



## DEAR Capsule CRM Integration Explained

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## Multiple Accounts

It is possible to link several Capsule accounts (sites) to a single DEAR account. Each linked store has independent settings and contact list.

## Integration settings

### Ignore contacts without organizations

Default value is “checked”. You have an option to choose if you will download only organization’s contacts from Capsule CRM or both (organization and persons). If contact (person) is assigned to organization it will be downloaded as contact person.

### Default taxation rules

You may specify default taxation rule for Customers and Suppliers. These rules will be assigned to newly created (downloaded) Customers or Suppliers from Capsule CRM. Taxation rules must be valid

### Link Capsule and DEAR address types

Capsule has three types of Addresses: Postal, Home, Office. In this grid you may map it to DEAR Address type. This field defines how contact’s address will be processed as Billing or as Shipping. Default settings are set on Capsule account (site) was connected to DEAR.

### Link Capsule tags to DEAR contact types

To simplify downloaded contacts processing we allow to map person/organisation tags in Capsule to contact types in DEAR (Supplier, Customer, Ignore the contact).

The main idea for this mapping table is to automatically define what contact is a Customer, and who is a Supplier by using tags assigned to contact in Capsule.

You can choose who will be a Customer, and who will be a Supplier by managing tag mapping.

### Disconnecting from Capsule site

When you disconnect from Capsule account (site), DEAR removes all associations between DEAR objects and Capsule. Note, that customers and suppliers that were successfully downloaded will not be deleted.

## Downloading Contacts

Contacts could be downloaded from Capsule. In general all contact’s fields are equals in Capsule and in DEAR. All Capsule contacts are saved in the temporary DEAR storage and displayed in the contacts grid.

In most of case (if tags are specified and it matches with tag mapping) you do not need to select Contact Type (last column in grid) as it will be automatically assigned. But in case if no tags are specified, or any conflict between them, then user action required. You can manually choose specific contact type. Customer/Supplier will be created immediately after you change its contact type in the grid.

### **Save not defined as Customer/Supplier**

All Capsule contacts which are not converted to Customer or Supplier could be converted as customer or supplier in bulk. This action will process all contacts with not defined type are set it to chosen type.

This might be useful if all contacts in Capsule are customers (or suppliers).