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Method CRM Plugin FAQS

1. What is the Method CRM plugin?

The Method CRM plugin for the Vonage Business Desktop allows you to link your Method CRM account to your Vonage extension(s).

The Desktop will search your Method CRM account for the caller ID name and phone number associated with your inbound and outbound calls (depending on the plugin's configuration), displaying information for any matching contacts or accounts.

You can use your call information to create new accounts or contacts; add notes to existing accounts and contacts; open cases; and view communication history, opportunities and your caller's open balance.

2. How can I get the Method CRM plugin?

To use the Method CRM plugin, you must first have the Desktop installed. If you do not already have the program installed, visit http://www.vonagebusiness.com/desktop to download and install the application.

Please Note: You must have Microsoft Silverlight installed in order to run the Desktop, which can be downloaded from the same page referenced above.

Once you have installed the Desktop application, contact Vonage's Customer Care Team and request to have the Method CRM plugin added for your extension(s).

After the plugin has been added, open the Desktop application and navigate to the "Plugins" page. You will see a "Plugins" button in the upper, right-hand corner of the application screen.

Scroll down to find the Method CRM plugin on the list, and then click "Install." The Desktop will then download and install the plugin.

3. How do I link my Method CRM account with the plugin?

After the plugin has been added to your account and installed, click the "Edit Settings" button next to the Method CRM plugin on the "Plugins" page.

Enter the "Company Name" for your particular Method CRM account.

Enter your Method CRM username and password.

You may configure the plugin to automatically save notes once the call disconnects, and to activate for your incoming calls, outgoing calls, or both.

Click “Test Connection” to confirm your credentials are correct.

When the test relays a “Success!” message you are connected.

Finally, click “Apply” and the Desktop will be linked to your Method CRM account.

4. How do I find my Company Name?

To find your Company Name, check the tab at the top of your browser when you view the Method CRM website log in page.

You can also find your Site URL in the installation email you receive from Method CRM when you purchase your subscription.

5. How much does the Method CRM plugin cost?

The Method CRM plugin is $2.99 per month, per extension.

NOTE: Pricing is allocated per extension, not per Method CRM user.

6. How do I uninstall the Method CRM plugin?

To remove the Method CRM plugin, navigate to your “Plugins” page by clicking the button in the upper, right-hand corner of the Desktop application.

Find the plugin, and click the “Uninstall” button. The Desktop will remove the plugin.

Like any other Vonage service, you must contact Vonage’s Customer Care Team to remove the Method CRM plugin from your service plan in order to avoid being charged again for the service.

7. The Method CRM plugin is minimized on my Desktop “Call Details” page. How do I make it the default plugin?

To make the Method CRM plugin the default Desktop plugin, click “Plugins”.

Check the box labeled “Set as default plugin” next to Method CRM.

Now the Method CRM plugin will always display in the main section of your “Call Details” page.

8. I want to view this contact in Method CRM online. How do I open up the Method CRM contact in my browser?

To open up your Method CRM account in a web browser with the call's search results, click "Open in Method CRM." This will open your default web browser to your Method CRM account with the same search results.

9. I just got a call from someone new, and I would like to create a Method CRM account/contact for him. How do I do this?

When you receive a call on your Vonage extension, the plugin will search Method CRM for the caller's phone number.

If nothing is found, click the "Create New Contact," "Create New Vendor," or "Create New Lead" link found on the plugin view for that call.

Clicking the link will take you to your Method CRM page through your default browser. From here, you can enter in all the necessary information for your new contact/account.

10. I'm having an important call with a customer later, and I want to use the Method CRM plugin to take notes. How do I do this?

Whether it is inbound or outbound, the call will appear on your Desktop screen (depending on your plugin configuration).

If the call is with an existing contact, you will see a section on the Method CRM plugin view that allows you to "Add Note." From here, you can type in notes for your call.

When you are finished, just click "Save."

When you need to check your notes later, simply open up your Method CRM account in a web browser, search for the contact, and you will see your notes in the communication history.

You can also view a contact or account's note history using the "History" tab on the Method CRM plugin page.

11. One of my contacts just called me from a different phone number. Can I associate this new number with her existing Method CRM contact?

Yes! From the Desktop “Call Details” screen, in the Method CRM plugin view, simply type in the contact’s name in the search bar and click “Search.”

A yellow bar will pop up asking if you would like to associate this new number with this contact. Simply choose what type of phone you would label this as from the drop down menu, then click “Add.”

Alternatively, once you find the correct contact, you will see a link that says “Open in Method CRM.” Click the link, and Method will open in a browser.

Update the contact information here, and save!