AUTOMATION STARTER CHECKLIST

Turn your tools into 24/7 teammates.

What You'll Set Up (30–60 mins)

You're about to build the foundations of a system that quietly works for you — even when you're not at your desk. In the next few chapters, you'll learn how to organise your inbox, create smart links that actually tell you what's working, and set up simple automations that respond to people 24/7.

The goal isn't to overwhelm you with tech. It's to show you how to use the tools you already have in a smarter, more connected way. No new subscriptions, no coding, no complicated dashboards — just clean, practical workflows you can set up in under an hour.

What to Expect

Think of this as a one-hour transformation for your digital workspace.

By the end of this checklist, you'll have built five simple systems that compound quietly in the background:

- Inbox → Lead Tagging – Your inbox will automatically highlight the "money" emails that matter most.
- Smart Links (UTM-Ready) – You'll know exactly which posts, emails, or videos drive your results.
- 24/7 Auto-Replies – Your business will respond instantly with your guide, even while you sleep.
- Quick Tracking Sheet – You'll track performance in one simple view — no analytics degree required.
- Test Flow – You'll run a 5-minute check to make sure every part works seamlessly together.

You'll finish this checklist with a system that:

- **Saves time automatically.** The repetitive admin tasks start to take care of themselves.
- **Shows what truly works.** You'll have visibility on what converts, not just what looks good.
- **Keeps your audience engaged instantly.** Your systems deliver value in real-time.
- **Reduces mental clutter.** Clear tags, clean data, and instant replies free your focus for creativity.

TL;DR — Do This in 15 Minutes

The fastest path to “automation working” today.

Checklist:

- [ ] Create label: Gmail → Settings → Labels → Money
- [ ] Make a filter: Gmail search ▸ Has the words:

  invoice OR receipt OR subscription OR order OR payment OR "payment received" OR "order confirmed" OR refunded OR Stripe OR PayPal OR "your invoice" OR renewal

  Apply actions: Apply label: Money, Never send to Spam
- [ ] Make a smart link: Shorten your guide link (Bitly/Rebrandly).

  Example short link: bit.ly/afp-starter
- [ ] Auto-reply template: Gmail ▸ Templates (enable in Settings ▸ Advanced) ▸ create Guide Reply (see Inset 2).
- [ ] Test: Email yourself “GUIDE”, confirm instant reply + link click works.

Step 1 Inbox → Lead Tagging

If your inbox feels like a black hole, you're not alone. Between newsletters, updates, and client messages, it's easy to miss what actually matters — the emails that move money.

Why This Matters

Think about it: your inbox quietly tracks your entire business health. Payments, invoices, receipts, subscriptions, client orders — they all pass through there.

If you have to search for them or scroll endlessly, you lose time (and occasionally, money).
But when you teach your inbox what "money" looks like, it'll start working for you — like a smart filter that catches every important transaction before you even open your laptop.

The goal isn't to make you obsess over finances — it's to give you instant clarity. You'll always know where cash is moving without digging through noise.

How to Set It Up (5–10 Minutes)

1. Create a "Money" Label or Category
This label will collect every financial email automatically.

- In Gmail:
- Go to Settings → Labels → Create new label → Name it Money or Revenue.
- In Outlook:
- Go to Home → Categorize → All Categories → New Category → Name it "Money" and choose a bright colour.

This label/category will act like a "money radar" — the visual cue your brain instantly recognizes when something needs your attention.

2. Build the Filter or Rule
This is where the automation happens. You'll tell your inbox:
"Whenever an email mentions anything to do with payments, invoices, or receipts — tag it."

In Gmail

1. Click the ⚙️ icon → See all settings → Filters and Blocked Addresses → Create a new filter
2. In the **"Has the words"** field, paste this: invoice OR receipt OR subscription OR order OR payment OR "payment received" OR "order confirmed" OR refunded OR Stripe OR PayPal OR "your invoice" OR renewal

Inbox → Lead Tagging

Auto-highlight the emails that move money.

3. Click Create filter, then tick:
- Apply the label → Money
- Star it (optional, but helpful for scanning quickly)

4. Hit Create filter again to confirm.

In Outlook

1. Go to Settings → Mail → Rules → Add new rule.
2. Name your rule: Money Tag.
3. Condition: Subject or body includes any of these words:
4. invoice, receipt, subscription, order, payment.
5. Action: Add category → Money
6. (Optional): Mark as important or Move to folder → Money.

3. (Optional) Forward Automatically

If you track payments in a CRM, Google Sheet, or bookkeeping app, you can automatically forward "money emails" there.

In Gmail:

- Settings → Forwarding → Add forwarding address → your CRM's email (or +money alias).
- Then, edit your filter to include "Forward to [email]".

It's completely optional — but it's one of those little touches that compounds your data tracking later on.

Pro Tips

- **Start broad, refine later.**

Don't over-filter right away. Let your inbox collect a few days' worth of "money" emails, then review them. If you see junk slipping in, remove or adjust keywords.

- **Add vendor names over time.**

Once you see regular senders (e.g., Stripe, PayPal, Shopify, Xero, GoCardless), add them to your keyword list.

- **Check your label once a day.**

Make it a ritual: open your Money label during your morning check-in. Action what needs it, then close it. No doom-scrolling through the rest of your inbox.

- **Combine with Step 4 (Tracking Sheet)**

Later in this guide, you'll log key metrics from these emails — payments, subscriptions, renewals — so everything connects.

Step 2 Smart Links (UTM-Ready)

You've already started organising your inbox to catch the money.
Now it's time to discover where the money begins — which posts, emails, or platforms actually lead people to you.

This is where smart links come in.
They're not just normal URLs — they're your quiet detectives, showing you which content, channel, or campaign drives results.

Importance of Smart Links

Every time you share your guide, service, or product link, you create a tiny digital breadcrumb trail.
But without tracking, all the breadcrumbs blend together — and you lose insight into what's actually working.

Smart links fix that.
They use something called UTM parameters (short for Urchin Tracking Module — weird name, simple purpose) to label each link with where it came from.

In plain English:
"A UTM tells your analytics tools who clicked what, where, and why."

The 3-Step Setup (10–15 mins total)

1. Create a Clean Naming System

You'll use a simple three-part format:
"offer-channel-hook"

Examples:

- mhm-yt-reset → Money Habits Method / YouTube / Reset video
- afp-ig-bio → Automate for Profit / Instagram / Bio link
- mhm-li-car1 → Money Habits Method / LinkedIn / Carousel 1

2. Build Your First UTM Links

Here's your base template. You'll just swap out the bits that change:

?utm_source=SOURCE&utm_medium=MEDIUM&utm_campaign=CAMPAIGN

Step 2 Smart Links (UTM-Ready)

Example for YouTube:
?utm_source=yt&utm_medium=video&utm_campaign=mhm_reset

Example for Instagram Story:
?utm_source=ig&utm_medium=story&utm_campaign=afp_starter

Combine your base website or opt-in URL with the UTM:
https://digitalbrandsllc.systeme.io/digitalbrands?utm_source=ig&utm_medium=bio&utm_campaign=afp_starter

3. Shorten and Store Your Links

Long UTMs look messy in posts, so shorten them with a free tool.

Options:
- Bitly (bit.ly)
- Rebrandly
- TinyURL
- Or create redirects on your own website (best for branding).

Label each link clearly — e.g. MHM IG Bio, AFP Email, MHM YT Reset.

Keep them all in one small sheet or document (you'll add this to your Tracking Sheet in Step 4).

How to Read Your Results

After a few days or weeks, head to your analytics tool (Google Analytics, email platform, or your link shortener dashboard).
Look at where your clicks and conversions came from.

You'll start to notice patterns:
- Maybe YouTube descriptions drive the most clicks.
- Maybe Instagram stories bring more opt-ins than your bio.
- Maybe email links close actual sales.

When you know what works, you can stop guessing — and start doubling down where it counts.

UTM Builder

Track What Works (UTMs that are simple & consistent)

Base URL (example):
https://digitalbrandsllc.systeme.io/afp-guide

Copy one of these and swap only the values in bold:

• Instagram bio:
?
utm_source=instagram&utm_medium=bio&utm_campaign=afp_starter&utm_content=profile_link

• TikTok bio:
?
utm_source=tiktok&utm_medium=bio&utm_campaign=afp_starter&utm_content=profile_link

• YouTube Shorts description:
?
utm_source=youtube&utm_medium=description&utm_campaign=afp_starter&utm_content=short_guide

• Facebook Reels caption:
?
utm_source=facebook&utm_medium=reels&utm_campaign=afp_starter&utm_content=reel_variant_a

Pro tip:

Shorten each to a branded short link (Bitly/Rebrandly) and reuse the same campaign name (afp_starter) across posts.

Step 3 24/7 Auto-Replies

By now, your inbox is tagging money emails and your links are tracking clicks.
But what happens when someone messages you at midnight asking for your free guide, or emails you while you're deep in focus work?

If they have to wait until you're back online, you lose momentum — and possibly that lead.
This step fixes that with one of the simplest but most powerful automations you'll ever use: auto-replies.

Why You Need 24/7 Auto-Replies

Attention spans are short. When someone shows interest, you have a window of just a few minutes before they move on.

A quick response builds trust instantly. It shows that you're organized, reliable, and ready to help.
And when your auto-reply includes your free guide link, you're not just replying fast — you're delivering instant value.

You're turning curiosity into connection.

Even better, once you've written your reply once, it keeps working for you forever. Every new message triggers it automatically — while you rest, travel, or focus on something else.

How to Set It Up (10–15 Minutes)

1. Auto-Replies in Instagram and Facebook DMs

Goal: When someone sends you a message with a keyword (like "GUIDE"), your system replies instantly with the download link.

Steps:
1. Go to your Meta Business Inbox or Facebook Page → Inbox.
2. Find Automated Responses (or "Instant Reply" on mobile).
3. Choose Create Automation → Keyword Response.
4. Add your trigger word — for example: GUIDE or CHECKLIST.
5. In the message box, paste your response:
   "Got it! Here's your free guide: [insert your smart link].
   Want the fast-track version? Reply FAST and I'll send you the 30-minute set-up."
6. Save and test it by messaging your page the word "GUIDE."

Step 3 24/7 Auto-Replies

2. Auto-Replies in Email

Goal: When someone emails you — especially about your free guide or enquiry — they get a warm, instant confirmation and the guide link.

Steps for Gmail:

1. Settings → Advanced → enable "Templates" → create template → Filter → "Has words: GUIDE OR CHECKLIST" → "Send template: Guide" so only guide requests trigger it.
2. Scroll to Vacation Responder.
3. Turn it ON.
4. Write your subject and message:

Subject: Got your message — here's your guide inside

Message:
"Thanks for reaching out — quick heads-up, I've received your message.
Here's the free guide you asked for: [insert your smart link].

If you want the fast-track set-up, reply FAST and I'll send you the 30-minute version."

5. Tick Send only during this period if you want it active for a campaign window, or leave it open-ended.

Steps for Outlook:

1. Go to File → Automatic Replies (Out of Office).
2. Select "Send automatic replies."
3. Copy and paste the same message above.
4. Optional: choose a time range or leave it on permanently.

3. Keep Your Messaging Consistent

Your tone should sound like you — friendly, confident, and direct.

A few quick tips:

- Be clear and helpful. Get to the point and include the guide link right away.
- Use one CTA. If they can download the guide or reply "FAST" for more help, that's enough.
- Avoid robotic phrases. Say "Got it!" instead of "We have received your enquiry."
- End with warmth. "Speak soon" or "Enjoy the guide" makes a difference.

Gmail Auto-Reply (Templates + Filter)

The Right Way to Auto-Reply Your Guide (No Mass Vacation Reply)

Step-by-step

1. Enable Templates: Gmail ▸ ⚙ Settings ▸ See all settings ▸ Advanced ▸ Enable "Templates."

2. Create the template: Compose → write reply → ⋮ Templates → Save draft as template → Save as… "Guide Reply."

3. Make the trigger filter: Gmail search ▸ Has the words: GUIDE OR CHECKLIST → Create filter → Send template: Guide Reply, Don't send to Spam.

4. Test: From another email, send "GUIDE" — you should get the reply within seconds.

Subject: Your Automation Starter Checklist

Body:
Hi there — here's your free Automation Starter Checklist.
Download: bit.ly/afp-starter

Next steps:
• Save this email so you can find the link later.
• Reply HELP if you want me to send a 5-minute setup video.

— Automate for Profit

Tiny tips:

• Use GUIDE or CHECKLIST in comments/DM flows to match this filter.
• If replies hit Promotions, send 2 follow-ups over 48h (Systeme automation).

Step 4 Quick Tracking Sheet

You've built your first set of automations:

- Your inbox tags the "money" emails.
- Your links track exactly where clicks come from.
- Your auto-replies deliver value instantly.

Now comes the part that ties it all together — tracking.

This step takes just a few minutes, but it gives you a superpower: clarity.
You'll know which post, story, or channel brings the most clicks, and which ones quietly waste your time.

Attention spans are short. When someone shows interest, you have a window of just a few minutes before they move on.

A quick response builds trust instantly. It shows that you're organised, reliable, and ready to help.
And when your auto-reply includes your free guide link, you're not just replying fast — you're delivering instant value.

The Importance of Tracking

Every link you share, every email you send, every post you publish — it's all a small experiment.
Tracking helps you spot which experiments succeed.

Your Quick Tracking Sheet becomes your control room.
It's the one place where you can see, at a glance:

- What content you posted
- Where you shared it
- How many people clicked or opted in
- And what's worth repeating

In 10 minutes, you'll have a live system that turns data into decisions.

What You'll Need

- A Google Sheet, Excel, or Notion table (whatever you prefer)
- Your smart links from Step 2
- 10 minutes to set it up

You'll use this every few days to check what's happening.

Step 4 Quick Tracking Sheet

Step-by-Step Setup (10 Minutes)

1. Create Your Columns

Open your spreadsheet and label your columns like this:

Date	Channel	Post/Hook	Smart Link	Clicks	Opt-Ins	Conversion Rates

Here's what each one means:

- **Date:** When you posted or sent the content.
- **Channel:** Where it went (IG, YT, Email, LinkedIn, etc.).
- **Post / Hook:** A short title or keyword that helps you remember the content ("7-day reset story", "Inbox hack email", etc.).
- **Smart Link:** The exact link you used — so you can trace results back later.
- **Clicks:** Number of times the link was clicked.
- **Opt-ins:** How many people actually signed up or downloaded your guide.
- **Conversion Rate:** Simple calculation — Opt-ins ÷ Clicks × 100.
- **Notes:** Anything interesting you observed (time of day, type of image, audience reaction).

2. Add Your First Entries

Start with two or three of your recent posts.

Date	Channel	Post / Hook	Smart Link	Clicks	Opt-ins	Conversion Rate
21 Oct	Instagram Story	"Free Guide CTA"	mhm-ig-story	52	18	34%
22 Oct	YouTube Video	"Money Reset"	mhm-yt-reset	78	20	26%
24 Oct	Email	"Your Guide Inside"	afp-email-nl	40	25	62%

Step 4 Quick Tracking Sheet

3. Update Regularly (5 Minutes Every 2 Days)

Open the sheet every 24–48 hours and add new results.

You can pull click data straight from:

- Bitly/Rebrandly dashboard (for short-link clicks)
- Your email tool (for opens and link clicks)
- Google Analytics (if you've added UTMs)

Over time, patterns emerge:

- Which platforms bring the most traffic
- Which content types convert best
- Which CTAs fall flat

4. Use Conditional Formatting (Optional)

If you like visuals, colour-code your sheet:

- Green for conversion rates above 40%
- Yellow for 20–40%
- Red for below 20%

Name Things Like This

• Gmail label: Money
• Template name: Guide Reply
• UTM campaign: afp_starter
• Keyword (DM/Comments): GUIDE
• Sheet tab: Tracking

Pro Tips

- **Add one metric at a time.**

Don't overcomplicate it. Start with Clicks and Opt-ins. Add revenue later if you want.

- **Batch updates.**

Instead of checking daily, update twice a week. You'll save time and see clearer trends.

- **Pair with your Money Label.**

When a new payment or client email appears under Money, log it as a "Result" in your sheet's Notes column.

- **Review Weekly.**

Every Friday, ask: What performed best this week? Then plan your next post or email based on those numbers.

Step 5 Test Flow

The final check before you flip the “autopilot” switch.

You’ve built the foundations:

- Your inbox tags “money” messages.
- Your links track clicks and conversions.
- Your auto-replies send your guide instantly.
- Your tracking sheet captures performance.

Now it’s time for the moment of truth — testing the entire system as if you were your own customer.

Your 5-Minute Test Routine

Step 1 — Test the Inbox Filter

1. Send yourself an email with one of your trigger keywords in the subject line (e.g. “Invoice from Client” or “Subscription renewal”).
2. Wait a few seconds, then open your inbox.
3. Check:
   - Did your Money label appear automatically?
   - Was the email starred or categorized as expected?
   - If you added auto-forwarding, did the copy land in your CRM or Google Sheet?

Step 2 — Test the Smart Link

1. Open your phone or browser in incognito mode.
2. Click one of your shortened smart links (from Step 2).
3. Check:
   - Does it take you to the correct destination page (your guide or opt-in)?
   - In your link tracker (e.g. Bitly), did it register a click?
   - If you used UTMs, do you see the traffic appearing in your analytics tool after a few minutes?

Step 3 — Test the Auto-Reply

1. Go to your business Instagram or Facebook page.
2. Send a DM with your trigger keyword (e.g. “GUIDE”).
3. Within seconds, you should receive your automated message with the guide link.
   - Test the link inside the message to confirm it opens correctly.

4. If you set up an email auto-reply, send yourself a message from a different account.
   - Check if the confirmation email and guide link arrive instantly in your inbox.

Step 5 Test Flow

Step 4 — Test the Opt-In + Tag

1. Go to your actual opt-in page.
2. Enter your email address and download the guide (pretend you're a new subscriber).
3. Check inside your email platform or CRM:
    - Was your contact tagged or labelled correctly?
    - Did the welcome or guide email send automatically?

Step 5 — Log the Test in Your Tracking Sheet

Finally, record your test in your Quick Tracking Sheet.

It's a good habit to treat every experiment — even your tests — as real data.

Date	Channel	Post/Hook	Smart Link	Clicks	Opt-Ins	Conversion Rates
25 Oct	Self Test	System Check	afp-test	1	1	100%

Troubleshooting Checklist

If something didn't work perfectly, don't panic. Here's how to quickly fix it:

- **No tag applied?**

Recheck your email filter keywords or make sure the rule is active.

- **Auto-reply didn't send?**

Ensure the automation or vacation responder is enabled, not saved as a draft.

- **Link not tracking clicks?**

You may be using the raw link instead of your shortened one. Replace it with your smart link.

- **Opt-in not tagged?**

Double-check your form's settings — most email tools have a "Tag contacts who sign up via this form" option.

- **Guide not delivered?**

Confirm the link in your auto-reply points to the correct file or landing page.

Bonus Tiny Wins You'll Actually Use

Small tweaks. Big time-savers.

You've built your starter system — inbox tagging, smart links, auto-replies, and tracking.
Now let's add a few tiny automations that make it feel effortless.
These take minutes to set up but save hours each month.

1. Auto-Save Invoices and Receipts (5 mins)

How to do it:

- Create a folder in Google Drive or Dropbox called "Money Files."
- In Gmail, create a filter:
  "has:attachment (invoice OR receipt)"
- Apply your Money label and choose Forward to your storage integration (Zapier/Make) or download automatically once a week.

2. Weekly Reset Reminder (2 mins)

Automation runs best when you check in briefly.

Set a repeating calendar reminder:

- Every Friday, 10 mins: Update tracking sheet + test your "GUIDE" auto-reply.

This quick reset keeps your systems sharp without micromanaging them.

3. "FAST" Quick Reply (3 mins)

When someone replies FAST, they're hot leads.

Save this response as a template or quick reply:

> Hey! Thanks for moving fast!
> Here's your next-step link: [insert link].
> It walks you through connecting all your automations in under 30 minutes.

4. Optional: Connect with Zapier or Make (Later Upgrade)

Once you're comfortable, tools like Zapier or Make can connect everything automatically:

- Save new Money emails to Google Sheets.
- Add new opt-ins to your CRM with a "Guide Download" tag.
- Send booking links when someone replies FAST.

15-Minute QA

End-of-Guide Checklist:

- [ ] Comment/DM GUIDE on one post → receive auto-reply with link
- [ ] Click the smart link → confirm the URL contains your UTMs
- [ ] Opt-in form submits → lands on Thank-You page
- [ ] GA4 shows generate_lead for that visit (DebugView)
- [ ] Meta Test Events shows PageView + Lead (no duplicates)