

Realm Tutorial

We will cover:

- Signing In
- Finding Your Profile
- Editing Your Information
- Managing Your Privacy Preferences
- Your Giving
- Your Groups

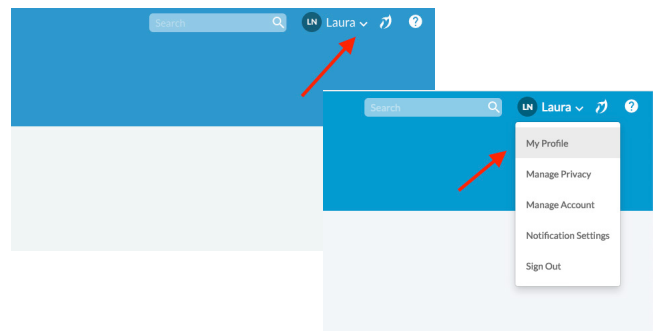
Signing In

- Go to www.onrealm.org
- Type in your email.
- Type in your password.
- Click blue “Sign In” button.



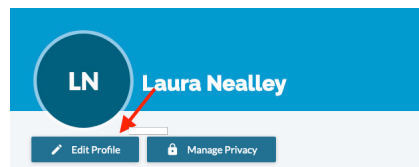
Finding Your Profile

- In the upper right corner is your name along with a small down arrow.
- Click on the down arrow and a menu will pop up.
- Click on My Profile.



Editing Your Profile

- Click on the Edit Profile button.
- You can edit Contact Information.
 - Name
 - Address
 - Phone Numbers
 - Email Addresses
- You can edit Personal Information
 - Birthdate
 - Gender
 - Marital Status
 - Allergies
- When finished, click the blue Save button.

A screenshot of the "Edit Laura Nealley" form. The form has a blue header with the title "Edit Laura Nealley". Below the header, there are two tabs: "Contact Information" and "Personal Information". The "Contact Information" tab is active. At the top left of the form, there are "Save" and "Cancel" buttons. A red arrow points to the "Save" button. The form fields include: "Profile Type" (a dropdown menu with "Person" selected), "Name" (a text input field with "Laura Nealley" and a blue checkmark icon), "Individual Label Name" (a text input field with "Laura Nealley"), and "Family Label Name" (a text input field with "Laura Nealley"). A red arrow points to the "Personal Information" tab.

Managing Your Privacy

Realm allows you to choose who sees your contact and personal information. Your choices:

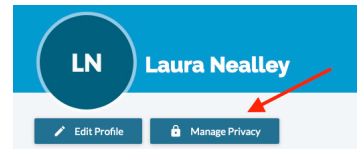
- Anyone in the church (with a Centenary UMC log in - think of it like a church directory)
- Leaders and group/serving team members (only your group leaders and members will see your information)
- Leaders (only your group leaders will see your information)
- Church Staff Only

Notes - Church staff will always be able to see your contact and personal information.

- Only the Sr. Treasurer and database administrator can see your giving information.

No matter what permissions you choose, no one will be able to see your giving information.

To manage your privacy settings, click on Manage Privacy



The Privacy Setting window will pop up. You may choose to set your privacy the same for both contact and personal information by clicking one of the top choices.

A screenshot of the 'Custom Privacy' settings window. At the top, it says 'Your contact and personal information can be seen by staff and:' followed by four radio button options: 'Anyone in the church', 'Leaders & group/serving team members', 'Leaders', and 'Church staff only'. The 'Custom Privacy' option is selected, indicated by a blue dot and a red arrow. Below this, it says 'Choose different privacy levels for specific contact fields and personal information. Note that this information is always visible to staff.' The window then lists several fields with their current privacy settings: Home Address (411 E Grace St Richmond, VA 23219-1837) set to 'Church staff only', Home Phone ((804) 648-8319) set to 'Church staff only', Primary Email Address (centunitedmethodistchurch@gmail.com) set to 'Church staff only', and Personal Information set to 'Church staff only'. Each field has a pull-down menu with a down arrow. A red circle highlights the down arrow for the Home Address field.

You may also choose “Custom Privacy”. This allows you to choose a different privacy setting for each piece of contact information (address, phones, emails) and personal information. Once you click on Custom Privacy, the choices will appear.

Each piece of information has a pull down menu - click on the down arrow to open the menu.

The menu with the privacy choices will appear. Highlight your choice.

A screenshot of the 'Custom Privacy' settings window, similar to the previous one, but with the 'Home Address' pull-down menu open. The menu shows five options: 'Anyone in the church' (highlighted with a blue bar), 'Anyone in the church', 'Leaders & group/serving team members', 'Leaders', and 'Church staff only'. The 'Save' button is visible at the bottom left.

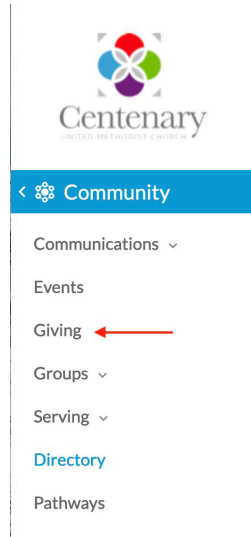
I highly recommend keeping the personal information as “Church Staff Only”.

Once you have your choices made, click the blue Save button at the bottom.

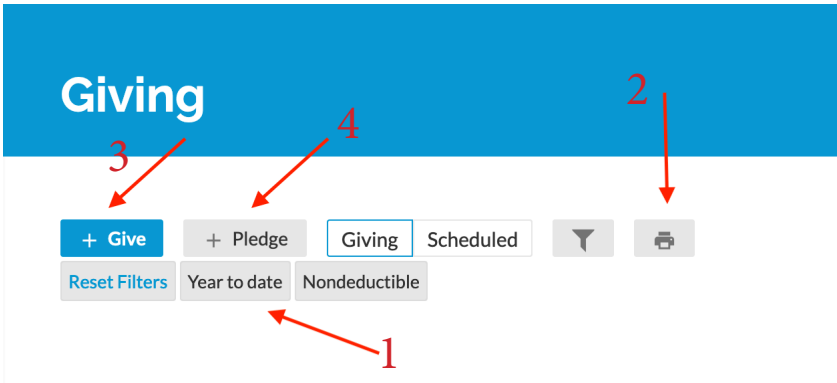
A screenshot of the 'Custom Privacy' settings window, showing the final state where the 'Home Address' is set to 'Anyone in the church' and 'Personal Information' is set to 'Church staff only'. A red arrow points to the 'Save' button at the bottom left, which is highlighted with a red circle.

Your Giving

Click on “Giving” in the left side menu.



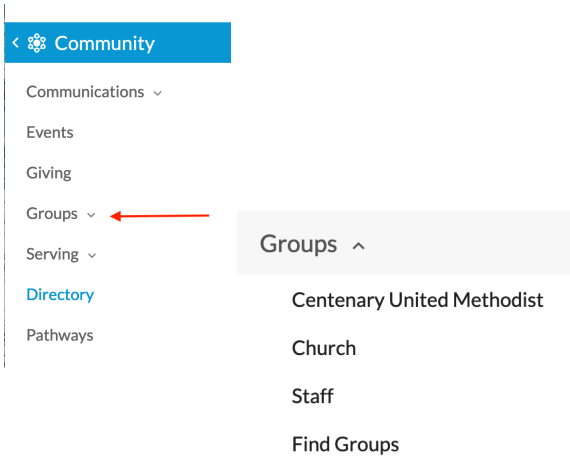
From here you can check your giving based on a date range (1) print a statement (2), give online (3) and create a pledge (4). Just click on the button and fill in the information.



Your Groups

Click on “Groups” on the left side menu.

A list of your groups will appear below.



Click on any of the groups to see any news posts, the participants, files that have been shared with the group, and attendance - if that is taken. Just click on the appropriate tab.

