



Convert to the Nonprofit Success Pack Household Account Model



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Introduction—Read This First!

If you're reading this, you've likely already upgraded to the Nonprofit Success Pack (NPSP) from NPSP2 (formerly known as the Nonprofit Starter Pack). You may even already be enjoying the benefits of automatic push upgrades, improved code, GAU Allocations, Engagement Plans and much, much more. But, upgrading was just the first step...

Because when you upgrade to the Nonprofit Success Pack, you're introduced to a new way of configuring your Contacts, Accounts, and Households. And that new way is called the Household Account Model. In this guide, we'll:

- Explain what the Household Account Model is
- Compare the Household Account Model to the One-to-One Individual or Individual Bucket Models, and outline why you might consider switching
- Walk you through the conversion tasks

But let's face it, every nonprofit uses NPSP a little differently. Since we don't know exactly how you're using NPSP or how you've customized it, it's impossible to provide an exact step-by-step guide to conversion as we did in [Upgrade to Nonprofit Success Pack from a Previous Version of NPSP](#). And we have to warn you. This is a complex and time-consuming process that requires intimate knowledge of Salesforce, NPSP, and your data. And we can't stress this enough: **Converting your data to the Household Account model is not a decision you should take lightly if you've been using Salesforce for a while or have a large amount of data or customizations.**

While we've provided some tools to make the conversion easier, it will still require an investment of time and far more advanced administrator skills than the upgrade from NPSP2 alone. If this is something that feels daunting to you, please reach out to a Salesforce partner for assistance. There are plenty of partners that have experience with this conversion and can ensure that your project is successful and stress-free.



Thank you

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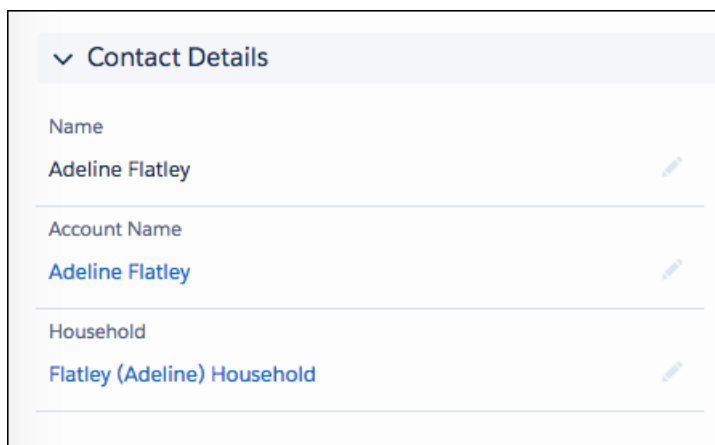
All About Account Models

Before you convert, let's talk a bit about the Household Account Model.

A History of Account Models

Salesforce was originally designed as a business-to-business (B2B) application that companies use to manage sales. Therefore, the standard Salesforce Account model requires that each Contact be associated with an Account.

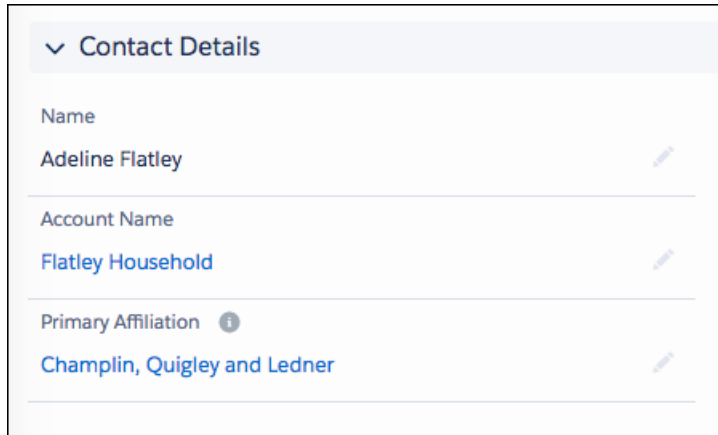
Since most nonprofits don't operate like B2B companies, NPSP 2 introduced the One-to-One Individual model. This model automatically created a shadow Account that matched the Contact, and created a separate custom object called a Household.



The screenshot shows a 'Contact Details' section in Salesforce. It contains three rows of information, each with a label on the left and a value on the right, followed by a small edit icon (pencil). The first row is 'Name' with the value 'Adeline Flatley'. The second row is 'Account Name' with the value 'Adeline Flatley'. The third row is 'Household' with the value 'Flatley (Adeline) Household'.

▼ Contact Details	
Name	Adeline Flatley
Account Name	Adeline Flatley
Household	Flatley (Adeline) Household

Then, along came the Nonprofit Success Pack, and with it the Household Account Model. This model aligns much more closely with Salesforce's standard Account model, in that all Contacts must have an Account. But in this model, the Household is the Account, and Contacts and Opportunities are associated with the Household.



▼ Contact Details

Name
Adeline Flatley

Account Name
Flatley Household

Primary Affiliation ⓘ
Champlin, Quigley and Ledner

You can learn more about the different Account models in [What is the Household Account Model?](#)

About the Household Account Model

The Household Account Model is the default Account model for the Nonprofit Success Pack and the one that Salesforce.org recommends you use.

When you create a new Contact, an associated Household Account is automatically created. This Account Model also includes Affiliations, which connect Contacts to Organizations, so nonprofits no longer have to decide whether or not a Contact's Account should be their One-to-One Account or a Business Account. Both Accounts are supported directly on the Contact record!

Think of it this way. In Nonprofit Success Pack, the recommended model is:

- **A Contact's Account is where they live.** You should have a Household Account for every Contact, even if the Contact's only relationship with you is through their workplace. When that business-only Contact becomes a donor or supporter later, you won't have to make any changes to their Contact record to accommodate the dual relationship.
- **A Contact's Primary Affiliation is where they work.**

In addition, since the Household Account Model is much more closely aligned with the standard Salesforce Account model, navigating the object relationships and reporting between Contacts, Household Accounts, and Donations is much easier.

Is there anything in NPSP that requires you to use the Household Account model in exactly this way? No. That's the beauty of NPSP. You are free to configure your instance to make it work best for your organization. However, there are some features that only work with the recommended configuration. Let's take a look.

Features Only Available in the Household Account Model

As of version 3.111 (October 2017), those features include:

- **Address Management**—You can track multiple addresses for each Household Account you create. (seasonal, work, home, or other addresses you'd like to track for mailings). For each address, you specify the type and if it is the default for the Household or Organization.
- **Customizable Rollups**—Create highly customized rollups that roll up data from either Opportunities, Payments, or Soft Credits (including Partial Soft Credits). Additionally, when you enable Customizable Rollups, all of your existing NPSP legacy rollups and any User Defined Rollups are automatically converted into Customizable Rollups so that you can update them as needed. Customizable Rollups are available in NPSP version 3.130 and later.
- **NPSP Data Import Utility**—Use the NPSP Data Import utility to prepare a spreadsheet of Contacts, Households, Campaigns, and Donations and import them to Salesforce in just a few clicks. To find out more, check out this [step-by-step guide](#).

Can I Stick With the One-to-One Model?

The Household Account model is the default for new organizations and offers considerable improvements over the One-to-One model, but there are valid reasons for sticking with the One-to-One or Individual models.

- Your organization is using Salesforce effectively and you have a great deal of customization.
- You don't deal with Households and have no need for the additional features mentioned above. (That said, if even one Contact at a corporation makes a personal gift to your organization, you should consider using Households to keep their personal interaction with your organization separate from their business interactions.)
- You're not ready to do this on your own, and a Partner isn't an option (for financial or other reasons).

If you decide not to switch, you can still use NPSP effectively! We promise. It's important to note that while you may miss out on some functionality if you don't switch to the Household Account Model, new releases of NPSP won't break existing functionality.

You may want to check with the developers of any third party applications you use regarding their compatibility with older NPSP data models. At this point, most third party vendors assume their NPSP customers are using the Household Account model.

The Logistics

Now that we've learned about Account Models, it's time to get to the logistics. You may be wondering how the conversion tool works, how long the process takes, or whether it would be best to hire an expert to do the work for you. We'll provide some answers in the following sections.

How Long Should This Take?

Running the Conversion Utility takes anywhere from 10 minutes to several hours depending on the amount of data in your instance. Keep in mind that you'll need to schedule the conversion during a time when it's ok for users to be locked out of Production and you can turn off external systems that integrate with your instance such as Soapbox Engage, Form Assembly, or Click & Pledge. Consider any fundraising deadlines, meetings, or events when you plan your conversion in Production.

But running the Conversion Utility is the least time-consuming part of this job. Getting your data into shape, testing conversion in Sandbox, and making corrections to your data in Production can take **several months**. Allow plenty of time to prepare so that you aren't rushed.

If you are overwhelmed by this process, consider talking to a partner. This is a big data conversion, and should not be undertaken lightly. **There is no undo button that will restore your org once it has been converted. You would have to restore from a backup, which is painful and time consuming.**

Prerequisites

Before attempting any of the steps in this guide, you should have the following prerequisites and knowledge:

- Strong to advanced Salesforce Administrator skills, such as the skills necessary to pass the Salesforce Certified Administrator credential.
- Extreme familiarity with your org's customizations and data.
- Plenty of experience using data manipulation tools such as Excel, Data Loader, Apsona, or DemandTools to import, export, and update records.

- Ability to evaluate and troubleshoot issues with profiles, record types, page layouts, workflows, validation rules, and any third-party applications that push data into your Salesforce instance.
- Full understanding of your legacy data model (whether that is One-to-One Individual or Bucket Individual) and how it differs from the new Household Account Model.
- To use the Conversion Utility, you must have the Customize Application, Modify All Data, and Author Apex system permissions.

Using a Partner

If you don't meet the qualifications listed in the prerequisite section, or any of the information provided up to this point makes you nervous, consider hiring a partner.

There are many [Salesforce partners](#) who have experience converting to the Household Account Model. Why not take advantage of their knowledge and expertise?

RECOMMENDATION: Before you choose a partner, do your homework. Ask how many conversions they've performed. Find out if they've done any conversions for orgs that are similar in size and scope to yours.

What Is Involved in the Conversion?

Curious about what conversion actually entails? Here are the high level steps one would need to complete to successfully convert to the Household Account Model:

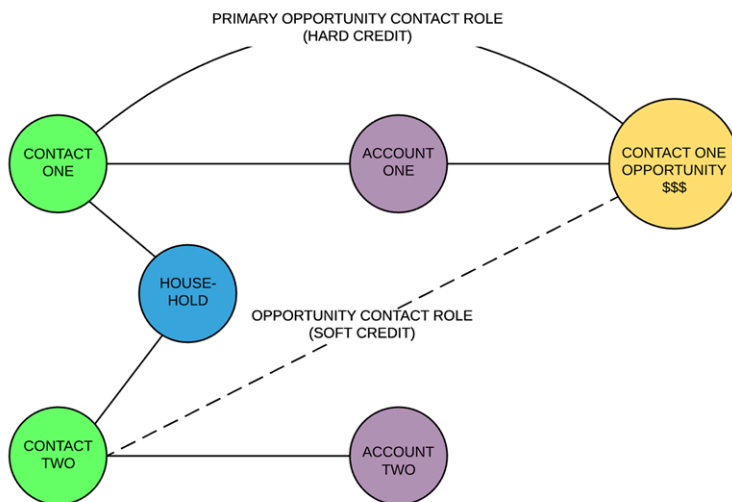
- Disable all NPSP triggers, including any custom triggers you may have created. *
- Export all existing Households, along with their Contacts, as that's the data you'll be working with.
- Create new Household Accounts for each existing Household.
- For any Contact with an Organization Account that also has a Household record, replace the Account Name with a Household Account and update the Organization to be its Primary Affiliation instead.
- Remove Contacts from Individual or One-to-One Accounts, and add them to the newly-created Household Accounts.
- Move Opportunities from the Individual or One-to-One Accounts to the new Household Accounts and Contacts.
- Move Activities and Tasks from the Individual or One-to-One Accounts to the new Household Accounts.

- Map Addresses from your existing Households and Contacts to the new Address object, then attach them to the new Contacts and Household Accounts.
- If there was no Address on the Household, but each Contact has an Address and they're different, decide the Household Account's Default Address based on either the Address that appears in the most Contacts or is associated with the Contact with the most Opportunities.
- Set Address Overrides for any Contact whose address differs from their Household Account.
- Select a Primary Contact for each Household Account.
- Re-enable NPSP Triggers, including your custom triggers. *

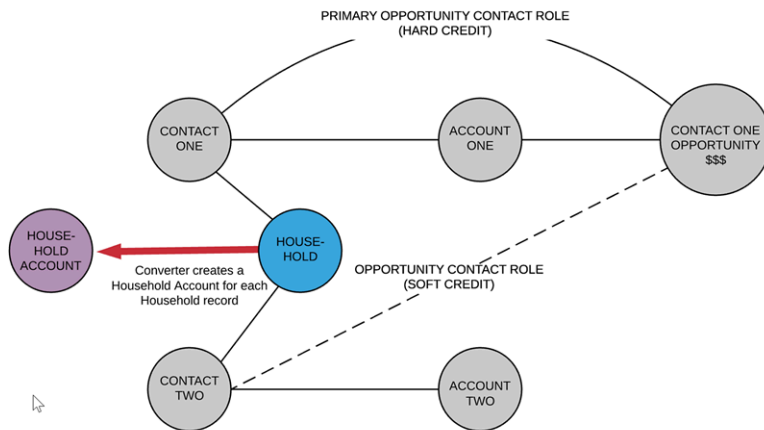
Sound scary and daunting? Fret not! We have a Conversion Utility that performs these steps (Caveat: There are a few you'll have to do on your own. They are indicated with an asterisk (*)). The rest of this guide outlines what you need to do pre- and post-conversion, and shows you how to run the Conversion Utility.

And for all you visual learners out there, here is a five step visual representation of the conversion process.

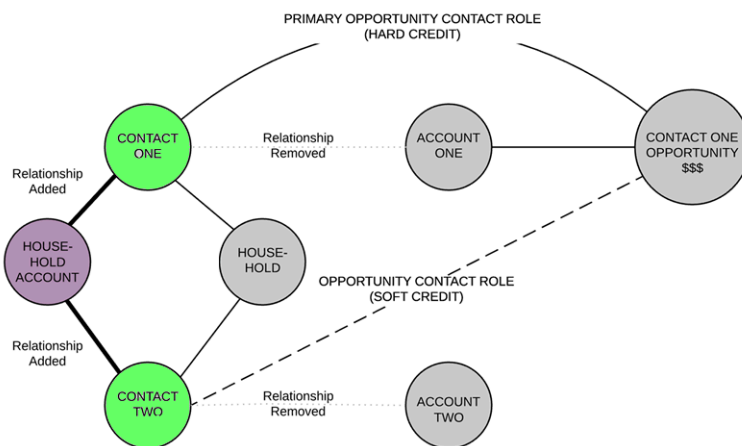
1. This is what an NPSP 2 One-to-One Household looks like prior to conversion.



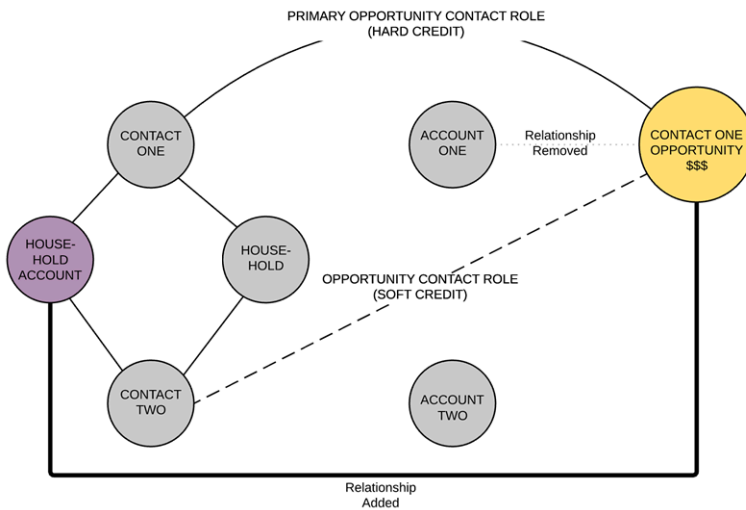
- The Conversion Utility creates a new Household Account for each Household record.



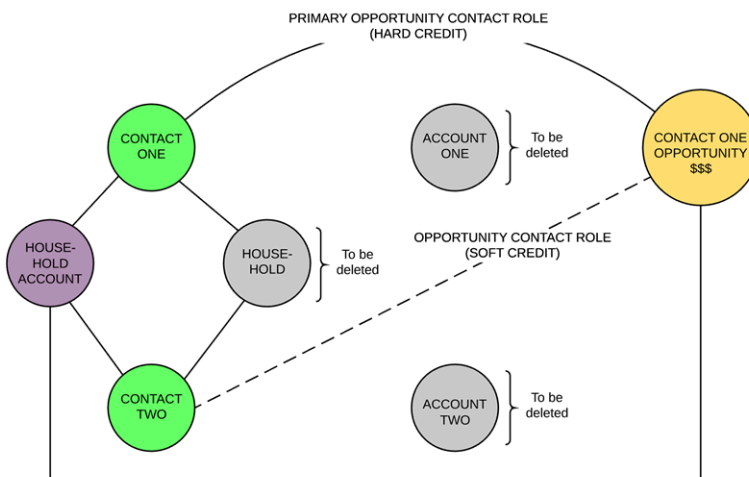
- The Conversion Utility disconnects Contacts from old Accounts and moves them to the new Household Account.



- The Conversion Utility disconnects an Opportunity from the old One-to-One Account and moves it to the new Household Account.



- This is what the Nonprofit Success Pack Household Account model looks after conversion.



What the Conversion Utility DOES NOT Do

Of course there are some things that the Conversion Utility doesn't take care of. These are things that you'll need to do manually either before or after running the Conversion Utility.

- Back up your data
- Create Household Accounts for Contacts that don't have an NPSP Household
- Convert Opportunities, Tasks, Activities, and Contacts owned by inactive users

- Move any data on objects that are directly related to the One-to-One Account or Household (except Opportunities or Tasks/Activities)
- Move any data from custom fields on the Household object to the new Household Account
- Move any data from custom fields on the One-to-One Account to the new Household Account, including non-NPSP managed packages
- "Fuzzy match" on Contact or Household addresses (for example, the Conversion Utility identifies 123 Main Street as a different address than 123 Main St.)
- Delete One-to-One Accounts or Household object records post-conversion
- Delete or hide any deprecated fields and tabs
- Deactivate (or re-activate) existing workflow rules and validation rules. These should be deactivated prior to running the Conversion Utility.

Conversion Process At a Glance

We know you're probably thinking "Ok, great. I understand what the conversion entails, but what do I actually need to do to complete this process in my org?"

At a high level, there is some pre-conversion work, the running of the Conversion Utility, and some post-conversion tasks and verification. The sections that follow walk you through all of those tasks.

But it's important to understand that you'll do some of the tasks in Production orgs only and some in both Sandbox and Production orgs. Here is the flow:

1. Complete all the [Pre-Conversion steps](#) in your Production org.
2. When your Production data is cleaned up, create a Sandbox org that includes that data.
3. Complete all the [Conversion steps](#), including running the Conversion Utility, in your Sandbox org.
4. Complete all the [Post-Conversion steps](#) in your Sandbox org.
5. When you've successfully converted the Household Account Model and adjusted your Production data to correct any errors you found in your Sandbox org testing, complete the Conversion and Post-Conversion steps in your Production org. Keep in mind that you'll want to lock your users out while you complete this part of the process.

Perform Pre-Conversion Tasks

To ensure that the Conversion Utility can run successfully, you need to perform some pre-conversion tasks in your Production org.

Audit Everything

As we mentioned above, the Conversion Utility touches every Contact, Account, and Household in your instance, and most (if not all) of your Opportunities and Tasks. To ensure that the process goes smoothly, you need to disable automation and third-party apps that push data into Salesforce or create records. Additionally, you'll need to disable validation rules or field requirements that prevent the Conversion Utility from creating new Accounts or reparenting Contacts, Opportunities, and Tasks.

The first step to ensuring a successful conversion is to audit your instance and make a list of the following items, so that you can easily disable them when the time comes:

- Custom triggers
- Workflow rules, processes, flows, and validation rules
- Scheduled Jobs
- Data.com matching rules or other duplicate management tools
- Required field restrictions (no need to document if it's only required on page layout)
- Non-NPSP apps such as Rollup Helper, Declarative Lookup Rollup Summaries (DLRS), fundraising, event management, online forms, or email applications that process activity or pull/push data in real-time.
- Accounting packages that may lock records from editing

Create a Post-Conversion Plan

Even though the Conversion Utility doesn't touch things like reports and dashboards, you may still need to adjust these and other items post-conversion. In your conversion planning, be sure to account for the time these adjustments will take. It could be significant. And, it will likely take place after your users are already back in Salesforce, so be sure to let your users know (and ask for their patience.)

Make a list of the following items from your org, in case you need to adjust them post-conversion. In particular, note which of the following touch either the One-to-One Account or the Household custom object:

- Reports
- Dashboards
- Email templates
- Mail Merge templates (Apsona, DrawLoop, Conga, etc.)
- Custom formula fields on Contact

Also, inventory the following in case you need to migrate data or recreate formulas:

- Custom fields on NPSP2 Households
- Custom fields on One-to-One Accounts
- Any custom object that relates to Household (i.e. address management packages)
- Any custom object that relates to One-to-One Accounts (i.e. accounting packages)
- Cases connected to a One-to-one Account (these need to be reparented after conversion)

**Note**

If you have data in custom fields on One-to-One Accounts, consider migrating that data to the Contact. This way, when you convert to the Household Account model (with potentially multiple Contacts per Household), you'll know which Contact that data pertains to.

Spring-Clean Your Data

Next, you must have a solid understanding of your organization's data. You need to identify and fix areas where you have problematic data that might cause the conversion to fail or have incorrect or unexpected results. In each of the following sections, you'll find suggestions for how to find problematic data, and how to fix it so that your conversion is a success.

- [Contacts Without an NPSP Household](#)
- [Households Without Contacts](#)
- [Improperly Configured One-to-One Accounts](#)
- [Individual Donations with Incorrect Primary Opportunity Contact Roles](#)

- [Records with Inactive Owners](#)
- [Accounts Missing Record Types](#)
- [Address Inconsistencies](#)

Contacts Without an NPSP Household

As we mentioned earlier, only Contacts that have an NPSP Household get a Household Account, regardless of the type of Account the Contact is currently in (One-to-One, Bucket Individual, or Organization.)

Let's see how this plays out with various Account types.

Contact's Associated Account Type	With a Household?	Conversion Action	Additional Actions
Organization	Yes	Conversion Utility creates a Household Account for the Contact	Conversion Utility creates a Primary Affiliation to the former Organization Account
One-to-One Individual	Yes	Conversion Utility creates a Household Account for the Contact	Conversion Utility doesn't create a Primary Affiliation to the former One-to-One Account
Bucket Individual	Yes	Conversion Utility creates a Household Account for the Contact	Conversion Utility doesn't create a Primary Affiliation to the former Bucket Individual Account
Organization	No	Conversion Utility DOESN'T create a Household Account for the Contact	N/A
One-to-One individual	No	Conversion Utility DOESN'T create a Household Account for the Contact	N/A
Bucket Individual	No	Conversion Utility DOESN'T create a Household Account for the Contact	N/A

To identify which Contacts don't have Households, run these reports:

Data Review	Report Type	Clean Up Process
Every Contact must have an NPSP2 Household in order to get a Household Account	RT: Contacts & Accounts List of all Contacts without a Household	<ul style="list-style-type: none"> Trigger a Household for each Contact. Change the Household Object Rules to "All New and Edited Contacts" and then do a bulk update on all records to trigger the new Households. If you don't want the Contact converted, either delete the NPSP2 Household or remove the Contact from the NPSP Household (for Households with more than one member).

Example: Contact in Organization with a Household

Jane Jones is a direct Contact of an Organization called Acme Corporation and is also a member of a Household. Before conversion, her record looks like this:

The screenshot shows the Salesforce contact record for Jane Jones. At the top, it says 'Contact Jane Jones'. Below this, there are fields for Title, Account Name (Acme), Phone(2), and Email. Underneath, there are tabs for RELATED, DETAILS, and NEWS. The DETAILS tab is selected, showing a table with fields for Name, Account Name, Household, Phone, Mobile, and Email. The values are: Name: Jane Jones, Account Name: Acme, Household: Jones (Jane) Household, Phone: (blank), Mobile: (blank), Email: (blank). Each row has an edit icon (pencil) to its right.

Because Jane Jones has a Household, the Conversion Utility creates a new Household Account, the Jones Household, and moves her Contact record from Acme Corporation to her new Household Account. In addition, if the Account's `_SYSTEM:AccountType` is blank, the Conversion Utility also creates a Primary Affiliation to her old Organization Account (Acme Corporation).



Note

If the `_SYSTEM:AccountType` was One-to-One, the Conversion Utility wouldn't create a Primary Affiliation.

After conversion, her record looks like this:

Contact
Jane Jones

Title

Account Name

Phone(2) ▼

Email

Jones (Jane) Household

RELATED

DETAILS

NEWS

Name

Jane Jones

Phone

Account Name

Jones (Jane) Household

Mobile

Example: Contact in an Organization Account without a Household

Jane Jones doesn't have an NPSP2 Household. Since the Conversion Utility doesn't touch Contacts that don't have Households, she remains a direct Contact of the Acme Corporation after conversion. The Conversion Utility won't create a Household Account for her.

Contact
Jane Jones

Title

Account Name

Phone(2) ▼

Email

Acme Corporation

RELATED

DETAILS

NEWS

Name

Jane Jones

Phone

Account Name

Acme Corporation

Mobile

Household

Email

Example: Contact in a One-to-One Account without a Household

Jane Jones is in a One-to-One Account, but doesn't have a Household. The Conversion Utility won't create a Household Account for Jane.

Households Without Contacts

The Conversion Utility creates a Household Account for every Household, even if the Household has no associated Contacts (Household Members). Consider deleting any Households without Household Members.

At a minimum, you should run the following reports to identify Households without Contacts.

Data Review	Report Type	Clean Up Process
One-to-One Accounts with no Contacts	RT: Accounts Cross-Filter: Accounts without Contacts	Create Contacts, or delete empty Accounts, or change the Account to an Organization Account
Each NPSP2 Household has at least one Contact	RT: Household Cross-Filter: Households without Household Members	Consider deleting empty Households
Each One-to-One Account has a Primary Contact	RT: Accounts List of all One-to-One Accounts without primary Contact (called One-to-One Contact in NPSP2)	Populate the primary Contact field with the Contact in this Account
One-to-One Account has only one Contact	RT: Contacts & Accounts	Remove any extraneous Contacts from all One-to-One Accounts

Improperly Configured One-to-One Accounts

The Conversion Utility transfers any related Opportunities and Activities from a properly configured One-to-One Account to the Contact's new Household Account.

But the Conversion Utility is very cautious. It only moves Tasks and Opportunities from individual Accounts. If there is any doubt what kind of Account it is, or who the primary Contact is, the Conversion Utility leaves the Opportunity or task on the original Account.

You need to identify and correct any One-to-One Accounts that are misconfigured before conversion.

So, what does a properly configured Account look like?

There are two parts to a properly configured Bucket Individual Account:

- `_SYSTEM: AccountType = Individual Bucket`
- `_SYSTEM: IsIndividual = True`

There are four parts to a properly configured One-to-One Account:


- `_SYSTEM:AccountType = One-to-One Individual`
- `_SYSTEM:IsIndividual = True`
- Primary Contact/One-to-One Contact is populated with a Contact whose Account is this Account (API Name `npe01__One2OneContact__c`)
- The Contact in this Account must match the Primary Contact specified above



Note

To view the underlying One-to-One Account, you may need to disable the Account View Override button.

We recommend that you create a formula to help identify Accounts where the Primary Contact is missing or mismatched. Then you can run a report looking for the formula field you created.

Field Name	Type	Formula	Why?
Misconfigured One-to-One Accounts	Text	<pre>If (npe01__SYSTEM_AccountType__c = 'One-to-One Individual', IF (ISBLANK (npe01__One2OneContact__c), 'Missing Primary Contact', IF (npe01__One2OneContact__r.AccountId <> Id, 'Primary Contact Account Mismatch', '')), '')</pre> <div>  Note You can substitute Individual Bucket in place of One-to-One Individual, if you want to find Individual Bucket Accounts. </div>	<p>To find Accounts where the Primary Contact is missing or mismatched with Contact.</p> <p>You can then create a Contacts & Accounts report where this field is not blank.</p>

**Note**

Consider deleting empty One-to-One Accounts that don't have Opportunities, Activities, or Contacts.

Individual Donations with Incorrect Primary Opportunity Contact Roles

The Conversion Utility moves all properly configured Individual Opportunities to the new Household Account of the Contact with the Primary Opportunity Contact Role. (Most organizations use Donor, but the name of the Opportunity Contact Role is not important.) There are a few things to keep in mind about the Opportunities and Accounts.

- Each individual Opportunity should have only one Primary Opportunity Contact Role.
- The Conversion Utility won't work when a single Contact has both a Primary hard credit Contact Role and a soft credit Contact Role. Either delete the soft credit role altogether, or plan to export the soft credit roles and reimport them after conversion.
- Opportunities can have multiple soft credit roles for non-primary Contacts.

If your Opportunity Contact Roles don't meet the requirements listed above, the Conversion Utility leaves the Opportunities on the original Account. You'll have to manually reparent these to the correct Household Account after conversion.

Run the following reports to identify Opportunities with problematic Contact Roles.

Data Review	Report Type	Clean Up Process
More than one Contact Role marked as primary	List of One-to-One Opportunities with more than one Contact Role marked as primary	Make sure only one Contact Role is marked primary for each Opportunity
No Primary Contact Role	List of One-to-One Opportunities without a Primary Contact Role	Make sure one Contact Role is marked primary for each Opportunity
Total Gifts Match	Compare the Total Gifts on the One to One Account to the Total Gifts on the Contact	Fix the Contact Roles for any of the Contacts where the totals do not match.

If your Contact Roles on all Opportunities are correct, the Total Gifts on the One-to-One Account should match the Total Gifts on the Contact. To find cases where the data doesn't match, create a formula field on the Contact object that compares the Contact's Total Gifts

field with its corresponding Account's Total Gifts field. Then run a report using this field to see where the totals don't match. See the table below for more details:

Field Name	Type	Formula
Total Gifts Match	Formula: Checkbox	<pre>IF(Account.npe01__SYSTEM_AccountType__c = 'One-to-One Individual', IF(npo02__TotalOppAmount__c = Account.npo02__TotalOppAmount__c, True, False), False)</pre>

There are some issues that standard reporting won't find, but you can find them using Workbench or Developer Console and SOQL queries. Copy this query into one of those tools, and you'll get a list of Opportunities with more than one primary Contact role.

Issue	Query	Why
Duplicate Primary Contact Roles	<pre>SELECT OpportunityId, COUNT(Id) FROM OpportunityContactRole WHERE IsPrimary = TRUE GROUP BY OpportunityId HAVING COUNT(Id) > 1</pre>	This query returns a list of Opportunity IDs that have more than one Primary Contact Role.

Records with Inactive Owners

The Conversion Utility requires that all Contacts, Accounts, Households, Opportunities and Tasks have active owners.

We recommend you run the following report to identify objects with inactive owners.

Data Review	Report Type	Clean Up Process
All Contacts, One-to-One Organizations, Households, individual Opportunities, and Tasks must have active owners	Custom Report Types on each object that includes the [Object] Owner: Active field via Lookup	Transfer records to active owners

There are some issues that standard reporting won't find, but you can find them using Workbench or Developer Console and SOQL queries. Copy these queries into one of those tools, and you'll get lists of objects with inactive owners.

Object	Query	Why
Contact	<pre>SELECT Id, OwnerId, Owner.FirstName, Owner.LastName, FirstName, LastName FROM Contact WHERE Owner.IsActive = FALSE</pre>	This query returns any Contact with an inactive Owner.
Account	<pre>SELECT Id, OwnerId, Owner.FirstName, Owner.LastName, Name FROM Account WHERE Owner.IsActive = FALSE</pre>	This query returns any Account with an inactive Owner.
Household	<pre>SELECT Id, OwnerId, Owner.FirstName, Owner.LastName, Name FROM npo02__Household__c WHERE Owner.IsActive = FALSE</pre>	This query returns any Household with an inactive Owner.
Task	<pre>SELECT Id, OwnerId, Owner.FirstName, Owner.LastName, WhatId, What.Type, Subject FROM Task WHERE Owner.IsActive = FALSE</pre>	This query returns any Task with an inactive Owner.

Accounts Missing Record Types

Nonprofit Success Pack includes the ability to designate an Account Record Type for your Account Model. Once you select this Record Type, in NPSP Settings under Household, the Nonprofit Success Pack automatically adjusts the `_SYSTEM:AccountType` and `_SYSTEM:IsIndividual` fields whenever you choose this record type. This is a valuable new feature.

Even in NPSP2, every Account should have a Record Type. If you didn't have Record Types before, you should create them before the conversion and assign them to each Account. Create a Record Type specifically for the One-to-One Account and assign the Organization Record Type to any other Account.

To identify NPSP2 Accounts without Record Types, run an Account report with the filter Record Type = null

Data Review	Report Type	Clean Up Process
Every NPSP2 Account should have a Record Type	List of Accounts where Record Type equals (null)	Create Record Types and assign them to each Account

However, bear in the mind that both NPSP2 and the Conversion Utility are agnostic to Record Type. The Conversion Utility only looks at whether the `SYSTEM:AccountType` and `SYSTEM:IsIndividual` fields are set correctly, regardless of Record Type.

Address Inconsistencies

As discussed above, Address Management is one of the features that comes with the Household Account model. The Conversion Utility automatically creates an Address record for the Household Account.

If there is **any** difference between the address on the Household and the Contact's mailing address—even a minor formatting difference, such as "123 Main Street" versus "123 Main St."—the Conversion Utility creates an additional Address record for the Contact. The Conversion Utility selects the **Address Override** checkbox on the Contact if it finds a mismatch between the Mailing Address on Contact and the Household Address, thereby disrupting the automatic sync between Contact and Household Account.

Be sure to standardize your Addresses before running the Conversion Utility.

Create Legacy Household ID and Legacy Account ID Fields

The Conversion Utility removes each Contact from its original NPSP2 Household and Account. You may have custom fields on the NPSP2 Household that need to be moved to the newly created Account, so you'll need a way to identify which NPSP2 Household or Account the Contact was originally connected to. This task is much easier if you have the old Salesforce IDs as a match.

If you have custom fields on the Household object, you should:

- **Create a Legacy Household ID field on Account.** Leave this field blank—you map this field as part of the conversion process and the Conversion Utility fills this in.
- **Create a Legacy Account ID field on Contact.** You will need to manually copy the Account ID for each Contact to this field before you run the Conversion Utility. Unlike the Household ID field, this doesn't get mapped automatically during conversion. After you run the Conversion Utility, the Contact is no longer connected to this Account. You can always do this step after conversion with your backups, but it's less of a headache to do it before.

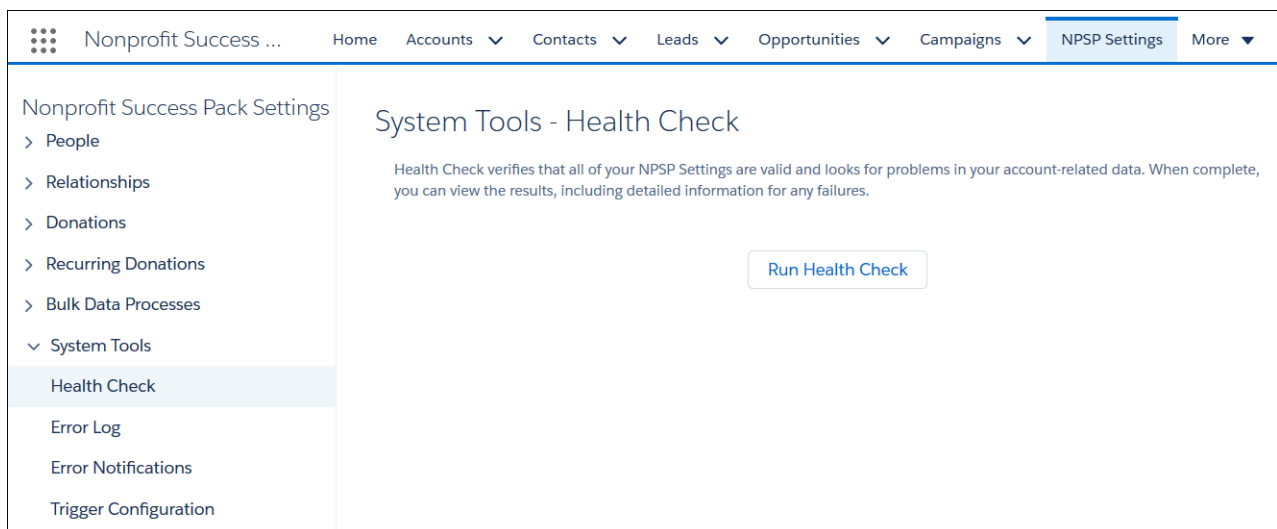
**Tip**

Create these fields in Production before you create your full Sandbox so you don't have to do it twice!

Run Health Check

Run Health Check from NPSP Settings to identify any issues with your data.

It's important to have a "clean bill of health" for your org before you run the Conversion Utility. We recommend running Health Check frequently throughout your pre-conversion cleanup process, to ensure that there are no errors.



Purchase or Create A Sandbox (And Add Data!)

Before you run the Conversion Utility in your Production org, you need to test it in a fresh Sandbox with data that strongly represents what you have in Production.

- **Purchase a Full Sandbox**—This is especially important if you have more than 10,000 Account, Contact, or Opportunity records, as a Partial Copy Sandbox won't work in this case. Talk to your Account Executive to get more details and pricing.
- **Populate your Sandbox with data that strongly represents what you have in Production.** Be sure to include a mix of Account types, Opportunities, etc, but remember that you don't need a huge amount of data—250 Accounts will do. You can use Data Loader or a third-party copying tool such as Smart Sandbox or SFXOrgData.

- **Consider data storage limits.** Data limits are strictly enforced in Sandbox, so if you're close to your data storage limits, consider deleting some non-essential data (such as Campaign Member records) **before** you run the Conversion Utility. Keep in mind that the conversion creates an Account record for every Household and at least one Address record for every Household with an address. You can delete the old Household and One-to-One Accounts later, but during conversion and testing you need enough space to handle all these records.
- **Consider Sandbox refresh dates.** Note that full Sandboxes can only be refreshed every 29 days, but you may be able to do some interim testing in a partial Sandbox, which can be refreshed every 5 days. Do as much pre-conversion work as you possibly can, because you won't be able to refresh often.

Ready, Set, Convert!

It's time to run the utility! Unless otherwise noted, you should do these tasks in both your Sandbox and Production orgs.

Export Your Data (Production Only)

Take a full data export prior to conversion using Salesforce Data Export or another backup service. We recommend that you clearly label and date your backup as Pre-Conversion in case you need to refer to it later.

Lock Users Out of Production (Production Only)

You need to lock all users out of Salesforce while running the Conversion Utility. Depending on the number of users in your organization, you can edit profile login hours, freeze individual users, or temporarily assign all users to a Maintenance Window profile.

The Conversion Utility can take anywhere from a few minutes to several hours to run, depending on the number of Contacts, Households, and Opportunities in your organization. Most likely, you'll want to keep users locked out until you've verified that all data converted successfully and that all automatic processes are re-activated.

Enable the Household Account Record Type For All Profiles

If you haven't already done so, enable the Household Account Record Type for all profiles but **do not** mark it as the default Record Type because you don't want users to manually create Household Accounts (NPSP automatically creates a Household Account when a user creates a Contact). Assign a different Record Type, such as Organization, as the default Record Type for each profile.

Disable Automatic Processes

To ensure that the Conversion Utility runs smoothly:

- Disable any workflow rules, processes, custom triggers, and validation rules.

- Delete any Scheduled Jobs that may run during the conversion period. You can reschedule them afterward. Note that NPSP Scheduled Jobs are automatically rescheduled for you once you click on the NPSP Settings tab after conversion.
- Disable any Data.com matching rules.
- Remove required field restrictions on Contact, Account, or Opportunity fields (no need to remove page layout-level field requirements).
- Disable or log out of any non-NPSP apps such as Rollup Helper, survey tools, or other fundraising or email applications that process activity in real-time.

Now, you're ready!

Run the Conversion Utility

1. Be sure you're logged into the org you want to run the Conversion Utility in.
2. Add `/apex/np__CONV_Account_Conversion` to the base URL of your Salesforce organization. For example: `https://na15.salesforce.com/apex/np__CONV_Account_Conversion`

3. You see the Account Model Conversion Utility.

Account Model Conversion Utility

This page is designed to help you convert your organization from an existing 1x1 or Individual Account model to the new Household Account Model.

Important Information

This is a permanent change. Please make sure to consult with your local expert before proceeding. While the conversion is completing, your database functionality will be temporarily disabled to avoid accidentally modifying existing data. Salesforce.com and Salesforce.org are not responsible for any data loss, modifications, or corruption that occur as a result of this operation. Please proceed at YOUR OWN RISK. Before beginning this process, you'll need to confirm the following steps have been taken:

- ☒ All users have logged out of my Salesforce instance.
- ☒ My data has been backed-up by going to Setup | Data Management | Export Data
- ☒ All Data.com Duplication Management Rules have been disabled.
- ☒ The conversion process has been tested in a fresh sandbox.
- ☒ All record ownership has been transferred from any inactive users.
- ☒ All workflows and any custom validation rules have been disabled.
- ☒ All required field restrictions for custom fields have been removed.
- ☒ I am aware this tool will only work for Contacts that currently have a Household associated.
- ☒ All non-NPSP apps have been temporarily uninstalled or disabled.
- ☒ I've consulted with my local Salesforce expert.
- ☒ I accept the risk associated with using this tool, including data loss and inconsistent data.

What This Tool Does

This tool will process your existing Contacts with Households in batches of 200 Households at a time, attempting to convert them to Household Accounts. Any errors during the conversion will result in one or more failed batches of Contacts while other batches may succeed. This could leave your data in an inconsistent state. If this occurs, you will need to immediately resolve the issue and re-run the conversion utility. The following actions are taken by the batch job associated with this tool:

- All NPSP triggers are disabled (Your custom triggers are not disabled by the utility. For safety's sake, you should disable those too)
- All existing Households are selected, along with their Contacts
- New Household Accounts are created for each existing Household
- Previous Household objects are left in place, and should be deleted manually after verifying the results of the conversion process.
- Non-1x1 Accounts associations to Contacts are removed, new Affiliations created, and Contact Primary Affiliation field is set
- Contacts are disconnected from their 1x1 or Individual Account, and attached to the newly created Household Account
- Opportunities are moved from the 1x1 or Individual Account and attached to the new Household Accounts and Contacts
- Activities and tasks associated with 1x1 or Individual Accounts are transferred to the new Household Account
- Addresses mapped from existing Household and Contacts to new Address objects, then attached to the Contact and Household Account
- Master Household Address set or defined if none exists based on address frequency and Contact giving
- Address overrides are set for any Contact whose address is different from the Household Address
- Primary Contact values are set for all Households
- All NPSP triggers are re-enabled (You'll need to manually re-enable any custom triggers you disabled for the conversion. Also, the utility re-enables all NPSP triggers, so if you selectively disabled any of them beforehand, you'll need to manually disable those again too)

Configuration Options

You can optionally select a custom field on your new Household Account to store the original Household object Id. This can be useful for later reparenting of any lookups or child objects originally on the Household to the new Household Account. Only unused custom fields that hold text are eligible to be selected.

Account Field

-None-

[Begin Conversion Process](#)

- Review the Important Information and check the boxes acknowledging that you've taken all the required pre-conversion steps.
- Click **Begin Conversion Process**.



Note

The default batch size for the Conversion Utility is 200. If there is even one record with an error, the Conversion Utility rolls back the entire batch and each record in the batch fails to convert. If you are running into repeated errors, you may want to reduce the scope size to 10 (or even 1) to help you troubleshoot.

To add a scopesize parameter, add `?scopesize=10` (or whatever number you want) to the end of the conversion tool URL. For example:

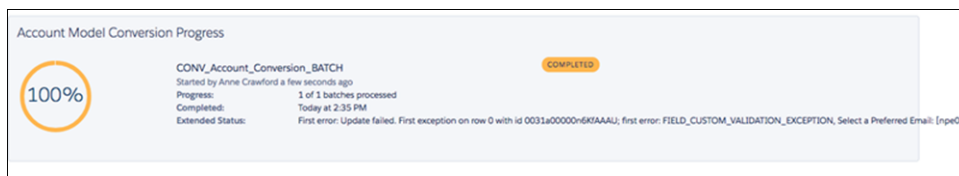
```
https://na15.salesforce.com/apex/npsp__CONV_Account_Conversion?scopesize=10
```


The Nitty Gritty of Conversion Failures

The first time you run the Conversion Utility, you'll likely encounter some errors. Don't panic.

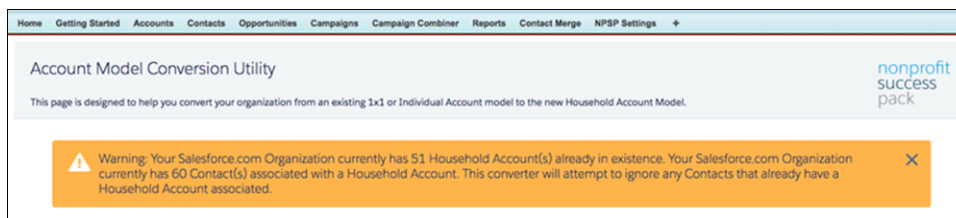
You'll see one error at a time. Fix each error (and any similar errors in your data) and then rerun the utility. Don't worry if only some of your Accounts are already converted, you can continue to rerun until all your Accounts are converted. Here is how it works and what you should do:

1. The Conversion Utility identifies the first failure and gives you the record ID in the error message.



2. Copy the record ID from the error message and find the record in your org. Fix the record and any records with similar issues.
3. Run the Conversion Utility again.
4. If you see another error, repeat this process.

When re-running the Conversion Utility (after the first time), you see this warning. It's okay. The Conversion Utility ignores any Households that it already converted.



Keep correcting errors and running the Conversion Utility until you get to the green success screen. (Have faith—you will get there!)

Account Model Conversion Utility

nonprofit
success
pack

This page is designed to help you convert your organization from an existing 1x1 or Individual Account model to the new Household Account Model.

Account Model Conversion Progress

100%

CONV_Account_Conversion_BATCH

Started by Anne Crawford a few seconds ago

Progress: 1 of 1 batches processed

Completed: Today at 3:26 PM

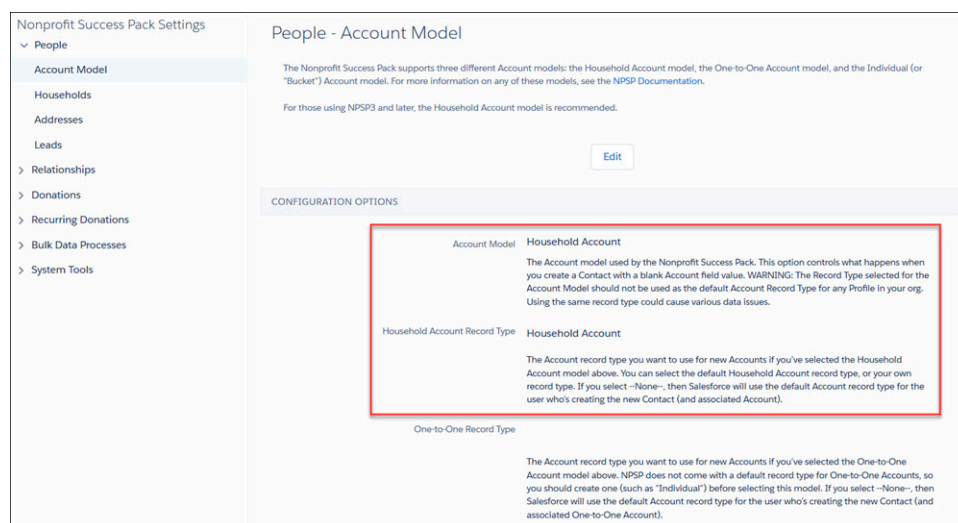
COMPLETED

Perform Post-Conversion Tasks

How do you know if all your data converted correctly? Every organization is unique, but here are a few things to check. Unless otherwise noted, you should do these tasks in both your Sandbox and Production orgs.

Verify Account Model and New Accounts

- In NPSP Settings, the Account Model is set correctly.



- Number of NPSP2 Households = Number of Nonprofit Success Pack Household Accounts
- No Opportunities remain on any One-to-One or Individual Bucket Accounts
- No Tasks remain on any One-to-One Accounts or Individual Bucket Accounts

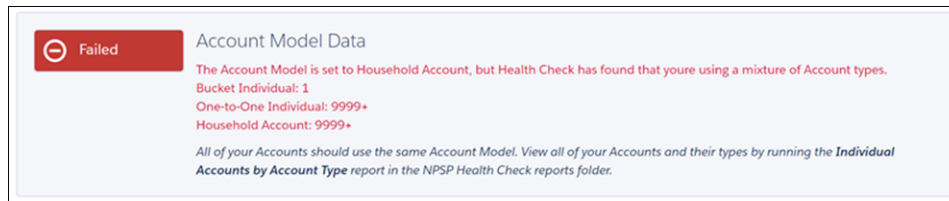
Run Health Check

Run Health Check from NPSP Settings and fix any identified issues.

About The Account Model Data Health Check Error

If you just ran the Conversion Utility, don't be alarmed when you see the Account Model Data Health Check error message. This is an expected error, since the Conversion Utility doesn't delete your legacy One-to-One or Bucket Individual Accounts. Once you've had a

chance to double check your conversion and move any custom data or records to the new Household Account, you can safely delete your legacy One-to-One Accounts.



Migrate Custom Data and Records to the New Household Account

Using the legacy Household ID field you created on the Household Account prior to conversion, migrate any custom data from the NPSP2 Household to the new Household Account. You may also need to migrate data from any related custom objects on the Household such as third-party address management packages.

Consider Migrating From a Custom Solution to Nonprofit Success Pack

If you've been using a custom solution or managed package for Address Management, General Accounting Units, Matching Gifts and Partial Soft Credits, or Grants Management, consider using the new Nonprofit Success Pack functionality instead. Evaluate if it would make sense for your organization to use any of these features and migrate your data accordingly. You may need to get further instructions from the package developer.

Reactivate Items You Deactivated Prior to Conversion

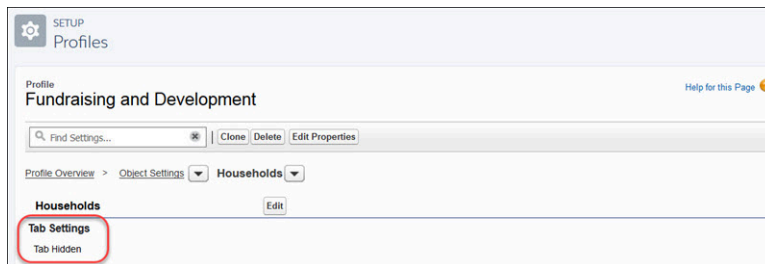
Earlier, we suggested that you deactivate specific items. Now that you've successfully converted, it's safe to reactivate them. These items include:

- Workflow Rules
- Validation Rules
- Processes
- Scheduled Jobs

- Triggers
- Data.com Matching Rules
- Third-Party Applications

Adjust Profiles

You can't uninstall the old Households package, but it's safe to just leave it alone. However, we do recommend that you hide the Households object and tabs on all profiles.



Adjust Page Layouts and Buttons

After conversion, update page layouts as follows:

- On the Contact page layout, add the Address Override and Current Address fields. We also recommend adding the Organization Affiliations related list (if you need it).
- On the Household Accounts page layout, add the Addresses related list. Also, add the Manage Household button.
- On the Organization Accounts page layout, add the Affiliated Contacts related list. You may also want to remove the Contacts related list.
- On the Opportunities page layout, add the Primary Contact field.

On the Account object, we recommend that you disable the Account View Override button.

Update Formulas, Reports, or Email Templates (Production Only)

Remember that list of reports, formulas, and email templates we suggested you make during pre-conversion?

Here's where it comes in handy. Review your formulas, reports, and email templates to identify those that reference the NPSP2 Households object. Update these items so that they reference the Household Account object.

Delete Records (Production Only)

You aren't required to delete legacy Household records, but doing so saves storage space. At a minimum, we recommend that you hide the Household object to avoid confusion. Only delete Household records if you want to save storage space, and only after you are confident that everything has converted correctly.

You aren't required to delete One-to-One Accounts either. But, doing so frees up precious storage space and helps avoid confusion. Only delete One-to-One Accounts if you are confident everything has converted correctly, and that all related Opportunities, Activities, and custom data have been successfully transferred to the new Household Account.

Appendix: Overview of the Conversion Process

This table shows the tasks required to convert and where you need to do them. Some tasks are only required in your Production org, while others should be completed first in your Sandbox org and then your Production org. In order to successfully convert, complete these tasks in the order listed.

Pre-Conversion Tasks–Production	
1	Audit Everything
2	Create a Post-Conversion Plan
3	Spring Clean Your Data
4	Create Legacy Household ID and Legacy Account ID Fields
5	Run Health Check
6	Purchase or Create a Sandbox
Conversion Tasks–Sandbox	
1	Enable the Household Account Record Type For All Profiles
2	Disable Automatic Processes
3	Run the Conversion Utility
4	The Nitty Gritty of Conversion Failures
Post-Conversion Tasks–Sandbox	
1	Verify Account Model and New Accounts
2	Run Health Check
3	Migrate Custom Data and Records to the New Household Account
4	Consider Migrating From a Custom Solution to Nonprofit Success Pack
5	Reactivate Items You Deactivated Prior to Conversion
6	Adjust Profiles
7	Adjust Page Layouts and Buttons
Conversion Tasks–Production	
1	Export Your Data
2	Lock Users Out of Production
3	Enable the Household Account Record Type for All Profiles
4	Disable Automatic Processes

5	Run the Conversion Utility
6	The Nitty Gritty of Conversion Failures
Post-Conversion Tasks–Production	
1	Verify Account Model and New Accounts
2	Run Health Check
3	Migrate Custom Data and Records to the New Household Account
4	Consider Migrating From a Custom Solution to Nonprofit Success Pack
5	Reactivate Items You Deactivated Prior to Conversion
6	Update Formulas, Reports, and Email Templates
7	Adjust Profiles
8	Adjust Page Layouts and Buttons
9	Delete Records

Appendix: Convert Without Using the Conversion Utility

Our recommendation is to use the Account Conversion Utility if at all possible. This is the preferred method that is supported by Salesforce.org.

However, an alternative conversion method or System Field conversion can be considered in a few very specific cases:

- You are not using the Household object **at all**.
- You have no Households with more than one Contact in the Household and you have no custom fields on the Household.

Pros:

- The conversion is a simple data update on existing Accounts. Contacts, Opportunities, and Activities are not reparented. You also don't need to move any custom data after conversion.
- You don't have to worry about exceeding data storage limits during conversion.

Cons:

- You won't have a separate record to compare to if there is a mistake or problem. You would have to restore from a backup.
- You'll have to import addresses into the Address object after conversion. Depending on how closely Contact and Account addresses match, this may require quite a bit of work.
- There is no utility to help you convert.

Prepare

Before you attempt this data conversion, do the following:

1. Run Health Check and correct any errors.
2. Double check that there aren't any Organization Accounts that are incorrectly set as One-to-One Accounts—once you convert these Accounts to Households, NPSP renames them with the name of the Primary Contact!

3. Run reports to find and fix:
 - All One-to-One Accounts without Contacts
 - One-to-One Accounts whose Primary Contact is not this Account
4. (Optional) It's always a good idea to clean up Opportunities and Opportunity Contact roles, even though no data is being reparented.
5. Enable field history tracking on Account Name so you don't lose the old Account name (in case of error).
6. Move all Organization Accounts to a separate record type (i.e. Organization.).
7. Consider whether you need to disable third-party applications or automatic processes.

Convert

**CAUTION**

You should only use this method if you meet one of the two scenarios described in the Requirements section.

To convert to the Household Account Model without running the Conversion Utility:

1. Back up your data.
2. Enable the Household Account model in NPSP Settings.
3. Enable the Household Account record type on all profiles (if you haven't already).
4. Update the `_SYSTEM:AccountType` field to `Household Account` and assign the Household Account record type to all One-to-One Accounts.
5. Run Health Check and fix any identified errors.

Import Addresses

Address records aren't automatically created when you do a work-around conversion. You need to import them to the Address object.

1. Export all Household Account Billing Addresses.
2. Export all Contact Mailing Addresses.
3. Compare Account Billing Address to Contact Mailing Address for all Contacts.
4. Uncheck the Treat Minor Address Change box on NPSP Settings (you want the change to trigger an Address record).

5. Where there is a mismatch between Account and Contact addresses, import the Contact Mailing Address back to the Contact with the Address Override box checked.
6. Import Account Billing Addresses to the Address object with Default Address = TRUE.