Nonprofit Success Pack Upgrade Guide

@salesforcedocs

Last updated: October 11, 2016

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INTRODUCTION

You've been using Nonprofit Starter Pack for a while, so you may have heard about Salesforce.org's new and improved version of NPSP, with its great new features and improved architecture. But you're not sure what it will take to upgrade your organization to take advantage of the latest and greatest. Is it going to be hard? Expensive? Worth the time? If it feels like we're reading your mind, then you're in the right place.

This workbook covers the process for upgrading from a previous version of the Nonprofit Starter Pack to the latest version. We strongly recommend the upgrade to Nonprofit Success Pack (NPSP) for all users. It takes very little prep and is designed to be as easy and straightforward as possible.

Note: As of September 26, 2016, Nonprofit Success Pack is the new name for NPSP3. If you have NPSP version 3.0 or later, you don't need to upgrade; you already have Nonprofit Success Pack!

This workbook does not cover converting data to the new Household Account model. (A separate workbook for converting to the Household Account model is coming soon—please stay tuned.) But you can still complete the upgrade process, leave your data and Account model exactly as is, and still get most of the amazing benefits of NPSP.

Thanks to the many members of the Nonprofit Community who contributed to this document at the Spring 2016 NPSP Community Sprint in San Francisco, especially Anne Crawford, who fearlessly led the project.

- **Bonny Hinners**
- **Tracy Kronzak**
- **Jessica Kwok**
- **Kevin Larson**
- **Sarah Layton**
- **Kathryn Lee**
- **Judi Sohn**
- **Lauren Wild**

PART I: THE NEW WORLD OF NPSP

In this section, we'll introduce you to the Nonprofit Success Pack (NPSP) and take you on a brief tour of the application's history. We'll also help you figure out what version of NPSP you currently have.

What is NPSP?

Prior to 2014, Salesforce.org (then Salesforce Foundation) managed NPSP as five separate-but-connected packages (Affiliations, Contacts & Organizations, Households, Recurring Donations, and Relationships) on the AppExchange.

In July 2014, Salesforce.org released the NPSP3 as a new-and-improved way for nonprofits to manage their operations on the Salesforce platform. NPSP consolidates the original packages along with a sixth package, named the Nonprofit Success Pack, and installs them using a single installer. As of September 26, 2016, NPSP3 has been renamed to Nonprofit Success Pack. Once the Nonprofit Success Pack is installed, Salesforce.org automatically pushes out updates to the product every two weeks. This ensures you always have access to the newest enhancements and features.

There are a variety of features to take advantage of in Nonprofit Success Pack:

- Improved Account Model
- Better Donation Management (including support for in-kind gifts, matching gifts, and donation allocations)
- Consolidated NPSP Settings, and much more.

For a full list of NPSP features, see the Nonprofit Success Pack Documentation in the Power of Us Hub.

Can I Upgrade to Nonprofit Success Pack?

Whether or not you can upgrade depends on what version you're using now. Here's how to figure it out.

1. In Salesforce Setup, enter `Packages` in the Quick Find box, then click **Installed Packages** under the Build menu.
2. Look for packages with Salesforce.com Foundation or Salesforce.org listed in the Publisher column. You can identify which version you have by checking the Version Number.
    - If you have packages with version numbers that start with a 1 or a 2, you are on NPSP 2 and need to upgrade. You may not have all five NPSP 2 packages installed. When you upgrade, the NPSP installer installs any missing packages and upgrades all other packages to the latest version.

Installed Packages

Action	Package Name	Publisher	Version Number	Namespace Prefix	Status
Uninstall	Relationships	Salesforce.com Foundation	2.0.2	npe4	Active
Uninstall	Affiliations	Salesforce.com Foundation	1.55	npe5	Active
Uninstall	Recurring Donations	Salesforce.com Foundation	2.0.15	npe03	Active
Uninstall	Contacts & Organizations	salesforce.com Foundation	2.1.4	npe01	Active
Uninstall	Households	Salesforce.com Foundation	2.4.8	npo02	Active

- The installer can install on top of any version of an NPSP package, as shown above, as long as it was originally installed from the Salesforce.com Foundation.
- If you have packages (such as Contacts & Organizations) with Version Numbers that start with 3.x, you don't need to upgrade. All future upgrades will be automatically pushed to your organization.

Action	Package Name	Publisher	Version Number	Namespace Prefix	Status
Uninstall	Contacts & Organizations	Salesforce.org	3.3	npe01	Active
Uninstall	Households	Salesforce.org	3.5	npo02	Active
Uninstall	Recurring Donations	Salesforce.org	3.4	npe03	Active
Uninstall	Relationships	Salesforce.org	3.2	npe4	Active
Uninstall	Affiliations	Salesforce.org	3.2	npe5	Active
Uninstall	Nonprofit Success Pack	Salesforce.org	3.81	npsp	Free

Note: As of September 26, 2016, Nonprofit Success Pack is the new name for NPSP3. If you have NPSP version 3.0 or later, you don't need to upgrade; you already have Nonprofit Success Pack!

For more information, see Which Version of Nonprofit Success Pack Am I Using?. If you have any questions about NPSP versions, post a question in the Upgrading to latest NPSP group in the Power of Us Hub.

What if I don't see any packages published by Salesforce.com Foundation?

The short answer is that you aren't on NPSP. You can install NPSP, but you can't upgrade. There are two scenarios where this might be the case.

- You're on a pre-cursor to the Nonprofit Starter Pack, such as Nonprofitforce, SPN, NPower, Groundwire, or OneNorthwest

  These were developed by various consultants prior to the release of the Nonprofit Starter Pack in 2008. While these packages share much of the same functionality as NPSP, and were eventually replaced by NPSP, they can't be upgraded.

- You aren't running any version of the NPSP

If either of these scenarios describes your Salesforce organization, you may need to migrate your data to the Nonprofit Success Pack or migrate to a fresh instance of Salesforce. Depending on your level of expertise, you may need to engage a partner to help you. This process is out of scope of this document.

PART II: GET READY TO UPGRADE

You can never be too prepared! In this section, we'll go over some prerequisites.

Prerequisite Knowledge — What you Need to Know Before you Start

Before you start upgrading your org, make sure that you fully understand the prerequisites.

Know Salesforce

To successfully upgrade to Nonprofit Success Pack, you must be a System Administrator for your Salesforce organization with a reasonable amount of experience. You should be comfortable with basic tasks, including:

- Install apps from the Appexchange
- Create/delete fields and tabs
- Adjust picklist values
- Manage record types
- Manage sales processes
- Manage user profiles
- General troubleshooting

If you aren't comfortable with these admin tasks, consider investing some time in training before you embark on this process. The Beginner and Intermediate Administrator trails are a great place to start. The Power of Us Hub, Salesforce Help & Training, and the Salesforce Success Community are also wonderful free resources.

Know Your Setup

You should have fairly in-depth knowledge of your Salesforce organization setup. Create a list of third-party apps you have installed in addition to NPSP 2 and determine if you have custom code that was added by a developer. These can have an impact on your upgrade process. If you are new to your organization, try to find documentation from a former System Administrator covering these topics. If none exists, explore the Setup menu of your organization for more information.

Know the Upgrade Process

The best way to become familiar with the upgrade process is to read this guide BEFORE you start upgrading! Understanding the whole process, as well as common problems and pitfalls, will help you upgrade as efficiently as possible.

Get to Know Nonprofit Success Pack

Nonprofit Success Pack comes with many new features, so you may want to spend some time investigating what is available, and determine which features to roll out in your organization. For a full list of NPSP features, see the Nonprofit Success Pack Documentation in the Power of Us Hub.

Make Sure your Users Know What's Coming

It's also important to remember that once the upgrade process is complete, your work isn't done. Your users will now be interacting with this new product, and you need to prepare them for the transition. Consider giving your users some training in a Sandbox organization, or at least a sneak peek at what it will look like, before you complete the upgrade process.

Prerequisite Knowledge — Sandbox Organizations

A Salesforce Sandbox organization is a copy of your Production Salesforce organization in a separate environment. When you create a Sandbox org, Salesforce copies your Production org setup (known as the metadata) into that Sandbox org. You can use your Sandbox org to test changes to your Salesforce setup without risking or compromising the data in your Production org. Testing new apps and upgrades in a Sandbox org is always a best practice.

If you plan to roll out Nonprofit Success Pack features right away, use your Sandbox org to familiarize yourself with those features so you can create training materials or documentation for your users.

Important: Upgrade in a Sandbox org **before** undertaking the process in your Production org to prevent disruption of your day-to-day business processes.

Some things to keep in mind:

- A successful Sandbox org test install is not a guarantee of a successful install in your Production org, but it can give you a preview of issues or errors that you might encounter. That way, you can address those issues before beginning your Production org installation.
- You don't need a Full Sandbox org to test Nonprofit Success Pack. You can use a Developer or Developer Pro Sandbox org (which are available for free!). By default, nonprofit Sandbox orgs don't have data. That's okay.
- You don't need to copy your Production org data to your Sandbox org to test your NPSP upgrade. However, once you've installed the latest version of NPSP successfully in your Sandbox org, you should thoroughly test all your processes in that Sandbox org.

If you haven't worked with a Sandbox org, check out this Trailhead module. To learn more about the types of Sandbox orgs, see the Sandbox Overview in Salesforce Help & Training.

How Long Should This Take?

The amount of time it takes to upgrade depends largely on the setup of your Salesforce organization. If your org is complex, with many installed apps and custom code, you'll need to spend more time investigating how Nonprofit Success Pack will interact with all of these different components. If you have a small and straightforward org with few customizations, you should be able to complete your upgrade in a day. The actual package installation usually takes less than 15 minutes (barring any errors). It's the pre- and post- work that will take up most of your time.

Allow yourself ample time to test, resolve errors, and complete the post-install steps before your end users can begin working with Nonprofit Success Pack.

Important: Be sure to choose a time for the upgrade when other users are not actively working in the org. While users could log in and view records during the upgrade process, adding or editing records will cause problems. It's best to keep users out of the org during upgrade.

PART III: READY, SET, UPGRADE!

Now comes the fun part! In this section, we'll walk you through the upgrade process.

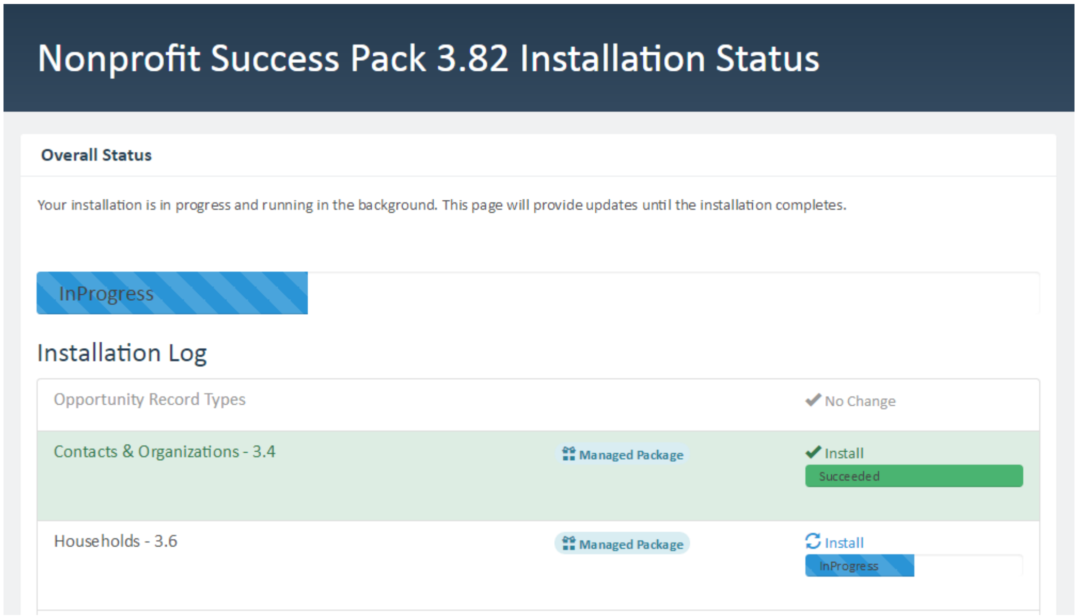
To successfully upgrade your org, complete these steps in order.

1. Install Nonprofit Success Pack in your Sandbox Organization
2. Review NPSP in your Sandbox Organization
3. Test NPSP in your Sandbox Organization
4. Check Code Coverage in your Production Organization
5. Install NPSP in Your Production Organization

Install Nonprofit Success Pack in your Sandbox Organization

We recommend that you install NPSP in a Sandbox org so that you can test the process.

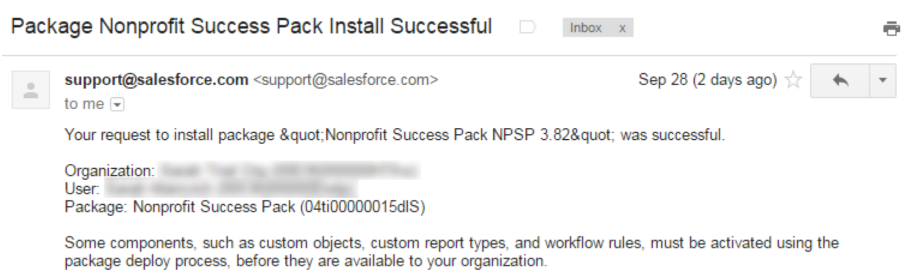
1. Log in to the Sandbox org where you plan to install Nonprofit Success Pack.
2. In a separate tab in your browser, open the Installer Page and follow the instructions. Select the option to log in to your Sandbox org and use your Sandbox org username. Your Sandbox org username is your Production org username, followed by a period, followed by the name of your Sandbox org. For example, if your Production org username is john@nonprofit.org, and your Sandbox org is named test, then your Sandbox org username is john@nonprofit.org.test.
3. Confirm the username for the Sandbox org you logged in to and Salesforce will begin the installation.
   - The installer works one module at a time and notifies you when each package has been successfully installed, or if there are errors.

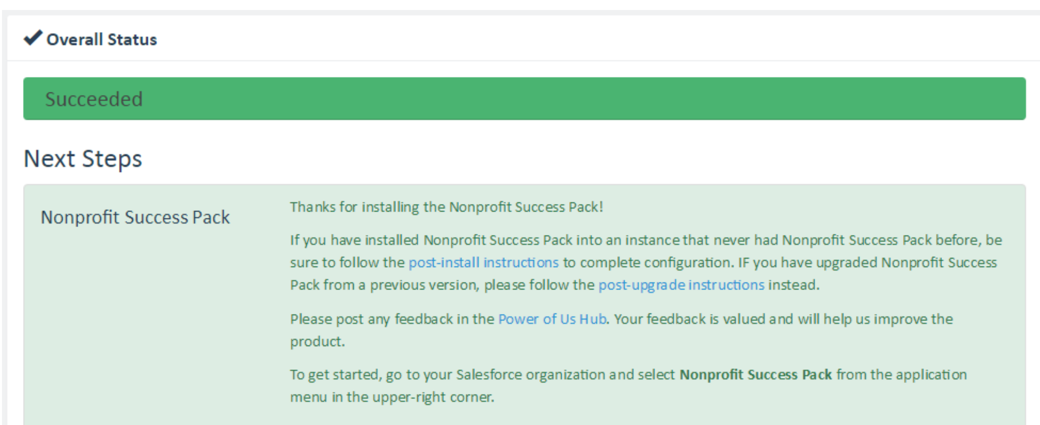


- If you encounter an error, the installer shows an error message. Once you fix the error, you can try installing again by starting over from the Installer page. Any packages that were successfully installed won't be installed again. See the Troubleshooting Common Errors section below for a list of frequently-encountered errors.

  Note: You should note any errors you fix in your Sandbox org so that you can fix them in your Production org before upgrading.

4. The installation is complete when you see a success message, or you receive email notification that the package named Nonprofit Success Pack has been successfully installed.

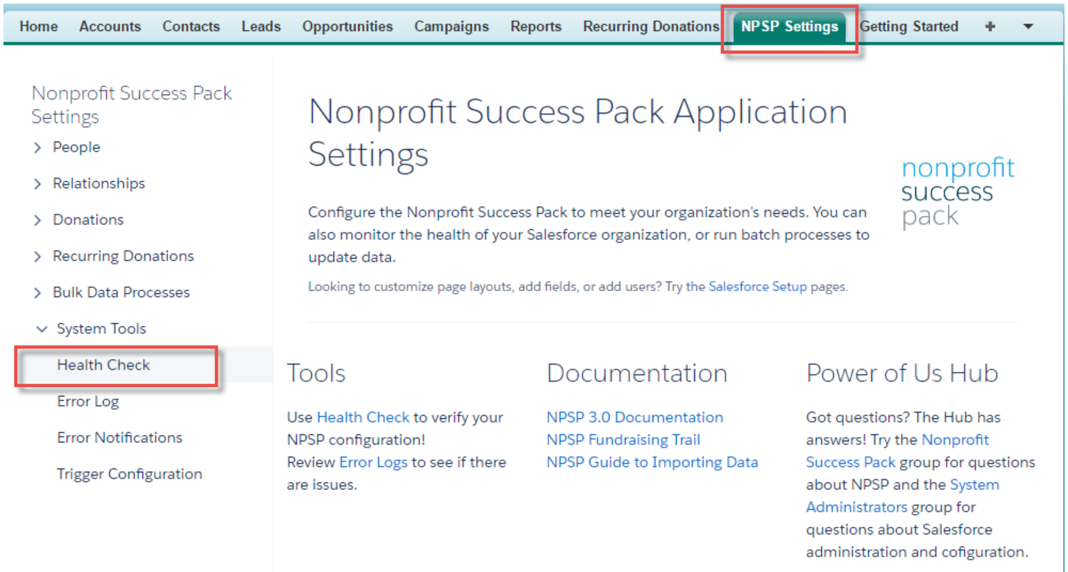




Review NPSP in your Sandbox Organization

A great feature in Nonprofit Success Pack is the NPSP Health Check. NPSP Health Check verifies your NPSP settings and checks your data for incompleteness or inconsistencies. In a Sandbox org, NPSP Health Check only looks at your configuration, but it's still an excellent way to catch issues that might arise in your Production org.

1. In your Sandbox org, go to the **NPSP Settings** tab.
2. Click **System Tools** > **Health Check** in the menu on the left side of the page.
3. Click **Run Health Check**.
4. Fix any configuration errors identified by Heath Check in both your Sandbox org and Production org.



Test NPSP in your Sandbox Organization

Once NPSP is successfully installed in your Sandbox org, and you've fixed any configuration errors, it's time to test it out. Go through all of your normal business processes, focusing on processes that rely on custom integrations or unmanaged packages. The goal is to make sure everything continues to work as you expect. The providers of your third-party apps might even have documentation about how NPSP affects their functionality.

Here are some ideas to get you started in your testing:

- Create a Contact
- Add a Contact to a Household
- Add an Organization
- Add an Opportunity
- Add a relationship between two Contacts
- Add an Affiliation between a Contact and an Organization
- Delete some of the records you created

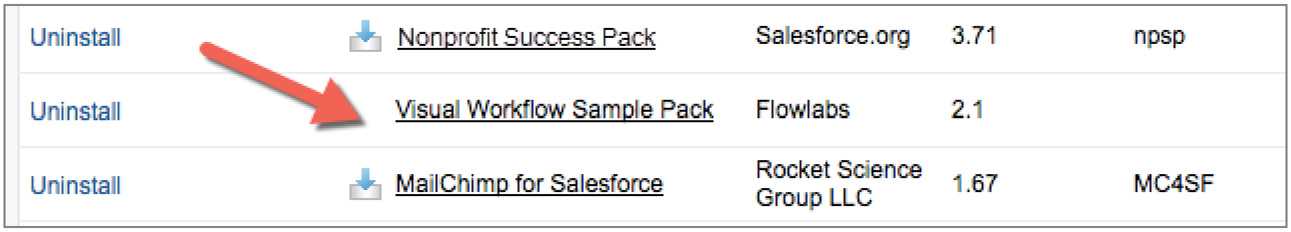
Check Code Coverage in your Production Organization

Unmanaged applications or code could cause failures when you install the latest version of NPSP in your Production org. If you have unmanaged apps or code in your organization, it's best to check your test code coverage.

To figure out if you have unmanaged applications, look at the list of Installed Packages:

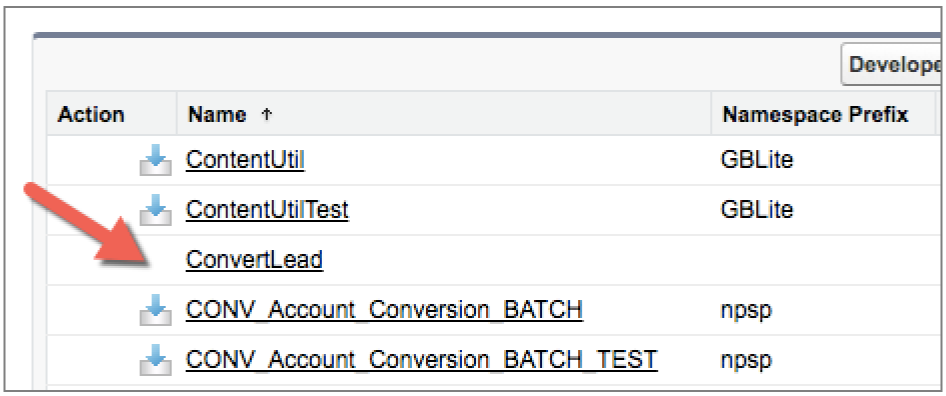
1. In Setup, enter `Packages` in the Quick Find box, then click **Installed Packages** under the Build menu.
2. In the resulting list, look for apps that don't have the managed icon ( ). These packages are unmanaged.

Example: In the example below, the Visual Workflow Sample Pack is unmanaged.



Also check to see if you have unmanaged code by viewing the Apex Classes in your organization.

1. In Setup, enter `Apex` in the Quick Find box, then click **Apex Classes** under the Develop menu.
2. In the resulting list, look for Apex Classes that don't have the managed icon ( ). In this example, `ConvertLead` is unmanaged.



If you found unmanaged apps or code, you should check your code coverage and unit tests. NPSP will not install properly in your Production org if your instance has failing code coverage or unit tests. To find detailed information on how to check code coverage, go to Appexdix A: Troubleshoot Common Issues.

If you don't have unmanaged apps or code in your Salesforce organization, Congratulations! You are ready to install NPSP.

Install NPSP in Your Production Organization

Once you have thoroughly tested NPSP in your Sandbox org, it's time to move on to your Production org.

Installing in your Production org is similar to installing in your Sandbox org. To successfully install NPSP in your Production org, you must complete the following (in order):

1. Back up your data.

   Important: Before you begin anything, back up all of the data in your Salesforce Organization. For instructions on how to back up data in Salesforce, see Maintaining an Effective Salesforce Backup.

2. Run the NPSP Installer in your Production org. Be sure to use the username and password for your Production org this time.
   a. Log in to the Salesforce org where you want to install NPSP.
   b. In a separate tab in your browser, open the Installer Page and follow the instructions. Select the option to log in to your Production org and use your Salesforce org username.
   c. Confirm the username for the Salesforce org you logged in to and Salesforce will begin the installation of NPSP.

The installer notifies you when each package has been successfully installed, or if there are errors.

3. Run Health Check.
   a. Select Nonprofit Success Pack from the drop-down menu in the upper right corner.
   b. Click the **NPSP Settings** tab, then click **System Tools** > **Health Check**.
   c. Click **Run Health Check**.

      Health Check will either report that all tests passed or show detailed error messages for tests that failed. Hopefully you have already fixed anything you uncovered in your Sandbox org testing and won't encounter any surprise errors. If you do, see Appendix A: Troubleshooting Common Errors for help.

PART IV: PERFORM POST-UPGRADE STEPS

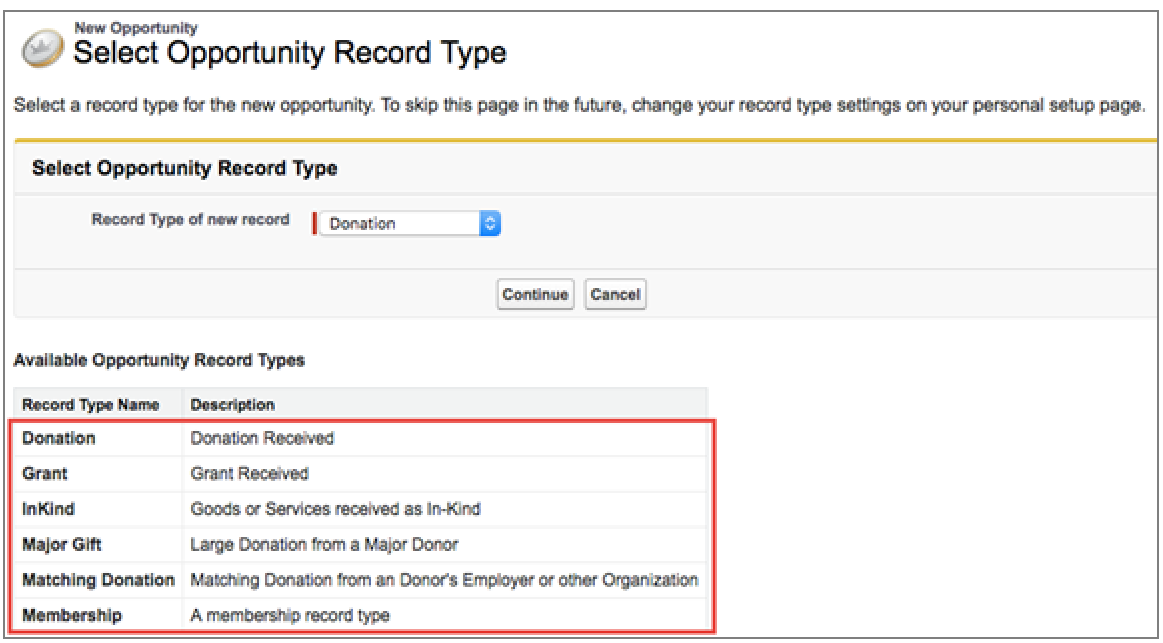
Once you've installed Nonprofit Success Pack successfully in your Production organization, you are ready to begin the post-upgrade steps.

Create Record Types and Assign Page Layouts

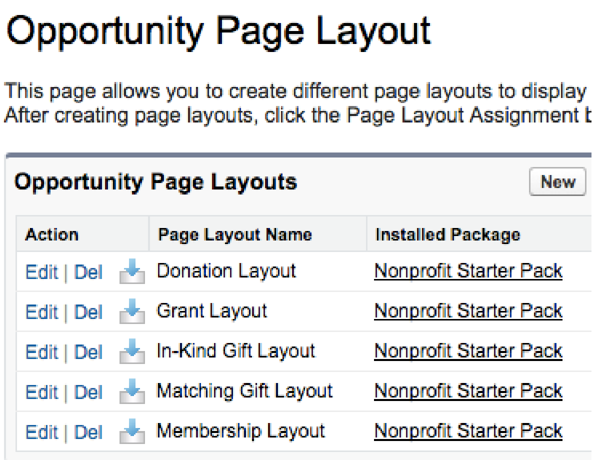
Nonprofit Success Pack Trial organizations include some additional Opportunity record types, in addition to the included page layouts, that you may want to use or adapt in your upgraded organization. If you didn't already have the record types before, you should create them after upgrade.

Remember to create appropriate sales processes for each record type. Sales processes are nothing more than making sure the Opportunity Stages match your business processes. For detailed instructions on creating record types, see Create Record Types in the Salesforce Help & Training.

These are the Opportunity record types you should create or verify after your upgrade:



These are the Opportunity page layouts you see after upgrade. After you've created the appropriate record types you'd like to use (as suggested above), assign these page layouts to those record types. For instructions on assigning page layouts, see Assign Page Layouts from a Customize Page Layout or Record Type Page in the Salesforce Help & Training.



Remove Deprecated Fields

These Opportunity fields have been deprecated and removed in Nonprofit Success Pack and may cause issues with third-party apps if you don't remove them following your upgrade. Even though they have an API name that begins with `npo02__`, you can now delete them like any other field.

- Current Generator(s)
- Delivery/Installation Status
- Main Competitor(s)
- Order Number
- Tracking Number

Before deleting the fields, you need to verify that they don't contain any data.

1. To check whether the fields contain data, use one of the following methods:
   a. Create a custom report for the Opportunity object that includes the fields.
   b. Use the Data Loader to export the Opportunity object (including the fields).

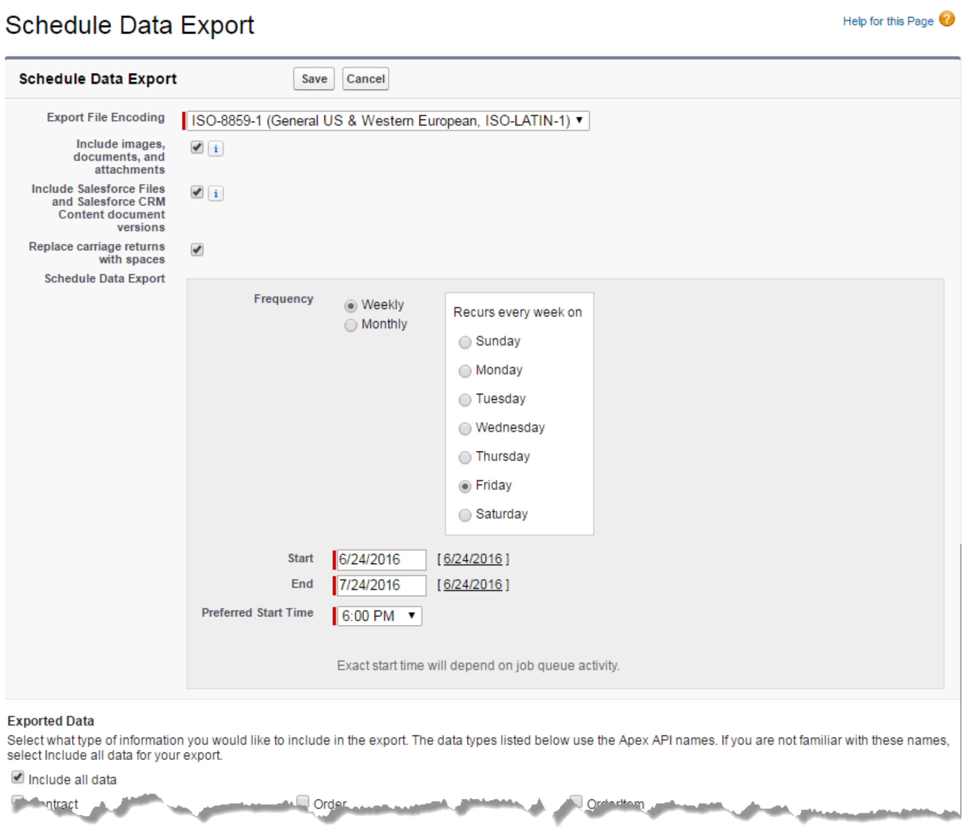
   On the resulting report or file, ensure that these fields are blank for all records.
2. If the fields contain data, create a new custom field and transfer the data to the new field.
3. Delete the fields listed above.

Reset Your Weekly Data Export

Reset your weekly data export to include new Nonprofit Success Pack objects.

1. From Setup, enter *`Data Export`* in the Quick Find box, then click **Data Export** under the Data Management menu.
2. Click **Schedule Export**.

3. Select the desired encoding for your export file.
4. Select **Include images, documents, and attachments** and **Include Chatter files and Salesforce CRM Content document versions** if you would like to include these items in your export data.
5. Choose the frequency, and start and end times for your export.



6. In the Exported Data section, select **Include all data**. If you don't want to include all data, make sure all new objects from the NPSP upgrade are selected.
7. Click **Save**.

See Maintaining an Effective Salesforce Backup in the Power of Us Hub for more information.

Update Page Layouts

Nonprofit Success Pack comes with Contact and Opportunity page layouts that include all the new NPSP fields. You can either use these out-of-the-box page layouts, or customize your existing layouts to include new NPSP fields.

You can see what the Nonprofit Success Pack Contact Layout and Opportunity Layouts look like in the Power of Us Hub.

Evaluate Processes Affected by Account Record Types

In Nonprofit Success Pack, we use Account Record Types. These may be new to your organization as a result of the upgrade. We recommend that you evaluate your Validation Rules, Workflows, formula fields, and integrations to figure out if they need to be Record Type specific.

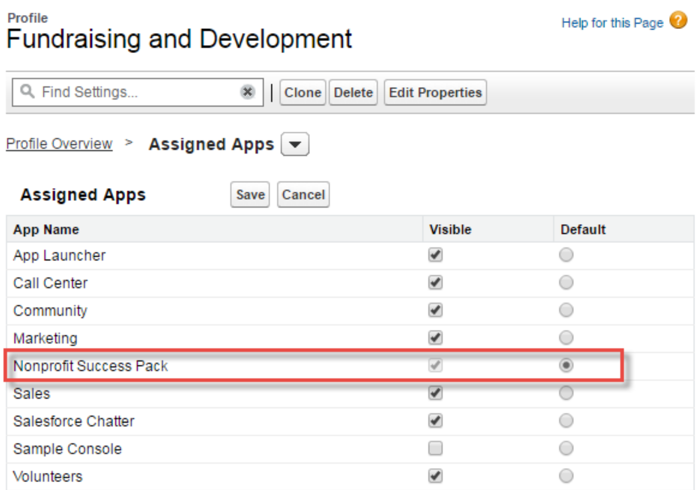
For information on record types, see Record Types in the Salesforce Help & Training.

(Optional) Set NPSP as the Default App

Now that Nonprofit Success Pack is installed in your org, you want your users to be able to easily access it. You can set NPSP as the default app in Salesforce, so that users see Nonprofit Success Pack when they log in for the first time.

Set NPSP as the default app for each profile in your org. Also, if you have Nonprofit CRM (the default app for NPSP 2) in the list of apps, hide it so that users don't get confused.

1. From Setup, enter `Profiles` in the Quick Find box, then click **Profiles** under the Manage Users menu.
2. Click on a profile name.
3. Depending on which user interface you're using, do one of the following:
   a. Enhanced profile user interface—Click **Assigned Apps**, then click **Edit**.
   b. Original profile user interface—Click **Edit**, then scroll to the Custom App Settings section.
4. In the row for Nonprofit Success Pack, select **Default**.



5. If you see Nonprofit CRM in the list of available apps, deselect the **Visible** box.
6. Click **Save**.
7. Repeat the steps above for all necessary profiles.

(Optional) Hide Deprecated Tabs

The NPSP Settings tab has replaced all the various NPSP 2 settings tabs, and clicking them will redirect the user to the new NPSP Settings tab. Hiding the following tabs isn't necessary, but will make a cleaner user interface.

- About Nonprofit Starter Packages
- About Batch Data Entry
- Batch Data Entry Settings
- Affiliations Settings
- Contacts Settings
- Contact Merge (OLD)
- Household Settings
- Opportunity Rollups
- Payment Mappings
- Recurring Donations Settings
- Relationships Settings
- User Rollups

To hide these tabs, edit the Tab settings on all profiles you use in your org.

Note: Temporarily disabling Enhanced Profile User Interface when you edit your tabs will greatly speed up this process. To disable it in Setup, enter `User Interface` in the Quick Find box, then select **User Interface** under the Customize menu.

Batch Data Entry App

You may also have a standalone Batch Data Entry app installed from the Salesforce Foundation. That functionality has been rolled into NPSP, so you can uninstall the old Batch Data Entry app. You'll know you have the old app if you see two Batch Data Entry tabs in NPSP. To uninstall the old app, in Setup enter `Installed Packages` in the Quick Find box, then select **Installed Packages** under the Develop menu. Click **Uninstall** next to the Batch Data Entry app.

Important: Uninstalling the old Batch Data Entry package erases the batch lookup information on records entered through Batch Data Entry.

(Optional) Hide Administrative Tabs from Non-Sys Admin Users

Consider editing tab settings to hide the following NPSP tabs from custom profiles (other than System Administrator). These tabs provide powerful tools and should be used with caution.

- Contact Merge
- NPSP Data Imports
- NPSP Settings

For more information on tab settings, see View and Edit Tab Settings in Permission Sets and Profiles in the Salesforce Help & Training.

Next Steps

Congratulations! You have successfully upgraded to Nonprofit Success Pack. Put your feet up and relax!

Oh, wait . . . you work at a nonprofit. You've probably got work to do! Well in that case, just pat yourself on the back instead. Then, hold a special training or "office hours" for your users to get them familiar with the new fields and layouts. Encourage your users to go through the Manage Fundraising for Nonprofits Trail on Trailhead as well.

Also, remember that Nonprofit Success Pack is updated every two weeks by automatic upgrade. There is more to come with each new release. Join the Power of Us Hub NPSP Release Announcements group for the most current release updates.

APPEXDIX A: TROUBLESHOOT COMMON ISSUES

Here are some common issues that you may experience during upgrade.

- Test Failures
- Code Coverage
- Error Installing Account Record Types Due to Failing Apex Test
- Unmanaged Custom Tab Already Exists
- Advanced Currency Management
- Other Errors

Test Failures

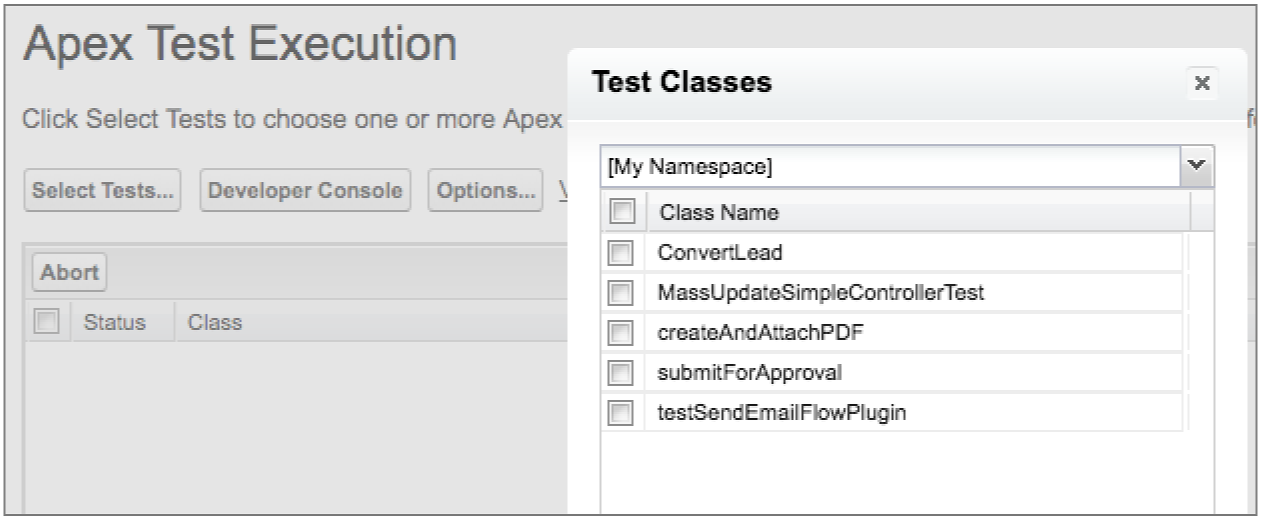
Unit tests are the automated tests that support the code in your org. These tests demonstrate that the code in your org is functioning as it should.

Salesforce requires a minimum of 75% of the lines of code in your org must be successfully tested when you deploy new code in your org. This ensures the overall org health. Most developers strive for even better code coverage than 75%.

These tests are not run when you install Nonprofit Success Pack in a Sandbox org, but they are run when Nonprofit Success Pack is installed in a Production org.

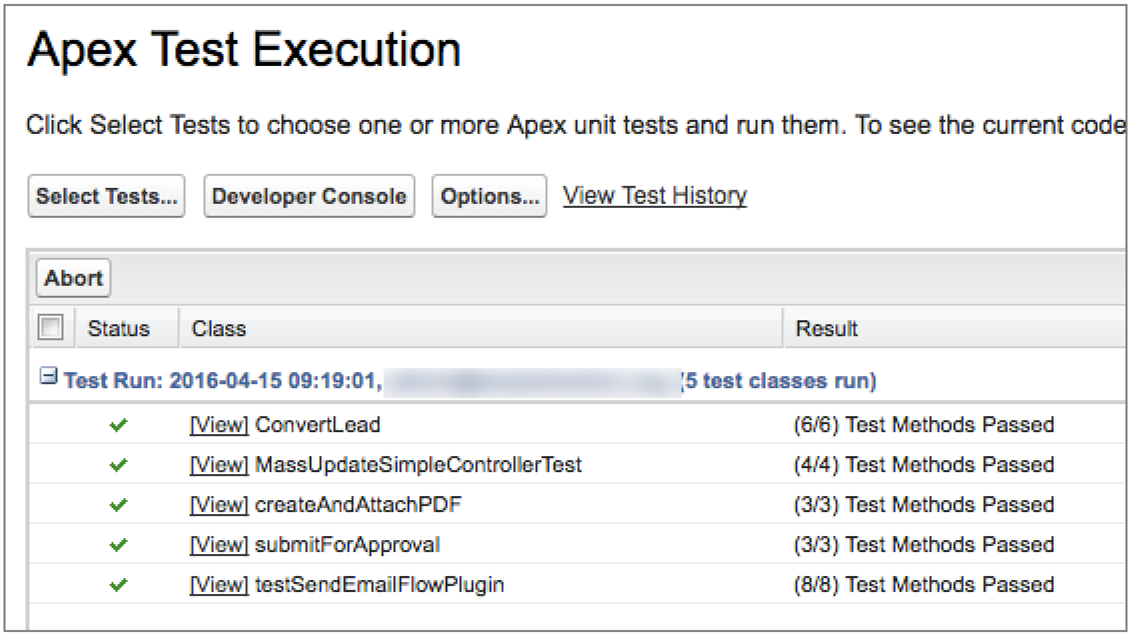
To run these tests in a Sandbox org:

1. In Setup, enter `Apex Test Execution` in the Quick Find box, and click **Apex Test Execution** under the Develop menu.
2. Click **Select Tests…** You will want to focus on those listed under [My Namespace] since they will be the ones run on installation. The tests listed will be unique and custom to your instance.



3. Check all the boxes and click **Run**.

   You'll get a report of any failures. You'll want to see that all tests pass like this:

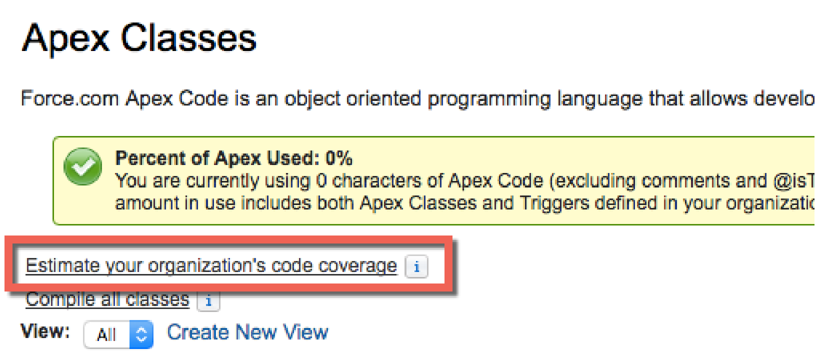


Code Coverage

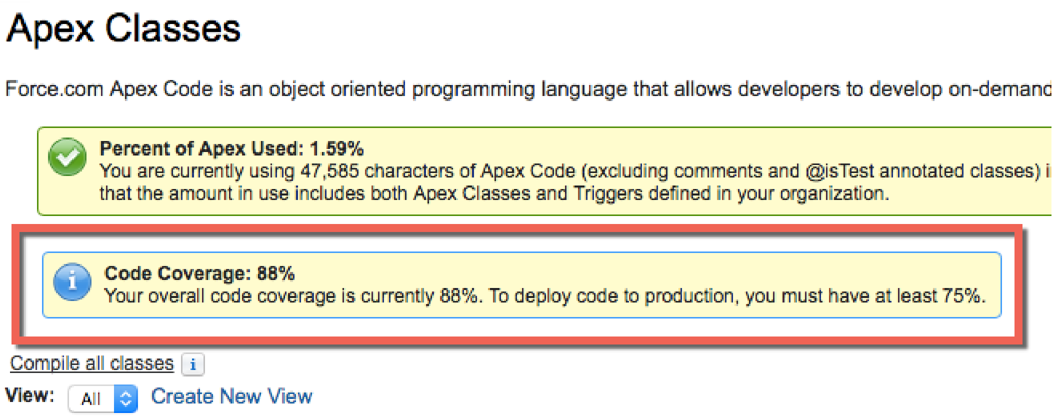
Salesforce requires a minimum of 75% of the lines of code in your org must be successfully tested when you deploy new code in your org. This ensures the overall org health.

To check if you will have a problem with code coverage:

1. In **Setup**, enter `Apex Classes` in the Quick Find box, then click **Apex Classes** under the Develop menu.
2. Click the **Estimate your organization's code coverage** link.



In a few moments, you'll see a percentage amount. Make sure this number is above 75%. If not, you should work with a developer to fix code prior to upgrading to Nonprofit Success Pack in your Production org.



If you see 0% in the results, don't worry! That probably means that you haven't run tests yet. To figure out your code coverage, simply run tests from the Apex Classes page by clicking **Run All Tests**. If you run tests and still see 0%, that just means you don't have custom or unmanaged code in your organization.

Many things can affect the success of these automated tests and your overall code coverage.

- **New Releases**: With each new Salesforce release, there could be changes to the way the code works that cause previously successful tests to fail. The older code in your org might experience test failures because of the many changes to Salesforce since the code was originally created.
- **Older Code**: If you have Apex code that is 5 or more years old, consider having it reviewed and updated by a developer to make sure it is taking advantage of the latest features and to ensure tests continue to run properly.
- **Validation Rules**: If you have restrictive validation rules, these can cause automated tests to fail. For example, requiring parentheses in phone numbers for Contacts and Accounts may cause automated tests to fail. Consider using best practices for validation rules, and potentially inactivating them during the upgrade (and turning them on again once complete).
- **Triggers, Processes, and Workflow rules** sometimes contain code that enforces custom validation rules that can cause tests to fail, so you may need to deactivate these when you install Nonprofit Success Pack. If you still can't uninstall or deactivate code even after deactivating validation rules and other workflow rules, you may need to contact a developer or partner to help you.

Error Installing Account Record Types Due to Failing Apex Test

Most likely you have failing Apex tests. See the section on Unit Tests for help analyzing your code and test coverage.

In the meantime, you can install NPSP using a workaround.

1. Create an Opportunity Record Type, if one doesn't already exist in your organization.
2. Create a Household Account Record Type. Use these values:
   - `Record Type Label`: Household
   - `Account Record Type Name`: HH_Account
   - Check the **Active** checkbox
3. Go to GitHub releases page and install the latest release not marked "Beta" or "Pre-Release."

Until you resolve your Apex test failure issue, you won't be able to the install the Salesforce1 Config package. You can still use NPSP, you'll just be missing some functionality for mobile applications.

Unmanaged Custom Tab Already Exists

The installer is trying to install a tab that already exists in your organization. To fix this error, you must delete the tab. Don't worry though, the installer will add it back again.

Note: Before you delete the tab, note any list views you have created related to this tab so that you can recreate them after you upgrade.

To delete a custom tab:

1. From **Setup**, enter `Tabs` in the Quick Find box, then select **Tabs** under the Create menu.
2. Look for the name of the tab mentioned in the error message.
3. Click **Del** next to the tab. Note that this only removes the tab, but not the related data.

4. Run the installer again.

Advanced Currency Management

Nonprofit Success Pack will not install in an organization that has Advanced Currency Management (ACM) enabled. You will need to disable ACM to upgrade.

For further information, see the International Nonprofit FAQ on the Power of Us Hub

Other Errors

You may encounter other errors that aren't listed in this document.

If you do, please post in the Upgrading to latest NPSP group in the Power of Us Hub.