Method CRM

Evaluation / Reviewers Guide

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1. Overview

What is a "Method CRM Evaluation / Reviewers Guide"?

It is intended to be a quick and easy introduction to installing Method and preparing you for your evaluation of our product for use with QB Desktop. Of course, it is no substitute for being guided by a real human being – so keep in mind that we are always just a phone call (toll free 1-888-925-6238),or email (method@methodintegration.com) away. We are here to help!

What is Method CRM?

Method is a QuickBooks-integrated, web-based CRM also serving as a platform with industry-specific applications that can be completely customized from head-to-toe. We start you off with a web-based version of your QuickBooks data, complete with Customer, Vendor and Employee details. Changes made in either QuickBooks or Method are synchronized in real time. Customize each screen any way you want. Create your own screens, tables, fields, actions and customer portals, using a simple drag and drop interface. No coding!! It's the last system your company will need to invest in since Method can be customized to meet your company's specific needs now and far into the future.

2. Installing the Method Integration Engine

Note: if you get stuck at any point during the installation, give us a call at 1-888-925-6238 option 2.

1. Choose a computer that is rarely turned off, and is usually logged into *QuickBooks* with Administrator permissions.

2. Open QuickBooks to the company file you want to sync your Method account to.

   Note: Make sure you select the correct QuickBooks company file. Once you link a QuickBooks company file to a Method account, you cannot easily link a different company file without having to create a brand new account.

3. Sign into your Method account by going to http://www.methodintegration.com and clicking the *Sign In* link.

4. Click on the *QuickBooks* tab.

5. Under the *Connect QuickBooks to your account* section, step 3, click the *Install now (click here)* link.

6. Download and install the Method Integration Engine by following the on-screen steps. Be sure to install both QBFC and the Method Integration Listener.

7. Once the installation is complete, you should be viewing the *Method Integration Engine* window.

   *Note: If the Method Integration Engine is not open, click **Start > Programs > Method > Method Integration Engine for Use with QuickBooks**.*
   If the Method Integration Engine is not visible, right-click on the *icon in your taskbar next to the clock in the lower right-hand corner of your screen, and click Display.*

8. Enter your *Method Account*, *User Name* and *Password*.

9. Click **Connect**.

10. When prompted by QuickBooks, choose the 'Yes Always...' option.

11. Wait until the full synchronization process completes.

12. Close and reopen QuickBooks on this computer. *This is an important step. If you do not perform this step, the real time synchronization will not occur.*

13. Repeat steps 2 through 12 for all other computers that use QuickBooks. *This step will set the other computers to be "OnDemand From Desktop" mode so that changes made in QuickBooks sync automatically to the web.*

3. Simple A-to-B tutorial

As you add customers, modify invoices, or delete time tracking entries, Method PUSH™ technology instantly updates QuickBooks. Your web browser doesn't even need to be on the same computer as QuickBooks. For now, we'll go through a few simple examples of adding a new customer, a new lead and posting an invoice that is immediately sent to QuickBooks.

Adding a new Customer

1. Click **Customers**.

2. Click **New Customer**.

3. Enter Customer info.

   Enter *First Name*

   Enter *Last Name*

   Enter *Phone*

4. Click **Save**.

5. Go to QuickBooks and notice the new customer has been sent in real time.

Adding a new Lead

1. Click **Leads**.

2. Click **New Lead.**

   Tip: normally you determine if the lead / customer already exists by doing a quick search before you enter them into the system.

3. Enter Lead info.

   > Enter *First Name*

   > Enter *Last Name*

   > Enter *Phone*

4. Click **Save.**

5. Open QuickBooks and notice the lead is now found in Method but has <u>not</u> been sent to QuickBooks just yet.

   Tip: You don't need to fill your QuickBooks file with potential customers ("leads"). By using the leads feature, new customers entered in Method don't sync to QuickBooks until you are ready.

Adding a new Invoice for a Lead Status Customer

1. Click **Leads and Contacts Lists.**

2. Click 'Go To...' for the lead to invoice. In *this c*ase *we will use* the Lead from the above example.

3. Navigate to the Transactions section.

4. Click **New Transactions**.

5. Select ***Invoice.***

6. *Enter o*ther *Invoice det*ails.

7. Enter info for the details section of the Invoice.

   > Select a *Service Date*

   > Select the *Item*

   > Adjust the Quantity, Rate, and Tax as desired

8. Repeat step 5 for any additional Invoice Line Items.

9. Notice the 'Wait for Sync Approval' feature is enabled by default for leads. Uncheck this to send the Invoice and Lead to QuickBooks.

10. Click **Save**.

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11. Go to QuickBooks and notice the Lead and Invoice have now been posted to QuickBooks in real time.

The Lead was not to posted to QuickBooks until it was referenced by a transaction or other list, in this case the Invoice.

4. QuickBooks Integration FAQ

Q1: Why can't I do a Changes-Only synchronization on computers other than the 'main' computer?

A1: Limiting Changes-Only and Full Synchronization to a single computer eliminates the possibility of two computers synchronizing the same data between QuickBooks and the server at the same time. This reduces your network traffic, the number of requests made to QuickBooks, bandwidth between your network and the server, as well as prevents database records from being edited by multiple synchronizations at the same time.

Q2: How do I change the computer I use as the 'main' synching computer?

A2:

a) Confirm you have the correct company file open in *QuickBooks*.

b) In *Method* click the *QuickBooks* tab.

c) Under the *Edit Synchronization Preferences* section, click **Reset** beside *Computer to Sync With*.

d) Click **Save Changes**.

e) On the computer you want as the new 'main' synching computer, install the Method Integration Engine and run a full synchronization.

Q3: How do I reset my account and use a different QuickBooks file?

A3: When you sync your QuickBooks company file to your Method account the company file and the account are bound together. You cannot reuse an account on a different QuickBooks company file without causing data conflicts and inconsistencies. If you need to sync a second company file, you'll need to open a second account.

Q4: I have renamed my QuickBooks company file, but it is otherwise the same. How do I allow my Method account to sync with this?

A4:

a) Confirm you have the correct *QuickBooks* company file open.

b) In *Method* click the *QuickBooks* tab.

c) Under the *Edit Synchronization Preferences* section, click **Reset** next to *QuickBooks file*.

d) Open the *Method Integration Engine*.

*Note: If the Method Integration Engine is not open, click **Start > Programs > Method > Method Integration Engine for Use with QuickBooks**.*

If the Method Integration Engine is not visible, right-click on the *icon in your taskbar next to the clock in the lower right-hand corner of your screen, and click Display.*

e) In the *Method Integration Engine* click **Connect**.

Q5: What version of QuickBooks do I need in order to use Method?

A5:

US versions of QuickBooks Pro/Premier/Enterprise 2004 or higher

Canadian versions of QuickBooks Pro/Premier/Enterprise 2008 or higher

UK versions of QuickBooks Pro/Premier/Enterprise 2008 or higher

Australia versions of QuickBooks Pro/Premier/Enterprise 2008 or higher

Note: Only Windows versions are supported. There is no integration for QuickBooks for Macintosh.

QuickBooks Free and QuickBooks Simple Start are not supported.

Q6: Does QuickBooks need to be open in order to use Method?

A6: You can still use Method to access and modify information even if QuickBooks is closed. Any changes will be synchronized with QuickBooks next time it is opened on the main synching computer. If you want to take advantage of Method's real-time syncing, QuickBooks must be open, and be open to the correct company file.

Q7: Does Method work on a Mac?

A7: The Method Integration Engine must be installed on a Windows computer. Dispatchers, however, can log in to their Method account via FireFox for Macintosh.

Q8: What happens to my data if I cancel my account?

A8: Once we have confirmed your cancellation, your Method data will be permanently deleted immediately.

5. Evaluation FAQ

Q1. I see lots of Method apps are already available, can I get these with any edition?

A: No. Our website does discuss features in terms of how they pertain to specific industries, but there are only 2 editions of Method: CRM and CRM Pro. CRM Pro is a requirement for our industry specific apps.

Q2: Does QuickBooks have to be installed on each computer to use Method?

A: No, Method is a web-based solution allowing you to log on with the minimum requirements of an active Internet connection and web browser. Internet Explorer and FireFox are the two fully supported browsers with plans to fully support other browsers in the future.

Q3: What is the policy and process for upgrading editions (example: CRM to CRM Pro)?

A: In terms of cost, you simply need to pay the difference between the value of your edition, and the edition you are upgrading to. In terms of the process, it is typically simply a matter of getting the Method Admin to do this within the self managed 'My Accounts' area of Method.

Q5: What is are some of Alocet Incorporated's policies?

A: Please visit our website at the following address to read the complete policy info: http://www.methodintegration.com/web/our-policies.aspx

Q6. What is the pricing for Method?

A. The cost of the monthly subscription for Method is based (1) the edition and (2) number or licenses.

Method CRM: $25 / each user

Method CRM Pro: $40 / each user

Note, once an account (regardless of edition) hits the 20-user mark, they will be automatically switched to License Sharing (see the description below).

We've renamed Concurrent Licensing to License Sharing. With License Sharing, you can have as many users on an account as you like, but the number of licenses determines how many of them can be actively using Method at the same time.

Please visit our website at the following address to read more details on subscription costs: http://www.methodintegration.com/web/method-integration-signup-choose-edition.aspx?ShowAll=True

6.   How to learn more

Contact us! Toll free: 1-888-925-6238, overseas: 1-416-847-0400, email: method@methodintegration.com, website: www.methodintegration.com

Request a web-based Live Product Demonstration with our staff (highly recommended):

Guided Tours and Tutorials:

http://www.methodintegration.com/web/method-full-blown-edition-online-database-for-QuickBooks.aspx