

This document provides step-by-step instructions to generate giving reports from the Good Shepherd online giving platform, Realm. In the event you have any questions during this process, please contact Dawn Gordon, Parish Administrator, at dawn@cogsdunedin.com or 727-733-4125.

1. Go to the Good Shepherd home page at <https://www.cogsdunedin.com>

press **Realm** and then press **LOG INTO REALM**

Optionally, go directly to the following link

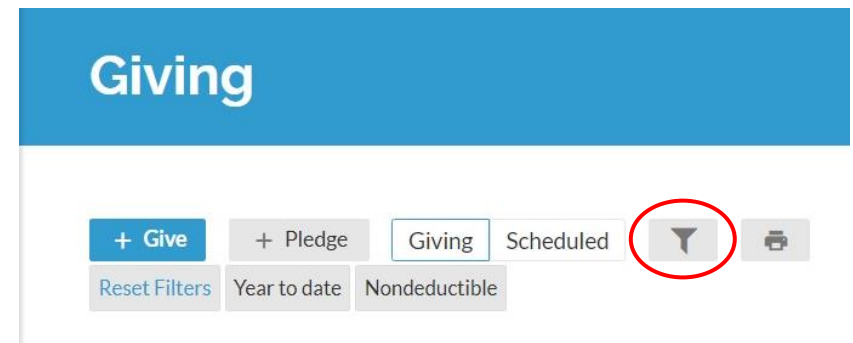
<https://onrealm.org/churchgoodshepherd>

2. The link will bring you to the **Sign In** page. Enter your e-mail address and password. Press **Sign In**

3. At the Home page, from the options in the left column, press **"Giving"**



4. Press the filter icon

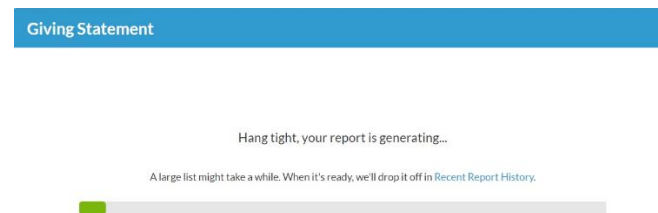


5. Various filtering options appear. You can keep the defaults. However, below are a few options that you may choose to change.
 - A. "Gift Date Range" provides a list of typical periods of time for the report. "Year to Date" is the default, reporting on the current calendar year. Another useful option is "Last Year", which selects data from the last calendar year – useful for tax reporting purposes.
 - B. "Fund" allows you to limit the report to specific funds. The default, "Select Funds..." reports on all donations.

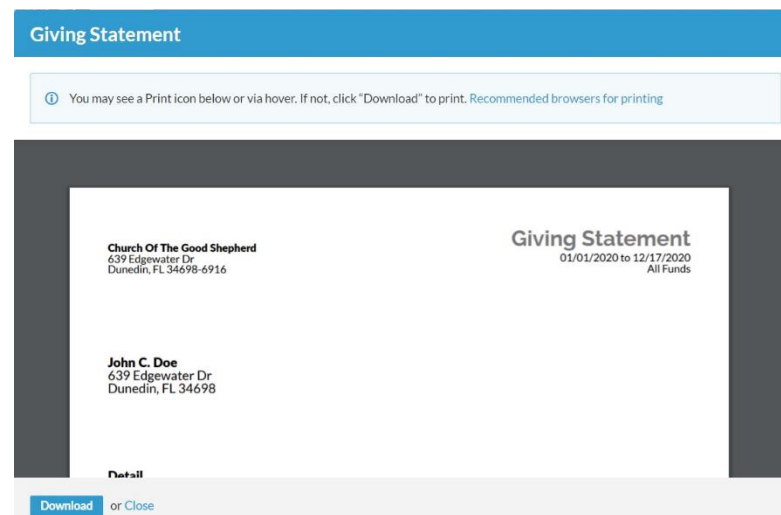
The screenshot shows the 'Giving' interface with a blue header. Below the header are buttons for '+ Give', '+ Pledge', 'Giving', and 'Scheduled'. To the right of these buttons are a funnel icon and a printer icon, which is circled in red. Below the buttons are two dropdown menus: 'Gift Date Range' with 'Year to Date' selected (marked with a red 'A') and 'Fund' with 'Select funds...' selected (marked with a red 'B'). Below these are date pickers for '01/01/2020' and '12/17/2020', a 'Campaign' dropdown, and a 'Nondeductible' checkbox which is checked. At the bottom are 'Filter' and 'Clear Filters' buttons.



6. Press the printer icon 

7. The system will select the data to generate the report...



When complete, the report will be displayed.



8. View the report by scrolling up or down. Press  at the bottom of the window to transfer the report to your computer to save or print, or  to return to generate a different report.