

Adding multiple organizations and positions to a person's profile

12 Steps

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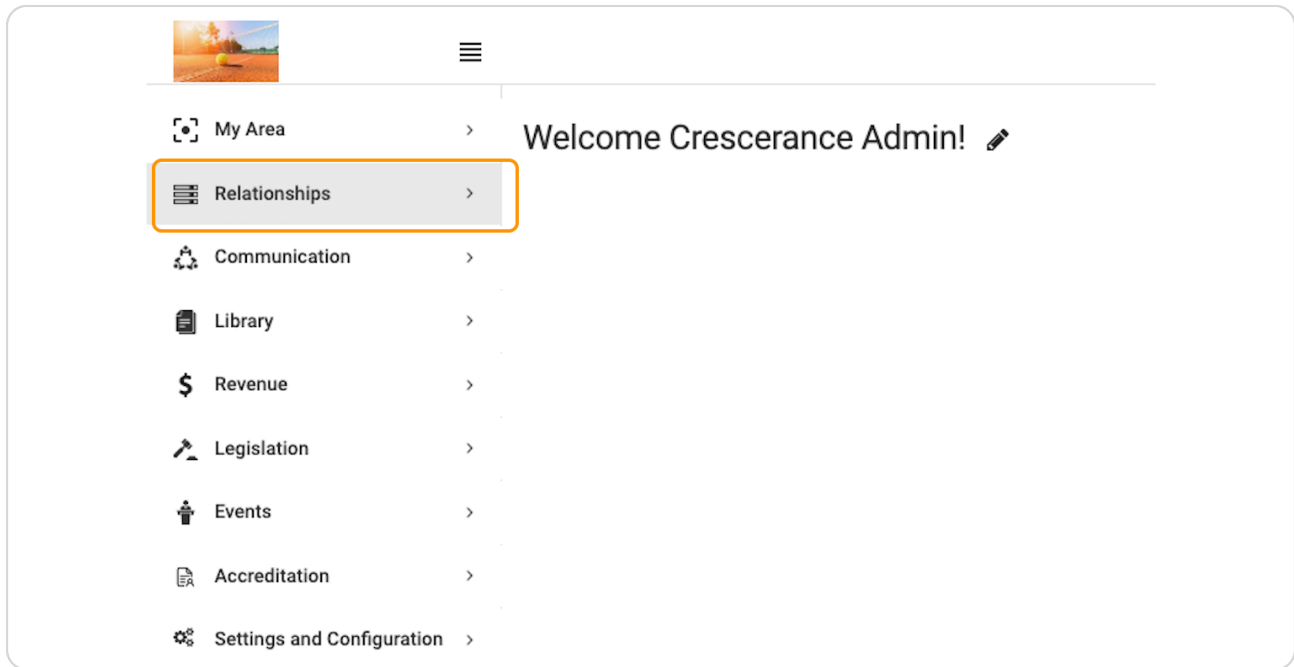
Created by
Engagifii Inc.

Creation Date
January 3, 2024

Last Updated
January 3, 2024

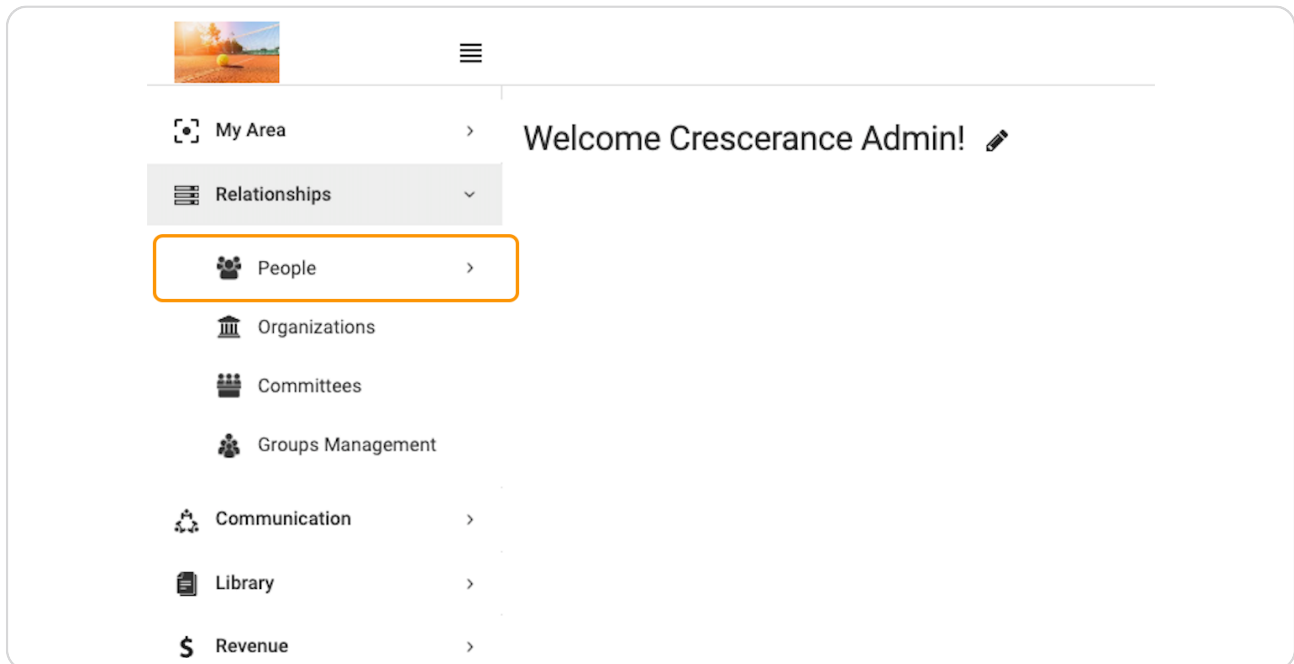
STEP 1

Click on Relationships



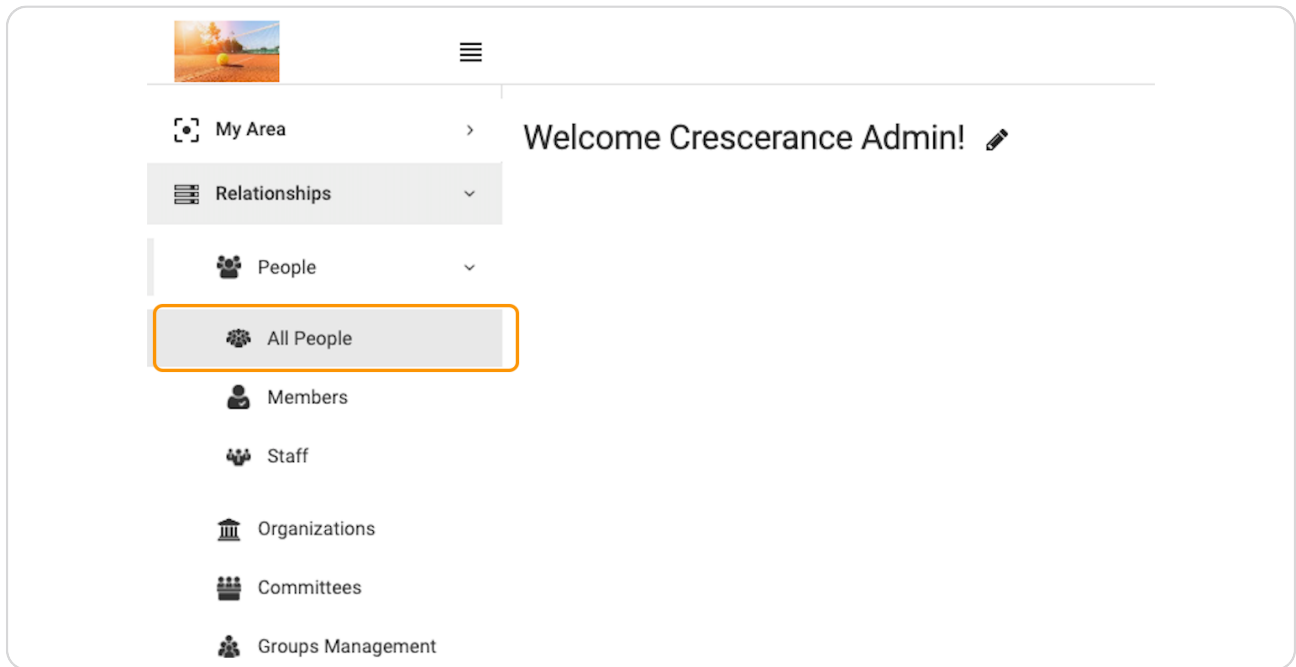
STEP 2

Click on People



STEP 3

Click on All People



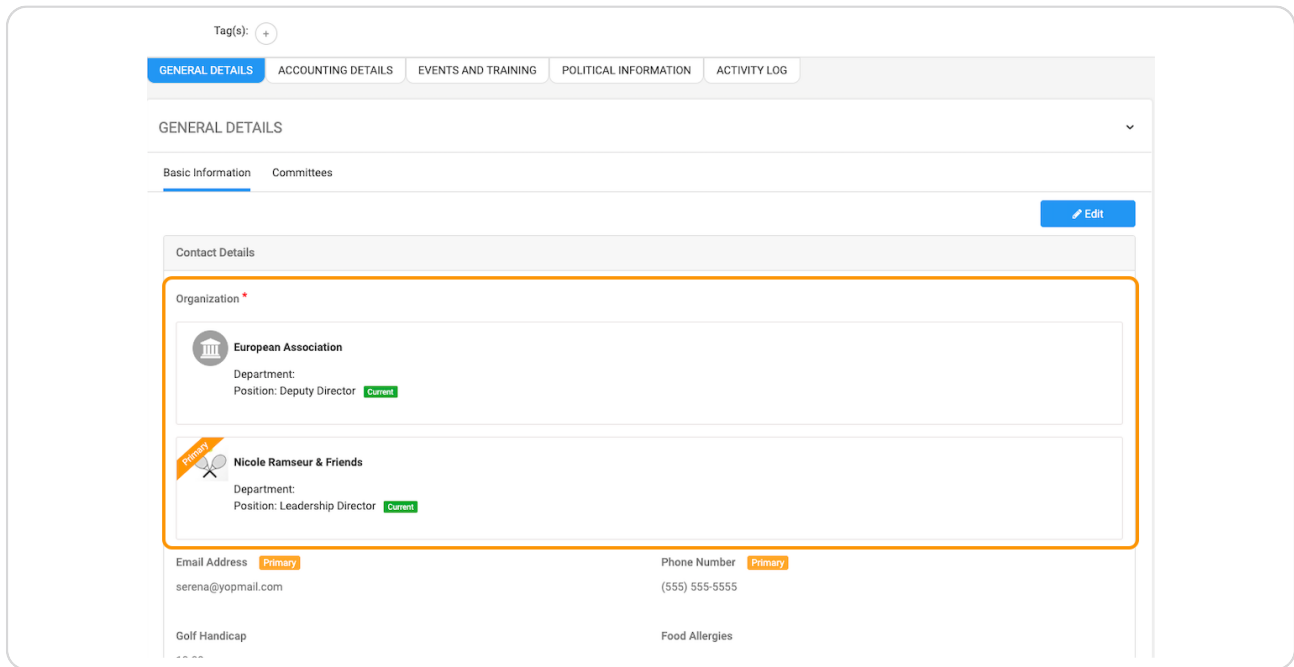
STEP 4

Click on the person you wish to edit

<input type="checkbox"/>			Federer, Roger	Legislative
<input type="checkbox"/>			Johnson, De'na	Administrator
<input type="checkbox"/>			Nadal, Rafa	Legislative
<input type="checkbox"/>			Williams, Serena	2 Positions
<input type="checkbox"/>			Williams, Venus	2 Positions
<input type="checkbox"/>			Admin, Crescerance	Administrator
<input type="checkbox"/>			McEnroe, John	2 Positions

STEP 5

Scroll to the Organization



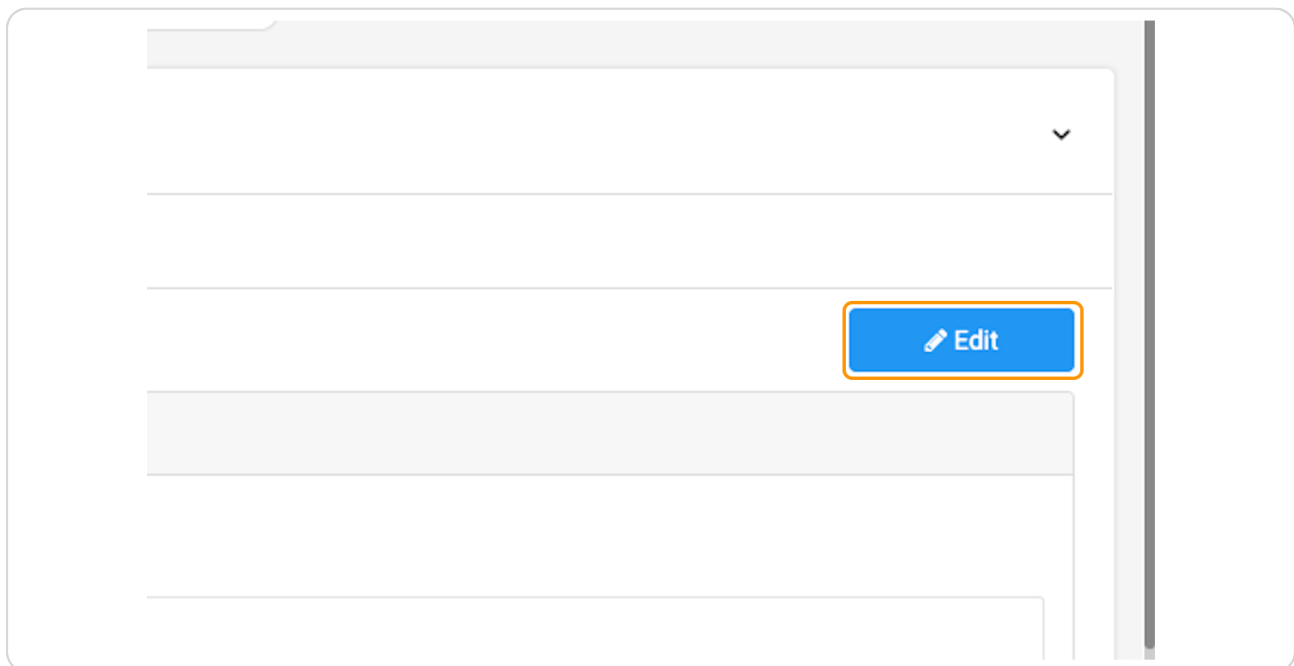
The screenshot shows a user profile page with a navigation bar at the top containing tabs: GENERAL DETAILS, ACCOUNTING DETAILS, EVENTS AND TRAINING, POLITICAL INFORMATION, and ACTIVITY LOG. The 'GENERAL DETAILS' tab is active. Below the navigation bar, there are sub-sections: 'Basic Information' and 'Committees'. The 'Basic Information' section is expanded, showing 'Contact Details'. Within 'Contact Details', there is a section for 'Organization' with two entries:

- European Association**
Department:
Position: Deputy Director Current
- Nicole Ramseur & Friends**
Department:
Position: Leadership Director Current

Below the organization section, there are fields for 'Email Address' (Primary) with the value 'serena@yopmail.com' and 'Phone Number' (Primary) with the value '(555) 555-5555'. Other fields like 'Golf Handicap' and 'Food Allergies' are partially visible.

STEP 6

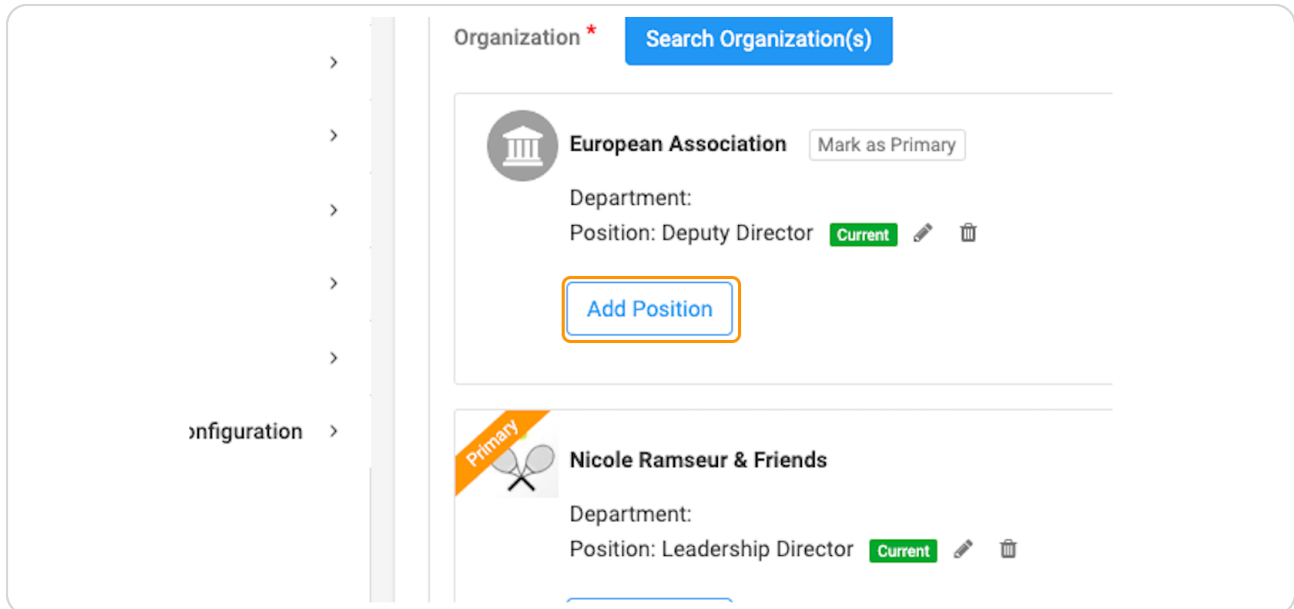
Click on Edit



This image is a close-up of the 'Edit' button from the previous screenshot. The button is blue with a white pencil icon and the text 'Edit'. It is highlighted with an orange border.

STEP 7

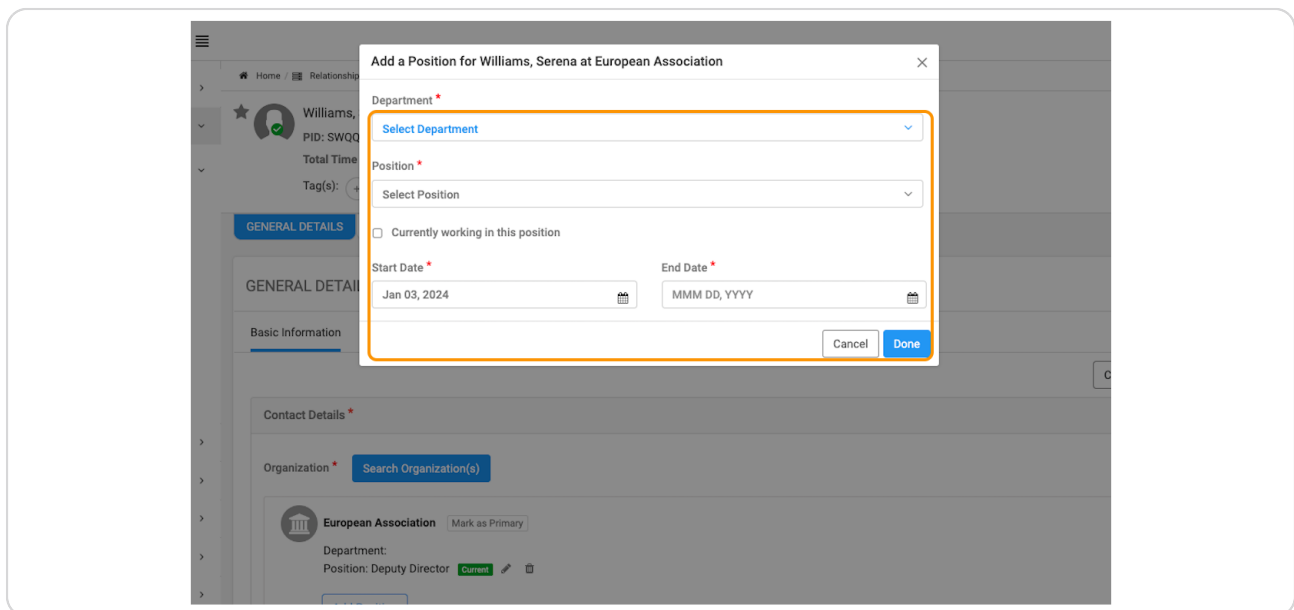
Click on Add Position to add another position or department to an existing organization.



STEP 8

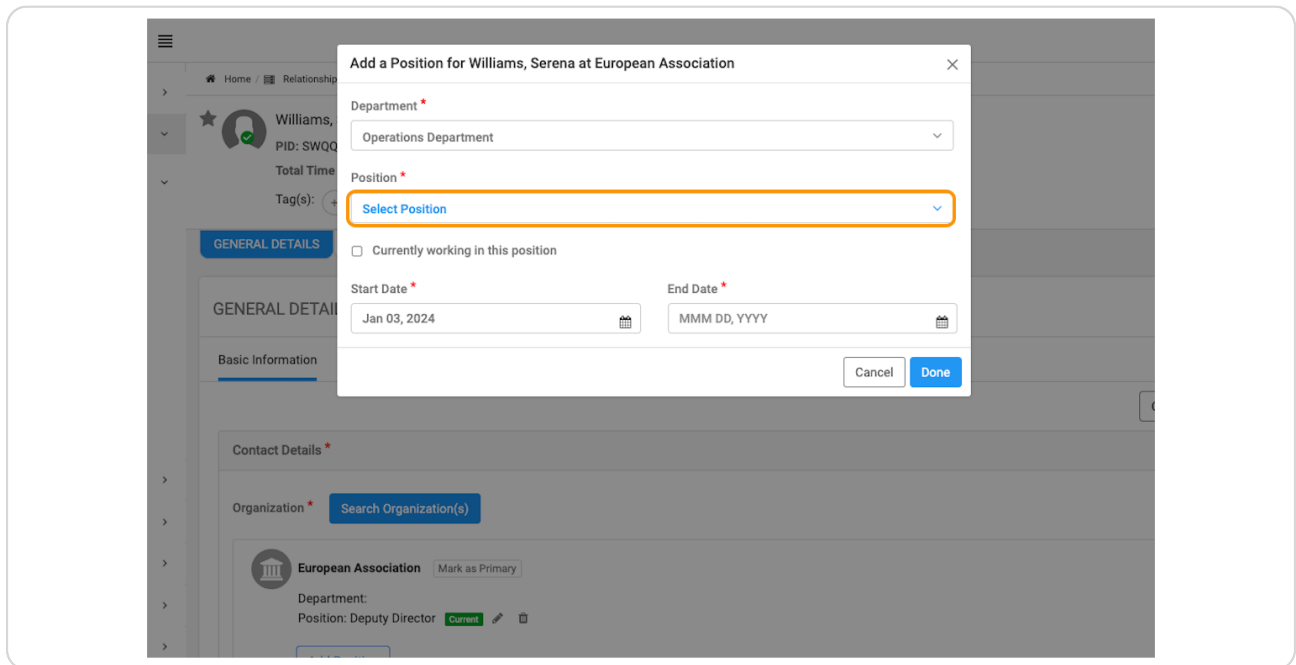
Select Department and Position from the dropdown list

Select Currently working in the position (if applicable) and enter dates. Click on Done when finished.



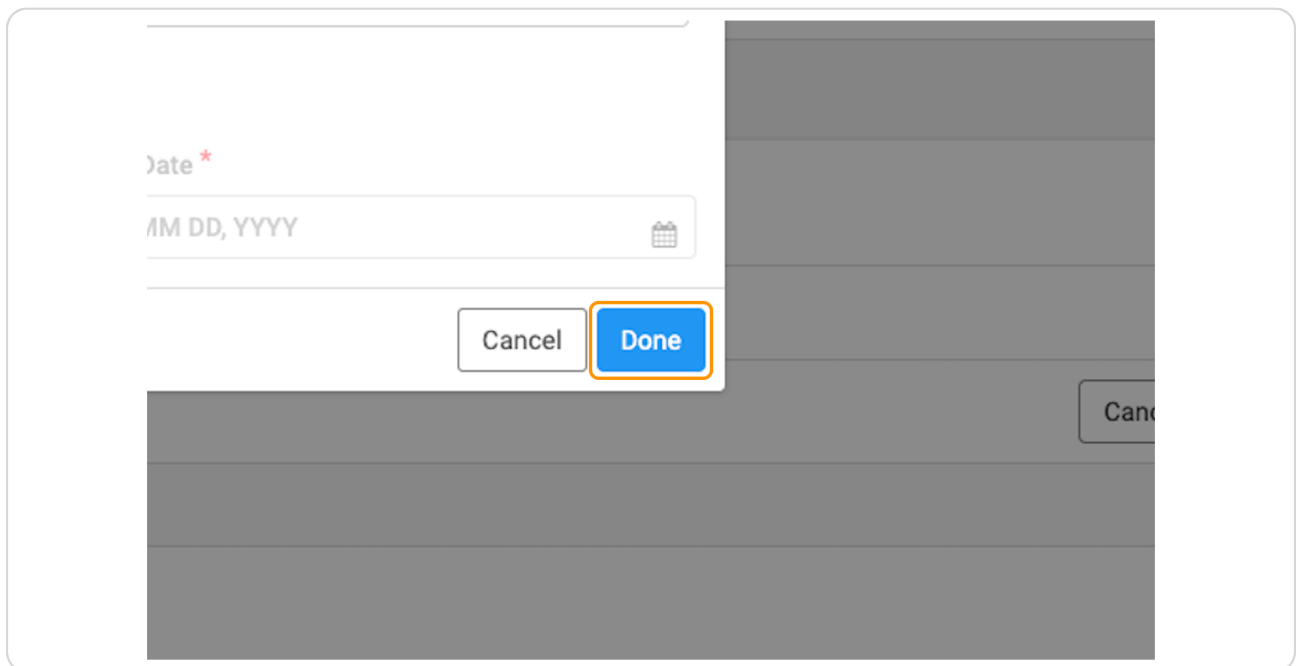
STEP 9

Click on Position and select one from the drop down menu



STEP 10

Click on Done



STEP 11

You can view the new department / position

The screenshot shows a user profile page with the following elements:

- Top navigation: "Tag(s): +", "Basic Information", "Committees".
- Buttons: "Cancel", "Save" (with a dropdown arrow).
- Section: "Contact Details *"
- Field: "Organization *" with a "Search Organization(s)" button.
- Organization Card 1: "European Association" (Mark as Primary).
 - Department: Travel Department
 - Position: Deputy Director (Current)
 - Department: Operations Department
 - Position: District Coordinator (Current)
 - Jan 03, 2024 - present
 - Button: "Add Position"
- Organization Card 2: "Nicole Ramseur & Friends" (Primary).
 - Department: Travel Department
 - Position: Leadership Director (Current)
 - Button: "Add Position"
- Fields: "Email Address * Primary", "Phone Number * Primary".

STEP 12

Click on Save to save final changes

The screenshot shows a form titled "Serena's Preferences". At the bottom of the form, there are two buttons: "Cancel" and "Save". The "Save" button is highlighted with an orange border and contains a document icon and a dropdown arrow. Below the buttons is a large grey rectangular area, and a trash icon is visible in the bottom right corner.

