

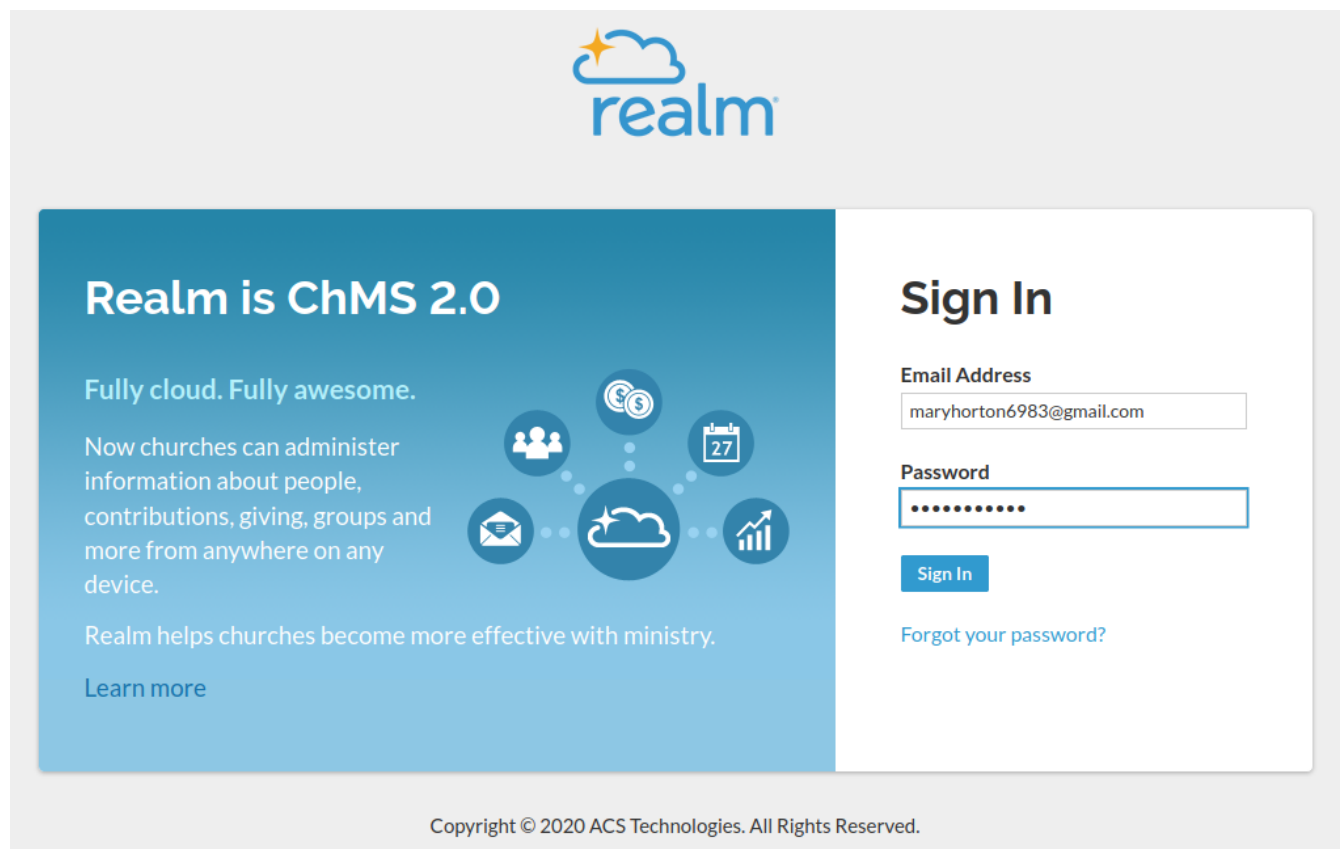
Setting Up Gifts in Realm

Creating a Payment Method in Realm

These are the steps needed to create a payment method within Realm. A “payment method” would be telling Realm what checking, savings or credit/debit card account to withdraw funds from for donations to St. Patrick’s.

Step 1 (Sign In to Realm)

- Go to URL address <https://onrealm.org> on your browser
- Enter your Email Address and Password. If you don’t remember your password, enter just your email address and click on the “Forgot your password?” link and follow instructions.



realm

Realm is ChMS 2.0

Fully cloud. Fully awesome.

Now churches can administer information about people, contributions, giving, groups and more from anywhere on any device.

Realm helps churches become more effective with ministry.

[Learn more](#)

Sign In

Email Address
maryhorton6983@gmail.com

Password
.....

[Sign In](#)

[Forgot your password?](#)

Copyright © 2020 ACS Technologies. All Rights Reserved.

Step 2 (Setup new payment method)

- When you have logged in, you will see your profile information. If it is incorrect you may update it yourself or contact our Church Administrator to update it.
- Click on “Giving” to the right of your picture. May need to click on the drop down box to see “Giving”.
- You should now see a history of the gifts you have given to St. Patrick’s recently.
- Click on the “Manage Payment Methods” link on the right side of the screen to start the process of setting up your payment method.

Payment Methods

+ Add Payment Method



No payment methods

There are currently no saved payment methods.

- Click on “+ Add Payment Method” to get started.
- Fill in the information requested specifying a checking or savings account or Credit/Debit card account. Specifying a checking or savings account will incur no processing fees on St. Patrick’s.
- Click “Save” when finished entering the information.
- Listed on the “Payment Methods” screen should now be your payment method(s). You may have more than one Payment method.
- By clicking on “Close” at the bottom of the screen you will return to your Giving screen.
- At this point you have a Payment method but gifts have been scheduled or made.

Step 3 (Schedule a new payment)

- If you want to make a payment or setup a payment schedule continue with the this section, otherwise logoff by clicking on your name at the top of the screen.
- From the “Giving” screen click on “+ Give” on the upper left corner.

The screenshot shows the 'Giving' interface. At the top, there are tabs for '+ Give', 'Giving', and 'Scheduled'. Below the tabs, there are filters for 'Reset Filters', 'Jul 1 - Nov 29, 2023', and 'Nondeductible'. The main content area displays a summary of gifts:

TOTAL AMOUNT	TOTAL GIFTS	NONDEDUCTIBLE
\$110.00	2	\$50.00

Below the summary is a table of transactions:

Gift Date	Gift Type/Ref#	Fund	Amount
10/13/2023	Mobile : Our checking	Rummage Sale	\$60.00
07/16/2023	Check	Rummage Sale Nondeductible Laptop	\$50.00

On the right side, there is a sidebar with the following sections:

- GIVING NUMBER**: None, Shared with Charlie Horton, [Manage Payment Methods](#)
- CURRENT PLEDGES**: Pledge Fund, Jan 1, 2023 - Dec 31, 2023, 100% (green bar), Total Pledge: \$2,900.00, Applied: \$2,900.00

- Setup a “**one time**” payment.
 - Click on “Give Once” for a one-time payment.
 - Enter the amount to give in the “Amount” field.
 - Select a Fund name.
 - “Pledge Fund” to make a payment toward your current pledge
 - “Non-pledged Support” to make a payment when you have no pledge.
 - “Youth” to make a payment to the Youth program
 - or other funds
 - Enter the “Gift Date” if other than today.

- Click “Continue” to proceed and indicate what payment method to use.

How would you like to give, Mary?

Payment method
Family checking account ▼

SUMMARY	\$100.00 total
---------	--------------------------

Back Cancel Give \$100.00

- Select which previously setup “Payment Method” to use.
- Click on “Give \$xxx.xx” to schedule the payment. The following screen should appear.

Thank you for scheduling your gift of \$100.00

Thank you for your gift to St. Patrick's Episcopal Church. Your support is greatly appreciated.

You will receive an email confirmation once this gift has processed.

Finish

- Click on “Finish” to return to your “Giving” screen.
-
- Setup a “**recurring**” payment.
 - Click on “Give Multiple Times” for a recurring payment.
 - Enter the amount to give each time in the “Amount” field.
 - Select a Fund name.
 - “Pledge Fund” to make a payment toward your current pledge

- “Non-pledged Support” to make a payment when you have no pledge.
- Click on the frequency of the gifts, “Every Week”, “Every Month”, etc.
- Select a “Start Date” to begin making payments.
- Click on “+ End” if you would like to specify an end-date for the automatic payments. If no end-date is specified the gift will go on forever. If “+ End” is clicked a box will appear to specify that date.
- To verify, a message will appear at the bottom indicating if the recurring payment specified will complete your pledge.
- When satisfied, click “Continue” to proceed and indicate what payment method to use.

How would you like to give, Mary?

Payment method
Family checking account ▼

SUMMARY	\$100.00 <small>total</small>
---------	---

Back Cancel Give \$100.00

- Select which previously setup “Payment Method” to use..
- Click on “Give \$xxx.xx” to schedule the payment. The following screen should appear.

Thank you for scheduling your gift of \$100.00

Thank you for your gift to St. Patrick's Episcopal Church. Your support is greatly appreciated.

You will receive an email confirmation once this gift has processed.

Finish

- Click on “Finish” to return to your “Giving” screen.