

## *UUWestport's congregational system.*



### **Frequently asked questions (FAQs)**

#### ***How do I get started on Realm?***

You start by setting up your login. To do that you must respond to the email invite from onrealmmail.org with the subject line "...Join your church family". Click on the link and your email address should be in there. Then it will ask you to create a password. Remember to save that password in some way (write it down, or let the computer remember it). When the big envelope shows up on the screen, go check your email inbox again for an account confirmation email. Click the link in that email and that will ask you for your phone number. When your account is confirmed you will be able to log in.

#### ***How do I log back in later?***

Click on the Pledging/Realm tab in the upper right corner on our website. Then click on any blue word "Realm". If you don't remember your password then click on "forgot my password" on the sign in screen and it will email you a link to reset it. It is handy to bookmark or set as "favorite" the sign-in page <https://onrealm.org/> so you can find it again easily.

#### ***I typed in my telephone number and it didn't work, what now?***

Hold on to the second confirmation email asking for your phone number. If you tried all your different phone numbers (home, cell etc) and that still doesn't work, then please email us with your correct phone number and wait a few work days for it to get through the system, then go back to the confirmation email and try again. If you need a new invite sent, email Dorothy (Dorothy@uuwestport.org) or Sue ([sue@uuwestport.org](mailto:sue@uuwestport.org)). If you still don't see an invite, check your spam or junk folder for an email from onrealmmail.org. If you see that invite email, click on it and follow the above steps. If you still can't find it, email Dorothy or Sue so they can confirm your email address and send you a new invite.

#### ***How do I enter my pledge in Realm?***

When in your profile, click on the "Giving" word on the left, then click on "+Pledge". Under "Pledge Now" you enter the amount and frequency on the top line. If you are planning to contribute online through Realm, be careful to select the fund "Online Gifts to Pledge". If you will not be contributing through Realm, then select the fund for the specific pledge fiscal year. Annual Budget Drives are run in advance of the start of the fiscal year in July and cover until June of the following year. Make sure the "total pledge of" amount showing on the right side is what you intend to give for the total year. Adjust the pledge period dates if need be to fit the timeframe, as that will also adjust the "total pledge of" amount. Then click on "Save Pledge". You can enter your pledge in Realm and still choose from the various contribution methods which are outlined on the "Pledging" tab on our [www.uuwestport.org](http://www.uuwestport.org) home page. Your Realm profile is where you can see where you are on fulfilling your pledge since all contributions, online or otherwise, are visible in the "Giving" section of your profile. If you need to change your pledge, please email Dorothy.

### **Online Giving:**

You have two options within Realm for making an online contribution – credit/debit card and eCheck. We cannot hold any credit card information here at UUWestport. **You must enter your card information yourself on Realm.** You are of course welcome to contribute with your online bank's bill paying feature if you wish or other methods listed in the Pledging tab on our website.

Click on "Giving" on the left side in your profile and then on "+Give" and fill in the boxes. You must first have a pledge entered before you can start contributing towards it; follow the steps above to enter a pledge. To have online contributions count towards your pledge, choose the **Online Gifts to Pledge fund**. For the payment frequency, make sure you are careful to the right frequency so that your card doesn't unexpectedly get

charged more often than you wanted. To get a pdf statement of all gifts for the calendar year, click on the printer symbol on the far right.

***How do I change or correct a mistake in the amount/frequency of my recurring credit card charge?***

If you want to change a future scheduled gift, you go to your profile, click on "Giving" on the left, then click the "Scheduled" button. If you hover over the next scheduled gift, you will see a small blue button with a "gear". Click on that. You will have two options here as well: "Edit" and "Cancel". If you choose "Cancel", it will remove this gift from the scheduled occurrence. If you choose "Edit", you can change information about the gift such as the amount, the frequency, and the credit card or bank account. Remember to click the "Saved" button at the bottom.

If your goal is to completely cancel all future occurrences as well as your card information from Realm, you need to click on your name in the lower left corner and choose "Manage Account & Settings", then click on the "Payments" tab. On the right side of the gift, you'll find the blue gear button and click on that. It then shows two options: "Edit Account" and "Delete Account" and you select the one that you want. To read more on these functions, click on the "?" in the upper right corner.

**Privacy, contact information and your family members' profiles:** Realm is limited to our congregation and staff only. People surfing the world-wide web do not have access to this system; it is by invitation only.

***How do I figure out who can see my information?***

There are several levels for the privacy settings. The most broad is everyone in our congregation or "Everyone". This does not mean it shows to the world at large, just those from our congregation who are on Realm. More restricted settings that are possible include your groups (like LFD Groups) and the respective leaders of those groups. Staff will always have visibility of your information. Remember, this will be the way other congregants can find you -- our online directory -- so don't limit it too much. You can click on the "?" to get more on privacy settings.

***I have moved – can I change our contact information?***

Yes, please do. Once you have entered it on your profile, it should update it automatically for your whole family. Don't forget to hit the "Save" button at the bottom.

***Can I upload a photo of myself or my family?***

Yes, please do. You can upload a photo of your family together and this photo would be the photo that appears in a photo directory. A clean photo focusing on faces would be most helpful for your fellow congregants. Look at the picture in the top left hand corner of your profile. Of the two circles below the picture, click on the grey circle it will cycle between the individual and family pictures. Once the family picture is selected you can simply click on where the picture should be and upload a picture.

***How do I enter email addresses for other family members?***

Parents and spouses are welcome to add and edit the contact information for their other family members. Please do not, however, enter your email address into another family member's primary email address line. Each email address for each profile must be unique. If you do not want a child to receive emails, do not enter anything in the primary email address line.

**Groups:**

Lifespan Faith Development (LFD) classes, many Choirs and committees are active as Groups in Realm so click on "Groups" in the left bar of your profile to see more. For those of you volunteering in LFD, this is a key source of information for your class. To get listed on the roster of a group, just click on the blue "I'm interested" button and your message will go to the group's leaders.

**For Help:** Use the ? button in the upper right corner of your profile to find answers to lots of questions you may have. It opens a wiki site which has a chapter on all the different things you can do in Realm.