

# Automatically apply a note in a sequence

Last modified on: 07/09/2025 6:54 am MST

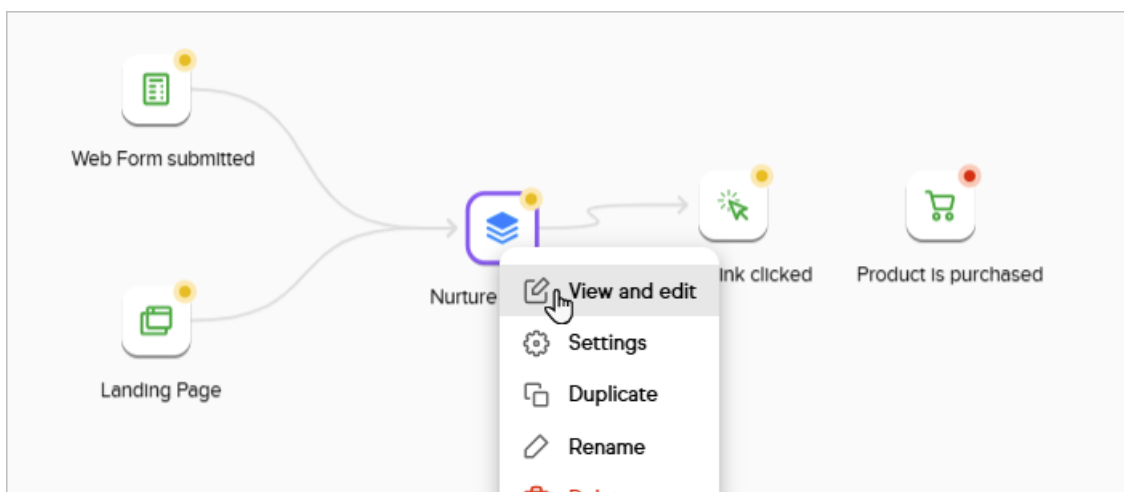
Tags: Keap-Pro Keap-Max

The note object adds a date stamped note with standardized comments to a contact history. They are often used to mark a relationship milestone.

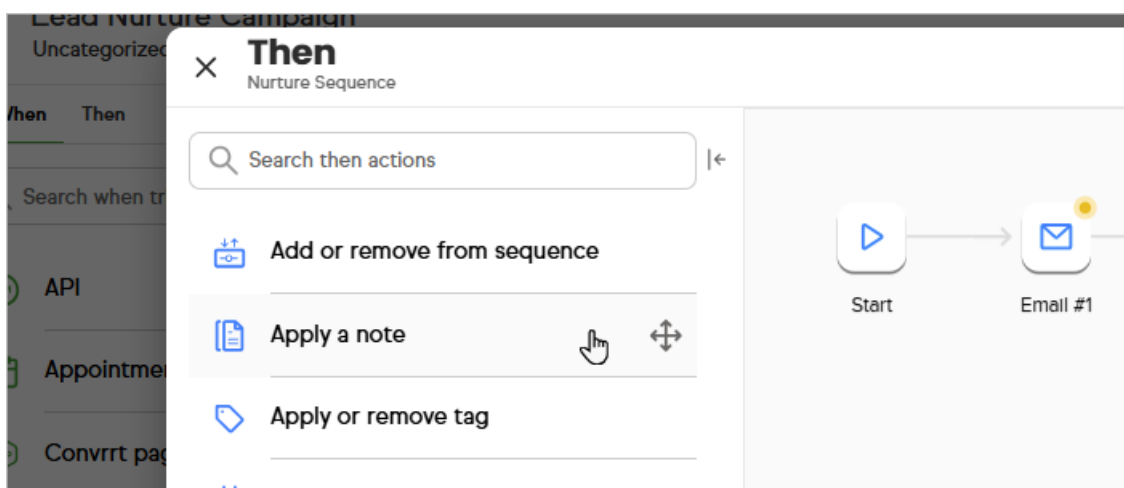


**Please note!** Each note object must be configured individually. They cannot be re-used in multiple sequences or at more than one point in the same sequence. Note objects are not archived. If you delete a note object from a sequence, it can only be restored if you restore a previous version of the entire automation.

1. Click on the sequence you wish to edit or double-click to open.



2. Add an **Apply a note** "then" onto the canvas.



3. Select an **Action Type** from the drop-down.

Merge Fields	<a href="#">Merge</a>
Action Type *	<div style="border: 1px solid #ccc; padding: 5px;"> <div style="background-color: #9900cc; color: white; padding: 2px;">✓ Please select one</div> <div style="padding: 2px;">Call</div> <div style="padding: 2px;">Email</div> <div style="padding: 2px;">Appointment</div> <div style="padding: 2px;">Fax</div> <div style="padding: 2px;">Letter</div> <div style="padding: 2px;">Other</div> </div>
Title *	
Description	
Notify	

4. Give your note a **"Title"**

Merge Fields	<a href="#">Merge</a>
Action Type *	Email <span style="float: right;">▼</span>
Title *	~Contact.FirstName~ purchase
Description	<div style="border: 1px solid #ccc; height: 30px;"></div>
Notify	Please select a User

5. Enter a **"Description"**. Drag the bottom right corner to give yourself more room.

- The description should be generic since this note is applied automatically to all of the contacts who reach this point in the sequence.

Merge Fields	<a href="#">Merge</a>
Action Type *	Email <span style="float: right;">▼</span>
Title *	~Contact.FirstName~ purchase
Description	Sent instructions to schedule Intake appointment
Notify	Please select a User

6. Select a user to attribute this note to. The user name will show up along with the note in the contact history.

Title *	~Contact.FirstName~ purchase
Description	Sent instructions to schedule Intake appointment
Notify	Olivia Keaperson X

7. Click **Save** and **Done** when you are finished

X Apply note Save

Summary

This apply note section adds a date stamped with standardized comments to a contact history. They are often used to mark a relationship milestone.

Test

{#}

Note action type\*

Fax