



# Unity Connects Quick Start Guide

*And Conditions for Use*

September 29, 2018



# Unity Connects: An Online Tool for Connecting at Unity

Welcome to Unity Connects, a powerful online community for making connections and enriching your relationships at Unity of Walnut Creek.

When you log in to Unity Connects, you can view your profile information, groups you have joined, positions you hold, your giving record (accessible only to you) and events you can attend. In addition, you can update your contact information, add your profile picture and much more.

Most importantly, you can stay in touch with friends, group members, teachers and fellow volunteers, deepening your relationships with those who are sharing your spiritual journey at Unity of Walnut Creek.

To log in, go to [www.unityconnects.com](http://www.unityconnects.com) and enter your username and password. You can also click on the links for PDA and iPhone logins. Note: If you do not yet have a username for Unity Connects, go to [www.unityconnects.com](http://www.unityconnects.com) and click the **Sign Up** link.

We hope you enjoy using Unity Connects!

## Using Unity Connects

This guide gives tips for using Unity Connects and includes the conditions for use (see page 10). One of the best ways to learn about Unity Connects is to log in and look around.

Here's a quick list of things to do to get the most from Unity Connects:

- **Update your profile.** Easily manage your contact and personal information and privacy settings.
- **View your donations** and payments to Unity.
- **Join groups.** Search for interest groups, classes, workshops, retreats and events that are of interest to you – and stay current with all of their happenings. Leaders and teachers can notify you directly of date changes, volunteer needs, etc.
- **Send and receive messages** to your teachers, group members and fellow volunteers.
- **Keep track of upcoming events** at Unity of Walnut Creek in general and for your groups specifically. You can choose to be emailed or texted automatically with event notifications for groups to which you belong.
- **Find causes close to your heart** and opportunities to use your gifts in sacred service to Unity and in the community.
- **If you are a group leader,** use Unity Connects to reserve rooms and facilities, communicate with group members and provide information to people who are looking for a group to join or a volunteer position to fill. For more information send an email to [office@unityofwalnutcreek.org](mailto:office@unityofwalnutcreek.org).

This guide covers the basics of how to use Unity Connects. There is much more to this powerful tool, so explore, make connections and remember to **have fun!**

## Updating Your Profile

Your basic information was added to Unity Connects when your account was set up.

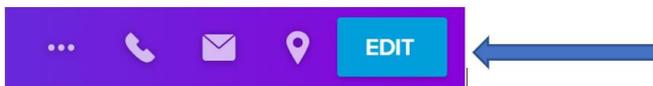
1. **Add a picture** of yourself by clicking on the camera icon within the circle and then click Replace. Select a photo of yourself from a file on your computer and click Add.

To add a family or background photo, click the camera icon in the upper left. Select a photo from a file on your computer and click Add.

2. To **update your profile information**, click on the picture icon in the top right corner.



Click the Edit button.



- Directly below your name will be a plus sign.

First Name                      Last Name

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→ +

Click the plus sign and Prefix from the dropdown list to add a title (e.g., Rev., Dr.) or prefix (Mr., Mrs., etc.).

Click the plus sign and Legal First Name from the dropdown list to note a legal first name, allowing you to use the First Name field for the name or nickname that most people know you by.

Apply last name to family

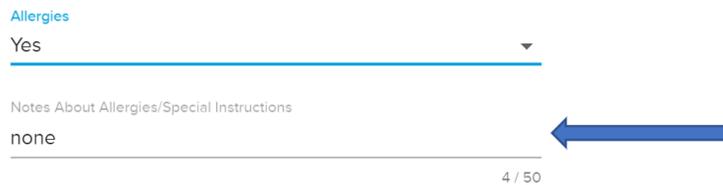
→ Prefix  
→ Suffix  
→ Middle Name  
→ Legal First Name

- Use the scroll bar on the Edit Profile popup to **ensure your phone number(s) and mailing address are correct.**
- Continue scrolling to complete your profile. Pay particular attention to:

- **Listing allergies** (e.g., medications, foods) in case you have a medical emergency while at Unity. To list them, click on the arrow next to Allergies.



Click Yes from the drop down list. A Notes field will appear. List the items you are allergic to in the Notes field.



- **Entering your Emergency Contact Name and Number.**

Emergency Contact Name

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Emergency Contact Number

+

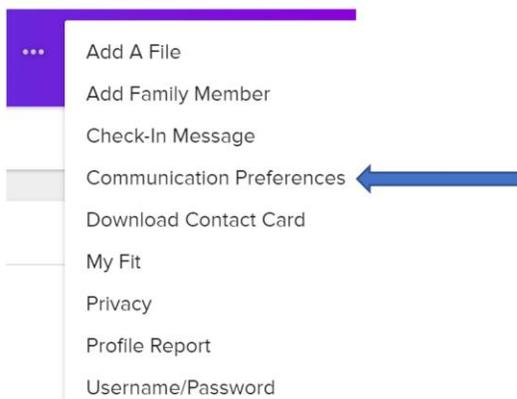
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- After updating your profile information, click Save.

3. To **set or change your communication preferences**, click on the three dots to the left of the Edit button.



Select **Communication Preferences** from the dropdown.

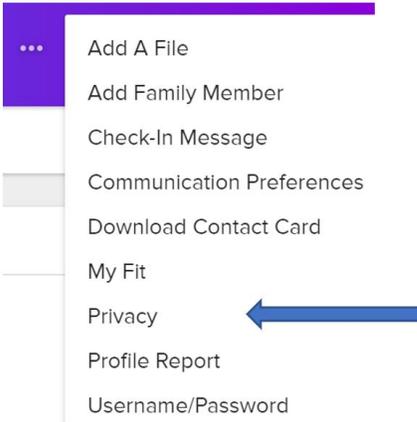


For each group you are a member of, indicate if you want to receive communications. You can choose to receive messages by email, including a weekly summary of your groups' activities, and comments posted to your groups' message boards and/or by text to your cell phone.

4. To **set or update your privacy settings**, click on the three dots to the left of the Edit button.

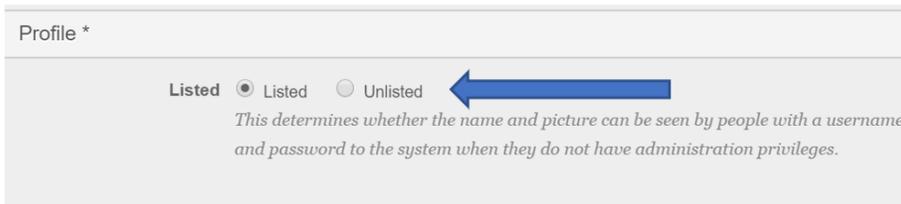


Select Privacy from the dropdown.

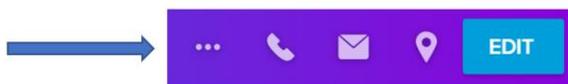


For each of the data listed, you can determine who sees it. Using the ‘Everybody’ option will help make our online community vibrant. See below for how to identify people as friends as well as our conditions for use regarding privacy.

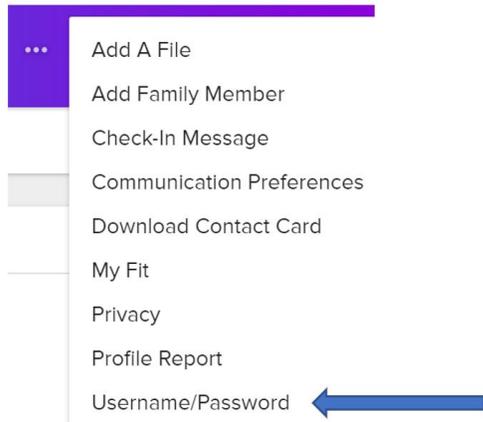
If at any time you decide you don’t want to be part of Unity Connects, you can “unlist” your profile in the Privacy settings and discontinue using Unity Connects.



5. To **change your username and password**, click on the three dots to the left of the Edit button.



Select **Username/Password** from the dropdown.



Enter your new username and/or password. After saving your changes you will be logged out and will need to log back in with your new login information.

6. Still on your Profile page, you can identify others within Unity Connects as members of your family. This is helpful for producing a family giving statement. It is also crucial for children to be identified with their parents/guardians/grandparents.

- To identify family members, click Add Family Member.

Family

ADD FAMILY MEMBER

- Select the family relationship and then start typing the name.
- Select the correct name from the list that will appear. Click Add.

If the name of your family member does not appear, he or she has not joined Unity Connects. Ask them to sign up at [https://unityofwalnutcreek.ccbchurch.com/w\\_sign\\_up.php](https://unityofwalnutcreek.ccbchurch.com/w_sign_up.php).

7. Still on your Profile page, **identify your talents, interests and skills**. This will be helpful for matching volunteer positions with your interests.

- Click on Edit My Fit.

My Fit

EDIT MY FIT

Abilities	2	▼
Passions	3	▼
Spiritual Gifts	2	▼

- Going through each of the tabs Spiritual Gifts, Passions, Abilities and Personality Style, check the boxes that apply to you.

## My Personal Fit Profile

Spiritual Gifts	Passions	Abilities	Personality Style	
Administration				<input type="checkbox"/>
Art				<input type="checkbox"/>
Biking				<input type="checkbox"/>

- Click Save.

## Viewing Your Donations and Payments to Unity

You can view your donations and payments to Unity at any time. You can get a statement for yourself or your family for the date range you specify. (Note that Unity of Walnut Creek does not currently use the Pledges or Repeating Gifts functionality on Unity Connects.)

1. Click Give in the left column.

	Home
	Groups
	People
	Serve
	Give

2. A list of your donations and payments will appear. To run a report, click on the Giving Statement button.

SCHEDULES / HISTORY	PLEDGES
Individual	Family
	Giving Statement 

3. Select whether you want to report to be for you as an individual or for all members of your family designated as such on Unity Connects.
4. Select the date range for the report by using the dropdown under Quick Date Range or by entering custom dates.
5. Click Run Report. You can then print it or download it to save it to your device.

Although donations and payments have been coded as deductible or not deductible within Unity Connects, check with your tax professional to determine which are deductible following current IRS rules.

## Joining Groups

Groups are the backbone of Unity Connects. Events, volunteer opportunities, message boards and most emails all start through groups. Types of groups include:

- Common interest and small groups, such as youth activities or men's and women's groups
- Ongoing and quarterly classes
- Workshops and retreats
- Volunteer opportunities for Unity and the greater community
- Distribution list for Unity's newsletter Centerpoint, including the weekly email version

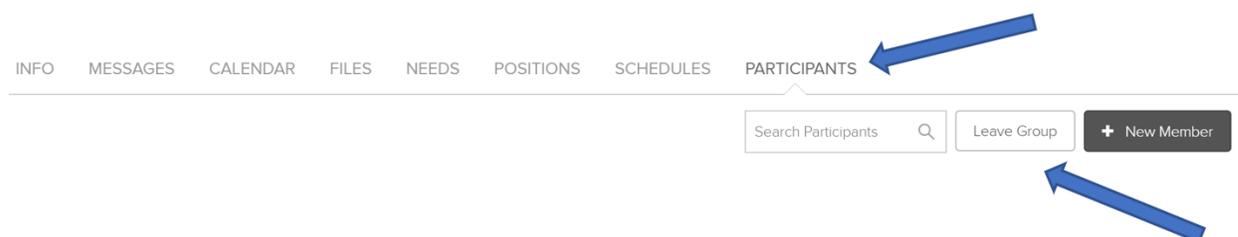
You can see a list of the groups you currently belong to on the Home page, on your profile page and by going to the Groups tab. Click on the group's name to go to the group's home page.

1. To **find a group to join**, click Groups in the left column.



- Type any portion of a group's name in the search box. All groups that include the letters will come up. Click on the name of the group to go to its home page.
- On the right side of the group's home page, you will see:
  - **Request to join** if approval from the group leader is required to join. Click **Request to Join**; an email will be sent to the group leader with a notification of your request.
  - **Join group** if approval is not required. Click **Join group** and you will be added to the member list.

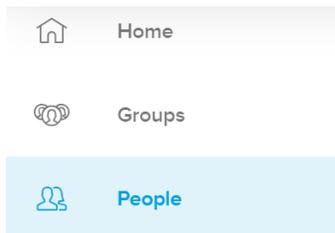
2. You can **remove yourself from a group** at any time. Go to the group's homepage and on the Participants tab, click Leave Group.



## Sending Messages

It's easy to communicate with your friends and group members using Unity Connects.

1. To **send an email to an individual**, select People from the left column.



- Begin typing the person's name in the search box and select the correct one from the list that will appear.
- In the Contact Info group, hover over the Email section and three dots will appear. Click on the three dots and then Send Email. Note: Each person can choose not to allow emails to be sent to them.

If the person is a member of a group that you are also a member in, you can also send an email by going to the Participants tab within the group and clicking "Send email" for that individual.

2. To **send an email the members or leaders of a group**, on the group's home page, go to the Message tab and click New Message. You can then choose to send the message to all members, the leaders, or specific members in the Send message to... dropdown.

**Note:** At all times, Unity Connects is to be used only for Unity purposes. It is not to be used for solicitations for business, promotional or personal purposes.

## Keeping Track of Events

Keeping up with the hundreds of meetings, classes, workshops and events held at Unity each year is made simple by Unity Connects.

On the Calendar tab, you can toggle between your personal calendar, your family's calendar and the Unity-wide calendar.

- On your calendar, you will find events being hosted by groups to which you belong and events you have registered for.
- On the church-wide calendar, you will find events hosted by groups to which you do not belong that are open to everyone.

1. To **see more information about an event**:

- On the Calendar, click the name of the event and a pop up will appear with all of the details.
- You can also find the details page by going to a group's home page and clicking on the **Calendar** tab, then the specific event from the calendar.

2. To **RSVP for an event** from within Unity Connects, go to the event's details page and click Yes, Maybe or No.

RSVP

Yes	Maybe	No
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If you have questions about an event, contact the organizer by clicking **Email** next to the event organizer's name on the event details page.

## Finding Causes Close to Your Heart

Finding the right volunteer positions is easy with Unity Connects, which can match your skills, talents and interests with volunteer positions that will fill you with satisfaction. Volunteering can help you deepen friendships, develop new skills and grow through sacred service.

There are several ways to find volunteer positions through Unity Connects:

- Join groups that are based on volunteering. To find out more, send an email to [office@unityofwalnutcreek.org](mailto:office@unityofwalnutcreek.org).
- On the Serve page, search for open positions based on criteria you choose or let the system tell you what positions best match your skills, talents and interests, based on information in your profile. Note: Unity of Walnut creek is not currently using this functionality.

## Conditions for Use

At all times, Unity Connects is to be used only for Unity purposes. It is not to be used for solicitations for business, promotional or personal purposes.

Unity of Walnut Creek reserves the right to remove your access to Unity Connects at any time.

By becoming a member of Unity Connects, you agree to the following rules of use:

- Unity Connects is intended for personal and ministry use only as they relate to the purpose of Unity of Walnut Creek. It is not for solicitation of any kind. Do not use it for business purposes or for ministry, groups, etc., outside of Unity of Walnut Creek. Sending unsolicited information to personal emails or in group messages that has not been requested is considered spam.
- Protect the privacy of members by not giving their phone numbers or other information to anyone who is not a member of Unity Connects. If you would like the phone number of someone whose profile on Unity Connects is "unlisted", please ask that person directly. Unity of Walnut Creek cannot give out this information without prior consent. We use and maintain private information with great integrity.
- Do not send emails that are not necessary and requested (e.g., jokes, stories, petitions, etc.). Use Unity Connects with care and courtesy. Even if something is interesting, funny or important, do not send unsolicited communication. Do not add members to email lists outside of Unity Connects without prior consent.
- In discussions on Unity Connects, treat everyone, including other groups, churches or organizations, with respect and do not solicit members for outside groups or organizations.
- Keep online discussions and emails personal, positive and productive. Discussions will be monitored.
- Although donations and payments to Unity of Walnut Creek have been coded as deductible or not deductible within Unity Connects, check with a tax professional to determine which are deductible on your taxes following current IRS rules.
- Unity Connects members who become inactive at Unity of Walnut Creek or who do not follow these guidelines and/or abuse Unity Connects will have their login access blocked.
- Inform the Unity Connects administrator of any problems so a resolution can be found by sending an email to [office@unityofwalnutcreek.org](mailto:office@unityofwalnutcreek.org).

## Additional Help

To learn more about Unity Connects, access the Help Center by clicking the **Help and Support** icon in the top right of any page.

To ask a Unity staff member a question about the online community, send an email to [office@unityofwalnutcreek.org](mailto:office@unityofwalnutcreek.org).