

A practical guide for marketing teams

After the DM.

Design the conversation.

Connect the handoff.

Measure the customer action.



The DM Campaign Field Guide

Blueprints, worksheets and launch checks
for a connected ManyChat system.

[Start here](#)

Leave with a build plan.

Use this guide for one real campaign. Bring the offer, the person responsible for marketing, and whoever owns your CRM or checkout.

DESIGN		CONNECT		VERIFY	
Write the campaign brief	04	Map the fields and source	07	Run the launch checks	12
Choose the customer route	05	Define confirmed outcomes	09	Read the campaign report	13
Draft the conversation	06	Plan for failed handoffs	11	Complete the build brief	15

Is this the right problem to solve?

If this is true	Start here
You have demand, but people get the same link regardless of need.	Design a question that changes the next step.
Leads reach your team without campaign context.	Map the handoff and source fields.
You can count DM clicks, but not confirmed bookings or orders.	Define the outcome and its receiving system.
Your offer or traffic source is still untested.	Validate those before paying for a complex integration.

Your output

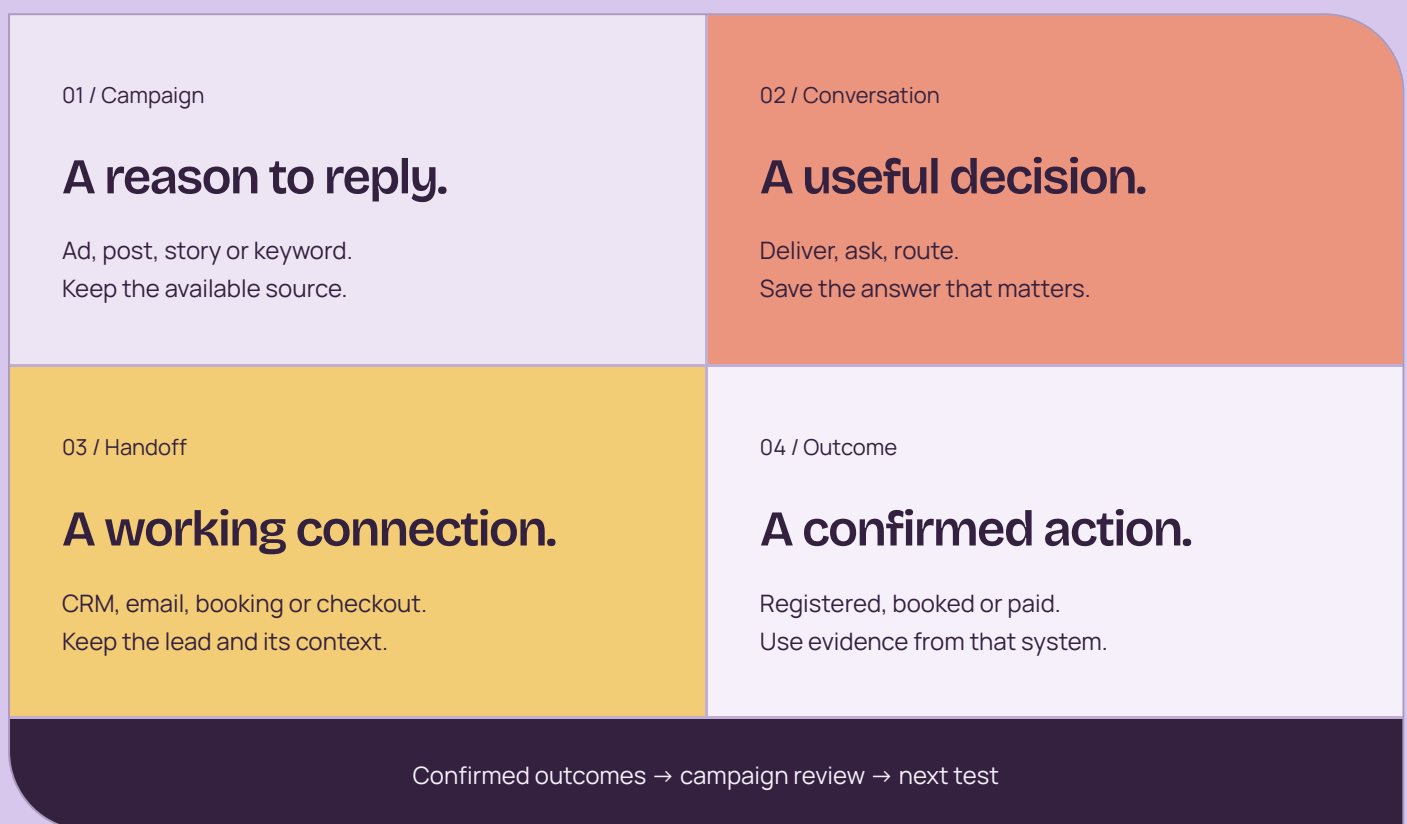
A campaign brief, a routing plan, a field and event map, and a tested launch checklist. The blank templates in the companion pack can go straight into your project.

This is a planning and implementation guide, not an importable ManyChat template. The examples are fictional. Platform features and permissions need checking in the account you will use.

The system

One journey. Two things to preserve.

The customer should get a useful next step. Your business should keep enough context to understand what happened.



For the customer

Give them what the campaign promised. Keep questions short. Make it easy to reach a person or leave the flow.

For the team

Know which route they took, where their record lives, what was confirmed, and what still cannot be matched.

A link is sometimes enough

A short resource-delivery flow can be the right design. Add branching and integrations only when they change a customer decision or make a business outcome measurable.

Operator evidence: ManyChat describes Agency U combining paid and organic triggers with CRM synchronization and appointments. We borrow the architecture, not its reported revenue or an implied guarantee. [Read the vendor case study ↗](#)

Worksheet / campaign

Start with the decision.

Write the campaign before you draw the flow. A different creative is not automatically a different customer journey.

The offer

What are we selling, at what price, and to whom?

The promise in the ad or content

What will the person expect when they reply?

The entry point

Which post, ad, story or keyword starts this journey?

The useful question

Which answer would change the resource, offer or handoff?

The customer action

What exactly should they do next, and which tool confirms it?

The campaign decision

What will we stop, change or invest in once results arrive?

Example brief

A consulting firm promotes a launch checklist. The flow delivers it, asks whether the visitor wants advice or implementation, routes ready buyers to a call, and keeps the campaign source in the CRM. The booking tool confirms the appointment. Sales records the eventual outcome.

Choose one primary outcome. "Engagement" is too broad to define a successful build.

Blueprints

Match the flow to the buying decision.

These are starting architectures. Adapt the questions, tools and timing to the offer; do not add every branch to every funnel.

A / Book a qualified call

Interest → fit → appointment

Deliver the promised resource. Ask the need and timing. Offer a booking link when the answers meet your written fit criteria; route other people to useful information or a person.

Save Need, timing, source, CRM ID, booking ID.

Confirm Booking in the calendar; attendance and sale separately.

B / Help someone buy

Question → relevant product → checkout

Ask what they need help choosing. Answer from approved product information. Send the relevant product or checkout link. Route exceptions and uncertain answers to your team.

Save Product interest, source, contact ID where available.

Confirm Paid order, currency, amount and later refunds.

C / Register and follow through

Interest → registration → participation

Give the date and topic. Route unavailable people to the next suitable option. Create the registration in the actual platform and use its approved reminder channels.

Save Event/cohort, source, registrant ID, follow-up permission.

Confirm Registration first; attendance and purchase later.

Do not use the same “conversion” for all three

A booking, a registration and a paid order are different events. Keep their names and denominators separate.

Conversation / worked example

Make each message earn its place.

A fictional comment-to-DM journey for a launch consulting firm. The resource is delivered before asking sales questions.

Trigger	Person comments PLAN on the launch checklist post.
Opening DM	“Want the launch checklist? Tap below and I’ll send it.” Send the checklist
Delivery	“Here it is. It covers the offer, launch sequence and follow-up.” Open checklist ↗
Routing	“Are you looking for ideas or help setting this up?” Ideas for now Help with setup
If setup	“When are you planning to launch?” This month Later Not sure
Next step	Offer a call or a useful preparation resource based on your fit rule. Ask for email only when needed and explain its use. Provide a human option.

The first tap matters

For Instagram comment triggers, sending the opening private reply does not by itself open the messaging window. A regular button, quick reply or reply can open it; an “Open website” button does not count as that opt-in. [Trigger documentation](#) ↗

Keep automated follow-up inside the permitted messaging window. Do not build a multi-day Instagram sales sequence on delays alone. Check current account/channel rules before launch. [Messaging windows](#) ↗

Data / field map

Keep context. Give every field an owner.

This is a proposed schema, not a list of native ManyChat fields. Confirm the actual field names and available identifiers in each integration.

Field	Example	Owner / purpose
campaign_key / creative_key	launch_q4 / video_b	Marketing: stable labels, not changing display names.
entry_point / flow_version	ig_comment_plan / v03	Automation: trigger and approved flow version.
first_dm_source / latest_dm_source	launch_q4 / launch_q4	CRM: preserve first source; update latest separately.
need / timing	implementation / this_month	Conversation: structured answers used for routing.
manychat_contact_ref / crm_contact_id	opaque refs, not public URLs	Integration: supported internal identity mapping.
booking_id / order_id	From the destination	Calendar/commerce: stable confirmed outcome ID.
outcome_at / status / value	UTC time / paid / amount + currency	Outcome system: authoritative status and money.
permission / match_status	purpose + timestamp / matched	CRM/backend: permission record and join quality.

Keep history intact.

A second campaign should not silently overwrite the original source. Store separate touches if your reporting needs them.

Handle missing data.

Use “unknown” with a reason. A guessed campaign or a fuzzy identity match should not become a confirmed attribution.

A person is not a UTM

UTMs describe a campaign. A supported contact reference and a legitimate destination join connect records. Store personal contact data in the operational system; do not put it in public tracking links.

ManyChat provides custom user fields; availability and destination mappings still need testing. [Custom fields documentation](#) ↗

Source / links

Track the route without changing its story.

Create one naming sheet for the campaign. Decide what “source” means before links and reports multiply.

Illustrative destination URL

```
https://example.com/launch?  
utm_source=instagram&utm_medium=paid_social  
&utm_campaign=launch_q4&utm_content=video_b
```

Parameter	Use in this example
utm_source	Origin platform: instagram.
utm_medium	Acquisition channel: paid_social. Organic entries use your agreed organic convention.
utm_campaign	Stable campaign label: launch_q4.
utm_content	Creative variant: video_b. Keep flow version separately.

- 1 Separate acquisition from delivery.** Instagram may be the acquisition source while ManyChat is the delivery tool. Do not relabel every route “ManyChat” if that hides the campaign distinction you need.
- 2 Test every redirect.** Check the final landing page, the form, checkout and booking confirmation. A parameter visible on the first page can still disappear later.
- 3 Keep the CRM source separately.** A tagged website visit does not guarantee the booking or order contains that campaign. Confirm the destination can receive and return a reference.

Cross-domain is conditional

GA4 cross-domain measurement can connect supported domains using the same web stream. An external booking or checkout tool may not let you install the required tags or retain parameters. Review the integration instead of assuming it works.

Use consistent, case-sensitive UTM values. [Google campaign URL guidance](#) [↗] [Cross-domain setup and testing](#) [↗]

Measurement / event contract

A click is an intention. A booking is an outcome.

Write the trigger, authority and duplicate rule for every stage. Event names below are internal examples, not automatic GA4 or Meta mappings.

Internal event	When it is true	Proof / duplicate rule
dm_engaged	A qualifying interaction is recorded.	ManyChat interaction; separate total runs from unique contacts.
lead_upserted	The CRM has accepted the lead record.	Returned CRM ID; upsert, do not recreate on every reply.
destination_arrived	A permitted website visit is observed.	Site measurement; not assumed from a DM click.
booking_confirmed	The calendar confirms an appointment.	Booking ID; store reschedule/cancel changes separately.
registration_confirmed	The event platform accepts registration.	Registrant + event ID; do not count repeat retries.
purchase_paid	The commercial system confirms payment.	Order/transaction ID; amount and currency required.
refund_recorded	The commercial system records a refund.	Refund ID and original order ID; reconcile net value.

For each integration, write this contract.

Event	Source system
Unique outcome ID	Update / reversal rule

Do not count the thank-you page twice

Reloads and integration retries can repeat events. Use a stable outcome ID and a deduplication rule. Platform-specific event mappings and browser/server deduplication must be designed for the receiving tool.

Choose one authoritative revenue basis: paid sales, cash collected or net sales. Do not mix pipeline value with paid orders.

Attribution / reality check

Three views. Not one perfect number.

Use the reports for different decisions. A source connection tells you what was observed; it does not prove what caused an additional sale.

Website view

Which campaign sent this visit?

Use GA4 campaign and session reporting. Tags, consent, redirects and session boundaries affect what is observable.

Customer record

What happened to this lead?

Use the CRM and outcome system. Define the join, eligible touch, reporting window and treatment of cancellations.

Ad platform

What does the platform credit?

Use platform reports under their attribution settings. Do not add those conversions to CRM sales as if they are extra customers.

A usable rule for your internal report

For a first implementation, agree on one rule your data can support. Example: connect a confirmed booking to the most recent recorded DM campaign within 30 days. Keep the earlier touches; label this a last-DM-touch report, not universal attribution.

Thirty days is an illustrative business choice, not a ManyChat setting or industry standard. A longer sales cycle may need another rule.

Report the gaps with the results

Show unmatched outcomes, missing source fields, unsupported destinations and the date range. Cross-device journeys may remain unmatched. More scripts do not recreate data you never collected.

ManyChat Analytics is currently an Instagram-only, paid-plan beta with gradual access. ManyChat Pixel can supplement website tracking on paid plans, but its contact token and session behavior need testing. Neither replaces an agreed revenue ledger. [Analytics ↗](#) [Pixel ↗](#)

Operations

Design the failure path before it fails.

“Request sent” is not the same as “lead received.” A useful automation includes a way to recover when a tool is unavailable.

Failure	Customer experience	Team response
CRM request times out	Keep the requested resource available. Do not claim their lead was saved.	Queue a retry; alert an owner; verify receipt before marking complete.
Request retries	No duplicate booking or repeated sales messages.	Use supported upserts and stable event IDs; cap retries.
Email is invalid	Ask for a correction once; allow a human route.	Keep status incomplete; do not invent or silently repair an address.
Person asks an unexpected question	Offer a person instead of looping through the same buttons.	Save the context, assign an owner and pause conflicting automation.
Booking tool is unavailable	Explain that booking is temporarily unavailable.	Provide a safe fallback; monitor restoration and missed requests.
Outcome has no source join	Service the customer normally.	Record unmatched with a reason; fix the join, do not guess credit.
Messaging window has closed	Do not promise an automated DM reminder.	Use a permitted, consented channel or wait for a new eligible interaction.

Integration review

Check native connectors first. If they cannot carry the required fields or outcomes, review an integration platform or a supported API connection. ManyChat External Request supports HTTPS calls on certain paid plans; the destination API and permissions still determine feasibility. [External Request documentation ↗](#)

Failure owner _____ Alert destination _____

Never place API secrets in customer-facing HTML or tracking links. Retry queues and identity joins need an appropriate backend or integration service.

Launch / acceptance tests

Test the actual journey. Keep the evidence.

Use agreed synthetic records in a test environment where available. Verify the receiving system as well as the sending one.

Test	What must pass
Correct entry point	The intended trigger runs and the available source is captured.
Opening interaction	The first eligible interaction advances the flow; unopened DMs do not skip ahead.
Each routing branch	Every answer reaches its intended next step; "not sure" has a useful route.
Contact capture	Invalid details are handled; saved fields match what was entered.
CRM handoff	The receiving record exists with the correct context and supported identifier.
Return visitor	An existing contact updates correctly without destroying prior source history.
Destination / redirects	The landing and booking/checkout route retains required parameters or reference.
Confirmed action	A test booking, registration or order appears once in the authoritative system.
Outcome return	The result joins back to the intended lead and source, or is explicitly unmatched.
Retry / duplicate	A repeated event does not create a second outcome or repeated customer message.
Cancel / refund	The status and reporting update under the agreed rule.
Human takeover / timeout	Assignment, automation pause and messaging-window behavior work as intended.

Release only when the agreed critical checks pass.

For each test, record: expected result / observed result / evidence / owner / pass or fail. A screenshot of a successful outbound call is not proof that reporting received the outcome.

Companion file: **launch-checklist.csv**. Add account-specific tests and block launch on unresolved critical failures.

Reporting / worked example

The cheaper lead isn't always the better lead.

Fictional data for two paid creatives in one booking campaign. Same reporting period, USD, same definitions; this is not a benchmark or client result.

Campaign cohort	Creative A	Creative B
Spend	\$1,200	\$1,200
Unique engaged DM contacts	240	160
Qualified contacts	48	64
Confirmed bookings	24	32
Customers confirmed in CRM	6	8
Paid revenue attributed by our rule	\$6,000	\$8,000
Cost / qualified contact	\$25.00	\$18.75
Cost / confirmed customer	\$200	\$150
Attributed paid revenue / spend	5.0×	6.7×

Read it correctly

**A attracts more conversations.
B produces more useful outcomes.**

Cost per engaged contact is \$5 for A and \$7.50 for B. A wins on that metric. B has lower cost per confirmed customer.

Use clear denominators.

A qualification rate: $48 \div 240 = 20\%$. B: $64 \div 160 = 40\%$. Use unique engaged contacts.

Keep the missing outcomes.

If 16 customers were confirmed overall and only 14 were matched to these DM sources, match coverage is $14 \div 16 = 87.5\%$. Keep the other two unmatched.

What this does not prove

This example does not prove causal lift or a lasting winner. Revenue/spend is not profit. Include margin, software and fulfillment costs.

Companion file: **report-example.csv**. The internal example uses last recorded DM touch within 30 days of engagement; preserve unmatched records separately.

Improve / one decision at a time

Find the break. Then change the right thing.

Diagnose the stage before rewriting the whole conversation. Record the version and change one meaningful variable at a time.

What you observe	What to check first	A focused test
Opening DMs sent; few eligible taps	Does the first message match the content promise?	Clarify the promised resource and the tap label.
Many replies; few relevant leads	Is the ad attracting the right need? Is the fit rule sensible?	Test a clearer creative or one useful routing question.
Qualified leads; few destination arrivals	Is the next step relevant? Does the link work on phone?	Simplify the handoff message or repair the link.
Arrivals; few bookings or paid orders	Is the destination usable? Does its offer match the DM?	Fix the destination before adding more DM reminders.
Outcomes exist; reporting is missing them	Are IDs, source and status actually received?	Repair the integration; do not call it a conversion problem.
Bookings; few customers	Attendance, sales fit and sales process.	Review qualification and sales follow-through together.

AI can help classify.

Free-text needs, intent categories and team summaries can be useful. Test against representative messages and record uncertain cases.

AI should not invent.

Keep prices, eligibility and commitments in approved rules. Give uncertain or sensitive conversations a human route. Start with buttons when they solve the decision.

Write the learning down

Hypothesis → change → campaign and flow version → eligible cohort → outcome → next decision. Allow for sales lag. Small samples are a reason to keep learning, not a reason to claim a winner.

Worksheet / build brief

Your campaign. Ready to scope.

Complete this sheet with your team. It is useful whether you build internally, hire ChatFunnels or work with another specialist.

Offer + traffic

What is selling, and which campaign starts the conversation?

Systems + owners

ManyChat account, CRM/email, website, calendar/checkout; who owns each?

Integration gaps

Which connections, permissions or identity joins still need review?

Conversation + fit rule

What do we deliver, ask and route? When does a human take over?

Source + confirmed outcome

Which fields can we preserve? Which system proves the result?

Acceptance + decision

Critical launch tests; reporting rule; what will the results help us change?

☐ Messages approved

☐ Outcome defined

☐ Owners named

☐ Launch tests agreed

You have a useful brief when...

A builder can explain the happy path, failure path, required data and evidence of success without guessing.
Any unsupported connection is identified before it becomes a promise.

Keep building

Use the plan. Check the connections.

A reliable funnel is a conversation, a handoff and a measurement plan that work together.

Want help with the build?

Bring the brief. We'll review the setup.

ChatFunnels designs and implements ManyChat funnels, supported lead handoffs and agreed outcome tracking in your existing tools.

[Discuss your DM funnel ↗](#)

Bring your completed brief or ask a question: towersjavin@gmail.com.

Sources & reading

1. [ManyChat: Instagram Post and Reel Comments trigger ↗](#)
Opening private reply, eligible interaction and website-button distinction.
2. [ManyChat: Understanding messaging windows ↗](#)
Automated messaging eligibility and channel-specific timing.
3. [ManyChat: Custom User Fields and Bot Fields ↗](#)
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6. [ManyChat: Analytics ↗](#)
Instagram-only paid-plan beta and available reporting.
7. [Google Analytics: Campaign URL builders ↗](#)
UTM parameters and naming consistency.
8. [Google Analytics: Cross-domain measurement ↗](#)
Shared stream, linker and redirect verification.
9. [ManyChat: Austin Schneider / Agency U ↗](#)
Vendor-reported example of a connected DM/CRM architecture.

Sources checked 10 October 2026. The blueprints, worksheets, naming conventions and worked data are original ChatFunnels planning recommendations, not vendor defaults. Feature access and policies can change. This guide is independent of ManyChat; no affiliation or guaranteed performance is implied.