



The Institute of Certified Bookkeepers

Software Review

Conducted by Karen Garrattley MICB PM.DIP

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Capsule



The Reviewer

Karen set up her business 30 years ago and has experienced the growth of computers and related software during this time. Keen to embrace new technologies and new systems, Karen is constantly striving to find more efficient and time-saving ways of dealing with the many complexities in business. She spends much of her time advising businesses on how to improve on their systems, their access to information, and their understanding of their finances, all whilst spending less time on them.

Karen's company, COS Bookkeeping, whilst predominantly a bookkeeping firm working with Xero, Quickbooks, and Sage, they specialise in add-ons to make their services much more efficient. These include Dext, Capsule CRM, Pleo, Comma, A2X, Hubdoc, Link by Books etc. Karen and her team implement the software and either use them in house, and/or teach clients how to use them effectively.

Company Background

Capsule is based in Manchester, just as we are. We visited their offices a couple of years ago and met the staff and the bosses. It's a reassurance to meet real people working hard to give you the software you need.

Capsule believe the value of a modern CRM lies in the ability to help businesses stay organized, know more about their customers, build strong relationships, and make the most of sales opportunities, all while minimizing user input. They built Capsule to deliver on these values and today, Capsule is used by thousands of businesses of all sizes all over the world. Development is driven by customers' requests.

The Product

Capsule stores information about your business, your customers, and your services. It's simple to use but has many useful features including document storage, notes, lead tracking, reminders, assign tasks/records, and the ability to segregate your data in many customisable ways.

Capsule offers features that cover Sales Tools, Task Management, Reporting, Contact Management, Security and Permissions, Connectivity and Customization.

The full list can be found [here](#).

Suspect 4	Prospect 2	Champion 2	Opportunity 0	Proposal 2
<ul style="list-style-type: none"> Video Vine: Maintenance contract, \$10,000 AudioHive: CRM Strategy, \$20,000 Fuel Rocket: Update online T&Cs, \$700 Magnetized: Setup and space, \$1,500 	<ul style="list-style-type: none"> Biomax Labs: Branding and Identity, \$30,000 Marketric: Online Advertisement, \$600 	<ul style="list-style-type: none"> Magnetized: US Online Advertiseme..., \$22,000 Fuel Rocket: Re-Design, \$2,000 		<ul style="list-style-type: none"> Fuel Rocket: Branding Guidelin Video Vine: Project X

Key Benefits

As well as storing the usual information, we use Capsule CRM for the following:

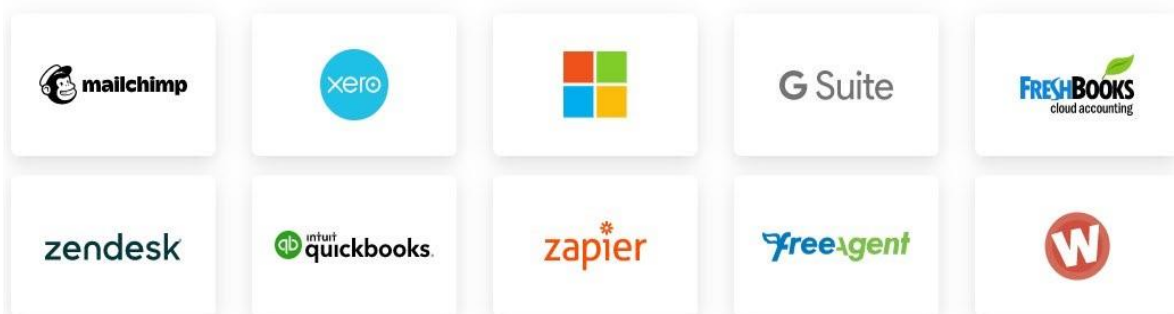
- Record the source of all contacts
- Segregate records into suppliers, accountants, clients, prospects etc., then further segregate for example, under Clients, we can choose if a client takes our payroll service, our bookkeeping, our support etc.
- Use “tracks” to automate our sales process and delegate tasks to staff. For example, for a software subscription, we must remember to provide a written quote, to ask for the company information to set up the software, to ask the client to complete a direct debit, to invite them to the software, and finally raise a repeating invoice in our software. This is one of our simplest “tracks” but still has 5 steps involving three people. As each task is completed, the next task is assigned to the relevant person.
- Use “Cases” to remind us of when quarterly, monthly, or annual tasks are required, such as Anti-Money Laundering checks, P11d’s, VAT returns etc.

The screenshot displays the Capsule CRM interface. On the left, a contact profile for Jonathan Kim, CEO at Bookingly, is shown with his contact information and social media links. The main area features a 'History' tab with a list of activities: a task completed by Sofia Wilkins, an email from Danielle Henders, a note added by Liam Blake, and a call by Danielle Henders. On the right, a QuickBooks integration panel shows account balances and a list of estimates with their statuses and due dates.

We love the interaction with our accounting software:

- QuickBooks Online
- Xero
- FreshBooks
- FreeAgent
- KashFlow
- Sage Business Cloud Accounting

Staff can quickly and easily see if a client has overdue invoices and see details of invoices raised. The contact record can be sent from Capsule CRM to Xero/Quickbooks with just one click.



Having reminders and workflows are essentials, but sometimes when there is so much going on, you lose sight of where everyone is up to and what needs to be done at a glance. Capsule provides excellent, instant, views so you can see exactly where you are.

Their recent integration with Microsoft 365 and Outlook, along with Google Workspace is a key feature.

Sorting your contacts into usable lists is easy too. We use these lists for a variety of reasons but mostly so we can send relevant emails. The link to Mailchimp facilitates the use of these lists, making the marketing side of the data accurate and simple.

Capsule is an easy recommendation to your clients too. You may want to consider signing up for their [Affiliate Program](#) – giving you 20% commission of the revenue Capsule earns from each client you refer, for the life of their accounts. Passive income such as this can make a real difference to your practice.

Strengths

You can start using Capsule CRM immediately. There's no complicated setup and not much planning required. As soon as you understand the differences between a company record and a personal record, start entering data - it's amazing how quickly your data grows. As your business develops, your CRM needs also develop. Capsule CRM allows for this easily as it's so adaptable. Even established businesses need a CRM that's adaptable - one that can be amended instantly without rekeying information or having to export or import. Capsule allows for all these scenarios. With customisable fields, milestones, workflows etc., it's very easy to mould it to your requirements. The free version may just be right for you, but it's easy to upgrade to their professional, paid version if you need it. You can set up a free 30-day trial on any of the plans.

As the software is so easy to use, you may not need any help. But if you do, their customer support is excellent, providing fast, responsive, 24/7 chat. Their [Resources](#) section also provides useful videos on how to get the best from Capsule. Overall, good people to deal with.

Areas to improve

We've struggled to find any areas to improve. We would like to be able to add additional items to our custom fields list on the fly and have fed this back to the Capsule. The ability to create custom reports for printing or export too would be nice. Reports are available for your sales pipeline but not much more.

Value for Money

Capsule offers a 30-day free trial as well as a free version. It is extremely good value for money, starting at £12 per person per month for the paid version giving you 50,000 contacts, 10G storage and links to Office/Google, as well as Xero, Quickbooks, Zapier, Mailchimp and more.

Testimonials

G2.com: 4.8 out of 5

“With Capsule CRM, it has become easier to set up tracks and view workflow. Capsule is very easy to use and very easy to configure. In my last firm, we had Salesforce with took a year to implement for 30 users cost nearly \$100k in fees. We are only two people but got 90% of the configuration/functionality of Salesforce in a few hours with no integration fees and at a great value.” Read the full review [here](#).

TrustRadius: 4 out of 5:

“There's a Getting Started link in the top right-hand corner that opens up a wizard that guides you through several steps to get your account up and running. You can add or import contacts, add tasks, add and track opportunities in a pipeline, learn how to store emails, tweak the settings, download the app for your phone, and connect your social networks.” Read the full review [here](#).

Summary of Review

In summary, implementing Capsule is one of the best things we've done in our practice, and it has become an essential part of our day-to-day activities.

It would be very useful for your clients who could find different features a good fit for running their business. The recent release of the [Multiple Sales Pipelines](#) feature is a good example of that, but there are many more examples.

Overall, what stands out is that it's a straightforward, intuitive solution that helps bookkeepers and businesses alike keep track and make the most of every opportunity.

Disclaimer

The Institute of Certified Bookkeepers having reviewed the Capsule software package cannot be held responsible in any way for the actions of the company or their software. This review is an overview of the software package. Any enquiries should be directed to <https://capsulecrm.com/support/>.

