FREQUENT ACTIONS BY LEADERS IN REALM

Realm Tips for Group Leaders*

*Note these actions are only available to people designated as group leaders. If you need to add additional group leaders you will need to:

1. Locate the group and open its record.
2. On the group's main page, click the Participants tab.
3. Click ••• next to the member's name, and select Edit.
4. Select a Participant Type of Leader.
5. Click Save.

Record Group Attendance

Mark attendance for past events from the Events tab.

You can mark attendance for an event on the Upcoming Events tab four hours before it begins.

1. Locate the group.
2. On the Events tab, click Upcoming Events and change it to Past Events.
3. Next to the event, click ••• then click Mark Attendance.
4. Select the check box to the left of each group member who attended the meeting. If it is both an in-person and virtual meeting, select whether the group member attended in-person or virtually.
5. Click Add Person to add new members or guests to the group roster.
6. To search for a specific person, click 🔍 then begin entering the name of the person you want. The list filters automatically.

Message Your Group

You can send a message to your group.

Like writing an email, you can send a message to everyone, or just certain people, in your group. You determine who receives replies from your message when you create it. So, if you want to start a group discussion through replies, or just send an announcement with replies disabled, you can do that.

1. Click Community > Communications > Inbox.
2. To create a new message, click the Compose button.
3. Select the group you want to message.
4. If your group has less than 100 members, you can choose to message specific individuals.

   Click Message specific people and click ✕ next to the names of the people you want to remove from the message.
5. Enter the message subject and body.
6. To attach a file to your message, click Attach files, then select the files you want to include.

7. If your group has text messaging enabled, and at least one member has opted in to receiving texts, you can preview the text that group members receive. To change this message, click Customize, then enter the message you want to send. You can also remove the link in the text by clearing Include link in text.
8. Select how members can reply to your message.
    o Sender Only— Members can only reply to you, and no one else will see the reply.
    o Entire Group— When a member replies, the whole group can see it and respond to the reply.
    o Disabled— No one can reply to this message.
9. Click Send.

Adding/Removing Group Members

Add someone to a group.

1. Click Community > Groups.
2. Select the group from the drop-down menu.
3. Click the Participants tab, then click Manage Participants.
4. To add a member, click + Add Person, enter their name in the text box, and click Add.

Remove someone from a group

1. Click Community > Groups.
2. Select the group from the drop-down menu.
3. Click the Participants tab, then click Manage Participants.
4. To remove a member, click ••• then select Remove from Group, choose keep the person's group history, and click OK.

File Posting

Group leaders can post files to any group they lead.

Files cannot exceed 20MB.

1. [Locate the group](#).
2. On the News tab, click Send Communication.
3. Under Post to Newsfeed, click Create a Post.
4. Title your post and add the content.
5. Click Attach Files at the bottom of the post.
6. Click Post.
7. After files are posted to the Newsfeed, they can also be found under the Files tab in the group.

Mark Volunteer Attendance as a Leader

Mark attendance for volunteers on a team as a leader.

Permissions Required

Only available to team leaders.

1. Click Community > Serving.
2. Click the team's name to view the leader dashboard.
3. Select the event to mark.
   - To mark attendance for an event in the Happening Today section, click Mark Attendance next to the event's name. This only displays if the event is happening within the next four hours.
   - To mark attendance for a past event, click View and mark attendance in the Past Attendance section, then click the name of the event.
4. To remove someone from the attendance roster, click ••• and select Remove from the drop-down list.
5. Select the box next to a volunteer's name to mark that volunteer individually. You can also select the top box to select all volunteers at once.
6. To finish marking attendance, click Save Markings.

Message Your Team

You can send a message to your team.

Similar to writing an email, you can send a message to everyone, or just certain people, in your team. You determine who receives replies from your message when you create it. So, if you want to start a team discussion, or just send an announcement with replies disabled, you can do that.

1. Click Community > Serving.
2. Click the name of your team, then click the News tab.
3. Click Send Communication.
4. Click Compose Your Message.
5. If your team has less than 100 volunteers, you can choose to message specific individuals.

   Click Message specific people and click ✕ next to the names of the people you want to remove from the message.
6. Enter the message subject and body.
7. To attach a file to your message, click Attach files, then choose the files you want to include.
8. If your team has text messaging enabled, and at least one volunteer has opted in to receiving texts, you can preview the text that volunteers receive. To change this message, click Customize, then enter the message you want to send. You can also remove the link in the text by clearing Include link in text.
9. Select how volunteers can reply to your message.
   - Sender Only— Volunteers can only reply to you, and no one else will see the reply.
   - Entire Team— When a volunteer replies, everyone can see it and respond to the reply.
   - Disabled— No one can reply to this message.
10. Click Send.