Automate A Task Driven Process

Please Note! We recommend using the online Strategy Guide to source your campaigns. The Strategy Guide is kept up-to-date with the latest campaigns. This campaign may contain legacy content (e.g, legacy emails, legacy landing pages, etc...)

This article provides instructions for launching the Automate A Task-Driven Process campaign that you can download for free from the Infusionsoft Marketplace.

This campaign provides a Note Template an employee can apply to any contact which automatically creates a task.

1. Download the Automate A Task-Driven Process campaign from the Marketplace

2. **Customize the default Note Template**

   The Note Template comes out-of-the-box referencing a 'Task A'. In this part you will customize the Note for the specific task you want it to create.

   1. Double click ADMIN - Task A to edit the Note Template's name.
   2. Replace "Task A" in the goal name with the actual task this Note will create. For example, you could rename the goal to "ADMIN - Send New Customer Cookies" if the task being created is to send a new customer some cookies in the mail.
   3. Double click inside the circle of the Note Template itself to configure the note details.
   4. Update all references to "Task A" with the actual task being performed. Feel free to include extra context in the Description or Creation Notes. For example, using the cookie example from step 2, the Description could be "Need to send new customer cookie kit" and the Creation Notes could be "We need to send the new customer kit with cookies."
   5. Click the green Save button to update the Note Template.

3. **Customize the Task**

   Now that you've customized the Note Template, you need to customize the task that will be created.

   1. Double click on the Task A sequence.

2. Double click on the Task A task.
3. Update all references to "Task A" with the actual task being performed. Feel free to include extra context in the Title or Body of the task. Remember, you can include merge fields to facilitate task completion. For example, if the task is to send cookies to a new customer, you can merge in the customer's mailing address to the task Body so the end-user doesn't have to waste time tracking down that information.
4. Select the user who will be completing the task from the Assign to (backup) dropdown.
5. In the upper right of the page, click Draft to change the task to the Ready status.
6. Click on Back to Sequence in the upper left of the page.
7. In the upper right of the page, click Draft to mark the sequence itself as Ready!
8. Click Back to Campaign in the upper left of the page.

4. **Publish the Campaign**

   All items on this campaign by now should look light green/greyed out (like the Note Template goal). This means we can safely Publish.

   1. Click the blue Publish button in the upper right; this will display a list of all items to be published.
   2. Click the green Publish button at the bottom of this list to publish the campaign.

5. **Begin Automating Task Creation**

   Your campaign is ready to go! The next time you need to create this task, apply the Note Template to someone's contact record. For a tutorial on how to apply Note templates to a contact click here .