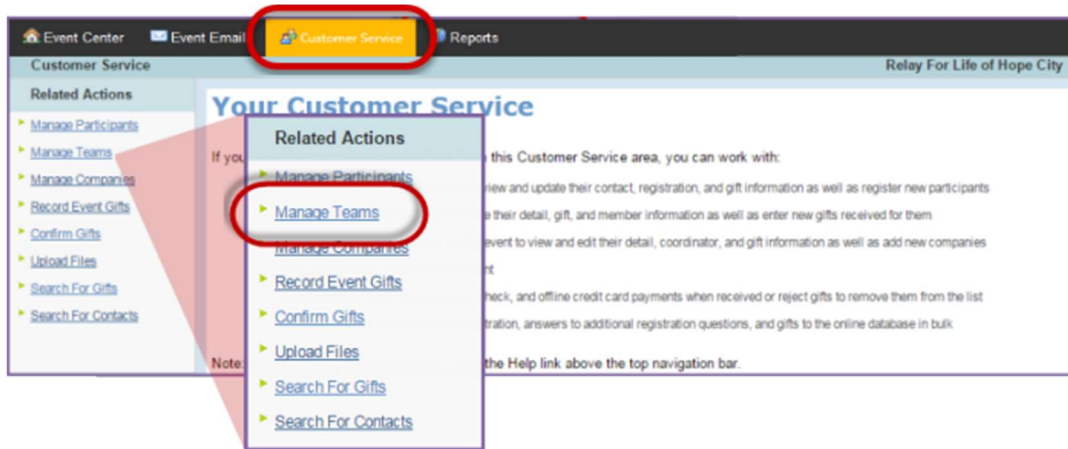


Chapter 7: Customer Service – Manage Teams

- [Search for a Team](#)
- [View Team Member Roster](#)
- [View Team’s Gift History](#)
- [Edit a Team’s Registration Information](#)

Search for a Team

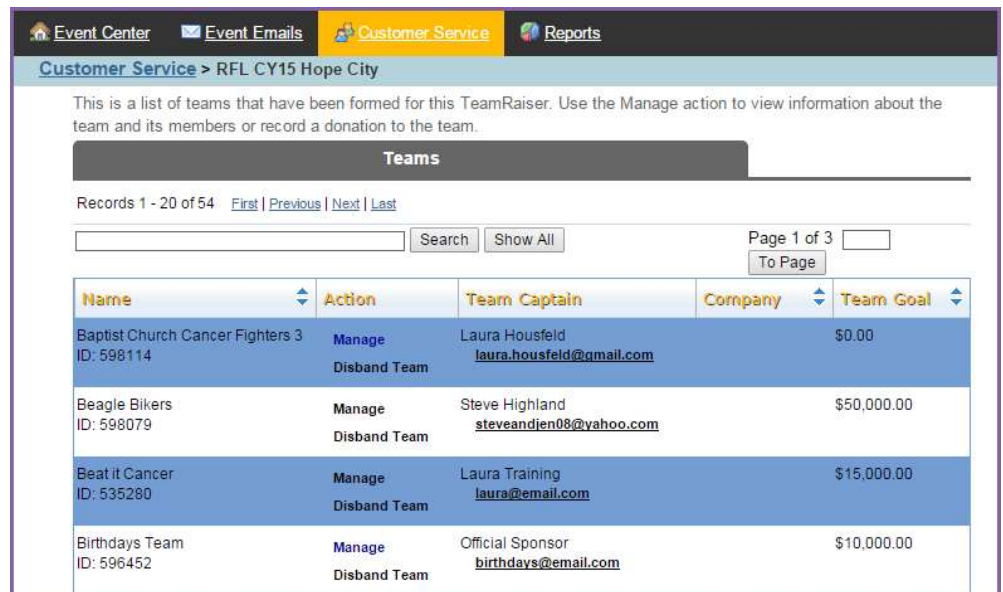
1. From the EMC, click **Customer Service** in the top Navigation Bar.
2. Under Related Actions, select **Manage Teams**.



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.

Name	Action	Team Captain	Company	Team Goal
Test Team ID: 1682129	Manage	Testy Testerson test@tes.com		\$1,000.00

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

The screenshot shows the team profile for 'Test Team (ID: 1682129)'. The 'Members' tab is highlighted with a yellow circle. Below the tab, a table lists the team members with their names, actions, and emails.

Name	Action	Email
Jane Doe_Test	Manage Participant	janedoe@gmail.com
Sally Jobs_Test (inactive)	Manage Participant	sgutierrez-test@convio.com
Sophia Latto	Manage Participant	sophia.latto@blackbaud.com
Princess Leia Solo	Manage Participant	princessleia@theforce.com
Testy Testerson(captain)	Manage Participant	test@tes.com

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.

Name	Action	Team Captain	Company	Team Goal
Test Team ID: 1682129	Manage <small>Disband Team</small>	Testy Testerson test@tes.com		\$1,000.00

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.](#)

Customer Service > RFL CY15 National Community BP > Test Team Relay For Life of Hope City

Related Actions

- ▶ [Edit Team Details](#)
- ▶ [Record Team Donation](#)

This is a summary that shows the information about the Gifts and Members of the selected team. Click Record Team Donation to enter a donation made on behalf of the team. In the Gifts list, use the View/Edit action to see information about the donor, edit the name to display on the Team Gift List, and change the amount of an unconfirmed cash or check gift. Use the Members tab to see the team roster and work with the TeamRaiser profiles of the members.

Test Team (ID: 1682129)

Captain: Testy Testerson 123 Hope Street Hope City, NY 12345 test@tes.com	Active Members: 4 Team Goal: \$1,000.00 Confirmed Gifts: \$360.00 (36.00%) Total Gifts: \$360.00 (36.00%)
--	--

Gifts | **Members**

Records 1 - 5 of 5 [First](#) | [Previous](#) | [Next](#) | [Last](#)

Page 1 of 1
To Page

Name	Action	Gift Type	Gift Date	Amount	On Behalf of
Darth Vader	View/Edit Change Soft Credit	Offline Confirmed (Cash)	11/13/2014	\$25.00	Princess Leia Solo
John Doe_Test	View/Edit Change Soft Credit	Offline Confirmed (Cash)	07/18/2014	\$10.00	Team
Michael Jordan	View/Edit Change Soft Credit	Offline Confirmed (Cash)	11/13/2014	\$200.00	Princess Leia Solo
Test1 Donation	View/Edit Change Soft Credit	Offline Confirmed (Cash)	11/07/2014	\$100.00	Princess Leia Solo
Test2 Donation	View/Edit Change Soft Credit	Offline Confirmed (Cash)	11/07/2014	\$25.00	Jane Doe_Test

Records 1 - 5 of 5 [First](#) | [Previous](#) | [Next](#) | [Last](#)

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.

Name	Action	Team Captain	Company	Team Goal
Test Team ID: 1682129	Manage <small>Disband Team</small>	Testy Testerson test@tes.com		\$1,000.00

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

Customer Service > RFL CY15 National Community BP > Test Team Relay For Life of Hope City


Related Actions


- [Edit Team Details](#)
- [Record Team Donation](#)


This is a summary that shows the information about the Gifts and Members of the selected team. Click Record Team Donation to enter a donation made on behalf of the team. In the Gifts list, use the View/Edit action to see information about the donor, edit the name to display on the Team Gift List, and change the amount of an unconfirmed cash or check gift. Use the Members tab to see the team roster and work with the TeamRaiser profiles of the members.

Test Team (ID: 1682129)	
Captain: Testy Testerson 123 Hope Street Hope City, NY 12345 test@tes.com	Active Members: 5 Team Goal: \$1,000.00 Confirmed Gifts: \$360.00 (36.00%) Total Gifts: \$360.00 (36.00%)

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

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

 **3. Team Company:**
Identifies the company associated with or sponsoring this team

Choose an existing value
 Enter a new company:

or [Cancel](#)