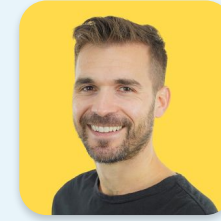




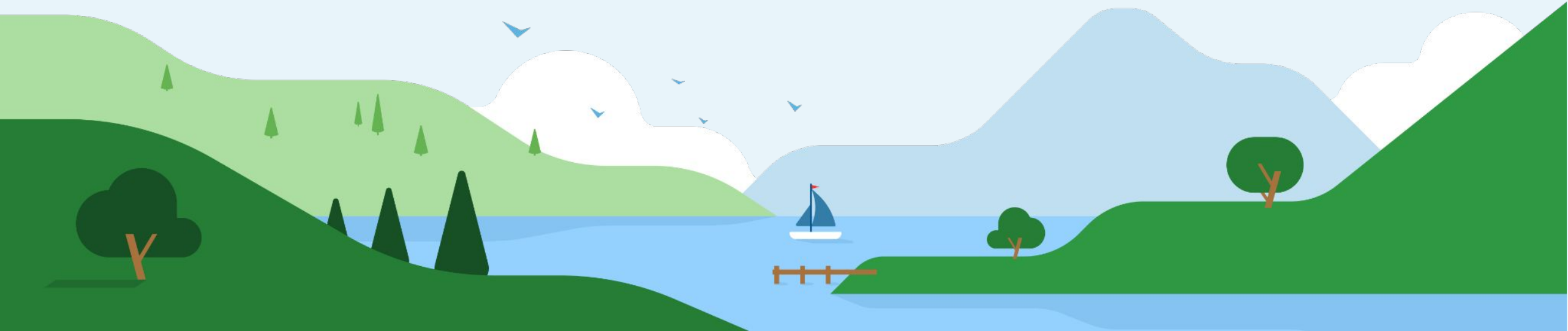
Nutshell's Mobile App

Nutshell works where you work.



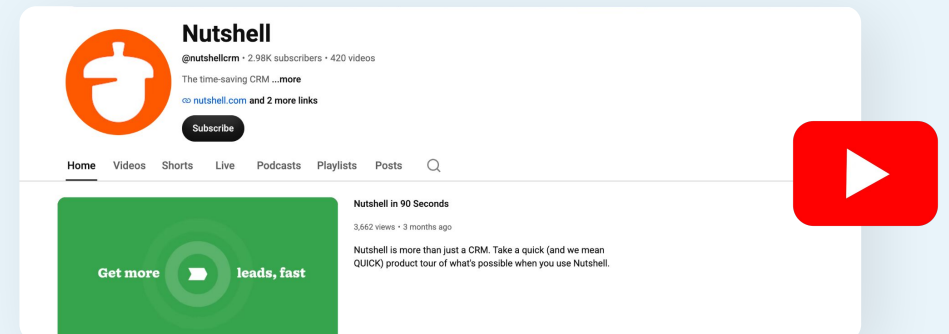
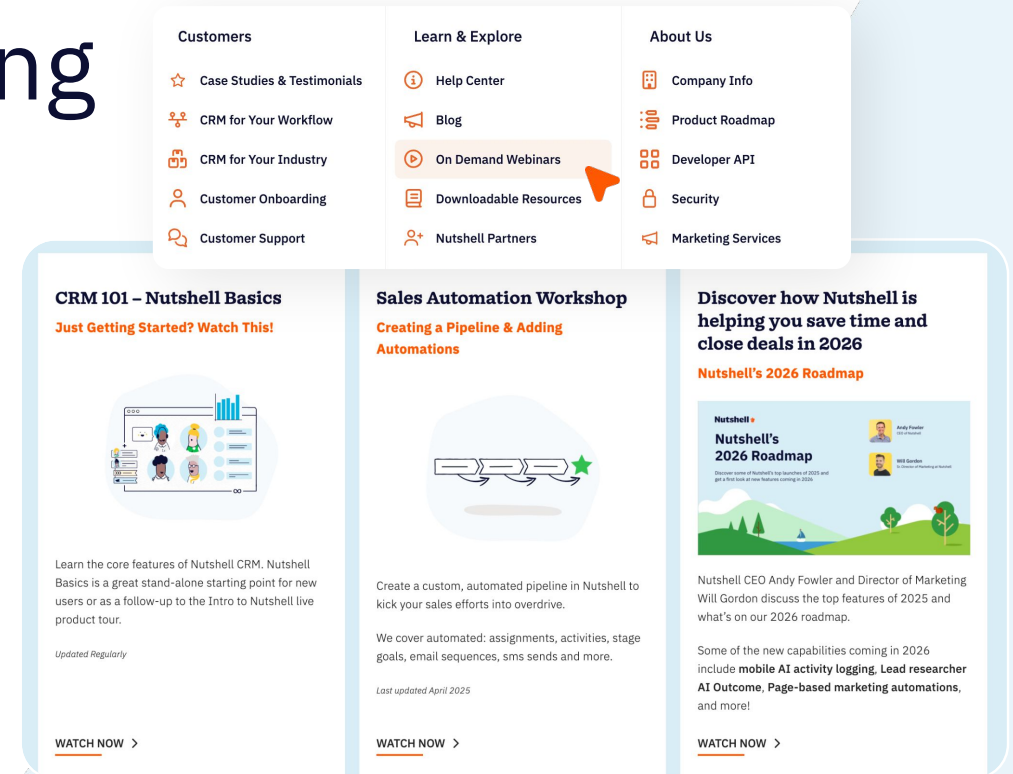
Will Gordon

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 most past webinars
- Note: You can also subscribe to the [Nutshell YouTube Channel](#) to ensure you get notified whenever we publish a new video.



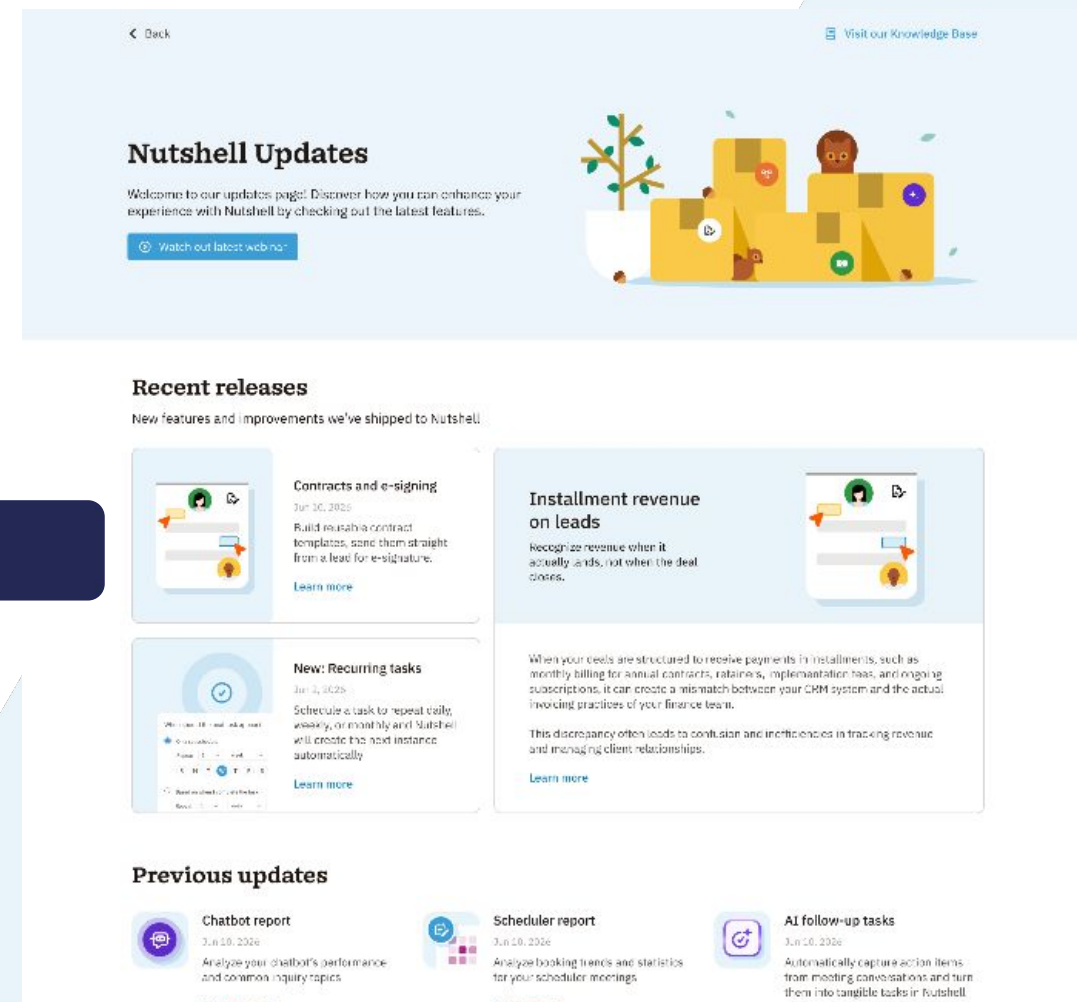
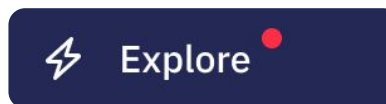
Recent & upcoming releases

Launched

- Improved Quickbooks integration
- Calculated custom fields
- Away status for lead assignment
- Multi-account switcher
- Email domain filters on Nutshell forms
- Pinned contacts
- New Mobile App

Next Up

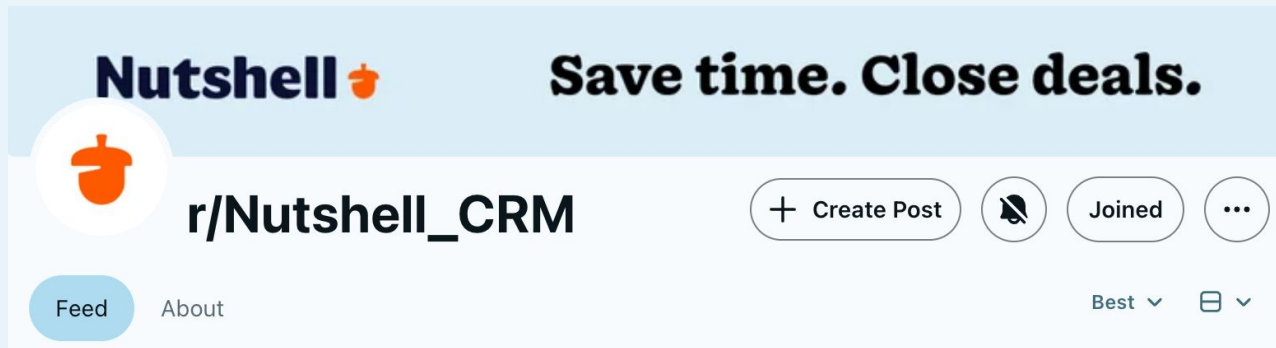
- VisitorIQ enhancements
- Additional SMS capabilities
- Proposals & Invoices enhancements
- & more



[View all of our Product Updates](#)

Join the Community

Tips, advice, & ideas



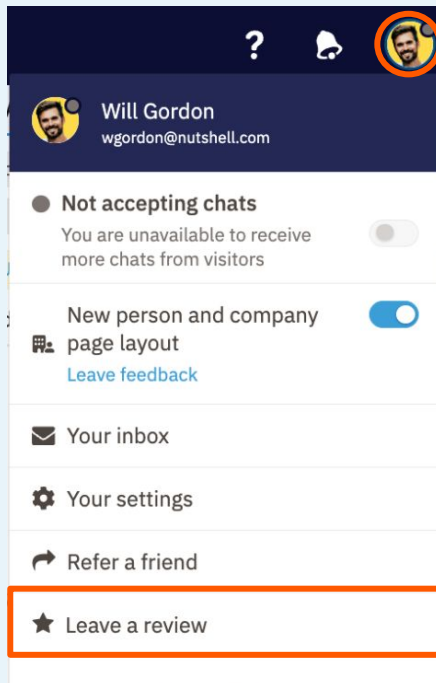
- Share and learn about how to get the most out of Nutshell
- Ask the Nutshell community for advice

Join the subreddit



Enjoying Nutshell?

Let us and others know!



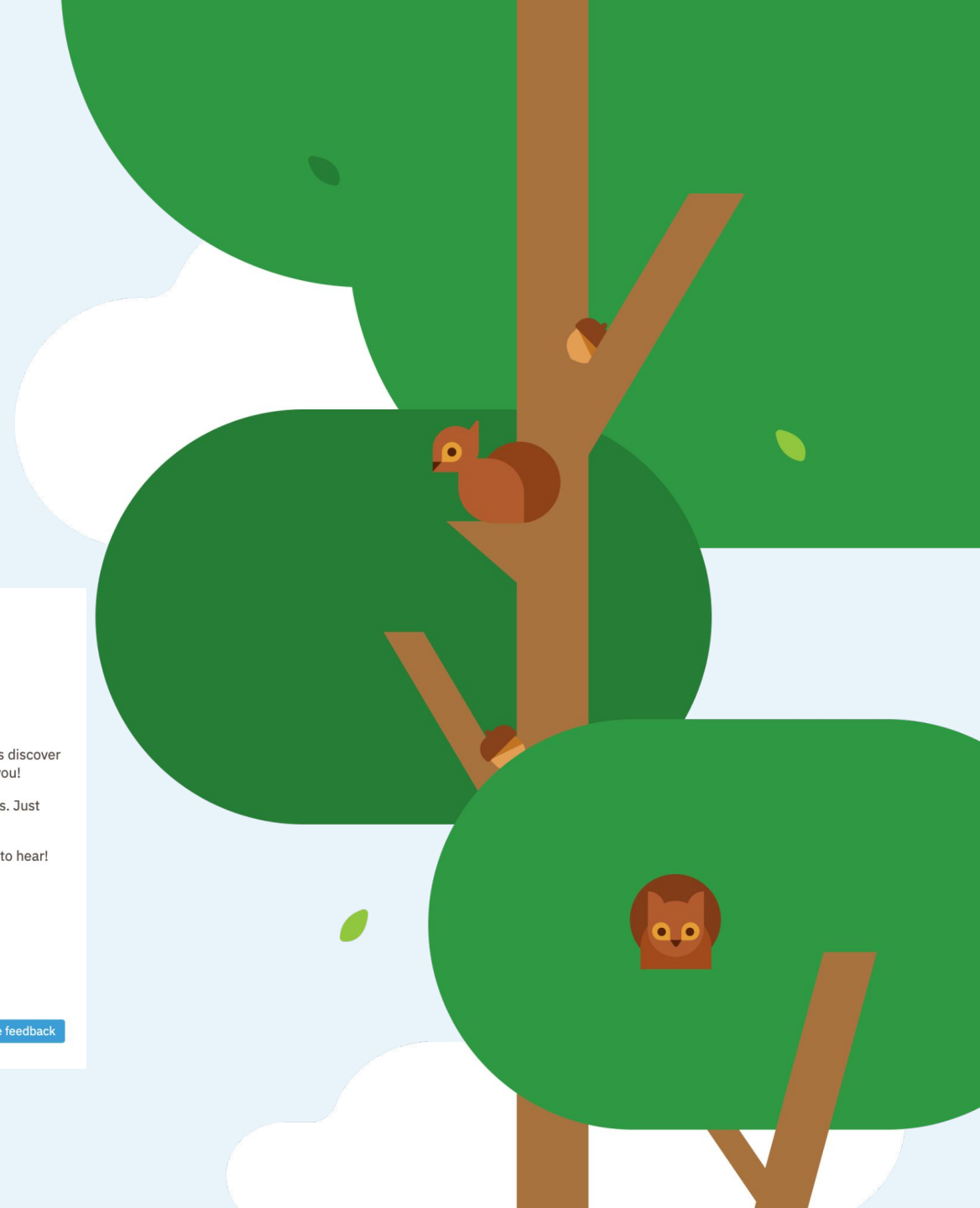
Do you love using Nutshell?

A positive review helps more businesses discover Nutshell, leading to better features for you!

Leaving a review takes under 10 minutes. Just click 'Leave a review'.

Got feedback or ideas for us? We'd love to hear! Click 'Share feedback' to let us know.

[Leave a review](#) [Share feedback](#)



What We'll Cover Today

- Mobile App walk through ~20 minutes
- What you ~~can't~~ don't want to do on mobile ~5 minutes
- What's next for the mobile app ~5 minutes
- Q&A ~10 minutes

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



Nutshell works where you work.

A quick history & what's new



History of the Nutshell Mobile App

- First launched in 2010
- First CRM with an Android mobile app
- Included a business card scanner
- Gave you all the People, Company, and Lead info you needed while on the go
- Add new People, Company, or Lead records
- Is, and always will be available to all customers, included with all plans



Summary of What's New

- New login flow
- New notifications panel
- Recently-viewed & search screen
- Improved AI activity logging
- Updated home screen
 - ◆ Task, Activities, and calendar
- Updated Company, People, and Lead pages
- File uploads / downloads:
 - ◆ Add image to contact profile
 - ◆ Upload/download attachments to leads
- View complete record timelines
- Email + activity viewing / editing
- Improved Business Card Scanner
- Updated “Add new” flow
 - ◆ Can create Lead, Person, and Company at the same time
 - ◆ Can also add products, tags, and fields
- Can view quotes, invoices, and sales documents
- Reactions and @ mentions on timelines
- Timeline actions include:
 - ◆ Log - Note - Email - Call
- Admins can view User profiles
 - ◆ See tasks, activities, and pre-filtered reports
- Improved Map view
- Dark mode available



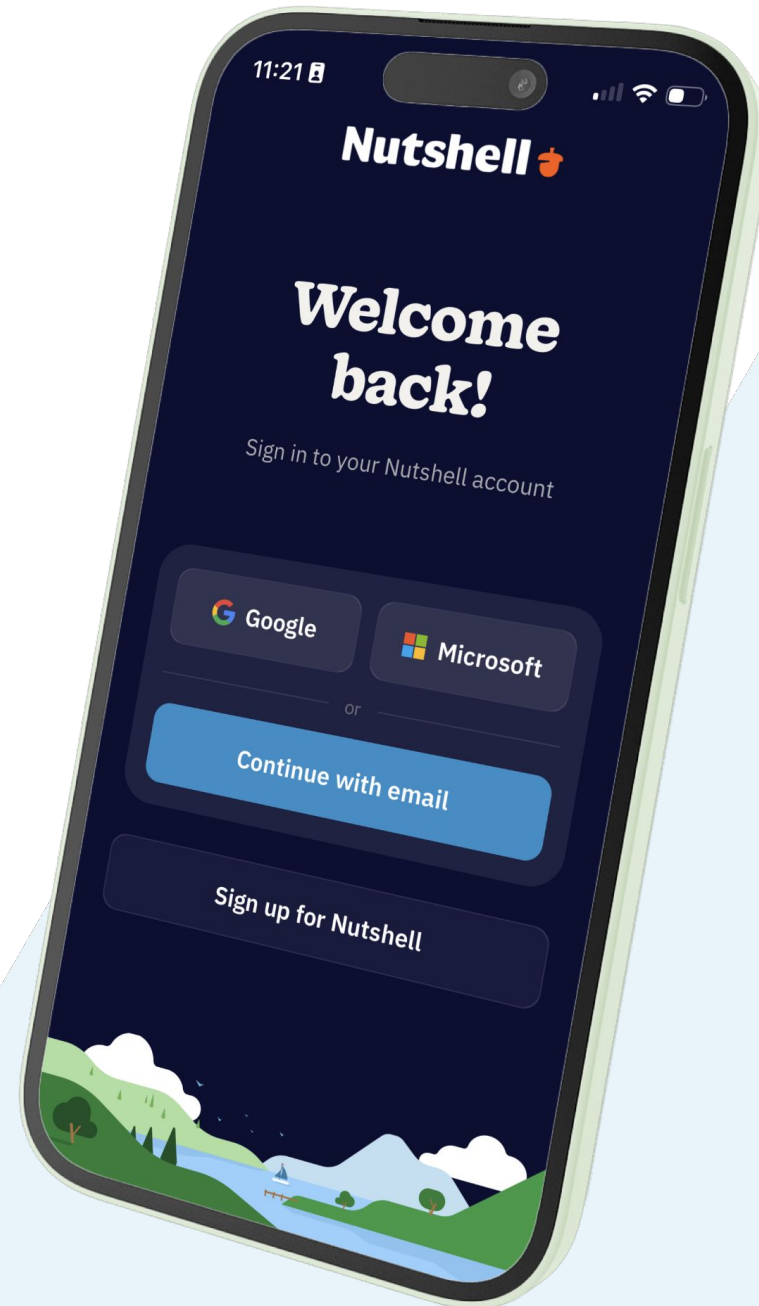
Navigating the App

Logging in and where to click



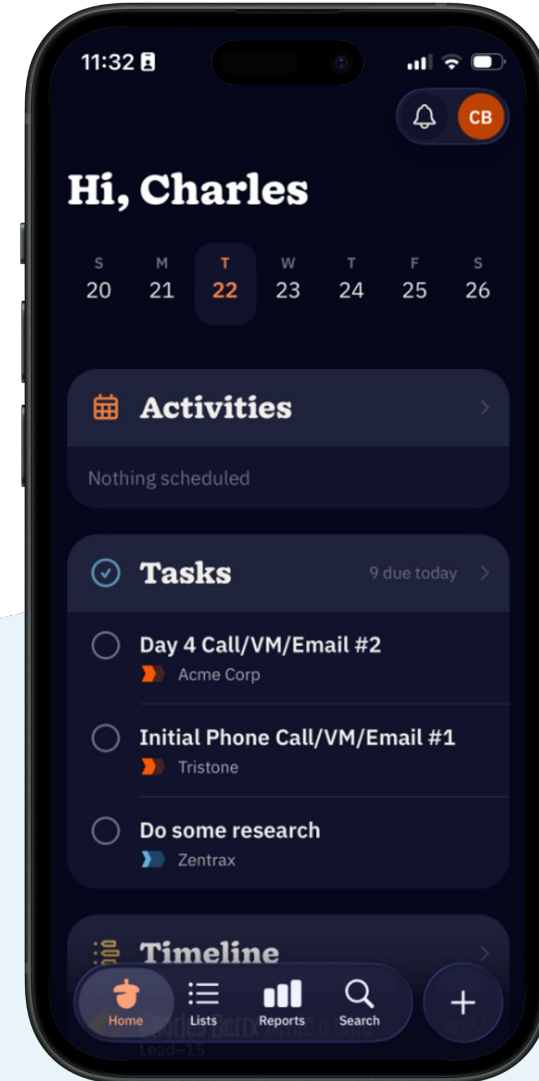
The login screen

- Same flow as logging in from your browser
 - ◆ Login with email
 - ◆ Login with Google
 - ◆ Login with Microsoft



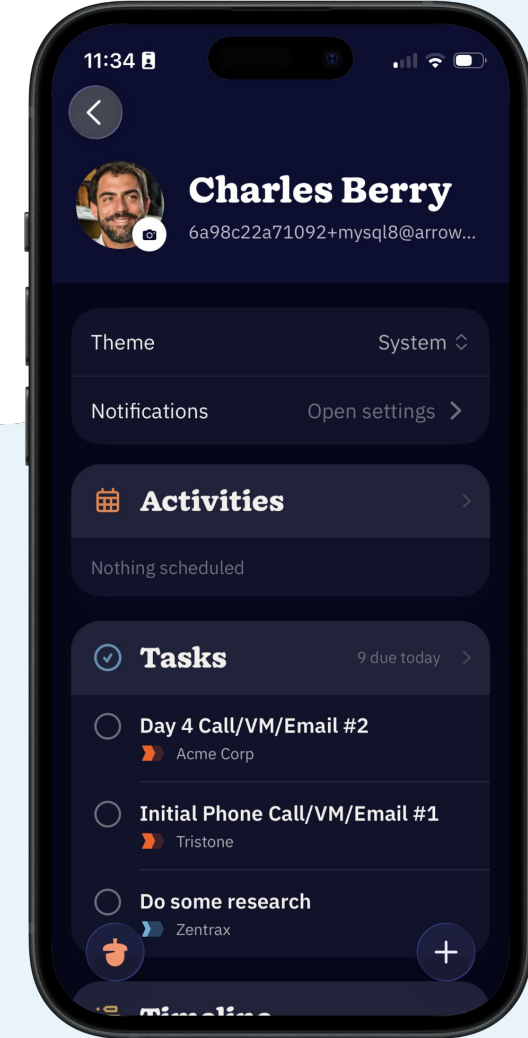
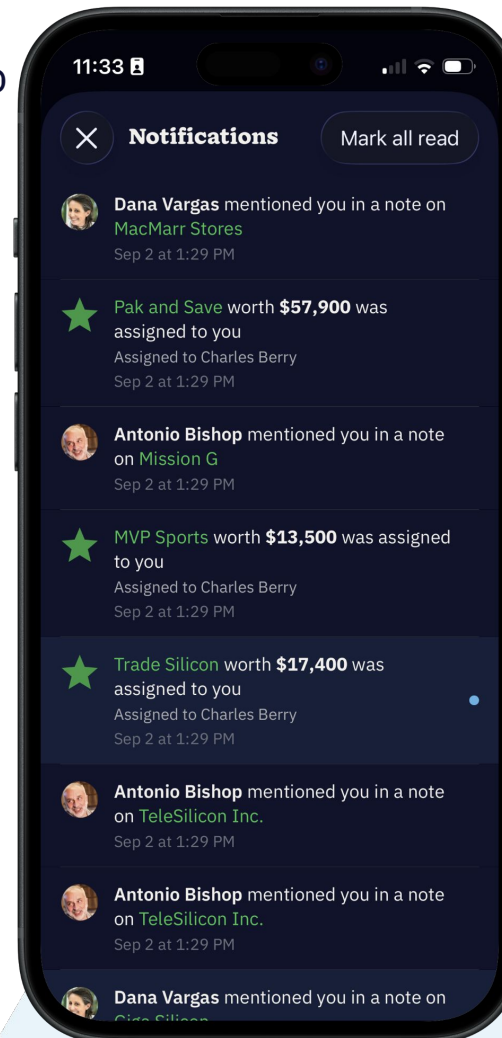
The Homescreen

- Visuals similar to desktop Sales dashboard
- Main view includes
 - ◆ Activities
 - ◆ Tasks
 - ◆ Timeline
- You can click on any to expand for more information
- Change the date to see future activities



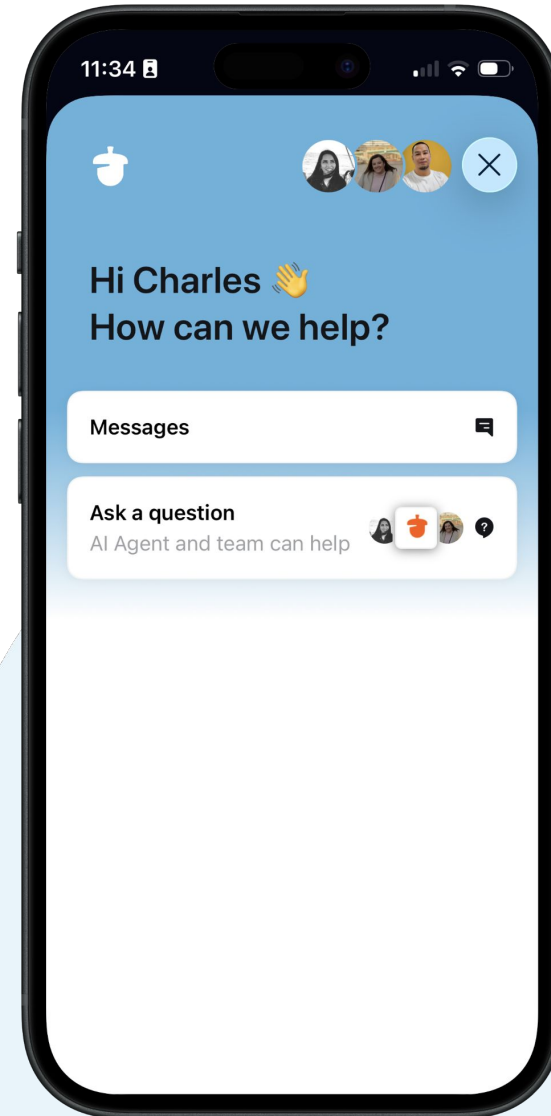
Notifications, Profile, & Help Center

- Access Notifications from home screen
 - ◆ Control notification settings from desktop App and phone settings
- Profile settings
 - ◆ Update your photo
 - ◆ Light mode / dark mode
 - ◆ More to come as we add more features
- Nutshell support
 - ◆ Full access to help articles
 - ◆ Live chat with our Support team



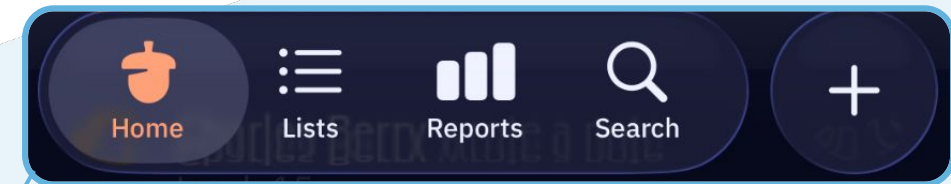
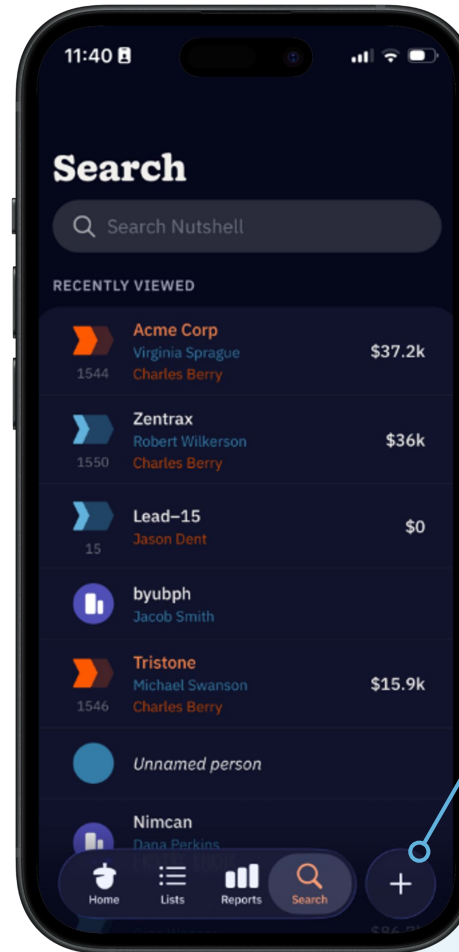
Notifications, Profile, & Help Center (cont.)

- Access Notifications from home screen
 - ◆ Control notification settings from desktop App and phone settings
- Profile settings
 - ◆ Update your photo
 - ◆ Light mode / dark mode
 - ◆ More to come as we add more features
- Nutshell support
 - ◆ Full access to help articles
 - ◆ Live chat with our Support team



Bottom Menu

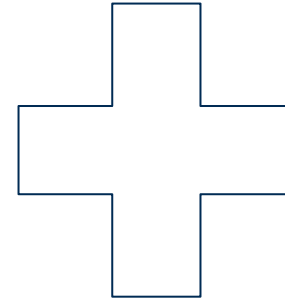
- Home
- Lists & Saved lists
 - ◆ People
 - ◆ Company
 - ◆ Leads
- Reports
 - ◆ Full access to reports
- Search
 - ◆ For any Person, Company or Lead



*Access to saved lists, reports, and leads follows the same rules you have set in the desktop app.

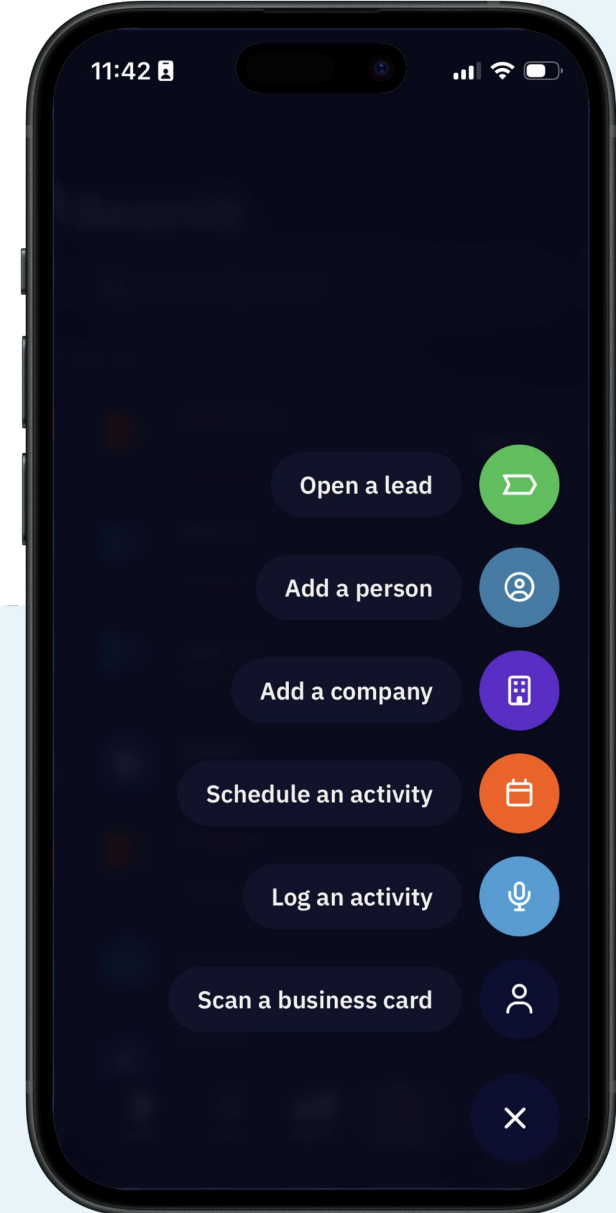


The last menu item is a big



How you can new information into Nutshell

- Open a new lead
- Add a new person record
- Add a new company record
- Schedule a new activity
- Log a past activity
- Scan a business card



Adding new information

Adding new Leads, People, Companies and activities



Adding a New lead

- Add New
- Scan a business card or enter manually
- Choose pipeline and assignee
- Add information
 - ◆ All required and optional fields match what you set up in your Nutshell configuration
- Can create a new Person or Company

11:43

New lead

Start from a business card
We'll queue up the person and their company, and name the lead.

Unnamed lead

PIPELINE

Pipeline
Auto distribute

Assignee
Charles Berry Reassign

PEOPLE

+ Add a person

COMPANIES

+ Add a company

PRODUCTS

+ Add a product

11:44

New lead

CUSTOM FIELDS

See all custom fields

LEAD DETAILS

Tags
None

Sources
None

Competitors
None

Est. close
None

Confidence
Pipeline default

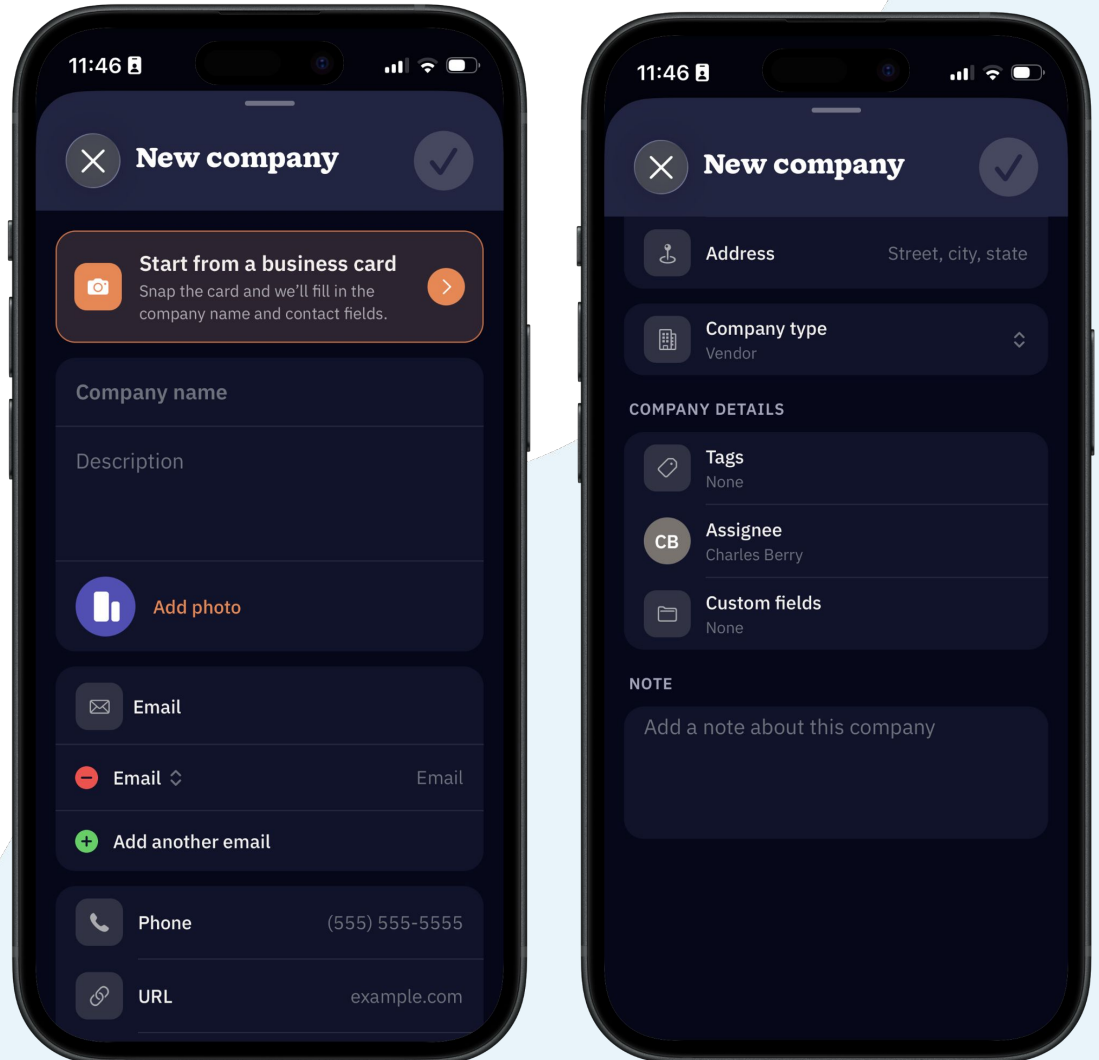
NOTE

Add a note about this lead



Adding a New Company

- Add New
- Similar process to adding a new Lead
- Enter all required and desired information
- All required and optional fields match what you set up in your Nutshell configuration
- Can create a new Person when creating a Company and vice versa



The image shows two smartphones side-by-side, both displaying the 'New company' form in a mobile application. The form is dark-themed with white text and icons. The left phone shows the top half of the form, including a 'Start from a business card' section, 'Company name', 'Description', 'Add photo', 'Email', and 'Phone' fields. The right phone shows the bottom half, including 'Address', 'Company type', 'COMPANY DETAILS' section with 'Tags', 'Assignee', and 'Custom fields', a 'NOTE' section, and a 'URL' field.

New company

Start from a business card
Snap the card and we'll fill in the company name and contact fields.

Company name

Description

Add photo

Email

Email (555) 555-5555

Add another email

Phone (555) 555-5555

URL example.com

Address Street, city, state

Company type Vendor

COMPANY DETAILS

Tags None

Assignee Charles Berry

Custom fields None

NOTE
Add a note about this company

Adding a New Person

11:50

New person

Start from a business card
Snap the card and we'll fill in the name, company and contact fields.

Name

Description

Add photo

Email name@company.com

Phone (555) 555-5555

URL example.com

Address Street, city, state

COMPANIES

COMPANIES

+ Add a company

PERSON DETAILS

Tags
None

Assignee
Charles Berry

Custom fields
None

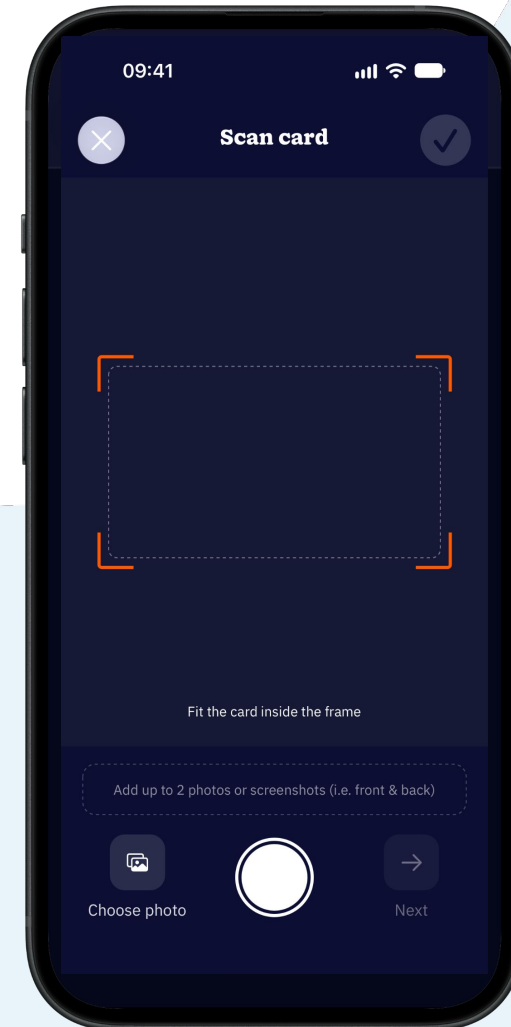
NOTE

Add a note about this person



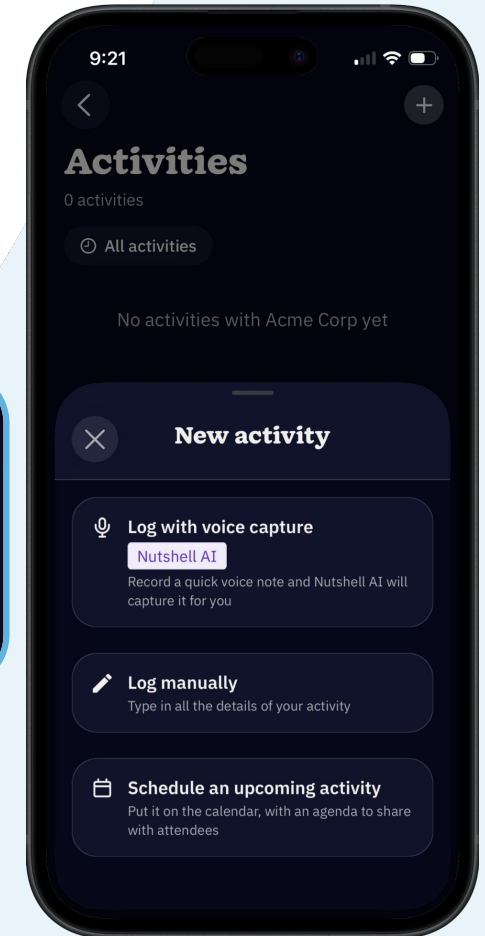
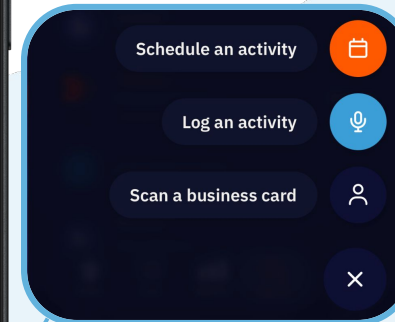
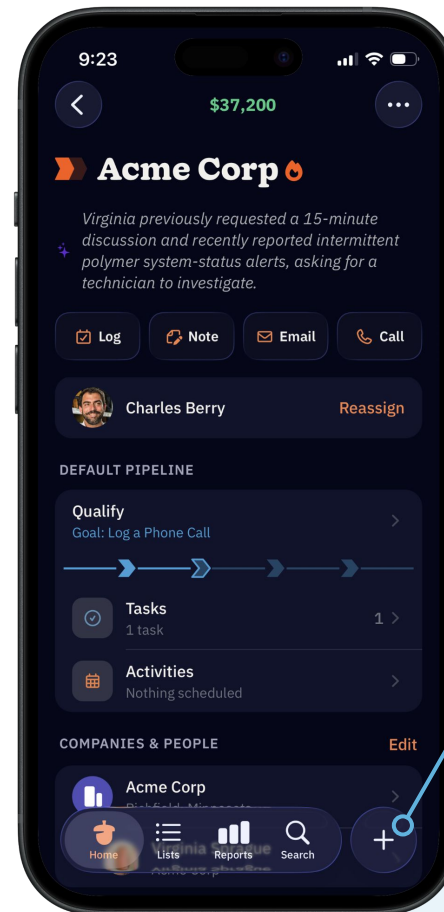
Or use the Business Card Scanner

- Add New
- Similar process to adding a new Lead
- Enter all required and desired information
- All required and optional fields match what you set up in your Nutshell configuration
- Can create a new Person when creating a Company and vice versa



Scheduling a New Activity

- Add New
- Choose:
 - ◆ Activity type
 - ◆ Date & time
 - ◆ Additional participants
 - ◆ Related lead
 - ◆ Location
- Add any notes or an agenda
- Green check mark to save the new activity
- Can also schedule a new activity from any Lead, Company, or Person record



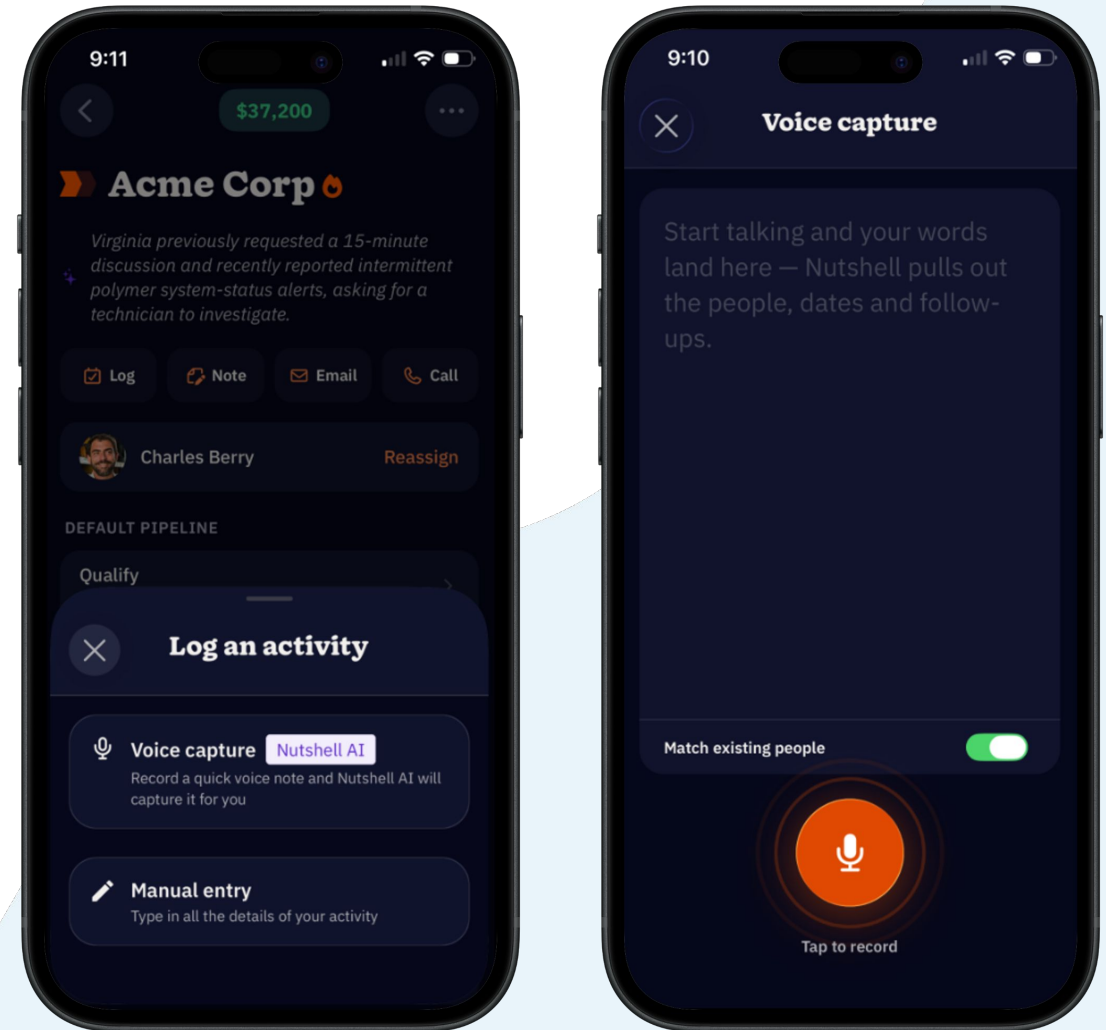
Logging new Activities

Add manually or Add with AI



Logging an activity

- 2 places & 2 options
- Where to start
 - ◆ Add new button
 - ◆ Any Lead, Company, or Person page
- How to log
 - ◆ **Manually entry:** nearly identical to scheduling an activity
 - ◆ **Nutshell AI:** record a quick voice note and Nutshell AI will capture the information and log an activity on the right record
- Quick and easy activity logging



Viewing current information

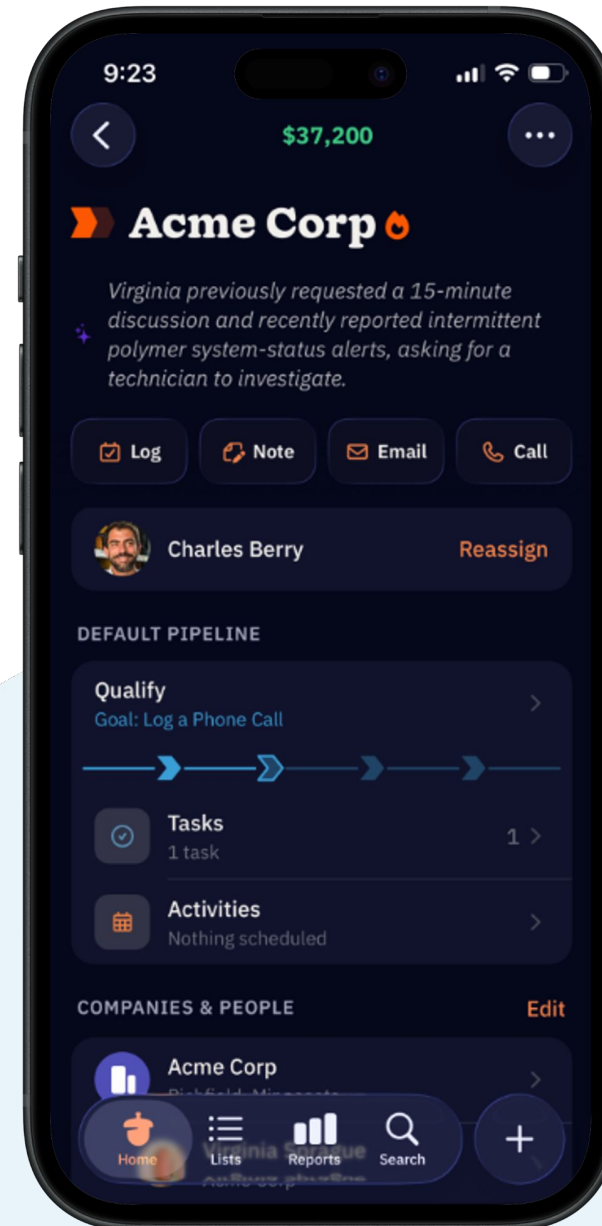
What can you see and do on current records



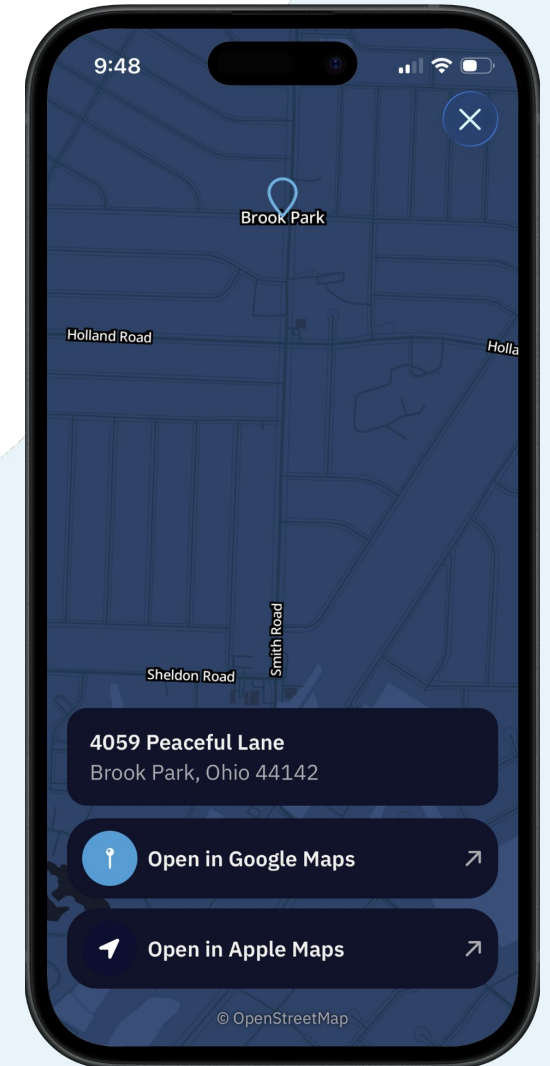
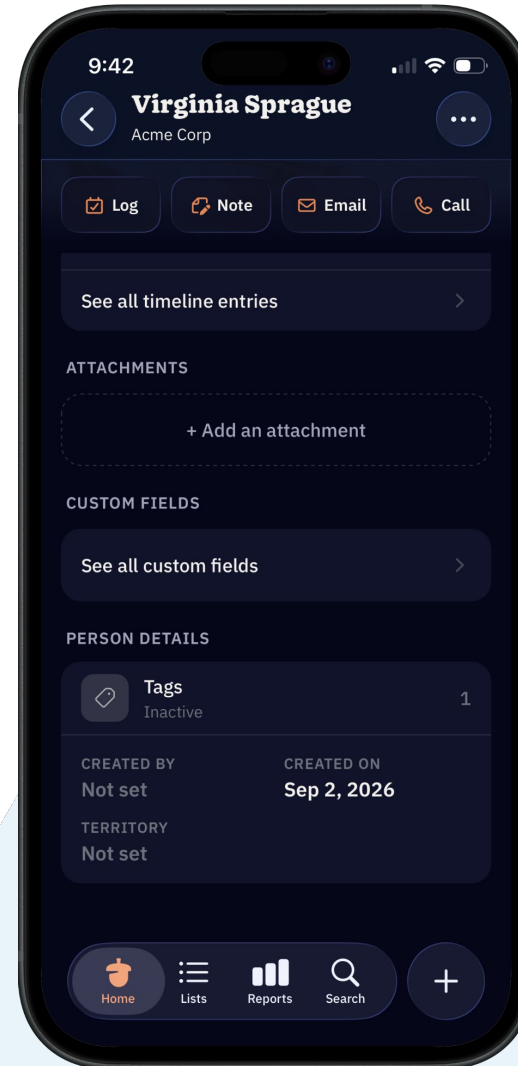
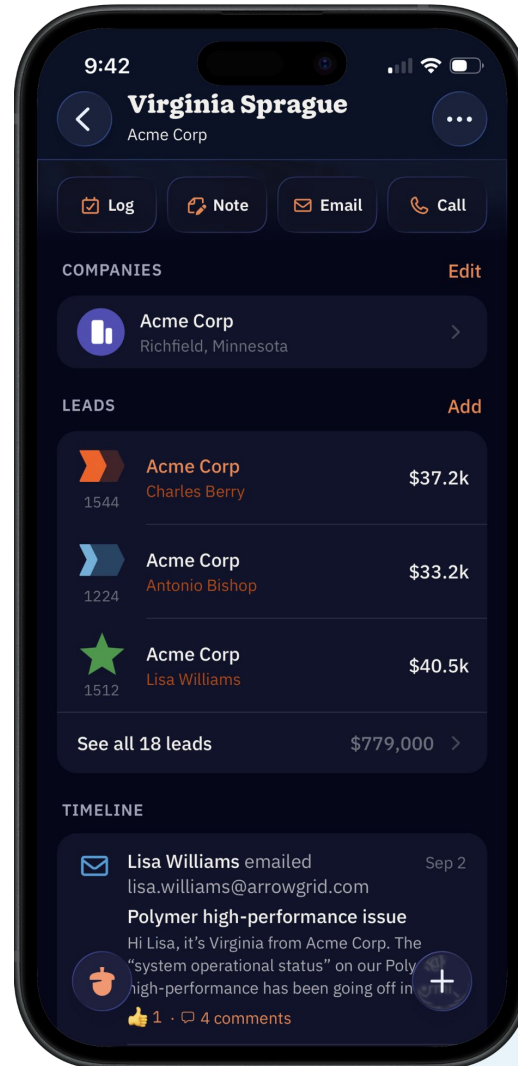
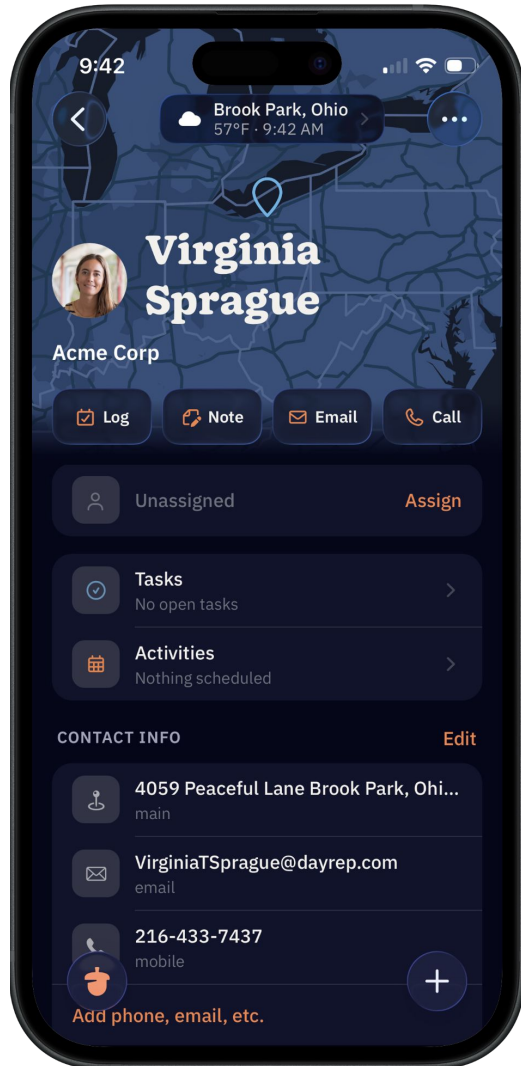
People, Company, Leads

- Open any record
- Scroll to see all info
 - ◆ Can see everything that you can see on desktop
- Info you see is based on settings you set in app
 - ◆ you can control order and what widgets show
- You can edit info, log activities, schedule new ones and make contact
- Location opens in Maps
 - ◆ For any Person, Company or Lead
- AI lead summaries*

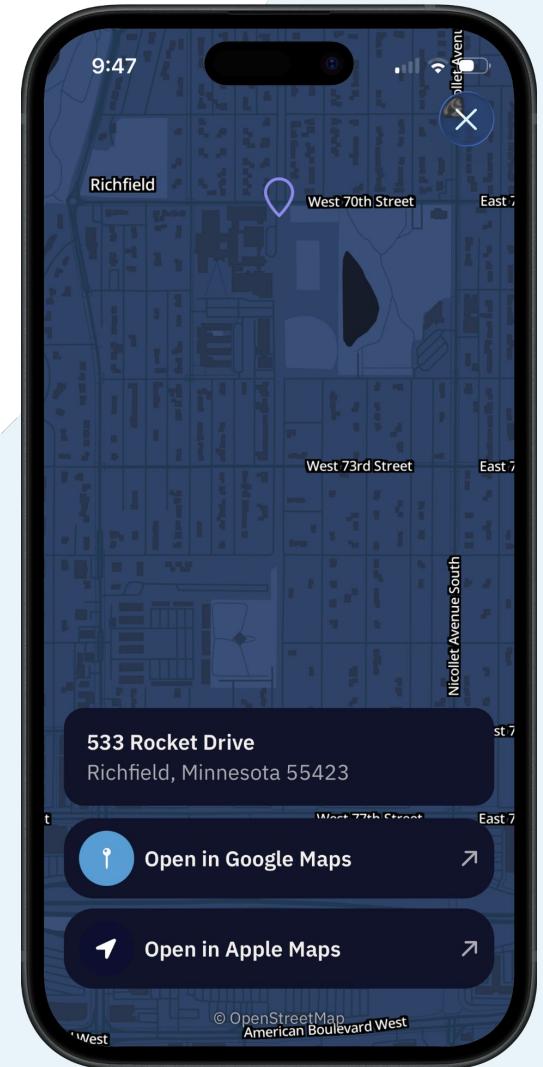
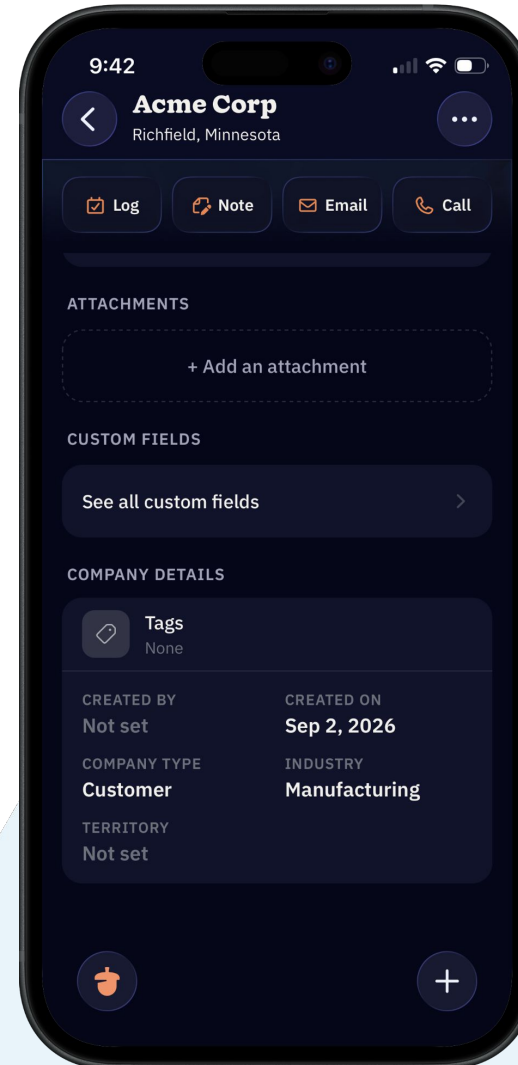
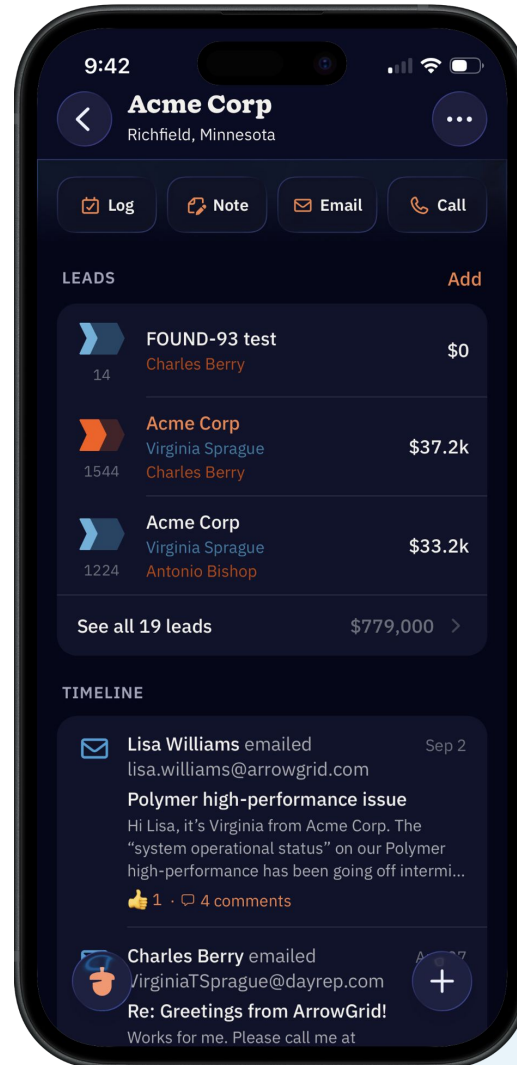
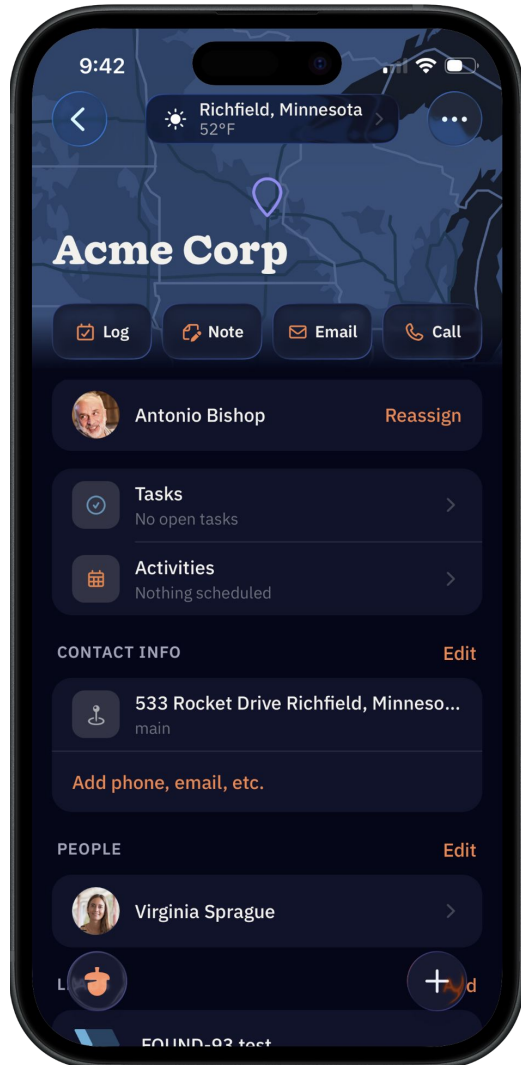
*AI summaries available on Sales Business and Enterprise



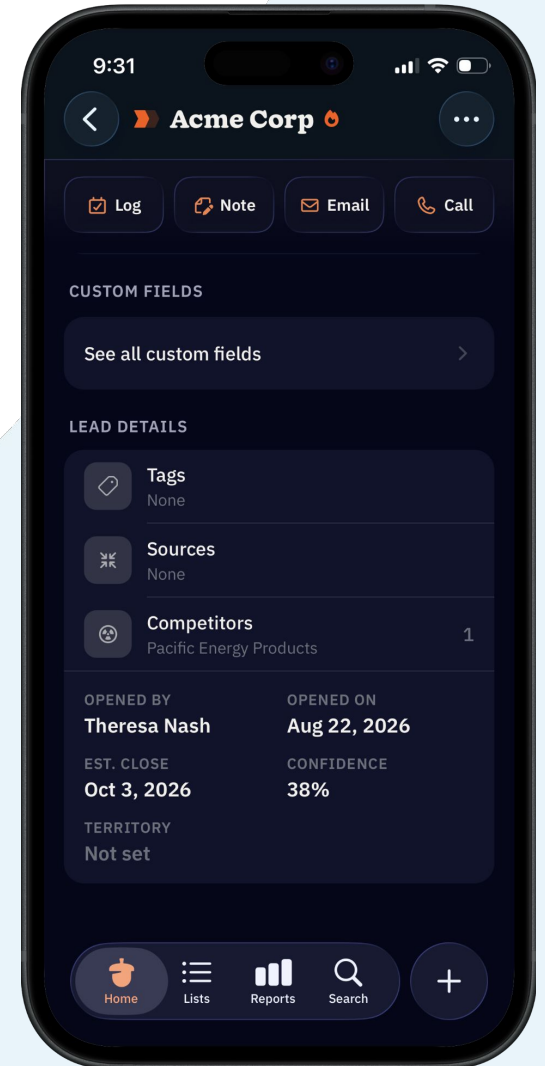
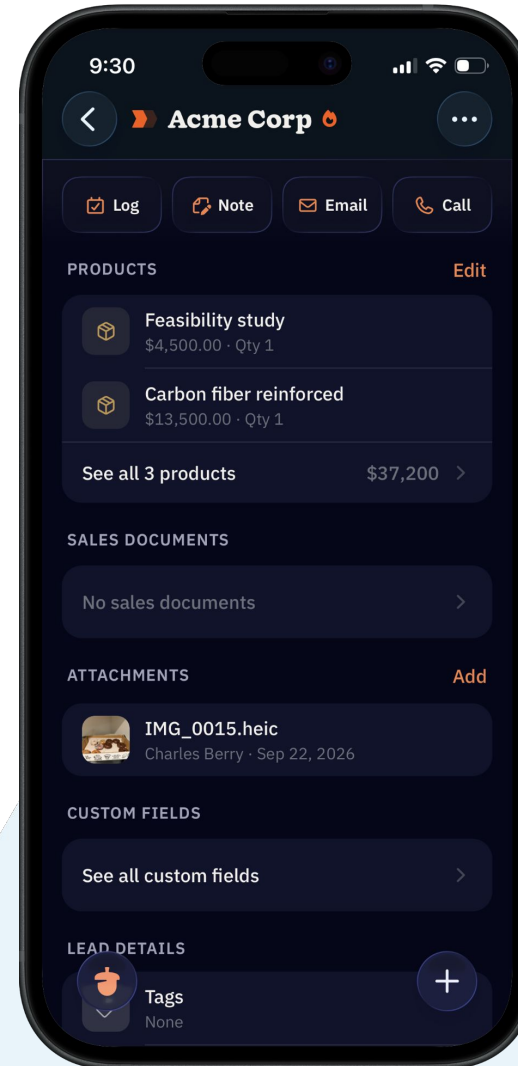
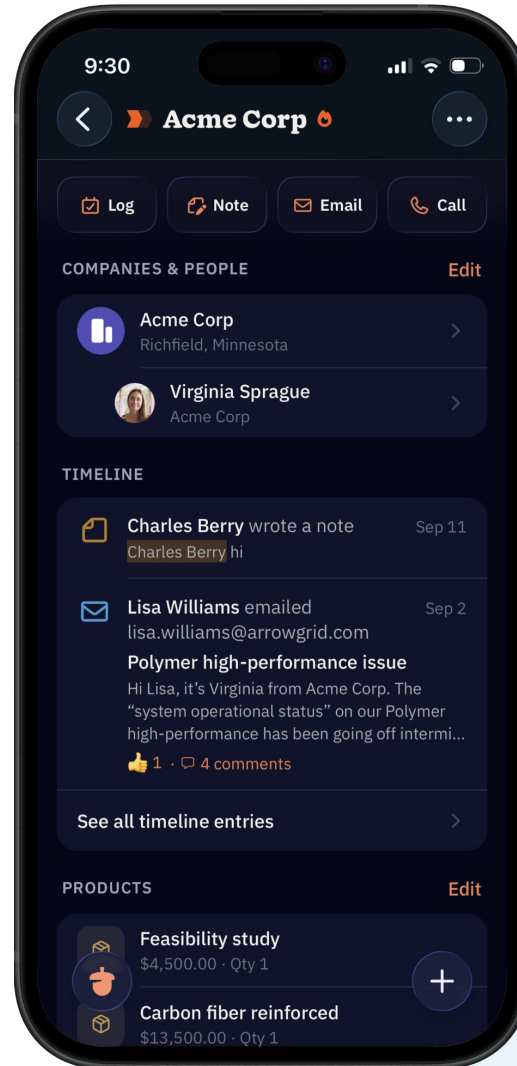
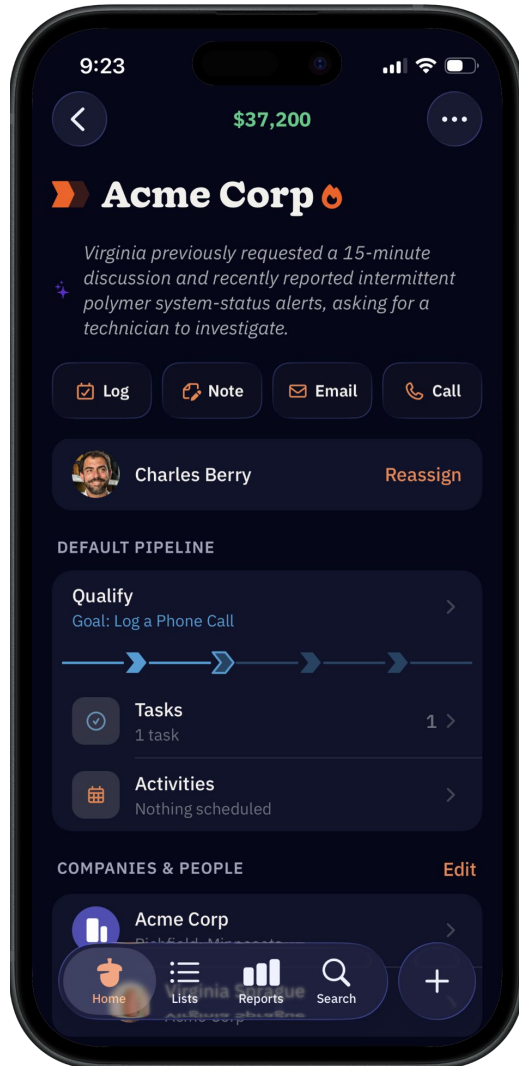
People page



Company page



Lead page

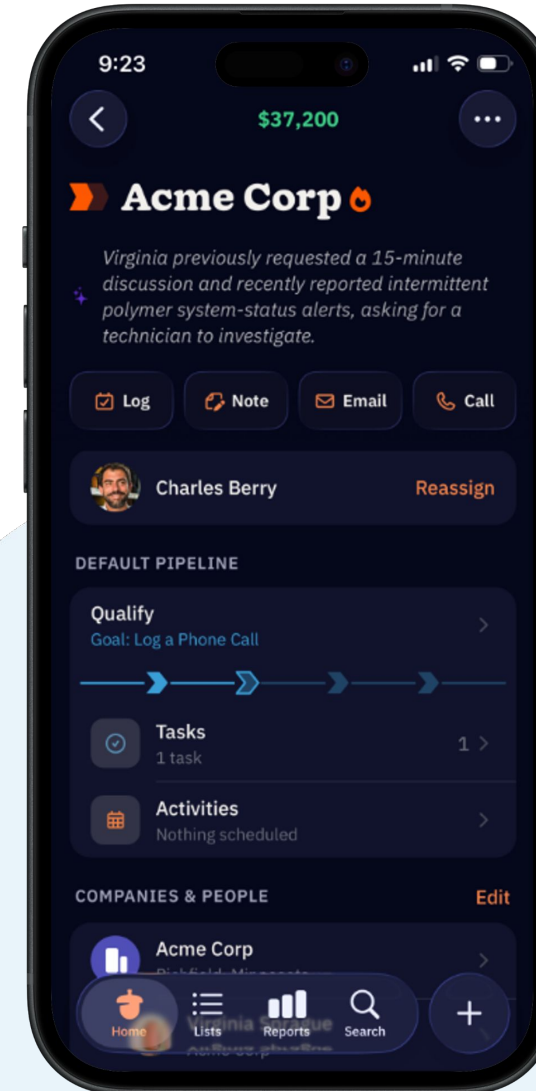


Keeping deals moving & records up to date

→ Update anything that you can on desktop:

- ◆ Log an activity
- ◆ Leave a note
- ◆ @ mention a colleague
- ◆ Send an email
- ◆ Calling
- ◆ Complete a task
- ◆ Update/Add products
- ◆ Update/add Tags and Custom fields
- ◆ Add attachments
- ◆ Reassign

→ Keep People and Company records up to date



Bonus: View Your Sales Documents

→ Able to view any Sales Doc

- ◆ Quote
- ◆ Proposal
- ◆ Invoice
- ◆ Contracts

→ Creating Templates & New Sales Docs

- ◆ **Only on desktop**

09:41

< Master Services Agreement ...

Ready

Master Services Agreement

This agreement covers materials, engineering, and related services provided by ArrowGrid. The customer and ArrowGrid each complete name, date, and signature below.

Customer (recipient)

Customer name _____

Customer date _____

Customer signature _____

ArrowGrid (sender)

ArrowGrid name Test _____

ArrowGrid date 09/15/2026 _____

ArrowGrid signature Charles Berry _____

SENDER FIELDS 3 of 3 completed

✓ ARROWGRID NAME Test

✓ ARROWGRID DATE Sep 15, 2026

ARROWGRID SIGNATURE Charles Berry

09:41

< Quote 1553-01 ...

Ready \$71,100

STATUS

Draft Ready Sent Accepted

Marked as ready Today, 11:54 AM

DOCUMENT

ArrowGrid 206 E. Huron Street Ann Arbor MI 48104 https://yourcompanywebsite.com 734-555-1212 QUOTE

PREPARED FOR: Betatechology Patricia Gannon 4310 Ralph Drive Independence Ohio 44131 (941) 628-7410

Quote number: 1553-01 Prepared by: Charles Berry Prepared on: September 17, 2026 Valid through: October 17, 2026

Name	SKU	Quantity	Price	Total
Carbon fiber reinforced	P-SP-01	3	\$13,500.00	\$40,500.00
Polymer high-performance	P-SP-02	1	\$11,400.00	\$11,400.00
Carbon fiber	T-SP-02	2	\$9,600.00	\$19,200.00
Subtotal				\$71,100.00
TOTAL				\$71,100.00

Thank you for considering ArrowGrid for your composite and panel needs. This quote covers standard stock materials with typical lead times of 10 business days. Quantities and SKUs below can be adjusted before sending. Expedited fulfillment is available on request.

Home Lists Reports Search Add

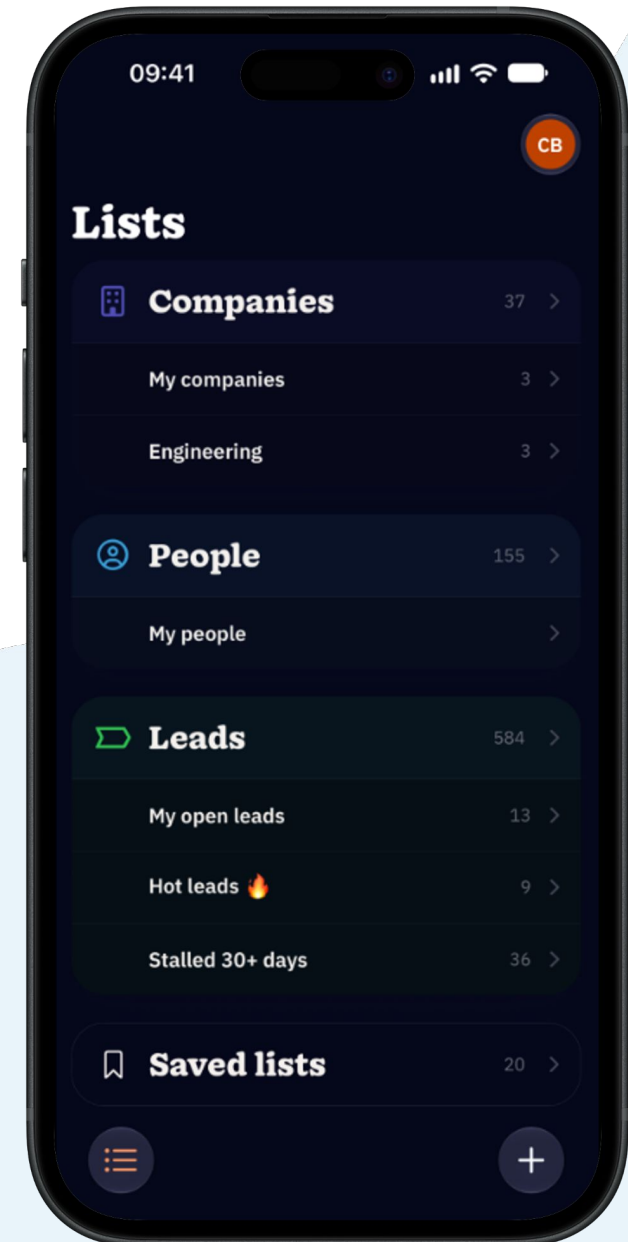
Customize your list views

Easy access to your most viewed lists



Customizing List view

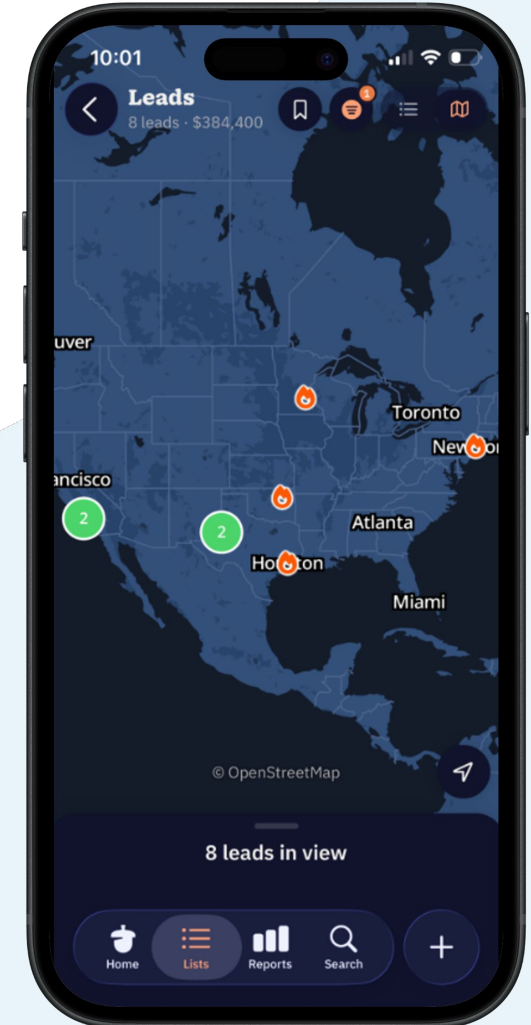
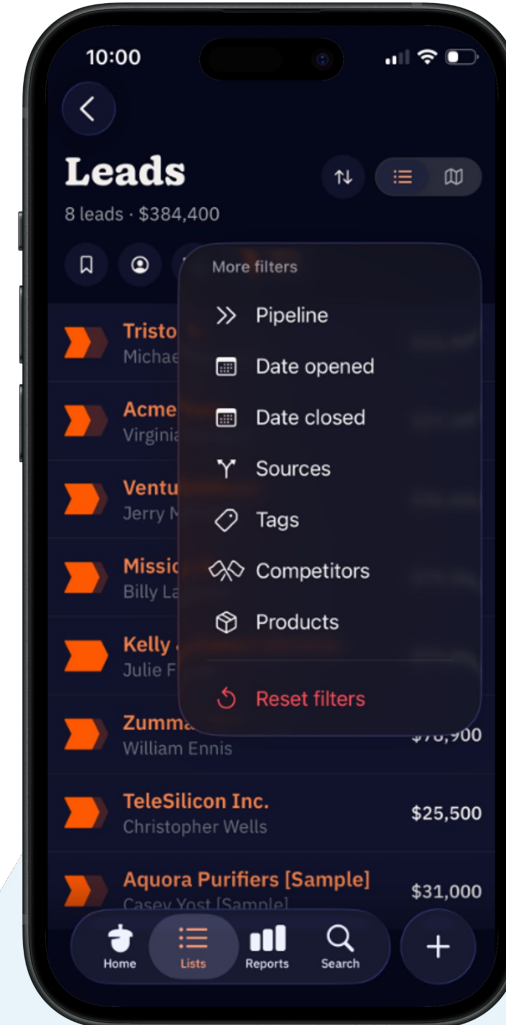
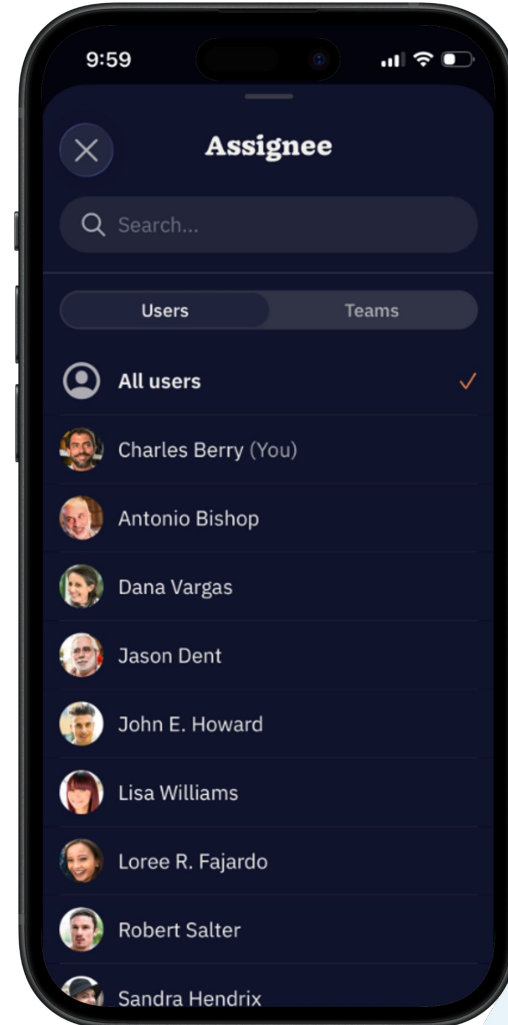
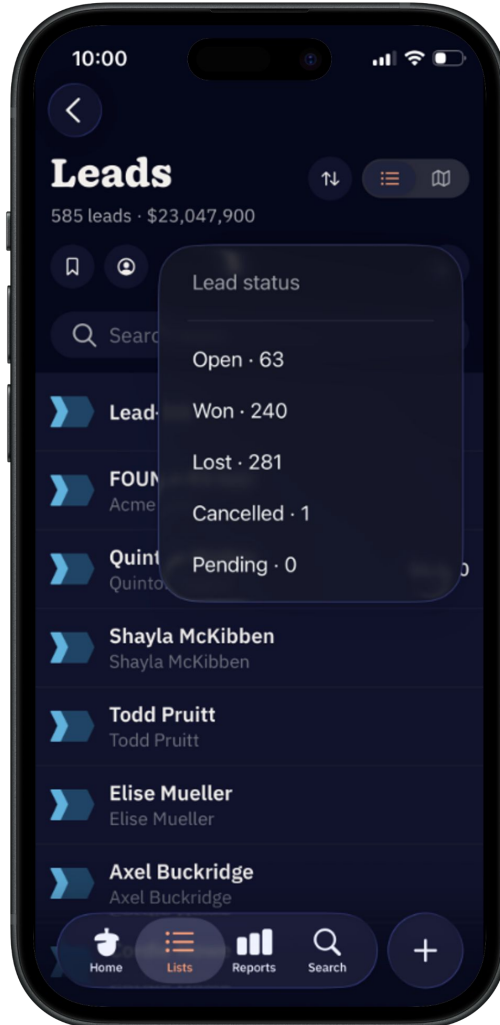
- Creating a Saved list *(on desktop)*
 - ◆ Take any People, Company, or Lead list
 - ◆ Apply filters (tags, custom fields, assignee, stage, etc.)
 - ◆ Save and decide who has access
- Access all Lists from the bottom menu
- Select which list type
- Click the bookmark icon to see all saved lists of that record type
- Find your favorite lists and click the bookmark icon to add them to your favorites



Customizing & Using Lists



Customizing & Using Lists



Reports

Access and share reports from your phone



Viewing & Sharing Reports

→ Reports available on Mobile:

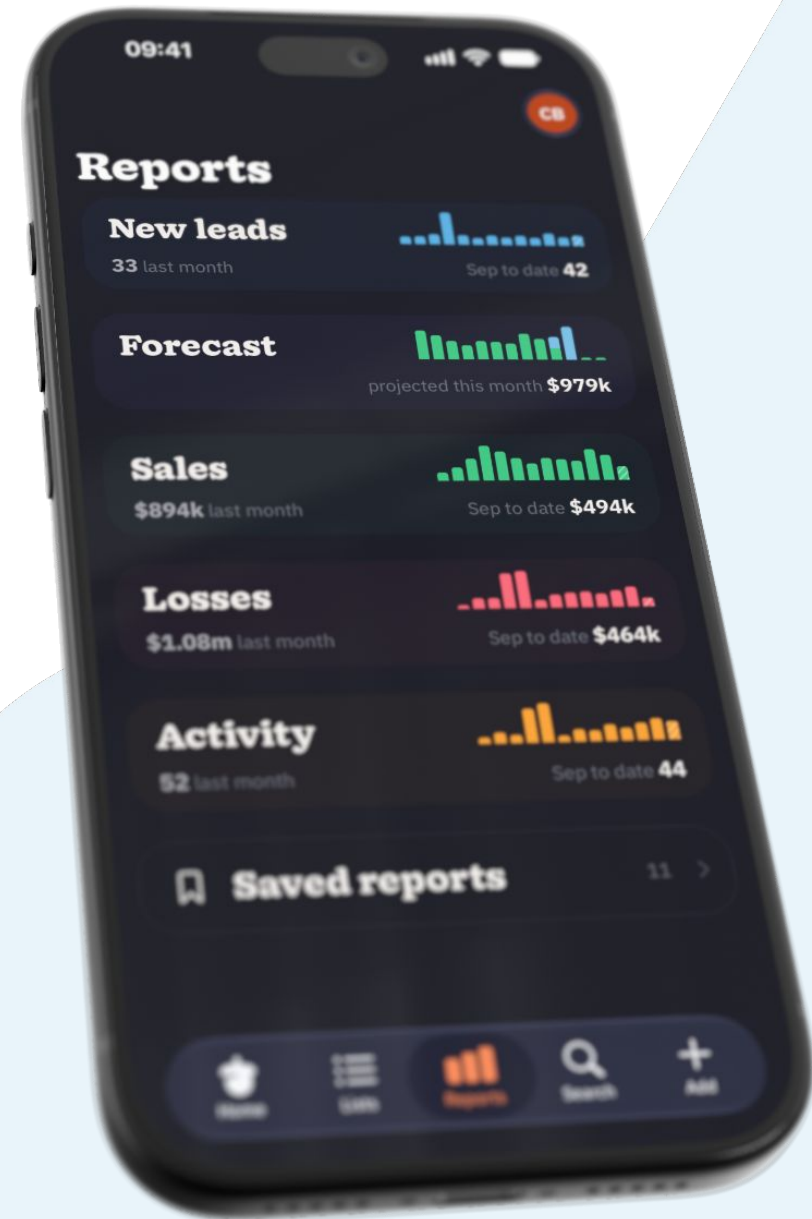
- ◆ New leads
- ◆ Forecast
- ◆ Sales
- ◆ Losses
- ◆ Activity

→ Can create filtered reports on the fly

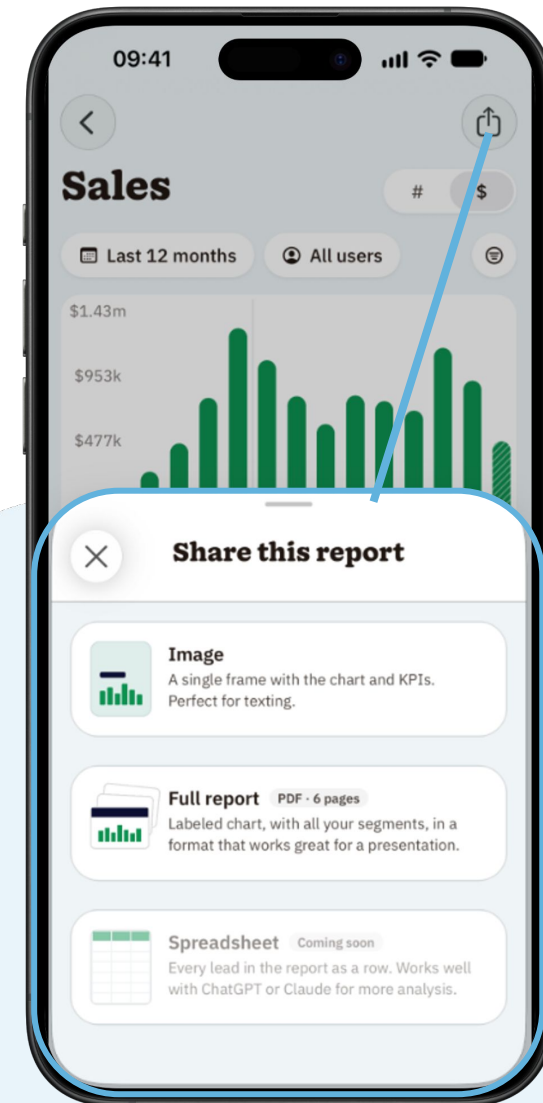
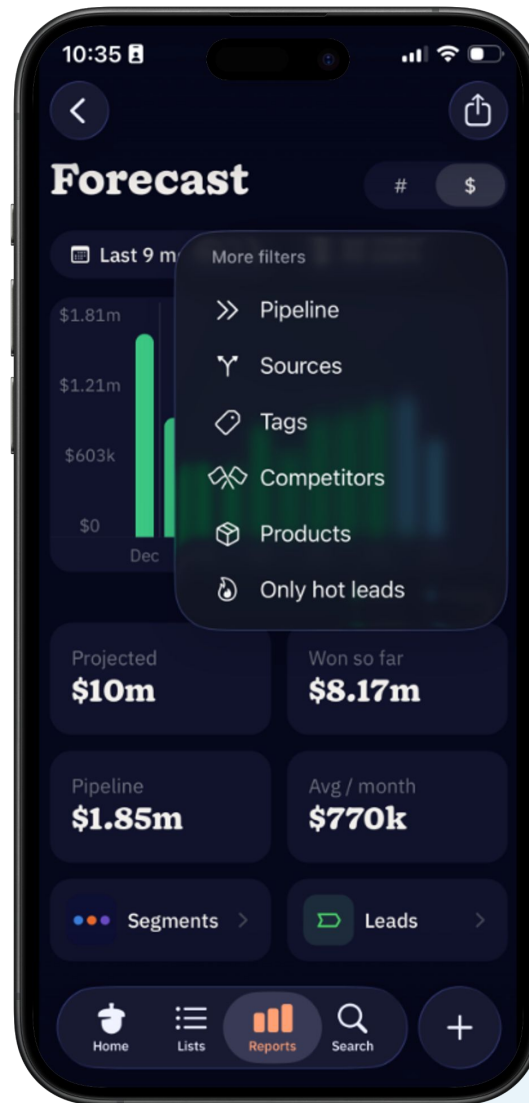
→ Access to you saved reports

→ Share a report

- ◆ Download an image or the full report as a PDF
- ◆ Spreadsheet (coming soon)



Viewing & Sharing Reports



Things you don't want to do on mobile

Set up & configuration



Better left to Desktop

→ Admin set up

- ◆ User and access control
- ◆ Pipeline creation and editing
- ◆ Custom fields & required fields
- ◆ Layout settings
- ◆ etc.

→ User settings

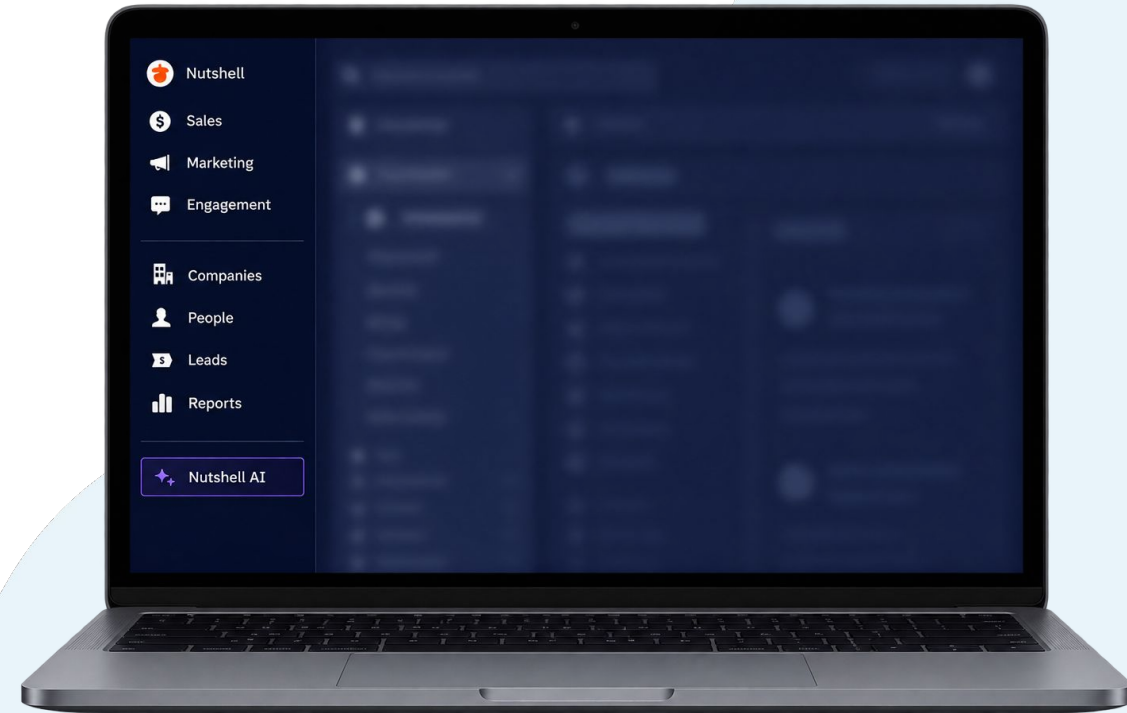
- ◆ Email sync
- ◆ Calendar sync
- ◆ Notification setting

→ Creating Reports & Saved Lists

- ◆ Once created and shared, can view easily on mobile

→ Marketing

- ◆ Emails, Audiences, Forms, Landing pages and Automations all better left for desktop



What's next for the Mobile App

We're far from done.



Summary of What's New

- New login flow
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- Reactions and @ mentions on timelines
- Timeline actions include:
 - ◆ Log - Note - Email - Call
- Admins can view User profiles
 - ◆ See tasks, activities, and pre-filtered reports
- Improved Map view
- Dark mode available



Up next & Under consideration

A few items we're tackling soon and a couple of things still on the radar.



Automatic call logging

Make it easier to capture and track calls, without the manual work.

IN PROGRESS

SMS

SMS

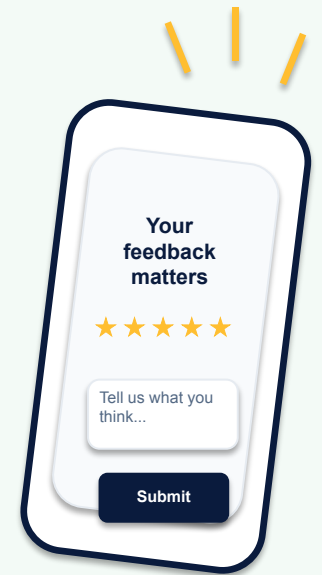
Bring text messaging into the mix for faster, more direct communication.

IN PROGRESS



Share your feedback!

- ✓ We tested extensively
- ✓ We also had Beta testers (thank you!)
- ✓ Even if the app is working just fine, it's important to hear how you think it should work.



Q&A

**Have any questions
about Nutshell's
Mobile App?**

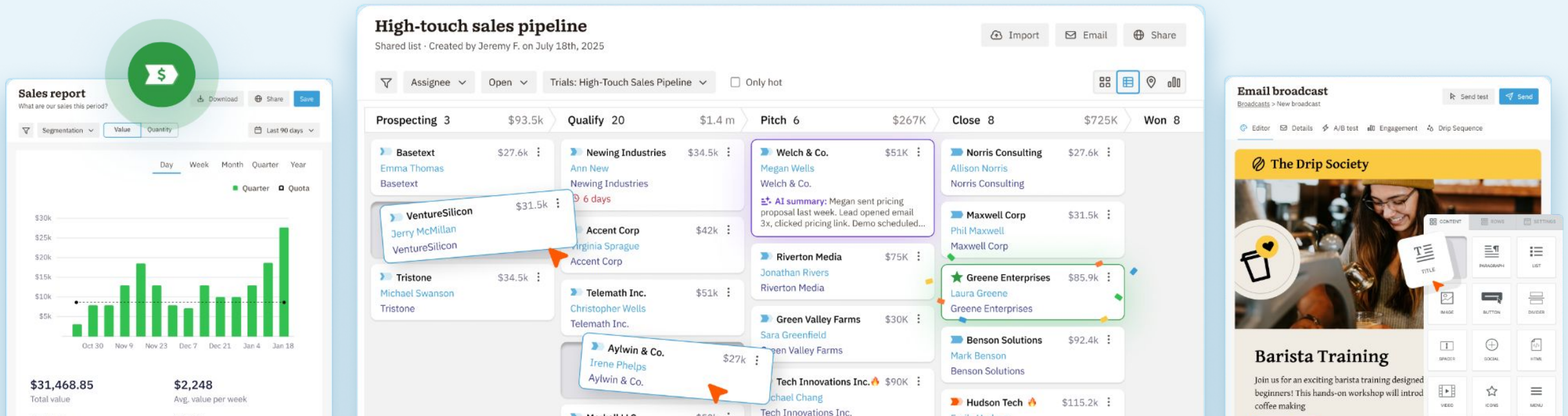


Resources

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.





Thanks for joining us today!

Discover more features, resources, and updates at:

nutshell.com

