How to sell on Systeme.io, step-by-step

Hey, Eran here. Thanks for checking out this PDF checklist.

This PDF checklist is going to show, with screenshots, step-by-step, how to go about selling on Systeme.io.

You must set up an order form if you want to sell on Systeme.io.

You can also watch me follow this entire process with a video tutorial:

How to sell on Systeme.io checkout page A to Z tutorial
(sell digital products and services)
https://youtu.be/o46M5obgTYc

If you wanted hands-on tech support with implementation, I do offer a tech support membership for Systeme.io customers for $9/month which is only available at this point for people in my Templates & Guides membership.

⇒ Click to check it out
(you will need to be logged in to your members' area to see the offers)

Before we get started, there are some preliminary steps you need to have set up before being able to create an order form.

We will go over these as the first step.

Preliminary housekeeping steps (with a tutorial for each):

- [ ] Connect PayPal: https://www.youtube.com/watch?v=TpIFRU4v8QE
- [ ] Connect Stripe: https://youtu.be/c2rfkCGCNTU?si=kNG5tWf3m6Qlv99s
- [ ] Connect a domain name: https://youtu.be/ord79jE5od8?si=Uz_ZTfNRX2koQWeJ
- [ ] Connect your professional email address: https://youtu.be/_2Zt3hhoLRw?t=245&si=B2KMUbE_cX4biVeS

Once these are done, you can proceed to create an order form - but you may want to consider creating the product you want to sell first.

I explain this in the next section:

Optional: Product Creation Step (with a tutorial for each):

If you sell a digital course, you can either pre-sell it or create it fully.

Either way, I recommend you create the digital product using the "courses" feature so when you get to creating the order form, you have something to give people access to.

If you are selling coaching or some such service, you need to know what you want them to do after they purchase.

Some relevant tutorials:

How does a course look like to the customer in Systeme.io
(9 types of digital products you can sell)
https://youtu.be/STIE0BdJqdM

How to create a digital product in Systeme.io
(private members area set up from A to Z)
https://youtu.be/_AJ-Yc822WQ

Course lesson in Systeme.io, how to create (A to Z tech tutorial)
https://youtu.be/9e3kfKkNGcE

Next, we are going to go through the steps to set up an order form.

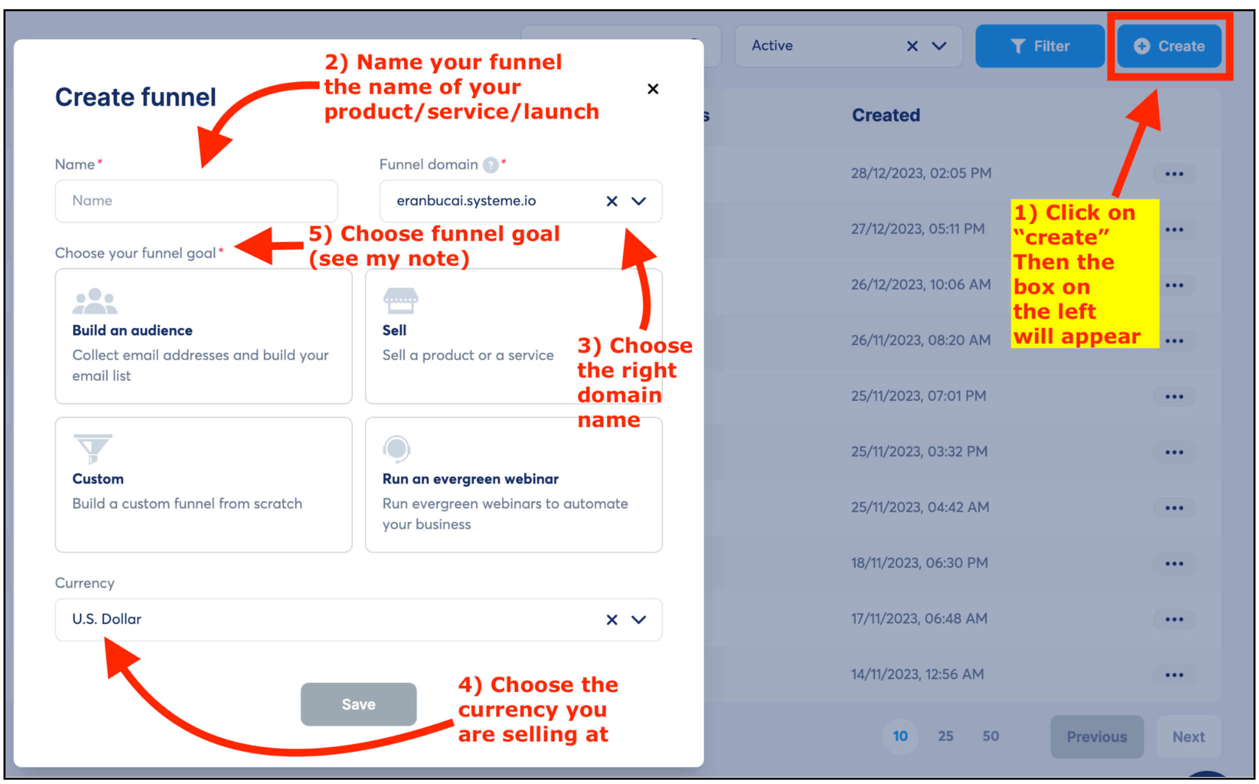
I will give you two ways:

- Option 1: Using the available Systeme.io pre-made templates (in case you don't want to use one of my templates)
- Option 2: Using the high-converting order form template in my paid membership.

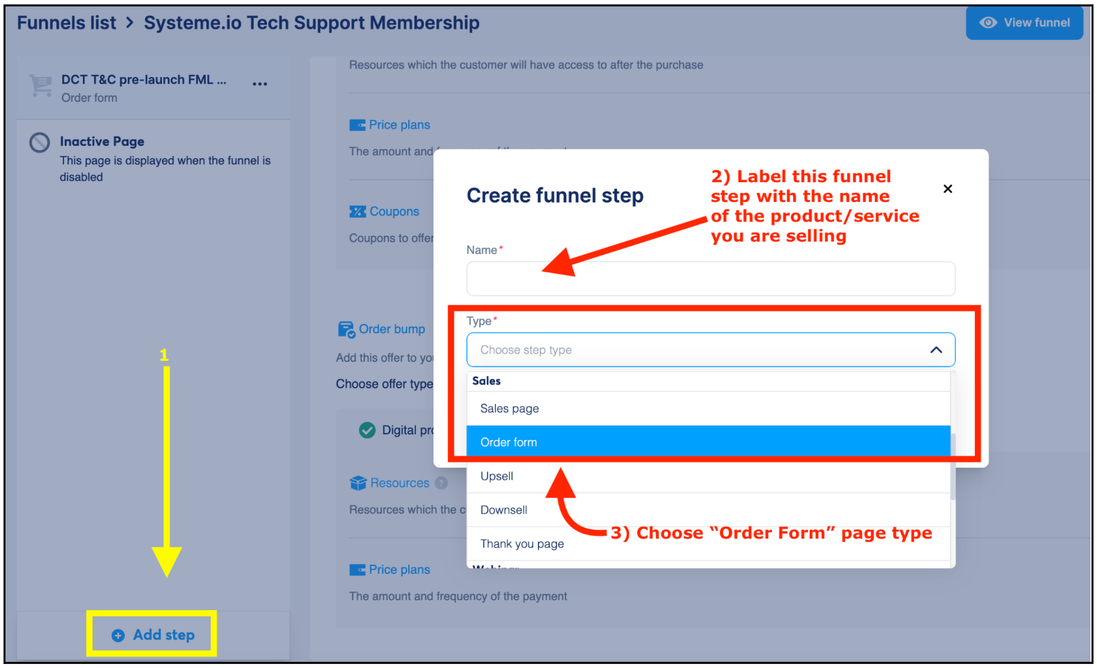
Here are the steps to create an order form:

- [ ] Create the funnel with these 5 steps:

- Click on “Create”.
- Then label your funnel (I usually name it the product/service/launch that I want to sell with this funnel)
- Choose the domain name (use the default one you are given, or my recommendation is to connect your domain name)
- Choose the goal of your funnel (I usually just start with “Custom” which gives me blank space to choose the pages.
- Then choose the currency you are selling in.

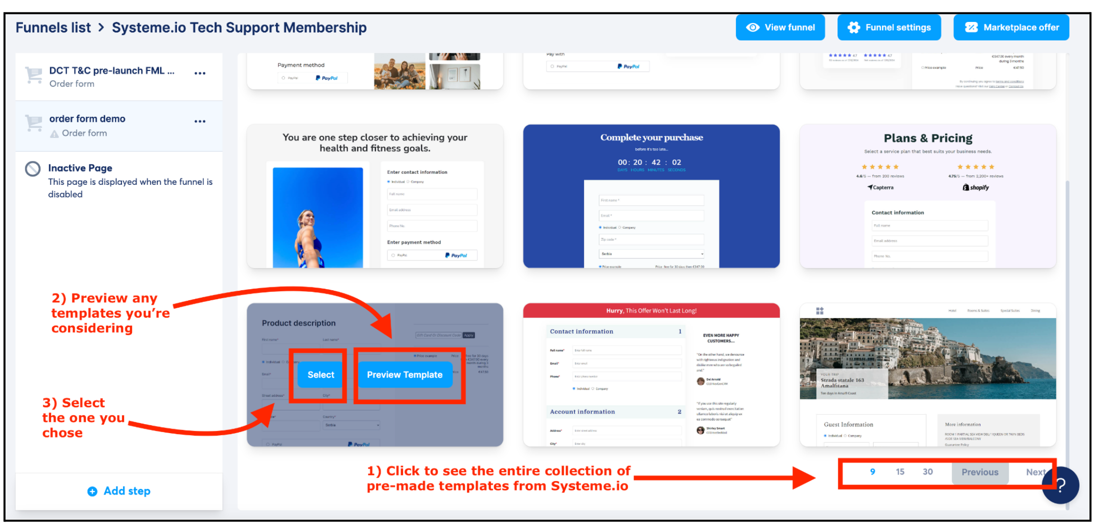


☐ Click “Add step”, choose order form and give your order form a name.



☐ Browse through the pre-made templates from Systeme.io, preview them, and select the one you want.

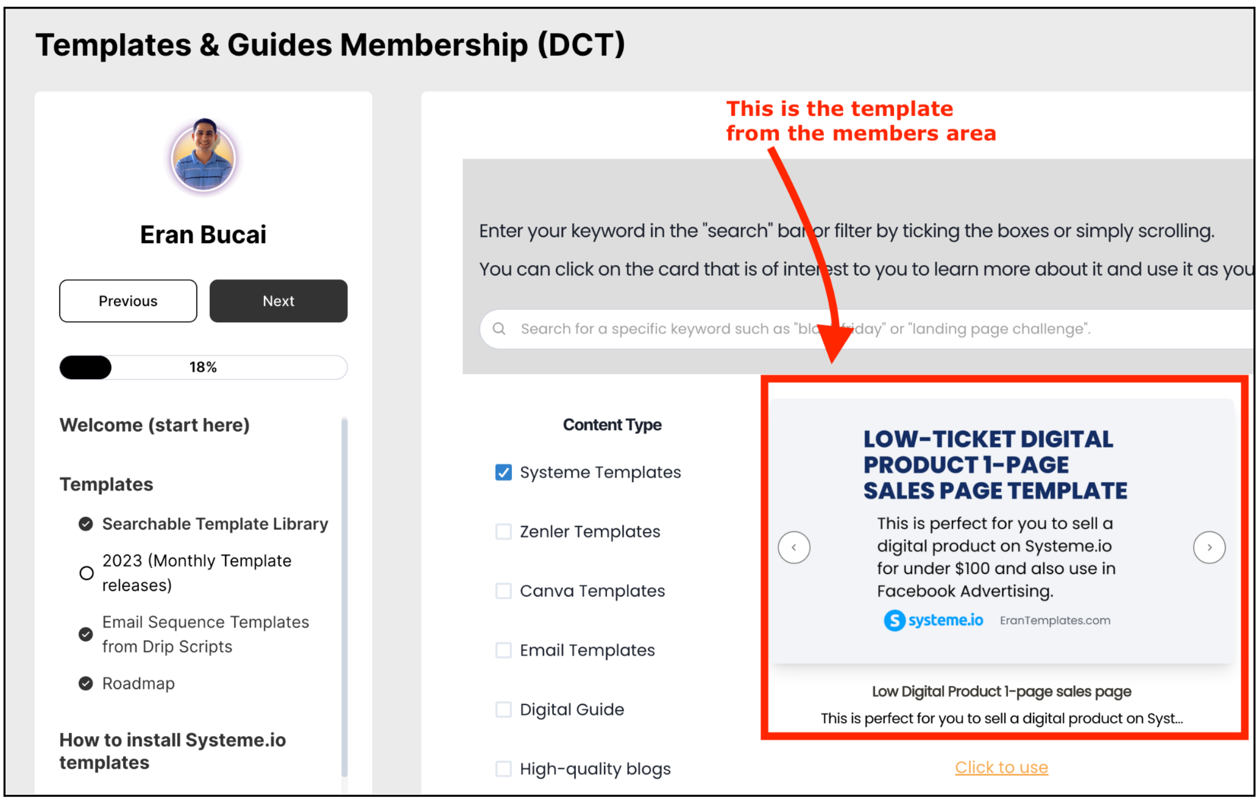
Pro tip: Do not make your choice based on colours! That’s easy to customise. Choose based on the look and structure. That’s where you’ll save a lot of time.



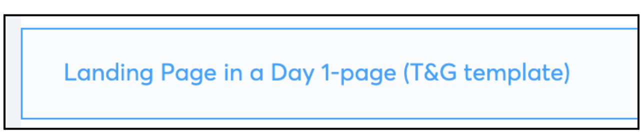
Want to use the template in my paid membership?

If so, here is my recommended step.

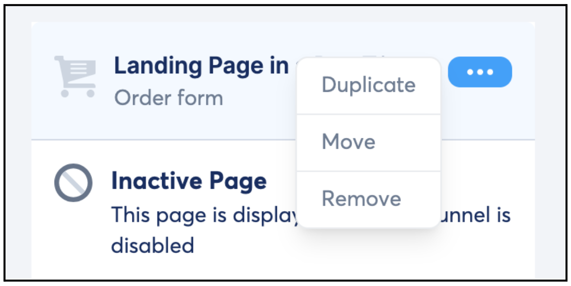
- [ ] Use my proven order form template for the Landing Page in a Day Course which is proven to convert on cold traffic through Facebook Ads (8% conversion rate).



This is what the sharable funnel looks like after you import it into your account.



☐ Click on “Duplicate”, then “Move” to the new funnel you are setting up your order form.



Once the order form page is in the new funnel, we can now set up the automations and pricing.

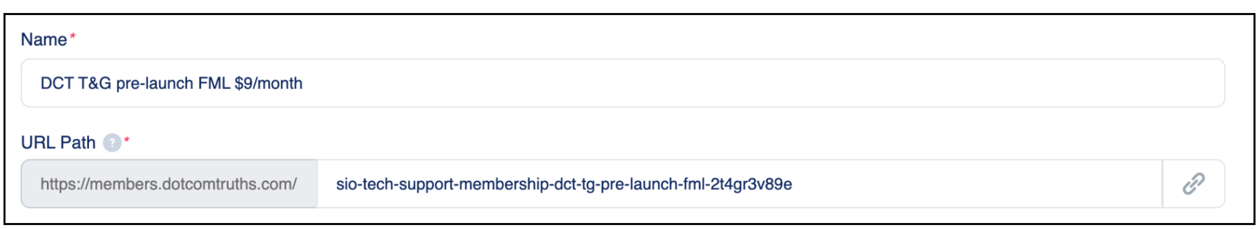
Order Form Automations Set up

Order form name and URL Path

In this step, you label the order form to make it easy for you to differentiate what this offer is, and also choose a URL that identifies this order form whether you want it to be a memorable URL or not.

☐ Give the order form a name and change the URL path as you wish.

The URL path needs to be small letters and/or numbers, and no spaces.



Affiliate Set up

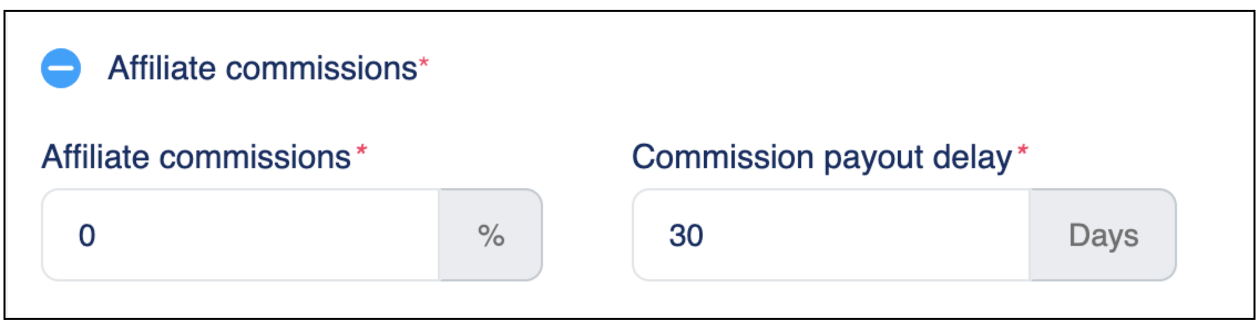
In this step, you choose how much commission you want to give your affiliates to help you make sales.

- [ ] Choose the affiliate commission and the delay on the commission payout

If you want other people to sell your product and earn a commission, choose a number.

The commission delay needs to at least account for the refund policy period.

If you are giving a 14-day money-back guarantee, put at least 14 days on the commission delay.



Once you set up an affiliate commission, anyone who promotes this order form with their affiliate link included will earn this commission depending on what you set up.

(**Note:** I have a separate checklist and tutorials on setting up an affiliate program if you want to grab those)

Order Form Resources

In this step, you are going to give people access to the things they buy from you on this specific order form.

- [ ] Set up the Resource (Courses, Course Bundles, Tags or Communities), i.e. what do you want to give people access to after they make a purchase?

You can give access to more than one thing.

I always choose a relevant “tag” to identify this specific buyer.

My standard tag for this is **[name of product] (buyer)**

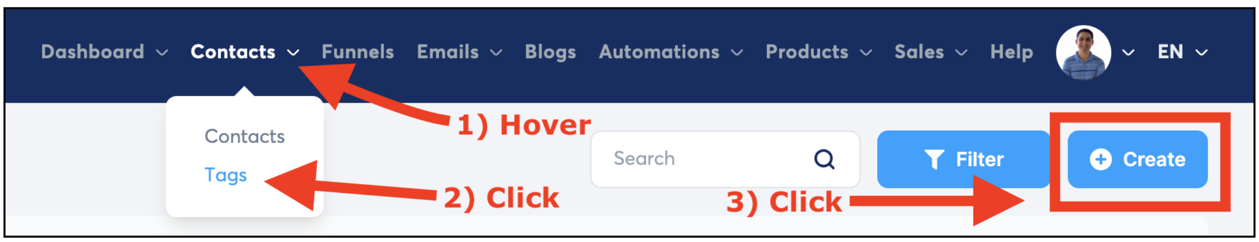
Then I add a second resource which is either a course or a course bundle, sometimes more.

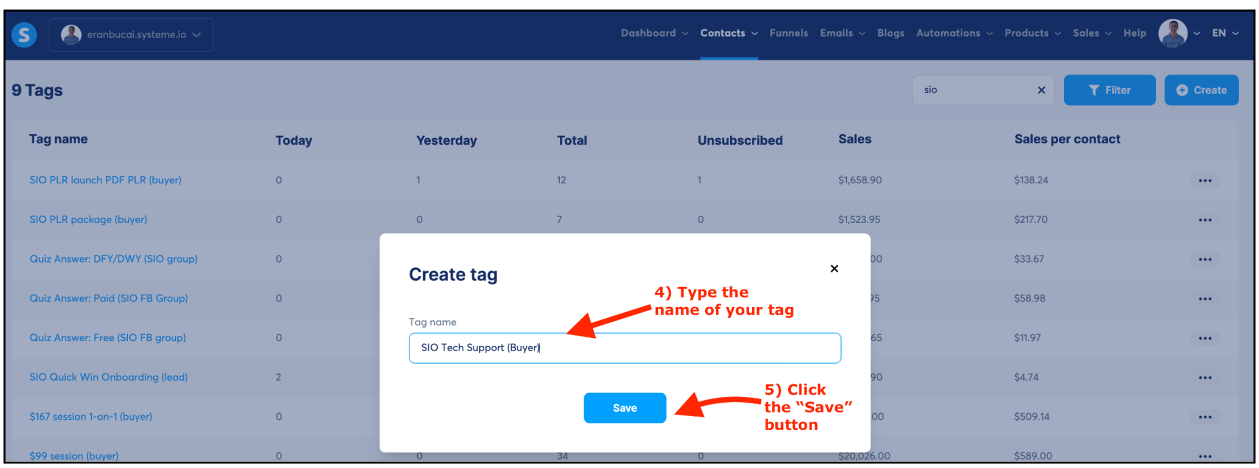
Here is a video demonstration of this:
https://youtu.be/BqtDGdHgflk?si=fIiQMmW2B6hMN2Tq&t=90

How to create a tag

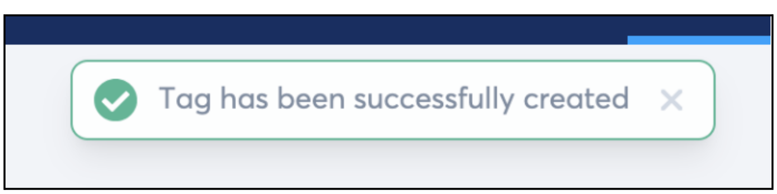
- [ ] Create a tag with these steps:

1) Hover over the menu and see the sub-menu dropdown of “contacts”. Just hover over it and the sub-menu will appear.
2) Then click the “Tags” sub-menu item
3) Then click on “Create” button on the right
4) Type the name of your tag
5) Click the “Save” button





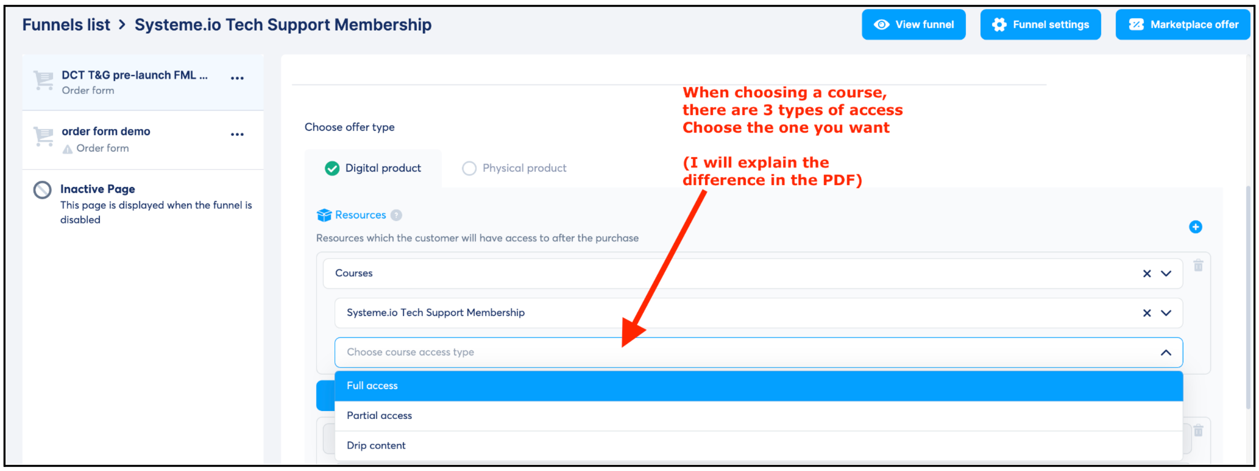
When you do so correctly, you will see this:



Add the product to “Resources”

- [ ] Choose the product access, Course, Bundle or Community.

In this instance, I will show you the course option. This is the screenshot you will see:



- [ ] Choose the type of access.

There are 3 options:

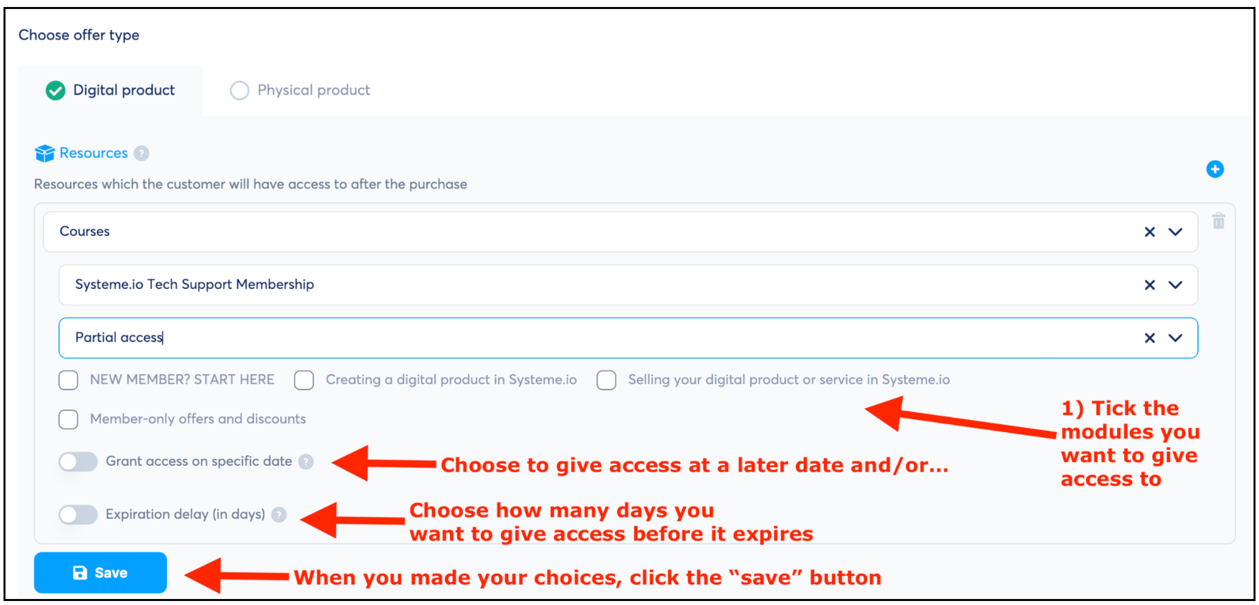
- Full access = access forever. No restrictions.
- Partial Access = Choose to give access to specific modules.
- Drip access = Choose to have the modules be accessible every so often (at a time delay of your choosing)

With each option, you will be able to choose to grant access at a later date. This is a good option if you pre-sold a course, coaching program or digital product.

With the option of partial access and full access, you can give access which expires after X amount of days.

This is great if you want to give bonuses for a limited time (like I do in the Landing Page in a Day $5 course).

This is also great if you want to give a pricing option for limited-time access and then a different price for full access (like I do in my Affiliate Marketing Challenge, $3 for 5 days of access, and $97 for full access).



You can add as many resources as you wish.

There is a lot more to understand about partial access functionality and how you can use this to grow your business and make more money.

After you complete going through this checklist, you can explore these additional video tutorials and training videos on this topic.

Relevant tutorials and training videos:

There are a couple of tutorials where I go into this in more detail with the access levels in case you want to dive deeper into this:

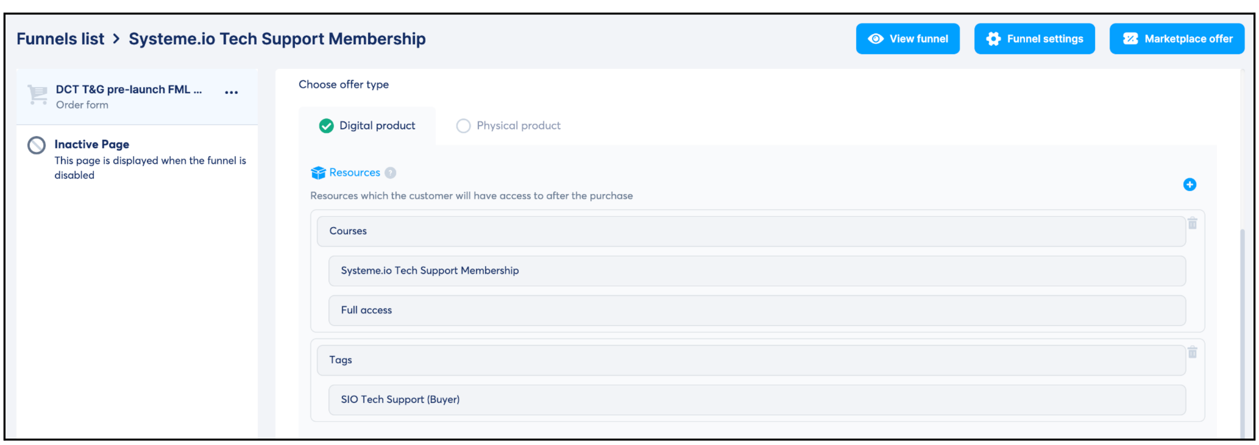
Selling modules in Systeme.io:
How it looks to your customers as cross-sells
https://youtu.be/6AKmoupNXG4

How to sell specific modules or portions of your course in Systeme.io
https://youtu.be/2Z3qYw_7rQE

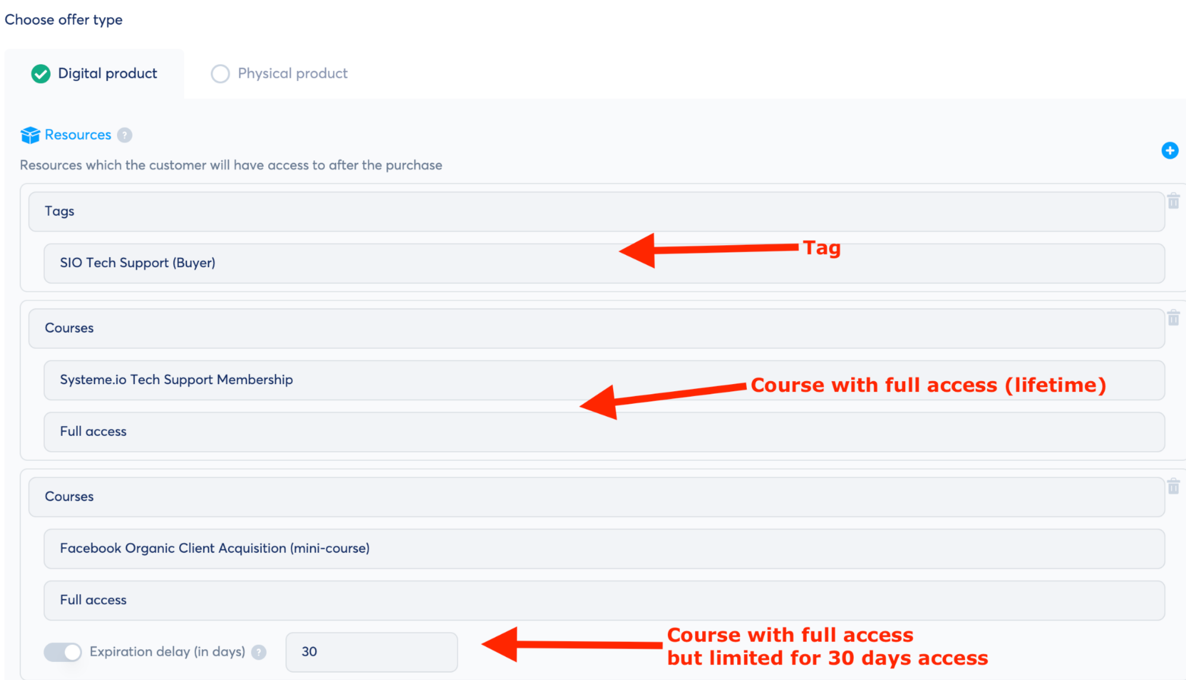
Bundles in Systeme.io, explained
https://youtu.be/V8Vg22Z0KKM

Limited time only bonuses:
how to use them in your business and make your offers better
https://youtu.be/bbxFDnwwhG8

How does it look like when done?
For the most part, keep things simple. Tag and Course. Here is what it would look like:



In my case, I added a bunch of things including tag, course with partial access, course with full access, etc. Here are screenshots:



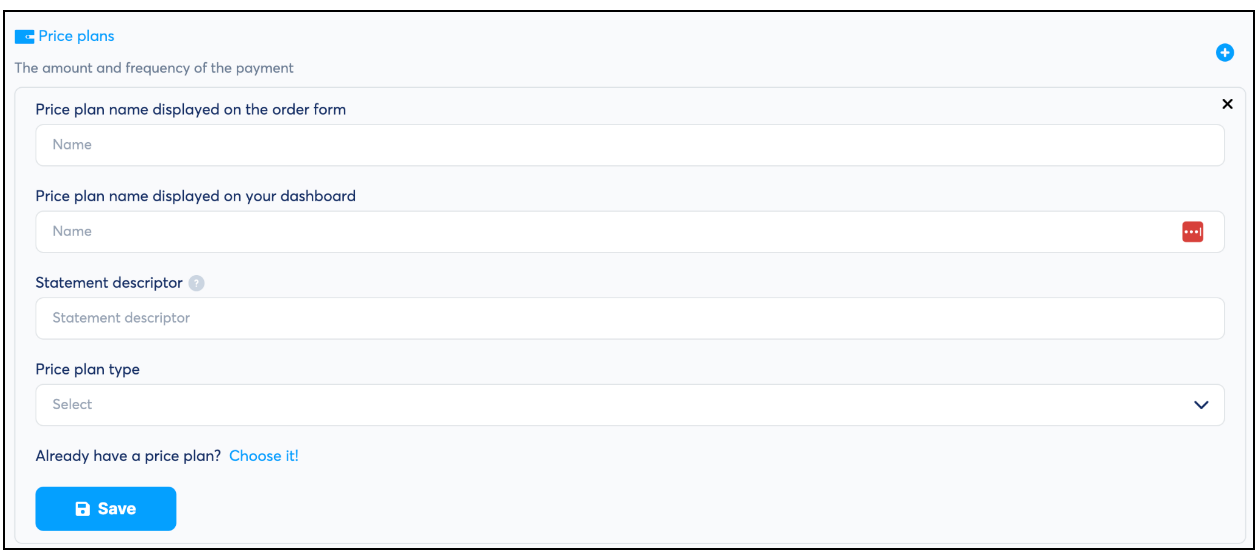
It is important to note that if you give someone access to a product through a subscription, the "resources" will be revoked automatically if they cancel the subscription.   Which brings us to the next step, "**Price Plans**".

Setting up your pricing plan

If you created a pricing plan before for this offer and want to find it, click on the dropdown that says “choose on existing price plan.

I assume you did not, so I will show you how to create one as per the screenshot below.

Once you click the “Create a new one!” you will see a few options to fill out as shown in the following screenshot.



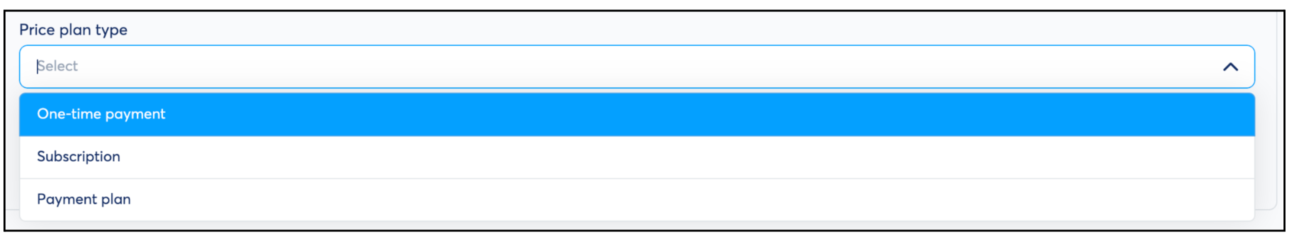
Go ahead and fill these out. Let me explain each step and what it means:

Price plan name displayed on the order form = The name of this pricing plan you want to appear on the order form page itself (visible to your visitors)

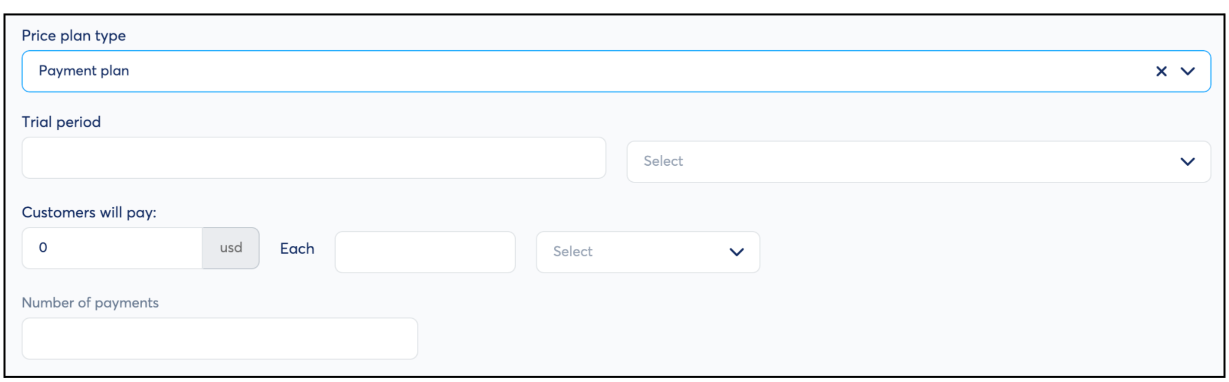
Price plan name displayed on your dashboard = The name of the pricing plan, how you want to be able to identify what it is (this is not visible to your visitors)

Statement descriptor = What do you want it to say on their credit card statement? When a customer purchases from you, a short description of that purchase will show up on the bank statement alongside the charge. Statement descriptors are limited to 22 characters, cannot use the special characters <, >, ', or ", and must not consist solely of numbers.

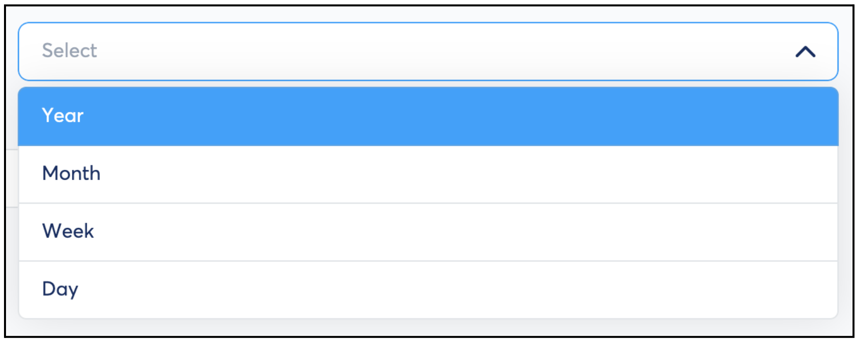
Price plan type = On this step, you click on the dropdown on the right and you will have 3 options appear as you can see in this screenshot.



One-time payment = you will just need to enter the amount and click “Save”.
Payment plan = will show you a few options to type in.



If you don't want a trial, enter 0 then select any dropdown (it does not matter).

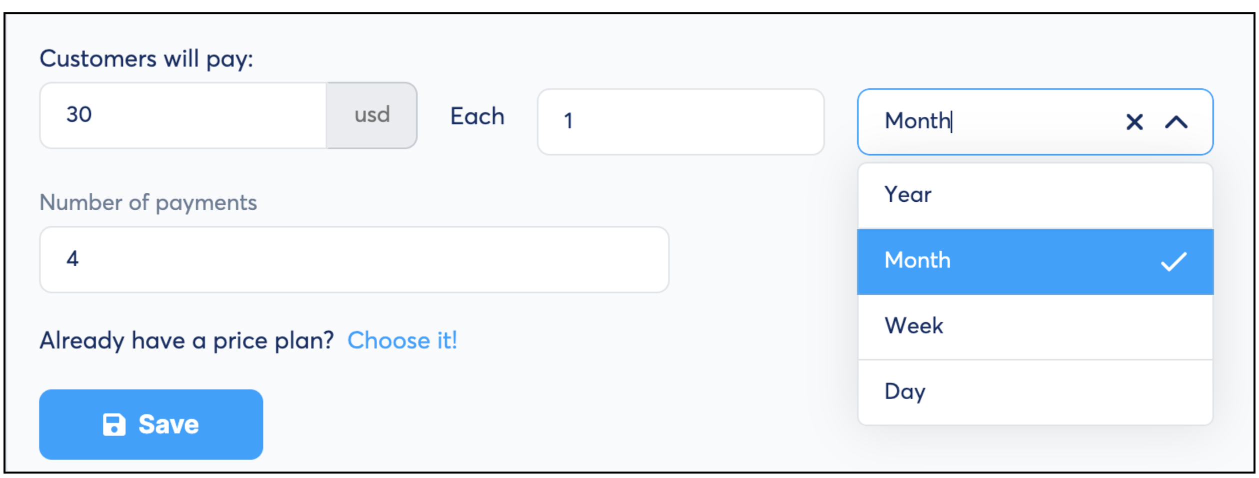


If you want a trial, choose X days, weeks, month or year and enter the desired number. Examples:

- 2 weeks trial = 2 + week
- 3 months trial = 3 + month
- 1 year free = 1 + year
- 3 days trial = 3 + day

You get the idea.
Now set up the amount they pay. The amount, how often, and how many payments.

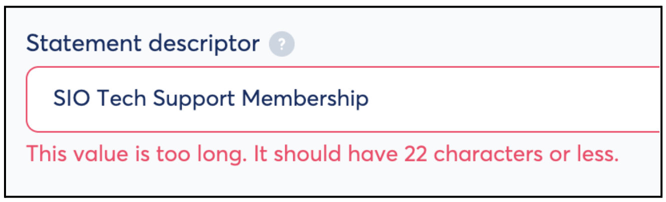
In the screenshot example, you see the customer will pay $30 every month for 4 months (if you do your math, that's $120 total in the payment plan).



Subscription = will show you the same options to type in, not including "Number of payment" as it is a subscription and it will be recurring.

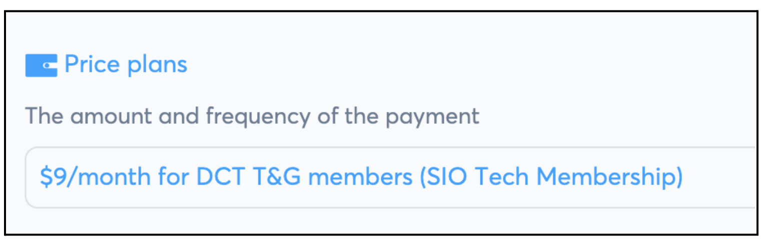
In the example I am using to create this checklist from, it is a subscription and here is what the final result looks like.

Note on the "Statement descriptor" can only be 22 characters so if it is longer you'll get this error:

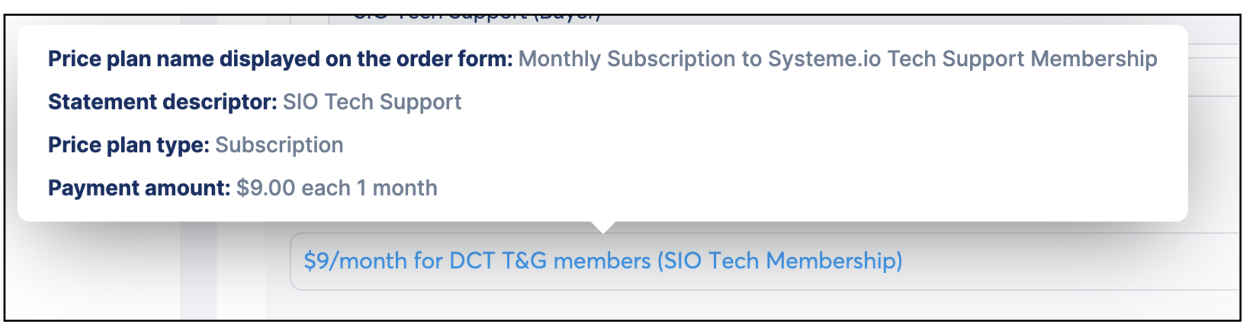


You will need to shorten it while still making it obvious to them if they look at their credit card statement what they paid for. This will help eliminate/reduce refund requests.

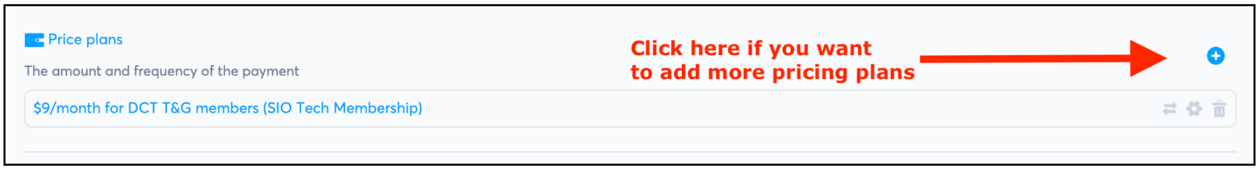
Once you have done so correctly, you'll see something like this:



If you hover over the pricing plan, you will see the pricing plan details.



If you want to add more pricing plan, you have that option as pictured below.

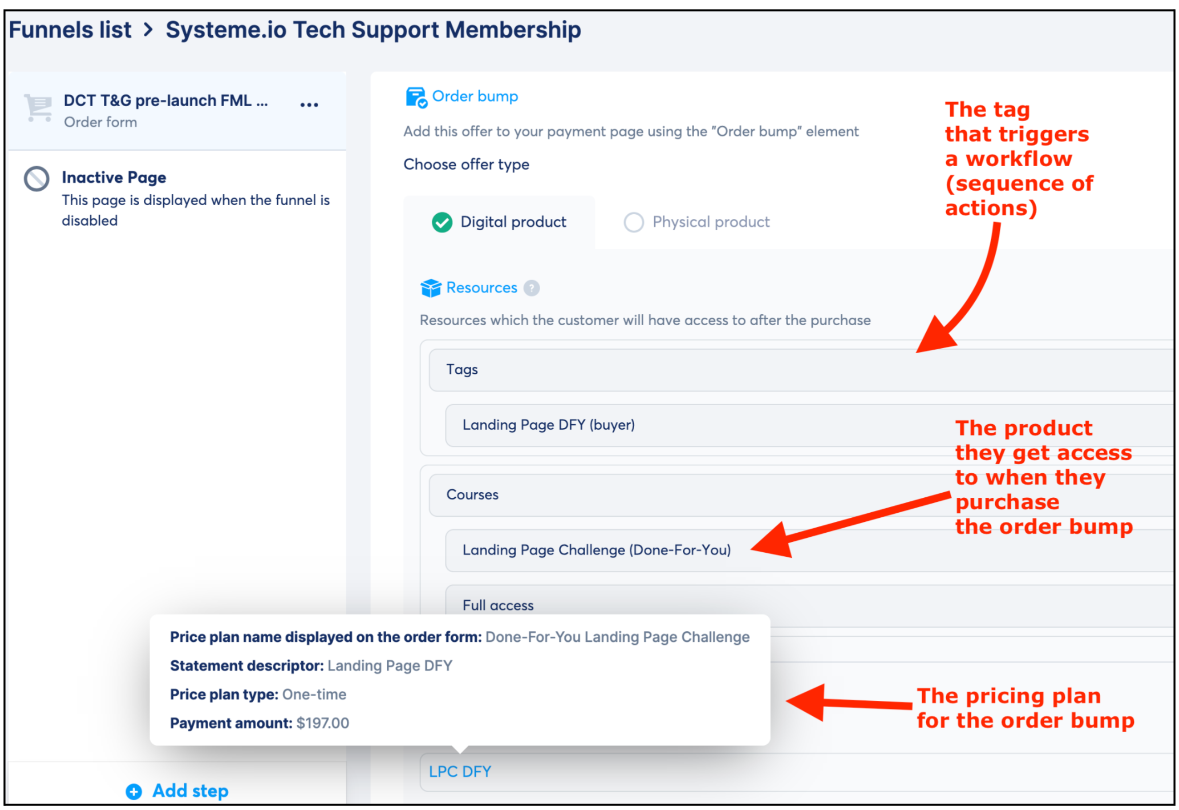


If you add more pricing plans, here is what it will look like:

Adding an Order Bump

Adding an order bump is in fact, the identical process to setting up a pricing plan. **There is zero difference.**

Add "Resources", add "Price plans", and save. Here is what it would look like:

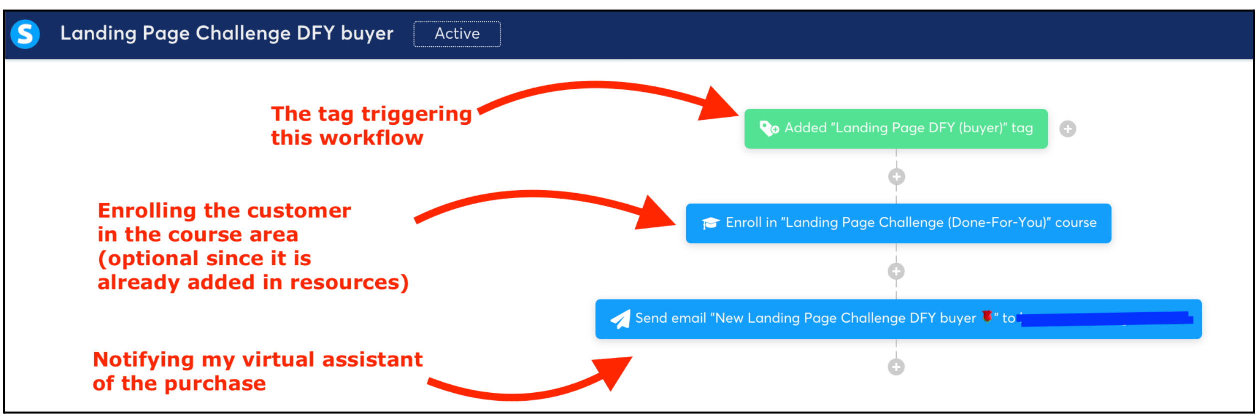


Now, if you wanted to trigger an email (or other sequence of actions) that goes out ONLY if someone bought from you the order bump, you would set up a tag for the order bump purchase.

Then under “Workflows” you will set up an automation where you trigger with the order bump tag, and the action is sending an email.

In the case of my order bump, it is a service that requires notifying my virtual assistant team of the purchase so they can follow up with an onboarding call and proceed to service this new customer.

So here is what my automation workflow looks like:



There are more advanced strategies you can use when setting up an order form and order bump which include things like:

- 1-step checkout, pros and cons
- 2-step checkout, pros and cons
- Cart abandonment email sequence set up

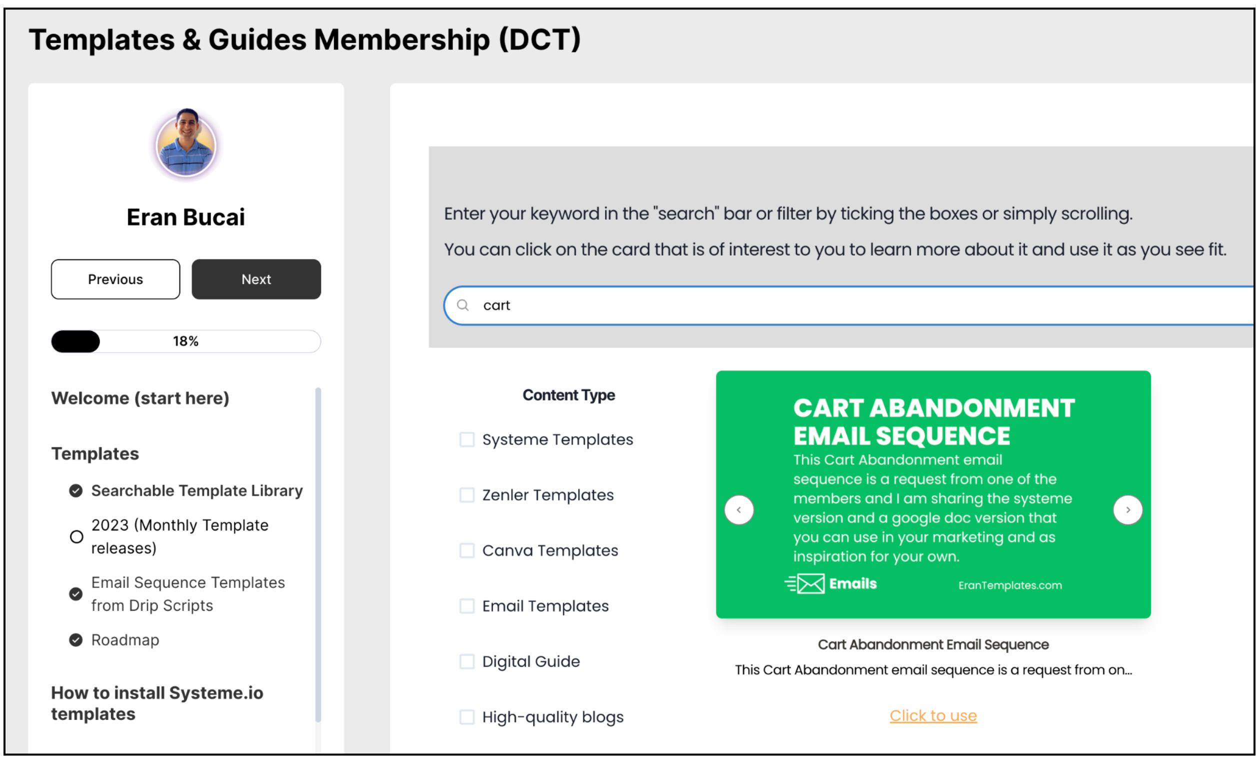
And more.

You can learn more about these in my video tutorial:

Order bump tutorial in Systeme.io (A to Z tutorial on ALL your options)
https://www.youtube.com/watch?v=SPPgU3Ot2ds

Cart Abandonment Email Sequence and automation

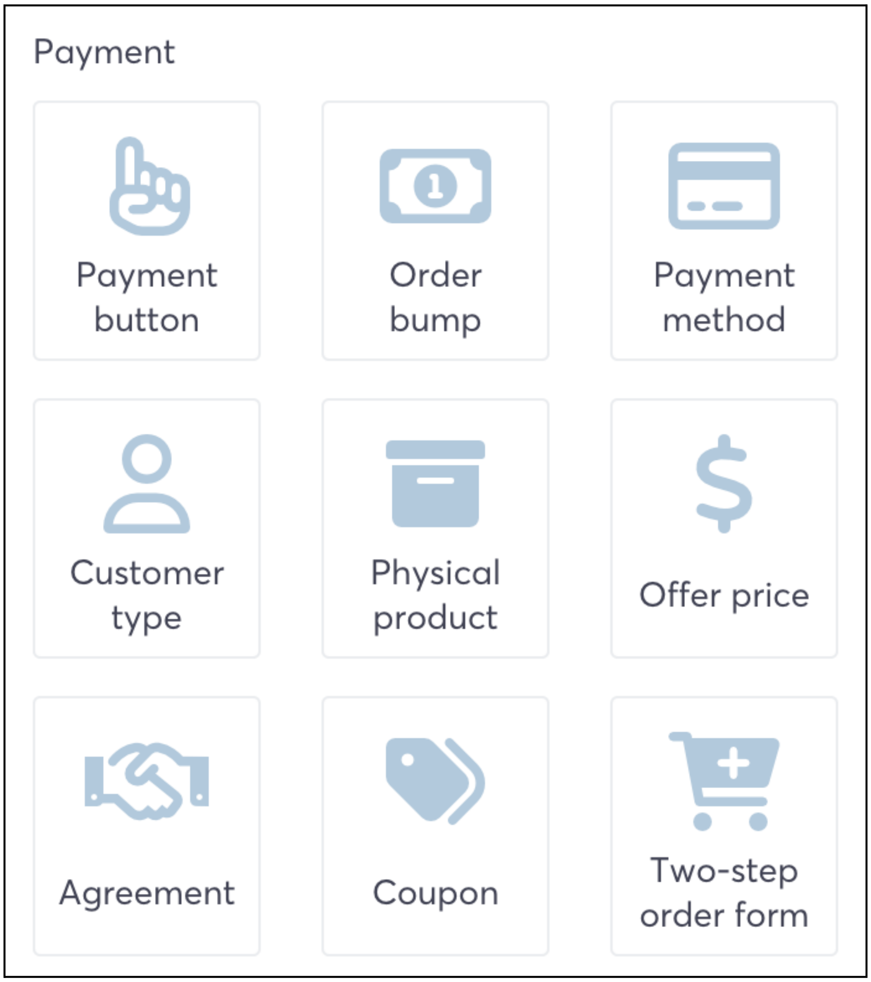
I have an email sequence template for cart abandonment and also an entire checklist on setting up the entire thing in my Templates & Guides membership.



If you are already a member, you should be able to login here to find it (as pictured above).

The Order Form Editor steps

In the editor steps, there are several elements you need to make sure are on the page, as pictured below.



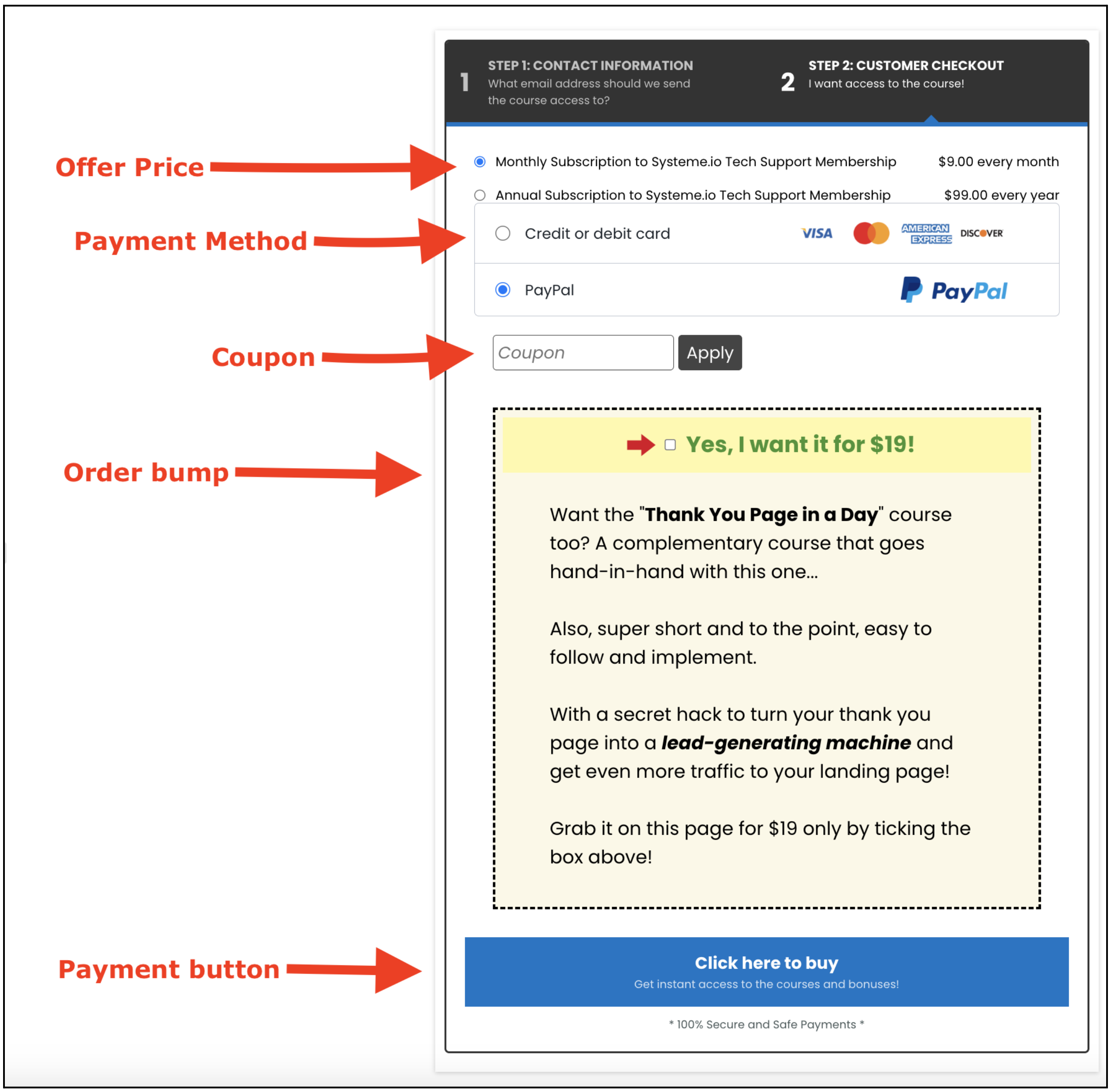
The minimum elements you need to have on the page are:

- Payment method
- Payment Button

All the other elements are optional.

If you have added an Order Bump in the automation, you can now add the "Order Bump " Element and customize it.

In the screenshot example below, you are seeing me use the "Two -step order form" and inside in "step 2" I have the various elements of the editor being used.



You need to customize this order form page with all the information needed to help with conversions.

Testimonials, bullet recap of what they are getting, bonuses, etc.

Pro tip: This order form that I created is the order form AND the sales page on the same page. That way there is less friction and fewer clicks.

I like that way of selling digital products. If you see other digital products I offer, I have the order form on the same page as my sales page.

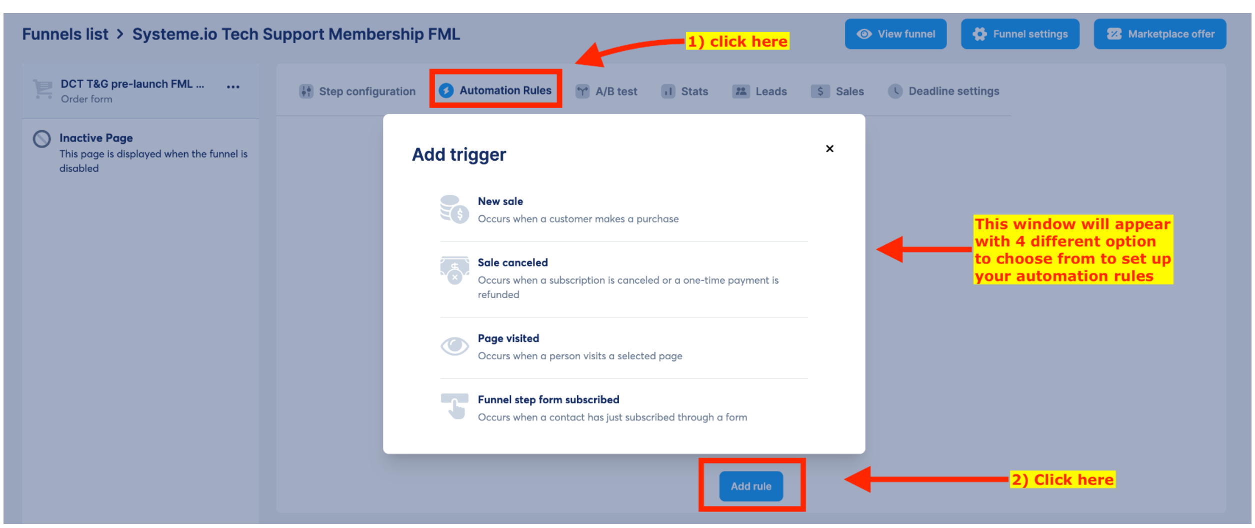
[Testimonials & Social Proof Workshop]

[Pre-Selling Your First Digital Product Workshop & Template]

[Managing & Hiring Virtual Assistants Course]

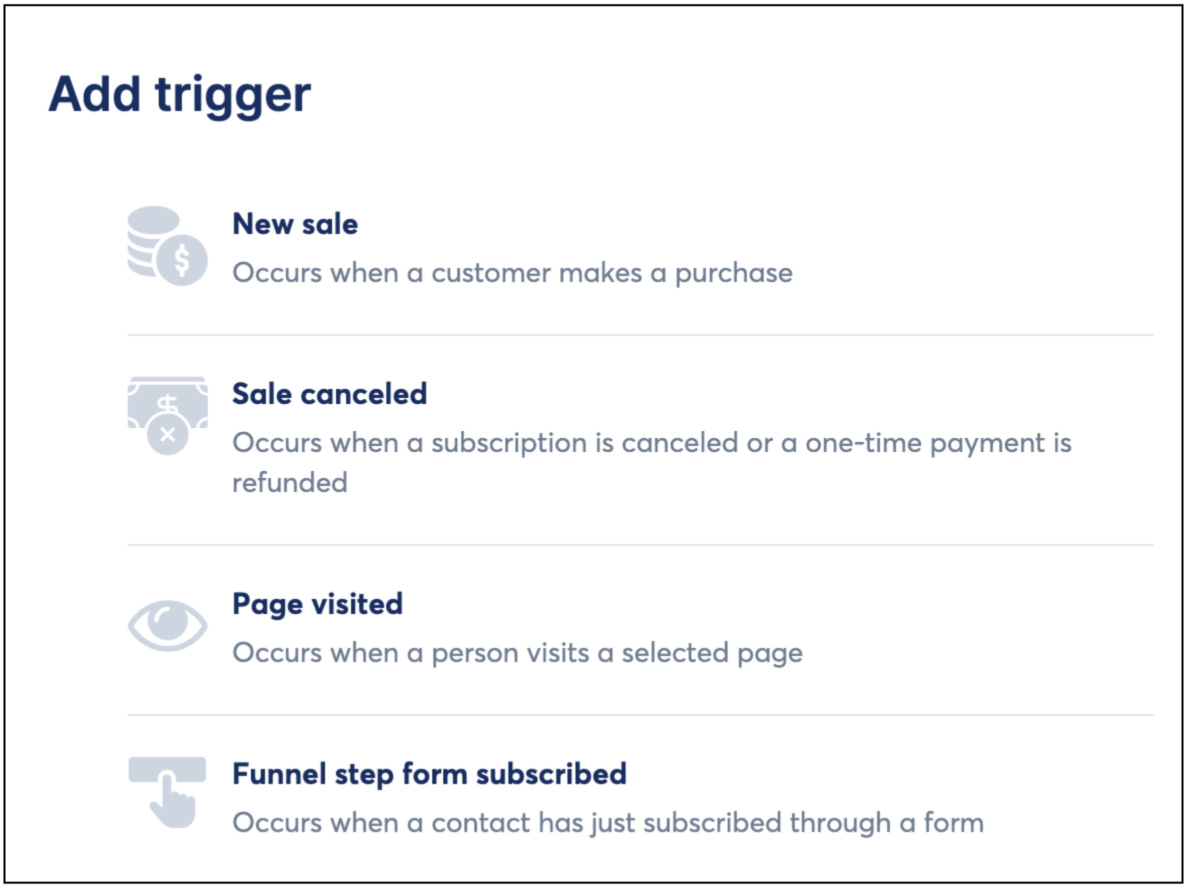
And of course, my Systeme.io Tech Support Membership.

This checklist would not be complete, without setting up "Automation Rules".



Automation Rules

These are the categories (aka *Triggers*) for "**automation rules**".

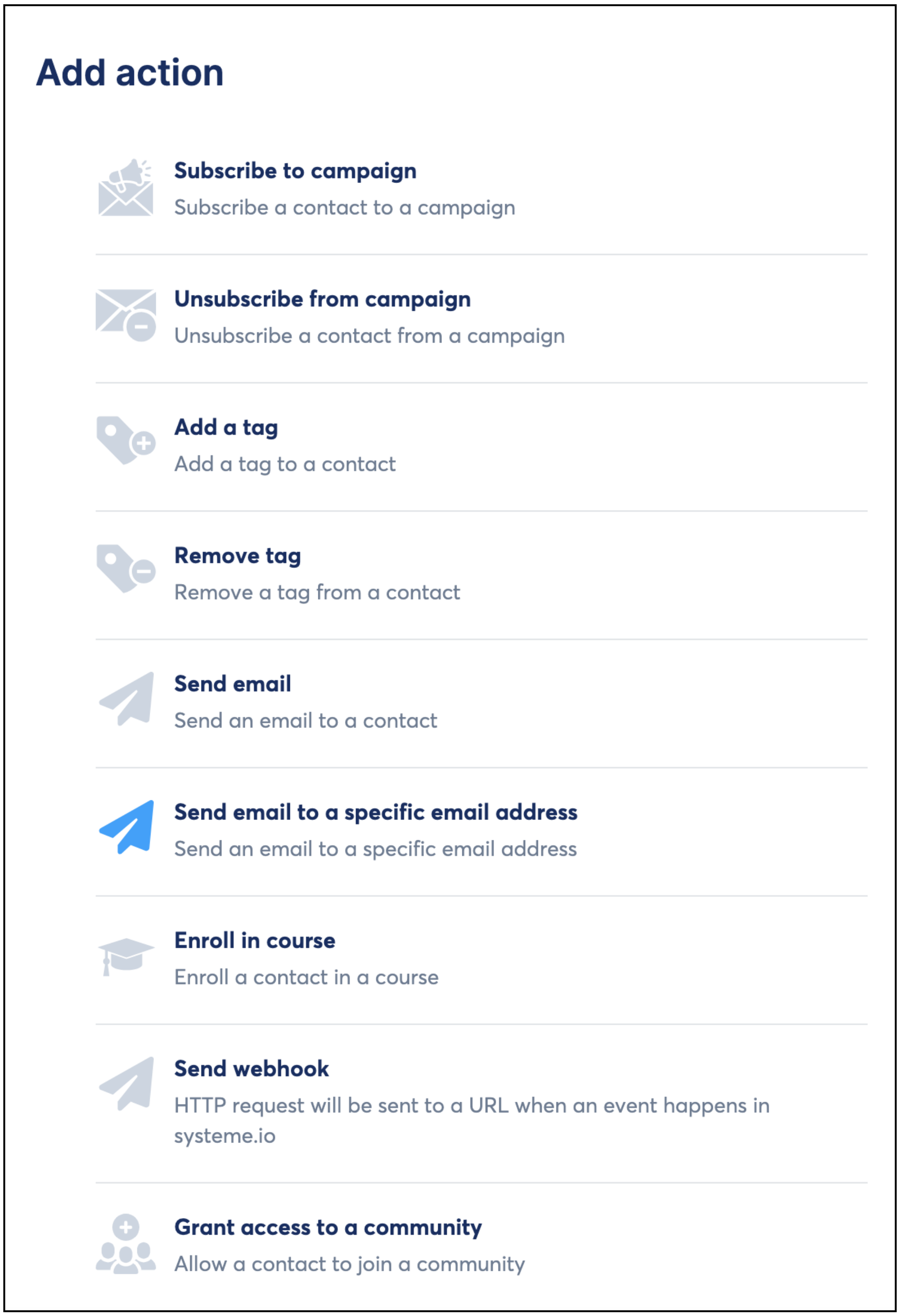


You need to think about "**what is the action you want to occur when… [one of the 4 options above takes place]?**"

Do you want to add a tag, remove a tag, subscribe to an email sequence campaign, unsubscribe from an email sequence campaign, notify someone on your team, get a notification yourself, add them to a community, etc.

Here are all the options for the automation rules you can add to each category. I recorded a video to explain what each means, and when you would use each.

⇒ Click here to watch the video



In the interest of keeping things simple for you, I recommend you do one or all of these options, depending on what is applicable:

- [ ] "**Send email to a specific email address**" - notify yourself of a sale with the person's information.

If you have someone on your team you need to notify of the sale, do the same rule.

- [ ] If you want to have a custom welcome email to the person, use "**Send email**" (if it is 1 email only)

- [ ] Optional: If you want to send more 2 emails or more over the coming days/weeks/months as part of an onboarding to a membership or course or coaching or service, use the "**Subscribe to campaign**".

Automation Rules for "Add a tag", "enroll in course", and "enroll in community", use the "Resources" feature under "Step configuration" as explained earlier in this checklist.

Additional resources and tutorials:

Cart Abandonment Email Sequence Automations set up in Systeme.io
https://youtu.be/4JZDtJP4Hw0

Order bump tutorial in Systeme.io (A to Z tutorial on ALL your options)
https://youtu.be/SPPgU3Ot2ds

Email Marketing tutorial for Systeme.io
(Everything you need to know from A to Z)

https://youtu.be/R81LMTRykrc

Membership Offboarding Training
https://youtu.be/D41YQI7WUSg

Coupons

Coupons and special offers tutorial in Systeme.io
https://youtu.be/-vhblhqMamE

Final Words:

If you have any input or feedback on this checklist, please leave a comment on any of the YouTube videos relevant to your query so I can make sure I help you figure things out.

If you feel you need extra help with my support team, definitely check out joining my Tech Support membership for Systeme.io.

Thanks for checking out this checklist!

Eran Bucai