


# Updating Payment Methods in Realm

## Updating an Existing Payment Method in Realm

These are the steps needed to update a payment method in Realm. For example, if you have been giving \$100 a month from your checking account and you want to have the money taken from your savings account instead then these are the instructions.

### 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 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

Password

[Sign In](#)

[Forgot your password?](#)

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## Step 2 (Setup new/additional 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.
- 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 new payment method.

### Payment Methods



+ Add Payment Method

Type	Details	Billing Address	Next Scheduled Payment	
 Checking	Family checking account Checking ****1697	Santa Claus 1 Cold Street Ice City, AK 01234	\$120.00 on December 15, 2023 Once a month	...

- 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 both of your payment methods. 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 are still scheduled to come out of the old account.

## Step 3 (Change what account is used for gifts)

- You should now see a history of the gifts you have given to St. Patrick’s recently.
- Click on “Scheduled” at the top of the screen. This will produce a list of all the scheduled gifts you have defined. In this example a \$100 gift has

been scheduled each month on the 13<sup>th</sup> from the checking account for a total of \$1200 a year.

+ Give Giving Scheduled

Reset Filters Active, On Hold

⚠ Your recurring gift of \$100.00 to Pledge Fund has been put on hold.  
[Update Recurring Gift](#)

**\$100.00 gift scheduled for Dec 13, 2023**

Pledge Fund  
Monthly on the 13th  
Family checking account

- To update which payment method is used for a particular gift click on the three dots on the right side of the window. Select “Edit”.
- You will be taken to the window describing the gift. Click on “Continue”.

How much would you like to give?

Amount **\$100.00** Fund Pledge Fund

+ Another Fund

GIVE ONCE GIVE MULTIPLE TIMES

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

Start date Today + END

**This will not complete your pledge to Pledge Fund within 01/01/2024 - 12/31/2024**

SUMMARY	<b>\$100.00</b> every month
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Cancel Continue

- On the “How would you like to give” screen you will see what payment method is currently being used for your gift. Update the payment method. When finished click on “Save”.

- On the next “Thank You” screen click on “Finish”.
- You are finished updating the payment method but your payment schedule has been put on hold. I know this is redundant, but...
- From the “Giving” screen, click on the three dots on the right of the window. Select “Reactivate”.
- You will see the description of your gift schedule. Click on “Continue”.
- On the “How would you like to give” screen you will see your payment methods. Verify the payment method is correct for your gift. Update the payment method. When finished click on “Save”.
- On the next “Thank You” screen click on “Finish”.
- You are done.