

# Blackbaud CRM Mobile Guide

03/21/2013 Blackbaud CRM 3.0 Blackbaud CRM Mobile US

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# Blackbaud CRM Mobile

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With *Blackbaud CRM Mobile*, you can extend the reach of *Blackbaud CRM* features and capabilities to a mobile environment. From a mobile device, you can search for and update constituent records, check KPIs for up-to-the-minute numbers, or view prospect information and file contact reports all while on the go.

## Access Blackbaud CRM 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 Access Mobile Features System Privilege feature permission granted.

### ► Access Blackbaud CRM Mobile

1. To access *Blackbaud CRM Mobile* features from your mobile device, go to your *Blackbaud CRM* start page.
2. Click **Mobilize**. Your login credentials are your user name and password for *Blackbaud CRM*. In addition, your application user must be in a system role that has the Access Mobile Features System Privilege feature permission granted. When your web browser is accessed and recognized from a mobile device, the available mobile features display.

**Tip:** We recommend administrators communicate the *Blackbaud CRM Mobile* url to users in your organization. For more efficient access, we recommend users bookmark the url on a mobile device.

**Note:** If your device isn't recognized or if you access the Mobilize page from a personal computer, a list of urls for the available mobile features displays.

## Available Features in Blackbaud CRM Mobile

### Constituents

With this feature, you can search for, view, and edit constituent records from your mobile device. Click **Constituent Search** to search for constituent records. You can search by constituent name or lookup ID, city, state, and zip code information. You can also view a list of recently accessed records as well as records marked as favorite. Any recently accessed record added through *Blackbaud CRM Mobile* or *Blackbaud CRM* displays in the Recently Accessed list. To select a record as favorite, from a constituent record, click the star next to a constituent name. When you add a favorite for a constituent record in *Blackbaud CRM Mobile*, it displays as a shortcut in *Blackbaud CRM* (and visa versa).

## Prospects

With this feature, you can search for and view prospects, plans, and steps; edit information such as prospect status and pending steps; and file contact reports from your mobile device.

## Lists

This feature allows you to view a list of queries which have been marked **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 **Blackbaud CRM** is available from your mobile device.

## KPI Dashboard

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