

# Facebook Conversion API (CAPI) Setup Guide

*The Simplified Step-by-Step Process*

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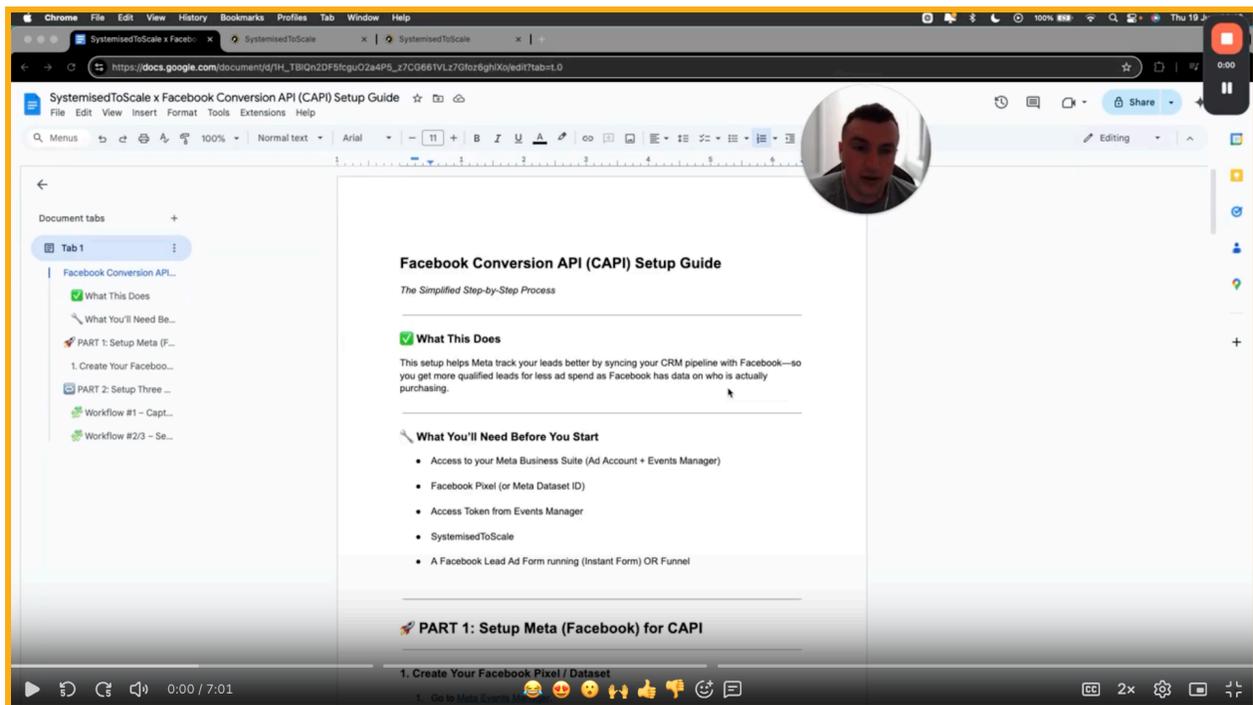
## ✔ What This Does

This setup helps Meta track your leads better by syncing your CRM pipeline with Facebook—so you get more qualified leads for less ad spend as Facebook has data on who is actually purchasing.

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↓ Please Watch This Video ↓

*If the video below doesn't load please [click here](#)*



The image shows a Google Docs document titled "SystemisedToScale x Facebook Conversion API (CAPI) Setup Guide" with a video player overlay. The document content includes:

- Facebook Conversion API (CAPI) Setup Guide**  
*The Simplified Step-by-Step Process*
- ✔ What This Does**  
This setup helps Meta track your leads better by syncing your CRM pipeline with Facebook—so you get more qualified leads for less ad spend as Facebook has data on who is actually purchasing.
- What You'll Need Before You Start**
  - Access to your Meta Business Suite (Ad Account + Events Manager)
  - Facebook Pixel (or Meta Dataset ID)
  - Access Token from Events Manager
  - SystemisedToScale
  - A Facebook Lead Ad Form running (Instant Form) OR Funnel
- PART 1: Setup Meta (Facebook) for CAPI**  
**1. Create Your Facebook Pixel / Dataset**

The video player overlay at the bottom shows a play button, a progress bar at 0:00 / 7:01, and various control icons. A circular video feed of a man's face is visible in the top right corner of the document window.

## What You'll Need Before You Start

- Access to your Meta Business Suite (Ad Account + Events Manager)
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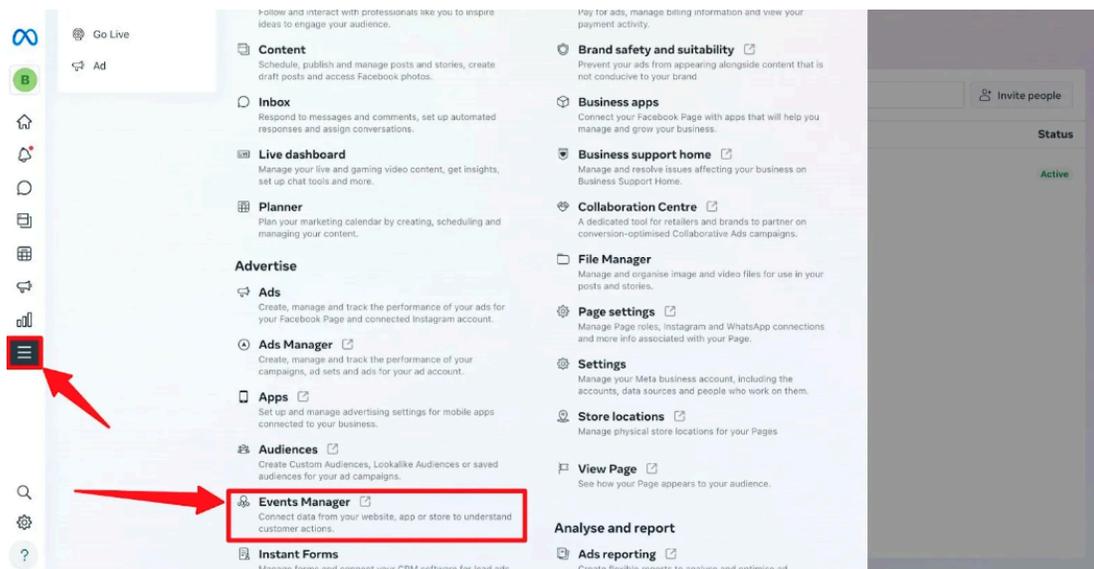
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## PART 1: Setup Meta (Facebook) for CAPI

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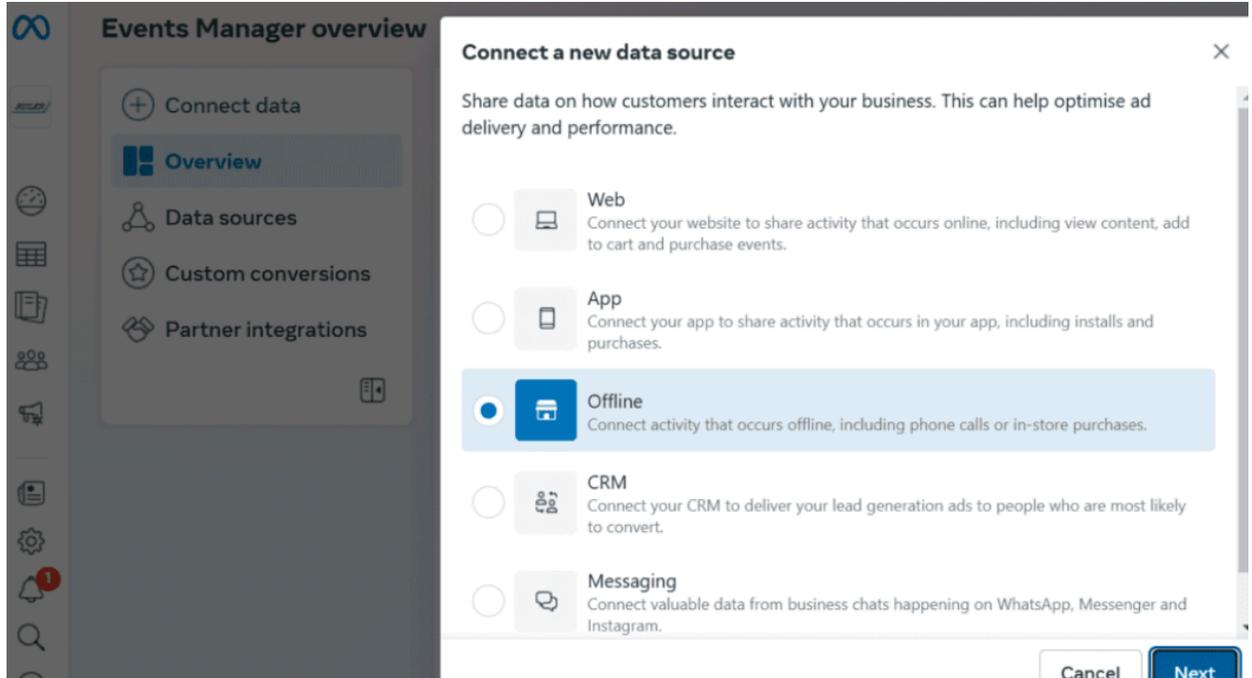
### 1. Create Your Facebook Pixel / Dataset

1. Go to [Meta Events Manager](#).
2. Click **Connect Data Sources** → Select **CRM** → Click **Connect**.
3. Name your Dataset → “SystemisedToScale”.
4. Select the appropriate **Ad Account** and **Facebook Page**.



Meta Business settings interface. The left sidebar contains a list of settings categories: Instagram accounts, WhatsApp accounts, Data sources, Brand safety and suitability, Registrations, Integrations, Billing and payments, Security Centre, Requests, Notifications, Business info, and Setup Guide. The main content area is titled "All tools" and "Meta Business Suite". It features a "Shortcuts" section with icons for Business settings, Events Manager, Ads Manager, Audiences, Business Support, and Ads reporting. Below this is a "Manage business" section with links to Apps, Billing & payments, Brand safety and suitability, Business settings (highlighted), Business Support Home, Collaboration Centre, Events Manager (highlighted), and Media Library.

Meta Events Manager interface. The left sidebar shows navigation options: Overview, Data sources (highlighted), Custom conversions, and Partner integrations. A red box highlights the "Connect data sources" button, with a red arrow pointing to it. The main content area is titled "Website data" and includes tabs for Overview, Diagnostics, History, and Settings. It displays a graph for "All activity" with the message "No activity was received in the selected time frame." Below the graph is an "Upload Events" button and a table with columns for Events, Connection method, and Total events. A right-hand panel shows "No recent activity" and "Event set ID" with a redacted ID.



5. Click **Next** until it's created.

6. Copy:

- **Pixel ID** (aka Dataset ID)
- **Access Token** (go to Settings → Generate Token)

📌 **Save these safely** – you'll need them in your workflows.

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## **PART 2: Setup Three Workflows in SystemisedToScale**

We'll need **3 workflows** inside your CRM:

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### **Workflow #1 – Capture Lead from Facebook Form or funnel**

This workflow sends lead info to Meta when someone fills out your Facebook ad form.

1. Go to **Automations** → **Workflows** → **Create New Workflow** (\*or find the workflow that is already in use for leads that submit forms / surveys)
  2. Click **+ Add Trigger** → Choose (\*depending on what you would like to trigger the automation):
    - Facebook Form Submitted
    - OR
    - Form
    - OR
    - Survey
  3. Optional: Filter by a specific form name.
  4. Click **+ Add Action** → Choose:
    - Facebook Conversion API
    - Paste your **Access Token** and **Pixel ID** (\*from step 1.6 above)
    - Choose Event Type: **Lead**  
(\*set your currency and then leave 'value' and 'test code' blank)
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## **Workflow #2/3 – Send Data When Pipeline Stage Changes**

This fires the CAPI event when your sales team moves the lead in your CRM.

1. Find your Consult Call Scheduled automation
2. Add Action:
  - Facebook Conversion API
  - Paste **Access Token + Pixel ID**
  - Choose Event Type: **Schedule**  
(\*set your currency and then leave 'value' and 'test code' blank)

3. Find your Onboarding 1 automation

4. Add Action:

- Facebook Conversion API
  - Paste **Access Token + Pixel ID**
  - Choose Event Type: **Purchase**  
(\*set your currency and then add the 'value' and leave 'test code' blank)
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