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The DIY Companion to Household Account Migration

Can you do this migration? Yes, with preparation! This guide shares essential steps. With Nonprofit Starter Pack version 3.0 (NPSP 3), Salesforce introduced the Household Account model. You'll have the option to migrate after upgrading, and we encourage you to consider it. This model provides many benefits for nonprofits hoping to streamline their data. This guide is supportive to one that can be found on the Power of Us Hub: "Convert to the Nonprofit Success Pack Household Account Model." The Hub guide is longer and provides comprehensive information on migration. We recommend using these resources in concurrence, as this resource will help you navigate the larger trek provided by the Hub guide.

Account models are the structure for how individual contacts in your database are organized. The Household Account model is a more seamless way to organize contacts and data associated with them. You can connect multiple members of the same family while tracking their separate donations and addresses (including seasonal addresses). This model more closely follows the existing data structure of Salesforce, allowing for more consistency in your database and better reporting.

Moving Forward Mindfully

We recommend that you set aside time and energy to do this work. Migrating to the Household Account Model cannot be done in one sitting or in spare moments between projects. It will need your undivided attention for a few days or more, depending on your organization's data. Communication with other users of Salesforce is essential in this migration. We know that you likely wear many hats within your nonprofit, so it's a good idea to discuss this process with your team before starting. Share why the migration matters, how it will support their work, and why you need time and space to focus on this process. Encourage them to ask questions before you get started, so you can move forward with confidence.

When you're ready to get started, please settle into your work area and take a deep breath in and out. The beginning of a trek is often a mix of eagerness, excitement, and maybe some anxiety. That's okay. **Just breathe it in and breathe it out, and we'll begin…**

Get Your Data Ready: A Checklist

Before moving data around, let's fix issues that could be potential problems with the conversion. Create reports for the following and fix issues as noted. Consider referencing the Hub guide for more details on how to complete this checklist. **Note:** We use "donation" and "opportunity" interchangeably. The opportunity is the donation itself.

Item	What to Check	Hub Guide Page Reference	Done?
Households with no contacts	Every household should have at least one contact.	18	
One to one account without household	Every one to one account must be in a household. Ensure all the address details on **all** the accounts are *EXACTLY* the same (all the way to the zip code and the number of digits)	23	
More than one contact role marked as primary on a donation	Make sure the contact role has only one contact marked as primary on any donation. Create an Opportunities with Contact Roles report. Every one to one opportunity must have at least one contact role marked as primary with the Role of Donor.	20	
Opportunity	Ensure every One to one opportunity (meaning the opportunity is from a one to one account) has at least one contact role.	20	
Total Gifts Match	Create a report that shows you the total gifts on the one to one account and the total gifts on the contact itself. These should be equal in all cases; if not, then see why there is one working and the other not working (likely related to contact roles being inaccurate).	20	
One to one account	All one to one accounts should have *at least one* contact.	18	
Inactive Users	Find any Opportunities, Contacts, Accounts or Activities owned by inactive users (users who are no longer active in your Salesforce instance) and move those to active users.	21	

Contacts with One to One Account	If you are using the one to one model, ensure every contact is associated with a One to One Account (check the Primary Contact field on the Account and make sure it contains a contact).	18	
Verify SYSTEM Account	For the one to one model, if you are not sure your data was correctly entered, check the _System:AccountType and _System:IsIndividual fields. For an actual one to one account, the AccountType should be "One-to-One Individual" and IsIndividual should be checked. If an actual Account (not a one to one account) make sure the Account Type is left empty and the IsIndivdual is NOT checked.	19	
Verify Contact is an Organization OR Household, not both	If a contact is in a household, they should not also be in an organization, but instead should be in their own 1 to 1 account. Create a contact and account report where Household is not empty and Account is not a Household. Clean it up so that all the Contacts are either in an Organization OR a Household. Not both.	15	

Get Your Sandbox Ready

Sandboxes let you play with your data, try out the account model, and work out bugs and challenges before making the changes part of your actual, production database. It's also a safe spot to work on the data away from team members who may be accessing the database. You can work with all of your data in a sandbox, or if you prefer, you can port over just a portion of your data. Some organizations with large databases may choose to focus on only one audience, such as volunteers, for their sandbox. We recommend using Apsona for its financial practicality as well as flexibility with interim testing of data. **For more tips on which type of Sandbox is best for you, visit page 24 of the** Hub guide**.**

Here are options for sandboxes, from least to most expensive:

Sandbox	How to Get	Price
Apsona or Data Loader – A basic tool. Remember to import the SF ID from production into the Sandbox as an External ID and use it to link up the data.	http://www.apsona.com	Free for some organizations. Check website for details.
TalenD – A slightly more complex tool.	www.talend.com	Free
Full Sandbox	Contact your Account Executive.	Three-month pricing

What goes in the sandbox?

- Accounts
- Contacts
- Activities
- Opportunities
- Households

Note: a Developer Pro Sandbox allows for 1 GB of data, so ensure you capture only the data you need before you migrate to the Developer Pro Sandbox. You can check how much data each of your objects takes: Setup -> Data Management -> Storage Usage.

Migrate Data to the Sandbox: A Step-by-Step Checklist

This checklist will be helpful if you use Apsona or Dataloader. Whatever sandbox you choose, **data cleanup is essential.** Depending on the health of your data and size of your database, it may also be time-intensive. Take notes and leave time for this step.

Step	Task	Done?
1	Account Object • Create an External Account ID field • Create an Old Household ID field (will be used in the migration process – only use if there are fields on the household object that need to be migrated to the newly created household account)	
2	Contact Object • Create an External Contact ID field • Create an External Account ID field • Create an External Household ID field	
3	Household Object – Create an External Household ID field	
4	Opportunity Object • Create an External Opportunity ID field • Create an External Campaign ID field	
5	Payment Object (if used) – Create an External Opportunity ID field	
6	Import Households first	
7	Import Contacts into the correct households, however, let the Account be automatically created	
8	Import Accounts	

9	NOW, update the Contacts you just imported to point to the just imported Account (the Accounts that were automatically created will vanish)	
10	Import Campaigns	
11	Import the Opportunities	
12	If using Payments, import after Opportunities	
13	Import the Opportunity Contact Role (both Primary checkbox and the Contact ID). Make sure Opportunity ID and Contact ID link to correct Opportunity and Contact.	
14	Run reports to ensure data came over correctly (check production vs. sandbox)	

Customized Households?

New household accounts will be created from the Household object. The custom fields you created on the Household object will **NOT** be automatically transferred over to the new Household Account created from the conversion. If you have Household customization, then you will want to create a field for the old household ID so that you are able to customize the Household Account and then manually migrate the data from the Household object into the Household Account.

> **Moving Forward Mindfully**
>
> Before migrating to production, ensure you have plenty of time and attention set aside. It could take multiple passes and possibly multiple days. It's important that the migration occur during a time when you are free to do this work for a few days, and not when you have a lot of other things to accomplish. So, if summer is a down time for you, find a few days and block them off for this work. Be ready to offer this your full attention and that you take lots of notes during the sandbox migration.

Prepare to Migrate to Production

Migration in the sandbox with data will help you to ensure the data is accurately entered into the system and that data is converted correctly. However, there are a few things that may not be issues in your sandbox, but may be issues in production. Here are items to consider before you migrate in your production instance:

1. Ensure that no one is logged into your instance.
2. If you have any integration from external systems that writes data into your instance, **turn off that integration.** Every integration is different in how they are turned off. If you are wondering how to do it, either contact your vendor or post your question on the Power of Us Hub.
3. Workflows and validation rules that would prevent creation of an Account or Opportunity should be disabled.
4. Disable dupe blocker or the native duplicate management features.

Conversion can be a difficult process; **there are more tips on page 26 of the guide housed on the [Hub](#) to ensure this goes as smoothly as possible.**

Clean Up After Migration

Reference page 31 of the [Hub guide](#), where post-conversion tasks will leave you with a mess-free migration.

It's likely that you will need to **rewrite reports** that relied on the older Account model (either individual or one-to-one). Look for reports that use the household object or rely on the one-to-one account details. It may also be necessary to revise some **validation rules or workflow rules**. These may run against the household object, which no longer exists.

Document and Celebrate!

When you have gotten over this mountain, be sure to share the results with your team and with the community on the Power of Us Hub. We also invite you to send us your notes so we can continue to grow this resource. We'll add you to credits (unless you wish to remain anonymous)!

Credits

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