DISCOVERCRM

CAPSULE

EXTENDED PROFILE

Capsule

OVERVIEW

Capsule caters to companies of all sizes, aiming to deliver a comprehensive service of contact management, sales pipeline, and business organization.

Capsule prioritizes sales opportunities and customer interaction through CRM software built to allow for easy management within a single platform, primed for full integration with third-party apps to fit current business structures. Through a fully customizable user interface, Capsule's CRM system is suited for businesses that communicate with their customers through multiple channels who also wish to improve productivity and reduce time-consuming tasks.

Offering a custom-built sales pipeline dashboard, Capsule gives users the freedom to monitor and predict sales possibilities and generate reports to keep track of opportunities throughout the sales process. A robust contact management system gathers together all information, documents, and correspondence from customers into a single place for effective management, and also features social media tracking capabilities to keep customer information current.

A cloud-based system, Capsule offers mobile functionality through both iOS and Android apps. Capsule is available for free for up to 2 users, with a premium option available on a per user, per month pricing structure.

FEATURE OVERVIEW

Capsule

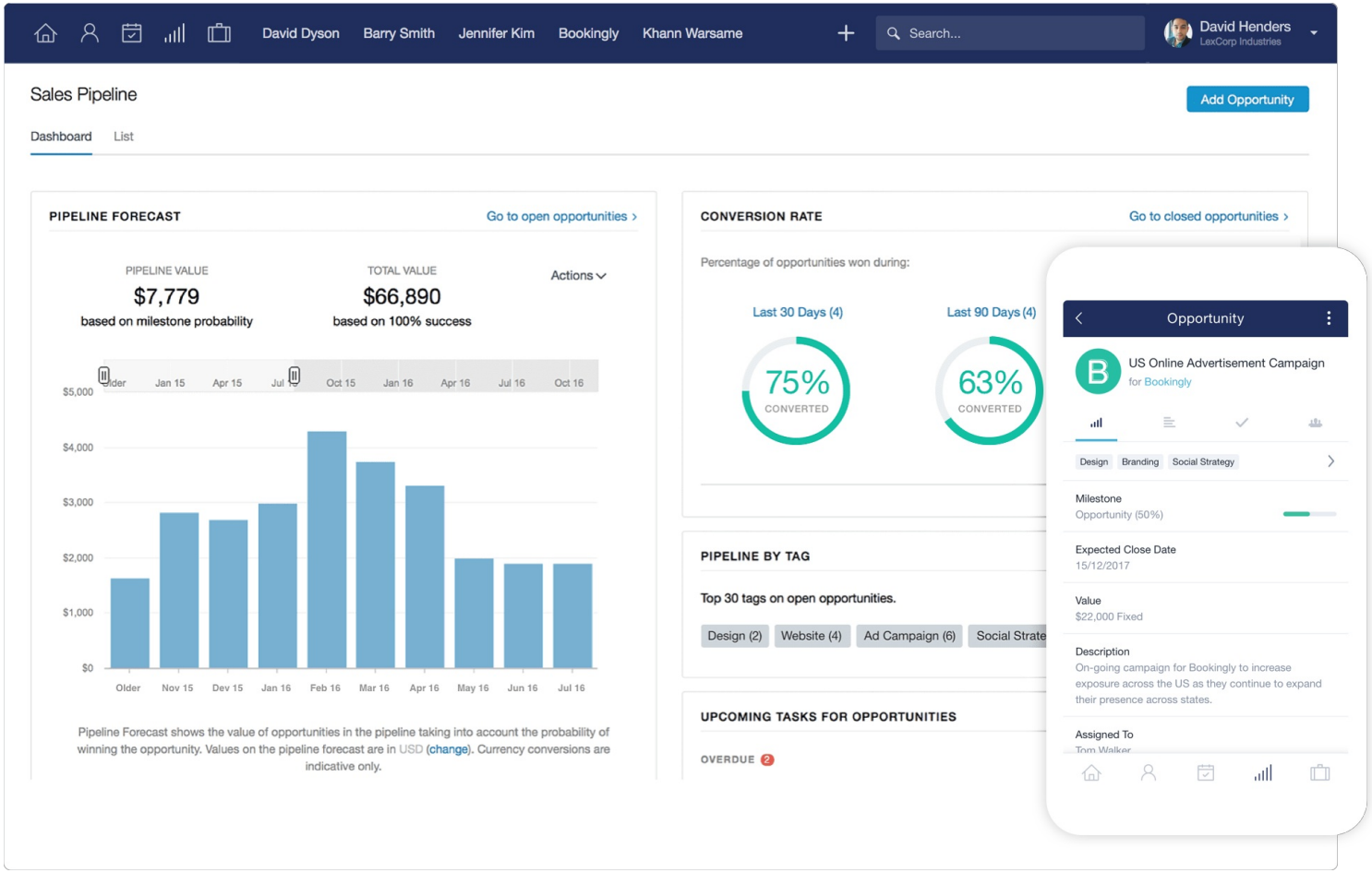
SOFTWARE SPECIFICATION

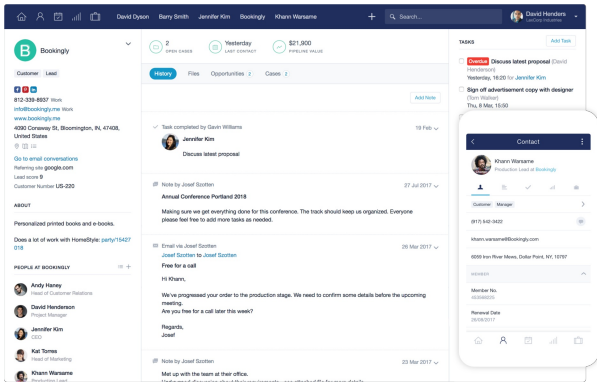
OVERVIEW	
PRODUCT NAME	Capsule
SOFTWARE FEATURES	
API ACCESS	✓
CADENCE	✓
CONTACT MANAGEMENT	✓
CONTRACT MANAGEMENT	✗
DATABASE MANAGEMENT	✓
FUNNEL REPORTING	✓
INTEGRATIONS	✓
PARTNER TRACKING	✗
PERFORMANCE REPORTING	✗
PIPELINE MANAGEMENT	✓
PRODUCT & PRICE CONTROL	✗
SALES GAMIFICATION	✗
QUOTATION HANDLING	✗
TASK ASSIGNMENT	✓
TERRITORY/QUOTA MANAGEMENT	✗
SUPPLEMENTARY FEATURES	
CPQ	✗
CUSTOMER SERVICE AUTOMATION	✗
MARKETING AUTOMATION	✓

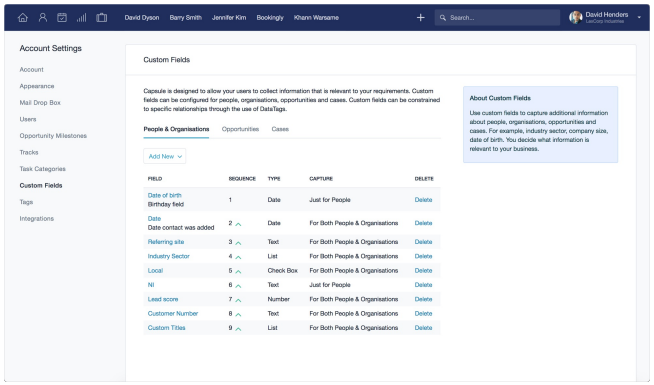
SOCIAL RELATIONSHIP MANAGEMENT	✔
CUSTOMER SIZE	
SMALL (1-50 USERS)	✔
MEDIUM (51-200 USERS)	✔
ENTERPRISE (201+ USERS)	✘
OTHER FEATURES	
MULTIPLE LOCATIONS	✘
MULTIPLE CURRENCY	✘
CUSTOMIZABLE	✔
MOBILE FEATURES	
IOS APP	✔
ANDROID APP	✔
NATIVE WEB APP	✘
HOSTING METHOD	
CLOUD	✔
ON-PREMISE	✘
FURTHER INFORMATION	
PRICING	£8/user/month.

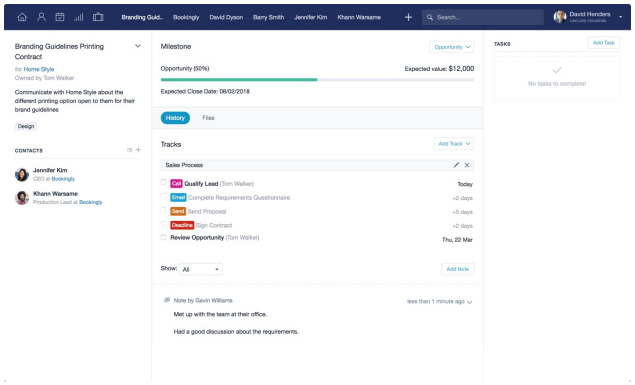
Capsule

SOFTWARE SCREENSHOTS




David Dyson
Barry Smith
Jennifer Kim
Bookingly
Khann Wansame
Bookingly
812-339-8937 Work
info@bookingly.me Work
www.bookingly.me
4090 Conaway St, Bloomington, IN, 47408, United States
Go to email conversations
Referring site google.com
Lead score 9
Customer Number US-220
ABOUT
Personalized printed books and e-books.
Does a lot of work with HomeStyle: party/154270 18
PEOPLE AT BOOKINGLY
Andy Haney
Head of Customer Relations
David Henderson
Project Manager
Jennifer Kim
CEO
Kat Torres
Head of Marketing
Khann Wansame
2
OPEN CASES
Yesterday
LAST CONTACT
$21,900
PIPELINE VALUE
History
Files
Opportunities 2
Cases 2
Add Note
Task completed by Gavin Williams
19 Feb
Jennifer Kim
Discuss latest proposal
Note by Josef Scotten
27 Jul 2017
Annual Conference Portland 2018
Making sure we get everything done for this conference. The track should keep us organized. Everyone please feel free to add more tasks as needed.
Email via Josef Scotten
26 Mar 2017
Josef Scotten to Josef Scotten
Free for a call
Hi Khann,
We've progressed your order to the production stage. We need to confirm some details before the upcoming meeting.
Are you free for a call later this week?
Regards,
Josef
Note by Josef Scotten
23 Mar 2017
Met up with the team at their office.
TASKS
Add Task
Overdue Discuss latest proposal (David Henderson)
Yesterday, 16:20 for Jennifer Kim
Sign off advertisement copy with designer
(Tom Walker)
Thu, 8 Mar, 15:50
Contact
Khann Wansame
Production Lead at Bookingly
Customer
Manager
(817) 542-3422
khann.wansame@Bookingly.com
6059 Iron River Mews, Dollar Point, NY, 10797
MEMBER
Member No.
Renewal Date
26/08/2017


David Dyson
Barry Smith
Jennifer Kim
Bookingly
Khann Wansame
Account Settings
Account
Appearance
Mail Drop Box
Users
Opportunity Milestones
Tracks
Task Categories
Custom Fields
Tags
Integrations
Custom Fields
Capsule is designed to allow your users to collect information that is relevant to your requirements. Custom fields can be configured for people, organisations, opportunities and cases. Custom fields can be constrained to specific relationships through the use of DataTags.
People & Organisations
Opportunities
Cases
Add New
FIELD
SEQUENCE
TYPE
CAPTURE
DELETE
Date of birth
Birthday field
1
Date
Just for People
Delete
Date
Date contact was added
2
Date
For Both People & Organisations
Delete
Referring site
3
Text
For Both People & Organisations
Delete
Industry Sector
4
List
For Both People & Organisations
Delete
Local
5
Check Box
For Both People & Organisations
Delete
NI
6
Text
Just for People
Delete
Lead score
7
Number
For Both People & Organisations
Delete
Customer Number
8
Text
For Both People & Organisations
Delete
Custom Titles
9
List
For Both People & Organisations
Delete
About Custom Fields
Use custom fields to capture additional information about people, organisations, opportunities and cases. For example, industry sector, company size, date of birth. You decide what information is relevant to your business.


Branding Guid..
Bookingly
David Dyson
Barry Smith
Jennifer Kim
Khann Wansame
Branding Guidelines Printing Contract
for Home Style
Owned by Tom Walker
Communicate with Home Style about the different printing option open to them for their brand guidelines
Design
CONTACTS
Jennifer Kim
CEO at Bookingly
Khann Wansame
Production Lead at Bookingly
Milestone
Opportunity
Opportunity (50%)
Expected value: $12,000
Expected Close Date: 08/02/2018
History
Files
Tracks
Add Track
Sales Process
Call Qualify Lead (Tom Walker)
Today
Email Complete Requirements Questionnaire
+2 days
Send Send Proposal
+5 days
Deadline Sign Contract
+2 days
Review Opportunity (Tom Walker)
Thu, 22 Mar
Show: All
Add Note
Note by Gavin Williams
less than 1 minute ago
Met up with the team at their office.
Had a good discussion about the requirements.
TASKS
Add Task
No tasks to complete!