

How do I view, edit or delete a member note?

Last Modified on 04/04/2024 1:41 pm AEDT

GameDay administrators can view, edit, or delete Member Notes on an individual member record.

Note: Depending on your hierarchy level, you may not have access to this functionality as higher-level organisations can restrict these features from other users.

To view, download, edit, or delete a document on a member's record:

1. In the left-hand menu, click **Members** > **MEMBERS**

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	Dashboard							
С. С.	My Organisation	•						
\$	(\$) Finances							
888	Members	•						
Mer	mbers							
Clea	Clearances							
Cor	Communications							
Rer	Renewal Campaigns NEW							
	Membership Forms	•						
00	Products & Questions							
₹ <u>}</u>	Promotions							
Ø	Events	•						
¢	Reports							

2. Search for the relevant member, then click $\ensuremath{\textbf{VIEW}}$

Members	0							
Members	s List By Produc	ot Add-on Pro	oducts By Me	ember Type Bi	y Organisation By Season	Financial Filter	Pending	>
Create N	lew Member				Gender at Birth 💌 🛛 All Ge	ender Identities 🔻	Q Search Member Name	Ø
Photo	Name 🗢	First Name 🌲	Last Name 🌲	Gender at Birth	Gender Identity	Birthdate 🗢	Mobile	Action(s)
(the second sec	April Jones	April	Jones	Female	Non-binary/gender fluid	09/04/2008	+61400100200	View
\approx	Ben Hollands	Ben	Hollands	Male	Male	18/06/2009	+61400100200	View
3	Con Stanley	Con	Stanley	Male	Male	08/12/2005	+61400100200	View
\approx	Corey Hills	Corey	Hills	Male	Male	01/06/2009	+61400100200	View

3. Click on the **DOCUMENTS & NOTES** tab

Member Details	Member Activity	Orders/Transactions	Memberships	Events	Add-on Products	Documents & Notes
Basic Details	Parents/Guardian Details	Emergency/Medical Details	Preferences	Other		
Legal Name *	April Jones					
DOB(Age)*	09/04/2008 (15)		•			
Gender	Female		•			

4. To view a member note, click **VIEW**

Г

Add Document						Q Search for	•
Name	File Type	Size	Category	Source	Date/Time Added	Date/Time Updated	Action(s
Administrator Certification	png	77.68 KB	Certification	Admin	March 15th 2024, 11:22 am (AEDT) 🊯	March 15th 2024, 11:22 am (AEDT) 👔	View 🗸

A pop-up will appear to see information and documents related to the member note



5. To edit a member note, click the arrow to the right-hand side of the note and click **EDIT NOTE**

Documents	Notes					
Add Note					Q Search for	Ö
tle	Text	Document Added	Туре	Date/Time Added	Date/Time Updated	Antion(a)
ut Allergy (Cannot eat anything with nuts and carries an epipe	No	Medical	April 4th 2024, 1:31 pm (AEDT) 🚯	April 4th 2024, 1:31 pm (AEDT) 👔	V Delete No

A pop-up will appear for you to edit information related to the note

Note Title *	Nut Allergy
Note Text *	Cannot eat anything with nuts and carries an epipen at all times
Related Document	
Note Type *	Medical 🔹
Viewable By *	Only this organisation 💌
Editable By *	Only this organisation 💌

6. To delete a member note, click the arrow to the right-hand side of the note and click **DELETE NOTE**

Member Detai	ils Member Activity Orders/Transacti	ons Member	rships	Events Add-on Produ	cts Documents & Notes	
Documents Add Note	Notes				Q Search for	¢
Title Nut Allergy	Text Cannot eat anything with nuts and carries an epipe	Document Added	Type Medical	Date/Time Added April 4th 2024, 1:31 pm (AEDT) 🕤	Date/Time Updated April 4th 2024, 1:31 pm (AEDT)	Edit Note
Show 5 × Showing rows 1-1 of	1	K	< 1	> >		

A confirmation box will appear to confirm you want to delete this note. Click **YES**



Related Articles