New Contributor Report

Introduction

The **New Contributor Report** is designed to give you a quick look at the number of new donors for multiple time periods. It gives you a count of the new donors for the time periods you select. Time period length defaults to quarters, but can be annual, semi-annual or monthly as well. It can be displayed as a list or as a bar chart. The report will also provide these subtotals for each time period selected:

- Total Amount Contributed
- Total Number of Contributions
- Average Value of Contribution
- Largest Contribution
- Smallest Contribution

Preparing to Run the Report

The **New Contributor Report** is one of the Contribution Reports Templates available off of the **Reports>Contribution Reports** menu's **New Contribution Report** button. It will be available as a template only after two software extensions have been enabled on your site. If it's not there, you'll have to install the software extensions. It's outside the scope of this document to describe installing the software extensions, so see your PowerBase administrator or reach out to PowerBase Support for assistance installing them.

This is an easy report to create, you can accept the defaults and click preview report to see the results, but if you've never created a report, you might find it helpful to review the **Creating Reports – Basics** document before proceeding. This document will assume that you are familiar with the basic report creation process in PowerBase.

New Contributor Report

Setting Filters

Filter Setting	Description
End Date of Reporting Period	Defaults to the end of the last quarter, but it can be changed
Contribution Time Interval	Defaults to Quarterly, but can be Monthly, 6 Months, or Annual
Number of periods to show	Defaults to 4, but can be changed. You might select 5 to see results of the same quarter last year, for instance.
Number of months to look back	Defaults to 120 which is 10 years. The "look back" period excludes the donors who gave more than once during this period. If you consider a new donor to be someone who hasn't given in 5 years, you would change this to 60 months.
Contribution Status	Defaults to "Completed". No need to change this in most situations.
Financial Type	Pick the Financial Types that are significant as donations. Exclude merchandise, event fees and other unrelated income. If you don't pick any, all will be included.

New Contributor Report

Payment Type	In most cases, there is no need to pick any of these. If none is selected, then all Payment types will be included.
Contribution Amount	If you have a reason to filter for donation size, this is the place to set the donation size and the rules you would like to apply. Keep in mind that a new donor may be someone who gave one or more donations at some point which did not meet the criteria that you select.
Campaign	Defaults to all Campaigns
Group	Defaults to every contact If no group is selected.

Preview Report

Click on Preview Report to bring the results up. The initial results will be in Tabular form, but you can change it.
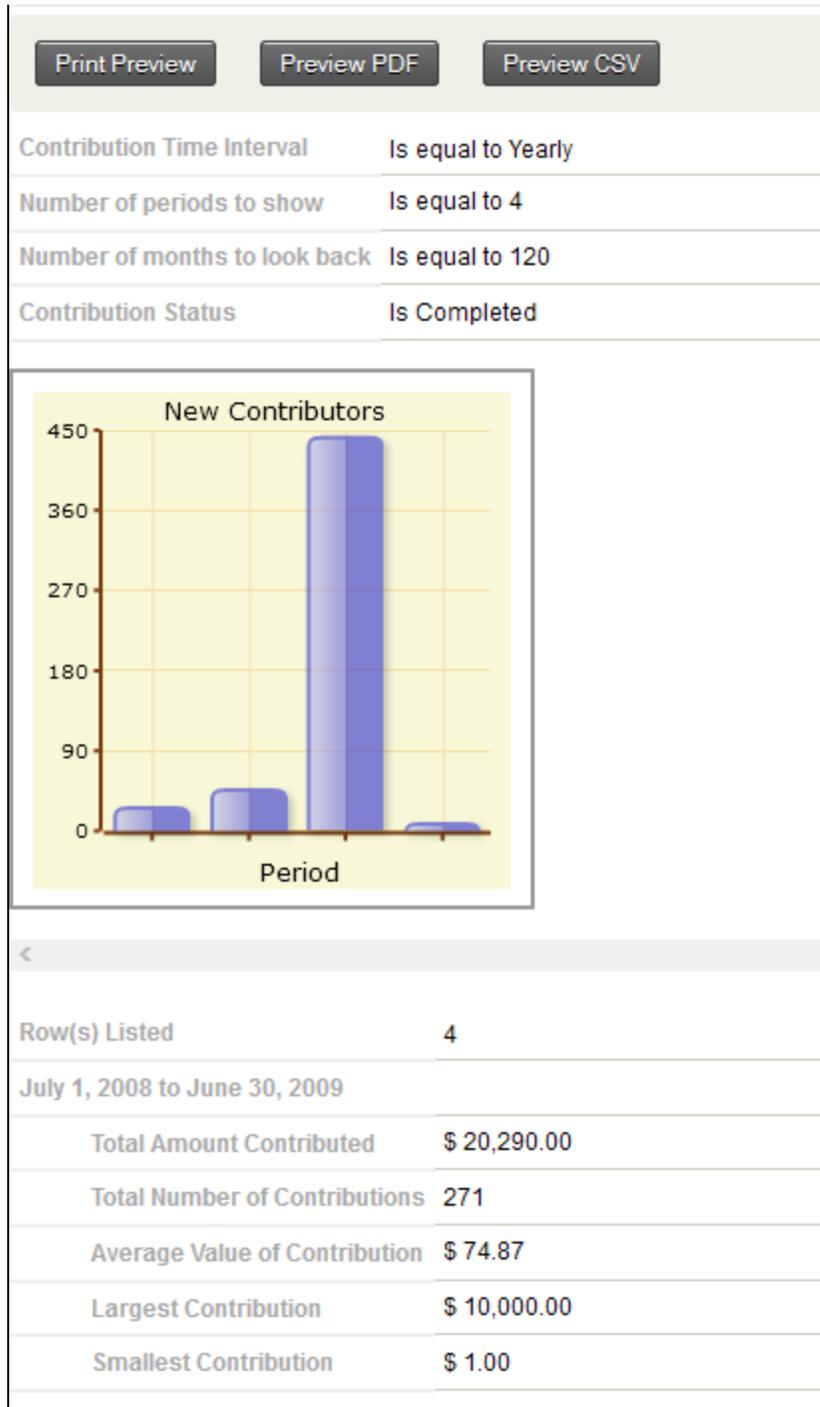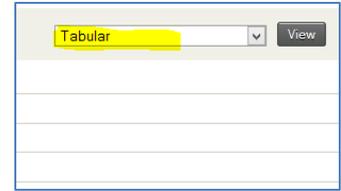

You can drill down by clicking on the numbers in blue. This will bring up the **Donor Behaviour Detail Report** showing the supporting details. The **Donor Behaviour Detail Report** is described in a separate document.

Progressive Technology Project
9/19/2013

New Contributor Report

Bar Chart

To change it to a Bar Chart Report, change the View field from "Tabular" to "Bar Chart" and click View.

The result will be something like this next screenshot.

Progressive Technology Project
9/19/2013

New Contributor Report

Dashboard

One you preview your report, you have the option of saving it and, optionally, to make it available for a Home page Dashboard. Details of that process are explained in the **Creating Reports – Basics** document referred to above.

This is how the bar chart would appear on the dashboard. Remember that you will have to occasionally update the period end date to keep it current.

Progressive Technology Project
9/19/2013