Constituent Page Upgrade Utility for Blackbaud CRM

In version 4.0, we made several enhancements and added new features to constituent pages. We replaced the constituent summary with interactive summary tiles. Application users can individually choose the tiles they want to view and reorder them to fit their own needs. Many of these tiles include links, which make it easier to navigate to related tabs on the record or to other related records and pages.

Additionally, we introduced a second tier of tabs, which allowed us to move related tabs into groups. We also reduced the number of links on the left side of the page. Some pages that you previously accessed from **More information** or **View as** are now tabs or groups of tabs on the constituent record. For more information about these constituent page and tab enhancements, review the Constituents section in the [Blackbaud CRM 4.0 New Features Guide](#).

What pages have moved?

Many constituent pages have moved and will be checked by this utility. Customizations for any of these pages will likely be impacted.

- Affiliated Education History Page
- Bank Page
- Committee Member Page
- Committee Page
- Community Member Page
- Constituent Correspondence Page
- Constituent Documentation Page
- Constituent Funds Received Page
- Constituent Group Memberships Page
- Constituent History Page
- Constituent Interactions Page
- Constituent Revenue Information Page
- Constituent Vendor Page
- Corporate Structure Page
- Extended Network Page
- Fundraiser Page
- Grantor Page
- Patron Sales Orders
- Prospect Page
- Registrant View Page
- Relationship Map Instances Page
- Sponsor Page
- Stewardship Plans Page
- Surveys Page
- Volunteer Page

Why should I use this utility?

We recommend you run this utility after you upgrade to version 4.0 or higher if you have customizations on pages that we have consolidated.

If you do not want to use this utility, you can move the customizations manually instead. However, the utility can save you time.

What does this utility do?

The utility detects customizations and, when possible, moves them to the appropriate, comparable location. For example, all revenue-related information has been consolidated on a single Revenue tab with multiple second-tier tabs on the constituent record. Prior to version 4.0, if you had a customization on the Revenue History tab, the customization will now be moved to the new location of the Revenue History second-tier tab on the Revenue tab.

When the customization cannot be moved automatically, the customization is skipped.

For new custom sections you have added to existing tabs or to new tabs, the utility:

- Will not detect these to display in the list when you click "Detect Customizations"
- Will report these new sections in the output of the utility

For customizations to out-of-the-box sections, the utility:

- Will detect these to display in the list when you click "Detect Customizations"

The utility may be unable to detect certain types of customizations, including added, changed, or removed:

- Actions
- HelpKey properties
- DependentSections
- SectionContext

What do I need to run this utility?

- Access to the SQL Server that you use to access the database
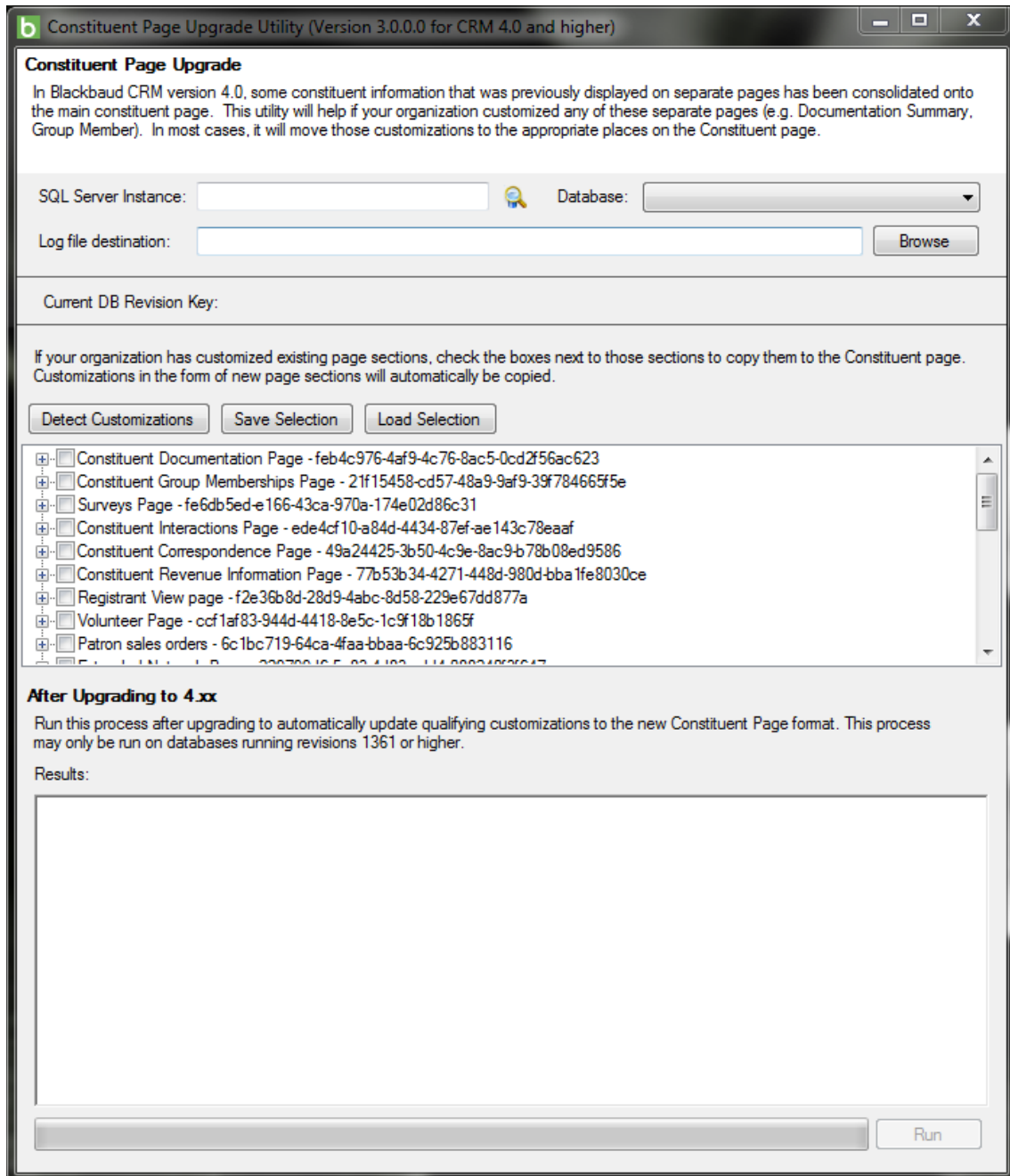- The *Blackbaud CRM* installation must be upgraded to version 4.0 or higher

Where can I get this utility?

You can access the utility from the *Blackbaud CRM* Downloads page on the Blackbaud website.

How do I use this utility?

1. Upgrade to *Blackbaud CRM* version 4.0 or higher.

2. Save the utility to your computer. Make sure your computer has access to the SQL Server instance containing the **Blackbaud CRM** database.

3. Run the executable. The Constituent Page Upgrade Utility screen appears.

4. Enter the name of your SQL Server instance.

5. Select your database.

6. Enter an output destination for the log file where the results will be stored.

7. You can click **Detect Customizations** to view a list of customizations the utility was able to detect. If you know your customizations, you can create a list and click **Load Selection** instead.
8. Mark the customizations you want the utility to copy to the upgraded constituent page.
9. You can click **Save Selection** to save a file with the customizations you have marked. You can use this file again later to copy the specific list of your customizations, including the ones you have marked. For the purposes of testing the results of the utility in *Blackbaud CRM*, you can save multiple versions of this list for re-use.
10. You can click **Load Selection** to load a previously saved list of your customizations, including the ones you have marked. If you click **Detect Customizations** again, the list will be refreshed and no customizations are selected. However, if you have saved a list, you can re-load it.
11. After you mark the customizations you want the utility to copy to the upgraded constituent page, click **Run**. The utility checks for customizations on the affected constituent pages. When possible, it moves the customizations to appropriate places on the upgraded constituent page.
12. Review the results. The results indicate which customizations were moved and where they were moved. They also indicate which customizations were skipped and why.
13. Do any additional steps that you would normally do after you update a customization. For example, you may need to refresh the shell navigation.
14. To verify that the utility moved customizations in the way you expected, access a constituent record in *Blackbaud CRM*. Explore the constituent's record to check the navigation.

Messages when you run the utility

When you click the Run button:

No sections are marked to copy. Do you want to continue?

> This message appears when you click **Run** but you have not marked any sections for the utility to copy. This means no sections will be copied over to the upgraded constituent page.

When you click the Detect Customizations button:

Please specify a database.

> This message appears when you click **Detect Customizations** but you have not specified a database. The *Blackbaud CRM* database must be specified in order to run the utility.

This process may take a few minutes. This will clear your current selections. Continue?

> This message appears when you click **Detect Customizations**. When you click this button, the utility attempts to detect your customizations. The list of customizations is refreshed so any customizations you had previously marked will need to be selected again. You can click **Cancel**

to save the current list of marked customizations you want to copy over to the upgraded
constituent page, if you want to re-use it again later.

Customizations detected and marked.

This message appears when you click **Detect Customizations**. The detected customizations
appear in the list. You can mark which one you want to copy over to the upgraded constituent
page.

Unable to detect customizations.

This message appears when you click **Detect Customizations** the utility is not able to detect any
customizations. You can check the settings you selected for the utility, including the *CRM*
database, and click the button again.

The utility may be unable to detect certain types of customizations, including added, changed,
or removed:

- o Actions
- o HelpKey properties
- o DependentSections
- o SectionContext

When you click the Load Selections button:

Failed to load the selections file. Incorrect number of columns detected on line {0}.

This message appears when you click **Load Selections** but the file has an incorrect number of
columns on one or more rows, where {0} represents the number of the row. You can check the
file manually to make sure it contains the exact information as described in the "Saved List of
Selected Customizations" section of this document.

Failed to parse the (first | second | third) column "{0}" on line {1}. The column was not a GUID.

This message appears when you click **Load Selections** but the file has an invalid GUID in one or
more rows, in one or more columns. {0} represents the invalid GUID value found in a column. {1}
represents the row with the invalid GUID value. You can check the file manually to make sure it
contains the exact information as described in the "Saved List of Selected Customizations"
section of this document.

Saved List of Selected Customizations

When you save a list of the customizations you want to copy over to the upgraded constituent record, it is saved in a *.CSV format. You can also create a list to use on your own; however, the list must meet these requirements.

- It must be a *.CSV file with a comma as the separator.
- Each row must have exactly three columns containing only GUIDs. Each row represents a single customization section to be copied over to the upgraded constituent page.
- The first column is the ID of the page which contains the customization section to be copied.
- The second column is the ID of the tab which contains the customization section to be copied.
- The third column is the ID of the section to be copied.
- Blank rows are ignored.

The utility skipped my customization. What should I do?

The results indicate why the customization was skipped. You can update the customization to correct the issue and re-run the utility. The utility detects customizations that were previously skipped and, when possible, moves them to the appropriate places on the upgraded constituent page.

ERROR: Summary section customization SECTIONCAPTION (SECTIONID)—Summary Section View Form does not have RECORDTYPE record type.

In this case, the Summary Section View Form did not have the correct record type in order for the utility to be able to move it.

- The Volunteer page must have the Volunteer record type.
- The Patron page must have the Patron record type.
- The Bank page must have the Bank record type.
- All other pages must have the Constituent record type.

In this case, you can change the record type of the custom summary section and re-run the utility or you can manually move it to the Constituent page.

ERROR: TABCAPTION tab (TABID) on PAGENAME could not be moved due to existing second-tier tabs.

This error occurs when a custom tab was going to be moved to a subtab of an existing tab on the Constituent page; however, only two levels of tabs are supported. You can remove the subtabs from the custom tab and re-run the utility or you can manually move it to the Constituent page.

ERROR: Tab destination for parent tab ID: TABID could not be located.

This error occurs when the custom tab or summary section was going to become a subtab on an existing tab on the Constituent page; however, the existing tab is missing. You can re-add the existing tab to the Constituent page and re-run the utility or you can manually move it to the Constituent page.

ERROR: Action group GROUPCAPTION for the custom action could not be located.

This error occurs when a custom action was going to be moved from an action group on a page to a corresponding action group on the Constituent page; however, the action group on the Constituent page cannot be found. You can re-add the action group to the Constituent page and re-run the utility or you can manually move it to the Constituent page.

ERROR: Parent tab TABNAME (TABID) for custom section could not be located.

This error occurs when a custom section was going to be moved to an existing top-level tab on the Constituent page; however, the existing top-level tab cannot be found. You can re-add the tab to the Constituent page and re-run the utility or you can manually move it to the Constituent page.

ERROR: Destination tab TABCAPTION (TABID) could not be located.

This error occurs when a custom section was going to be moved to an existing subtab on the Constituent page; however, the existing subtab cannot be found. You can re-add the tab to the Constituent page and re-run the utility or you can manually move it to the Constituent page.