



Now with Method AI

Customization is a conversation

m

Estimates

Customize

< Back

Estimates #14532

Synced

\$1,200.00

Total

JJH Landscaping

Primary Details

Customer

Estimate no.

Estimate date*

Expiry date

Billing address

Ship from

1024 N Rush St.
Chicago, IL 60611

28 Wolfert Ave
Menands, NY 12204

Edit

Edit

Additional Details

Sales rep

Status

Terms

Tag list

Territory Manager

Opportunity

Method AI

Mike

Add a territory manager to my estimates

Done. I added **Territory Manager** to your estimates, where the PO number was.

Mike

Don't replace the PO number. Move territory manager down to its own row

Got it. **PO Number** is back, and **Territory Manager** now sits on its own row below.

Enter your prompt



Presenters today



Michael Melo

Staff Product Manager, *Method*



Nelson De Miranda

Sr. Director of Sales & Services, *Method*



Matas Pranckevicius

Host & Content Lead, *Method*

Attendee Poll

**+ tell us
about you!**

method

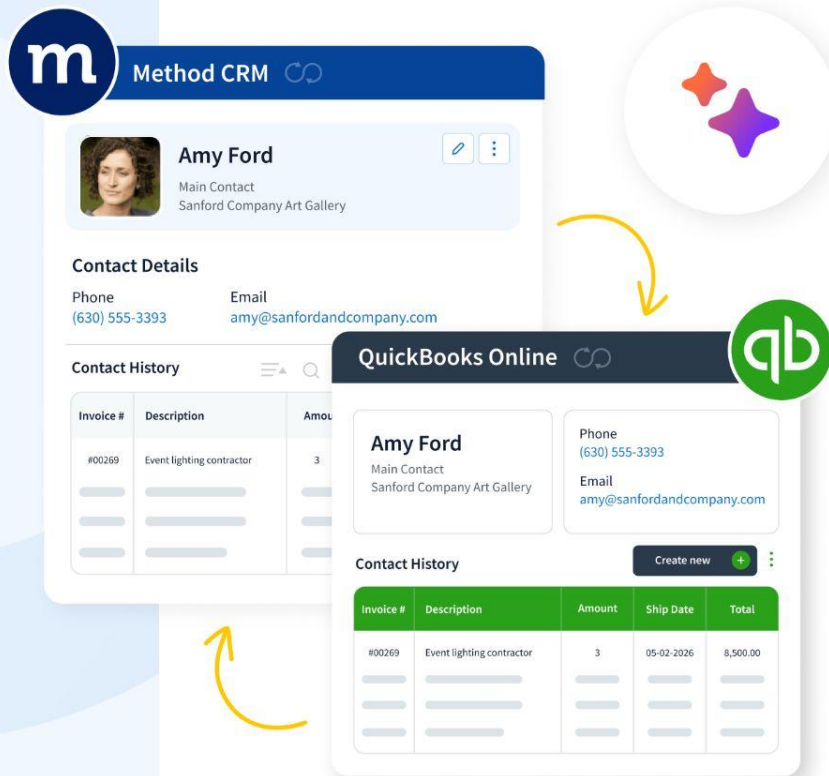
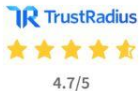
NEW TO METHOD?

The customizable QuickBooks CRM built for **real-world workflows**



TWO-WAY, INSTANT SYNC

How it works with QuickBooks



The next stage of CRM customization at Method

01

On the fly, **quick customizations** to shape your screens

02

A new, redesigned **building experience**

03

Getting to know your apps + building **deeper customizations**

04

Live Q&A to get all your questions answered

Scenario

An ice rink manufacturer needs to focus on larger quotes, put production notes where the team needs them, and add checkpoints before sending.

01

Quick on-the-fly customization

The screenshot displays the 'Invoices' section of a software interface. A table with columns 'Job', 'Customer', 'Date', and 'Invoice #' is shown. A new column, '+Part #', has been added to the left of the 'Job' column, highlighted by a dashed purple box. The first row of this column contains the value 'AD-23390-S'. To the right of the table, a chat window titled 'Method AI' is open, showing a conversation about adding and reordering the '+Part #' column.

Invoices + New Invoice

+Part #	Job	Customer	Date	Invoice #
AD-23390-S	Drainage works	North West Park Services	May-03-2026	#09778

Method AI

Add a Part # column to my invoices

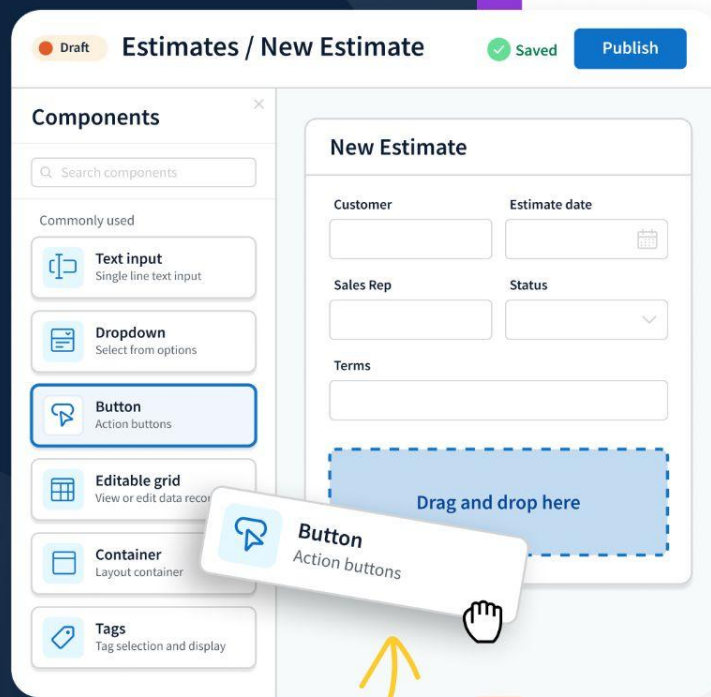
Done. I added a **Part #** column at the end of each line.

Move it to the front, before Job

Got it. **Part #** now sits first, before the Job column.

02

The new building experience



03

Building deeper customizations with AI

QC Passed checkbox has been created. **Three automations** have been added to this component.

The screenshot displays the 'Invoices' page in the Method CRM interface. The page title is 'Invoices' with a 'Customize' link. Below the title, the specific invoice is identified as 'Invoice #14367' with a 'Synced' status. The form is divided into two main sections: 'Primary Details' and 'Additional Details'. The 'Primary Details' section includes fields for 'Customer', 'Invoice no.', 'Invoice date*', 'Due date', 'Class', and 'Terms'. The 'Additional Details' section includes fields for 'Sales rep', 'Opportunity', 'Proposal', 'Tags', a 'Sync with QuickBooks' toggle, and a 'Ship address' field. At the bottom right of the form, there is a checkbox labeled 'Mark QC as passed' which is checked. Below the form, there are three buttons: 'Receive payment', 'Save & back', and a dropdown arrow. A yellow arrow points from the 'Save & back' button towards the top right corner of the image. In the bottom left corner, there is a dashed purple box containing an automation flow diagram. The flow starts with a purple box labeled '✓ QC passed', followed by a sequence of steps: '→ Invoice #14367 created', '→ Email sent to customer', and '→ Status moved to Ship Ready'. A yellow squiggly line is drawn on the right side of the image, starting from the bottom right and curving upwards towards the top right corner.

Primary Details

Customer Invoice no.

Invoice date* Due date

Class Terms

Additional Details

Sales rep Opportunity

Proposal Tags

Sync with QuickBooks

Ship address

Mark QC as passed ☒

Receive payment Save & back

✓ QC passed

→ Invoice #14367 created

→ Email sent to customer

→ Status moved to Ship Ready

**What's the first thing
you'd want to try?**

WHEN IS IT IN YOUR HANDS?

What's live in Method AI Beta now + what's next



Method AI is live in Beta. Staged rollout and what to expect:



AVAILABLE NOW IN BETA

New building experience

Available to everyone: add new forms, lists and fields to the apps you already use.

 Customizing the screens you already have is an ongoing, gradual rollout.

AVAILABLE NOW IN BETA

Method AI customization

Add fields, buttons and rules, and build what fits your business—now faster, with Method AI.

 Method AI Beta is fully live inside the new building experience.

STARTING WEEK OF OCT 5

Method AI where you already work

Make quick changes without ever leaving your existing application screen.

 Your customizations for existing apps stay in place through app updates.

What would be the most helpful to you next?

(Select all that apply)



Have someone show me how Method AI could work for my business



Let me know when AI on existing customizations is available



Keep me updated on the Method AI rollout



I'm just exploring right now

NEW TO METHOD?

Get a CRM that works the way you do

Sign up for a **free 10-day Method CRM trial** and get a **complimentary 1-hour** workflow build session with a Method expert.



method

Things to know about Method AI:

#1

What does Method AI cost?

It's included in your Method subscription at no extra charge while we're in beta. And if you're on a trial, you can try it too.

#2

Does my data go to an AI model?

No. Your books never go to an AI model. Method AI only works on how your setup looks and works.

#3

What if Method AI gets it wrong?

Just say "undo" and Method AI will roll back the change. If you've already left the chat, you can restore an earlier version of your app. Either way, you're only undoing the customization while your records and your numbers stay exactly as they were.

NEW TO METHOD?

Start a free trial, get a complimentary 1-hour workflow consultation & build

Work with a real Method CRM + QuickBooks + workflow expert who understands your business and has done thousands of customization hours in similar industries.



Charvi

4,900+ hours of customization

Workflow expertise in:

Packaging & Distribution, Medical Equipment,
Appliances, Telecommunication



Ryan

5,600 hours of customization

Industry workflow expertise in:

Equipment Maintenance, Construction, Wholesale
& Distribution



Eric

4,900+ hours of customization

Workflow expertise in:

Packaging & Distribution, Medical Equipment,
Appliances, Telecommunication



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Raffle Winners!

Thank you for joining!

Q&A