Team Feature – Non-profit Organization (Meals On Wheels)

Tutorial

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Creating Teams

Team accounts can only be created on the organization's public site. Team captains register their teams online and manage their accounts by logging into their Team Dashboard/Account.

Adding Team Members

As the organization, you can add Members to the Teams registered in your database. One place where you can add Members is on the Team's profile. On the 'Team Members' section, click on the 'Add Team Member' button.

It will open the 'Add Team Member' pop up where you must enter the member's name. If that member is already in your database, it will display the matching record on the dropdown. Otherwise, the system will require you to add the new member in the database first.

Members successfully added are listed on the 'Team Members' section of the Team Profile.

Other places where members can be added to the team are on the Scheduling and Attendance screens, which will be shown later.

Assigning the Team to an Opportunity

Before you can assign a team to an opportunity, make sure that the team is registered in your database. On your Opportunity list, click the plus (+) sign of the opportunity to assign team. A pop up will come up where you'll have to enter the team name on the field. It will pull up the matching record which you can select. Lastly, click on 'Assign Volunteer'.

Another place where you can assign a team to an opportunity is on the Team Profile. Click on the 'Opportunity List' tab, and then click on the opportunity list dropdown to select the opportunity. Enter the Team Size then hit the 'Assign' button.

Team Misty
Team Type: General Team

PIN - B000004361

| Team Captain Details: **Misty Dawn** | Email: **acassie102+misty@gmai...** |
| Team Co-Captain Details: **NA** | |

Summary		Trainings		
4 Hours Logged		Training	Date	Attended Dates
1 Opportunities Worked/Scheduled			No records found.	
0 Opportunities Waiting Approval				
0 Unread Message				

Opportunity Calendar	**Opportunity List**	-- Select Opportunity to Assign -- ▼	Team Size	**Assign**	⤢
➕ Opportunity	Verified Hours	Unverifi		Form	

-- Select Opportunity to Assign --
Dinner
Meal Delivery
Meals On Wheels
MealsonWheels_2017
MOW_Beta
MOW_Migrate

← BACK

Scheduling the Team from Team Profile

A team can be scheduled on the 'Manage Volunteers' page of the opportunity.

Manage Volunteers							
Attendance	Manage Volunteers : Meal Delivery						**Edit Opportunity**
Notification	🔍	Spring Valley United Me...▼	Select Shift ▼	All ▼	From Date 📅	To Date 📅	**Filter** **Reset**
	☑ Action ▼	Apply					
							8 Record(s) Found
	Name	Next Step	Hours Volunteered	Unverified Hours			
	▾ Team Misty	Scheduling ←	0	0			Remove Team ▾
	Application Type : Team (5)	✉ acassie102+misty@gmail.com					

Scheduling can also be done on the Team's profile.

Once you click on the 'Scheduling' link, it will open the Scheduling window. This is where you select the Venue, Route, Shift and Position for the team. At the bottom is where you can select the date/s that the team is volunteering. You can either manually choose available dates or schedule by 'Day of Week' (e.g. Every Monday). Hit Save.

There will be times that the schedule date/s selected have already reached its required number of volunteers. This will now prompt a window showing the only available schedules/routes where the team can be scheduled. You can either continue to schedule for all available routes or just to selected routes.

Scheduling the Team Members

After scheduling the team, you can now schedule its members. In order to do that, you must select 'Edit/View Schedule' of the scheduled opportunity.

This will open the 'View Schedule' window with the team's schedule. Click on the dropdown then select 'Team Member Schedule'.

Again, it will open the Scheduling window for you to schedule the member. You'll only need to select the Volunteer's Name and the Route/s. As for the date/s, you can only schedule the member for date/s within the Team's schedule.

After you have saved, the Team Member's schedule will be displayed below the Team schedule.

Scheduling Team from Open Routes

It is also possible to schedule teams from the 'Open Routes' page. Just filter the list and enter the name of the team on the 'Assign To' field of the route/schedule. It will display a dropdown of the matching team record.

Select that record and don't forget to hit Save. The route/schedule is then successfully assigned to the team.

Scheduling Team/Member from Attendance Page

Just like on the 'Open Routes' page, it is also possible to schedule the team on the Attendance page. You only have to enter the name on the Team field and select the record. The selected route/schedule will then be assigned to the team.

Logging Hours for the Team/Member

You are now ready to take the attendance of the team and its members in real time. On the Attendance page, click the Team Name to open the Attendance pop up.

On the pop up, it will display the Date, Route Number and Team Name. If a member has been scheduled under this team schedule, it will also display that volunteer's name for check in. But since we just assigned this team on the Attendance screen, no member has been assigned to this schedule yet.

You can enter the name of the member on the field to assign.

Attendance - 2/21/2017

Routes: 705A

Team Misty [Change] ⊘ CHECK IN ▾   [Add Member Schedule]

Route Number	Name
705A	Brock
	Brock Max

[Close]

On the other hand, you can also assign it to a non-member. It will pull up any matching volunteer record in your database or you can also create a new volunteer record on this screen. Once you select that volunteer, it will automatically add that volunteer to the team.

Attendance - 2/21/2017

Routes: 705A

Team Misty [Change] ⊘ CHECK IN ▾   [Add Member Schedule]

Route Number	Name
705A	Emma Stone
	Emma Stone
	_____

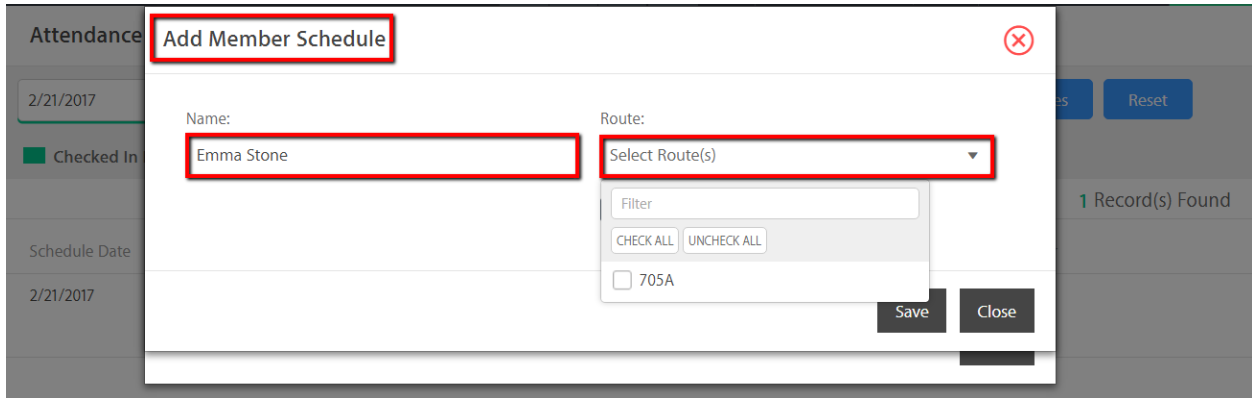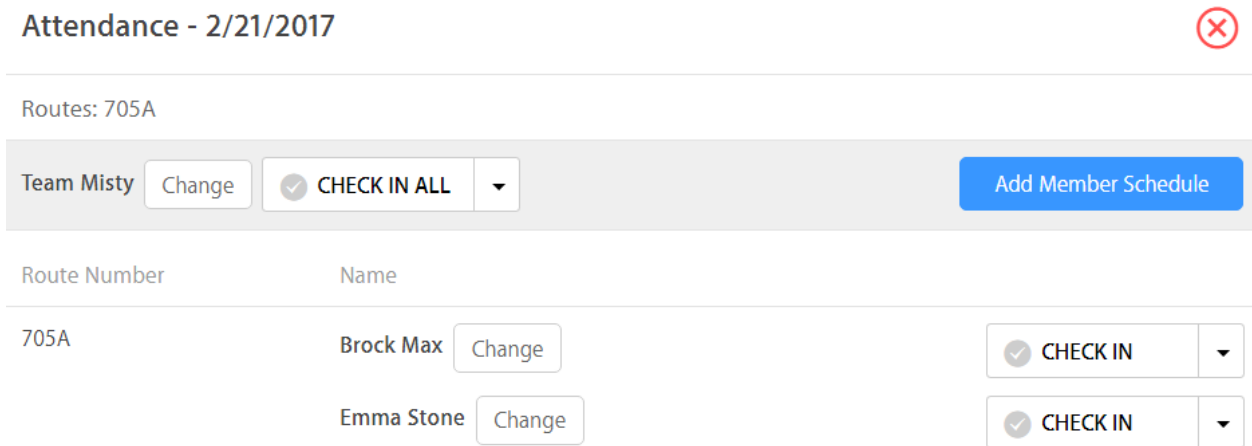[Close]

If more members showed up on that day, you will also be able to add those members by clicking on the 'Add Member Schedule' button on that pop up. Just enter the name of the volunteer (member/non-member) and select the route/s to assign.

After saving, it will now display the additional member on the Attendance Check in pop up.

To check in both of the volunteers, you just have to click on the 'Check in All' button. The route will then change colors from blue to green.
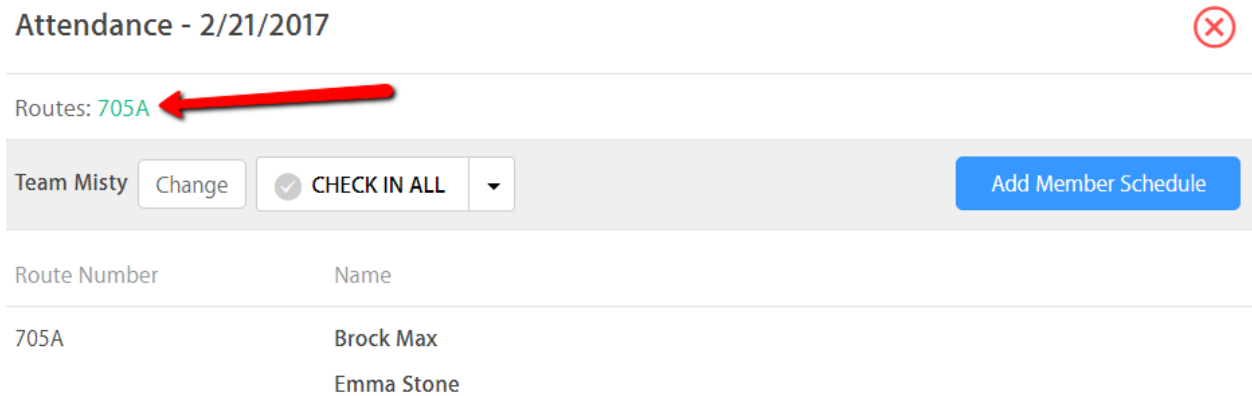
You will also see the color change on the Attendance page. If you have tagged them as 'No Show', then the routes will turn red (No Show), instead of green.

2/21/2017 → 705A → Team Misty ▾
(**Location**: Spring Valley United Methodist Church)

The checked in hours are then reflected on the Team schedule,

View Schedule ⊗

3 Record(s) Found

Spring Valley United Methodist Church (705A)	Default Shift	Driver	4	0	Edit ▾

Occurs on selected dates [View Dates]

➖ **Team Members**

Name	Hours Volunteered	Unverified Hours	
Brock Max (705A)	2	0	Edit ▾

Occurs on selected dates [View Dates]

| Emma Stone (705A) | 2 | 0 | Edit ▾ |

Occurs on selected dates [View Dates]

Team profile,

Team Misty
Team Type: General Team

PIN - B000004361

Team Captain Details: **Misty Dawn** | Email: ▮▮▮ ▮▮ ▮▮▮
Team Co-Captain Details: **NA**

Summary

4	Hours Logged
1	Opportunities Worked/Scheduled
0	Opportunities Waiting Approval
0	Unread Message

Trainings

Training	Date	Attended Dates
	No records found.	

as well as on the Member's profiles.

Brock Max
PIN: B000004362 | None

SCHEDULE VACATION

Send Email: **No** | Joining Date: **2/20/2017**
Associated Team(s): **Team Misty**

Summary

2	Hours Logged
1	Opportunities Worked/Scheduled
0	Opportunities Waiting Approval
0	Hours Pending For Approval

Trainings

Training	Date	Attended Dates
	No records found.	

Opportunity Calendar	**Opportunity List**	-- Select Opportunity to Assign --	Assign

Opportunity	Verified Hours	Unverified Hours	Next Step	Form	
Meal Delivery	2	0	Team Member	Form	Edit/View Schedule