# Migrating from Raisers Edge to Salesforce

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# 1.0: Introduction

# 2.0: Data Migration

## 2.1: Data Types

Data migration from Raisers Edge to Salesforce NPSP consists of transferring data from one system to the other. To ensure a successful migration, it is important to understand the different types of data that can be migrated.  
  
When migrating data from Raisers Edge to Salesforce NPSP, the following data types can be transferred:  
  
• Contacts – This includes all contact information such as name, address, email, phone number, and any other relevant data.  
  
• Donations – This includes all donation information such as donor name, donation amount, donation date, and any other relevant data.  
  
• Events – This includes all event information such as event name, location, date, time, and any other relevant data.  
  
• Campaigns – This includes all campaign information such as campaign name, goal, duration, and any other relevant data.  
  
• Memberships – This includes all membership information such as membership type, start date, end date, and any other relevant data.  
  
• Tributes – This includes all tribute information such as tribute name, tribute type, amount, and any other relevant data.  
  
• Recurring Gifts – This includes all recurring gift information such as donor name, frequency, amount, and any other relevant data.  
  
In addition to these data types, it is possible to migrate custom fields and custom objects. Custom fields are fields that have been created by the user to store specific data, and custom objects are objects that have been created by the user to store specific data.  
  
It is important to note that not all data types can be migrated from Raisers Edge to Salesforce NPSP. For example, Raisers Edge does not support recurring gifts, so this data type cannot be migrated. Additionally, some data may need to be reformatted during the migration process.  
  
Finally, it is important to note that Salesforce NPSP has certain data limitations and requirements. For example, Salesforce NPSP requires that all contact records have a unique identifier. Therefore, it is important to ensure that all contact records have a unique identifier before attempting to migrate them.

## 2.2: Data Sources

When migrating data and functionality from Raisers Edge to Salesforce Non-Profit Success Pack (NPSP), there are several sources of data that can be used. These sources include:  
  
1. Raisers Edge Database: The Raisers Edge database is the primary source of data for the migration. It contains all the data that has been collected in the Raisers Edge system and is the source of all the data that will be migrated to Salesforce.  
  
2. External Data Sources: If there is data that is not available in the Raisers Edge database, it can be imported from external sources such as spreadsheets, other databases, or web services. This data can then be used in conjunction with the Raisers Edge data to ensure a complete migration.  
  
3. Salesforce Data: If there is existing data in Salesforce that needs to be migrated, it can be used as part of the migration process. This data can be used to supplement the Raisers Edge data or to supplement the data from external sources.  
  
4. Migration Tool: The migration tool used to move the data from Raisers Edge to Salesforce can also be used as a source of data. The tool can be used to extract data from Raisers Edge and then map it to the appropriate objects and fields in Salesforce.  
  
When migrating data and functionality from Raisers Edge to Salesforce Non-Profit Success Pack, it is important to consider all of these sources of data and ensure that they are used appropriately. This will ensure that the migration is successful and that all the necessary data is included.

## 2.3: Data Preparation

1. Understand the data structure of your Raisers Edge database and how it is organized.  
2. Identify which data fields need to be migrated and which can be left behind.  
3. Clean up data in Raisers Edge to avoid importing duplicate or unnecessary information.  
4. Identify any data fields that need to be reformatted to fit the Salesforce format.  
5. Map the data fields from Raisers Edge to Salesforce NPSP.  
6. Create a plan for data migration, including the timeline and tasks.  
7. Create a backup of your Raisers Edge database before migrating.  
8. Test your data migration plan to ensure accuracy and completeness.  
9. Monitor the transfer process for any errors or discrepancies.  
10. Verify the accuracy of the data after migration.

# 3.0: Functionality Migration

## 3.1: Campaigns

Campaigns are one of the most important components of a successful fundraising strategy. In Raisers Edge, campaigns are used to organize and track fundraising activities, such as direct mail campaigns, special events, and online giving. In Salesforce NPSP, campaigns are used for the same purpose.  
  
When migrating campaigns from Raisers Edge to Salesforce NPSP, there are several important steps to take. First, it is important to create a plan of action for the migration. This plan should include a timeline and a list of tasks to complete. It should also include a strategy for how to handle any existing campaigns in Raisers Edge.  
  
Once the plan is in place, it is time to begin migrating the campaigns. This is done by first creating the campaigns in Salesforce NPSP, then mapping the data from Raisers Edge to the appropriate fields in Salesforce. This process should be done carefully, as any mistakes could result in data loss or incorrect data being imported into Salesforce.  
  
Finally, it is important to test the migration to ensure that the data has been correctly imported and that all campaigns are functioning correctly. This can be done by running test campaigns and verifying the results.  
  
Once the migration is complete, it is important to review the campaigns in Salesforce and make sure they are correctly configured and working as expected. This includes verifying that the campaigns are correctly linked to the appropriate contacts, accounts, and opportunities.  
  
By following these steps, organizations can successfully migrate their campaigns from Raisers Edge to Salesforce NPSP.

## 3.2: Events

Migrating Events from Raisers Edge to Salesforce NPSP requires some setup before any data can be brought over.  
  
First, you must create a new custom object in Salesforce to house your event information. This object should include fields such as Event Name, Event Date, Event Type, and Event Location. You should also create a custom tab in Salesforce to store the events.  
  
Next, you must decide how you want to map the data from Raisers Edge to the new Salesforce custom object. This will involve creating custom fields in Salesforce to store the data from Raisers Edge, such as the event name, date, type, and location.  
  
Once the fields have been created, you can begin the data migration process. You will need to export the event data from Raisers Edge into a CSV file. This file can then be imported into Salesforce using the Data Loader tool.  
  
Once the data has been imported, you can begin setting up the functionality for the events in Salesforce. This includes setting up event registration forms, creating event dashboards, and setting up automated email reminders for registered attendees.  
  
Finally, you will need to set up the reporting and analytics for the events in Salesforce. This will involve creating custom reports and dashboards to track event attendance, donations, and other metrics.  
  
By following these steps, you should be able to successfully migrate your events from Raisers Edge to Salesforce NPSP.

## 3.3: Constituents

Migrating constituent data from Raisers Edge to Salesforce NPSP is a complex process that requires careful planning and execution. The first step is to ensure that all constituent records in Raisers Edge are up-to-date, complete, and accurate. This includes verifying that all required fields are populated, and that any data that is not being migrated is marked as such.  
  
Once all the necessary data is verified, the next step is to export the data from Raisers Edge into a format that can be imported into Salesforce NPSP. Depending on the version of Raisers Edge you are using, you may need to use a third-party tool to convert the data into a format that is compatible with Salesforce NPSP.  
  
Once the data is in a compatible format, it can be imported into Salesforce NPSP using the Data Loader tool. The Data Loader tool allows users to map the fields from Raisers Edge to the fields in Salesforce NPSP, ensuring that the data is imported into the correct fields.  
  
Finally, it is important to verify that the data was imported correctly. This can be done by running a comparison report between the records in Raisers Edge and the records in Salesforce NPSP. This will ensure that all of the data was accurately imported and that no data was lost in the migration process.

# 4.0: Conclusion

Migrating from Raisers Edge to Salesforce Non-Profit Success Pack (NPSP) is a complex process that requires careful planning and consideration to ensure a successful transition. However, with the right guidance and resources, the process can be made easier and more efficient. The steps outlined in this book have provided a comprehensive overview of the migration process, from understanding the differences between the two systems to mapping data and functionality.  
  
The key to a successful migration is to ensure that the data is properly mapped and the functionality is working as expected. It is also important to ensure that the data is secure and that the system is compliant with all relevant regulations. Additionally, it is essential to have a clear plan and timeline for the migration process, as well as a team of experienced professionals to help guide the process.  
  
Finally, it is important to remember that the migration process is ongoing and requires ongoing maintenance to ensure that the data and functionality remain up to date. Regularly reviewing the system and making any necessary changes is essential to ensure that the data and functionality continue to be up to date and secure.  
  
Overall, migrating from Raisers Edge to Salesforce Non-Profit Success Pack (NPSP) is a complex process that requires careful planning and consideration to ensure a successful transition. However, with the right guidance and resources, the process can be made easier and more efficient.