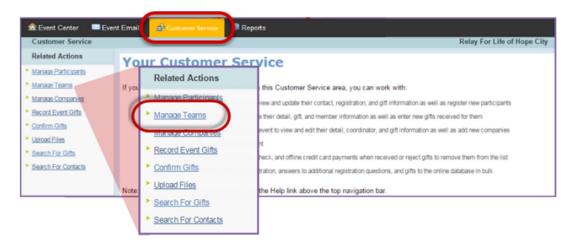
- Search for a Team
- <u>View Team Member Roster</u>
- View Team's Gift History
- Edit a Team's Registration Information

Search for a Team

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



 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 <u>Walking</u> or <u>Walkers</u>.

4. Click **Manage** to access the Team profile.

nt Event Center Reports Maile Event Emails Customer Service Customer Service > RFL CY15 Hope City This is a list of teams that have been formed for this TeamRaiser. Use the Manage action to view information about the team and its members or record a donation to the team Teams Records 1 - 20 of 54 First | Previous | Next | Last Search Show All Page 1 of 3 To Page Name Action Team Captain Company 🗘 Team Goal 🌲 Baptist Church Cancer Fighters 3 Laura Housfeld \$0.00 Manage laura.housfeld@gmail.com D: 598114 **Disband Team** \$50,000.00 Beagle Bikers Steve Highland Manage ID: 598079 steveandjen08@yahoo.com **Disband Team** \$15,000.00 Beat it Cancer Laura Training Manage ID: 535280 laura@email.com **Disband Team** Birthdays Team Official Sponsor \$10,000,00 Manage ID: 596452 birthdays@email.com **Disband** Team

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 Disband Toam	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.

Customer Service > RF	L CY15 National Communit	ty BP > Test Team		Relay For Life of Hope City
Related Actions	This page shows information, o	lonations, and members for t	the selected team. Use	
<u>Edit Team Details</u> <u>Record Team Donation</u>	Toot Toom (ID: 460)	24.20)		
	Test Team (ID: 1682 Captain:	2129)	Active Members: 5	
	Testy Testerson 123 Hope Street		Team Goal: \$1,000.00 Confirmed Gifts: \$360.00 (36.00%)	
	Hope City, NY 12345 test@tes.com		Total Gifts: \$360.00 (36.00%)	
	Gift Members			
	Records 1 - 5 01 5 First Previou			
		Search	how All Page 1 of 1 To Page	
	Name 🗘	Action	Email 🗘	
	Jane Doe_Test	Manage Participant	janedoe@gmail.com	
	Sally Jobs_Test (inactive)	Manage Participant	agutierrez+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	
	Records 1 - 5 of 5 First Previou	s Next Last		

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 Dieband T-am	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. <u>See</u> <u>Chapter 9: Manage Gifts for detailed</u> <u>steps</u>.

Customer Service > R	FL 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 donation made on behalf of the team. In the Gifts list, use the View/Edit action to see information about the don on the Team Gift List, and change the amount of an unconfirmed cash or check gift. Use the Members tab to so with the TeamRaiser profiles of the members.	nor, edit the name to display
	Test Team (ID: 1682129) Captain: Active Members: 4 Testy Testerson Team Goal: \$1,000.00 123 Hope Street Confirmed Gifts: \$360.00 (36.00%) Hope City, NY 12345 Total Gifts: \$360.00 (36.00%) test@tes.com Fear Context Fear Context \$360.00 (36.00%)	
	Gifts Members Records 1 - 5 of 5 First Previous Next Last Search Show All Page 1 of 1 To Page Name Action Gift Type Gift Date View/Edit Offline Confirmed (Cash) 11/13/2014 Change Soft Credit Offline Confirmed (Cash)	
	John Doe_Test View;Edit Offline Confirmed (Cash) 07/18/2014 \$10.00 Team Change Soft Credit Michael Jordan View:Edit Offline Confirmed (Cash) 11/13/2014 \$200.00 Princess Leia Sol Change Soft Credit	0
	Test1 Donation View:Edit Change Soft Credit Offline Confirmed (Cash) 11/07/2014 \$100.00 Princess Leia Sol Test2 Donation View:Edit Offline Confirmed (Cash) 11/07/2014 \$25.00 Jane Doe_Test Change Soft Credit Change Soft Credit Offline Confirmed (Cash) 11/07/2014 \$25.00 Jane Doe_Test	0
	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 Disband Team	Testy Testerson test@tes.com		\$1,000.00	

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

Customer Service > R	FL CY15 National Community BP > Test Te	am	Relay For Life of Hope C
Related Actions Edit Team Details Record Team Donation 	donation made on behalf of the team. In the Gift	bout the Gifts and Members of the selected team. Click s list, use the View/Edit action to see information about f an unconfirmed cash or check gift. Use the Members t	the donor, edit the name to displa
	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	* 1.	Team Name:
		Identifies the team
		Test Team
ŧ.	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
ŧ	3.	Team Company:
		Identifies the company associated with or sponsoring this team
		Choose an existing value
		Enter a new company