Adding Volunteer Positions

Once a volunteer has worked or expressed interested in a position you should add the position to their data. To start, add the volunteer to the Patron Database.
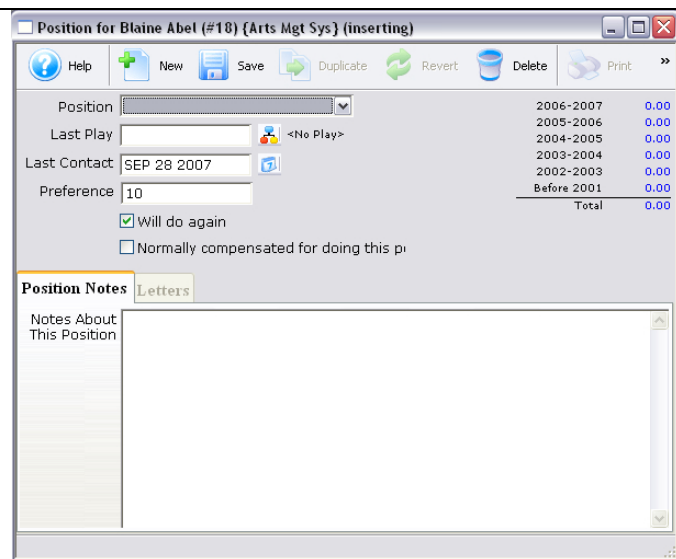
1. In the patron record, click the Volunteer [Volunteer] icon. The Volunteer History window opens.
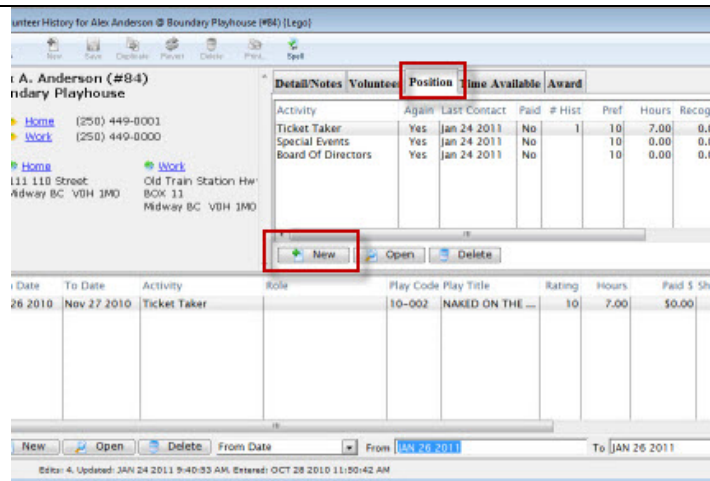
2. Click the Position **Position** Tab.

3. Then click the New [New] button. The Positions For Window opens.

4. Select the position from the list.
   The pulldown list is customizable in the Code Tables >> Volunteer Activities.

5. Select a play using the Lookup [icon] button if applicable.
   This will open the Play List Window allowing you to search for a play. Double click the play to select it.

6. Change the last contact date if needed.

7. Select "Will do again" or "Normally compensated for doing this position" if applicable.

8. Enter any notes about the position.

9. Click Save [Save] if all the information is correct.

10. The new position will now be shown under the Positions Tab and be accessible to create the selected volunteer's records.
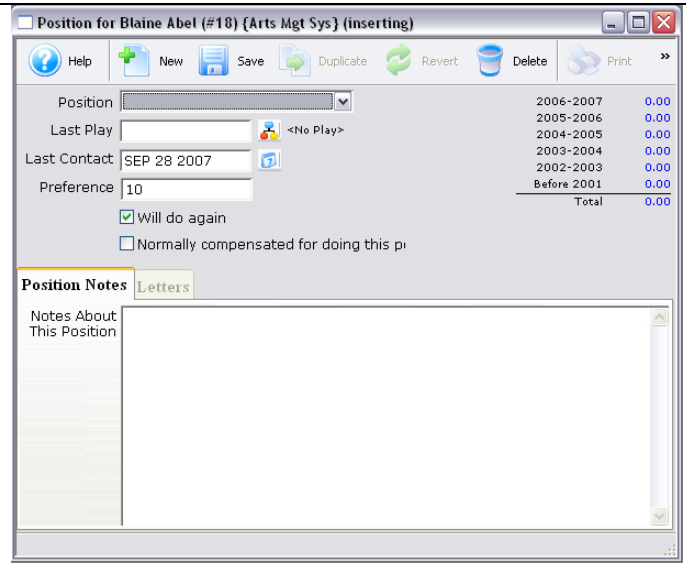
Editing Volunteer Positions

You may need to edit a volunteer position to update notes about the position or the last play the volunteer worked. This is performed through the Positions Tab on the Volunteer Window.

	1. Click the Position **Position** Tab.
2. Click on the position you wish to edit.
3. Click the Open button 🔎 Open . This will open the Position Window for the position.
	4. Change any data as needed.

5. Click the Save 💾 Save button.

You will return to the Volunteer Window and any changed data will be saved and displayed under the Position Tab. |

Deleting Volunteer Positions

You may now delete positions which have no activities attached to them. Find the Patron Record and open the Volunteer Window.

	1. Select the Positions tab at the upper right of the window.
2. This tab displays all the positions the volunteer has held or expressed an interest in.
3. Click on the position you wish to delete.
4. Click the Delete 🗑 Delete button at the bottom of the tab. The following confirmation window will open:
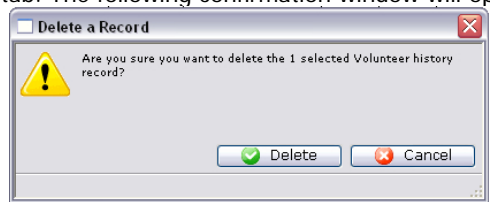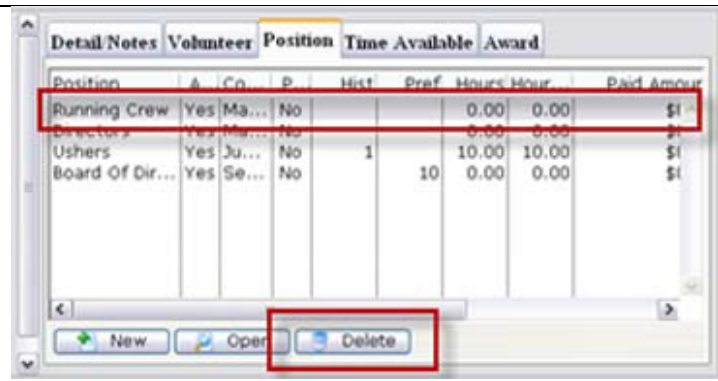
5. Click Delete ✅ Delete to proceed with the delete.
6. To cancel the position deletion click Cancel ❌ Cancel . |