

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?

Watch our Training Webinars
here

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](#)

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Dashboard Contacts Contributions Campaigns Opportunities **Reports** DMS Mail

Settings | Help

DMSCA DMSCA

CanadaHelps DMS Reports [Need Help?](#)

New Report

- My Reports
- Contribution Reports
- Contact Reports
- Opportunity Reports

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**

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Create New Report from Template

Create reports for your users from any of the report templates listed below. Click on a template title to get started. Click Existing Report(s) to see any reports that have already been created from that template.

Contribution Report Templates

General Contribution Reports

Contributions (Summary)	Existing Report(s)	Total amounts raised
Repeat Contributions	Existing Report(s)	Total amounts raised from repeat Contributions
Top Donors	Existing Report(s)	Top Donors for a defined date range
SYBUNT		Total amounts raised from Some Years But Not This Year
LYBNT	Existing Report(s)	Total amounts raised from Last Year But Not This Year

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

Repeat Contributions - Template

Columns Sorting **Filters**

<input checked="" type="checkbox"/> Contact Name	<input type="checkbox"/> Contact Prefix	<input type="checkbox"/> First Name	<input type="checkbox"/> Nick Name
<input type="checkbox"/> Middle Name	<input type="checkbox"/> Last Name	<input type="checkbox"/> Contact Suffix	<input type="checkbox"/> Postal Greeting
<input type="checkbox"/> Email Greeting	<input type="checkbox"/> Addressee	<input type="checkbox"/> Contact Type	<input type="checkbox"/> Contact Subtype
<input type="checkbox"/> Gender	<input type="checkbox"/> Birth Date	<input type="checkbox"/> Age	<input type="checkbox"/> Contact Job title
<input type="checkbox"/> Organisation Name	<input type="checkbox"/> Contact identifier from external system	<input type="checkbox"/> Do Not Email	<input type="checkbox"/> Do Not Phone
<input type="checkbox"/> Do Not Mail	<input type="checkbox"/> Do Not Sms	<input type="checkbox"/> Do Not Trade	<input type="checkbox"/> No Bulk Emails (User Opt Out)
<input type="checkbox"/> Deceased	<input type="checkbox"/> Preferred Language	<input type="checkbox"/> Current Employer	<input type="checkbox"/> Contact ID
<input type="checkbox"/> Email	<input type="checkbox"/> Phone		
<input type="checkbox"/> Fund	<input type="checkbox"/> Contribution Source	<input type="checkbox"/> [x]Range One Stat	<input type="checkbox"/> [x]Range Two Stat
<input type="checkbox"/> Address Name	<input type="checkbox"/> Street Address	<input type="checkbox"/> Supplementary Address Field 1	<input type="checkbox"/> Supplementary Address Field 2
<input type="checkbox"/> Supplementary Address Field 3	<input type="checkbox"/> Street Number	<input type="checkbox"/> Street Name	<input type="checkbox"/> Street Unit
<input type="checkbox"/> City	<input type="checkbox"/> Postal Code	<input type="checkbox"/> Post Code Suffix	<input type="checkbox"/> Country
<input type="checkbox"/> Province	<input type="checkbox"/> County		

Select Filters

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.

Contact Subtype	Is one of	- select -
Contact Modified	Any	
Deceased	Is equal to	Any
Do not email	Is equal to	Any
Do not phone	Is equal to	Any
Do not mail	Is equal to	Any
Do not SMS	Is equal to	Any
Do not Trade	Is equal to	Any
Do not bulk email	Is equal to	Any
Preferred Language	Is one of	- select -
Percentage Change	Is less than or equal to	
Initial Date Range	Previous calendar year	
Second Date Range	This calendar year	

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.

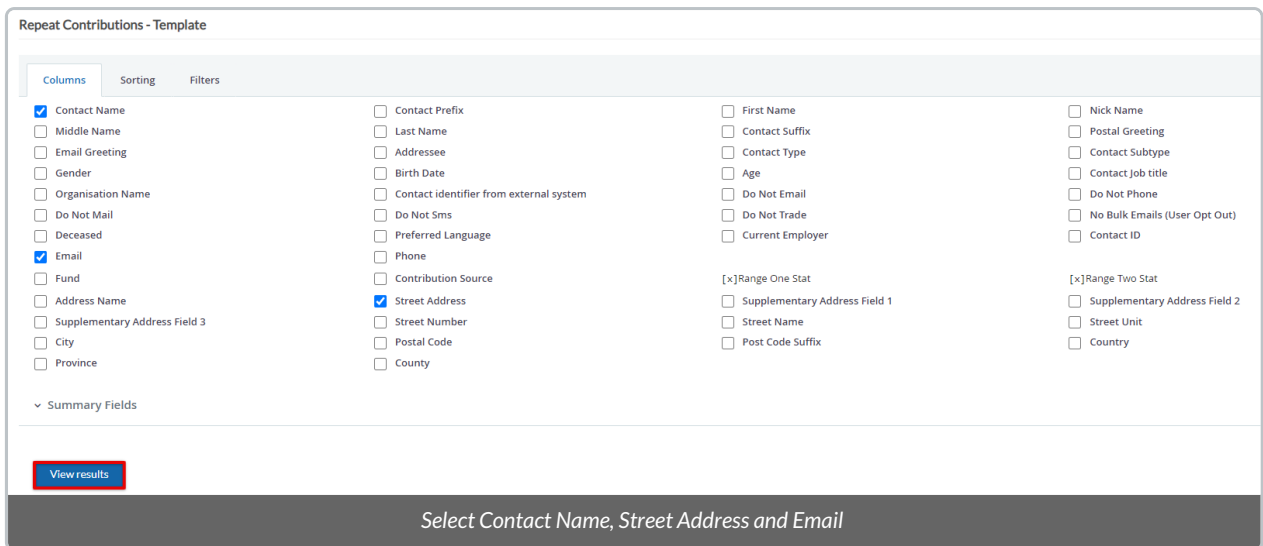
Select **“is greater than or equal to”** from the drop-down menu. Now you can input the **minimum** contribution amount you would like to see generated in your report (i.e. 1500). Recall that the **Initial Date Range** is set as **“Previous calendar year”**. By applying a **Range One Amount** filter, 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**.

Initial Date Range	Previous calendar year	
Second Date Range	This calendar year	
Range One Amount	Is greater than or equal to	
Range Two Amount	Is greater than or equal to	
Fund	- select -	
Contribution Status	Completed	
Street Address	Contains	
Postal Code	Contains	
City	Contains	
Country	Is one of	- select -
Province	Is one of	Choose country first
County	Is one of	Choose state first
Tag	Is one of	- select -

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

Note: The *Initial 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.

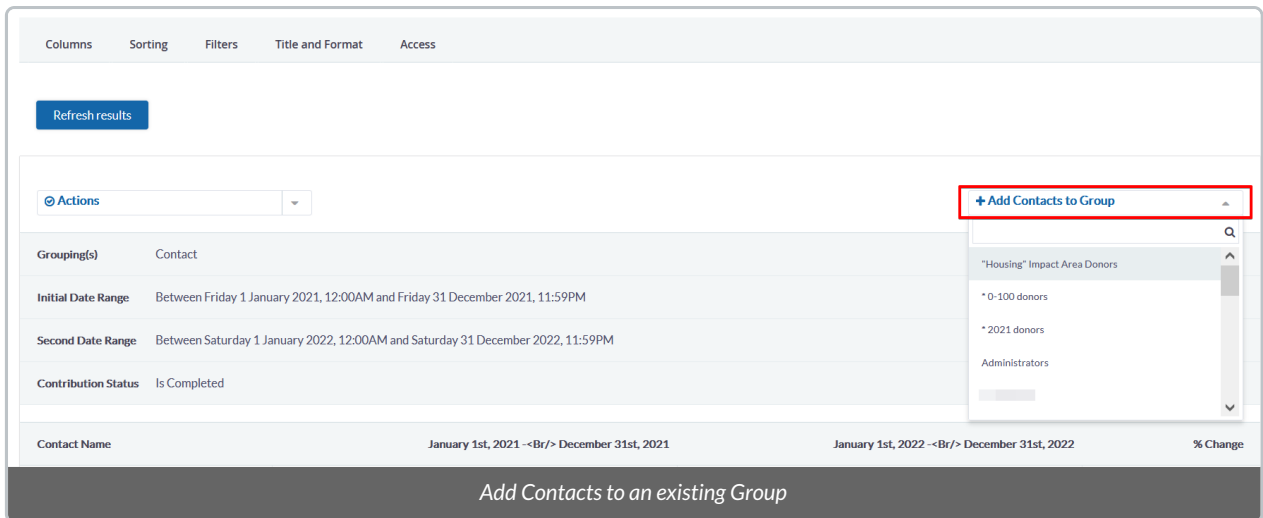
11. Go to **Columns** and select additional details to display, such as **Contact Name**, **Street Address** and **Email** then click **View Results**



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:



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:

New Group

Group Title * Donors over \$1500 for the previous calendar year

Group Description Group for Bulk Emailing

If either of the following fields are filled out they will be used instead of the title or description field in profiles and Mailing List Subscription/unsubscribe forms

Public Group Title

Public Group Description

Give your blank Group a title and description

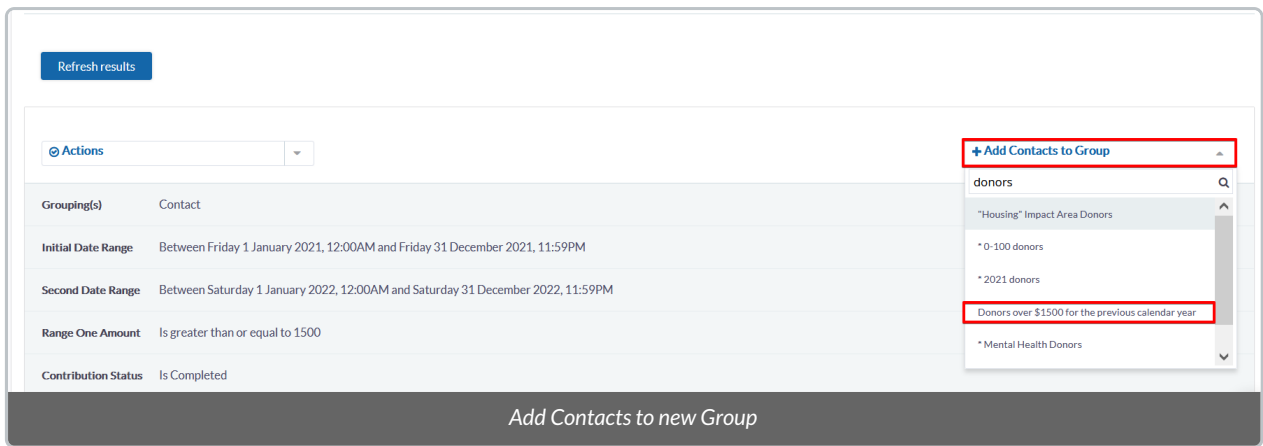
Fields:

- **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 recipients if the Public fields are not filled out.

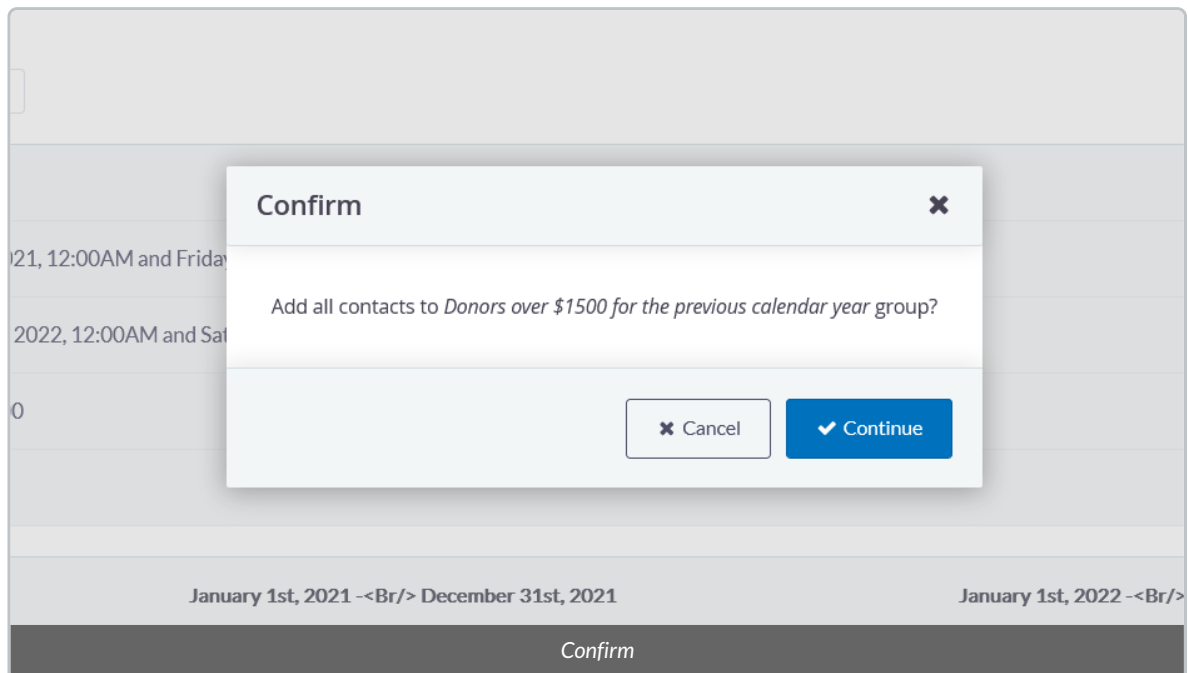
5. After filling out all the necessary information, select **Save**

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



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



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](#)