

UUWestport's congregational and online giving system.



Frequently asked questions (FAQs)

How do I get started on Realm?

You start by setting up your log in by responding 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. Try putting in your cell number if you first tried your home number and vice-versa. When your account is confirmed you will be able to log in. It is also handy to bookmark or set as "favorite" the sign-in page 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 and that still doesn't work, then please email us (Dorothy@uuwestport.org) 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@uuwestport.org.

I've heard about Realm but still haven't seen the email invite, what now?

Make sure to check your spam or junk folder for an email from onrealmmail.org with the subject line "...Join your church family". If you see that invite email, click on it and follow the above steps. If you still can't find it, email Dorothy at Dorothy@uuwestport.org so she 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" tab, then click on "+Pledge". Under Pledge Now you enter the amount and frequency. Be careful to select the correct year and leave the default dates as is. Canvasses 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 is what you intend to give for the total year and 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 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 at Dorothy@uuwestport.org.

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.

Online Giving:

You have two options within Realm for making an online contribution – credit/debit card and eCheck. We do not 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 regular checks or your online bank's bill paying feature if you wish.

Click on the "Giving" tab in your profile, to see the fields where you need to type in information. You set the amounts and frequency directly yourself. To have online contributions count towards your pledge, choose the **Pledged General Fund** for the current fiscal year (our fiscal years run from July to June). Online contributions towards pledges for a new fiscal year will be possible starting in June, at which point two pledge years will be

visible so be sure to select the correct one. You want to make sure you fulfill a pledge before setting up a recurring contribution to the next year's pledge. Also, you must first have a pledge entered for a year (see above) before you can start contributing towards it.

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 the "Giving" tab, 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 get extra 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 RE 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 this link to get a handy "how-to" on setting your privacy levels of your information.

<http://wiki.acstechnologies.com/display/realm/Members%27+Guide>

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?

Yes, please do. A photo of your face would be most helpful for your fellow congregants to recognize you.

Entering 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 (formerly RE) classes, many Choirs and committees are activated as Groups so click on "Groups" in the left bar of your profile to see more. For those of you volunteering in RE, 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.