1. **Create project + map all icons**
2. **Setup tracking on pages**
    2.1. Add Funnelytics to Google Tag Manager
        2.1.1. Don't forget to hit submit so there are no unsaved workspace changes
    2.2. Add Google Tag Manager to Website (ThriveCart/ClickFunnels/WordPress)
    2.3. Verify the analytics project ID is loading on EACH page
        2.3.1. Go to URL
        2.3.2. Open Dev Tools → Console
        2.3.3. Type: funnelytics.project
        2.3.4. Verify project id is the same
        2.3.5. Add URL to Funnelytics Mapping
            2.3.5.1. Don't capture anything after the query (?)
            2.3.5.2. If a URL includes a randomly generated string (like a thank you page) that is unique for the purchase/action, then use a wildcard (*) at the end of the link
        2.3.6. Click icon to generate the screenshot
        2.3.7. Repeat for each page
    2.4. Verify Session ID
        2.4.1. Go to URL
        2.4.2. Open Dev Tools → Console
        2.4.3. Type: funnelytics.session
        2.4.4. Verify project session is the same from page to page
            2.4.4.1. If the same, do nothing.
            2.4.4.2. If not, go to project dashboard → Settings
                2.4.4.2.1. Add the domains to the Cross-Domain Whitelist
                    2.4.4.2.1.1. Only need to add the top-level domain (i.e. don't need '/apply')
                2.4.4.2.2. Go back and verify that the session ID stays the same
    2.5. Optional: Test
        2.5.1. Project dashboard → Settings → Click Reset Statistics (IP Blacklist)
        2.5.2. Setup tracking parameter under Funnelytics Tracking Settings and use the generated URL
        2.5.3. Go to that URL in incognito
        2.5.4. Test the session along the way
        2.5.5. Turn the Numbers Layer On and should see the full path we just took
3. **Set up traffic sources**
    3.1. Method #1: Via Funnelytics Settings
        3.1.1. Under Settings → Tracking
        3.1.2. Decide on UTM parameters for EACH traffic source
        3.1.3. The link generated is now the link to use in your Ads/Email
    3.2. Method #2: Via UTM Explorer
        3.2.1. Below where the link would go: click Build URL Parameter

3.2.1.1. Campaign source: {{placement}}
3.2.1.2. Medium: cpc
3.2.1.3. Name: {{campaign.name}}
3.2.1.4. Content: {{ad.name}}
3.2.1.5. Create custom parameter
3.2.1.5.1. utm_term: {{adset.name}}
3.2.2. Because it's dynamic we can copy that query and use it for all FB ads instead of building it each time
3.2.3. Time to add the info to Funnelytics
3.2.3.1. Adjust the date range to cover the data
3.2.3.2. Click on the page in Funnelytics and go to Previous Steps tab
3.2.3.3. Click UTM Explorer Tab
3.2.3.4. Filter results as desired
3.2.3.5. Click Map button to add that source to the canvas
3.2.3.6. Rename traffic source if desired
3.3. Method #3: Setting up Organic sources
3.3.1. Click on the page in Funnelytics and go to Previous Steps tab
3.3.2. Click Organic Traffic Sources
3.3.3. Click Map button to add that source to the canvas
3.4. Method #4: Tracking Google Paid Ads
3.4.1. Simple way:
3.4.1.1. Add traffic icon
3.4.1.2. Setup "contains" custom key "gclid" under Settings→ tracking
3.4.1.3. Leave value field blank
3.5. NOTE: for split testing
3.5.1. Duplicate page and either link traffic sources to both OR duplicate traffic sources as well for clearer view
3.5.2. UTM parameters MUST persist. UNFORTUNATELY DOES NOT work on clickfunnels
3.6. NOTE: for combining sources
3.6.1. Emails might have different content parameter but otherwise be the same so input a single traffic source with that parameter blank to see all traffic there no matter how many emails

4. Set up Action tracking

4.1. Scroll Action … add steps when relevant
4.2. Exit Intent Action … add steps when relevant
4.3. May need to delay action scripts if they try to load before the Base script loads … add steps when relevant
4.3.1. https://codepen.io/Stockotaco/pen/LaxOBV

```
<script type="text/javascript">
(function() {
var i2=0, w=5 *10, cb=function(){
```

```
// your script below here

// your script above here
},i=setInterval(function() {
if (typeof window.funnelytics === 'undefined') return;
++i2 > w && clearInterval(i);
i2 > w && cb && (cb(), cb=null)
}, 100)
window.onbeforeunload = function() {cb && (cb(), cb=null)}
})();
</script>
```

4.4. Purchase Actions … add steps when relevant

5. Set up Goals

5.1. Lead goals
   5.1.1. Click on sales page → goals
   5.1.2. Name it “Lead”
   5.1.3. Value = n/a
   5.1.4. Type “Lead”
   5.1.5. Select source → click on opt-in page element
5.2. Sales goals
   5.2.1. Click on sales page → goals
   5.2.2. Name it “Main Product” or relevant name
   5.2.3. Value = it’s price
   5.2.4. Type “Sale”
   5.2.5. Select source → click on opt-in page element
   5.2.6.

Troubleshooting tracking script implementations

- Verify that the script is installed just one time.
- Verify that the script is installed near the bottom of the <body> in the document.
- Verify that the right project’s script is installed on the page.
    - Each project has its own script. It’s easy to install the script from another project on the page.

Troubleshooting Page Statistics

- Verify that the URL in the page settings does not redirect.

- The script has to actually load\ on the URL that is in the page settings.
- Verify that parameters are being used appropriately.
  - Parameters are used to filter the steps on that URL.
- Filters are used appropriately.
  - Check that the filters applied are the filters that are all intended.

Actions

- Event name and properties must match exactly (case sensitive).

Traffic Icons

- UTMs in your links and in traffic icons need to match exactly (case sensitive).

Cross-Domain Tracking

- Verify that the desired domain is inserted into the cross-domain whitelist.
- Verify that the browser doesn’t go between secure (https) and non-secure (http) pages.
- Verify that the redirect is not javascript based.