

# Automatically apply a note in a sequence

This article applies to:

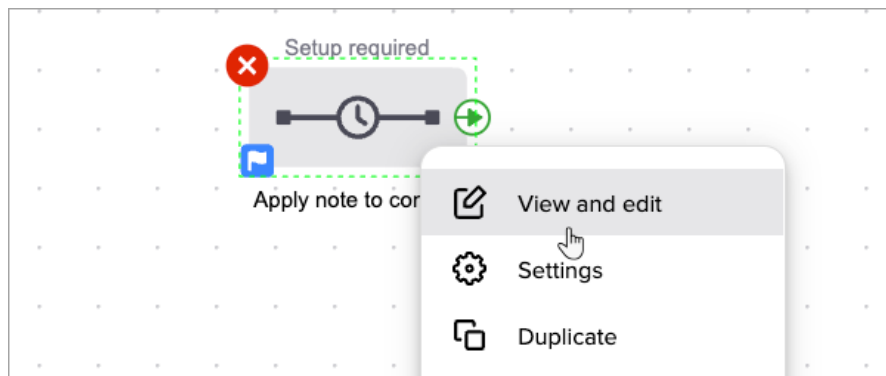
[Pro](#)

[Max](#)

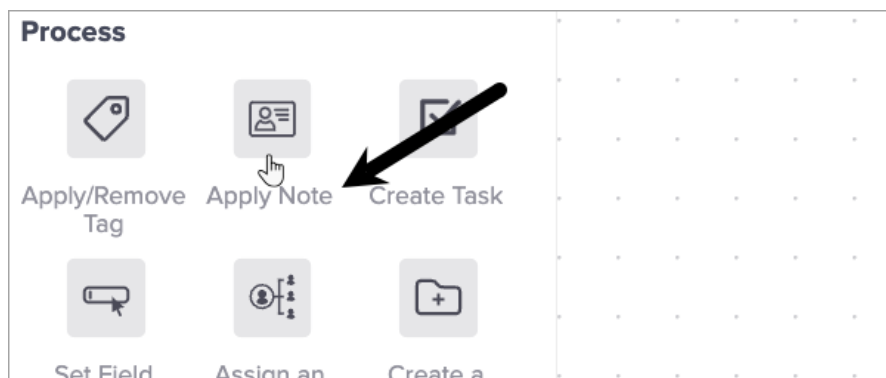
The note object adds a date stamped note with standardized comments to a contact history. They are often used to mark a relationship milestone.

**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.

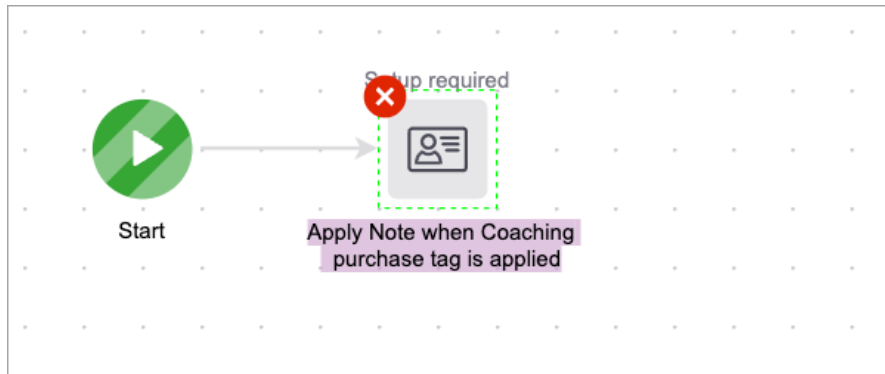
1. Click on the sequence you wish to edit or create a new sequence.



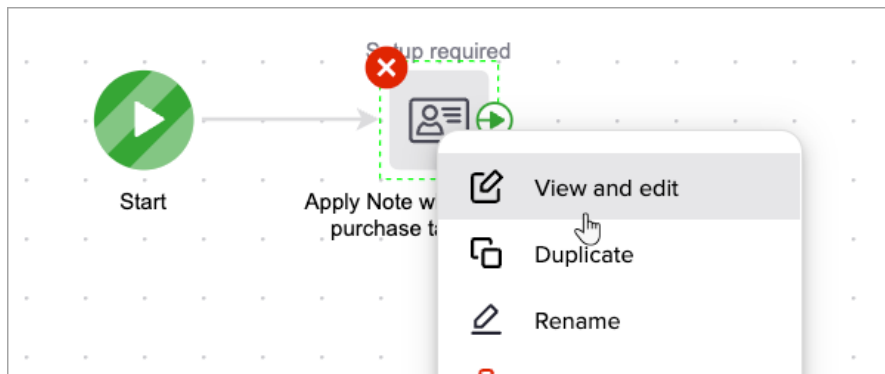
2. Drag and drop an **"Apply a Note"** process onto the canvas.



3. Name the **"Apply Note"** process for better reporting



4. Click the **"Apply Note"** process followed by **"View and Edit"** to configure it.



5. Select an **"Action Type"** from the drop-down.

Merge Fields	Merge
Action Type *	<ul style="list-style-type: none"> <li>✓ Please select one</li> <li>Call</li> <li>Email</li> <li>Appointment</li> <li>Fax</li> <li>Letter</li> <li>Other</li> </ul>
Title *	
Description	
Notify	

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

Merge Fields	Merge
Action Type *	Email
Title *	~Contact.FirstName~ purchase
Description	
Notify	Please select a User

7. 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
Title *	~Contact.FirstName~ purchase
Description	Sent instructions to schedule Intake appointment
Notify	Please select a User

8. 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 ✕

9. When ready slide the "Draft" to "Ready".

Draft	<input type="checkbox"/>
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Ready