

Nutshell 🍪

Nutshell Forms



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at Nutshell



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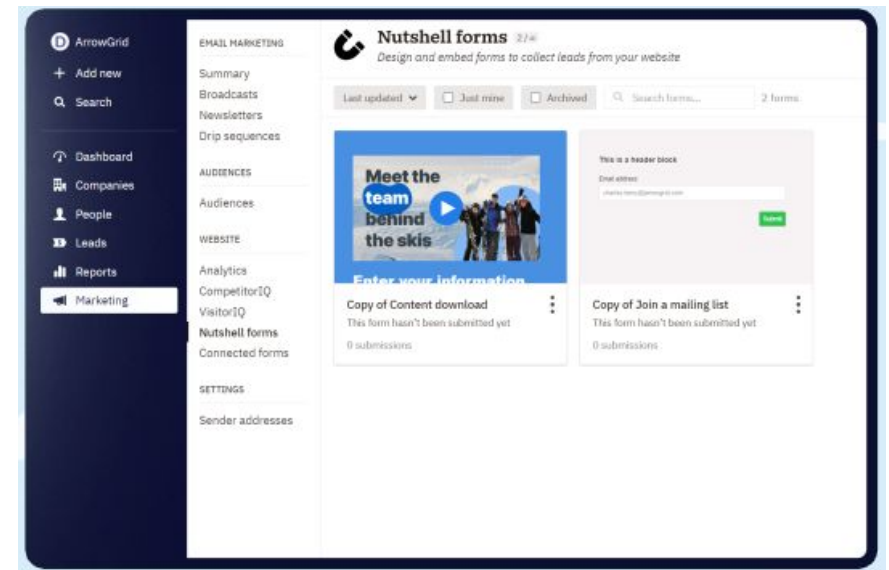
Today's Agenda

- What's a Nutshell Form? 3 minutes
- What's a Connected Form? 3 minutes
- What can you do with Nutshell Forms? 5 minutes
- Walkthrough of creating a Nutshell Form 5 minutes
- Who can use Nutshell Forms? 2 minutes
- The future of Nutshell Forms 2 minutes

Please ask your questions in the chat throughout the presentation

What is a Nutshell Form?

- Built-in forms right inside Nutshell that allow you to collect data and seamlessly sync it with your CRM.
- When logged into Nutshell
 - Go to Marketing > Nutshell forms > create form
- No limits to how many times your forms can be filled out
- Easily share by:
 - embedding on your website
 - as a link



Forms vs Connected Forms



- Free vs paid subscriptions
 - Online form builders can vary in price and features
- Both give you the option to sync data directly into Nutshell
- If you change a Connected form, you must also update your form mapping in Nutshell
- [Support article](#)



What Can You Do with Nutshell Forms?

- Create using your desired fields
- Design the way you want
- Thank you page or a success message
- Automatically create people, company and leads
- Auto apply tags or add to an audience
- Notify the appropriate people
- Duplicate detection to help you merge duplicate entries
- Easy to share/embed

Add a block

Search Nutshell fields...

H1 Header, H2 Subheader, Tt Text block, Image

Short text, Long text, Name, Company name

Email, Phone, Address, Note

File upload, Dropdown, Radio, Checkbox

See more Nutshell fields

Form design > Field design

Text color: #6d4420

Font size: 28 px

Font weight: Bold

Text position: Left, Center, Right

Cancel Add a next step Save

Add a next step that will automatically create a person, company, or lead in Nutshell when this form is submitted.

When this form is submitted...

Create a lead

High Velocity

NEXT STEPS

Create a person Add next steps

Create a company Add next steps

Add a next step

When this person is created...

Add a tag

Affiliate/Partner Interest

or

CAB Members

+ Add another tag

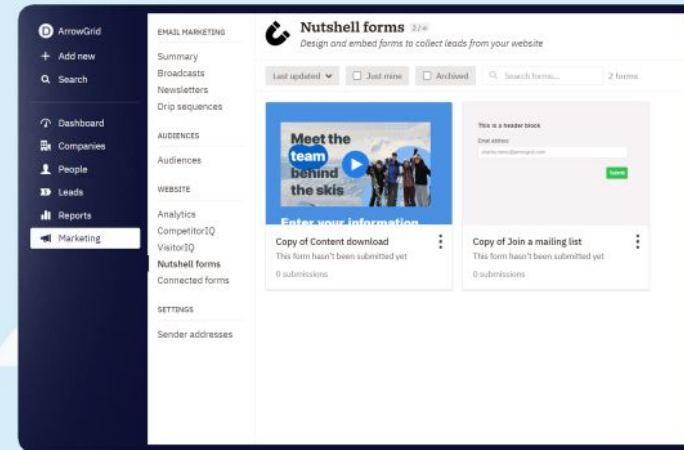
Add to an audience

Sell to Win

+ Add another audience

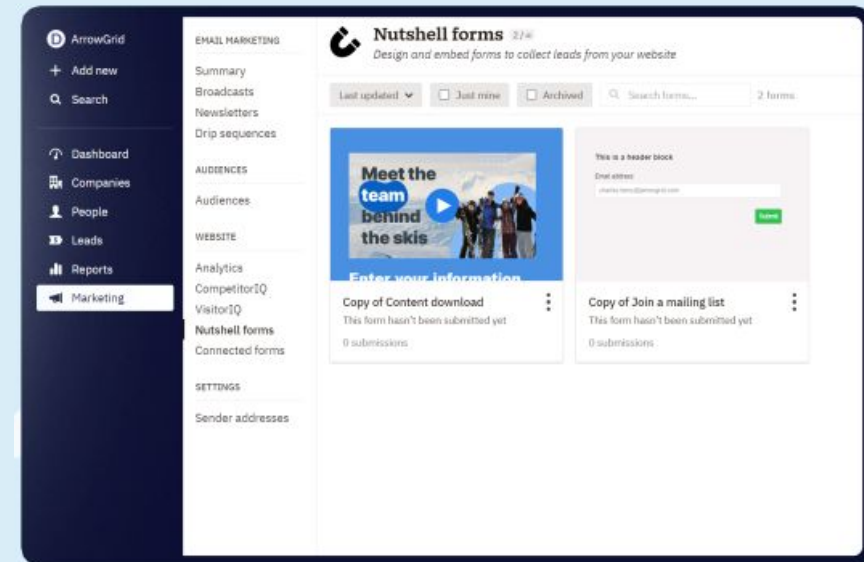
Let's Walk Through

Nutshell Forms



How to get/use Nutshell Forms

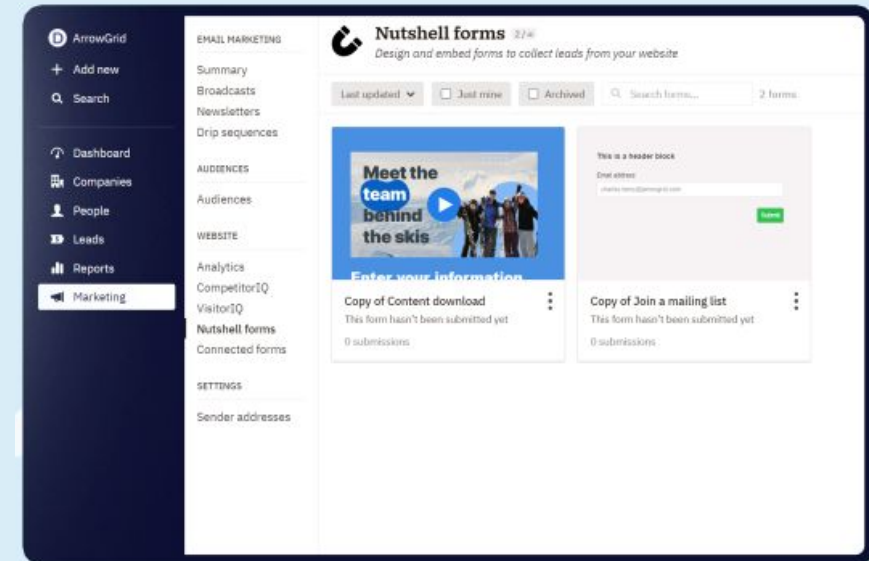
- All Nutshell tiers come with a set usage of Nutshell Forms
- When logged into Nutshell
 - Go to Marketing > Nutshell forms > create form
- No limits to how many times your forms can be filled out
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What's Next for Nutshell Forms

Later this year...

- Captcha
 - Spam prevention
- Form submissions updates
 - see all form submissions
 - easily export form submission data



Q&A

Thanks for joining us today!

Upcoming Webinars:

Email & Calendar Sync

Nutshell Analytics

Nutshell Campaigns Feat Email Marketing Specialist from WebFX