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.
**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 fill 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.
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.
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.