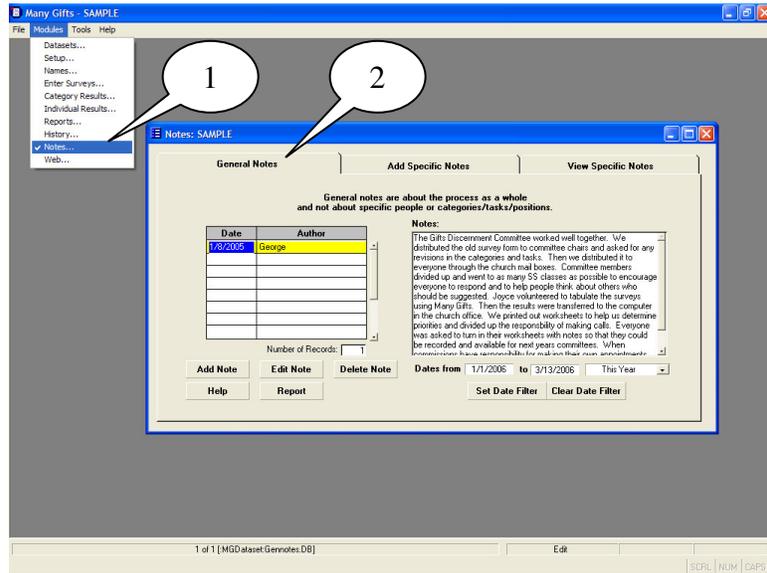


## Using Notes

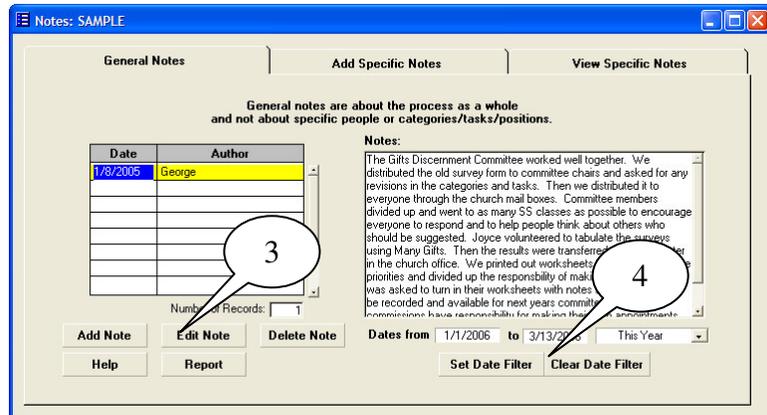
If people are contacted about various tasks, it can be extremely valuable to preserve a record of those contacts for the next year. Many Gifts provides a systematic way for recording these notes. General notes can be created for the general process. Specific notes can be associated with a name, a category and a position. A note associated both with a person and a position would show in a report on that person or on a report about that position. This is particularly valuable to record that someone is not able to participate this year but is willing to participate the following year.

Notes should be used in connection with the History module. Both Notes and History can also be entered by right-clicking on a name in the Category Results module.

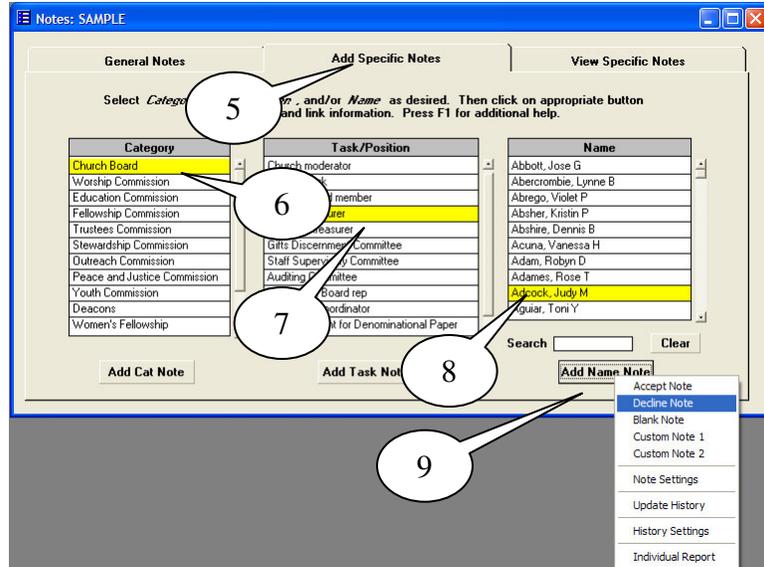
1. From the **Modules** menu select **Notes**.
2. Select **General Notes** tab to enter or view general notes about the process as a whole (and not about a specific person, category, or task).



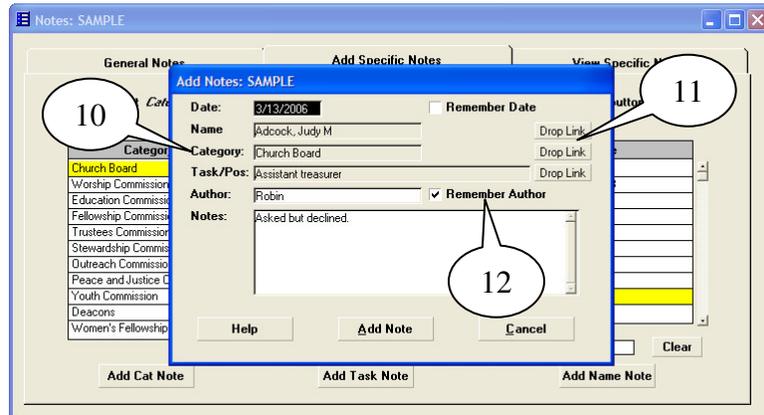
3. **Add, edit, or delete** a general note.
4. **Filter** the display of notes by setting a date range. Click **Help** for more information.



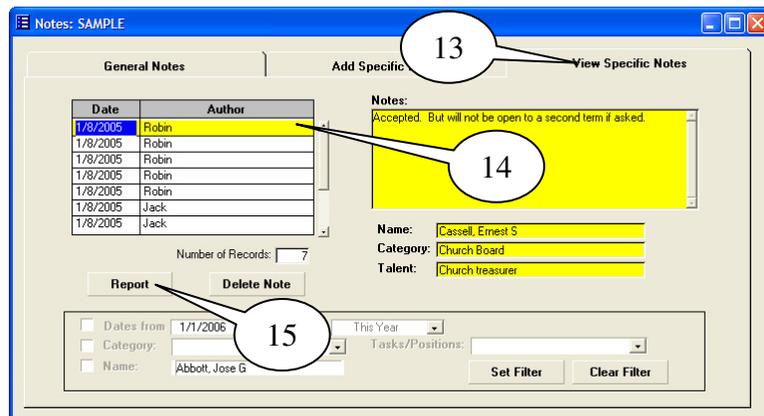
5. Select **Add Specific Notes** tab.
6. Select a **Category** (if desired).
7. Select a **Task** (if desired).
8. Select a **Name** (if desired).
9. Click on **Add Names Note** (or other option) and select option from drop down menu. (Use **Note Settings** to change defaults.)



10. In this example the note will be associated with a name, category, and task. Change the actual note as desired.
11. Click on any **Drop Link** button to drop a link.
12. Check a **Remember** box if you want the same **Date** and **Author** for a subsequent note.

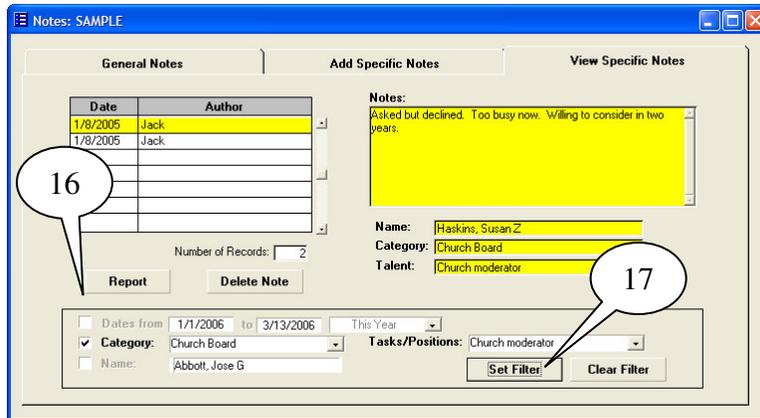


13. Select the **View Specific Notes** tab to look at notes or prepare a report.
14. The **Note** corresponds to the highlighted **Date** and **Author**. The links also show.
15. Click on **Report** to produce a report for all notes in the table.



16. To view only certain notes, select criteria by checking the appropriate box and defining criteria.

17. Then click on **Set Filter** to restrict display. Click **Clear Filter** to restore all notes.



18. Sometimes it is easier to enter notes by right-clicking on a name in the **Category Results** module.

