FIRST PRESBYTERIAN CHURCH REALM WEBSITE INSTRUCTIONS – https://onrealm.org/firstprescharlotte/
Compatible browsers - Chrome, Firefox, Microsoft Edge and Safari

FIRST TIME SETUP

By now all active members of FPC should have gotten an email from Realm inviting them to set up an account. If you have not gotten such an email, please check your spam or junk folder. The emails are automated and are identified as spam by some programs. Also, email invitations expire after 72 hours. If you need a new email invitation then please email realmsupport@firstpres-charlotte.org to ask for another to be sent to you.

When you click on the "Create Realm Account" link in the email, you will be directed to a webpage to setup your account. **In Realm the username is your email address**. If you share an email address with someone, you will have to share a REALM account.

You will need to create a password. It must be at least eight characters and have a mix of upper and lower-case letters and numbers or symbols. If your password is acceptable, you'll see a small green check to the right of what you typed. If not, you'll see a red marker. When you have set your password, click on the blue "Create Realm Account". This will put you into Realm and you will be directed to the "News" page.

USING REALM - Log into Realm at https://onrealm.org/firstprescharlotte

Realm will open on the NEWS page. You will see a menu of selections on the left:

- **Communications:**
  - o NEWS **-** Realm will default to the "News" page and will display any recent news that has been posted by the church or any groups you are in.
  - o INBOX – "Inbox" displays messages that have been sent to you and you can send messages to people without having their email address. When a message is sent, the recipient will receive an email that they have a message and a notification on their smartphone if they have the Realm Connect App.
  - o CHAT - "Chat" allows for instant communication between you and another person.
- **Events:** Events will show any calendar events posted for the congregation or for any of the groups you belong to. If you belong to multiple committees, having the Committee meetings as calendar events makes it easy to remember when they occur.
- **Giving:** Giving will show your contributions to the church. The default setting shows your giving for the current calendar year, but if you click on the "funnel" shaped icon above the "year to date" indicator, you can filter the results to show different date ranges. The print icon will allow you to download a .pdf of the giving record that you can print. The right pane will show your current and past pledges. Once a pledge campaign is active, you can update your pledge as well. NOTE: No one except you and the Financial Secretary has the ability to view your giving information. If you have questions about any of the giving information, please contact the Financial Secretary.
- **Groups:** Groups will list the FPC committees and teams you are a part of. Everyone should have "First Presbyterian Church" as a group, this is a church-wide group.
  After clicking on a group, you can do the following:
  - o Use the three circular icons to add a new post, add a photo or add an event (leaders only).

- o **News** will provide posts and events with the most recent at the top. Select any of the posts or events to reply and add to the discussion. If you attach a file to your post then the file will show both within your post as well as the Files tab.
  - o **Participants** will show all the members of the group. If you are a Group Leader then you will have additional information for each participant as well as a "Manage participants" button to add or remove a participant.
  - o **Files** is one of the best features in Realm. It provides a central place to share files within your committee. This way, Committee information is always available for all current members.
- **Find Groups:** this page lists the groups that are available for you to consider joining. Take time to look and see what the church members are doing.
- **Directory:** The Directory lists all active FPC members. Clicking on a member's name should pull up a page with contact and personal information that that person allows you to see. To send a message to the person, click the "Chat" icon under the person's name and follow the prompts. Note that only members who have created a Realm account and who have updated their Privacy to "Everyone in Our Church" will have their contact information show in the Directory. Refer to the Manage Privacy section below for instructions to update your privacy setting.

PROFILE & ACCOUNT SETTINGS

Access your settings by clicking your name in the upper right corner of the screen and select from the drop-down menu. This is where you can update your personal contact information that is used for the church office membership database:

- **My Profile** – Select "My Profile" to review your contact information. Select "Edit Profile" to edit any of your contact or personal information. There is a "Contact Information" tab and "Personal Information" tab.
- **Manage Privacy** – Privacy is in regards to your contact information such as address, phone and email address that is shown to others on the First Presbyterian Church Realm site. No one outside Realm could ever see this information. By default, your privacy settings are set so only Group Leaders + Church Staff can see your contact information. It is important that you change your privacy setting to "Everyone" so your contact information is available to everyone in the Realm Directory. This will make the Directory much more useful to everyone. Remember that all church members already have access to this information though the hardcopy church directory. So enabling others to see your contact information on Realm really does not threaten your privacy but rather makes it more convenient for members to communicate with each other.

Manage Account Privacy

Tell us what's ok to share with the church. Also, group meeting hosts' contact info may be visible, regardless.

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your contact and personal information can be seen by:

- ◉ Everyone
- ○ My Groups + Group Leaders + Staff
- ○ Group Leaders + Staff
- ○ Only Staff

- Manage Account – this is where you can change the password for your account and update your payment methods used for giving and paying for events.
- Email Settings – select "Email Settings" to personalize the frequency of email notifications for each group that you belong to.
- Sign Out – select to log out of Realm.

REALM CONNECT MOBILE SMARTPHONE APP instructions

Using the free Realm Connect app on your mobile device will significantly improve communications of all Realm posts and calendar events for the groups that you belong. Once downloaded, notifications are setup specifically for the app and is separate from the email settings in the web version of Realm. You must first have setup a Realm account and confirmed you are able to login to the web version of Realm before proceeding. Remember your login credentials for use in the app.

SETUP

1. Go to the App Store (Apple) or Google Play (Android). Search on "Realm Connect".
2. Select and download the Realm Connect App

3. Open the Realm Connect app and enter the same login credentials used in the web version of Realm. Remember that your username is the email address used to setup your Realm account. If you do not remember the email address used for your account, contact Lucy Caldwell for help to identify the email address.

4. At the bottom of the app screen, select "More" > Settings. Your Groups are all listed there. From here you can select what type of notifications you would like to receive from each group. Select a group and then update the level of notification for both PUSH and EMAIL notifications. If you are active in the group then it is recommended to set the notification to "All content and replies" so you get all communications instantly for that group.

USING THE APP

You will move around the App by using the News, Communications, Events & Giving icons at the bottom of the screen.

News: After logging in, you are sent to the NEWS page. News provides the most recent activities for all of your Groups. You can select any of the new posts and reply if needed from there.

- Post – If you need to start a new post for one of your groups then select the Post icon at the top of the News screen. Select the group you want to submit your new post to. Not all Groups will be available for posting.
- Photo – Likewise to posts, you can select one or multiple groups to upload a photo. Realm will ask you to allow it to access your photos. Select OK and then select your photo for upload.
- Event – You can add calendar events to any of your groups. Typically, you must be a group leader to add a new event. Enter the event Title, details, Start Time, End Time and Location. You also have the option to setup a recurring meeting by selecting a Frequency. You can also
- Communications – provides a way to send a message or chat with people at FPC. Even if they do not have a Realm account, Realm will send an email to them with your message. The advantage of using Messages instead of email is that you never have to remember an email address. You just start typing their name and the matches will pop up for you to select.

Communications: This section provides a way to send a message or chat with people at FPC. Even if the person does not have a Realm Account, Realm will send an email to them with your message. The advantage of using Messages instead of email is that you never need to know an email address.

Events: These are calendar events for all of your groups. An event could be a congregation-wide event posted by the church office or it could be a committee meeting posted by the Committee chair. Events provides an easy way to organize all the meetings you are invited to attend. Note that the Events section is where you can review all events that have already been setup. If you need to create a new event then you would do that in the News section.
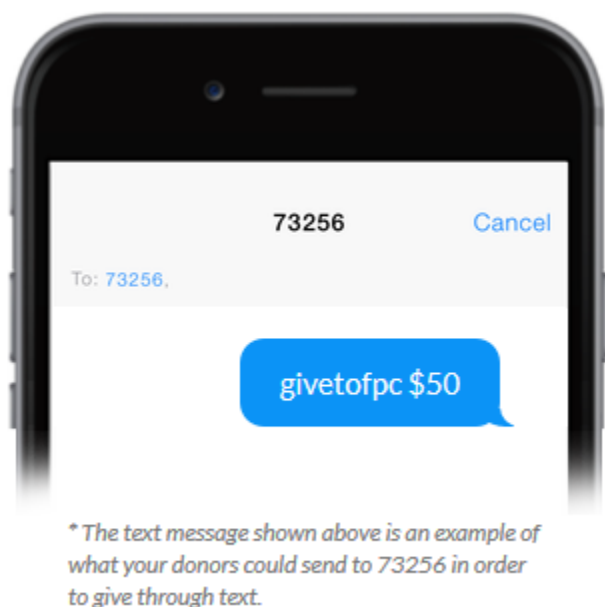
Giving:

- Make a Gift - allows you to easily make a donation to the church. This will be applied to your yearly pledge.
- Giving will show both your history of gifts and pledges going back to 2009. Giving is integrated with the ACS Finance module to provide your giving history in a save secure manner. NOTE: No one except you and the Financial Secretary has the ability to view your giving information. If you have questions about any of the giving information, please contact the Financial Secretary.

Directory: Access the church directory on the phone by clicking on the magnifying glass in the upper right of the NEWS page. Remember that only members who have created a Realm account AND updated their privacy to "Everyone in the church" will have their information available in the directory.

TEXT GIVING – You can quickly donate to the church through TEXT GIVING. See the example below.

- Text to 73256
- Content is – givetofpc followed by a $ and the dollar amount.
- You will be prompted to enter your payment information.
- You will receive an email receipt of payment.

* The text message shown above is an example of what your donors could send to 73256 in order to give through text.

Realm Online Documentation & Videos

Here are some quick links to learn more about Realm:

• Congregants Help – Help documentation for common Realm user functions

• Group Leaders Help - Help documentation focused on Group Leader functions and privileges to maintain their groups
  Group Leader Guide – PDF format

FOR HELP AND QUESTIONS email – realmsupport@firstpres-charlotte.org