YEAR-END DATABASE PREP CHECKLIST (WITH HOW-TO LINKS!)

- ☐ [Backup database](#)
- ☐ [Recalculate gift totals](#)
- ☐ [Merge duplicate donors](#)
- ☐ [Remove inactive donors](#)
- ☐ [Review/update codes](#)
- ☐ [Review/update easy reports and filters](#)
- ☐ [Mark records with incomplete addresses as Do Not Mail](#)
- ☐ Reconcile DonorPerfect, [Payment Gateway](#), and [accounting software](#) if applicable
- ☐ [Close out pledges](#)
  - ☐ [See special instructions for pledges that will not be fulfilled](#)

For more tips and how-to guides, check out our year-end fundraising hub!

www.donorperfect.com/fundraising-hub-resources/