



## GETTING STARTED IN REALM

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Realm® connects our church administration, accounting, ministry and community in one place.

### OVERVIEW

Realm, in its simplest form, is our church database. Realm is a product of ACS Technologies (ACS) and we have been a client of ACS for years. The member information that the church office had in our ACS database has been converted into Realm, i.e. your address, your phone, your email, etc.

You should have received an email invitation to join Realm. To get started in Realm, we want to share some basics about your account profile and how to update and manage it.

Realm now empowers you to keep your information up-to-date. Maybe your address has changed and you forgot to update the church, now you will be able to log into Realm and change that yourself.

Each person has their own unique record in Realm. Each person, therefore, will need their own unique email address to access Realm. If you share an email address with a spouse/partner, only one of you will be able to access Realm. We encourage you to reach out to the church office at 515.225.8334 and provide separate email addresses.

Each person/record is assigned a *Family Position* (head, spouse, child). By default, ACS Technologies/Realm assigns the head of household position to the male record of household accounts. This is out of Faith Lutheran's control. You can update/change as needed.

Each member of the church will have a record in Realm regardless of age. At the age of 21 child records convert to their own household account. **Please DO NOT add a member to your family in Realm.** You risk making a duplicate record for you or your family members. Please contact the church office if you feel you need to add a family member and we will make sure they do not already have a record first.

### STEP 1: TIPS FOR SUCCESS

#### BROWSER:

##### Desktop/Laptop

For best results, keep your browser updated to the latest version. Are you using the latest version? Go to [whatsmybrowser.org/](http://whatsmybrowser.org/) to find out. We recommend using the latest version of any of the following internet browsers:

- Chrome
- Firefox
- Microsoft Edge
- Safari

NOTE: Realm will NOT work on Internet Explorer.

### *Operating Systems:*

Some older operating systems cannot use the latest browser versions. If your operating system cannot use the latest version of your browser, update the operating system first. This will not only give you access to the best features in Realm, but will help ensure your security on the Internet. Out-of-date operating systems and browsers are far more vulnerable to attacks. Realm/ACS Technologies no longer support IE (Internet Explorer).

### *Mobile*

Some of Realm's larger features require the workspace of a full monitor and will not work on a mobile device. Others are well-suited to smaller devices. But, to get the best experience, you need the latest version of your mobile browser. Older devices, whose operating systems can't support it, might not work. iOS 9.3.5 and earlier, for instance, are too outdated to work reliably with Realm.

Realm's best mobile experience comes from using their app. You can download it in the iTunes app store or on Google Play.

## **STEP 2: ACCEPT THE INVITATION**

You will receive an email with an invitation to join Realm. This will come to the email account that is currently in Faith's database. You will need to click on the link in the email. This is the only way to log into Realm for the first time. The link will take you to a sign-in page. Enter the email address that you received your invitation at in the Email Address field. Next, choose a password.

Again, Realm accounts are set up for each individual, therefore, each individual needs a unique email address to have and create a Realm log-in. If you share an email address with a spouse/partner and each of you have provided that email address to Faith, only one of you will be able to access Realm. We encourage you to reach out to the church office at 515.225.8334 and provide separate email addresses.

### **Your Realm password must:**

- Be 8 or more characters long. There is no maximum limit on length. The longer a password, the more secure it is. Each additional character makes it exponentially harder to crack.
- Meet 3 of the following additional requirements:
  - Contain at least 1 uppercase character.
  - Contain at least 1 lowercase character.
  - Contain at least 1 symbol (!,@,#,\$,%,&,^, etc.).
  - Contain at least 1 number.
  - Contain 15 or more characters.

### **Your password cannot:**

- Contain any 3-or-more-character sequence from your username or email. If, for instance, your username (email address) is JeffAnderson@jeffsemail.com, your password could not contain "jeff", "ander", etc.
- Include 3 or more repeating characters (222, etc.)
- Include 3 or more characters in sequence (123, 321, abc, etc.)

### **Forgotten Passwords**

If you enter the wrong password 5 times in a row, you cannot try again for 5 minutes.

## STEP 3: UPDATE YOUR PROFILE

**PROFILE OVERVIEW:** Your profile in Realm will consist of *Contact Information* and *Personal Information*.

- Privacy Setting and Your Online Security
  - Don't be afraid to include all of the information asked for on your profile. You can decide later what data you want to hide online by setting your privacy preferences.
  - By default, the viewing of your personal and contact information is limited to members of groups you are in, group leaders, and staff members.
  - If you choose to, however, you can make your information visible to all registered users of Faith's online community as part of the Member Directory.

### Update Contact Information

- Full Name.
  - Note that this field contains a clickable icon. You can either:
    - Enter a name, such as "Mrs. Krista Shandy" or "Mr. Amos Jackson, Jr." into the field directly. The name will be "parsed" automatically for the database. In other words, the software will attempt to break the entry into its component parts.
    - Click and parse the entry manually, entering the different parts of the name into different fields.
- Home Address.
  - Typically, you will enter your Home address in this field, but there are other options. A college student, for instance, might choose to enter a School address instead.
  - Parsing
    - Enter an address, such as "1200 Griggs Dr, Grosse Point, MI 48215" or "456 E. Lyerly Lane, Blackfoot, Idaho, 83221" into the text box directly. The address will be "parsed" automatically for the database. In other words, the address will be broken into its component parts: country, address, city, etc. You can see the parser work by running this test: Enter the address 123 Commerce St. <Enter> Independence, MO 64050 in the Address text box. Click, and notice how the address has been parsed automatically.
    - Click and parse the entry manually, entering the different parts of the address into different fields.
    - Add address. Click to enter an alternate address, such as a summer home. Select Use as mailing address to enter a date range during which your church mail should be sent here. This address will only be used for mailings.
- Email.
  - Reminder, family members **CANNOT** share email addresses if they intend to each have their own login.
  - You can have a preferred email and an alternate email.
- Phones.
  - You can enter up to four different phone types. Anyone with a family position of "Head" or "Spouse" may designate a Primary Phone number. You must also be a "Head" or "Spouse" in order to change these numbers.
  - When viewed on a mobile phone or on a computer enabled with a phone feature like Skype®, you can touch or click a phone number to dial it.
- Social Media.
  - If you want, your profile can include links to your Twitter, Facebook, LinkedIn, and Instagram profiles. In which case, links to your social network pages will be added to your contact information. Others who have permission on those sites to view your page can click on one of these icons and do so.
  - Paste the URLs for your social media pages if you want to make them available to others. These will be displayed on your profile page as links.

## Update Personal Information

Gender, birthday, and marital status for example--Faith needs to keep this information current for its records and to give you accurate reports, statements, and updates.

- Your Age
  - Feel free to enter your full birthday. The year and your age will NOT be displayed on your church profile.

## Add, Update, or Delete Your Photo

In Realm there are two photos on your record; an individual photo and a family (household) photo. You will see two dots under the profile photo. The first dot displays your individual photo and by clicking on the second dot, you can view and edit the family (household) photo.

- To add or update your photo
  - Log into the site.
  - Click your name and select My Profile.
  - Point to the image to the left of your name and click it.
  - Click New Profile Photo.
  - Browse to the image you want to use and select it.
  - Adjust the image size using the slider.
  - Click Save. You might need to refresh the page to see your changes.
- To delete your photo
  - Log into the site.
  - Click your name, and select My Profile.
  - Point to the image to the left of your name and click it.
  - Click Remove Profile Photo.

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## **STEP 4: What's Next?**


THANK YOU! Your profile set up is now complete. We will share more on additional Realm features after we get members set up in Realm initially. However, two features you may wish to explore first are the Member Directory and Giving. Each can be found under the left side navigation menu.

To now access Realm via a web browser visit <https://onrealm.org/FaithLutheran/SignIn>. We encourage you to bookmark this page.

### Giving

You can check your giving history, pledges, or print a list of your past giving. As you give throughout the year, keep track of it within your profile's giving history. This lists all of your contributions, whether they're manual, online, or pledges to a campaign. The date range you select determines the gifts you see, and you can print a list of your current gifts or contributions you've given in the past.

You can filter your list of contributions to view the ones you want.

1. Sign into Realm.
2. Click Giving on the main menu.
3. To narrow the list of contributions, click the filter icon , select limiting criteria, and click Filter.

We encourage members to give online via Realm. We will be transitioning current online givers from Vanco to Realm. For more information on giving online, please contact Kathy Evans, Business Administrator at [kathy@faithlc.org](mailto:kathy@faithlc.org) or 225-8334.

## Member Directory

### *What is the Online Directory?*

Being in the online directory just means that your privacy settings are such that other Realm users at Faith can see your profile listed when they click Directory in the main menu. Think of it like being in the printed directory booklet that many churches used to--and some still do--publish.

The Directory is a list of individuals associated with our church.

1. Log into Realm.
2. In the left side navigation menu, click **Directory**

### *Don't See Contact Information?*

It's possible that someone can be in the directory, but their contact information is hidden by the privacy settings they've chosen. Individuals without a login will not appear here either.