TEAMS

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Team Overview

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

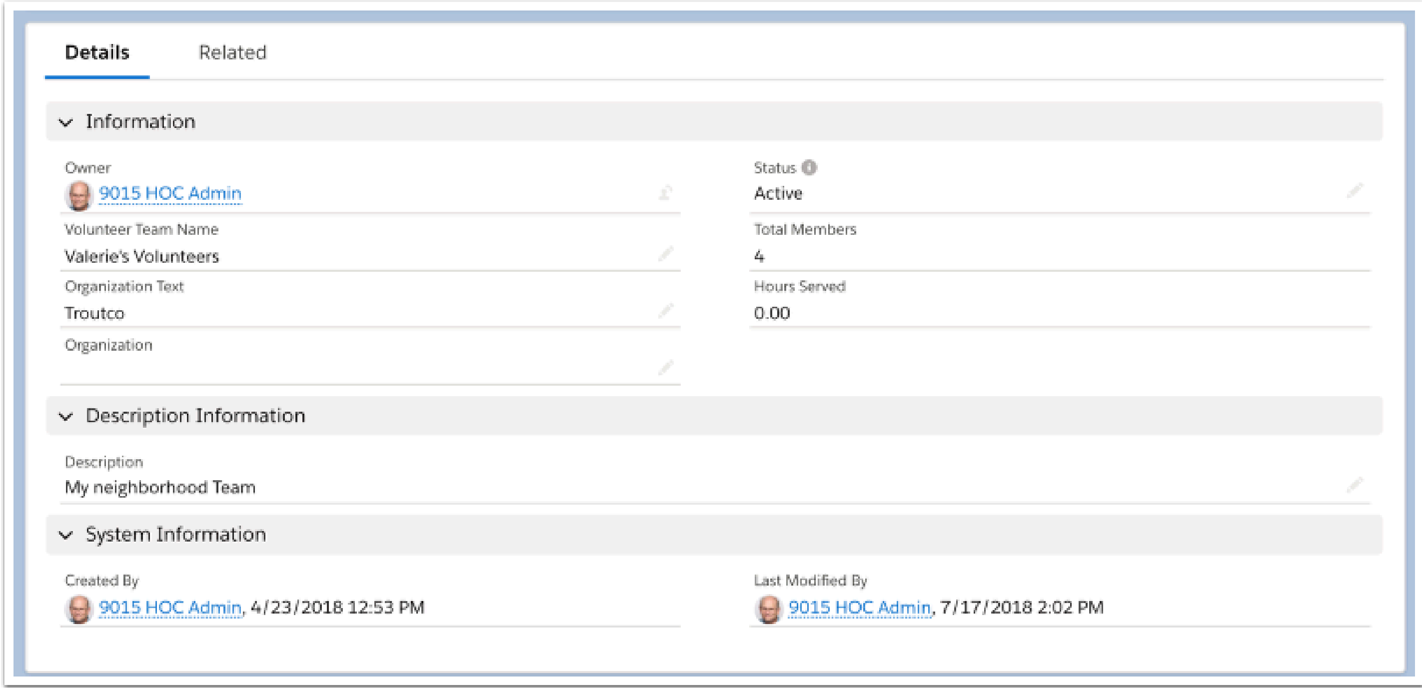
A team captain may register any or all members of their team for volunteer opportunities.

- 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.



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.

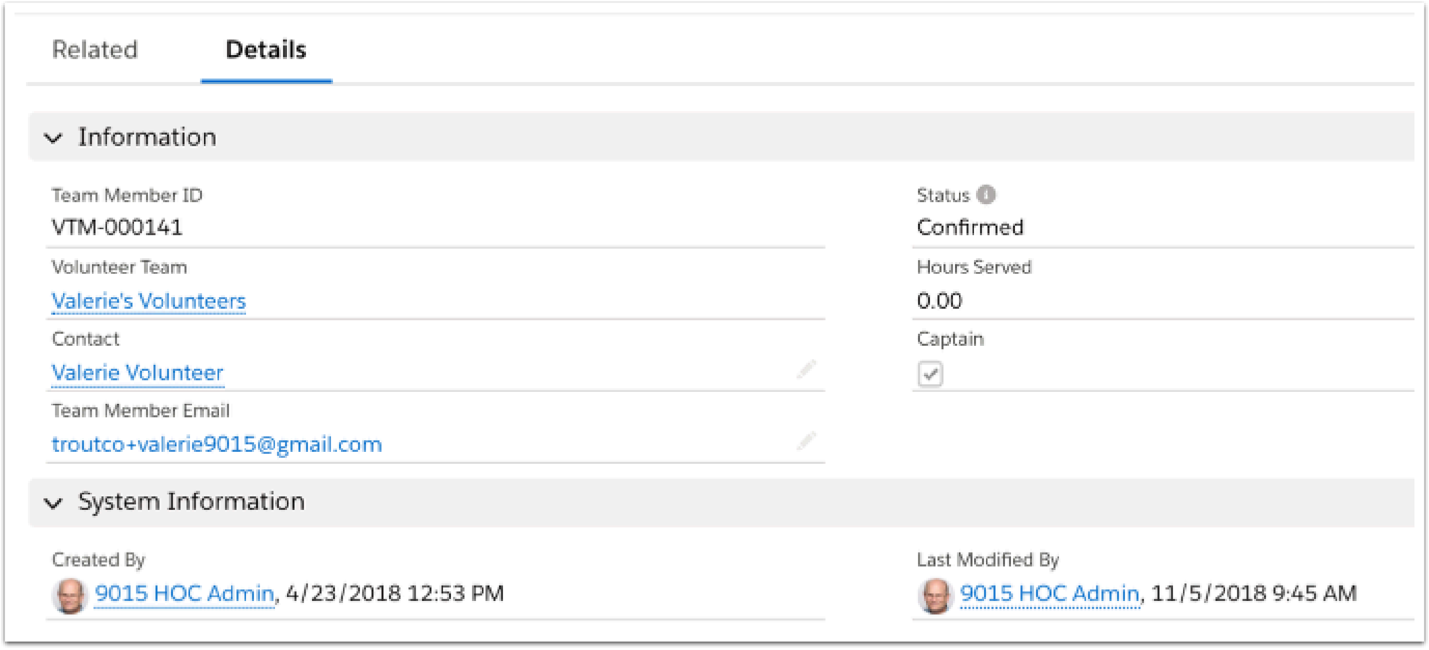
Organization: If you want to actually connect the team to an existing organization in your database, use this lookup field to relate the organization to the team.

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 populaed.

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.



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.

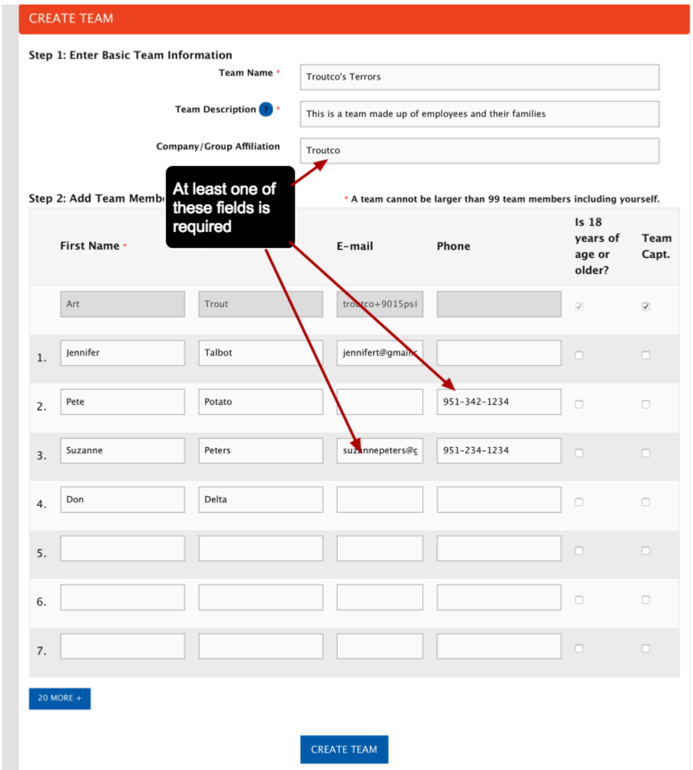
> When administratively creating a connection for a team member - you must enter the Team Member ID in the connection record. This is done automatically when a team connection is made via the public site.

Rules governing team creation on the public site

The "Create a Team" form on the public site is very flexible and forgiving. It was built to allow a variety of scenarios that might exist when creating a team.

Ideally people will fill in all the fields, but if they don't messages advise you on fields that must be filled in before creating a team.   There are a number of possible variations, and this post will tell you the 'rules' over what is minimally required.

The Team Creation Form



Default Rules governing creating a team on the public site:

1. Every Team member must have a first name and last name

2. No two team members can have the same email address   (since no two users can have the same user name in HandsOn Connect

3. You must fill out at least ONE of these fields on the form:

-- Company / Group Affiliation

-- An email address

-- A phone number

Ideally we'd like people to supply us with all three, but this flexibility provides a solution for creating a team when not everyone has unique email addresses.

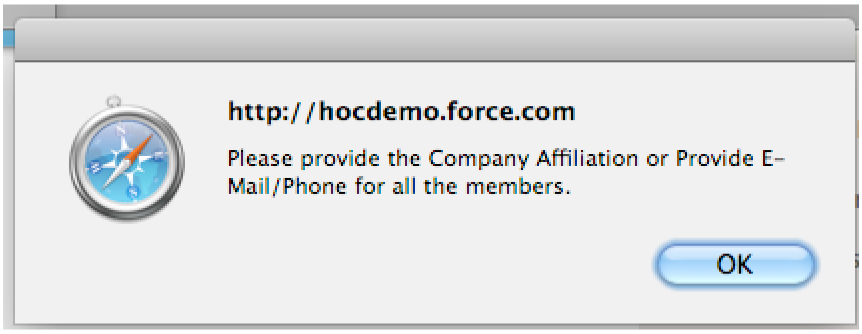
Other things to understand about creating teams:

1. The team captain does not have to enter themselves as a member of their team. By creating the team they are automatically made a team captain! There name will appear at the top of the team list so they shouldn't add themselves again :-). (In the image above - Art Trout is the team captain creating the team and this was auto-entered for him).

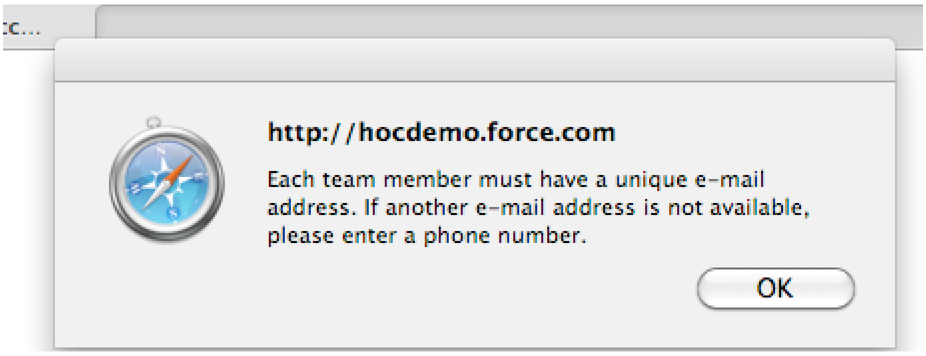
2. Additional team captains can be designated on the team, but ONLY if they have an email address. You cannot be a team captain without an email address!

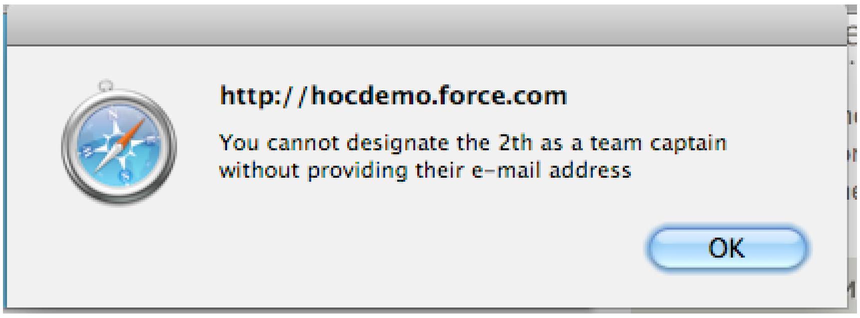
3. Team members who do not have email addresses submitted will not be notified that they've been made a team member. (They can't be!) All team members with email addresses will receive a notification that they've been added to the team, and encouraging them to register on the public site if they don't already have an account.

If the team captain omits required information they will be be prompted on how to correct the problem.



Here are some of the messages that appear





Options for Team Creation

The rules for creating teams as described above are the default settings for HOC team creation. If provides the most flexibility in creating teams. Again: Here's the default rules for creating teams:

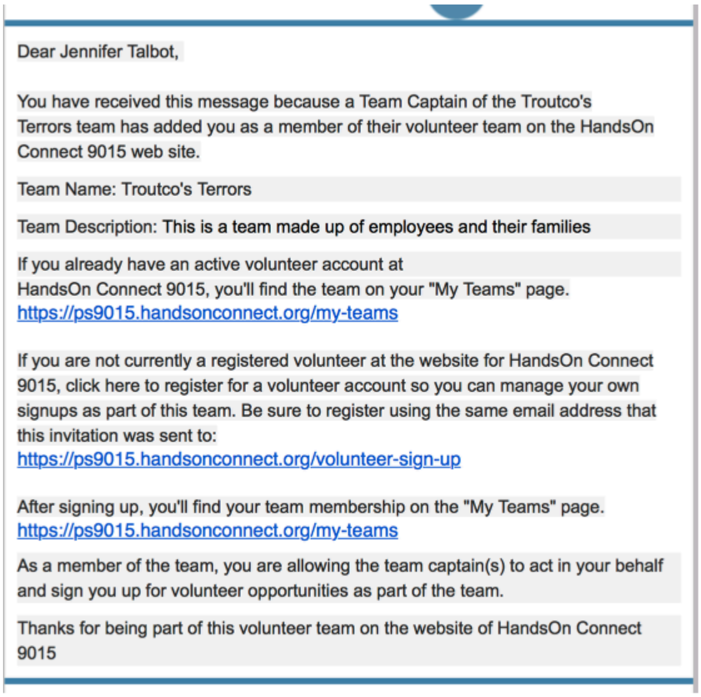
"When creating a team the fields Team name, Description, First name and Last name are required. Also required are EITHER a unique email address OR a phone number for each team member UNLESS a value is put in the field Company/Group Affiliation, in which case you do not have to supply an email OR a phone number for the team members.

However -- if your business process is such that you wish to change the default requirements for creating teams and team members HOC can be configured by the support team for custom team creation rules. (i.e. Email is always required, or don't display or require Team Description).   Open a support ticket if you wish to enable custom team creation rules.

What happens when a captain submits a team from the public site?

When a captain creates a team the following takes place:

An email is sent to every team member who has an email address



Dear Jennifer Talbot,

You have received this message because a Team Captain of the Troutco's Terrors team has added you as a member of their volunteer team on the HandsOn Connect 9015 web site.

Team Name: Troutco's Terrors

Team Description: This is a team made up of employees and their families

If you already have an active volunteer account at HandsOn Connect 9015, you'll find the team on your "My Teams" page.
https://ps9015.handsonconnect.org/my-teams

If you are not currently a registered volunteer at the website for HandsOn Connect 9015, click here to register for a volunteer account so you can manage your own signups as part of this team. Be sure to register using the same email address that this invitation was sent to:
https://ps9015.handsonconnect.org/volunteer-sign-up

After signing up, you'll find your team membership on the "My Teams" page.
https://ps9015.handsonconnect.org/my-teams

As a member of the team, you are allowing the team captain(s) to act in your behalf and sign you up for volunteer opportunities as part of the team.

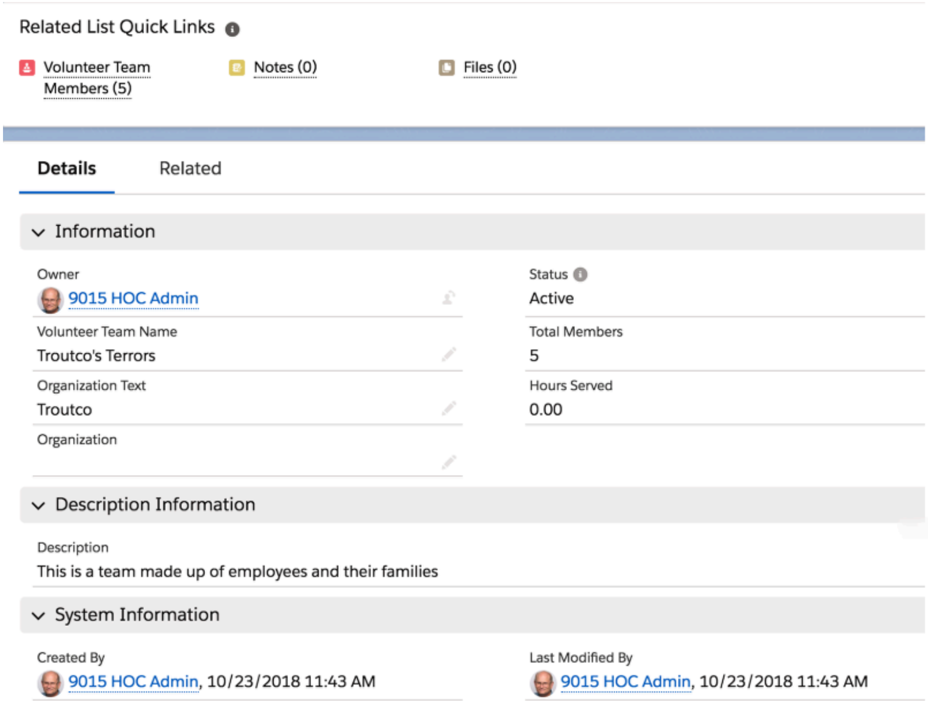
Thanks for being part of this volunteer team on the website of HandsOn Connect 9015

Anyone who does not have a log-in is invited to come to the site, and register for a volunteer account.

Those with no emails get nothing - and its up to the captain to take responsibility for them.

On the admin site, several records are created and/or updated:

A Volunteer Team Record is created

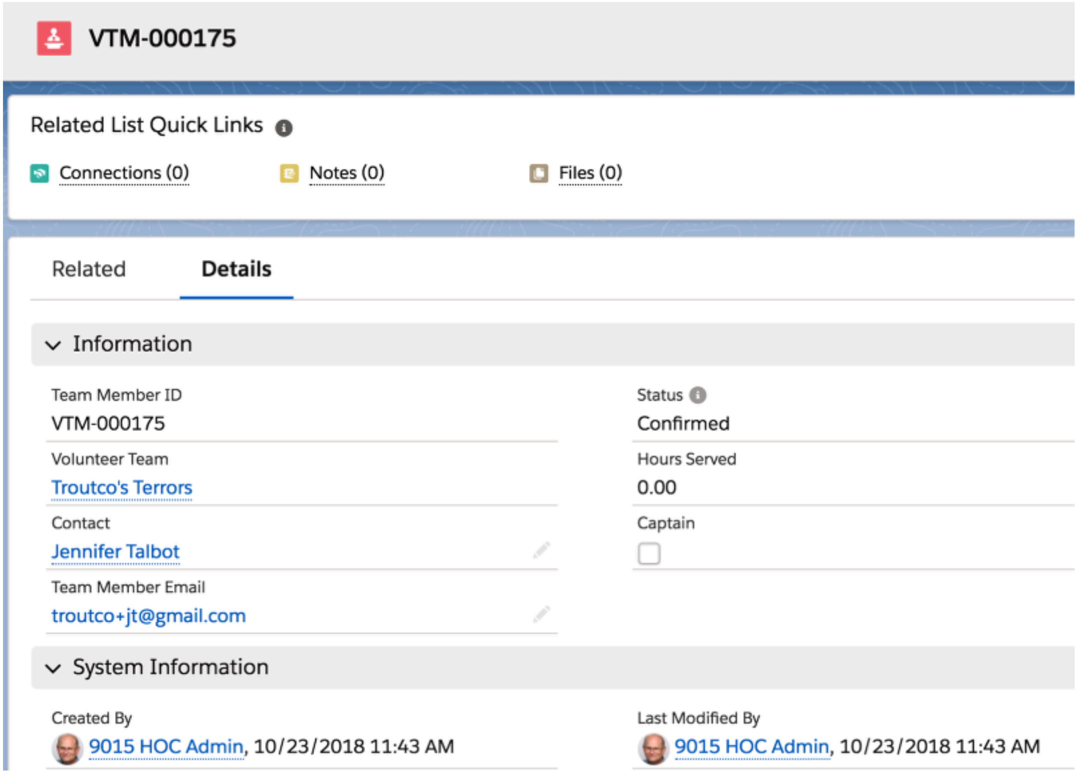


A record for the custom object "Volunteer Team" is created. It has the following fields:

- **Owner** This is the name of the API user in your system, that 'owns' all records created via the public site.
- **Volunteer Team Name**
- **Organization Text** - The organization name that was submitted when they created the team (if it was populated). This is a text field.
- **Organization --** This is a lookup field to an organization. Like the Employer field in the Contact Record -- it is just a placeholder for info. The organization field is a lookup - and can only be populated (if you desire) with the name of an actual organization in the system. (You can lookup the actual organization is if its in your database and associate this team with a real organization).
- **Status:** a picklist designated the status of the team. It is set to Active, but can be changed to Inactive, if you administratively wish to remove the team from their view on the public site.
- **Total Members:** An auto-summed formula field that counts the number of members on the team who are in Confirmed Status. (It does not count "Former" team members who have removed themselves from the team."
- **Hours Served -** an auto populated formula field to count the total hours served by the organization.

A volunteer Team Member record is created for each team

member



It has the following fields:

- **Team Volunteer ID -** a record number, sequentially created for each new Volunteer Team Member record, with the prefix VTM
- **Volunteer Team:** A lookup field to an existing team in the system
- **Contact:** a lookup to the contact record for that team member
- **Team Member Email:** the email that was submitted by the team captain (blank if they did not submit one)
- **Status:** a picklist with two valid values

  - Confirmed - The team member logged in or registered, and ACCEPTED the team invitation

  - Former -- The team member has removed themselves from the team or the team captain has removed them.

  - Pending and Declined - (these statuses are no longer used for team members, but still may be found in the picklist for compatibility with earlier versions of HOC).

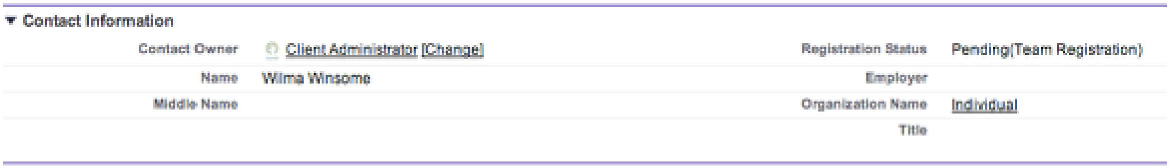
Note: Team Captains may sign up team members for volunteer opportunities, but not if the team member status is Former.

- **Hours Served**: An auto-calculated field, that totals the hours of service as a member of that team.
- **Captain -** a checkbox. It will be checked if they are designated as a captain.

Only captains can sign up team members for volunteer opportunities!

There is a related list to the connections for this team member.

The email address submitted is used to determine whether a new contact should be created or not!



If the email address for an invited team member does not already exist in the system, a new Contact Record will be created.   The contact will be created with the registration status **Pending (Team Registration).**

It will remain in this state until someone tries to register as a volunteer using that email address. (They will probably do so as a result of the email notification).

If the email of the invitee already exists in the system -- no change will be made to the contact or their status. But you'll be able to see in the related list that they are a pending (or confirmed) member of the team.

When someone registers on the site and a contact already exists that is Pending (Team Registration) status -- the status will be changed to confirmed, and volunteer login access will be granted. They will then have a profile of Volunteer.

Viewing or Editing Volunteer Teams and Participation

There are two things you typically do with an existing team:

1) Add or modify the people who are are your team. You do this by clicking on "Manage Team"

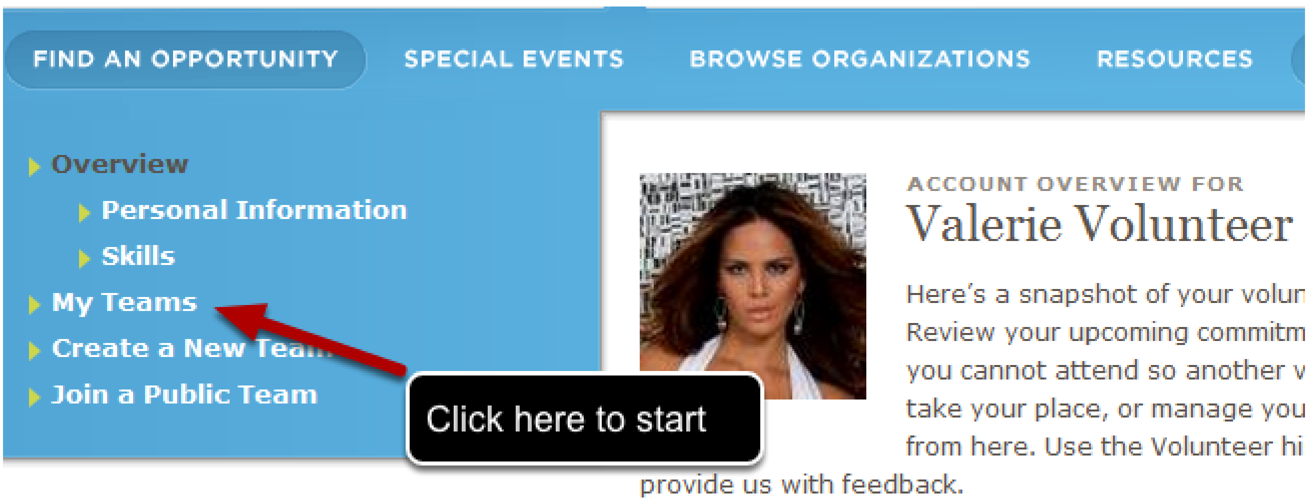
2) You want to change the sign-up of your team for a particular volunteer opportunity by removing some team members and possibly signing up others. You do this by clicking on the "Participants" Link for a particular volunteer opportunity.

If you want to add new team members AND sign them up -- you first have to add the team members through "Manage Team" - AND then be sure to click on "Participants" and add those new team members to the list of participating team members for one or more opportunities your team is signed up for.

Adding a new team member to the team roster is not the same thing as signing that team member up to participate in an opportunity.

A team is a group of people you manage. For each opportunity you can sign up one or many team members to participate for that opportunity!

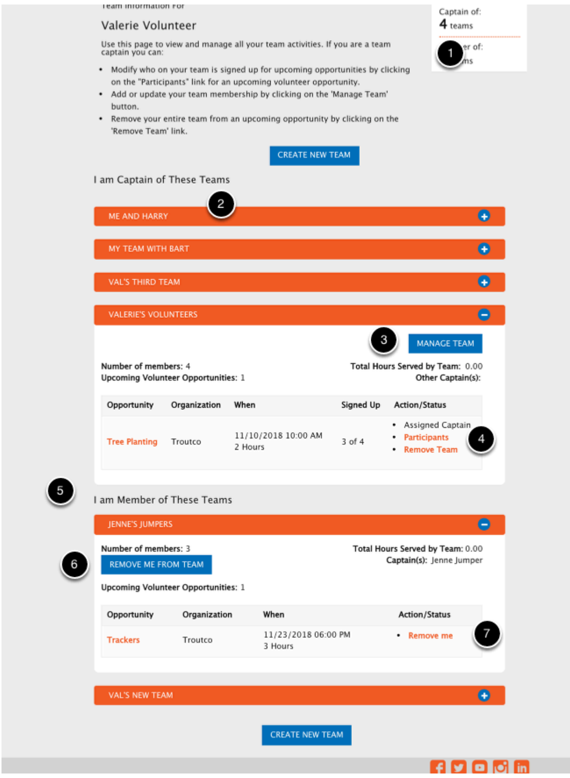
View My Teams



My Teams Page

On this page you can create new teams, edit existing teams, or manage your team member's participation in an opportunity you are already signed up for.

Click on the + sign to expand the info about each team.



1) Member of/ Captain of- Provides a summary of the your number of teams you are associated with.

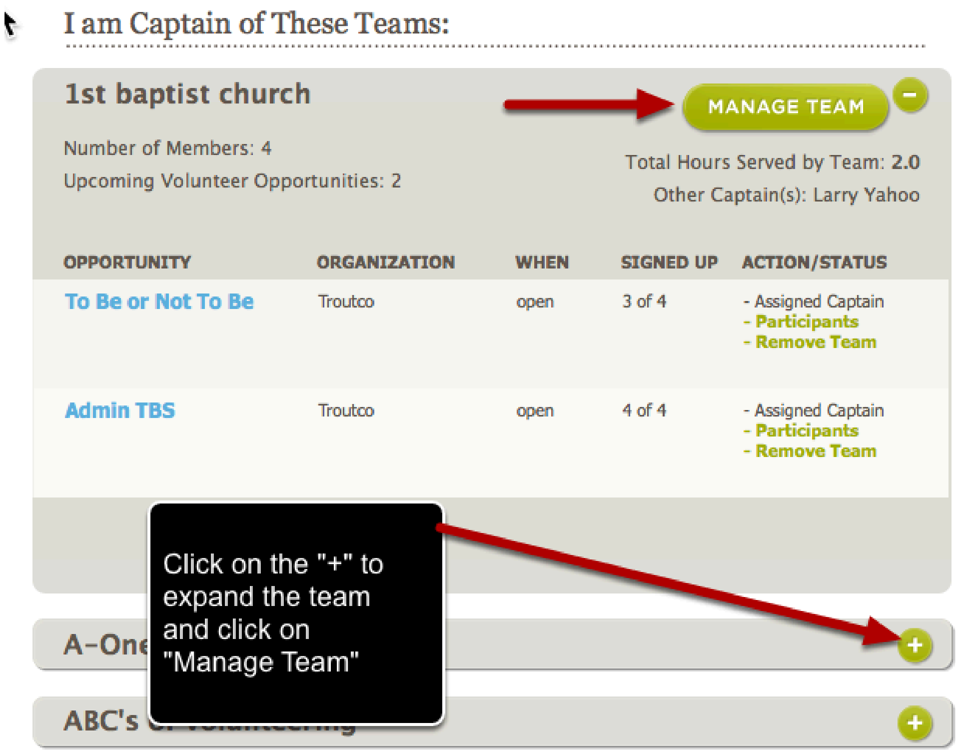
2) I am Captain of- Lists all the teams that you are a captain for and allowed to manage or sign-up for opportunities

3). Click on MANAGE TEAM to add (or remove), or edit who is on your team roster.

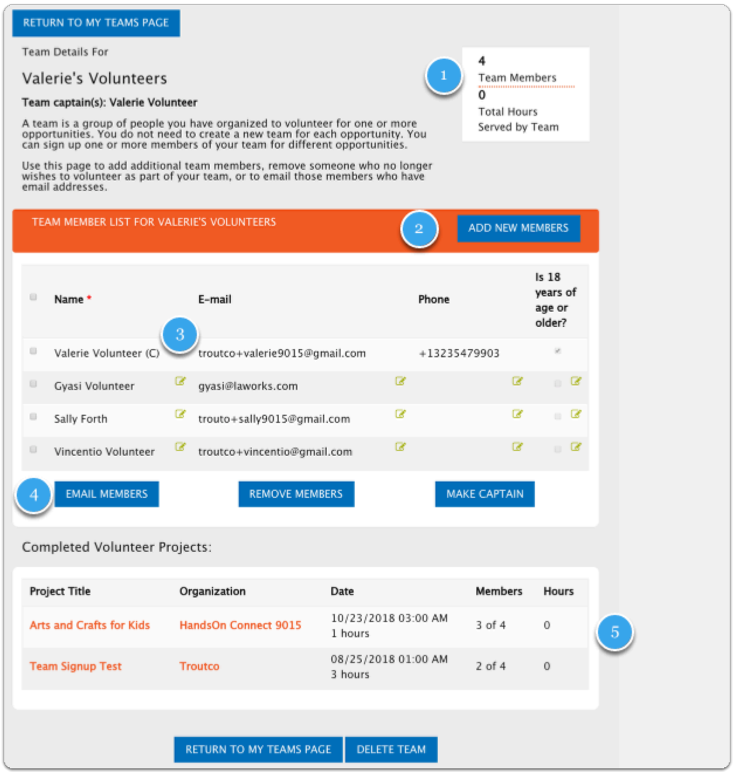
4) Click on "Participants" to edit the team members who are signed up for the listed opportunity. Or click on "Remove Team" to remove all registered team members from the opportunity you've signed them up for.

5) I am a Member of- Lists the teams that you are a member of and allows you to remove yourself from the team (6). It also shows you the opportunities that you are signed-up to participate in as a member of this team and provides you the opportunity to remove yourself from the volunteer opportunity (7)

Manage Team Page



You can click on the + sign to see details of teams where you are the captain and have additional options.



1. This section has summary information about the team

2. Click on "Add New Members" to add additional members to your team. (Note: Adding them to the team roster does not sign them up for volunteer opportunities. You'll need to go back to the My Teams page and click on Participants, to add your new team members to the opportunity sign-up.

3. You can edit existing team members info here IF they have not yet registered themselves on the public site. (i.e. you an add an email address to a team member you previously didn't have an email for!)

4.   You can select team members using the check box to the left of their name, and then Email the selected team members, Remove them from the team if desired, or promote someone to a captain.   (Note: Captains must have an email address!)

5.   You can see the team's history in this section.

Detailed information on the team itself (not the team's signups for upcoming opportunities) - can be found by clicking the **Manage Team** button.

1) Team Members and Hours Served-   Provides a quick summary about the team

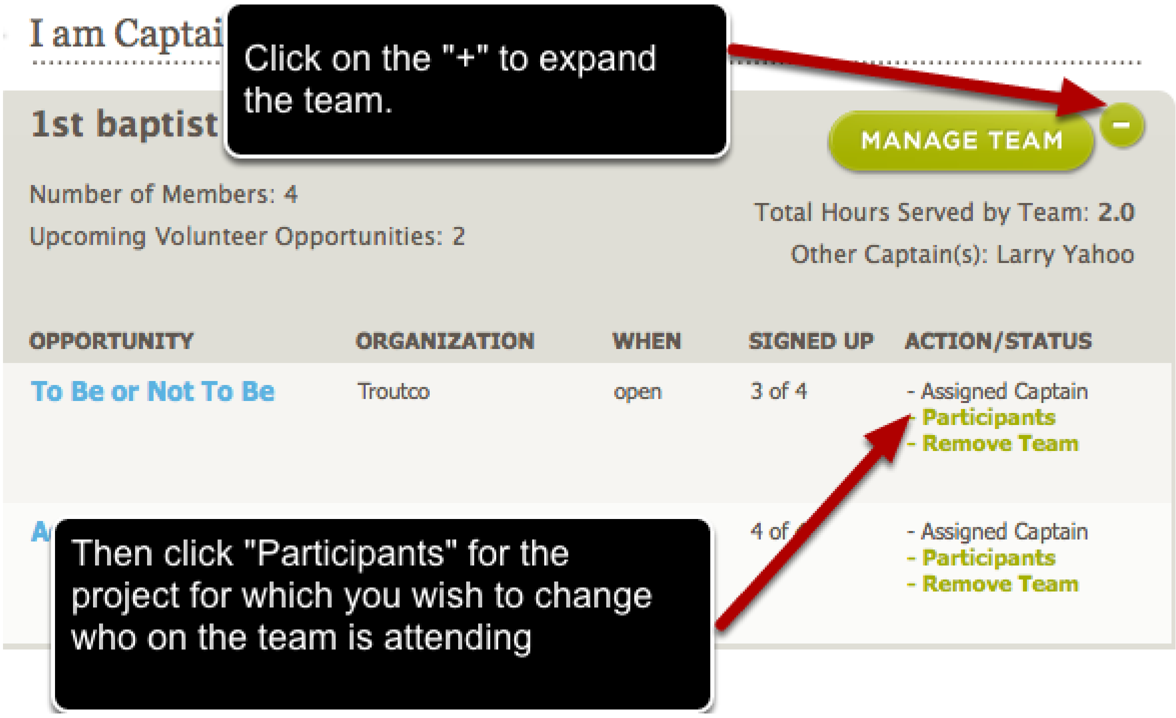
2) Team Captains- Lists all the team captains for the team

3) New Member- When you click on this button, a window opens allowing you to add new members as you did when creating a team. Please note that if you do not have a company or group association with this team, then all new team members must have an e-mail address and/or phone number. Also, age must be provided for minors, but it recommended for all team members. And to mark someone as a team captain, you must provide an e-mail address.

4) Email Members, Remove Members, Make Captain- By clicking on the box box to the left of the member's name, you can perform any of these three options. Remember, to make someone a team captain they must have an e-mail address.

5) Completed Volunteer Projects- Shows you the history of the team's participation, regardless of your partcipation in that project.

Managing Participation



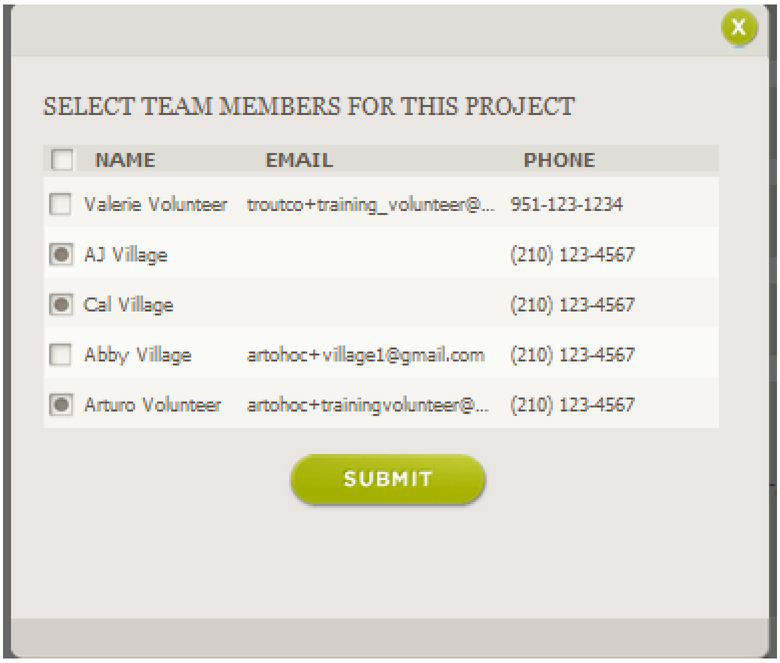
When you click on "Participants" a window opens on the screen with a list of all the team members.

The members that are currently participating will have the box to the left of their name marked, while those that aren't will not.

To add a team member to this project, simply click on the box to the left of their name. If there is still space available for the opportunity, they will be added when you click submit.

To remove a team member from this project, simply click on the box to the left of their name to remove the mark.

After making all the modifications, click "Submit."



You will then see who is currently signed up to participate as part of your team, and can remove or add team members to this opportunity as desired.

NOTE: If space is tight on an opportunity - we recommend REMOVING team members from the opportunity first, Submitting it-- thereby freeing up space . Then modify participation again and sign up others. Because the removals may take place at the same time as the signups -- you may be told there isn't sufficient space to sign up the new members.   (because the system hasn't updated the removals yet).

Adding a Small Volunteer Team Administratively

Administratively Creating a Volunteer Team

We've shown how teams are created on the public site. But what if you want to create a team administratively on behalf of a volunteer, or to track a team administratively.

Let's start by thinking how you could create a small team administratively.

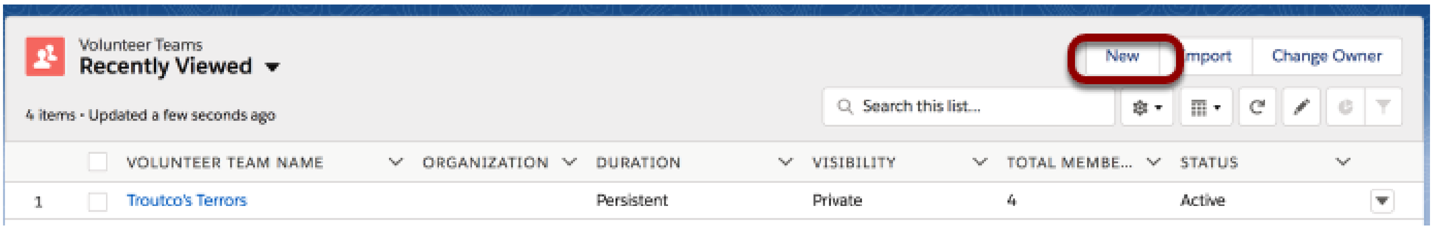
First we have to create the team.

Then we need to add the team members!

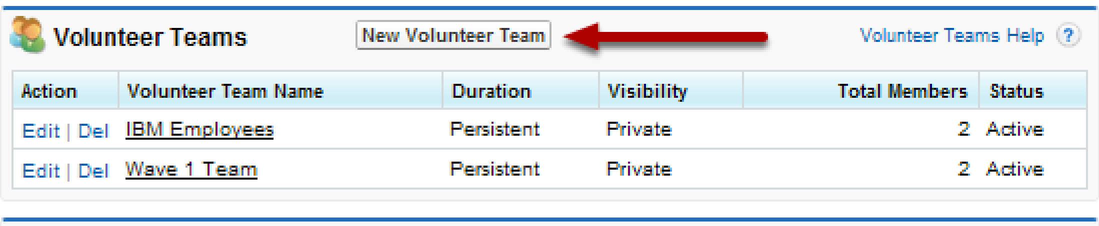
Here's how to create the team!

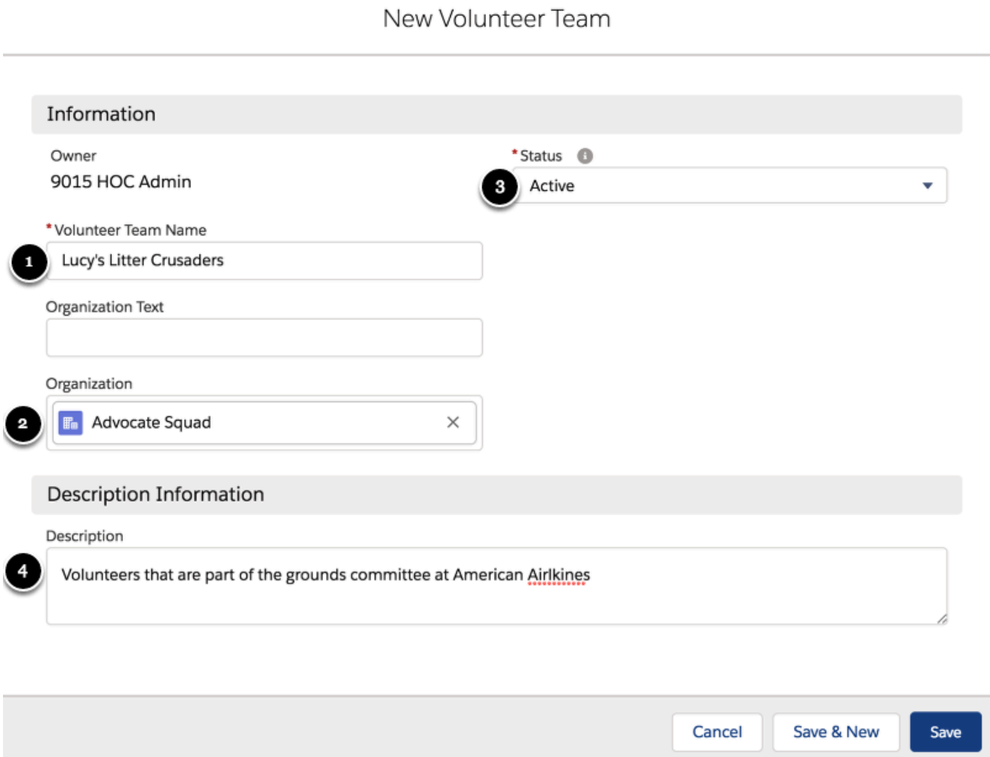
Creating a New Team

Go to the Volunteer Teams tab, and click on "New"



For Volunteer Teams associated with an organization, you can also create the team from the Organization's record, by going to the Volunteer Team related list and selecting "Create a New Team"





1) **Volunteer Team Name**- This is a required field, but does not need to be unique.

2) **Organization-** If the team is associated with an organization that is in your system, you'll be able to make the association through this lookup. (If you created the Team from the organization's record then this field will be pre-populated)

3) **Status-** The options are "Active" or "Inactive". Since we are going to use this team, we make it active.

4) **Description**- Allows you the opportunity to add a description. This helps people who are part of a team understand what the teams purpose is.

Once you have completed all the fields, click save.

Next we'll want to associate Team Members with the Team

HandsOnConnect Cloud Solutions

Administratively Adding Team Members

All contacts that you wish to associate with a Volunteer Team, must already exist within your HandsOn Connect instance.

If the contacts do not exist in the system, you can either add the contacts to your system one at a time by creating new contact records, or you can import / batch add contacts to the system

Adding Contacts as Volunteer Team Members (One at a time)

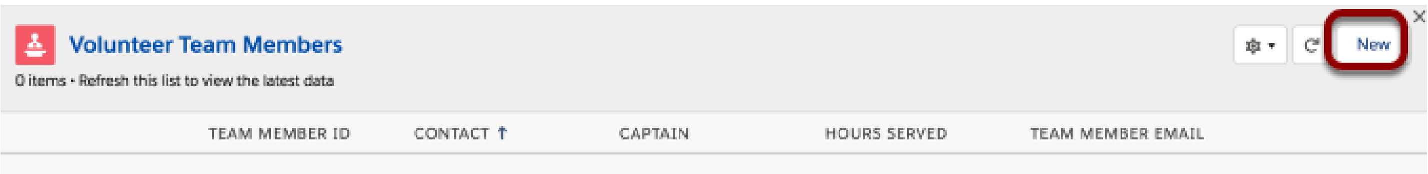
You can add team members to a team from two starting points.

a) **From the Volunteer Team record**

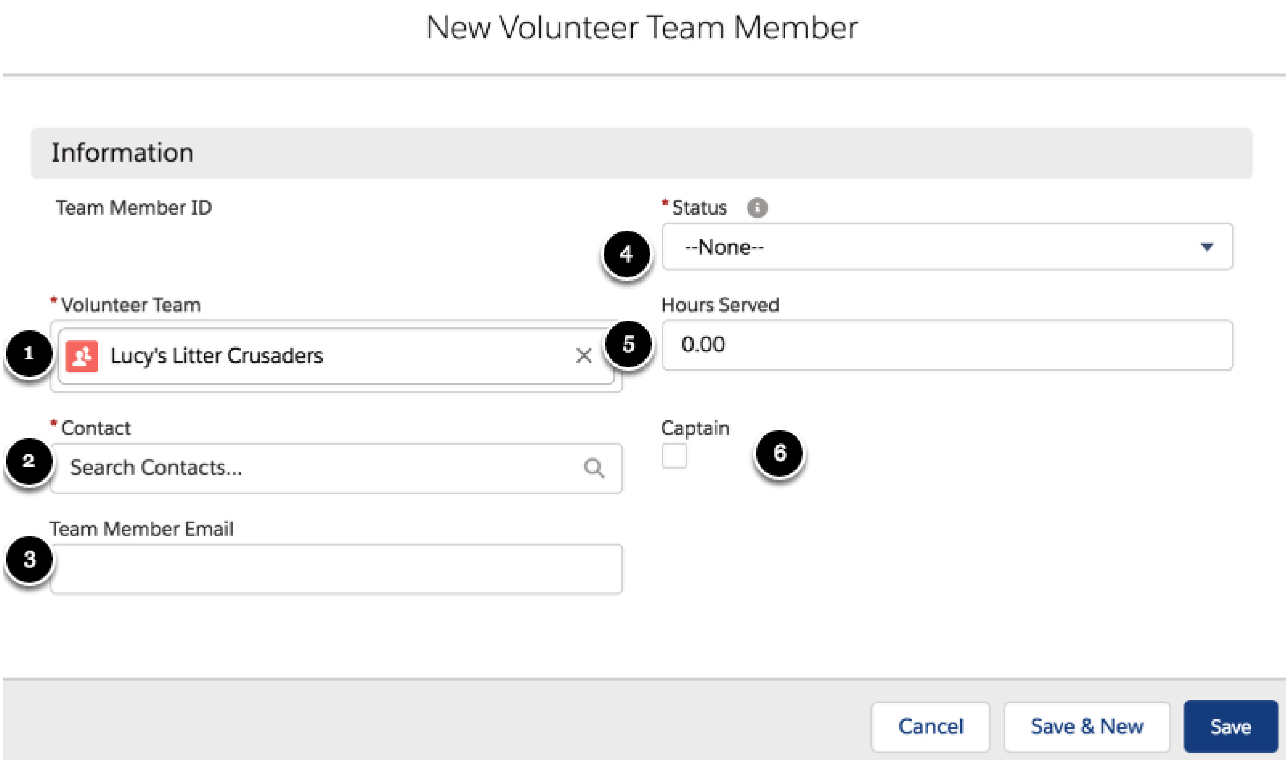
b) **From the Contact Record**, if you are adding an organization's contacts to the organization's team, you can start at the Organization record, and open the related Contacts in a new tab or window to create the Team Member relationship.

For both, the "New Volunteer Team Member" button will be present in the Volunteer Team Members related list as shown in the Team Member record below.

Since we're in the Volunteer Team Record -- let's create a volunteer team member from here:



Click on "New" in the related list for Volunteer Team Members. This will open the new Volunteer Team Member screen:



1) **Volunteer Team-** Use the lookup to find the existing team or it will bepre-populated if you started from the Volunteer Team record

2) **Contact**- Use the lookup to find existing contacts or pre-populated if you started from the Contact record. (Note: if the team member is not already a contact in the system - you'll need to create the contact record first!)

3) **Team Member Email**- Leave blank. Will populate when you've saved the record.

4) **Status**- Options are "Pending", "Confirmed", "Declined", and "Former".

For administratively created teams - you can mark 'em pending or confirmed.

If the captain is going to administer the team from the public site -- make the captain's status Confirmed! Otherwise mark them all as pending if you are just using this as a way of administratively tracking this 'team'.

5) Hours Served- Leave blank. This field is populated based on this team member's participation in Volunteer Opportunities as part of this team. Does not show hours volunteered as an individual.

6) Captain- Check the box if this contact will serve as a Team Captain for this team. All teams need at least one team captain, and will serve as your contact(s) for this team.

Once you have completed the fields, click save.

Repeat the steps above until all the team members have been added to the team. Use the Recent Items list to return to the appropriate Volunteer Team or Organization, if necessary.

Batch Adding a large team Administratively

(Advanced) Batch Creating Team Members

There are two ways to batch add team members:

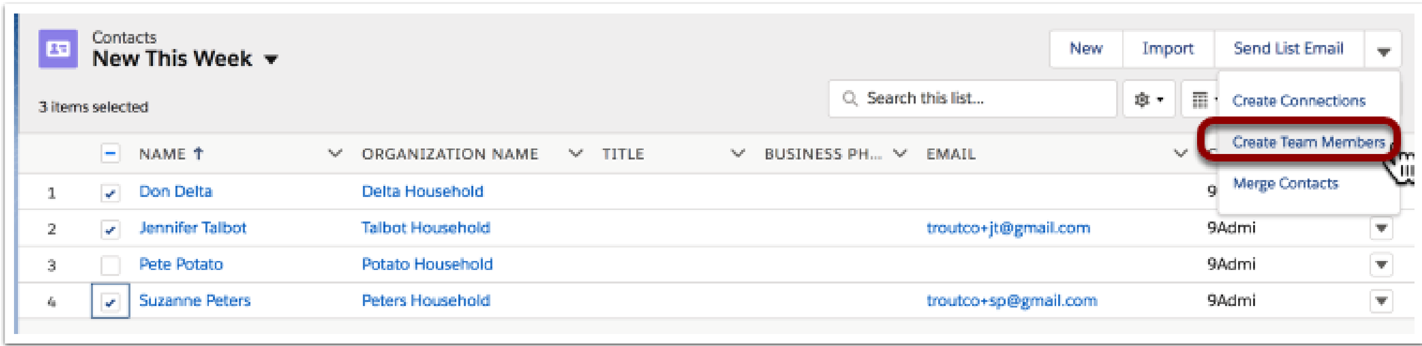
Both of these methods require your system administrator to activate these features.

Method 1: Create Team Members from a contact list view

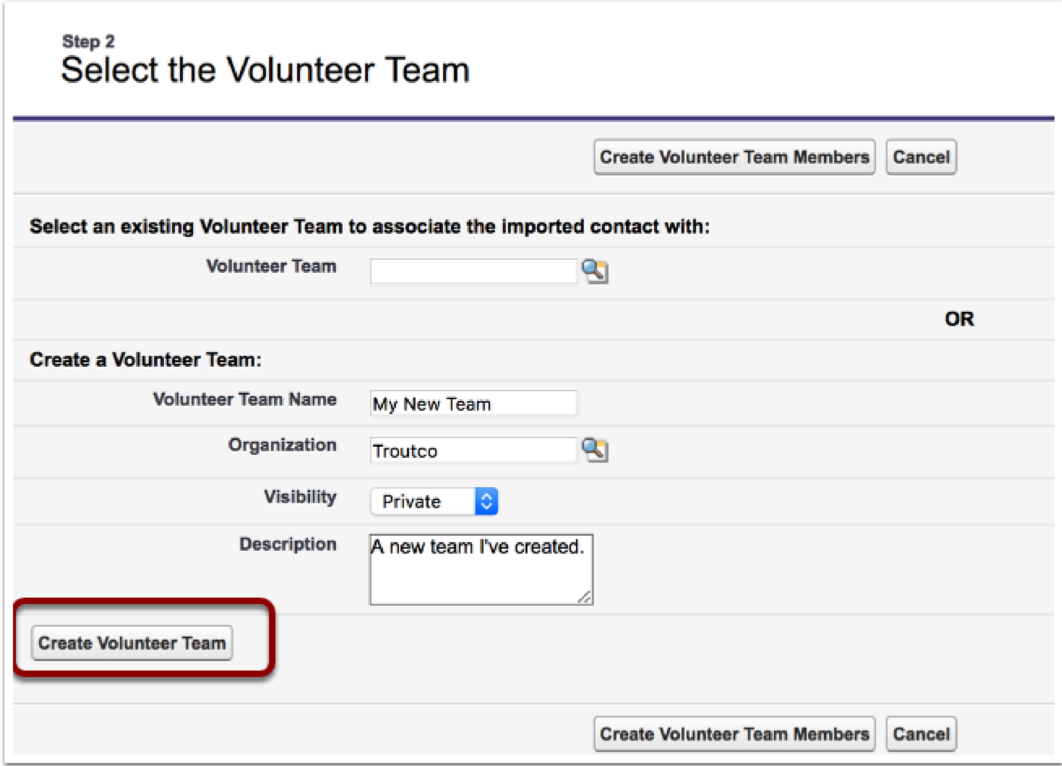
Go to the Contacts Tab, and select any list view (other than "Recently Viewed Contacts". You may want to create a view that gives you the contacts you want to add to a team.

In the view - put a checkbox next to each contact you want to add to an existing team.

IN the actions menu select "Create Team Members"

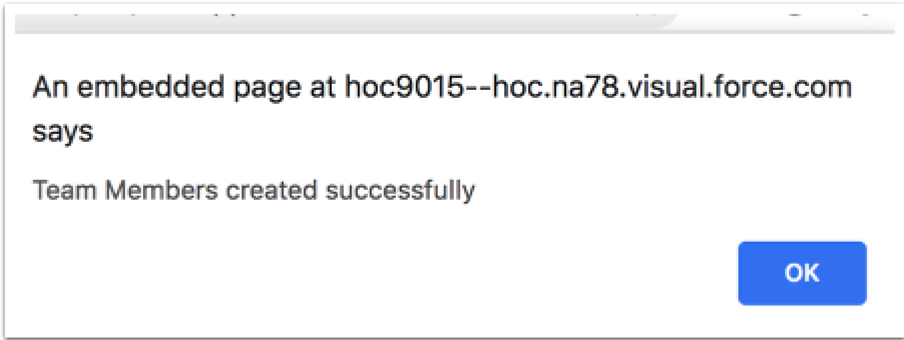


You'll have an option to select an existing team, by using a look-up (if you've already created the team), OR to create a new volunteer team.



NOTE: The field "Visibility" is no longer used in HOC 3 but IS in this form. Leave the default setting as 'private"

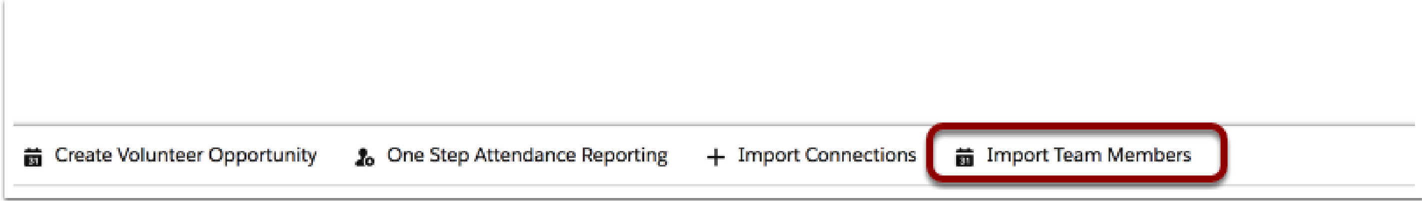
If you are creating a new volunteer team - click on "Create Volunteer Team" - then your new team will automatically be populated in the look field 'Volunteer Team" -- NOW click "Create Volunteer Team Members"



Method 2: Importing Team Members

In Classic you'll find a link to 'import team members' in the left sidebar.

In HOC Lightning - you'll find an 'import Team members" option in the utility bar:

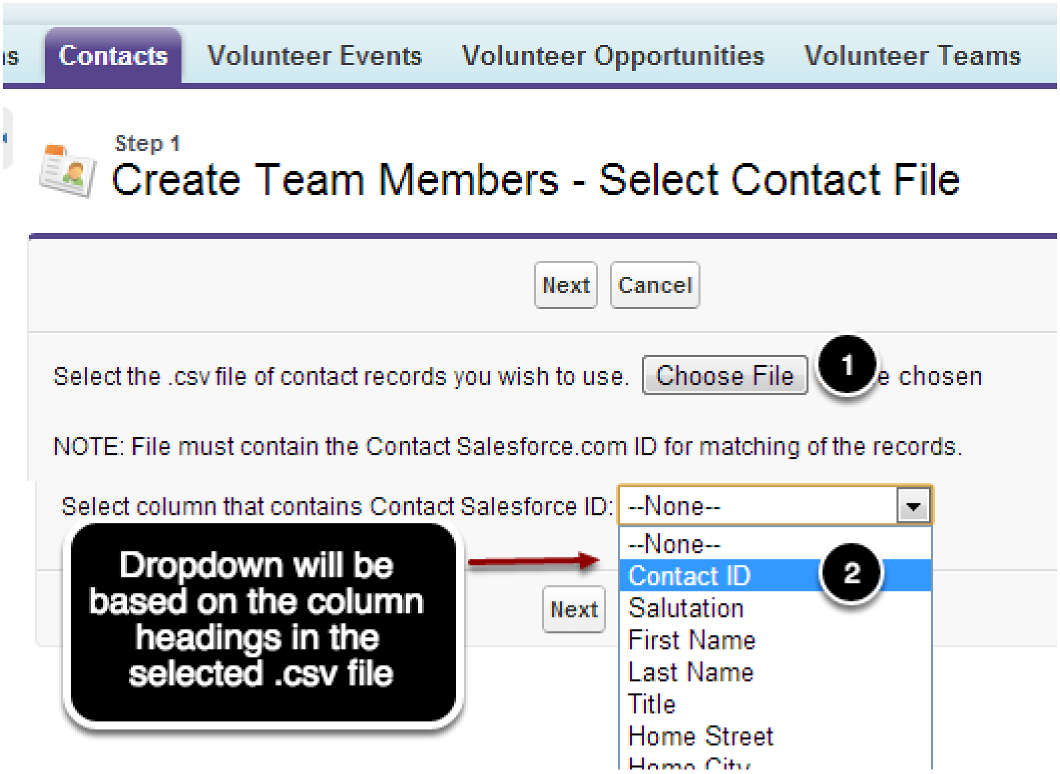


In the method - you'll need to prepare a speadsheet of data to import. You can get the relevant info you need by running a report on the contacts you wish to import.

1. Include the Contact ID column in the report. The Contact ID is the Salesforce ID for that record and is a 15-18 digit alphanumeric number
2. Export the report as a **.CSV** file.

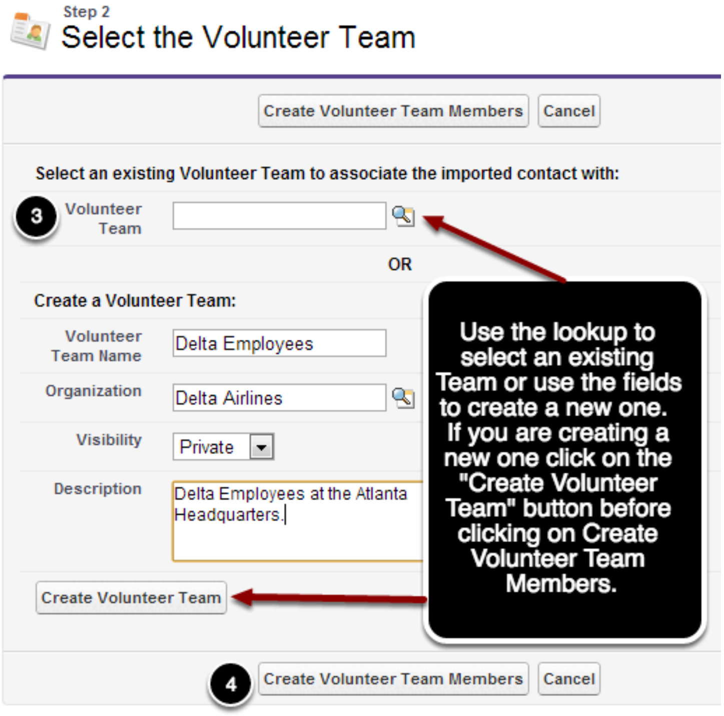
Importing Team Members - Step 1

This first step is the only thing different than Method 1 above. Since you are not selecting the contacts from a 'list view' -- you'll need to decide which contacts you wish to import as team members, but including a file that has the contact ID of each contact you wish to add.



Importing Team Members - Step 2

From here, the process is the same as when selecting from a list view as described above.


Step 2
Select the Volunteer Team
Create Volunteer Team Members
Cancel
Select an existing Volunteer Team to associate the imported contact with:
3
Volunteer Team
OR
Create a Volunteer Team:
Volunteer Team Name
Delta Employees
Organization
Delta Airlines
Visibility
Private
Description
Delta Employees at the Atlanta Headquarters.
Create Volunteer Team
Use the lookup to select an existing Team or use the fields to create a new one. If you are creating a new one click on the "Create Volunteer Team" button before clicking on Create Volunteer Team Members.
4
Create Volunteer Team Members
Cancel

Customizations available for Teams

Team rules and page text updates available by request

By default, teams work as described in this manual's chapter "Team Overview"   However, in order to meet the different needs of a range of organizations that work with groups of volunteers, there are number of customizations available that can be enabled in your instance of HandsOn Connect by request.   This article summarizes the range of team variations and changes that are available, centralizing the notes on the many new team-related options that have been rolled out over the last year and announced via release notes:

Option: Change the default team creation rules

This article summarizes the default rules for the creation of teams. If however, you wish to disable the default team rules, and instead require (or not require) certain fields, this can be done by request. See this article for more information.

Option: Associate teams with selected organizations in your data

By default, when creating a team, you are not required to name an associated organization. Even when someone fills in an organization name, it is just a text reference to the organization, and not automatically associated with a corresponding organization in your data. With this option enabled - you can require a search of your existing organization database, and have team captains make that association if it exists. See this Chapter for information on how this option works, and how to administratively update your data to determine which organizations become searchable.

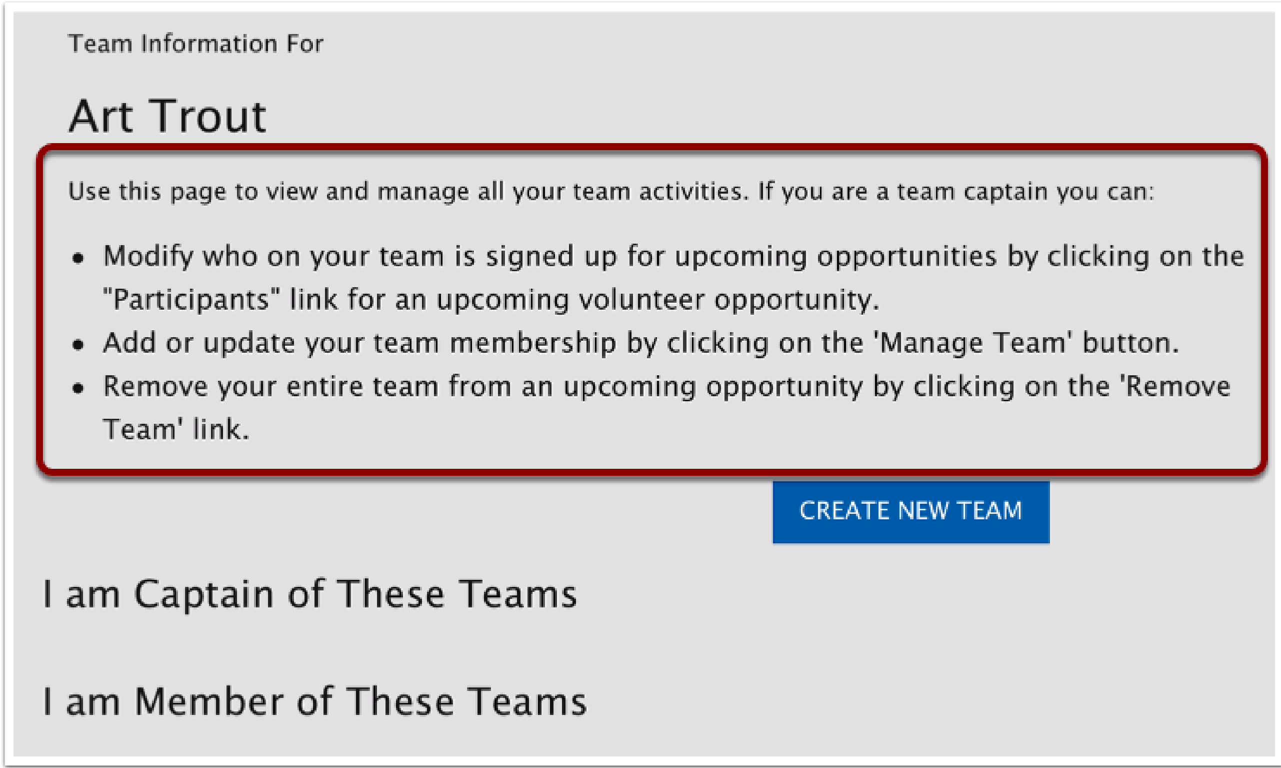
Option: Allow team captains to sign up anonymous volunteers

A team is always made up of named team members who can then be signed up for a volunteer opportunity by the team captain. With this feature enabled, a team captain, during opportunity sign-up, can sign up existing team members AND reserve spaces for unnamed volunteers (guests / anonymous slots). See this article for a description of how this option works, and how to administratively enable it. (Note: This feature can be enabled by your system administrator and requires no request to the support team in order to use).

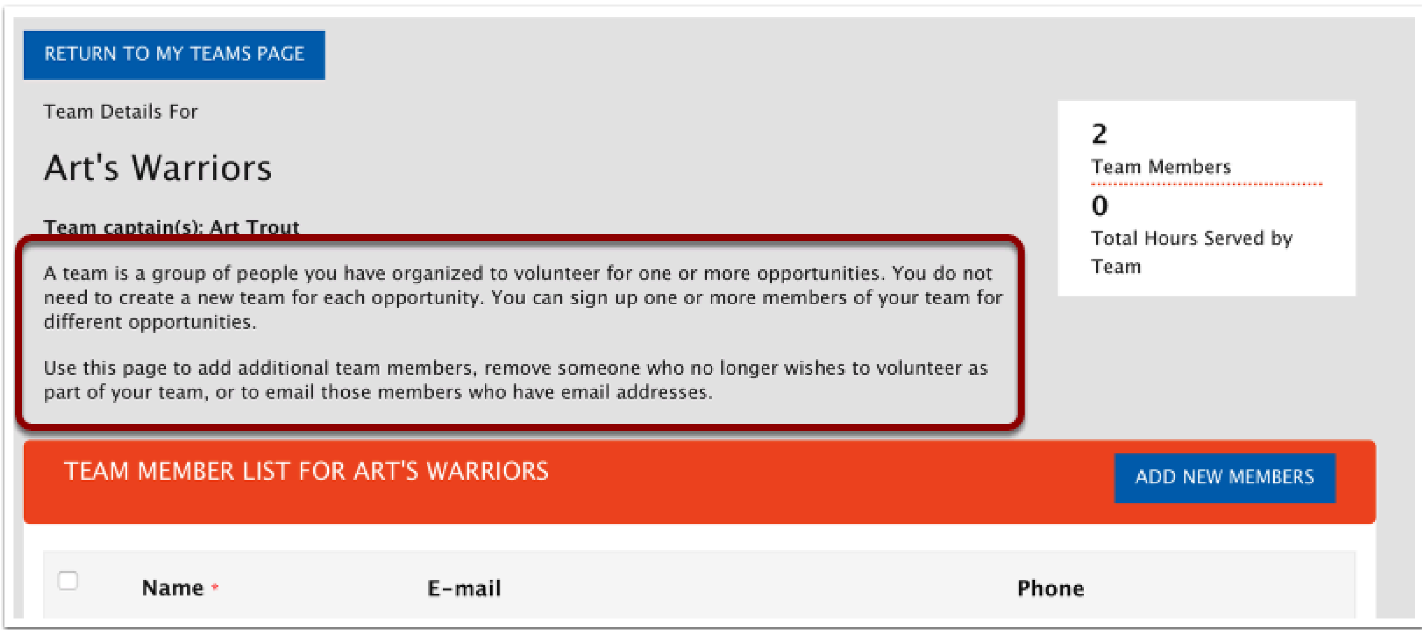
Edits possible on team-related system pages.

We continue to expand the Beta Program of being able to request changes to the [Team Creation Process](), and changing the default text on a number of team-related pages. Here is the list of pages where the content can be changed for you by the support team:

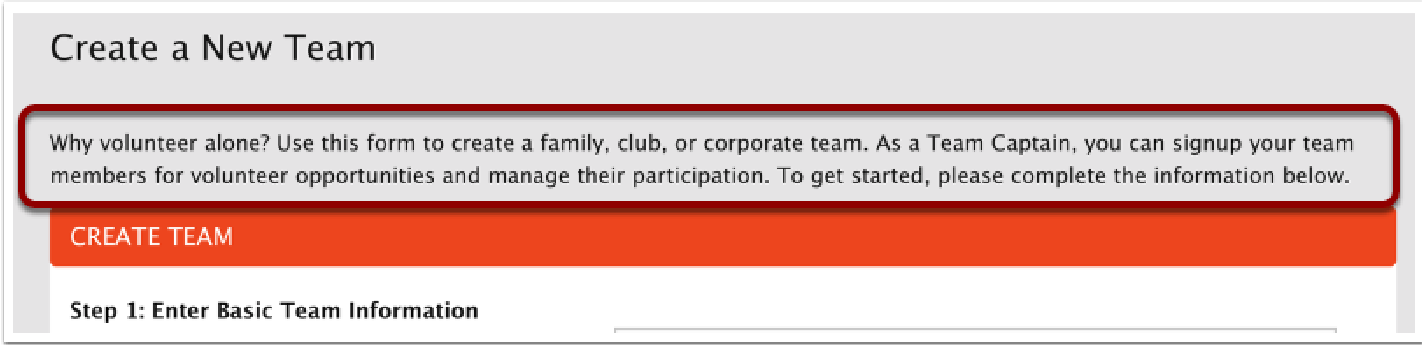
/my-teams



- **/my-teams/details**



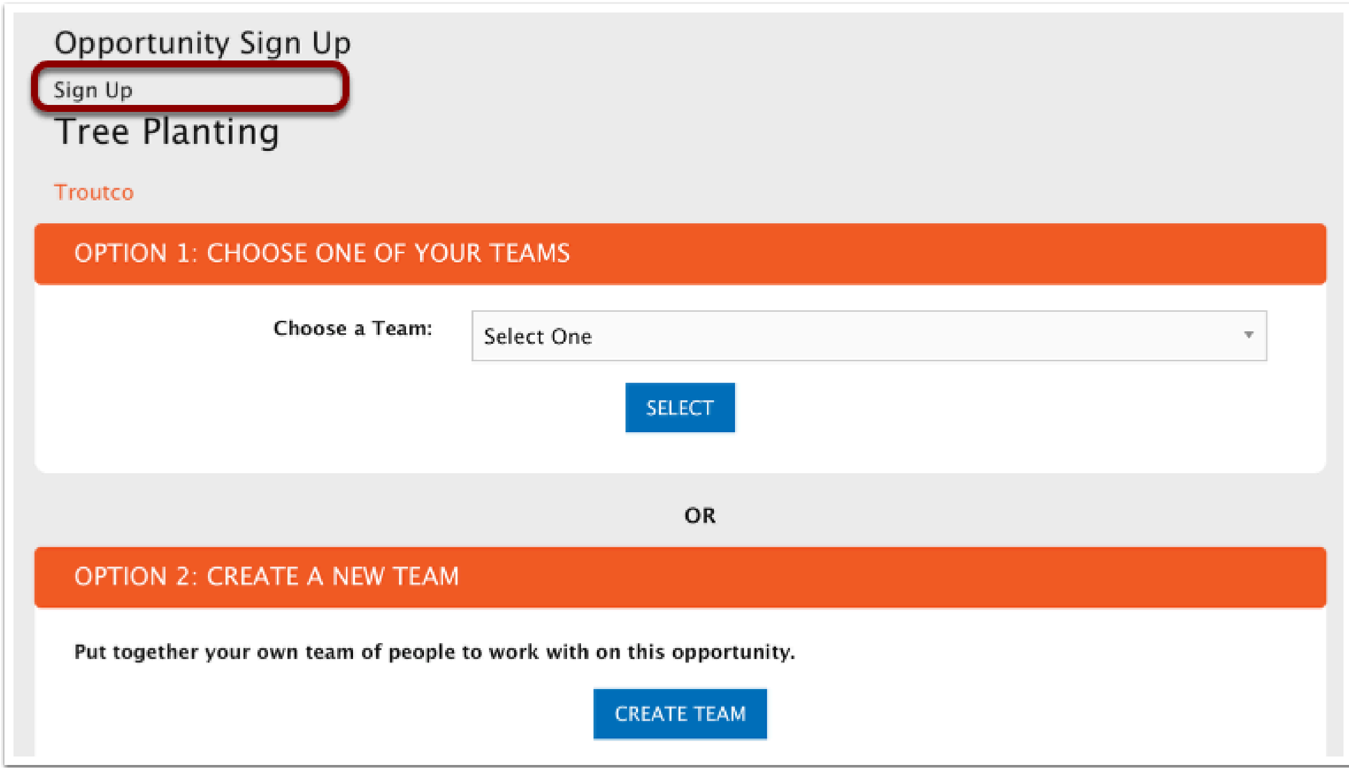
- **/my-teams/create**



/Opportunity-Signup-Team/

/**Opportunity-expressinterest-team/**

You can add additional content to place on the page that appears when you sign up or express interest as a team (in case you want to add additional information



While these pages are not yet accessible to you in the CMS - the support team has access to edit the text for you if your business needs require it. Please open a support ticket if you need this text edited on your site, and indicate which page(s) and the content you wish to have to replace the editable content on these pages.

You do have direct access to edit the Success Pages after a team signs up or expresses interest. Those pages are available in the CMS under Content / Pages

- Volunteer Opportunity Confirmation - Team Express Interest
- Volunteer Opportunity Confirmation - Team Sign-Up

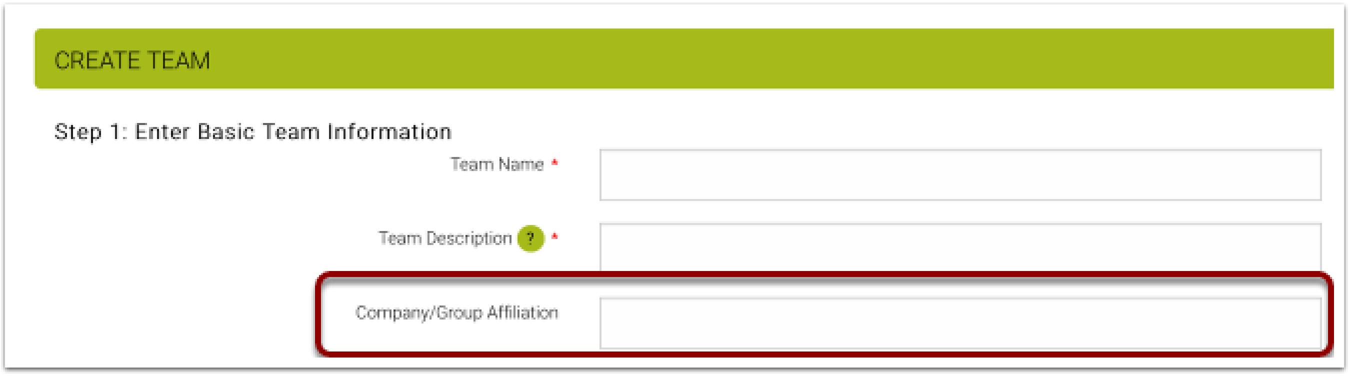
This capability is still in Beta - and may not be available for all site designs.

(Beta) Associating Teams with Existing Accounts/Organization

What's new about creating teams with the "Associate Teams with Existing Accounts" option activated.

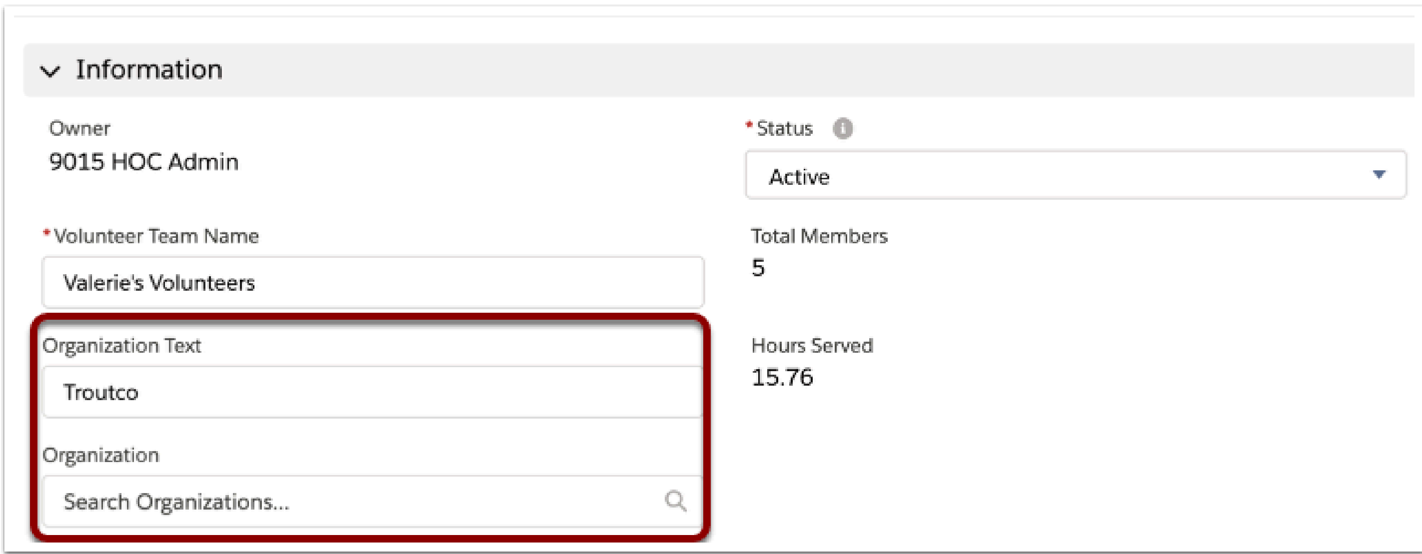
How Team Creation works by default

When creating a team, there is an optional field called "Company/Group Affiliation". This ia text field that gives you some idea about the group creating the team:



In Salesforce, when the team record is created, this 'Company/Group Affiliation' populates the field "Organization Text".

Then, if you wish to associate the team with an existing organization record, you can manually edit the lookup field "Organization" and actually associate the team with an existing organization, if you desire.

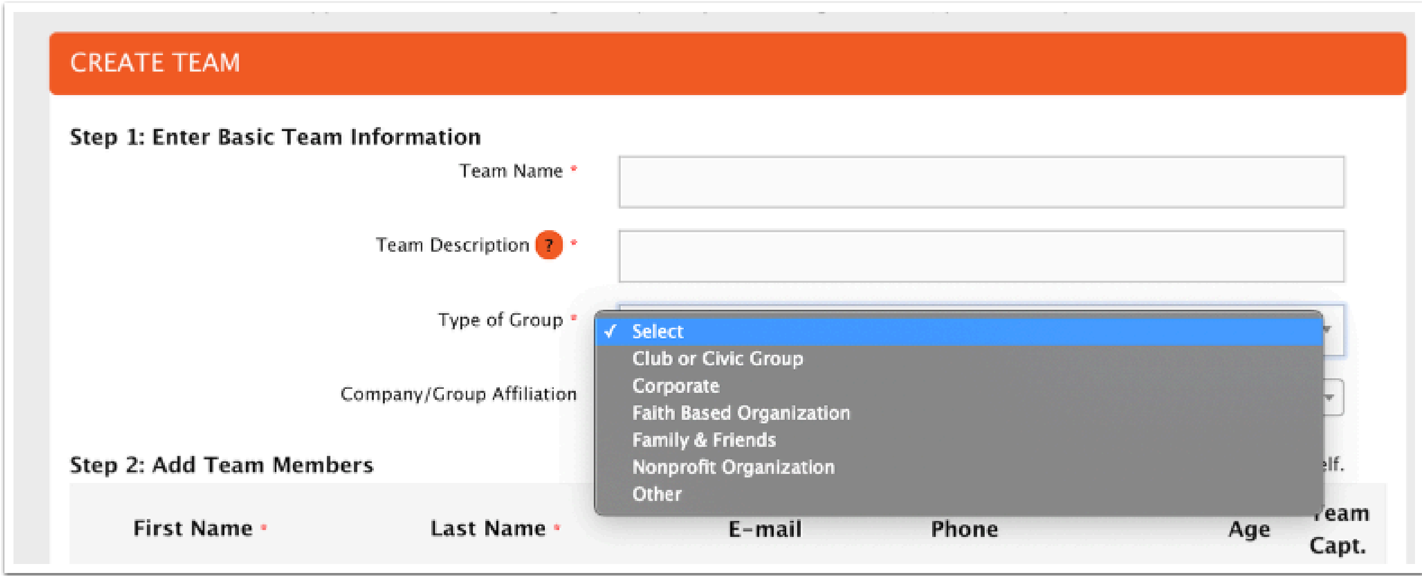


What changes if you opt into "Associate Teams with

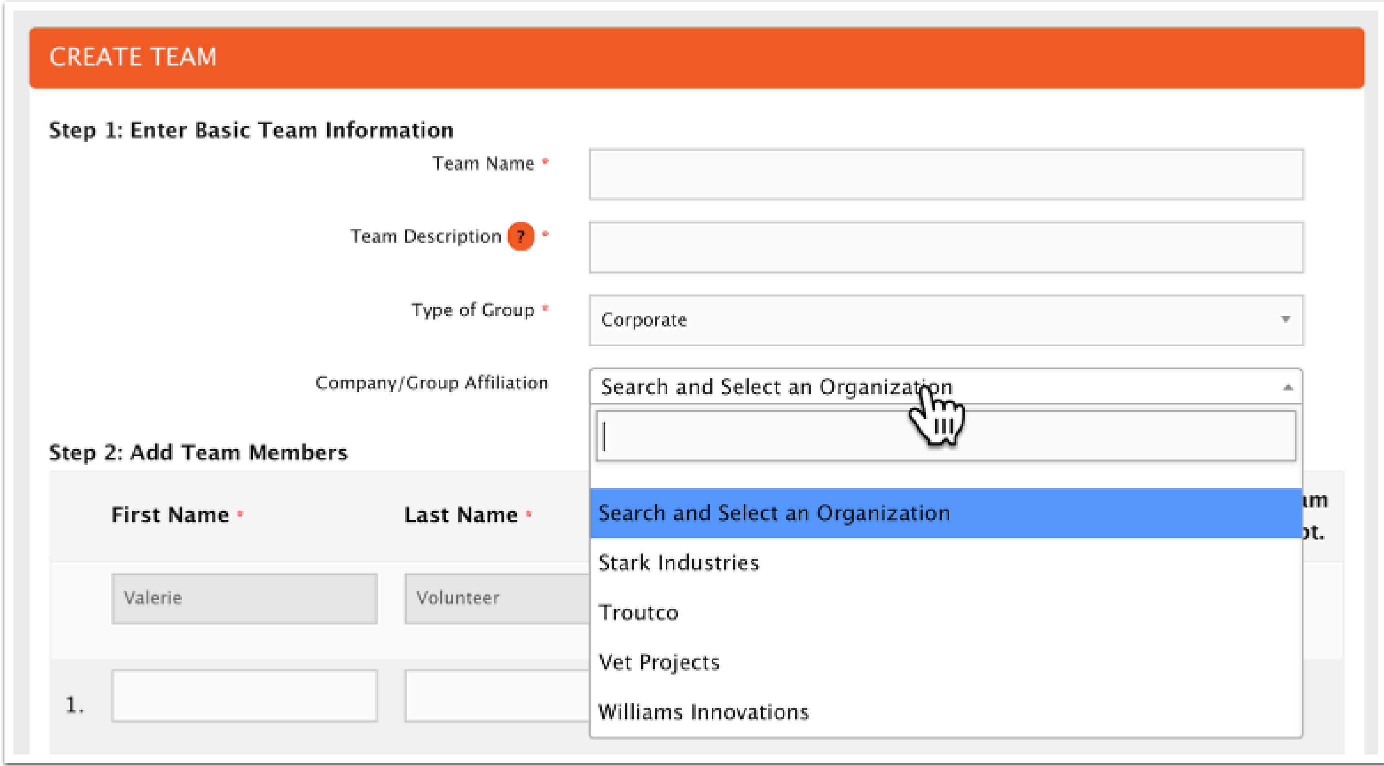
Existing Account"

1) A new field "Type of Group" is added to the team creation process.   This allows you to get more information about what sort of group the team is:

The picklist options can be added to or edited (except for "Family & Friends", which has a special function with this feature.



2. The field "Company / Group Affiliation now becomes a 'smart search'.   You administratively decide which accounts/organizations in your Salesforce information you want to appear as options, and when the team captain types in the company/group name -- it will look for matches from your Salesforce data, and allow any existing organizations (that you've specified to show up in search), to be selected.

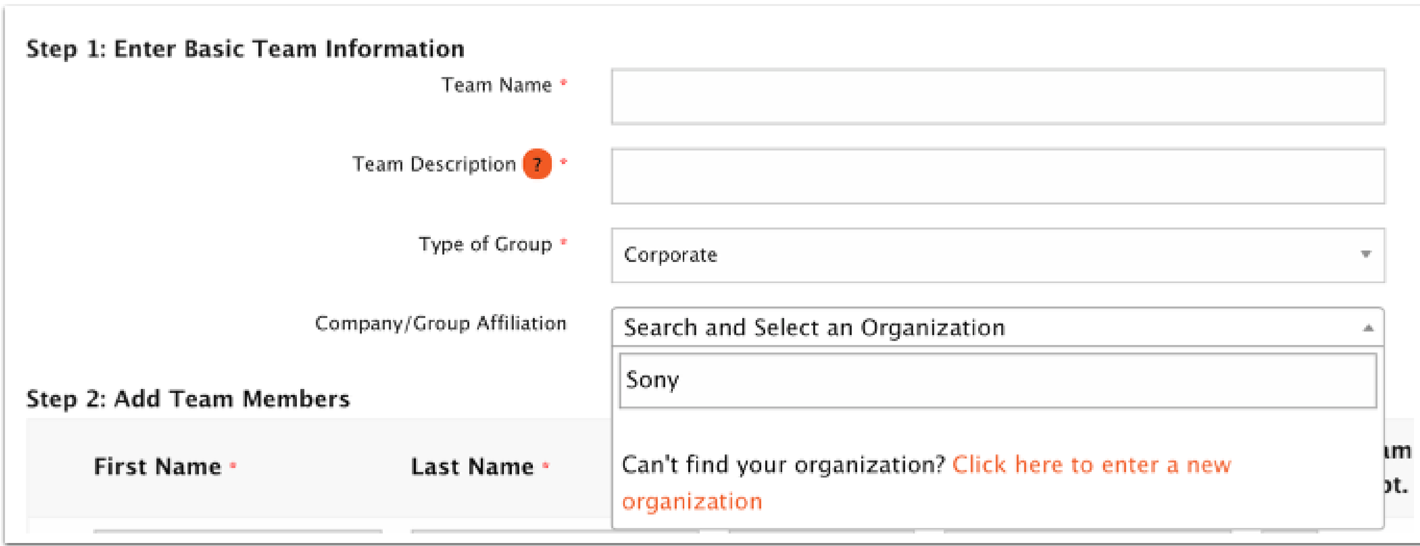


If an existing match is found and selected:

The Team Record will automatically populate the lookup field and associate the team with the organization record.

If an existing match is not found:

If someone types in a company or group name that isn't in your Salesforce data as an existing account you've enabled for team lookup - then a message will be displayed:



Clicking on "Click here to enter a new organization" will put whatever Company / Group Affiliation they've entered into the team record in the field "Organization (Text)" as it did previously. (It will not create a new account in Salesforce -- but you can choose to do that if you desire -- or just except the affiliation name text as a reference to the team.

> The advantage of using this feature is that IF you have existing organizations that you wish to associate with teams - this feature will automate that process for you.

What about groups of type "Family & Friends"?

If the type of group is specified as "Family & Friends" - then the "Search and Select your organization option" will not be displayed. This is because you are not going to have organization records for families and teams made up of friends.

By not displaying the "Search and Select" dialog, it saves them a step and possible confusion :-)

How do you start using this feature? How do you determine which organizations to include in search?

See this article for information on requesting this feature, and the administrative steps you need to do to begin using it.

Administrative Speedup to begin Using Team Creation with Account Lookup Feature

If you wish to start using this feature - your system administrator will have to do some mass data updates and determine how to handle new accounts in the future. Read through this article to see if you're comfortable with the needed administrative speedup required.

There are three steps to start using the new Team Creation with Account Lookup Feature. This should be done by your system administrator.

1. Request that the Feature be Activated for your organization

Open a help ticket and request adding the "Team Creation with Account Lookup" feature.

Because you'll be altering the default team creation rules by adding the field(s) organization lookup and type of group, you'll no longer be able to use the Default Rules for Team Creation. So please define which fields you want to make visible, and which fields you want to make required when creating a team:

- Team Description
- Email
- Phone
- Age
- Type of Group

The fields Team Name, First Name, and Last Name will remain visible and required, but the others can be hidden and/or required.

These new settings will replace the default team creation rules which are:

"When creating a team the fields Team name, Description, First name and Last name are required. Also required are EITHER a unique email address OR a phone number for each team member UNLESS a value is put in the field Company/Group Affiliation, in which case you do not have to supply an email OR a phone number for the team members."

When activating this feature - you can no longer use the either/or requirement for email / phone number. (Also note that if you make email address required, each team member will have to have a unique email address, which can make it difficult to create family teams, or teams where the captain does not wish emails to be sent to team members).

2. Add two new fields to page layouts (and check profile

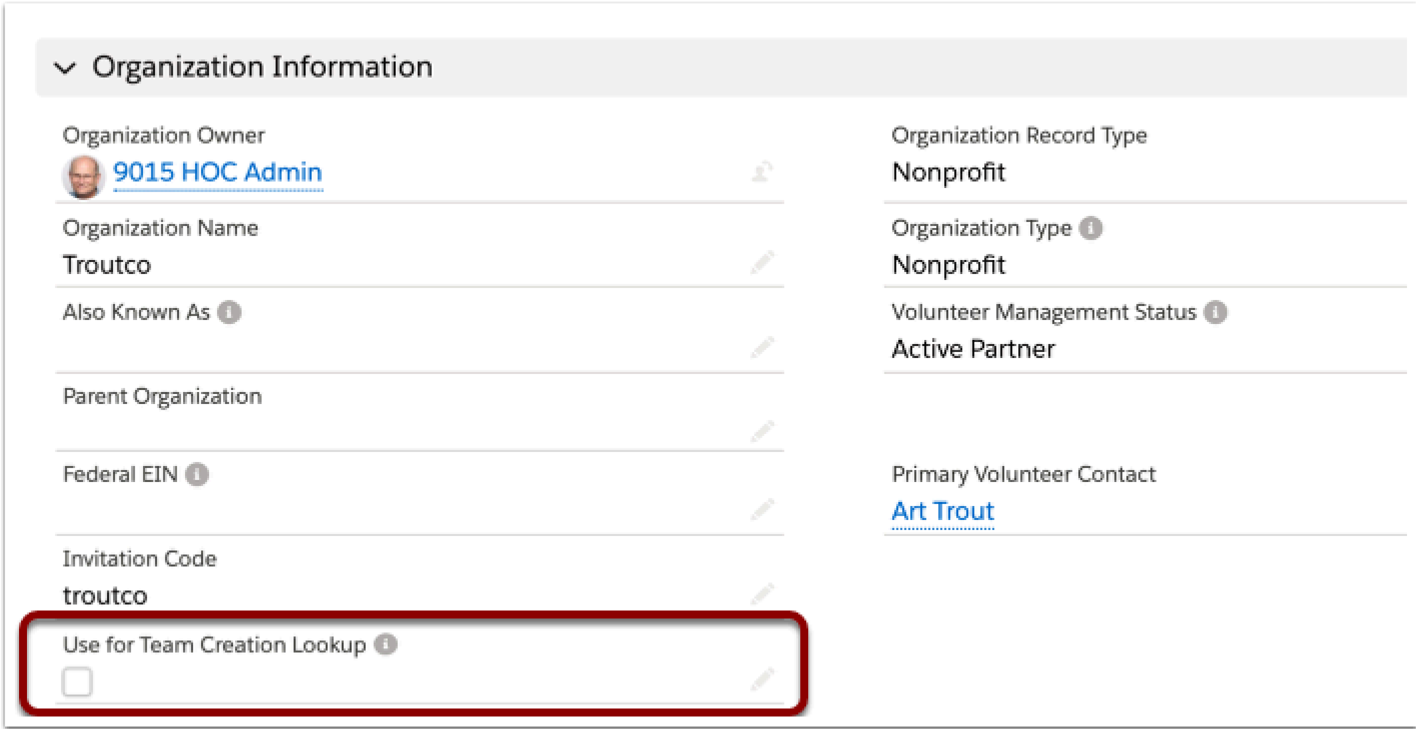
access)

Accounts (Organizations)

Add the field **"Use for Team Creation"** to the page layouts for Business and NonProfit Organizations.

Do not add it to the page layouts for Household or Individual Accounts:

Check the System Admin and Staff profile and make sure they have access to read and write to this field.



Volunteer Teams:

Add the field "Type of Group" to the page layout you are using for Volunteer Teams.

Check the System Admin and Staff profile and make sure they have access to read and write to this field.

Optional: If you wish to edit the picklist values of "Type of Group" you can do so. However, do not delete, edit, or change the picklist value "Family & Friends", as it has a special function when using this feature.

3. Update Existing Account Records you wish to be searchable when creating teams.

For any account record you wish to be searchable and associated when creating a team -- update the account record by checking the checkbox "Use for Team Creation Lookup". Only those accounts with this box checked as true - will be found when searching during team creation.

The easiest way to do this would be to create a list view of accounts that you'd like to include, include the 'Use for Team Creation Lookup" field in the view - and do a 'mass update' of account records (what record type at a time).

See this video for a quick tutorial on how to do a mass update of account/organizations records to include them in the team lookup once you have it activated. (The video also shows you how this will work on the website):

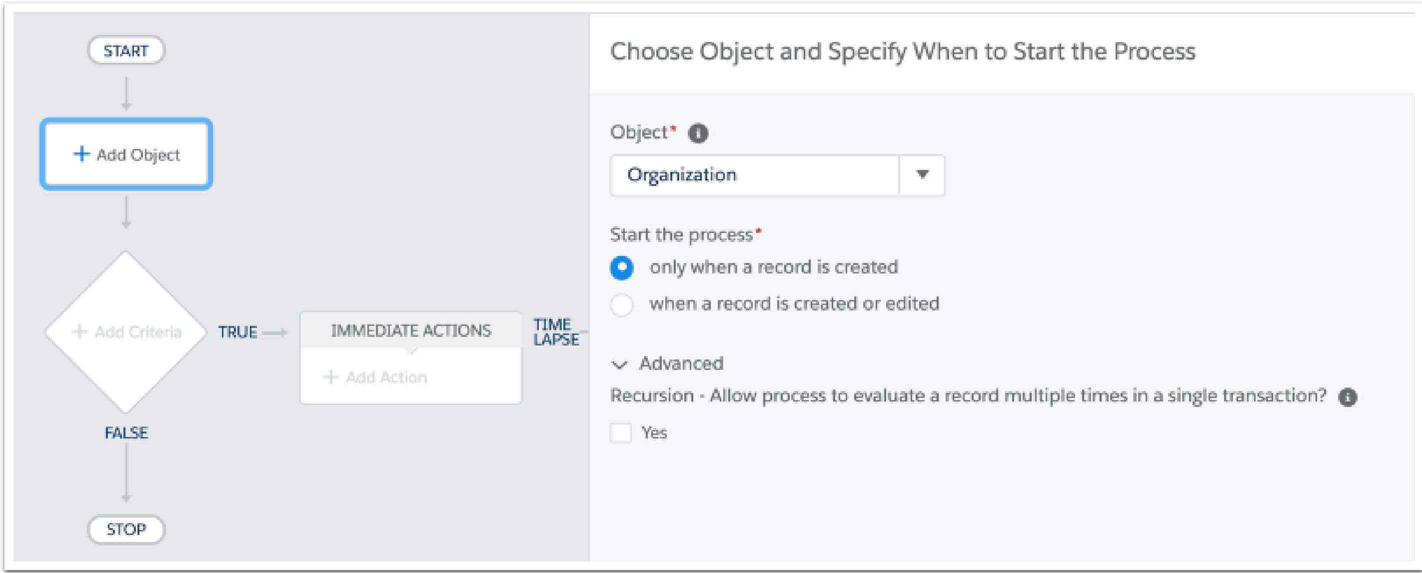
https://screencast.com/t/5C25O5O34asB

How do you want to handle new organizations in the future?

If, going forward, you ALWAYS want to include all new organizations that are created in team creation search - you can write a workflow rule or process, that says "When a new organization is created of record type Business or NonProfit" then - as an immediate action, update the field "Use for Team Creation Lookup" to True.

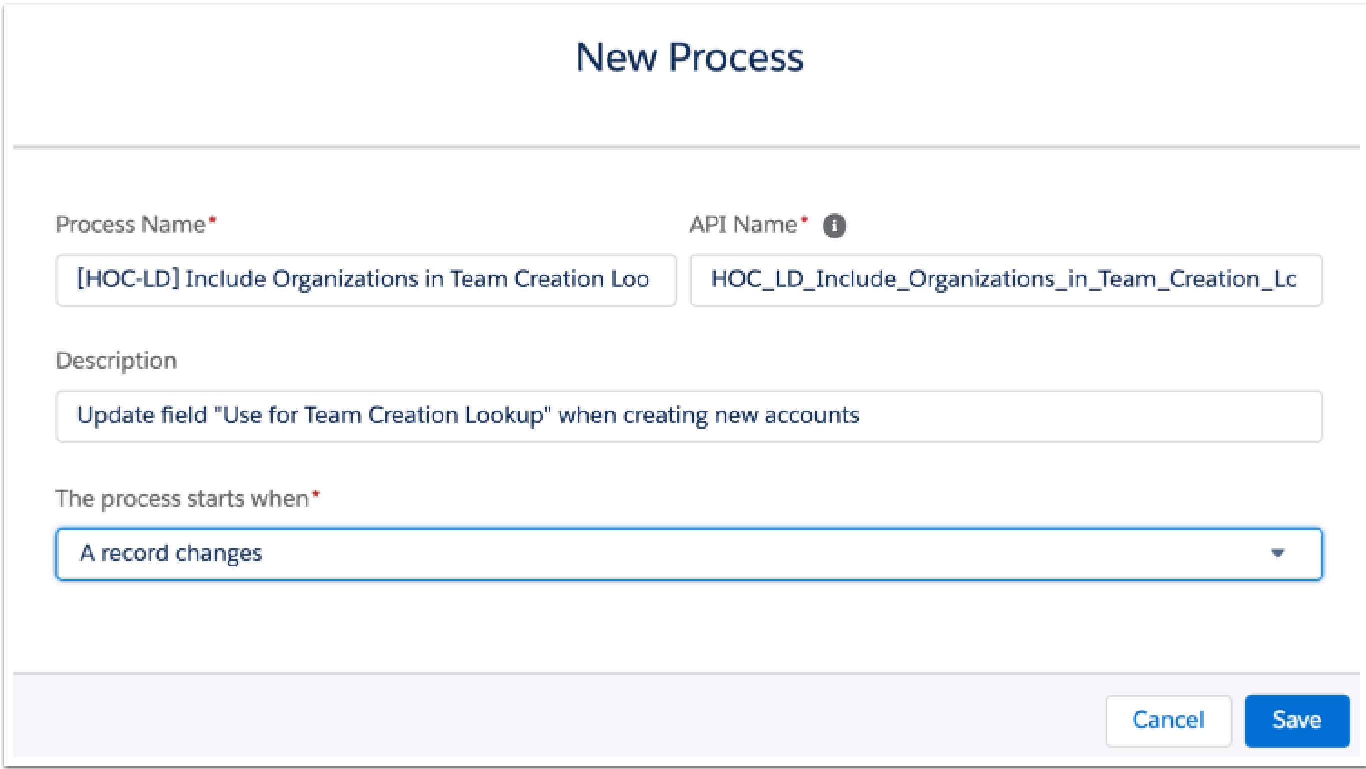
Or just update the field on a case by case basis when you create new organizations.

Example of a process to automate including new accounts in team creation search:

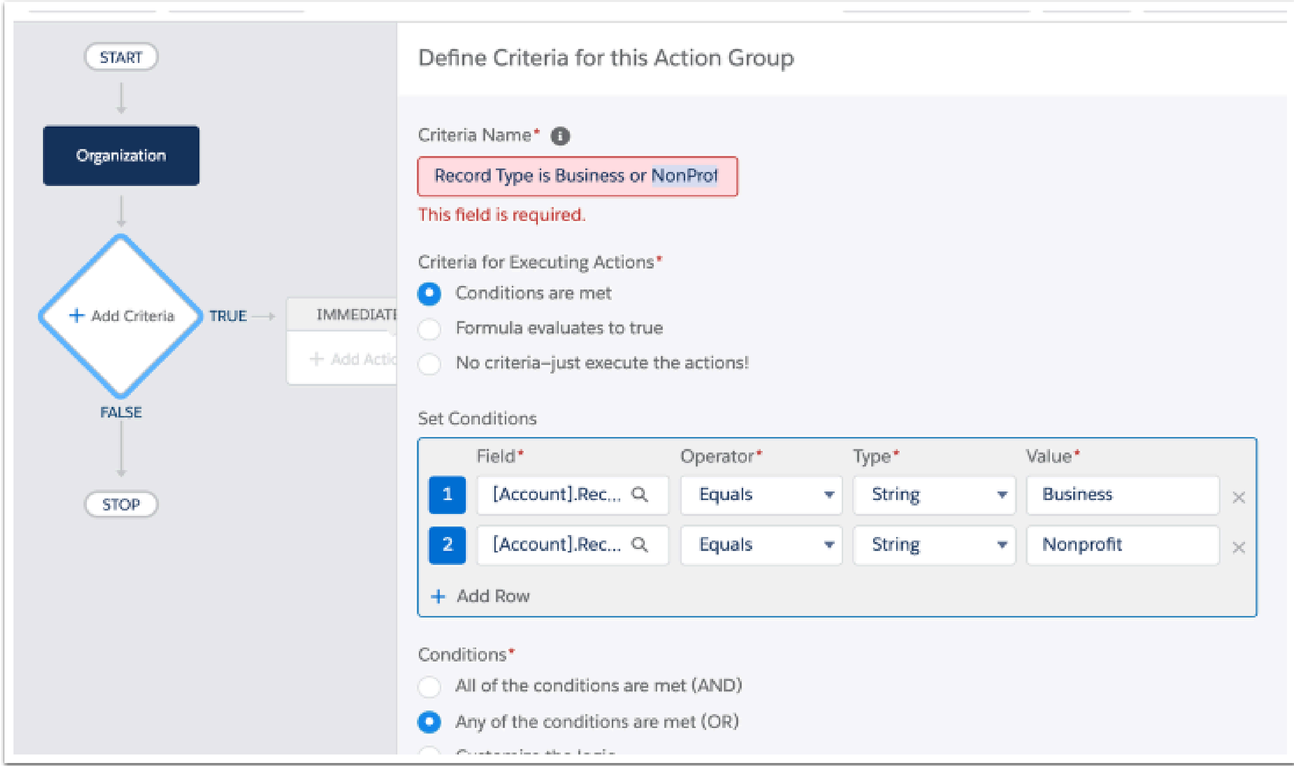


This was created using process builder:

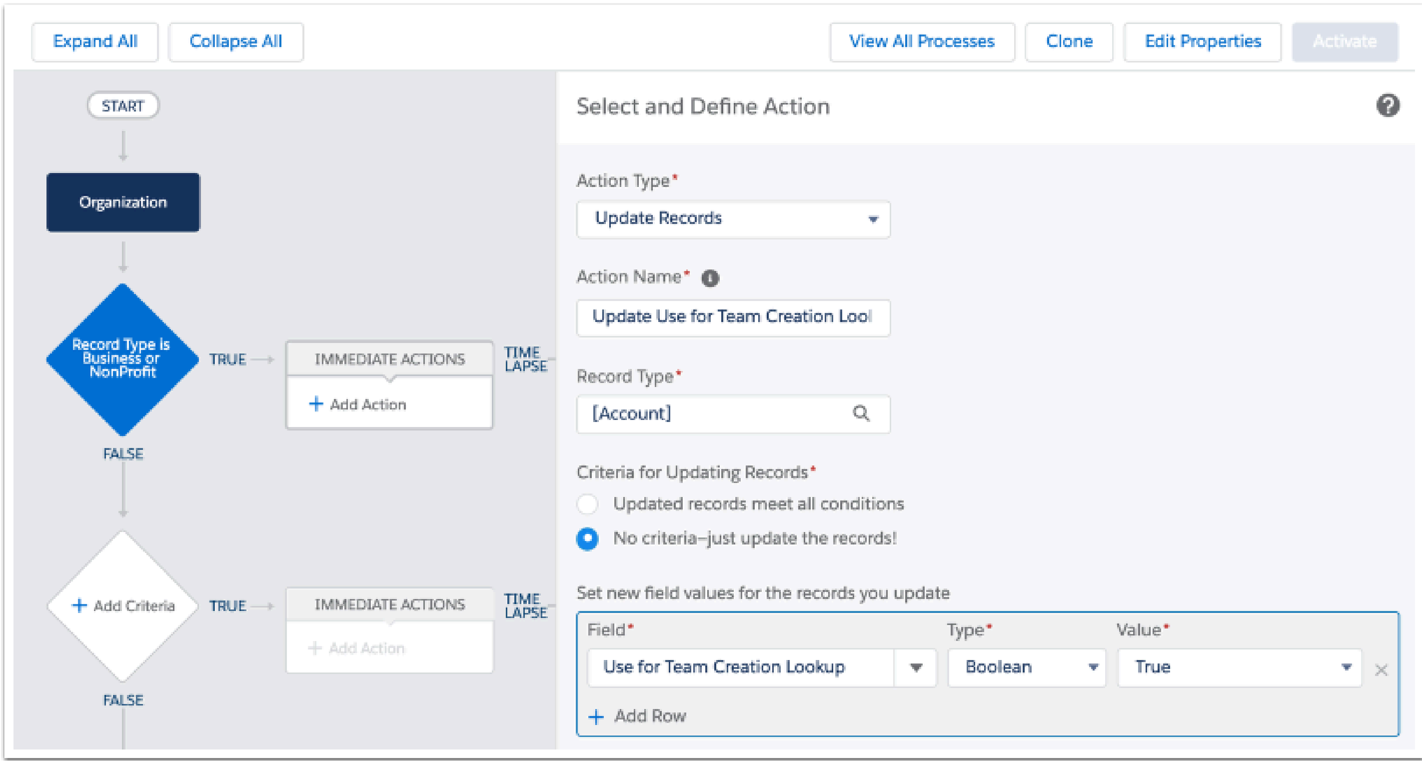
Add Object: Organizations



Criteria: check Organization Record type > Record Type Name is equal to Business OR Nonprofit



Immediate Action: Update a record (The record that started the process). Update Use for Team Creation Lookup to True.



Save and Activate this process and whenever a new business or nonprofit organization is added to the system, the Use for Team Creation Lookup checkbox will be marked as true.

(Beta) Allowing Team Captains to sign up anonymous volunteers

(Advanced) Allowing Team Captains to reserve space for unnamed team members

By default, team captains who wish to sign up team members for occurrences of volunteer opportunities, must first create a team, and name all the team members they are signing up. Subsequently, they can choose an existing team, and again, say which named team members they wish to sign up for the opportunity.

This practice has been the norm in HandsOn Connect, as it more or less forces a team captain to actually know who is attending as part of their team, and avoids the danger of them over-estimating how many people they expect to attend as part of their team.

However, in some circumstances, there are occasions when you have an opportunity that needs a large number of volunteers and/or you are working with large teams, often corporate teams, who want to 'reserve' space for a team of 25 people - but may not know who those people may be yet. In those scenarios, you may want to allow a team captain to sign up a team of themselves, perhaps 4 or 5 people whose names they know and have added to the team so far, and maybe also 'reserve' an additional 20 slots for team members yet to be named.

In the past, this was only possible to do if the team captain contacted the opportunity coordinator, who then reserved x number of "guest volunteer' slots in the connection associated with the team captain. (In some cases, team captains made up imaginary team members named 'anonymous team member 1, 'anonymous team member 2' etc... which reserved the slots, but made a bit of a mess of your data :-(

With this new feature (if enabled by your system adminitrator) - its possible for you selectively choose Volunteer Events, Volunteer Opportunities, or individual occurrences, where you opt to ALLOW a team captain to reserve slots for unnamed team members, as part of the signup process.   Here's how it works!

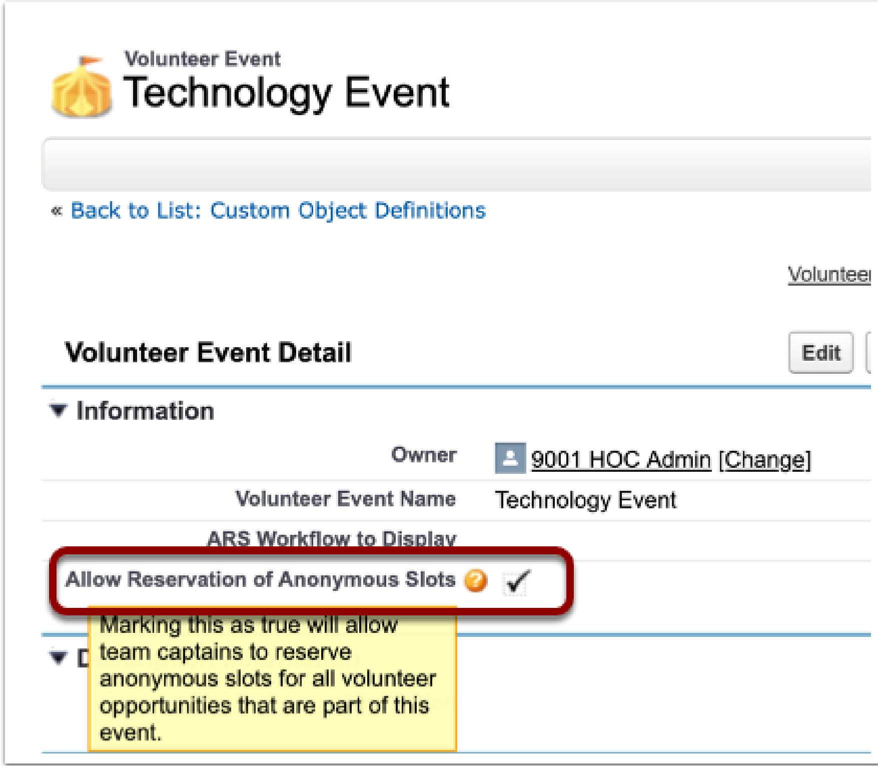
Indicate any event, volunteer opportunity, or occurrence, where you wish to allow team captains to reserve anonymous slots

There is a new field that your administrator can add to the Volunteer Event, Volunteer Opportunity, and/or Occurrence page layout.   (See this article for instructions on adding this field). The new field is called "Allow Reservation of Anonymous Slots".

When checked as true in a Volunteer Event, All Volunteer Opportunities and their occurrences will allow team captains to reserve anonymous slots when signing up their team.

When checked as true in a Volunteer Opportunity, all occurrences of that opportunity will allow team captains to reserve anonymous slots when signing up their team.

When checked true in an occurrence -- that occurrence of the opportunity will allow team captains to reserve anonymous slots when signing up their team.



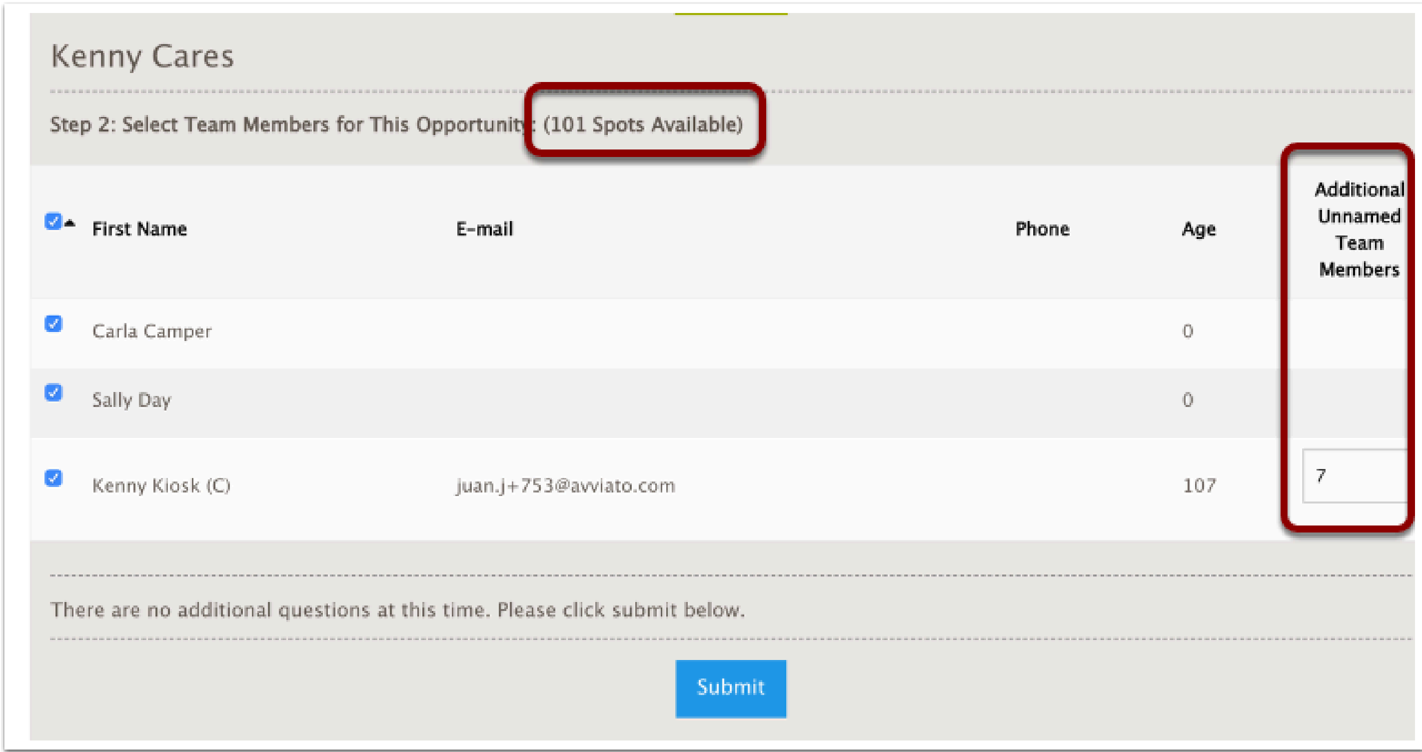
It is available in all three objects so that you can quickly determine how granularly you wish to deploy this option. If, for example, you turn it on at the volunteer opportunity level, you do not need to set this value for each individual occurrence. The Volunteer Opportunity setting will influence all the occurrences associated with that opportunity, even though the value of the field in the individual occurrences will not be changed.

What a team captain sees when signing up their team, with this setting 'on'

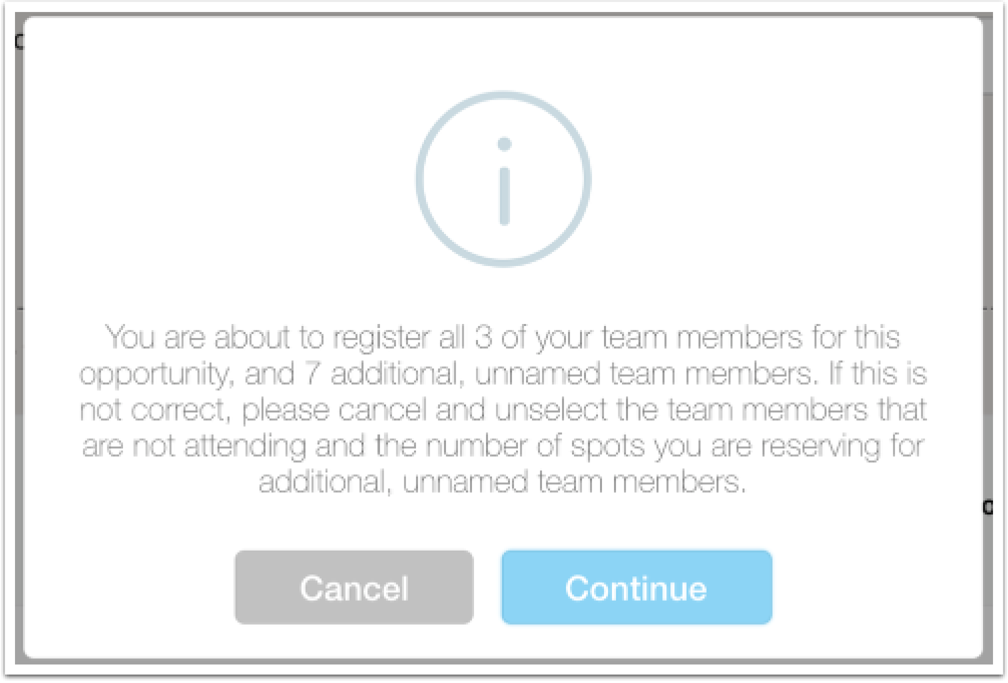
When a team captain creates a team, they can list themselves (as team captain), and if they know any other team members, they can enter them as well. They can also choose to create a team, and only add themselves as team captain.

In this example, Kenny Kiosk has formed a team "Kenny Cares". Right now he only knows two team members, Carla and Sally, but he plans to have a team of 10 members eventually, and wishes to reserve an additional 7 slots for team members he doesn't have the names for yet.

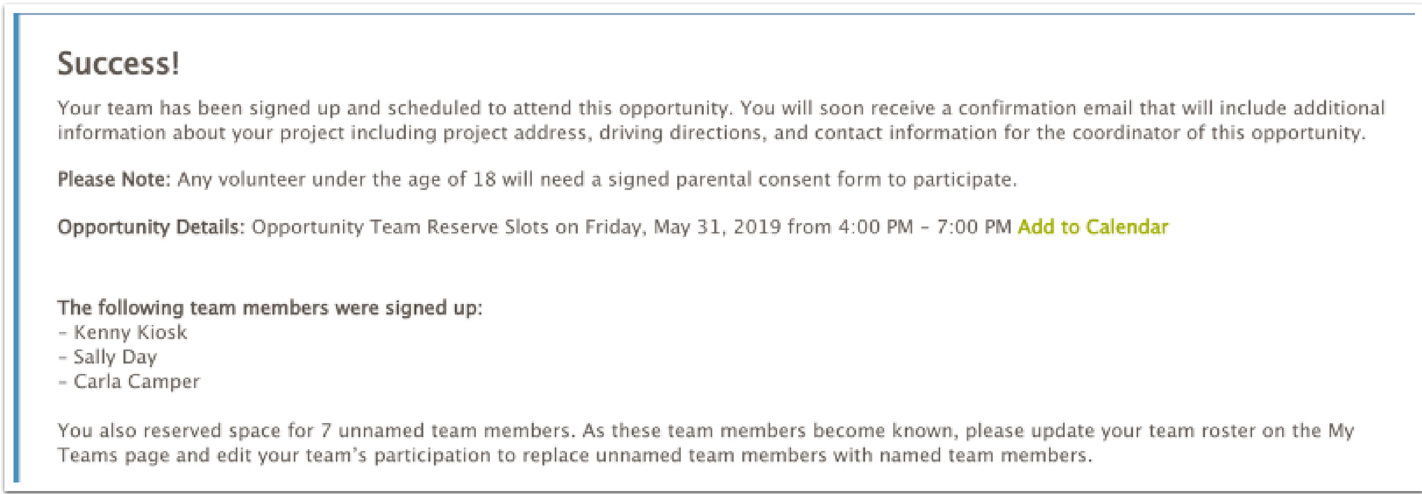
During team signup, he signs up Carla and Sally and himself -- but now sees a spot to enter "Additional Unnamed Team Members". And he sets that to 7. This will reserve 10 of the available slots for this opportunity. (He can see how many spots are available so that he won't accidently reserve more space than is available. (If he tried to sign up more spaces than are available - he'll receive an error message and be able to correct the number of slots he's reserving.



When he clicks submit, he's asked to confirm and given a message about how many slots he's reserving:



When he clicks continue -- the success message will reflect what he's done, and display any messages regarding any named team members who did not meet the requirements for the opportunity:



Note: When allowing a captain to reserve anonymous slots, no restrictions are applied to the 'guest' volunteers as no info is known about them at this time. If and when the captain replaces the anonymous slots with named team members, restrictions will be applied to the named team members. Anonymous team members will remain anonymous and not have restrictions or screening of any kind applied. So enable this feature only when you are comfortable with team captains honoring any restrictions associated with the opportunity.

On the back end, where are the anonymous volunteers tracked?

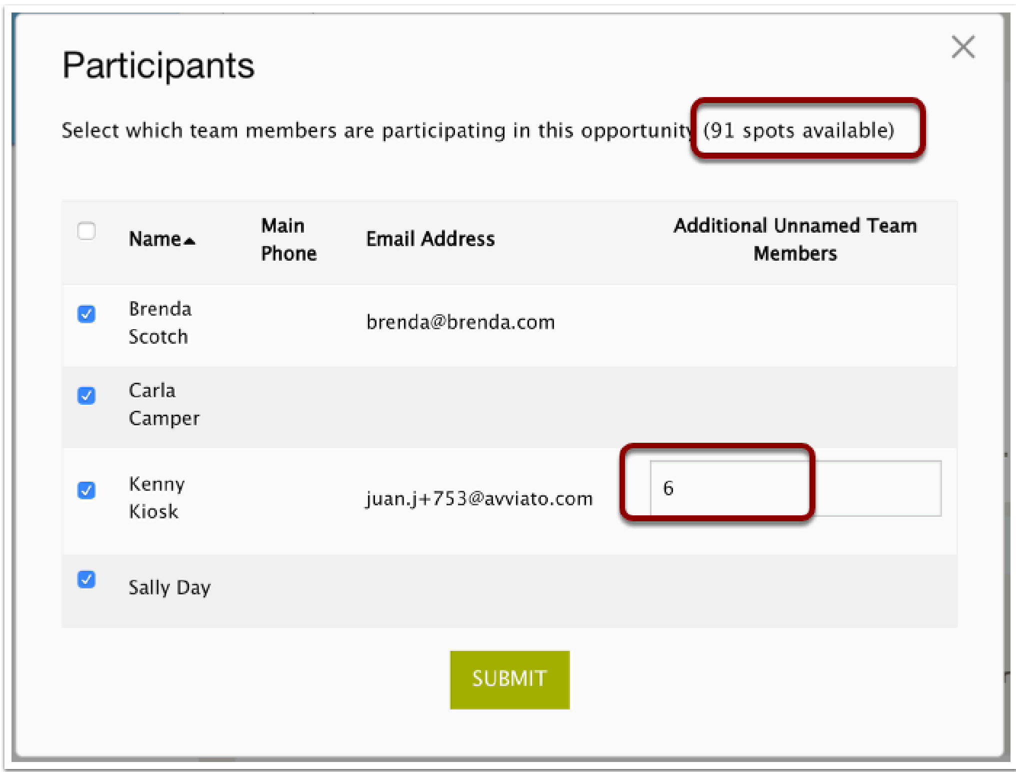
When this feature is enabled, the connection of the team captain has the 'guest volunteers' incremented to reflect the number of unnamed team members the captain has reserved slots for. The number of available slots for the opportunity will be decremented by the number of actual connections PLUS the guest volunteers slots reserved in this manner.

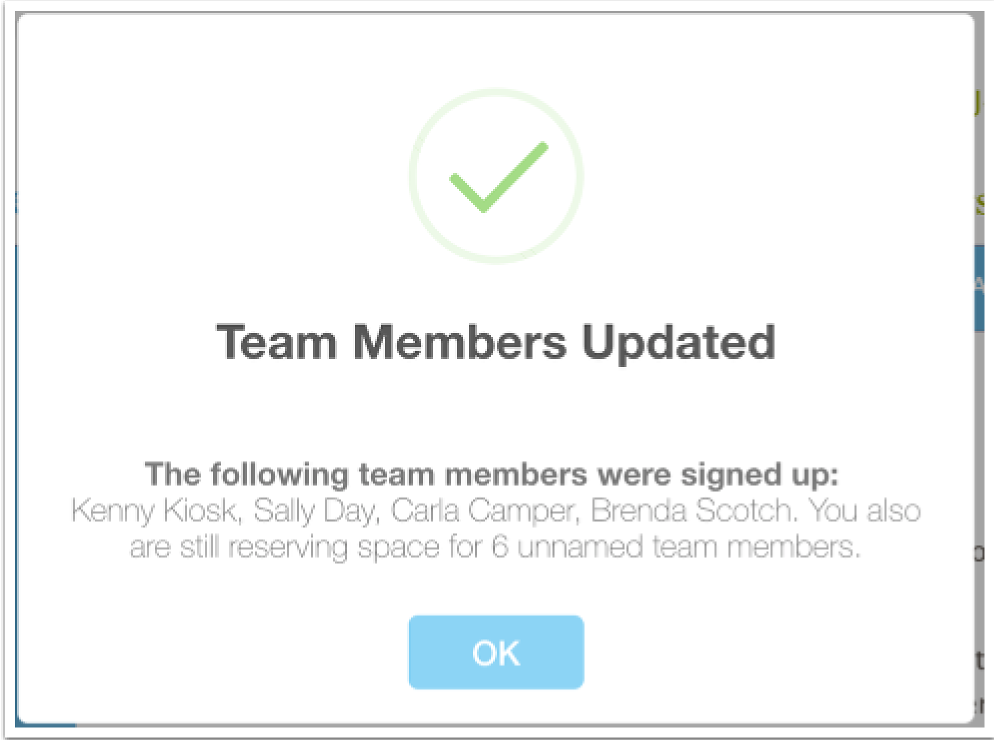
How does a captain edit the number of guest slots they are holding?

After signing up the team. The captain can, as always, add additional team members to their team. (by going to My Account / My Teams / Manage Teams / Add New Members). After adding new team members (perhaps naming some of the anonymous team members), they can then click on the "Participants" link and edit the number of anonymous slots being held.

For example, Kenny now goes to 'manage team' and adds a new team member, Brenda Scotch. He then clicks on the participants link to update his participating team members.

As before, he can add additional team members to the opportunity (space allowing), and/or remove team members. But now he can also edit the number of anonymous slots he's holding. So in this case he adds Brenda and lowers his 'unnamed team members' from 7 to 6.





IN this way - Kenny can update the number of 'reserved spaces for unnamed team members' at any time up until the opportunity takes place.

When the opportunity takes place, the person checking in volunteers can note how many of the unnamed team members actually attended, and update the 'guest volunteer' count in the captain's connection.

[See this article for information on how system administrators can add these new fields if you want to start using this feature.]()

[See this article for information on how unnamed team members are handled IF you are using the check-in kiosk to check in teams.]()