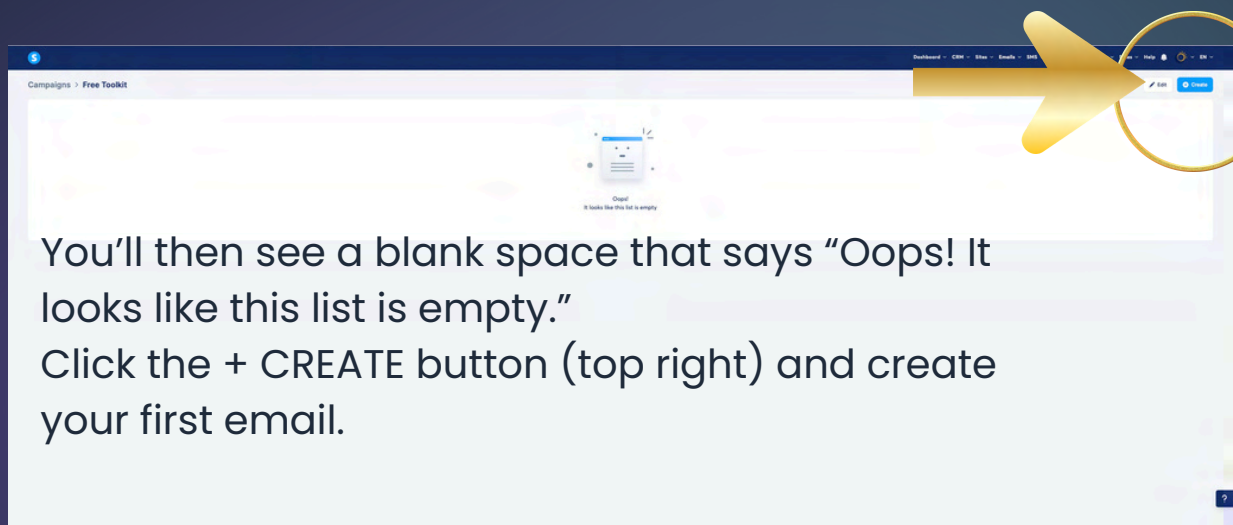
Then Click Save
You'll now see your new campaign listed.

Prepare What Your Funnel Will Send

Prepare your funnel continued.

What Happens Next?

After saving, click into your new campaign by clicking on the name.



You'll then see a blank space that says "Oops! It looks like this list is empty."

Click the + CREATE button (top right) and create your first email.

You will enter:

Subject line: Example - You're in! Here's your next step

Sender name: Your name or company name

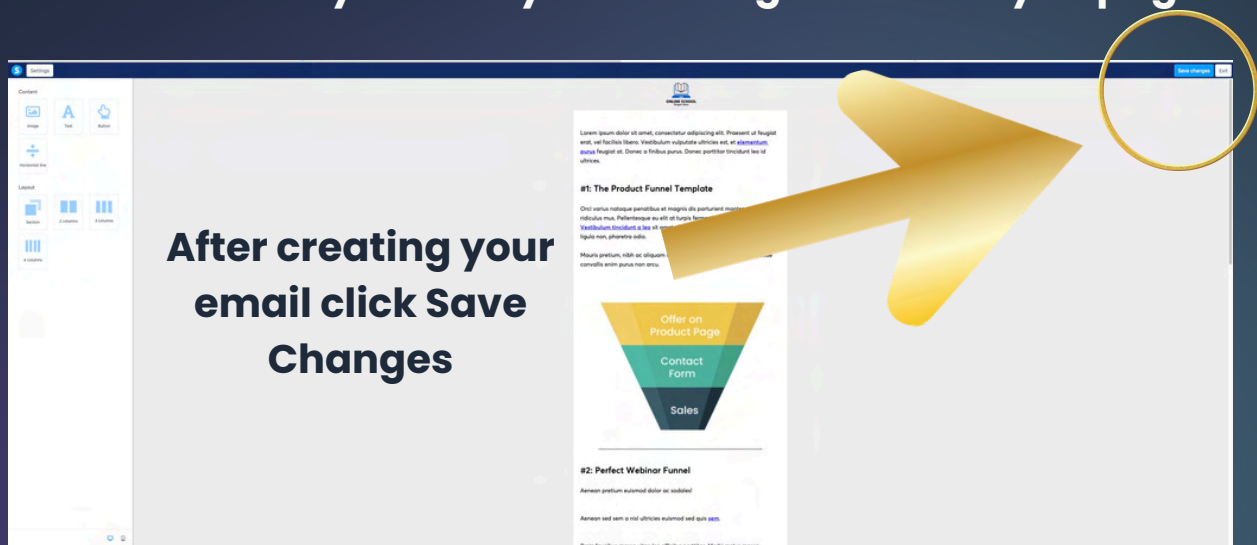
Sender email: Your verified professional domain email

Editor: Choose visual editor if you are a beginner it is much easier.

Prepare What Your Funnel Will Send

Prepare your funnel continued.

You should now be in your visual email editor. It works the same as when you built your landing and thank you page.



You will then be taken to the email editor summary view, and from here you can finalize a few important details before saving your email campaign fully.

Prepare What Your Funnel Will Send

Finalize & Save Your First Campaign Email

In the email editor summary view:

1. Double-check the Email Settings:

- Sender Name
- Sender Email

2. Add your Toolkit link or attachment:

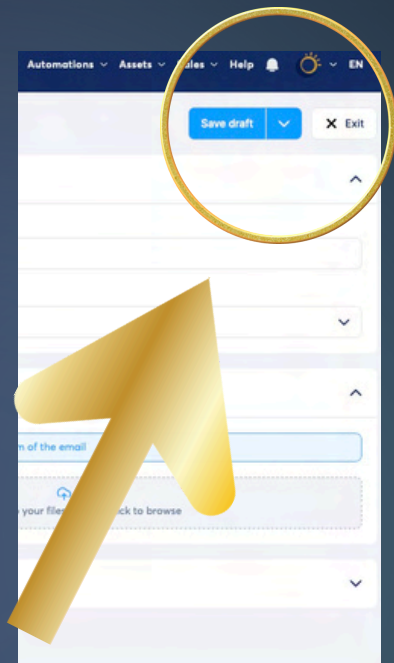
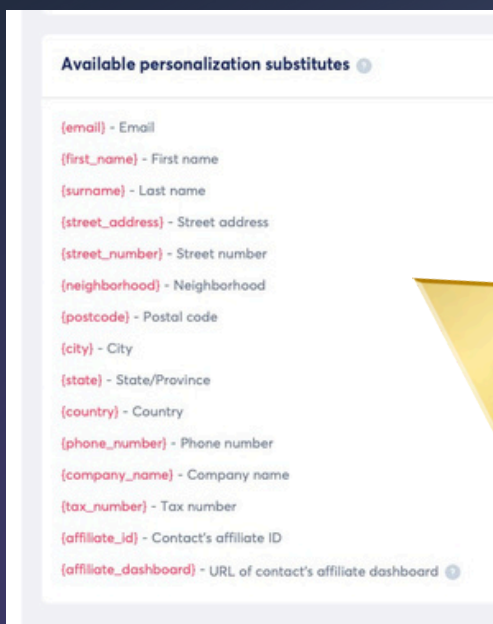
- You have two options:
 - Option A: If your Toolkit is hosted on Systeme.io → paste your download page link inside the email body (recommended).
 - Option B: If it's a PDF you want attached → drag and drop the file under the Attachments section. (It will appear as a clickable link at the bottom of the email.) Attachments are optional — most creators simply link to the PDF instead.”

3. (Optional) Click the “Available personalization substitutes” dropdown to see merge tags like {first_name} – you can use those in your message for personal touches. Just type them in your email and then Systeme.io automatically knows to replace it with each person actual info/name.

Prepare What Your Funnel Will Send

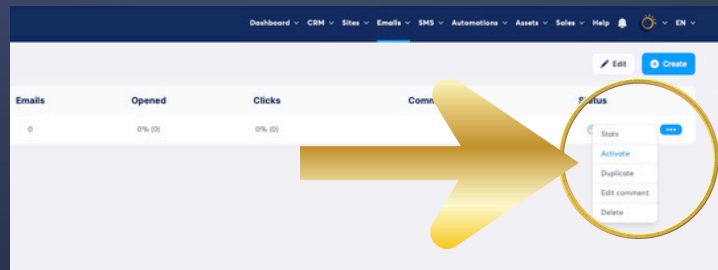
Finalize & Save Your First Campaign Email continued.

Available personalization substitutes list



4. Then Click "Save draft" → then click "Exit" (top right corner). You'll now return to your campaign dashboard, where this email will appear as the first message in your campaign sequence.

5. Click the 3 dots on far right and choose "Activate" to make sure this email is live and ready for automations.



How to Get Your Funnel Link

Once your landing page and thank-you page are finished and checked, you'll want to grab the public link you can share anywhere (like social media, emails, or outside website). Here's how to get there step-by-step:

Reminder: To get there Top nav Bar → Sites → Sales funnels

1. Open Your Funnel

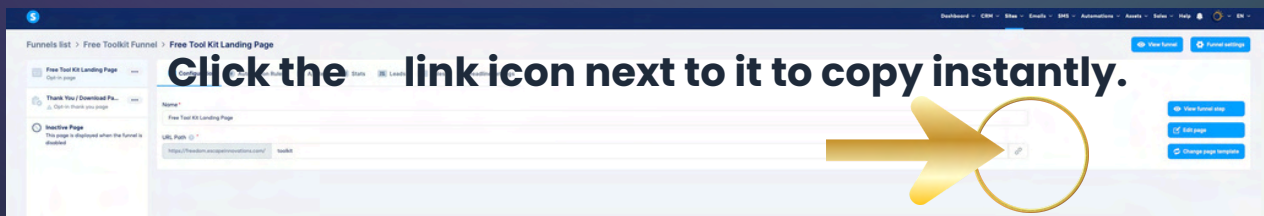
Click on your funnel name (for example: Free Toolkit Funnel). You'll now see all your funnel steps listed on the left — like Opt-in Page and Thank-You Page.

2. Select Your Landing Page (Opt-in Page)

Click the first/top page on the list (this is your main landing page).

3. Find and Copy Your Link

Under the URL Path, you'll see your live link.



How to Get Your Funnel Link

Get Your Funnel Link continued.

Test It

Open a new browser tab and paste the link to make sure it loads your landing page correctly.

Tip: Once your funnel is connected, this one link automatically takes people through your entire sequence (Landing → Thank-You → Optional email automation).

You're done!

That link is now your live page — ready to share anywhere online:

- Social bios
- Email signature
- YouTube descriptions
- Buttons in your Canva PDFs

How to Add Automation to Your Funnel

Your funnel is live - now let's make it automatic.

This method connects your funnel form directly to an action - like sending an email, tagging, or giving access.

Step-by-Step Instructions

1. Go to: Sites → Sales Funnels

From the top navigation, hover over Sites and click Sales Funnels.

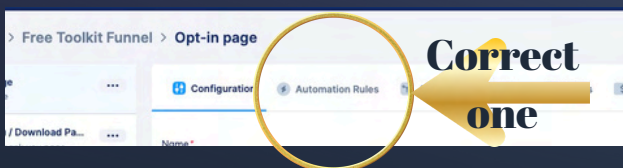
2. Open Your Funnel

Click your funnel name (e.g., Free Toolkit Funnel).

You'll now see your steps on the left — Landing Page and Thank-You Page.

3. Open the Funnel's Automation Rules Tab

- At the top of your funnel view, click Automation Rules (it's next to Configuration, Stats, Leads, etc.).
- (Do not use the global "Automations" tab at the top of the dashboard - it's separate and will affect your whole account).



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How to Add Automation to Your Funnel

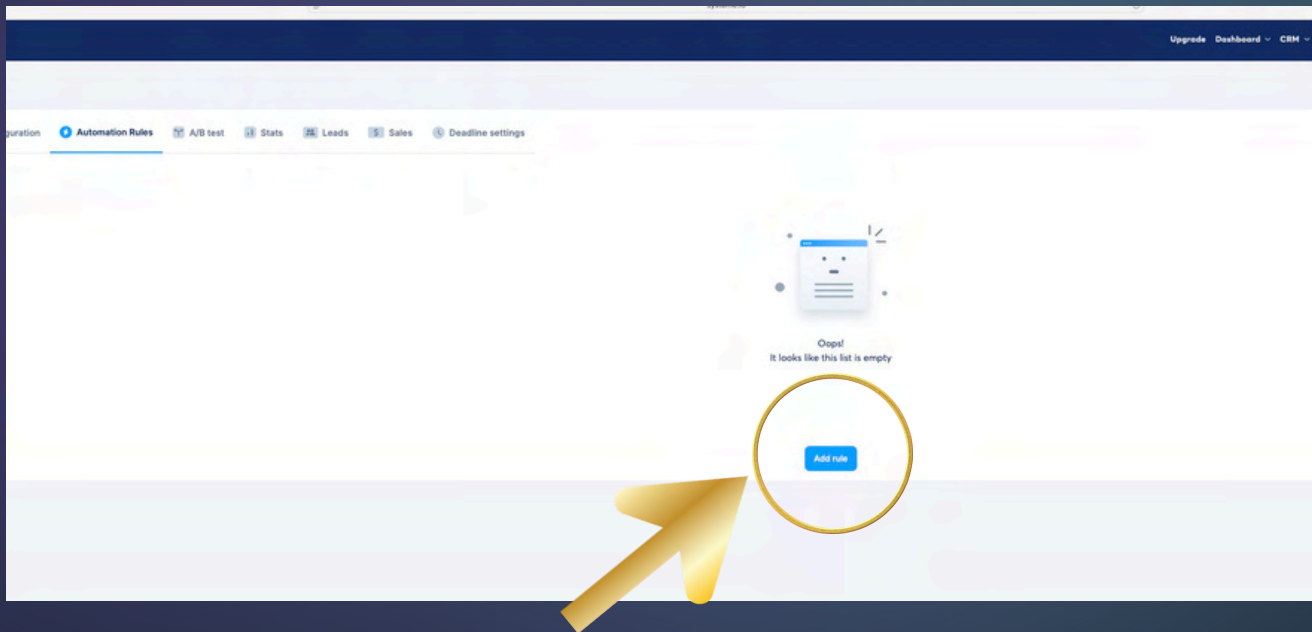
Important: Use the Funnel-Specific Automation Rules
There are two places you can create automations in Systeme.io:

Top Menu → **Automations Global automation area** (affects your whole account).

Inside a Funnel → **Automation Rules Tab** (Funnel-specific automations that trigger from this funnel only.)

This is where beginners should build their first automation rule.

You should now see a blank area that says “Oops! It looks like this list is empty.”



4. Click “+ Add Rule”

Now you’re adding automation specific to this funnel.

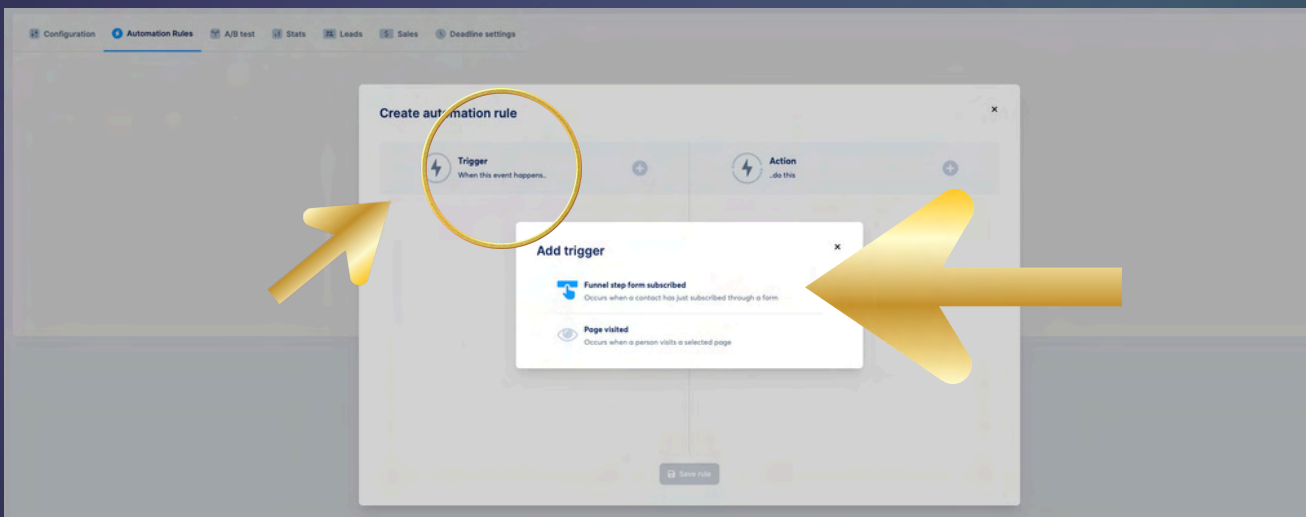
How to Add Automation to Your Funnel

How to Add Automation to Your Funnel continued.

5. Choose Your Trigger

In the pop-up:

- For Trigger Type, choose Funnel step form subscribed.
- Then select your Opt-in Page (Landing Page) from the dropdown. (If this is your only funnel it will already be pre-selected)



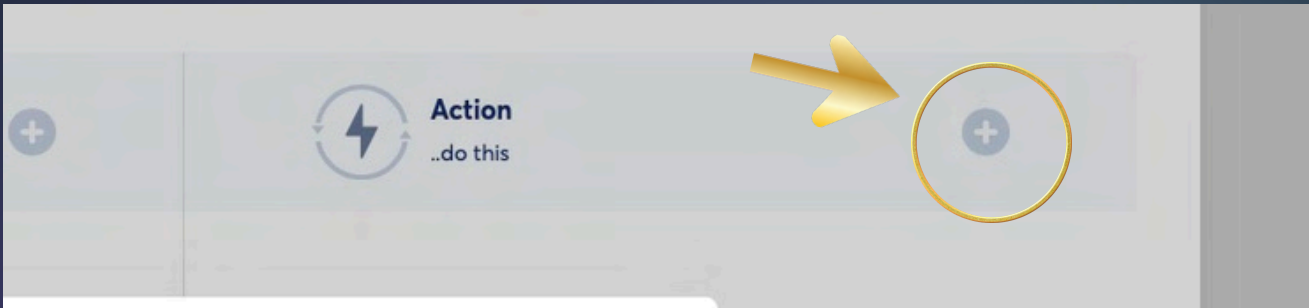
- Then click the + button (pop up will say “Add Trigger”)
- Then click the trigger listed under it to add.

How to Add Automation to Your Funnel

How to Add Automation to Your Funnel continued.

6. Add Your Action

After choosing your trigger, click + next to Add Action



Then choose one from the list:

- Send email → Choose your welcome or freebie delivery message.
- Add tag → Organize your new contacts.
- Subscribe to campaign → Start a follow-up sequence.

Click Save Rule Action when done.

Quick Recap / Checklist before testing your funnel

- ✓ Tag Created
- ✓ Campaign Live
- ✓ Automation Connected
- ✓ Test Email Received

Test & Share Your Funnel

Your system is built. Now we make sure it works end-to-end and then share it with the world.

Run a Full End-to-End Test

A. Open your funnel

- Top menu → Sites → Sales Funnels → click your funnel name.
- Left panel: select Opt-in page → click View funnel step (opens the live page).

B. Submit the form (use a real email)

- Use a new email (or open a private/incognito window).
- Enter First name + Email → click your CTA button.

C. Confirm the redirect

- You should land on your Thank-You / Download page.
- If not, go back to the Opt-in page editor and set the button action to Next step in funnel.

D. Check the contact record

- Top menu CRM → Contacts → search the email you used.
- Confirm you see:
 - Contact exists
 - Tag applied (e.g., Free Toolkit Lead)



E. Check the email delivery

- Open your inbox. You should receive your Welcome/Freebie email. If not, wait a few minutes or check Promotions tab.
- If you used a delay inside your campaign, wait the delay time or temporarily set it to 0 for testing.

Test & Share Your Funnel

(Tip: Always click Save changes/exit screen before switching views to avoid editor lag.)

Mobile Preview

- Got to your funnel → select the Opt-in page → click Edit page.
- Look at the top of your editor toolbar (above your page content).
- You'll see  Mobile phone icon → shows the mobile version.
-  If you don't see it at first, hover near the top-right corner of the editing area – they sometimes “hide” until your mouse is near them. Click the mobile icon.
- The page will instantly adjust to a narrow mobile view.
- You can scroll and check how everything stacks vertically.
- Switch back anytime by clicking the icon again.

Pro Tip for Beginners

Systeme.io doesn't let you edit the mobile layout separately, but you can hide or resize blocks specifically for mobile:

- Click on any section → right-side menu → scroll to Visibility.
- You'll see checkboxes for:
 - Show on desktop
 - Show on mobile
 - You can uncheck one if you want a block to appear only on one view.

Bonus Tip:

Always test the live link on your phone after publishing.

That's the only way to see true responsiveness (fonts, spacing, and images can render slightly differently on real devices).

Test & Share Your Funnel

Publish & Get Your Link

A. Confirm your URL path

- Inside your funnel → Opt-in page → Configuration tab
- URL path should be short and clean (e.g., /toolkit, /start).

B. Copy your live link

- Click View funnel step → copy the URL in the browser.
 - Example: <https://yourname.systeme.io/toolkit>

C. Optional custom domain

- If you've connected a custom domain under Settings → Domains, use the custom domain version of your page (e.g., <https://freedom.yourbrand.com/toolkit>).

Share Your Funnel

Where to place your link (quick wins):

- Instagram / TikTok / YouTube: Link in bio (use the toolkit title in your bio line).
- Facebook & LinkedIn: Pin a post with the link.
- Email signature: "Free Toolkit: Your Freebie Name."
- Buttons on your website: Add to Home + Blog sidebar.
- QR code for events or packaging (generate in Canva → link to your page).

Test & Share Your Funnel

Troubleshooting (Quick Fixes)

A. Didn't receive the email

Go to Settings → Emails and verify your sender email and domain. Re-send your test once you see all green checks.

B. Tag missing on contact

Open your Funnel → Automation Rules and make sure an Add tag action is included. Without it, new contacts won't be tagged properly.

C. Redirect didn't happen

In the page editor, click your button → under Action on click, select Next step in funnel. Click Save and test again.

D. Email stuck in Draft

Go to Emails → Campaigns, click 3 dots far right of email name, and click Activate. Only active emails can be sent automatically.

E. Personalization not working

Double-check your merge fields — try using double brackets, for example: `{{first_name}}`. Re-save and send another test email.

F. Link to PDF not working

Go to Assets → Files → upload your PDF.

Click the link icon next to your file to copy the direct link, then update your button or email link.

Test & Share Your Funnel

Final Checklist

- Opt-in page loads and looks clean on mobile**
- Button sends to the Thank-You page**
- Contact appears in Contacts**
- Tag is applied automatically**
- Email arrives from your verified domain**
- Download link or instructions work**
- You've shared the link in at least 3 places today**

You Did It - Your System Is Live

You just built a real working system - not just a page or a funnel, but the foundation of your business freedom.

That's huge.

Most people never get this far, seriously.

This isn't just setup... it's momentum.

You took the first step toward simplifying your business with tools that actually work - and that's exactly what **Escape Innovations** is all about.

Your Systeme.io setup is now ready to grow with you. From here, you can expand, duplicate, and build your next funnel even faster.

Take a moment to appreciate this:
You didn't just learn how to build a system - **you proved you can.**

What's Next

Build Your Brand Faster

We offer a premium collection of editable templates designed for creators who want to brand, market, and sell their new digital products in style allowing you to launch and scale faster.

- ✓ **Ready-to-use Canva & Systeme.io templates in clean, modern layouts**
- ✓ **Fully customizable - edit colors, backgrounds, and visuals to match your brand**
- ✓ **Instant access - edit, download, and start promoting today**

You've built your system - now make it shine.

As a Systeme.io Setup Simplified student, you can grab any of our templates for an additional 30% OFF current pricing! (code: SAVE30) Visit our shop and start with done-for-you templates and products.

SEE THE DFY TEMPLATES

Stay Connected with



“Freedom doesn’t come from doing more –
it comes from creating systems that do it for you.”

You’ve just taken your first step toward that freedom.

Welcome to Escape Innovations.



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@escapeinnovationsco

Thank You

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