



Customer Success Story

The client improves **operational efficiency** and **utilizes standard donor management features** by migrating from the **Salesforce Education Data Architecture** to the **Nonprofit Success Pack**.

About the Client

The client is California's 116th public community, includes child development centers, arts centers, business development centers, and holds schools for training chefs.

Solution

- DemandBlue set up **Nonprofit Cloud** and helped leverage **out-of-the-box features**.
- We customized Salesforce to set up **Contact** and **Account management**, enabling organization **tracking engagement**.
- We migrated custom objects & customizations to preserve custom business processes.
- Our team created **automation rules** and set up apps and management platforms like Click & Pledge Donor Management.
- We set up **users**, profiles, and **Permission** sets and re-establish the Salesforce connections for the installed Salesforce apps.
- The team installed and set up the **Eventbrite app** and **Declarative Lookup Rollup Summaries Tool**.
- We migrated the client's data from the Education Data Architecture to the Nonprofit Success Pack Architecture following necessary practices: **data import file preparation**, file **validation**, test import, and a **final import** using Data loader.

Benefits

- ✓ We enabled the new org with NPSP settings to maintain operational effectiveness while adding the Outbound Funds Module to meet the needs of tracking both incoming and distributed funds.
- ✓ Configured the Declarative Rollup Summary app alongside NPSP Customizable Rollups for effective operational efficiency of the nonprofit instance.
- ✓ Prepared CSV files for seamless Data import and validation to avoid discrepancies like data silos and duplication.