

# Understanding Teams

We looked at [how teams are handled on the public site](#) in the public site manual. But let's dive a little deeper into how team's work in HandsOn Connect.

Teams are a way to group people who want to volunteer together. Teams have the following advantages:

## They provide a way to gather statistics around a 'group' of people

- Like all the employees, spouses, family and friends of a sponsor-organization that comes out to a day of service to volunteer together.

## They provide a way for a group leader to manage a 'team' of volunteers

- Example: **A Corporate Team** may want a single person in the organization to take responsibility for 'signing up' multiple people from the organization for a volunteer opportunity
- **Civic teams, fraternities, or sororities.** Usually one person is trying to arrange and manage the sign-up of their entire group.
- Teams are a great way to manage **Families.** since volunteers under the age of 13 cannot manage their own account, a parent or guardian can create a family team to manage signing up their minor children for family-friendly volunteer opportunities

Teams are 'private'. A team is created by a team captain who controls the membership, and adds team members who they take responsibility for signing up for opportunities.



Here's a Key Concept. There are two parts to working with teams:

- 1) A team captain **CREATES** a team. They make a list of the team members who will be part of a team. A team can be edited and its members changed over time.
- 2) A team captain then **SIGNS UP** the team for an opportunity, by indicating which members of their created team will Participate in that volunteer opportunity.

A team can be signed up for one or multiple volunteer opportunities. You do not have to create a different team for each opportunity sign-up. You can select which team members are participating in each volunteer opportunity you sign the team up for!

# The role and responsibilities of a team captain

## I am Captain of These Teams:

### Vals Volunteers

Number of Members: 12

Upcoming Volunteer Opportunities: 0

MANAGE TEAM

Total Hours Served by Team: 2.00

Other Captain(s): Heidi Klum, Leydi Rangel

OPPORTUNITY	ORGANIZATION	WHEN	SIGNED UP	LOCATION/STATUS
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**A team captain may register any or all members of their team for volunteer opportunities.**

- Team Captains are responsible for ensuring the people they sign up attend the opportunity. (While team members who have email addresses will be notified about opportunities their team captain signs them up for, its possible to have team members who do not have email addresses -- so the only way they know they are attending is through the team captain who signed them up communicating with them directly!
- **Best Practice:** we recommend that when a team has signed up for a large # of spaces in an opportunity - that the Opportunity Coordinator contact the Team Captain and make SURE they are guaranteeing that the folks they signed up are going to attend!
- A team captain can sign up team members without signing themselves up. If they do so, the ability to manage the team participants will not appear in "My Account / My Upcoming Opportunities" but can be managed by going to the "My Team" page. All team captains will be able to view and modify participation in projects from the My Teams Page. However, if a team captain does not sign themselves up - they still bear the responsibility of notifying and reminding their team members to attend.

## How is Team data Managed in Salesforce?

Teams are managed through two custom objects in Salesforce:


- 1) **Volunteer Teams** - the volunteer team record tracks data ABOUT the team itself.

Details

Related

Information

Owner


[9015 HOC Admin](#)

Volunteer Team Name

Valerie's Volunteers

Organization Text

Troutco

Organization

Status

Active

Total Members

4

Hours Served

0.00

Description Information

Description

My neighborhood Team

System Information

Created By


[9015 HOC Admin](#), 4/23/2018 12:53 PM

Last Modified By


[9015 HOC Admin](#), 7/17/2018 2:02 PM

If you create a team administratively in Salesforce, you'd create a new Team Record.

**Volunteer Team name** - the name of the team

**Organization Text:** If the team is created from the public site, this is the Company/Group Affiliation field in the team creation form.



**Organization:** If you want to actually connect the team to an existing organization in your database, use this lookup field to relate the organization to the team.

**Status:** A team can be Active or Inactive. If the team is no longer being used, change the status to inactive. It will no longer appear on the public site.

**Description:** the Description given in the team creation form "Team Description".

The other fields "Total Members" and "Hours Served" are automatically calculated and populated.

**2) Volunteer Team Members** - each member of the team has a separate "Team Member" record. The team member record associates a contact in the database with a team. The Team Member record's 'name' is a Team member ID in the form of VTM-XXXXXX. Each team member record has a unique Team Member ID.

Related	Details
<div> <div> Information </div> <div> <div>Team Member ID</div> <div>VTM-000141</div> </div> <div> <div>Volunteer Team</div> <div><a href="#">Valerie's Volunteers</a></div> </div> <div> <div>Contact</div> <div><a href="#">Valerie Volunteer</a></div> </div> <div> <div>Team Member Email</div> <div><a href="#">troutco+valerie9015@gmail.com</a></div> </div> </div> <div> <div>Status ⓘ</div> <div>Confirmed</div> </div> <div> <div>Hours Served</div> <div>0.00</div> </div> <div> <div>Captain</div> <div><input checked="" type="checkbox"/></div> </div>	
<div> <div>System Information</div> <div> <div>Created By</div> <div>  <a href="#">9015 HOC Admin</a>, 4/23/2018 12:53 PM </div> </div> <div> <div>Last Modified By</div> <div>  <a href="#">9015 HOC Admin</a>, 11/5/2018 9:45 AM </div> </div> </div>	

**Volunteer Team:** a lookup to an existing volunteer team. (you can't create a team member record until both the contact and the team exist in the database).

**Contact:** the contact associated with the Volunteer Team. The team member email is automatically filled in when you associate the Contact.

**Status:** There are two picklist options available (though you will see 4!)

- Confirmed - the volunteer is active and part of the team
- Former - the contact had been on the team, but either the captain removed them or they removed themselves from the team.

The picklist values "Pending" and "Declined" are holdovers from HOC 2.0 - and no longer used by HOC 3.0

**Hours Served:** is automatically populated as a rollup of the number of hours the team member has as confirmed attendance.

**Captain:** Check this box if the team member is a captain of the team and able to sign up and manage team members. Captains should always have an email address and an active account in HandsOn Connect.

**i** When administratively creating a connection for a team member - you must enter the Team Member ID in the connection record. This is done automatically when a team connection is made via the public site.