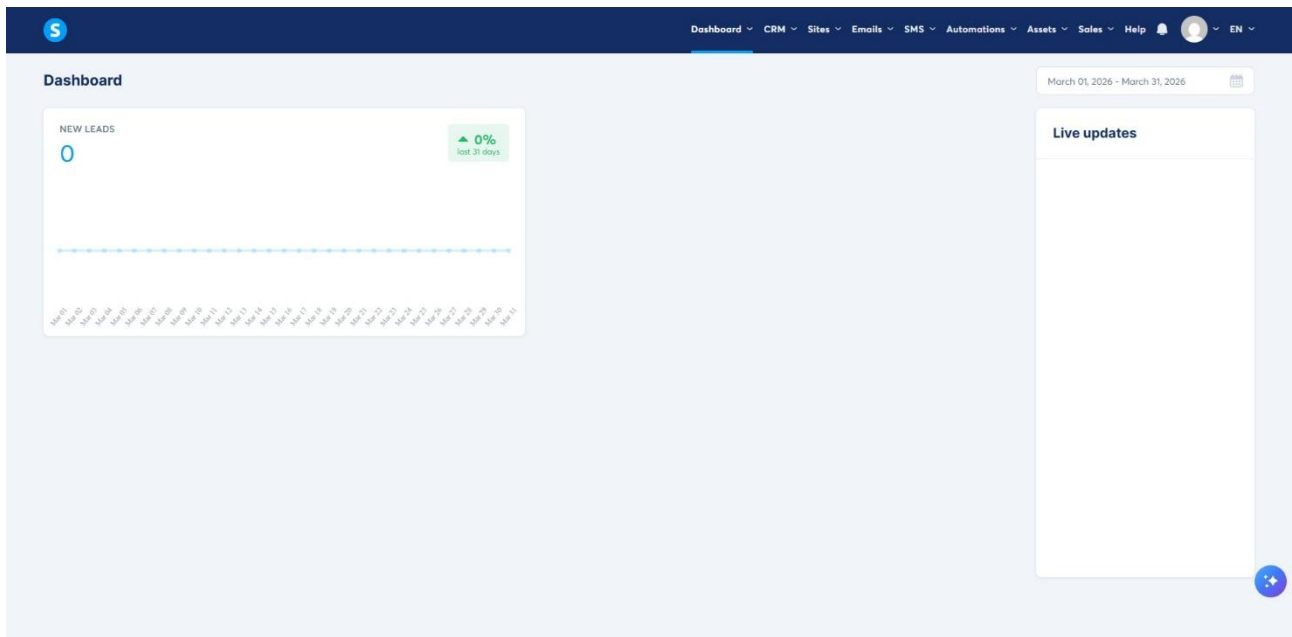


# Systeme.io Dashboard Cheat Sheet (Beginner Edition)



## What this guide is for

If you just opened Systeme.io and felt overwhelmed... this is for you.

This cheat sheet gives you a **clear, no-fluff overview** of the main sections, so you instantly understand:

- What each part does
- When you actually need it
- How to use it in real life

Keep this as a quick reference while building your first funnel.

## CRM

### Contacts

- **What it does:** Stores all your leads and customers.
- **When to use it:** Every time someone subscribes or buys.
- **Example:** View all users who signed up for your free guide.
- **Quick tip:** Regularly clean or organize contacts to stay efficient.

### Tags

- **What it does:** Labels to organize and segment contacts.
- **When to use it:** When you want to group users by behavior or interest.
- **Example:** Tag users as “Lead”, “Customer”, or “Interested in Funnels”.
- **Quick tip:** Keep tag names simple and consistent.

### Pipelines

- **What it does:** Tracks leads through different stages (like a sales flow).
- **When to use it:** When managing leads manually (calls, deals, etc.).
- **Example:** Move a lead from “New” → “Contacted” → “Closed”.
- **Quick tip:** Only use pipelines if you actually need manual tracking.

### Calendar

- **What it does:** Lets people book appointments with you.
- **When to use it:** For calls, coaching, or consultations.
- **Example:** Add a booking link inside your funnel.
- **Quick tip:** Connect it with reminders (email or SMS) to reduce no-shows.

## SITES

### Websites

- **What it does:** Build a traditional multi-page website.
- **When to use it:** When you need a full brand presence.
- **Example:** Homepage, About, Contact pages.
- **Quick tip:** Beginners can skip this and start with funnels.

### Sales Funnels

- **What it does:** Create step-by-step page flows for conversions.
- **When to use it:** For collecting leads or selling products.
- **Example:** Opt-in → Thank You → Offer page.
- **Quick tip:** Start with a simple 2-step funnel.

### Creator Stores

- **What it does:** A simple storefront to showcase products.
- **When to use it:** When selling multiple products in one place.
- **Example:** A page listing all your digital products.
- **Quick tip:** Use this only after you have multiple offers.

### Blogs

- **What it does:** Create SEO-friendly blog content.
- **When to use it:** To attract free organic traffic.
- **Example:** Write an article and link to your funnel.
- **Quick tip:** Focus on one niche to grow faster.

## EMAILS

### Newsletters

- **What it does:** Send one-time emails to your list.
- **When to use it:** Announcements, updates, or promotions.
- **Example:** Weekly email with tips or offers.
- **Quick tip:** Keep emails simple and personal.

### Campaigns

- **What it does:** Automated email sequences.
- **When to use it:** When someone subscribes or buys.
- **Example:** 5-email welcome sequence.
- **Quick tip:** Start with 3–5 emails, not 20.

### Statistics

- **What it does:** Tracks performance (opens, clicks, etc.).
- **When to use it:** To improve your emails over time.
- **Example:** Check which email gets the most clicks.
- **Quick tip:** Focus on click rate, not just opens.

## SMS

### SMS Templates

- **What it does:** Create reusable text messages.
- **When to use it:** Quick alerts or reminders.
- **Example:** “Your call starts in 1 hour.”
- **Quick tip:** Keep messages short and clear.

### Statistics

- **What it does:** Tracks SMS performance.
- **When to use it:** To measure delivery and engagement.
- **Example:** Check how many users received your message.
- **Quick tip:** Use SMS only for high-priority communication.

## AUTOMATIONS

### Rules

- **What it does:** Simple trigger-action automations.
- **When to use it:** Basic tasks.
- **Example:** If user subscribes → add tag.
- **Quick tip:** Start with 1 trigger + 1 action.

### Workflows

- **What it does:** Advanced multi-step automations.
- **When to use it:** More complex funnels.
- **Example:** Subscribe → send emails → wait → pitch product.
- **Quick tip:** Don't overcomplicate early on.

## ASSETS

### Physical Products

- **What it does:** Manage physical goods.
- **When to use it:** If you sell shipped products.
- **Example:** Add a product with price and shipping.
- **Quick tip:** Skip this if you only sell digital products.

### Coupons

- **What it does:** Create discount codes.
- **When to use it:** Promotions or launches.
- **Example:** “LAUNCH20” for 20% off.
- **Quick tip:** Use limited-time offers to increase urgency.

### Courses

- **What it does:** Build and host online courses.
- **When to use it:** Selling knowledge or training.
- **Example:** Modules with video lessons.
- **Quick tip:** Start with a simple structure.

### Communities

- **What it does:** Create private member areas.
- **When to use it:** For groups or memberships.
- **Example:** Paid community access.
- **Quick tip:** Add value consistently to keep members engaged.

### Files

- **What it does:** Store downloadable content.
- **When to use it:** Lead magnets or resources.

- **Example:** Upload your PDF guide.
- **Quick tip:** Organize files clearly from the start.

## SALES

### Orders

- **What it does:** Shows all customer purchases.
- **When to use it:** Track what people buy.
- **Example:** See who bought your course.
- **Quick tip:** Check this regularly after launching.

### Transactions

- **What it does:** Displays payment details.
- **When to use it:** Financial tracking.
- **Example:** Monitor completed or failed payments.
- **Quick tip:** Investigate failed payments quickly.

### Subscriptions

- **What it does:** Tracks recurring payments.
- **When to use it:** Memberships or monthly offers.
- **Example:** Active subscribers list.
- **Quick tip:** Monitor churn (cancellations).

### Affiliate Invoices

- **What it does:** Manages affiliate payouts.
- **When to use it:** If others promote your products.
- **Example:** Pay commissions to partners.
- **Quick tip:** Only set this up when you start scaling.

## SETTINGS

- **What it does:** Controls your account setup and integrations.
- **When to use it:** At the beginning and before launching.
- **Example:** Connect Stripe/PayPal, set sender email, add domain.
- **Quick tip:** Complete this before sending traffic or selling.

## Simple Beginner Workflow

1. Create a funnel (Sales Funnels)
2. Collect leads (Contacts + Tags)
3. Send emails (Campaigns)
4. Automate actions (Rules)
5. (Optional) Sell a product (Courses / Products)

## Final Tip

Most beginners fail because they try to use **everything at once**.

Instead:

- Start with **Funnels + Emails + Contacts**
- Add Automation and Products only when needed

Simple = faster results.