



CONSTITUENT CONVERTER FUNCTIONAL SPECIFICATION

March 8, 2018

Table of Contents

1. Solution Overview 2

2. Deployment 6

3. Configuration 6

4. Security folder 6

1. SOLUTION OVERVIEW

Using Blackbaud CRM, you might find that constituent records were created – either through a conversion, a batch, or manual entry – as organization records when they should have been individual records or individual records that should have been organizations. Currently, there is no out-of-box functionality to convert records. One is left then to either keep these records as they are or delete them and recreate the records as the appropriate record type.

Zuri Group has developed a simple customization that can be installed into your CRM instance that will convert an organization record into an individual record or an individual record into an organization record. The customization includes a task that can convert the organization/individual record right in the detail view of the record, as shown in Figure 1 and 1.1.

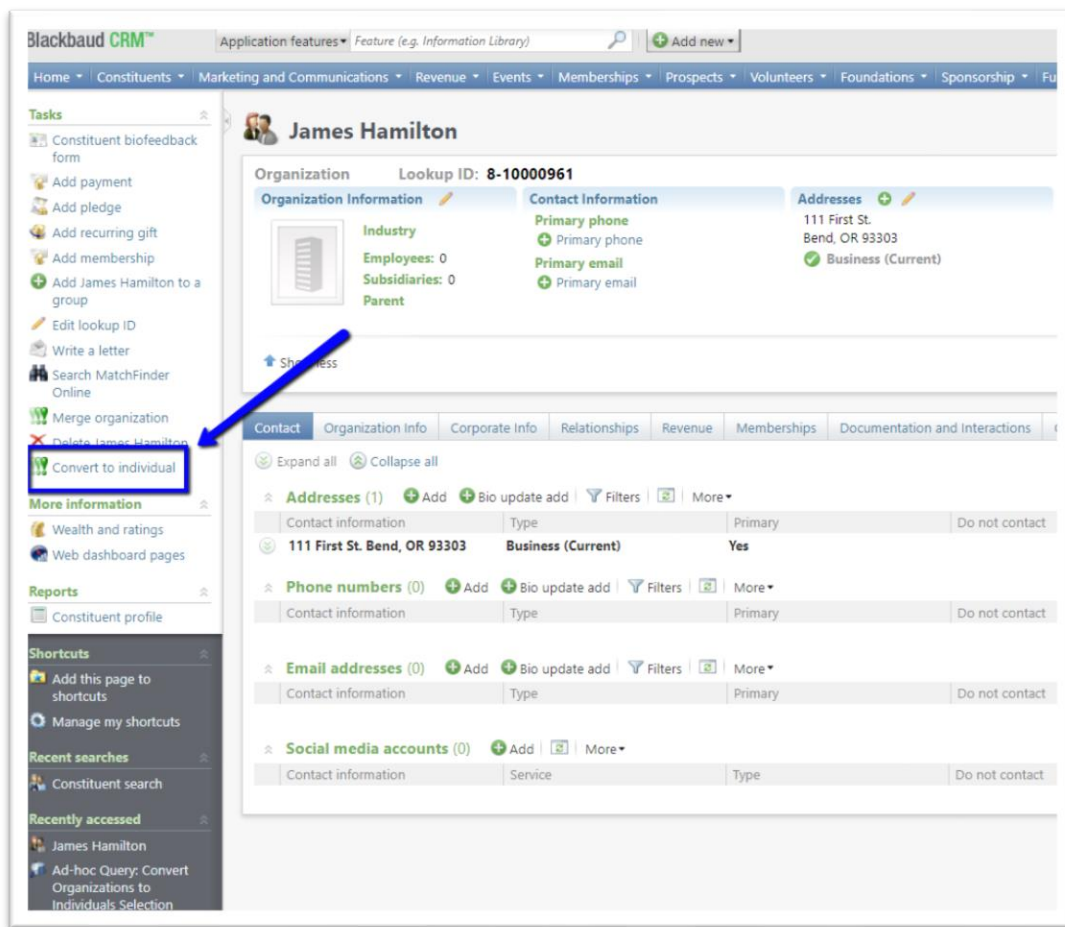


Figure 1 – Convert to individual task in record view

The screenshot displays the Blackbaud CRM interface for a constituent record. The top navigation bar includes 'Home', 'Constituents', 'Marketing and Communications', 'Revenue', 'Events', 'Memberships', 'Prospects', 'Volunteers', 'Foundations', and 'Sponsorship'. The main header shows the constituent's name 'Susan Arrington' and 'Lookup ID: 8-10000962'. Below this, there are sections for 'Personal Information' (Name: Susan Arrington, Nickname, Maiden) and 'Contact Information' (Primary phone, Primary email). A 'Tasks' sidebar on the left lists various actions, with 'Convert to organization' highlighted by a blue box and a blue arrow pointing to it. The main content area shows a 'Revenue summary' table and a 'Recent and upcoming activities' section.

Revenue summary		View all revenue
Total revenue:		\$0.00
Membership revenue:		\$0.00
Event revenue:		\$0.00

Figure 1.1 – Convert organization task in record view

The customization also provides a global change that can convert organization/individual records in a constituent selection, as shown in Figure 2 and 2.1.

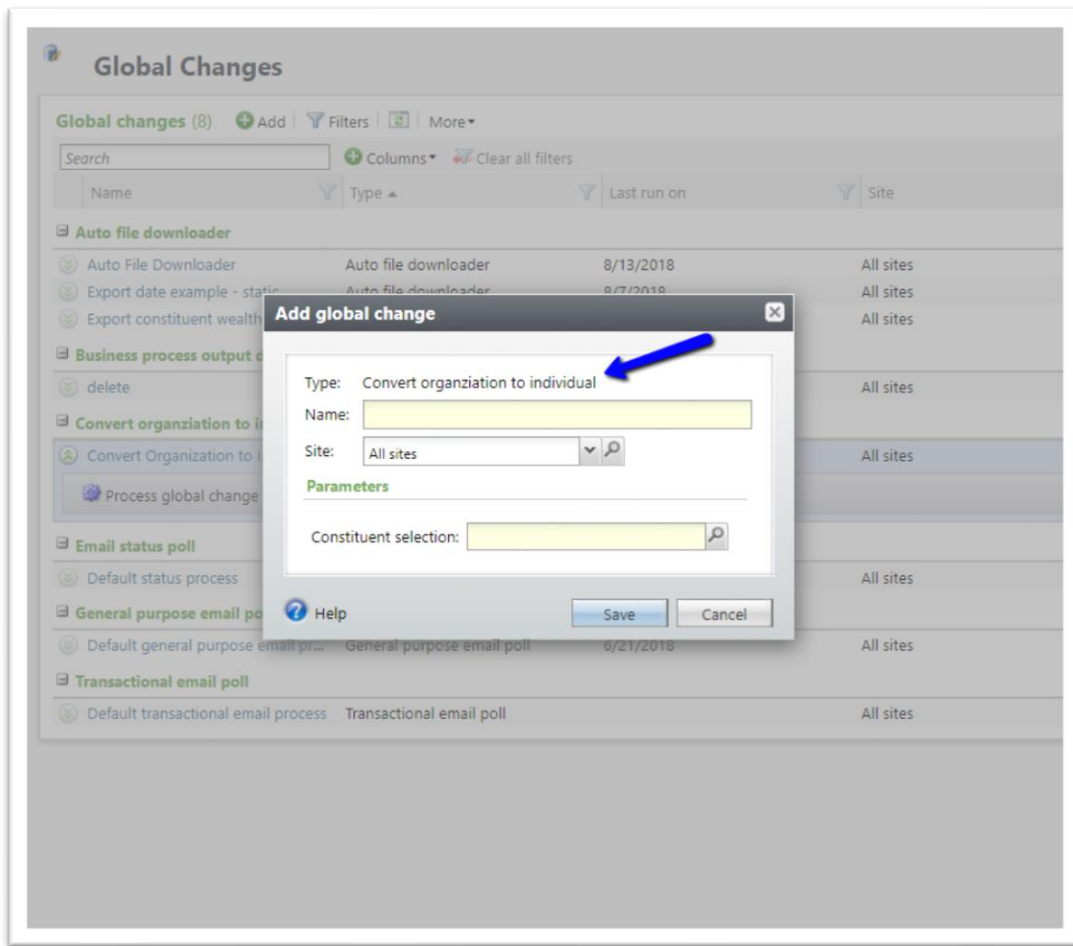


Figure 2 – Convert to individual global change

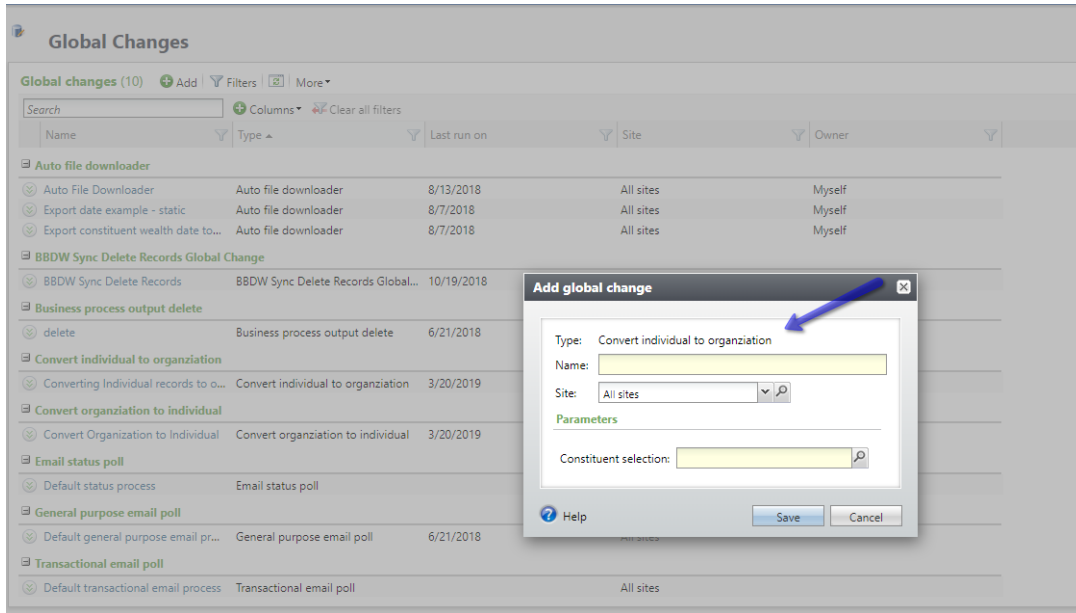


Figure 2.1 Convert to organization global change

When an organization record is converted to an individual record, the organization name will be parsed into the First Name and Last Name, where anything before the first space in the name will be put into the First Name and everything after the first space will be put into the Last Name.

For example:
Organization name: James Hamilton Esq.
 will convert into
First name: James
Last name: Hamilton Esq.

Here are other name parsing examples to consider when an organization record is converted into an individual record.

Organization name		First name	Last name
James Hamilton	→	James	Hamilton
Hamilton Inc.	→	Hamilton	Inc.
Hamilton	→		Hamilton
James Hamilton Inc.	→	James	Hamilton Inc.
JamesHamilton	→		JamesHamilton

When an individual record is converted to an organization record, the individual name will be parsed into the Org Name field.

For example:
Individual last name: Services
First name: Miller

will convert to

Organization name: Miller Services

It is important to remember that while the record type is converted the data is not touched and remains intact. It is likely that data clean up on the record will need to take place. It is the best practice to review the constituent record and clean up extraneous data.

Zuri Group is offering this customization to Blackbaud CRM customers (version 4.0 or later) who could make use of the functionality. The customization can be downloaded from ZuriGroup.com.

2. DEPLOYMENT

Place the following files in their corresponding location.

ZuriGroup.CustomFx.ConstituentConverter.Catalog.dll	bbappfx\vroot\bin\custom
-----------------------------------------------------	--------------------------

3. CONFIGURATION

1. Load the “Constituent Converter Package” from the ZuriGroup.CustomFx.ConstituentConverter.Catalog using the catalog browser functionality from within BBCRM

4. SECURITY FOLDER

Constituent