

BUSINESS IN A BOX

BUILD THE FUNNEL CHECKOUT & EMAIL SYSTEM

Turn the approved offer into a working customer journey
that collects, sells, delivers, and follows up.

SYSTEME.IO • PAGES • PAYMENT • DELIVERY • EMAIL • TESTING

Build it once. Test every path. Make the next step obvious.

Created by Mr. Mike

This Guide Builds the Machine That Delivers the Offer

Guide 05 approved what you sell. Guide 06 turns that approved Offer Brief into a complete, tested customer path.

This is where your product stops being a file on your computer and becomes a functioning business asset. A visitor must be able to understand the offer, decide, pay securely, receive the correct files, get useful emails, decline an optional add-on without punishment, and contact you when something goes wrong.

YOUR FINISH LINE: One live and tested Systeme.io funnel with the correct pages, payment connection, product delivery, optional CSI one-time offer, email campaign, automation, mobile design, policies, and a Final Funnel Record.

What you will build

- A dedicated Funnel Studio conversation that uses the exact Guide 05 Offer Brief.
- A simple page map before touching the Systeme.io editor.
- An optional opt-in path for a free guide and a direct sales path for ready buyers.
- A sales page, order form, optional CSI offer, and sales thank-you page.
- A delivery system that works even when the buyer closes the browser.
- A welcome and customer-use email sequence.
- Tags and automations that identify leads, buyers, and CSI customers.
- An optional custom domain, branded support email, authenticated sender, and secure root-domain redirect.
- Basic policy, support, sender, payment, and account settings.
- A full desktop and mobile test across every yes, no, payment, and delivery path.
- A Final Funnel Record another ChatGPT conversation can understand later.

DO NOT BUILD WHILE INVENTING. Every headline, price, promise, deliverable, limitation, and CTA must come from the approved Offer Brief or be marked for review.

REQUIRED INPUTS

Open the Approved Files Before You Build

The funnel is an implementation project, not another brainstorming round. Bring forward the final decisions and customer files so every page describes the same product.

Open these items

1. FINAL_Offer_Brief_[Product_Name]_[Date] from 07 - SALES AND CONTENT.
2. FINAL_Product_Handoff_[Product_Name]_[Date] from 04 - FINAL PRODUCT.
3. Every final customer file from 04 - FINAL PRODUCT.
4. The approved short, medium, and long message bank from Guide 05.
5. Your approved price, currency, billing type, access, support, and refund decisions.
6. Your approved proof, FAQs, prerequisites, limitations, and buyer responsibilities.
7. The CSI Companion Offer Brief if you are building the optional one-time offer.
8. A support email address and a sender email address you can access.
9. Your Systeme.io account and the payment account you intend to connect.

Pre-build audit prompt

Audit the Offer Brief, Product Handoff, and customer files I provide. Create a BUILD INPUTS table with APPROVED, MISSING, CONFLICT, VERIFY, and NOT NEEDED columns. Check product name, price, currency, deliverables, file names, access, CTA, proof, policies, support, prerequisites, and CSI terms. Do not write pages or guess missing information. End with FUNNEL INPUTS READY or FUNNEL INPUTS NOT READY.

STOP ON CONFLICTS. A checkout that says \$29 and a sales page that says \$39 is not a small typo. It is a broken buying decision.

Open the Fifth Dedicated Business Chat

A computer is strongly recommended for this guide. You can review copy on a phone, but page building, payment setup, file handling, domain work, and side-by-side testing are safer on a larger screen.

Start a fresh ChatGPT conversation and rename it:

05 - FUNNEL STUDIO - [SHORT PRODUCT NAME]

The connected workspace now contains

1. 01 - Business Command Center: Stable business foundation and boundaries.
2. 02 - Product Research and Validation: Evidence, demand, and approved Product Brief.
3. 03 - Product Studio: Finished product files and Product Handoff.
4. 04 - Offer Studio: Positioning, price, proof, and approved Offer Brief.
5. 05 - Funnel Studio: Pages, checkout, delivery, email, testing, and launch record.

Keep this chat focused

- Do not rewrite the product or change the price without returning to the Offer Studio.
- Do not create daily social content in this chat.
- Do not paste passwords, card numbers, API secrets, tax IDs, or customer data.
- Do not ask ChatGPT to click Publish without you reviewing the finished page.
- Do not rely on memory when a setting can be checked in the current interface.

PASTE THE OFFER CONTEXT CAPSULE FIRST. Then paste the full Offer Brief and Product Handoff only when the new chat confirms what it needs.

Set Up the Funnel Studio

FUNNEL STUDIO SETUP PROMPT

Act as my beginner-friendly funnel architect, Systeme.io implementation guide, conversion copy editor, email automation planner, and quality-control tester. Build one complete customer journey from my approved Offer Brief and Product Handoff.

SOURCE PRIORITY: approved Offer Brief; final Product Handoff; actual customer files; approved policies; verified current platform documentation. Never replace an approved decision silently.

PROCESS: Work in stages: input audit, funnel map, account readiness, domain and branded-email setup when used, sender and payment setup, assets, page copy, opt-in path if used, sales page, checkout, optional companion offer, thank-you page, delivery, tags, campaign, automation, policies, analytics, test matrix, launch, and Final Funnel Record. Ask one question at a time and wait for approval between stages.

INSTRUCTIONS: Give exact click-path guidance only when verified against the current interface. If a label may have changed, say VERIFY IN CURRENT INTERFACE. Separate COPY TO PASTE from ACTION TO TAKE. Keep every page mobile-first and every button destination explicit.

TRUTH AND SAFETY: Never invent proof, urgency, scarcity, platform rules, legal compliance, customer data, results, DNS records, or verification targets. Never request passwords, payment credentials, tax IDs, or private customer information. Mark unknowns [VERIFY], missing owner decisions [CREATOR INPUT], policy questions [REVIEW], and tests [TEST].

QUALITY: The main offer must remain complete if the CSI add-on is declined. Every customer must have a recoverable delivery path. Do not call the funnel finished until every domain, yes, no, payment, email, download, mobile, refund, and support path has been tested.

First summarize the product, offer, page path, domain plan, payment, delivery, email, policies, optional CSI offer, and unresolved decisions. End with READY TO MAP or NOT READY.

Approve setup only when

- The AI repeats the correct product, price, files, buyer, and promise.
- The page sequence is still a proposal, not assumed implementation.
- The optional offer is clearly separate from the main purchase.
- Missing information remains labeled instead of fabricated.
- The testing requirement is visible from the beginning.

CHATGPT HELPS YOU BUILD AND CHECK. You remain responsible for every account setting, claim, policy, payment connection, and Publish click.

Draw the Funnel Before You Touch the Editor

A funnel is a sequence of decisions. Mapping it first prevents random pages, dead buttons, duplicate emails, and customers landing in the wrong place.

Recommended core path

1. Traffic source: TikTok, YouTube, email, or another approved channel.
2. Entry: Free-guide opt-in or direct sales page.
3. Education: Helpful emails and/or the main sales page.
4. Decision: Main-product order form.
5. Optional offer: CSI one-time offer at the genuine checkout-session price.
6. Completion: Sales thank-you page with next steps.
7. Recovery: Delivery email, support contact, and purchase record.
8. Follow-up: Customer-use campaign and relevant future messages.

Required branches

- Opted in but did not buy.
- Bought the main offer and accepted CSI.
- Bought the main offer and declined CSI.
- Payment failed or was abandoned.
- Email arrived but the link failed.
- Buyer requests support or a refund.

Mapping prompt

Create a plain-language funnel map using my approved offer. For every step list VISITOR STATE, PAGE OR EMAIL, REQUIRED ACTION, BUTTON DESTINATION, TAG CHANGE, DELIVERY, FAILURE PATH, and SUCCESS CONDITION. Include accepted and declined CSI branches. Do not write page copy yet. Flag any branch that does not have a destination.

IF A BUTTON HAS NO DOCUMENTED DESTINATION, IT IS NOT READY. “I will connect it later” is how funnels launch broken.

Start With the Smallest Complete Funnel

More steps do not automatically produce more sales. A first funnel should be complete enough to serve the buyer and simple enough that you can test every path.

Option A - direct sale

- Sales page.
- Order form.
- Optional CSI one-time offer.
- Sales thank-you page.
- Purchase delivery and customer emails.

Option B - free guide plus sale

- Opt-in page for the free monetization guide.
- Opt-in thank-you or bonus-delivery page.
- Lead welcome campaign.
- Sales page and order form.
- Optional CSI one-time offer.
- Sales thank-you page and customer delivery.

Use Option B when

- The free guide is already finished and genuinely useful.
- You want to build an email list before asking for the purchase.
- Your traffic needs education before the offer makes sense.
- You can maintain a useful lead campaign without spamming people.

Use Option A when

- The buyer already understands the problem and solution.
- The free guide delays a clear purchase decision.
- You need the fewest moving pieces for the first launch.

FOR THIS BUSINESS, THE PLANNED BUILD IS OPTION B: FREE GUIDE FIRST, THEN THE BUSINESS IN A BOX OFFER, WITH CSI AS AN OPTIONAL CHECKOUT-SESSION OFFER.

Design for the Account You Actually Have

Last reviewed October 17, 2026: Systeme.io lists a permanent Free plan with limits including 2,000 contacts, 3 sales funnels, 1 email campaign, 1 automation rule, and 1 course. It also advertises unlimited email sends and 0% platform transaction fees, while connected payment processors may charge their own fees. Verify the current pricing page before publishing.

Why the limits matter

- A lead campaign and customer campaign may require planning around campaign limits.
- Several small funnels can consume the funnel allowance faster than one organized funnel.
- An automation limit can change whether you use one carefully designed rule or upgrade.
- Contact limits affect when a paid plan becomes necessary.
- A free plan is not a promise that every future feature remains free.

Free-plan decision worksheet

1. Count the funnels already inside the account.
2. Count active contacts, campaigns, rules, workflows, courses, and custom domains.
3. List the exact resources this product requires.
4. Compare those needs with the live pricing table.
5. Record what must change before the account reaches a limit.
6. Do not upgrade merely because a tutorial recommends it.

Capacity prompt

Using the current Systeme.io pricing page and the funnel map, create a PLAN CAPACITY CHECK. Compare current usage, required new resources, remaining capacity, upgrade triggers, and non-Systeme.io costs. Cite the current official page and date checked. Do not assume old plan limits remain accurate.

BUILDING ON FREE IS FINE. BUILDING WITHOUT KNOWING THE LIMITS IS NOT. Keep the funnel portable and document every paid dependency.

Secure the Workspace Before Adding Customers

Your funnel will contain customer contact details, product access, payment records, and business settings. Treat the account like business infrastructure, not a disposable app login.

Complete this foundation

1. Use an email address you control and can recover.
2. Create a unique strong password and use available account security controls.
3. Confirm account language, timezone, business name, and default currency.
4. Add the support email customers should use.
5. Review notification settings for sales, failed payments, and support.
6. Do not share the owner login with contractors; use supported access options when needed.
7. Record account ownership and recovery information securely outside ChatGPT.
8. Review existing funnels, tags, campaigns, and automations before creating duplicates.

Information ChatGPT should never receive

- Passwords, recovery codes, private keys, or API secrets.
- Complete card or bank information.
- Tax identification numbers or identity documents.
- Raw exports of customer names, emails, purchases, or support messages.
- Private Stripe or PayPal account information.

Account audit prompt

Give me a click-by-click ACCOUNT READINESS CHECKLIST for the current Systeme.io interface. Ask me to confirm each setting without asking for sensitive values. Record only READY, NOT READY, or VERIFY for identity, timezone, currency, sender, support, payments, notifications, security, and existing asset inventory.

SCREENSHOTS CAN EXPOSE CUSTOMER OR PAYMENT INFORMATION. Crop or redact sensitive areas before using an image for troubleshooting.

Prepare Everything Before Page Building

Page editors become frustrating when you stop every few minutes to find a file, rewrite a button, resize an image, or remember a price. Stage the approved assets in one folder first.

Create this folder

06 - FUNNEL ASSETS - [SHORT PRODUCT NAME]

Add these subfolders

- 01 - PAGE COPY: Approved headlines, sections, FAQs, and CTA text.
- 02 - IMAGES: Product mockups, creator photo, logo, and proof images.
- 03 - DELIVERY FILES: Final customer downloads only.
- 04 - EMAILS: Lead, buyer, delivery, and support drafts.
- 05 - POLICIES: Refund, privacy, terms, contact, and disclaimer drafts.
- 06 - TESTING: Test matrix, screenshots, receipts, and issue log.
- 07 - FINAL RECORD: Final Funnel Record and launch notes.

Asset checklist

- Filenames are clear and versioned.
- No draft or source file is accidentally included in delivery.
- Images are readable on a phone and compressed appropriately.
- Every link has an owner and destination.
- Every proof asset has permission and context.
- Every customer file opens after downloading.

Staging prompt

Create a FUNNEL ASSET MANIFEST from the Offer Brief and Product Handoff. List required file, purpose, page or email location, approved filename, current status, mobile requirement, rights status, and final test. Flag duplicates, drafts, unsupported proof, and missing delivery files.

THE FUNNEL SHOULD REFERENCE FINAL FILES, NOT WHATEVER HAPPENS TO BE IN YOUR DOWNLOADS FOLDER.

Give the Business a Simple Home Online

A custom domain is optional, but it can make a new product feel more established and gives you a branded address for your funnel and email. You do not need an expensive domain, premium hosting package, or complicated website to begin.

A beginner-friendly low-cost option

Porkbun.com is one registrar worth comparing when you want to keep startup costs low. Prices vary by extension and promotion, so compare both the first-year price and the renewal price before purchasing. A cheap first year can renew at a much higher amount.

Before you buy

- Choose a name that is easy to say, spell, and type from a social-media video.
- Avoid extra hyphens, numbers, confusing spellings, and names that imitate another brand.
- Check the renewal price, not only the promotional registration price.
- Confirm WHOIS privacy is included or understand its cost and availability.
- Skip hosting, mailbox, certificate, and add-on purchases unless the funnel plan truly needs them.
- Search for obvious trademark conflicts before building the brand around the name.
- Use an account email and recovery method you control.

Simple buying path

1. Visit <https://porkbun.com> and search the planned domain.
2. Compare suitable extensions and their renewal prices.
3. Add only the domain and genuinely needed services to the cart.
4. Review the spelling carefully before paying.
5. Complete registration, verify the account email, and enable available account security.
6. Record the registrar, renewal date, and account owner in the Final Funnel Record.

YOU ARE BUYING AN ADDRESS, NOT A MAGIC BUSINESS. A clear affordable domain is enough. The funnel, product, message, and customer experience do the real work.

Let ChatGPT Guide the Technical Work Safely

Domain and email screens change, and every account can generate different verification records. The safest beginner workflow is to let the Funnel Studio organize the process while you copy only the exact values displayed inside your own accounts.

Domain setup master prompt

COPY THIS INTO THE FUNNEL STUDIO

Act as my beginner-friendly domain setup specialist, registrar DNS guide, Systeme.io specialist, and email-authentication guide. Help me connect a newly purchased domain to my Systeme.io funnel and create a branded business email safely.

Start by asking only for genuinely missing information: domain name, registrar, Systeme.io account, desired sender/support address, destination inbox, whether I want forwarding or a paid mailbox, and whether the funnel already exists. Ask one question at a time.

Work in phases: confirm setup; connect the exact hostname Systeme.io requires; add only account-generated DNS records; wait for verification and SSL; assign the domain to the correct funnel; configure incoming email; verify the sender; add provider-generated SPF, DKIM, and DMARC records; make the root domain open the intended page; test HTTPS, pages, checkout, email, and delivery; then create a final status report.

Use current official documentation for my registrar and Systeme.io whenever a setting, label, DNS record, or procedure needs verification. Never invent a host, target, verification record, CNAME, MX, TXT, SPF, DKIM, or DMARC value. Never tell me to delete an unfamiliar record until its purpose and conflict are confirmed. Explain what could break before any deletion or replacement.

Separate website DNS from email DNS. Explain that incoming forwarding and authenticated outgoing email are different. Do not request passwords, payment details, recovery codes, or private keys. Give complete instructions for only the current phase, wait for my result, and keep a verified checklist. Do not mark anything complete until we actually test it.

IF THE AI GUESSES A DNS VALUE, STOP. Account-specific values must come from the live provider screen or current official documentation.

Point the Domain to the Correct Systeme.io Funnel

The website connection and the email connection are separate jobs. Begin inside Systeme.io so it can generate the exact DNS values your registrar needs.

Start inside Systeme.io

1. Log in to Systeme.io on a computer.
2. Click your profile picture in the upper-right corner.
3. Click Settings in the menu that opens.
4. In the Settings menu, click Custom domains.
5. Click Add a domain.
6. Enter the hostname Systeme.io requests, normally `www.yourdomain.com`. Do not add `https`, a page path, or a trailing slash unless the current screen specifically requests it.
7. Submit the domain. Systeme.io will display the DNS records required for this exact account.
8. Leave that screen available or copy the records carefully. You will need the Type, Name/Host, and Value/Target for each record.

What Systeme.io may display

- A CNAME for `www` that points the website toward Systeme.io.
- A second CNAME or validation record used to issue the SSL certificate.
- A waiting, pending, verified, or ready status.

DO NOT COPY SAMPLE VALUES FROM THIS GUIDE. Use the records generated inside the customer's own Systeme.io account.

Add the Records in Porkbun and Assign the Funnel

Keep Systeme.io open and use a second browser tab for Porkbun. This makes it easier to copy each value exactly and avoids relying on memory.

Add the records at Porkbun

1. Log in to Porkbun and open Domain Management.
2. Find the correct domain and click Details on the right.
3. Find DNS Records and click its Edit control.
4. Use the record-type selector to choose the exact type Systeme.io displayed, usually CNAME.
5. Paste the Systeme.io Name/Host into Porkbun's Host field.
6. Paste the Systeme.io Value/Target into Porkbun's Answer field.
7. Leave TTL at its normal/default value unless official instructions require something else, then add the record.
8. Repeat for every required record. Preserve unrelated MX, TXT, DKIM, DMARC, and other records.

Return to Systeme.io

1. Return to Profile picture - Settings - Custom domains and wait for a verified or ready status.
2. Open Sites - Sales funnels and select the correct funnel.
3. Open the funnel settings, choose the newly verified domain from the domain dropdown, and save.
4. Select the sales-page step. In its configuration, clear only the editable text in the URL path field if this page should be the www homepage.
5. Open <https://www.yourdomain.com> in a private browser window and confirm the correct page appears securely.

CONNECTED IS NOT THE SAME AS ASSIGNED. A domain can verify successfully and still show the wrong page until the funnel domain and homepage path are saved.

Create a Professional Address Without Buying a Mailbox

A professional address such as support@yourdomain.com can forward incoming customer messages into an inbox you already check. Porkbun includes email forwarding with eligible registered domains, so this can be a practical low-cost starting point.

Forwarding versus a mailbox

- Email forwarding: Receives mail at the branded address and passes it into another inbox. A normal reply may show the personal destination address.
- Hosted mailbox: Has its own inbox and supports sending directly from the branded address. It may require a separate paid service.
- Systeme.io sender: Lets Systeme.io send approved campaigns and automations from the verified branded address. This is separate from normal one-to-one replies.

Create a Porkbun email forward

1. Open Porkbun - Domain Management.
2. Find the correct domain and click the envelope icon under EMAIL.
3. Find the email-forwarding section and create a new forward.
4. Enter the first part of the branded address, such as support.
5. Enter the complete destination inbox you already monitor.
6. Save the forward. Porkbun may create or repair the required MX and SPF records for its mail service.
7. Send a real test from an address different from the destination inbox.
8. Confirm the test reaches the destination inbox and record the result.

Important limitation

Forwarding lets customers reach the branded address, but it does not automatically let you write a personal reply that appears to come from that address. Use a hosted mailbox or another properly configured sending service when that capability is required.

INCOMING AND OUTGOING EMAIL ARE DIFFERENT JOBS. Confirm that the forward receives mail before configuring Systeme.io to send automated mail.

Verify the Address Systeme.io Uses to Send

Systeme.io requires both a verified sender address and an authenticated custom domain for branded sending. Complete both parts and use only the records generated inside the live account.

Confirm the sender address

1. Click the profile picture in the upper-right corner of Systeme.io.
2. Click Settings, then click Emails in the settings menu.
3. Scroll to Verified email addresses.
4. Click the link to confirm an email address, enter the branded address, and save.
5. Open the verification email in the destination inbox and click its confirmation link.
6. Return to the Emails settings and confirm the address now shows Verified.

Authenticate the domain

1. Remain in Profile picture - Settings - Emails and find the Domains section.
2. Click the domain-authentication link and enter the root domain without www.
3. Click Save so Systeme.io generates the required CNAME records and DMARC record.
4. In Porkbun, open Domain Management - Details - DNS Records - Edit.
5. Add every generated record using its exact type, host, value, and required format. Preserve unrelated records.
6. Return to Systeme.io and wait until the domain status shows verified.
7. In the Sender section, select the branded default sender address and sender name, then click Save at the top.
8. Run a real automated email test and inspect the visible From address, Reply-To behavior, links, and delivery.

DO NOT CREATE MULTIPLE CONFLICTING SPF RECORDS OR INVENT DKIM/DMARC VALUES. Use the current provider-generated records and investigate conflicts before replacing anything.

Make the Short Address Open Securely

When Systeme.io connects the www hostname but does not natively serve the root domain, the registrar can redirect the short address to the secure www sales page. Configure this only after the www page works correctly.

Porkbun root-forwarding pattern

1. Open Domain Management, expand Details, and edit URL Forwarding.
2. Leave the forwarding hostname blank when forwarding only the root domain.
3. Enter the complete working destination beginning with https://www.
4. Keep wildcard forwarding off unless you intentionally want undefined subdomains forwarded.
5. Use a temporary 302 redirect while testing; change it only for a documented reason.
6. Choose requested-path behavior deliberately. For one homepage, it can remain off.
7. Do not use masked forwarding.
8. Submit, then preserve the working www CNAME and unrelated email records.

SSL may be the final waiting step

Porkbun may need time to generate the free SSL certificate used by the secure root redirect. During that period, the root address may display a security warning even though the www funnel is already secure.

If the root says Not Secure

1. Open the domain Details area and inspect SSL.
2. Wait for the certificate-ready status instead of randomly changing DNS.
3. Do not revoke certificates or delete validation records while provisioning.
4. Retest the root address in a private browser after the certificate is ready.
5. If it exceeds the provider's documented timeframe or shows an actual error, investigate the displayed status or contact support.

Final domain test

- The www address opens the correct sales page securely.
- The root address redirects securely to www.
- No browser certificate warning appears.
- The branded support address receives a test message.
- Systeme.io sends from the intended verified address.
- Every funnel button, policy link, checkout page, thank-you page, and download uses the intended live destination.

DO NOT MARK THE DOMAIN COMPLETE FROM A GREEN DASHBOARD ALONE. Test both addresses, incoming mail, outgoing mail, and every customer-facing link.

How to Use the Next Pages Without Getting Lost

The earlier pages explain what the system must accomplish. The next pages show where to click. Work through them in order on a computer. Keep this PDF open on a phone or second screen so you do not have to switch constantly.

The rule for every technical step

1. START: Return to the named starting screen before following the path.
2. PATH: Click the menus and buttons in the order shown.
3. ENTER: Use the approved names, copy, prices, files, and addresses from your own Offer Brief.
4. SAVE: Click the page or settings Save button before leaving.
5. VERIFY: Open the result outside the editor and prove it works.
6. RECORD: Add the final name, URL, and status to the Final Funnel Record.

When your screen looks different

1. Stop before changing an unrelated setting.
2. Check that you are in the correct account, funnel, and funnel step.
3. Use Systeme.io Help and search for the exact task, not a vague word such as setup.
4. Ask the Funnel Studio to verify the current official instructions.
5. Share a cropped screenshot only after hiding customer, payment, or account information.

DO NOT SPEED-RUN THIS SECTION. A saved page is not a working page. Complete the VERIFY step before moving forward.

Know Where the Main Tools Live

Begin at the main Systeme.io dashboard after signing in. Menu names can move, but these are the primary work areas used in this guide.

Main navigation

- Profile picture - Settings: Account details, emails, custom domains, and payment gateways.
- Sites - Sales funnels: Funnel pages, step order, settings, domains, automation rules, and statistics.
- Emails - Campaigns: The ordered email sequences sent to leads or customers.
- Automations - Rules: Account-level trigger-and-action rules.
- Contacts: Individual subscribers, tags, and contact history.
- Sales - Transactions: Purchases, payment records, and refund access.

Before creating anything

1. Click Sites - Sales funnels and check whether a funnel with the planned name already exists.
2. Click Emails - Campaigns and check whether the planned campaign already exists.
3. Click Automations - Rules and review existing rules before using a limited free-plan slot.
4. Use a written name list. Do not create duplicates because an item was difficult to find.
5. Return to the main dashboard before beginning the PayPal connection.

YOU ARE NOT EXPECTED TO MEMORIZE THE DASHBOARD. Return to this page whenever a later instruction names a work area.

Authorize the Account That Will Receive Payment

This product uses PayPal. A PayPal Business account is required for the integration described in Systeme.io documentation. Connecting PayPal does not automatically make it appear on every funnel; that happens on the next payment page.

Exact path

1. Start at the Systeme.io dashboard.
2. Click your profile picture in the upper-right corner.
3. Click Settings.
4. In the Settings menu, click Payment gateways.
5. Find PayPal and click Connect.
6. A PayPal tab or window opens. Sign in to the correct PayPal Business account.
7. Complete any PayPal security check, review the requested connection, and authorize it.
8. Click Return to systeme.io. Confirm the PayPal Merchant ID or connected status appears.

Do not share

- PayPal password, security code, recovery code, bank details, or full card information.
- Screenshots showing private account numbers or customer transactions.

Verification

1. In PayPal, open the profile/account settings, then Notifications. Find Instant payment notifications and click Update.
2. Click Choose IPN settings. Enter <https://systeme.io/payment/webhook/listening-paypal> in Notification URL, choose Receive IPN messages (Enabled), and click Save. Recheck the official article if this value ever changes.
3. Refresh Payment gateways and confirm the connection remains visible.
4. Record CONNECTED - NOT YET PURCHASE TESTED in the Final Funnel Record.
5. Do not call the gateway complete until the live order-form test succeeds.

CONNECTED ONLY PROVES AUTHORIZATION. It does not prove the product, price, order form, payment, delivery, or refund path works.

Build the Empty Container First

A funnel is the container that holds pages in a specific order. Create one funnel for this customer journey instead of scattering pages across unrelated funnels.

Exact path

1. Start at the Systeme.io dashboard.
2. Click Sites in the top navigation.
3. Click Sales funnels.
4. Click Create.
5. Enter the approved funnel name, such as Creator Business in a Box.
6. Choose the domain currently available. You can assign the custom domain after it verifies.
7. Choose the approved currency. This must match the price plan and sales copy.
8. Choose Sell if Systeme.io asks for a funnel goal. Use Custom only when you understand the extra setup.
9. Click Create or Save to open the new funnel.

You should now see

- The funnel name near the top.
- A left-side list of funnel steps.
- A configuration area for the selected step.
- An Add step button.

Verification

1. Return to Sites - Sales funnels.
2. Confirm the funnel appears once, with the correct name and currency.
3. Open it again before adding pages.

IF THE CURRENCY IS WRONG, FIX IT BEFORE BUILDING THE ORDER FORM. Do not hide a currency mismatch with page text.

ADD THE FUNNEL STEPS

Create the Pages in Customer Order

The step type controls how Systeme.io treats a page. A Sales Thank You page is not the same as an Opt-in Thank You page. Select the type deliberately.

Add one step at a time

1. Open Sites - Sales funnels and click the correct funnel.
2. Click Add step.
3. Enter the page name.
4. Open the Type list and choose the correct type.
5. Click Save.
6. Repeat until every required step appears in the left-side list.
7. Drag or reorder the steps so the customer journey is easy to inspect.

Recommended Option B step list

- 01 - Free Guide Opt-In - Type: Opt-in page.
- 02 - Free Guide Thank You - Type: Opt-in thank-you page.
- 03 - Business in a Box Sales Page - Type: Sales page.
- 04 - Business in a Box Order Form - Type: Order form.
- 05 - CSI One-Time Offer - Type: Upsell or Downsell only when approved.
- 06 - Purchase Thank You - Type: Sales thank-you page.
- Privacy, Terms, Refund, and Contact - Custom/information pages as supported.

Verification

1. Read every step name and type from top to bottom.
2. Correct duplicates or wrong page types before choosing templates.
3. Copy the final step list into the Final Funnel Record.

A PAGE NAME IS FOR YOU. THE PAGE TYPE IS FOR THE SYSTEM. Both must be correct.

Learn the Same Editor Once

Most funnel pages use the same visual editor. Learn the basic pattern on one page, then repeat it. Start with a simple template; unnecessary sections create more mobile problems.

Choose a template

1. Click a funnel step in the left-side list.
2. Browse the templates shown for that page type, or choose the blank option when available.
3. Click Select beneath the chosen template.
4. Click Edit page to open the visual editor.

Inside the editor

1. Click an existing element to open its settings.
2. Replace placeholder text with approved copy; do not edit the promise while designing.
3. Drag new elements from the editor panel only when needed.
4. Use section, row, and column containers to control layout.
5. Check desktop and mobile preview controls before saving.
6. Click Save changes or Save in the upper-right corner.
7. Exit the editor and use View funnel step or the preview control to open the real page.

If an element will not select

- Make sure a parent section is not selected instead.
- Use the editor layer or element navigation when available.
- Do not delete the whole section merely to remove one stubborn element.
- Save before making a risky layout change.

EDITOR PREVIEW IS NOT THE FINAL TEST. Open the saved page in a private browser and tap every interactive element.

Collect the Email and Move to the Next Step

The opt-in page needs a form input and a form-submission button. A decorative button with a normal URL does not create the same subscription event.

Exact build

1. Open Sites - Sales funnels, select the funnel, and click 01 - Free Guide Opt-In.
2. Click Edit page.
3. Add or select the email form-input element.
4. In its settings, confirm the input type is Email and the field is required.
5. Add or select the main button beneath the form.
6. Open the button settings and choose the action Submit form.
7. Set the post-submission action to the next funnel step or the approved thank-you destination.
8. Remove unnecessary form fields. Email alone is usually enough for this free guide.
9. Click Save in the upper-right corner.

Test it

1. Open the live opt-in page in a private browser window.
2. Enter a dedicated test email address and submit the form.
3. Confirm the correct thank-you page opens.
4. In Systeme.io, open CRM - Contacts and search for the test email.
5. Confirm the contact exists and record the test result.

Common failure

- Button goes somewhere but no contact appears: Recheck that the action is Submit form.
- Form submits but wrong page opens: Recheck the button redirection or funnel-step order.
- Email rejected: Confirm the form element uses the Email field type.

DO NOT ASSUME A PRETTY FORM WORKS. A successful contact record and correct next page are the proof.

Deliver the Promised Bonus Immediately

The thank-you page confirms the opt-in and gives the visitor a clear next action. If you promised an immediate download, do not make the visitor wait for email alone.

Exact build

1. In the funnel, click 02 - Free Guide Thank You.
2. Select a simple template and click Edit page.
3. Add a confirmation headline that tells the visitor the request worked.
4. Add one short instruction to check the inbox and spam folder.
5. Add a button for the promised guide or bonus.
6. In the button settings, choose Download file when available, or attach the approved hosted file URL.
7. Add a separate button or text link to the main sales page only after the promised delivery is obvious.
8. Click Save.

Upload a file through a page link

1. Add or select a text element in the editor.
2. Highlight the words that should become the download link.
3. Click the link icon.
4. Open the file chooser beside the link field.
5. Upload the final approved file or select the existing file.
6. Click Insert, then Confirm, and save the page.

Verification

1. Open the page while logged out or in a private browser.
2. Tap the download button and text link on a phone.
3. Open the downloaded file and confirm the correct version and filename.

A FILE SHOWING IN THE EDITOR DOES NOT PROVE A VISITOR CAN DOWNLOAD IT. Test while logged out.

Create a Recoverable Delivery Path

The thank-you page provides immediate access. Email provides recovery when the visitor closes the page. Use both when the free guide is promised by email.

Create the delivery email from the funnel step

1. Open Sites - Sales funnels and select the correct funnel.
2. Click the 01 - Free Guide Opt-In step.
3. Open the Automation rules tab for that step.
4. Click Add rule.
5. Add the trigger Funnel step form subscribed.
6. Add the action Send email.
7. Click the email edit/pencil control.
8. Enter the approved subject and delivery message.
9. Put the guide link near the top. Add the file only if it is within the platform attachment limit and tested.
10. Save the email, then save the rule.

Test the real trigger

1. Use a fresh test email that is not already subscribed.
2. Submit the live opt-in form.
3. Confirm the email arrives, the sender is correct, and the download opens.
4. Check inbox, spam, and promotions folders.
5. Record the delivery time and result.

DO NOT TEST ONLY WITH A SEND-TEST BUTTON. Run the actual form subscription so the trigger, action, sender, and link are tested together.

Connect Every Buy Button to Checkout

Build from the approved sales copy. The page should explain the problem, product, fit, deliverables, price, effort, limitations, and next step without requiring a novel before checkout.

Exact build

1. In the funnel, click 03 - Business in a Box Sales Page.
2. Choose the approved template and click Edit page.
3. Replace every placeholder headline, paragraph, image, testimonial, price, and button.
4. Delete template claims, countdowns, logos, proof, or bonuses you cannot support.
5. Select the first buy button.
6. In the button action, choose the next funnel step or open URL action that leads to the correct order form.
7. Repeat for every purchase button. Do not assume copied buttons keep the right destination.
8. Add visible links to Privacy, Terms, Refund Policy, and Contact near the footer.
9. Click Save.

Verification

1. Open the live sales page in a private browser window.
2. Click every buy button from top to bottom.
3. Confirm every button opens the same correct order form.
4. Open every footer policy link and confirm no 404 page appears.
5. Compare the displayed product name, price, and deliverables with the Offer Brief.

A TEMPLATE IS FULL OF SOMEONE ELSE'S ASSUMPTIONS. Remove every claim and link that does not belong to this product.

Create the Page Where Money Changes Hands

The order form must collect the buyer email, show the correct offer, and display the approved payment method. This page is not the place for a surprise price or vague billing language.

Open and edit the step

1. In the funnel, click 04 - Business in a Box Order Form.
2. Choose a simple order-form template and click Select.
3. On the step configuration page, find Choose offer type.
4. Choose Digital product.
5. Click Edit page.
6. Confirm the form contains Email, First name, and Last name fields. Systeme.io currently requires all three on PayPal order forms.
7. Keep those three PayPal-required fields and add another customer field only when the business genuinely needs it.
8. Add the exact product name, one-time price, what is included, and policy links.
9. Keep the order-form/payment element required by the template.
10. Click Save and return to the step configuration.

Do not change yet

- Do not type a fake price only into page text. The actual charge comes from the price plan.
- Do not remove payment or order elements because they look plain.
- Do not publish until the product resource and price plan on the next page are saved.

PAGE TEXT DESCRIBES THE CHARGE. THE PRICE PLAN CREATES THE CHARGE. They must match exactly.

Configure the Actual One-Time Charge

The digital product identifies what was purchased. The price plan identifies how much and how often the customer is charged.

Create or select the digital product

1. Remain on the Order Form step configuration page.
2. Confirm Digital product is selected as the offer type.
3. Click the plus/add control beside the Digital product field if the product does not exist.
4. Enter the approved customer-facing product name and save it.
5. Select that product in the order form.

Create the price plan

1. Click the plus/add control beside the price-plan field.
2. Choose Create new when no approved plan exists.
3. Enter a clear internal plan name and customer-facing display name.
4. Choose One-time payment.
5. Enter the approved amount and currency.
6. Review tax behavior and statement descriptor rather than accepting them blindly.
7. Click Save inside the price-plan window.
8. Back on the order-form configuration, select the saved plan and click the main Save button.

Verification

1. Refresh the step and confirm the same product and plan remain selected.
2. Open the live order form and compare the visible amount with the plan.
3. Record product name, plan name, price, currency, and billing type.

ONE-TIME MEANS ONE-TIME. Do not choose a subscription or installment plan unless the approved offer explicitly says so.

Make the Connected Gateway Appear at Checkout

PayPal can be connected at the account level and still be disabled for a specific funnel. Enable it in the funnel settings after the order form and price plan exist.

Exact path

1. Start at Sites - Sales funnels.
2. Open the correct funnel.
3. Open Funnel settings.
4. Find the payment-method or payment-gateway section.
5. Check or enable PayPal.
6. Leave Stripe disabled when no Stripe account is connected and the offer uses PayPal only.
7. Click Save.
8. Return to the Order Form step and open View funnel step.

You should see

- The correct product and amount.
- A buyer email field.
- PayPal as an available payment method.
- No payment method that the business does not support.

If PayPal does not appear

1. Recheck Profile picture - Settings - Payment gateways.
2. Recheck the funnel payment setting and save again.
3. Confirm the order form has a selected product and price plan.
4. Confirm the editor still contains the required order-form/payment element.
5. Use the current PayPal integration help article before disconnecting anything.

DO NOT DISCONNECT A WORKING GATEWAY AS THE FIRST TROUBLESHOOTING STEP. Check the funnel, offer, price, and page element first.

Keep the Add-On Separate and Declineable

Build this step only when the CSI product, price, files, and checkout-session terms are approved. The main product must remain complete without it.

Exact build

1. Open the correct funnel and click Add step.
2. Name the step CSI One-Time Offer.
3. Choose Upsell or the approved one-click offer type, then save.
4. Choose a simple template and click Edit page.
5. Replace all copy with the approved CSI offer, deliverables, separate price, and limitations.
6. Select the accept button and confirm it uses the platform accept/upsell action.
7. Select the decline link and confirm it uses the platform decline action or correct next-step path.
8. Return to the step configuration and create/select the separate CSI digital product and one-time price plan.
9. Save the step configuration.

Test both branches

1. Complete a controlled purchase and accept CSI. Confirm the separate charge and CSI delivery.
2. Complete a second controlled path and decline CSI. Confirm there is no CSI charge or delivery.
3. Confirm both branches reach the Purchase Thank You page.
4. Confirm declining does not remove or delay the main product.

THE DECLINE LINK MUST WORK. A buyer must be able to refuse the optional offer without losing the purchase already made.

Show the Buyer Exactly What Happens Next

Use a Sales Thank You page after a purchase. This page confirms completion, shows the next action, and provides backup access without exposing private payment information.

Exact build

1. In the funnel, click 06 - Purchase Thank You.
2. Confirm the step type is Sales thank-you page.
3. Choose a simple template and click Edit page.
4. Add a clear purchase-confirmation headline.
5. Tell the buyer to check the purchase email and spam folder.
6. Add a START HERE instruction.
7. Add the approved main-product access button or secure delivery destination.
8. Explain where CSI access appears only for customers who purchased it.
9. Add the support email and realistic response expectation.
10. Add the order-summary element when appropriate for this page type.
11. Click Save.

Verification

1. Reach this page through a completed test transaction, not only a copied URL.
2. Tap every access and support link while logged out.
3. Confirm the main ZIP or files open and contain all promised items.
4. Confirm the page does not expose another customer's information.

THE THANK-YOU PAGE IS BACKUP DELIVERY, NOT THE ONLY DELIVERY. The buyer must also receive recoverable access by email.

CREATE THE TAGS

Use Consistent Labels for Leads and Buyers

Create only the tags the automations will actually use. Record exact spelling because a nearly identical second tag can split the audience.

Exact path

1. Start at the Systeme.io dashboard.
2. Click CRM.
3. Click Tags.
4. Click Create.
5. Enter the first approved name in the Tag name field, then click Save.
6. Repeat for each required tag.
7. Search the list for duplicate spellings before leaving.

Minimum useful set

- LEAD - Monetization Guide
- CUSTOMER - Business in a Box
- CUSTOMER - CSI when the companion offer exists.
- REFUND - Business in a Box only when the process will actually use it.

Verification

1. Open one test contact.
2. Confirm the intended tag can be applied and removed.
3. Remove the manual test tag before testing automation.
4. Copy the exact tag names into the Final Funnel Record.

DO NOT CREATE A NEW TAG INSIDE EVERY RULE WITHOUT CHECKING THE MASTER LIST. Reuse the approved tag.

Build and Activate the Sequence in Order

A campaign is the container. The emails inside it need content, an order, a delay, and activation. A saved draft email does not send automatically.

Create the campaign

1. Start at the Systeme.io dashboard.
2. Click Emails.
3. Click Campaigns.
4. Click Create.
5. Enter the approved campaign name, sender email, and internal description.
6. Click Save.

Add each email

1. Open the campaign and click Add an email.
2. Enter the subject, sender name, sender address, and approved body.
3. Add the tested link and confirm the unsubscribe support remains present.
4. Save the email.
5. Repeat for the remaining approved messages.
6. Use the three-dot menu beside an email and click Activate.
7. Choose which email comes before it, the delay, and the allowed sending time or day.
8. Activate in the intended sequence.

Verification

1. Read the campaign from first email to last.
2. Confirm the first delivery email has the intended immediate or shortest approved delay.
3. Confirm no two emails accidentally share the same position or wrong predecessor.
4. Confirm every required email shows active rather than draft.

SAVE CREATES THE EMAIL. ACTIVATE SCHEDULES IT. The campaign is incomplete until both are done.

Subscribe New Opt-Ins to the Campaign

The lead automation connects a successful form submission to the lead tag and campaign. Use the simplest method supported by the account plan.

Account-level rule path

1. Start at the Systeme.io dashboard.
2. Click Automations.
3. Click Rules.
4. Click Create.
5. Click Add trigger.
6. Choose Funnel step form subscribed.
7. Select the correct funnel and 01 - Free Guide Opt-In step.
8. Click Add action and choose Add tag; select LEAD - Monetization Guide.
9. Add another action and choose Subscribe to campaign; select the approved lead campaign.
10. Save and enable the rule.

If the free plan allows only one rule

- Review whether the opt-in step already sends the delivery email through its own Automation rules tab.
- Use the limited account-level rule for the action combination that cannot be handled safely elsewhere.
- Do not create several half-finished rules and assume the platform will merge them.

Verification

1. Submit the live form with a fresh test email.
2. Open CRM - Contacts and confirm the lead tag appears.
3. Open the contact campaign information and confirm subscription.
4. Confirm the first email arrives through the real trigger.

TEST WITH A FRESH ADDRESS. Existing contact history can hide whether a new rule truly worked.

Send the Correct Files After a Successful Sale

Build the purchase-delivery rule on the main order-form step so the trigger is tied to the correct sale. The delivery email should lead with access, not more selling.

Exact path

1. Open Sites - Sales funnels and select the correct funnel.
2. Click 04 - Business in a Box Order Form.
3. Open the Automation rules tab.
4. Click Add rule.
5. Add the trigger New sale.
6. Add the action Add tag and select CUSTOMER - Business in a Box.
7. Add the action Send email.
8. Open the email editor and enter the approved customer-access email.
9. Place the main ZIP/download link and START HERE direction near the top.
10. State the support address and what to do if the link fails.
11. Save the email, then save and enable the rule.

CSI must use its own sale

- Open the CSI offer step and create a separate New sale rule for CSI access.
- Use the CSI customer tag and CSI file link only.
- Do not attach CSI delivery to the main-sale trigger or decliners may receive it.

Verification

1. Complete a controlled main purchase.
2. Confirm the customer tag, access email, ZIP link, and thank-you page.
3. Run separate CSI accept and decline tests before launch.

AN ACTIVE RULE PROVES CONFIGURATION, NOT DELIVERY. Only a completed purchase proves the full customer path.

Make the Terms Visible Before Payment

Legal and policy text should be reviewed for the business and jurisdiction. This page explains the technical placement, not whether a policy is legally sufficient.

Create each page

1. Open the correct funnel in Sites - Sales funnels.
2. Click Add step.
3. Name the page Privacy Policy, Terms and Conditions, Refund Policy, or Contact.
4. Choose a custom or suitable information-page type and save.
5. Choose a simple template and click Edit page.
6. Paste the reviewed policy text, business name, contact information, and effective date.
7. Click Save, exit, and copy the live page URL.
8. Repeat for each policy page.

Link the pages

1. Open the sales page editor and scroll to the footer.
2. Highlight the policy name or select its button.
3. Choose the link/open-URL action and paste the complete live policy URL.
4. Repeat on the order form and other required pages.
5. Save each edited page.

Verification

1. Open the sales page and order form in a private browser.
2. Click every policy and contact link.
3. If a page returns 404 after a domain change, open that policy in the editor, save it again, and retest.
4. Search every page for an old Systeme.io or previous-domain URL.

**CHANGING THE FUNNEL DOMAIN MAY NOT UPDATE HARDCODED LINKS.
Inspect every policy and button destination manually.**

Verify Payment, Delivery, and the Refund Path

There is no honest way to mark the purchase experience fully verified without completing a real controlled transaction. If testing would create an unaffordable fee, record the purchase as UNTESTED rather than pretending.

Purchase test

1. Open the live sales page in a private browser window.
2. Click a buy button and confirm the correct order form opens.
3. Use a dedicated buyer email and review the exact product, amount, currency, and one-time billing.
4. Complete the PayPal payment.
5. Accept or decline CSI according to the test case.
6. Confirm the correct Purchase Thank You page opens.
7. Open the receipt and delivery emails.
8. Download and open every expected file.
9. In Systeme.io, open Sales - Transactions and find the test transaction.
10. Confirm the expected tags and campaign state on the test contact.

Refund test

1. Open Sales - Transactions. Use the filters to locate the correct test transaction.
2. Click the three-dot menu beside that transaction, then click Refund.
3. Confirm the refund only after verifying the customer, product, date, and full transaction amount. Systeme.io currently does not support partial refunds through this control.
4. Confirm the status changes in Systeme.io and PayPal.
5. Confirm whether tags, access, and email follow-up require a manual change.
6. Record any processor fee that was not returned.

NEVER USE A REAL CUSTOMER AS THE FIRST TEST. Record the test email, transaction date, result, refund status, and any unrecovered fee.

Prove the Funnel Works Where Traffic Arrives

Editor mobile preview helps with layout, but the final test happens on a real phone using the live pages. Test with Wi-Fi and cellular data when practical.

Page-by-page phone test

1. Text the live opt-in URL to your phone or open it from a private mobile browser.
2. Read the page without pinching or zooming.
3. Submit the form and confirm the keyboard, validation, and next page.
4. Download and open the free guide.
5. Open the sales page and tap every buy button.
6. Inspect the order form without submitting another payment.
7. Open every policy and contact link.
8. Open the real delivery email and download the purchased ZIP or files.
9. Repeat critical tests on another phone type when available.

Pass only when

- No headline or button trails off the screen.
- Text is readable at normal phone size.
- Buttons are easy to tap and are not covered by popups.
- Images crop correctly and do not contain unreadable tiny text.
- The price, billing type, and decline option remain visible.
- Downloads open with understandable filenames.
- No link opens an old domain, editor page, login wall, or 404.

A SCREENSHOT PROVES APPEARANCE. TAPPING THE LIVE BUTTON PROVES FUNCTION. You need both.

Make the Email Identity Trustworthy

A useful funnel fails if messages disappear into spam or arrive from a confusing sender. Establish the sender before building automations.

Current Systeme.io guidance

- Confirm the sender email address used for campaigns and automated messages.
- For a professional sending domain, authenticate the domain according to the current help article.
- Systeme.io documentation states that domain authentication is required to send using an authenticated personal domain.
- DNS changes can require time to propagate; do not schedule launch five minutes after setup.
- Use a real Reply-To destination that someone monitors.

Beginner translation

- Sender name: The human or business name shown in the inbox.
- Sender email: The address shown as sending the message.
- Reply-To: Where a customer reply should arrive.
- Domain authentication: DNS records that help providers verify your permission to send.
- Test address: A separate inbox used to inspect real delivery.

Setup prompt

Using only current official Systeme.io documentation, guide me through sender confirmation and domain authentication one verified step at a time. Explain what I should see, what value I must copy from Systeme.io, where it belongs at my domain provider, how to verify it, and what not to expose here. Stop when a provider-specific instruction is unknown.

DO NOT INVENT DNS VALUES. Copy the exact records shown inside your account and follow the current instructions for your domain provider.

Connect the Account That Actually Receives Money

Last reviewed October 17, 2026: Systeme.io documents Stripe and PayPal connections under Profile picture > Settings > Payment gateways. Exact labels and available providers can vary by country and account, so verify the current screen.

Before connecting

- Use the legal owner or business information required by the payment provider.
- Confirm supported country, currency, bank account, tax, and identity requirements.
- Review processor fees, payout schedule, refund handling, disputes, and reserves.
- Ensure the funnel currency matches the configured price plan currency.
- Decide whether one or more payment methods will appear at checkout.
- Keep payment credentials out of ChatGPT and screenshots.

Connection sequence

1. Open your Systeme.io account settings.
2. Open Payment gateways.
3. Select the supported provider you intend to use.
4. Complete the provider-controlled authorization flow.
5. Return to Systeme.io and confirm the connection status.
6. Open the funnel settings and enable the intended payment methods.
7. Save, then verify the order form displays the correct method.

Payment checklist prompt

Create a PAYMENT READINESS CHECK for my country, currency, one-time digital product, refund decision, and selected provider. Use current official documentation. Separate what Systeme.io controls from what the payment processor controls. Do not request or store sensitive financial information.

CONNECTED DOES NOT MEAN TESTED. The funnel is not ready until a real purchase path and refund process have been verified.

Build the Empty Structure First

Create the page containers before designing them. This lets you confirm the order of the journey and makes button destinations easier to connect.

Current starting path

1. Open Sites, then Sales funnels.
2. Choose Create.
3. Use a clear internal name: BIB - [Product] - V1 - [Date].
4. Choose the appropriate funnel goal or a custom funnel when needed.
5. Select the approved currency.
6. Save the new funnel.
7. Add only the steps in the approved map.

Recommended step order

1. Free Guide Opt-in.
2. Free Guide Thank You / Bonus Download.
3. Business in a Box Sales Page.
4. Business in a Box Order Form.
5. CSI One-Time Offer.
6. Sales Thank You / Customer Start Page.

Name each step clearly

- Use customer purpose, not Template 1 or Page Copy.
- Add V1 only when it helps distinguish a controlled rebuild.
- Do not delete a working page until its replacement is tested.
- Record every live URL in the Final Funnel Record.

SYSTEME.IO ROUTING DEPENDS ON PAGE TYPE AND ORDER.

According to its current help documentation, the order form can route automatically to upsell/downsell and thank-you steps when configured in the required sequence.

Choose One Visual Language for the Whole Funnel

The funnel should feel like one product from opt-in through delivery. Repeated visual rules reduce editing time and help customers recognize that they have not been sent somewhere unrelated.

Lock these design rules

- Page width: A readable central column rather than edge-to-edge paragraphs.
- Body text: Large enough to read comfortably on a phone.
- Headline: One clear message, not six competing banners.
- Accent colors: Use the same cyan and small hot-pink accents across pages.
- Buttons: One primary style and clear action language.
- Images: Relevant product or creator images with compressed file sizes.
- Spacing: Short sections with visible breathing room.
- Footer: Support and required policy links where appropriate.

Mobile-first rule

BUILD THE DESKTOP PAGE, THEN REVIEW EVERY SECTION IN MOBILE VIEW BEFORE MOVING ON. A page is not finished because the desktop editor looks good.

Design brief prompt

Create a one-page FUNNEL DESIGN BRIEF using my existing brand colors and assets. Define background, primary text, secondary text, accent colors, button style, spacing, image treatment, headline sizes, body sizes, mobile rules, and elements to avoid. Do not create a new brand. Prioritize readability, trust, and fast scanning.

Avoid

- Tiny gray text, excessive animation, autoplay audio, and decorative clutter.
- Multiple competing buttons above the first explanation.
- Images containing unreadable text baked into the graphic.
- A different font, color system, or tone on every page.

Trade One Useful Guide for Permission to Email

The opt-in page has one job: explain the free guide clearly enough that the right visitor chooses to receive it. It is not a full sales page and should not hide what happens after signup.

Required sections

1. Eyebrow: Identify the audience or immediate situation.
2. Headline: State the useful result of the free guide.
3. Subheadline: Explain what they will understand or complete.
4. Three bullets: Specific takeaways, not exaggerated outcomes.
5. Visual: A clean guide mockup or relevant image.
6. Form: Ask only for information you genuinely need.
7. Button: Describe the action, such as Send Me the Free Guide.
8. Consent note: Explain that helpful emails will follow and they can unsubscribe.

Opt-in copy prompt

Using the approved free guide and audience evidence, write mobile-first opt-in page copy. Provide EYEBROW, HEADLINE, SUBHEADLINE, THREE BULLETS, FORM LABELS, BUTTON, CONSENT NOTE, and SHORT PRIVACY NOTE. Do not promise income, instant results, or a secret unavailable elsewhere. Explain what arrives after signup.

Button settings

- The action should submit the form.
- The successful action should continue to the intended next step.
- Required fields should display understandable errors.
- The form must be tested with an inbox not already used by the automation.

EMAIL IS PERMISSION, NOT OWNERSHIP. Send what you promised, identify yourself, and make unsubscribe easy.

Deliver the Win and Reveal the Bonus

This page confirms the signup, provides the promised access, and can reveal the free bonus without making the visitor wonder whether the form worked.

Recommended page order

1. Confirmation: “You are in” or another clear success statement.
2. Inbox instruction: Tell them which sender name and subject line to look for.
3. Primary download: One obvious button for the first guide.
4. Free bonus reveal: Explain why the second guide helps them take the next step.
5. Bonus download: A separate clearly labeled button.
6. Next action: Invite them to review the Business in a Box offer when ready.
7. Support: Give a contact path if the email or download does not arrive.

Thank-you copy prompt

Write the free-guide thank-you page. Make delivery the first priority. Include confirmation, inbox instructions, first download button, a FREE BONUS section, bonus explanation, second download button, a soft bridge to Business in a Box, and support instructions. The bonus must feel generous without pretending it was secretly expensive.

Delivery choices

- Link the files on the page and also send them by email.
- Use clear filenames and verify access in a private browser window.
- Do not rely only on the browser page because a visitor may close it.
- Do not make the sales pitch appear before the promised download.

DELIVER FIRST. EARN THE NEXT CLICK SECOND. The visitor should never feel that the free guide was bait for a page that withholds it.

Send the Free Guides by Email Too

Email creates a recovery path. If the visitor closes the thank-you page, they should still be able to find the guides and understand what happens next.

Delivery email structure

1. Subject: Name the promised guide plainly.
2. Opening: Confirm the request and identify Mr. Mike.
3. Primary link: Place the main guide near the top.
4. Bonus link: Clearly identify the additional free resource.
5. Use instruction: Tell them which guide to open first.
6. Expectation: Explain what helpful emails may follow.
7. Support: Tell them how to report a broken link.
8. Footer: Include required sender and unsubscribe information.

Current file-delivery note

Systeme.io documents three common eBook delivery methods: an email attachment, an email download link, or a direct download link on the thank-you page. Its current help article notes a 5 MB attachment limit and represents attachments as links. A hosted download link plus thank-you-page backup is usually easier to maintain.

Delivery email prompt

Write the free-guide delivery email in Mr. Mike's direct, helpful voice. Include a plain subject, primary guide link placeholder, bonus link placeholder, which file to read first, one immediate action, what emails may follow, support contact placeholder, and unsubscribe reminder. Do not oversell the paid product in the delivery section.

TEST THE LINKS OUTSIDE YOUR LOGGED-IN SESSION. A link that works only because you are the owner is not customer delivery.

Lead With Recognition, Then Build the Decision

The sales page should guide the right buyer through a decision in the same order established in the Offer Brief. It does not need to be loud. It needs to be complete, believable, and easy to scan.

Recommended section order

1. Audience recognition and primary promise.
2. The current problem and practical cost of staying scattered.
3. Why another pile of tips is not the complete solution.
4. The Business in a Box method and what makes it organized.
5. Exactly what the buyer receives.
6. How the process works from first prompt to finished product.
7. Who it is for and who it is not for.
8. Proof, creator context, or process evidence.
9. Prerequisites, customer effort, tools, and limitations.
10. Bonuses that genuinely support completion.
11. Price, access, support, and refund terms.
12. FAQs and final call to action.

Sales-page prompt

Using only the approved Offer Brief, write the sales page in the section order above. For each section provide SECTION PURPOSE, HEADLINE, BODY, OPTIONAL BULLETS, CTA WHEN NEEDED, and PROOF OR LIMITATION NOTE. Preserve the approved price and promise. Do not invent testimonials, urgency, value totals, income claims, or customer results. Keep paragraphs short for mobile. Mark image placements [IMAGE: purpose].

DO NOT LET CHATGPT “IMPROVE” THE PROMISE. Stronger wording that changes the expected result is a product change, not copy editing.

Make Every Claim Survive a Skeptical Reader

Before pasting the page into Systeme.io, review the copy as a buyer, a support agent, and a platform reviewer. Each role catches a different failure.

Buyer review

- Can I tell within seconds whether this is for me?
- Do I know what files or access I receive?
- Do I understand the work I still must perform?
- Can I see the price and purchase terms?
- Do the claims feel specific without sounding impossible?
- Do I know what happens after clicking the button?

Support review

- Will this language cause avoidable questions?
- Are access, download, software, and refund expectations clear?
- Does the page imply support that is not included?
- Can every promised file be located in the delivery folder?

Integrity review

- Is every proof item real and contextual?
- Is urgency documented and true?
- Does any sentence imply guaranteed money, traffic, or platform reach?
- Does the page omit an important prerequisite?
- Does the optional offer remain optional?

Red-team prompt

Red-team this sales page against the Offer Brief. Create a table with COPY EXCERPT, RISK, WHY IT MAY MISLEAD, SOURCE DECISION, and SAFER REVISION. Check promise inflation, missing effort, fake urgency, invented proof, vague deliverables, hidden conditions, refund ambiguity, unsupported comparisons, and mobile readability.

A SALES PAGE PASSES WHEN THE RIGHT BUYER CAN SAY YES WITH CLEAR EYES - AND THE WRONG BUYER CAN SAY NO WITHOUT BEING TRICKED.

Paste in Sections, Then Connect the Buttons

Build from top to bottom in controlled sections. Save after meaningful changes and preview frequently rather than completing the entire page before discovering a mobile problem.

Build sequence

1. Choose a clean template or blank layout that fits the Design Brief.
2. Set global background, typography, button, and spacing choices first.
3. Add the hero headline, subheadline, primary image, and CTA.
4. Add one approved section at a time.
5. Insert proof only where it supports the nearby claim.
6. Add prerequisites, buyer responsibility, and limitations before the final CTA.
7. Add FAQs and policy/support links.
8. Connect every purchase CTA to the live order-form URL.
9. Preview desktop and mobile.
10. Open the page in a private browser window and click every CTA.

Mobile construction rules

- Keep headline lines short enough to avoid awkward single-word wraps.
- Stack columns when side-by-side content becomes cramped.
- Use full-width buttons with readable labels where appropriate.
- Avoid screenshots whose text becomes microscopic.
- Place important CTA buttons after enough context, not every few lines.
- Check that sticky elements do not cover buttons or text.

BUTTON LABEL + DESTINATION + RESULT MUST AGREE. “Get Instant Access” should open the correct checkout, not another explanation page.

Record the sales-page URL and last-review date in the Final Funnel Record.

Remove Uncertainty at the Moment of Payment

The order form is not the place for a surprise. Reassure the buyer by repeating the essential decision: product, price, billing, delivery, support, and policy.

Current creation path

1. Inside the funnel, choose Add step.
2. Select Order form as the step type.
3. Choose a suitable template or start from scratch.
4. Open the page configuration and select Digital product as the offer type.
5. Configure the digital product resource and price plan.
6. Enable the intended payment methods in funnel settings.
7. Edit the page design and purchase summary.
8. Save and preview the live step.

Order-form content

- Product name and one-sentence outcome.
- Exact one-time or recurring price and currency.
- Concise list of included items.
- Access and delivery timing.
- Support and refund summary with policy link.
- Secure-payment reassurance without unsupported security claims.
- Only the form fields actually needed.
- A specific purchase button.

Checkout prompt

Write concise mobile order-form copy from the approved Offer Brief. Include product name, one-line promise, five-item inclusion summary, exact price placeholder, billing type, access timing, support line, refund summary, button text, and post-purchase expectation. Do not introduce a new benefit or hide a condition.

THE ORDER FORM MUST MATCH THE SALES PAGE WORD FOR WORD ON PRICE, BILLING, PRODUCT NAME, AND PRIMARY DELIVERABLES.

Tell Systeme.io What the Buyer Receives

A digital product inside Systeme.io needs a configured offer and a delivery method. The correct setup depends on whether you sell downloadable files, course access, a bundle, community access, or another supported resource.

For downloadable PDF products

1. Select Digital product on the order-form configuration.
2. Create or select the digital product used for this order.
3. Give it a clear internal name matching the Offer Brief.
4. Use the supported delivery method for the final files.
5. Create a New Sale automation that sends the customer access email.
6. Add a backup download path to the sales thank-you page when appropriate.
7. Test the links from a logged-out browser and a second device.

For course or membership delivery

- Create and publish the course or resource before expecting it in the order-form list.
- Select the correct resource and access type.
- Confirm whether access is full, partial, drip, dated, or expiring.
- Test the actual student experience, not just the owner dashboard.

Delivery decision prompt

Based on my final customer files and current Systeme.io capabilities, recommend the simplest delivery method. Compare hosted download links, thank-you-page links, email links or attachments, and course access. Evaluate recovery, file size, updates, access control, customer ease, and support burden. Use official current documentation and do not assume a feature exists.

A FILE IN YOUR ACCOUNT IS NOT DELIVERED UNTIL THE CUSTOMER CAN ACCESS IT AFTER PAYMENT AND AGAIN LATER.

Configure the Charge Exactly Once

The price plan turns the approved pricing decision into a charge. A mismatch here can create real refunds, disputes, and lost trust.

Confirm before saving

- Product and price-plan names are understandable internally.
- Currency matches the funnel currency.
- Billing is one-time, subscription, or payment plan as approved.
- Amount matches every page and email.
- Tax settings are reviewed for the seller's situation.
- Payment methods are enabled and connected.
- Access begins and ends according to the offer.
- No duplicate price plan will confuse future editing.

For a one-time digital product

1. Create or select the approved digital product.
2. Add a price plan under the product configuration.
3. Choose one-time payment.
4. Enter the approved amount and currency.
5. Save the price plan.
6. Select it for the order form.
7. Confirm the displayed checkout total.
8. Repeat the price comparison during the final test.

Price-control prompt

Create a PRICE CONSISTENCY TABLE for sales page, order form, payment processor display, receipt, optional CSI offer, refund policy, and email. Use the exact approved amount and billing type. Mark every location [TEST] until visually confirmed. Identify any tax or legal decision that requires professional review.

NEVER “TEST” BY CHANGING THE LIVE PRICE RANDOMLY. Use a documented test method and restore only from a recorded approved value.

Use an Upsell, Not a Hidden Requirement

Guide 05 defined CSI as an optional adjacent product. The main Business in a Box purchase must work completely without it.

Order bump versus one-time offer

- Order bump: A small checkbox offer shown on the order form before purchase.
- One-time offer or upsell: A separate page shown after the main purchase decision.
- Downsell: A different follow-up offer shown after declining an upsell.

Recommended decision

Use a separate CSI one-time-offer page after the main purchase. This gives enough room to explain the distinct traffic-research product and preserves a clean main checkout.

The CSI page must clarify

- The main Business in a Box purchase is already complete.
- CSI helps research searchable TikTok topics; it does not guarantee traffic.
- The add-on is a separate product with separate files and support terms.
- The checkout-session price is \$9.99 only if that condition is technically and truthfully enforced.
- The later public price is the approved normal price, currently proposed at \$19.99.
- Declining does not remove anything from the main purchase.
- Both accept and decline paths lead to the correct thank-you experience.

Architecture prompt

Compare a checkout order bump with a post-purchase one-time-offer page for the approved CSI companion product. Evaluate clarity, available explanation space, accidental purchase risk, implementation, decline path, delivery, and support. Recommend one structure without changing the approved products or prices.

OPTIONAL MEANS THE BUYER CAN SAY NO EASILY AND STILL RECEIVE EVERYTHING THEY ALREADY PURCHASED.

Build the Page Around the Adjacent Job

The CSI offer should answer one simple question: after building a product, how can a creator research topics people may already be searching for and turn those signals into relevant content angles?

Recommended page structure

1. Confirmation: Their main Business in a Box order is complete.
2. Transition: Building the product and attracting attention are different jobs.
3. CSI outcome: Learn a repeatable process for topic research and content angles.
4. Contents: State the separate files and tools included.
5. Limits: Feature access, platform change, and no guaranteed traffic.
6. Price: Show the genuine checkout-session price and approved normal price.
7. Accept: Clear button describing the additional charge.
8. Decline: Clear no-thanks link without shame or concealment.

OTO copy prompt

Write the CSI one-time-offer page using only the Companion Offer Brief. Include MAIN ORDER CONFIRMATION, TRANSITION, HEADLINE, OUTCOME, CONTENTS, WHO IT HELPS, PLATFORM LIMITATION, EXACT ONE-TIME PRICE, NORMAL PRICE CONDITION, ACCEPT BUTTON, DECLINE LINK, DELIVERY, SUPPORT, and REFUND INTERACTION. State that results depend on topic choice, content quality, audience fit, and platform distribution. Do not call it one-time unless the same price is unavailable later through that route.

THE ACCEPT BUTTON MUST DISCLOSE THAT IT ADDS A SEPARATE CHARGE. A vague “Continue” button is not enough.

DECLINE PATH

Make “No Thanks” Work Perfectly

A decline is part of the planned journey, not an error. The customer has already bought the main product and deserves the same smooth delivery whether they add CSI or not.

Decline-path requirements

- The link is visible, readable, and understandable.
- It does not use shame, guilt, or confusing double negatives.
- It does not accidentally add the offer.
- It routes to the correct sales thank-you page.
- The main purchase delivery is unchanged.
- The customer receives no CSI buyer tag or CSI delivery email.
- The Final Funnel Record documents the destination.

Accept-path requirements

- The buyer sees the exact additional charge.
- The payment succeeds once, not twice.
- The CSI buyer tag or access is applied.
- The CSI delivery email is sent.
- The thank-you page recognizes the completed journey without confusion.
- The customer can identify both purchases in receipts or account records.

Branch-test prompt

Create two complete post-purchase branch tests: ACCEPT CSI and DECLINE CSI. For each list click, expected URL, expected charge, expected tags, expected email, expected files, thank-you result, receipt, refund implications, and failure recovery. Mark every item PASS or FAIL only after observed evidence.

TEST THE DECLINE PATH WITH THE SAME SERIOUSNESS AS THE PURCHASE PATH. A broken “no” damages trust even when the main payment succeeded.

Confirm the Order and Start the Customer

The sales thank-you page should reduce post-purchase uncertainty. It confirms success, explains where access arrives, provides a backup path, and gives the customer one clear first action.

Required sections

1. Success: Confirm that the order was received.
2. Order summary: Use the supported sales thank-you order-summary element when appropriate.
3. Inbox instruction: Give sender name, expected subject, and timing.
4. Access: Provide the approved download or login path.
5. Start here: Tell the customer what to open first.
6. Support: Explain what to send if access fails without requesting sensitive information.
7. CSI note: Distinguish main files from CSI files when purchased.
8. Expectation: Explain customer-use emails and unsubscribe behavior.

Current Systeme.io note

A Sales Thank You page is different from an Opt-in Thank You page. Systeme.io's current documentation says the order-summary element can be placed on a Sales Thank You page.

Thank-you prompt

Write the sales thank-you page for the main offer. Include order confirmation, receipt expectation, inbox instructions, access button placeholder, START HERE instruction, support path, optional CSI distinction, and one next action. Do not display private payment details or imply the email is optional.

THE FIRST POST-PURCHASE QUESTION SHOULD BE ANSWERED ON THE PAGE: "WHAT DO I DO NOW?"

Create a Recoverable Access System

Delivery should not depend on one perfect email or one open browser tab. Use more than one appropriate access point and document how to update it later.

Recommended delivery layers

1. Primary: Automated customer email after a successful sale.
2. Immediate backup: Access button on the Sales Thank You page.
3. Support recovery: A documented process for verifying a purchase and resending access.
4. Update path: A stable location or replacement process when product files change.

Delivery record

- Customer-facing filename and version.
- Hosted location or system resource.
- Page and email containing the link.
- Permission or access behavior.
- Last successful logged-out test.
- Replacement procedure.
- Support response when access fails.

Customer-access prompt

Create the CUSTOMER ACCESS EMAIL from the Product Handoff and Offer Brief. Include purchase confirmation, product name, access link placeholders, START HERE file, download and device notes, included support, refund reference, broken-link instructions, and what emails follow. Keep sales copy secondary to delivery.

File update rule

If you replace a product file later, confirm whether the existing customer link still works. Record the new version and test the buyer path before announcing the update.

A CUSTOMER SHOULD NOT HAVE TO PROVE YOUR AUTOMATION FAILED BEFORE YOU HELP THEM RECOVER ACCESS.

Build a Helpful Sequence, Not a 100-Email Trap

A campaign is an ordered series of emails. It is not automatically one “campaign” just because the emails share a topic; inside the platform, the configured campaign is the container and the emails are scheduled messages within it.

Start small

1. Email 1 - Delivery: Send the promised free guides immediately.
2. Email 2 - First action: Help them choose one audience problem.
3. Email 3 - Mistake: Explain why building before validating creates waste.
4. Email 4 - Process: Show the product-building path at a high level.
5. Email 5 - Offer: Introduce Business in a Box and who it is for.
6. Email 6 - Objection: Address time, skill, or tool concerns honestly.
7. Email 7 - Decision: Summarize fit, limitations, and next step.

Campaign rules

- Each email must deliver one useful idea even if the reader never purchases.
- Delay timing should respect the promise and avoid a sudden message pile.
- A buyer should not continue receiving “buy now” emails for something already purchased.
- Every email needs sender identity and unsubscribe support.
- Do not build 100 emails before learning whether the first seven help anyone.

Campaign prompt

Create a seven-email lead campaign from the free guide to the approved Business in a Box offer. For each email provide PURPOSE, SEND DELAY, SUBJECT, PREVIEW TEXT, BODY OUTLINE, ONE USEFUL TAKEAWAY, CTA, BUYER-SUPPRESSION RULE, and CLAIMS TO VERIFY. Do not write artificial daily emergencies.

THE GOAL IS NOT TO OUTLAST THE READER. The goal is to be useful long enough that the right buyer trusts the next step.

Keep Delivery, Teaching, and Selling Distinct

An email can teach and sell in the same sequence, but the reader should always understand the primary purpose. Do not bury a required access link beneath a long promotion.

Three email modes

- Delivery: Put the promised access first and reduce friction.
- Teaching: Give one focused insight and one action.
- Decision: Explain the offer, fit, effort, limitations, and CTA.

Email-writing prompt

Write the approved campaign one email at a time in Mr. Mike's honest, direct voice. Before each draft, repeat EMAIL PURPOSE, READER STATE, PREVIOUS EMAIL, NEXT EMAIL, APPROVED CLAIMS, and CTA. Then provide SUBJECT, PREVIEW TEXT, BODY, LINK PLACEHOLDER, P.S. only if useful, and a SELF-CHECK. Keep paragraphs short for mobile. Do not invent personal stories, results, urgency, or reader emotions. Wait for approval before writing the next email.

Quality check

- The subject accurately describes the message.
- The sender identity is recognizable.
- The opening does not waste three paragraphs.
- There is one primary idea and one primary CTA.
- Links use descriptive words instead of "click here" when possible.
- The message still makes sense without images.
- The unsubscribe path is present and functional.
- A buyer is excluded from unnecessary sales reminders.

Current test-email caution

Systeme.io's current help center notes that test emails may not populate substitution variables and that emails created directly inside rules or workflows may not support test sending. Use a separate test address and run a real subscribed path to inspect the final result.

Label Customer State Without Creating a Junk Drawer

Tags help automations recognize what happened. They should describe meaningful business states, not every tiny click.

Recommended tag set

- LEAD - Monetization Guide: Requested the free guides.
- CUSTOMER - Business in a Box: Completed the main purchase.
- CUSTOMER - CSI: Purchased the CSI companion offer.
- REFUND - Business in a Box: Main purchase refunded when needed.
- REFUND - CSI: CSI purchase refunded when needed.
- SUPPORT - Access Issue: Optional internal state if you truly use it.

Naming rules

- Use a consistent category prefix.
- Name the exact product or action.
- Avoid duplicate tags with slightly different spelling.
- Document which automation adds and removes each tag.
- Do not infer sensitive traits or collect data you do not need.
- Do not use a tag as the only proof that payment succeeded.

Tag map prompt

Create a TAG GOVERNANCE TABLE with TAG NAME, BUSINESS MEANING, ADDED WHEN, REMOVED WHEN, AUTOMATION, EMAIL EFFECT, DELIVERY EFFECT, REFUND EFFECT, and TEST. Use the smallest useful tag set. Flag duplicate or ambiguous names.

Buyer suppression

When CUSTOMER - Business in a Box is applied, stop or bypass lead emails whose main purpose is selling Business in a Box. Replace them with customer-use messages when appropriate.

TAGS DESCRIBE STATE. THEY DO NOT REPLACE PAYMENT RECORDS, CONSENT RECORDS, OR HUMAN REVIEW.

Connect the Trigger to the Correct Action

An automation begins with a trigger and performs one or more actions. Build only what you can explain and test.

Lead automation

- Trigger: Funnel form subscribed on the free-guide opt-in page.
- Actions: Add the lead tag and subscribe the contact to the approved lead campaign.
- Result: Delivery email begins and the contact enters the education sequence.

Customer automation

- Trigger: New sale for Business in a Box.
- Actions: Add customer tag, send access, and stop or bypass inappropriate sales emails.
- Result: The buyer receives the main product and correct follow-up.

CSI automation

- Trigger: New sale for the CSI offer.
- Actions: Add CSI customer tag and send CSI access.
- Result: Only accepting customers receive the add-on.

Build prompt

Using the funnel map and current Systeme.io documentation, write each automation as TRIGGER, CONDITIONS, ACTIONS IN ORDER, TAG CHANGES, CAMPAIGN CHANGES, DELIVERY, FAILURE ALERT, and TEST. Keep separate product purchases distinguishable. Do not claim the free plan can support more rules or workflows than the current plan allows.

CURRENT SYSTEME.IO PATHS MAY OFFER RULES OR WORKFLOWS. Choose the simplest supported method that fits the account limit, then document the exact build used.

After saving, subscribe and purchase with a dedicated test address. Dashboard configuration alone is not proof that the automation runs.

Put Important Terms Where Buyers Can Find Them

A policy is not useful when it exists only in your notes. Buyers need accessible, understandable information before and after purchase.

Pages or statements to review

- Privacy notice explaining what information is collected and why.
- Terms governing product use, account access, and prohibited redistribution.
- Refund policy matching the approved offer and actual process.
- Earnings or results disclaimer when the product discusses monetization.
- Affiliate disclosure wherever compensated recommendations appear.
- Contact or support information.
- Accessibility and jurisdiction-specific requirements when applicable.

Support system

1. Choose one monitored support email.
2. State expected response time you can realistically maintain.
3. Create response templates for access, duplicate charge, refund, and file questions.
4. Never ask a customer to email full payment credentials.
5. Verify purchase using safe identifiers available in the platform.
6. Record changes that affect future customers.

Policy drafting prompt

Create a POLICY AND SUPPORT REQUIREMENTS LIST from my offer, location, buyer locations, delivery, refund decision, email collection, analytics, affiliate links, and payment providers. Separate PLAIN-LANGUAGE PAGE COPY from ITEMS FOR QUALIFIED LEGAL OR TAX REVIEW. Do not present generated text as legal advice or claim universal compliance.

CHATGPT CAN ORGANIZE QUESTIONS AND DRAFT PLAIN LANGUAGE. It cannot determine every legal, privacy, tax, accessibility, or consumer-protection duty for your situation.

Measure the Journey Without Collecting Everything

Tracking should answer operational questions: Are people reaching the page? Are forms working? Are buyers completing payment? Are emails and files arriving? Do not add tools merely because a template includes them.

Minimum launch measures

- Visits to the opt-in and sales pages.
- Completed opt-ins.
- Sales-page to order-form clicks.
- Completed main purchases.
- CSI accepts and declines.
- Delivery email success and link failures.
- Refunds, disputes, and access-support requests.
- Mobile versus desktop problems observed during testing.

Simple formulas

- Opt-in rate: Completed opt-ins divided by unique opt-in-page visitors.
- Checkout completion: Completed purchases divided by initiated checkouts when that data is available.
- CSI acceptance: CSI purchases divided by eligible main purchases.
- Refund rate: Refunded purchases divided by completed purchases for the same period.

Tracking-plan prompt

Create a MINIMUM VIABLE FUNNEL SCORECARD. For each metric list definition, numerator, denominator, data source, review frequency, privacy consideration, and decision it may support. Separate observed facts from interpretation. Do not recommend invasive tracking or claim causation from small samples.

A SMALL NUMBER IS INFORMATION, NOT A VERDICT. Fix broken mechanics first, then collect enough evidence before rebuilding the entire offer.

Record measurement definitions in the Final Funnel Record so future comparisons use the same denominator.

Test Every Branch Before Sending Real Traffic

Testing is a customer simulation. Use dedicated test addresses, private browser windows, multiple devices when possible, and a written record.

Core scenarios

1. New visitor submits the free-guide form.
2. Existing contact submits the form again.
3. Lead opens both guide links from email.
4. Visitor moves from sales page to order form.
5. Main payment succeeds and CSI is accepted.
6. Main payment succeeds and CSI is declined.
7. Payment fails or is abandoned.
8. Customer opens access from email and thank-you page.
9. Customer uses a phone with a narrow screen.
10. Customer requests a refund or reports a broken link.

For every test record

- Date, device, browser, test email, and starting URL.
- Exact steps performed.
- Expected page, tag, charge, email, and delivery.
- Actual result.
- Screenshot or receipt reference without exposed sensitive data.
- PASS, FAIL, or BLOCKED.
- Owner, fix, retest date, and final evidence.

Matrix prompt

Create a complete funnel test matrix from the approved map. Include TEST ID, PERSONA, START STATE, STEPS, EXPECTED URL, EXPECTED CHARGE, TAGS, EMAILS, FILES, MOBILE CHECK, PRIVACY CHECK, RESULT, EVIDENCE, FIX, and RETEST. Include both accepted and declined CSI paths.

DO NOT FIX AND FORGET. Every failed scenario must be rerun from the beginning after the change.

Use a Real Transaction Path and Verify the Refund

Last reviewed October 17, 2026: Systeme.io's current help article states that Stripe test purchases are not performed through a special test mode in this workflow. It instructs sellers to make a purchase and then refund it from Systeme.io transactions. Verify current guidance before testing.

Controlled purchase test

1. Use a dedicated buyer email address.
2. Open the live order form in a private browser window.
3. Confirm product, amount, currency, and billing before paying.
4. Complete the main purchase.
5. Run either the CSI accept or decline path.
6. Capture the customer-visible receipt and thank-you result.
7. Confirm the transaction appears in the seller dashboard.
8. Confirm every expected tag, email, link, and file.
9. Issue the refund using the documented transaction process when appropriate.
10. Confirm refund status and any access or tag changes.

Second pass

- Repeat the opposite CSI branch.
- Use a second payment method only if needed and safe.
- Verify duplicate purchase behavior.
- Check the support response and resend procedure.
- Record processor fees or non-refundable costs observed during testing.

A SUCCESSFUL CHARGE IS ONLY ONE PART OF THE TEST. Delivery, tags, email, receipts, decline routing, refunds, and customer recovery all must work.

Never use a real customer as the first test purchase.

Review the Funnel Like a TikTok Visitor

Most TikTok visitors will arrive on a phone. The funnel must work with one hand, a small screen, variable connection speed, and a distracted reader.

Inspect every page

- Headline is fully visible and does not run off-screen.
- Body text is readable without pinching or zooming.
- Buttons are large enough to tap and not covered by other elements.
- Forms show the correct keyboard and understandable validation.
- Images load, crop correctly, and do not contain microscopic text.
- Columns stack in the correct order.
- Price and billing remain visible near purchase action.
- Policy and decline links are readable.
- Downloads open or save correctly on iPhone and Android when possible.
- Email links return to the intended page or file.

Speed and focus

- Compress oversized images.
- Remove decorative sections that delay the decision.
- Avoid background video when it harms load time or readability.
- Keep popups from blocking the promised content.
- Test on cellular data as well as Wi-Fi when practical.

Mobile audit prompt

Give me a page-by-page MOBILE QA checklist for this funnel. I will report what I see; ask one observation at a time. Record PASS, FAIL, or VERIFY for layout, text, image, form, button, price, policy, download, email link, and load behavior. Do not mark a page passed from the editor preview alone.

THE MOBILE SCREENSHOT IS EVIDENCE OF APPEARANCE. THE REAL PHONE TEST IS EVIDENCE OF FUNCTION.

Know What to Do When the Funnel Breaks

A launch plan needs recovery instructions because links expire, files move, payment connections fail, emails bounce, and platform interfaces change.

Common failure paths

- No delivery email: Check transaction, trigger, action, sender status, suppression, and recipient spam folder.
- Broken file link: Confirm the hosted file exists, permission allows customer access, and the link works logged out.
- Wrong price: Pause traffic, verify the approved Offer Brief, correct every display and plan, then retest.
- Duplicate charge: Verify transactions and follow the provider and refund process promptly.
- CSI delivered after decline: Inspect branch order, product trigger, tags, and delivery action.
- Buyer receives sales emails: Inspect customer tag and campaign suppression logic.
- Page button fails: Verify action type, destination URL, page status, and device behavior.
- Domain email fails: Recheck sender confirmation, authentication status, DNS, and current documentation.

Troubleshooting prompt

Help me troubleshoot one funnel failure without changing unrelated parts. Ask for the expected result, actual result, exact step, page or automation name, test state, and non-sensitive evidence. Build a hypothesis list ordered from simplest to riskiest. Change one variable at a time. After each change, give a clean retest from the original starting state and update the issue log.

PAUSE TRAFFIC WHEN MONEY, ACCESS, PRIVACY, OR MISLEADING COPY IS INVOLVED. Do not leave a known harmful failure live while experimenting.

Open the Door Without Losing Control

Launch is not the moment you stop checking. It is the controlled transition from test traffic to real visitors.

Final pre-launch checklist

- Offer Brief and Product Handoff still match the live funnel.
- All page URLs and step types are correct.
- Every CTA and decline link reaches the intended destination.
- Product, price, currency, billing, taxes note, and policies agree.
- Payment gateway is connected and the intended methods appear.
- Main and CSI delivery paths pass.
- Lead, buyer, and CSI tags behave correctly.
- Campaign timing and buyer suppression pass.
- Sender identity and domain status are confirmed.
- Desktop and mobile pages pass.
- A real purchase and refund path has been verified.
- Support inbox is monitored and response templates exist.
- Analytics definitions and issue log are ready.
- The Final Funnel Record is saved.

Soft launch

1. Send the funnel to a small controlled audience or trusted tester.
2. Watch access, support, and payment behavior.
3. Fix functional failures before interpreting conversion performance.
4. Collect repeated questions and clarify the page or email.
5. Increase traffic only after the system remains stable.

DO NOT CELEBRATE THE FIRST SALE BY IMMEDIATELY REBUILDING THE FUNNEL. Deliver well, observe, and change only what evidence supports.

Create the Record That Makes the Funnel Maintainable

The Final Funnel Record prevents future confusion. It tells you what is live, why it exists, how it connects, and when it was last tested.

Required sections

- Funnel name, account owner, product, version, and launch date.
- Offer Brief and Product Handoff source filenames.
- Page sequence, page types, live URLs, and button destinations.
- Product resources, customer filenames, access, and update procedure.
- Main and CSI prices, currencies, billing types, and payment methods.
- Payment-gateway status without sensitive account data.
- Tags, campaigns, rules or workflows, triggers, actions, and suppression.
- Sender name, sender address, reply-to, and domain-status date.
- Registrar, renewal date, website DNS, email DNS, forwarding, SSL, and last domain test when used.
- Policy, support, refund, and disclaimer links.
- Tracking definitions and dashboard locations.
- Test matrix results, known limitations, unresolved items, and retest dates.
- Free-plan usage, current limits, and upgrade trigger.
- Rollback, pause-traffic, broken-link, and access-recovery procedures.

Final record prompt

Create the FINAL FUNNEL RECORD using only observed and approved information from this chat. Do not infer a passed test. Mark each item LIVE, DRAFT, PASS, FAIL, BLOCKED, or VERIFY. Include the complete page map, URL map, button map, product delivery map, payment configuration, tags, campaign, automations, policies, support, tracking, test evidence, failure recovery, plan limits, and last-reviewed dates. End with a FUNNEL CONTEXT CAPSULE for future maintenance.

SAVE AS FINAL_Funnel_Record_[Product_Name]_[Date] in 07 - SALES AND CONTENT. Keep the test matrix and issue evidence in 06 - FUNNEL ASSETS/06 - TESTING.

You Built a Customer Journey - Not Just a Page

You started with an approved offer and built the system that turns attention into permission, a buying decision, secure payment, accurate delivery, useful follow-up, and recoverable support.

Completion checklist

- The Funnel Studio is named 05 - FUNNEL STUDIO - [SHORT PRODUCT NAME].
- The customer journey and every branch are documented.
- The current plan has enough capacity for the build.
- The custom domain, root forwarding, SSL, support inbox, and authenticated sender are tested when used.
- Account, sender, support, payment, and business settings are reviewed.
- Free-guide opt-in, thank-you, and delivery work.
- The sales page and order form match the Offer Brief.
- The main product resource, price plan, and access work.
- The CSI offer is optional, clear, separately delivered, and truthfully priced.
- Accept and decline paths both reach the correct completion state.
- Lead, buyer, and CSI tags, emails, policies, and support behave correctly.
- Desktop, mobile, purchase, refund, delivery, and recovery tests pass.
- The Final Funnel Record and Funnel Context Capsule are saved.

THE SYSTEM IS NOT FINISHED BECAUSE IT LOOKS GOOD. It is finished when the right person can move through it, understand it, pay correctly, receive everything promised, and recover when something goes wrong.

What comes next

Guide 07 turns the finished system into a repeatable content and traffic plan without rebuilding the funnel every morning.

NEXT: GUIDE 07 - BUILD THE TRAFFIC, CONTENT, AND GROWTH SYSTEM

Verify Registrar and Domain Instructions Before Launch

Domain prices, interfaces, DNS instructions, and email services can change. The domain workflow in this guide was reviewed against official provider documentation on October 17, 2026. Recheck the current pages whenever the interface differs.

Official Porkbun references

- Register a domain:
<https://kb.porkbun.com/article/212-how-to-register-a-domain-at-porkbun>
- Domain pricing: <https://kb.porkbun.com/article/266-how-does-domain-pricing-work>
- Email forwarding:
<https://kb.porkbun.com/article/10-how-to-set-up-email-forwarding-service>
- Hosted email versus forwarding:
<https://kb.porkbun.com/article/67-hosted-email-vs-email-forwarding>
- URL forwarding: <https://kb.porkbun.com/article/39-how-to-set-up-url-forwarding>
- Free SSL: <https://kb.porkbun.com/article/71-how-your-free-ssl-certificate-works>
- Fix email MX records:
<https://kb.porkbun.com/article/222-how-to-fix-your-porkbun-mx-records>

Official Systeme.io references

- Set a funnel page as the domain root: <https://help.systeme.io/article/143-how-to-define-a-blog-or-a-page-created-with-systeme-io-as-your-domain-root>
- Change a funnel domain:
<https://help.systeme.io/article/345-how-to-change-the-domain-name-of-a-funnel>
- Authenticate a personal domain:
<https://help.systeme.io/article/316-how-to-authenticate-your-personal-domain-name>

NEVER COPY SAMPLE DNS VALUES INTO A LIVE DOMAIN. Use provider-generated account values and preserve unrelated records until their purpose is understood.

Verify Moving Platform Instructions Before Launch

Platform interfaces, prices, limits, and policies change. The operational statements in this guide were reviewed against current official Systeme.io pages on October 17, 2026. Recheck them whenever the interface differs or before a major launch.

Official references used

- Pricing: <https://systeme.io/pricing>
- Create a funnel: <https://help.systeme.io/article/147-how-to-create-a-funnel>
- Create an opt-in page:
<https://help.systeme.io/article/152-how-to-create-a-opt-in-page>
- Configure a button: <https://help.systeme.io/article/170-how-to-set-up-a-button>
- Add a downloadable file:
<https://help.systeme.io/article/340-how-to-add-a-downloadable-file>
- Create an order form:
<https://help.systeme.io/article/252-how-to-create-an-order-form-payment-page>
- Create a price plan:
<https://help.systeme.io/article/153-how-to-create-and-configure-a-price-plan>
- Sell an eBook: <https://help.systeme.io/article/155-how-to-sell-your-ebook>
- Send a file after sale: <https://help.systeme.io/article/294-how-to-send-an-automatic-email-containing-a-file-after-the-sale>
- Connect funnel pages:
<https://help.systeme.io/article/330-how-to-link-between-the-pages-of-a-funnel>
- Create upsell/downsell:
<https://help.systeme.io/article/243-how-to-create-an-upsell-and-a-downsell>
- Create thank-you page:
<https://help.systeme.io/article/321-how-to-create-a-thank-you-page>
- Integrate PayPal: <https://help.systeme.io/article/132-paypal-integration>
- Connect Stripe or PayPal:
<https://help.systeme.io/article/307-how-to-activate-payments-by-stripe-or-paypal>
- Test purchase: <https://help.systeme.io/article/151-how-to-make-a-test-purchase>
- Refund a customer: <https://help.systeme.io/article/259-how-to-refund-a-customer>
- Create a tag: <https://help.systeme.io/article/303-how-to-create-a-tag>
- Automation rules: <https://help.systeme.io/article/140-automation-rules>

- Create campaign:
<https://help.systeme.io/article/367-how-to-set-up-an-email-campaign>
- Automate campaign: <https://help.systeme.io/article/284-how-to-automate-the-sending-of-a-series-of-emails-campaign>
- Confirm sender:
<https://help.systeme.io/article/2070-how-to-confirm-your-email-sender-address>
- Authenticate domain:
<https://help.systeme.io/article/316-how-to-authenticate-your-personal-domain-name>

If the interface no longer matches

1. Confirm you are in the correct Systeme.io account and correct funnel.
2. Search the official Help Center using the task name shown on this card.
3. Compare the article update date with the date on this guide.
4. Do not substitute a similarly named page type, trigger, action, or payment setting.
5. Record the changed label and successful path in the Final Funnel Record.
6. Update this guide before giving the changed instruction to a customer.

WHEN A LABEL OR LIMIT CHANGES, UPDATE THE FINAL FUNNEL RECORD. Do not silently teach an old interface as if the user made a mistake.