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Available Features in Blackbaud CRM Mobile

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 some constituent information 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.