Create and apply a standalone note template

Create a standalone Note Template and apply it to a contact record.

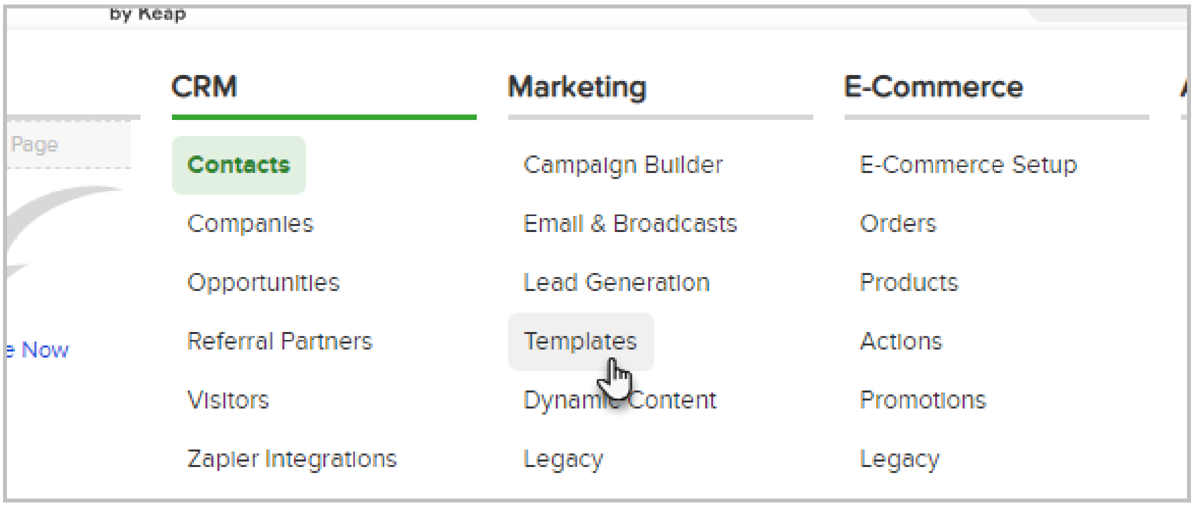
- Use note templates to record personal interactions or events related to a contact record.
- Note templates save time by reducing or eliminating manual follow-up changes.
- Note templates can also be used to initiate automation in Campaign Builder.

There are three types of note templates:

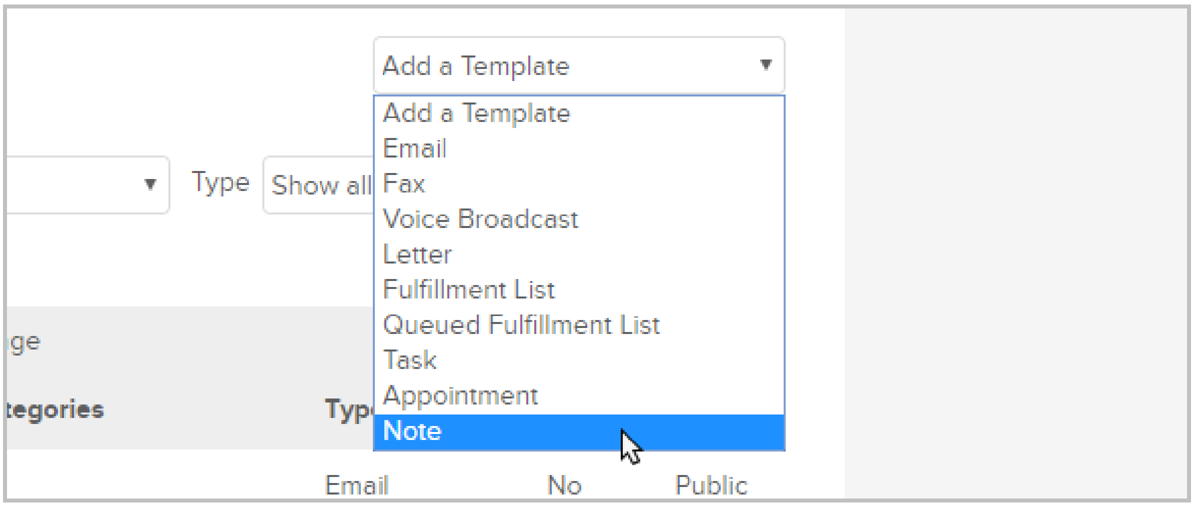
- **Campaign Goal Note Template**: This common note template is set up in Campaign Builder. When applied to a contact, campaign automation begins; it is defined as a Goal in Campaign Builder.
- **Campaign Sequence Note Template**: This note template is set up in Campaign Builder. It does not initiate automation, it automatically adds a note to the contact record as part of a campaign sequence.
- **Standalone Note Template**: This note template does not kick-off campaign automation when applied to a contact record and is not set up in Campaign Builder.

Set Up a Standalone Note Template

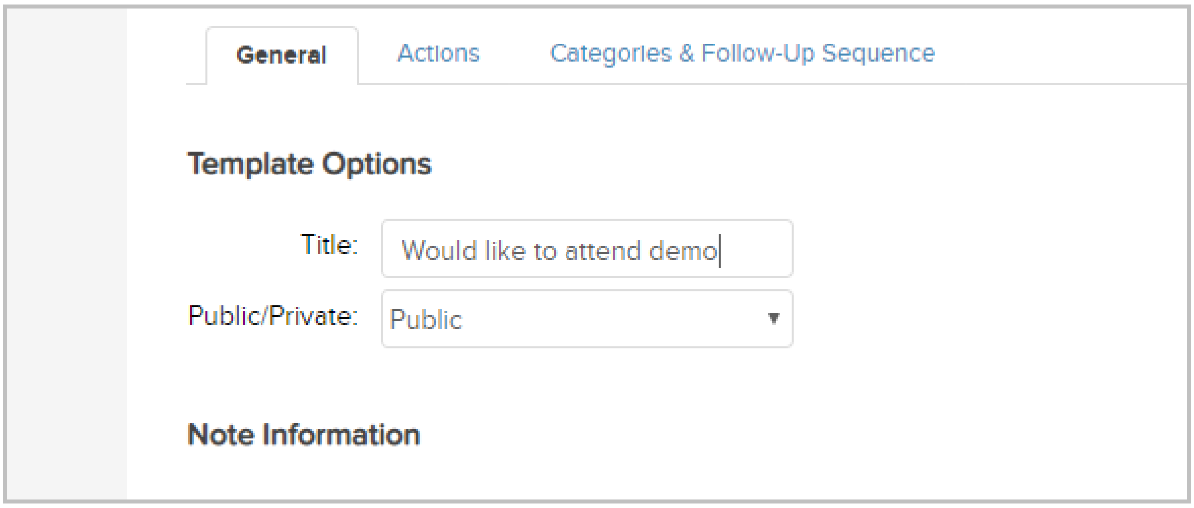
1. Go to **Marketing > Templates** in the main navigation menu.



2. In the Add a Template drop-down, select **Note.**

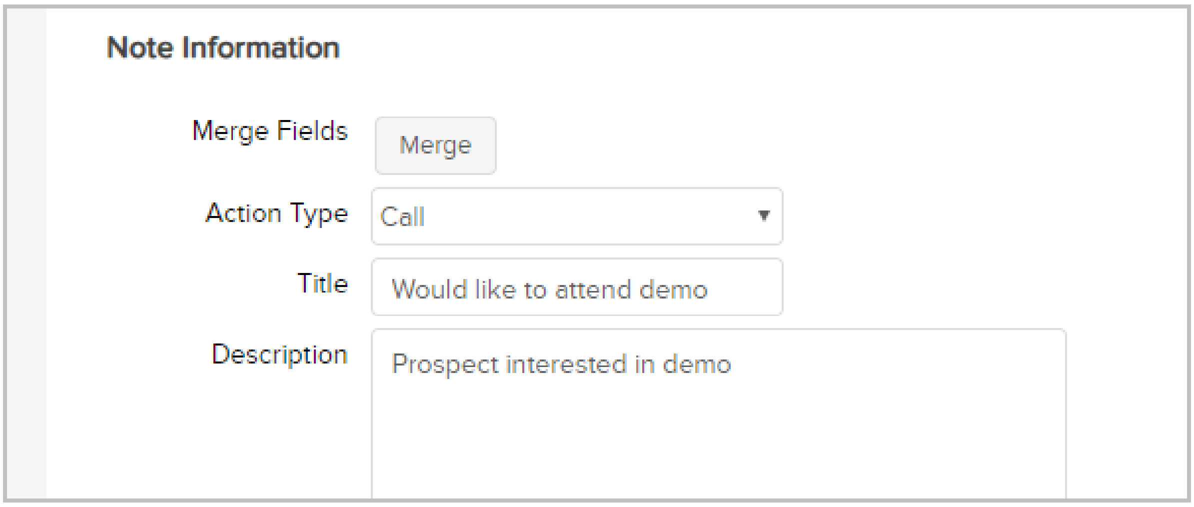


3. Enter a short and descriptive note template title so that it is easy to identify.



4. Choose a privacy option:
   - **Public**: makes the template accessible to other users.
   - **Private**: hides this template from other users.

5. Enter the body of the Note.



- (Optional) **Action Type** - Select a note type from the drop-down. You can customize these options in **CRM > Settings > Task/Appt/Note Settings** .
- **Action Description** - Enter a brief description summarizing the interaction or event; e.g., Qualifying Call - Voice Message. It is visible in the contact record note history.
- **Creation Notes**: Enter the details of the interaction or event.
- (Optional) **User ID**: It defaults to 'Logged In User'. Select an individual if the note template should always be attributed to one specific user.
- (Optional) **Notify these Users**: Select user(s) who want an email when this note is applied.
- (Optional) **Send Notify as Bcc**: Check this box if you do not want each notified user to see all of the other users who are notified.

6. (Optional) Click the **Actions** tab to add one or more action to the note template.

7. (Optional) Click the **Categories and Follow-Up Sequences** tab to assign this template to a category. The categories help organize and filter templates.

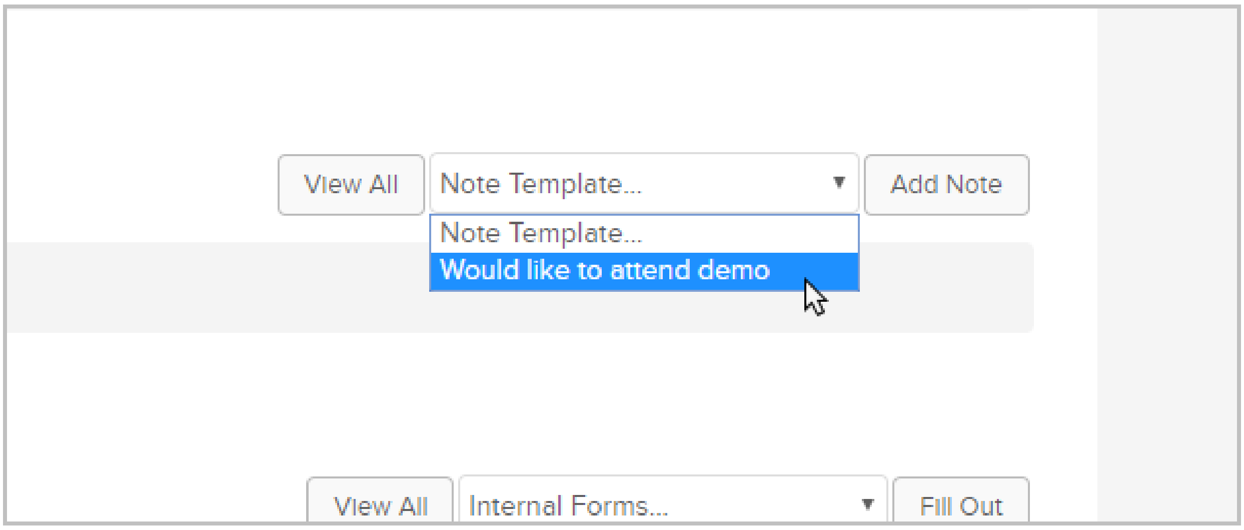
8. (Optional) Click the **Misc. Expense** tab to assign a cost per person to this template. This is not commonly used with note templates, but can include the cost of materials and labor related to the note event or interaction.

9. On the **General** tab, click **Yes** to mark the note ready and make it available to users.

10. Click **Save** to create the note template.

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**.


View All
Note Template...
Add Note
Note Template...
Would like to attend demo
View All
Internal Forms...
Fill Out