

## Realm Implementation at First Church – Training Outline – as of 8/19/24

Grace and Peace to You,

In John 15, Jesus talks about vines, branches, and fruit. “I am the vine; you are the branches. Those who abide in me and I in them bear much fruit.” This is all about our connection to God, to one another, and to the larger world. Our spiritual and communal health are dependent on the health and strength of our connections.

Realm is a tool that we at First Church have in our toolbox to make our connections strong and efficient. It is a tool for discipleship, fellowship, and giving of our time and our resources. From an operations perspective, using Realm provides both laity and staff the tools to streamline communication and information for our shared ministry. Realm is the central hub for online giving, online membership directory, church calendar, sign-ups for volunteer opportunities and events. First Church staff use Realm to facilitate their responsibilities and communicate with their committees and groups.

This training guide equips our First Church community to use Realm as a ministry and communications tool. We invite you to join us in tending to the vines and branches of our connection with one another.

Gratefully,  
Rev. Britt Cox  
*Executive Pastor*

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Please note that this guide has three sections:

- **Page 2: Introduction for Users with Basic Information** includes user profile and security settings, the church directory and event calendar.
- **Page 5: Instructions for Users Engaged in Groups and/or Ministries** addresses the communication and collaboration functions of the system as well as creating and signing up for church events.
- The last section is specifically for **Group Leaders** and starts on **Page 9**.

If you note the need for any changes or corrections to this document, please email [Realm@FaithAtFirst.com](mailto:Realm@FaithAtFirst.com).

*Download the Realm Connect app to your phone if you haven't already.  
Login – if you need first-time access, please email [Realm@FaithAtFirst.com](mailto:Realm@FaithAtFirst.com)*

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### Introduction for Users with Basic Information Access Needs

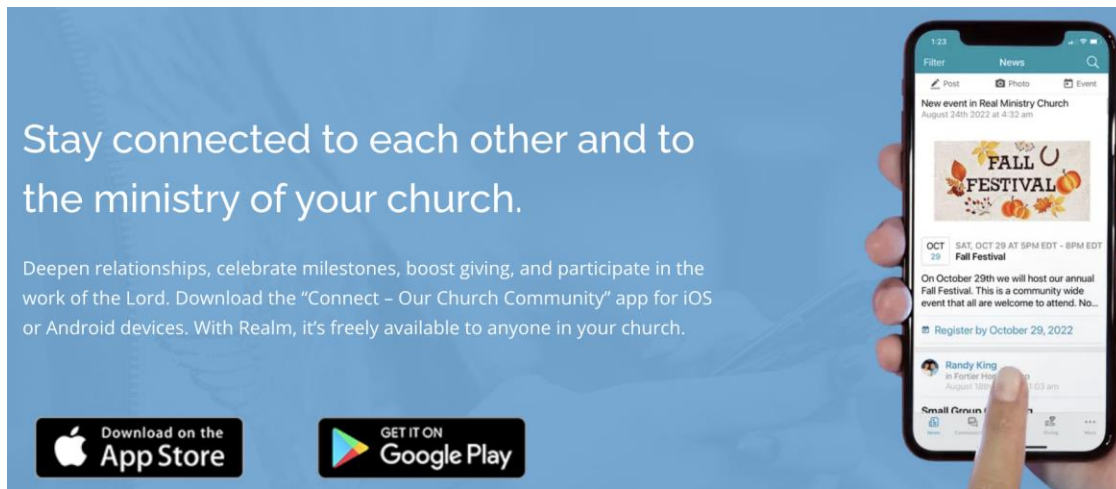
One of the biggest benefits for using Realm Connect at First Church is the up-to-date pictorial directory at your fingertips!

In addition, the app makes it easy to stay abreast of church activities and to track your giving. This first section explains how to use these features. You'll learn how to:

- Create and change your profile data, including your security settings.
- View the current church directory.
- Follow the latest church news.
- Check your giving status (as well as give)!

To start, you need an account for First Church's Realm system. If you do not know what that is, or remember how to login, contact [Realm@FaithAtFirst.com](mailto:Realm@FaithAtFirst.com).

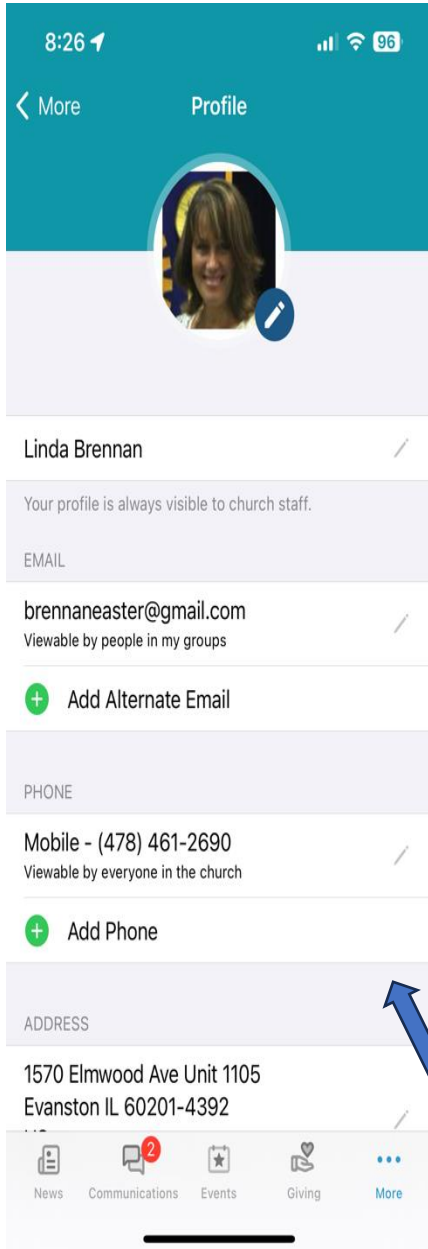
Then you'll want to download the Realm Connect app from the [App Store](#) or [Google Play](#):



Login into the app with the same userid and password you set on the website, and you're ready to go!

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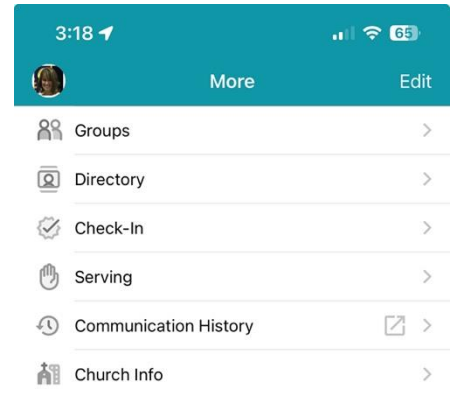


### To Create and Change Profile Data

1. Select the three dots, “More”, at the bottom right of the screen.
2. Select the photo or circle for a photo at the top left and choose “profile”.
3. You can edit any of the fields by clicking on the pencil icon. This is also where you establish your security settings to determine who can see your information.

### To View the Church Directory

1. Select the three dots at the bottom right of the screen.
2. Scroll to any name in the directory.
3. Use the search icon at the top to enter a name to find if you'd prefer.
4. Select the individual to see their profile (as their settings allow).
5. Click on their email address and it will take you to your email app; if you select a phone number you will have other options to contact them.
6. After sending an email, you will see a VERY small arrow in the upper left corner to return to Realm Connect.

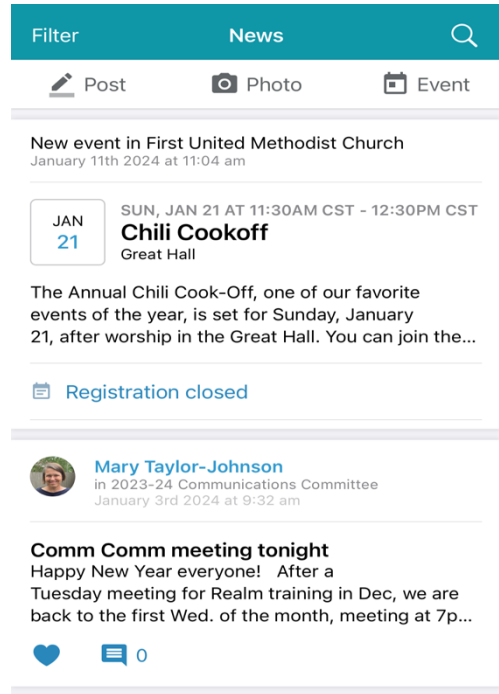


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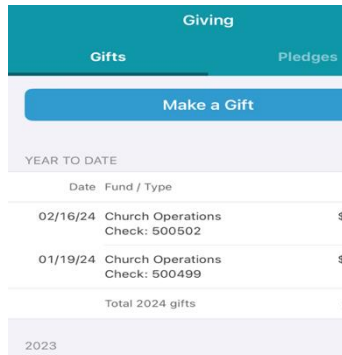
## To Follow the Latest Church News

1. Select the icon for “News” in the bottom left corner. This is a chronological list of postings related to the groups you are in, e.g., the entire congregation, committees, study groups, service teams. If you want to add something yourself, you have three options at the top of the screen:
2. Select “Post” to send a written communication to your selected group. You can attach a file if you like, by clicking on the paper clip icon.
3. Similarly, select “Photo” and you can choose photos or take one, much like text messages.



## To Give and View the Status of Gifts and Pledges

Select the “Giving” icon at the bottom of the screen.



1. You will see a chronological list of your contributions. To donate select “Make a Gift”.

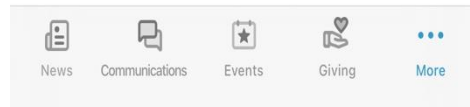
This will take you to the church website in your phone’s browser application.

2. Likewise, if you have pledged, you can switch the view by selecting the grey “Pledges” in the upper right. This will show you.

3. To return to the Realm Connect app, you will see that VERY small arrow in the upper left corner.

### Other Icons

There is much more functionality to take advantage of in Connect. If you want training for more than basic information access, please contact Church Office.



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### Instructions for Users Engaged in Groups and/or Ministries

In addition to the above functionality, you may find it helpful to learn some additional uses of Realm Connect as you participate in small groups or a ministry area. In addition to the functions described above, you may want to:

- Send/receive messages.
- Collaborate with the members of your groups.
- Register and check-in to events.

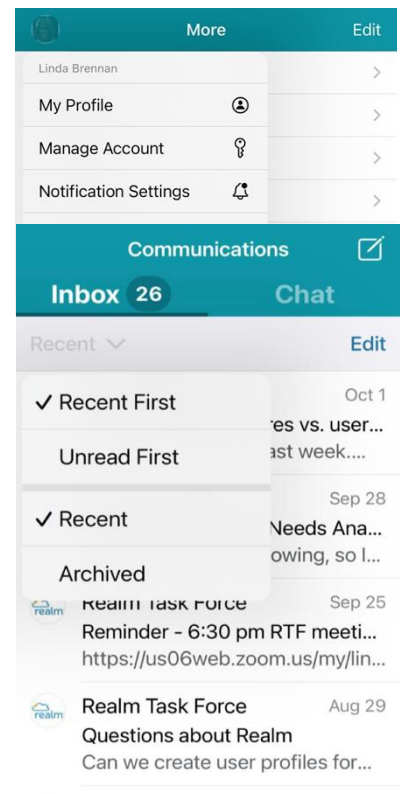
#### To Send and Receive Messages

First, you will want to be sure you have the right settings for notifications, which is helpful for collaboration and staying current with group's activities. To change your notification settings:

1. Select “More” and then click on your profile picture.
2. From the drop-down menu click on “Notification Settings”.
3. Select the ways and frequency of how you want to be notified.

There are two kinds of messages that you can exchange in Realm Connect, “Inbox” and “Chat”. The Inbox is the more useful of the two. With this feature, you can compose messages to any group for which you are a participant or leader.

1. Select the Communications icon at the bottom of the app screen. There you see two folder tabs, one each for the Inbox and the Chat.
2. Click on Inbox.
3. Click the “Compose” icon (square with a pencil) in the upper right corner of the Inbox.



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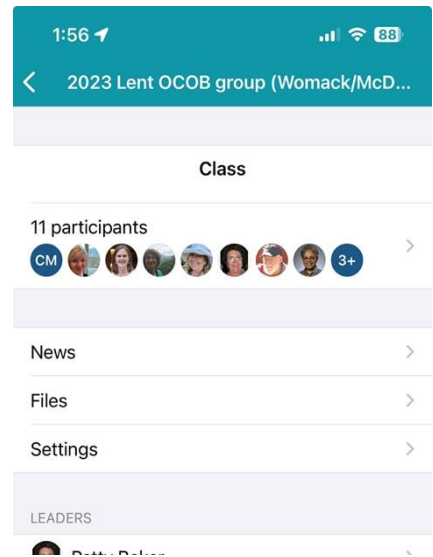
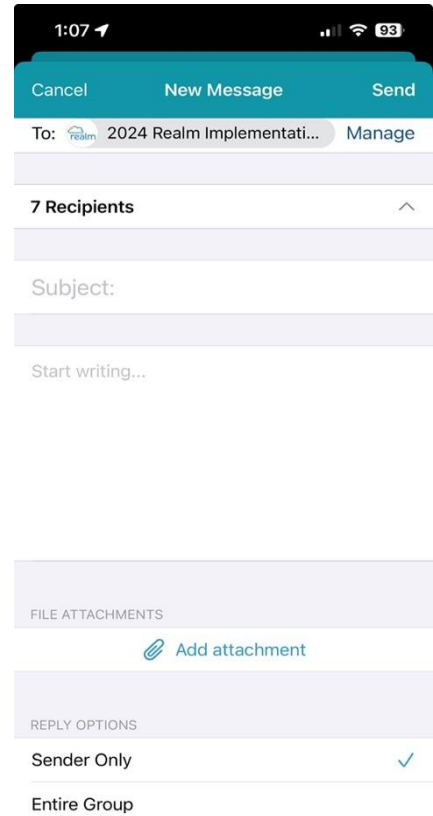
4. Choose a group that you want to message. (If you are a Group Leader, you will have the option to “Manage” the recipients and select a subset of the group members.)
5. Write a subject line, content of message, and attach any files you want with the message.
6. Remember to select at the bottom whether you want replies to be sent back to the sender only or the entire group.
7. Hit “Send” at the bottom left corner to send your message.

The Chat feature is more like an individual channel for messages than a typical “real-time” chat online. To start a chat requires certain access settings, but anyone can reply and revisit a chat once they have received a message in that channel. If, for some reason, you feel that you need to start a chat channel, contact [Realm@FaithAtFirst.com](mailto:Realm@FaithAtFirst.com).

To archive any communications, click “Edit” in the grey, secondary menu bar. This will allow you to select messages to remove from your list. (To view archived messages, select the down arrow next to “Recent” and select “Archived”.)

### To Collaborate with the Members of Your Groups:

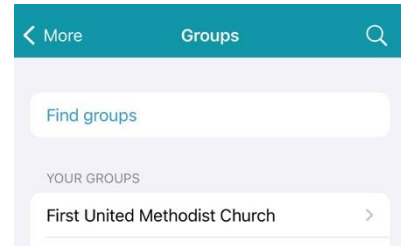
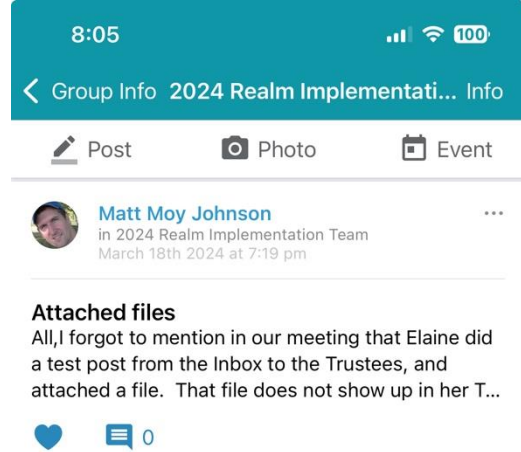
1. Click on the three dots in the bottom right corner of the app.
2. Select “Groups” and then pick the group you want to work with.
3. You will see the thumbnail photos of the group’s participants at the top and a list of the group leaders at the bottom. Clicking on the arrow to the right leads you to each individual’s directory entry.
4. In between the pictures, you will see the option to access:
  - a. the group’s news feed,
  - b. the group’s files, and
  - c. group’s inbox and newsfeed settings.
5. When you select “News” you will see options to post to the newsfeed, upload photos, and schedule events.



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- a. Posting to the news feed works the same way as composing a message in your inbox, but you can pin it to the top of the group feed to highlight it. Posts and attachments to posts here go in the group’s archive. This means that if someone new is added to the group, they can still access that information. Inbox messages stay with you individually.
  - b. Uploading photos is straightforward. After selecting “Post Photo” you will be prompted to “Take” or “Choose” photo(s).
  - c. Creating an event happens in this section as well. Click on “Event”, add the requisite information, and select “Post” in the upper righthand corner.
6. When you select “Files” you will see a list of files that were attached to any posts by the group members. The files are presented in reverse chronological order, i.e., the newest is on top. Click on any file to see it or download it.
  7. “Settings” are managed by the Group Leader and the System Administrator.
  8. Note that you can also search for other groups of interest. On the Groups screen at the top, you can select “Find groups” and navigate through the options or use the search icon to enter a keyword. (This will be fully populated by the end of the 2024 Implementation.)



*Note that Group Leaders have additional options not described here.*

*(These are explained in the section “Instructions for Group Leaders”, below.)*

### To Register or Check-in for Events

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1. Click on the “Events” icon at the bottom of the app.
2. Select the tab with “All Events”.
3. To register for an event, click on the name of the event.
4. You will see all the information describing the event, including the event contact. If registration is available, you will see a calendar icon with “Register by...” next to it. Click on the link.
5. Scroll down to the check box to indicate that you will be attending the event.
6. Select the Registration Type (if a waitlist is available).
7. Click “Next”, review your entries, and then click “Register” when you are done.
8. At the event, to check-in, click the 3 dots on the bottom right of the app, select “Check-In” and proceed from there.
9. To find a particular event or type of event of interest, you can search and/or filter the events you see; access these options at the top of this screen.



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### Additional Instructions for Users Who are Group Leaders

Group Leaders will find a few additional options in Groups section of the app. In addition to the information above, you will see “Send Communication” and “Mark Attendance”.

If you select “Send Communication” you will see that you can do the same things as described above, i.e., when you select “News” you will see options to post to the newsfeed, upload photos, and schedule events. However, you will also see the option to “Start a Chat”.

Chat does two things. It allows you to message specific people in your group, although people may find having another communication channel confusing. These communications stay outside of the group’s newsfeed as well.

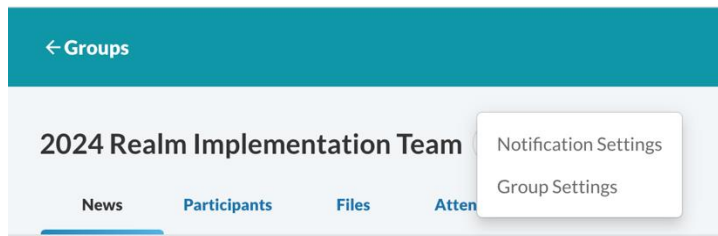
While most First Church members will be able to simply use the app, Group Leaders may find it more convenient to log in to the website. The functions in the app are all available on the website, although the interface is different. Note that you will want to be in the “Connect” section of the website. (The “Realm” side is really for the church staff.). Here you can perform some functions that you might want to do for your group.

#### To Add or Remove People from the Group:

1. Navigate to “Groups” in the lefthand menu of Connect and pick the group you are working with.
2. Select the “Participants” tab.
3. Click on “Manage Participants”.
4. Select the button “+ Add Person” and follow the directions.
5. Removing someone from the group can be done from this screen by selecting the three dots to the right of their name and clicking on “Remove from Group”.

#### To Change Group Settings:

1. Navigate to “Groups” in the lefthand menu of Connect and pick the group you are working with. What you see is the group’s “home screen”.
2. To the right of the group’s name, you will see three dots (of course!). When you click on them, you will have the option to change “Notification Settings” and “Group Settings.”
3. Notification settings determine how your group members learn about changes to their inbox and the group’s newsfeed.



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4. Group settings have more options to edit, but they are all on the same page. The first two options will be most of interest (but look at all of them to understand what the options are):
  - a. “Basics” is where you name the group and create a short description of it.
  - b. “Group Leaders” allows you to add people who you want to have Group Leader permissions.

### To Learn More:

On the group’s home screen, you’ll notice lightbulb and note icons to the right. If you click on “Learn More” you will be directed to the Group Leader Guide. It can also be accessed directly at:

<https://help.acst.com/en/realm/guides/leaders/group-leader-guide>.

You can also contact the First Church System Administrator at: [Realm@FaithAtFirst.com](mailto:Realm@FaithAtFirst.com) for additional assistance and training.



Need help getting started?

As a Group Leader, you can use Realm to communicate with, manage, and equip your group for ministry.

[Learn More](#)

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