

## Member Notes

### Add

With the member displayed, select one of the following:

- Folders (below suffixes) > Add > Notes.
- Select the Notes folder > Add.

The Add Member Note window is used to add a new note to the system for a member. The note option can be used for a variety of purposes determined by the credit union. This is a place to add information onto the system concerning the member that can be viewed as needed by the staff. A maximum of 999 different notes can be entered for each member.

The system displays.

**Description:** (Optional) Enter a brief description for the note, such as the suffix, subject or area to which the note pertains. Maximum spaces allowed is 25.

Enter the information for the note.



#### Important





For printing purposes, press enter after each sentence. Otherwise, the note will be one continuous line of information and won't fit on the page when printed. The maximum spaces on one printed line or sentence is 95. A maximum of **255 spaces** is allowed for the note.

Select the Add button to add the note to the system.

The Notes icon now displays on the Member Summary window. Changes can be made to notes on the system by selecting the specific note. A box will display to enter the changes.

## Display

From the Member Summary window, select Notes. This selection will only display, if a Member Note has been entered for this member.

Notes			
↑ Up One Level   + Add   ✕ Remove			
DATE	TELLER	DESCRIPTION	NOTE
 05-17-2012	#003	Legal Papers on File	Durable Power of Attorney papers on file naming Karen L. Smith POA for Amy.
 07-01-2004	-		Marriage license on file.
 06-15-2004	-		A/K/A Amy Marie Johnson
 05-01-2003	-		Member is diabetic. Contact Beth at 555-5555, if problems.

The notes for this member are displayed. The notes are sorted automatically by date with the most recent note displaying first then on down to the furthest date in the past. The date could represent the date the note was added or the date that the note was changed.

If a note contains more than one line of information, only the first line in the note will be displayed in the above window. Double click on the specific note to view the entire note.

The system will automatically fill in the teller number of the employee adding a new member note. Also, if a Member Note is changed, the teller number of the last teller to make a change will be displayed in the Teller column. Each time a Member Note is changed, today's date will be entered by the system for that note.



### Note

If a dash shows in the Teller column that means that the member note was added prior to the Teller column being added.

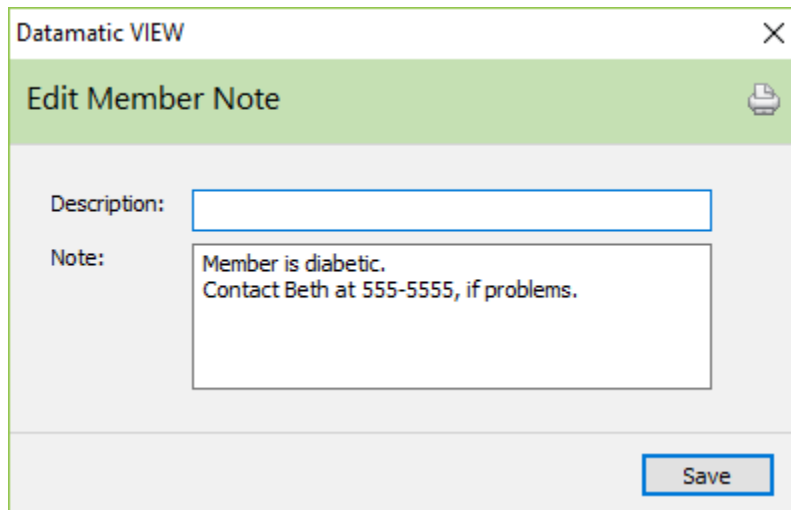
This window can also be used to set up a new note. Highlight the designated area and press enter or double click on the designated area to display the Add Member Note window.

## Edit and Delete

To make changes to a member note, select the specific note. The Edit Member Note box is displayed.

To delete a member note, highlight the note to be deleted and press the delete key. A confirmation box will be displayed. To proceed with deleting the note, select yes. Otherwise, select no.

### Edit Member Note



The screenshot shows a window titled "Datamatic VIEW" with a close button in the top right corner. Below the title bar is a green header area with the text "Edit Member Note" and a print icon. The main content area is divided into two sections: "Description:" followed by an empty text input box, and "Note:" followed by a text area containing the text "Member is diabetic. Contact Beth at 555-5555, if problems." At the bottom right of the window is a "Save" button.

Select Save, after making any needed changes.

The Date and Teller of the last change do not show on the Edit Member Note window. These two items only show in the list.

# Print

The **Print All Notes** selection has been added to the Right Click Menu in the Notes Folder. This will allow a user to print a formatted listed of all Notes.

Member Notes - 12355-4 Jon Lester			
Programming CU - Monday, February 10, 2020 11:57 AM			
DATE ADDED	TELLER	DESCRIPTION	NOTE
05-30-2019	#025	70 Draft Account	Returned 3 overdraft fees to this member since the account was overdrawn due to an encoding error.
05-30-2019	#025	FILE MAINTENANCE (00)	Action Code: The action code was set incorrectly when the account was opened.
05-30-2019	#025	FILE MAINTENANCE (00)	E-mail Address (Primary): Incorrect email address was entered.
05-30-2019	#025	FILE MAINTENANCE (02)	IRA Contribution 2017 for 2017 Contribution: Additional information is in file.
05-30-2019	#025	FILE MAINTENANCE 00 END X	Action Code: This is a test for file maintenance notes.
05-30-2019	#025	Loan Application 05	This is a note. This note does not have carriage returns in the text box. I'm testing what happens when we just keep typing in this text box because it would be really nice to print this without the user knowing they need carriage returns. EOM
12-18-2017	#025	Loan Application	This is a note....
12-18-2017	#025	FILE MAINTENANCE (00)	Checks Ordered: Confirmation Number: 12345678910 This is a test for line 3 This is a test for line 4 This is a test for line 5
12-18-2017	#025	FILE MAINTENANCE (00)	Checks Ordered: 67888
02-28-2017	#025	FILE MAINTENANCE (00)	Action Code: This is to test the send on a note