



# SERVICEREEF TEAM MANAGEMENT

2025

*Mission Team  
Leader Resource*



# *Table of Contents*

- 03 *Accessing Your Trip*
- 06 *Managing the Participants*
- 07 *Member Profiles*
- 10 *Message Sender (emails)*
- 13 *Meetings (scheduling them)*
- 14 *Tasks Grid*

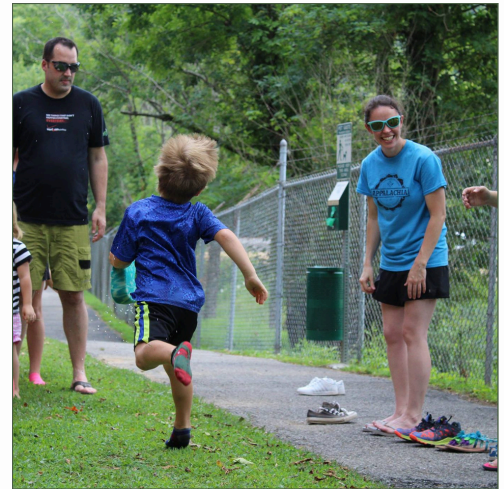
*This step by step guide is a quick, visual reference to help you manage your team within the ServiceReef platform and hopefully answer any questions you may have regarding navigating ServiceReef.*



# Managing Your Team in ServiceReef

Through the My Dashboard feature, you have the ability to do the following:

- View registrations and applications
- View incomplete registrations
- Track group and individual fundraising
- Send group and individual emails
- Schedule team meetings
- Schedule team retreat
- Keep track of task and task deadlines



**SE**  
SERVICE REEF

## Southeast Christian Missions

Connecting people to Jesus and one another.

**31** Looking Opportunities  
**214** With Opportunities  
**5.6k** Fundraising  
**41** Monthly Missions

[Make a Request](#)

### Recommended Opportunities

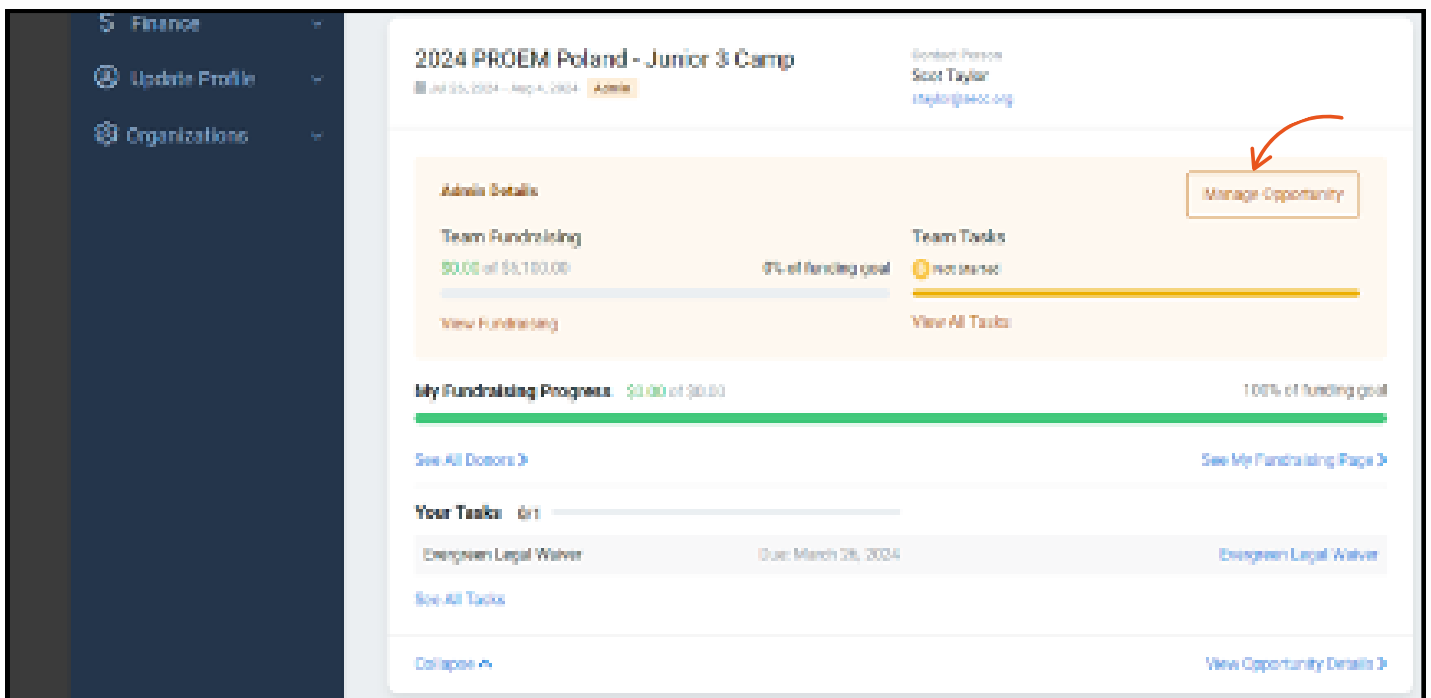
- 2025 Iron Coast Church Plant**  
Mar 13 - 14, 2025  
Bayanwick, WA  
\$1,250.00  
3 spots left  
South Lismore, Lismore (North Church), Service in a Box
- 2025 MSI Colombia**  
Mar 10 - 14, 2025  
\$2,000.00  
18 spots left  
Polonia M&B Miss International, Adults 18+ - 5,000
- 2025 Campo Amor Cuba - 920 MSM Spring Break**  
Mar 11 - Apr 5, 2025  
Havana, CU  
\$1,000.00  
8 spots left  
Monday - Friday, Campo Amor, High School (14-18)
- 2025 Crossroads Appalachia - 910 MSM Spring Break**  
Mar 11 - Apr 4, 2025  
Floyd County, KY  
\$1,000.00  
3 spots left  
Monday - Friday, Crossroads Appalachia, High School (14-18) - 3, None

# Accessing Your Trip Page

After logging in to ServiceReef, click on My Dashboard at the top of the screen (shown on previous page). A screen will pop up displaying trips you are connected with, whether as a leader or participant. Look for the Opportunity name (trip name) associated with the trip you are leading. Once found, click on the blue “Expand” hyperlink underneath the trip name.

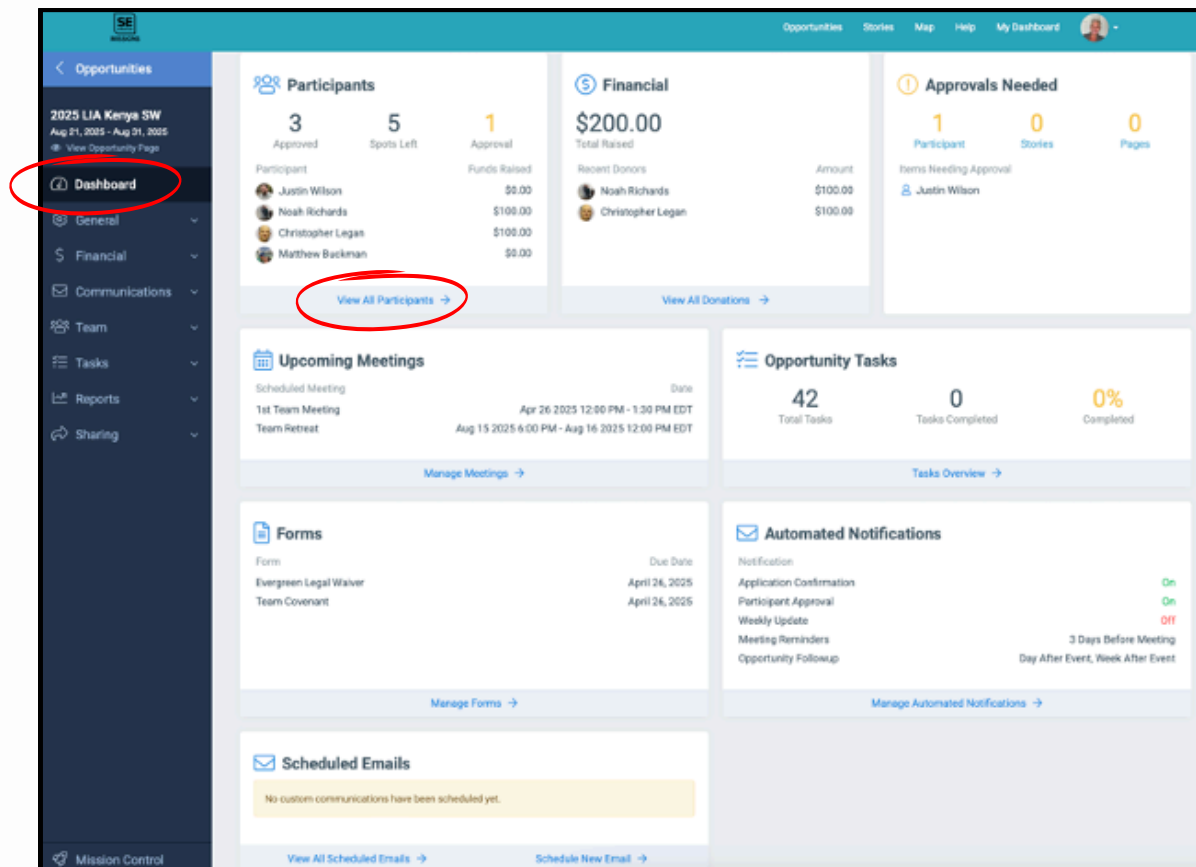


Once the screen expands, click on Manage Opportunity to the right of the screen. This will open the trip Opportunity Dashboard allowing you to see participants, outstanding approvals in queue, money the team has raised, upcoming meetings, and outstanding tasks.



# Managing the Participants

From the Opportunity Dashboard (below), you manage applicants and participants by clicking the “View All Participants” hyper link under the Participants box.



A Participant dashboard will display. From here you can see anyone who has been approved for the trip, those who are pending approval, individuals who have been declined, and incomplete applications.

**Awaiting Approval** - an individual has applied but not been approved. Status is yellow.

**Approved** - you have reviewed the application and advised Missions Logistics you approve the applicant. Status is green.

**Denied** - a registrant is not approved. Status is red.

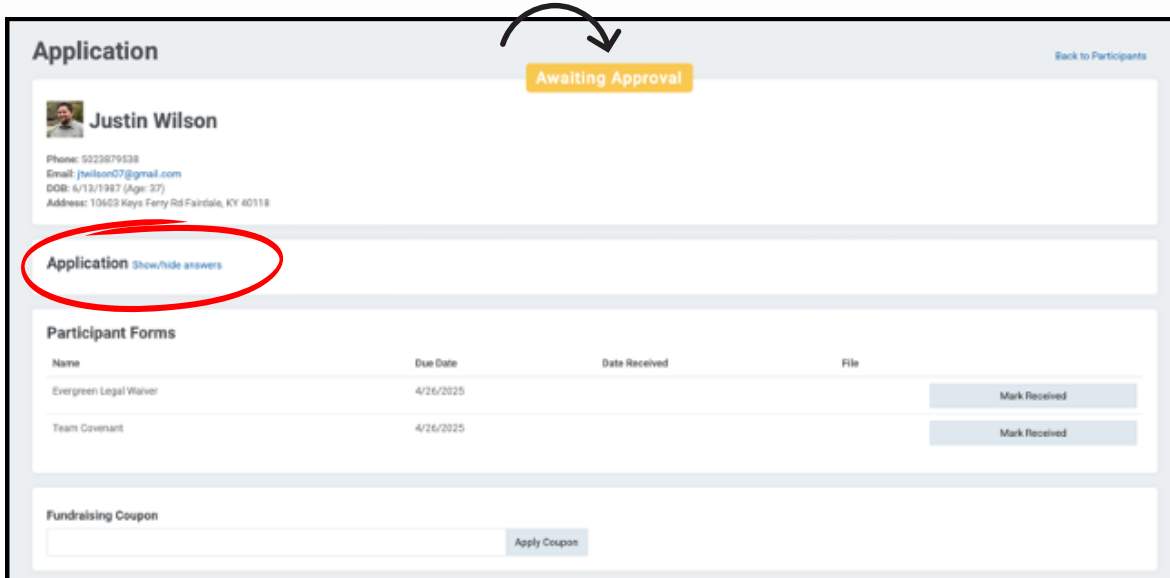
**Incomplete** - the potential participant has either clicked on Register for a trip and decided not to move forward or has started the application but not finished it. Status is blue.

The screenshot shows the Participants dashboard with a search bar and a table of participants. The table has columns for Member, Progress, Amount Raised, Balance, Tasks, Forms, Registered On, Status, Order Number, and Actions. The Status column is circled in red, showing 'Pending Approval' for Justin Wilson and 'Approved' for Matthew Buckman, Christopher Legan, and Noah Richards.

Member	Progress	Amount Raised	Balance	Tasks	Forms	Registered On	Status	Order Number	Actions
Justin Wilson	0%	\$0.00	\$4,523.00	0/11	0/2	2/18/2025	Pending Approval	300371436	Actions
Matthew Buckman	100%	\$0.00	\$0.00	0/11	0/2	1/21/2025	Approved	300359149	Actions
Christopher Legan	2%	\$100.00	\$4,423.00	0/9	0/2	1/29/2025	Approved	300362129	Actions
Noah Richards	2%	\$100.00	\$4,423.00	0/9	0/2	2/5/2025	Approved	300365714	Actions
Todd Odle	0%	\$0.00	\$4,523.00	0/11	0/2	1/29/2025	Cancelled	300362316	Actions


## Finding the Application

When there are individuals waiting on approval, you will review their application to ensure they are a good fit for the trip. To find their application, click on their name and an Application Dashboard for that individual will pop up. You will see the Awaiting Approval highlighted in yellow at the top of the page. Scroll to the Application section and select the blue hyperlink showing “Show/Hide Answers.”



**Application** Back to Participants

**Awaiting Approval**

 **Justin Wilson**

Phone: 5023879538  
Email: [jwilson07@gmail.com](mailto:jwilson07@gmail.com)  
DOB: 6/13/1987 (Age: 37)  
Address: 10603 Keys Ferry Rd Fairdale, KY 40118

**Application** [Show/Hide answers](#)

**Participant Forms**

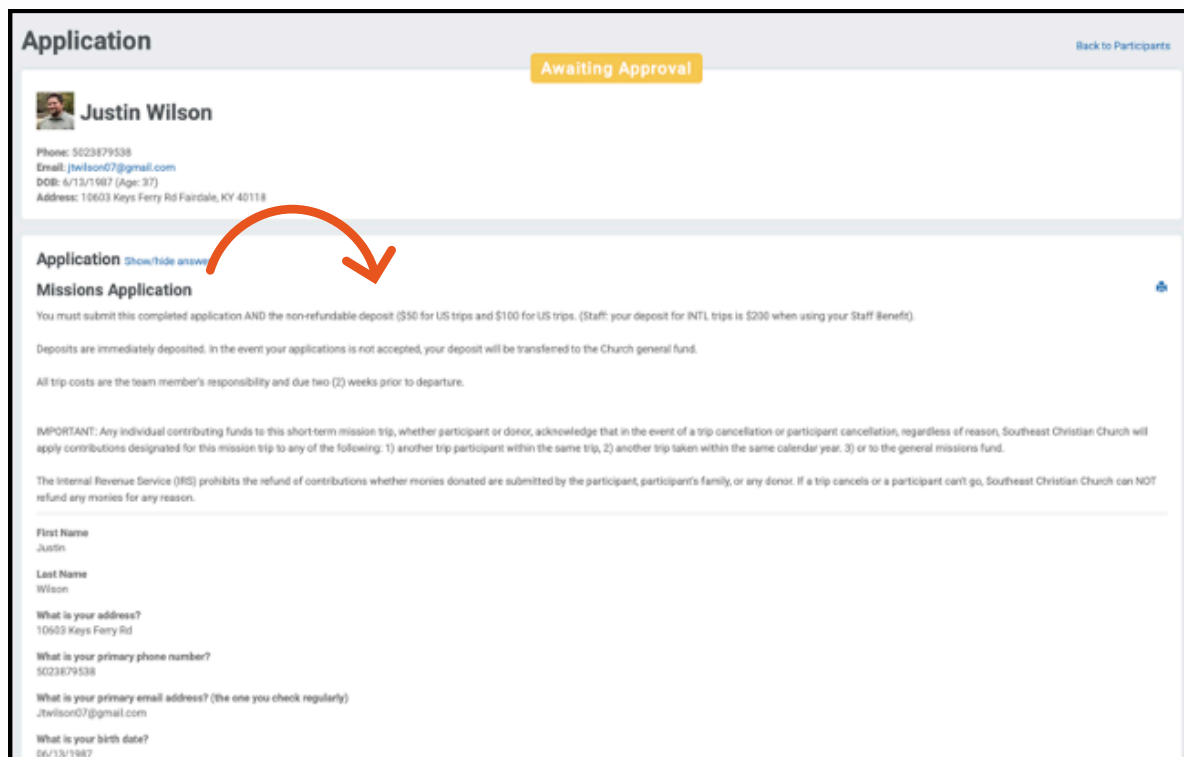
Name	Due Date	Date Received	File
Evergreen Legal Waiver	4/26/2025		<a href="#">Mark Received</a>
Team Covenant	4/26/2025		<a href="#">Mark Received</a>

**Fundraising Coupon**

[Apply Coupon](#)


## Viewing the Application

The mission application questions and answers will display. As you scroll down the application you will see questions specifically requesting information to help you discern if this person might fit your team. Always feel free to call or have coffee with them to get to know them if they are unfamiliar to you. Once you make the determination on the individual, reach out to short-term missions and advise you approve or decline the individual. If approved, their status will move to green. If declined, the status moves to red. The system will automatically send an email advising the applicant of their status.



**Application** Back to Participants

**Awaiting Approval**

 **Justin Wilson**

Phone: 5023879538  
Email: [jwilson07@gmail.com](mailto:jwilson07@gmail.com)  
DOB: 6/13/1987 (Age: 37)  
Address: 10603 Keys Ferry Rd Fairdale, KY 40118

**Application** [Show/Hide answers](#)

**Missions Application** +

You must submit this completed application AND the non-refundable deposit (\$50 for US trips and \$100 for INTL trips. (Staff: your deposit for INTL trips is \$200 when using your Staff Benefit).

Deposits are immediately deposited. In the event your applications is not accepted, your deposit will be transferred to the Church general fund.

All trip costs are the team member's responsibility and due two (2) weeks prior to departure.

**IMPORTANT:** Any individual contributing funds to this short term mission trip, whether participant or donor, acknowledge that in the event of a trip cancellation or participant cancellation, regardless of reason, Southeast Christian Church will apply contributions designated for this mission trip to any of the following: 1) another trip participant within the same trip, 2) another trip taken within the same calendar year, 3) or to the general missions fund.

The Internal Revenue Service (IRS) prohibits the refund of contributions whether monies donated are submitted by the participant, participant's family, or any donor. If a trip cancels or a participant can't go, Southeast Christian Church can NOT refund any monies for any reason.

**First Name**  
Justin

**Last Name**  
Wilson

**What is your address?**  
10603 Keys Ferry Rd

**What is your primary phone number?**  
5023879538

**What is your primary email address? (the one you check regularly)**  
[jwilson07@gmail.com](mailto:jwilson07@gmail.com)

**What is your birth date?**  
06/13/1987

## Participant Dashboard

From the Participant Dashboard, you can see the percentage of funds raised for each person (a huge help as the half funds deadline approaches), how much money each has raised, how much they have left to fundraise, how many tasks have been completed, their application status, and an “Actions” button. You can use the Actions button to send emails to individual participants.

Member	Progress	Amount Raised	Balance	Tasks	Forms	Registered On	Status	Order Number	Actions
Shelby Ingle	85%	\$1,800.00	\$808.00	3/8	0/7	1/12/2025	Approved	30035840	Actions
Sydney Byrd	30%	\$798.08	\$1,480.00	5/9	0/7	1/13/2025	Approved	300350715	Actions
Derek Clark	95%	\$0.00	\$1,080.00	6/24	0/7	1/12/2025	Approved	300356377	Actions
Dylan Clark	74%	\$1,555.00	\$545.00	6/9	0/7	1/12/2025	Approved	300355635	Actions
Leif Clark	65%	\$458.08	\$1,350.00	7/9	0/7	1/12/2025	Approved	300355685	Actions
Liyana Clark	71%	\$1,505.00	\$595.00	7/9	0/7	1/12/2025	Approved	300355687	Actions
Nawab-Darigan	100%	\$198.08	\$-100.00	6/8	0/7	1/13/2025	Approved	300356805	Actions
Janae Guthrie	99%	\$1,030.00	\$778.00	7/9	0/7	1/12/2025	Approved	300355860	Actions
Damon Hemper	62%	\$1,100.00	\$1,080.00	6/9	0/7	1/11/2025	Approved	300355034	Actions
Christopher Hedding	0%	\$0.00	\$1,050.00	6/8	0/7	3/11/2025	Approved	300356839	Actions
Olivia Hedding	127%	\$2,550.00	\$-400.00	6/9	0/7	1/13/2025	Approved	300350790	Actions
Lillian Huhler	88%	\$1,800.00	\$338.00	7/9	0/7	1/11/2025	Approved	300350207	Actions
Rayen O'Reilly	71%	\$1,495.00	\$405.00	1/9	0/7	1/14/2025	Approved	300355081	Actions
Rick Rauer	100%	\$0.00	\$0.00	6/8	0/7	1/13/2025	Approved	300356006	Actions
Kaitlyn Riley	54%	\$1,150.00	\$958.00	7/9	0/7	1/5/2025	Approved	300354932	Actions
Megan Wheel	100%	\$198.08	\$-100.00	6/8	0/7	1/13/2025	Approved	300356418	Actions
Hudson Retzke	0%	\$0.00	\$2,180.00	0/7	1/13/2025	1/13/2025	Declined	300355212	Actions
Brady White	0%	\$0.00	\$2,180.00	0/7	1/13/2025	1/13/2025	Declined	300356206	Actions

## Getting Back to the Opportunity Dashboard

To get back to the trip dashboard, look to the navigation tool on the left and click on Dashboard. This directs you to the trip specific dashboard.

The Opportunity Dashboard provides a comprehensive overview of the current opportunity. The navigation menu on the left includes: Opportunities, Dashboard (circled in red), General, Financial, Communications, Team, Tasks, Reports, and Sharing. The main dashboard area is divided into several key sections:

- Participants:** Shows 3 Approved, 5 Spots Left, and 1 Approval. Lists participants: Justin Wilson (\$0.00), Noah Richards (\$100.00), Christopher Legan (\$100.00), and Matthew Beckman (\$0.00).
- Financial:** Shows a Total Raised of \$200.00. Lists recent donors: Noah Richards (\$100.00) and Christopher Legan (\$100.00).
- Approvals Needed:** Shows 1 Participant, 0 Stories, and 0 Pages needing approval. Lists Justin Wilson.
- Upcoming Meetings:** Lists the 1st Team Meeting (Apr 26 2025 12:00 PM - 1:30 PM EDT) and Team Retreat (Aug 15 2025 6:00 PM - Aug 16 2025 12:00 PM EDT).
- Opportunity Tasks:** Shows 42 Total Tasks, 0 Tasks Completed, and 0% Completed.
- Forms:** Lists Evergreen Legal Waiver (Due April 26, 2025) and Team Covenant (Due April 26, 2025).
- Automated Notifications:** Lists various notifications like Application Confirmation (On), Participant Approval (On), Weekly Update (Off), Meeting Reminders (3 Days Before Meeting), and Opportunity Followup (Day After Event, Week After Event).
- Scheduled Emails:** A message states "No custom communications have been scheduled yet."

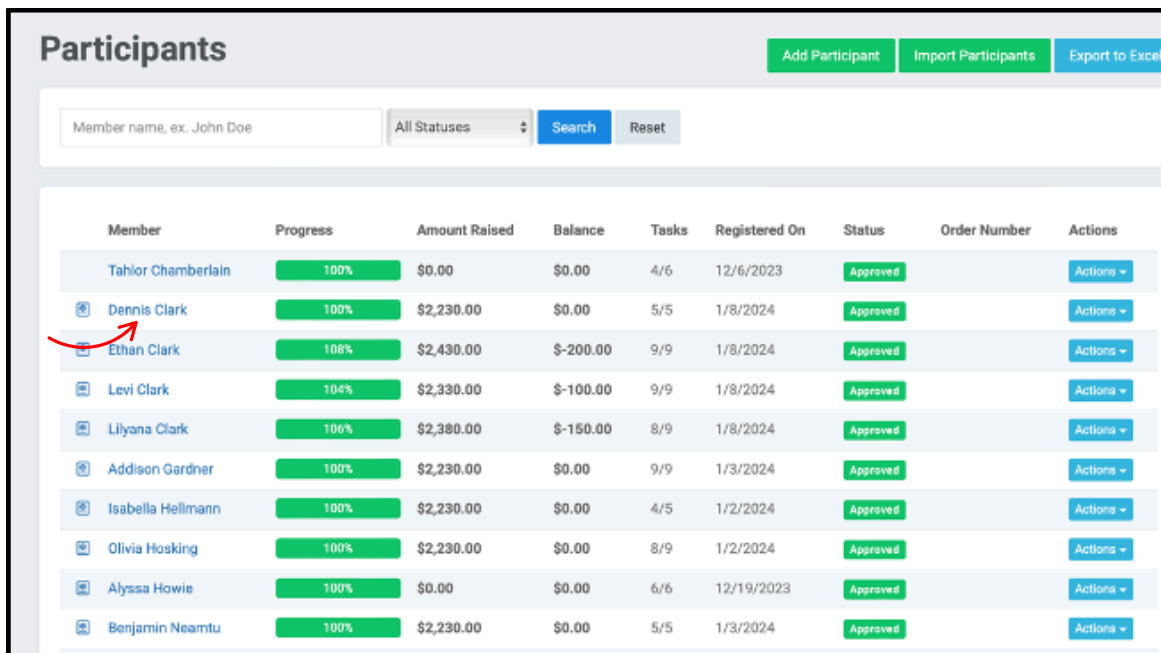
# Member Profiles

As a team leader, you have temporary access to your team's Member profiles. This allows you to make notes and upload forms if the team members are encountering difficulties. The following screen shots will provide step-by-step instruction on how to access these items.

From the Opportunity Dashboard, access the Participant Dashboard. From this screen, you may send individual emails to team members via the Action button. Note: these emails are NOT saved in the ServiceReef platform but you can copy and paste them in the Notes section..

In order to access the profiles, your logistics liaison will need to add you as a Coach. Once this is done, you will have access to add notes, upload forms, etc. At the conclusion of the trip, logistics will remove you as a Coach.

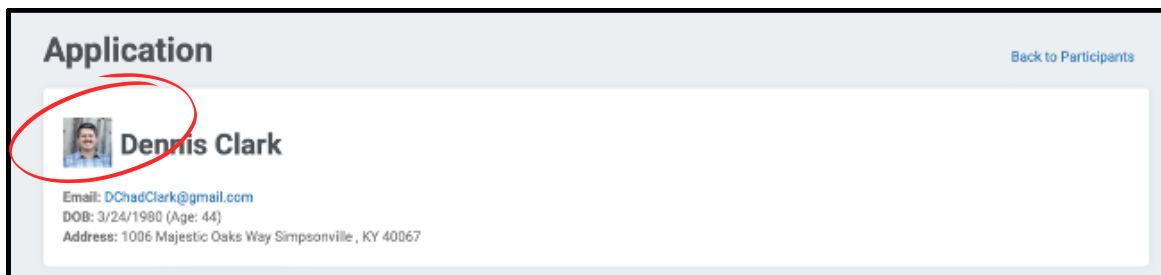
Click the name of the participant whose profile you are accessing. This will pull up their Application Dashboard.



The screenshot shows the 'Participants' dashboard with a search bar and a table of members. The table columns are Member, Progress, Amount Raised, Balance, Tasks, Registered On, Status, Order Number, and Actions. A red arrow points to the profile of Ethan Clark.

Member	Progress	Amount Raised	Balance	Tasks	Registered On	Status	Order Number	Actions
Taylor Chamberlain	100%	\$0.00	\$0.00	4/6	12/6/2023	Approved		Actions
Dennis Clark	100%	\$2,230.00	\$0.00	5/5	1/8/2024	Approved		Actions
Ethan Clark	106%	\$2,430.00	\$-200.00	9/9	1/8/2024	Approved		Actions
Levi Clark	104%	\$2,330.00	\$-100.00	9/9	1/8/2024	Approved		Actions
Liyana Clark	106%	\$2,380.00	\$-150.00	8/9	1/8/2024	Approved		Actions
Addison Gardner	100%	\$2,230.00	\$0.00	9/9	1/3/2024	Approved		Actions
Isabella Hellmann	100%	\$2,230.00	\$0.00	4/5	1/2/2024	Approved		Actions
Olivia Hosking	100%	\$2,230.00	\$0.00	8/9	1/2/2024	Approved		Actions
Alyssa Howie	100%	\$0.00	\$0.00	6/6	12/19/2023	Approved		Actions
Benjamin Neamtu	100%	\$2,230.00	\$0.00	5/5	1/3/2024	Approved		Actions

From here, click on the image/avatar next to their name. This will pull up the member modal.



The screenshot shows the 'Application' modal for Dennis Clark. The profile picture is circled in red. The modal includes the name 'Dennis Clark', email 'DChadClark@gmail.com', DOB '3/24/1980 (Age: 44)', and address '1006 Majestic Oaks Way Simpsonville, KY 40067'. A 'Back to Participants' link is visible in the top right corner.

This is an example of a Member Profile. If someone has a passport which may be expiring, it will appear in red under the person's name. This will help you know who needs to renew. In addition, ServiceReef will send them emails advising how soon the passport will expire.

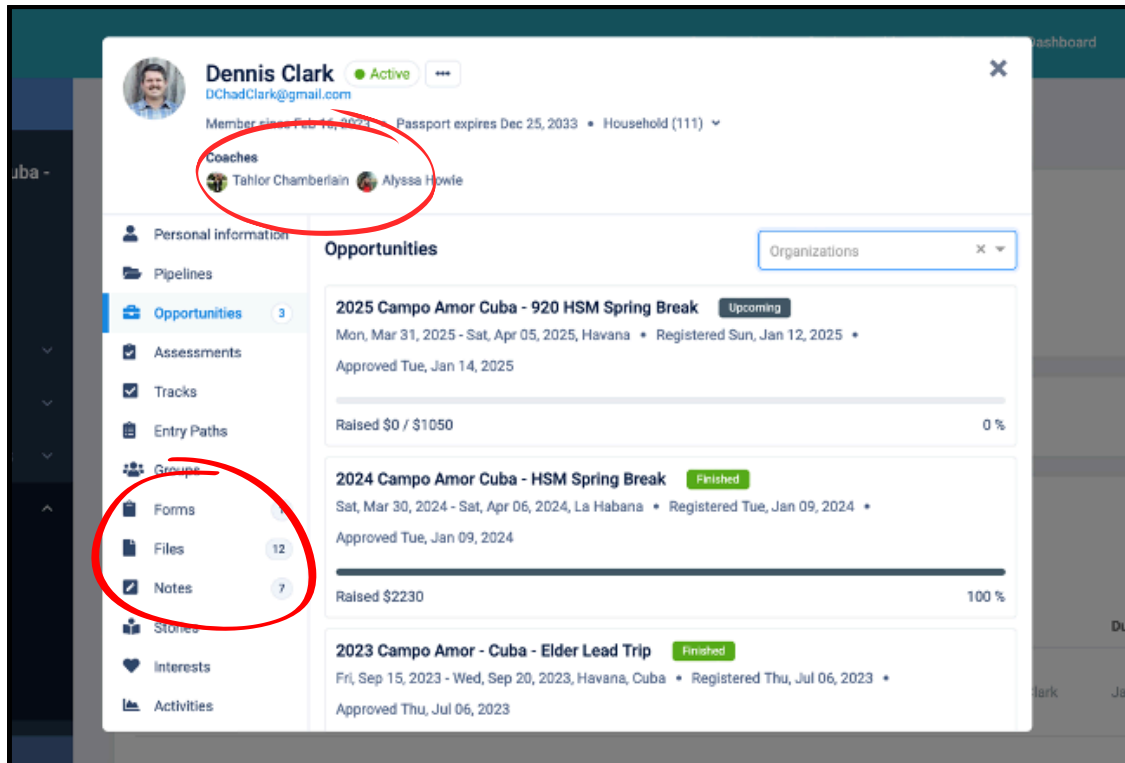
The items in the modal you will find useful are as follows.

**Coaches:** these are the team leader(s)

**Forms:** this is the trip application.

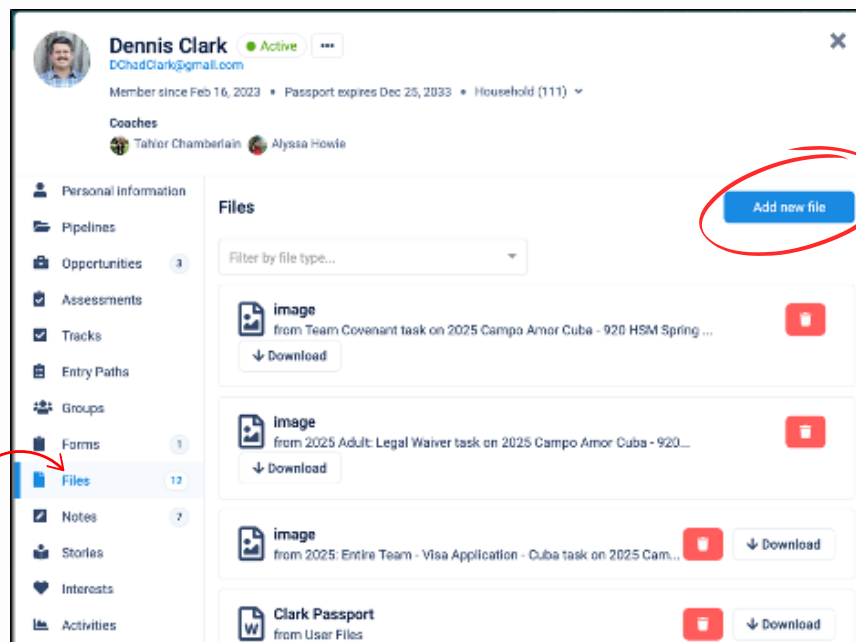
**Files:** all forms the team member as uploaded for all trips they are been part of.

**Notes:** where you can see any notes logistics has made or where you can add notes.



## Files

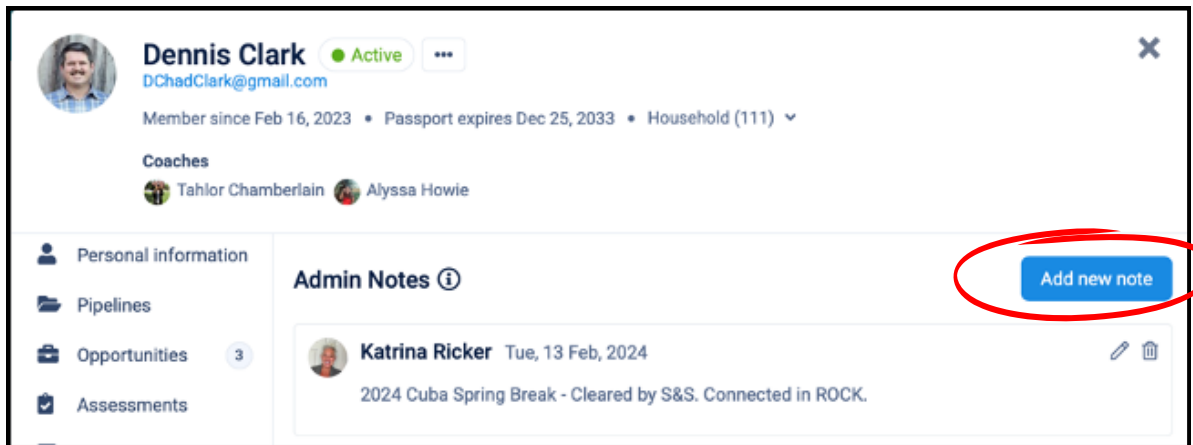
This section shows every form the participant has uploaded for any trip where they have served. As a team leader, you have the ability to upload files for them if they are having troubles. You can also download files if needed when on-field (with access to wi-fi).



## Notes

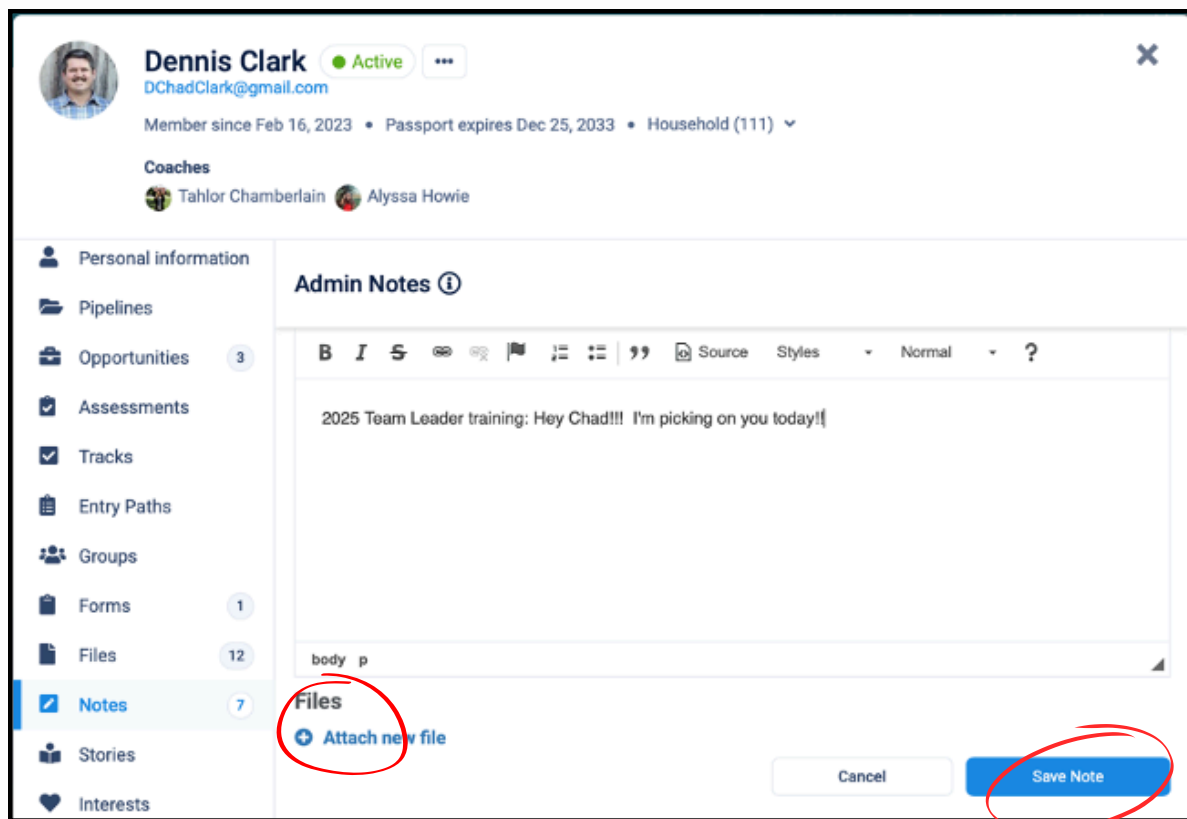
Within notes, you can see if logistics has sent a Volunteer Application, a MinistrySafe link, if they have submitted a participant for trip clearance through Safety & Security, or any additional information they have posted. You may enter any notes or communications you deem pertinent.

***This is a great place to make note of someone you see who might be a potential leader!***



The screenshot shows the profile of Dennis Clark, who is active. The 'Admin Notes' section is highlighted, and a red circle is drawn around the 'Add new note' button. A note from Katrina Ricker is visible, dated Tue, 13 Feb, 2024, with the text '2024 Cuba Spring Break - Cleared by S&S. Connected in ROCK.'

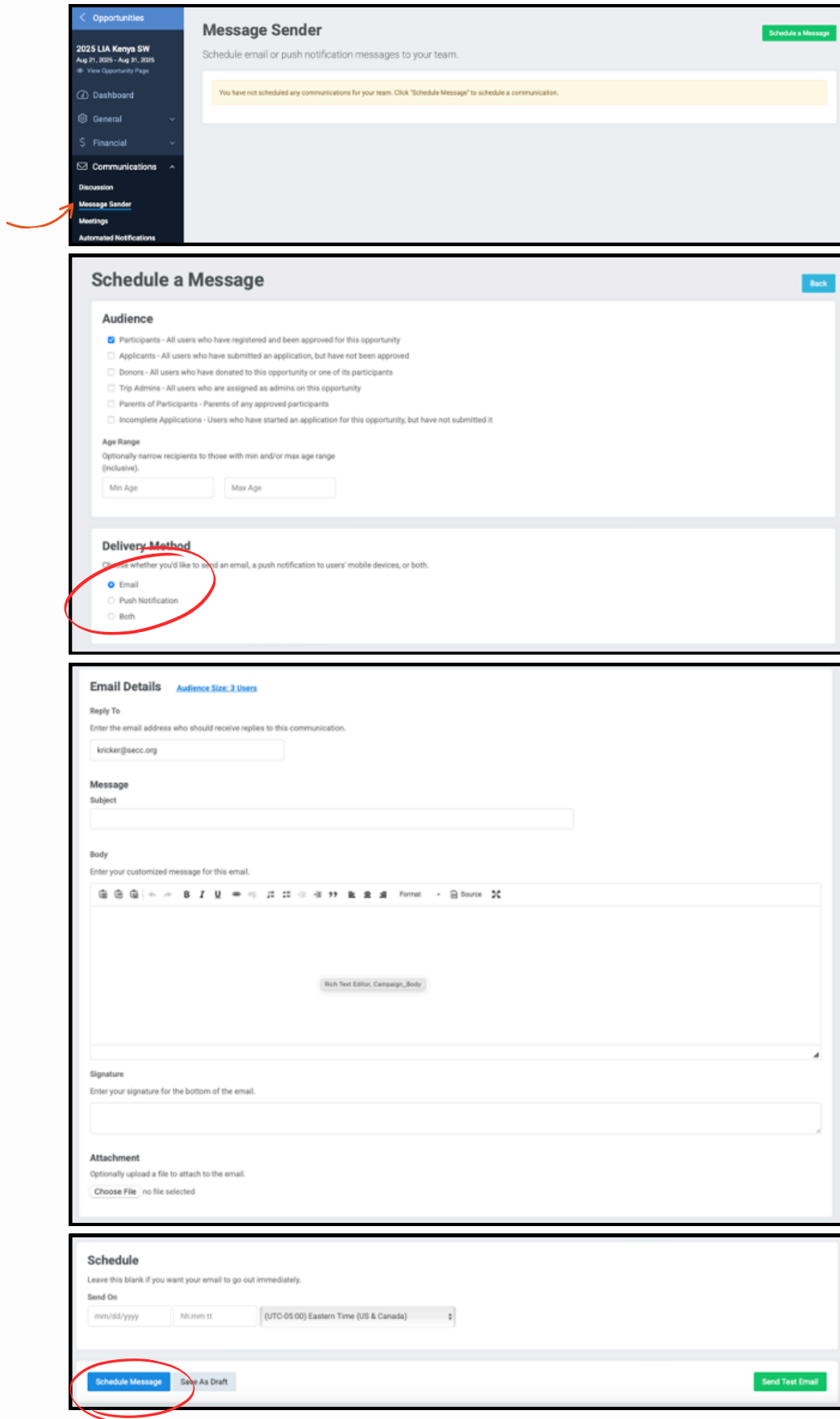
To make a note, click Add New Note and the Admin Notes box will display. Simply type in the year and trip name - very handy if someone goes on multiple trips - and your note. You may also attach a file if needed. Save the note and the system will time and date stamp it.



The screenshot shows the 'Admin Notes' section expanded into a text editor. The text '2025 Team Leader training: Hey Chad!!! I'm picking on you today!!' is entered. A red circle is drawn around the 'Attach new file' button in the bottom left corner, and another red circle is drawn around the 'Save Note' button in the bottom right corner.

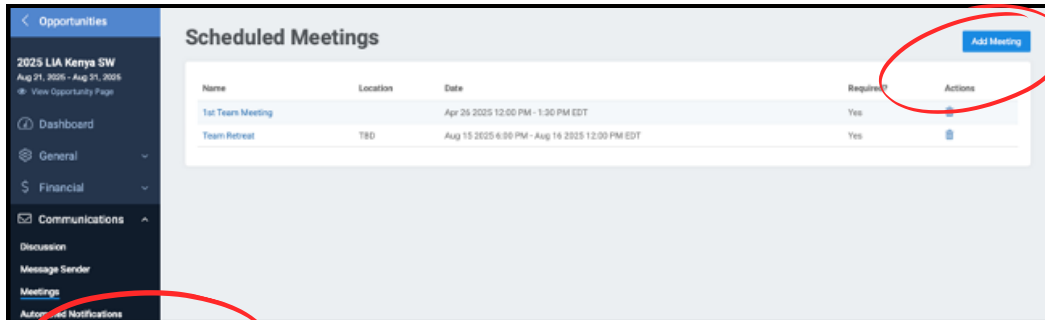
# Message Sender



From the Message Sender feature you have the ability to send emails, texts, or both to your entire team. You can also schedule emails to go out every week with fun facts about the city/country, what to pack, interesting details about the partner you will be visiting or general information.

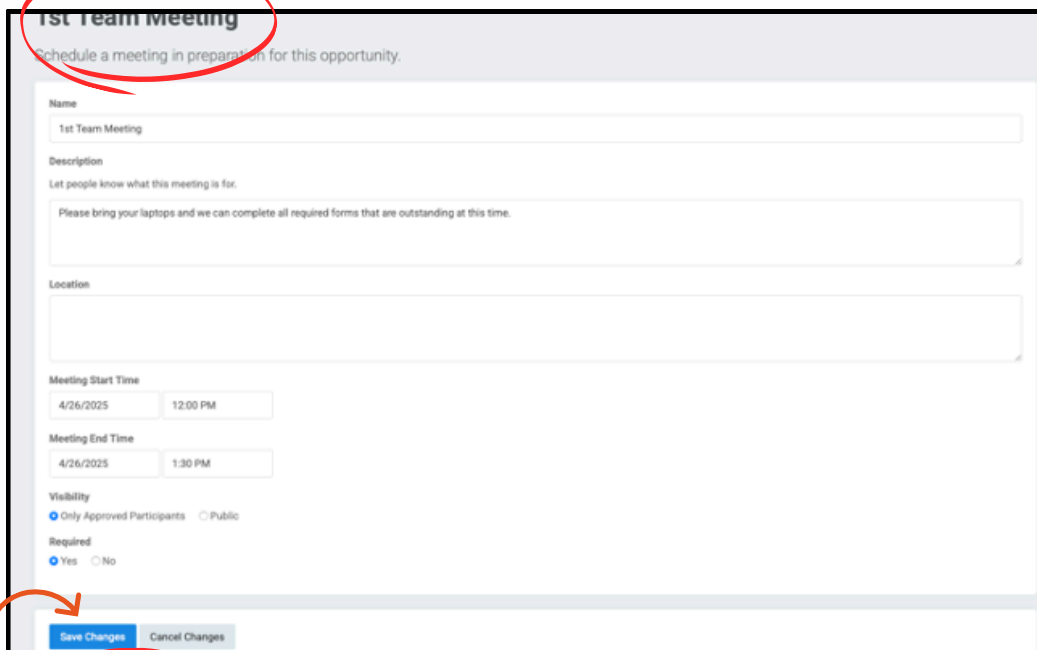


# Meetings

From the navigation tool, click Communications and select Meetings from the drop down menu. You can schedule your first team meeting, or meetings, from here as well as your team retreat. The information will populate on the dashboard of each person on your team.



Name	Location	Date	Required	Actions
1st Team Meeting		Apr 26 2025 12:00 PM - 1:30 PM EDT	Yes	
Team Retreat	TBD	Aug 15 2025 6:00 PM - Aug 16 2025 12:00 PM EDT	Yes	



**1st Team Meeting**

Schedule a meeting in preparation for this opportunity.

Name  
1st Team Meeting

Description  
Let people know what this meeting is for.  
Please bring your laptops and we can complete all required forms that are outstanding at this time.

Location

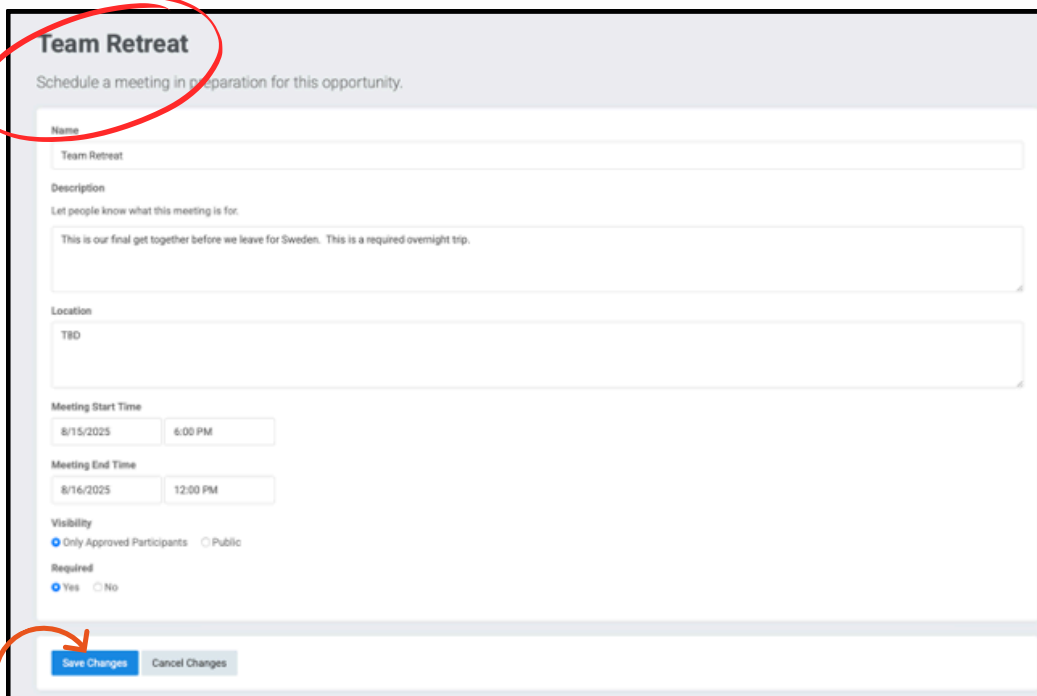
Meeting Start Time  
4/26/2025 12:00 PM

Meeting End Time  
4/26/2025 1:30 PM

Visibility  
 Only Approved Participants  Public

Required  
 Yes  No

[Save Changes](#) [Cancel Changes](#)



**Team Retreat**

Schedule a meeting in preparation for this opportunity.

Name  
Team Retreat

Description  
Let people know what this meeting is for.  
This is our final get together before we leave for Sweden. This is a required overnight trip.

Location  
TBD

Meeting Start Time  
8/15/2025 6:00 PM

Meeting End Time  
8/16/2025 12:00 PM

Visibility  
 Only Approved Participants  Public

Required  
 Yes  No

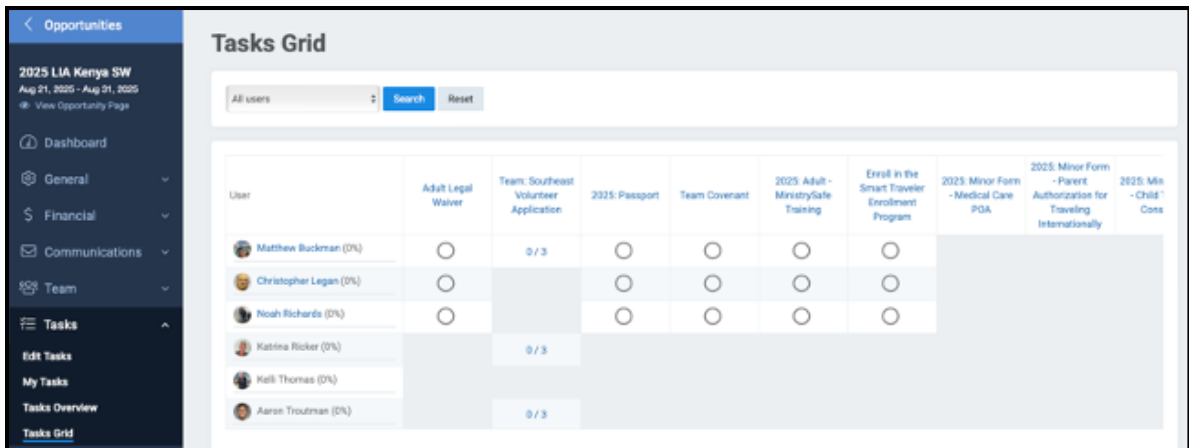
[Save Changes](#) [Cancel Changes](#)

# Tasks Grid

Everyone on a team has tasks they are required to complete. These may be forms, vaccinations, uploading a passport, etc. For the team members, all the tasks are displayed on their trip dashboard with a deadline and a place to upload any completed forms.

For you, the team leader, monitoring team progress through the use of the task grid is a breeze. It provides a quick snapshot of who has and has not completed their tasks.

To access the task grid, use the navigation bar, click on the Tasks drop down menu, and select the Task Grid link. Click on the link and the grid will display. As items are completed, the buttons will turn green.



The screenshot shows the 'Tasks Grid' interface. On the left is a navigation sidebar with options like 'Opportunities', 'Dashboard', 'General', 'Financial', 'Communications', 'Team', 'Tasks', 'Edit Tasks', 'My Tasks', 'Tasks Overview', and 'Tasks Grid'. The main area displays a table with columns for 'User', 'Adult Legal Waiver', 'Team: Southeast Volunteer Application', '2025: Passport', 'Team Covenant', '2025 Adult - MinistrySafe Training', 'Enroll in the Smart Traveler Enrollment Program', '2025: Minor Form - Medical Care PGA', '2025: Minor Form - Parent Authorization for Traveling Internationally', and '2025: Min - Child Cons'. The table lists six users with their completion percentages and progress indicators (circles) for each task.

User	Adult Legal Waiver	Team: Southeast Volunteer Application	2025: Passport	Team Covenant	2025 Adult - MinistrySafe Training	Enroll in the Smart Traveler Enrollment Program	2025: Minor Form - Medical Care PGA	2025: Minor Form - Parent Authorization for Traveling Internationally	2025: Min - Child Cons
Matthew Buckman (0%)	<input type="radio"/>	0/3	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>			
Christopher Legan (0%)	<input type="radio"/>		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>			
Noah Richards (0%)	<input type="radio"/>		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>			
Katrina Ricker (0%)		0/3							
Hali Thomas (0%)									
Aaron Troutman (0%)		0/3							



