



**Congregant User  
Quick Start  
Guide**

# Update Your Profile

## To update your photo

1. Log into Realm.
2. Click your name in the upper right corner and select **My Profile**.
3. Point to the image to the left of your name and click on it.
4. Browse the image you want to use and select it.
5. You might need to refresh your profile page to see the change.

## Update Contact Information

Your profile contains your contact information. This is what other members will use when they want to get in touch.

1. Log into Realm.
2. Click your name in the upper right corner and select **My Profile**.
3. Click **Edit Profile**.
4. On the **Contact information** tab, enter or edit the fields displayed.
5. Note, especially, any fields marked with an asterisk. These must be completed before you can save.
6. Click **Save**.

## Update Personal Information

Gender, birthday, marital status, etc. Fort Hill Church needs to keep this information current for its records and to give you accurate reports, statements, and updates.


1. Log into Realm.
2. Click your name in the upper right corner and select **My Profile**.
3. Click **Edit Profile**.
4. On the **Personal Information** tab, complete or edit the fields displayed. Fields marked with an asterisk must be completed before you can save.
5. Click **Save**.

*Please note:* **Please** enter your full birthday. The year and your age will not be displayed on your church profile.

## Set Your Privacy Preferences

By default, the viewing of your personal and contact information is limited to group leaders and staff members. If you choose to, however, you can make your information visible to all registered users of Fort Hill Church's Realm. Please note that Fort Hill Church limits Realm accounts to those who are active participants at Fort Hill Church. It is not open to those outside of the Fort Hill Church community.

1. Log into Realm.
2. Click your name in the upper right corner and select **My Profile**.
3. On the **Info** tab, next to **Edit Profile**, click on the **Privacy icon**.
4. Select a family member (if more than one).
5. Click one of the buttons above the line to apply that setting to all information in the profile or click **Custom Privacy** and select a setting for each field.
6. Click **Save**.

A blue rectangular button with a white padlock icon on the left and the text "Manage Privacy" in white on the right.

While you can hide the majority of your information from most of your church, you should know that, regardless of your settings, contact data will still be visible to certain members of your church staff.

A family member with the primary position of "Adult" or "Co-Adult" can also change privacy settings for other members of the family.

## Fort Hill Church Directory

### Find People in the Directory

Find a friend!

1. Sign into Realm.
2. Click **Directory** on the left side of the screen.
3. If using the app, select **More** under the three dots in the lower right corner. Click **Directory**.
4. In the search box enter the name of the person you want to find. You can enter both names, one name, or just part of one name. As you type, a list of possible matches is displayed.

### Get a Map

Click a member's home address to open a new tab that shows the address in Google Maps.

## Can't Locate Someone?

Depending on a person's privacy setting choices, you may not be able to view his or her contact information.

## View the Directory

The Directory is a list of individuals associated with Fort Hill Church. Some names might not include contact information. While everyone's name appears in the Directory, their contact information can be hidden by changing their privacy settings.

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

## Your Groups

### To View Your Groups

1. Log into Realm.
2. Click **Groups** in the menu. The groups you are a member of display in to the drop-down menu.

### To see who is in your groups

1. Log into Realm.
2. Click **Groups** in the menu.
3. Click the name of a group, then click the **Participants** tab.

## Your Giving

You can view your giving history, pledges, or print a list of your past giving. You can also make a contribution or set up a recurring gift.

### Contributions – Online Gifts

To make an online contribution from your profile page:

1. Sign into Realm.
2. Click **Giving** on the main menu.
3. Click **+ Give**. If you don't see this button, please contact the church office.

4. Enter the amount you want to give, then select the fund. If the fund has the memo field enabled, complete this field to add a note. To give to more than one fund at once, click the **+ Add Another Fund** button.
5. Select a gift frequency and enter the appropriate date information. Click on **Continue**.
6. Enter your payment information. If you have a saved payment method, you can use it or click **Enter a Different Payment Method** to add another payment method.
7. Click **Give**.

### **To Edit a Recurring Gift**

1. Sign into Realm.
2. Click **Giving** on the main menu.
3. Click **Scheduled**.
4. Click **•••** next to the recurring gift you want to edit and select **Edit**.
5. Make any necessary changes and click **Save**.

### **Editing the Start Date**

If you need to edit the start date of your recurrence, you must cancel the current gift and enter a new one with the correct start date.

### **To Cancel a Recurring Gift**

1. Sign into Realm.
2. Click **Giving** on the main menu.
3. Click **Scheduled**.
4. Click **•••** next to the recurring gift you want to cancel and select **Cancel**.
5. Select whether you want to cancel only the gift you selected or all gifts in the series.
6. To confirm, click **OK**.


### **What about months that have less than 31 days?**

During months that have less than 31 days, recurring gifts scheduled for the 31<sup>st</sup> of each month will process on the last day of the month.


### **Will I be notified about recurring gifts?**

Yes, if you set up a recurring online gift, you will receive an email when the end date has been reached.

### **To View Your Giving History**

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

### **To View Your Future Gifts**

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


### **To Check for Failed Payments**

1. Sign into Realm.
2. Click **Giving** on the main menu.
3. Click **Scheduled**. If there are problems with your gifts, a related message displays onscreen.

### **What happens if a recurring payment fails?**

An email is sent instead of displaying the on-screen message.

### **To print your giving statement:**

1. Sign into Realm.
2. Click **Giving** on the main menu.
3. If necessary, filter your list of contributions (see above).
4. Click  . Add a comment to the giving statement if necessary. The output is downloaded as a PDF file that can be opened from your browser.

# Pledges

## To Track Your Pledges

1. Sign into Realm.
2. Click **Giving** on the main menu.
3. If you have active pledges, they will display on the page.

Pledge information is included at the bottom of printed giving statements.

# Payment Methods

## Change Your Payment Methods

Use this window to add, update, or delete the credit card, debit card, or bank account information you use to make online contributions to Fort Hill Church. You can also view any messages about failed or delayed contributions.

1. Sign into Realm.
2. Click **Giving**.
3. Inside the column on the right, click **Manage Payment Methods**.
4. To add a new payment method, click **Add Payment Method**, complete the fields, and click **Save**.
5. To update or delete a payment typed, click **•••** and select **Edit Account** or **Delete Account**. Complete the information on the screen fields.

*What happens if I have scheduled payments?* If you have scheduled payments assigned to a payment method you wish to change, you will not be able to delete the payment method until you reassign the recurring payment to another payment method or cancel the upcoming payments. If this is the case, a popup window will guide you through the process.