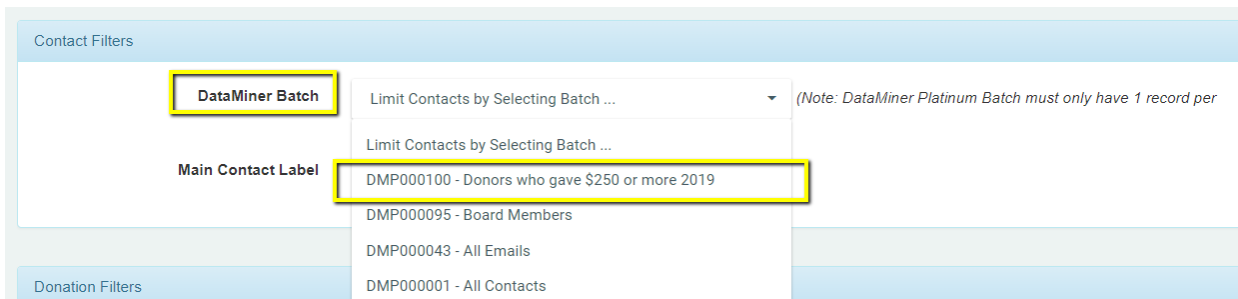


Using DataMinerPlatinum with Contribution Statements

Contribution Statements are printed or emailed within DonorSnap. In addition to filtering what statements are printed from the statement criteria page, you can generate statements from those in a specific **DataMinerPlatinum** batch.

Build your DataMinerPlatinum batch (Reports > DataMinerPlatinum).

If Printing Statements (**Reports > DonationActivity > Contribution Statements**), select the **DataMinerBatch** drop-down in the center of the screen:



Contact Filters

DataMiner Batch Limit Contacts by Selecting Batch ... (Note: DataMiner Platinum Batch must only have 1 record per

Main Contact Label DMP000100 - Donors who gave \$250 or more 2019

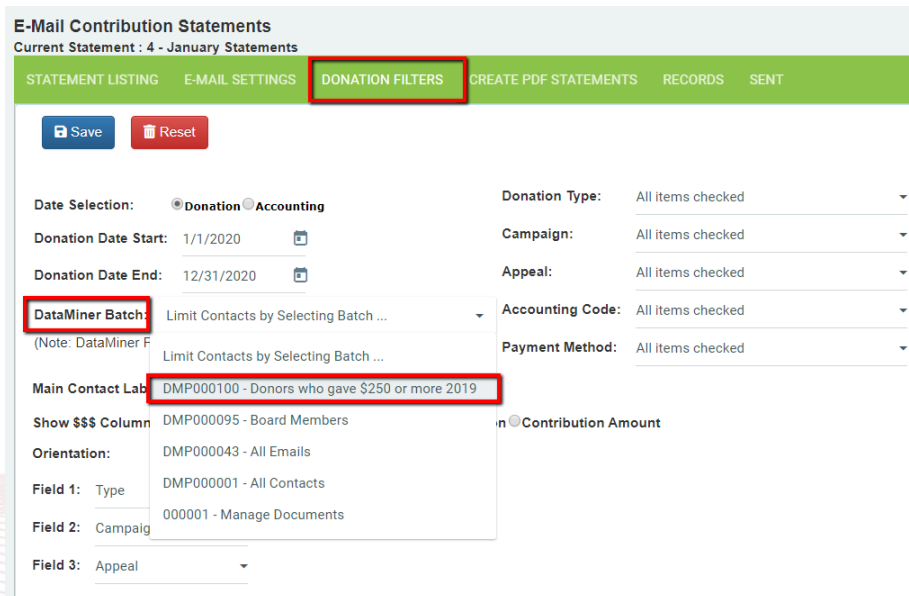
DMP000095 - Board Members

DMP000043 - All Emails

DMP000001 - All Contacts

Donation Filters

If Emailing Statements (**Processing > Contribution Statement Email**) on the **Donation Filters** tab, select the **DataMiner Batch** drop-down:



E-Mail Contribution Statements

Current Statement : 4 - January Statements

STATEMENT LISTING E-MAIL SETTINGS **DONATION FILTERS** CREATE PDF STATEMENTS RECORDS SENT

Save Reset

Date Selection: Donation Accounting Donation Type: All items checked

Donation Date Start: 1/1/2020 Campaign: All items checked

Donation Date End: 12/31/2020 Appeal: All items checked

DataMiner Batch Limit Contacts by Selecting Batch ... Accounting Code: All items checked

(Note: DataMiner F Limit Contacts by Selecting Batch ... Payment Method: All items checked

Main Contact Lab DMP000100 - Donors who gave \$250 or more 2019

Show \$\$\$ Column DMP000095 - Board Members Contribution Amount

Orientation: DMP000043 - All Emails

Field 1: Type DMP000001 - All Contacts

Field 2: Campaign 000001 - Manage Documents

Field 3: Appeal



DonorSnap

Donor Management Made Easy

When would you use this?

Many organizations do not send statements to all donors.

1. Remember that DonorSnap can email contribution statements. Once you've emailed statements to all those contacts with a valid email address, you might now need to Print statements for all those without an email address. Build a DataMinerPlatinum report of all contacts without an email address.
2. Some organizations prefer to send statements to those donors whom have given over a certain amount (such as YearToDate donations over \$100). Build a DataMinerPlatinum report of YTD donation amount of \$100 or more.
3. Sending statements to only those donors who've donated more than once throughout the year. Build a DataMinerPlatinum report counting how many times the contact made a donation.

Contacts Without Email Address

- DataExport – Contact
- FieldExport - **Note that you do not need to export Contact information fields (such as name, address, amount of donation). You only need fields necessary to build your query. For this example, drag **Email Address** only.
- Review Data – using the filter dots next to the **Email** field, choose “Is Empty”. Click **Filter**. Then **Save**.

Donors Who Have Given \$100 or more

- DataExport – Contact (because the YTD Donation amount is located on the Contact tab)
- FieldExport - **Note that you do not need to export Contact information fields. You only need fields necessary to build your query. For this example, drag **YTD Donation Amount** only.
- Query – Build a query of **YTD DonationAmount >= 100** OR use a filter on the Review Data Tab
- Review Data – If you do not want to use a query, Type 100 in the data-entry box under **YTD DonationAmount**. Use the filter dots next to the data-entry box to select “Greater Than or Equal To”. Click **Filter**. Then **Save**.

Contacts Whom Have Donated More Than Once This Year

- DataExport – Donation, and Summary (because we are filtering Donations made, AND need to have each contact listed only once)
- Field Export – You do not need contact fields (Name, address, etc.). Because we are Counting how many times a Donor appears on the list, drag the **DonationContactIPK**. In the Aggregate box to the right, select **Count**.
- Query – limit your date range, DonationDate BETWEEN 1/1/2019 and 12/18/2019
- Review Data – Use the filter dots next to the data-entry box. Type 2. Then choose “Greater Than or Equal To”. Click **Filter**. Then **Save**.