Chapter 7: Customer Service – Manage Teams

- Search for a Team
- View Team Member Roster
- View Team’s Gift History
- Edit a Team’s Registration Information

Search for a Team

1. From the EMC, click Customer Service in the top Navigation Bar.
2. Under Related Actions, select Manage Teams.
3. A list of all registered teams will be displayed. Find the appropriate team in the list provided or through the search function.

**TIP:** When searching, use % for wildcard. Example: Walk% if you are trying to find Walking or Walkers.
4. Click Manage to access the Team profile.

*If you have any questions, please open an event support case*
View Team Member Roster

1. From the EMC, click Customer Service.

2. Under Related Actions, select Manage Teams.

3. A list of all registered teams will be displayed. Find the appropriate team in the list provided or through the search function.

4. Click Manage to access the Team profile.

5. On the team’s account record, scroll to the bottom of the page and click the Members tab to pull a complete list of team members.

View a Team’s Gift History

1. From the EMC, click Customer Service.

2. Under Related Actions, select Manage Teams.

3. A list of all registered teams will be displayed. Find the appropriate team in the list provided or through the search function.

4. Click Manage to access the Team profile.

If you have any questions, please open an event support case
5. On the team’s account record, scroll to the bottom of the page. View the Gift History section.

Within the team’s gift list, you can change the honor roll name, gift soft credit, or refund the donation. See Chapter 9: Manage Gifts for detailed steps.

Edit a Team’s Registration Information

1. From the EMC, click Customer Service in the top Navigation Bar.

2. Under Related Actions, select Manage Teams.

3. A list of all registered teams will be displayed. Find the appropriate team in the list provided or through the search function.

4. Click Manage to access the Team profile.

5. From the team record, under Related Actions, click Edit Team Details.

If you have any questions, please open an event support case.
6. Make changes to the team’s online registration as needed:
   a. **Team Name**: Edit the team name.
   b. **Team Goal**: Update the team fundraising goal.
   c. **Team Company**: Associate the team with a company.
   d. Click **Finish** to complete the changes.

   *1. Team Name:*
   Identifies the team
   Test Team

   *2. Team Goal:*
   Defines the amount of money the team intends to raise (which the Team Captain can update later in the Participant Center)
   $1,000.00

   *3. Team Company:*
   Identifies the company associated with or sponsoring this team
   - Choose an existing value
   - Enter a new company

   **Finish** or **Cancel**

*If you have any questions, please open an event support case*