Making Your Annual Pledge in Realm

- On behalf of the parish and Stewardship committee, thank you for considering a pledge!
- We hope this guide helps making your pledge and managing your gifts easy and convenient

THE PARISH OF THE EPIPHANY

What is Realm?

Realm is a **web application**, accessible through your favorite web browser, helping churches manage their communities and finances.

Realm is **NOT the parish website** at 3crowns.org-- it is a fully separate product with its own data and a separate directory of parishioners.

Realm has a **different login** than the 3crowns website. The login may look the same—it's your email address— and you may make the password the same. But they are two different places, and can have different passwords.

Overview

- You'll need to get logged onto Realm
- You'll need to fill out and submit the on-line pledge form
- You'll want to review your pledge and giving
- You may wish to schedule your pledge payments

Getting Logged into Realm

Preliminaries

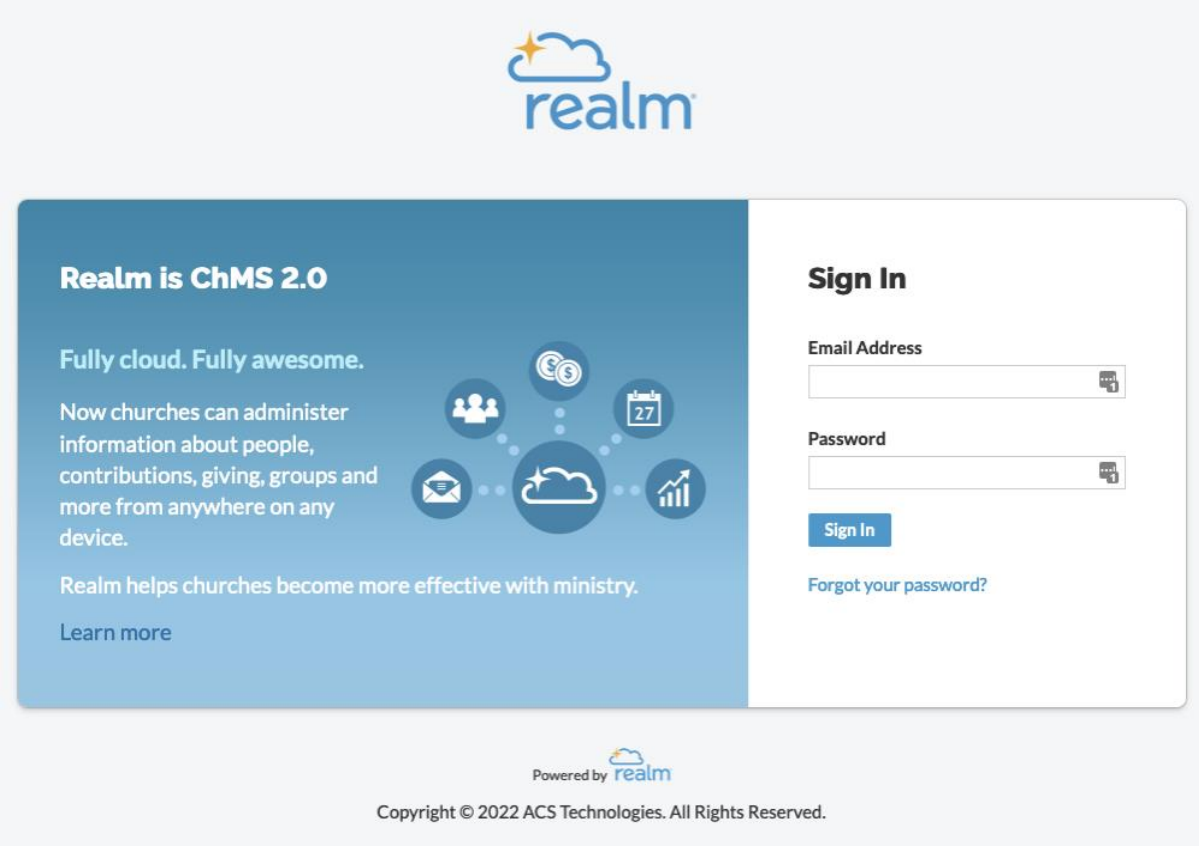
If you aren't sure if you have set up your Realm login, please see our other guide: "Getting Started in Realm", a separate file available on the 3 Crowns website

If you complete that guide, you should be logged in and ready to skip to working with the Pledge form

realm

Signing In

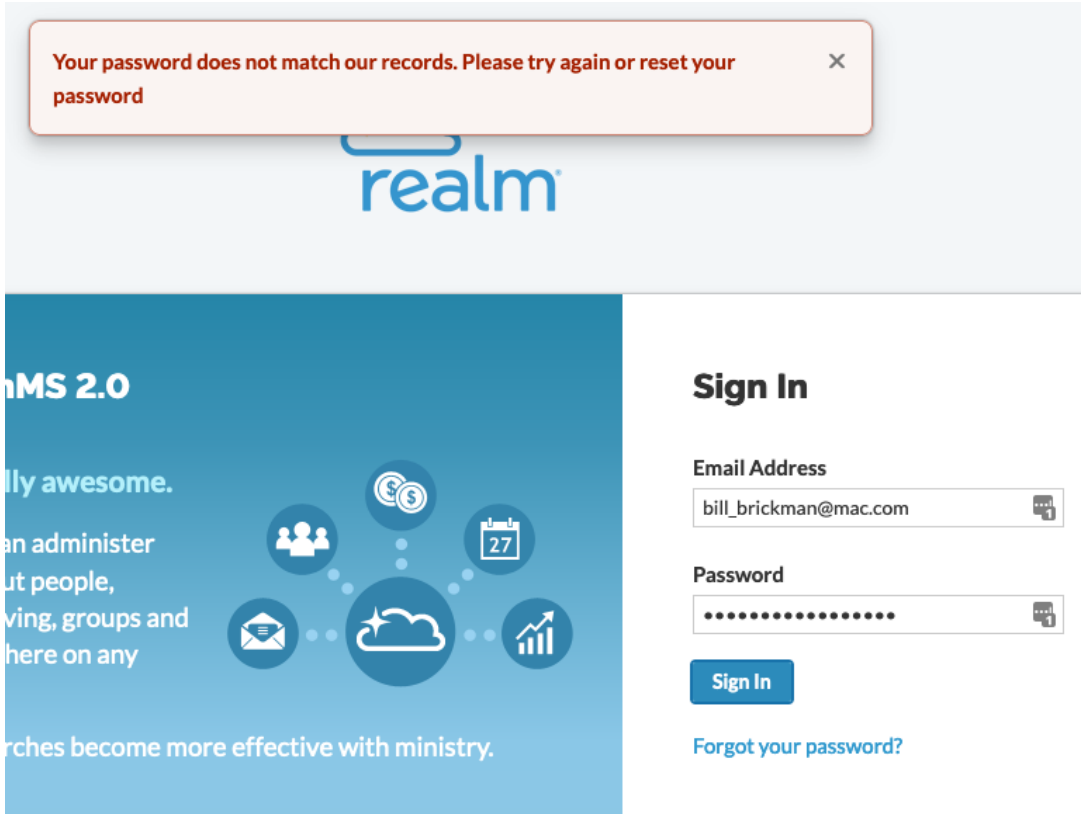
Open	Your favorite web browser
Browse	To "onrealm.org"
Enter	Your email and password
Click on	The blue "Sign In" button



Note: Realm does not sign you out automatically between sessions, so you may get right in!

Password Problems

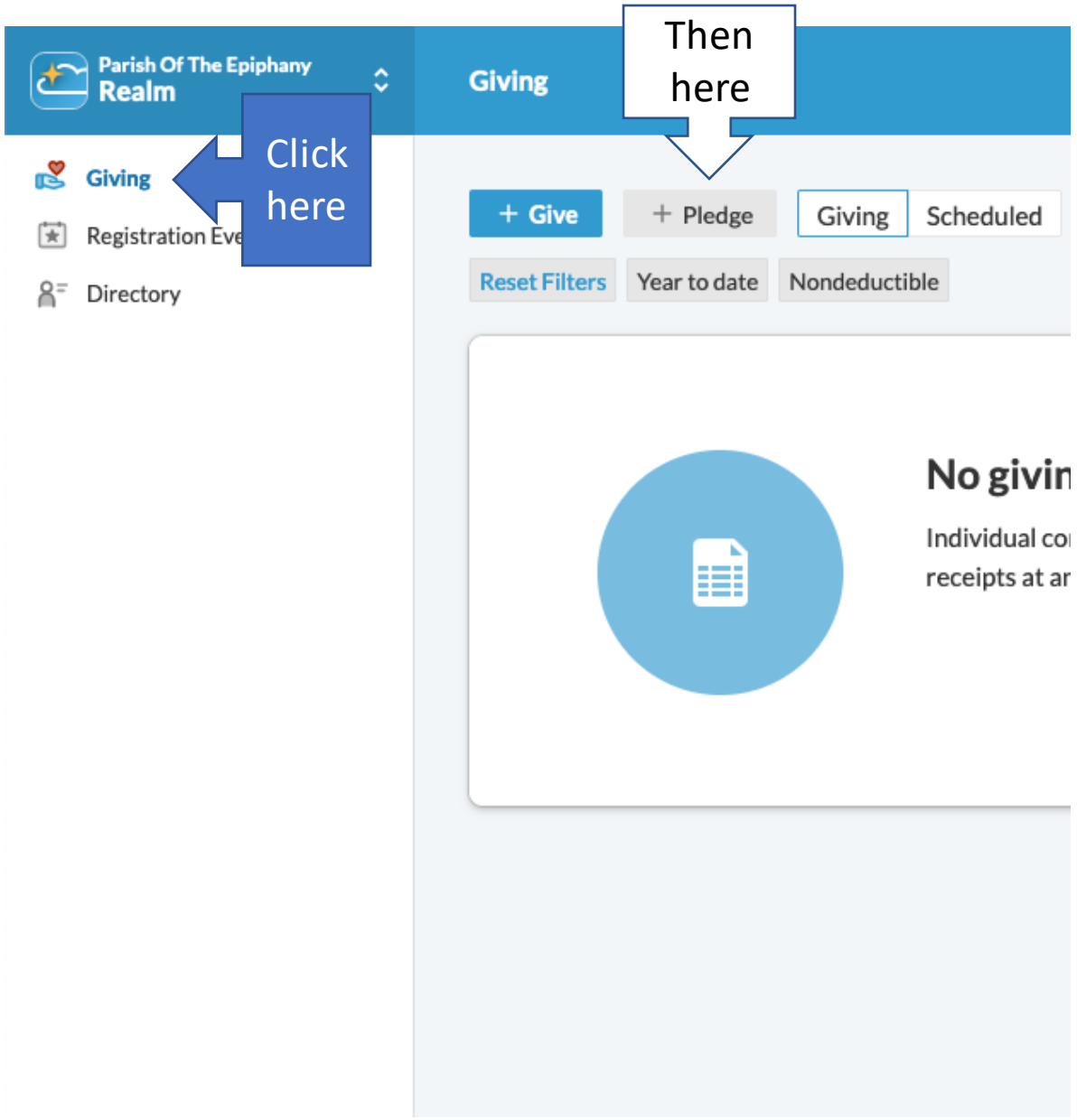
- If you see the message "Your password does not match our records", the good news is you have a Realm login at that email address.
- You can attempt to guess passwords as many as ten times without danger of locking your Realm account and needing administrator intervention.
- You can also reset your password easily. Click the blue "Forgot your password?" link at the bottom of the form, and you'll receive a reset email at the address you provided.
- If you'd like more help, please see our other guide: "Resetting Your Realm Password", also available as a separate file on the 3 Crowns website



Making Your Annual Pledge

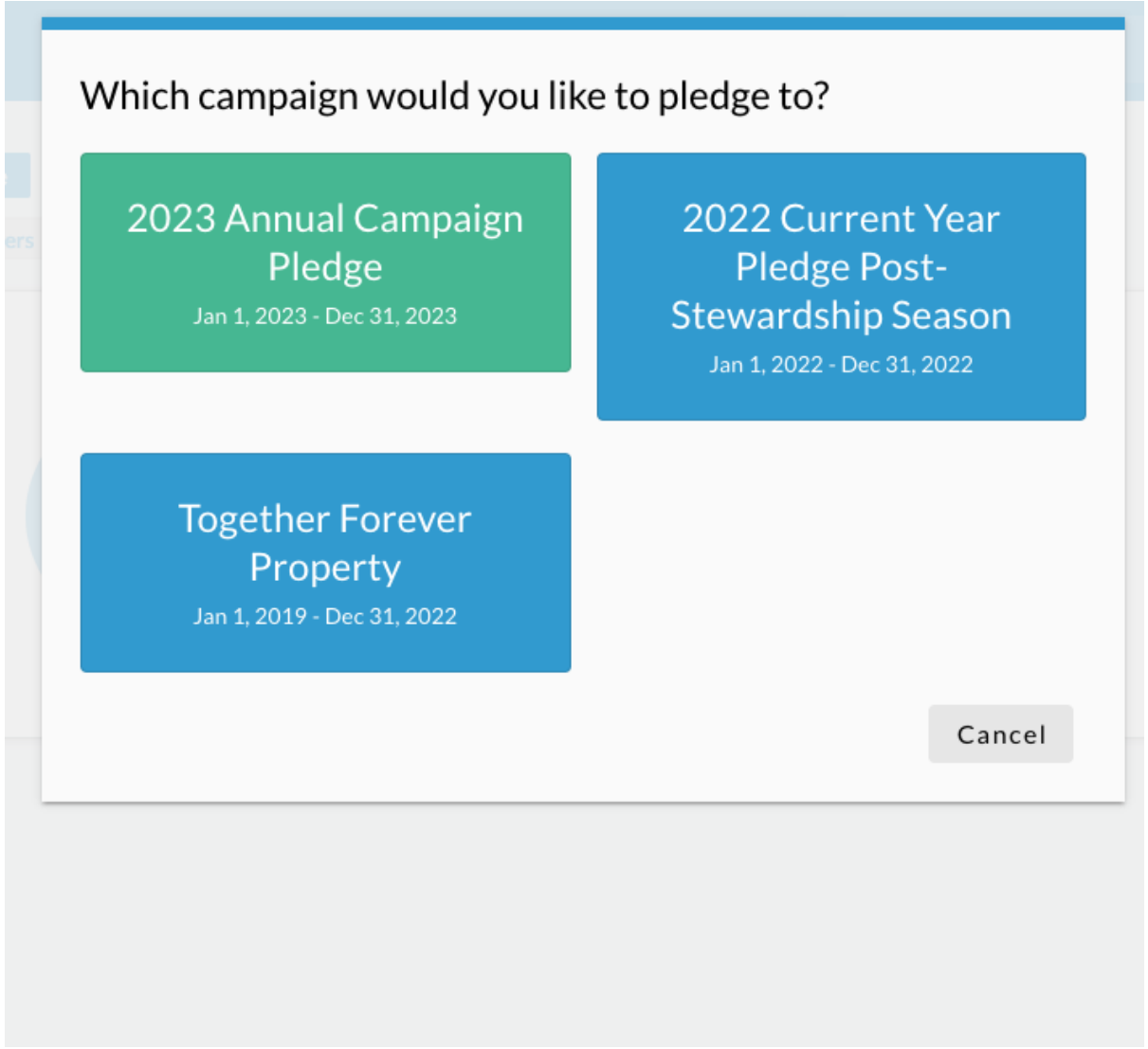
Making a Pledge: Step 1

Click	"Giving" in the left-hand side menu
Review	Your giving history, if any
Click	The grey "+ Pledge" button in the top middle above any giving history



Making a Pledge: Step 2

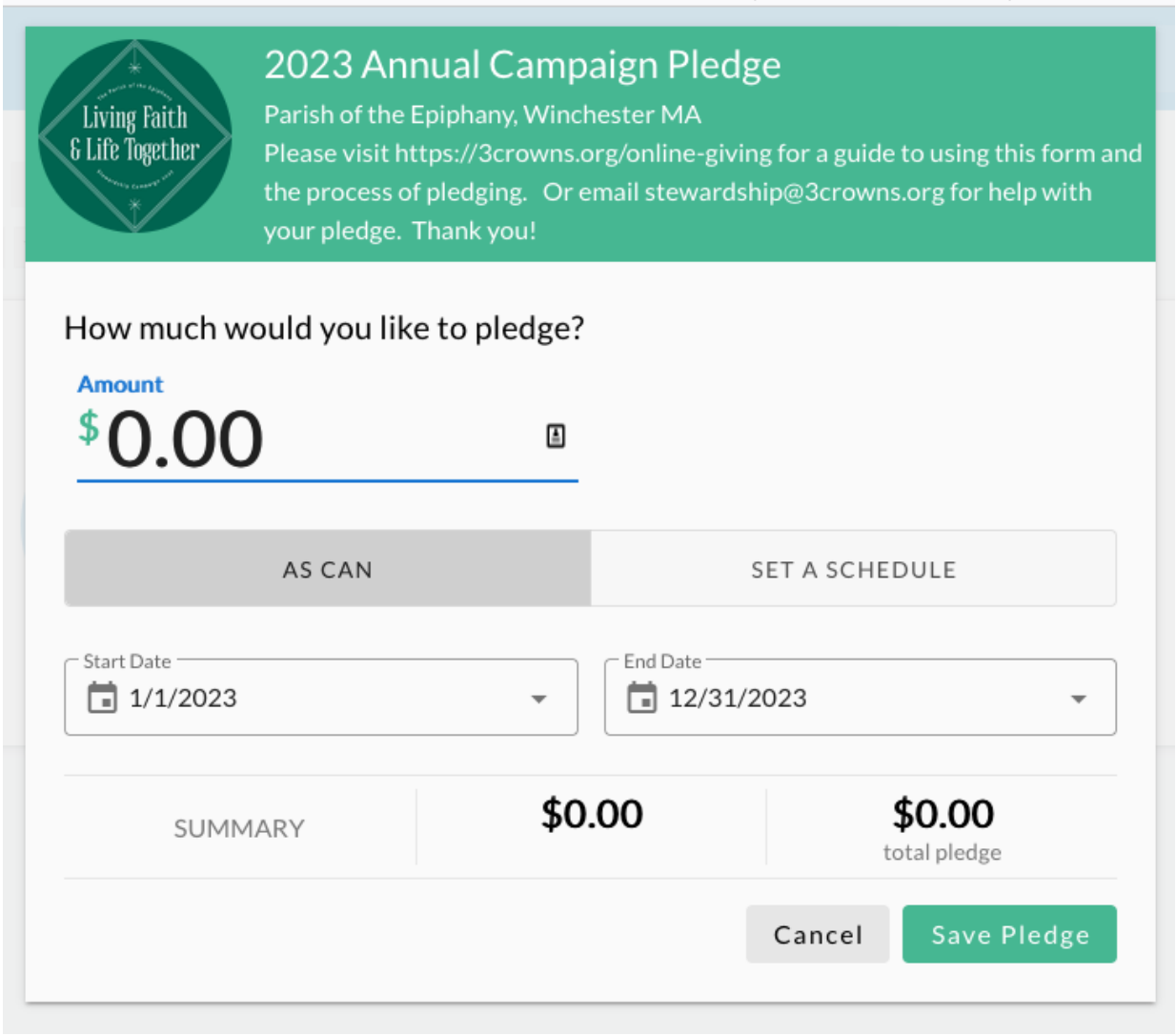
Review	The list of pledge options, if any
Confirm	Your choice has the correct dates and has "Annual Campaign Pledge" in its name
Click	Anywhere in the box with the correct choice



Note: campaigns you have already pledged to, like the current year, will not appear as choices.

Making a Pledge: Step 3

Confirm	You are on the pledge form for the campaign desired
Enter	in "Amount" a value for your planned pledge payments
Toggle	To your choice of pledge payment schedule type: "As Can" or "Set a Schedule"



Caution: the Amount field is your planned regular payment amount, not necessarily your total pledge for the year

Choosing a Pledge Payment Schedule Type

"As Can" (the default)

Choose if you:

- Don't want to make a plan
- Aren't sure if your plans might change next year
- Want to make payments on a schedule not offered

Amount to enter: your total pledge amount for the year

"Set A Schedule"

Choose if you:

- Want to pledge a regular payment schedule
- Would like help figuring each payment vs. a total

Amount to enter: each period's payment amount

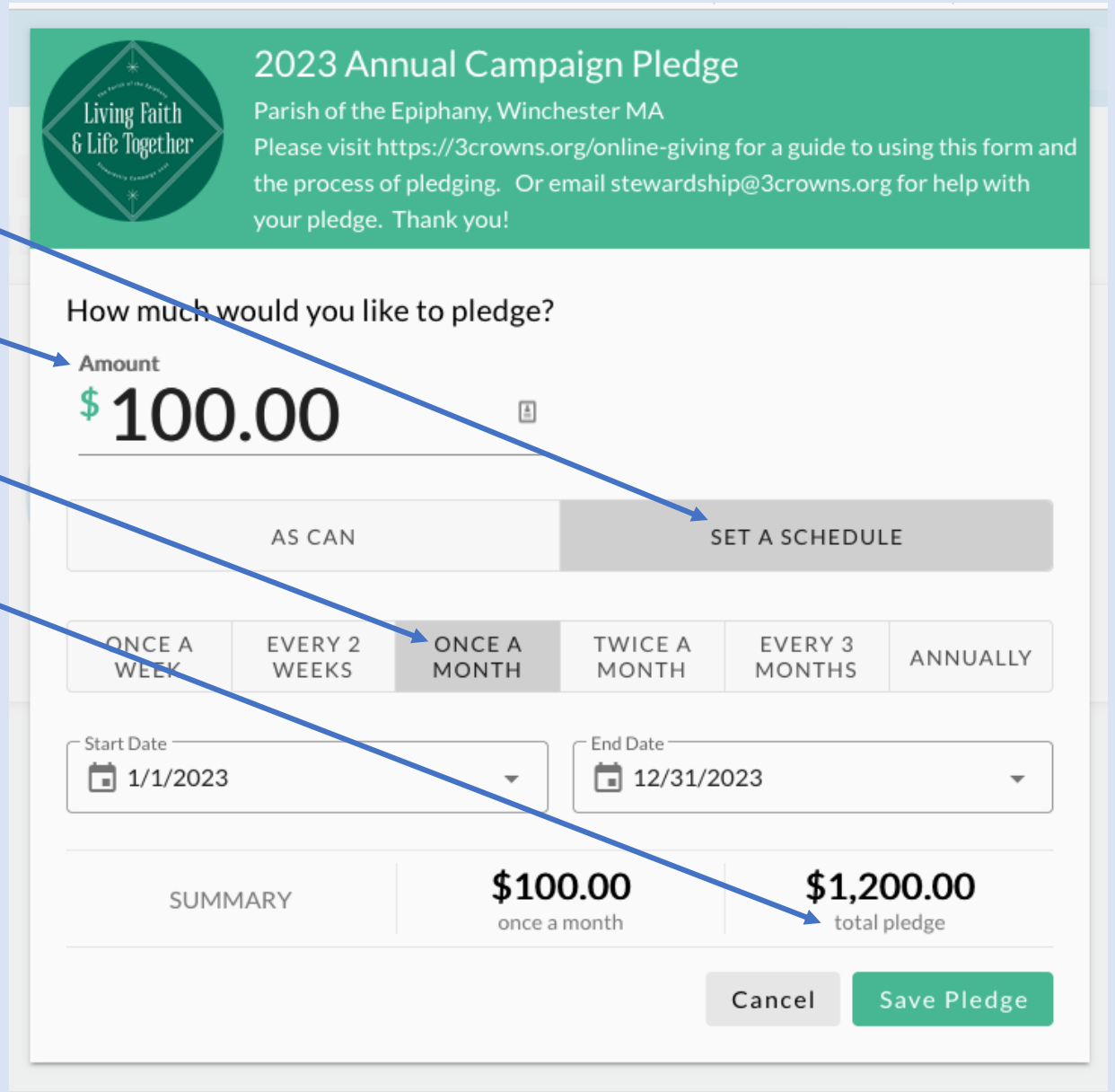
When the form is toggled to "Set A Schedule"

the **Amount** you can enter

will be multiplied by the **interval** you pick

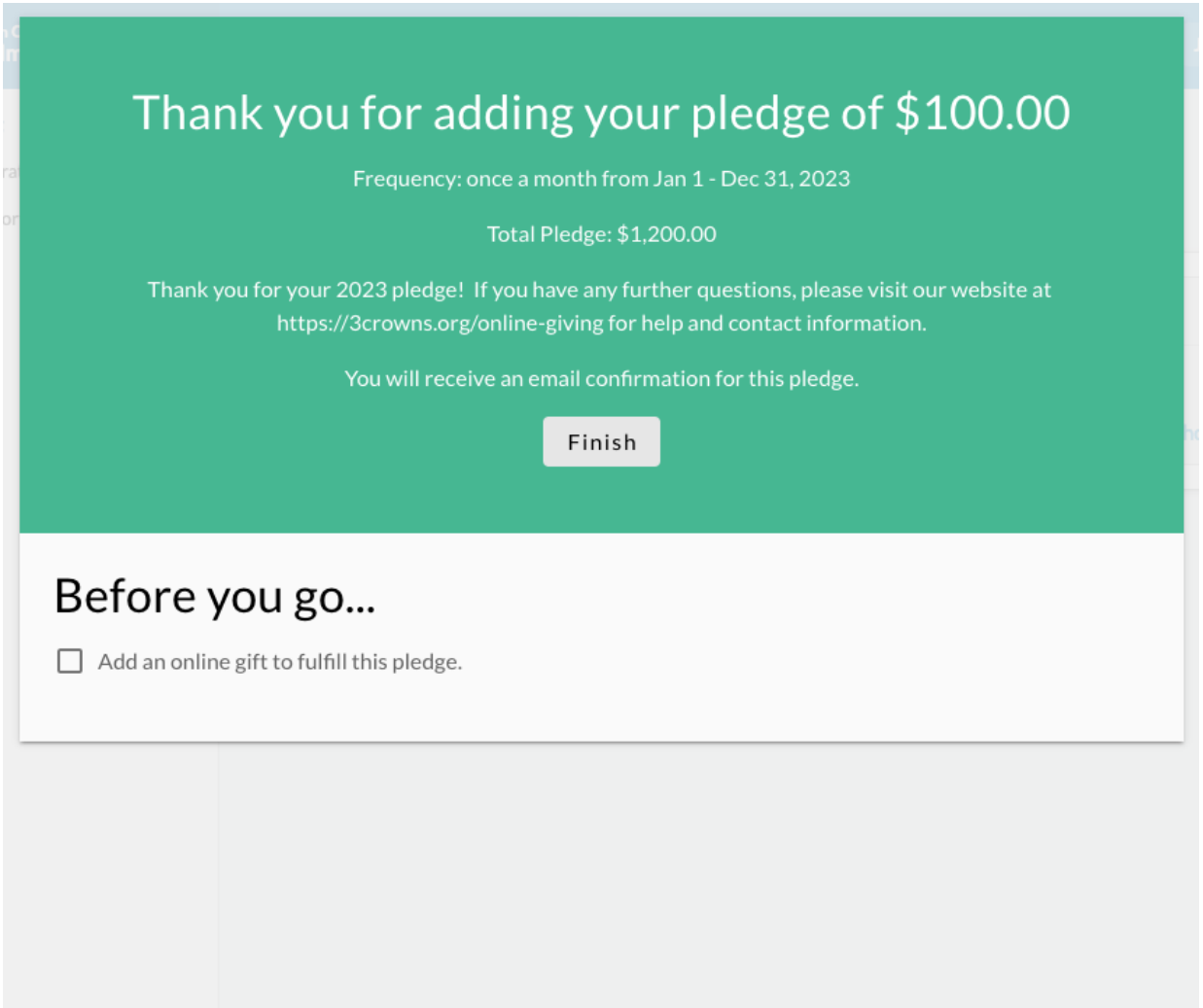
to calculate your ***total pledge***

Caution: Review your ***Total Pledge*** carefully before saving and submitting it



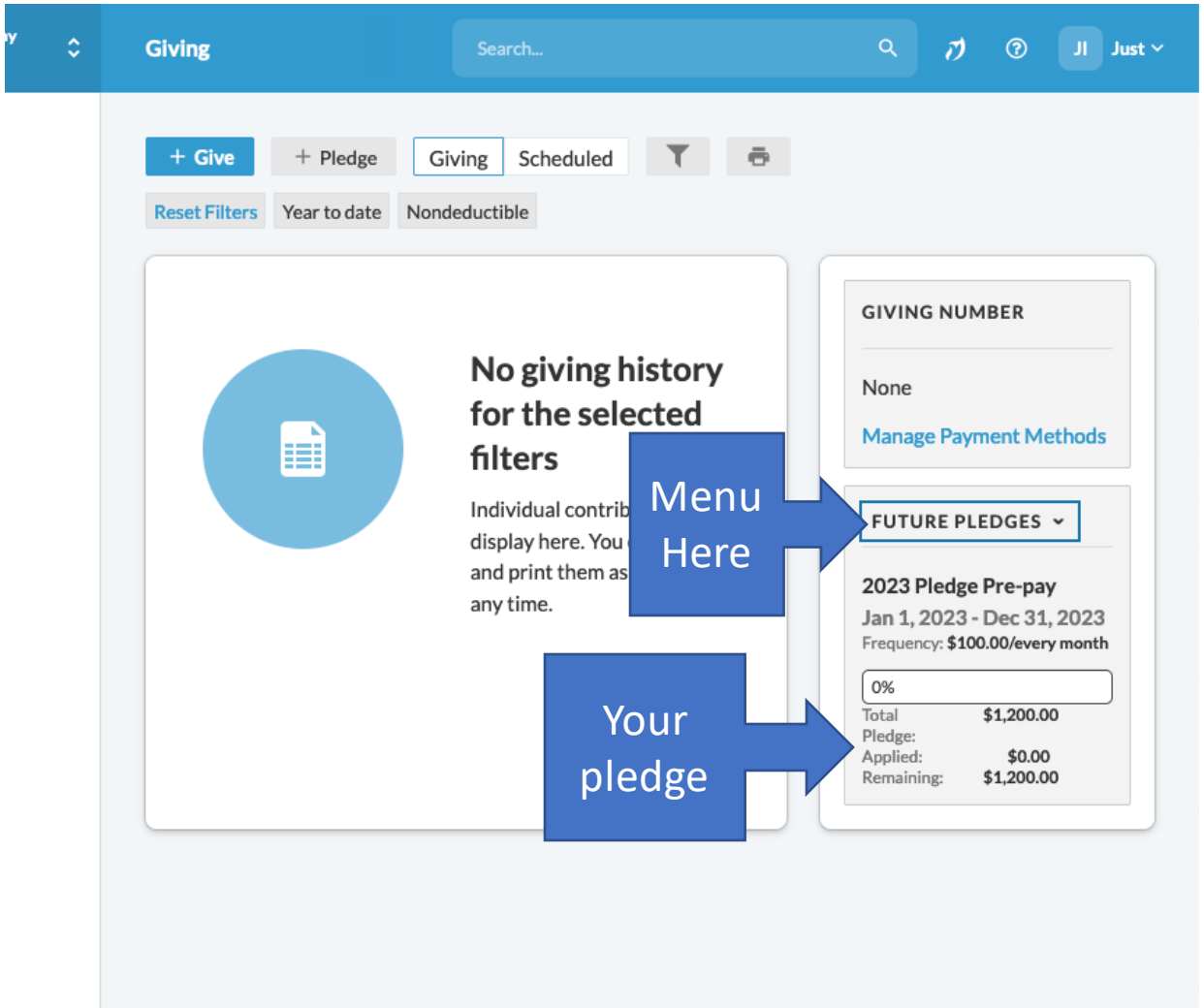
Making a Pledge: Step 4

Check	Your total pledge amount is correct
Click	The Green "Save Pledge" button
Confirm	The amounts in the confirmation window
Click	The grey "Finish" button



Viewing Your Pledge

Click	"Giving" in the left-hand side menu again
Click	The dropdown arrow next to "CURRENT PLEDGES" in the lower grey box to the right of your giving history
Choose	The value "Future Pledges" in the dropdown
Review	Your pledge for next year is correct



Scheduling Your Pledge Payments

So Far You Have Only Submitted a Pledge, a Promise to Give

Having put your pledge in digitally through Realm, you can still:

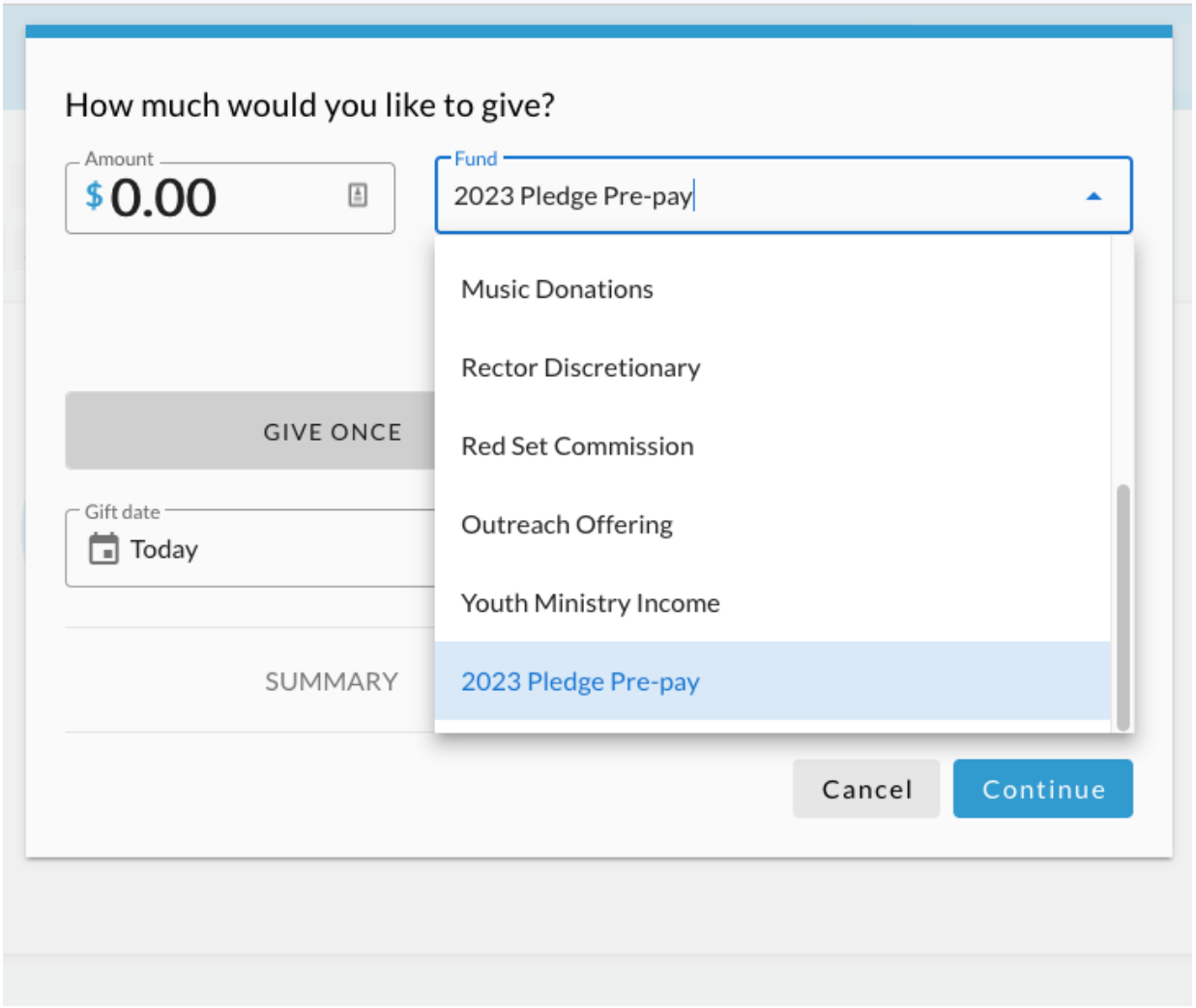
- Make pledge payments with cash or check, through your bank on-line, outside of the Realm system
- Make your pledge payments on any schedule you wish, whatever your pledge schedule said
- Contact Stewardship at any point through the end of your pledge period to make a change to your pledge

But you may wish Realm to digitally manage payments through direct charges:

- Schedule pledge payments through Realm charging your bank account or credit card automatically
- Make lump sum pledge payments through Realm at times you wish during the pledge year
- Make a pledge payment through Realm now, before the pledge campaign period starts in January

Scheduling Payments: Step 1

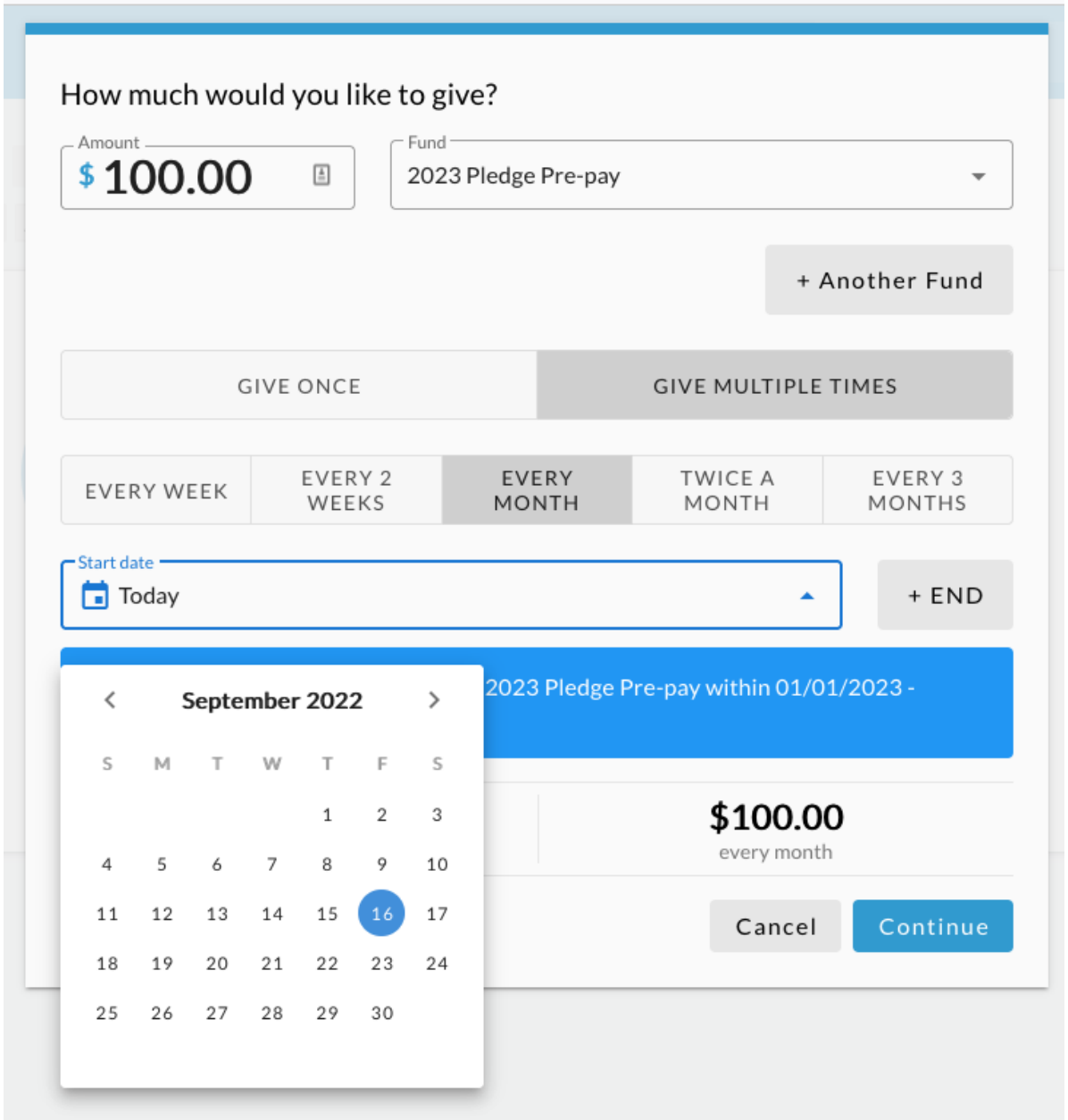
Click	"Giving" in the left-hand side menu
Click	The Blue "+ Gift" button to pop up form
Click	The dropdown menu under "Fund"
Scroll	To the bottom & choose "Pledge Pre-pay"



Caution: if you leave the default Fund choice, you will be making a pledge payment for the Current Year, not Next

Scheduling Payments: Step 2

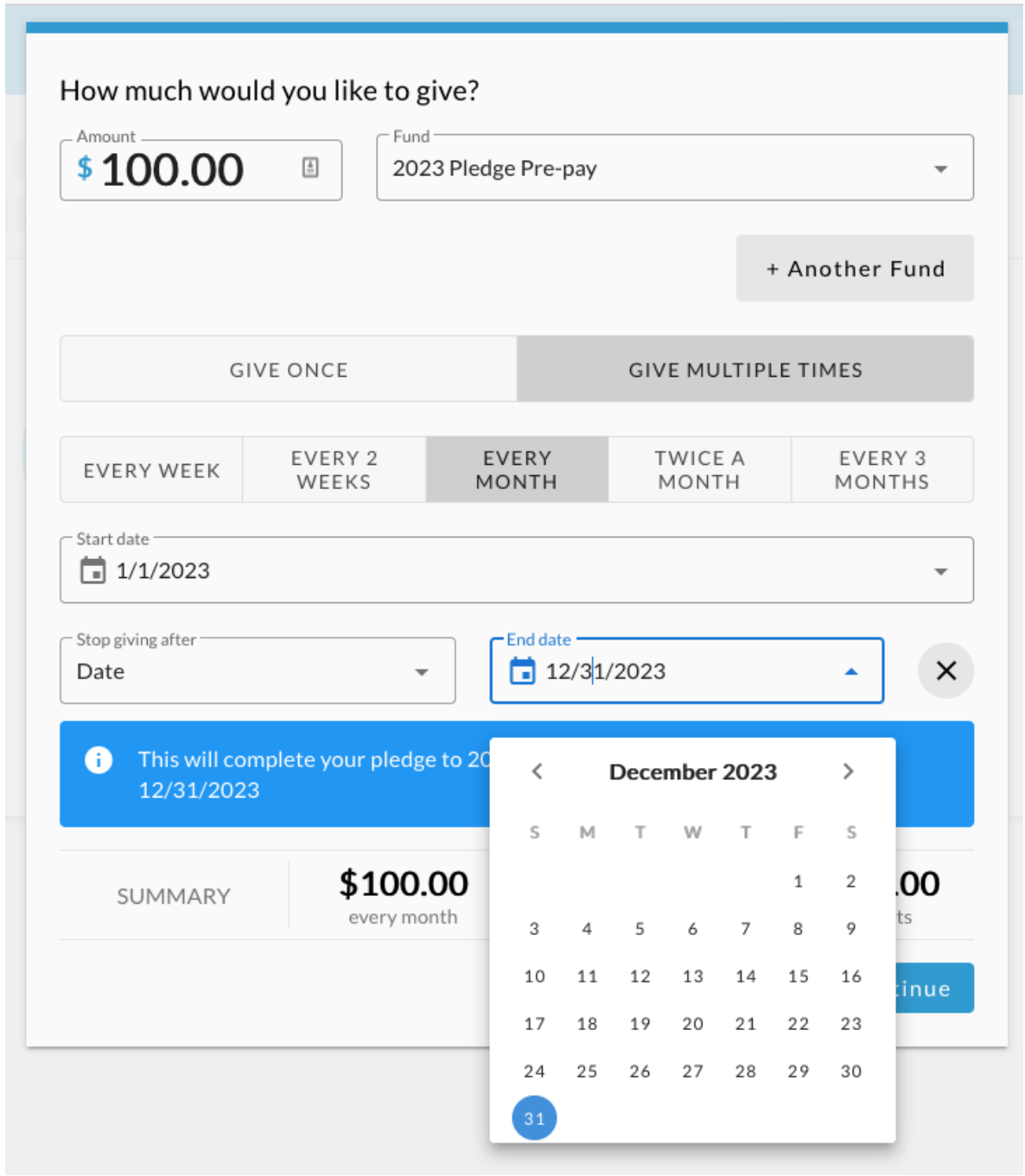
Enter	The "Amount" of each payment to be made
Toggle	To "Give Multiple Times" to set interval
Click	On the word "Today" to show calendar menu
Choose	The date of the first payment (ex. Jan 1st)



Caution: if you leave the default Today choice, you will be asking for a pre-pay pledge payment made immediately

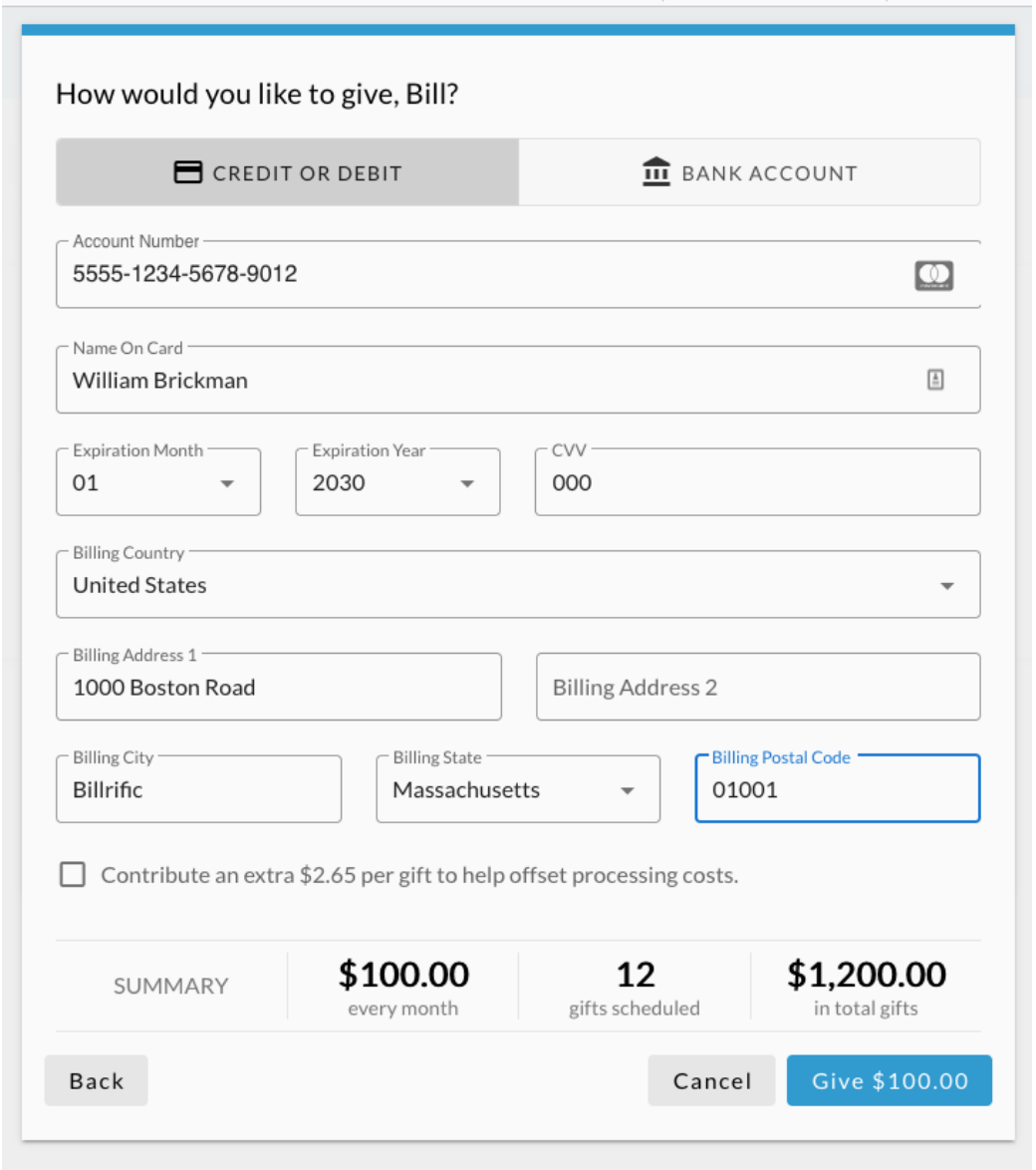
Scheduling Payments: Optional End Date Step

Choose	Stop Giving After: "Date" (or # of payments)
Click	The grey "+ END" button to the right of Start Date
Click	On the text in the End Date field to show calendar menu
Choose	An end date for the schedule (ex: Dec 31st)



Scheduling Payments: Step 4a (with Credit Card)

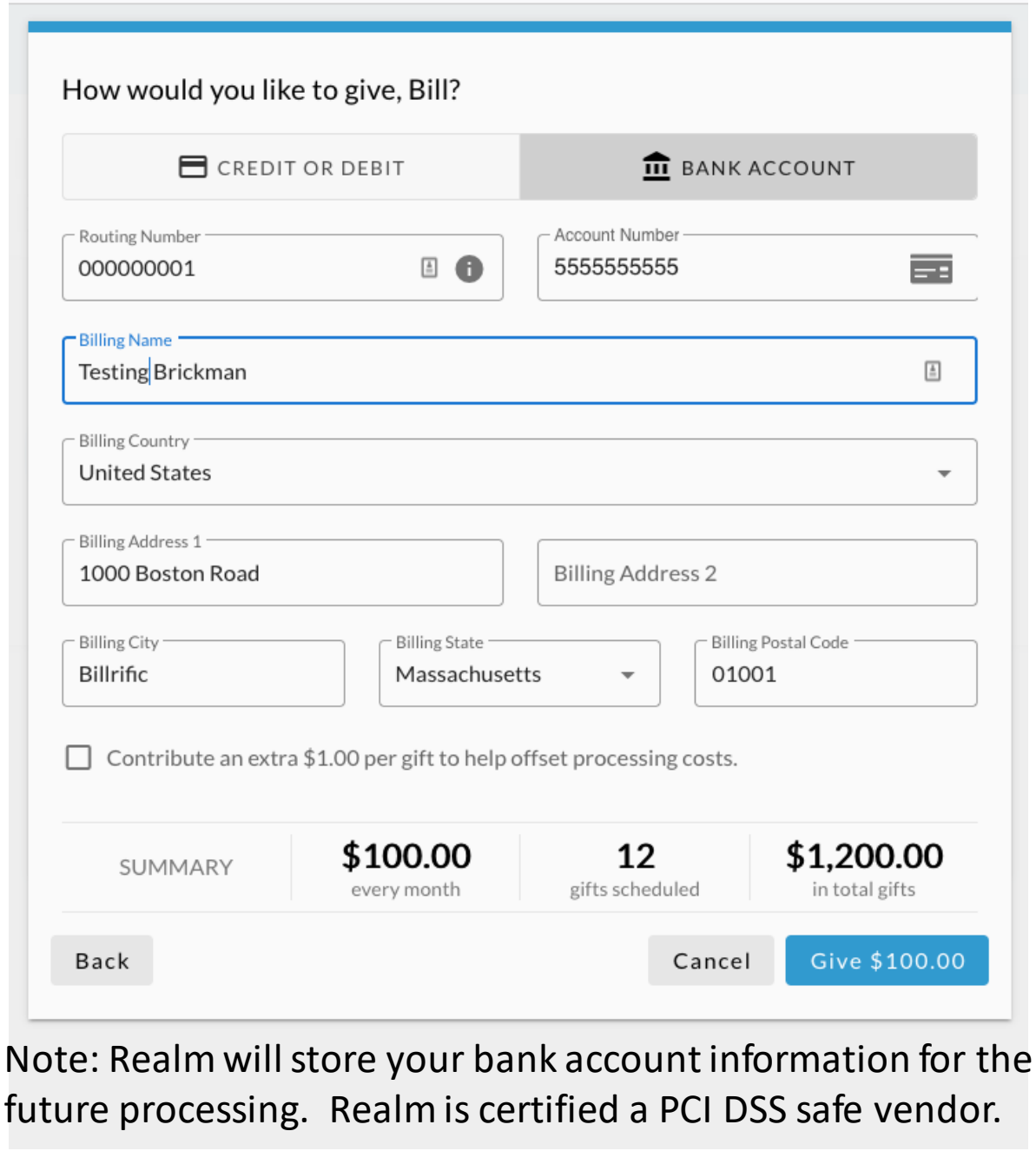
Choose	"Credit or Debit"
Enter	Your credit card information
Confirm	With your CVV value from the back of your card
Click	The blue "Give" button when satisfied



Note: Realm will store your credit card information for the future processing. Realm is certified a PCI DSS safe vendor.

Scheduling Payments: Step 4b (Bank Account)

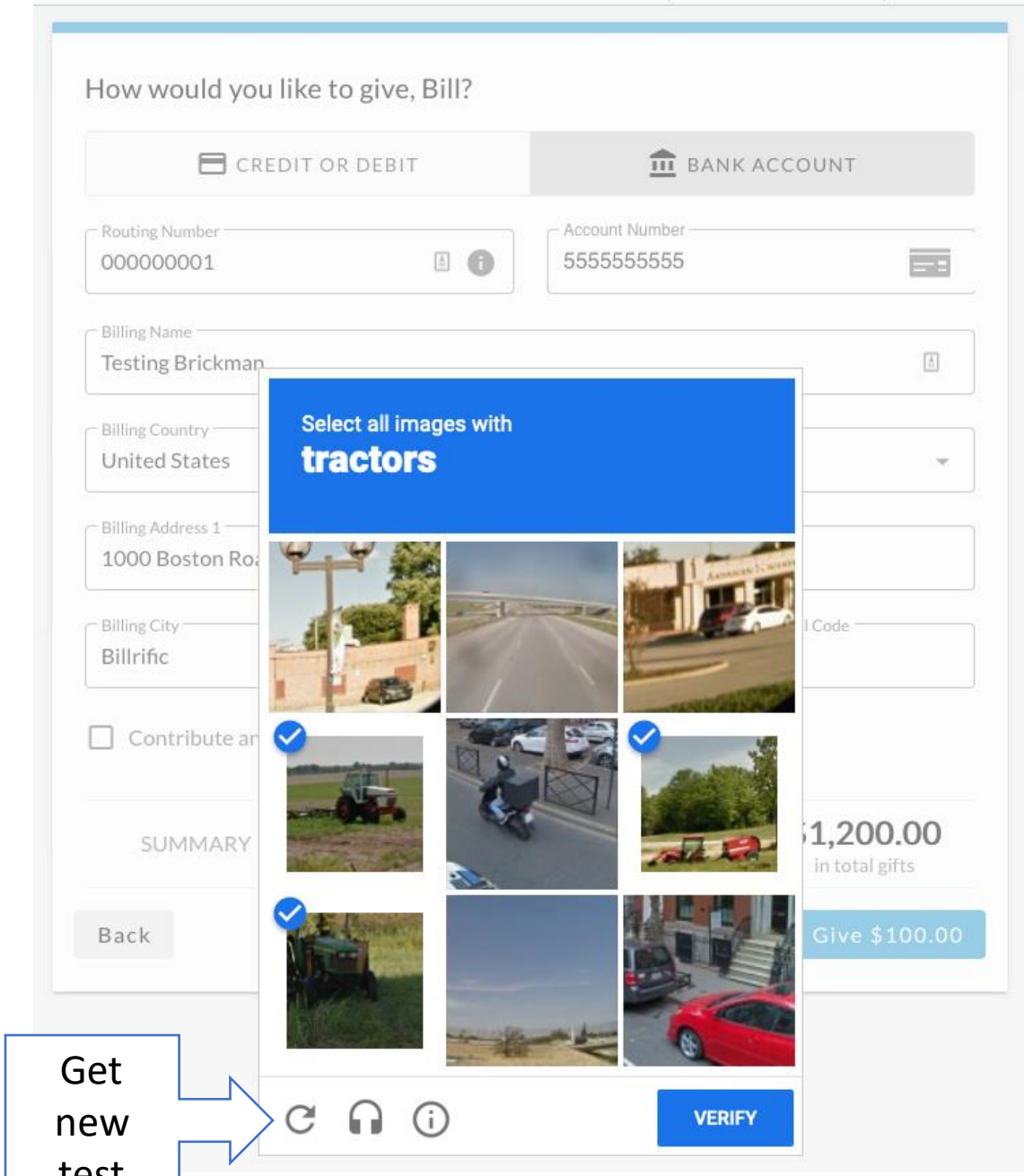
Toggle	To "Bank Account"
Enter	Your bank routing number and account (from a check)
Enter	The billing address matching your bank's info for you
Click	The blue "Give" button when satisfied



Note: Realm will store your bank account information for the future processing. Realm is certified a PCI DSS safe vendor.

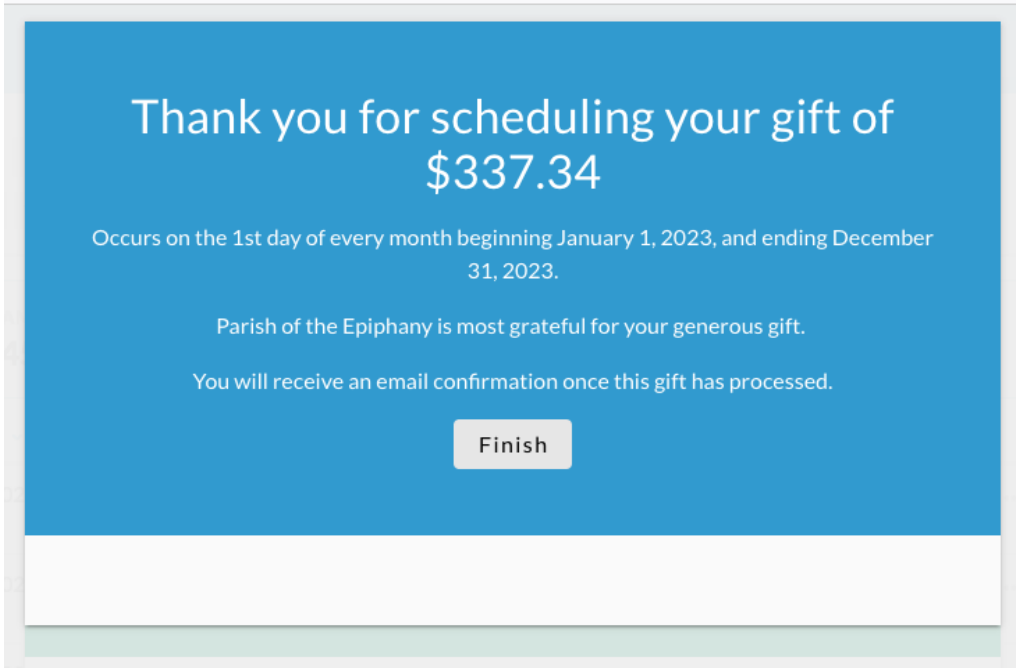
Scheduling Payments: Step 5

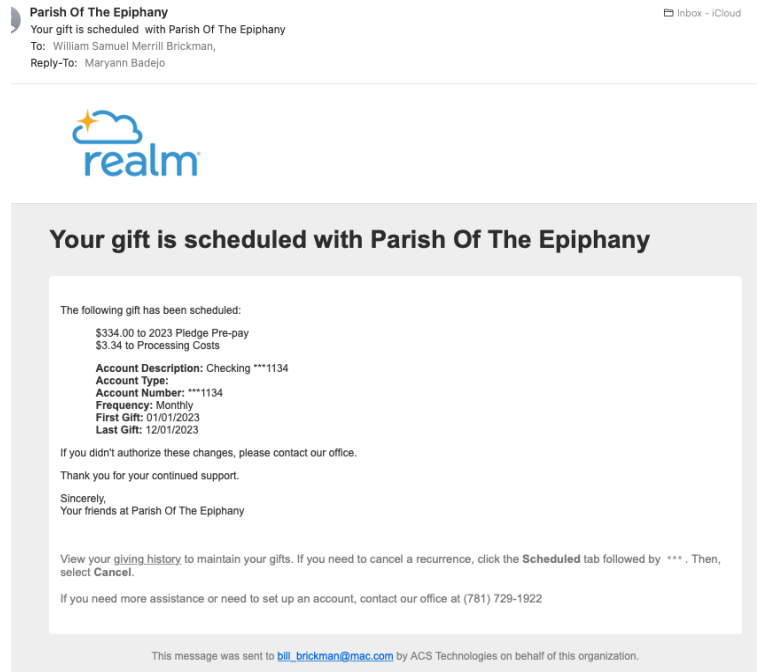
Review	The required reCAPTCHA test
Click	On the pop up as directed
Refresh	The test with the "circle arrow" if stuck
Click	The blue "Verify" button to finish



Scheduling Payments: Step 6

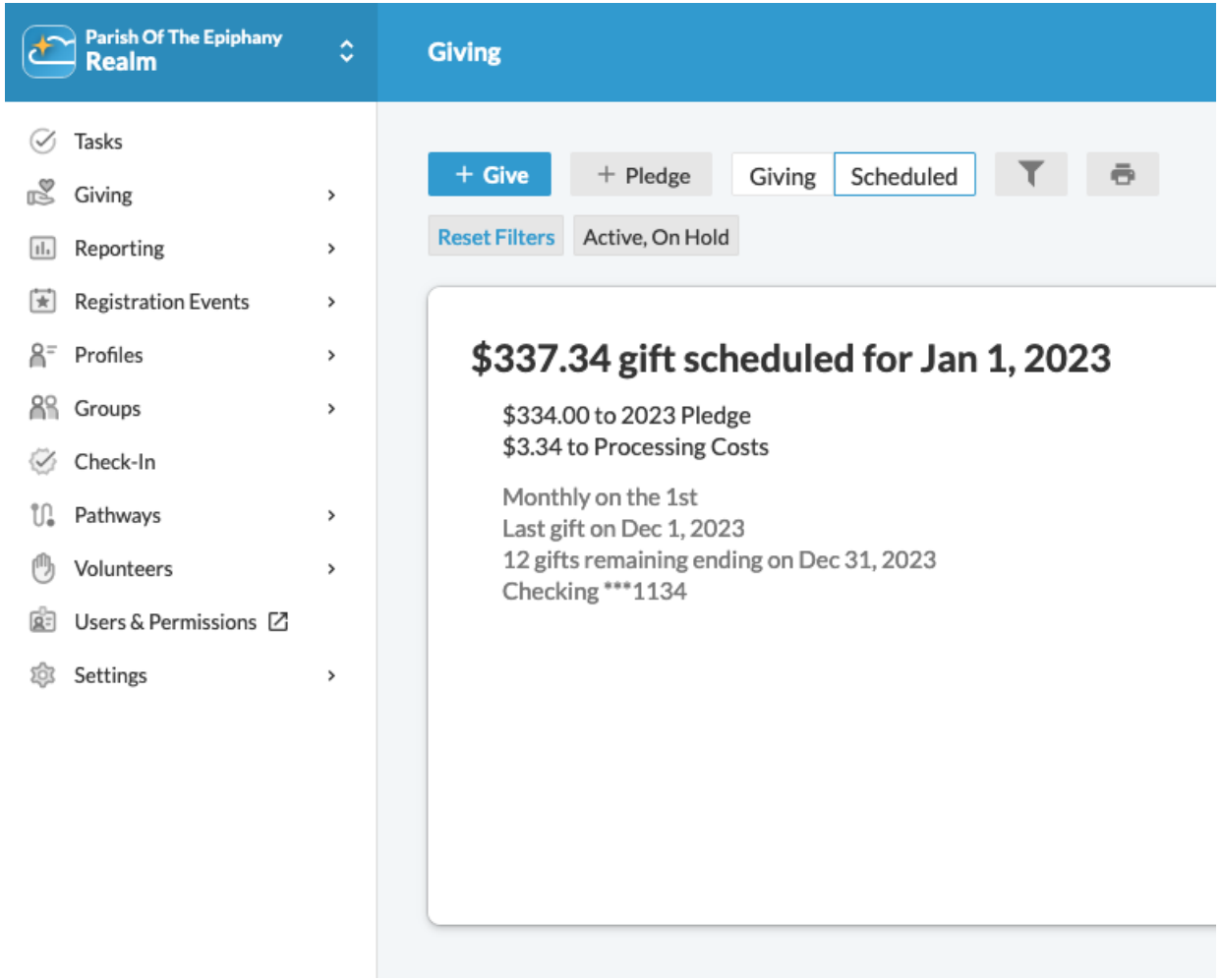
Confirm	The correct amounts, schedule dates
Click	The grey "Finish" button to return
Check	Your email for a confirmation of schedule
Check	Your email for a payment receipt if paying today





Scheduling Payments: Step 7

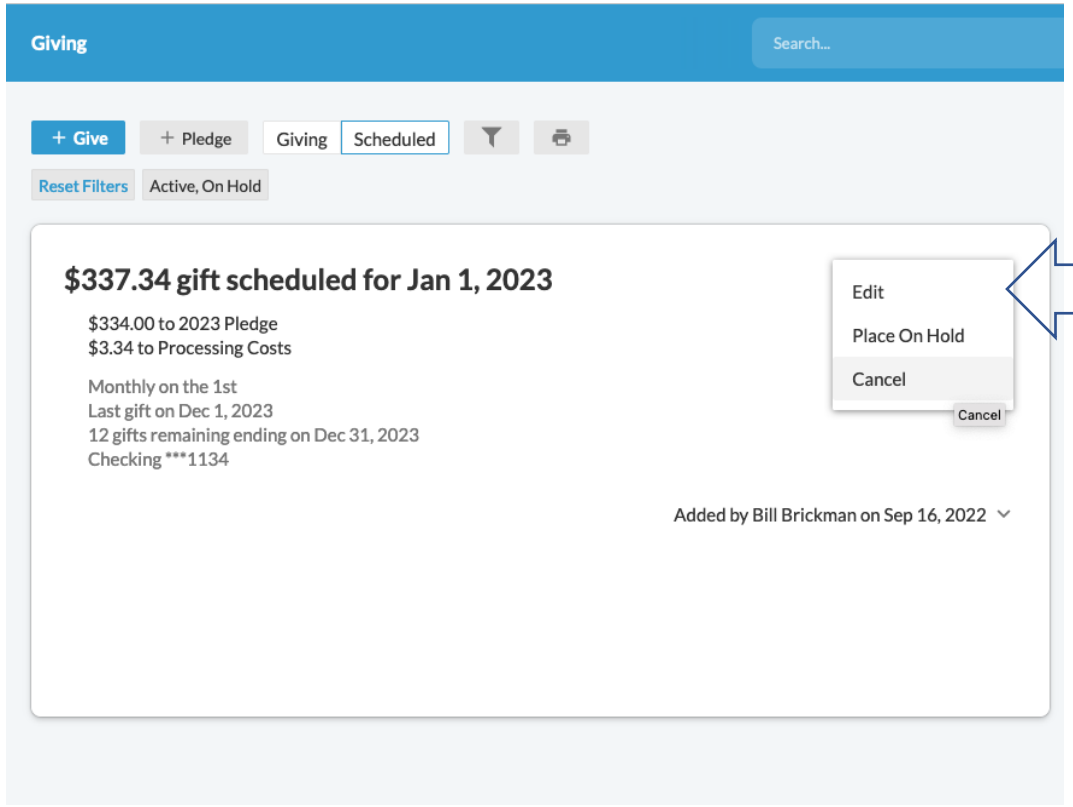
Click	"Giving" in the left-hand side menu
Toggle	From "Giving" to "Scheduled"
Review	Your gift schedule including payment source
Check	Your Giving History here later for payment log

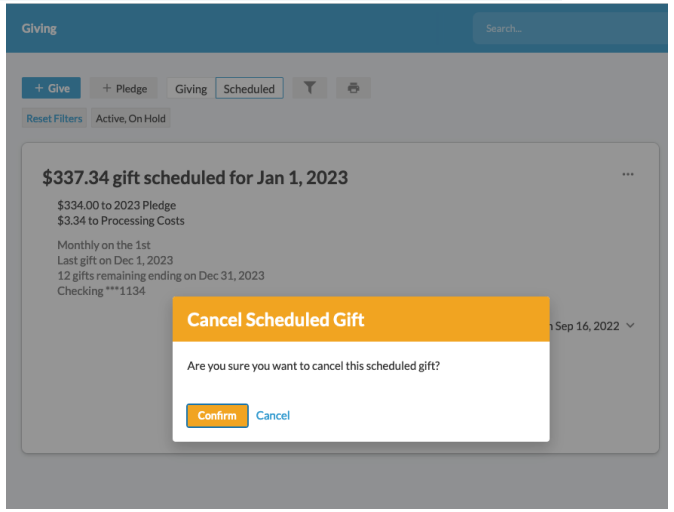


Cancelling a Payment Schedule

Cancelling a Schedule:

Click	"Giving" in the left-hand side menu
Toggle	From "Giving" to "Scheduled"
Click	On the "…" icon in the corner of the gift listed
Choose	"Cancel" in the dropdown menu and Confirm





For Further Help

- Check out the http://3crowns.org/online-giving web page for help and guides like this one
- Contact Stewardship by email at stewardship@3crowns.org, for help with Realm, your pledge, or scheduling payments during this Stewardship Season