

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 the Parish Administrator at info@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**

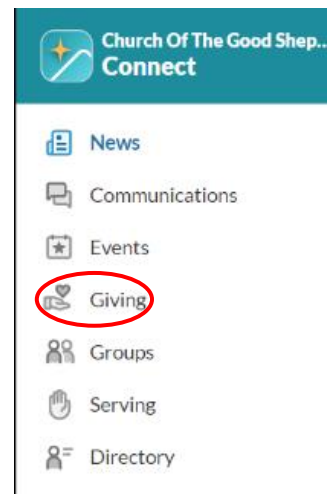
Optionally, go directly to the following link

<https://onrealm.org/churchgoodshepherd>

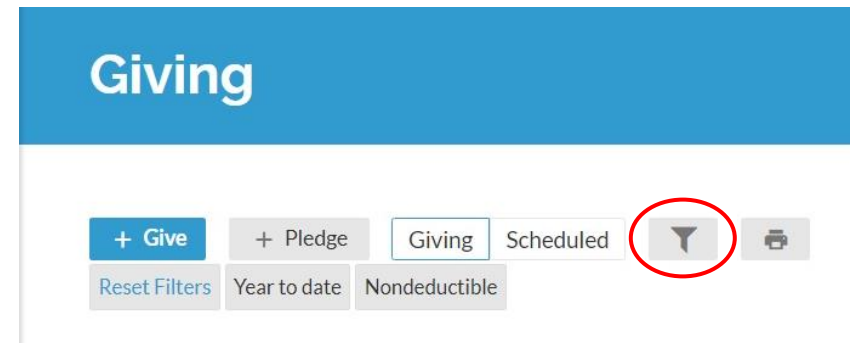
2. The link takes you to the start page for Realm. Press **Sign In**.

3. Next is the **Sign In** page. Enter your e-mail address and password. Press **Sign In**

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




5. Press the filter icon



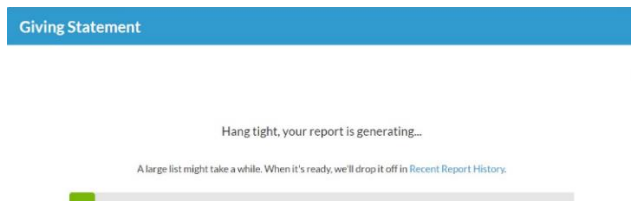
6. Various filtering options appear. You can keep the defaults. However, below are a few options that you may choose to change.

- 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 to which you have donated. The default, "Select funds..." reports on all funds.
- C. "Campaign" allows you to limit the report to specific stewardship campaigns to which you have pledged/donated. The default, "Select campaigns..." reports on all stewardship campaigns.

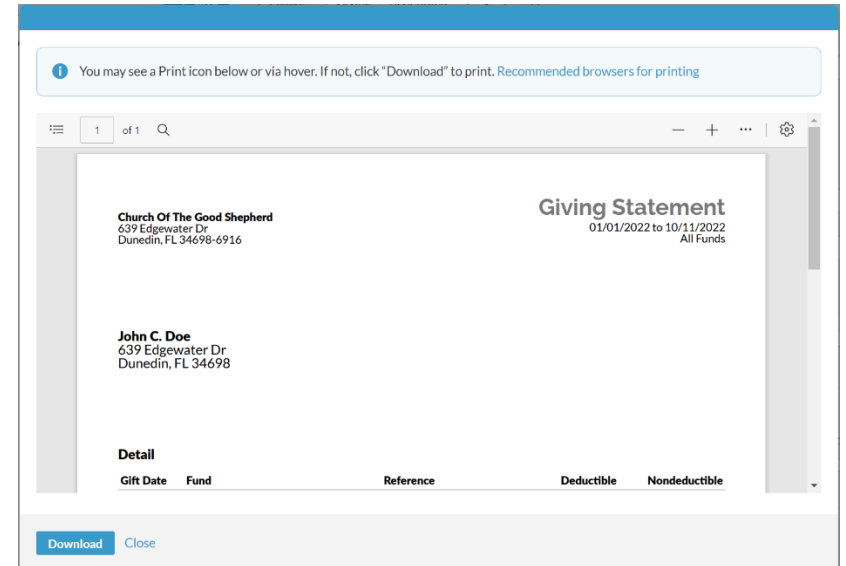
The screenshot shows the 'Giving' interface with a search bar at the top. Below the search bar are buttons for '+ Give', '+ Pledge', 'Giving', and 'Scheduled'. A funnel icon and a printer icon are also visible, with the printer icon circled in red. Below these are filter sections: 'Gift Date Range' with 'Year to Date' selected and dates '01/01/2022' and '10/11/2022'; 'Nondeductible' with 'Included' checked; 'Fund' with 'Select funds...'; and 'Campaign' with 'Select campaigns...'. At the bottom are 'Filter' and 'Clear Filters' buttons.



7. The filtered giving history will be displayed on the screen. If you should like a downloadable copy, press the printer icon 

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



When complete, the report will be displayed.



9. 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.