

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.

9 TYPES OF DIGITAL PRODUCTS YOU CAN SELL WITH SYSTEME.IO

"Courses" are NOT just courses in Systeme.io...

- | | | |
|------------------------------|---------------------------|---------------------------------------|
| ① Challenges | ② Virtual Summit | ③ eBook (with bonuses) |
| ④ Workshops | ⑦ Membership | ⑥ Courses |
| ⑤ Lead Magnet
Mini-Course | ⑧ Templates
And/or PLR | ⑨ DFY Services
or Coaching Program |

PS - Yes, every one of the below digital products & services
I have personally set up for myself in Systeme.io and it's awesome!

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:

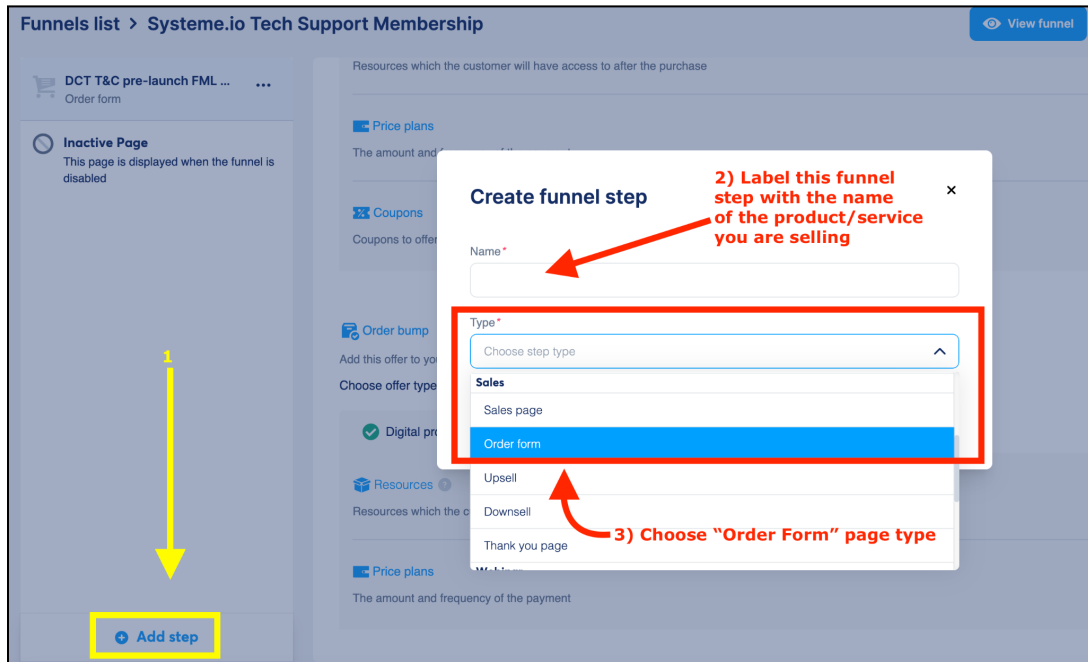
- Click on “Create”.
- Then label your funnel (I usually name it the product/service/launch that I want to sell with this funnel)
- Choose the domain name (use the default one you are given, or my recommendation is to connect your domain name)
- Choose the goal of your funnel (I usually just start with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

The screenshot shows the 'Create funnel' modal window overlaid on a list of existing funnels. The modal window contains the following elements and annotations:

- 1) Click on "create" Then the box on the left will appear:** A red arrow points from a yellow text box to the 'Create' button in the top right corner of the main interface.
- 2) Name your funnel the name of your product/service/launch:** A red arrow points from the text to the 'Name' input field.
- 3) Choose the right domain name:** A red arrow points from the text to the 'Funnel domain' dropdown menu.
- 4) Choose the currency you are selling at:** A red arrow points from the text to the 'Currency' dropdown menu.
- 5) Choose funnel goal (see my note):** A red arrow points from the text to the 'Choose your funnel goal' section, which contains four options: 'Build an audience', 'Sell', 'Custom', and 'Run an evergreen webinar'.

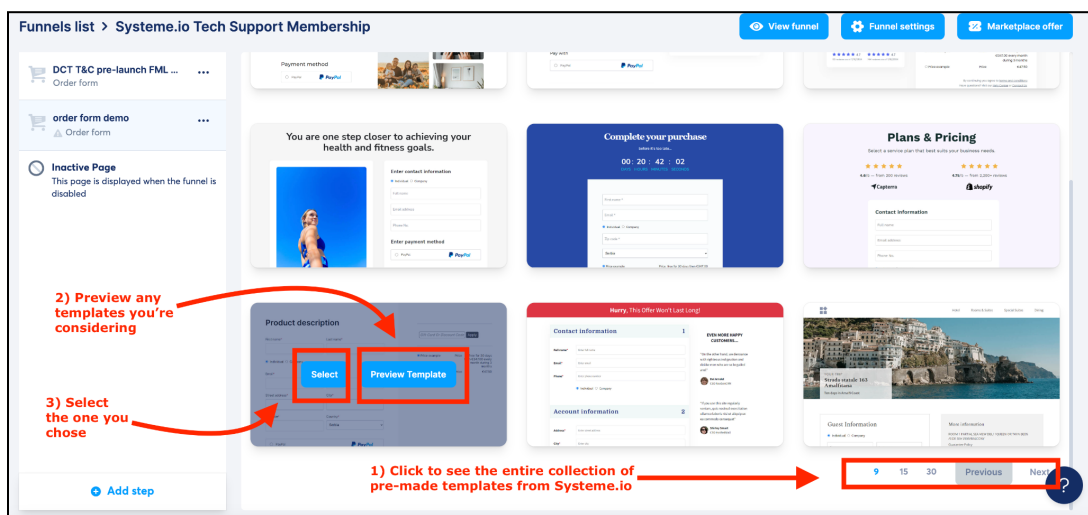
The background shows a list of funnels with columns for dates and times, and a 'Filter' button.

- ❑ 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).

Templates & Guides Membership (DCT)

Eran Bucai

Previous Next

18%

Welcome (start here)

Templates

- Searchable Template Library
- 2023 (Monthly Template releases)
- Email Sequence Templates from Drip Scripts
- Roadmap

How to install Systeme.io templates

Content Type

- Systeme Templates
- Zenler Templates
- Canva Templates
- Email Templates
- Digital Guide
- High-quality blogs

LOW-TICKET DIGITAL PRODUCT 1-PAGE SALES PAGE TEMPLATE

This is perfect for you to sell a digital product on Systeme.io for under \$100 and also use in Facebook Advertising.

[systeme.io](#) EranTemplates.com

Low Digital Product 1-page sales page
This is perfect for you to sell a digital product on Syst...

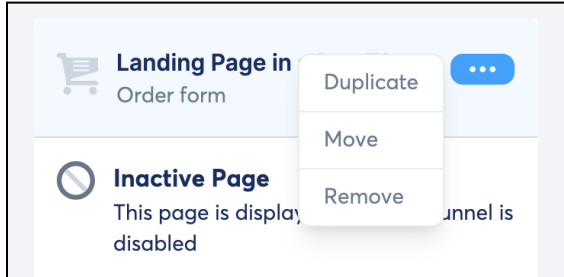
[Click to use](#)

This is the template from the members area

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

[Landing Page in a Day 1-page \(T&G template\)](#)

- 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.

A screenshot of a form for setting up an order form. It has two main sections. The first section is labeled 'Name' with a red asterisk. It contains a text input field with the value 'DCT T&G pre-launch FML \$9/month'. The second section is labeled 'URL Path' with a red asterisk and a small globe icon. It contains a text input field with the value 'https://members.dotcomtruths.com/sio-tech-support-membership-dct-tg-pre-launch-fml-2t4gr3v89e'. There is a small link icon to the right of the URL path input field.

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.

— Affiliate commissions*

Affiliate commissions*	Commission payout delay*
<input type="text" value="0"/> %	<input type="text" value="30"/> Days

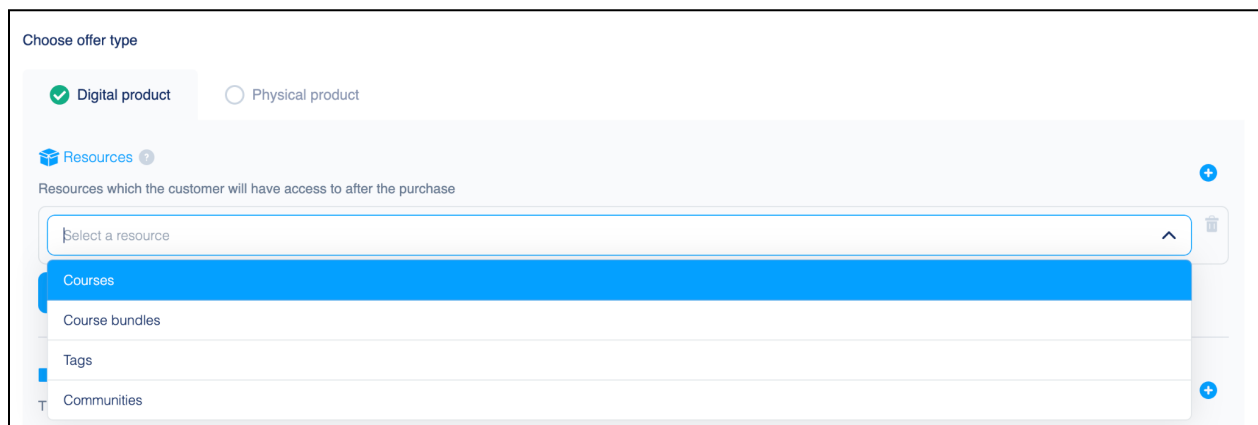
Once you set up an affiliate commission, anyone who promotes this order form with their affiliate link included will earn this commission depending on what you set up.

(**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?



The screenshot shows a user interface for selecting resources. At the top, there are two radio buttons: 'Digital product' (checked) and 'Physical product'. Below this is a 'Resources' section with a plus icon and a dropdown menu. The dropdown menu is open, showing a search bar with the text 'Select a resource' and a list of options: 'Courses' (highlighted in blue), 'Course bundles', 'Tags', and 'Communities'. There are also plus and trash icons on the right side of the dropdown menu.

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.

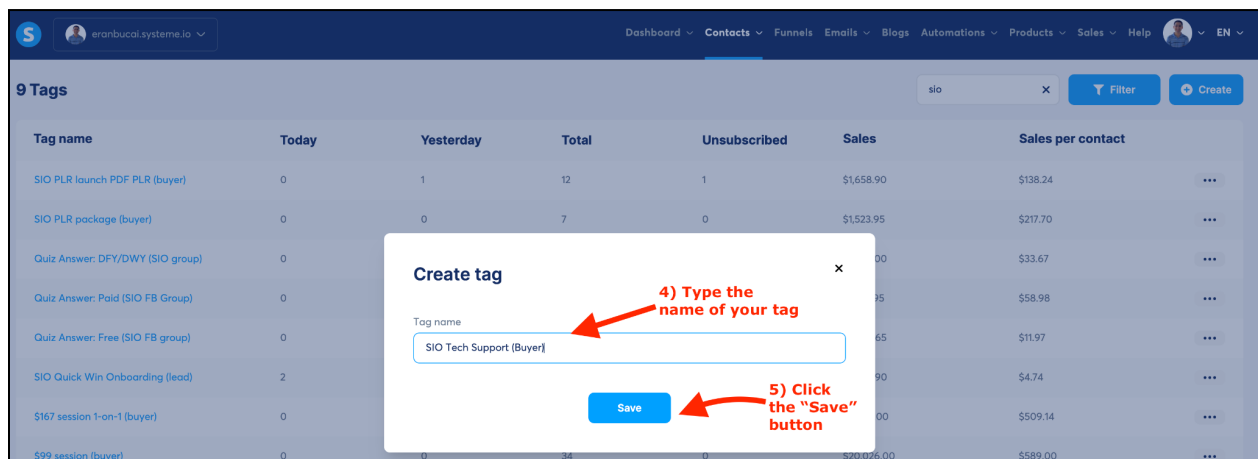
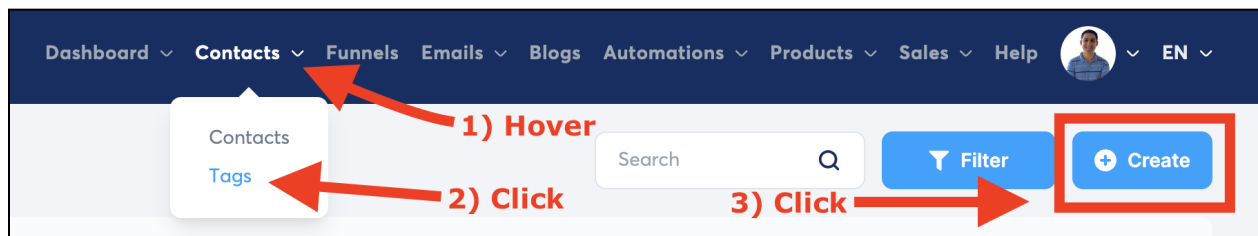
Here is a video demonstration of this:

<https://youtu.be/BqtDGdHgflk?si=fliQMmW2B6hMN2Tq&t=90>

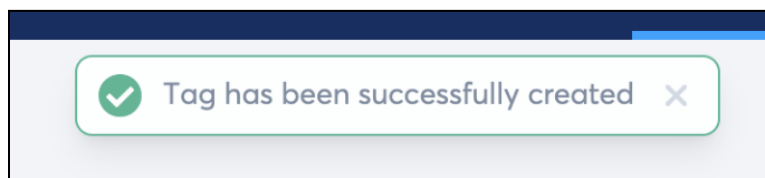
How to create a tag

□ 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



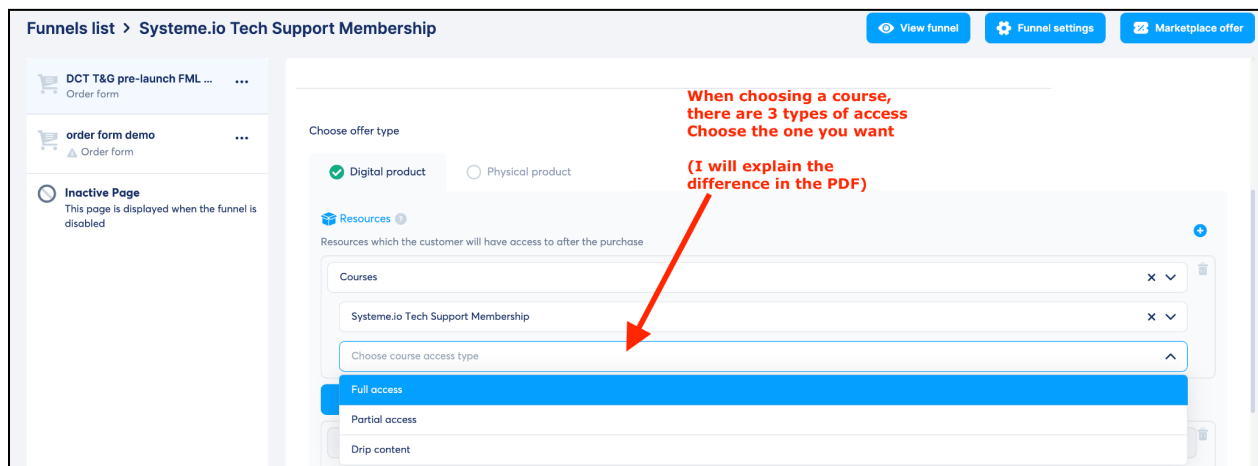
When you do so correctly, you will see this:



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).

The screenshot shows the 'Choose offer type' configuration page in Systeme.io. It features two radio buttons: 'Digital product' (selected) and 'Physical product'. Below this is a 'Resources' section with a plus icon and a trash icon. The resources list includes 'Courses', 'Systeme.io Tech Support Membership', and 'Partial access', each with a close (x) and dropdown (v) icon. Underneath are several checkboxes: 'NEW MEMBER? START HERE', 'Creating a digital product in Systeme.io', 'Selling your digital product or service in Systeme.io', 'Member-only offers and discounts', 'Grant access on specific date', and 'Expiration delay (in days)'. A blue 'Save' button is at the bottom left. Red arrows point from text annotations to the 'Grant access on specific date' and 'Expiration delay (in days)' options, and another red arrow points to the 'Save' button.

Choose offer type

Digital product Physical product

Resources

Resources which the customer will have access to after the purchase

Courses x v

Systeme.io Tech Support Membership x v

Partial access x v

NEW MEMBER? START HERE Creating a digital product in Systeme.io Selling your digital product or service in Systeme.io

Member-only offers and discounts

Grant access on specific date

Expiration delay (in days)

Save

1) Tick the modules you want to give access to

Choose to give access at a later date and/or...

Choose how many days you want to give access before it expires

When you made your choices, click the "save" button

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>

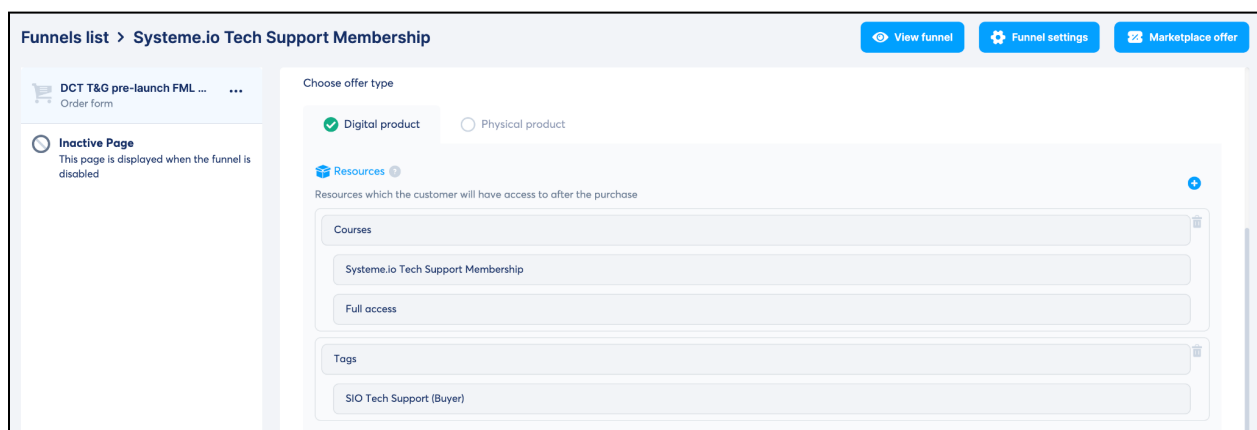
Limited time only bonuses:

how to use them in your business and make your offers better

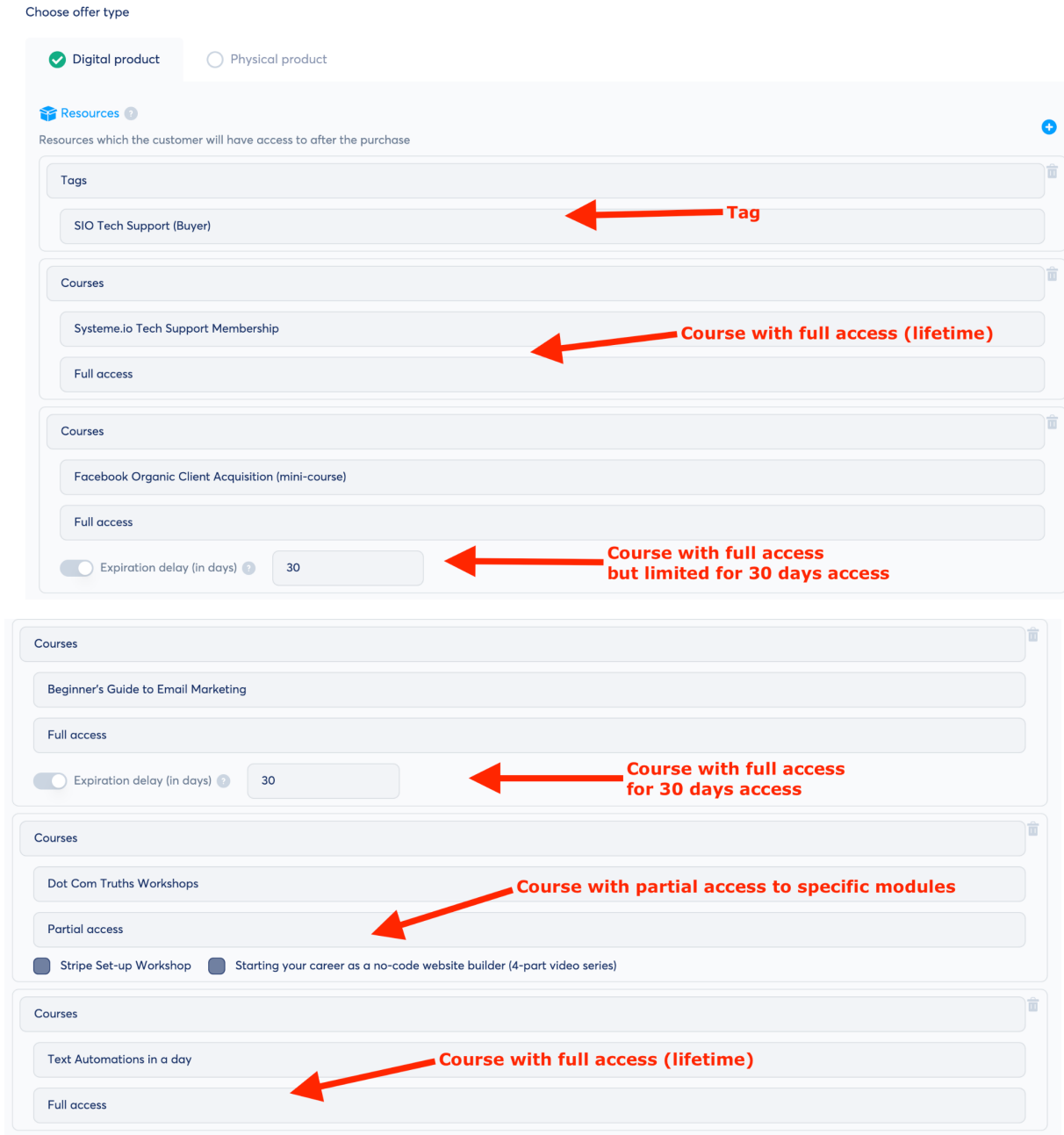
<https://youtu.be/bbxFDnwwhG8>

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:

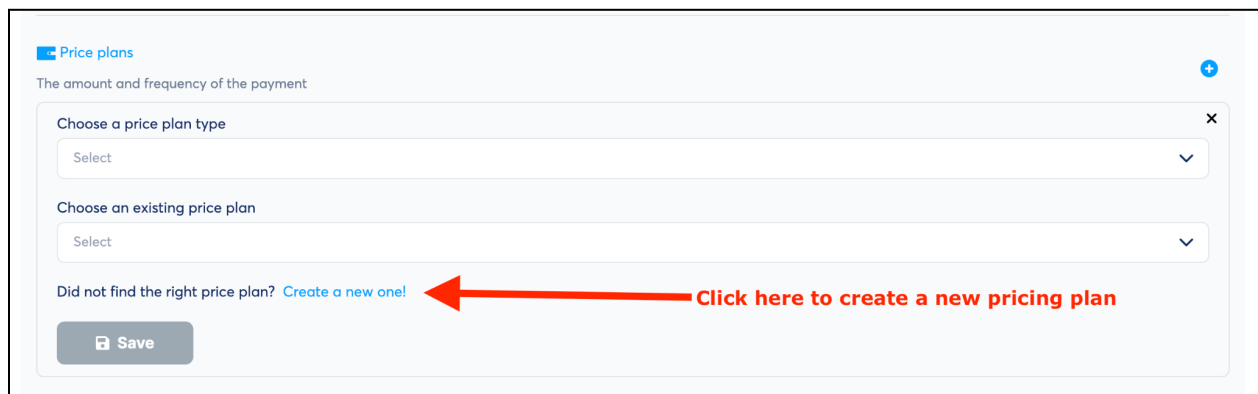


It is important to note that if you give someone access to a product through a subscription, the “resources” will be revoked automatically if they cancel the subscription. Which brings us to the next step, “**Price Plans**”.

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.



The screenshot shows a form titled "Price plans" with the subtitle "The amount and frequency of the payment". It contains two dropdown menus: "Choose a price plan type" and "Choose an existing price plan", both with "Select" as the current option. Below these is a link that says "Did not find the right price plan? [Create a new one!](#)". A red arrow points from the text "Click here to create a new pricing plan" to this link. At the bottom left is a "Save" button.

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



The screenshot shows the same "Price plans" form, but now with several input fields. The "Price plan name displayed on the order form" field has "Name" entered. The "Price plan name displayed on your dashboard" field also has "Name" entered. The "Statement descriptor" field has "Statement descriptor" entered. The "Price plan type" dropdown menu is still set to "Select". At the bottom left is a "Save" button. A link at the bottom says "Already have a price plan? [Choose it!](#)".

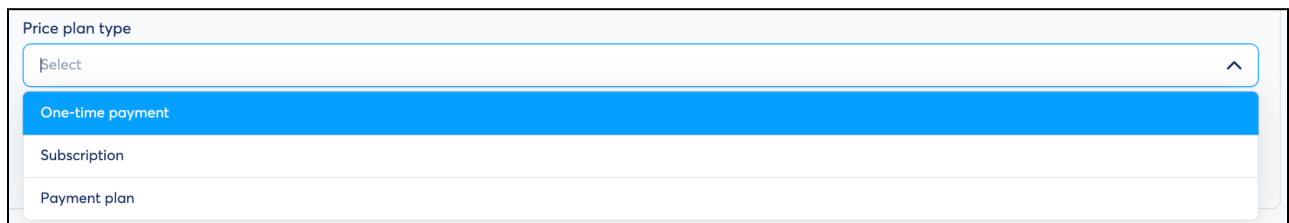
Go ahead and fill these out. Let me explain each step and what it means:

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.

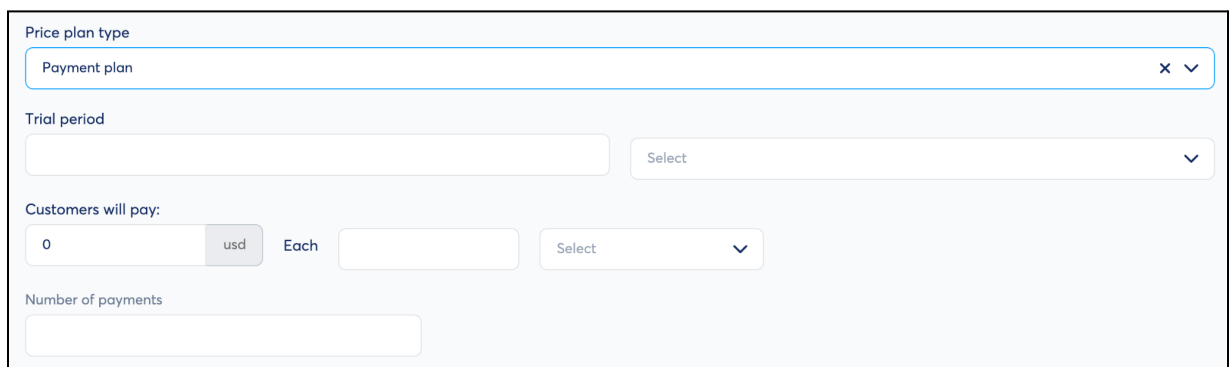
Price plan type = On this step, you click on the dropdown on the right and you will have 3 options appear as you can see in this screenshot.



The screenshot shows a dropdown menu titled "Price plan type". The menu is open, displaying three options: "One-time payment" (highlighted in blue), "Subscription", and "Payment plan". The dropdown is currently set to "Select".

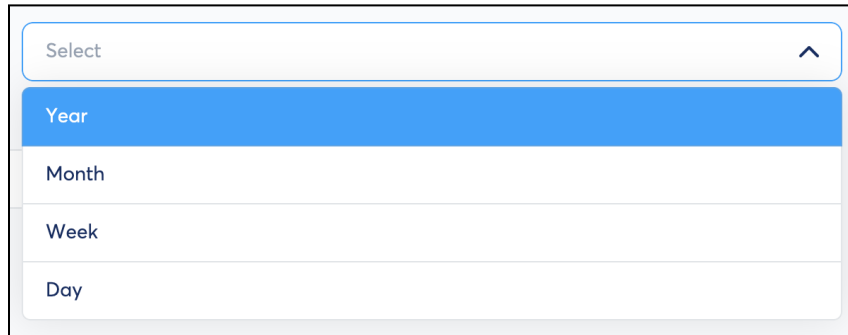
One-time payment = you will just need to enter the amount and click "Save".

Payment plan = will show you a few options to type in.



The screenshot shows a form titled "Price plan type" with "Payment plan" selected. Below the dropdown, there are several input fields: "Trial period" (a text box and a "Select" dropdown), "Customers will pay:" (a text box with "0", a "USD" button, the word "Each", another text box, and a "Select" dropdown), and "Number of payments" (a text box).

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



A screenshot of a dropdown menu. The menu is open, showing a list of options: "Select", "Year", "Month", "Week", and "Day". The "Year" option is currently selected and highlighted in blue. The "Select" option is at the top, and there is a small upward-pointing arrow icon to its right.

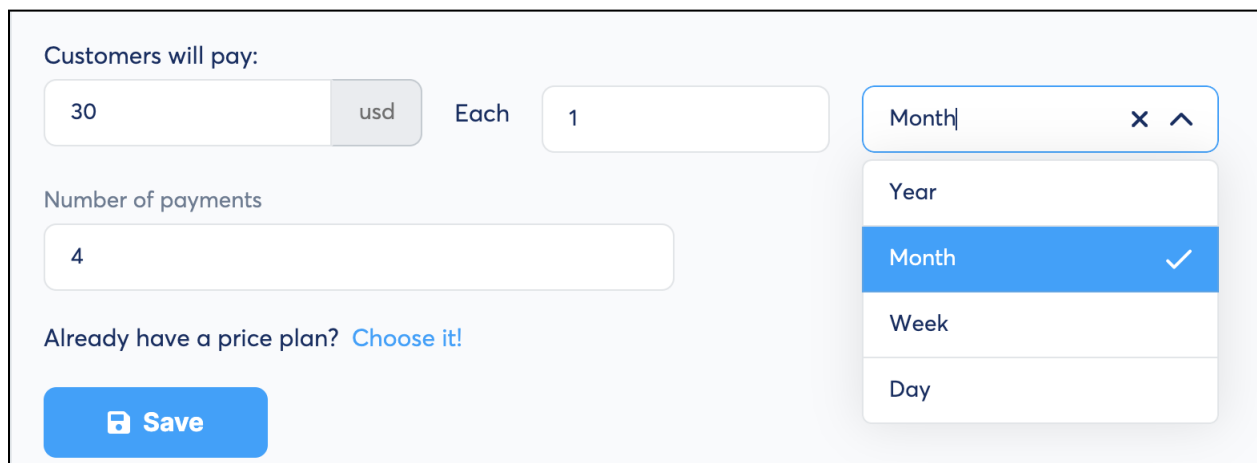
If you want a trial, choose X days, weeks, month or year and enter the desired number. Examples:

- 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).



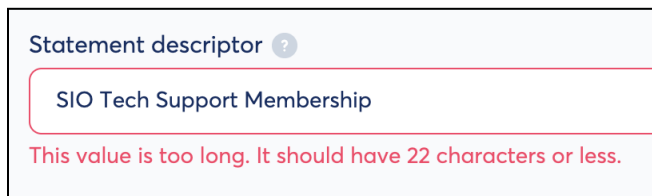
A screenshot of a payment plan configuration form. The form is titled "Customers will pay:" and contains the following fields and options:

- A text input field containing "30".
- A dropdown menu showing "usd".
- The word "Each" followed by a text input field containing "1".
- A dropdown menu showing "Month", with a close button (X) and an upward arrow (^).
- A dropdown menu showing "Year", "Month" (selected with a checkmark), "Week", and "Day".
- A text input field labeled "Number of payments" containing "4".
- A link: "Already have a price plan? [Choose it!](#)".
- A blue button with a save icon and the text "Save".

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:



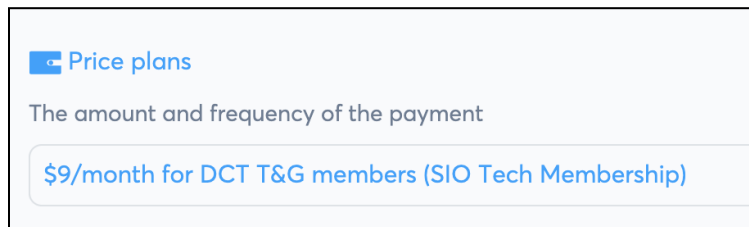
Statement descriptor ?

SIO Tech Support Membership

This value is too long. It should have 22 characters or less.

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:

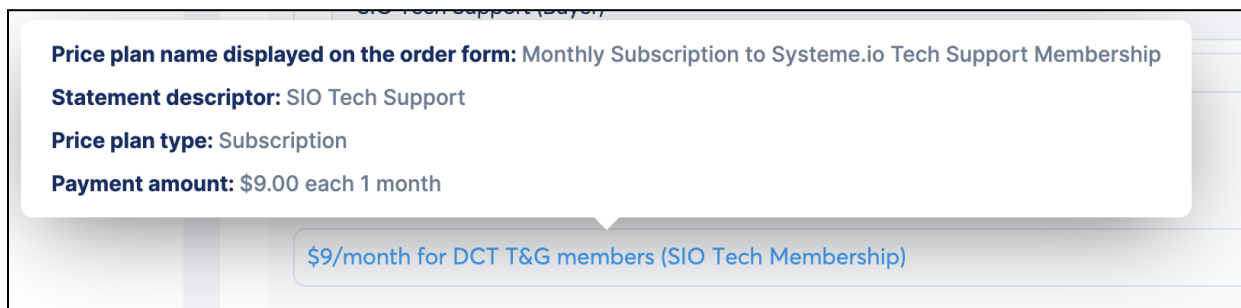


Price plans

The amount and frequency of the payment

\$9/month for DCT T&G members (SIO Tech Membership)

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



Price plan name displayed on the order form: Monthly Subscription to Systeme.io Tech Support Membership

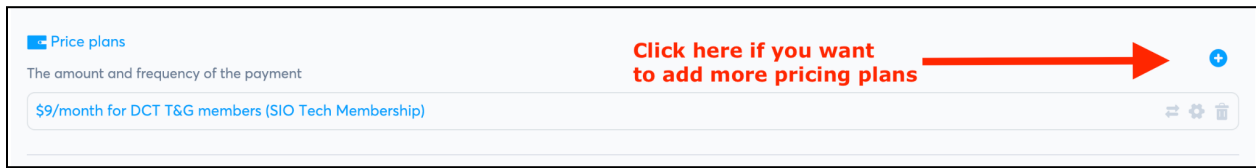
Statement descriptor: SIO Tech Support

Price plan type: Subscription

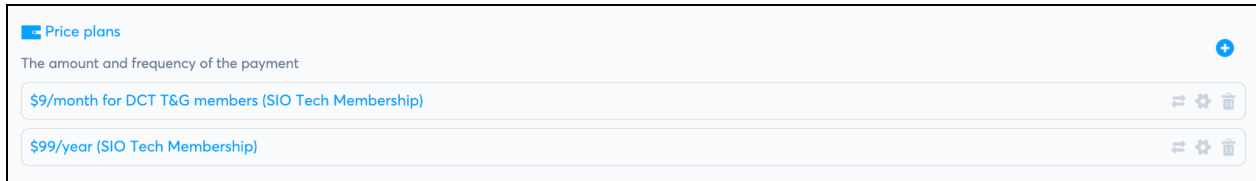
Payment amount: \$9.00 each 1 month

\$9/month for DCT T&G members (SIO Tech Membership)

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



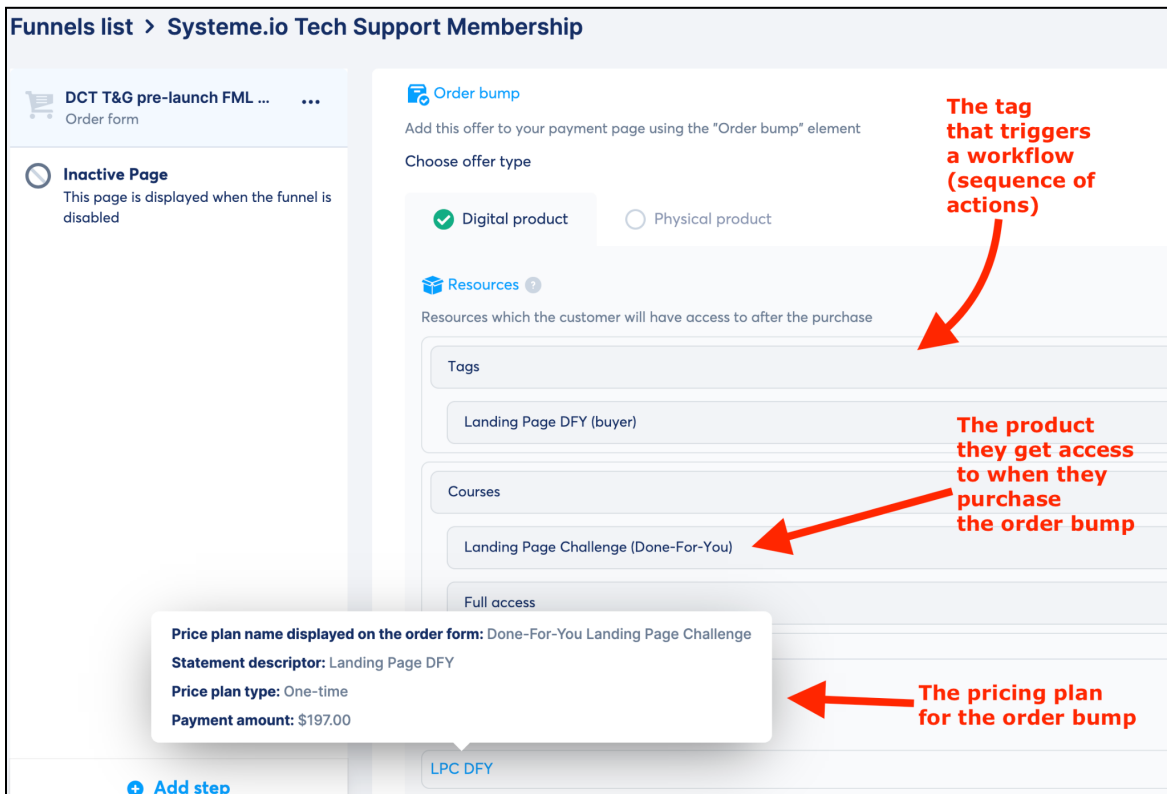
If you add more pricing plans, here is what it will look like:



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:

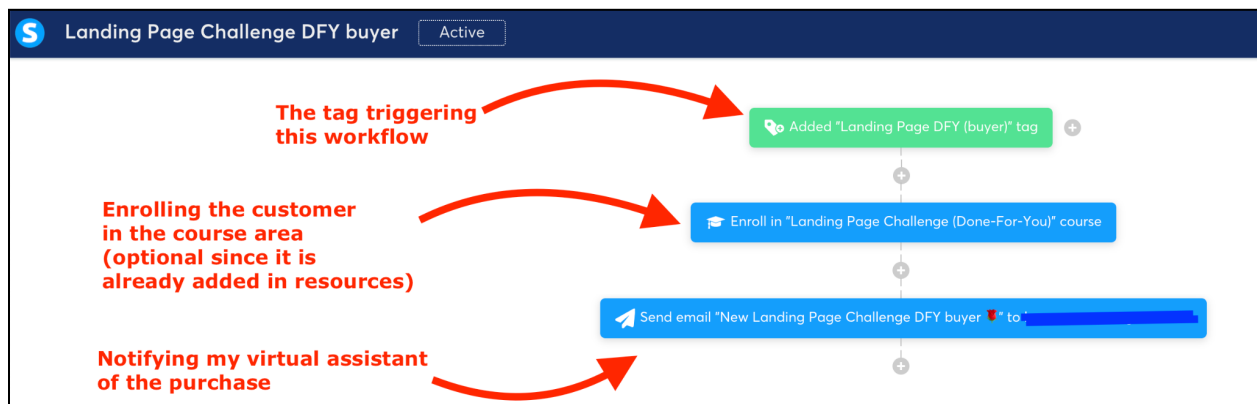


Now, if you wanted to trigger an email (or other sequence of actions) that goes out ONLY if someone bought from you the order bump, you would set up a tag for the order bump purchase.

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

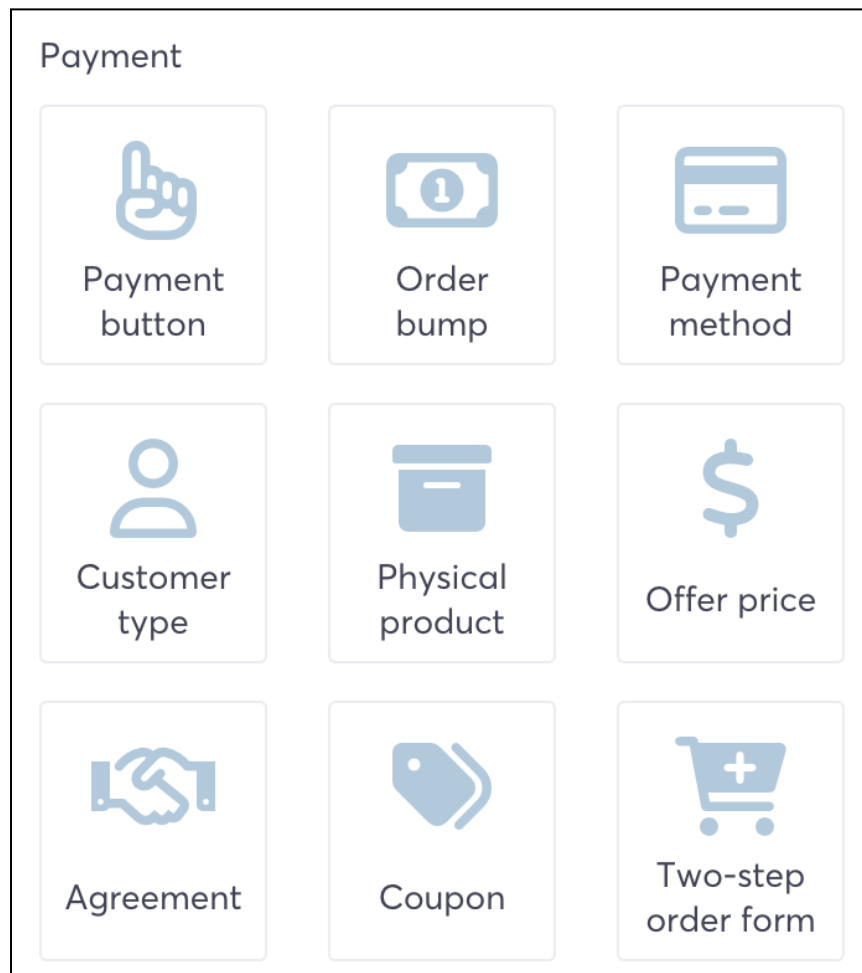
I have an email sequence template for cart abandonment and also an entire checklist on setting up the entire thing in my [Templates & Guides membership](#).

The screenshot shows the 'Templates & Guides Membership (DCT)' interface. On the left, there is a user profile for 'Eran Bucai' with a 'Previous' and 'Next' button, and a progress bar at 18%. Below this is a 'Welcome (start here)' section and a 'Templates' list with options like 'Searchable Template Library', '2023 (Monthly Template releases)', 'Email Sequence Templates from Drip Scripts', and 'Roadmap'. At the bottom left, there is a link for 'How to install Systeme.io templates'. The main content area features a search bar with 'cart' entered and a list of 'Content Type' filters: Systeme Templates, Zenler Templates, Canva Templates, Email Templates, Digital Guide, and High-quality blogs. A prominent green card displays 'CART ABANDONMENT EMAIL SEQUENCE' with a description: 'This Cart Abandonment email sequence is a request from one of the members and I am sharing the systeme version and a google doc version that you can use in your marketing and as inspiration for your own.' Below the card, it says 'Cart Abandonment Email Sequence' and 'This Cart Abandonment email sequence is a request from on...' with a 'Click to use' button.

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.

The screenshot displays a two-step checkout process. Step 1 is "CONTACT INFORMATION" and Step 2 is "CUSTOMER CHECKOUT".

Annotations with red arrows point to the following elements:

- Offer Price:** Points to the radio button for the "Monthly Subscription to Systeme.io Tech Support Membership" priced at "\$9.00 every month".
- Payment Method:** Points to the "Credit or debit card" option, which includes logos for VISA, MasterCard, AMERICAN EXPRESS, and DISCOVER.
- Coupon:** Points to the "Coupon" input field and the "Apply" button.
- Order bump:** Points to the yellow highlighted area containing the text: "Want the 'Thank You Page in a Day' course too? A complementary course that goes hand-in-hand with this one... Also, super short and to the point, easy to follow and implement. With a secret hack to turn your thank you page into a **lead-generating machine** and get even more traffic to your landing page! Grab it on this page for \$19 only by ticking the box above!".
- Payment button:** Points to the blue button labeled "Click here to buy" with the subtext "Get instant access to the courses and bonuses!".

At the bottom of the form, there is a small text: "* 100% Secure and Safe Payments *".

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.

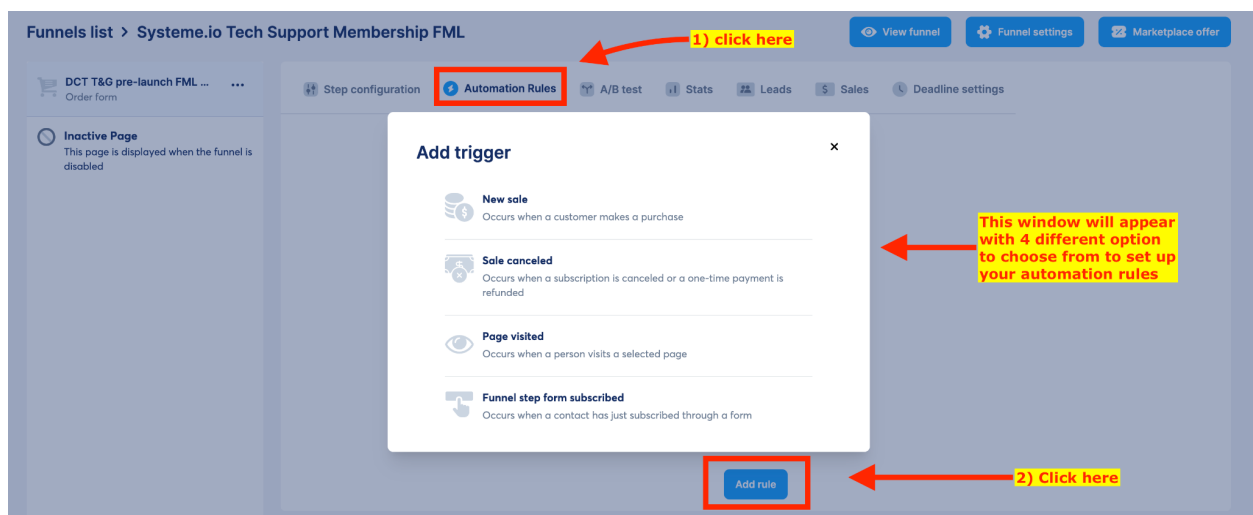
[Testimonials & Social Proof Workshop](#)

[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**”.

Add trigger

-  **New sale**
Occurs when a customer makes a purchase
-  **Sale canceled**
Occurs when a subscription is canceled or a one-time payment is refunded
-  **Page visited**
Occurs when a person visits a selected page
-  **Funnel step form subscribed**
Occurs when a contact has just subscribed through a form

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](#)

Add action



Subscribe to campaign

Subscribe a contact to a campaign



Unsubscribe from campaign

Unsubscribe a contact from a campaign



Add a tag

Add a tag to a contact



Remove tag

Remove a tag from a contact



Send email

Send an email to a contact



Send email to a specific email address

Send an email to a specific email address



Enroll in course

Enroll a contact in a course



Send webhook

HTTP request will be sent to a URL when an event happens in systeme.io



Grant access to a community

Allow a contact to join a community

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