



Nutshell Quotes

Create, Send, and Track Custom Quotes From Nutshell

Close deals faster with a quoting tool fully integrated with your CRM. Create, send, and track custom sales quotes for clients and customers—all in just a few clicks, right inside Nutshell.



Will Gordon
Director of Marketing
at Nutshell

Today's Agenda

- What is Nutshell Quotes? 10 minutes
- Demo 15 minutes
- How to access Nutshell Quotes 5 minutes

- Q&A

Please ask your questions in the chat throughout the presentation and we'll answer what we can!

What is Nutshell Quotes?



Create custom quotes seamlessly from Nutshell

- Build a professional, branded quote template for fast quoting
- Create new quotes directly from a Lead page
- Auto-populate quotes with Lead data - from contact details to product information
- Review and edit quote fields before sending to ensure accuracy
- Share quotes with your prospects as shareable links or PDFs

Quote template
Set up your default information for faster and efficient quotes.

Quote defaults

HEADER ✎

 **Nutshell**
213 S. Ashley, Suite 200
Ann Arbor, MI, 48104

<https://www.nutshell.com> **QUOTE**

PREPARED FOR

DETAILS

CUSTOMIZE YOUR COLUMNS ✎

Name	SKU 	Quantity	Price	Term 	Discount 	Total

Choose which columns appear by default in your quote's product table by clicking the eyeballs above. Products from your lead will appear here when a real quote is generated.

NOTES ✎

Add any important information here for your recipient

SUBTOTAL

Seamlessly track quote status and deal progress

- View all quotes and their status under Sales > Quotes > Manage
- Track quote status on the Lead page, from *Draft* to *Accepted*

Manage quotes
View, download, and restore quotes

Status... Owner...

Quote number	Lead	Owner	Status	Last update ↑	Value	
207821-01			Ready			⋮
207622-02			Ready			⋮
200957-02			Ready			⋮
207831-01			Accepted			⋮
207807-01			Ready			⋮
207596-01			Ready			⋮
196631-01			Ready			⋮
206459-01			Ready			⋮
207622-01			Ready			⋮
207636-01			Removed			⋮
207365-01			Draft			⋮
207691-03			Removed			⋮
207691-01			Removed			⋮
207691-02			Removed			⋮

Activity Phone Call Duration 15 minutes More options Log activity

All entries All activity types All users & teams All time Summarize View changelog

1:55 PM
Appleaseed Ventures, Jim Appleaseed accepted quote 1037-01 valued at R9,180.00

1:48 PM
Hamida S marked quote 1037-01 as ready for Appleaseed Ventures, Jim Appleaseed

QUOTES Learn more

Quote 1046-02
R650.00 Draft

Quote 1046-01
R650.00 Draft

+ Add a quote

Automate quoting to keep deals on track

- Create automations to move leads through your pipelines once a quote is sent or accepted
- Get instant alerts when a prospect views or approves a quote so you can follow up right away

Quotes			
Any quote is viewed	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Any quote is accepted	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
A quote on one of your leads is viewed	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
A quote on one of your leads is accepted	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

The screenshot shows a CRM interface with a modal window titled "What is your stage goal?". The modal has a "Cancel" button on the left and an "Add" button on the right. The main content area contains the following text: "Nutshell watches each lead in this stage, and automatically advances it when your goal has been met." Below this is a dropdown menu labeled "Choose a stage goal...". A list of goal options is shown below the dropdown, with the last two options highlighted in a blue box:

- Track when a lead clicks a link in your initial outreach. When they do, the lead will move to the next stage.
- Receive an email from the lead
Wait for a lead to reply to your initial outreach. When they email you, the lead will move to the next stage.
- Learn something specific about the lead
Collect a field unique to your business like a budget, delivery details, or a project timeframe.
- Send a quote to the lead**
Send a quote to the lead. When they accept the quote, the lead will move to the next stage.
- Accept a quote from the lead**
Accept a quote from the lead. When they accept the quote, the lead will move to the next stage.

Let's Walk Through Nutshell Quotes



How to access Nutshell Quotes

- Nutshell Quotes is an add-on available for \$45/month *for your entire team*
 - *most comparable software is “per user per month”*
- Customers on any Nutshell Sales plan can purchase Nutshell Quotes
- To purchase Nutshell Quotes:
 - Settings > Administration > Billing > Update my plan
 - Quotes will be on the “Add-ons” page
- To start using Nutshell Quotes, go to Sales > Quotes > Template

Nutshell Quotes

While Sales and Engagement plans are priced per seat, Nutshell Quotes is priced on a per-company basis.

*All add-ons require an active [Nutshell Sales](#) subscription to purchase.

QUOTES **\$45** per month

Get quotes out to leads and prospects faster

- Generate unlimited custom quotes directly from Nutshell
- Create, send, track, and manage quotes without leaving your CRM
- Set stage goals based on quote activity to automatically move leads through your sales pipeline
- Get notified with a prospect views or accepts your quote
- And more.

Q&A

Join our monthly support-led webcast

Join us on the 4th Wednesday of every month at Noon eastern for our recurring webcast where we go over how to set up, use, and get more out of the Nutshell essentials.

It's also a great opportunity to be able to ask a question and be **shown** an answer.

You can register at: <https://www.nutshell.com/guided-tours/nutshell-best-practices>

Our next Nutshell Best Practices webcast will be on March 26, 2025 at 12:00 PM EST.

Thanks for joining us today!

Upcoming releases:

- **Marketing Email link report:** See exactly which email recipients clicked on which links in your Email marketing campaigns *(Released March 10th - Available on Marketing Pro)*
- **Facebook and Instagram integration in Nutshell Engagement:** Add Facebook Messenger and Instagram DMs to your engagement channels. You'll be able to manage conversations with leads through Messenger and Instagram, create leads from new messages, and more
- **Smart vs. fixed audiences:** Choose whether your audiences update dynamically or remain the same. Also uniting "Saved lists" and "Audiences"

Keep up to date with all of our Product Updates ([here](#)) or subscribe to our [Shipping News newsletter](#).