

# GETTIN' STARTED CHECKLIST

## 1 ACCOUNT SETUP

---

- SYNC MY QUICKBOOKS
- ADD OTHER USERS
- SPECIFY EMAIL
- UPLOAD YOUR LOGO
- BOOK MY DEMO!**

## 2 CONTACT MANAGEMENT

---

- ADD A NEW CONTACT
- EDIT AN EXISTING CONTACT
- ADD A NEW LEAD
- ADD AN ACTIVITY TO A CONTACT
- CREATE A CUSTOMER CASE

## 3 SALES

---

- ADD AN OPPORTUNITY
- PERSONALIZE OPPORTUNITY STAGES
- CREATE A NEW ESTIMATE
- ADD A WEB-TO-LEAD FORM

## 4 MARKETING

---

- SET UP A CAMPAIGN
- CREATE A SEGMENTED CUSTOMER LIST
- INTEGRATE WITH MAILCHIMP

## Welcome to Method:CRM!

We're so glad you signed up for a trial of Method for your small business Customer Relationship Management solution :)

Now, let's get you set up for success! In this guide, we'll walk you through the steps for quickly getting setup in Method with links to our 'How-To' documentation and video tutorial resources. Oh, and feel free to print the checklist on the first page to keep on your desk!

## ACCOUNT SETUP

### ❑ **Sync your Method to your QuickBooks**

[\[Watch the Videos\]](#)

First, let's make sure your integration with QuickBooks was successful! To experience the true glory of Method:CRM, you'll want to sync your [QuickBooks Online](#) or [QuickBooks Desktop](#) file with your Method account.

### ❑ **[Add Other Users](#)**

[\[Watch the Video\]](#)

During your trial you can add as many users as you need! Send invitations for other team members to join Method who interact with your company's Customers, Leads, and Vendors.

### ❑ **[Specify Your Email Provider](#)**

[\[Watch the Video\]](#)

Send an unlimited number of emails from within Method (which comes in handy when sending out eNewsletters to customers!).

### ❑ **[Make Method feel like home - upload your logo!](#)**

[\[Watch the Video\]](#)

The first step towards customizing Method to perfectly fit your business is uploading your logo. Your branding will not only personalize the day-to-day experience in Method, but it will become the default logo for PDF files generated in Method, such as reports or invoices!

Awesome! Your Method:CRM account is set up and you're off to the races!

You can continue on with the rest of the Now, it's time to book a personalized demo of Method with your [Customer Success Coach](#).

Because there's so much you can do with Method, our customers tell us how valuable the demo was in steering them in the right direction to quickly get them started.

## CONTACT MANAGEMENT & CUSTOMER SERVICE

### Centralize Your Business Contacts:

Your customers are already in Method from your QuickBooks sync, but you may be managing other contacts in spreadsheets or address books. It's time to get all those contacts centralized! And, if you have a ton of contacts in spreadsheets or another CRM, ask your Customer Success Coach about our [import/export tool](#) during your demo.

❑ [Add a new Contact](#)

[\[Watch the Video\]](#)

❑ [Edit an existing Contact](#)

[\[Watch the Video\]](#)

It's important to manage potential customers, but until they are generating revenue for your company, they do not belong in your QuickBooks file. By using the "Is Lead Status Only" field, new potential customers entered in Method don't sync to QuickBooks until you are ready.

❑ [Add a new Lead](#)

[\[Watch the Video\]](#)

### Document customer, lead and vendor history:

Track all customer, lead and vendor interactions, including phone calls, emails, appointments, marketing emails, and services performed. Set reminders and follow-ups and assign tasks to other staff, so nothing slips through the cracks.

❑ [Add an Activity to a Contact](#)

[\[Watch the Video\]](#)

### Deliver superior customer service

Cases allow you to create and track customer service tickets to help your staff share information and solve issues. Customers can create, update or view the status of tickets as well as view existing solution articles through the Customer Portal.

❑ [Create your first customer Case](#)

[\[Watch the Video\]](#)

❑ [Set up your Customer Portal](#)

[\[Watch the Video\]](#)

### Do you want to up the efficiency by updating Method contacts right from your inbox?

View, add, and edit QuickBooks and CRM data from inside your Gmail or Outlook with our Gmail integration and Outlook plug-in.

❑ [Google Gadget How-To Instructions](#)

[\[Watch the Video\]](#)

❑ [Outlook Plug-In How-To-Instructions](#)

[\[Watch the Video\]](#)

## SALES

### Manage your Sales Pipeline with Opportunities and Leads

*How are you tracking new business opportunities with current customers?*

- [❑ Add a New Opportunity](#) [Watch the Video]
- [❑ Personalize Opportunity Stages](#)

### Get your team creating and sending Estimates without being in QuickBooks

*Your team can easily create, edit and send estimates from Method, which automatically sync into your QuickBooks. Your whole team will save time by eliminating double data entry!*

- [❑ Create a New Estimate from within Method](#) [Watch the Video]

### Do you want to collect leads right from your website?

- [❑ Add a Web-to-Lead form to your website](#) [Watch the Video]

### Do you want to get paid faster?

- [❑ Add a website portal for customers to view & pay invoices](#) [Watch the Video]
- [❑ Set up a Payment Gateway!](#) [Watch the Video]

## MARKETING

### Know which marketing campaigns are generating the best ROI

*With Know where your marketing dollars are being best spent through Campaigns.*

- [❑ Set up your first campaign](#) [Watch the Video]
- [❑ Create segmented customer lists through List Builder](#) [Watch the Video]

### Are you planning to embrace email marketing to engage your customers?

- [❑ Sync with MailChimp](#) [Watch the Video]