

Nonprofit Starter Pack Conversion

If you are currently using the Nonprofit Edition, which was available before 12/1/2008, you can switch to the Nonprofit Starter Pack. You will need to install the packages and follow the migration instructions, which can be found on the screensteps site:

<http://salesforcefoundation.screenstepslive.com/spaces/npsp>

The Nonprofit Edition used the Individual Account Model. If you want to stay in this Account Model, just make sure you've set the Contact field correctly. See instructions here:

http://www.youtube.com/watch?v=p3_Ux2VfbTs&hd=1

If you want to switch to the One-to-one Account Model, you'll need to set the Contact field correctly and migrate your existing data. There are two main things you need to do in this migration:

1. Create an Account for each contact and get them connected
2. Connect all Opportunities to these new Accounts

Uninstalling the Nonprofit Template

Removing the Nonprofit Template involves many things:

- Moving data you want to keep from any fields that will be uninstalled
- Removing any elements that are dependent on the packages (scontrols, tabs, buttons, etc.)
- Removing the packages

Creating Accounts for all Contacts and getting them connected

Export Contacts with Id, name, address, and phone info using a tool like the Dataloader

Use that Contact export to create Accounts with this mapping:

- Name = contact.firstname contact.lastname
- Billing Address fields = contact Mailing Address fields
- Phone = contact.phone
- Fax = contact.fax
- npe01__One2OneContact__c = contact.id

The last field in this mapping is what indicates this is a special One-to-one Account.

Take the resulting spreadsheet from the creation of those Account and use it to update the Contacts with the new Account Ids. Mapping:

`contact.AccountId = newly created Account Id for each`

Now you've got your Contacts and Accounts connected.

Modify the Opportunities to be connected to these new Accounts

Run a report of the "Opportunity and Contact Roles and Contact" type where the Account field on the Opportunity = the Individual Account Id.

Include Opportunity Id, Contact Id, and the Contact's Account Id.

Export this report to csv.

Use this set to update Opportunities, mapping:

`Opportunity.AccountId = Contact.AccountId`

This will connect the Opportunities to the new Accounts, and you can now rollup the Opportunity totals to the Accounts.