



## DataMiner Platinum Intermediate Walkthrough:

**"A must read for all DonorSnap users!"**

DataMiner Platinum is an incredibly helpful tool for all DonorSnap users. It allows you to export a targeted group of people from your database along with specific information that you wish to see related to each contact in that group. There's only one problem... "How am I supposed to use it?"

Yes, DMP can require thinking. And yes, it can be a valuable asset. I don't mean to scare you, but to use the advanced features of DMP effectively, you need strong math skills. This is where you wish you had paid attention to your high school math teachers when they told you that you would use all those math skills later on in life. In fact, my wife is a high school math teacher... I'm going to add it to her list of everyday life math examples.

If you feel like you struggle using DMP, I hope to help you break it down a bit. The best way to start is by drawing a picture on paper so that you know exactly what you are doing and what you are looking for. It's amazing how a targeted query becomes very manageable once you write it down and see it with your eyes. This is always our first step at DonorSnap when we create a new query. It really does wonders.

Now I want to walk you through an example of how I go through creating a query.

### Prepare for the Query

(Get out your pencil and paper)

#### 1. What is my SITUATION?

I have a new opportunity for a small group of my donors. We do not need much money, so I want to give the opportunity first to the people who are closest to our mission and have responded to similar opportunities in the past.

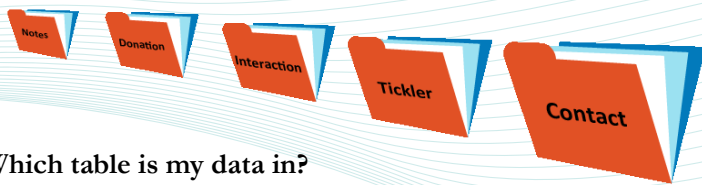
#### 2. What is my ACTION?

I want to send one email campaign to my small group of donors to announce the special need.

#### 3. Who is my TARGET?



## 4. Where is my Data?



### Which table is my data in?

- Contact
- Address
- Donation
- Pledge
- Interaction
- Tickler
- Volunteer
- Notes
- Affiliated

As a default, I should always use the contact table unless I need information from another table. If you choose another table, you will still be able to access contact information.

Since I want to query based on donation information, I know I need to use the donation table. Keep in mind that it is only possible to select one table per query. You cannot select both donation information and interaction information. That would require running two separate queries to receive your data.

### Additional Info: Understanding DonorSnap Data Storage

All of the data in your DonorSnap database is stored in tables. You see these tables as the tabs available for each contact record. I think of it like a room with multiple filing cabinets. The donations filing cabinet only contains donation information and any user defined fields I put on the donation tab. The interaction cabinet only contains interaction information and any user defined fields on that tab. If I have a contact that has never given a donation, then they do not have any information in the donation filing cabinet. Since there is no information in there for that contact, they will never be in the query results if you are searching the donation table.

## 5. What information do I want to export?

Since I chose a table other than the contact table, I need to decide if I want summary data or detailed data.

### Summary

- One line per contact
- Best for a list of contacts, emails, addresses, etc.
- Good for seeing numerical totals

### Detailed

- One line for each record that matches the query
- Good for reviewing information other than contact info
- Easy way to see historical information

I will choose summary because I just want email information. I don't need to know specific donation information except that they have donated to our special needs fund before.

## 6. Which fields do I need to export?

For my email campaign I only need a few fields. Here's what I'll export:

- Contact IPK (It's always good to include this field in case I need to import back into DonorSnap)
- Email Address
- First Name
- Last Name

## Set Up the Query

1. Name your batch
2. Select your data export table
3. Select your fields to export
4. Build your Query

# Build the Query or “Select your Target”

## Understanding the query builder

- **Save/Validate** Always press this before changing tabs or leaving the page. Changes are not saved automatically.
- **AND/OR** Used to link lines in the query builder together
- **( )** Parenthesis help group parts of the query just like the order of operations in a math problem
- **Field** add a new field/parameter for your query

## When to use AND vs. OR

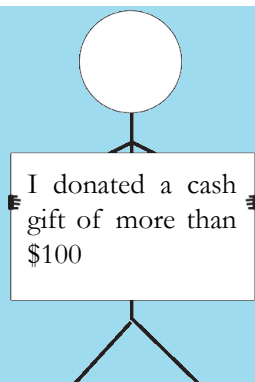
Each line must always be connected with an AND or an OR. As a default, you should choose AND to connect each one of your lines. OR should only be used in a query when you have more than one target.

When in doubt, read it like a sentence. If it makes sense to you and someone who hasn't been staring at it for a while, then it is probably correct.

Also note that when using OR, it should generally be placed inside of parenthesis.

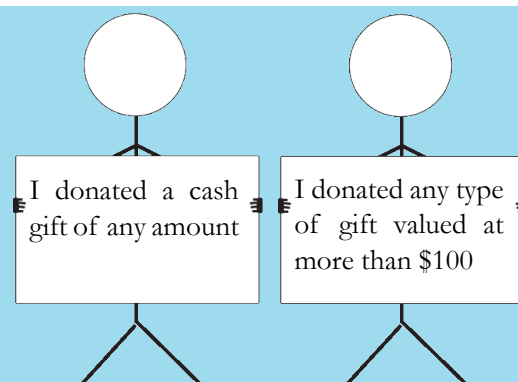
### AND

DonationType = Cash  
AND  
DonationAmount > \$100



### OR

DonationType = Cash  
OR  
DonationAmount > \$100



Building your query is another way of saying “Select your Target.” Since we already know who the target is (since we wrote it down and drew a picture already), it will not be difficult to build the query. Once you are on the “Query Builder” tab, we are ready to start.



Since we already wrote down who our target is, we can just piece it together. I know that I will need two fields, so I can go ahead and add two fields to the query. Now I need to select my fields: my user defined field “Monthly Emails” and “DonationCampaign”. I’m going to set them both with the comparison operator of “=” and a value of “Yes..” Next I need to add my AND to connect field one to field two. I am using AND because I only have one target that I am selecting.

AND/OR	Field	Comparison Operators	Value
<input type="text"/>	Monthly Emails	=	Yes
AND	DonationCampaign	=	Special Needs

## 5. Filter the data if necessary

Now is the time to filter the data if necessary. Use the filtering and sorting just as you would in every other area of DonorSnap.

## 6. Export your data to Excel and you are all finished!