

Mobile Access Guide

05/15/2012 Blackbaud CRM 2.93 Mobile Access US

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Blackbaud Mobile

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With mobile access, you can extend the reach of your Blackbaud applications built on the Infinity Platform. For example, you can check KPIs for up-to-the-minute numbers or view prospect information and file contact reports from the road.

Access Blackbaud Mobile

You don't need to install anything on your mobile device; all you need is a browser.

Note: The user must be in a system role that has the Mobile endpoints feature permission granted .

► Access Blackbaud Mobile

1. To access Blackbaud's mobile services from your mobile device, go to your Blackbaud Infinity application start page. Typically, this is at `http://[Your server name]/[IIS virtual directory name]/Browser/StartBrowser.htm` or `https://[Your server name]/[IIS virtual directory name]/Browser/StartBrowser.htm`.
2. Click **Mobilize**. If your mobile device is recognized, you will be prompted to log in and will see the mobile services available. Your login credentials are your user name and password for the Blackbaud Infinity application. Also, your application user must be in a system role that has the Mobile endpoints feature permission granted.

Note: If your device isn't recognized or if you access the Mobilize page from a personal computer, you will see a list of endpoints for the mobile services available.

Available Services in Blackbaud Mobile

Constituents Near Me

This feature allows you to view a list of constituents within a specified radius, using the GPS capability of your mobile device. You can enter the radius and it searches the addresses of constituents to determine which ones are located near you. You must have mapping functionality enabled and the constituent addresses must have geocodes in order to be included.

KPI Dashboard

This feature allows you to view a list of KPIs and their values. Any KPI you have rights to access in the Infinity product is available from your mobile device.

Mobile Query

This feature allows you to view a list of queries which have been mark **Make this query available in Mobile Query** on the Options tab of the query properties screen. Once marked as “mobilized,” any query you have rights to access in the Infinity product is available from your mobile device.

Mobile Major Giving

This feature allows you to access your major giving fundraising data. You can view your prospects, plans, and steps, as well as file contact reports from your mobile device.