

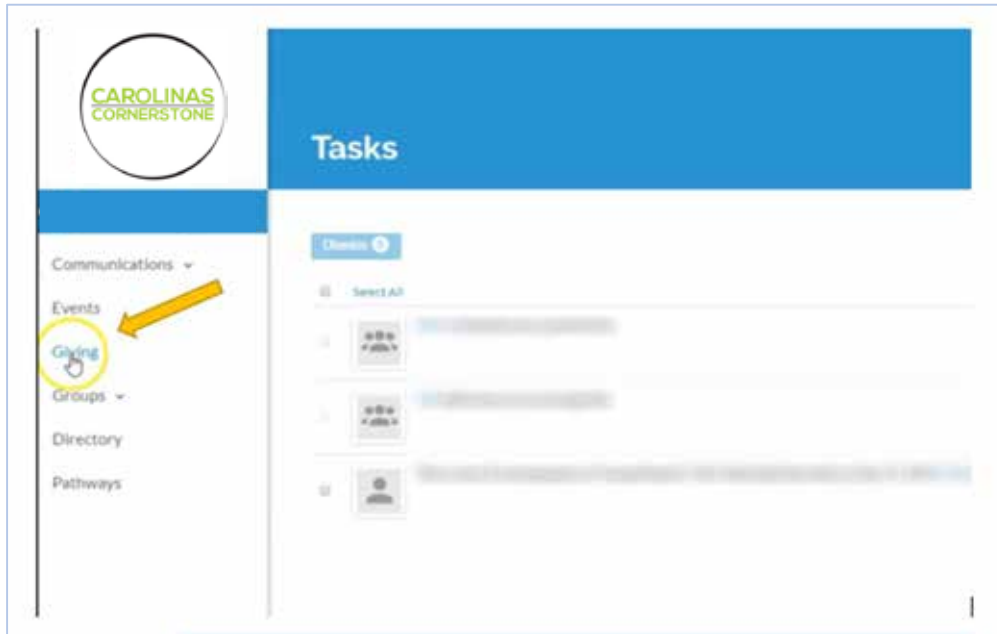


REALM Giving Statement - SOP

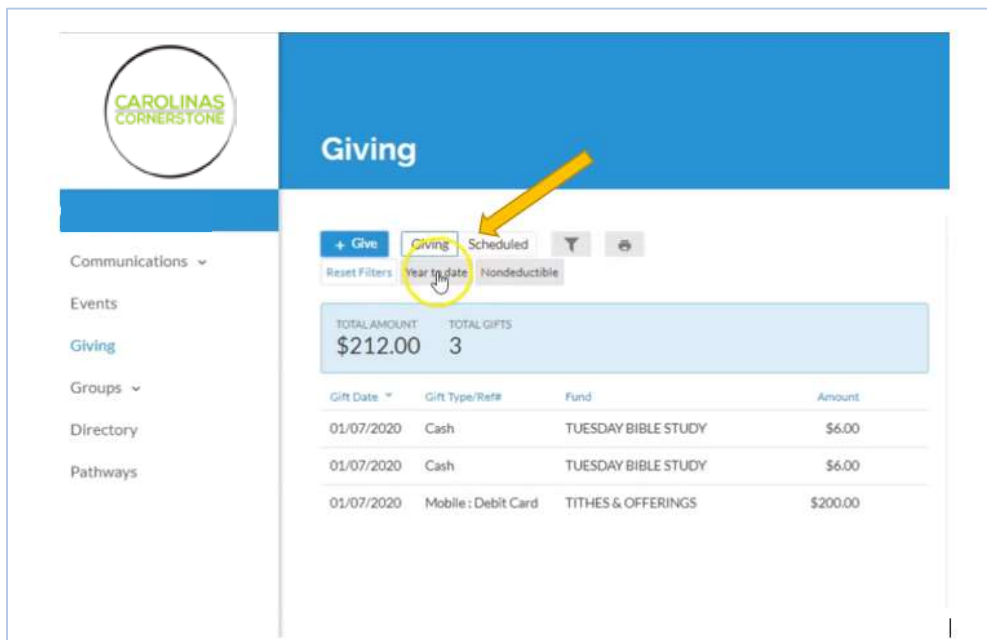
Notice: While logged in to Realm, it is recommended to perform the following steps on a desktop computer and NOT a mobile device or tablet.

Steps:

1. Click on "Giving."



2. Click on "Year to date."





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3. Click on the drop down menu.

The screenshot shows the REALM Giving Statement interface. The left sidebar contains the 'CAROLINAS CORNERSTONE' logo and a navigation menu with items: Communications, Events, Giving, Groups, Directory, and Pathways. The main content area is titled 'Giving' and features a '+ Give' button, 'Giving' and 'Scheduled' tabs, and a search 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 checked, and a 'Filter' button. A summary box shows 'TOTAL AMOUNT \$212.00' and 'TOTAL GIFTS 3'. Below this is a table with columns: Gift Date, Gift Type/Ref#, Fund, and Amount.

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

4. 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 highlighted with a yellow circle, and a yellow arrow points to it from the left. The table below shows the same data as the previous screenshot.

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



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5. Click on "Filter".

The screenshot shows the REALM Giving Statement interface. On the left is a navigation menu with 'CAROLINAS CORNERSTONE' logo and options: Communications, Events, Giving, Groups, Directory, Pathways. The main area is titled 'Giving' and contains a filter section with 'Gift Date Range' (Last Year), 'Fund' (Select funds...), and date pickers (01/01/2019 to 1/31/2019). A 'Filter' button is circled in yellow with an arrow pointing to it. Below the filter section, a summary box shows 'TOTAL AMOUNT \$212.00' and 'TOTAL GIFTS 3'. A table 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 with a different set of filters. The 'Filter' button is no longer highlighted. A print icon (a printer symbol) is circled in yellow with an arrow pointing to it. The summary box shows 'TOTAL AMOUNT \$6,800.50' and 'TOTAL GIFTS 57'. A table 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



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7. Click on "Print".

The screenshot shows the REALM Giving Statement interface. The main header is "Giving" with a sub-header "It is recommended to follow". Below the header, there are filters for "Give", "Giving", and "Revised". The total amount is "\$6,800.50" and the number of records is "57". A table of transactions is visible, including dates, methods (Mobile Debit Card, Debit Card, Online Cash, Online Visa), and titles (TITHES & OFFERINGS). A "Print Giving Statement" dialog box is open, showing a "Comment" field with the placeholder text "Add a comment to the giving statement" and a "Print" button highlighted by a yellow arrow.

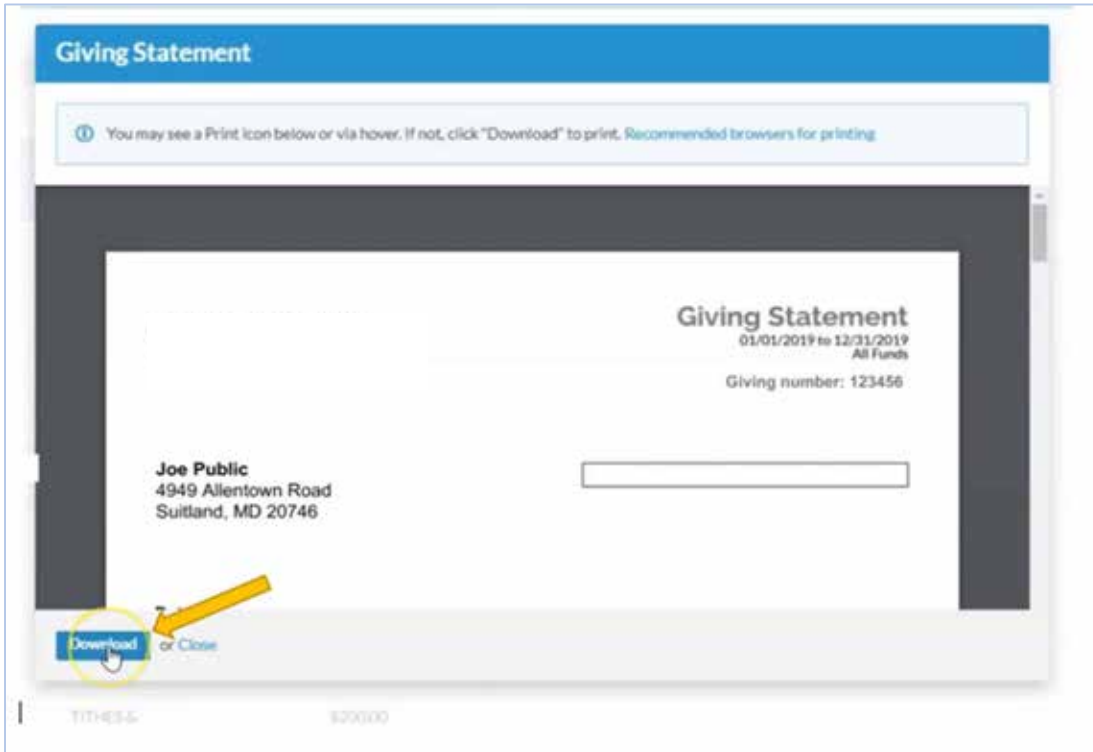
8. The report will begin to generate.

The screenshot shows the REALM Giving Statement interface. The main header is "Giving" with a sub-header "It is recommended to follow the steps while logg". Below the header, there are filters for "Give", "Giving", and "Revised". The total amount is "\$6,800.50" and the number of records is "57". A table of transactions is visible, including dates, methods (Mobile Debit Card, Debit Card, Online Cash, Online Visa), and titles (TITHES & OFFERINGS). A "Giving Statement" dialog box is open, showing a progress bar and the text "Hang tight, your report is generating..". A yellow arrow points to the progress bar. Below the progress bar, there is a "Download" button highlighted by a yellow arrow.



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



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

