

Contact Management





	FOUNDATION \$16	PRO \$42	POWER AI ✨ \$52	ENTERPRISE \$67
Contact records and data storage	Unlimited	Unlimited	Unlimited	Unlimited
Centralized customer database Store your customers' contact information, order details, and communications in one place, accessible to your entire team from any device.				
Automatic contact sync Synchronize your phone contacts and collect customer information instantly from website forms.				
Automatic customer data scouring Nutshell Intelligence automatically searches public sources to gather information on your new leads, such as their location, job title, and social media accounts.				
Intelligent search function No need to type exact names to find your clients and companies. Type in a part of it, and we'll fill in the rest.				
Business card scanner				

*Price shown is per user per month.



Lead Capture



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<p>Design simple web forms that capture customer information and automatically create new contacts and leads.</p> <p>Design simple web forms that capture customer information and automatically create new contacts and leads.</p>	Up to 5 forms	Up to 10 forms	Up to 25 forms	Unlimited custom forms
Copy-and-paste form embed codes				
Shareable URLs for forms				
<p>Form performance tracking</p> <p>Nutshell automatically tracks page visits, form submissions, and conversion rate from all of the webpages where the form has been embedded.</p>				

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Pipeline management
































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Customizable sales pipelines	1	5	10	Unlimited
Drag-and-drop Board view				
Customizable Board View Admin users can easily customize lead cards per-pipeline to align with the unique needs of your team and company.				
Interactive Map view				
List view				
Chart view				
Hot leads Give your high-priority leads more visibility throughout your CRM.				

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Communication and task management

Nutshell

	 FOUNDATION \$16	 PRO \$42	 POWER AI ✨ \$52	 ENTERPRISE \$67
Communication histories				
Team @-mentioning and alerts				
Unlimited bulk email templates				
Activity reminders				
Unlimited click-to-call and phone recordings				
Custom fields	25	50	100	Unlimited
Multiple currencies				
Note-taking with voice transcription Nutshell Notetaker uses your computer microphone to transcribe your voice into text, so you can take notes, write emails, and communicate with team members faster.			Unlimited	Unlimited

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Reporting and performance tracking



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At-a-glance revenue and pipeline dashboard Keep an eye on your sales numbers, what your team is up to, and what you need to get done that day—all in one convenient place.	✓	✓	✓	✓
Sales report Instantly view how you're tracking against quota and previous periods, and segment by product, rep, lead source, and more to identify what's really driving your sales.	✓	✓	✓	✓
New leads report Monitor your lead volume, identify your best lead sources, and ensure that your pipeline is always full.	✓	✓	✓	✓
Advanced reports Forecast report, Losses report, Activity report, Funnel report and Custom reports.	✗	✓	✓	✓
Snapshots Discover and track trends in pipeline growth, win rate, sales cycle size, and more.	✗	✓	✓	✓
Sales and activity quotas	✗	✓	✓	✓
Customizable roles Create roles within your organization and customize the permissions for each.	2	3	3	50
Changelog View changes on People, Leads and Company timelines to trace any user actions.	✗	✗	✗	✓
Audit log Trace certain actions taken by users in your organization, user logins, bulk list exports, bulk edits.	✗	✗	✗	✓
Read-only SQL access Leverage SQL to extract, transform and analyze your Nutshell data for custom integrations and advanced reporting.	✗	✗	✗	✓

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Sales automation







































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Guided sales process builder	✕	✓	✓	✓
Automated lead assignment	✓	✓	✓	✓
Automated pipeline distribution	✕	✓	✓	✓
Automated lead advancement	✕	✓	✓	✓
Automated tasks	✕	✓	✓	✓
Post-sale lead management Nurture existing customers and recapture lost prospects by creating follow-through tasks for won, lost, or cancelled leads.	✕	✓	✓	✓
Team guidance and coaching Help new sales reps hit the ground running by providing instructions and expectations for each pipeline stage.	✕	✓	✓	✓
Teams Used to restrict user permissions, assigning leads to multiple users at once, organizing your sales team and setting sales quotas for your team.	2	5	10	Unlimited

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Email automation

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Send and reply to work emails directly from Nutshell				
Shareable email templates				
One-click bulk emailing				
Personal email sequences Create and schedule one-on-one sales drips that are more likely to capture attention. Nutshell triggers a sales sequence at the pipeline stage of your choice, remembers the follow-up for you so that valuable prospects don't float away, and stops the sequence as soon as they reply.				
Reply rate tracker and view counter				
Email click tracking & notifications Track engagement on the emails you send from Nutshell.				
Email health score				
150 Free Nutshell Campaigns Emails Nutshell Campaigns is an add-on that starts for as little as \$5/mo and is based on the number of contacts. Even without adding Nutshell Campaigns, you are able to send up to a certain number of emails with Nutshell Campaigns based on your CRM plan.				

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World-class support



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Email support				
Chat support Monday-Friday from 7:30 am to 10:30 pm Eastern (excluding holidays)				
Free scheduled phone support				
Free onboarding data importing assistance We will import your data for you, absolutely free, when you get started with Nutshell.				
Free ongoing data importing assistance Enterprise plan customers can request for Nutshell to import additional data – even after the onboarding process.				
Email marketing migration assistance We will import your email marketing data for you, absolutely free, when you get started with Nutshell Campaigns.				
Connected Form set up assistance We will help you set up Nutshell Forms or integrate your connected forms.				
API support We will provide API support for apps you are integrating with Nutshell.				
Dedicated success strategist A dedicated CRM specialist to help you onboard your team and get the most out of Nutshell. Must have 5 users to have a Dedicated Success Strategy.				
Self-service knowledge base				

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Apps and integrations







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Native iPhone and Android apps				
Email and calendar sync with Gmail, Office 365, Outlook, and Microsoft Exchange				
One-click integrations with QuickBooks Online, Slack, Unbounce, Intercom and many other time-saving tools				
AppConnect AppConnect gives you additional flexibility to connect Nutshell with thousands of software products.	Free for teams with 5+ CRM seats	Free for teams with 4+ CRM seats	Free for teams with 3+ CRM seats	Free for teams with 2+ CRM seats
Enterprise SSO & user/group provisioning Other SCIM provisioning available. Microsoft Azure & ADFS, Google Workspace SAML, Okta, Auth0, OneLogin, & PingFederate				

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AI capabilities

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Nutshell Campaigns email writing assistant Whether you are using your 150 free Campaigns emails per month or you are a paid subscriber, our AI writing assistant is here to help get you started with your emails.	✓	✓	✓	✓
People, Lead & Company timeline summarization Use AI to summarize long timelines to get the most important information front and center.	2 per user per month	2 per user per month	50 per user per month	100 per user per month
Zoom transcription summarization Nutshell's native Zoom integration allows you to save and summarize your Zoom transcriptions so that no important detail goes missed.	✗	✗	✓	✓
Note-taking with voice transcription Nutshell Notetaker uses your computer microphone to transcribe your voice into text, so you can take notes, write emails, and communicate with team members faster.	✗	✗	Unlimited	Unlimited

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