Congregants' Guide: Getting Started

Update Your Profile

To update your photo:

1. Log into the site.
2. Click your name in the upper-right corner, and select **My Profile**.
3. Point to the image to the left of your name and click it.
4. Browse the image you want to use and select it.
5. You might need to refresh your profile page to see the change.

Update Contact Information

Your profile contains your contact information. This is what other members will use when they want to get in touch.

1. Log in to your site.
2. Click your name in the upper-right corner, and select **My Profile**.
3. Click **Edit Profile**.
4. On the **Contact Information** tab, enter or edit the fields displayed. See Additional Field Information below for details.
5. Note, especially, any fields marked with an asterisk. These must be completed before you can save.
6. Click **Save**.

Update Personal Information

Gender, birthday, marital status, and campus—your church needs to keep this information current for its records and to give you accurate reports, statements, and updates.

1. Log in to your site.
2. Click your name in the upper-right corner, and select **My Profile**.
3. Click **Edit Profile**.
4. On the **Personal Information** tab, complete or edit the fields displayed. Fields marked with an asterisk must be completed before you can save.
5. Click **Save**.
6. Your Age
   Feel free to enter your full birthday. The year and your age will **not** be displayed on your church profile.

Update Social Media Information

If you want, your profile can include links to your Twitter, Facebook, LinkedIn, and Instagram profiles. In which case, links to your social network pages will be added to your contact information. Others who have permission on those sites to view your page can click on one of these icons and do so.

Change Your Notification Settings

This is where you determine how often you will be notified when new information is posted to your groups. If you turn on the Daily Digest, you will receive an email each day with highlights from your church groups.

To specify your email notifications:

1. Log in to the site.
2. Click your name, then **Email Settings**.
3. For each of your groups, select which type of posting, if any, you wish to be notified of.

To enable the Daily Digest:

1. Log in to the site.
2. Click your name, then **Email Settings**.
3. Turn on the **Daily Digest**.

Set Your Privacy Preferences

By default, the viewing of your personal and contact information is limited to members of groups you are in, group leaders, and staff members. If you choose to, however, you can make your information visible to all registered users of your church's website.

1. Log into the site.
2. Click your name in the upper-right corner, and select **My Profile**.
3. On the **Info** tab, next to **Edit Profile,** click to the privacy icon 🔒 Privacy.
4. Select a family member (if more than one).
5. Click one of the buttons above the line to apply that setting to all information in the profile, or click **Custom Privacy** and select a setting for each field.
6. Click **Save**.

While you can hide the majority of your information from most of your church, you should know that, regardless of your settings, contact data will still be visible to certain members of your church staff.

A family member with a primary position such as "Head" or "Spouse" can also change privacy settings for other members of the family.

Find People on the Website

Find a friend!

1. Sign in using your email and password.
2. Click **Community > Directory**.
3. In the search box, select **People**, and enter the name of the person you want to find. You can enter both names, one name, or just part of one name. As you type, a list of possible matches is displayed.
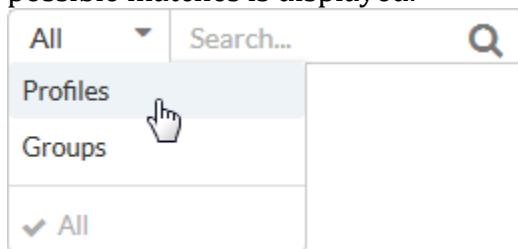
4. You can also click the filter button to limit the list of profiles to people/businesses or active/inactive profiles.

Get a Map

Click a member's home address to open a new tab that shows the address in Google Maps.

Can't Locate Someone?

Depending on a person's privacy setting choices, you may not be able to view his or her contact information.

View the Directory

The Directory is a list of individuals associated with your church. Some names might not include contact information. While everyone's name appears in the Directory, their contact information can be hidden by changing their privacy settings.

1. Log in to your site.
2. In the left side navigation menu, click **Directory**.

Group Communication

When communications are enabled for a group, group members can view the news for that group that includes member posts, photos and events.

When you sign in to any of the Connect mobile apps, you'll automatically sign in to your newsfeed, which displays the most recently active posts for all the groups you participate in. You can then filter the newsfeed to show posts just from a single group, or navigate to a specific group using the Groups menu.

News Content

To view a group's newsfeed:

1. Sign in to the site.
2. Click **Groups**. Staff members: click **Community** first.
3. To view news, click the name of the group.

To view the news for all of your groups combined, click **Community** > **News**.

To post to a group's newsfeed:

1. Sign in to the site.

2. To add a post, click .
3. Select the the group you want to post to.
4. Enter the post title and body text.
5. If you have an attachment, click **Attach files**.
6. Click **Post**.

To post a photo to a group's newsfeed:

1. Sign in to the site.
2. To add a photo, click .
3. Select the the group you want to post to.
4. Select the image you want to post.
5. Enter a caption below the image.
6. If you want to add another photo to the gallery, click **Add more photos**.
7. Click **Post**.

To comment on a post:

1. Sign in to the site.
2. On the post that you want to reply to, click .
3. Enter your comment and click **Reply**.

To show that you like or support a news item, click at the bottom of the post.

To edit a post:

1. Sign in to the site.
2. Click on a post that you have written.
3. Click and select **Edit**.
4. Make your changes and click **Post**.

To delete a post:

1. Sign in to the site.
2. Click on a post that you have written.
3. Click and select **Delete**.
4. Click **Delete**.

Some mobile devices have emoji that are specific to only that device and can't be seen on web or other devices. If you see a blank icon () in a post on the newsfeed, this means someone used one of the device-specific emoji.

Message People in Your Church

You can use Realm messaging to start conversations with other people in your church. If messaging is turned on for your group, a group also has a group-based channel where all members can hold a joint conversation.

You can also create private individual messages between yourself and others. When you start a new message, you choose whether to add just one person, or several people. If you start a message with just one person, you won't be able to add more people to the conversation later on.

Creating and Managing Messages

To start a new message:

1. Log into the site.
2. In the Community menu, click **Messages**.
3. To start a new message click ⊕.
4. In the **To** field, begin entering the name of the person you want to message.
5. Select the name from the drop-down menu. You can add more than one person to the conversation.
6. Enter your message in the **Type a message** field.
7. To add a file or image to the message, click 📎 and select the file.
8. To add an emoji to the message, click ☺ and select the emjoi.
9. Click **Send**.

- If you start a message with only one person, you won't be able to include additional people in the conversation later.
- If you start a message with multiple people, you can add new people to the conversation later.
- If you start a new message with the same recipients as a previous message, you will see the history of your old conversations.

To respond to a message:

1. Log into the site.
2. In the Community menu, click **Messages**.
3. Click the message in the Recent column. This displays the newest responses to the message.
4. Enter your message in the **Type a message** field.
5. To add a file or image to the message, click 📎 and select the file.
6. To add an emoji to the message, click ☺ and select the emjoi.
7. Click **Send**.

If you need to enter many responses quickly, you can select the **Press Enter key to send** option.

To add someone to a message:

1. Log into the site.
2. In the Community menu, click **Messages**.
3. Click the message in the Recent column.
4. Click ⋮ , then select Add People.
5. Begin entering the name of the person you want to add.
6. Select the name from the drop-down menu. You can add more than one person to the conversation.
7. Click **Add**.

You can only add more people to an existing conversation if you started the message with more than one person.

To leave a conversation:

1. Log into the site.
2. In the Community menu, click **Messages**.
3. Click the message in the Recent column.
4. Click ⋮ , then select **Leave Conversation**.
5. Click **Continue**.

If you leave the conversation, you will lose access to past messages and will not receive notifications about new activity.

Managing Message Notifications

To mute message notifications:

1. Log into the site.
2. In the Community menu, click **Messages**.
3. Click the message in the Recent column.
4. To mute notifications for the message, click 🔔 .
5. Choose a mute duration. You can select a certain time-frame, such as 1 hour, or mute the notification until you choose to turn it back on.
6. Click **Mute**.

1. Log into the site.
2. In the Community menu, click **Messages**.
3. Click the message in the Recent column.
4. To unmute notifications for the message, click 🔕.
5. Click **Unmute**.

When you create a new message, any recipient who uses the mobile app receives an app notification. Anyone who doesn't respond to the message also receives an email with all message activity for the first 5 minutes.

If you reply to a message, you will continue to receive notifications for new activity in that conversation. However, you can choose to mute discussions for a certain amount of time, or forever. You can also choose to leave a private discussion, which will completely remove the message history and prevent you from receiving new activity notifications.

If a message is no longer useful, you may choose to archive it. Archived messages are available under the Archived section. If you need to restore an archived message to the Recent section, all you have to do is type something new in the old message.

All messaging carries over real-time between Realm's web version and the mobile app, so you can check messages on the go!

Your Giving

You can check your giving history, pledges, or print a list of your past giving. If your church accepts online gifts through Realm, you can make a contribution or set up a recurring gift. If your church accepts online gifts through Realm, you can contribute once or set up a recurring gift.

Contributions - Online Gifts

To contribute from your profile page:

1. Sign into your site.
2. Click **Giving** on the main menu.
3. Click **+ Give**. If you don't see this button, contact your church office and ask them about online giving.
4. Enter the amount you want to give, then select the fund. If the fund has the memo field enabled, complete this field to add a note. To give to more than one fund at once, click **Give to an additional fund**.

5. Select a gift frequency and enter the appropriate date information.
6. Enter your payment information. If you have a saved payment method, you can use it or click **Add New Payment Method** to add another payment method.
7. Click **Give**.

What about months that have less than 31 days?

During months that have less than 31 days, recurring gifts scheduled for the 31st of each month will process on the last day of the month.

Will I be notified about recurring gifts?
Yes, if you set up a recurring online gift, you will receive an email when the end date has been reached.

To contribute as a member or attendee with a login:

1. Enter the link in a web browser or scan the QR code.
2. Enter your gift amount and select a fund unless these are pre-selected. If the fund has the memo field enabled, complete this field to add a note.
3. Enter your email address.
4. Click **Give**.
5. If the email address is one you've used to log in before, you can then enter your password, **Sign In**, and make your contribution from inside the site. Otherwise, click **Continue as Guest** (see below).
6. When finished, click **Give**.

To contribute as a guest:

1. Enter the link in a web browser or scan the QR code.
2. Enter your gift amount and select a fund unless these are preselected. If the fund has the memo field enabled, complete this field to add a note.
3. Enter your email address.
4. Click **Give**.
5. If the email address is not one you've used to log in before, you can now enter your account information and click **Give**.

To scan your credit card using an iOS device:

1. On your iOS device, enter the link in the Safari web browser.
2. Enter your gift amount and select a fund unless these are preselected. If the fund has the memo field enabled, complete this field to add a note.
3. Enter your email address.
4. Click **Give**.
5. When entering your account information, click **Scan Credit Card** on the keyboard screen.

6. On the camera screen, position your credit card inside the frame.
7. After the scan, the information pulled from the card will show up in all of the appropriate text boxes on the payment form.

Which browser do I use to access this feature?

You can only access this feature through the Safari browser on an iOS/Apple device. Using a QR code through an external app will not work with this feature. Also, this feature is not available on Android devices.

To give via text message:

1. Text your church's keyword and amount to **73256** on your smart phone.
2. Once the text is sent, you will receive a confirmation message.
3. Click the link in the confirmation message to access the payment form.
4. Complete the payment form and verify the amount and fund.
5. When finished, click **Give**.
6. You will receive a receipt by text and email.
7. Your payment information is saved for future gifts.

For future gifts via text message, submit your church's keyword again to 73256 to generate another payment form link.

Contributions - Other Processes

To view your giving history:

1. Sign into your site.
2. Click **Giving** on the main menu.
3. To narrow the list of contributions, click , select limiting criteria, and click **Filter**.

To view your future gifts:

1. Sign into your site.
2. Click **Giving** on the main menu.
3. Click **Scheduled**.
4. To narrow the list of contributions, click , select limiting criteria, and click **Filter**.

To print your giving statement:

1. Sign into your site.
2. Click **Giving** on the main menu.

3. If necessary, filter your list of contributions (see above).
4. Click ![printer icon] . Add a comment to the giving statement if necessary. The output is downloaded as a PDF file that can be opened from your browser.

To quickly print a copy of your giving statement:

During tax season, you can quickly print a copy of your giving statement by using the button shown:
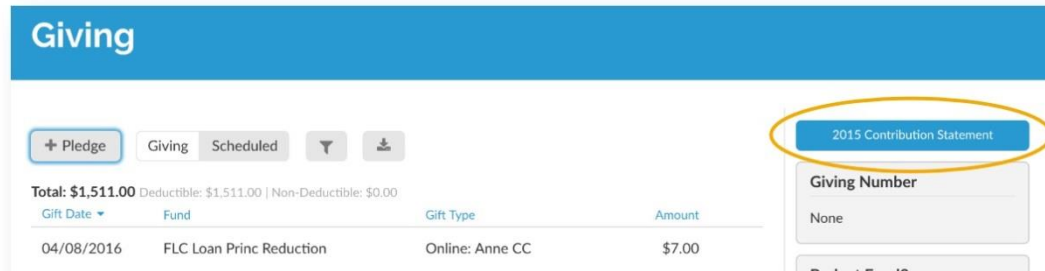
To edit a recurring gift:

1. Sign into your site.
2. Click **Giving** on the main menu.
3. Click **Scheduled**.
4. Click ••• next to the recurring gift you want to edit and select **Edit**.
5. Make any necessary changes, and click **Save**.

To cancel a recurring gift:

1. Sign into your site.
2. Click **Giving** on the main menu.
3. Click **Scheduled**.
4. Click ![? Unknown Attachment] next to the recurring gift you want to cancel and select **Cancel**.
5. Select whether you want to cancel only the gift you selected or all gifts in the series.
6. To confirm, click **Ok**.

To check for failed payments:

1. Sign into your site.
2. Click **Giving** on the main menu.
3. Click **Scheduled**. If there are problems with your gifts, a related message displays onscreen.

What happens if a recurring payment fails?

An email is sent instead of displaying the onscreen message.

Pledges

To set up a pledge:

1. Sign into your site.
2. Click **Giving** on the main menu.
3. Click **+ Pledge**, enter your pledge information, and save. You will receive an email once you meet your pledge.

To track your pledges:

1. Sign into your site.
2. Click **Giving** on the main menu.
3. If you have active pledges, they will display on the page.

Pledge information is included at the bottom of printed giving statements.