

Change Log

A record of notable maintenance and configuration changes made to the CBM **production** CRM. The **test/dev** instance (`crm-test.clevelandbusinessmentors.org`) is the source of truth for configuration; production is kept in sync with it.

2026-06-24 — Production brought into parity with test/dev

A review found several differences between the production CRM and the canonical test configuration. Production was reconciled to match. User-visible results:

- **Create/edit forms are complete.** The Contact and Mentor Profile forms were missing fields; all fields now appear and accept input.
- **Field and relationship names corrected.** A few custom fields and links had slightly wrong internal names (a missing or duplicated leading letter); these were corrected so data and relationships line up with test.
- **One-to-one relationships restored.** Several links that should connect to a *single* record (e.g. a Mentor Profile to one Contact, an Account to one Primary Contact) had become "to-many"; they were restored to single-record links.
- **Mirror fields restored.** Read-only fields that display a value from a linked record (e.g. a mentor's Contact City / Phone / Personal Email) were recreated.

All custom entities now match test for fields, relationships, and forms. The CRM Builder tool that deploys configuration was also corrected, so future updates carry these names and relationships faithfully and won't reintroduce the differences.

“ Configuration changes are made on **test** first, then applied to production — never directly on production except for one-off corrections like this one.

Revision #1

Created 2026-06-25 03:03:35 UTC by Admin

Updated 2026-06-25 03:03:35 UTC by Admin