



## How to make a Reoccurring Gift Via Realm

### Part 2

\*Instructions are circled\*

**This is the how to accomplish the promise.**

You have now successfully set up your pledge following the part 1 instructions. If you have not done so, please do that before continuing, or if you have questions, contact Mary Leffler. After you have completed **How to make a Pledge (Part 1)** Follow these steps to make your reoccurring monetary gift.

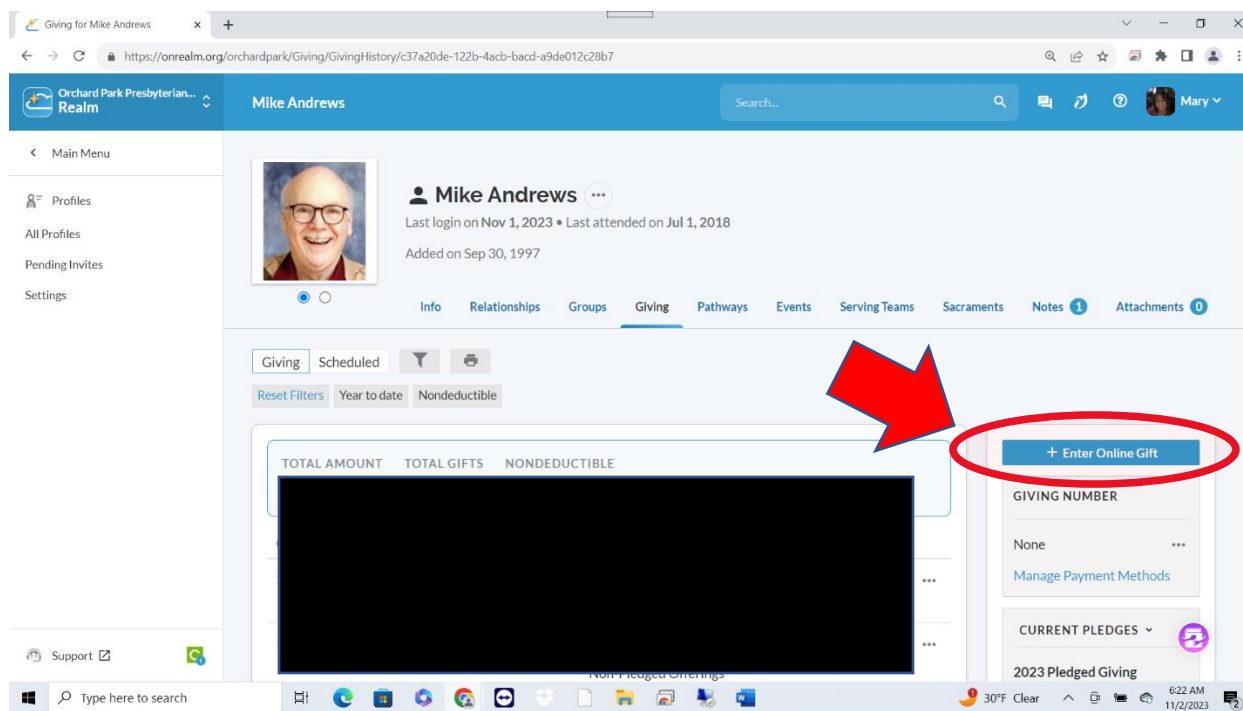
\*\*\*If you are using a mobile device such as an ipad, tablet, phone please go to the end of the documents, and see step 9\*\*\*

\*\*Steps 1 – 3 are for a laptop or desktop computer, using realm log in, not realm connect\*\*

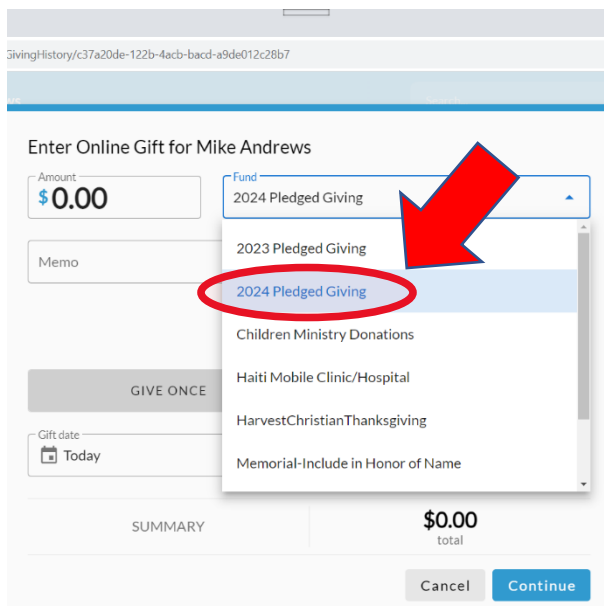
**Step 1)** When you are signed into your account, you will see your profile with a horizontal menu bar, you want to select Giving.

The screenshot shows a web browser window displaying the user profile for Mike Andrews on the Orchard Park Presbyterian Church Realm. The browser address bar shows the URL: https://onrealm.org/orchardpark/individual/info/c37a20de-122b-4acb-bacd-a9de012c28b7. The page header includes the Orchard Park Presbyterian Church logo and the user's name, Mike Andrews, with a search bar and a user profile icon for Mary. The main content area shows a profile card for Mike Andrews, including a photo, name, last login date (Nov 1, 2023), and a date added (Sep 30, 1997). Below the profile card is a horizontal menu bar with options: Info, Relationships, Groups, Giving, Pathways, Events, Serving Teams, Sacraments, Notes (1), and Attachments (0). The 'Groups' option is circled in red, and a red arrow points to it from the right. Below the menu bar is a 'Personal Information' section with fields for Name (Mr. Michael E. Andrews (Mike)), Home Address (17058 Loch Cir, Noblesville, IN 46060-4318), Home Phone ((317) 939-1800), and Primary Email (mandrews12555@gmail.com). To the right of the personal information is a 'GIVING NUMBER' section with a dropdown menu set to 'None'. Below that is a 'BACKGROUND CHECKS' section with a dropdown menu set to '...' and a note that no background checks have been recorded. At the bottom is a 'FAMILY' section with a dropdown menu set to '...' and a profile card for Susan Andrews, Head.

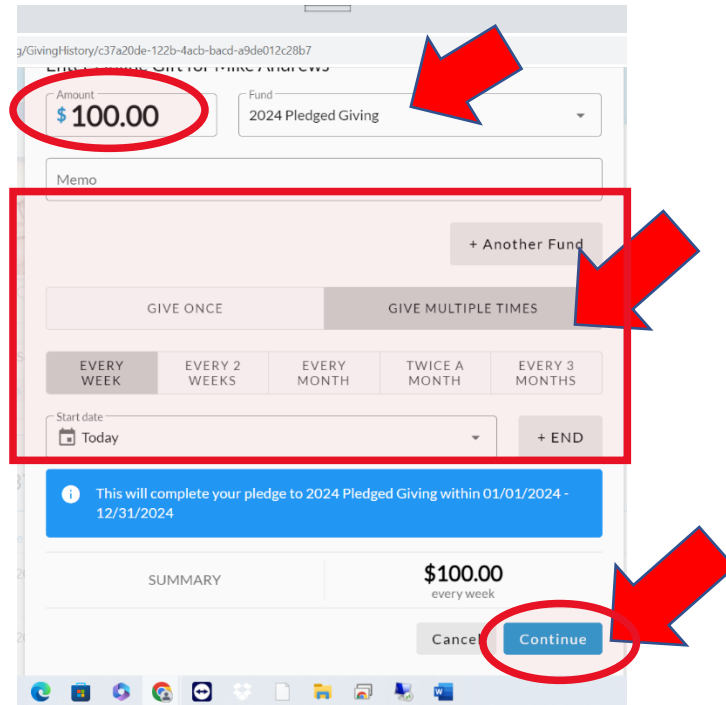
**Step 2)** Once you have selected giving on your home page. You will see this screen. You might see previous gifts or nothing, that is ok. From This screen, you want to select (+ Enter Online Gift), on the right-hand side.



**Step 3)** Once you have selected (+ Enter Online Gift). You will see this screen. You want to select 2024 Pledged Giving.

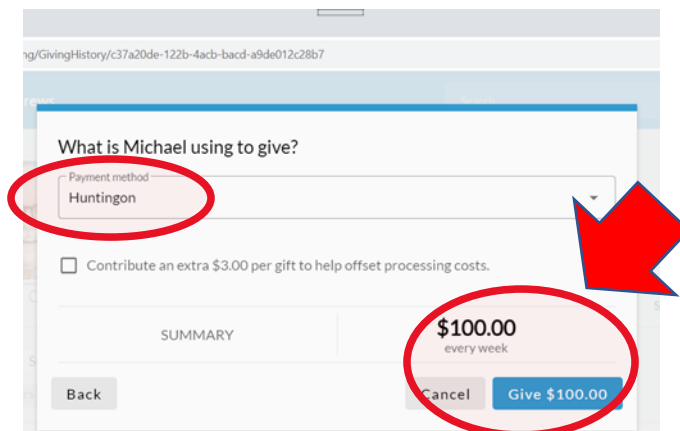


**Step 4)** Once you have completed step 3, you will see this screen. This is where you will enter the amount you want to take out of your accounts. Select give multiple times, choose the frequency, starting date, ending date, and then select continue.



**Step 5)** Once you have set up how much you would like to give and the frequency of that gift, we then need to select the account you want to use.

- As you can see, a bank account is already set up on this account. If you already have an account set up, go ahead, select it, and go to the next step. If you need to create an account, go to step 6.



**Step 6)** If you need to set up an account follow these steps.

- If you would like to set up a bank account, follow these instructions. You are going to select enter a different payment method, select bank account, add your routing, and account number, your name, and address, check the boxes. Then select save.

What is Michael using to give?

Payment method  
Enter a different payment method

CREDIT OR DEBIT    BANK ACCOUNT

Routing Number    Account Number

Billing Name  
Mike Andrews

Billing Address 1  
17058 Loch Cir    Billing Address 2

Billing City  
Noblesville    Billing State  
Indiana    Billing Postal Code  
46060-4318

I understand and agree to the [documentation requirements](#) for managing payment methods.

Contribute an extra \$3.00 per gift to help offset processing costs.

- If you would like to set up a credit card, follow these instructions. Enter your account number, name on card, card info, address, and check the boxes. Then Select save.

What is Michael using to give?

Payment method  
Enter a different payment method

CREDIT OR DEBIT    BANK ACCOUNT

Account Number

Name On Card  
Mike Andrews

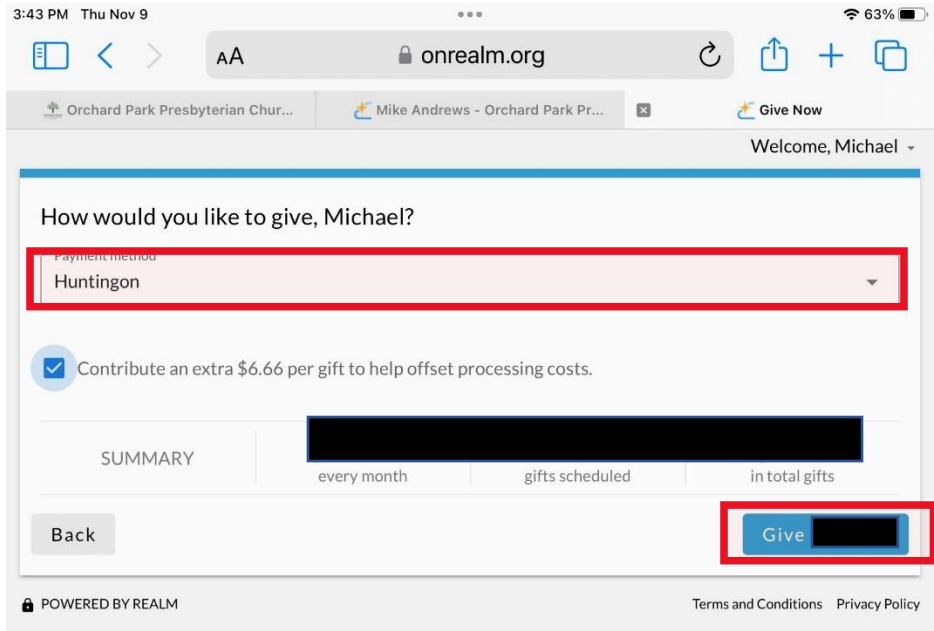
Expiration Month  
11    Expiration Year  
2023    CVV

Billing Address 1  
17058 Loch Cir    Billing Address 2

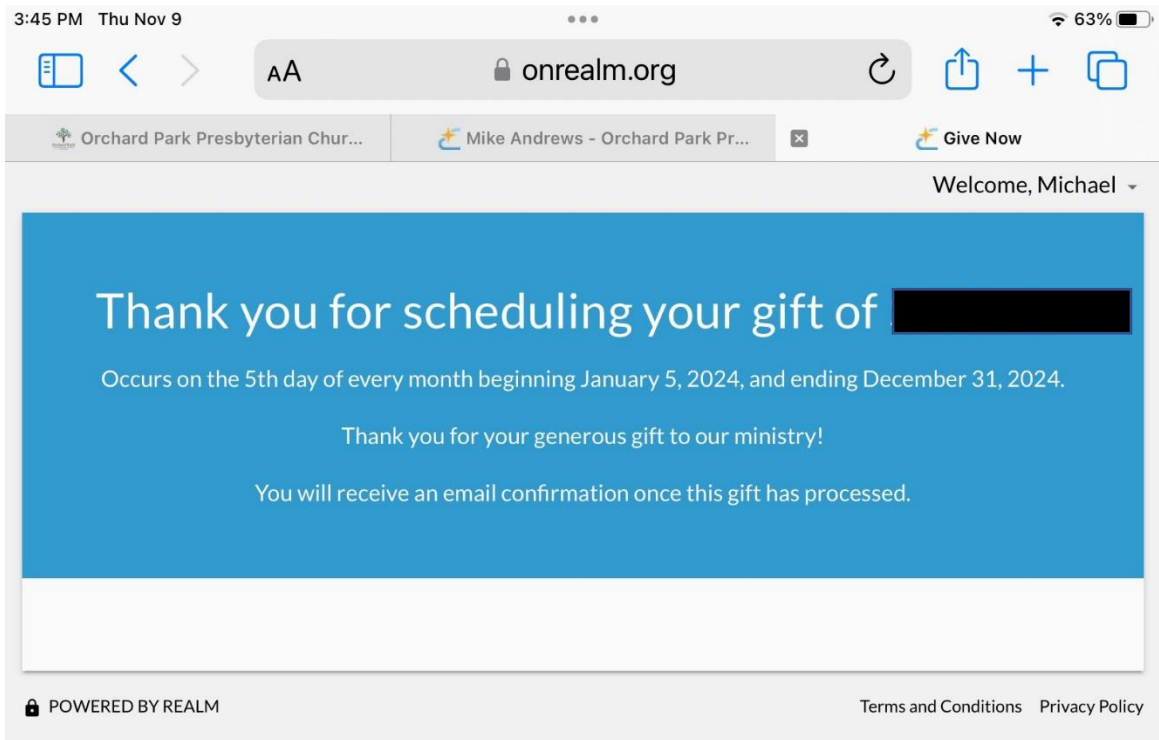
Billing City  
Noblesville    Billing State  
Indiana    Billing Postal Code  
46060-4318

I understand and agree to the [documentation requirements](#) for managing payment methods.

**Step 7)** Once you have set up your account, you want to select that account. And then when you are ready, select the give button.



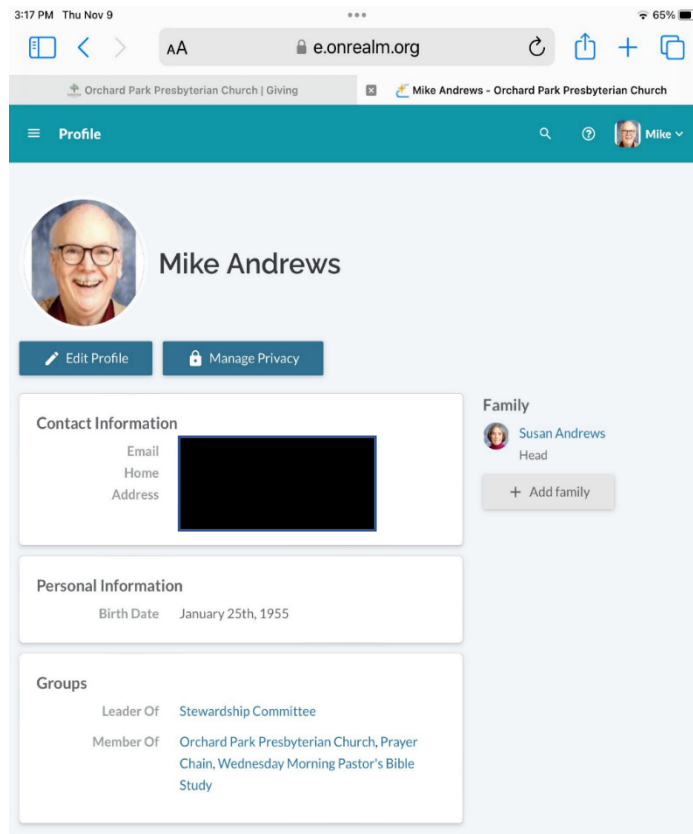
**Step 8)** You have finished part 2. You have now completed your promise and will be making a monetary gift to OPPC. If you have any questions. Please reach out to Mary Leffler.



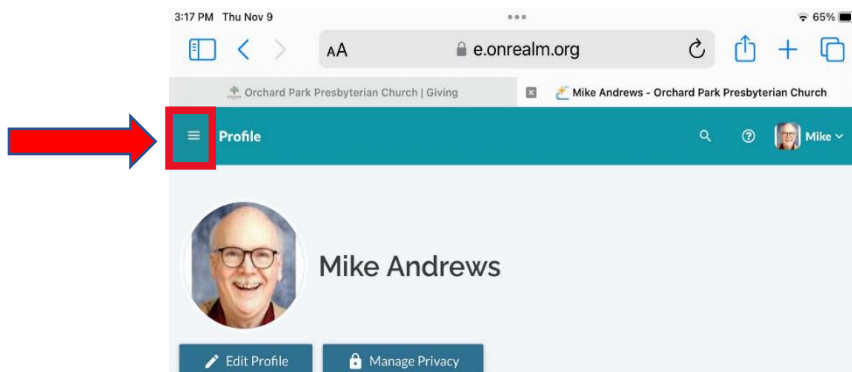
**These following steps are made if you are using a mobile device such as an iPad, tablet, or phone.**

**\*This is done using realm connect. If you are not using a mobile device, please see steps 1-8\***

**Step 9)** This is the home page using a mobile device, when you log into realm connect.



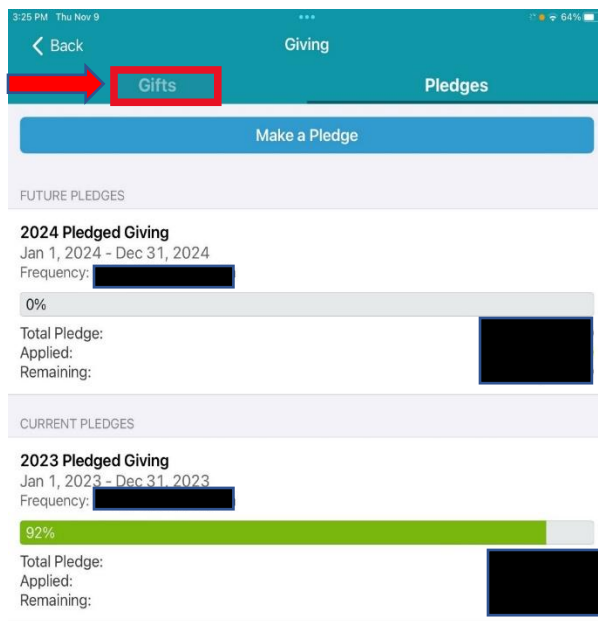
**Step 10)** From here you want to select the small stack of lines and select giving.



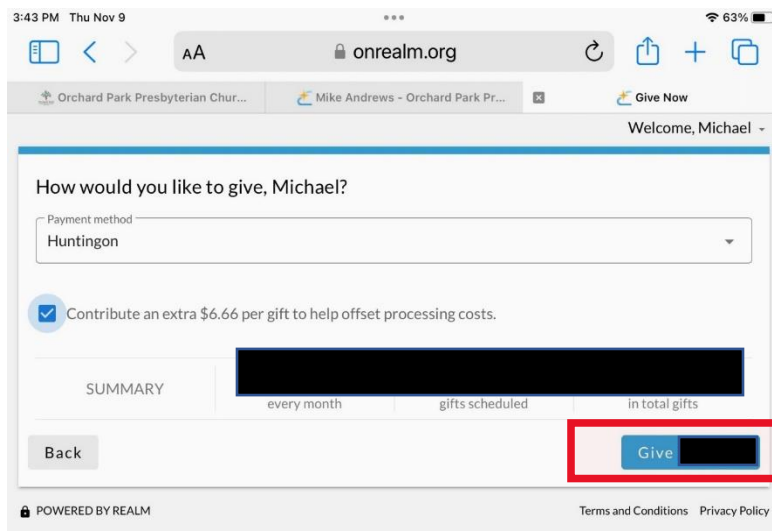
**Step 11)** Once you have selected giving you will see a page that shows you all your recent *pledges* and where you are on your *giving* goal.

\*Remember, pledge is a promise, giving is the how to make it happen.\*

You want to make sure you select gifts. Then go to step 12.



**Step 12)** Once you select gifts, you will be brought to the section of how you would like to give your gift. What bank account or credit card are you taking this out of? If you do not have an account set up, please see step 6. If you have an account set up, you should see the frequency of your 2024 pledge that you made from part 1. Go ahead and select your account and then select give at the bottom. If you do not see your frequency or the amount you want to pledge, then follow steps 3-5.



**Step 13)** You have finished part 2. You have now completed your promise and will be making a monetary gift to OPPC. If you have any questions. Please reach out to Mary Leffler.

3:45 PM Thu Nov 9 AA onrealm.org 63%

Orchard Park Presbyterian Church Mike Andrews - Orchard Park Pr... Give Now

Welcome, Michael

**Thank you for scheduling your gift of** [REDACTED]

Occurs on the 5th day of every month beginning January 5, 2024, and ending December 31, 2024.

Thank you for your generous gift to our ministry!

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

POWERED BY REALM [Terms and Conditions](#) [Privacy Policy](#)

Your gift is scheduled with Orchard Park Presbyterian Church Inbox ☆

**D** Orchard Park Presbyterian Church 3:45 PM to me ↩ ...



**Your gift is scheduled with Orchard Park Presbyterian Church**

The following gift has been scheduled:

[REDACTED]

**Frequency:** Monthly  
**First Gift:** 01/05/2024  
**Last Gift:** 12/05/2024

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

Thank you for your continued support.

Sincerely,  
Your friends at Orchard Park Presbyterian Church

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 (317) 844-1107