

# Goals - Product Purchased🔗

This article applies to:

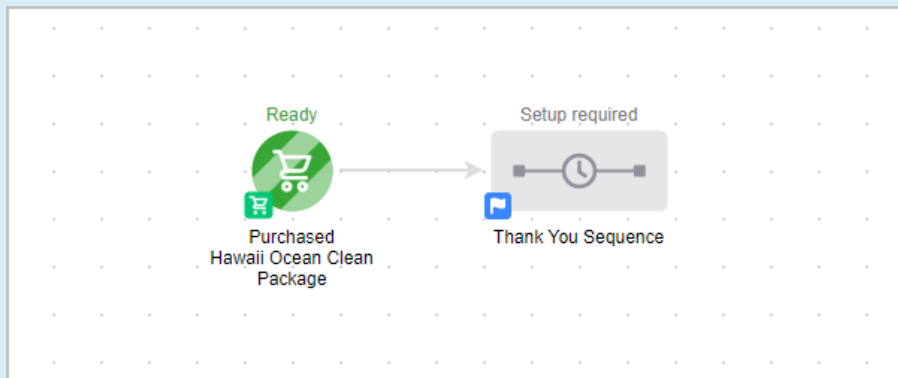
[Max](#)

Purchases are tracked when a prospect or customer buys through an manual order, order form, shopping cart or upon successful payment for orders created through the [API](#). This goal will only be triggered for the products on the order when the first payment is made. (If you need something that will trigger on every payment, you can use [Billing Automations](#)).

## Pro Tips!

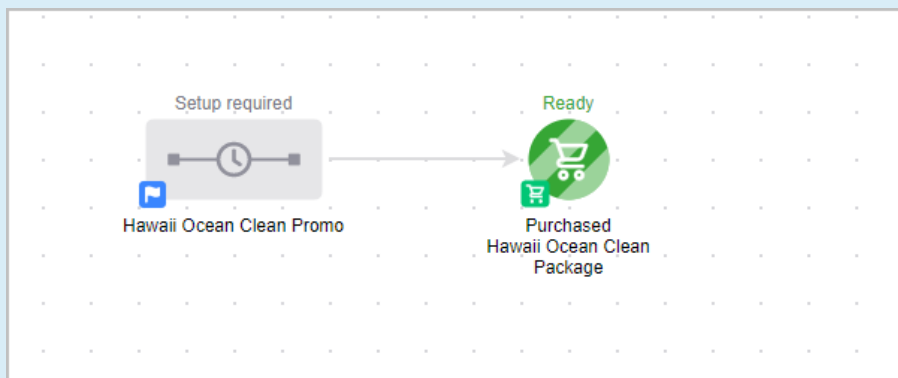
A purchase goal can be satisfied by a general purchase, the purchase of a specific product, or the purchase of a particular category of product.

If the purchase goal comes before the sequence, the contact will move forward when a purchase is made.



If a contact was not added to the automation prior to achieving the goal, they will not enter any of the following sequences. You can change the Purchase Goal to be achieved by **any contact** to include contacts that were not already in the automation.

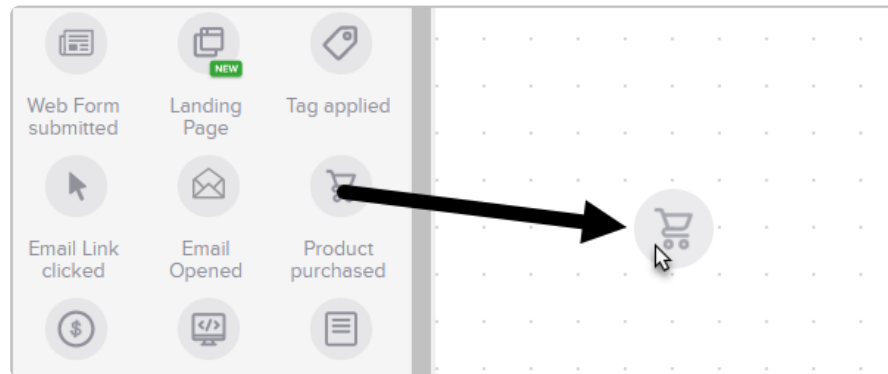
If the purchase goal comes after the sequence, the contact will be removed from the sequence when a purchase is made



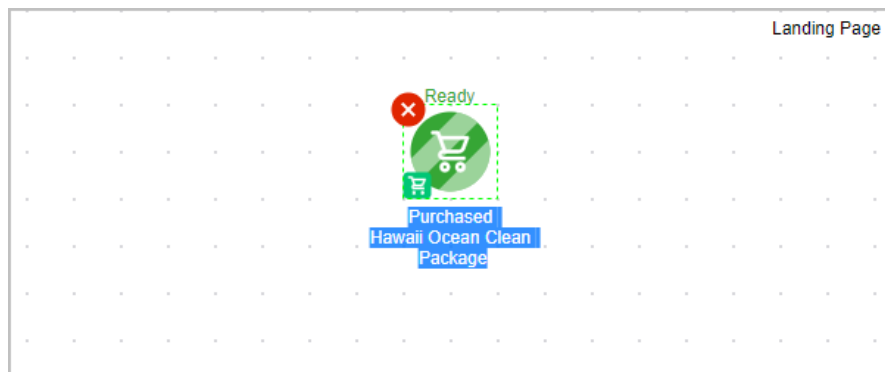
## Goal Setup

1. Click and drag a goal onto the canvas.

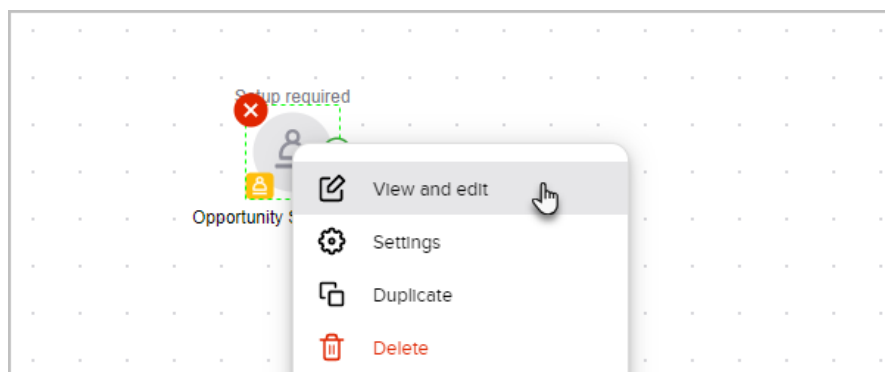
Note that a purchase goal usually comes at the end of an educational/nurture sequence. Once the customer purchases and the goal is satisfied, the previous nurture stops and the post-purchase sequence can begin. For simplicity, the purchase goal is at the beginning of this particular automation



2. You can double-click the name below the icon to customize it.



3. Double-click on the goal or single click and choose View and edit

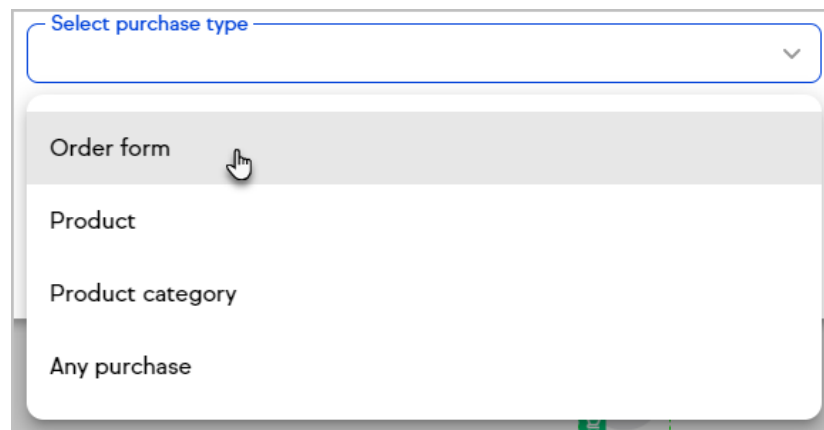


## Configure Purchase

- Select the purchase option that satisfies the goal. You may select multiple items.
  - **Order form:** This option is exclusive to Max Classic and allows you to trigger a sequence when a purchase is made through the selected order

form(s).

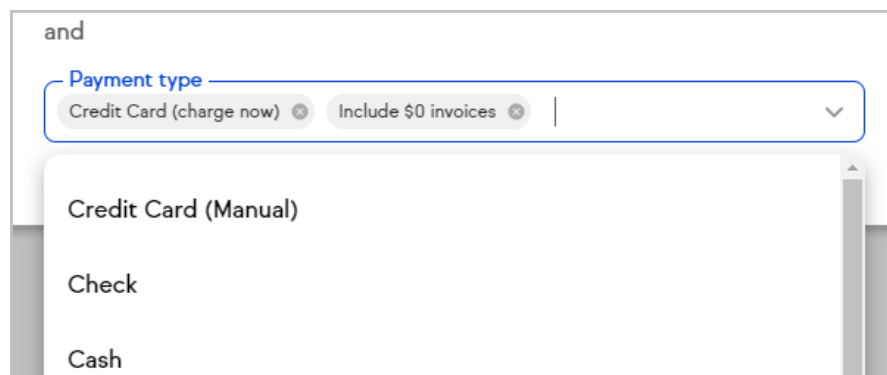
- **Any Purchase:** This option allows you to trigger a sequence when a customer makes any kind of purchase. This is a good option for companies that send generic customer follow-up that is not related to a specific product or category of products.
- **Specific Product Purchase:** This option allows you to send product-specific communications, which can be used to help the customer maximize the value they receive from the product and / or to upsell additional products to them.
- **Product in a Specific Category Purchase:** This option allows you to send customer communications based on a specific category of interest (e.g. live event promotions to people who like to attend seminars.)



A screenshot of a user interface showing a dropdown menu for 'Select purchase type'. The dropdown is open, displaying four options: 'Order form', 'Product', 'Product category', and 'Any purchase'. A mouse cursor is hovering over the 'Order form' option. The dropdown has a blue border and a downward arrow icon on the right side of the header.

## Payment Types

1. Select the payment type(s) that satisfies the goal or select **Any payment types**



A screenshot of a user interface showing a dropdown menu for 'Payment type'. The dropdown is open, displaying three options: 'Credit Card (Manual)', 'Check', and 'Cash'. Above the dropdown, there is a header 'and' and a blue-bordered box containing the text 'Payment type'. Below this box, there are two tags: 'Credit Card (charge now)' and 'Include \$0 invoices', both with an 'x' icon to remove them. A downward arrow icon is visible on the right side of the dropdown menu.

2. Click **Save** to apply the purchase option that satisfies the goal