

# CDM+ Essentials

## YEAR-END CHECKLIST

---



- Enter all donations postmarked by Dec. 31
- Process Pending Donations
- Donor Review
  - Merge Multiple Donor Records together
  - Review Donor Records to see if “Email Statement” box is checked
  - Confirm Donor has email on Individual record
- Send statements by Jan. 31.

These items and time frames are suggestions only. Depending on the CDM+ programs you use and whether your accounting is done on a calendar or fiscal year, some items will not apply to you. Check out [january.suran.com](http://january.suran.com) for additional year-end resources, including videos and webinars.

CDM+ makes it easier than ever to stay on target and complete year-end tasks in record time. Electronically file W-2s or 941s, review giving trends, and much more in the full CDM+.

If interested in learning more about what's possible, please reach out to [sales@cdmplus.com](mailto:sales@cdmplus.com).

[january.suran.com](http://january.suran.com)