



Upgrading to DonorSearch 360+

Your Migration Guide from DonorSearch 360io

Everything you need to know to make the switch — quickly and confidently.

Welcome to DonorSearch 360+

We're excited to introduce DonorSearch 360+ — a completely reimagined version of the DonorSearch Salesforce integration you rely on every day. Built from the ground up with your fundraising team in mind, 360+ delivers a faster, smarter, and more powerful experience inside Salesforce.

This guide will walk you through everything you need to know about the upgrade: what's new, what to expect during migration, and how to get up and running quickly. Your existing screening data will carry over automatically using our built-in Migration Wizard, so there's no risk of losing your history.

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What's New in DonorSearch 360+

DonorSearch 360+ includes significant improvements across every area of the application. Here's a quick look at what's changed:

A Redesigned, User-First Interface

- A centralized, graphical widget that puts your most important donor data front and center
- All six AI scores displayed prominently on every record
- Helpful tooltips and descriptions built into every widget and page
- A cleaner, updated Detail View for each donor profile

Dramatically Enhanced Batch Screening

- Removed the 50,000-record-per-batch limitation — now screen 1 million+ records using Salesforce Reports
- No longer reliant on Campaigns for batch screening
- Schedule recurring screenings against any saved report on your own cadence
- Improved batch dashboard with detailed error reporting and controls (View Errors, Cancel, Delete)
- Simple “re-pull” to refresh AI scores without re-screening

Profile History & Delta Tracking

- Track how a donor's wealth indicators and scores change over time
- Graphical and reportable change data on each profile (when enabled by your admin)
- Compare current and historical screening results side by side

Advanced Field Mapping

- A completely redesigned, visual field mapping interface
- 20 custom pass-through fields for advanced data integration
- Separate mapping configurations for Contacts, Leads, and Person Accounts

Feature Comparison at a Glance

Feature	DonorSearch 360io (Legacy)	DonorSearch 360+ (New)
Batch Screening Limit	50,000 records/batch (Campaign-based)	1M+ records via Reports; no Campaign required
Field Mapping Interface	Basic custom settings	Visual mapper with 20 custom pass-through fields
AI Score Display	Limited	Front-and-center with all 6 AI scores
Profile History / Delta Tracking	Not available	Track score & wealth changes over time
Scheduled Screenings	Limited	Schedule recurring screenings via saved reports
Error Reporting	Limited	Detailed error logs, cancel & delete job controls
Person Account Support	Supported	Fully supported with improved mapping

The Migration Process

Migrating from 360io to 360+ is designed to be straightforward. The new application includes a built-in Migration Wizard that handles data conversion automatically — your Salesforce Administrator can run it in minutes.

Your Data Is Safe

Your existing DonorSearch screening data, donor profiles, and field mapping configuration will all migrate automatically. The migration is safe to re-run, so there is no risk of data loss or duplication.

What Gets Migrated

- All Contact, Lead, and Person Account screening profiles
- DS Ratings (automatically converted to the new format)
- Estimated Capacity, AI scores, wealth indicators, and giving history
- Your existing field mapping configuration

A Note on Legacy Fields

A small number of legacy fields from the old package (individual political giving breakdowns, targeting fields, and a few internal fields) do not have equivalents in the new package and will not be migrated. Political giving totals are preserved as combined figures. Contact support if you have questions about specific fields.

Migration Steps for Your Salesforce Administrator

The steps below should be completed by a Salesforce Administrator with the DonorSearch Admin permission set assigned.

- 1 Install DonorSearch 360+** Install the new package from the Salesforce AppExchange or using the link provided by your DonorSearch representative. Both the old and new packages can coexist in your org during migration — no downtime required.
- 2 Complete Initial Configuration** Add the DonorSearch Rating Widget and Profile object to your record page layouts, assign permission sets to your users, and enter your API key in DonorSearch Settings. (See the separate Installation Guide for detailed steps.)
- 3 Open the Migration Wizard** Navigate to DonorSearch Settings → scroll to the “Migrate from Old Package” section and expand it. The system will automatically detect your old package and display a record count preview before anything is run.
- 4 Select What to Migrate** Check the boxes for the record types you want to migrate: Contact profiles, Lead profiles, Person Account profiles, and/or Field Mappings. You can migrate all at once or in stages.
- 5 Run & Monitor the Migration** Click “Start Migration.” A live progress bar will show records processed, records failed, and current status for each object type. Large orgs may take several minutes.
- 6 Review Results & Validate** Once complete, review the migration summary. Spot-check a sample of migrated DonorSearch Profiles against your original records to confirm data accuracy.
- 7 Uninstall the Old Package** When you’re satisfied with the migration, the old DonorSearch 360io package can be safely uninstalled from your Salesforce org.

Safe to Re-Run

The Migration Wizard is idempotent — meaning it can be safely re-run at any time without creating duplicates. Records that have already been migrated are automatically detected and skipped.

Before You Migrate: Prerequisites

Please confirm the following before your Salesforce Administrator begins the migration:

- DonorSearch 360io is currently installed in your Salesforce org
- Your organization has an active DonorSearch subscription
- You have your DonorSearch API Key available (contact support@donorsearch.net if needed)
- At least one user has the DonorSearch Admin permission set assigned
- You have reviewed and downloaded the DonorSearch 360+ Installation Guide

Frequently Asked Questions

Will my existing screening data be lost during the migration?

No. The Migration Wizard transfers all of your existing Contact, Lead, and Person Account profiles to the new package automatically. Your data is preserved.

Do I need to stop using DonorSearch during the migration?

No. Both packages can be installed in your Salesforce org at the same time. Your team can continue using the old package normally while your administrator runs the migration in the background.

How long does the migration take?

For most organizations, the Migration Wizard completes in a few minutes. Larger orgs with tens of thousands of profiles may take 15–30 minutes. Your administrator can monitor live progress in the wizard.

What if the migration fails or produces errors?

The wizard is safe to re-run — it will skip already-migrated records and only process what remains. Your administrator can review error details in the migration summary. Our support team is available to assist if issues persist.

Will my field mapping configuration carry over?

Yes. The migration wizard includes an option to migrate your existing field mapping configuration to the new format. We recommend reviewing your mappings in the Settings Manager after migration to confirm everything looks correct.

What happens to my DS Ratings?

DS Rating values are automatically converted from the old text format (e.g., “DS 1-1”) to the new picklist format (e.g., “DS1-1”). No data is lost in this conversion.

Can I uninstall the old package right away?

We recommend waiting until you’ve reviewed the migration results and confirmed your data looks correct before uninstalling the old package. Once you’re satisfied, it can be safely removed from your org.

What if I need help during the migration?

Our support team is available to assist. Reach us at support@donorsearch.net or visit www.donorsearch.net. Clients with complex configurations can request a dedicated migration session with our team.

We’re Here to Help

If you have any questions at any point during the migration process, our team is ready to assist. We want to make this transition as smooth as possible for your organization.

Email Support: clientsupport@donorsearch.net

Website & Help Center: www.donorsearch.net

Thank you for being a DonorSearch client. We’re confident DonorSearch 360+ will make your team more efficient and your fundraising more effective. We look forward to supporting you through this upgrade.