

# 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.

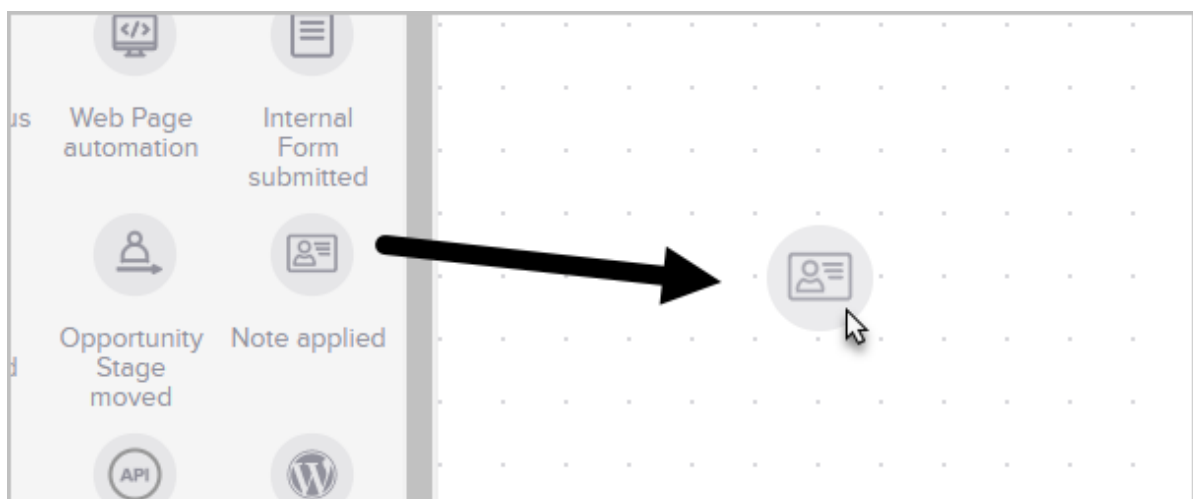
- Notes include a date stamp and a description of the interaction.
- Interactions can satisfy a goal in a campaign sequence.
- If a personal interaction has more than one possible outcome, then create multiple goals, each with a unique note assigned to it.
- Users can use a note to satisfy a purchase 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.

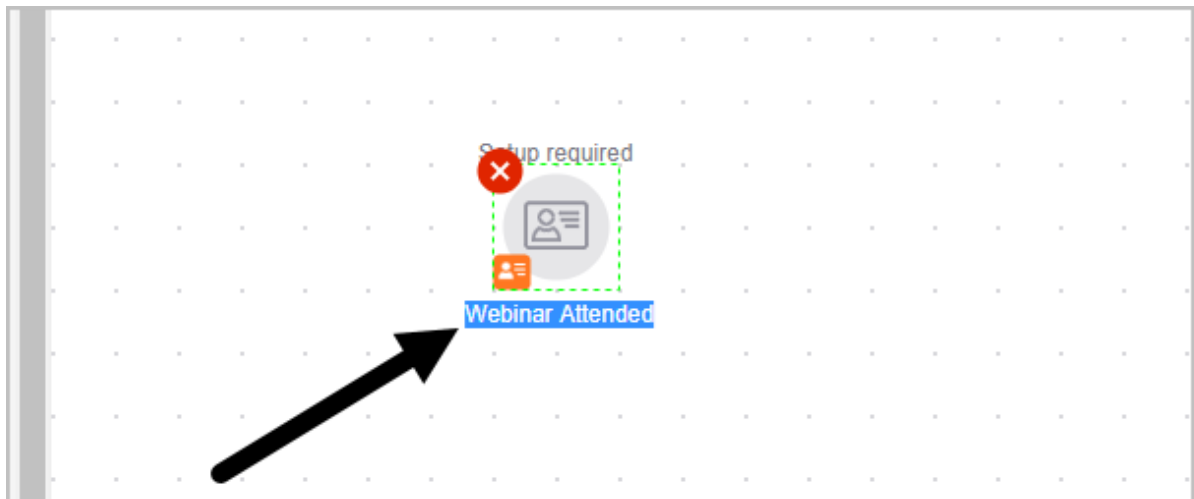
- The related sequence(s) begin even if the contact is not in the campaign.
- Make sure your users can easily identify the notes used as goal methods and that they understand Note Template Goals.

## Create a Note Applied Goal

1. Drag a Note applied goal onto the canvas.



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



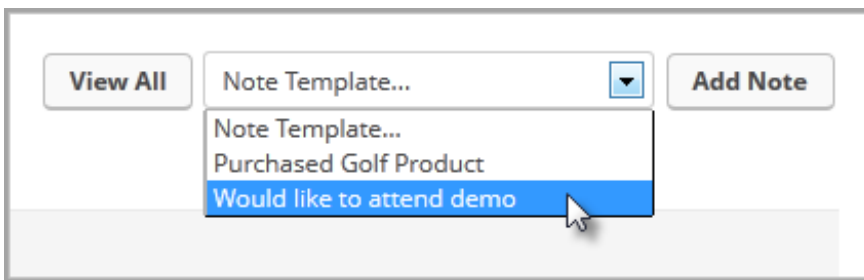
- Double-click the goal and select an **Action Type** from the drop down menu.

- Enter a description

Merge Fields	<input type="button" value="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.
  - To apply a note template:
    - Open the contact record, scroll down to the Notes section, and select the note template from the drop-down.

2. Click **Add Note**.



The screenshot shows a user interface for adding a note. On the left is a button labeled "View All". In the center is a dropdown menu with the text "Note Template..." and a downward arrow. The dropdown is open, showing three options: "Note Template...", "Purchased Golf Product", and "Would like to attend demo". The third option is highlighted in blue, and a mouse cursor is pointing at it. To the right of the dropdown is a button labeled "Add Note".

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