REALM Automated Giving Instructions

Updated September 2019

Here's a how-to for setting up automated giving through our church database, REALM, <u>www.onrealm.org</u>. If you have trouble with the technology on your own, you can contact Kit Dunbar (*kdunbar@facb.org*). <u>These instructions</u> <u>have been developed for both new users and existing users. Please refer to appropriate section</u>. Please be assured that REALM has strict security protocols to protect your personal and financial info.

Training will be offered!

Kit Dunbar, Louise Halsey, and Amy Hiestand will be in the Hall of Entrance after worship on Sunday, September 22nd and Sunday, September 29th, ready to sherpa you through the sign-up process and to help you with any issues you may be having with the REALM program.

Ok, let's go!

NEW USERS/FIRST-TIMERS TO REALM:

STEP 1: The church has already created a profile for each of its members and community within the REALM database, so the good news is that you already have a profile! **However, if you have never logged in to your profile, the first step is to contact Louise Halsey** at *lhalsey@fcch.org* or Kit Dunbar at *kdunbar@fccb.org* to get your email invitation to log in to REALM.

STEP 2: After you receive your email invitation from REALM, you will click on the link in your email to confirm your email and create a password. Then you will receive a second email with a link to log in. You may be asked to verify your phone and birth date. You have the opportunity to upload a photo for your profile. You can change your privacy settings to "Everyone in our church" by clicking on the "Manage Privacy" button (this allows your contact info to be shared with other church members who are also registered, effectively creating an accurate, up to the minute church directory).

Now you are ready to set up automated payments! The next instructions are for both new and existing users of REALM for automated giving.

NEW USERS AND EXISTING USERS TO REALM:

STEP 3: Set up your Giving Level and Payment Mechanism. When you sign in to your REALM account, you'll see this opening page.

1. Click on "Giving" in the left-hand navigation field.

realm	News
News	200
Messages	
Events	Your feed doesn't have any activity yet. Consider posting a
Giving	welcome message to get things started. Start something.
Groups ~	
Directory	
	Next click on "Giving"

2. On the "Giving" page, click on "+Pledge" to get to "Pledge Now" page.

firstchurch	Giving	
Communications v Events Giving	+ Give + Pledge Giving Scheduled T C	GIVING NUMBER None Manage Payment Methods
Groups ~ Directory	No giving history for the selected filters Individual gifts to your church appear here. You can review and print them as receipts at any time.	

3. On the "Pledge Now" page, you can enter **how much you want to give** in the first box after "I pledge" and the **frequency of your sustaining gift** in the dropdown menu found after "to be given" (e.g. "As can" "once a week" "once a month" "annually"). You will also select the period of time for your Sustaining Gift.

first church	Happy Giver's Giving > Pledge Now
Communications ~ Events	I pledge 0.00 Sustaining Gift - 01/01/2019 until V to be given As can V
Giving Groups ~	from 08/23/2019 iii until 12/31/2019 iii for a total pledge of \$0.00 Save Pledge Save & Set Up Online Gift or Cancel
Directory	

<u>New Users of REALM</u>: In the dropdown menu for Sustaining Gift, you will select one of the two options for the giving period – "Sustained Gift 01/01/2019-12/31/2019" or "Sustained Gift 01/01/2020-12/31/2020."

- By selecting 2019, you are choosing to become a sustained giver to First Church Berkeley for the remainder of this current year.
- By selecting 2020, you are choosing to become a sustained giver to First Church Berkeley to be counted towards the 2020 calendar year pledging commitments.

Existing Sustained Givers through REALM in 2019: Since you are already entered into the system for 2019, the "Pledge Now" page view will only show the 2020 calendar year period (see view on next page).

FILSTCHUICH	Pledge Now
Communications v Events Giving Groups v	I pledge 75.00 to Sustaining Gift - 01/01/2020 until 12/31/2020 to be given Once a week from 01/01/2020 until 12/31/2020 for a total pledge of \$3,900.00 Save Pledge Save & Set Up Online Gift or Cancel
Directory	

REALM will calculate your total sustaining gift for your verification.

Example: Sustaining Gift of \$100 given for the 1/1/2020-12/31/2020 period with "As Can" frequency totals to annual sustaining gift/pledge of \$100.

firstchurch	Happy Giver's Giving> Pledge Now	
Communications 👻	I pledge 100.00 to Sustaining Gift - 01/01/2020 until Y to be given	~
Events	from 01/01/2020 iiii until 12/31/2020 iiii for a total pledge of \$100.00 As can	_
Giving	Save Pledge Save & Set Up Online Gift or Cancel Every two weeks	
Groups 👻	Once a month	
Directory	Twice a month	
	Annually	

Example: Sustaining Gift of \$100 given during the 1/1/2020-12/31/2020 period on a once weekly basis totals to annual sustaining gift of \$5,200.

firstchurch	Happy Giver's Giving > Pledge Now
Communications v Events Giving Groups v Directory	I pledge 100.00 to Sustaining Gift - 01/01/2020 until v to be given Once a week v from 01/01/2020 until 12/31/2020 for a total pledge of \$5,200.00 Save Pledge Save & Set Up Online Gift r Cancel

Click on "Save & Set Up Online Gift" when you are done completing the page.

4. Clicking on "Save & Set Up Online Gift" takes you to the "Give Now" page where you can set up when your donations start, the source of the funds (credit, debit card, checking or savings account) and a box to click if you'd like to add a donation to offset the processing fee. Be sure to click the blue "Give" button at the bottom of the page when you are done entering the information.

firstchurch	Giving - Give Now	
Communications v Events Giving Groups v Directory	GIVING DETAILS Give* [200.00 to Sustaining Gift ~ Memo + Give to an additional fund Frequency* Once a week ~ on Fridays ~ Starting* 01/01/2020 @ until Cancel ~ Cocors every week on Friday beginning January 3, 2020.	
Support Privacy Terms of Use	This gift will complete your pledge to Sustaining Gift PAYMENT INFORMATION Account Number* Account Type Credit/Debit Card Account Number* Expiration Date* V Name on card* Happy Giver Billing Address Line 1* 2345 Channing Way Billing Address Line 2	
upport Privacy Terms of Use opright © 2019 ACS Technologies.	Billing City* Berkeley Billing State* California California ✓ Billing Postal Code* 94704 Email Address* just.kit 10@gmail.com Processing costs Contribute an extra \$2.00 per gift to help offset processing costs. Give \$100.00 rr Cancel	

TROUBLE SHOOTING

- 1. Spam blockers on your email may block your email invitation to REALM. Be sure to look for the email address *notifications@onrealmmail.org* in your spam folder.
- 2. REALM's web address is <u>www.onrealm.org</u> for future logins.
- 3. If you don't see your REALM invitation in your email inbox, please email Louise Halsey at lhalsey@fccb.org to verify your email address and receive a new invitation.

MOBILE APP ACCESS

For mobile access, after you have signed up for REALM, you can download the mobile app on your cell phone (called Connect-Our Church Community) for access to your giving information, congregational contact information, and other resources.

Thank you for your generous support of our church community! Because of your participation, our church can do so much good in the world!