

How to add a new volunteer

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Volunteers are usually based on a Contact record with additional volunteer-specific information.

Steps

1. Go to the **Volunteers** section, or start from an existing Contact record.
2. If the person does not yet exist, create their contact record first (see "How to add a new contact").
3. Mark the person as a volunteer or open the volunteer profile section.
4. Complete volunteer-specific fields. Common examples include:
 - Skills and interests
 - General availability
 - Emergency contact information
 - Screening / background check status
 - Start date or orientation date
 - Preferred roles or locations
5. Save the record.

Once someone is set up as a volunteer, you can track their hours, assign them to events, manage their schedule, and include them in volunteer reports.

Tip: Keep screening status and emergency contact information up to date for safety and compliance.
