Migrate from Raiser's Edge to Salesforce – NOW

You may have read many comparative articles on Raiser's Edge (RE) and Salesforce NPSP. We know that though RE is moving to cloud with Raiser's Edge NXT, there are areas that make users choose Salesforce over RE.

Salesforce has consolidated packages that allow for updates to be seamlessly pushed, without help from a consultant. Also, Salesforce has a strong community through the Power of Us Hub, that provides answers to your issues and insightful suggestions Salesforce also has an edge in domains such as program management, marketing, and reporting and analytics tools for nonprofits. Cloud gets access to data to better understand the brands' effectiveness on social network, and manage and track audiences at scale.

On the other hand, what was assumed to be Raiser's Edge strength can become a problem in migration. To provide support for nonprofit operations, RE does not need third-party integrations or detailed customizations. It was designed to be very flexible in terms of attributes and mailing preferences. This allowed users to configure their systems uniquely, which in turn does not support automation during data conversion.

This brings us to the most important challenges in transitioning from RE to Salesforce.

Data Mapping

The data objects that get migrated are:

Raiser's Edge	Salesforce	Notes
Constituents key indicator= O for organization	Accounts	Key Indicator' must be imported for each exported spreadsheet
Constituents key indicator= I for Individual	Contacts	'Key Indicator' must be imported for each exported spreadsheet
Events/ Appeals/ Campaigns	Campaigns	Study the relationship structuring. Campaigns in RE are available as RE_Campain object, which can be downloaded and imported.
Relations	Relationships – for Contacts Affiliations – for Accounts	Map accordingly
Gifts	Opportunities	Type: Cash
Gifts	Payments	Type: Pledge Pay Cash/ Pledge Pay Stock/ Pledge Pay Sold Stock/ WriteOff
Installment Payments Type: Pledge Pay Cash/ Pledge Pay Stock/ Pledge Pay Sold Stock/ WriteOff	Payments	If Type=WriteOff ->'Written Off' checkbox checked in Salesforce

Actions	Activities	Type: Pledge Pay Cash/ Pledge Pay Stock/ Pledge Pay Sold Stock/ WriteOff
Media	Notes	If Type=WriteOff ->'Written Off' checkbox checked in Salesforce
Constituency Notes Contact / Donation	Notes	Note 'Title' is not mandatory in RE, but is in Salesforce

Analyze

'Spouse' is created as a 'Contact' in Salesforce and added in the same 'Household'. 'Household' record is created for 'Spouse' in the same 'Household'. Households can be created automatically for every Constituent. Relationship between 'Spouse' and 'Constituent' is created.

Migration may result in creation of 'Anonymous Households', when no contact is associated with the constituent account level record. This would need cleaning after the migration.

'Tributes' in RE can be added as custom fields on 'Opportunities'. Tribute can be treated as Gifts '+'record – 'Gifts' fields and a few additional fields. It might hence be easier to migrate 'Tributes' records after all the'Gifts' records have been transferred.

'Attributes' can be added as custom fields for 'Contact', 'Donation' and 'Fund' objects.

RE uses 'Fund Records' to store details about financial side of events i.e. the purpose a donation is meant to fund.

In a nutshell, anything that can be reported in a tabular format can be pulled from RE to Salesforce.

Data Migration

Before proceeding with the actual migration, it is advisable to validate the mappings by running a test batch.

In a nutshell, anything that can be reported in a tabular format can be pulled from RE to Salesforce.

It's easy to extract details about individuals and organizations from a system and move these records to a new platform. The complex part is ensuring that all the linked data and relationships are captured and preserved in the new CRM system. Also, you do not want to be stuck with wrong data import or poor classification.

'Tributes' in RE can be added as custom fields on 'Opportunities'. Tribute can be treated as Gifts '+'record – 'Gifts' fields and a few additional fields. It might hence be easier to migrate 'Tributes' records after all the'Gifts' records have been transferred.

All the metadata and sample set of data from Raiser's Edge is prepared where each table is its own CSV file. The mapping instructions need to be created for each table and filed. This helps in reviewing and modifying the field mapping. During the final import, ensure no editing or creating of new records is in place in Raiser's Edge. After the final transformation, what remains is cleaning messy data and merging duplicates.

If you have the Non Profit Starter Pack (NPSP) installed in a Developer/ Enterprise/ Unlimited Edition, rest can be taken care of. Now it is your choice whether you want to build on NPSP or design a completely new interface.