Create a Note Applied goal

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 in Campaign Builder with Note Template Goals.

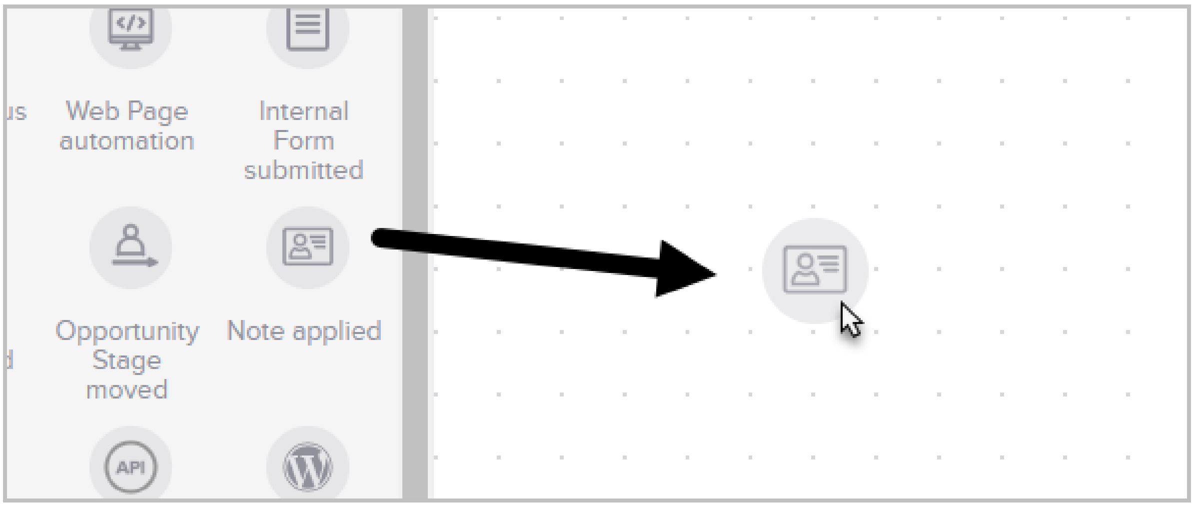
Users can manually add notes to a contact history to document specific interactions such as a phone call, appointment, or meeting.

- Notes include a date stamp and a description of the interaction.
- Interactions can satisfy a goal in a campaign sequence.
- 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 campaign goal are available to users after the goal is configured and the campaign update is published.
- A note can be assigned to only one campaign goal. You cannot reuse campaigns.

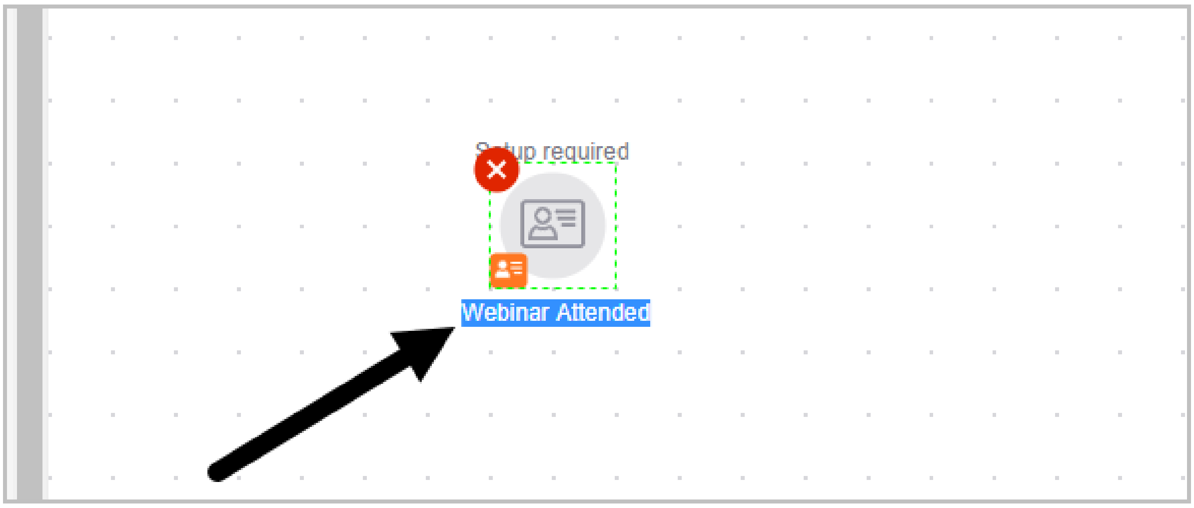
> Be Careful! Goals based on note updates are satisfied whenever a note is added to a contact history.
> - The related sequence(s) begin even if the contact is not in the campaign.
> - Make sure your users can easily identify the notes used as goal methods and that they understand Note Template Goals.

Create a Note Applied Goal

1. Drag a Note applied goal onto the canvas.

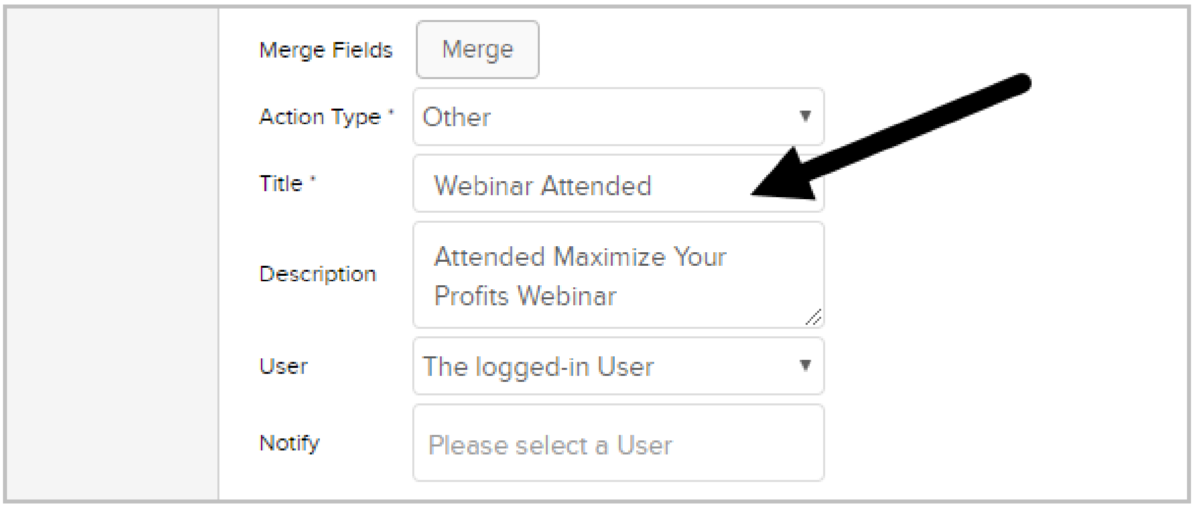


2. Optional: Double-click the name below to icon to choose a new name



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

4. Enter a description



    1. The description becomes a link in the contact history.
    2. Users click on the description link to view creation notes.
    3. Note that users can add custom comments before saving the note to the contact history.

5. (Optional) Attribute this note to a user. The system default attributes the note to the logged in user who uses the note.

6. (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**.