

# How to Use SYBUNT – Donations received Some Year But Not This Year

## SYBUNT

This report searches through ALL donors' donations and finds donors who have given at one point, but not in the year specified. The report does not include contacts who have never donated. Typically, one picks the current year to find donors who have not given the current year. Since the report includes ALL donations, organizations with many years' of donation history may want to make a group of donors covering the prior five years, for example, and then use that group as a filter. Therefore the results will show who has donated at some point in the last five years, but not in the year in question.

You will find the report template by going to Reports>Contribution Reports>New Contribution Report>SYBUNT Report. It's located at <https://SITE.ourpowerbase.net/civicrm/report/contribute/sybunt> where SITE is the name of the PowerBase site.

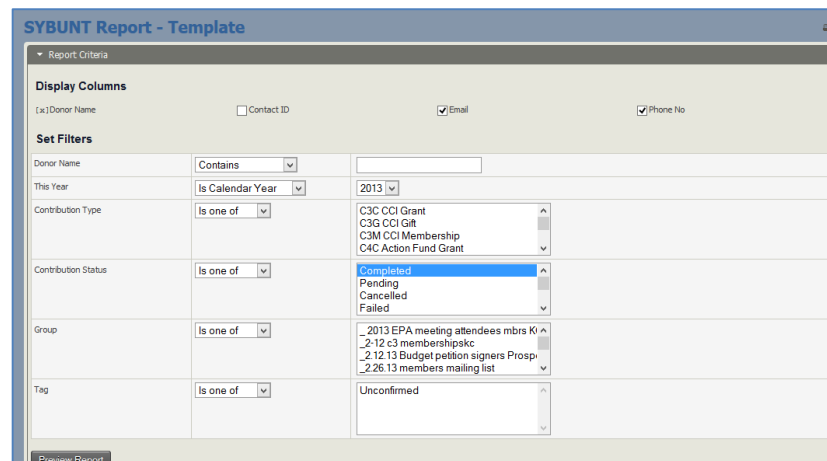
To run this report, enter the year for which you are trying to find folks who have not donated in the "This Year" field. Select whether you are using calendar year or fiscal year. This report uses the fiscal year cutoff as defined in the date settings here:

<https://SITE.ourpowerbase.net/civicrm/admin/setting/date?reset=1> where SITE is the name of the PowerBase site.

Select the Contribution Types to be considered. If none are selected, all are included.

Select Contribution Statuses to be included. In almost all cases, the default of "Completed" is the best selection.

Select a Group, if desired. If none are selected, all contacts are included. In addition to the example above, other possible reasons for using a group would be to select only individuals or only organizations.



The screenshot shows the 'SYBUNT Report - Template' interface. It features a 'Report Criteria' section with 'Display Columns' and 'Set Filters' options. The 'Set Filters' section includes fields for Donor Name, This Year, Contribution Type, Contribution Status, Group, and Tag. The 'This Year' field is set to 2013. The 'Contribution Status' dropdown is open, showing 'Completed' selected. The 'Group' dropdown is open, showing a list of groups including '\_2013 EPA meeting attendees mbrs Ki', '\_2-12 c3 membershipskc', '\_2-12 13 Budget petition signers Prosp', and '\_2-26 13 members mailing list'. The 'Tag' dropdown is set to 'Unconfirmed'. There are checkboxes for 'Contact ID', 'Email', and 'Phone No' in the 'Display Columns' section.

Select a Tag, if desired. If none are selected, all contacts are included.

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The results displayed will show a row with each donor and columns for the prior three periods and a total for the periods before that, and a life time total donation.

**SYBUNT Report - Template**

Report Criteria  
Create Report

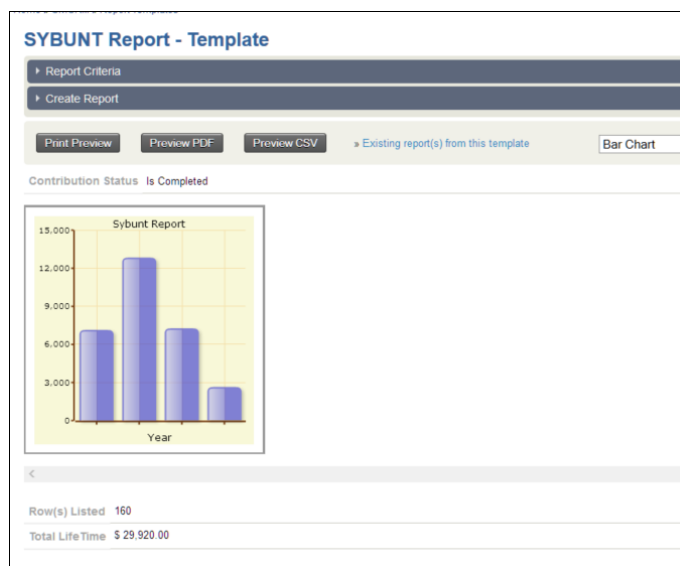
Print Preview Preview PDF Preview CSV Existing report(s) from this template Tabular View

Contribution Status Is Completed

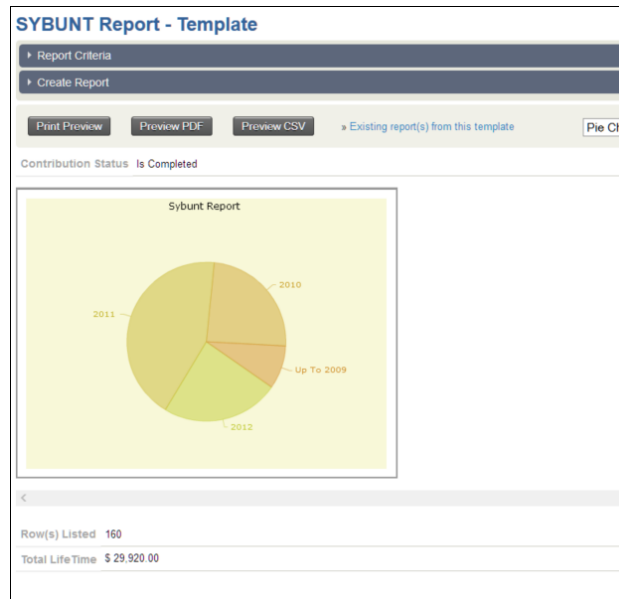
Next > Last >> Records 1 - 50 of 160 Page 1 of 4 Go

Donor Name	Email	Phone	Up To 2009	2010	2011	2012	LifeTime
Bair, Lela	abc1@example.com	330-555-1234			\$ 25.00	\$ 25.00	\$ 50.00
Price, Laureen	abc2@example.com	330-555-1235			\$ 30.00	\$ 30.00	\$ 60.00
Moore, Latrial	abc22@example.com	330-555-1255			\$ 10.00	\$ 10.00	\$ 20.00
Pelger, Steven	abc27@example.com	330-555-1260		\$ 60.00	\$ 120.00	\$ 60.00	\$ 240.00
Jones, Richard	abc39@example.com	330-555-1272		\$ 60.00	\$ 120.00	\$ 60.00	\$ 240.00
Clark, Derrick	abc40@example.com	330-555-1273	\$ 180.00	\$ 120.00	\$ 120.00	\$ 60.00	\$ 480.00
Hollis, Rosalie	abc58@example.com	330-555-1291			\$ 10.00	\$ 10.00	\$ 20.00
Jones, Sharon	abc76@example.com	330-555-1309		\$ 60.00	\$ 120.00	\$ 60.00	\$ 240.00
Washington, Charlene	abc87@example.com	330-555-1320		\$ 60.00	\$ 120.00	\$ 60.00	\$ 240.00
Rodino, Ariene	abc136@example.com	330-555-1369	\$ 180.00	\$ 120.00	\$ 120.00	\$ 60.00	\$ 480.00
Osborne, Rose	abc160@example.com	330-555-1393		\$ 60.00	\$ 120.00	\$ 60.00	\$ 240.00
Mound, Kimberly	abc182@example.com	330-555-1415			\$ 30.00	\$ 30.00	\$ 60.00

You can also display the annual totals as results in a bar chart or a pie chart. It does not show the individuals.



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If you want to make a smart group of lapsed donors, go to Search>Advanced Search and use the custom field set of Summary Fields. Put a 1 in the “From” box for “Total Lifetime Contributions” and leave the “To” box empty. Then put a 1 in the “To” box of “Total Contributions this Year”.

The screenshot shows the 'Summary Fields' search criteria form. It has two rows of fields. The first row is for 'Total Lifetime Contributions' with '1' in the 'From' box and an empty 'To' box. The second row is for 'Total Contributions this Year' with an empty 'From' box and '1' in the 'To' box. The '1's are highlighted in yellow.

Press Search to get the results. Select all the resulting records. Take the action to create New Smart Group. Click Go. Then name and create your new smart group. Mark it as “Mailing List” so you can send emails to the group.