



# NUTSHELL

# EXTENDED PROFILE



## OVERVIEW

Nutshell CRM is used by companies across a wide range of industries, including food and drink, retail and the financial sector. The software focuses on flexibility, ease of use, and mobile compatibility.

Nutshell CRM caters to companies of all sizes but is especially popular with high-growth startups who require their CRM to evolve with rapidly changing business needs. This is reflected in the software's three-tier pricing model. Nutshell's CRM is offered in three different packages - 'Starter', 'Pro' and 'Pro+', allowing companies to select the package that best suits them and scale up when extra functionality is required.

Features vary between packages, though Nutshell's emphasis on 'selling smarter' is present across all of them. Common to all three packages includes basic sales tracking and reporting, and integration with a number of widely-used business apps such as Google Apps, Zendesk, and MailChimp. At the higher end of the CRM packages, the Nutshell CRM offers more powerful reporting tools and additional sales process automation.

Nutshell pricing is structured per user per month. The CRM software is cloud-based, with native mobile apps available for both iOS and Android operating systems. For tablets, the Nutshell CRM has been responsively designed to run through web browsers.

## FEATURE OVERVIEW



## SOFTWARE SPECIFICATION

OVERVIEW	
PRODUCT NAME	Nutshell
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	✗
<b>SUPPLEMENTARY FEATURES</b>	
CPQ	✗
CUSTOMER SERVICE AUTOMATION	✗
MARKETING AUTOMATION	✓
SOCIAL RELATIONSHIP MANAGEMENT	✓
<b>CUSTOMER SIZE</b>	
SMALL (1-50 USERS)	✓
MEDIUM (51-200 USERS)	✓
ENTERPRISE (201+ USERS)	✓
<b>OTHER FEATURES</b>	
MULTIPLE LOCATIONS	✗
MULTIPLE CURRENCY	✗
CUSTOMIZABLE	✓
<b>MOBILE FEATURES</b>	
IOS APP	✓
ANDROID APP	✓
NATIVE WEB APP	✓
<b>HOSTING METHOD</b>	

CLOUD	✓
ON-PREMISE	✗
<a href="#">FURTHER INFORMATION</a>	
PRICING	From \$20/user/month

## SOFTWARE SCREENSHOTS

The screenshot displays the Nutshell CRM dashboard. At the top, there is a navigation bar with a 'Create New...' button, a search bar, and user information for 'Hello, Jim'. Below this is a secondary navigation bar with tabs for 'Dashboard', 'Leads', 'Accounts', 'Contacts', 'Reports', 'Setup', and 'Support'. A 'Sabre' logo is visible in the top right corner.

The main content area features a 'Welcome to the Nutshell dashboard' message with instructions and a list of tasks:

- Build a sales process so that leads automatically distribute tasks
- Invite your colleagues to use this Nutshell account
- Set up activity types to report on phone calls vs. demos
- Sync Nutshell activities to your Google Calendar

On the left side, there are two summary widgets:

- Sales this month:** Your sales: \$0.00, Your projected sales: \$0.00
- Activities this week:** Phone Call: 0 / 50, Meeting: 0 / 1, Virtual Meeting: 0 / 2

The right side of the dashboard shows a 'Your tasks' section with filters for 'Hide overdue' and 'Recently completed'. The tasks listed are:

- Prepare proposal:** Due Aug 25, 2012, 8:05 PM. Wynn Resorts | Lead-1605. Status: You must have a product attached to the lead to complete this step.
- Call & schedule a visit:** Due Aug 25, 2012, 10:45 PM. Rohm & Haas | Lead-1653. Status: You must have a logged activity attached to the lead to complete this step.
- Skype call:** (partially visible)

