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How to assign officers

Mickey D. - 2023-02-08 - Officers

You are able to add Officers and assign specific positions to members per term. Before following the steps below, ensure that you have all the <u>officer positions</u> defined.

Assigning Officers

- 1. Click **Settings** or the **Gear** icon on the left menu.
- 2. Click **Manage Officers** in the Membership Management section.
- 3. The Officers page displays. You can add, edit and remove officers through this page. You could also search and export officers if needed.

Add an Officer

- 1. Click the Add button near the right.
- 2. Fill in the fields displayed to add a person as a officer.
 - Position Select the position for the officer.
 - **Member** Enter the person's name or email address, then select the person.
 - **From -** When the officer's position starts.
 - **To -** When the officer's position ends.
- 3. Click **Save** once done.

Edit an Officer

- 1. Click the **down arrow** on the same row as the officer you would like to edit.
- 2. Click **Edit** from the drop down options.
- 3. You will see four fields:
 - **Position** The position the officer holds.
 - Member Name Enter the person's name or email address, then select the person.
 - From When the officer's position starts.
 - **To** When the officer's position ends.

4. Click **Save** to save the changes.

Remove an Officer

- 1. Click the **down arrow** on the same row as the officer you would like to remove.
- 2. Click **Delete** from the drop down options.
- 3. Click \mathbf{OK} to confirm removing the person from the position.

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