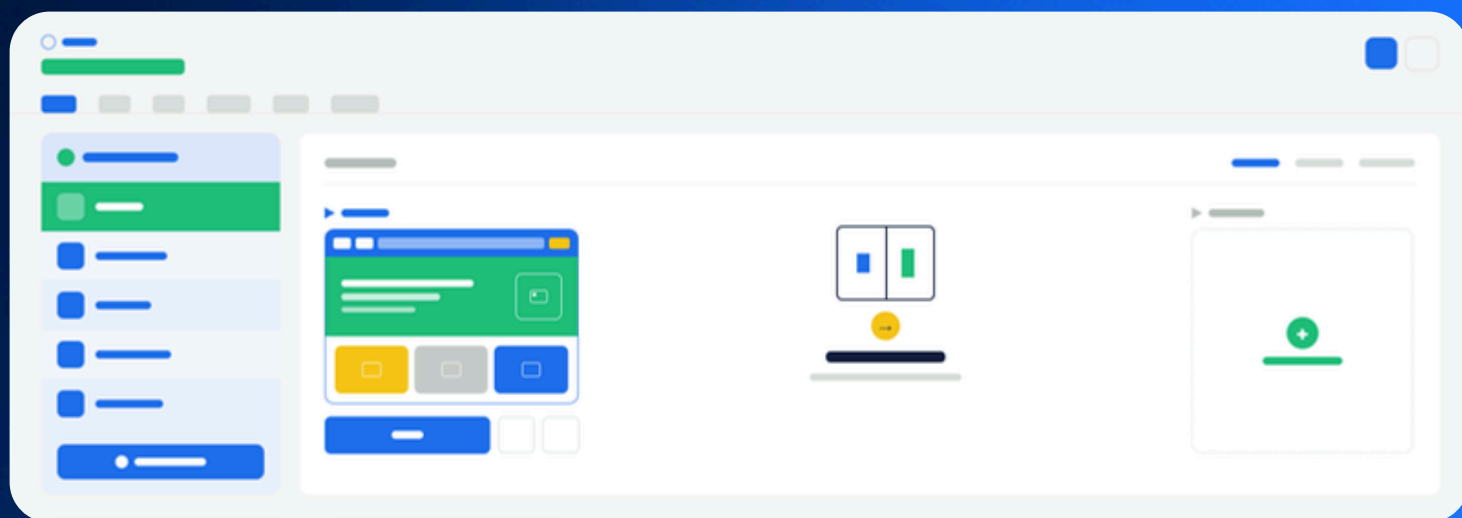


REFERENCE GUIDE

Funnels

Your complete funnel building companion



The Funnels List and Tabs

What It Is

A funnel is a chain of pages, called steps, that moves a visitor from one page to the next. Your funnel list holds every funnel, and each funnel has a Steps list and tabs.

How It Works For Your Business

- Search for Funnels to see your list.
- Look for the New funnel button near the top to start a new one.
- Use the three-dot menu on a funnel to look for Edit, Clone, Share, and Delete.
- Inside a funnel, the Steps list shows pages in the order visitors see them.
- Look for tabs such as Overview, Products, Settings, and Stats across the top.

The Funnels List and Tabs – Tips & Guidelines

Tips

- Click through every tab once just to learn where things live.
- Use folders, if offered, to group funnels by client or offer.
- Name funnels clearly so a long list stays easy to scan.
- Click Edit on a step to open the page builder, then close it to return.

DO

- Click through each tab first
- Name funnels clearly
- Use folders to group
- Learn the Steps list

DON'T

- Click Delete without thinking
- Name a funnel Funnel 1
- Change settings while touring
- Ignore the Stats tab

Creating from Template or Blank

What It Is

Every new funnel starts at New funnel. A template gives you ready-made steps and a layout. Blank gives you an empty funnel to build yourself.

How It Works For Your Business

- Click New funnel and look for From Templates or From Blank.
- From Templates opens a library. Look for a preview option before you choose.
- Select a template, type a clear funnel name, then click the create button.
- From Blank follows the same flow and drops you into an empty funnel.
- Check the Steps list afterward to see which steps were created for you.

Creating from Template or Blank – Tips & Guidelines

Tips

- If you are unsure, start from a template. It is easier to edit than to invent.
- Use a name you will recognize in a list three months from now.
- Preview a step before you edit it to see the headline, layout, and button.
- Templates include sample words and pictures, so swap in your own.

DO

- Start from a template if unsure
- Name the funnel clearly
- Preview before editing
- Replace all sample content

DON'T

- Publish a template as is
- Skip the funnel name
- Pick a template and never look
- Build from blank every time

Steps, Paths and Order

What It Is

Each step is one page with its own name and page path. The order of the Steps list is the order visitors move through, so adding and ordering steps correctly matters.

How It Works For Your Business

- Click Add New Step, type a step name, and type a page path.
- Choose a ready-made step template or start blank, then click the create button.
- Drag a step to a new spot, then read the confirmation pop-up before you confirm.
- Nested paths like /offer/checkout group pages. They are marked Beta, so confirm in your account.
- Look in a step's three-dot menu for options like clone, delete, and move to another funnel.

Steps, Paths and Order – Tips & Guidelines

Tips

- Keep paths short and lowercase, with hyphens instead of spaces.
- Make the path match the page's job, like thank-you for a thank-you page.
- Clone a funnel before changing one that is live.
- Confirm the step menu options on screen, since help articles do not list them.

DO

- Use short lowercase paths
- Match the path to the job
- Confirm the order pop-up
- Practice on a copy

DON'T

- Use spaces in a path
- Put thank-you before opt-in
- Click through the order pop-up
- Delete on a live funnel

Opt-In Forms and Next Step

What It Is

An opt-in step collects a visitor's details with a form. The submit setting decides where the visitor goes next, so they know it worked.

How It Works For Your Business

- In the builder, click the + icon, open Elements, and drag the Form element onto your page.
- Use the form picker to choose an existing form or create a new one.
- Look for an Edit form button to change fields. Look for Save in the top right of the pop-up.
- Click the form and look for the submit setting. Choose the option that sends visitors to the Next Step.
- Click Save for a draft, Preview to test with your own email, then Publish to go live.

Opt-In Forms and Next Step – Tips & Guidelines

Tips

- Ask only for what you need, because fewer fields mean more sign-ups.
- Reuse an existing form from the picker when its fields already fit.
- Search for Forms, then open Submissions to find your test entry.
- Confirm the Next Step label on screen, since wording can differ.

DO

- Test with your own email
- Set submit to Next Step
- Reuse a good form
- Check Submissions

DON'T

- Ask for every detail
- Skip the submit setting
- Publish before testing
- Put thank-you above opt-in

Funnel Settings and Domains

What It Is

The Settings tab holds the funnel name, domain, home step, favicon, and tracking code. Domains are added once (search for Domains), then attached to each funnel.

How It Works For Your Business

- In a funnel, click Settings and look for the name, Domain dropdown, home step, favicon, and head and body tracking boxes.
- Search for Domains and click Connect a domain. Use a root domain or a subdomain.
- Turn on Also add www, click Continue, then Authorize if your provider is supported.
- Wait up to 30 seconds, then pick the domain in the funnel Settings and save.
- Edit a step's path with its Edit button or gear icon, publish, and open the live link in a new tab.

Funnel Settings and Domains – Tips & Guidelines

Tips

- You must buy the domain somewhere else first.
- If your provider is not supported, look for instructions to add records by hand.
- After a domain change, wait a few minutes and refresh before worrying.
- If Publish asks you to attach a domain, add one and try again.

DO

- Turn on Also add www
- Pick your home step
- Test the live link
- Wait after domain changes

DON'T

- Skip saving settings
- Assume any provider works
- Panic if it loads slowly
- Forget the step path

Products and Order Forms

What It Is

The Products tab attaches the things you sell to a checkout step. Order form elements collect payment details and can be one step or two steps.

How It Works For Your Business

- Open the checkout step, click the Products tab, then + Add Product, and pick a product and price.
- Look for Product Name Override and Price Display Override to change what visitors see.
- Look under additional options for Allow multiple quantity, Max per order, and Main versus Bump.
- In the builder, add an Order element and choose One Step Order or Two-Step Order.
- Look for toggles like cart mode, Order Bump, and Coupon Codes, then test with Preview.

Products and Order Forms – Tips & Guidelines

Tips

- Make sure a Stripe plan shows in your funnel products before blaming the page.
- Use the display overrides to show clearer names without changing the product.
- Run a test purchase in Preview before you publish.
- Set button, text, and background colors so the order form is easy to read.

DO

- Pick the right product and price
- Test a purchase
- Use clear names
- Check the Stripe plan

DON'T

- Publish without testing
- Guess which price shows
- Leave the button unclear
- Skip the cart toggles

Tracking Codes, Cloning and Sharing

What It Is

Tracking code sends visitor data to ad and analytics tools. Cloning copies steps and funnels, and share links let you pass a funnel to someone else.

How It Works For Your Business

- In funnel Settings, paste head or body code to run it on every step.
- Look for a tracking box in a single step's page settings to run code on only that page.
- Cloning a step does not copy its tracking code, so add it again afterward.
- Use a funnel's three-dot menu to look for Clone, then name it, choose a location, and confirm.
- Look for Share on a funnel to make a link. After an import, reconnect forms and products.

Tracking Codes, Cloning and Sharing – Tips & Guidelines

Tips

- Paste the code, click Save, then check with Preview.
- Use funnel-level code for every step and step-level code for one page.
- Re-add tracking after you clone a step.
- Check each imported step for forms and products that need reconnecting.

DO

- Save after pasting code
- Re-add code after cloning
- Reconnect forms and products
- Test after an import

DON'T

- Paste code twice
- Assume clone copies code
- Share a funnel unchecked
- Skip the preview check

Split Testing and Stats

What It Is

Split testing shows two versions of a step to visitors and compares them. The Stats tab and analytics show views, opt-ins, and sales so you can see what works.

How It Works For Your Business

- On a step, look for Create Variation, then pick how to create it.
- Use the traffic slider to split visitors between Control and Variation, then click Start Split Test.
- Use the gear icon under Control and Variation to set each path. A domain is required.
- In the Stats tab, look for views, opt-ins, and sales with a date range dropdown.
- Use the dropdown to compare Control and Variation, then end the test by declaring a winner.

Split Testing and Stats – Tips & Guidelines

Tips

- Change one thing at a time so you know what made the difference.
- Let the test run long enough to collect real visits.
- Search for Funnels and look for Analytics for deeper views.
- Use page view triggers to start a workflow when a step is viewed.

DO

- Test one change at a time
- Attach a domain first
- Compare Control to Variation
- Declare a winner

DON'T

- Change many things at once
- End a test too early
- Ignore the date range
- Forget to apply the winner

Redirects, 404 Steps and Errors

What It Is

Redirects send an old path to a new place. A 404 step shows a friendly page when a link is broken. Some post-purchase errors have simple fixes.

How It Works For Your Business

- Search for URL Redirect, then click + Add Redirect.
- Point an old path to the funnel step you want visitors to reach.
- Search for Domains, look for Manage and an option to set a default 404 or error page.
- Use a funnel step as your 404 page so visitors see something helpful.
- If visitors see an error page after a purchase, look in the help article for the fix and check indexing.

Redirects, 404 Steps and Errors – Tips & Guidelines

Tips

- Add a redirect whenever you rename or move a page path.
- Keep your 404 page short with one clear link back to a main page.
- Test the old link in a new tab after you add a redirect.
- If a page does not show in search, check the URL indexing guide.

DO

- Redirect old paths
- Make a helpful 404 page
- Test every redirect
- Check indexing

DON'T

- Leave old links broken
- Make a blank 404 page
- Skip the test
- Guess at purchase errors

Key Terms Glossary

Funnel

A chain of pages that moves a visitor from step to step.

Step

One page inside a funnel.

Steps list

The pages of a funnel in the order visitors see them.

Page builder

The editor where you design each page.

Template

A funnel already built for you to edit.

Page path

The end of a page's web address.

Nested path

A path with a slash in the middle, like /offer/checkout.

Form element

The builder item that collects visitor details.

Next Step

A submit choice that sends visitors to the following page.

Favicon

The tiny icon shown in the browser tab.

Tracking code

A snippet from an ad or analytics tool.

Split test

Two versions of a step shown to compare results.

Getting Help

Your software changes over time, so button names, tab names, and menus may look a little different from this guide. If something does not match, open the in-app help for Funnels and search for the feature name to see the latest steps.