How do I report on total contribution amounts per donor for a set date range?

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Donor Management System

Want to learn more about this feature?

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The DMS has standard and customizable reporting features to segment your searches for Contributions, Contacts, and Opportunities.

This article will cover how you can view total contribution amounts for each of your donors within a certain date range or segment your Top Donors within a certain date range (i.e. donors who donated a minimum specific amount) by generating a ***Repeat Contributions Report.*** This is a great way to track the frequency of your donors' donation histories in order to make data-driven decisions and send targeted email marketing campaigns via Bulk Email to help manage those relationships.

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Considerations

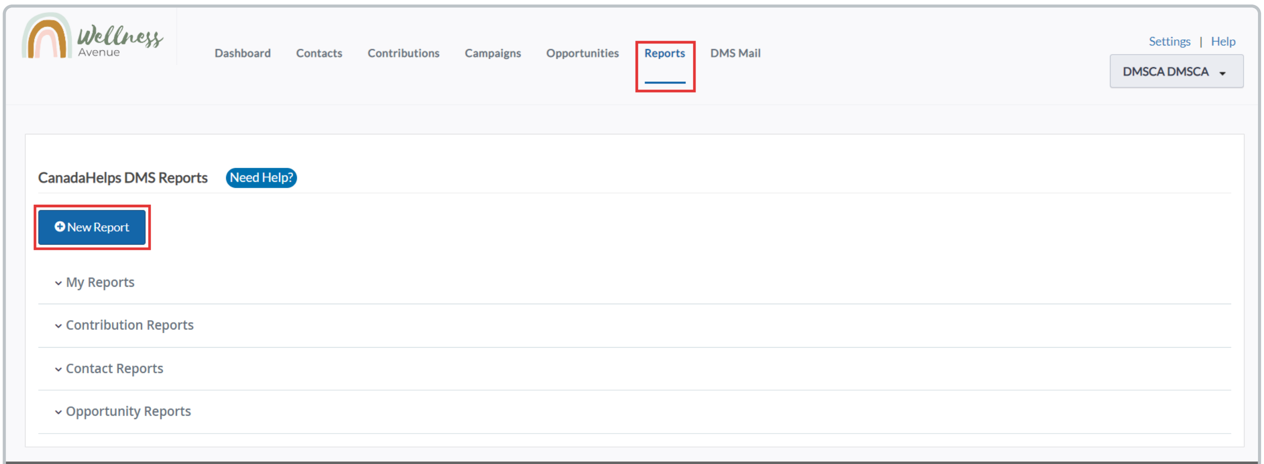
As with all Reports, the columns and filters for this report can be customized.

- The purpose of a **column** is to display additional data in your custom Report, allowing you to see data that otherwise wouldn't have been available in your default Contacts or Contributions tabs.
- The purpose of a **filter** is to narrow down results.
- A fantastic use for this report would be to add those donors to an existing **Group** for a Bulk Email.

Reporting on total contribution amounts per donor for a set date range

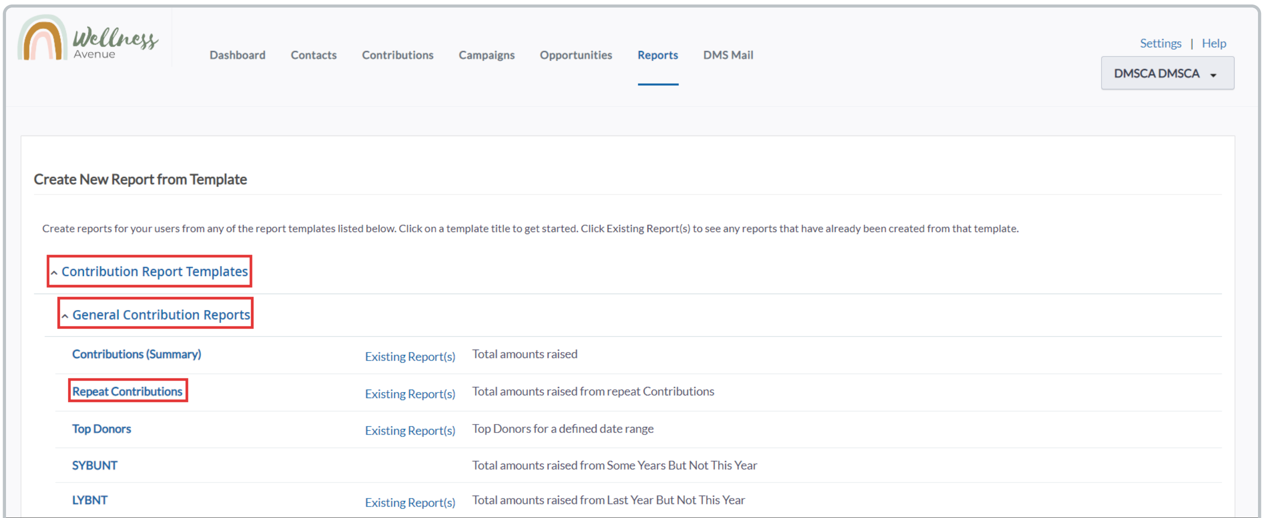
1. Visit your ***Reports Tab***

2. Select ***New Report***



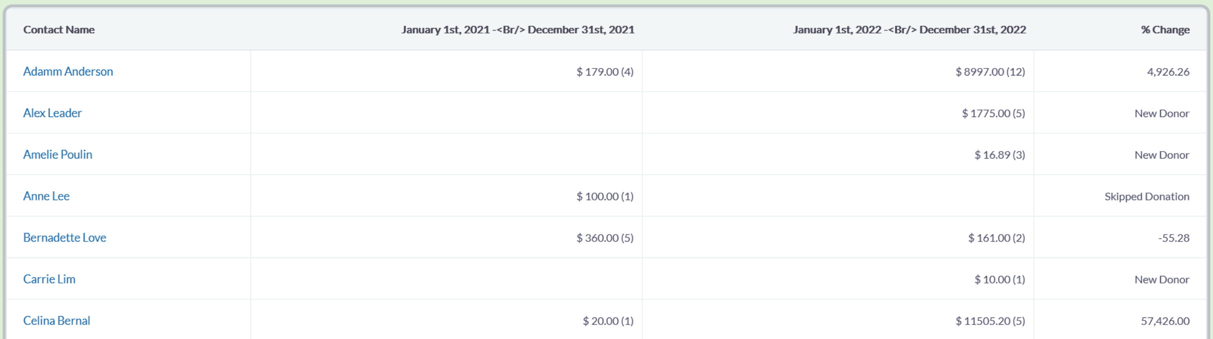
New Report

4. Expand the **Contribution Report Templates** to view the expanded list of Report options. Then, under **General Contribution Reports,** select the ***Repeat Contributions Template***



Repeat Contributions Template

Important: *The default settings in the* ***Repeat Contributions*** *template pulls in all donors from the previous calendar year and the current calendar year. To view this report without customizing further, simply select the* ***blue View Results*** *button within the Report.*



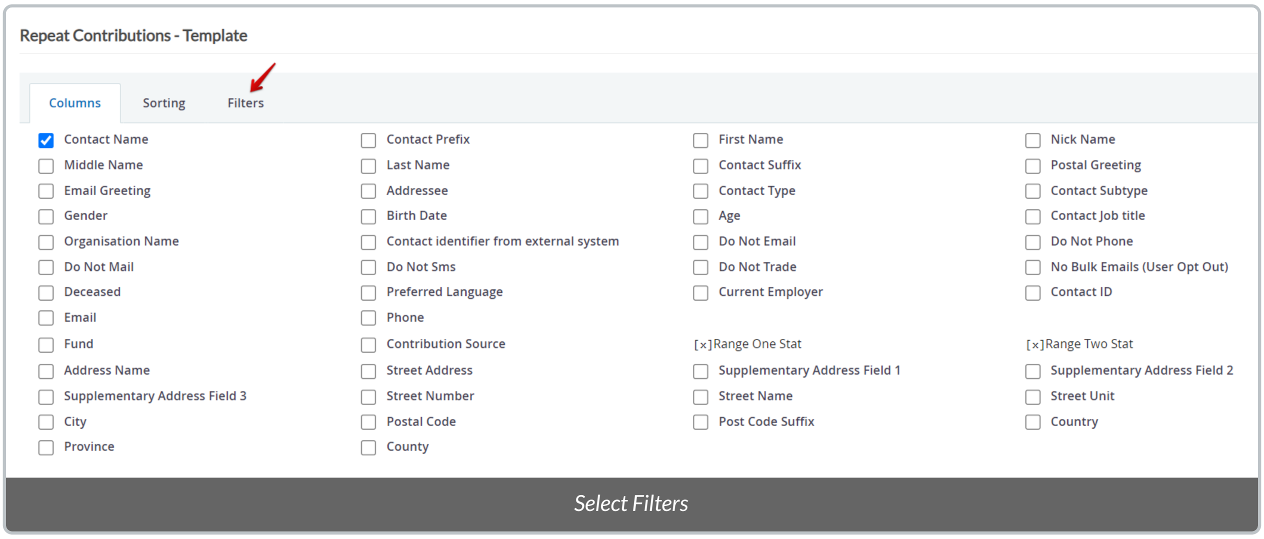
Contact Name	January 1st, 2021 - December 31st, 2021	January 1st, 2022 - December 31st, 2022	% Change
Adamm Anderson	$ 179.00 (4)	$ 8997.00 (12)	4,926.26
Alex Leader		$ 1775.00 (5)	New Donor
Amelie Poulin		$ 16.89 (3)	New Donor
Anne Lee	$ 100.00 (1)		Skipped Donation
Bernadette Love	$ 360.00 (5)	$ 161.00 (2)	-55.28
Carrie Lim		$ 10.00 (1)	New Donor
Celina Bernal	$ 20.00 (1)	$ 11505.20 (5)	57,426.00

Repeat Contributions Report with no additional customization

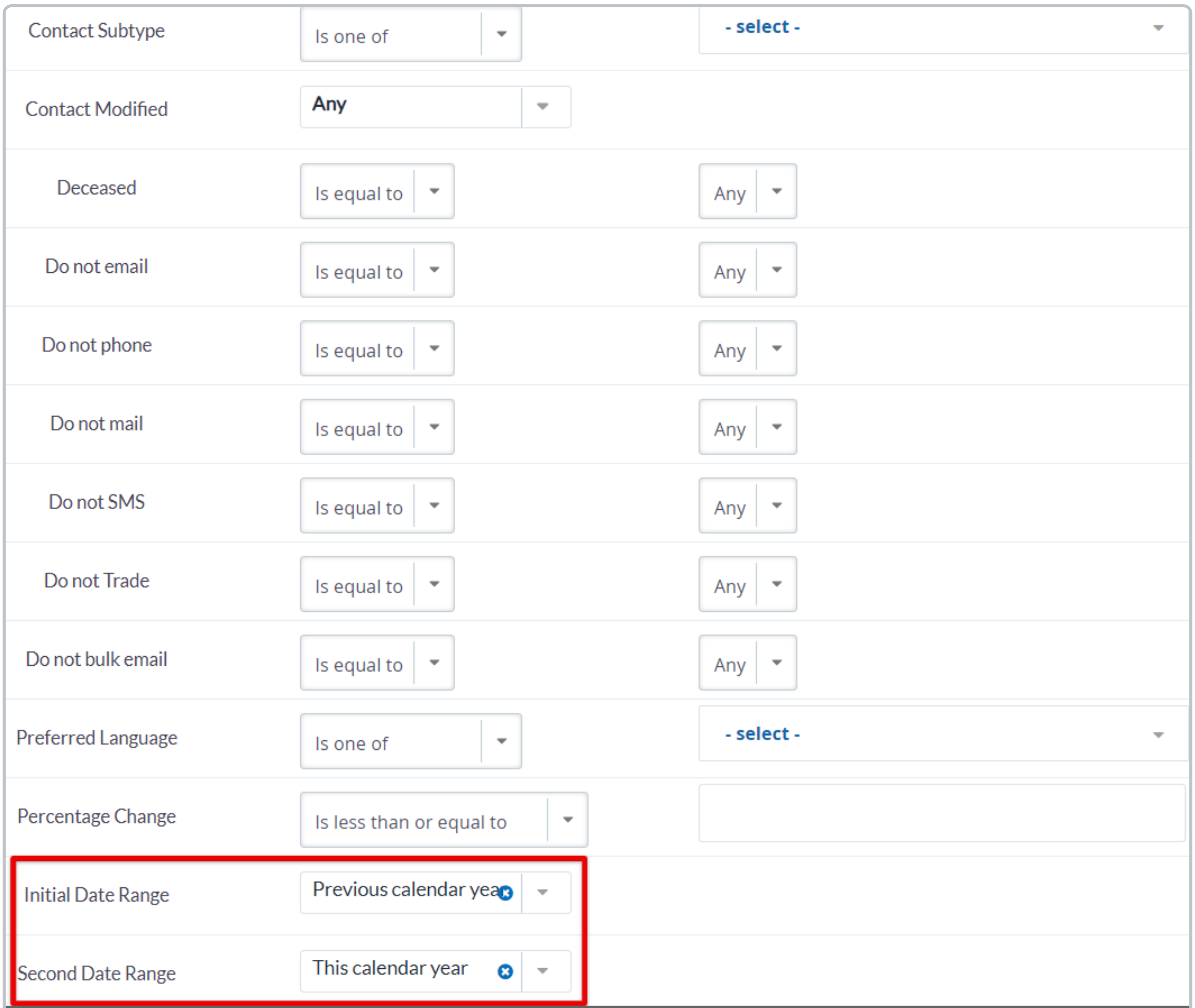
8. You can now customize your Report with:

- Columns
- Sorting
- Filters

In the example below, we will be generating a ***Report on donors who have contributed over $1500 in the previous calendar year.*** First, select **Filters** and scroll down



9. To see your Last Calendar Year's contributions, scroll down and set any 2 date ranges to compare in the**Initial Date Range** and **Second Date Range** drop-down menu.

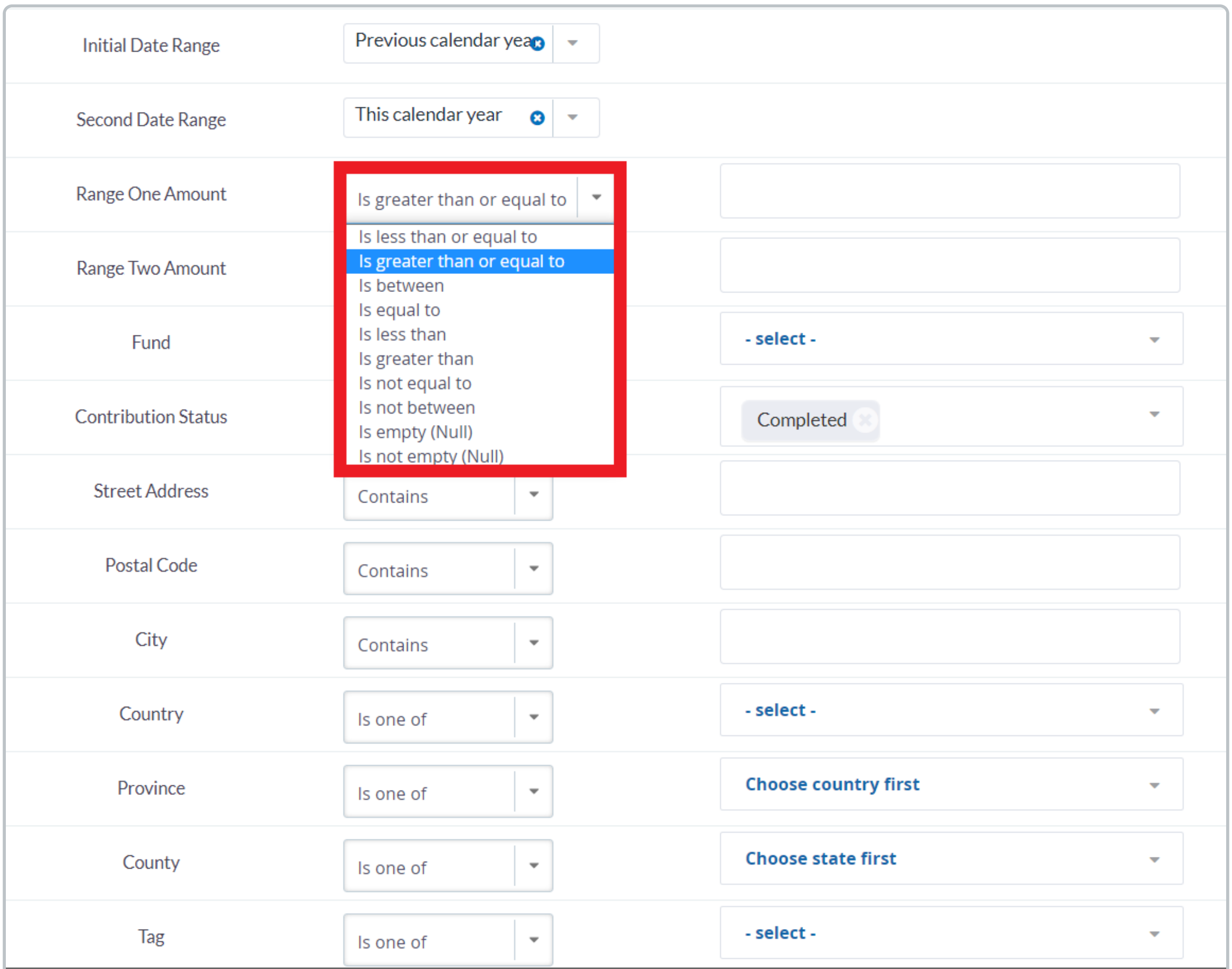


Select Previous calendar year and This calendar year from the drop-down menu

Important: *The default settings in the* ***Repeat Contributions*** *template pulls in all donors from the previous calendar year and the current calendar year. To view this report without customizing further, simply select the* ***blue View Results*** *button within the Report.*

10. To generate a ***Report on donors who have contributed over $1500 in the previous calendar year***, we must also apply a filter in the **Range One Amount** field.

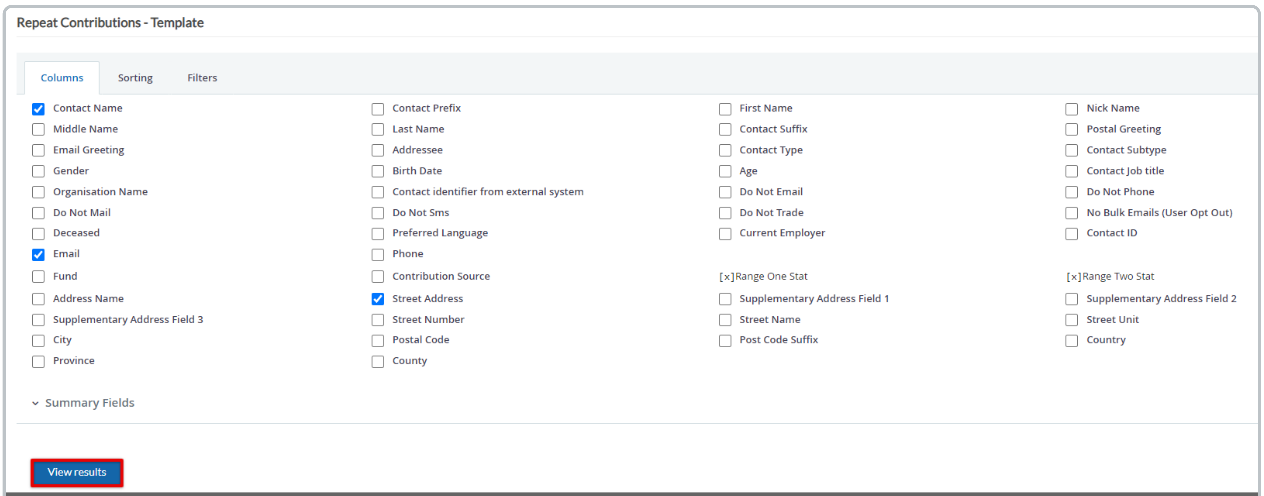
Select **“is greater than or equal to”** from the drop-down menu. Now you can input the **minimum** contribution amount you would like to see generated in your report (i.e. 1500). Recall that the **Initial Date Range** is set as ***"Previous calendar year"***. By applying a **Range One Amoun**t filter, we will restrict the results in the Report to only display donors who have contributions greater than or equal to ***$1500*** over the ***previous calendar year***.



Select "Is greater than or equal to" from the drop-down menu and add a minimum contribution amount

Note: The ***Initital Date Range*** filter is linked to the ***Range One Amount*** filter. The ***Second Date Range*** filter is linked to the ***Range Two Amount*** filter. Utilize both the ***Range One Amount*** and ***Range Two Amount*** filters to narrow down your results further to include only **Repeat Donors** across the 2 date ranges.

11. Go to **Columns** and select additional details to display, such as **Contact Name**, **Street Address** and **Email** then click **View Results**

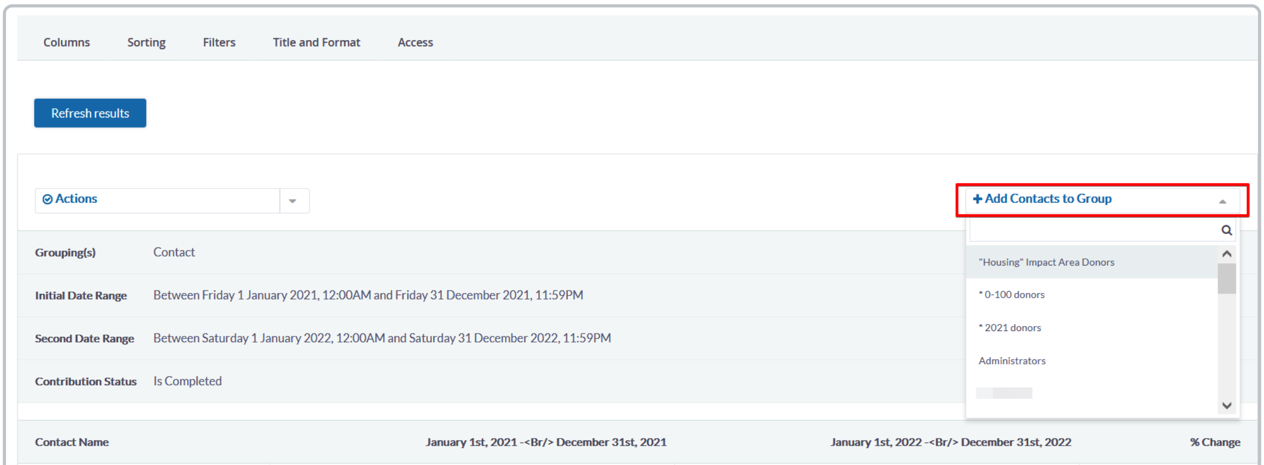


Select Contact Name, Street Address and Email

12. Now you can see your contacts **who contributed over your specified amount** (i.e. $1500) and the number of donations within that selected time frame.

What's Next?

- With this list of top tier donors who have contributed over $1500 in the previous calendar year, we can add these Contacts to an existing Group and then communicate with the Group in bulk:



Add Contacts to an existing Group

If your Group does not yet exist, build a blank Group so that these Contacts can be added.

Creating a Blank Group

A blank contact group is a Group without any contacts in it.

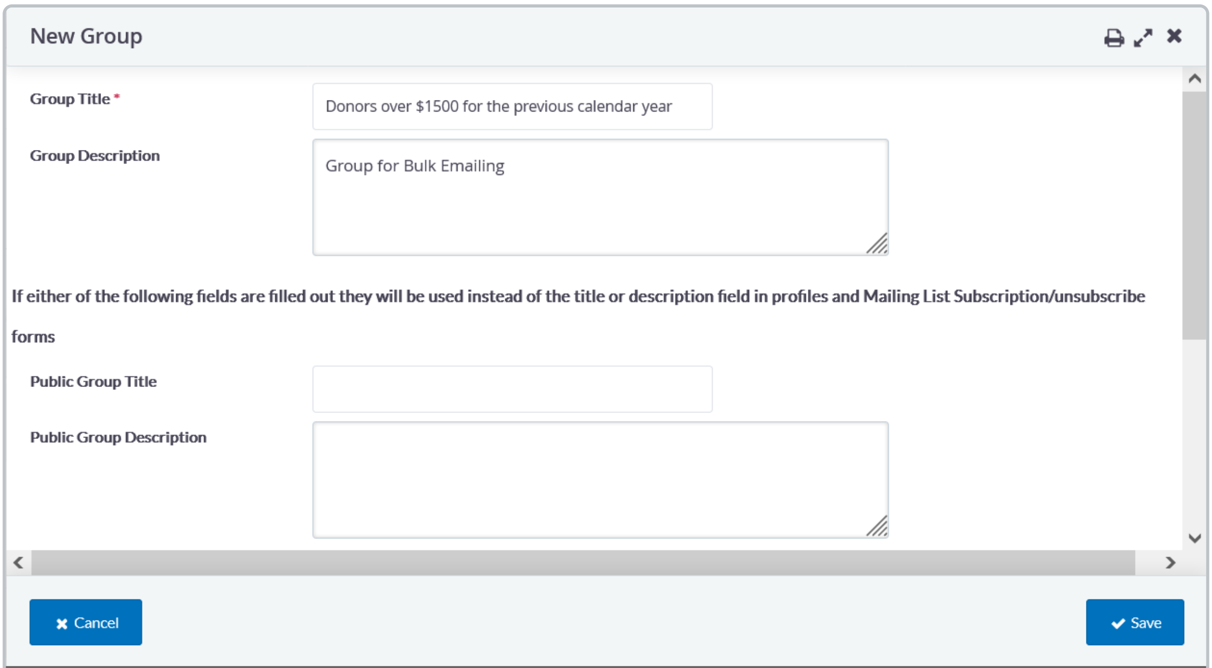
From the Manage Groups Page

1. Go to the **Contacts Tab**

2. Select ***Advanced Actions*** on the top right corner of the screen and then ***Manage Groups***

3. You will be directed to the **Manage Groups** Page. Select the **Add Group** button on either top or bottom of the page

4. A ***New Group*** popup will show up with the following information:



Give your blank Group a title and description

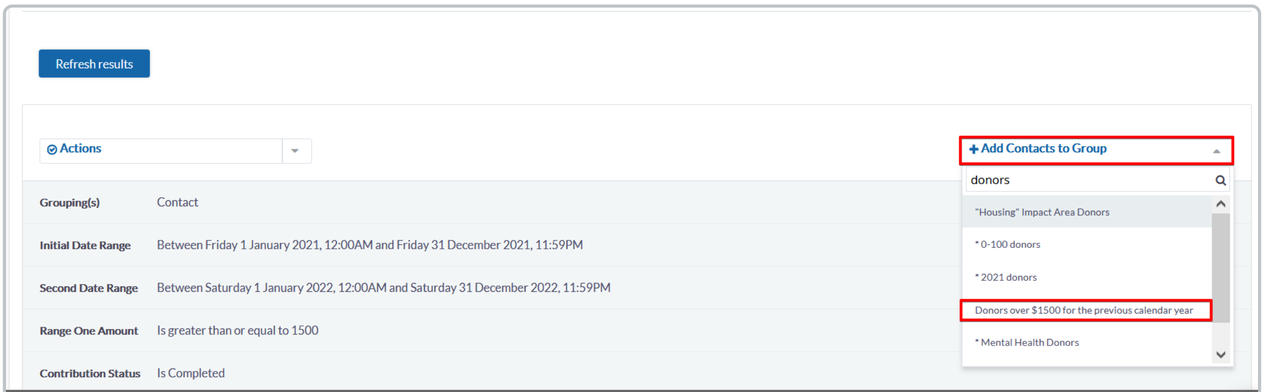
Fields:

- ***Group Title:*** the name of the Group.
- ***Group Description:*** optional description of the Group.
- ***Public Group Title/Description:*** Use an alternative title and description that will display to your donors while unsubscribing from a Bulk Email. The Group title will display to your unsubscribing email receipients if the Public fields are not filled out.

5. After filling out all the necessary information, select ***Save***

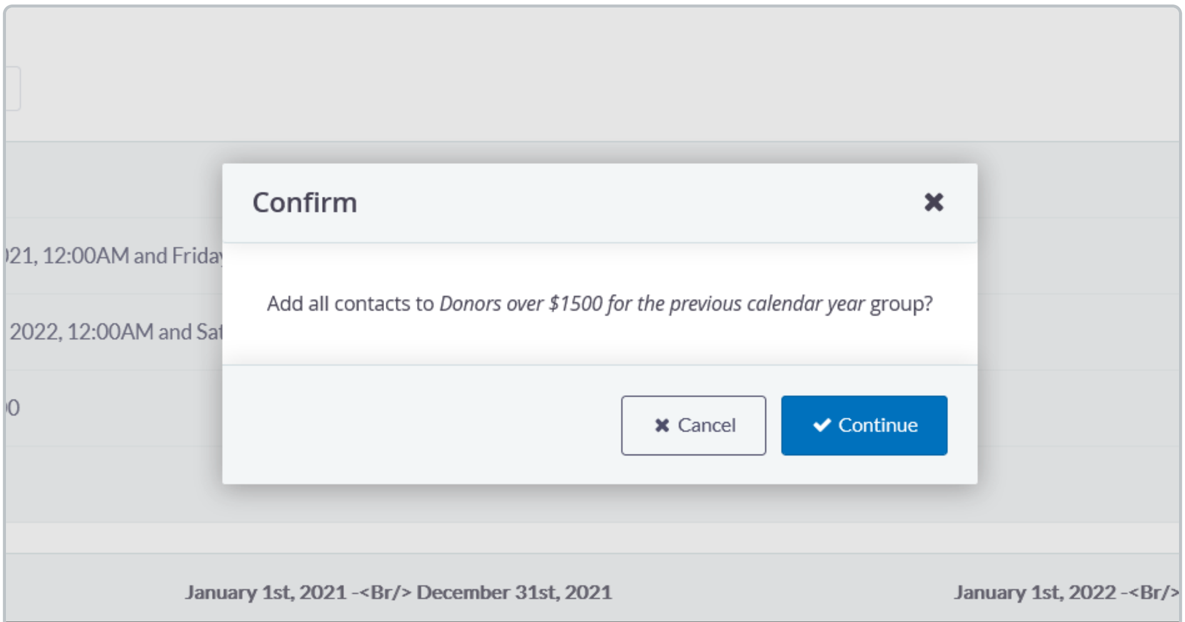
6. Next, you will be prompted to add Contacts to the Group. However, simply navigate away from the page, as we will not add any Contacts to this blank Group yet.

7. Finally, navigate back to the ***Repeat Contributions*** Report that has been generated with the top donors for the previous calendar year. Now, we can select **Add Contacts to Group.** If needed, search for your newly-made Group



Add Contacts to new Group

8. Select ***Continue*** to confirm the addition of these Contacts to the blank Group



Confirm

Now, we can communicate with these top donors in unique and personalized ways:

Learn more about Bulk Emails in your DMS

Learn more about communicating with your donors in other ways