Setting up Member Notes

Why

When you set up [Member Notes Types](#), you enter a **Note type**, **Category**, and up to three **Elements**. Setting up these fields correctly helps you easily track virtually any type of information about your members. The **Note Type** should be broad and generic, but as you break notes down into categories and elements, you can make the fields more specific.

> ⚠️ It's important to consider the types of information that you want to track when setting up your Member Note Types. We suggest brainstorming the information you want to track with your team and determining which note types, categories, and elements you will need before attempting to set them up in Membership Plus.

How

To get you started, click the tabs below to view some examples of how you can use member notes to track information about individuals, families, and groups associated with your church.

Notes for Volunteers

Suppose you want to set up Member Notes for the volunteers at your church. You would enter a **Note Type** of volunteers. For categories, you could list the different volunteer opportunities offered at your church, such as Child Care, Administrative, and Kitchen Duty. Then you can use elements to define which area of the church volunteers serve, volunteer's availability, and if the volunteer is active.

Example:

Note type: Volunteers
Subject: Volunteer
Category: Child Care
Element 1:Nursery
Element 2: Wednesdays Only
Element 3: Active

Pastoral Notes

Since each Note Type can be secured per user, you can use Member Notes for pastoral interactions such as counseling, because only the Pastor has access to see them. With a **Note Type** of pastoral, you could set up a counseling **Category**. In the **Element** fields, you could list the types of counseling (Grief, Premarital, Addictions), the reason for counseling (Loss of a child, loss of parent), and if the individual is actively being counseled.

Note Type: Pastoral
Subject: Meeting Notes
Category: Counseling
Element 1: Grief
Element 2: Loss of a Child
Element3: Active

Notes for Spiritual Gifts and Talents

Let's say you want to set up Member Notes for your members' spiritual gifts and talents. After you enter a **Note Type** of Gifts/Talents, you can define two categories: Gifts and Talents. Then, you can define elements based on the name of the gift and if the member actively participates.

Example:

Note Type: Gifts/Talents
Subject: SGTT
Category: Gift
Element 1: Teaching
Element 2: Special Needs
Element 3: Active

for Outreach

Another area you can track with Member Notes is Outreach. You can set up a **Note Type** of Outreach, then set up **Categories** such as Invitation. You can set up **Elements** for the type of invitation (sent card, phone call, e-mail), the event the invitation is for (VBS, Revival, Singing), and the year the outreach was made.

Example:

Note Type: Outreach
Subject: Growth
Category: Invitation
Element1: Send Card
Element2: VBS
Element3: 2010

for Member Development

You can also use Member Notes to track your church's member development, such as catechism or confirmation classes. Using a **Note Type** of Member Development, you could define categories such as catechism or confirmation. For **Elements**, you could list the class year, the class date, and if the member is an active participant.

Example:

Note Type: Member Development
Subject: Development
Category: Catechism
Element 1: First Year
Element 2:Sunday
Element 3: Active

for Staff Development

Staff development is another important aspect you can track in Member Notes. For example, you could enter a **Note Type** of Staff Development, then enter **Categories** such as Training, Certification, Licensure, and Ordination. For **Elements**, you can enter types of development or training and whether the development is scheduled, in progress, or complete.

Example:

Note Type: Staff Development
Subject: Educational
Category: Training
Element 2: Membership Plus Accounting 101
Element 3: Scheduled

Related Links

- Member Notes
- Manage Note Types
- Managing Access Rights of Member Notes