Delegation at Operations

SETUP ACTIONS (DO THESE FIRST)

Overview

Update the General Contact Information
◦ This is how to set up the system to show who to contact about the operation

Add SMMS users for the Operation
◦ Set up the system for others you permit to see and change the operation data in SMMS
  ◦ The "Primary Contact" and "Display as Contact" boxes will be grayed until the user agrees to share contact information.

Agree to share your Contact Information
◦ How a user agrees to share their contact information in SMMS so it will show on the SMW opportunity postings
  ◦ This step is required to have contact information displayed on the Senior Missionary Website.

Update the General Contact Information

Open SMMS or return to the Dashboard page.

On the Menu at the top of the page, click on "Operations" to see a list of your operations.

Click on the "Operation ID" to open the operation's detail page.

If the General Contact information on the far right (under Operation Contact Preview) is not correct, click on "Edit Operation".

Enter the correct contact information in all 3 fields and click "Save".

< Operations

Albuquerque NM Family Services

Operation Details | User Management

Operation ID
03-9609706032

Supported Service Methods
(Physical) (Virtual)

Supported Service Types
(Senior Service) (Service) (Long-term Volunteer)

Supported Opportunity Types
(Service Missionary) (Family Services Support)
(Addiction Recovery Support)

Associated Church Unit
Albuquerque New Mexico North Stake

Service Missionary Area
New Mexico Albuquerque Service Missionary Area

Senior Service Missionary Group
NASW Area Albuquerque Senior Service Missionary Group

Address
4400 Presidential Pl NE Ste C
Albuquerque, New Mexico 87107 3442
United States

Department
Welfare Self Reliance Department

Auto Opportunity Generation
No

Operation Contact Preview

Albuquerque NM Family
Services

General Contact
Main Contact Name
Main Phone
ABQNMFS@pretendo.org

Often shows as
General Contact:
tbd
tbd
tbd

**Scroll all the way down
to find the Edit button**

✎ Edit Operation

**Scroll all the way down
to find these boxes**

General Operation Contact Info ⓘ

Name

Phone

Email

Save   Cancel

General Operation Contact Info ⓘ

Name

Albuquerque Family Services Front Desk

Phone

505-867-5309

Email

ABQ-NM-FS@pretendo.org

Save   Cancel

< Operations

Albuquerque NM Family Services

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Supported Service Methods
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Associated Church Unit
Albuquerque New Mexico North Stake

Service Missionary Area
New Mexico Albuquerque Service Missionary Area

Senior Service Missionary Group
NASW Area Albuquerque Senior Service Missionary Group

Operation Contact Preview

Albuquerque NM Family Services

General Contact
Albuquerque NM Family Services Front Desk
505 867 5309
ABQNMFS@pretendo.org

Add SMMS Users for the Operation

Open SMMS or return to the Dashboard page.

On the Menu at the top of the page, click on "Operations" to see a list of your operations.

Click on the "Operation ID" to open the operation's detail page.

Click on the "User Management" tab.

To add a user, enter their Church Account Username and choose a role.
- Support role is view only.
- Operation Delegated Approver role allows person to view and approve tasks on behalf of the Operation Manager.

Click on "Add User Responsibility"

To remove a user, click on the trash can icon to the right of their name and click "Yes, Remove Responsibility" to confirm the action.

Only visible to Operation Manager

You can have more than one Operation Manager

< Operations

Albuquerque NM Family Services

| Operation Details | **User Management** |

Calling | **Role**

Service Mission Leader | [▼] | ☐ Receive Email Notifications

Senior Missionary Coordinator | [▼] | ☐ Receive Email Notifications

Users

Primary Contact	Name	Role	
☐ Primary Contact	John Bonham (jbdrums)	Operation Manager	☐ Display as contact ❗

Add User Responsibility

Church Account Username (case sensitive)

[🔍]

Role ⓘ

[▼]

[+ Add User Responsibility]

No one is checked initially

You can only have one Primary Contact

You can have more than one contact displayed

The Primary Contact will always be displayed as contact

Albuquerque NM Family Services

Operation Details	**User Management**

Calling — **Role**

Service Mission Leader ▾ ☐ Receive Email Notifications

Senior Missionary Coordinator ▾ ☐ Receive Email Notifications

Users

Primary Contact	Name	Role	
☑ Primary Contact	John Bonham (jbdrums) 801-240-5555 bonzo@lz.com	Operation Manager	☑ Display as contact
☐ Primary Contact	J. Paul Jones (JPJMusic)	Operation Support	☐ Display as contact ❗ 🗑

Add User Responsibility

Church Account Username (case sensitive)

[🔍]

Role ⓘ

▾

+ Add User Responsibility

There is no trash can by Operation Manager. They must be removed by Salt Lake.

The check boxes are initially greyed out
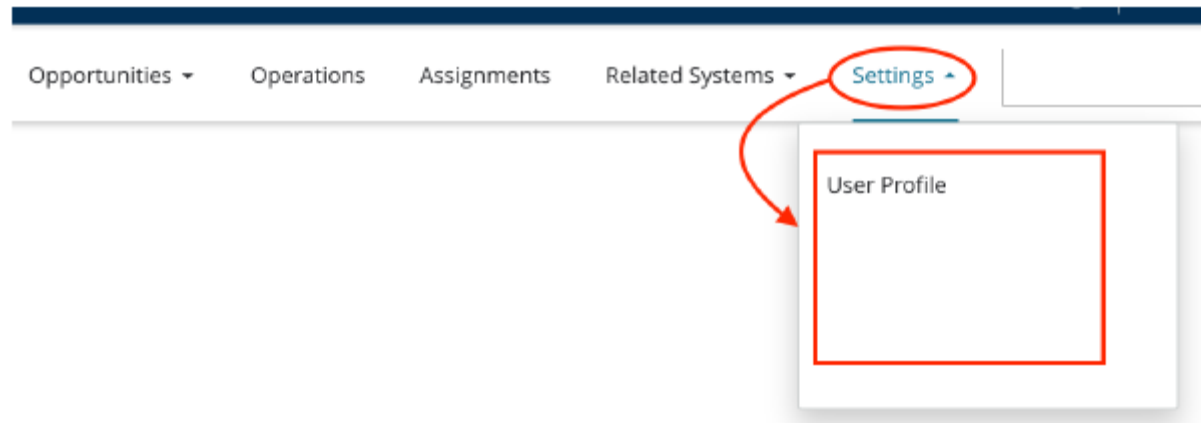
Selecting the trash can will delete the user

Agree to share your Contact Information

Open SMMS or return to the Dashboard page.

On the Menu at the top of the page, click on "Settings", then click on "User Profile".

Fill out the Display Name, Phone, and Email boxes and click "Agree".

User Profile only shows after they have been entered as a person with access

First name and last initial indicates they have not filled out and agreed to this yet

User Profile

Hammond A.

SMO Admin
Headquarters

Support Adviser
North America Central Area

Display Name

Phone

Email

User Agreement

By sharing your contact data and selecting Agree, you are granting permission for the Service Missionary Management System and related sites (Senior Missionary Opportunity Website) to display your contact information in relation to any opportunity or operation where you have a responsibility defined in the Service Missionary Management System. Storing your information and giving approval makes it possible for an operation to include your information as a contact in relation to the operation and opportunities.

You may return to the site at any time to modify your contact information or revoke this permission. Any data shared will be stored in accordance with the most current privacy notice referenced in the footer of this website. If you have an account in the system that is restricted due to local or regional laws, you may not be able to share contact information or give approval for its display.

Agree   ⊘ Disagree, Clear My Info

Delegation at Operations Summary

First thing you train them on
- Operation Details not showing correctly
- Opportunity website not showing a contact or not showing correct contact

Three steps to do it
- General Contact Information
- Adding Users
- Agree to share Contact Information

Can be done on a Phone

Can be done simultaneously

Then train them on Approval, Early Release, Extensions, and List of Missionaries