Viewing Member History and Notes

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Quick Steps: Members > Members Listing > View Member Record > History or Notes

Viewing Member History:

1. Within the Management Console, select **Members** from the top menu, then **Members Listing** from the left menu.

2. Search for the member using the **Basic** or **Advanced Search**

3. Click on **History** next to the member's name or click on the members name and the **History** button within the members profile.

4. The **Summary** tab is the default view and will give you an overview of the activity of that member.

5. Use the tabs to view the breakdown in each area, and then the **View** button, if available, to view more detailed information.

- The following interactions are available for viewing in the Member History page:
- Subscription Payments
- Shop Orders

- Notes
- Email Messages
- Registrations, including Events entries
- TicketDesq Purchases
- Reserved Seating History
- Contact Us Enquiries made through the Members Portal

The Summary tab is a great way to calculate the total spend a member has made with your organisation. Don't forget to use the **View** button next to any information in the Member History to view more detailed information about the member's interactions with the database.

Viewing and Adding Member Notes:

1. Within the Management Console, select **Members** from the top menu, then **Members Listing** from the left menu.

2. Complete a **Search** for the member, then click **View** next to the member's name

3. From the Member Detail page, click on **Notes** at the top of the screen

4. On the Notes page, click on **Add Notes**. Select the appropriate **Note Type** from the drop down menu and then create your Note

5. When done, click on **Add Note** and your Note will now be attached to the Member.

Notes can be used to record notes against members, such as qualifications, issues, complaints, suspensions, feedback etc. These can be categorised via Note Types which are set up in Member Options (see Step 1: Setting up your Member Options)

You can set up as many Note Types as you need within the Member Options area, you can also export Notes against members in the Export area using the Notes Export. Notes will always be time and user stamped at the time of entry.

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