



Summerville Methodist Church Realm Instructions

Summerville Methodist Church has entered into a partnership with REALM for a church database management solution. This system offers a portal for members who wish to create an account.

Access to Realm is available through both our custom website (<https://onrealm.org/SummervilleMethodist>) and the Realm Connect app, available for download in the app store.

First Time Setup

You will receive an invitation via email to join Realm. In the invitation email, you will find a link that allows you to create an account. When you click on the "Create Realm Account" link, you will be directed to a page to edit/create your account profile. Realm requests an email address - this will be your primary contact information, so be sure to enter/update information to the address you use most often.

Next, you will be asked to create a password. This password must be at least eight characters and have a mix of upper and lower-case letters and numbers, or symbols. You may want to write this down or save it somewhere for reference. If your password is acceptable, you will see a small green check to the right of what you typed. If not, you will 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. Realm will default to the "News" page and will display recent news and events for the Church as well as any specific groups in which you are a participant.

Please note-these email invitations expire after just 72 hours. If you need a new email invitation, please contact the Church office. If you have made that request, but have not received the email, please check your spam or junk folder. The email invites are automated, so they are identified as spam by some programs.

Using Realm

Log in to Realm at <https://onrealm.org/SummervilleMethodist>

The left menu pane shows the available Community functions.

The "Community" area of Realm houses many of the functions you'll want to access.



- ✓ Tasks
- ✶ Giving >
- 📊 Reporting >
- 💬 Communications >
- 📅 Registration Events >
- 👤 Profiles >
- 👥 Groups >
- 🗳️ Check-In
- 📍 Pathways >
- 👋 Volunteers >
- 👤 Users & Permissions >
- 🕒 Change Log
- ⚙️ Settings >

Messages will display any messages that have been sent to you, and is where you can send messages to other members. Once a message is sent, the recipient will receive an email they have a message on Realm and also a notification on their smartphone if they have the Realm Connect app and have enabled this feature.

Events will show any calendar events posted for the congregation, or for any of the groups you belong to.

Giving will show your current giving to the church. The print icon will allow you to download a PDF of the giving record that you can print. NOTE: Your giving record is private. Other members of the Congregation will NOT have access to your giving record.

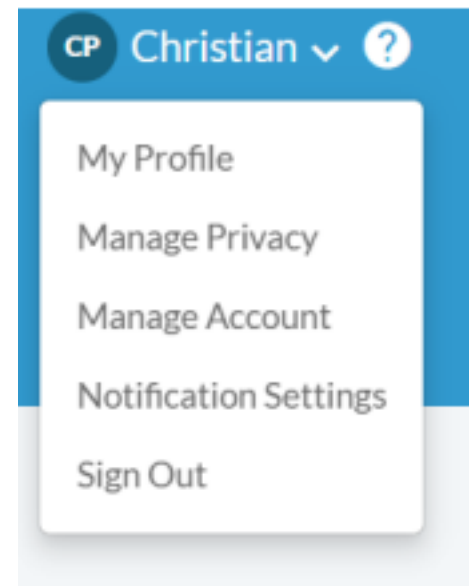
Groups will list the groups you are part of at SMC. Every member is a part of the group "Summerville Methodist Church".

Directory lists all active SMC members. Clicking on a member's name should pull up a page with contact and personal information that person allows you to see.

NOTE: only Realm users whose privacy settings reflect "Anyone in Our Church" will have their contact information show in the Directory. We strongly recommend that you have your privacy settings set in this way. You can adjust your privacy settings in your profile.

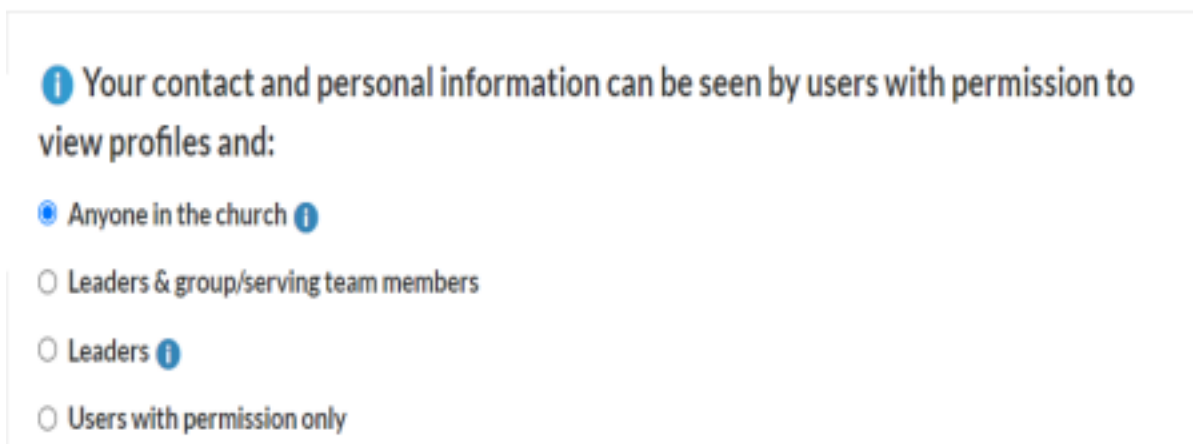
Privacy and Account Settings

You can update your profile and account settings by selecting the drop-down menu from the person-shaped icon in the upper right corner (as shown in the screenshot to the right). This is where you can update your personal contact information at any time. Updating your information here will also update the membership database used by the church office. *It is important that you review and update your Privacy and Email Settings.* Email Settings is where you select the frequency of your email notifications for each Group that you're part of. Select "My Profile" to review your contact information. Then select "Edit Profile" to edit any of your contact or personal information.



Contact Information – select the "Contact Information" tab if not already selected. Edit any of your contact information shown as needed. Press "Save" at the bottom of the screen. Your updated contact information will be used by the church office for all church communications. By updating your information in this way, you can maintain your family's current contact information without having to contact the church office. This information is used for the church directory, church mailings, and emails.

Manage Privacy- Privacy here refers to your contact information, such as address, phone, and email address, that is shown to other members on the Summerville Methodist Realm site. No one outside Realm could ever see this information on Realm. 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 in Our Church" so your contact information is available to everyone in the Realm Directory. This will make the Directory much more useful to everyone. Enabling others to see your contact information on Realm is a tool for better member-to-member communication.



Manage Account– this is where you can change the password for your account.

Notification Settings – this offers some important options. Here you can personalize the frequency of email notifications for each group to which you belong. NOTE: It is recommended to select “All content and replies” for each group so you don’t miss any group communications. Your selection here will affect how often you see what is going on with SMC’s Realm page.

Sign Out– this allows you to log out of Realm. However, if you do not sign out, Realm is designed to keep you logged in as a convenience so you will not have to sign back in the next time you open Realm (your browser and other security settings may affect whether this is possible or not).

Downloading & Using the Mobile App

Using the free Realm Connect app on your mobile device will significantly improve communications of all Realm posts and calendar events for the “Summerville Methodist Church” group and all other groups in which you belong.



Once downloaded, notifications are set up specifically for the mobile app. This means your settings for the mobile app are separate from the email settings in the web version of Realm. You must first have set up a Realm account and confirmed you are able to log in to the web version of Realm before proceeding. Your login credentials for the web version are used for the mobile app, too. Download the app using your Apple or Android smartphone or tablet.

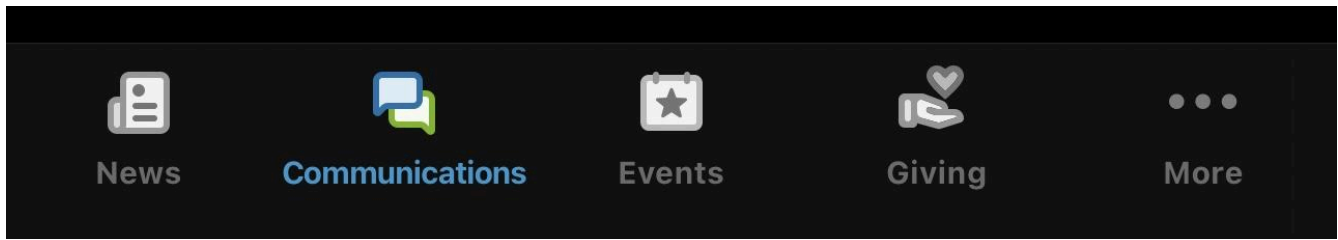
NOTE: If you have a large-screen tablet, it may be better to use the web version of Realm, since the mobile app functionality can be limited at times. You may want to explore the differences for yourself, since updates to both the web version and the mobile app are ongoing.

To download and set up the Realm Connect app- Go to the App Store (Apple) or Google Play (Android). Search for “Realm Connect.” Then select and download the App.

Open the Realm Connect mobile app as you would any other app and enter the same login credentials used in the web version of Realm. If you enter incorrect login credentials, you may be prompted for an invite code. If you receive that prompt, go back to the login and re-enter the correct login credentials. Remember that your username is the email address used to set up your Realm account. If you do not remember the email address you used to create your account, you can always contact the Church office for assistance.

Once you have access to the Realm through the mobile app, it typically does not prompt for login credentials again. Going forward, each time you open the app, it will go directly to

your News feed. Your Group Notifications are shown, listing all your groups. You may update your notification preferences in the App. Select a group and then update the level of notification to either “All content and replies”, “New content only” or “Nothing”. If you are active in the group, it is recommended to set the notification to “All content and replies” so you get all communications instantly for your group.



You can use the app through the News, Messages, Events & Giving icons at the bottom of the screen, shown above.

News – News provides the most recent activities for all your Groups. If you have new activity, it will show the number of new postings in a red circle by the icon. You can select any of the new posts and reply from there.

Communications – “Communications” provides a way to send a note to specific people at SMC. Even if they do not have a Realm account, Realm will send an email to the address we have in our files, so that they get your message. The advantage of using Messages instead of email is that you never have to remember an email address! Just start typing their name, and any names in the system that match will pop up for you to select.

Events – These are calendar events for all your groups.

Giving – Giving will show your giving history. Giving is integrated with the ACS Finance module to provide your giving history in a secure manner. **NOTE:** *Your giving records are confidential. Other members of the congregation will not have access to your giving record. If you have a question about your giving, please contact the Church office.*