



Nutshell SMS

Text Messaging Built Into Your CRM

Nutshell SMS lets you leverage text messaging in your sales process to stay better connected with leads. Join us for this webinar to learn about the capabilities of Nutshell SMS, how it works, and how you can get started.



Andy Fowler
CEO & Co-founder of
Nutshell



Will Gordon
Director of Marketing
at Nutshell

Today's Agenda

- What is Nutshell SMS? 5 minutes
- How to send texts 5 minutes
- Accessing text threads 5 minutes
- Text thread assignment, notifications, opt out 5 minutes
- SMS automation 5 minutes
- How to get started 5 minutes
- Q&A

Please ask your questions in the chat throughout the presentation

What is Nutshell SMS?

- Sales text messaging built into your CRM!
 - Send and receive text messages to Nutshell contacts
 - View, assign, and reply to texts in Nutshell
 - Send automated text messages to leads to start reaching out



LO

Landon Oliver
906-298-0530

Landon Oliver

Open ▾

Started by Landon Oliver, August 19th at 10:10 AM

Assigned to Landon Oliver, August 19th at 10:10 AM

Hey Jeremy, thanks for joining our meeting, I'd love to connect more on our pricing and information!

LO

Of course! I can open up some time on my calendar if you have some days in mind?

Excellent, let us shoot for Monday at 3:00pm. If that time doesn't work for you, feel free to send some availability and we can find a time that suits us both!

How do I send texts?

- Directly from any Person, Company, or Lead timeline
 - **Send a text** button starts a new text thread



Send a text



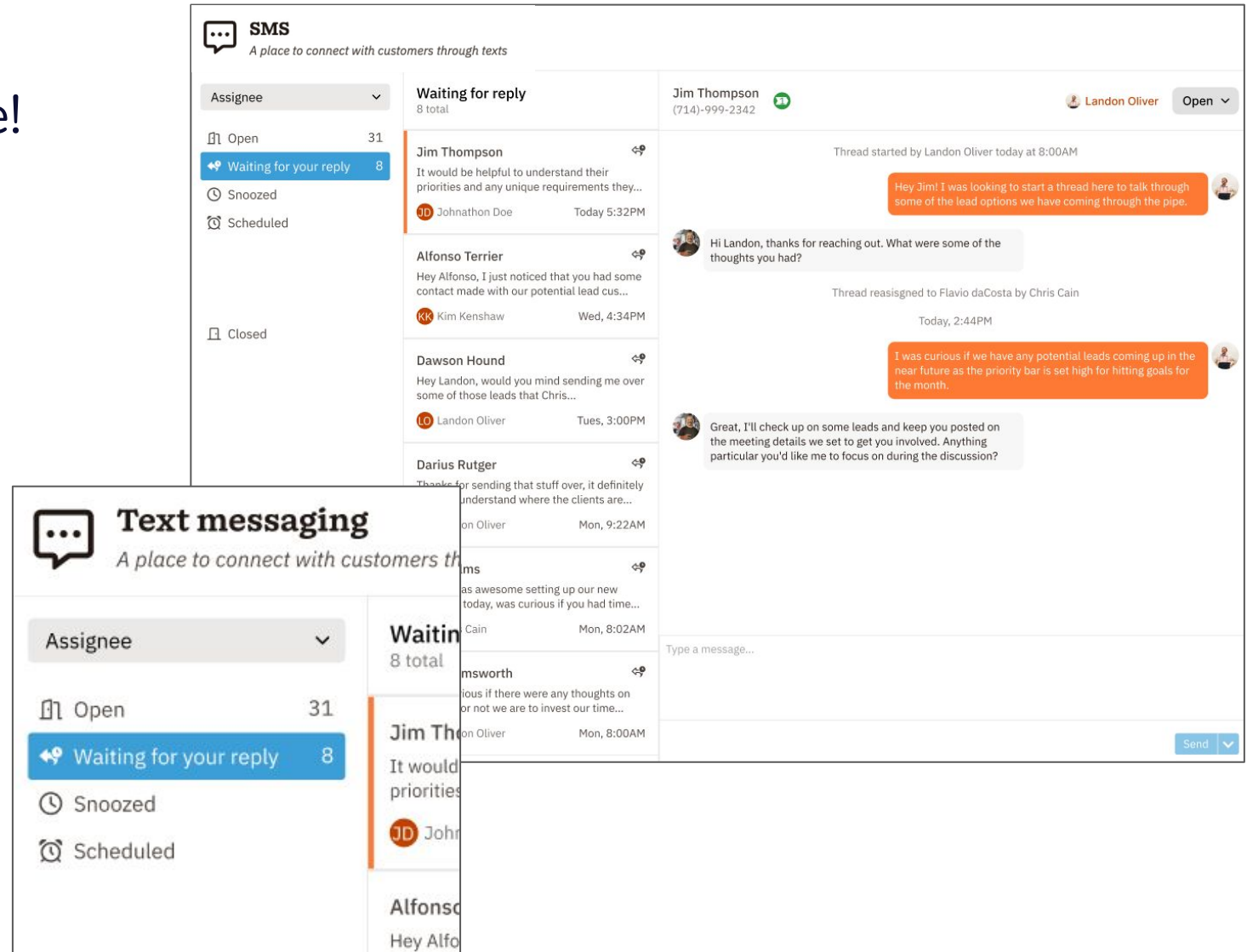
Send an email

- **Text threads:** Single conversation with a recipient to get something done
 - Setting up a virtual meeting
 - Following up on a sent proposal
 - Onboarding new customers
 - And more!

Amber Robinson It would be helpful to understand their priorities and any unique requirements they...	JD Johnathon Doe Today 8:00AM
Jim Tamlin Hey Kim, I just noticed that you had some contact made with our potential lead custo...	KK Kim Kenshaw Wed, 4:34PM
Oscar Lindalf Hey Landon, would you mind sending me over some of those leads that Chris...	LO Landon Oliver Tues, 3:00PM
Rodney Mullen Tonya, I am realizing now that the priorities that were set for our approach was a little...	AF Andy Fowler Mon, 11:42AM
Jeremy Landorf Hey Landon, would you be able to relay a message over to Chris for me, I am unable...	LO Landon Oliver Mon, 9:22AM
Albert Anderson Albert! It was awesome setting up our new proposal today, was curious if you had time...	CC Chris Cain Mon, 8:02AM

Accessing text threads

- All your threads in one place!
 - Filter by assignee
 - Reply from the SMS page
- Text thread states:
 - Open
 - Waiting for your reply
 - Snoozed
 - Scheduled
 - Closed
 - Failed to send



Text thread assignment

- Admins can assign threads to the right team member
 - You can also unassign
- Text thread visibility
 - Non-admins can only see the threads assigned to them in their inbox
 - Non-admins can see text threads on timelines - but they can't reply
 - Admins can reply to threads assigned to another user

Alanda Antonio
(904)-243-4324

 Landon Oliver

Snoozed ▾

Thread started by Alanda Antonio Fri, 4:44PM

AA

Hey Landon, I sent over some documents earlier today in regards to that lead we had and was curious if you received them?

Hey Alanda, I actually received them and was looking at them when you sent the message! I will write proper feedback and further plans of action when I am settled down with meetings!



AA

That is excellent, please let me know if you have any questions and I will do my best to answer them!

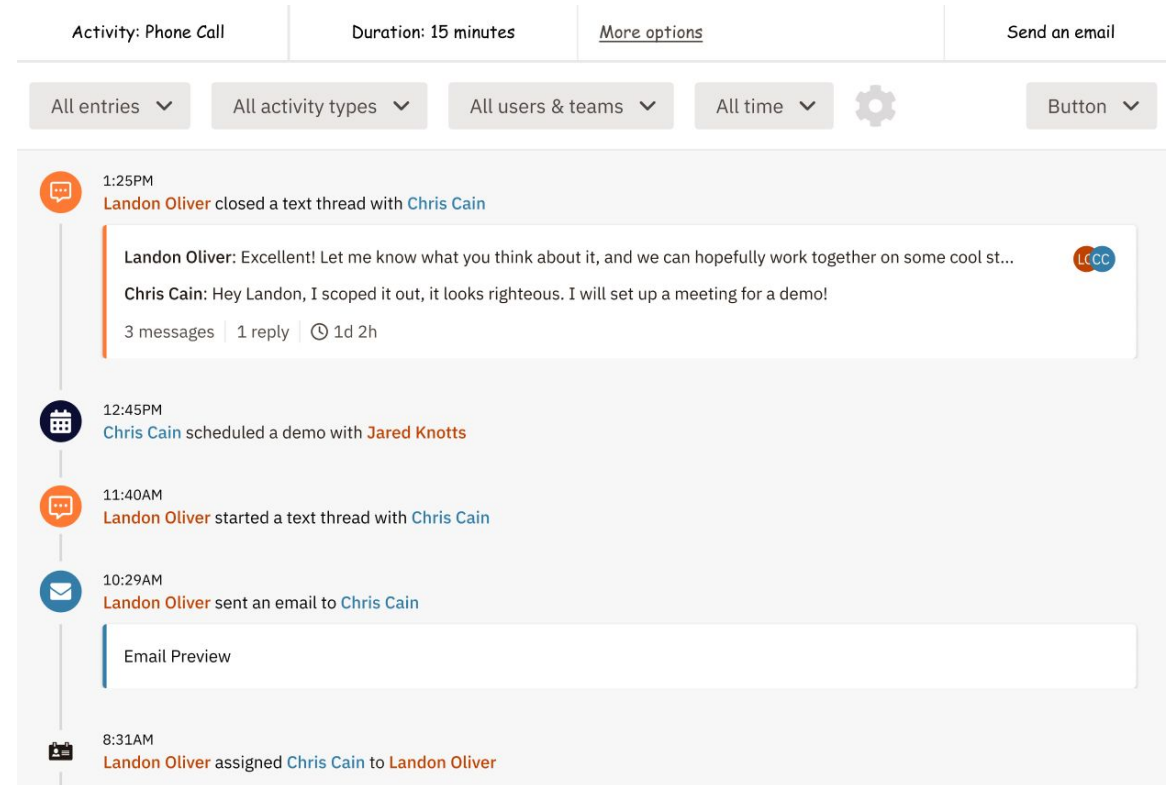
No worries! It might take me a little longer than expected since I have an upcoming meeting here shortly but I will connect with you when I can!



🕒 Snoozed until Mon, 9:30AM

Accessing text threads contd.

- Threads are pinned to recipient's timeline
 - Like email communication history!
- Previews latest or upcoming messages
- Click and open conversation from pinned thread



Text thread notifications

- Get notified when:
 - Recipients opt out
 - A text thread is assigned to you
 - You receive a response to a thread assigned to you

Notifications [Mark all as read](#)



You have a reply from **Chris Cain**
Hey John, would you mind sending...
Today at 12:44PM



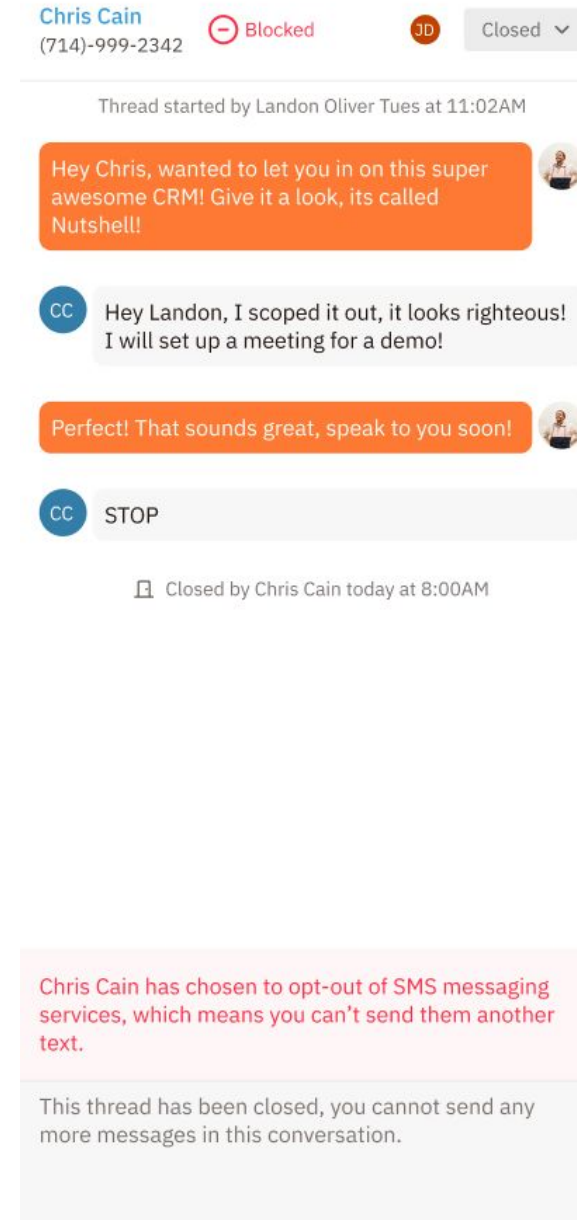
Landon Oliver assigned you to a
text thread with **Chris Cain**
Hey Chris, I am assigning this conver...
Today at 11:59AM



Christine Mayweather assigned you
to a text thread with **Jeff Dunn**
Hey Jeff, going over these items I just...
Yesterday at 3:34PM

Opting out

- We support “STOP” to opt out
- No longer be able to text opted out recipients
- Alert thread assignee
- Can't be reversed in the app or by our support team



SMS automation

- Schedule texts to send at the right time in your sales process
- New **Text automation** option in Pipelines

[Cancel](#) [New text message automation](#) [Add](#)

When a lead enters this stage, automatically send a text message

Send a text message ⓘ

Type a message to be sent to the lead...

0 / 255 characters

Start sending...

30

Minutes

▼

after the lead enters stage

Send text from...

Lead assignee

▼

SMS permissions

- Choose which of your teammates can use SMS, by assigning a license from their profile page

The screenshot displays the Nutshell user profile settings for Andy Fowler (afowler@nutshell.com). The interface includes a dark sidebar with navigation options like Dashboard, Companies, People, Leads, Reports, and Marketing. The main content area is divided into sections: ADMINISTRATION (General, Security, Billing, Users & teams, Audit log, Email security, Domains, Sender addresses), SALES AUTOMATION (Pipelines, Outcomes), DATA (Import, Export, Integrations, PeopleIQ, SQL access, Trash), ORGANIZATION (Activity types, Channels & sources, Company types, Competitors, Custom fields, Industries, Markets, Products, Tags, Territories), and QUOTAS. The 'Users & teams' section is active, showing user details and settings. The 'Licensing' section is highlighted, showing that SMS is enabled (toggle is 'On') and that 2 of 10 seats are currently used. Other settings visible include First name (Andy), Last name (Fowler), Email address (afowler@nutshell.com, andy@nutshell.com), Password (Change password), Role (Admin), Two-factor Authentication (Not yet enabled), Timezone ((UTC-05:00) Eastern Time (US & Canada)), Default market (U.S. (USD)), Default phone code (Use your company's default (+1)), Weather units (°F), and Twitter (@andyfowler, Connected).

Nutshell

+ Add new

Q Search

Dashboard

Companies

People

Leads

Reports

Marketing

Search settings...

Your settings

ADMINISTRATION

General

Security

Billing

Users & teams

Audit log

Email security

Domains

Sender addresses

SALES AUTOMATION

Pipelines

Outcomes

DATA

Import

Export

Integrations

PeopleIQ **New!**

SQL access

Trash

ORGANIZATION

Activity types

Channels & sources

Company types

Competitors

Custom fields

Industries

Markets

Products

Tags

Territories

QUOTAS

Andy Fowler
afowler@nutshell.com

First name: Andy

Last name: Fowler

Email address Username: afowler@nutshell.com, andy@nutshell.com
[Add another email address](#)

Password: [Change password](#)

Role: Admin
Admin users have access to all setup sections in Nutshell, including billing.
[Edit roles and permissions](#)

Two-factor Authentication: Not yet enabled

Licensing: SMS **On**
You are using 2 of 10 seats

Timezone: (UTC-05:00) Eastern Time (US & Canada)

Default market: U.S. (USD)

Default phone code: Use your company's default (+1)

Weather units: °F °C

Twitter: Connected to @andyfowler. [Disconnect](#)

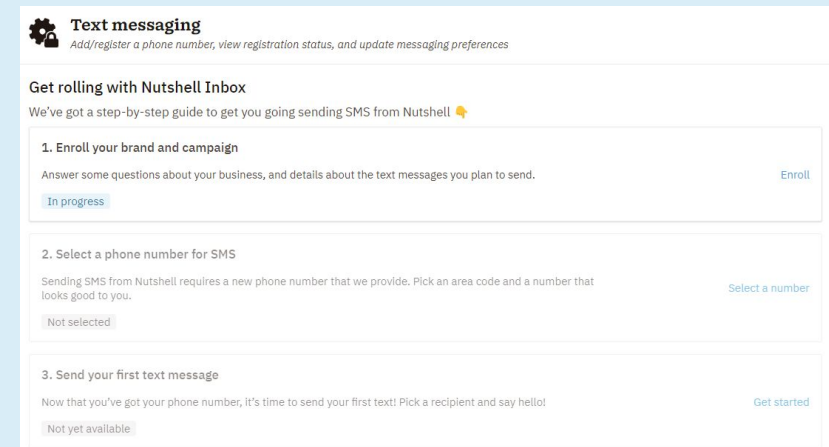
Let's Walk Through



How to set up Nutshell SMS

- Add-on feature
 - Company-wide credit pool
 - 1 outbound message = 1 credit
 - Starting at \$16 per seat with 150 monthly messages
 - You can purchase additional messages for your company
- One-time brand enrollment process
 - Fill out business and campaign information
 - Choose a company-wide phone number
 - Data infrastructure provider reviews/approves submission
 - Our team is ready to support you!

Example: If you purchase 10 SMS seats, you will have 1,500 monthly messages in your company-wide credit pull to be used between your 10 SMS users.



The screenshot shows the 'Text messaging' setup page in Nutshell. It includes a header with a gear icon and the title 'Text messaging', followed by a subtitle 'Add/register a phone number, view registration status, and update messaging preferences'. Below this is a section titled 'Get rolling with Nutshell Inbox' with a subtext 'We've got a step-by-step guide to get you going sending SMS from Nutshell'. The main content area contains three numbered steps: 1. 'Enroll your brand and campaign' with a description 'Answer some questions about your business, and details about the text messages you plan to send.' and an 'Enroll' button; 2. 'Select a phone number for SMS' with a description 'Sending SMS from Nutshell requires a new phone number that we provide. Pick an area code and a number that looks good to you.' and a 'Select a number' button; 3. 'Send your first text message' with a description 'Now that you've got your phone number, it's time to send your first text! Pick a recipient and say hello!' and a 'Get started' button. Each step has a status indicator: 'In progress' for step 1, 'Not selected' for step 2, and 'Not yet available' for step 3.

SMS Enrollment Tips

- Currently available in U.S. and Canada
- Ensure your EIN & legal company name are **exactly** right
- You will need a privacy policy on your website, including a statement of non-sharing of mobile numbers, frequency and “data rates apply”
- Unavailable for certain age-gated industries (alcohol, etc)

Campaign

Set up your campaign to send weekly marketing messages about sales and offers from your company to end customers who have opted in.

Description of your text plans *

Include who the sender is, who your recipients are, and why messages are being sent. For example: "We will send a welcome message and a discount offers from Acme Steamroller Company to customers who have opted in. Our team will interact with them via text to answer questions on business requirements."

Opt-in description *

Describe how recipients opt in to receiving messages. If multiple opt-in methods are used, include all of them. If you are collecting phone numbers for opt-in from your website, you must include a link to your privacy policy & terms of service. Your privacy policy must include a statement of non-sharing for mobile numbers, message frequency, and a "message and data rates apply" disclosure.

For example "End users opt-in by visiting www.example.com and adding their phone number. They then check a box agreeing to receive text messages from Acme, Inc. Additionally, end users can also opt-in by texting START to (111) 555-3333 to opt in. Terms and Conditions at www.example.com/tc. Privacy Policy at www.example.com/privacy"

Sample message #1 *

Example: "Hi! This is Andy from Nutshell. I wanted to see if I could answer any questions about your inquiry for a new warehouse roof. If you'd like to opt out of any other messages, just text STOP in reply to this message."

Sample message #2 *

Q&A

Join our monthly support-led podcast

Join us on the 4th Wednesday of every month at Noon eastern for our recurring webcast where we go over how to set up, use, and get more out of the Nutshell essentials.

It's also a great opportunity to be able to ask a question and be **shown** an answer.

You can register at: <https://www.nutshell.com/guided-tours/nutshell-best-practices>

Our next Nutshell Best Practices webcast will be on November 27, 2024 at 12:00 PM EST.

Thanks for joining us today!

Recent releases:

- **Multiple attendees for Scheduler:** meeting attendees can now invite more people to their bookings
- **Custom fields descriptions:** help your team remember the purpose of custom fields
- **Log an activity in Nutshell with Zapier:** when something happens in another app, Nutshell will create/log an activity
- **Custom domains:** use your custom domain to host Forms, Scheduler links, and marketing email editions
- **REST API documentation:** integrating your tech stack with Nutshell is easier than ever
- **Marketing email templates:** ensure consistent branding across your company emails

Upcoming releases:

- **Marketing dashboard:** track how your Nutshell marketing efforts are performing, all in one place
- **Nutshell Webchat:** enable conversations directly from your company website

Keep up to date with all of our Product Updates ([here](#)) or subscribe to our [Shipping News newsletter](#). **Nutshell** 