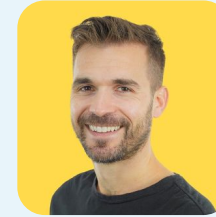




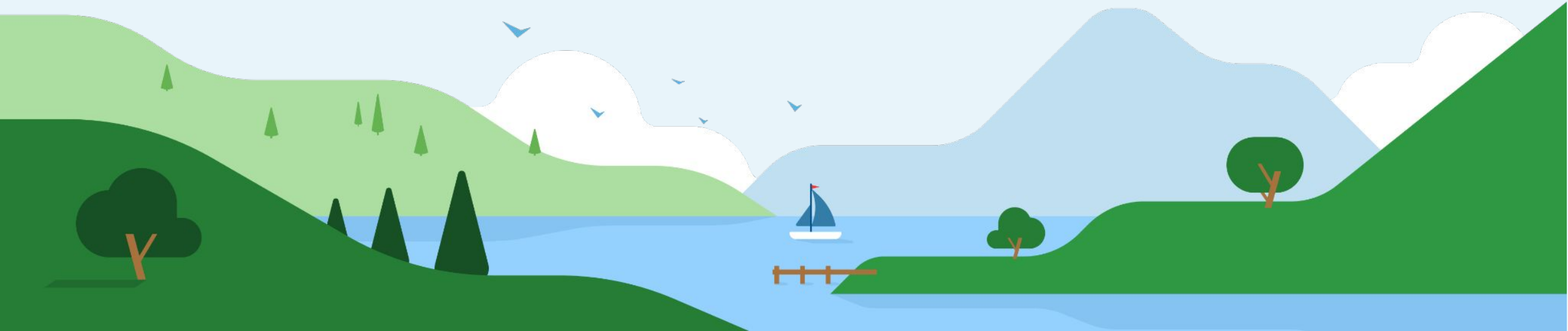
2026 Summer Roadmap

Recap Nutshell's top launches from the first half of the year
and look at new features coming this Summer



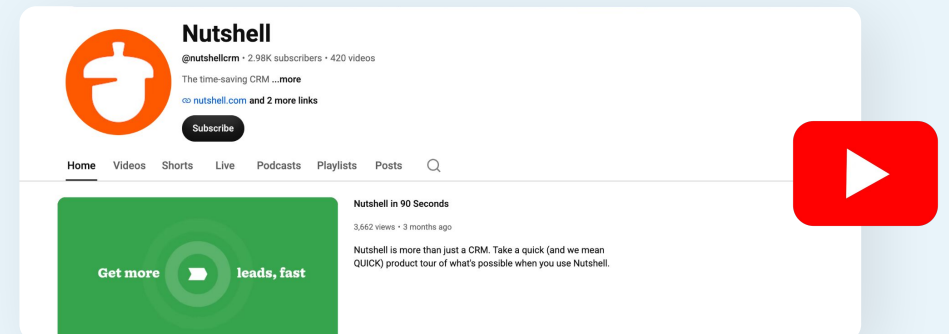
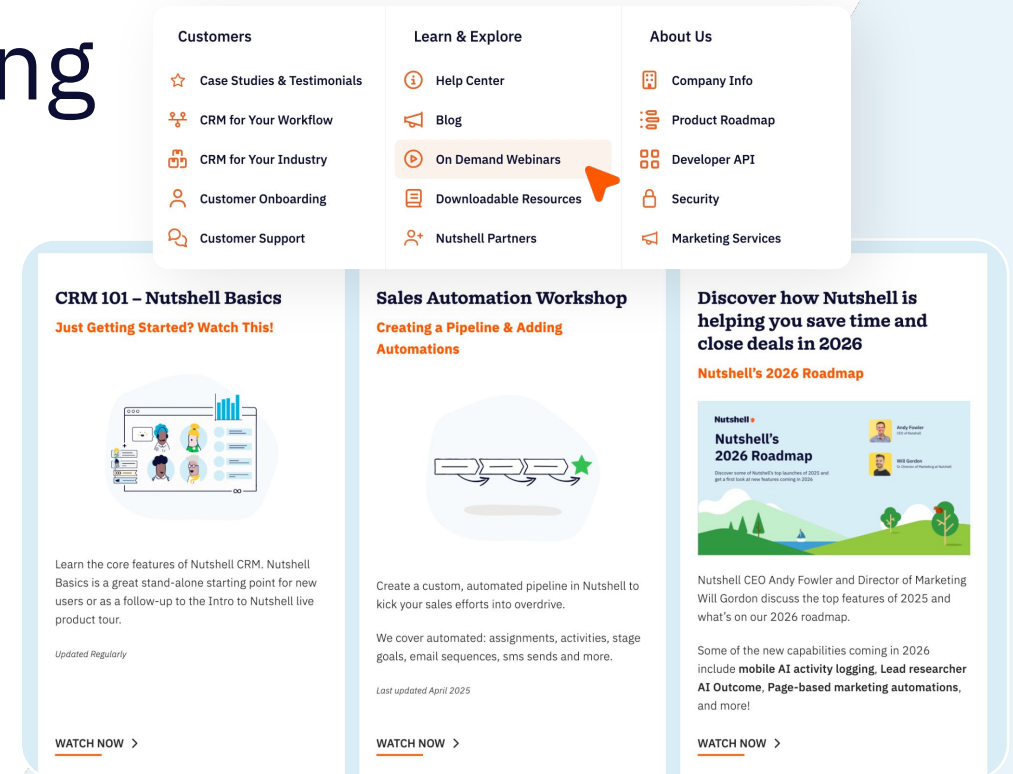
Will Gordon

Sr. Director of Marketing at Nutshell



If You Don't Get The Recording

- Check your email spam folder
- Not there? Head to our [Webinars & Guided Tours page](#) to find this and all past webinars
- Note: You can also subscribe to the [Nutshell YouTube Channel](#) to ensure you get notified whenever we publish a new video.



What We'll Cover Today

- | | |
|---|-------------|
| → What Launched in the first half of 2026 | ~5 minutes |
| → Headstart Sprint! | ~5 minutes |
| → 2026 Summer Roadmap | ~25 minutes |
| → Q&A | ~10 minutes |

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



Past Year Recap: 2026 ¹/₂ Shipping News



- Admin email digests
- User email digests
- AI-powered mobile activity logging
- Page-based marketing automations
- Google Analytics 4 (GA4) integration
- AI Chatbot report
- SMS Audiences
- Shared email inbox
- Multi-page forms
- Branching forms
- Custom field merge tags in Personal emails
- Nutshell chatbot enhancements
- Scheduled sending for Personal emails
- Recurring tasks flexibility
- Per-user sales quotas
- Add a Google Meet, Teams or Zoom to an activity
- Invite attendees to an Activity
- Numeric custom fields
- Scheduled exports
- Revenue value installments
- Bulk duplicate cleanup
- Search bar improvements
- AI lead summaries
- Improved CSV importing
- Sales documents & e-signing (Proposals & Invoices)

[View all of our Product Updates](#)



More visibility for Product Updates

Keeping you up to date to get the most out of Nutshell

⚡ Explore

Good morning, Will!

Explore updates, features and upcoming events — all in one place.



Recent product updates

[See all updates](#)



Chatbot report

Analyze your chatbot's performance and common inquiry topics.

[Learn more](#)



Scheduler report

Analyze booking trends and statistics for your scheduler meetings.

[Learn more](#)



AI follow-up tasks

Automatically capture action items from meeting conversations and turn them into tangible tasks in Nutshell.

[Learn more](#)

Get the most of out Nutshell



Join tomorrow's webinar at 3:00pm EST

Don't miss your chance to see Nutshell in action.

[Register](#)

[Show other items](#)



Send emails in Nutshell

Get set up to send emails directly from Nutshell—no more switching apps.

[To explore](#)



☐ Connect your email account



☐ Send your first mail from Nutshell



☐ Create a personal email sequence



☐ Enroll someone in your email sequence



☐ Working with activities in Nutshell

[Learn more](#)



☐ Activity report

[Learn more](#)



Book meetings with Scheduler

Connect your calendar and let prospects book time with you.

[To explore](#)



Call directly from Nutshell

Make calls without leaving Nutshell and keep everything logged automatically.

[To explore](#)

[Back](#)

[Visit our Knowledge Base](#)

Nutshell Updates

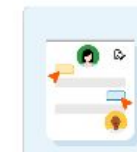
Welcome to our updates page! Discover how you can enhance your experience with Nutshell by checking out the latest features.

[Watch our latest webinar](#)



Recent releases

New features and improvements we've shipped to Nutshell.



Contracts and e-signing

Jun 10, 2020

Build reusable contract templates, send them straight from a lead for e-signature.

[Learn more](#)

Installment revenue on leads

Recognize revenue when it actually lands, not when the deal closes.



When your deals are structured to receive payments in installments, such as monthly billing for annual contracts, retainers, implementation fees, and ongoing subscriptions, it can create a mismatch between your CRM system and the actual invoicing practices of your finance team.

This discrepancy often leads to confusion and inefficiencies in tracking revenue and managing client relationships.

[Learn more](#)



New: Recurring tasks

Jun 4, 2020

Schedule a task to repeat daily, weekly, or monthly and Nutshell will create the next instance automatically.

[Learn more](#)

Previous updates



Chatbot report

3 Jun 10, 2020

Analyze your chatbot's performance and common inquiry topics.

[Learn more](#)



Scheduler report

3 Jun 10, 2020

Analyze booking trends and statistics for your scheduler meetings.

[Learn more](#)



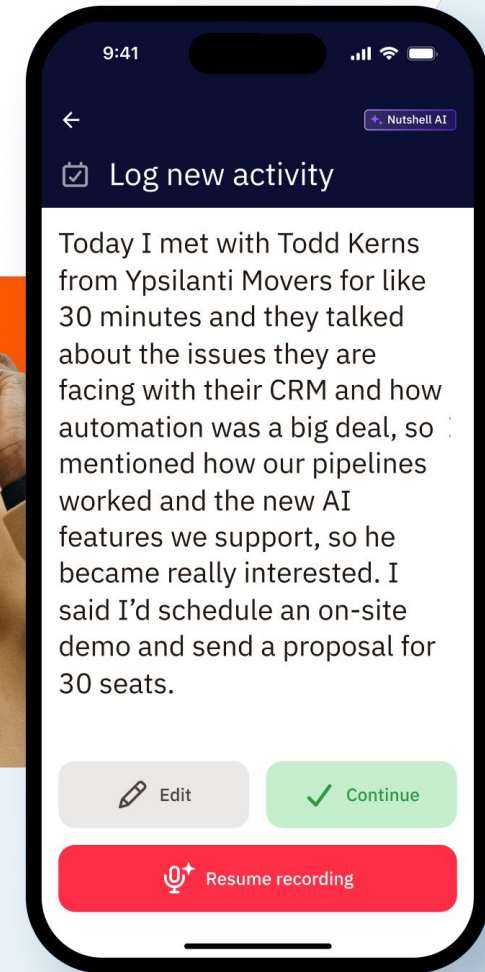
AI follow-up tasks

3 Jun 10, 2020

Automatically capture action items from meeting conversations and turn them into tangible tasks in Nutshell.

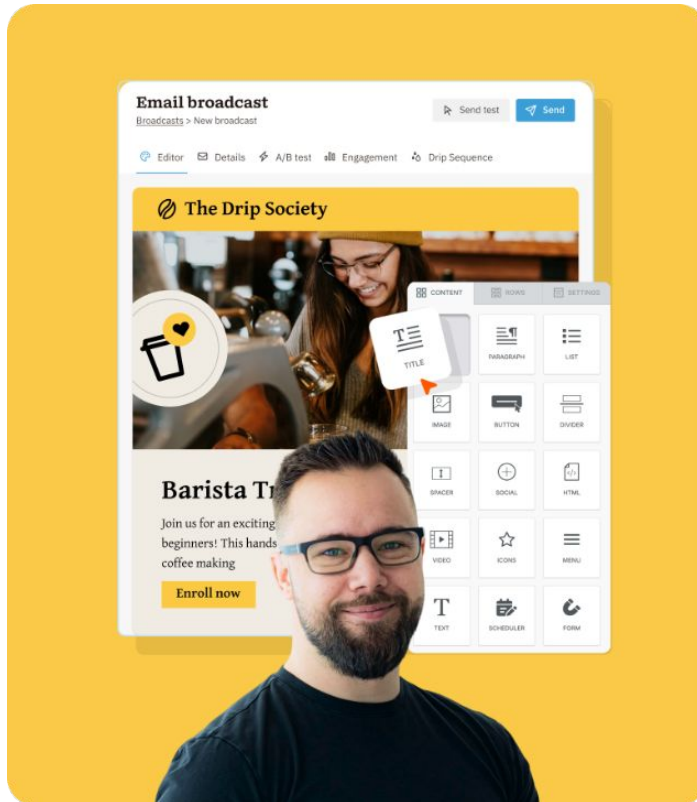
[Learn more](#)

Our focus is on you.

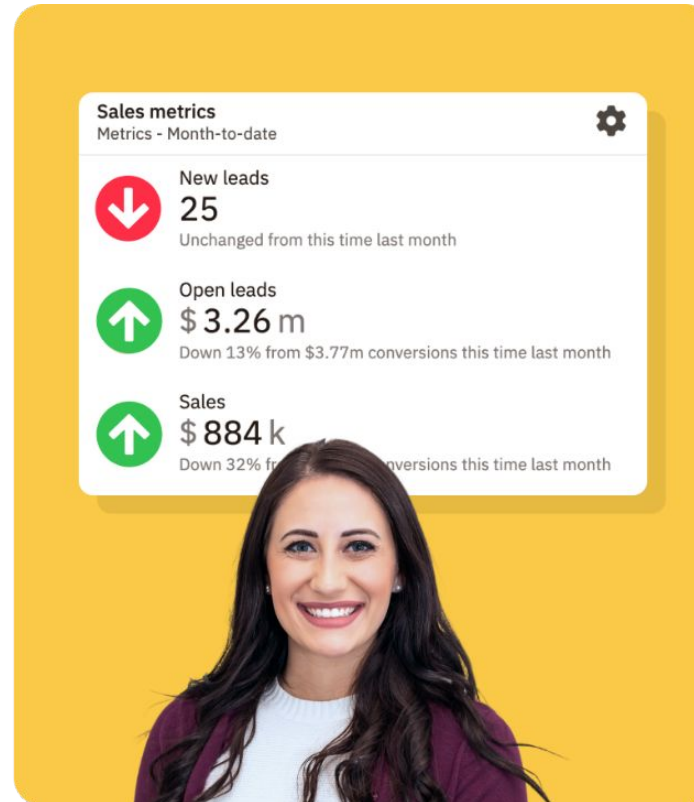


Your Success is our WHY

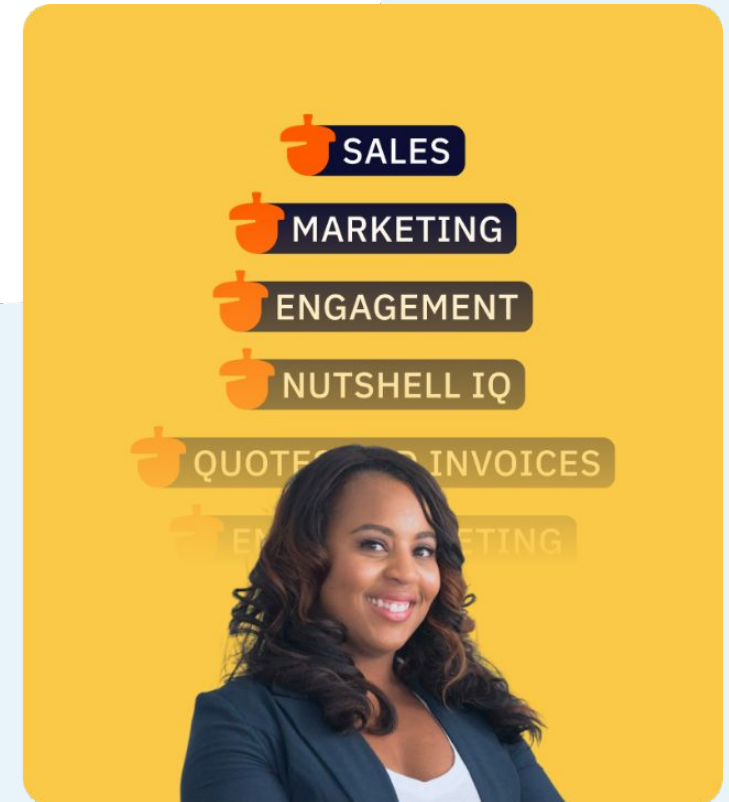
Keep Nutshell **intuitive and easy to use**



Minimize admin tasks & **enhance your sales-related tasks**



Continue to connect Nutshell to your critical business systems.



Summer 2026 Roadmap



Summer Hackathon

A head start, heads down **SPRINT** to make Nutshell even better.

- Decimal places for product quantities
- One-click ChatGPT integration
- One-click Claude integration
- Person / Company page beautification
 - ◆ Styling updates for better contrast, hover states and customization layout entry points.
- More control over activity invitations
- Nutshell Forms page loads faster
- Nutshell Invoices push to Quickbooks - *80% done*
- Scrollbar clean up
- Updated “Add new”
- Dashboard task filters
 - ◆ Filter by pipeline + a search bar
- Multiple Quote templates



Summer Hackathon

Launched

+ Add new

Company

Organizations you do business with

Quote

Create and send sales quotes

Email campaign

Create and send beautiful messages

Person

Individuals you do business with

Invoice

Create and send invoices

SMS

Send text messages to contacts

Lead

Potential sales opportunities

Document

Send proposals and sign contracts

Landing page

Create pages that capture leads

Activity

Calls, meetings, and interactions

Form

Collect leads from your website

Task

Reminders and follow-up actions

Import

Import existing data into Nutshell

Aimee Clarke

Ms. Aimee Clarke

Purchaser, 3M

+1 847-544-1909

aclarke@3m.com

Contacted Jul 10th, 2026

Activities

Tasks

Timeline

Type

Assignee: Jared Knotts

☐ Only hot leads

Filter by pipeline...

trial

Past

Today

Tomorrow

Future

0

0

4

31

Tomorrow: July 14th

The Nutshell logo, which is a stylized orange figure with its arms raised, resembling a person or a robot.

**Coming this
summer...**

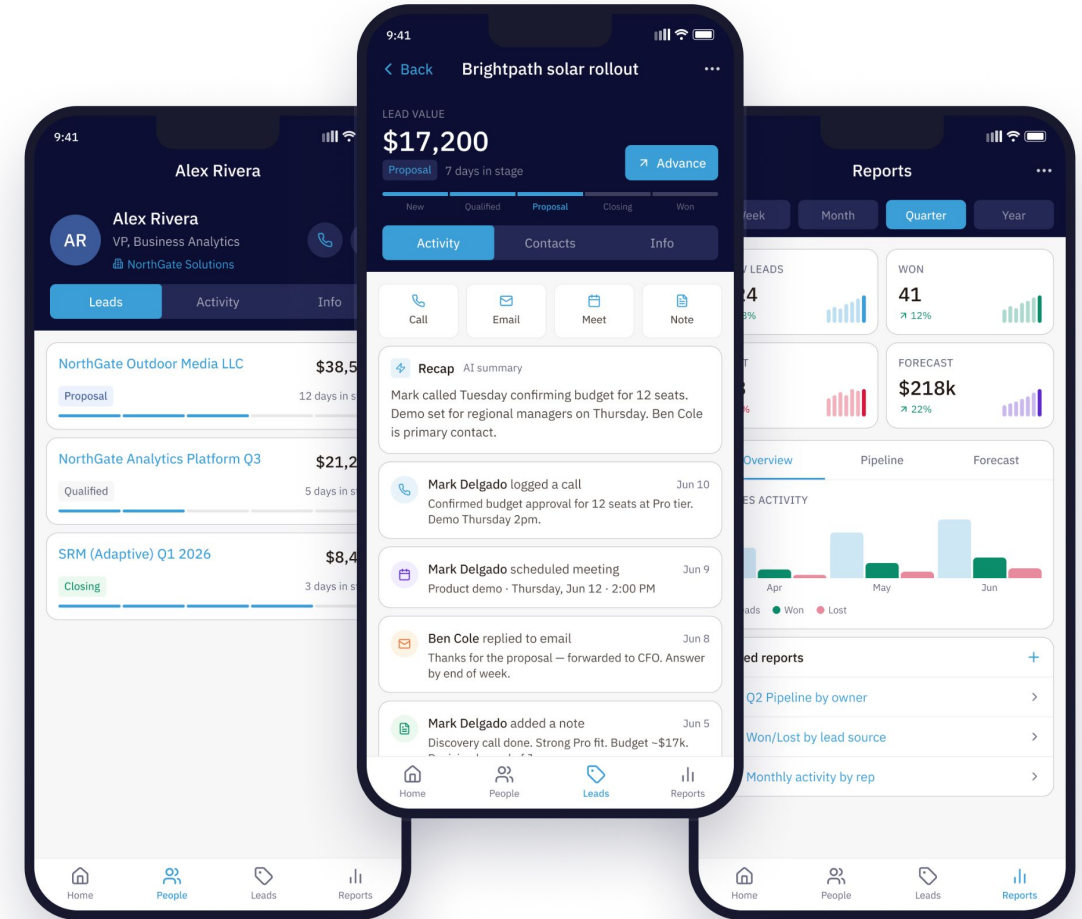


Mobile App: Modernizing the Mobile App

More than just a coat of paint!

- A rebuild from the ground up to make future updates more streamlined
- Updated Home screen: Task dashboard
- Updated UX for App pages and Search feature
- Easier to create leads and access to more reports
- Click-to-call & email directly from the App
- Ability to view more features
 - ◆ Quotes, Invoices, Documents, Timeline recaps, etc.
- SMS from mobile

This project kicked off in July 2026. This is not a complete list and not all components will be launched by the end of Q3, but we plan to continue the improvements once the groundwork is complete.



Forms: “Other” Flow

Get more information.

→ **Previously:**

- ◆ Answering “Other” branches to a separate page in the form

→ **Now live:**

- ◆ Lead can fill out what “Other” is without going to another page.
- ◆ more of a win is having a second value to “other”

The screenshot displays the 'Customer Profiling' form editor interface. The main form area shows a 'Summer activity' section with a question 'What is your favorite ice cream?' and four radio button options: Strawberry, Chocolate, Vanilla, and Other. The 'Other' option is followed by a text input field. A 'Submit' button is located at the bottom right of the form. Below the form is a dashed box with a plus icon and the text 'Add a page'.

The right sidebar shows the 'Field settings' for the selected field. It includes the following options:

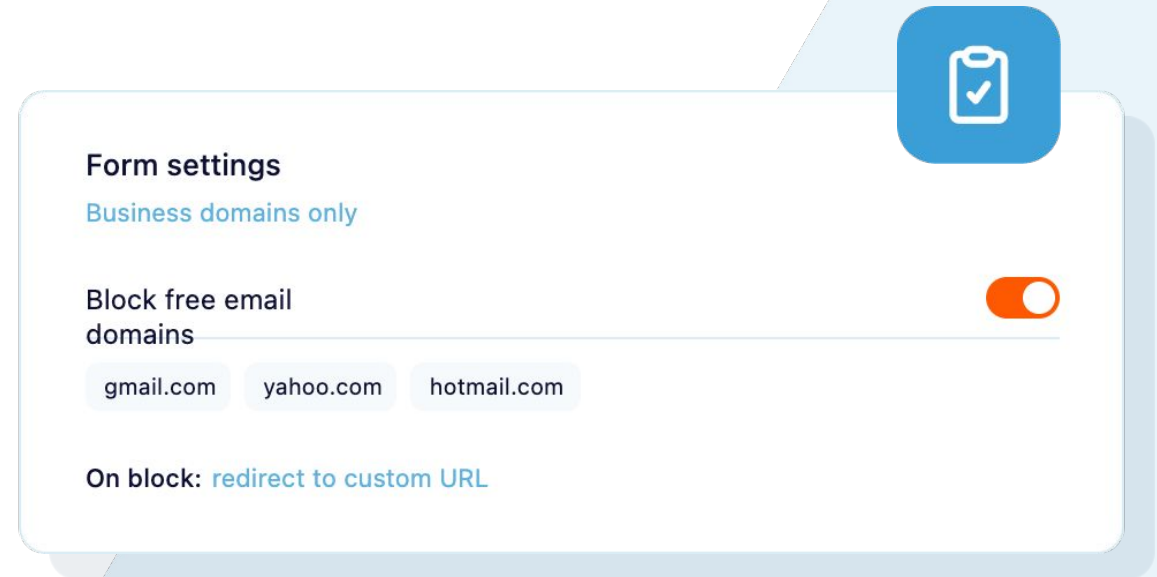
- Required:** A toggle switch that is currently turned on.
- Label:** A text input field containing 'What is your favorite ice cream?'.
- Entity:** A dropdown menu showing 'Person'.
- Field options:** A list of three options: 'Strawberry', 'Chocolate', and 'Vanilla'. An 'Edit' link is next to this section.
- Add "Other":** A toggle switch that is currently turned on.
- Mapping:** A section with an orange arrow icon and text stating 'This field maps to the What is your favorite ice cream field in Nutshell.'
- Additional rules:** Two checkboxes: 'Update person based on the answer to this question' and 'Pre-select an answer to this question', both of which are currently unchecked.

A green diagonal banner in the top right corner of the image contains the word 'Launched' in white text.

Forms: Filter less qualified leads

Segment or Filter for Business emails

- If you get low quality leads (maybe not quite spam) from people with free email addresses.
- Filter through a different pipeline



The image shows a 'Form settings' dialog box with a blue header bar containing a white clipboard icon with a checkmark. The settings are as follows:

- Form settings**
 - [Business domains only](#)
- Block free email domains** (toggle is turned on)
 - gmail.com
 - yahoo.com
 - hotmail.com
- On block:** [redirect to custom URL](#)

VisitorIQ: More customization

More filters = More impactful

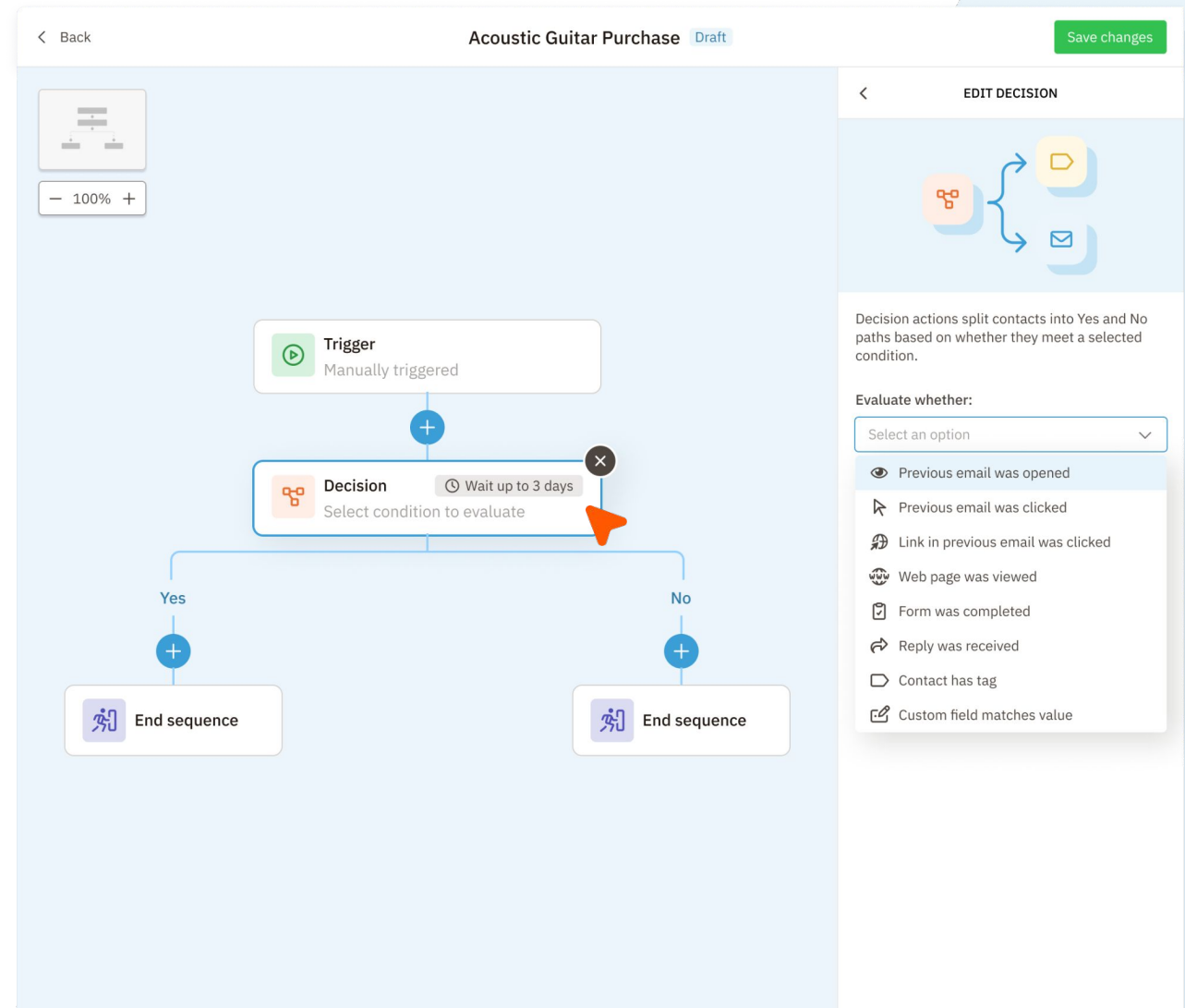
- Add “URL” as a filter
 - ◆ For companies that visit your high-intent pages
- Filter by *most recent visit*
- Get notified when an Ideal Customer hits your sight
 - ◆ Filter set
 - ◆ Notifications on
 - ◆ Get a notification to unlock and work the lead



Email marketing: Smart sequences

Make your Marketing follow ups even more effective

- Email drip follows a different sequence based on what the recipient does
 - ◆ Opens email
 - ◆ Clicks email
 - ◆ Visits a specific web page
 - ◆ Fills out a form
- More triggers available with our Node editor



Sales: Calculated custom fields

Math, automated for you.

- Calculate
 - ◆ Totals
 - ◆ Averages
- If/Then functionality



Sales: Private pipelines

More Admin controls over who can see Pipelines

- Mark a pipeline as “limited visibility”
- Decide which users or teams have access to “limited visibility” pipelines
- Admins can see a list of all pipelines marked as “limited visibility”
- Users without access to a pipeline can’t see:
 - ◆ the pipeline
 - ◆ the leads in that pipeline

Pipelines 5/5
Manage your team's sales process and pipelines

Active Drafts

Trial: demo-drive sales ☆ Default 👤 Everyone 0 leads

Qualifying 1:Many Demo Schedule a demo

#3 pipeline Active 👤 Everyone 65 open leads Manage visibility Add

Discovery/Start trial Start trial/Demo Close/Start trial

#4 pipeline Active 👤 Everyone 98 open leads Manage visibility Add

Discovery/Start trial Start trial/Demo Close/Start trial

#4 pipeline Active 👤 9 people 10 open leads Manage visibility Edit

Discovery/Start trial Start trial/Demo Close/Start trial

Cancel Manage pipeline visibility Save







Choose who can access this pipeline. Anyone with access can view the pipeline and all associated leads, companies, and people.

☐ Specific users ☒ Everyone

Everyone will be able to see #3 pipeline

Sales: “Away” status for Lead assignment

Round Robin around your team’s schedules

- Sales reps can set their status as “Away”
- They’ll get skipped in the Round Robin rotation until resetting their status to “Active”
- Great for when:
 - ◆ Reps go on vacation
 - ◆ Need to focus on a larger deal



Lead assignment queue

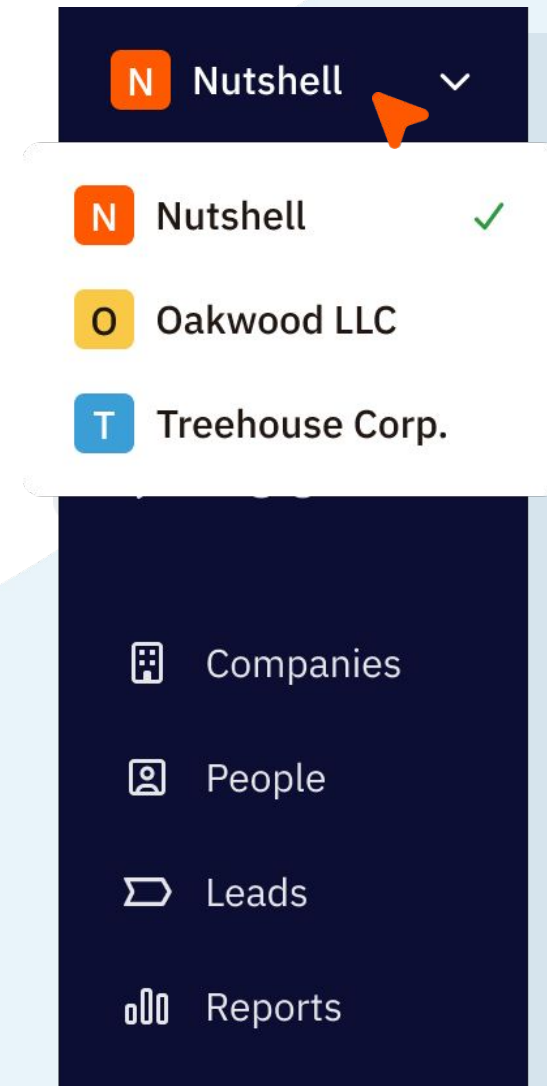
JD	Jordan Diaz	Active
MK	Maya Kim	Away, leads paused



Multi-account login switcher

Great for:

- Consultants with multiple clients using Nutshell
- Business owners with multiple businesses
- Switch between accounts without having to log out



AI: MCP *Write* Functionality

Do more with Nutshell's MCP server

→ Current:

- ◆ Read-only: LLMs can access your data for deep analysis

→ Coming soon:

- ◆ **Write:** once you done with your analysis, push data and information back into Nutshell from Claude and ChatGPT



Move the Treehouse Co. deal to Proposal and log today's call



Updated stage to Proposals and logged your call.



Integrations: Integrations, Integrations

More connection, less work.

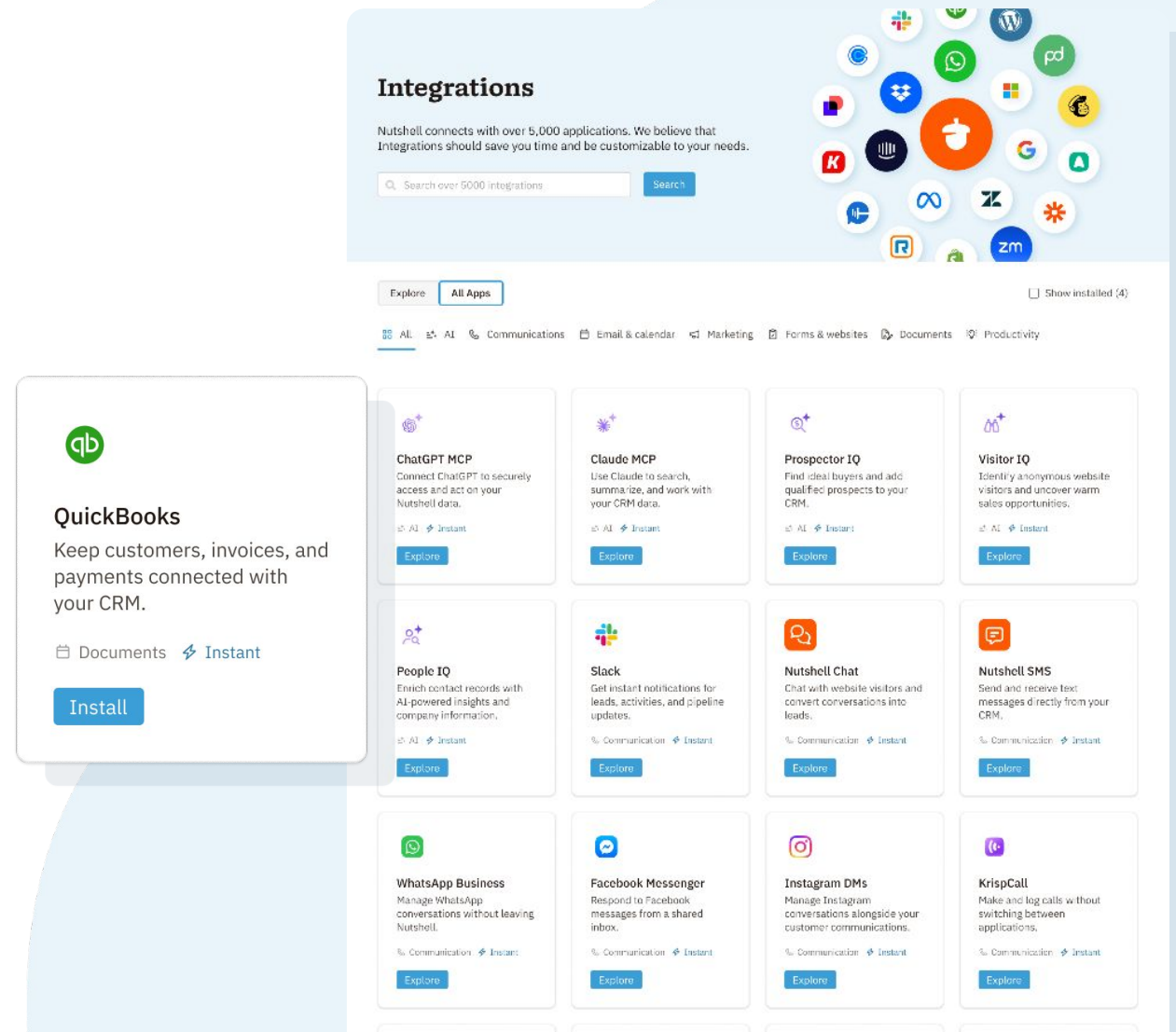
→ Integrations with other applications allow for

- ◆ Less data entry
- ◆ Real-time accuracy
- ◆ Smarter automation

→ Adding to our Library of Integrations

- ◆ Improving Quickbooks
- ◆ Finalizing a sub-roadmap for integrations
- ◆ You can always reach out about a [custom integration](#)

→ Easier to navigate integrations in app



Try All Features

Try before you buy!

- Some of our customers have been with us since we only had CRM plans.
- Even new customers may not have enough time to try **everything** in a 14 day trial
- This update will allow you to trial additional Nutshell features before purchasing or upgrading.



You are previewing:

Engagement  **PRO**

12 of 14 days left



- ✓ 1:1 SMS conversations
- ✓ Dedicated business phone number
- ✓ Facebook, Instagram & WhatsApp messaging
- ✓ Shared inbox centralizing lead communications
- ✓ Custom chat widget branding

#NutshellCRMSummer

- Mobile App Upgrades
- Forms: “Other” flow
- Forms: Filter less qualified leads
- VisitorIQ Upgrades
- Email marketing: Smart sequences
- Calculated custom fields
- Pipeline visibility controls
- “Away” status for Lead assignment
- Multi-account login switcher
- MCP write functionality
- Integrations
- ‘Try All’ Features

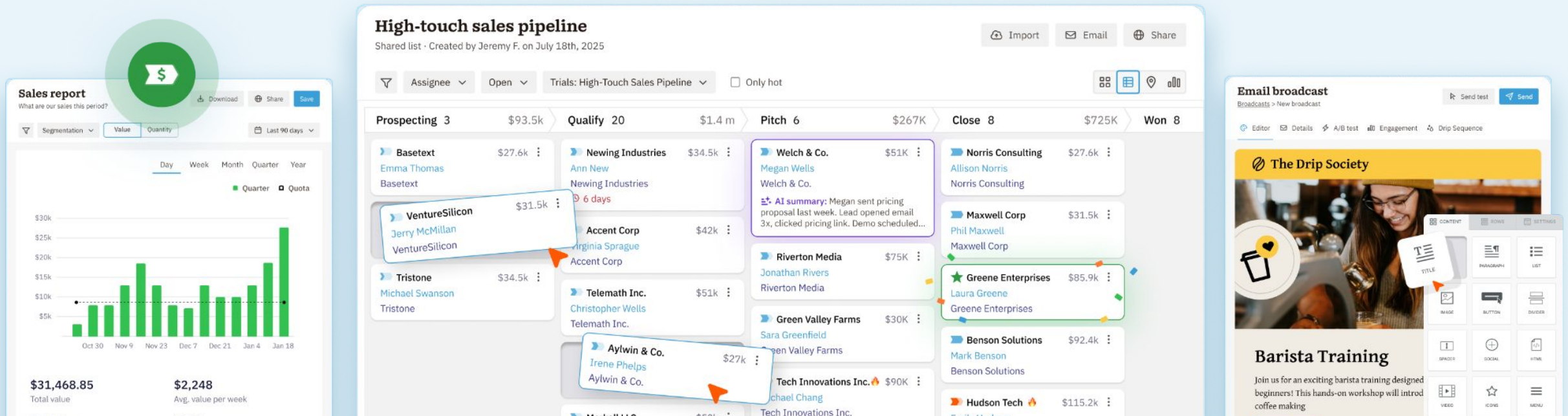


Resources

Stay up to date with our feature releases by keeping an eye on our [Product Updates & Enhancements](#) page or signing up for our [Shipping News](#) newsletter.

Need help getting started? Check out our [comprehensive support articles](#) or [reach out to our support team](#) for more information.

Want to get early access or be part of a future beta release? Email us at beta@nutshell.com to be on our shortlist for feature early releases.



Q&A

**Have any questions
about our recent or
upcoming feature
launches?**





Thanks for joining us today!

Discover more features, resources, and updates at:

nutshell.com

