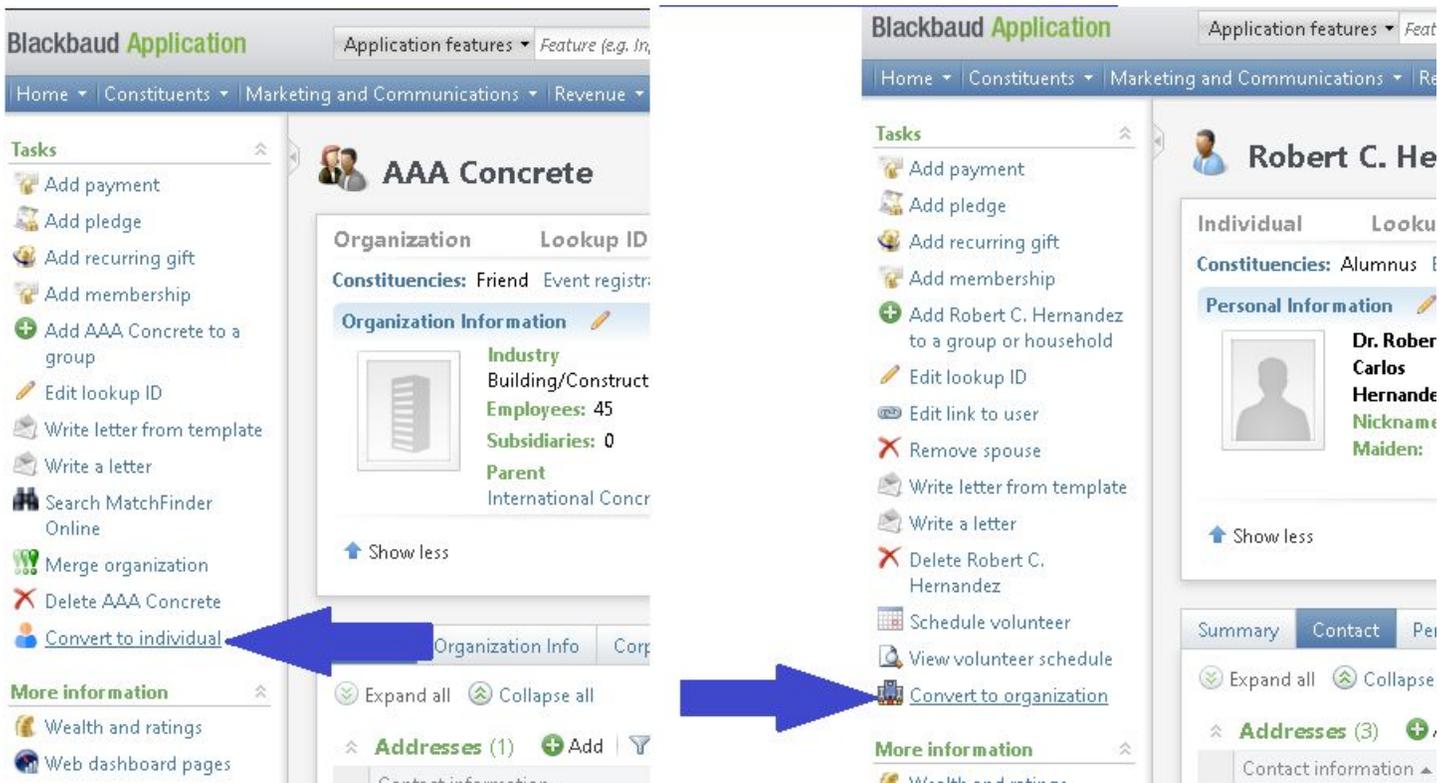




Individualization

Product Overview

Individualization enhances Blackbaud CRM with the ability to change individuals into organizations, and vice-versa. In doing this, it resolves the #1 rated customer suggestion in the Blackbaud Idea Bank.



Instant, Reversible, and Lossless

Converting takes less than a second, even for complex data scenarios. Change a constituent's organization status by accident? Don't worry - you can instantly toggle the constituent back with no harm done. And speaking of reversal, don't worry about data loss - data that depends on the constituent type (like number of employees, for example) is safely preserved in case you want to switch back.



Clean up the mess

Do you have legacy data that is wrongly encoded? Individualization includes two Global Changes, which can target an entire selection of constituents, and magically turn them all into organizations or individuals. Clean up data conversion issues that have been there in years - in just a few seconds.

The screenshot displays the 'Global Changes' section of the software. The main window title is 'Change test organizations into Individuals'. Below the title, there are tabs for 'Recent Status', 'History', and 'Job Schedules'. The 'Recent status' tab is active, showing a 'Completed' status with a green checkmark. The status message is 'Completed'. The process was started by 'SSC-DEVJ.R. Styons' on 1/16/2021 at 1:01:47 AM and ended at 1:01:48 AM, taking 1 second to complete. The server name is 'SSC-DEV', and 1000 records were processed with 0 exceptions. 1000 records were successfully processed.

An 'Edit global change' dialog box is open in the foreground. It contains the following fields:

- Type: Change organizations into individuals
- Name: Change test organizations into Individuals
- Site: All Sites (dropdown menu)
- Parameters section:
 - Selection: Test orgs (Ad-hoc Query) (dropdown menu)

The dialog box also includes a 'Help' button with a question mark icon, and 'Save' and 'Cancel' buttons at the bottom right.



Custom Constituency Rules

Enforce the constituency policies and practices of your organization automatically with constituency rules. Easily create rules that are automatically applied whenever you use the conversion feature. Review and change the rules in an easy-to-use interface.

Individualization Constituency Rules

Organization to Individual (3) + Add [Icons]

Constituency	Action to take	Change to	Active	System	Execution or...
Former organization	Create it		✓		1
Corporation	End date it		✓		2
Trustee	Replace it with a different constituency	Board member	✓		3

Individual to Organization (4) + Add [Icons]

Constituency	Action to take	Change to	Active	System	Execution or...
Former individual	Create it		✓		1
Board member	Replace it with a different constituency	Trustee	✓	✓	2
Grandparent	Delete it		✓		3
Employee	Replace it with a different constituency	Former individual	✓		4

Edit rule: Organizations becoming Individuals

For this constituency: Corporation

Take this action: Replace it with a different constituency

New constituency: Former organization

Create reverse rule for orgs to individuals

Save Cancel

Read more

[Check out the documentation](#), and, when you're ready, [purchase Individualization](#) for **your** organization.