FEATURED APP CHECKLIST | intuit quickbooks

method:CRM

Welcome to Method:CRM!

Here's a checklist to help you get started with Method:CRM.

Welcome to Method:CRM – we're glad you're here! We are here to help you get the most out of Method so you can help your clients start streamlining their business. We've put together this checklist to help you get up and running.

1 Explore Method:CRM

- [ ] Check out this great Help Article & Video to familiarize yourself with the Method:CRM Dashboard.
- [ ] Log into Method:CRM.
- [ ] Go to your client's account, look around, and test out our real-time sync with QuickBooks. Create a test Estimate in Method, then see how it automatically syncs into the QuickBooks file!

2 Get Your Client Onboarded with the Method Team – We're Here to Help!

- [ ] Sign up for a demo with our team. We'll walk you and your client through the benefits of Method:CRM and answer any questions you may have.
- [ ] Get your clients to import their leads (potential future customers). You'll see that these leads won't sync to QuickBooks, but your clients will still be able to manage their relationships with them!
- [ ] Create an Opportunity. Within Method, your clients will be able to track a customer all the way through the sales pipeline.

3 Explore Customization – Be your Client's Hero, Offer a Custom Solution.

- [ ] Sign your client up for a Free Hour of Customization Services with a Business Solution Specialist – a $145 value!
- [ ] Explore the possibilities of customizing Method to fit your client's business.

4 Continue Learning

- [ ] Check out our training webinars. Sign up for our live webinars or watch pre-recorded ones when your schedule allows.
- [ ] Visit our Help Center to learn more about Method:CRM

HAVE A QUESTION?

You can always reach the Method Team straight from Method by using the chat icon in the bottom right hand corner. You can also email us at support@method.me. Our team is always happy to chat and help you with any questions you may have!