Transfiguration Greek Orthodox Church
Connecting to Realm

Transfiguration Greek Orthodox Church has moved to a new kind of church record-keeping solution called Realm®. It primarily serves the administrative needs of our staff, but it also offers some exciting opportunities to support the way you are involved in our church. Not only will this improve work-life for our ministry staff, but it will also make it easier for our church family to connect with each other, keep up with what's going on, and grow as a connected community.

- **News**—Keeps everyone up-to-date with the latest posts, photos, and events for your group and for your church as a whole
- **Posts**—Post messages to your group and comment on posts by others in your group
- **Photos**—Capture your moments together and share them with your group
- **Events**—See event details (date, time, location, etc), submit your RSVP, and sign up to bring something
- **Files** —Access your group's shared files
- **Messages**—Send your entire group, or select individuals, a message that starts a conversation
- **Participants**—See names and basic profile details for the people in your church or group, based on their privacy preferences.
- **Notification Settings**—Manage your preferences for group notifications and emails

For members of our parish, Realm is accessible to join via an email invitation only. Joining is not open to the public. It is set up this way to protect your information in the directory upon joining Realm.

If you're interested in joining the Parish Community on Realm, follow the steps below:

Step 1: Fill out the **Stewardship Commitment Card**. If you prefer to print and mail or bring the form to church, download it **here**. You must set up a <u>pledge</u> and <u>giving</u> in Realm to be considered a Steward of the church.

Step 2: Within 48 hours of filling out the form, you will receive an email with your invitation to join Real.

Step 3: Click the link and proceed to create a password.

Step 4: Set up your account using the step-by-step instructions.

<div align="center">

IMPORTANT:

If you are a member still donating through Vanco, the old eGiving platform, click here to log in and cancel your reoccurring transactions. Then come back here and follow the steps above to create your Realm account.

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Download the "Realm Connect" app for your phone. Stay connected to your group wherever you go with Realm's mobile app named *Connect - Our Church Community*. It is available for iPhone and Android devices. This free app enables leaders to communicate with members in a timely manner, and it keeps members engaged throughout the week. Although people are not required to use the app to participate in your group, it Makes it a lot easier.
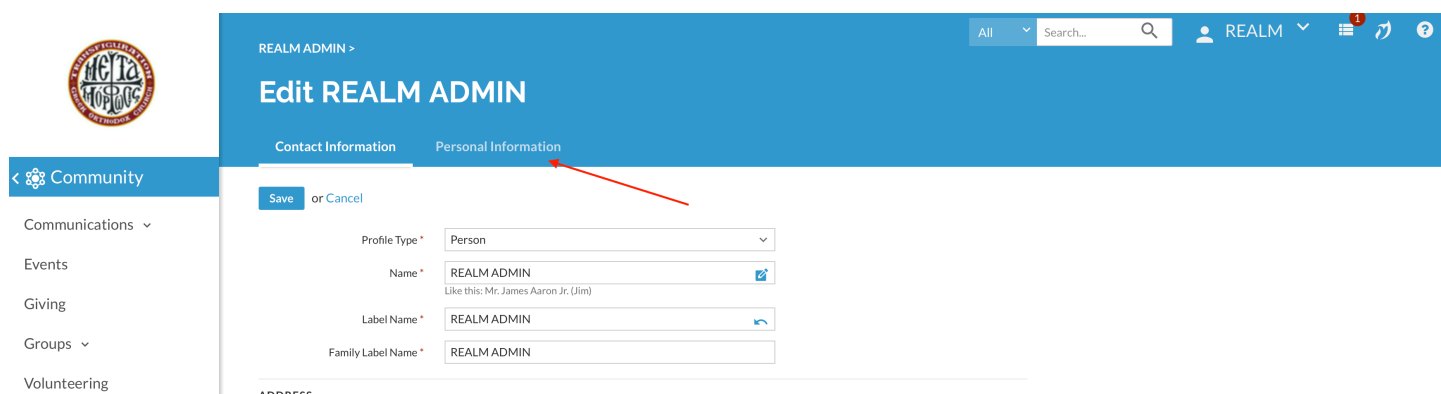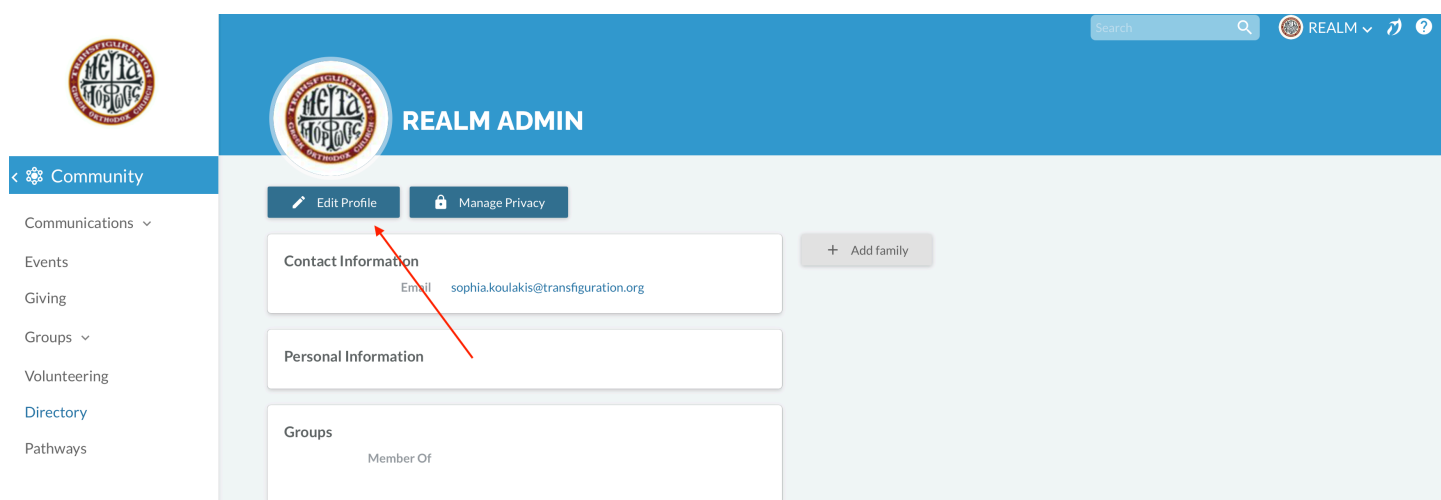
Setting up your Account

SIGN UP ON A COMPUTER ONLY. DO NOT TRY AND SIGN UP USING THE APP. ONCE YOU SIGNED UP ON THE COMPUTER, DOWNLOAD THE APP AND LOG IN.

1. You will receive an invitation link to join Realm. Use the link to create a password for your account. The email that you receive this link is the email used for your account. If you need to change the profile (account) email address, you can do this once logged in. (See notes below)

2. The email for YOUR profile needs to be yours and set as primary. Do not add your spouses email address as a primary email address. Each spouse will receive a realm invite link. Each person needs to have their own unique email. **No two people can share an email address.**

   If you're telling yourself, "I don't want to manage the finances…", I understand that. Both Head of Household and Spouse are able to access the Giving history. The Head of Household can manage the giving as your family wishes, however EACH person needs to have their own primary email address. This important when the Groups (Ministry) portion launches.

3. Yay! You have created your login and now see your profile. Now please spend some time to edit all the information in your profile so it is accurate. Update everything from Contact information to Personal information (second tab at the top).

4. Allergies, Talents, and Interests: Edit this section so we know how you would like to get involved in the community and how we can use your expertise if need be.

5. Click Save

6. Update all Family member's information. If you have children, add them with their appropriate information. If your kids are old enough and have their own email address add it. This will allow them to create their own profile and manage their own groups (ministries). Please be as detailed as possible.

7. Managing Privacy: We recommend selecting Leaders & Group/serving team members to view your contact information. Everyone will be listed in the directory section, but the information shown here is based on your privacy settings.
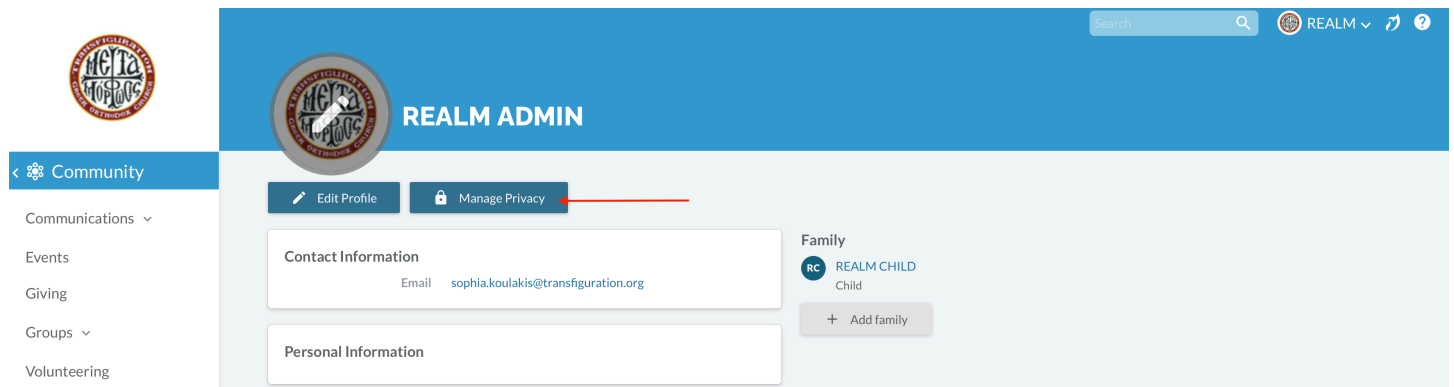
8. Since most of us do not know each other. We would like for you to add a photo of yourself so others can start putting a name to your beautiful face! Please add a photo for each of your family members.
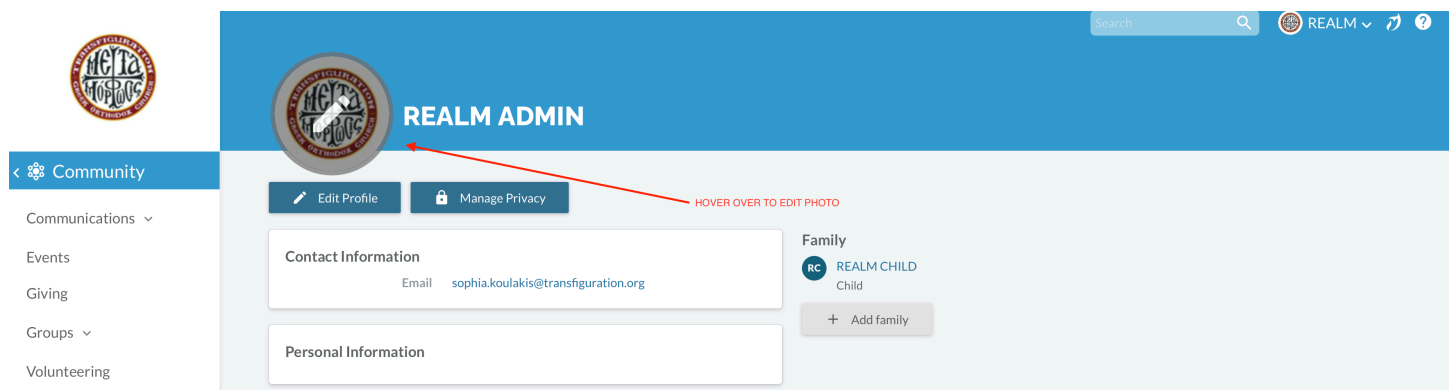
Notes:

To change the Account Email:
- Under My Profile (top right), click on edit profile. Towards the bottom, you will see Account Email.
- Click the blue Update account email
- Enter your new account email, confirm it, and enter your password.
- The system should log you out and then you will need to sign back in using that new Account Email and the password.

Giving

*** We will be transitioning from Vanco eGiving to the Giving through Realm. Please log into your old account through <u>Vanco</u> and cancel all recurring transactions. Then set up those reoccurring transactions in Realm.

Please transition your eGiving donations by January 31, 2021

OVERVIEW OF THE GIVING SCREEN

On the left hand side, under Communications, you will see a Giving section. Click Giving. This brings you to your Giving history. You will be able to see the following:
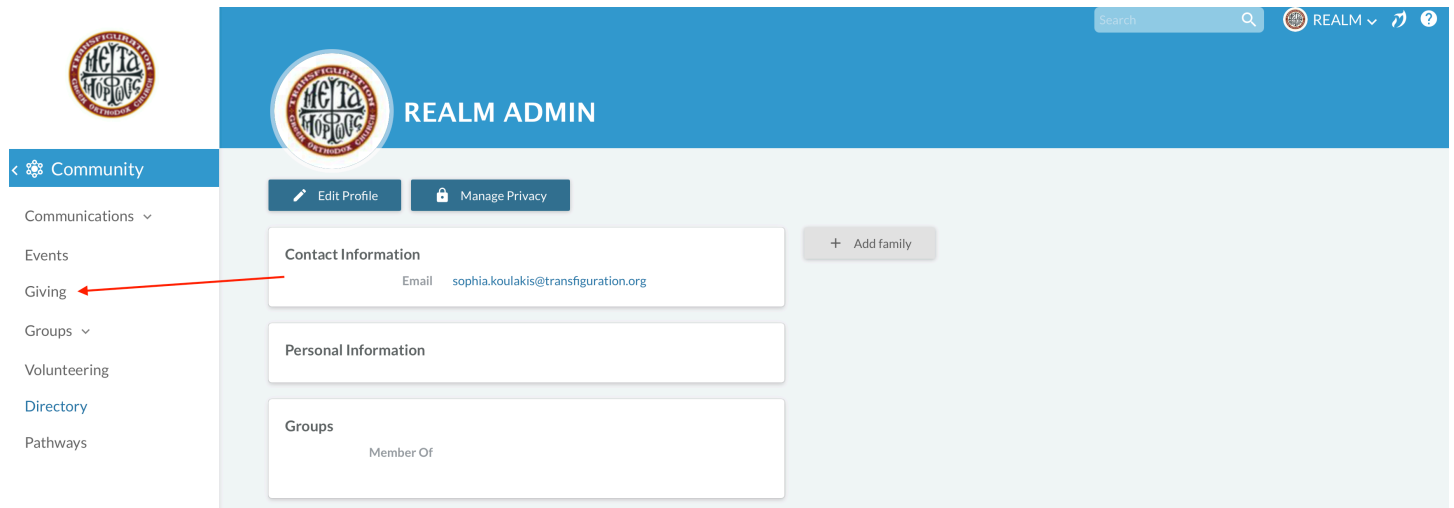
A. Your giving number and if your giving is synced with your spouse on the right.
B. Current pledge campaigns with total pledged and remaining balance.
C. Giving tab will show you your giving history
D. Scheduled tab will show you if you have any scheduled gifts. For example if you have a recurring transaction, you'll see it here.


Note: There might be some discrepancies with your giving history. Please understand we are doing our best to keep accurate records. With this new system, we are hoping to lessen the errors by giving you, the parishioner, access to view your history, as needed. If you would like to help us resolve the discrepancies, please email <u>stewardship@transfiguration.org</u> and we will work with you to sort it out.

HOW TO SET UP A PLEDGE

On a computer: After you created a profile and are in your account. The first thing you should see is the News feed.

1. On the left hand side, under Communications, you will see a Giving section. Click Giving.

2. This brings you to your Giving history. You will be able to see your giving number and if your giving is synced with your spouse on the right hand side. Under that you will see current pledge campaigns on the right hand side with total pledged and remaining balance.
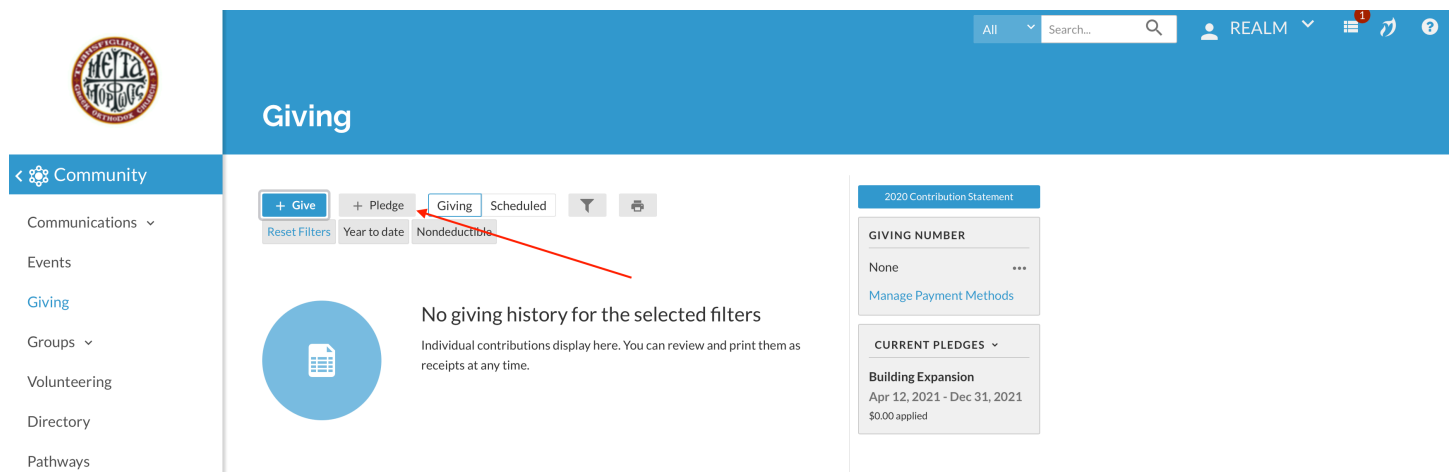
3. To set up a pledge, click the button that says "+ Pledge".

4. Fill in the blanks according to how you want to set up your pledge. Make sure to select the correct Stewardship Campaign. Once finished, click "**Save & Set up Online Gift**".

5. Enter the amount and the fund account. (Stewardship or Building Expansion)

6. Click Give Multiple Times and adjust the settings to correspond to the frequency of the gift.

7. Add a stop date of 12/31/21.

8. Click continue and proceed with entering your credit card information or bank account information.

9. Check the box at the bottom if you would like to contribute an extra amount to offset the processing cost.

10. Once all the information is entered, select GIVE

HOW TO SET UP A ONE TIME GIFT

On a computer

1. On the left hand side, under Communications, you will see a Giving section. Click Giving.
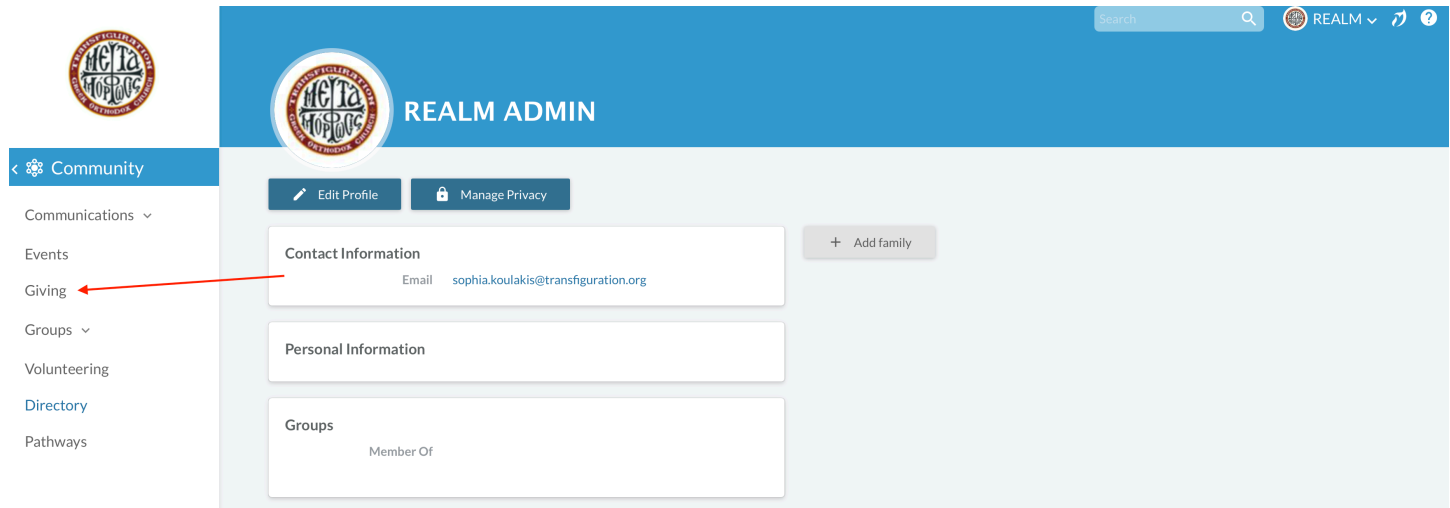
2. This brings you to your Giving history. You will be able to see your giving number and if your giving is synced with your spouse on the right hand side. Under that you will see current pledge campaigns on the right hand side with total pledged and remaining balance.

3. To set up a one time donation, click the button that says "+ Give".
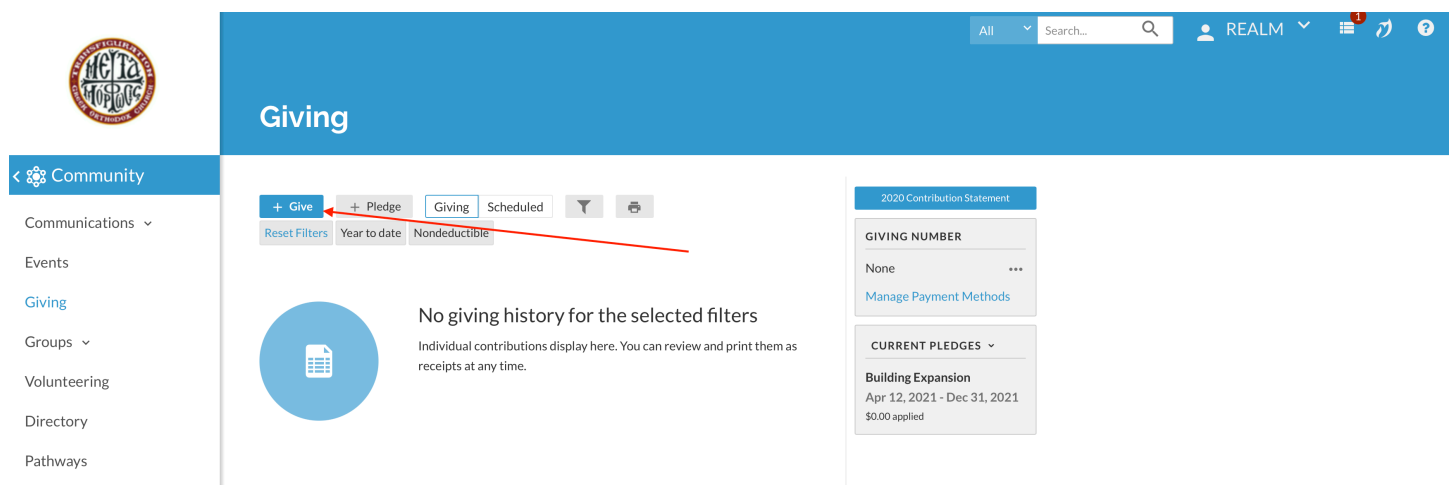
4. Enter the amount you want to donate and the correct fund account. (ie. Stewardship, Building Expansion, Candles, Virtual Tray, Benevolent Fund)

- Click "+ Another Fund" if you want to donation to an additional fund account.

5. Click Give Once and the date you want to make the donation.

6. Click continue and proceed with entering your credit card information or bank account information.

7. Check the box at the bottom if you would like to contribute an extra amount to offset the processing cost.

8. Then click GIVE to finalize the donation.

## IS YOUR GIVING HISTORY NOT ACCURATE?

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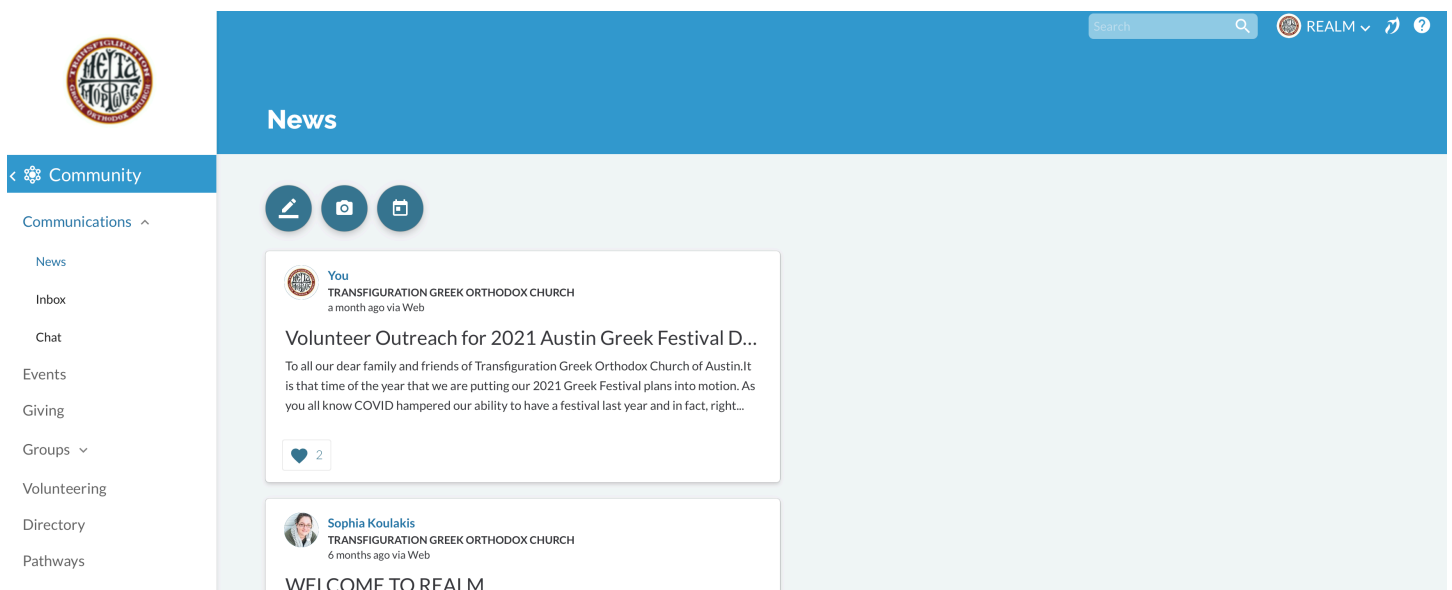
PARISH NEWS

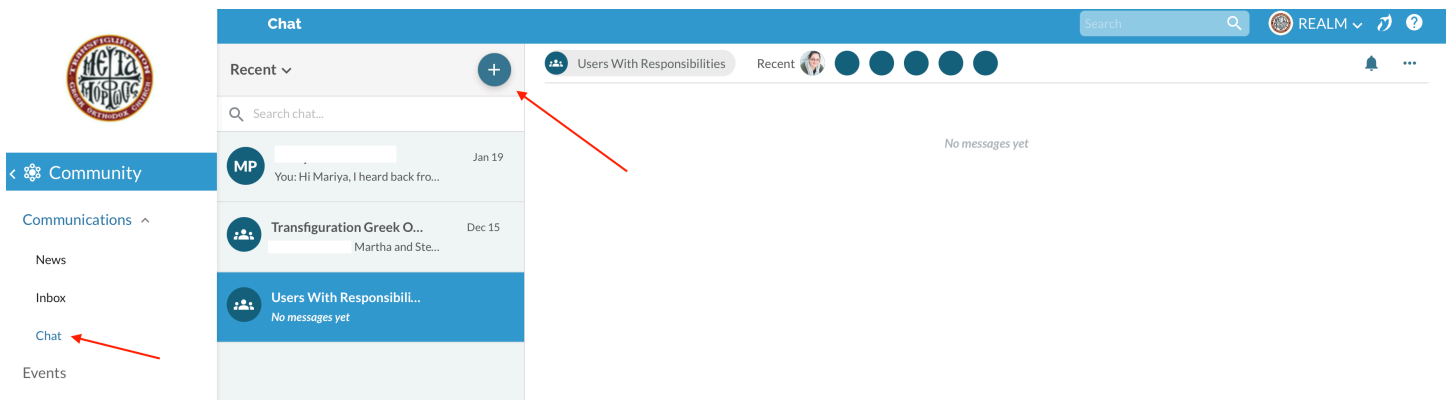1. From your dashboard click on the Communications tab on the left hand side.
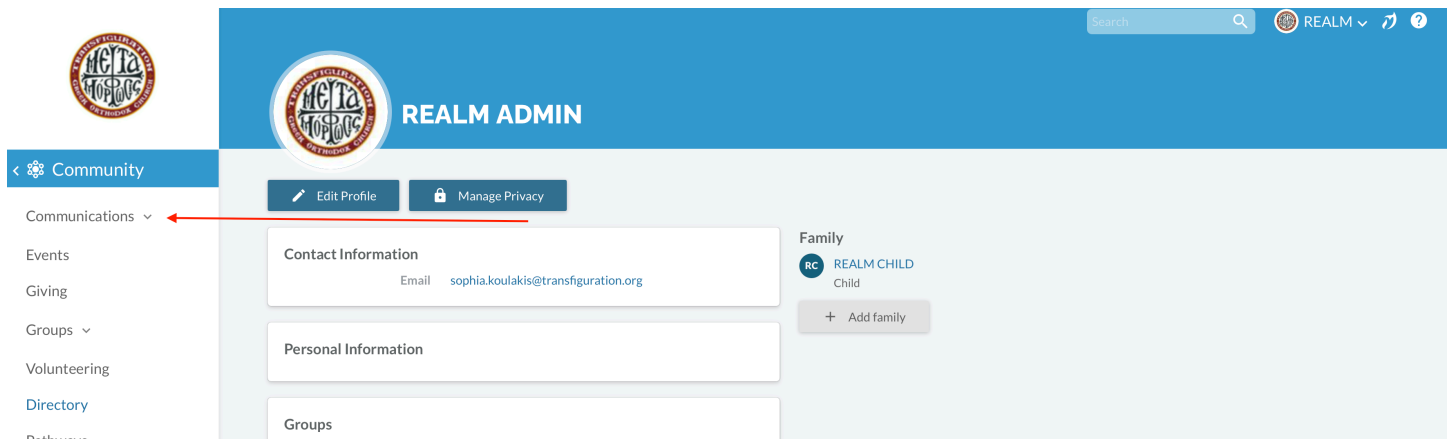
2. Then click on News:
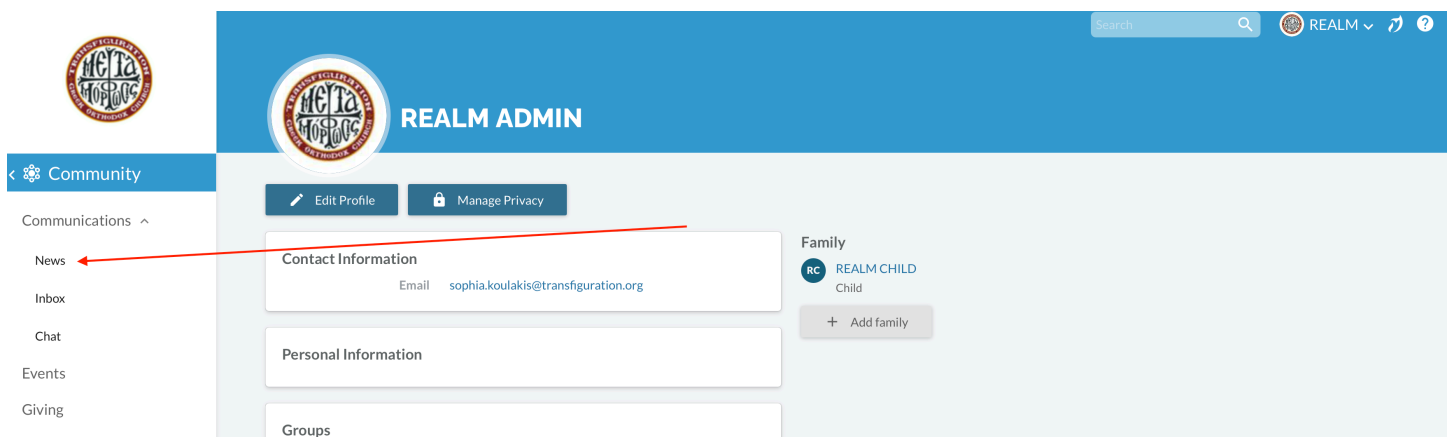
3. Here you will see all parish updates

4. If you click on 'Chat', you'll be able to private message any parishioner that has created an account in Realm. To begin a private chat, click on the + at the top.

5. Start typing the name in the "TO" field. Write your message and click send.