dp donorperfect

YEAR-END PROCEDURE GUIDE

## 1. Follow standardized data entry procedures

Clean data entry is always important, and especially at the end of the year when you may have a large influx of donor and gift data to input. Make sure you have your policies in place ahead of time to make this time of year easier on your staff and volunteers. Here are some data entry procedures to consider:

How should donor names be entered?

- Formal names or nicknames

- Join spouses with "and" or "&" or use a separate field for spouse name

- How do you track spouses with different last names?

- How do you address spouses/partners in the salutation field? (Leslie and George, Mr. and Mrs. Smith, etc.)

What are your gift entry standards?

- How do you enter in-kind gifts?

- Do you assign a gift amount to an in-kind donation?

- Do you provide a description of the donation?

- How do you track partially tax-deductible donations?

- What codes should be applied to your gifts?
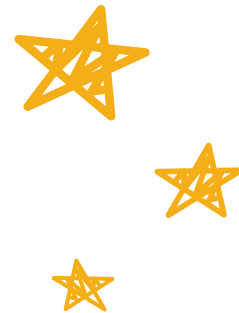
General Ledger	Track the revenue stream/fund/program a gift is donated towards
Campaign	Fundraising strategy comprised of multiple individual efforts.
Solicitation	Specific fundraising effort responsible for gifts being made, typically falls under a campaign.
Sub-Solicitation	Specific revenue stream (if there are multiple streams associated with one solicitation) Ex. ticket sales, sponsorships, raffles, etc.

Pledge Table

- What procedures do you follow for entering close-ended pledges?

- What procedures do you follow for entering open-ended pledges or recurring gifts?

- Do you receipt pledges or just pledge payments?

2. Create and assign data administration tasks

- ☐ [Recalculate](#) your database at the start of the new year and before any reports are run

- ☐ [Manage duplicate records](#) prior to end-of-year mailings and before running reports

    - ☐ Create a backup first

    - ☐ If needed, export duplicate record information prior to merge

- ☐ Perform reconciliation between DonorPerfect and any other software and/or your bank account

- ☐ Delete old/unused selection filters

- ☐ Delete old/unused Export Templates

- ☐ Delete old/unused Easy Reports and Dashboard Reports

- ☐ Create new codes for End of Year or other Upcoming Appeals

- ☐ Mark old codes as Inactive

- ☐ Delete or Deactivate inactive User accounts

- ☐ Send out final/end-of-year pledge reminders

- ☐ Close out/write-off inactive pledges

3. Perform data clean up

- ☐ Clean up constituent addresses
    - ☐ Mark records with incomplete or inaccurate addresses as Do Not Mail
    - ☐ [DP Address Updater](#) automatically refreshes your donors' contact information every night
- ☐ Remove donor records*
    - ☐ Export and save data for historical records
- ☐ Monitor record count to ensure you are not exceeding your limit
- ☐ Merge any duplicated codes

**Determine with your team when records should be removed from the database*

4. Generate and schedule year-end reports

- ☐ Create list of [reporting needs](#)
- ☐ Identify reports in DonorPerfect that will meet your needs or create an Easy Report or Export Template to meet your needs
- ☐ Determine distribution list
- ☐ Email and/or schedule reports