



Data Miner Platinum

DataMinerPlatinum allows you to build custom reports with advanced queries. **Reports > DataMinerPlatinum**

Click **Add New Record**. Move through the tabs along the top to build your report, with the end result being **Review Data** and the ability to **Export to Excel**. DataMinerPlatinum's purpose is to build spreadsheets; whether a "report" or a "mailing list".

Data Export Selection:

WHERE in the program is the information located?

Remember if you choose donation/interaction/notes reports, etc., you will get all the Contact fields as well.

Field Export Selection:

WHAT information do you want to see on the report?

Drag fields to the center box that you want included in your report (such as all address fields for a mailing)

Query

Create the limitation for your results, for example:

ContactType = Business

DonationDate **between** and select two dates, to give you a date range

You can have multiple **FIELDS** for your query, separated by AND and OR

AND will give you LESS results, because it limits the criteria to those that are both #1 AND #2 at the same time: only contacts listed as businesses AND have donated between the date range

OR gives you MORE results. Results can be one of the other: all businesses regardless of when they've donated, so you'll get businesses that have donated *whenever*, and everyone (not just businesses) that donated within the date-range.

Use Quotations for multiple choices:

For example, you want Businesses that have not donated to the Annual Appeal or Membership

ContactType = Business

AND

(

DonationAppeal != Annual Appeal

AND DonationAppeal != Membership

)



Review Data & Export

Use the GRID to sort & Filter

Sort by clicking on the Headings, such as LastName will sort all results by last name

Filter by using the drop-down boxes. Such as DonationAppeal, type in "Annual".... Will give you only donations to the AnnualAppeal (because the Appeal code contains the word Annual)

Summary vs Detail

When performing a Donation/interaction/persona, etc., report (any report other than Contact reports), you can choose between a **Detail** or **Summary** report.

For example, a donation report:

Detail will list ALL donations.

If you want to see all donations to a particular campaign, select **Detail**. Contacts may be listed multiple times because they made multiple donations. Each donation will be listed.

****Do Not select Detail if you are sending a mailing, or sending the list to Constant Contact (or other email program) because contacts might appear multiple times. OR alternately you can export to excel, and manually delete out the duplicates.**

Summary will SUMMARIZE donations.

This will list each contact ONE time, summarizing their detail (giving the Total of donations made, or the Number of times they donated).

When you select **Summary**, you will need to choose an **Aggregate** on the **Field Export** tab.

Lapsed Donor – Gave in 2013, but not 2014

Data Export – CONTACT

While this report is on donations, it is on donation totals which are actually located on the Contact screen. Remember when you go to Community/Contacts, and on the GRID the program lists LTD (lifetime to date) and YTD (year to date) totals. This is Contact information.

For this report, we are going to use those Totals fields: Contacts who's **Prior Year** is greater than Zero, who's **Year to Date** is Zero (they gave last year, have not given this year)

***Make Sure your system date is correct under Maintenance > Site-Setup > Additional Site Options

Fields Export

What do you want to see on the report?

Are you doing an Appeal mailing? Export all the mailing fields:

First/Last

Acknowledgement

Salutation

Address fields

LabelLines, maybe

Required in order to run the report

DonationAmountPriorYear

DonationAmountYTD

(instead of using a Query, we will use the filters on the Review data tab, so **MUST** have the PriorYear and Year-to-Date fields)

Query

No query needed; will use the Filter on the Review Data tab.

If you wanted to use the query instead of filtering on the Review Data tab, add two fields, the second one has an AND:

DonationAmountPriorYear **Greater than or equal to 1**

AND DonationAmountYTD **Equal to 0** (zero)

Review Data

If you did not use the query tool, filter your report here:

In the data-entry field underneath **Prior Year** and type 1.

Click the arrow next to the data-entry field, and select **Greater than or equal to**

In the data-entry field underneath **Year to Date** type 0 (zero).



Notes Report

Data Export – NOTES

**Remember that this will ONLY give you those Contacts WHO HAVE a note filled out

Field Export

What do you want to see on the report?

Note fields of Date, Type, & Comment

Name/Address/Contact information for the person

Query

No query needed

Consider:

NotesComment **Contains** (word)

to search the notes fields for a specific word
(Smith, or small)

or limit Contacts, such as:

ContactType **equals** Business, or

Relationship **equals** Board Member

Remember:

(=) equals (includes)

(!=) does NOT equal (will not include)

Review Data

Use the filter options here to search notes.

In the data-entry field under **NotesComments**
type “small” and you will get only those who
have a note that contains the word Small.

Make sure to Save Changes before clicking the
EXPORT button.



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How many donations did they make last year?

Data Export – DONATION, Summary

Donation report because we only want those who have donated (in order to count how many donations they have made)

Summary will list EACH CONTACT only one time on the list, summarizing their donation history

****remember this will give you only those who have a donation filled out**

Field Export

What do you want to see on the report?

Are you doing a mailing?

Export out all the fields necessary for mailing

DonationIPK

Change Aggregate (Right column) to **COUNT** (which will literally count how many donations they have)

DonationAmount

change aggregate to **SUM** (which will total their donation history)

Consider including:

DonationAmountLast

DonationDateLast

Query

No query needed at this time. Could come back and filter only those Businesses, or query

DonationDate **between** 1/1/2013 and 12/31/2013

To total only those donations made this year

Review Data

Use the filter on the grid:

In the data-entry field below

(COUNT)DonationIPK type in 3... and this will give you only those that have made 3 donations.

Use the arrow next to the data-entry field and change to Greater than or Equal to, and it will give you those that have made 3 or MORE donations.



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First Donation in 2013

Data Export – CONTACT

Contact report because DonorSnap generates a DonationDateFIRST and DonationAmountFIRST and these fields are located on the ContactTab of data.

Field Export

What do you want to see on the report?

Are you doing a mailing?

Export out the fields necessary for mailing

Consider including:

DonationAmountYTD (year to date total)

DonationAmountLast

DonationDateLast

Query

DonationDateFirst >= 1/1/2013

Will fill all those whose first donation was made in 2013.

Review Data

Your results.

Sort by LastName or DonationDateFirst if needed.



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Specific Campaign or Appeal

Or could run a Donation Activity > DonationsReceived Report or
FundDevelopment > Fundraising by Campaign or Appeal

Data Export – DONATION, detail

Donation report because we need the Campaign or Appeal code, which lives on the donation page.

Detail to list EVERY donation, even if a contact donated more than once. So you might see a contact listed multiple times... this is because they donated multiple times.

****remember this will give you only those who have a donation filled out**

Field Export

What do you want to see on the report?
Are you doing a mailing?
Export all fields necessary for mailing

Consider:

DonationDate

DonationCampaign

DonationAppeal

DonationAccounting

DonationComments

And any User-Defined fields you have on the Donation page

Query

Campaign = (choose the one you want)

Consider adding:

DonationDate **between** a certain range to limit your results

Review Data

Sort & filter the grid as desired. Remember to **Save Changes** before you export.



Other Reporting Options:

Don't forget that DonorSnap has many reports pre-built for you. Try the options below for quick & simple reports that do not require DataMinerPlatinum

- How much money did we bring in this week? **Reports – Donation Reports – DonationsReceived**
 - Select the date-range you are interested in
- How many In-Kind donations have we had this year? **Reports – Donation Reports – DonationsReceived**
 - In the Selected DonationTypes (is defaulted to include ALL), use the << (double arrow) to move ALL DonationTypes to the left, and move InKind back to the Selected box
- How much money did we make on an Appeal/Campaign: **Reports-Donation Reports – DonationsReceived**
 - Select the Appeal/Campaign from the filters on the Right of the screen
 - OR **Reports – Fund Development – FundRaising by Appeal/Campaign**
- Everyone who has not given to my appeal: **Reports – Donation Reports – Excel Giving/NON-giving**
 - Select the appeal/campaign
 - Export the NON-giving report
- Everyone who has given 1000 or more: **Reports – Fund Development – Donation Strata**
 - Select your criteria from the totals on the Right (First line: 1000, Second line: 500)
 - Choose whether a **Summary** report (what they have given in their lifetime, or in a specific date-range)
 - Choose a **Detailed** report (will show individual donations of 1000 or more; becomes a **Capacity** report)
- What did they give in 2012 versus 2013? **Reports – Fund Development – DonationComparison by Donor**
 - Enter two different date-ranges to compare