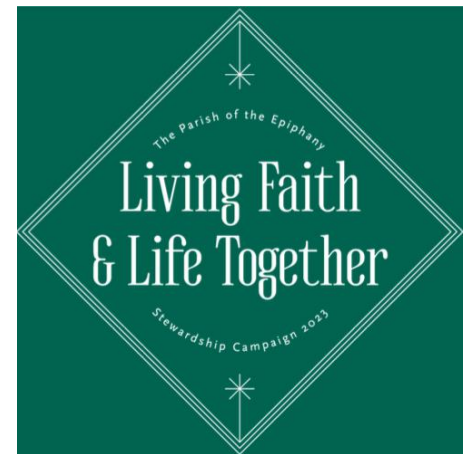


Making Your Annual Pledge in Realm

- 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

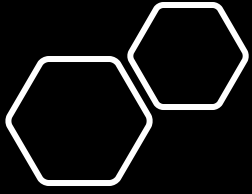
You'll need to fill out and submit the on-line pledge form

You'll want to review your pledge and giving

You may wish to schedule your pledge payments

A photograph of a red door with black iron knockers and a mail slot, set in a stone wall with a Gothic window. The text "Getting Logged into Realm" is overlaid in white, underlined.

Getting Logged into Realm



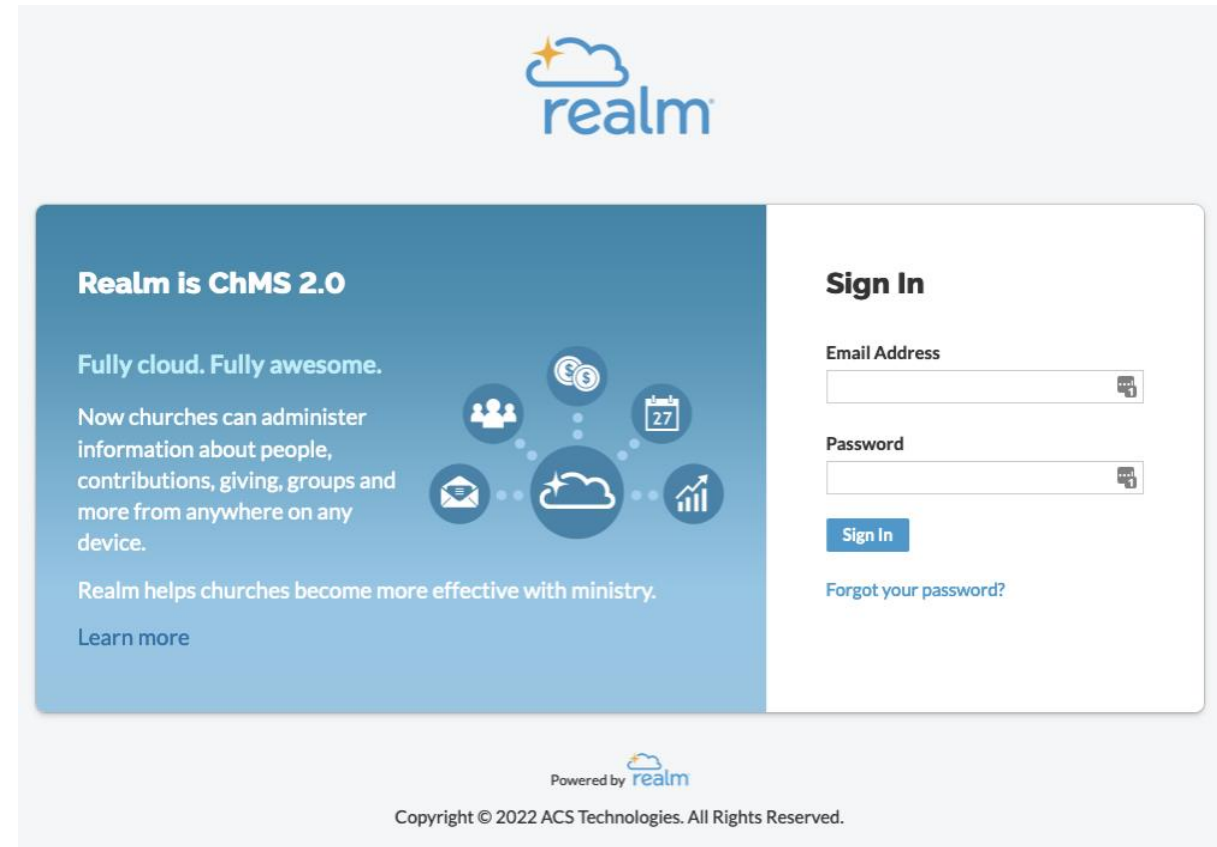
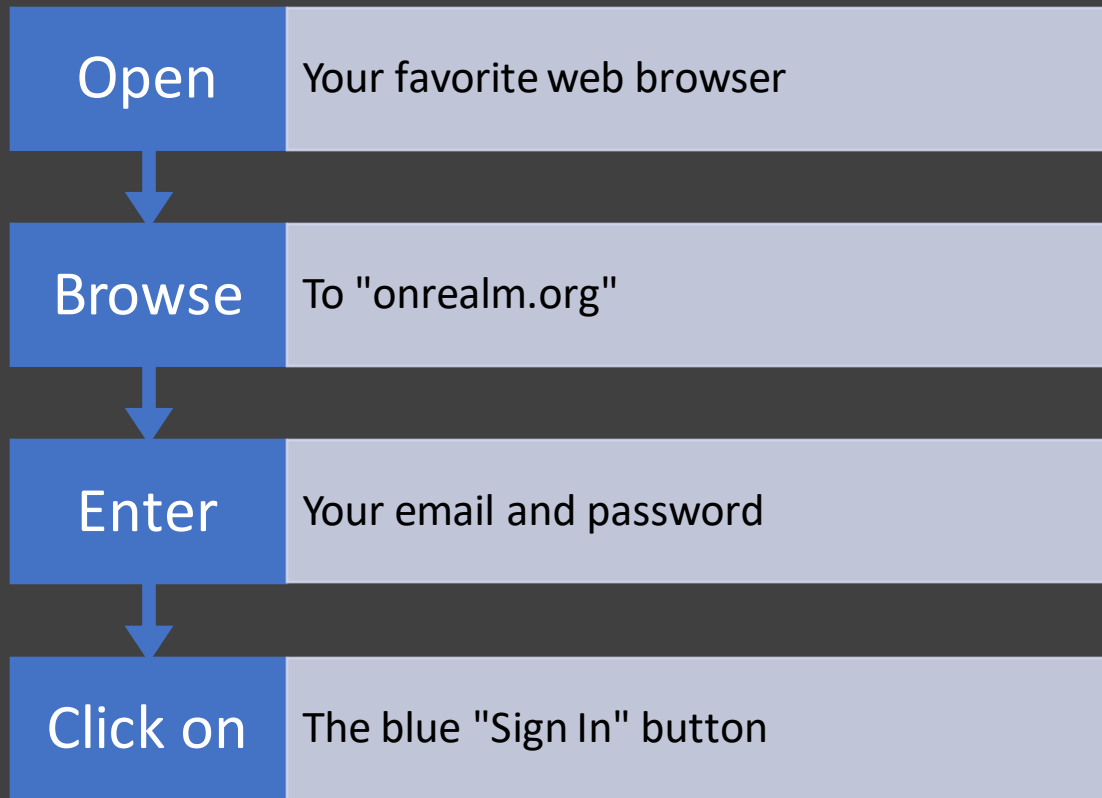
Preliminaries

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



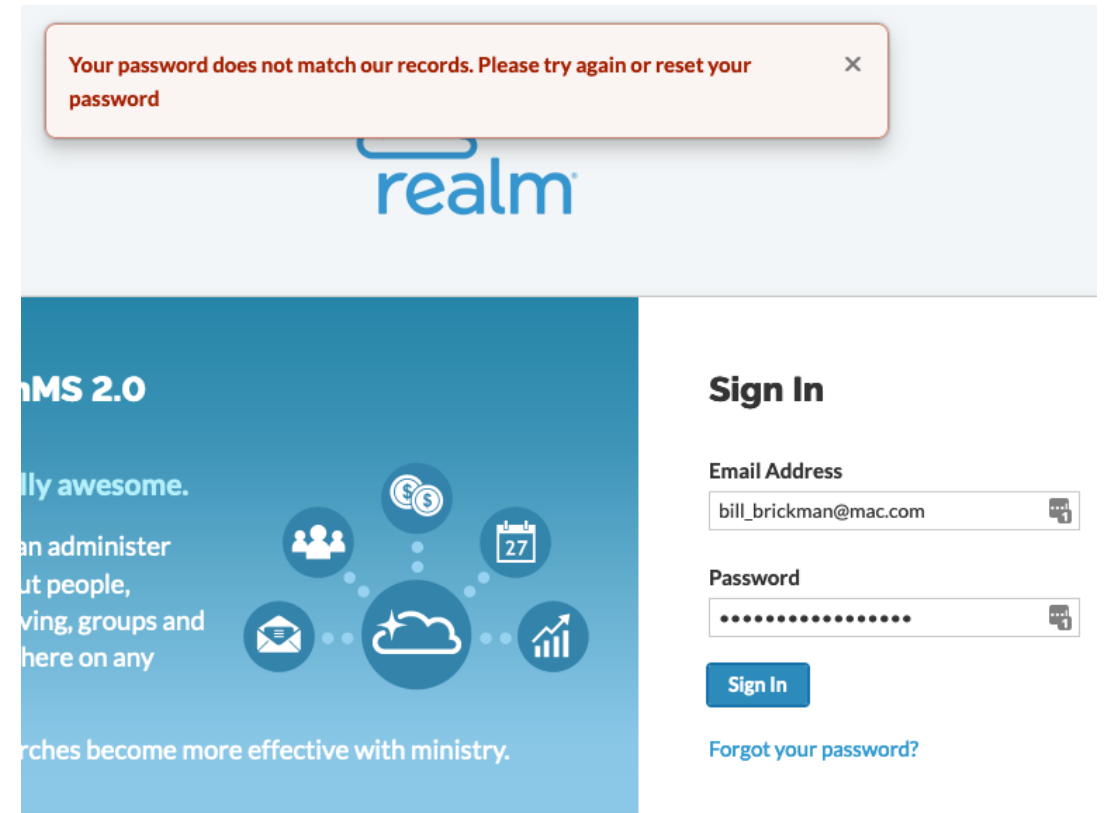
Signing In



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



The screenshot shows the Realm login interface. At the top, a red error message box states: "Your password does not match our records. Please try again or reset your password". Below this is the Realm logo. The main content area features a blue background with the text "MS 2.0" and "ly awesome." followed by icons representing various features like people, calendar, and charts. On the right side, there is a "Sign In" section with an "Email Address" field containing "bill_brickman@mac.com", a "Password" field with masked characters, a "Sign In" button, and a "Forgot your password?" link.

A lit candle in a church setting with other candles in the background.

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

The screenshot shows the 'Giving' page of the 'Parish Of The Epiphany Realm' website. The left-hand side menu includes 'Giving', 'Registration Events', and 'Directory'. The main content area has a blue header with 'Giving' and a 'Then here' callout pointing to the 'Giving' tab. Below the header are buttons for '+ Give', '+ Pledge', 'Giving', and 'Scheduled'. There are also filter buttons: 'Reset Filters', 'Year to date', and 'Nondeductible'. The main content area displays a large blue circle with a document icon and the text 'No giving' and 'Individual co receipts at ar'. A blue callout 'Click here' points to the 'Giving' menu item.

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

Which campaign would you like to pledge to?

2023 Annual Campaign
Pledge

Jan 1, 2023 - Dec 31, 2023

2022 Current Year
Pledge Post-
Stewardship Season

Jan 1, 2022 - Dec 31, 2022

Together Forever
Property

Jan 1, 2019 - Dec 31, 2022

Cancel

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"



2023 Annual Campaign Pledge

Parish of the Epiphany, Winchester MA

Please visit <https://3crowns.org/online-giving> for a guide to using this form and the process of pledging. Or email stewardship@3crowns.org for help with your pledge. Thank you!

How much would you like to pledge?

Amount

\$0.00



AS CAN

SET A SCHEDULE

Start Date

1/1/2023

End Date

12/31/2023

SUMMARY

\$0.00

\$0.00

total pledge

Cancel

Save Pledge

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

2023 Annual Campaign Pledge
Parish of the Epiphany, Winchester MA
Please visit <https://3crowns.org/online-giving> for a guide to using this form and the process of pledging. Or email stewardship@3crowns.org for help with your pledge. Thank you!

How much would you like to pledge?

Amount
\$100.00

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	\$100.00 once a month	\$1,200.00 total pledge
---------	---------------------------------	-----------------------------------

Cancel Save Pledge

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

Thank you for adding your pledge of \$100.00

Frequency: once a month from Jan 1 - Dec 31, 2023

Total Pledge: \$1,200.00

Thank you for your 2023 pledge! If you have any further questions, please visit our website at <https://3crowns.org/online-giving> for help and contact information.

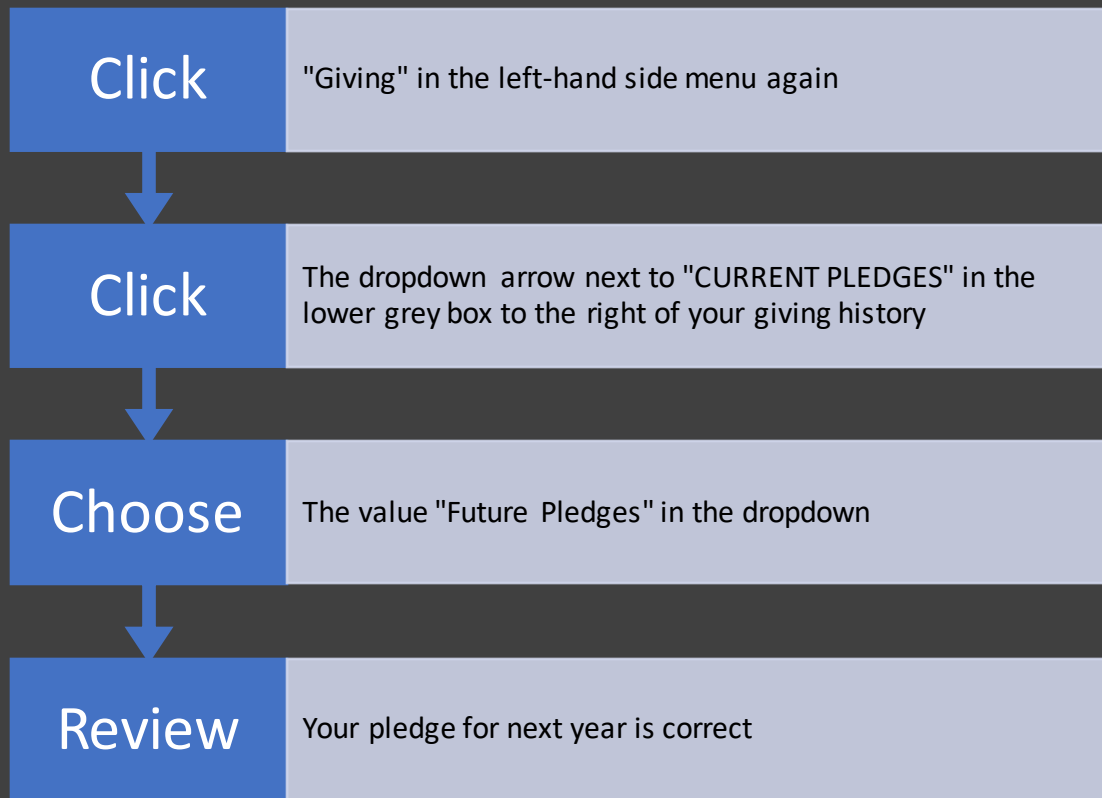
You will receive an email confirmation for this pledge.

Finish

Before you go...

Add an online gift to fulfill this pledge.

Viewing Your Pledge



Giving

Search...

+ Give + Pledge Giving Scheduled

Reset Filters Year to date Nondeductible

No giving history for the selected filters

Individual contributions display here. You can filter and print them as needed at any time.

Menu Here

Your pledge

GIVING NUMBER

None

[Manage Payment Methods](#)

FUTURE PLEDGES

2023 Pledge Pre-pay
Jan 1, 2023 - Dec 31, 2023
Frequency: \$100.00/every month

0%

Total Pledge:	\$1,200.00
Applied:	\$0.00
Remaining:	\$1,200.00

Scheduling Your Pledge Payments



Name _____

Signature _____

Date _____

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"

How much would you like to give?

Amount

Fund

Music Donations

Rector Discretionary

Red Set Commission

Outreach Offering

Youth Ministry Income

2023 Pledge Pre-pay

GIVE ONCE

Gift date

SUMMARY

Cancel Continue

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)

How much would you like to give?

Amount

\$ 100.00

Fund

2023 Pledge Pre-pay

+ Another Fund

GIVE ONCE

GIVE MULTIPLE TIMES

EVERY WEEK

EVERY 2
WEEKS

EVERY
MONTH

TWICE A
MONTH

EVERY 3
MONTHS

Start date

Today

+ END

< September 2022 >

S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

2023 Pledge Pre-pay within 01/01/2023 -

\$100.00

every month

Cancel

Continue

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)

How much would you like to give?

Amount
\$ 100.00

Fund
2023 Pledge Pre-pay

+ 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 2023
12/31/2023

SUMMARY

\$100.00
every month

< December 2023 >

S M T W T F S

3 4 5 6 7 8 9

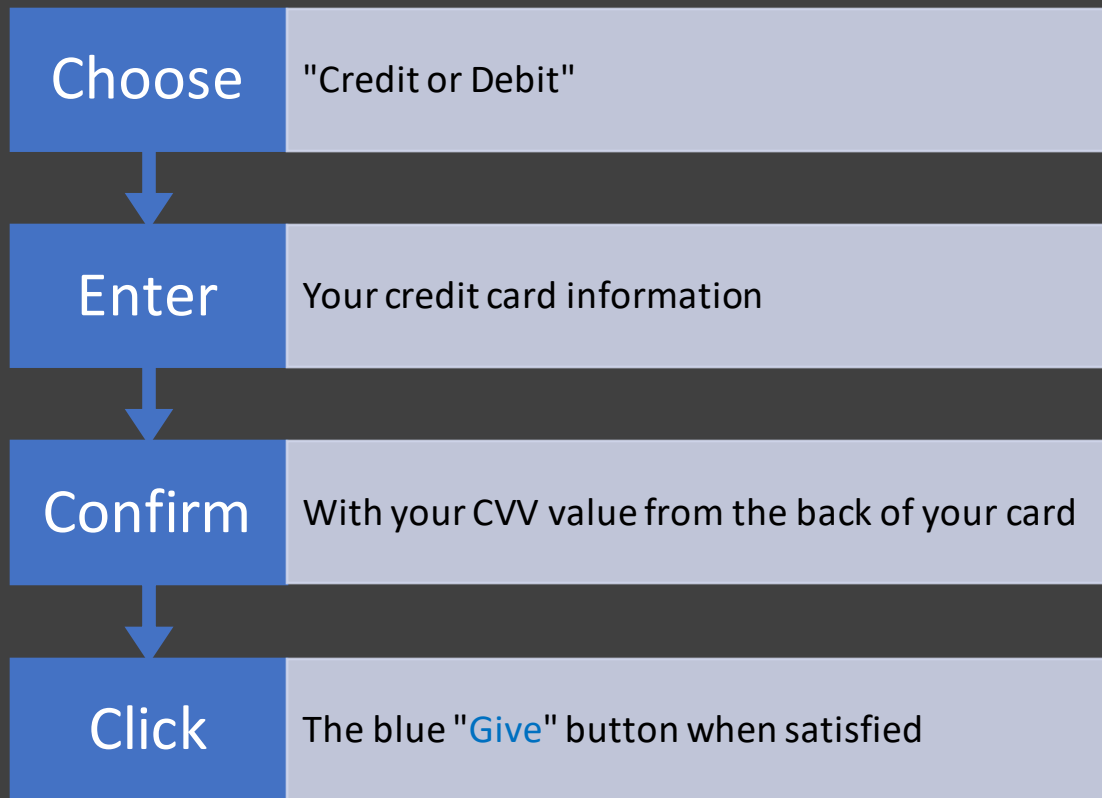
10 11 12 13 14 15 16

17 18 19 20 21 22 23

24 25 26 27 28 29 30

31

Scheduling Payments: Step 4a (with Credit Card)



How would you like to give, Bill?

CREDIT OR DEBIT BANK ACCOUNT

Account Number
5555-1234-5678-9012

Name On Card
William Brickman

Expiration Month: 01 | Expiration Year: 2030 | CVV: 000

Billing Country
United States

Billing Address 1: 1000 Boston Road | Billing Address 2:

Billing City: Billrific | Billing State: Massachusetts | Billing Postal Code: 01001

Contribute an extra \$2.65 per gift to help offset processing costs.

SUMMARY	\$100.00 every month	12 gifts scheduled	\$1,200.00 in total gifts
---------	--------------------------------	------------------------------	-------------------------------------

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)



How would you like to give, Bill?

CREDIT OR DEBIT BANK ACCOUNT

Routing Number: 00000001

Account Number: 555555555

Billing Name: Testing Brickman

Billing Country: United States

Billing Address 1: 1000 Boston Road

Billing Address 2:

Billing City: Billrific

Billing State: Massachusetts

Billing Postal Code: 01001

Contribute an extra \$1.00 per gift to help offset processing costs.

SUMMARY	\$100.00 every month	12 gifts scheduled	\$1,200.00 in total gifts
---------	--------------------------------	------------------------------	-------------------------------------

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

How would you like to give, Bill?

CREDIT OR DEBIT BANK ACCOUNT

Routing Number: 000000001

Account Number: 5555555555

Billing Name: Testing Brickman

Billing Country: United States

Billing Address 1: 1000 Boston Ro.

Billing City: Billrific

Contribute an

SUMMARY

in total gifts

Select all images with **tractors**

Get new test

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

Thank you for scheduling your gift of
\$337.34

Occurs on the 1st day of every month beginning January 1, 2023, and ending December 31, 2023.

Parish of the Epiphany is most grateful for your generous gift.

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

Finish

Parish Of The Epiphany
Your gift is scheduled with Parish Of The Epiphany
To: William Samuel Merrill Brickman,
Reply-To: Maryann Badejo

Inbox - iCloud



Your gift is scheduled with Parish Of The Epiphany

The following gift has been scheduled:

\$334.00 to 2023 Pledge Pre-pay
\$3.34 to Processing Costs

Account Description: Checking ****1134

Account Type:

Account Number: ****1134

Frequency: Monthly

First Gift: 01/01/2023

Last Gift: 12/01/2023

If you didn't authorize these changes, please contact our office.

Thank you for your continued support.

Sincerely,
Your friends at Parish Of The Epiphany

View your [giving history](#) to maintain your gifts. If you need to cancel a recurrence, click the **Scheduled** tab followed by *******. Then, select **Cancel**.

If you need more assistance or need to set up an account, contact our office at (781) 729-1922

This message was sent to bill_brickman@mac.com by ACS Technologies on behalf of this organization.

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

Parish Of The Epiphany Realm

Giving

+ Give + Pledge Giving Scheduled

Reset Filters Active, On Hold

\$337.34 gift scheduled for Jan 1, 2023

\$334.00 to 2023 Pledge
\$3.34 to Processing Costs

Monthly on the 1st
Last gift on Dec 1, 2023
12 gifts remaining ending on Dec 31, 2023
Checking ***1134

- Tasks
- Giving
- Reporting
- Registration Events
- Profiles
- Groups
- Check-In
- Pathways
- Volunteers
- Users & Permissions
- Settings

1

2

31

Cancelling a Payment Schedule

Cancelling a Schedule:

Click

"Giving" in the left-hand side menu

Toggle

From "Giving" to "Scheduled"

Click

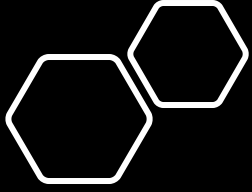
On the "... " icon in the corner of the gift listed

Choose

"Cancel" in the dropdown menu and **Confirm**

The screenshot shows the 'Giving' page with a search bar and navigation tabs for '+ Give', '+ Pledge', 'Giving', and 'Scheduled'. A gift entry is displayed: '\$337.34 gift scheduled for Jan 1, 2023'. Below this, it lists '\$334.00 to 2023 Pledge' and '\$3.34 to Processing Costs'. The gift is scheduled 'Monthly on the 1st' with a 'Last gift on Dec 1, 2023' and '12 gifts remaining ending on Dec 31, 2023'. The card is attributed to 'Added by Bill Brickman on Sep 16, 2022'. A dropdown menu is open in the top right corner of the gift card, showing options: 'Edit', 'Place On Hold', and 'Cancel'. A callout box with an arrow points to the three-dot menu icon in the top right corner of the gift card, containing the text '"... " here'.

This screenshot shows the same gift entry as the previous one, but with a confirmation dialog box overlaid. The dialog has a title bar 'Cancel Scheduled Gift' and a question: 'Are you sure you want to cancel this scheduled gift?'. At the bottom of the dialog are two buttons: 'Confirm' and 'Cancel'. The background is dimmed to show the gift details and the user's name 'Sep 16, 2022'.



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

