How to assign officers

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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 officer positions 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.
    - **Title** - Enter the officer's title.
    - **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.
    - **Title** - The title of the officer.

- **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 **OK** to confirm removing the person from the position.

Related Content

- How to update officer settings and account positions
- How to update the finance settings