NEW TO NUTSHELL?

You’ve come to the right place!
What’s the big picture?

Nutshell helps you get organized, build stronger relationships, convert more leads, and ultimately increase your revenue. We believe that a great CRM should save you time, help you stay focused on the most important tasks, and close more deals, not get in your way with data entry or unnecessary friction.
What can Nutshell do for you?

✓ Get organized
✓ Better manage your outreach
✓ Improve your sales process to win more leads
✓ Increase visibility across reps and teams
✓ Hold your team accountable
Nutshell Terminology

**Companies**
The businesses that you work with.

**People**
The contacts that you have at those businesses.

**Leads**
Potential sales deals with your companies and people.

**Activities**
Scheduled events with your companies, people, and leads.

**Tasks**
Lightweight reminders for you and your teammates.

**Reports**
Generate lead reports to learn more about your sales

**Dashboard**
See your metrics and what’s scheduled for the day.

**Dashboard Timeline**
A real-time feed of everything going on in Nutshell.

**Timeline**
A complete log of all correspondence and notes with a company, person, or lead.
# Nutshell Terminology

## Pipeline
A process you work leads through to bring them closer to buying.

## Stage
Defined milestones to track leads through a pipeline.

### Stage Guidance
Advice for you to help you progress the lead.

### Stage Goals
The main purpose of each stage that brings leads closer to a sale.

### Stage Tasks
The to-do items for a lead while it is in a certain stage.

## Outcomes
Learn why leads are lost or cancelled and report on them later.

## Status
Where your lead is at in its life cycle, from open to close.

## Sources
Track where your leads are coming from to understand their journey.

## Custom Fields
Store info about a company, person, or lead that's relevant to your sales process.
Where are things located?

- Create new entries
- Search
- Dashboard
- Companies
- People
- Leads
- Reports

- Activities and Tasks
- Notifications
- Help Center
- Your settings

**Sales metrics**
- **New leads**
  - Up 29% from 14 this time last month
- **Open leads**
  - Down 12% from $3.72m this time last month
- **Sales**
  - Up 16% from $692k this time last month

**New Leaderboard**
- Antonio Bishop: 3 won ($279k)
- Sandra Hendrix: 2 won ($262k)
- Charles Berry: 2 won ($174k)
- Lisa Williams: 1 won ($78.6k)
- Dana Vargas: 1 won ($9k)
- Jason Dent: 0 won ($0)
CONTENTS

MY SETUP

GET SELLING!

Click to jump around!
Psst... want a checklist?

Keep this checklist on hand while you’re working through your setup!

Do you prefer checking tasks off a list? So do we! Use this handy checklist to make sure that you don’t miss any steps while you’re setting up your Nutshell account.

Click here to get your own setup checklist
MY SETUP

✓ Set up your profile
✓ Connect your email
✓ Connect your phone
✓ Connect your calendar
✓ Choose your notifications
✓ Customize your dashboard
Set up your profile

Customize your profile to make Nutshell feel more like home!

Add up to 5 email addresses right on your profile for unique email outreach. You can also log in with any of those emails, so you’ll never forget your login!

Set your time zone, market, phone code, and weather units to make sure you’re operating with the right location settings.

This will make your life a little easier when it comes to calling, emailing, and adding dollar values to your leads.
Emailing with Nutshell

Should I sync my email?

Syncing your email will pull all of your new emails into Nutshell and attach them to the right people, companies, and open leads.

This is a great way to log your correspondence so that your team always knows exactly where you left off with someone. Never repeat unnecessary information or ask the same questions again!
Email privacy

How can I sync my emails and keep internal communications private?

If you would like to keep your synced emails private, please configure your settings to automatically share “none” of your emails.

You can manually share specific emails by clicking the “share with everyone” button at the bottom of the email.
Email privacy

How do I know which emails my colleagues can see?

Private emails are surrounded by a black dotted line and cannot be viewed by anyone but you. In your inbox, they have a “private” tag.

Public emails are in a light blue box and have a red and white stripe down the left side. These can be seen by everyone.
Email privacy

How do I keep private conversations out of Nutshell?

Add email addresses to your blacklist to prevent any correspondence with that person from being added to Nutshell.

Internal emails between Nutshell users will never be shared.
Connect your phone

Set up your phone so that you can click any phone number in Nutshell and call right away. Make phone outreach a breeze!

You’ll never have to dial a number again! Once you’re finished, log those calls so that your manager knows how hard you’re working each day. You can even record calls to share with the team.

Not a Nutshell Pro user? Connect RingCentral, Kixie, or Skype.
Connect your calendar

Sync Nutshell with your external calendar so that your activities appear in both places without doing double data entry!

When you sync your calendar with Nutshell, you’re able to schedule activities in one place and still see them everywhere you need them.

Events you create in your Google or Office 365 calendar will come into Nutshell and your Nutshell activities will appear on your personal calendar.
Choose your notifications

Choose how and when you’d like to receive alerts for specific things that happen in Nutshell.

Set up notifications so that you’re always up to speed on things, like when a lead is assigned to you or you have 30 minutes until your next scheduled activity.

You can receive notifications inside of Nutshell, by email, and on your phone.
Customize your dashboard

Create dashboard cards to easily track the information that matters most to you!

We like to add things like list of your hot leads, your sales for the month, and lists of overdue leads.
1. Add a company and a person READ>
2. Create a lead READ>
3. Create activities and tasks READ>
4. How to use the dashboard READ>
5. Report on your sales READ>
STILL HAVE QUESTIONS?

Contact us!

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(888) 336-8808