

Goals - Note Applied

This article applies to:

A note template is used to record a personal interaction or event related to an individual contact record. Note templates save time by reducing or eliminating manual follow-up changes. Note templates can also be used to initiate automation with Note Template Goals.

Users can manually add notes to a contact history to document specific interactions such as a phone call, appointment, or meeting.

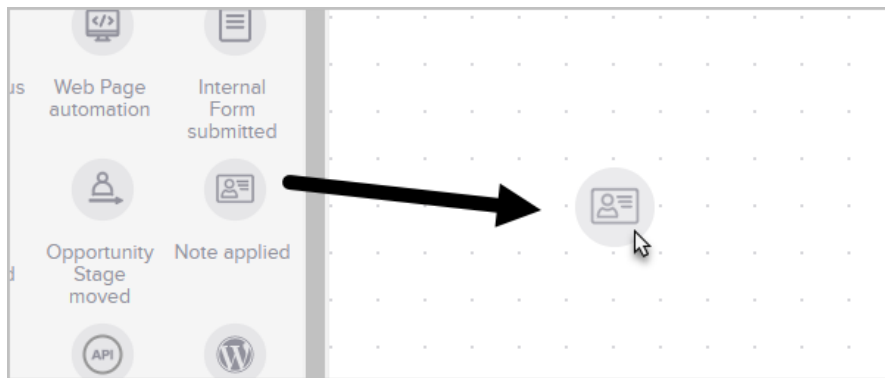
- Notes include a date stamp and a description of the interaction.
- Interactions can satisfy a goal in an automation.
- If a personal interaction has more than one possible outcome, then create multiple goals, each with a unique note assigned to it.
- Users can use a note to satisfy a purchase goal if they do not process purchases online.
- Notes that satisfy a goal are available to users after the goal is configured and the automation is published.
- A note can be assigned to only one goal. You cannot reuse automations.

Be Careful! Goals based on note updates are satisfied whenever a note is added to a contact history.

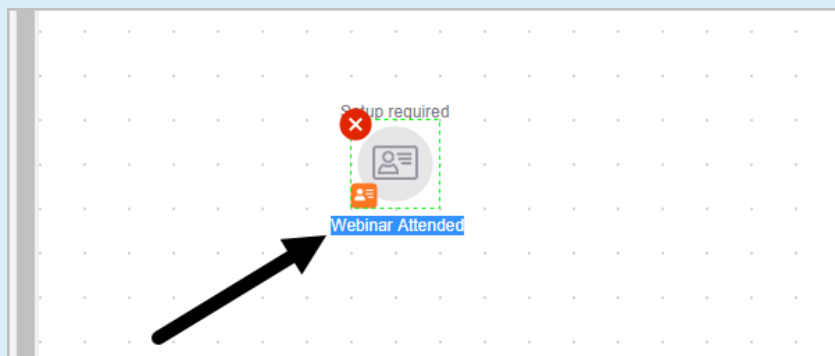
- The related sequence(s) begin even if the contact is not in the automation.
- Make sure your users can easily identify the notes used as goal methods and that they understand Note Template Goals.

Create a Note applied goal

1. Drag a Note applied goal onto the canvas.



- Optional: Double-click the name below to icon to choose a new name. Note that this is the name that will be presented when you apply it to a contact record.



- Double-click the goal and select an **Action Type** from the drop down menu.
- Enter a description

Merge Fields	Merge
Action Type *	Other
Title *	Webinar Attended
Description	Attended Maximize Your Profits Webinar
User	The logged-in User
Notify	Please select a User

- The description becomes a link in the contact history.
- Users click on the description link to view creation notes.
- Note that users can add custom comments before saving the note to the contact history.
- (Optional) Attribute this note to a user. The system default attributes the note to the logged in user who uses the note.
- (Optional) Set up email notifications. The user(s) you select will receive an email notification each time this note is used. Click on a user's name to select.

7. To apply a note template:

1. Open the contact record, scroll down to the Notes section, and select the note template from the drop-down.
2. Click **Add Note**.

