

Dear UUSIC member or friend,

Hopefully you've heard about our exciting new management software, Realm. This new program will allow staff and leadership to perform their duties more efficiently, but more importantly it will provide a space for members to create profiles, join groups, and make online donations.

We are asking all members and friends to:


1. Create a password and log in to Realm
 - a. **Only members and friends who create a login will have their contact information show up in the online directory. Please complete this step even if you do not plan to use Realm regularly (contact the office if you would like help). Not creating a login may cause others to think you have left UUSIC because you will not appear in the online directory.**
2. Confirm or update your contact information and preferences
 - a. Choose which information you would like to show up in the directory, and what you'd like to remain private for just the staff to access (you can change these settings at any time)
 - b. Add individual and family photos to your profile (if you'd like)
3. Set up online giving through your bank account or credit card if you previously had UUSIC automatically deducting your pledge or capital campaign contributions (or would like to begin to do so)
 - a. We are encouraging members to use bank accounts (ACH) rather than credit cards to avoid losing a part of your donations to processing fees
 - b. The office will cancel all current automatic donations on June 30th, so members will need to set up new giving to begin starting July 1st if they wish to continue with recurring automatic contributions
4. Become acquainted with our online directory
5. View your groups or request to be added to any groups you would like to join

For your convenience, we have drafted a quick start guide for our members to assist with each of these steps. In addition, Realm has several resources including a detailed member guide and searchable support center. Of course, our administrative staff is here to help you with this process if you have any questions. Bailey Kelley will be available for office hours on Mondays from 9:30 until noon and Tuesdays from noon until 2:30. Feel free to stop by the Oakdale House, call her at 319.337.3443, or email uusic.assistant@gmail.com with specific questions or to schedule a one-on-one training session.

Realm Quick Start Guide



This is a very basic guide to help you become familiar with Realm. You can always contact the office if you have further questions, or explore Realm's extensive support system by clicking on the question mark in the upper right of any page or "Support" in the lower left.

1. Creating a password and logging in to Realm
 - a. Check your inbox (or spam folder) for an email from UUSIC inviting you to create a password and log in for the first time.
 - i. If you do not have an email invitation from Realm, please contact the office.
 - b. Click on the link in the email. You will be prompted to create a password.
 - i. Realm requires strong passwords to protect your information. If you enter a password and see an exclamation mark in the text box, click on it to see how to create a password that meets Realm's security requirements. If you are unsure how to create a strong password, please contact the office.
 - c. After logging in for the first time, you will be taken directly to your profile page. From here you can complete step two, updating your contact/personal information and setting your security preferences.

2. Updating contact information and setting security preferences
 - a. If any of your contact or personal information is incorrect, you can easily update it. Click the gear next to your full name () and select **Edit Info**.
 - b. At the top of the page, you can toggle between **Contact Information** and **Personal Information** tabs. Enter or edit the fields displayed.
 - i. Note, especially, any fields marked with an asterisk. These must be completed before you can save.
 - c. Don't be afraid to include any of the information prompted in Realm. You can decide later what data you want to hide online by setting your privacy preferences. Next to any piece of information in the **Edit Info** page, you can click on the padlock icon to determine who will be able to see it.
 - i. While you can hide the majority of your information from most of your church, you should know that regardless of your settings, your information will still be visible to our administrative staff. Also, once you have a login, your name and picture are visible to all others at your church who have a login.
 - d. You can also add a photo to both your individual profile and your family profile (if you have one). Simply click on "Add an Individual Photo" to the left of your full name. (To add a photo of your household/family, click on the second white circle below the profile photo.) Click **Choose File** and browse to your image. Click **Save**. (You can edit or delete your photo by clicking on the pencil or X when you hover over the image.)

3. Setting up online giving


For added security and convenience, members are now able to control their online giving. If you are already have a recurring payment in place, it will be canceled on June 30th and you will have to set it up through your own profile. The office is happy to help you with this if you have trouble.

- a. Select **Giving** on the main menu on the left hand side of the page. Click on  , enter the amount, and select the fund. To give to more than one fund at once, click **Give to an additional fund**. Select a gift frequency (one-time or recurring) and enter the appropriate date information. (Note: During months that have less than 31 days, recurring gifts scheduled for the 31st of each month will process on the last day of the month.)
- b. Click **Add New Payment Method** to add a new payment method.
 - i. We recommend using a bank account (ACH) instead of a credit card, if possible, to avoid processing fees.
- c. Complete the process by clicking **Give**.
- d. To cancel or edit a recurring gift, click on **Scheduled** from the giving page, point to a line in the list, and click  . Select **Edit** to change the amount or frequency of your gift; select **Cancel** to stop it.

4. Finding people

- a. To look up another member and go to their profile page, click on the magnifying glass in the search bar at the top of the page. Begin typing in their name. A list of profiles that match your entries will appear. When you see the name you want, click on it.
- b. You can access the complete online directory by clicking on **Profiles** from the main menu on the left.

5. Joining groups

- a. You may have been added to groups by a group leader by the time you've logged in. See which groups you are a part of by clicking on the "Groups" tab from your profile page. Click on the name to go to the group page.
- b. To search for groups to join, click on **Groups** from the left-hand main menu. Click on the filter button () to search by name or other information. You can also search for groups by clicking on **All** left of the search bar at the top of the page and selecting **Groups**. From the group's page, click **I'm Interested** to let the group leader know you'd like to become a member.
- c. Group pages include a message board, a resource area, and an email service. For more information on how to use these functions, please contact the office or explore the Realm support center. (Note: Clicking on the question mark in the

upper right of any page will take you directly to the article that is relevant to the current page.)