

Campaign Goals - Task Completed

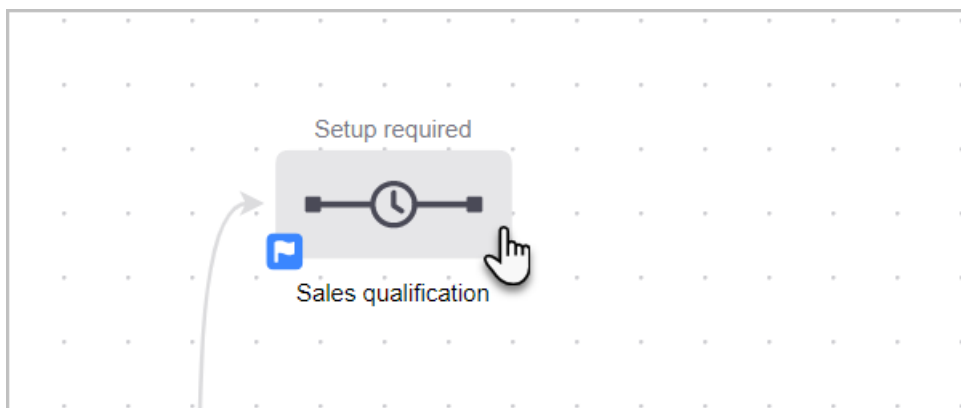
This article applies to:

A task completed goal allows you to require specific tasks be completed before the campaign will continue. Because tasks can have varied outcomes, this goal can be used to create different automation paths depending on the outcome, such as if a lead was qualified or requires more follow up.

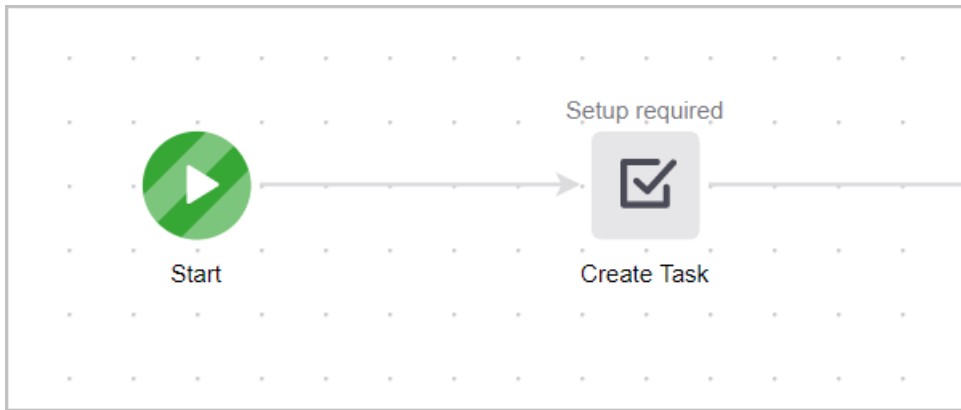
The task completed goal must be preceded by a sequence that contains at least one task. There is no limit to the number of tasks that can be in the sequence or the number of sequences with tasks that precede the goal.

Create automation based on task outcomes

1. Double click the sequence you wish to edit



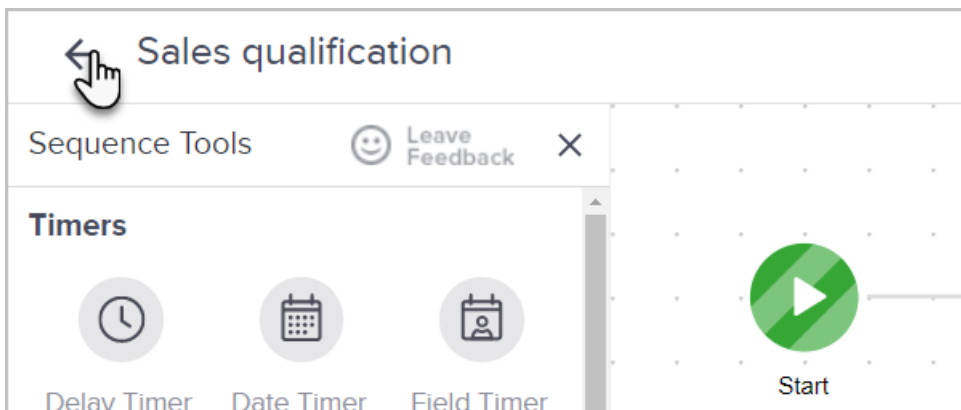
2. Add and configure at least one [Create Task process](#) to the sequence



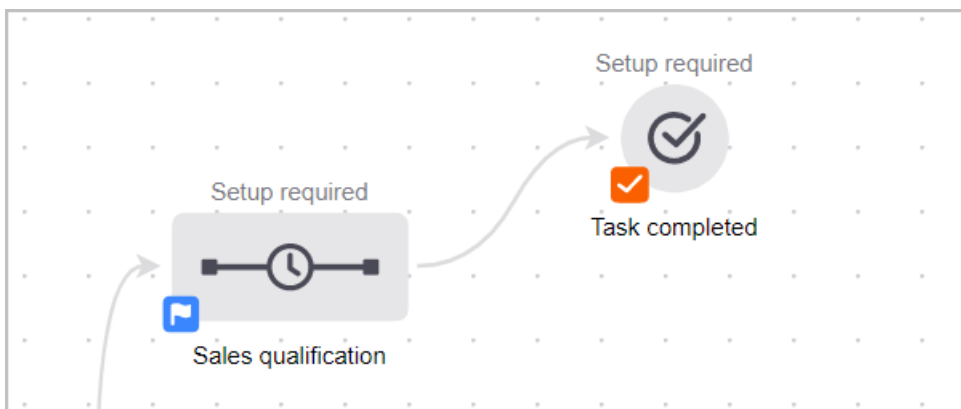
Note: In the Create Task process, ensure you set **Task outcome options** for the task

Learn more.'"/>

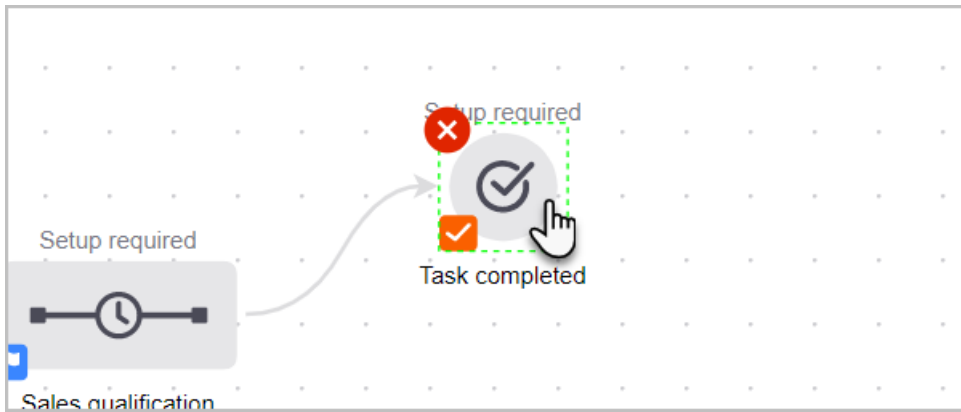
3. Exit the sequence and return to the campaign canvas



4. Drag a task completed goal onto the canvas and connect it to the sequence



5. Double click the task completed goal to configure it



6. Select a task to satisfy the goal

The screenshot shows the 'Task Outcome' configuration dialog. The title is 'Task Outcome' with a subtitle 'This goal is achieved when...'. Below the title, there is a dropdown menu for 'Qualification review' and a 'Task outcome' field. The dropdown menu is open, showing options: 'Select a task', 'Qualification review', 'Client call', and 'Upsell check'. A hand cursor is pointing to 'Qualification review'. At the bottom, there is a '+ And' button.

7. Select task any outcome(s) to satisfy the goal

The screenshot shows the 'Task outcome' dropdown menu. The dropdown is open, showing options: 'or', 'In process', 'Pending', and 'Completed'. A hand cursor is pointing to 'In process'.

8. Add additional tasks to the goal by selecting And or Or

The screenshot shows the 'Task Outcome' configuration dialog. The title is 'Task Outcome' with a subtitle 'This goal is achieved when...'. Below the title, there is a dropdown menu for 'Qualification review' and a 'Task outcome' field. The dropdown menu is open, showing options: 'Completed' and 'Failed'. A hand cursor is pointing to the '+ And' button.

Note: You can't use "And" and "Or" in the same task outcome goal. Instead you can create multiple Task outcome goals, one with "Or" options and one with "And" options.

9. Select an additional task to satisfy the goal

Qualification review

Completed or Failed

and Select a task Task outcome

Select a task

Client call

Upsell check

+ Or

10. Select additional outcomes to satisfy the goal

Completed or Failed

Task outcome

or

Success

Left a Voicemail

11. Click Save

when...

Save

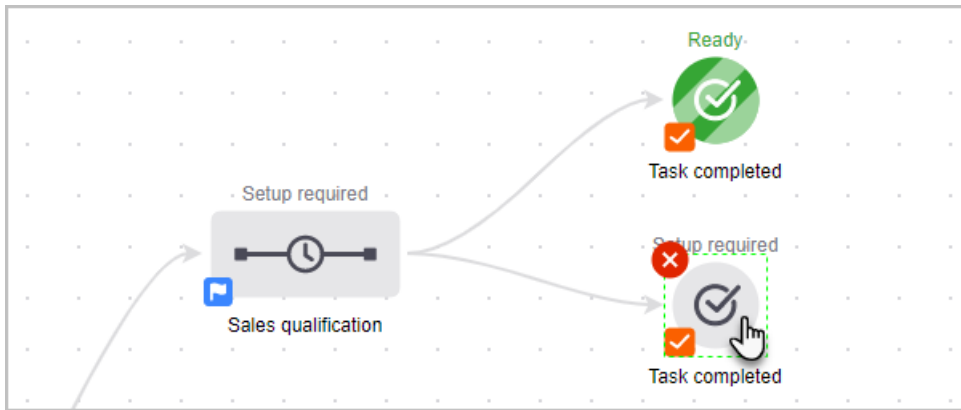
Completed or Failed

Success

Pro Tip! "And" and "Or" options are only clickable when multiple Create Task processes have been created in the preceding sequence.

Create multiple task outcome goals with both "And" and "Or" options

1. Drag a second Task Completed goal onto the canvas and connect it to the same sequence as your first Task Completed goal
2. Double click the task completed goal to configure it



3. Select a task and outcome(s) to satisfy the goal

4. Select And or Or

Client call	Left a Voicemail
<input checked="" type="radio"/> Or	
<input type="radio"/> And	

5. Select additional task(s) and outcome(s) to satisfy the goal

Client call	Left a Voicemail	
or	Qualification review	In process
<input type="radio"/> Or		
<input type="radio"/> And		

6. Click Save

when...	Save			
<input type="checkbox"/>	<input type="checkbox"/> Left a Voicemail	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/> In process	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

