

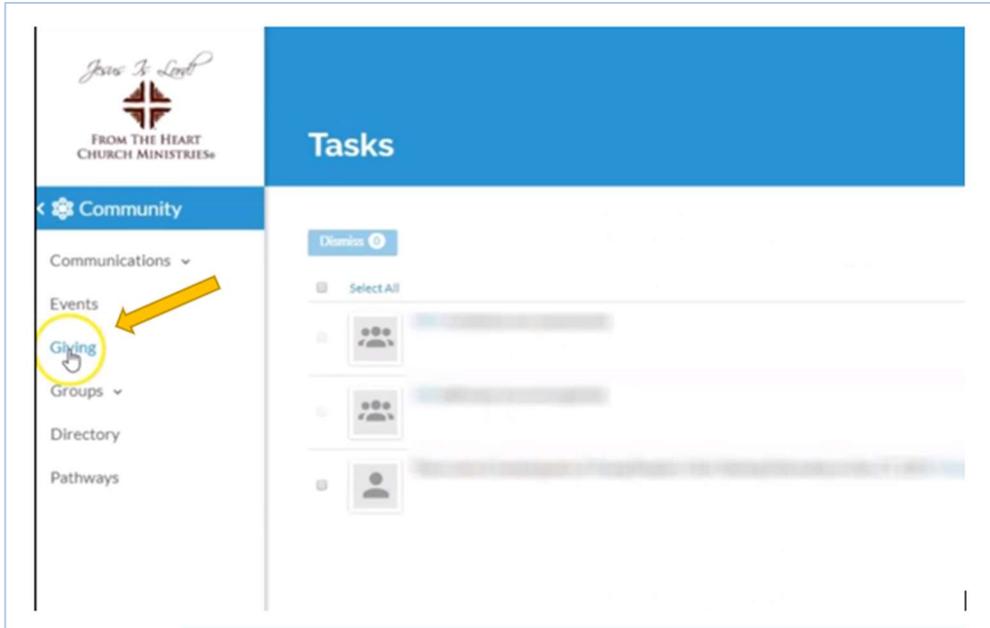


## REALM Giving Statement - SOP

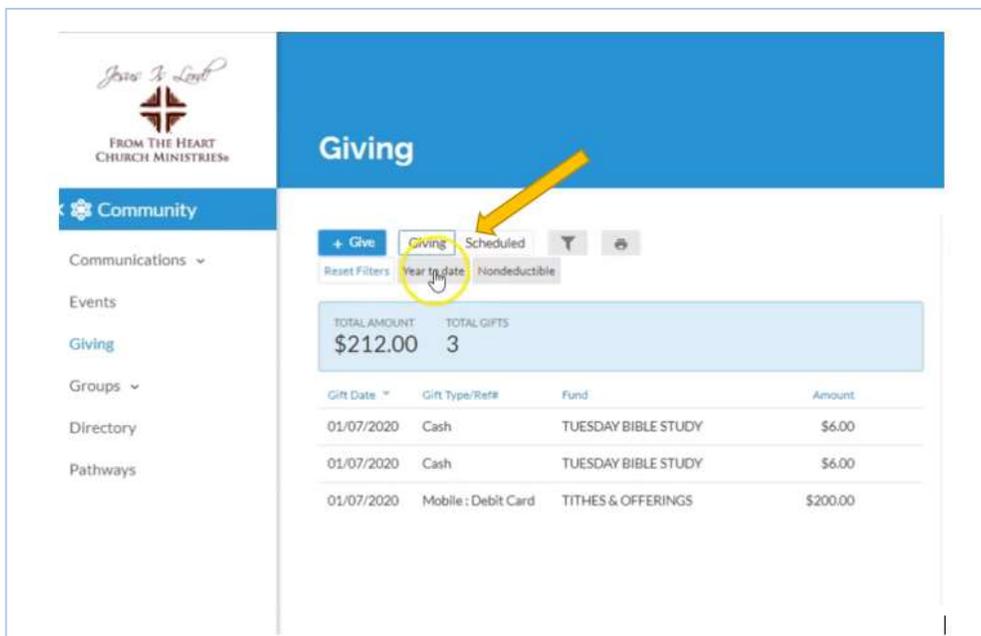
**Notice:** While logged in to Realm, it is recommended to perform the following steps on a desktop computer and NOT a mobile device or tablet.

### Steps:

1. Click on "Giving."



2. Click on "Year to date."





## REALM Giving Statement - SOP

- Click on the drop down menu.

The screenshot shows the REALM Giving Statement interface. The left sidebar contains navigation options: Community, Communications, Events, Giving, Groups, Directory, and Pathways. The main content area is titled 'Giving' and includes a '+ Give' button, 'Giving' and 'Scheduled' tabs, and a funnel icon. The 'Gift Date Range' dropdown menu is open, showing 'Year to Date' selected. A yellow circle highlights the dropdown arrow, and a yellow arrow points to it from the right. Below the dropdown, there are date pickers for '01/01/2020' and '01/09/2020', a 'Nondeductible' checkbox, and a 'Filter' button. A summary box shows 'TOTAL AMOUNT \$212.00' and 'TOTAL GIFTS 3'. A table below lists the gifts:

Gift Date	Gift Type/Ref#	Fund	Amount
01/07/2020	Cash	TUESDAY BIBLE STUDY	\$6.00
01/07/2020	Cash	TUESDAY BIBLE STUDY	\$6.00
01/07/2020	Mobile : Debit Card	TITHES & OFFERINGS	\$200.00

- And select "Last Year".

The screenshot shows the REALM Giving Statement interface with the 'Gift Date Range' dropdown menu open. The 'Last Year' option is selected and highlighted with a yellow circle. A yellow arrow points to the 'Last Year' option from the right. The rest of the interface is the same as in the previous screenshot.



## REALM Giving Statement - SOP

5. Click on "Filter".

The screenshot shows the REALM Giving Statement interface. The left sidebar contains navigation options: Community, Communications, Events, Giving, Groups, Directory, and Pathways. The main content area is titled 'Giving' and includes a 'Give' button, a 'Giving' tab, and a 'Scheduled' tab. Below these are filters for 'Gift Date Range' (Last Year), 'Fund' (Select funds...), and 'Nondeductible' (Included). A yellow circle highlights the 'Filter' button, with a yellow arrow pointing to it. Below the filters, a summary box shows 'TOTAL AMOUNT \$212.00' and 'TOTAL GIFTS 3'. A table below lists the gifts:

Gift Date	Gift Type/Ref#	Fund	Amount
01/07/2020	Cash	TUESDAY BIBLE STUDY	\$6.00
01/07/2020	Cash	TUESDAY BIBLE STUDY	\$6.00
01/07/2020	Mobile : Debit Card	TITHES & OFFERINGS	\$200.00

6. Click on the print icon.

The screenshot shows the REALM Giving Statement interface. The left sidebar contains navigation options: Community, Communications, Events, Giving, Groups, Directory, and Pathways. The main content area is titled 'Giving' and includes a 'Give' button, a 'Giving' tab, and a 'Scheduled' tab. Below these are filters for 'Reset Filters', 'Last year', and 'Nondeductible'. A yellow circle highlights the print icon, with a yellow arrow pointing to it. Below the filters, a summary box shows 'TOTAL AMOUNT \$6,800.50' and 'TOTAL GIFTS 57'. A table below lists the gifts:

Gift Date	Gift Type/Ref#	Fund	Amount
12/31/2019	Mobile : Debit Card	TITHES & OFFERINGS	\$200.00
12/24/2019	Mobile : Debit Card	TITHES & OFFERINGS	\$200.00
12/17/2019	Online : Debit Card	TITHES & OFFERINGS	\$200.00
12/10/2019	Online : Card	TITHES & OFFERINGS	\$200.00
12/03/2019	Online : Visa ***3597	TITHES & OFFERINGS	\$200.00
11/26/2019	Online : Visa ***3597	TITHES & OFFERINGS	\$200.00



## REALM Giving Statement - SOP

7. Click on "Print".

The screenshot shows the REALM Giving Statement interface. A modal dialog box titled "Print Giving Statement" is open, featuring a text input field for a comment, a character count of "300 characters", and "Print" and "Cancel" buttons. A yellow arrow points to the "Print" button. The background interface shows a table of giving transactions with a total of \$6,800.50 and 57 gifts.

Gift Date	Gift Type/Date	Fund
12/31/2019	Mobile : Debit Card	TITHES & OFFERINGS
12/24/2019	Mobile : Debit Card	TITHES & OFFERINGS
12/17/2019	Online : Debit Card	TITHES & OFFERINGS
12/10/2019	Online : Card	TITHES & OFFERINGS
12/03/2019	Online : Visa ****3597	TITHES & OFFERINGS
11/26/2019	Online : Visa ****3597	TITHES & OFFERINGS
11/19/2019	Online : Visa ****3597	TITHES & OFFERINGS
11/10/2019	Online : Visa ****3597	TITHES & OFFERINGS

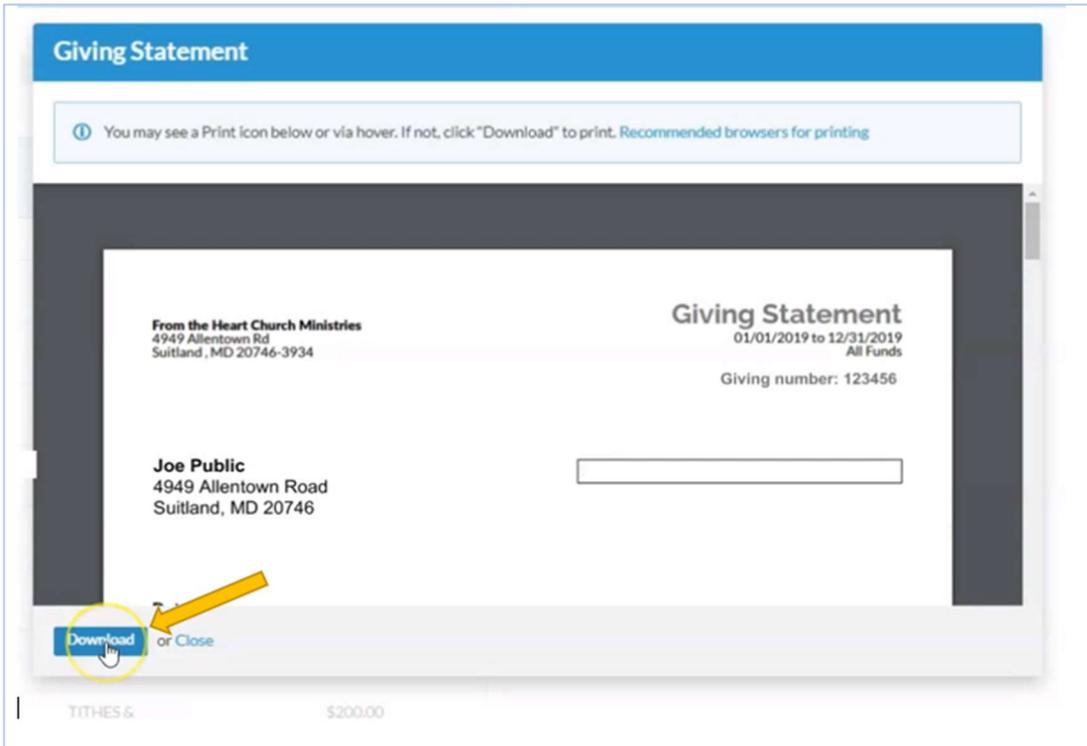
8. The report will begin to generate.

The screenshot shows the REALM Giving Statement interface with a modal dialog box titled "Giving Statement" that is loading. The dialog displays the text "Hang tight, your report is generating..." and "A large list might take a while. When it's ready, we'll drop it off in Recent Report History." A progress bar is visible, and a yellow arrow points to the dialog. The background interface shows the same giving transactions table as in the previous screenshot.



## REALM Giving Statement - SOP

9. Once report has generated, click on "Download."



10. A PDF of the statement will download. Check your download folder for the statement.

