

Love Grows Here



Foothills  
Unitarian  
Universalist  
Fellowship

# Foothills Unitarian Universalist Fellowship

## How to set up a pledge on Realm

It's time to pledge for the upcoming fellowship year

The following pages will guide you through the steps to make a pledge and create an automatic donation to fulfill the pledge



If you don't have a Realm account please contact [office@fuuf.org](mailto:office@fuuf.org) to get one set up

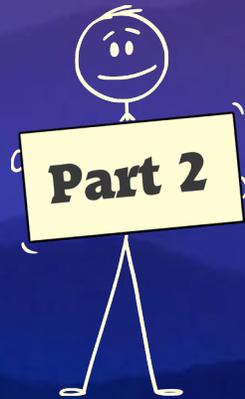
# Pledging and donating to FUUF

Pledges and donations are 2 separate functions

Pledges are the promise, and the donations are the monetary fulfillment of the promise



Record the amount  
of your pledge



Set up the automatic  
scheduled donation

**Note:** If you set up your automated donation correctly, you will receive a confirmation email every time the money is deducted

# For Mobile users...

The instructions in this doc have screenshots taken on a computer to help guide you through the process, but they will also work for mobile devices

There may be slight differences in wording and location of buttons but the process is the same

Start by opening the Realm app instead of “**opening the browser**” then follow the computer instructions



# Steps for recording a pledge on Realm

Pictures and details for each step are on the following pages.



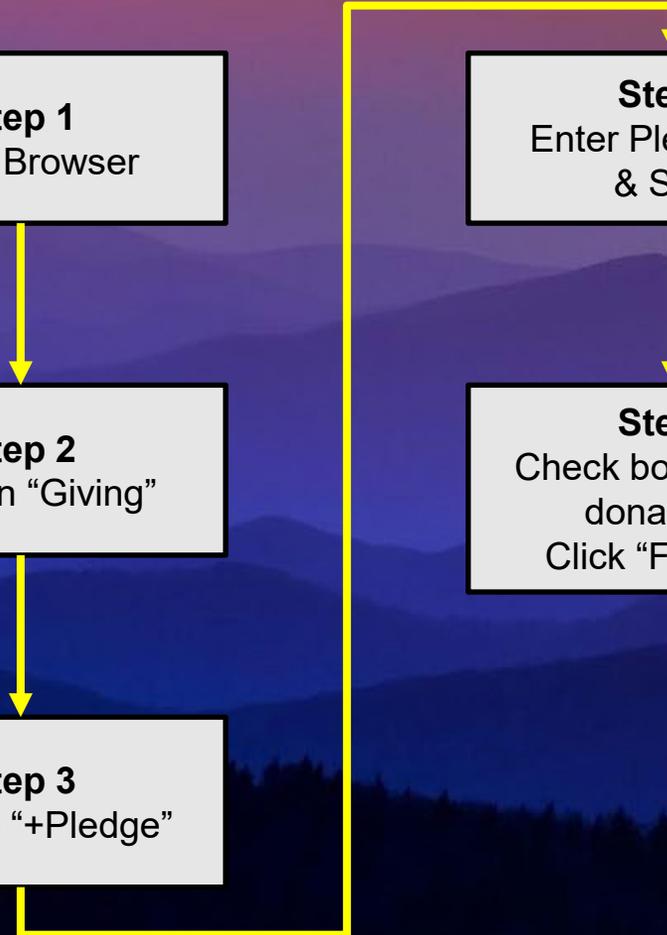
**Step 1**  
Open Browser

**Step 2**  
Click on "Giving"

**Step 3**  
Click on "+Pledge"

**Step 4**  
Enter Pledge Info  
& Save

**Step 5**  
Check box to make  
donation &  
Click "Finished"

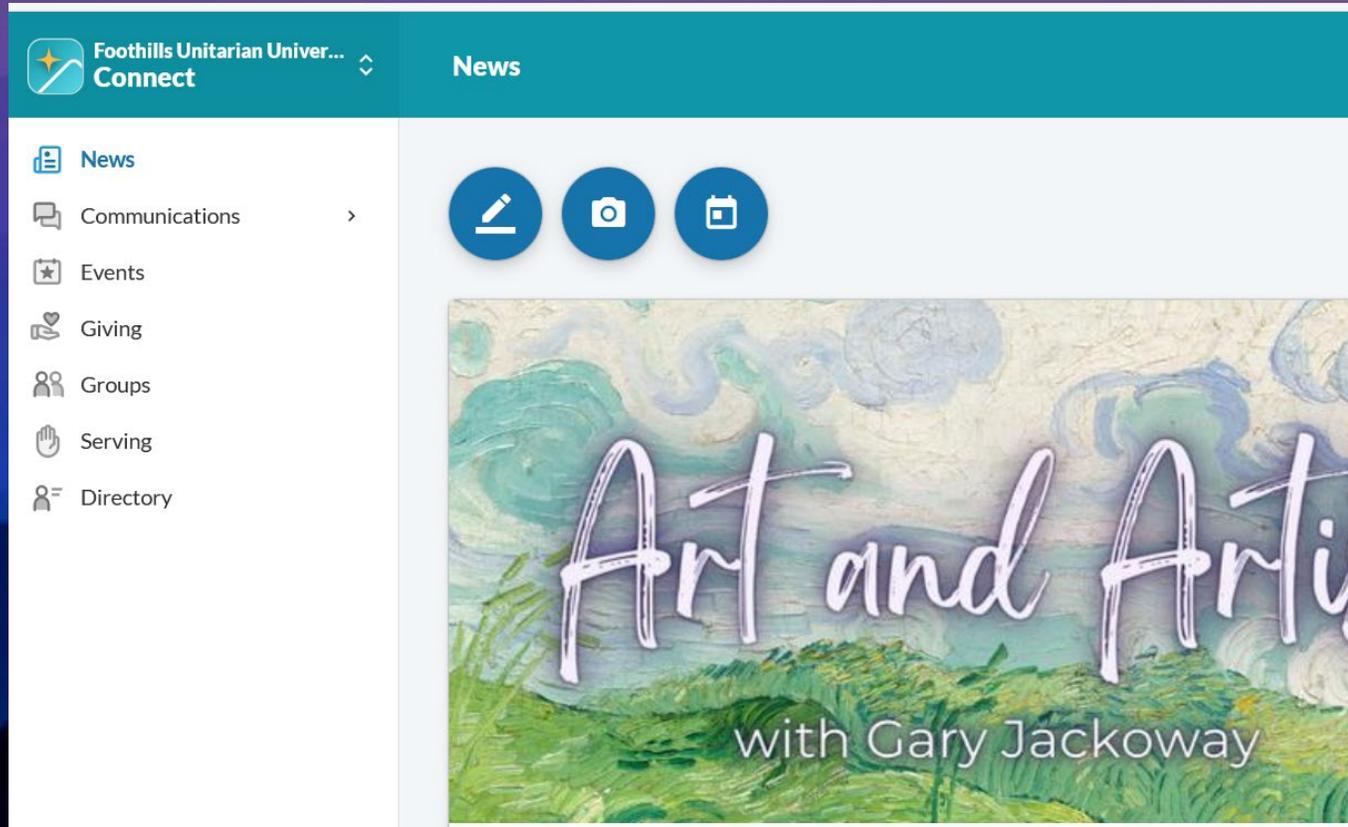




# Record a Pledge – Step 1

On your computer open realm in a web browser

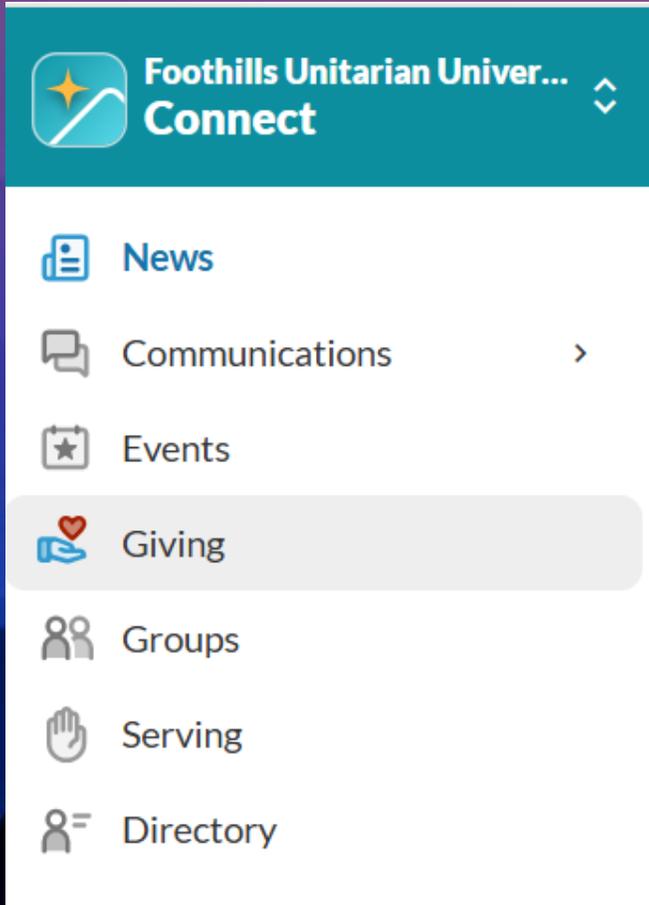
<https://onrealm.org>





# Record a Pledge – Step 2

Click on “Giving” from the menu on the left side of the screen





# Record a Pledge – Step 3

Click “+Pledge” button

**Giving**

[+ Give](#) [+ Pledge](#) [Giving](#) [Scheduled](#) [▼](#) [🖨](#)

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



# Record a Pledge – Step 4

On the pledge screen enter

- the **amount** you want to pledge
- the **frequency** you plan to donate (annual, every 3 months, 2x / month, 1x / month, every 2 weeks, 1x / week)
- **start & end dates**

Click “**Save Pledge**”

Pledge Year 25/26  
Foothills Unitarian Universalist Fellowship  
Pledge in thanksgiving for all God's blessings.

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: Today      End Date: 6/30/2026

SUMMARY	<b>\$100.00</b> once a month	<b>\$1,200.00</b> total pledge
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Cancel    **Save Pledge**

**This does NOT set up the actual donation – it only records the pledge**



# Record a Pledge – Step 5

Once you've saved your pledge you should see a confirmation screen

If you want to set up your donation NOW click the checkbox to “**Add an online gift...**” this will take you to Part 2 - making a donation

Click “**Finished**”

Your pledge has been recorded  
Congratulations and thank you!

A screenshot of a confirmation screen with a blue background. The text reads: "Thank you for adding your pledge of \$100.00", "Frequency: once a month from Jul 29, 2025 - Jun 30, 2026", "Total Pledge: \$1,200.00", "Your pledge has made a positive difference in the lives of others and our faith. Thank you.", and "You will receive an email confirmation for this pledge." Below this is a grey button labeled "Finish". At the bottom of the screenshot, on a white background, is the text "Before you go..." followed by a checkbox and the text "Add an online gift to fulfill this pledge."

Thank you for adding your pledge of \$100.00

Frequency: once a month from Jul 29, 2025 - Jun 30, 2026

Total Pledge: \$1,200.00

Your pledge has made a positive difference in the lives of others and our faith. Thank you.

You will receive an email confirmation for this pledge.

Finish

Before you go...

Add an online gift to fulfill this pledge.





# Scheduling an automatic donation

To set up your pledge donation there are 2 ways to do it  
The path you use will depend on whether or not you have a current active donation

**Yes** = **Use Path 1**: You have an active automated donation for the current pledge year and you want to set it up for the upcoming pledge year

**No** = **Use Path 2**: You do not have an active automated donation

The following pages will guide you through the steps

# Scheduling an automatic donation

Pictures and details for each step are on the following pages.



**Quit**  
Make donations manually

## Complete Donation Set Up

Path 1-Step 6-b  
Update donation - Continue & you are done



## Update Existing Donation - pg 13

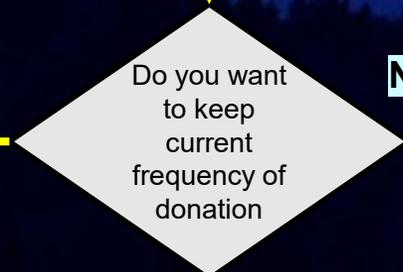
Path 1-Step 1  
Open Browser

Path 1-Step 2  
Click "Giving"

Path 1-Step 3  
Click "Scheduled" & find active donation

Path 1-Step 4  
Click "..."

Path 2-Step 5  
Click "Edit"



You will automatically proceed to Path 2-Step 3

## End Existing Donation

Path 1-Step 6-a  
Update end date & Continue

## Create New Donation - pg 24

Path 2-Step 1  
Open Browser

Path 2-Step 2  
Click "Giving"

Path 2-Step 3  
Click "+Give"

Path 2-Step 4  
Enter donation info

Path 2-Step 5  
Enter Payment info

Path 2-Step 6  
Save & you are done



# Scheduling an automatic donation



**NO:** If you want to make your donations by check, cash or text manually you can quit here. There is no more to do

**YES:** If you want to set up an automated donation in Realm proceed to the next page



# Scheduling an automatic donation



**YES:** Proceed to the **next page** – Path 1 - Update an Existing Donation

**NO:** Proceed to **page 24** – Path 2 – Create a New Donation

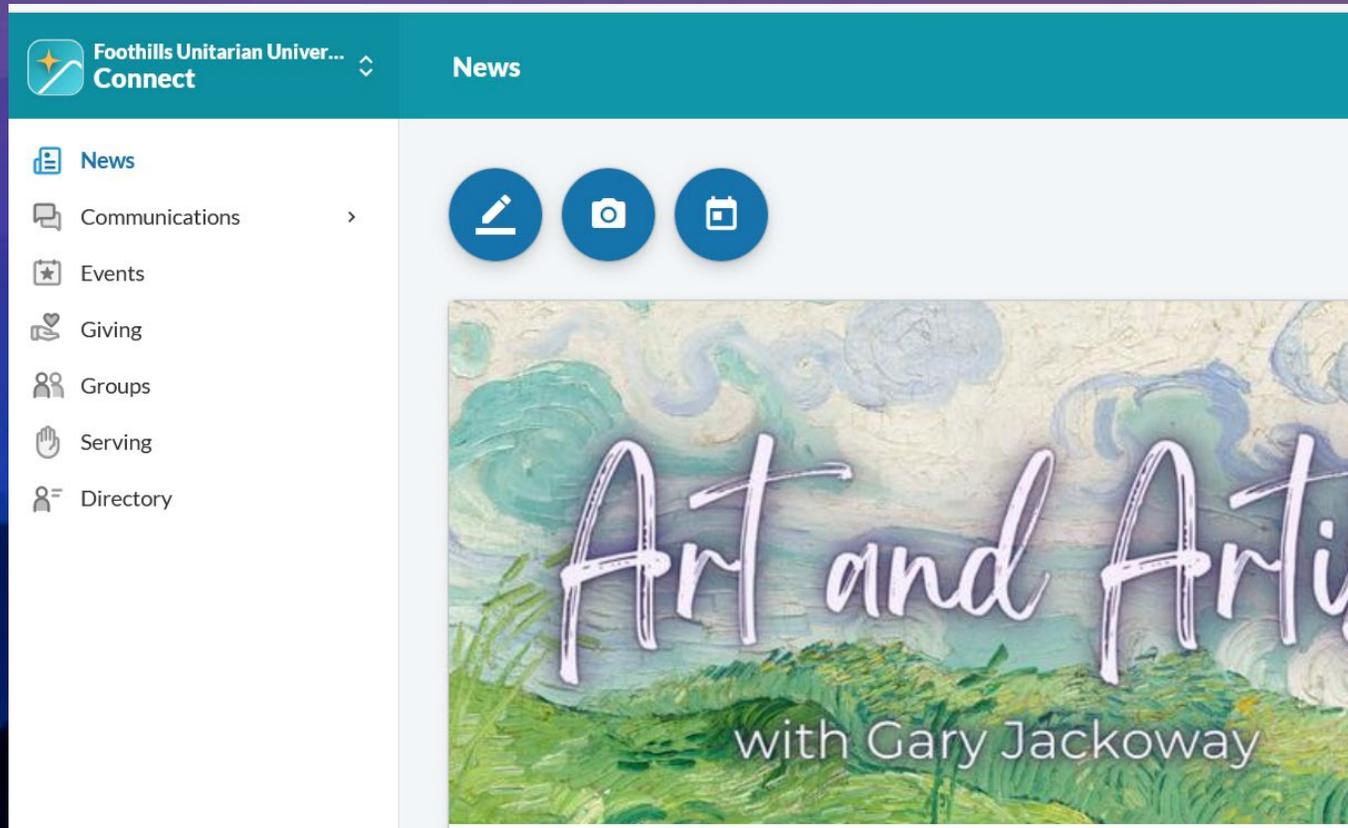
**DON'T KNOW:** Proceed to the next page to find out



# Update an Existing Donation – Path 1-Step 1

On your computer open realm in a web browser

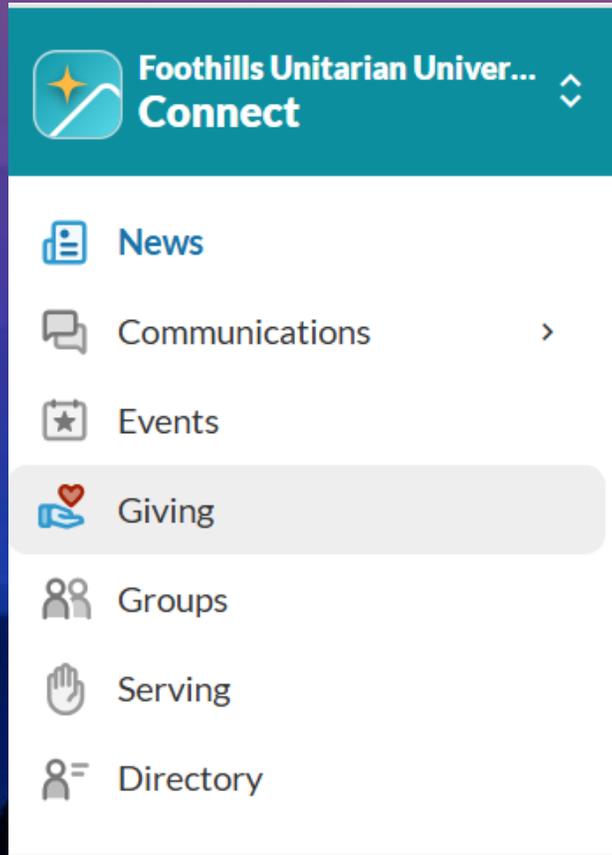
<https://onrealm.org>





# Update an Existing Donation – Path 1-Step 2

Click on “Giving” from the menu on the left side of the screen





# Update an Existing Donation – Path 1-Step 3



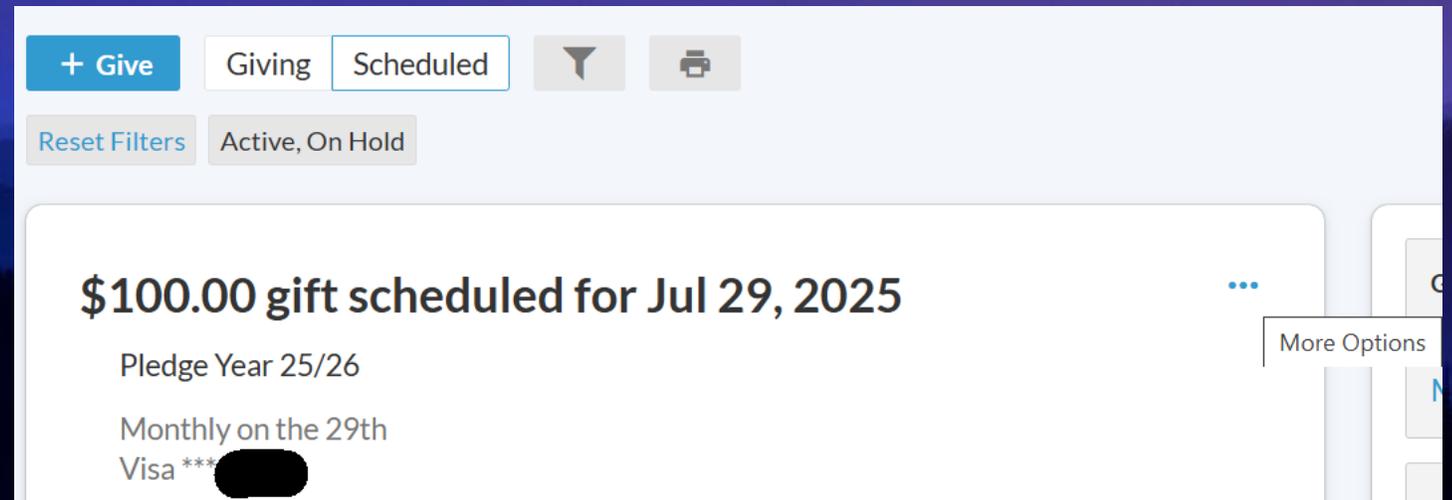
Click on the “**Scheduled**” button to find your active automated donation

**YES** - If you have an active donation set up - it is shown here

- If it is not listed confirm your Filters are set to Active , On Hold  
If the filter is listed as something else are not click the “**reset filter**” button  
If it is still not listed you don't have one

**NO** – you do not have an Active donation

- Proceed to [page 22 \(step P2-2.1\)](#) to set up a new automated donation



## Update an Existing Donation – Step P2-1.3



# Update an Existing Donation – Path 1-Step 4

Click on the “3 dots” to the right of the donation to see drop down a menu

A screenshot of a web application interface for managing donations. At the top, there are navigation buttons: "+ Give" (blue), "Giving", and "Scheduled" (highlighted with a blue border). To the right are icons for a funnel and a printer. Below these are "Reset Filters" and "Active, On Hold" buttons. The main content area shows a donation card for a "\$100.00 gift scheduled for Jul 29, 2025". Below the amount, it says "Pledge Year 25/26", "Monthly on the 29th", and "Visa \*\*\*" followed by a black redaction box. To the right of the card is a three-dot menu icon, and a tooltip labeled "More Options" is visible over it.



# Update an Existing Donation – Path 1-Step 5

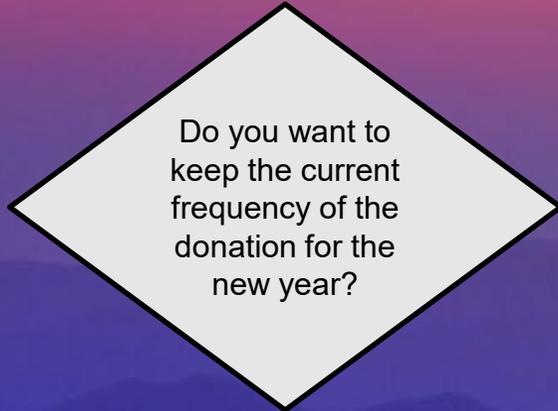
Click “**EDIT**” from the drop down menu

A screenshot of a web application interface for managing donations. At the top, there are navigation buttons: "+ Give" (blue), "Giving", and "Scheduled" (highlighted with a blue border). To the right are icons for a dropdown menu and a printer. Below these are "Reset Filters" and "Active, On Hold" buttons. The main content area shows a donation card for a "\$100.00 gift scheduled for Jul 29, 2025". Below the amount, it says "Pledge Year 25/26", "Monthly on the 29th", and "Visa \*\*\*" followed by a black redaction box. A dropdown menu is open to the right of the card, listing three options: "Edit Gift", "Issue Refund", and "Void".



# Update an Existing Donation – Path 1-Step 5

## DECISION



**NO:** Proceed to the next page to end your existing donation – **Path 2-Step 6a**

**YES:** Proceed to Page 22 – **Path2-Step.6b – Update an Existing Donation**

How much would you like to give?

Amount  Fund

[+ Another Fund](#)

Start date

**i** This will not complete your pledge to Pledge Year 25/26 within 07/29/2025 - 06/30/2026

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SUMMARY **\$100.00**  
every month



# Update an Existing Donation – Path 1-Step 6a

Check the end date for your current donation

If it does not have an end date or it is set to end after your new donation starts....

- Change the end date to make sure your current donation stops before your new donation starts

Click Continue

Proceed to Page 26 – **Path 2-Step 3** to create your new donation

How much would you like to give?

Amount  Fund

Start date

**i** This will not complete your pledge to Pledge Year 25/26 within 07/29/2025 - 06/30/2026

**\$100.00**  
every month



# Update an Existing Donation – Path 1-Step 6b

Update your selections for your automated donation

- Enter the **new amount** if it has changed
- Set the **date to start** the donation
- Set the **date to end** the donation

How much would you like to give?

Amount  Fund

Start date

**i** This will not complete your pledge to Pledge Year 25/26 within 07/29/2025 - 06/30/2026

**\$100.00**  
every month



# Update an Existing Donation – Path 1-Step 6b

Select the fund for the new pledge year from the pull-down menu

Click “**Continue**”.

Update your payment method if needed

Click “**Save**”

You are finished.  
Congratulations and thank you!



How much would you like to give?

Amount **\$ 100.00**

Fund **Pledge Year 25/26**

- Share The Plate
- Minister's Discretionary Fund
- Special Events
- Pledge Year 24/25
- Pledge Year 25/26**
- Fifth Sunday

GIVE ONCE

EVERY WEEK EVERY 2 WEEKS

Start date **Today**

**i** This will not complete your pledge to Pledge Year 25/26 within 07/29/2025 - 06/30/2026

SUMMARY **\$100.00**  
every month

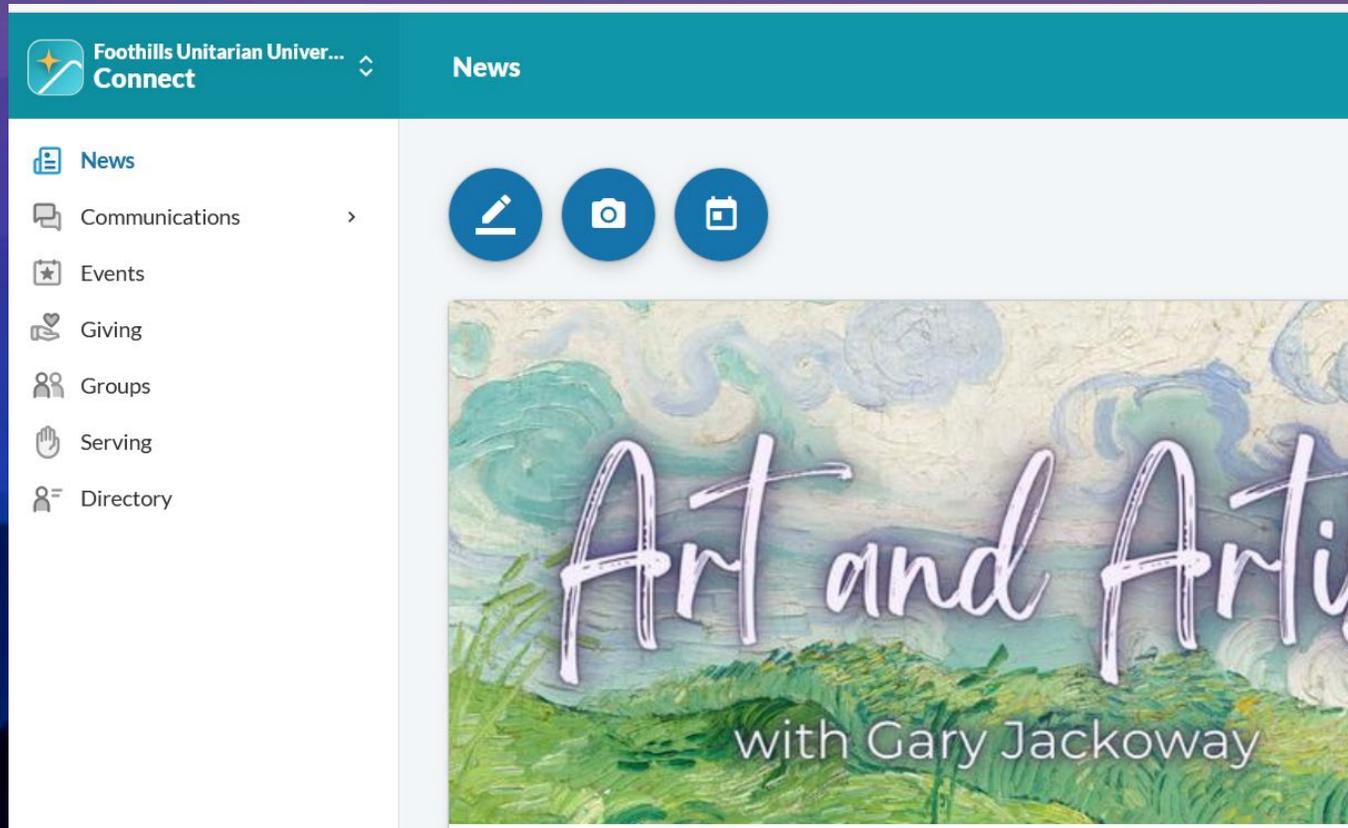
Cancel **Continue**



# Create a New Donation – Path 2-Step 1

On your computer open realm in a web browser

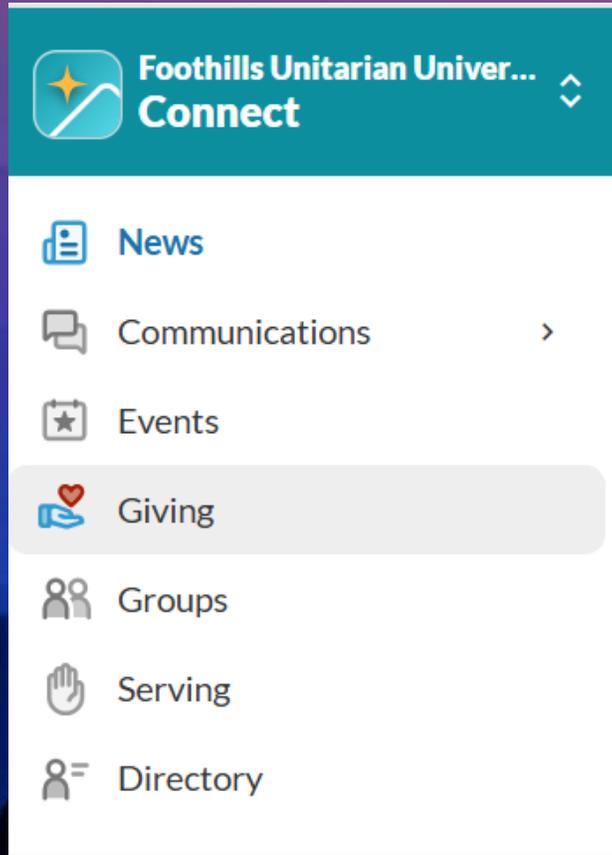
<https://onrealm.org>





# Create a New Donation – Path 2-Step 2

Click on “Giving” from the menu on the left side of the screen





# Create a New Donation – Path 2-Step 3

Click on the “+Give” button

The screenshot shows a web interface for managing donations. At the top, there are navigation tabs: '+ Give' (highlighted in blue), 'Giving', and 'Scheduled'. Below these are filter options: 'Reset Filters' and 'Active, On Hold'. The main content area features a large illustration of two hands holding a heart, surrounded by plus signs, a gift icon, and a camera icon. Below the illustration, the text reads: 'There are no recurring gifts to display. Whenever a gift is scheduled, you will see a summary of its recurrences here.' A 'Learn more' link is positioned below this text. On the right side, there is a sidebar with two sections: 'GIVING INFORMATION' containing a 'Manage Payment Methods' link, and 'CURRENT PLEDGES' with a dropdown arrow. Under 'CURRENT PLEDGES', it shows 'Pledge Year 25/26' for 'Jul 29, 2025 - Jun 30, 2026' with a frequency of '\$100.00/every month'. A progress bar shows '0%'. Below the bar is a table with the following data:

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



# Create a New Donation – Path 2-Step 4

## Create your donation

- Enter the amount you pledged
- Select the fund for the pledge year from **the pull-down menu**
- Set the **frequency** of your donation
- Set the **date to start** the donation
- Set the **date to end** the donation

Click **“Continue”**

How much would you like to give?

Amount  Fund

Start date

**i** This will complete your pledge to Pledge Year 25/26 within 07/29/2025 - 06/30/2026

SUMMARY **\$100.00**  
every month



# Create a New Donation – Path 2-Step 5

Enter your payment information

Click “Give”

You are finished.

Congratulations and thank you!



How would you like to give, Kim?

CREDIT OR DEBIT  BANK ACCOUNT

Account Number

Name On Card  
Test-PC Stephenson

Expiration Month  Expiration Year  CVV

Billing Address 1  Billing Address 2

Billing City  Billing State  Billing Postal Code

Contribute an extra \$2.50 per gift to help offset processing costs.

SUMMARY **\$100.00**  
every month