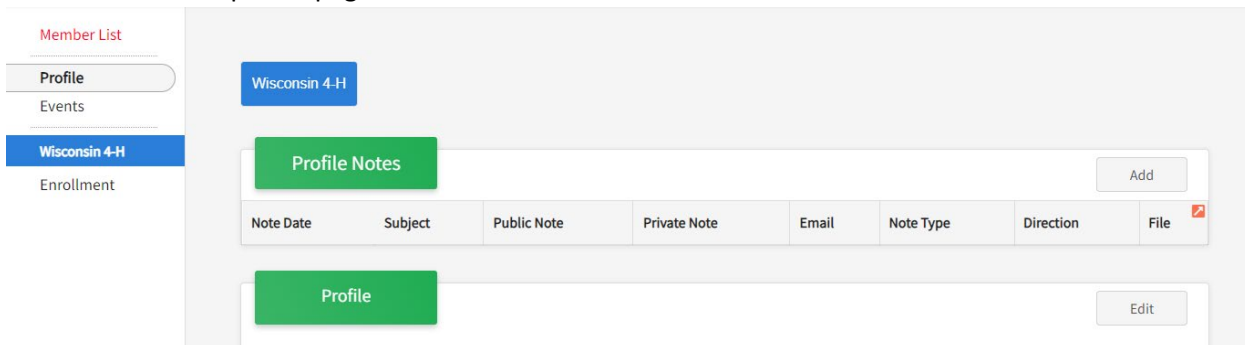## Background

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.
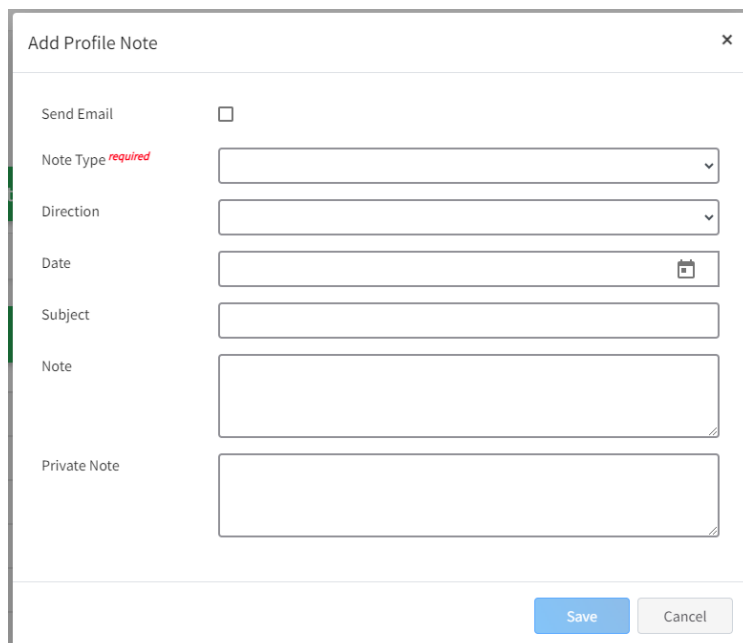
Creating Member Profile Note

1. Go to the member's profile page.

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.
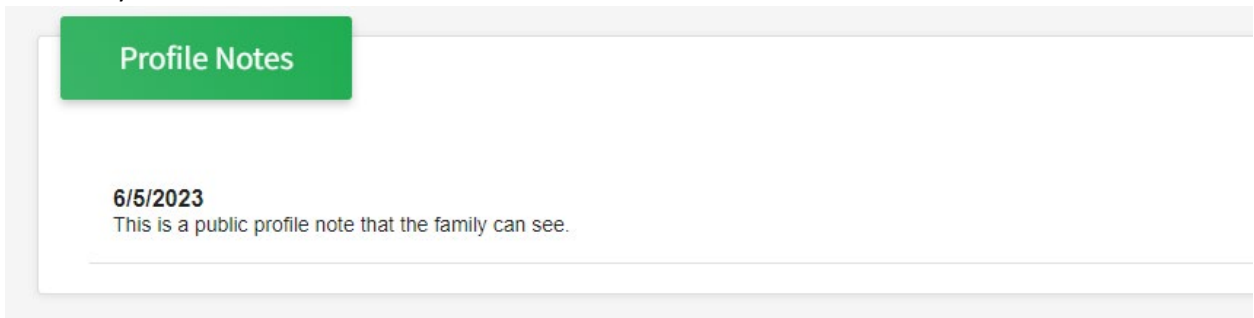   h. Click the Save button to save the note.

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

5. The family sees the note like this.

6. 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.

1. Open the profile note and scroll to the bottom.
2. Click on the Upload button.
3. 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.

4-H Online 2.0 Member and Family Profile Notes