



You Rang

Caller ID / Screen Pop

User's Manual

Last Updated 2/22/2011

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Adding You Rang to your account

Note: You must have Method Full-Blown edition to add You Rang to your account. To sign up for a Method Full-Blown account or to upgrade your account please go to: <http://www.techinthefield.com/contact.html>

1. From within your Method account, click the *Customize* tab.
2. Select the *My Account* tab link.
3. Scroll to the bottom of the screen where it says **Beta Invite Code**.
4. Enter code: WK6CQ7CC
5. Click Apply. The App description should appear.
6. Click the **add this app** button in the app description.
7. Select whether you would like to create a new Method role or add You Rang to an existing role.
8. Click **add app now!**

Enable Method API

You Rang uses the Method API to search for records on open a customer's screen. The Method API must be enable for each user that will use You Rang. To enable the Method API:

Click the *Customize* tab.

Select the *Users* tab link.

Click **Edit...** next to the user you wish to enable.

Click **Next** until you get to Step 5 of 7: Access To Tables.

Check the box next to "This user is allowed to connect to Method API."

Click **Finish**.

Installing You Rang on each computer

You Rang consists of 2 parts: The Method application and the You Rang Call Monitor which is a Windows program that must be installed on each computer you wish to use. The You Rang Call Monitor uses the Method API to match the phone number of incoming calls with customers in your Method account and to automatically open the customer's account when desired. On each computer:

1. Click on the *You Rang* tab.

2. Select the *Preferences / Install* tab link.
3. Make sure the computer meets the minimum requirements in the Download section
4. Click the **Download You Rang Call Monitor** button. A new browser window will open.
5. Click Install.
6. Follow the prompts to download and install the program.

Using You Rang

1. To open You Rang, click the Start button> All Programs> Tech In The Field> You Rang.
2. On the Login screen, enter your Method Company Account, Login and password.
3. Click the **Login** button. The You Rang icon should appear in the system tray (the area by the clock).
4. When a new call comes in, you should see a balloon above the You Rang Icon that says: **New Call From: 123456789 searching for match.**
5. If a match is found, the balloon will change to **New Call From: 123456789 Match Found, double click to open.**
6. Double click the You Rang icon to open the client's record.
7. When you are done using You Rang for the day, right-click on the You Rang icon and select either **Logout** or **Close**.

Automatically open when call comes in

You may choose to have You Rang automatically open your client's account whenever a match is found instead of double-clicking the You Rang icon. This feature is particularly useful if you have a dedicated line or extension. To enable this feature:

1. Right-click on the You Rang icon.
2. Select **Settings**.
3. Check the box next to "Auto Open"
4. Click **Save Settings**.

Automatically create new activity

You may choose to automatically create a new activity in Method each time You Rang opens a customer's account. To enable this feature:

1. Click the *You Rang* tab

2. Select the *Preferences / Install tab* link
3. Check the box next to “Automatically Create Activity”
4. Click **Save**.

Change which browser You Rang uses

You Rang opens a customer’s account in a new browser window. You may select which browser you would like You Rang to use. Note: The browser must be a browser that Method works in (currently Internet Explorer and FireFox). To Change the browser:

Right-click the You Rang icon.

Click **Settings**.

Click the **Browse** button next to “Internet Browser.”

Locate the browser you would like to use. Hint: Right click on a shortcut to your preferred browser to find it’s location.

Click **Open**.

Click **Save Settings**.