

Goals - Task Completed[®]

This article applies to:

[Pro](#)

[Max](#)

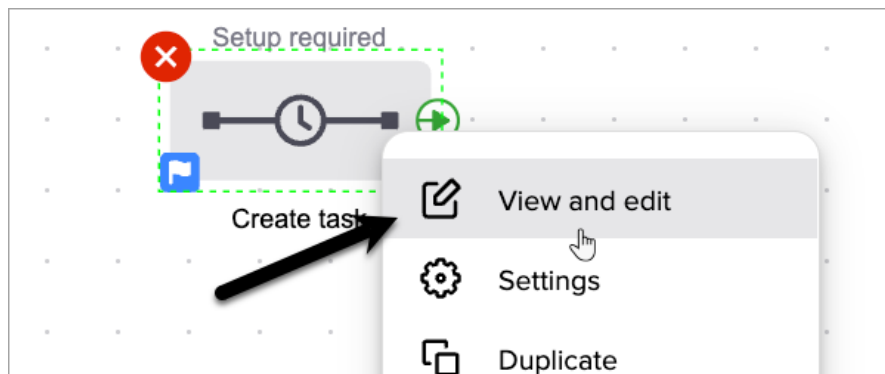
Tasks that you add to a sequence can be used to satisfy a task completion goal. Once all the required tasks are complete, the goal is satisfied and the automation will continue. The task completion goal must be preceded by at least one sequence containing tasks driving to the goal. There is no limit to the number of tasks in the sequence nor is there a limit to the number of sequences with tasks driving to the goal.

Important! Before you configure the task goal setting, you must add and customize the tasks in the sequence that are designed to achieve the goal.

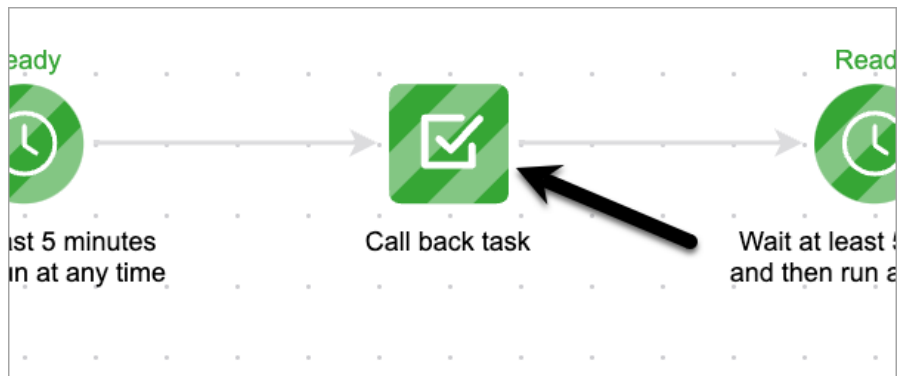
1. [Create automation based on task outcomes](#)
2. [Create multiple task outcome goals with both "And" and "Or" options](#)
3. [Create ongoing automation based on Task completion](#)

Create automation based on task outcomes

1. Click the sequence you wish to edit followed by **View and Edit**"



2. Add and configure at least one Create Task process to the sequence



Note: In the "Create Task process", ensure you set "Task outcome options" for the task

Task outcome options

Left voicemail ✕ Spoke with customer ✕

Appointment scheduled ✕ Closed ✕

i You can trigger automation based on a task outcome by using the "Task outcome" goal. [Learn More](#)

3. Exit the sequence and return to the campaign canvas

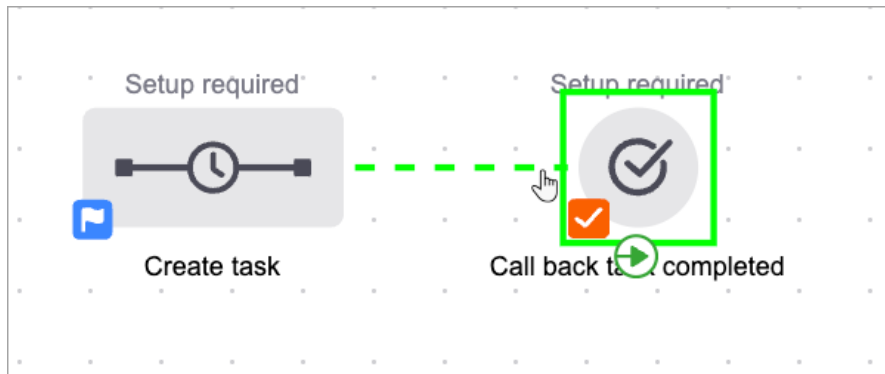
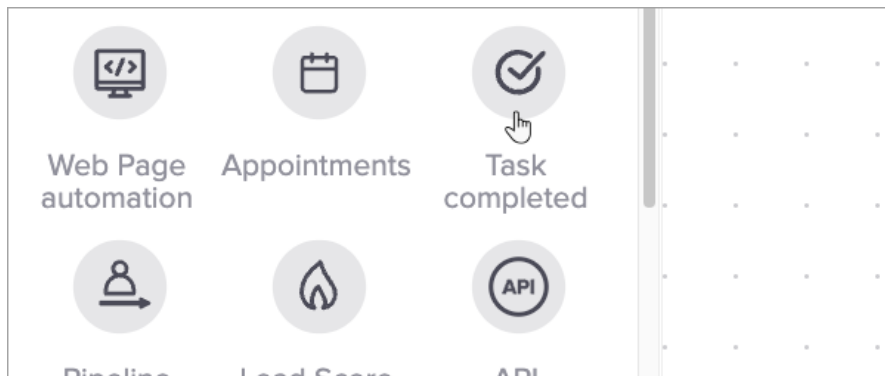
← Create task

Sequence Tools ✕

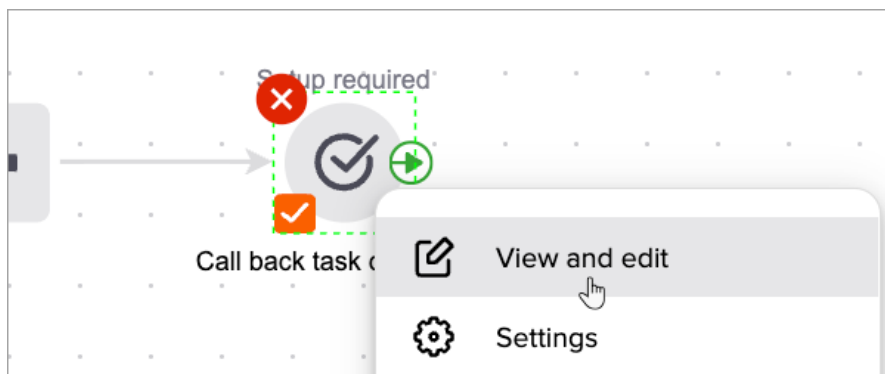
Timers

⌚ 📅 👤 ▶

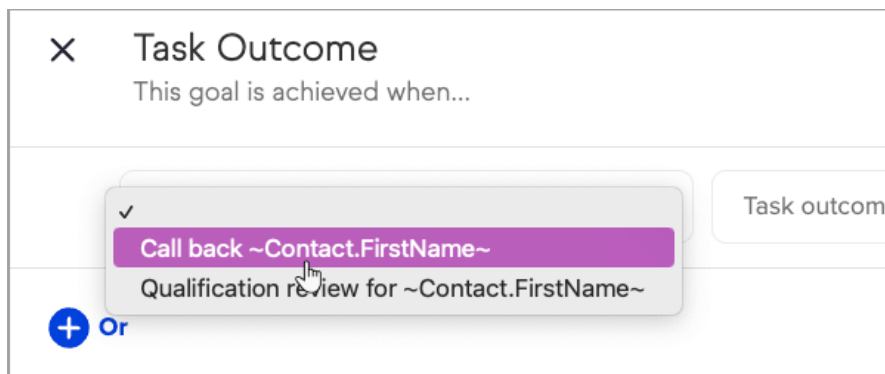
4. Drag a task completed goal onto the canvas and connect it to the sequence



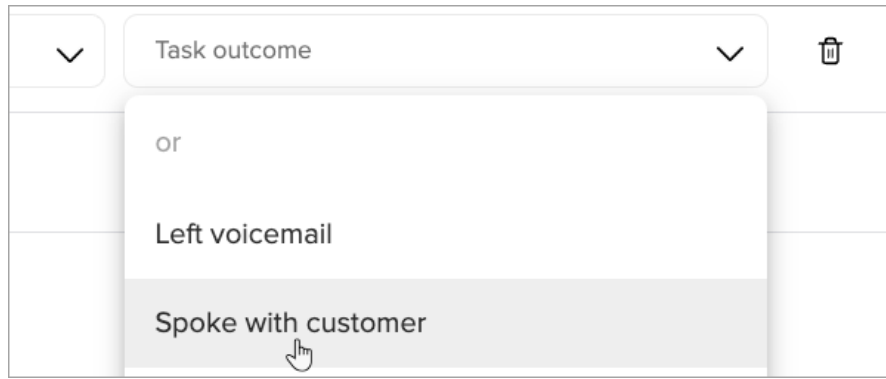
5. Click the "Task completed" goal followed by "View and Edit" to configure it



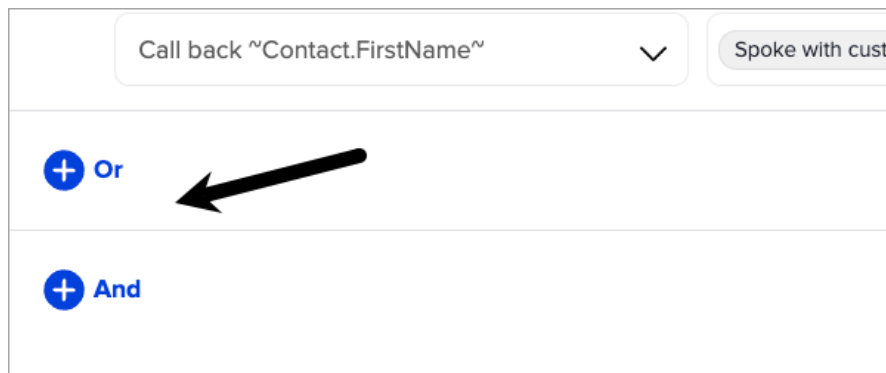
6. Select a task to satisfy the goal



7. Select task any outcome(s) to satisfy the goal

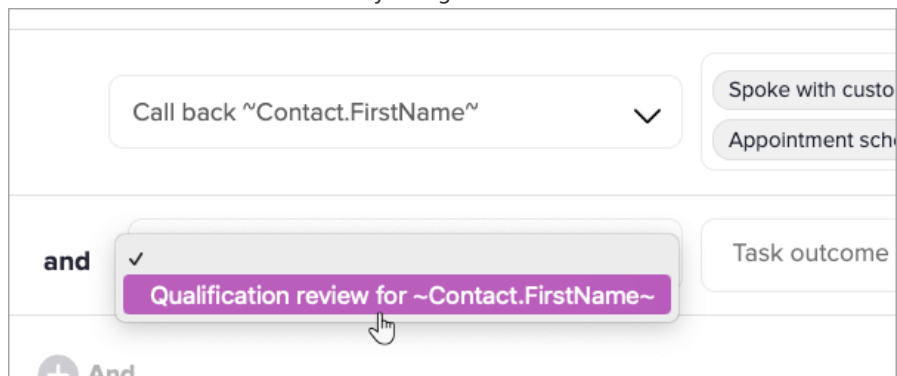


8. Add additional tasks to the goal by selecting **And** or **Or**

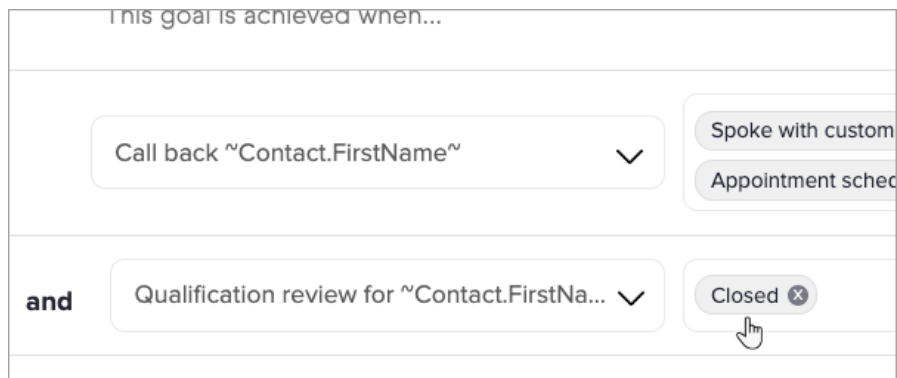


Note: You can't use both **"And"** and **"Or"** in the same task outcome goal. Instead you can create multiple Task outcome goals, one with **"Or"** options and one with **"And"** options.

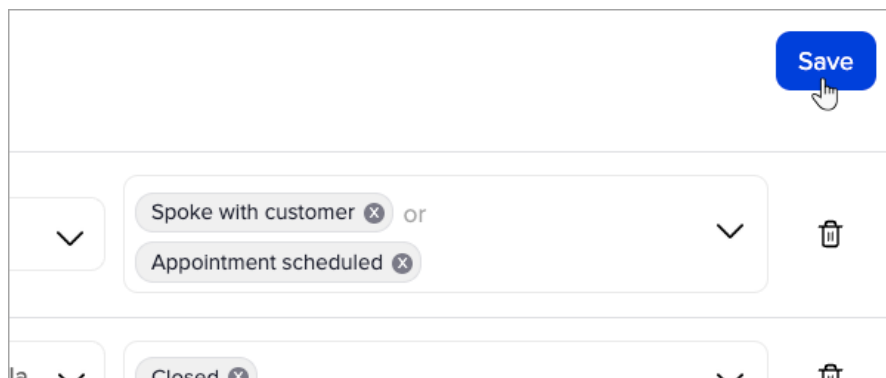
9. Select an additional task to satisfy the goal



10. Select additional outcomes to satisfy the goal

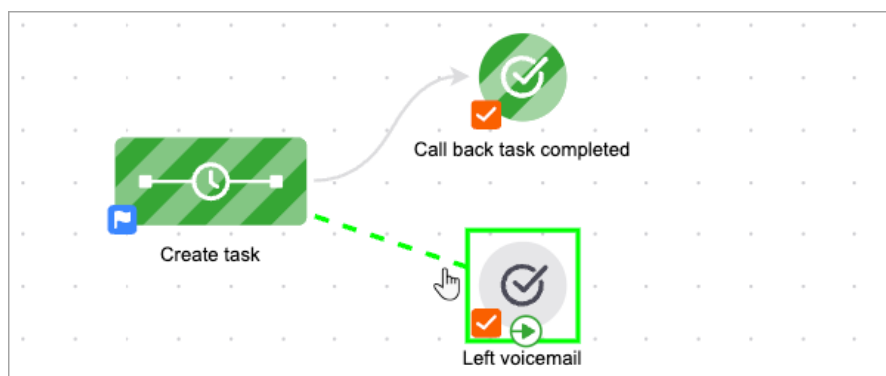


11. Click **"Save"**

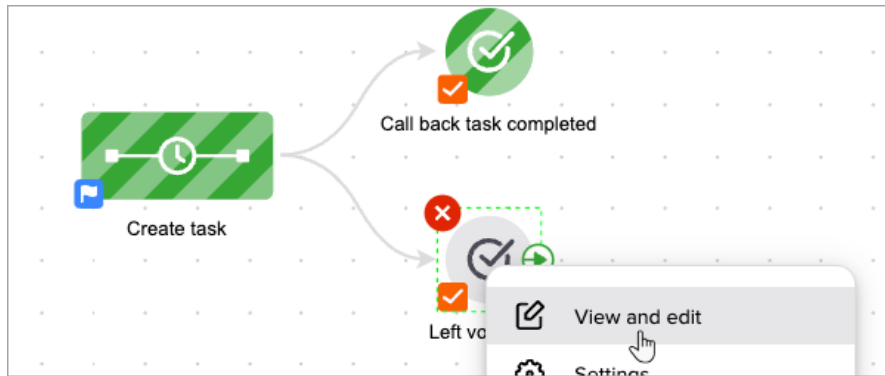


Create multiple task outcome goals with both "And" and "Or" options

1. Drag a second **"Task Completed"** goal onto the canvas and connect it to the same sequence as your first **"Task Completed"** goal



2. Click the **"Task Completed"** goal followed by **"View and Edit"** to configure it



3. Select a task and outcome(s) to satisfy the goal

✕ **Task Outcome**
This goal is achieved when...

Call back ~Contact.FirstName~

Left voicemail ✕

+ Or

4. Select "And" or "Or"

Call back ~Contact.FirstName~

Left voicemail ✕

+ Or

+ And

5. Select additional task(s) and outcome(s) to satisfy the goal

✕ Task Outcome
This goal is achieved when...

Call back ~Contact.FirstName~ ▾ Left voicemail ✕

or

Qualification review for ~Contact.FirstNa... ▾ Closed ✕

6. Click "Save"

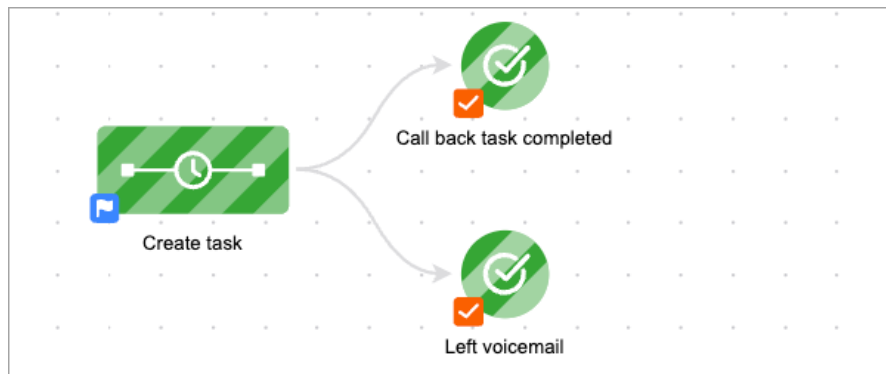
Save

Spoke with customer ✕ or

Appointment scheduled ✕

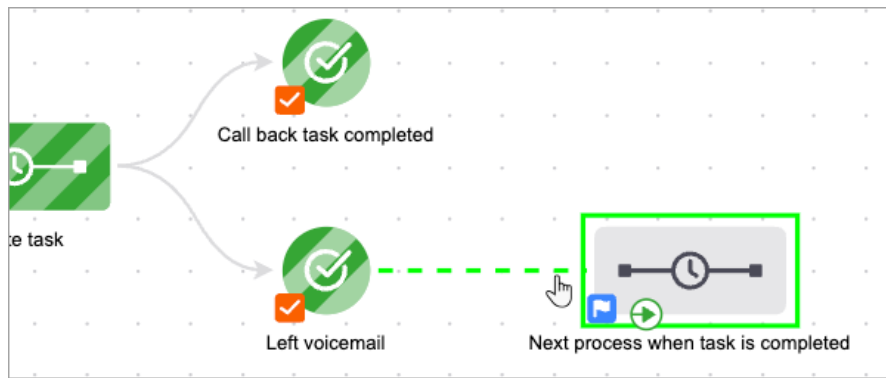
la ▾ Closed ✕

7. End results example



Create ongoing automation based on Task completion

1. Connect "Task Completed" goal to the next sequence that will start when the task is complete



2. You are now ready to publish your changes.

