First Church Berkeley, UCC
REALM Automated Giving Instructions
Updated April 2020

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

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 may already have a profile! **However, if you have never logged in to your profile, the first step is to contact Louise Halsey** at *lhalsey@fccb.org* or Kit Dunbar at *kdunbar@fccb.org* to get your email invitation to log in to REALM.
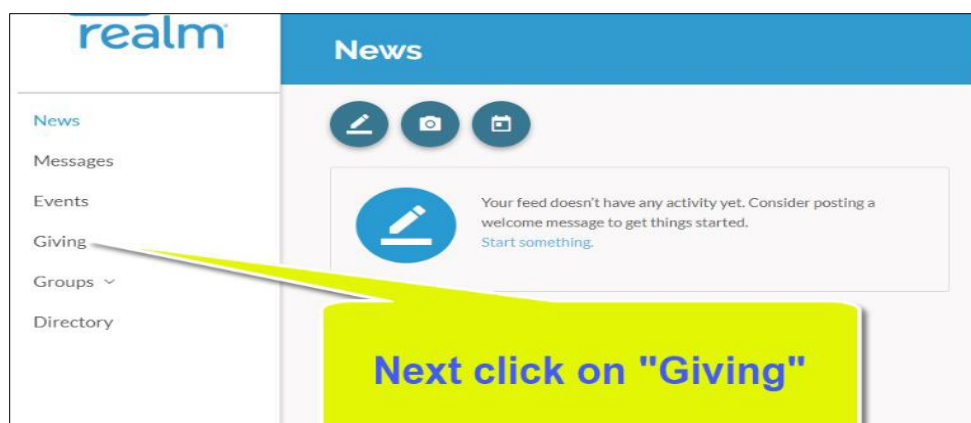
STEP 2: After you receive your email invitation from REALM, you will click on the link in your email to confirm your email and create a password. Then you will receive a second email with a link to log in. You may be asked to verify your phone and birth date. You have the opportunity to upload a photo 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.
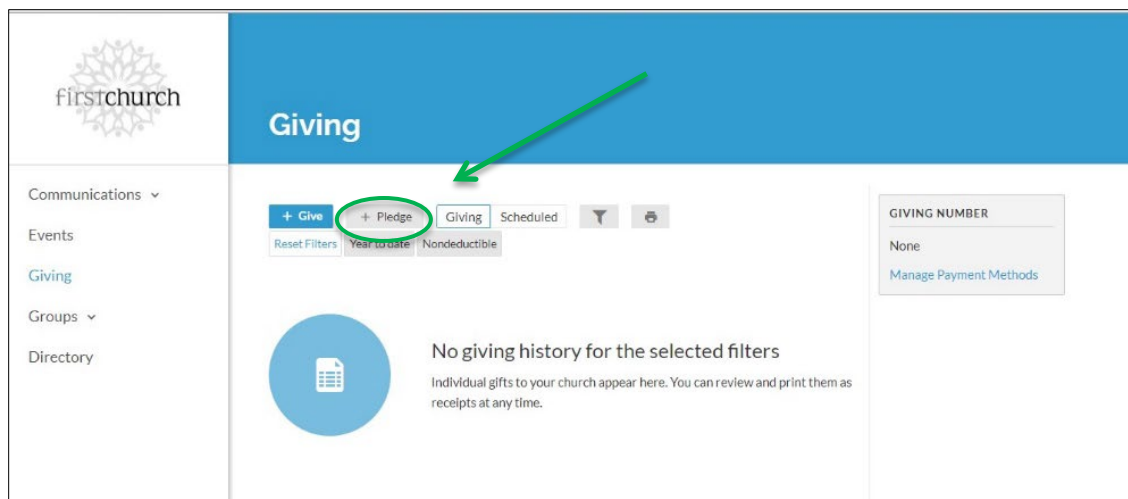
NEW USERS AND EXISTING USERS TO REALM:

STEP 3: Set up your Giving Level and Payment Mechanism. When you sign in to your REALM account, you'll see this opening page.
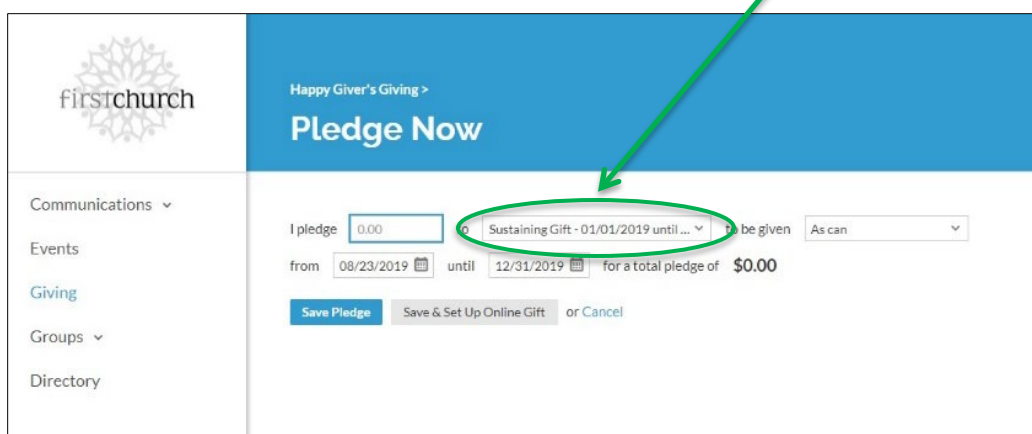
1. Click on "**Giving**" in the left-hand navigation field.

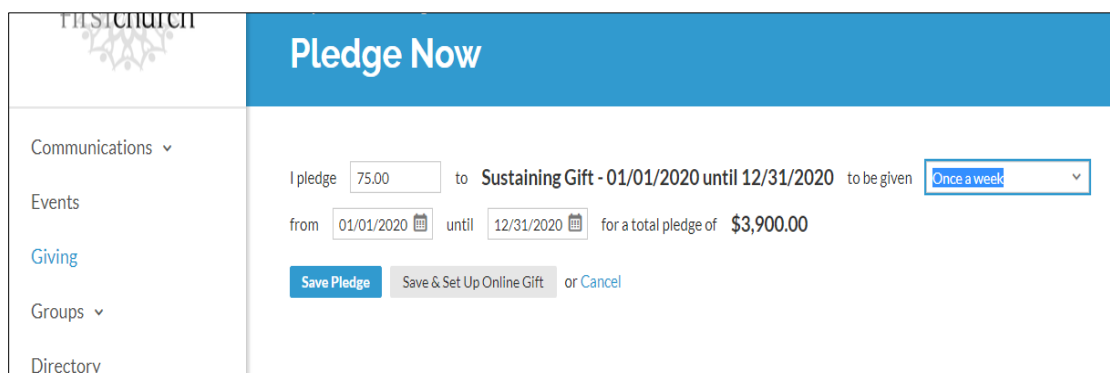2. On the "Giving" page, click on "**+Pledge**" to get to "Pledge Now" page.

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.

New Users of REALM: In the dropdown menu for Sustaining Gift, select your preferred giving period – e.g. "Sustained Gift 01/01/2020-12/31/2020."
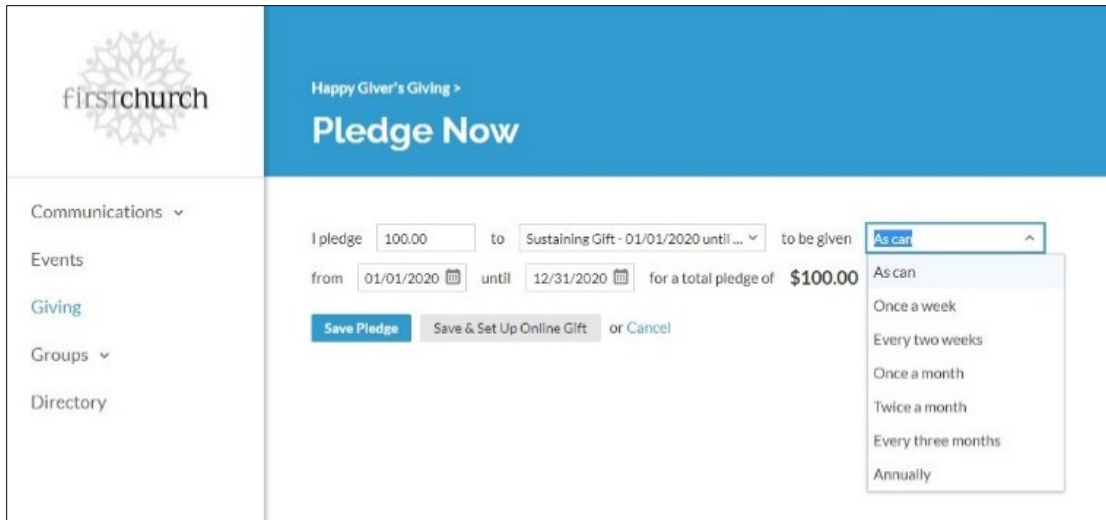➢ By selecting 2020, you are choosing to become a sustained giver to First Church Berkeley to be counted towards the 2020 calendar year pledging commitments.

Existing Sustained Givers through REALM: Since you are already entered into the system for the current year, the "Pledge Now" page view will only show the upcoming calendar year period (see view on next page).
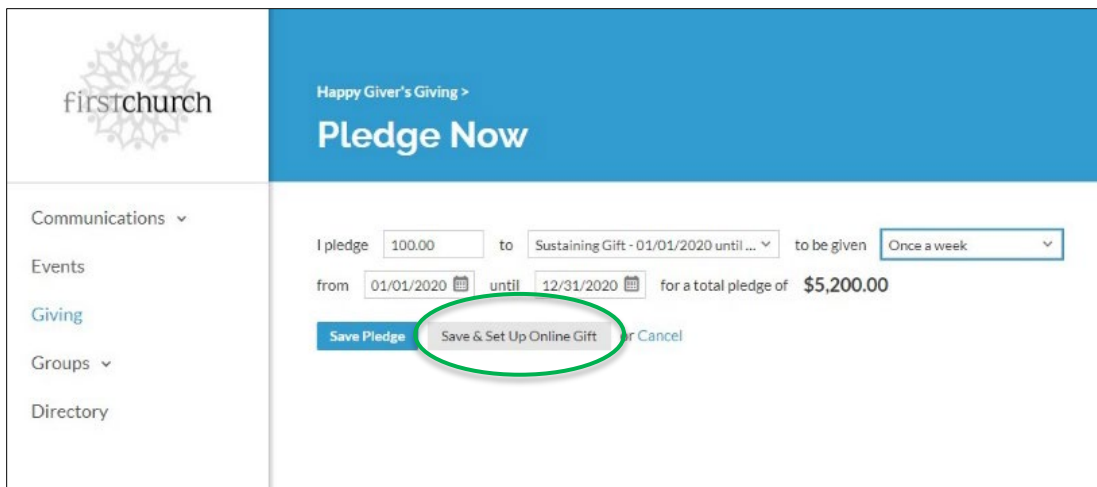
REALM will calculate your total sustaining gift for your verification.

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.

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.

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.**

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 www.onrealm.org 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!