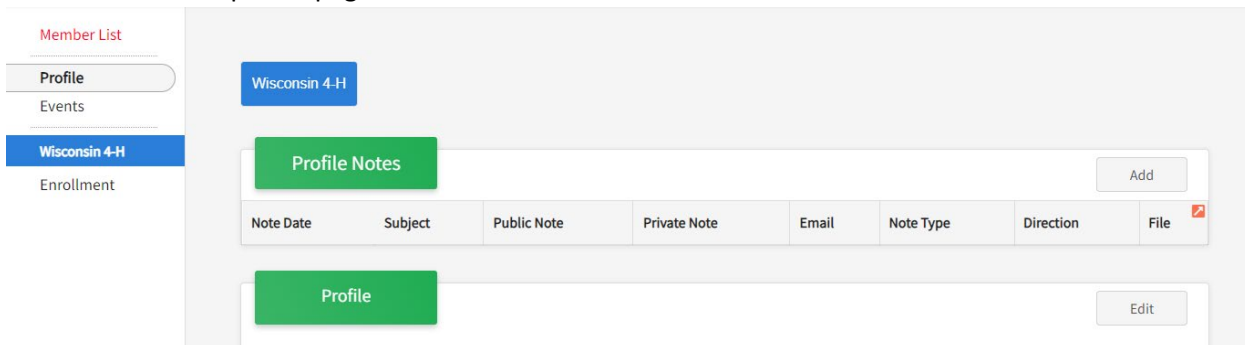


Background

There are times when you need to add a note to a member record or a family profile that is not related to an enrollment or there isn't a current enrollment where a note can be saved. A profile note is a great place to save this.

Creating Member Profile Note

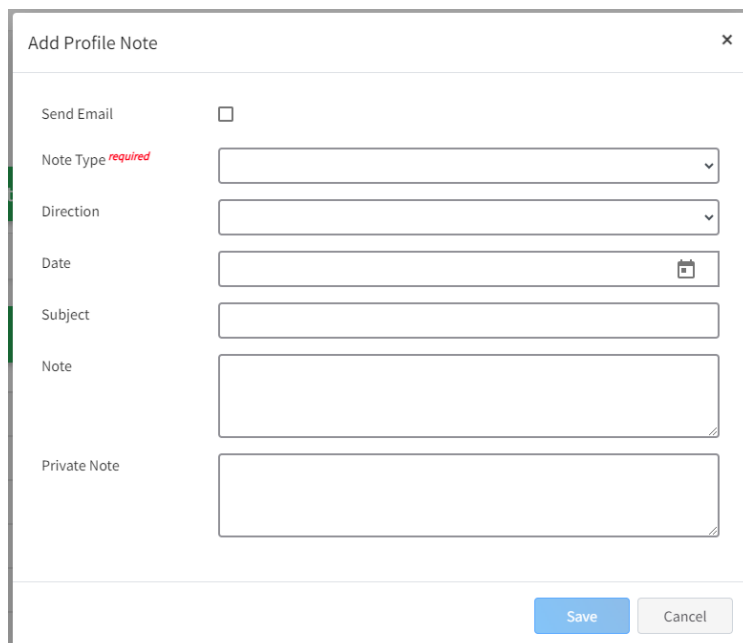
1. Go to the member's profile page.



The screenshot shows a member profile page with a sidebar on the left containing 'Member List', 'Profile', 'Events', 'Wisconsin 4-H', and 'Enrollment'. The main content area has a 'Wisconsin 4-H' button, a 'Profile Notes' section with an 'Add' button, and a table with columns: Note Date, Subject, Public Note, Private Note, Email, Note Type, Direction, and File. Below the table is a 'Profile' section with an 'Edit' button.

2. Click on the Add button in the Profile Notes area.
3. Enter the information in the Add Profile Note window.

- a. Send Email – will send an email to the member when the note is created
- b. Note type – Email, Other, Phone, or Text
- c. Direction – Incoming or Outgoing
- d. Date – if left empty will default to today
- e. Subject – short description of the note
- f. Note – this is a public note that the family will be able to see
- g. Private Note – this is a note that only Managers will be able to see. The family cannot see this note.
- h. Click the Save button to save the note.



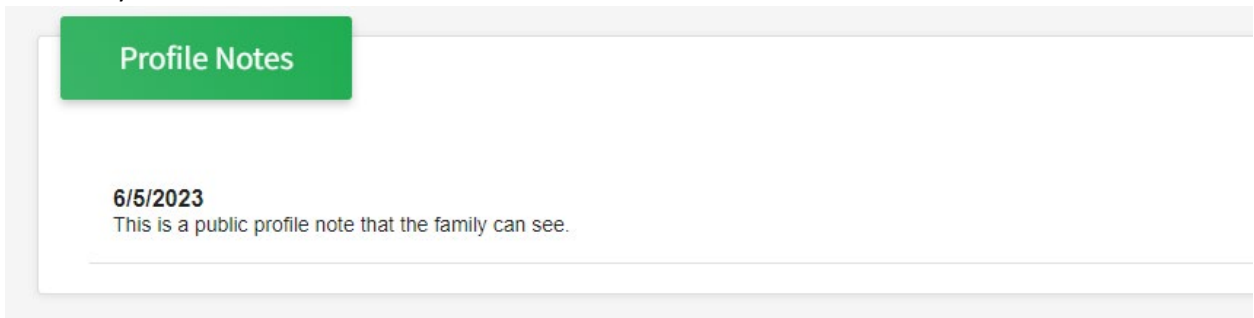
The 'Add Profile Note' window contains the following fields: 'Send Email' (checkbox), 'Note Type' (dropdown menu, marked as required), 'Direction' (dropdown menu), 'Date' (calendar icon), 'Subject' (text input), 'Note' (large text area), and 'Private Note' (text area). At the bottom are 'Save' and 'Cancel' buttons.

- After the note has been created, this is how it will appear at the top of the member profile.

The screenshot shows a table titled "Profile Notes" with an "Add" button in the top right corner. The table has the following columns: Note Date, Subject, Public Note, Private Note, Email, Note Type, Direction, and File. A single row of data is visible.

Note Date	Subject	Public Note	Private Note	Email	Note Type	Direction	File
6/5/2023	This is a Sample Profile Note	This is a public profile note that the family can see.	This is a private profile note that the family cannot see.		Other	Outgoing	<input type="checkbox"/>

- The family sees the note like this.



- You can search for the profile note in custom reports. The fields are in the Member area and the names start with "Member Note".

Adding An Attachment To A Note

After you have created the profile note, you can add an attachment to the profile note.

- Open the profile note and scroll to the bottom.
- Click on the Upload button.
- Select the file and click on the Open button.

After the file has been uploaded, you can download the file later to view it.

Creating A Family Profile Note

Family profile notes are created in the same way except you go to the family profile screen. This is the screen where you would reset the family login password, change the family email address, phone number, or street address. The steps are the same once you are on the screen.

