

Using the 'Funnel Creation' options inside of the business center will get your funnel set up in no time. However, there will always be some fine-tuning and tweaking that needs to be done on your end to finalize them and customize the pages and actions to YOU. The checklist below can be used as a reminder of what to check for before you publish and start sharing your new funnel!

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## CAPTURE PAGE SETTINGS

### CONFIRM POPUP FORM BUTTON ACTION

On your capture page, make sure that the call to action button pops open the optin form (*if you are using a 'two-step' optin template*). If not, just confirm that the form is immediately visible when the page loads.

### ADD YOUR FORM INTEGRATIONS

Form integrations are what tells the system what to do with the lead information after someone opts in. These will be different for everyone and will typically include your autoresponder or, at the very least, your MLSP CRM so you do in-fact capture the lead data.

### CONFIRM YOUR FORM ACTION (CONNECT YOUR FUNNEL PAGES)

You want to make sure that what happens to the user after they opt in is correct. This means making sure the 'Action' setting for the form is set to send the user to the thank you page (or wherever else you need them to go next)

### CUSTOMIZE YOUR PAGE SETTINGS

Click on the 'Page Settings' tab on the right hand side. Here is where you will fill in the page title, description, and upload a share image. This is very important, as **this is the information that social media sites will use to create page previews when your links are shared!**

## THANK YOU PAGE SETTINGS

### CONFIRM BUTTON ACTIONS/CALENDAR EMBED

Depending on the page template, as well as how you are delivering what your user opted in for, you may have one or more 'call to action' buttons, a place to embed a booking calendar, or any number of options on this page. Confirm that they are set to send the user where they should. Bottom line, make sure the thank you page does exactly what it is intended to do.

### CONFIRM THE USER WILL RECEIVE WHAT THEY OPTED IN FOR

**This is critically important!** Depending on how you are delivering what the user originally opted in for, this could be different for each funnel. If you are not delivering their training/give-away via email (an autoresponder), you'll need to make sure they have a way to download it on this thank you page. If you are using an autoresponder, make sure the list is set up correctly, and that the first email that is sent to them contains a link or some way for them to download/access the training.

### CUSTOMIZE YOUR PAGE SETTINGS

Click on the 'Page Settings' tab in the sidebar control panel. Make sure you edit the SEO Settings. This is where you will fill in the page title, description, and upload a share image. This is very important, as **this is the information that social media sites will use to create page previews when your links are shared!**

### PUBLISH & TEST... THEN TEST AGAIN

Publish your funnel and then be sure to test it. **FULLY TEST IT.** Opt-in with a new email address. Make sure that the funnel works as it should. If you implemented an autoresponder, make sure the lead got put on the right list, and that the initial email got sent out. Also make sure that the lead data got added to whatever integrations you set up with your form!



***WE CAN NOT STRESS THIS ENOUGH. TEST YOUR FUNNEL TO MAKE SURE IT WORKS PROPERLY & IT PROVIDES A GREAT USER EXPERIENCE FOR YOUR LEAD***