Help Articles > Administrator Help > Officers > How to update officer settings and account positions

How to update officer settings and account positions

Mickey D. - 2023-02-10 - Officers

In order to add Officers and assign specific positions to members per term, you have to create the Officer Position.

Officer Settings

1. Click **Settings** or the **Gear** icon on the left.
2. Click **Officers Settings** in the Membership Management section.
3. The Officers Settings page will display. There are two areas on this page:

Settings

- **Title** - Name of the list of officers as per your organization's preferences. E.g. Executives, Officers, etc.
- **Start Month** - The month when the officer positions start.

This Account Positions

This section allows you to add, edit, or remove officer positions. You will see the following columns:

- **Name** - Title of the position.
- **Code** - Code of the position.
- **Maximum Number**- The maximum number of people who can be in this position for the term.
- **Allow Empty** - Allows the position to be empty.
- **Roles** - Automatically assigns the listed assigned roles when the person holds the position. E.g., If there is a position name Website Administrator, the assigned role given would be Website Editor. This way the person would be able to manage the website.

Add a Position

1. Click the **Add** button near the right.
2. In the pop up, you will have these options:

- **Name** - Title of the position.
- **Code** - Code of the position.
- **Maximum Number**- The maximum number of people who can be in this position for the term.
- **Can be Blank** - Allows the position to be empty.
- **Roles** - Automatically assigns the listed assigned roles when the person holds the position. E.g., If there is a position name Website Administrator, the assigned role given would be Website Editor. This way the person would be able to manage the website.

3. Click **Save**.

Edit a Position

1. Click the **drop-down arrow** on the right, on the same row as the position.
2. Click **Edit.**
3. In the pop up, you will have these options:
    - **Name** - Title of the position.
    - **Code** - Code of the position.
    - **Maximum Number**- The maximum number of people who can be in this position for the term.
    - **Can be Blank** - Allows the position to be empty.
    - **Roles** - Automatically assigns the listed assigned roles when the person holds the position. E.g., If there is a position name Website Administrator, the assigned role given would be Website Editor. This way the person would be able to manage the website.
4. Click **Save.**

Delete a Position

1. Click the **drop-down arrow** on the right, in the same row as the position.
2. Click **Delete.**
3. In the browser prompt, click **OK** to confirm the deletion.

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