

Onboarding a Volunteer

Member Details

Edit View Logs Attach Discount Login as this User Send Email

Contact Info
Id Card
Email Preferences
Account

Adams
ty@gmail.com
Volunteer
Discover Senior

Renew/Enroll/Extend

Jun-27-2027
EXPIRES ON

6 years 3 months
TOTAL
MEMBERSHIP

20
RENEWALS

on 2/17/17
LAST SEEN

(517)410-4710 Nicole Broughton (Partner)

(517)202-6553 Mobile

(517)879-4281 Work

202 S. 5th Street Goshen, IN 46528 131.22 mins

Volunteer Status

Access Cards

#	L
1234891234	N
3412759	1

Link New Card

Add-On Membe

No Add-On Member

Notes

Will renew shortly. -

Step 1 — Edit member's account settings

The screenshot shows the 'Member Details' page for a user named Adams. A red arrow points to the 'Edit' button in the top navigation bar. A blue arrow points to the 'Account' link in the left sidebar menu. The main content area displays membership information: 'Expires on Jun-27-2027', '6 years 3 months TOTAL MEMBERSHIP', '20 RENEWALS', and 'on 2/17/17 LAST SEEN'. It also lists contact information: '(517)410-4710', '(517)202-6553', '(517)879-4281', and '202 S. 5th Street Goshen, IN 46528'. The 'Volunteer Status' section is at the bottom.



If the new volunteer doesn't already have an account, you'll need to create one for them first.



Click "Edit"



Click "Account"

Step 2 — Change Tracking and Role

The screenshot shows the 'Volunteer Status' form. A red box highlights the 'Enable volunteer time tracking?' field, which is set to 'Yes'. A blue box highlights the 'Volunteer Role' field, which is set to 'Regular User (Demote)'. An orange arrow points to the 'Save Account Info' button at the bottom left.



Change "Enable Volunteer Time Tracking" to "Yes"

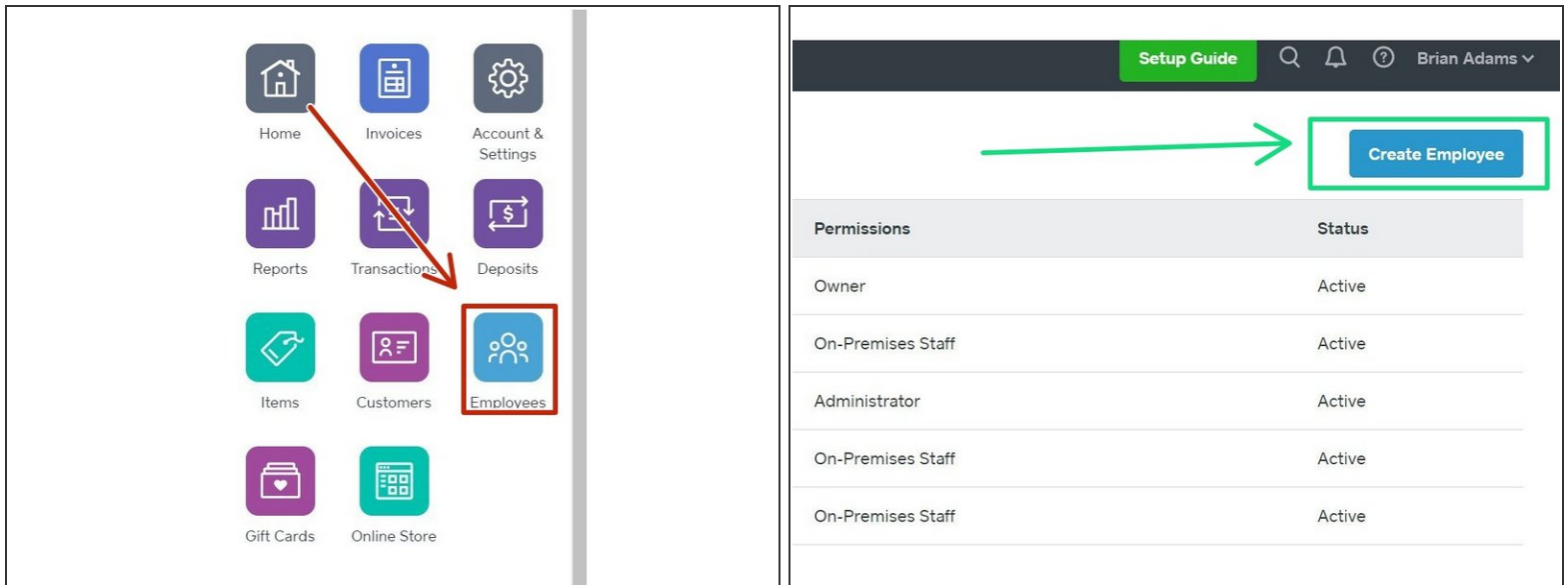


If the volunteer is checked out to staff the front desk, change "Volunteer Role" to "Point of Sale / CSR" (Customer Service Rep)



Click "Save Account Info"

Step 3 — Add Volunteer to Square



The first screenshot shows the Square dashboard with various icons. The 'Employees' icon, located in the third row, third column, is highlighted with a red box. A red arrow points from the 'Home' icon to the 'Employees' icon. The second screenshot shows the 'Create Employee' button in the top right corner, highlighted with a green box. A green arrow points from the left towards the button.



This part of the SOP should only be completed if the volunteer is checked out to staff the front desk!

- Login to Squareup.com using LMN's credentials.
- Click "Employees" in Square.
- Click "Create Employee"

Step 4 — Create Square User

Contact Information

First Name	First Name	Last Name	Last Name
Phone (optional)	Phone		
Email (optional)	Email		

Permissions

☒ Enable permissions, sales tracking, and timecards

Role Type

☒ Standard (\$0/mo)
☐ Mobile Staff (Free)

Role

On-Premises Staff [Edit Role](#)

Access

Point of Sale (via Passcode)

Point of Sale Passcode

0000

[Generate](#)

- Enter the volunteers contact info
- Check "Enable Permissions"
- Choose "On Premises Staff" for "Role"
- Assign a 4-digit passcode to identify the volunteer.
 -  This is how Square will identify them when using the iPad to complete a transaction.
-  Be sure to alert the volunteer to the "golden rule" of using Square: Never process your own transactions. This internal check helps ensure the integrity of our books.
- Click "Save" (at the top of the page)