

First Church Berkeley, UCC

REALM Automated Giving Instructions

Updated September 2022

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@fcb.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 OF 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@fcb.org or Kit Dunbar at kdunbar@fcb.org to get your email invitation to log in to REALM.

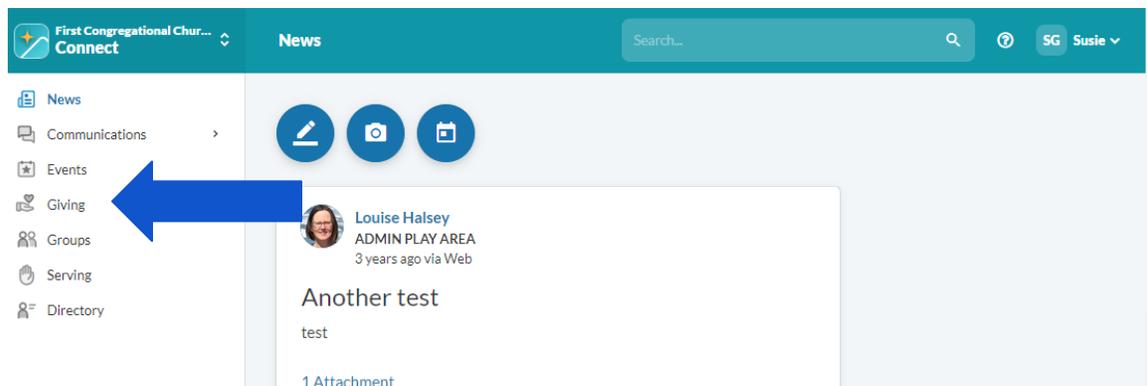
STEP 2: After you receive your email invitation from REALM, you will click on the link in your email to confirm your email and create a password. Then you will receive a second email with a link to log in. You may be asked to verify your phone and birth date. You have the opportunity to upload a photo 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.

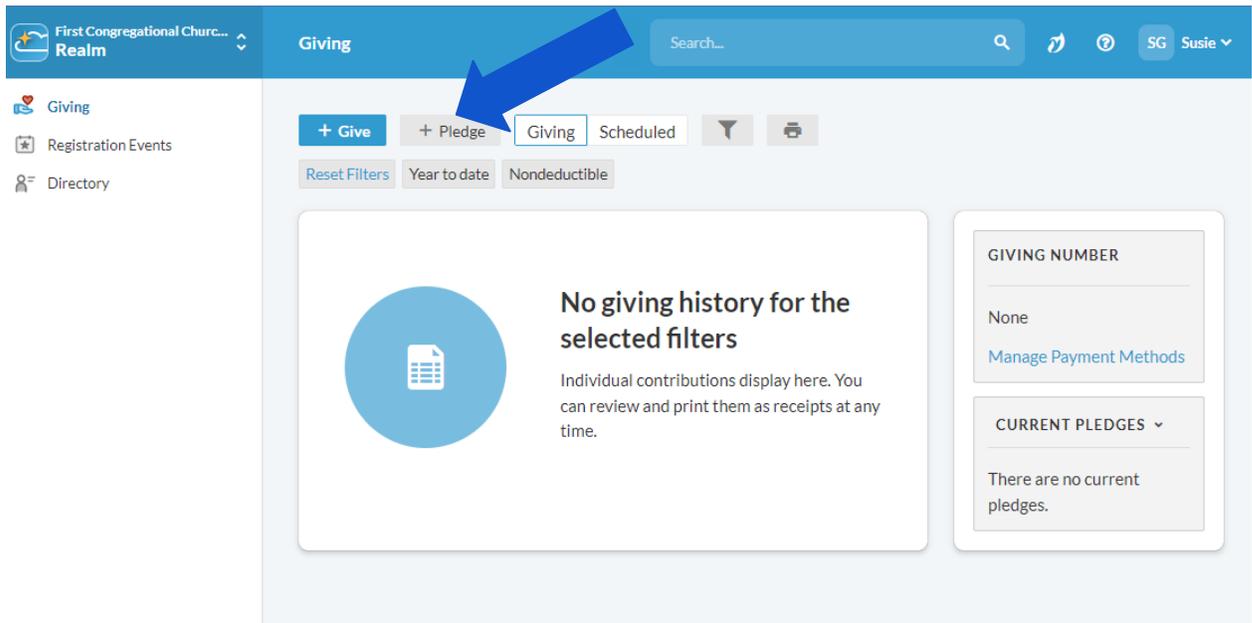
NEW USERS AND EXISTING USERS TO REALM:

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

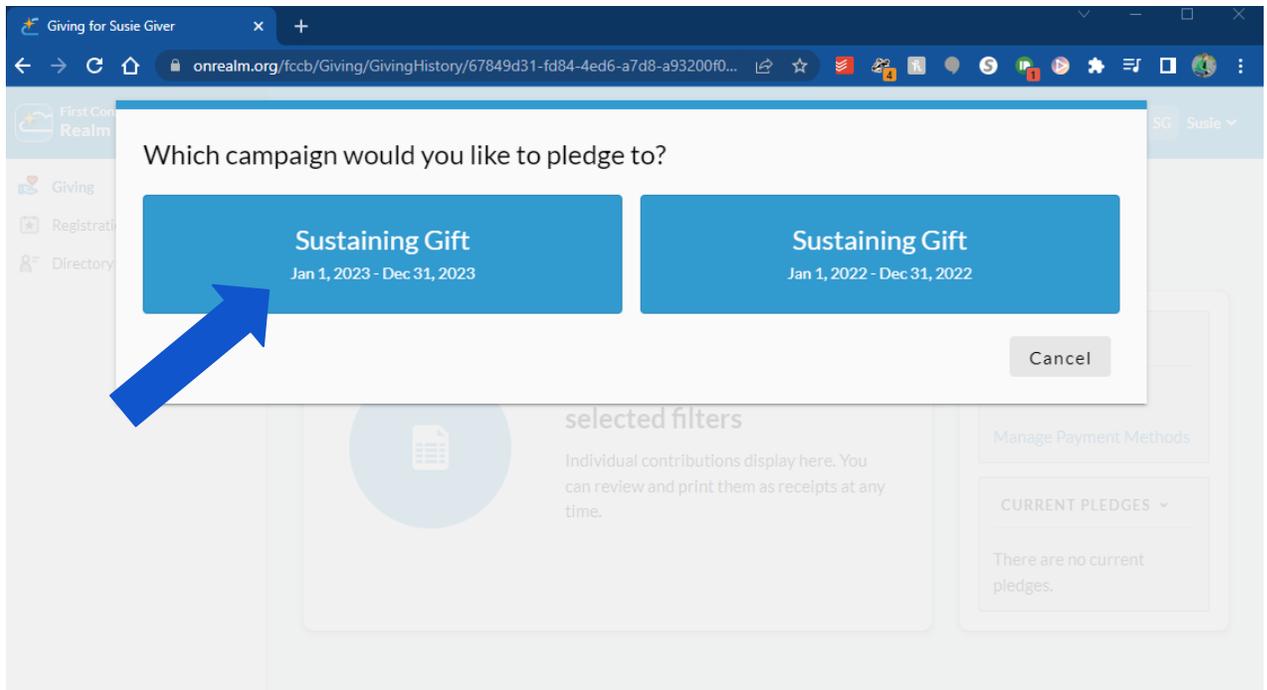
1. Click on “Giving” in the left-hand navigation list.



2. On the “Giving” page, click on “+Pledge” to add your pledged sustaining gift.



3. Choose which year you are pledging for (probably 2023). You are welcome to add a pledge for a sustaining gift for the current financial year as well. Just repeat the instructions twice!



4. On the “Pledge Now” page, you can enter **how much you want to give** under “Amount” and the **frequency of your sustaining gift** by clicking “Set a Schedule” and choosing from the options which include once a week, every two weeks, once a month, twice a month, every three months, or annually. You will also select the period of time for your Sustaining Gift. You’ll note that it automatically calculates the total gift for the year for your verification. Click “save pledge” to register your plan.

Note: “As Can” means that you will set up gifts as you are able throughout the year on an irregular schedule.

Sustaining Gift
First Congregational Church of Berkeley
Our annual pledge helps to support our mission, our ministry, and all we do together. Thank you for being a Sustaining Giver.

How much would you like to pledge?

Amount
\$2,000.00

AS CAN SET A SCHEDULE

ONCE A WEEK EVERY 2 WEEKS **ONCE A MONTH** TWICE A MONTH EVERY 3 MONTHS ANNUALLY

Start Date: 1/1/2023 End Date: 12/31/2023

SUMMARY	\$2,000.00 once a month	\$24,000.00 total pledge
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Cancel **Save Pledge**

5. Clicking on “**Save Pledge**” will show you a screen thanking you for your pledge.

Thank you for adding your pledge of \$2,000.00

Frequency: once a month from Jan 1 - Dec 31, 2023
Total Pledge: \$24,000.00

Thank you for your generous support! If you have any questions about your pledge, please contact Kit Dunbar at kdunbar@fccb.org or 510-225-6814.
You will receive an email confirmation for this pledge.

Finish

Before you go...

Add an online gift to fulfill this pledge.

Saving a pledge does not automatically set up online giving, however. If you wish to set up online giving, check the box at the bottom of the screen, which will take you to the giving screen. The giving screen will be auto-filled with the information from your pledge, including an automatic start date of January 1 of next year and an automatic end date of December 31.

How much would you like to give?

Amount: **\$2,000.00** Fund: Sustaining Gift

+ Another Fund

GIVE ONCE | GIVE MULTIPLE TIMES

EVERY WEEK | EVERY 2 WEEKS | **EVERY MONTH** | TWICE A MONTH | EVERY 3 MONTHS

Start date: 1/1/2023

Stop giving after: Date | End date: 12/31/2023

i This will complete your pledge to Sustaining Gift within 01/01/2023 - 12/31/2023

SUMMARY	\$2,000.00 every month	12 gifts scheduled	\$24,000.00 in total gifts
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Cancel | **Continue**

If you wish to adjust anything, you can. For example, if you wish to give on a different frequency, you may adjust the directions. Clicking “Continue” will take you to the “payment method” screen.

How would you like to give, Susie?

CREDIT OR DEBIT BANK ACCOUNT

Account Number

Name On Card
Susie Giver

Expiration Month: 09 Expiration Year: 2022 CVV:

Billing Address 1: 1234 Streets Paved With Gold Lane Billing Address 2:

Billing City: Tithe Town Billing State: California Billing Postal Code: 94704

Contribute an extra \$40.00 per gift to help offset processing costs.

SUMMARY	\$2,000.00 every month	12 gifts scheduled	\$24,000.00 in total gifts
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Back Cancel **Give \$2,000.00**



On that screen, you can set up the source of the funds (credit, debit card, checking or savings account) and choose 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.** It will only begin giving on the start date you indicated in the first screen.

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!-4-