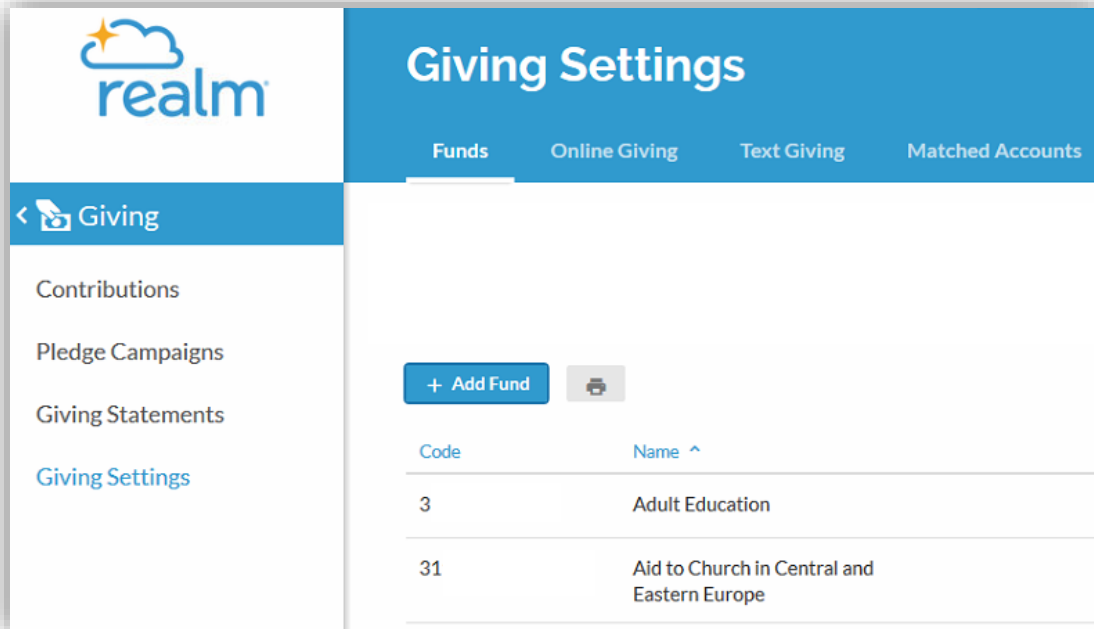
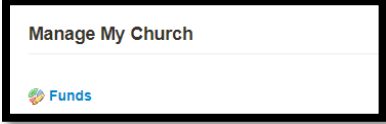

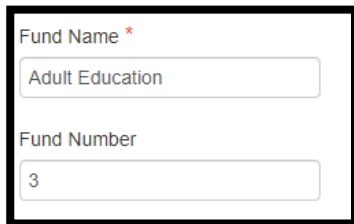


To make sure that your REALM program matches up with your Online Giving, the following items need to be entered into the Online Giving System:

1. To connect the donor, you will need to have their **Envelope#** from Realm entered into their env # within online giving.
2. To connect the funds, you will need to have the **Fund Code** from Realm entered into the fund number field within online giving. To get this number do the following:
  - a. Log into Realm
  - b. Click Giving
  - c. Click Giving Settings
  - d. Click Funds
  - e. This screen will show you a list of the funds and their subsequent codes




- f. Once you have the Fund Code from **Realm**, log into Online Giving and enter the code into the Fund Number field.
- g. From the Manage My Church page, select Funds 
- h. Select the Fund you are updating from the fund list.
- i. Update the Fund Number field with the Fund Code from **Realm**. Then click . Do this for all the funds you wish to import into Realm.




Fund Name \*

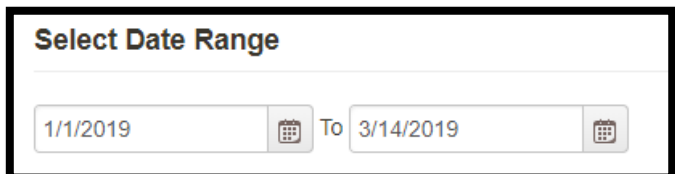
Fund Number

## To Export from Online Giving:



1. Log into your Online Giving Administrator account
2. Click Export Contributions 

3. Select the fund(s) you wish to export (TIP: you can select one fund, multiple funds or by clicking the Select All Funds link you can select them all). 

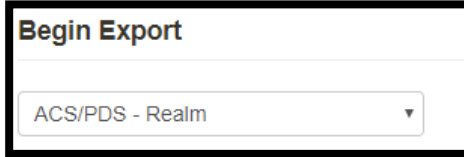
4. Select the date range you'd like to export. (We recommend that you not include today's date on the export.)



Select Date Range


 To  

5. Select ACS/PDS Realm as the export type.



**Begin Export**


ACS/PDS - Realm

6. Only export contributions/pledges not yet exported
  - a. When this box is checked, the system will not pull any donations that you have previously exported. It will be checked by default.
7. Include quick gifts
  - a. If this is checked, donors that used quick give will be included in the export. If it is not checked, they will not be included. It will be checked by default.
8. Click Export button 
9. Save File – You will need to save the file that is exported in a location that you will be able to get to when you are in Realm. (TIP: typically this file is saved to the downloads folder on your computer unless you've changed where downloaded files go).

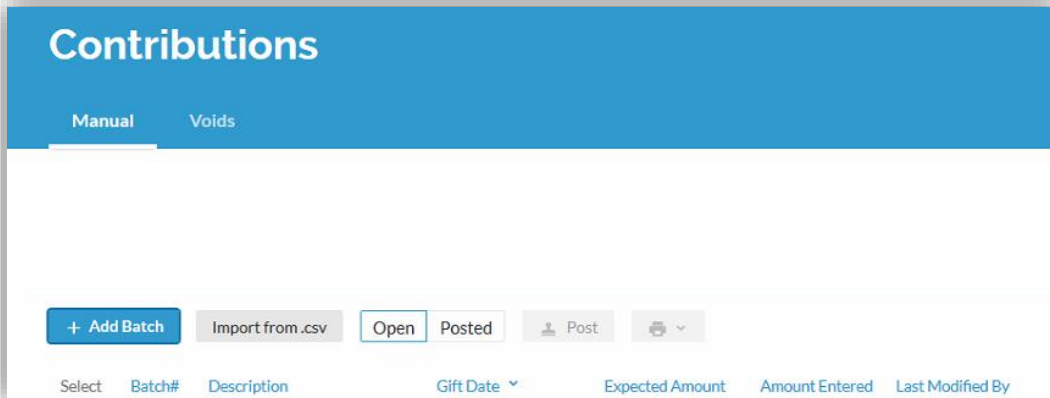
### Importing into Realm:

1. Open Realm website and login

2. Click Contributions Button



3. Click Import from .csv



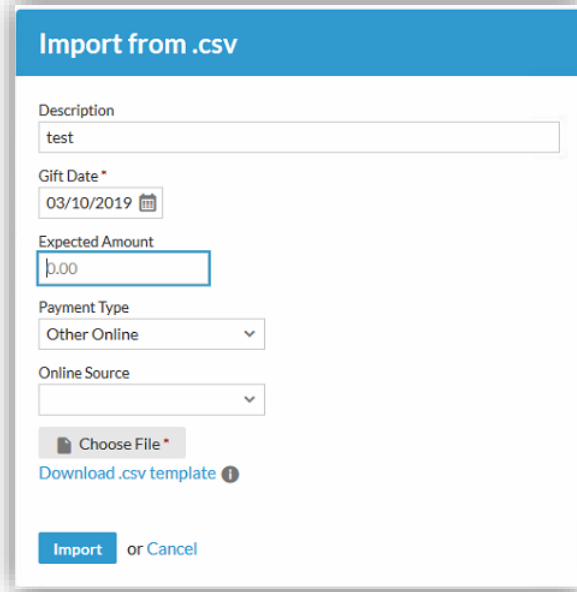
**Contributions**

Manual Voids

+ Add Batch Import from .csv Open Posted Post

Select Batch# Description Gift Date Expected Amount Amount Entered Last Modified By


4. In the Import from .csv box, complete the requested information and select Choose File



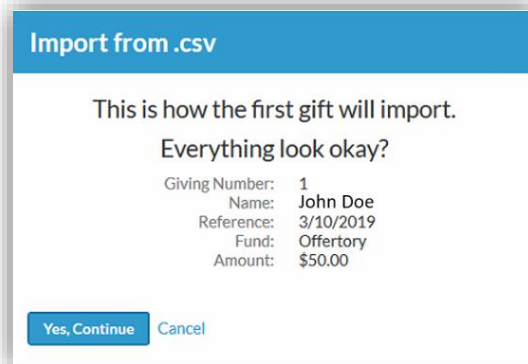
The screenshot shows a form titled "Import from .csv" with the following fields and options:

- Description: test
- Gift Date: 03/10/2019
- Expected Amount: 0.00
- Payment Type: Other Online
- Online Source: (empty dropdown)
- Buttons: Choose File, Download .csv template, Import, or Cancel

5. Navigate to the location of the file you saved from online giving, select it and click open

6. Once the file has been selected, click Import 

7. You will get a sample of how the gifts will import based off the first gift. If this looks correct, click Yes, Continue.



The screenshot shows a confirmation dialog titled "Import from .csv" with the following text:

This is how the first gift will import.  
Everything look okay?

Giving Number:	1
Name:	John Doe
Reference:	3/10/2019
Fund:	Offertory
Amount:	\$50.00

Buttons: Yes, Continue, Cancel

8. Locate the batch in Open Batches and select it by checking the box on the left side of that batch, then click POST.

You have now successfully imported donations into Realm, if you have any questions or need assistance please call Technical Support at 1-800-348-2886.