

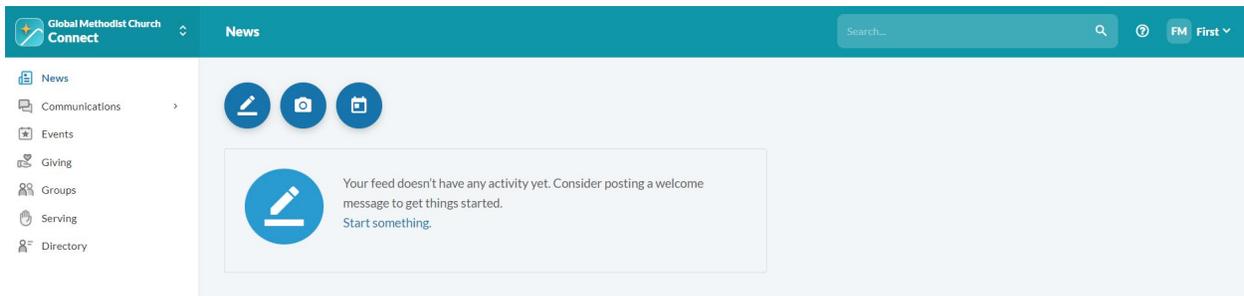
Part 4: Giving in Realm: Giving Management

These instructions will cover viewing your giving history and managing any scheduled payments that you have set up. To process a one-time payment or schedule recurring payments, please refer to the previous Giving in Realm instructions.

Your church's giving history is available to view in your account. This includes:

- Online giving through your Realm account.
- Checks for connectional funding sent to the Global Methodist office which are then scanned into Realm and matched to your account.
- Prior years' giving history that was imported into Realm.

To view your giving, select Giving on the left of the home screen.



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Your year to date giving will be displayed.



Add an image



Methodist Church

Added on Feb 13, 2024

[Info](#) [Relationships](#) [Personnel](#) [Giving](#) [Notes](#) 0 [Attachments](#) 0

[Giving](#) [Scheduled](#)  

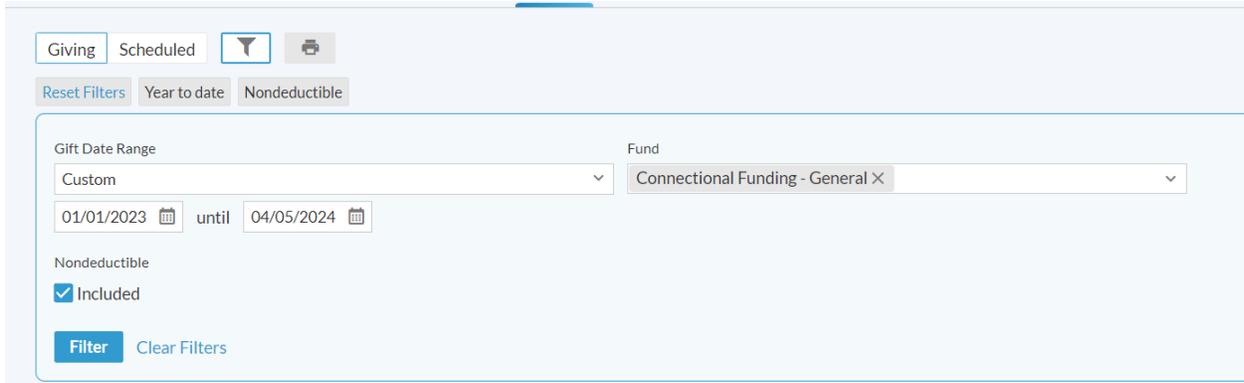
[Reset Filters](#) [Year to date](#) [Nondeductible](#)

TOTAL AMOUNT	TOTAL GIFTS
\$58.32	2

Gift Date	Gift Type/Ref#	Fund	Amount
04/02/2024	Check : 185 	Connectional Funding - General Mar	\$29.16 ...
03/04/2024	Check : 177 	Connectional Funding - General Feb	\$29.16 ...

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To view older gifts, click the filter button , and edit the date range. Data goes back to 2023. You can also choose to filter for only a certain fund--i.e. connectional funding, disaster relief, etc.--if desired. Now click “Filter,” and the new date range will be applied.



The screenshot shows a web interface for filtering gifts. At the top, there are tabs for "Giving" and "Scheduled", and a filter icon (a funnel) which is highlighted with a blue box. Below the tabs are buttons for "Reset Filters", "Year to date", and "Nondeductible". The main filter area is titled "Gift Date Range" and "Fund". Under "Gift Date Range", there is a dropdown menu set to "Custom" and two date input fields: "01/01/2023" and "04/05/2024", with "until" between them. Under "Fund", there is a dropdown menu set to "Connectional Funding - General". Below these fields, there is a "Nondeductible" section with a checked checkbox for "Included". At the bottom of the filter area, there are two buttons: "Filter" and "Clear Filters".

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Available information for each gift is:

- Gift date
- Gift type, i.e. check, online, etc.
- The fund to which your gift was applied
- Amount

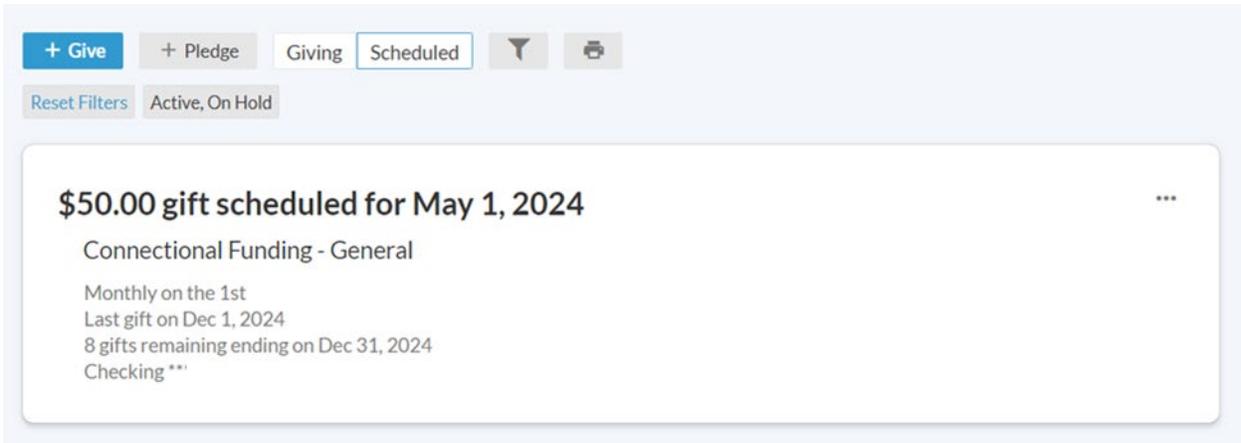
If your gift was a check and was received since March 1, 2024, a paperclip icon next to the check number in the "gift type" column indicates a scanned image of the check. Realm uses these to automatically match your future checks to your church.

If you have questions regarding the giving history shown in your account, please contact finance@globalmethodist.org.

TOTAL AMOUNT		TOTAL GIFTS	
\$230.10		8	
Gift Date	Gift Type/Ref#	Fund	Amount
04/02/2024	Check: 185 	Connectional Funding - General Mar	\$29.16 ...
03/04/2024	Check: 177 	Connectional Funding - General Feb	\$29.16 ...
12/18/2023	Check: 149	Connectional Funding - General GC Dec	\$28.63 ...
11/28/2023	Check: 141	Connectional Funding - General GC Nov	\$28.63 ...
11/17/2023	Check: 135	Connectional Funding - General GC Oct	\$28.63 ...
09/25/2023	Check: 122	Connectional Funding - General	\$28.63 ...

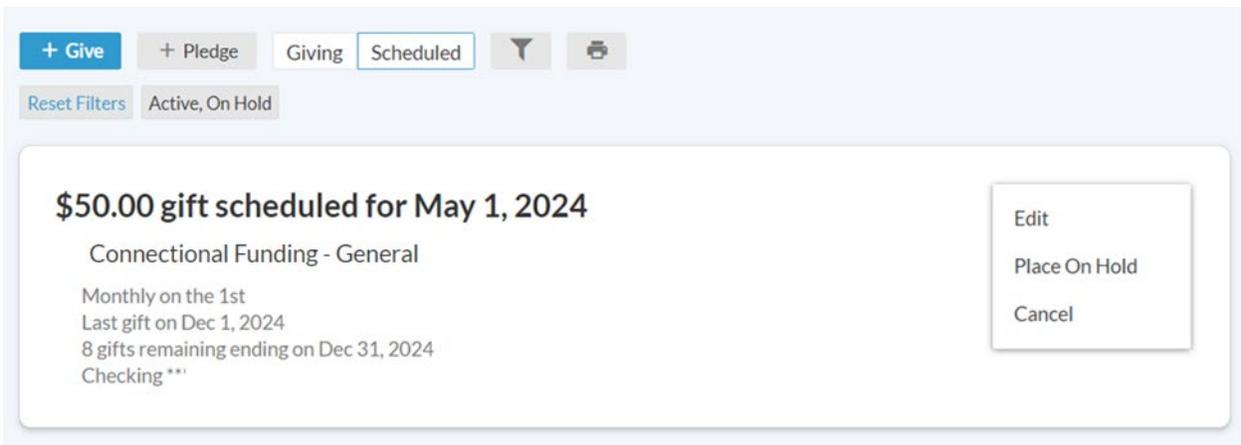
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To view active recurring payments or one-time payments that are scheduled for the future, navigate to Scheduled.



The screenshot shows a web interface for managing giving. At the top, there are navigation buttons: '+ Give' (blue), '+ Pledge' (grey), 'Giving' (white), and 'Scheduled' (white with a blue border). To the right are a filter icon and a print icon. Below these are 'Reset Filters' and 'Active, On Hold' buttons. The main content area displays a card for a '\$50.00 gift scheduled for May 1, 2024'. The card details include: 'Connectional Funding - General', 'Monthly on the 1st', 'Last gift on Dec 1, 2024', '8 gifts remaining ending on Dec 31, 2024', and 'Checking ***'. A three-dot menu icon is in the top right corner of the card.

From there, you can click the three dots on the top right of the record to edit, place on hold, or cancel any scheduled gifts.



This screenshot is identical to the one above, but with the three-dot menu open on the right side of the card. The menu contains three options: 'Edit', 'Place On Hold', and 'Cancel'.

If selecting “edit,” you can not change the frequency or day of the month that has already been established when you set up your recurring payment. If you need to do so, you should cancel the scheduled gift and initiate a new one. You can, however, add an end date to the schedule. For example, if you forgot to end your gift at the end of the current year since you will be recalculating in January, you can add the end date now.

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Enter Online Gift for

Church

Amount **\$ 50.00**

Fund
General Church 1% Connectional Funding

Memo

+ Another Fund

GIVE ONCE | GIVE MULTIPLE TIMES

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

Start date
Today

Stop giving after
Date

End date
12/31/2024



SUMMARY	\$50.00 every month	7 gifts scheduled	\$350.00 in total gifts
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Cancel

Continue

To temporarily pause a recurring gift, select “place on hold,” enter the reason and click “confirm.”

Place Scheduled Gift on Hold

Are you sure you want to place this scheduled gift on hold?

To proceed, please enter the reason for placing this gift on hold: *

Confirm

Cancel

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You will receive confirmation that the hold has been activated and “on hold” will show up in the record until you reactivate it.

The screenshot displays a web interface for managing gifts. At the top, there are navigation buttons: '+ Give', '+ Pledge', 'Giving', and 'Scheduled'. A filter icon and a print icon are also present. Below these are 'Reset Filters' and 'Active, On Hold' buttons. A notification banner at the top right states 'Gift has been placed on hold.' with a close button. The main content area features a card for a '\$50.00 gift' with an 'ON HOLD' status. The gift is for 'Connectional Funding - General' and is scheduled 'Monthly on the 1st'. It notes 'Last gift on Dec 1, 2024' and '8 gifts remaining ending on Dec 31, 2024'. The payment method is 'Checking**'. To the right of the gift card is a sidebar with a '2023 Contribution Statement' button and a 'GIVING INFORMATION' section containing a 'Manage Payment Methods' link.

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To reactivate, click the three dots in the top right of the gift record, and click “reactivate.”

\$50.00 gift ON HOLD

Connectional Funding - General

Monthly on the 1st
Last gift on Dec 1, 2024
8 gifts remaining ending on Dec 31, 2024
Checking ***

Reactivate
Cancel

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Review the gift information, and click Continue if satisfied.

How much would you like to give?

Amount **\$50.00**

Fund **General Church 1% Connectional Funding**

Memo **Recurring**

[+ Another Fund](#)

GIVE ONCE | **GIVE MULTIPLE TIMES**

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

Start date **5/1/2024**

Stop giving after **Date**

End date **12/31/2024**

SUMMARY	\$50.00 every month	8 gifts scheduled	\$400.00 in total gifts
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[Cancel](#) [Continue](#)

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You will verify your payment method in the next screen. When you have selected the desired method, click the button that says “Save \$[amount].” This means “save changes.”

How would you like to give?

Payment method
Checking ***

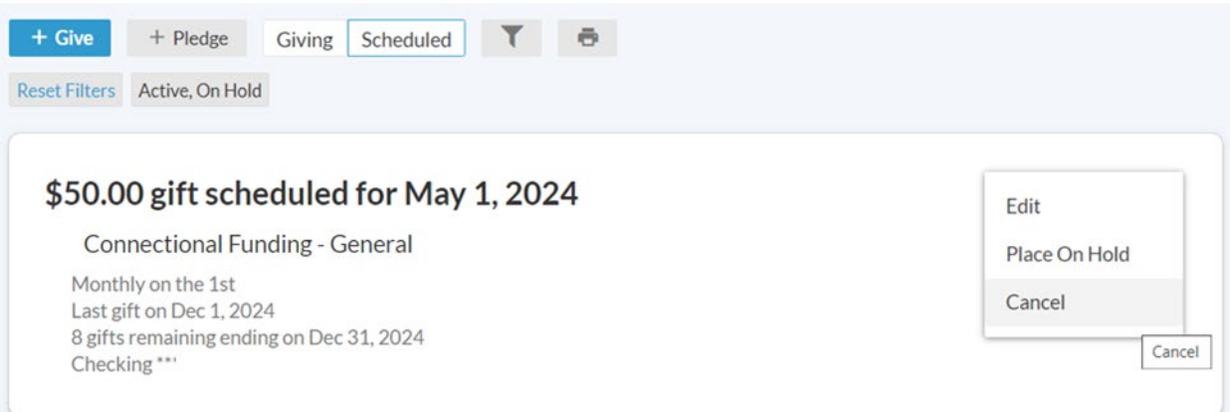
Contribute an extra \$0.50 per gift to help offset processing costs.

SUMMARY	\$50.00 every month	8 gifts scheduled	\$400.00 in total gifts
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Back Cancel Save \$50.00

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To cancel your future gift, be it a one-time gift scheduled for a date in the future or the remaining gifts on a recurring payment, click the three dots and select “cancel.”



The screenshot shows a web interface for managing gifts. At the top, there are navigation buttons: '+ Give' (blue), '+ Pledge' (grey), 'Giving' (white), and 'Scheduled' (white with a blue border). To the right are a funnel icon and a printer icon. Below these are 'Reset Filters' and 'Active, On Hold' buttons. The main content area displays a gift card with the following details:

- \$50.00 gift scheduled for May 1, 2024**
- Connectional Funding - General
- Monthly on the 1st
- Last gift on Dec 1, 2024
- 8 gifts remaining ending on Dec 31, 2024
- Checking ***

On the right side of the gift card, there is a dropdown menu with three options: 'Edit', 'Place On Hold', and 'Cancel'. The 'Cancel' option is highlighted in grey. A small 'Cancel' button is also visible at the bottom right of the dropdown menu.

It will then ask for confirmation.

Cancel Scheduled Gift

Are you sure you want to cancel this scheduled gift?

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A pop-up will confirm cancelation, and the scheduled gift will no longer show up in your scheduled gifts list.

The screenshot shows a web interface for managing giving. At the top, there are navigation buttons: '+ Give', '+ Pledge', 'Giving', and 'Scheduled' (which is selected). There are also filter icons (a funnel and a printer) and a 'Reset Filters' button. Below the navigation, there are buttons for 'Active, On Hold'. On the right side, there is a notification box that says 'Gift has been canceled.' with a close button (X). Below the notification, there is a '2023 Contribution Statement' button. Underneath that, there is a 'GIVING INFORMATION' section with a 'Manage Payment Methods' link. The main content area is a large white box with a blue icon of two hands holding a heart, surrounded by plus signs and a gift icon. Below the icon, the text reads: 'There are no recurring gifts to display. Whenever a gift is scheduled, you will see a summary of its recurrences here.' There is a 'Learn more' link below the text.