



Merging Teams

Two Teams can be merged together through the EMC.

- **Step One:** Move all the Team Members to the preferred team.
- **Step Two:** Change the soft credit on any online gifts made to the Team. Offline gifts will have to be re-entered on the new team, as they are deleted when the team is disbanded.
- **Step Three:** Disband the old team to release the Team Captain. This changes the status to an individual.
- **Step Four:** Move the old Team Captain (now an individual participant) to the new Team.

Step One: Moving all Team Members to the preferred team.

Login to the EMC and select the event you would like to manage.

- Click on the **Customer Service** tab.
- Click **Manage Teams**, under the Related Actions menu.
- **Scroll** or **Search** for the **Team Name** being merged/moved.
- Click **Manage**.
- Click the **Members Tab**.
- Click **Manage Participant**.

Welcome back Amanda Oldershaw [Click here to logoff](#) [Help](#)

Event Center Event Web Site Event Emails **Customer Service** Reports [+ Switch To Another Event](#)

Customer Service > Daff_Dash_BC_SIR_Columbia_Valley_2016 > Lion Head Bunnies Daffodil Dash - Columbia Valley 2016

Related Actions

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

This page shows information, donations, and members for the selected team. Use

Lion Head Bunnies (ID: 350896)

<p>Captain: Mrs. Cheryl Test 123 Any Street Vancouver, BC v4a 7y8 cmaranda@bc.cancer.ca</p> <p>Previous Event: None First Event: Daffodil Dash - Columbia Valley 2016 (21290)</p>	<p>Active Members: 2 Team Goal: \$2,000.00 Confirmed Gifts: \$5.00 (0.25%) Total Gifts: \$5.00 (0.25%)</p>
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[Gifts](#) **Members**

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Name	Action	Email
Janis McKell	Manage Participant	jmckell@bc.cancer.ca
Cheryl Test(captain)	Manage Participant	cmaranda@bc.cancer.ca

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Step One: Moving all Team Members to the preferred team...(cont'd)

- Click **Change Team**, under the Related Actions menu.
- **Scroll** or **Search** for the new Team Name.
- Click **Select**, under the Action Column.
- Click **Finish**.

Customer Service > Manage Participants > Manage Participant

Related Actions

- Record Donation
- Edit Contact Information
- Edit Registration
- Make Inactive
- Remove From All Teams
- Make Private
- Create New Team
- Change Team**
- Promote to Captain
- Promote to Co-Captain
- Reset Password
- Print Pages

Name: Janis McKel
 Email: jmkell@bc.cancer.ca
 Username: jmkell43535522
 Participation Type: Adult
 Registration Type: Offline
 Fundraising Goal: \$150.00
 Registration Status: Active
 Personal Page: Public
 Team Name: Norah's Granny Nanny's
 Team Rank: Member

Make sure Team Rank is Member. Team Captains can not be moved until the Team has been Disbanded.

Repeat above steps for all remaining Team Members. Only the Team Captain should be remaining on the Members Tab.

Step Two: Change the soft credit on any online gifts made to the Team. Gifts soft credited to Participants will move with the Participant when moved to a new Team.

- Click on the **Customer Service** tab.
- Click **Manage Teams**, under the Related Actions menu.
- **Scroll** or **Search** for the **Team Name** being merged/moved.
- Click **Manage**.
- Click the **Gifts Tab**.

Lion Head Bunnies (ID: 350896)

Captain: Mrs. Cheryl Test
 123 Any Street
 Vancouver, BC v4a 7y8
 cmaranda@bc.cancer.ca

Active Members: 2
 Team Goal: \$2,000.00
 Confirmed Gifts: \$5.00 (0.25%)
 Total Gifts: \$5.00 (0.25%)

Previous Event: None
 First Event: Daffodil Dash - Columbia Valley 2016 (21290)

Gifts | Members

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Name	Action	Gift Type	Gift Date	Amount	On Behalf of
Amanda Test Oldershaw	View/Edit Change Soft Credit	Online (Credit card)	05/13/2016	\$5.00	Team

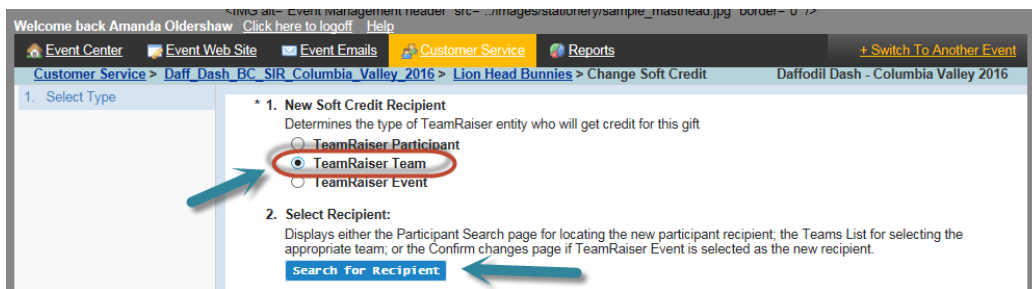
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Step Two: Change the soft credit on any online gifts made to the Team...(cont'd)

Offline gifts will be deleted when the team is disbanded and will need to be re-entered on the new Team so take note of the details if necessary. (Amount, recognition name, etc.)

- Click **Change Soft Credit**
- Select **TeamRaiser Team**
- Click **Search for Recipient**
- Select the **Team** the donation will be soft credited to.
- Click Finish



Once all the Soft Credits have been changed on all Online Team Gifts, move on to Step Three.

Step Three: Disbanding Team

All members must be moved off of the team before disbanding. Only the Team Captain should be remaining on the Members Tab.

- Click on the **Customer Service** tab.
- Click **Manage Teams**, under the Related Actions menu.
- **Scroll** or **Search** for the **Team Name** being merged/moved.
- Click **Disband Team**
- Click **Disband Team** again on the following screen.

Name	Action	Team Captain	Company	Team Goal
Lion Head Bunnies ID: 350896	Manage Disband Team	Cheryl Test cmaranda@bc.cancer.ca		\$2,000.00
Norah's Granny Nanny's ID: 348957	Manage Disband Team	Amanda Oldershaw aoldershaw@bc.cancer.ca		\$5,000.00

Step Four: Move the old Team Captain (now an individual participant) to the new Team.

- Click on the **Customer Service** tab.
- Click **Manage Participants**, under the Related Actions menu.
- **Scroll** or **Search** for the **Participant Name** (the former Team Captain).
- Click **Manage**.
- Click **Change Team**
- **Scroll** or **Search** for the **Team Name** participant will be moved to
- Click **Select**, under the Actions column.
- Click **Finish**

