

Case Study

A Nonprofit Single Parents Organization Migrates to Salesforce



The Customer

The customer is a US-based nonprofit organization providing housing and financial education programs for single parents. The customer sought to update their toolset for managing donations and members' requests using Salesforce Nonprofit Success Pack (NPSP). Data migration from the existed organization's system to Salesforce, which we performed, was a part of that update process.

Salesforce supports nonprofits and provides a special product for them—Salesforce Nonprofit Cloud. The core of the Cloud is called Nonprofit Success Pack. It is a collection of preconfigured components to manage fundraising, engage donors, connect with volunteers and clients in one place. NPSP is free and open-source. Nonprofits can [download](#) it from Salesforce AppExchange.

What we did to accomplish our customer's goal

To accomplish data migration, we completed the following tasks:

- installed the Nonprofit Success Pack;
- made changes in data models including the setup of custom fields, statuses, support process, record types, page layouts;
- reviewed, cleaned, and transformed data into NPSP's format;
- mapped additional fields for supported data objects;
- imported data;
- configured the security for community members through the use of profiles, permission sets, field-level security settings;
- integrated Formstack, workplace productivity software for implementing custom lead forms, working with online documents

The results

When all the works were completed, the organization got a more structured and organized storage of various types of data enabling the community managers to get a single view of a member. Implementation of custom web forms simplified the donation process and allowed the organization to work more effectively with leads and communication.

The single parents community got an opportunity to manage their nonprofit business processes in a more advanced way.



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