



Use Nutshell to Chat with Customers Where They're At

Learn how you can Chat with your customers on FB Messenger, Instagram DMs, and WhatsApp all inside Nutshell's Inbox

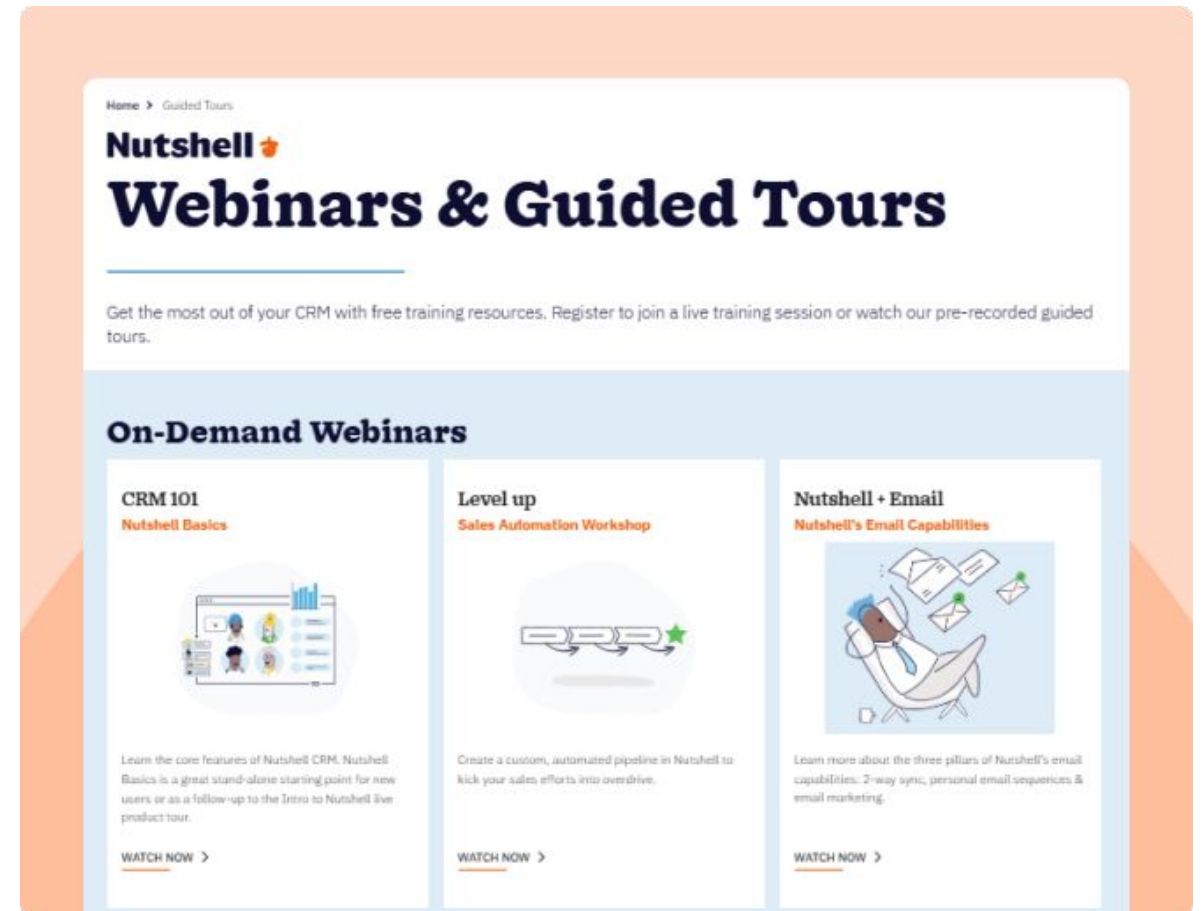
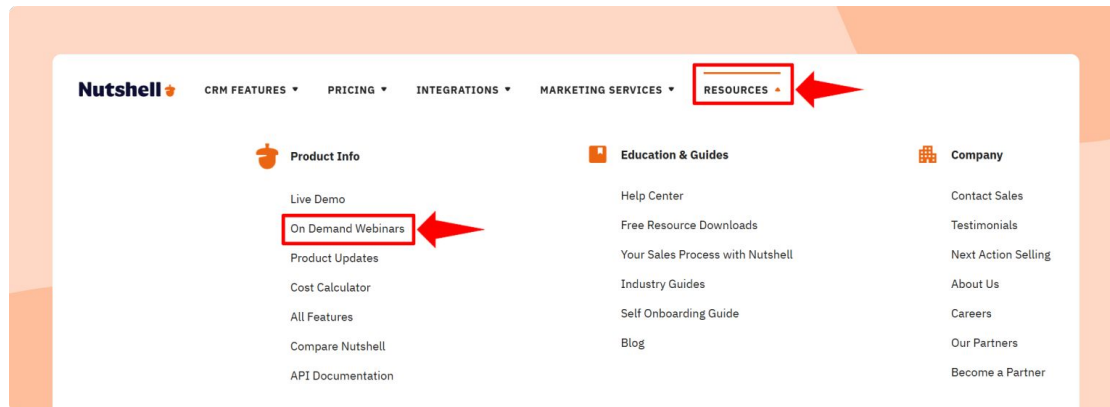


Will Gordon
Sr Director of
Marketing
at Nutshell

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

- General overview of Nutshell's Engagement Suite 10 minutes
- High-level overview of the setup process for key integrations 15 minutes
- Walkthrough of conversations in action inside Nutshell 10 minutes
- Q&A

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

Why is it important to adapt to how your customers want to chat with you?

*Could you imagine running a successful (and growing) business in 2025 while only having a **landline** and a **fax number**?*

Your customers are adapting to new technologies and are expecting you to do the same.

The Importance of Meeting Customers *Where* They Are

- Customer communication has evolved, with **multiple channels** to choose from.
- Now, businesses must engage with their audience through their **preferred channels**.
- That means interacting with customers and leads across a host of **different platforms**.



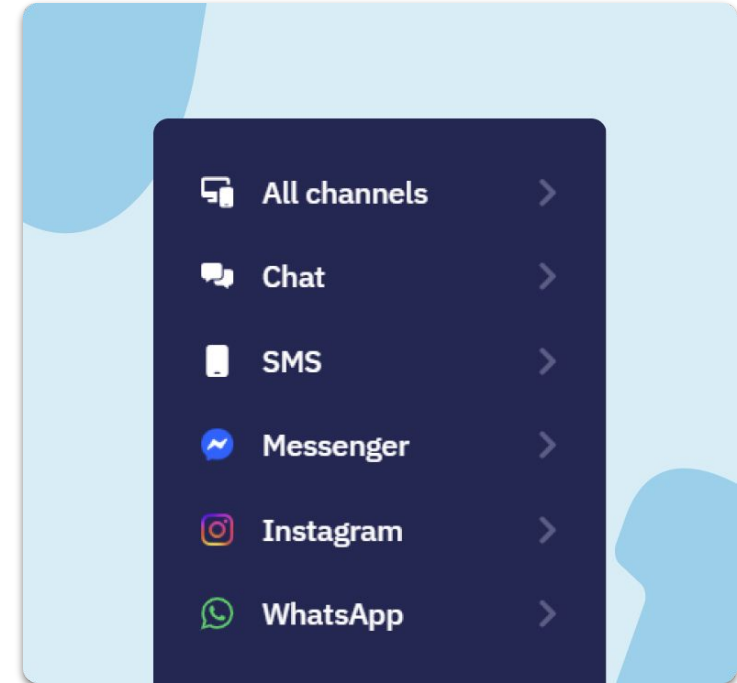
How Nutshell Helps:

- Nutshell's Engagement Suite helps you **centralize critical conversations**.
- **Customers** message in from Facebook, Instagram, WhatsApp, Web Chat or SMS...
- And **You** message back from Nutshell Inbox!

No need to switch apps.

No need to enter data.

(Nutshell does it for you)

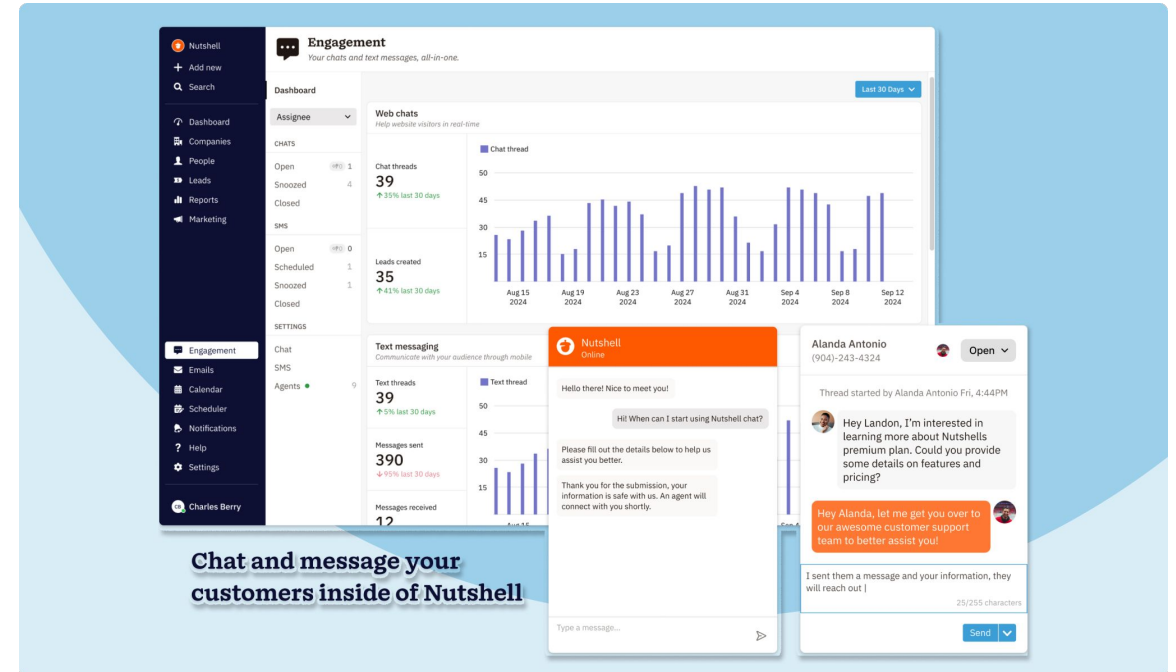


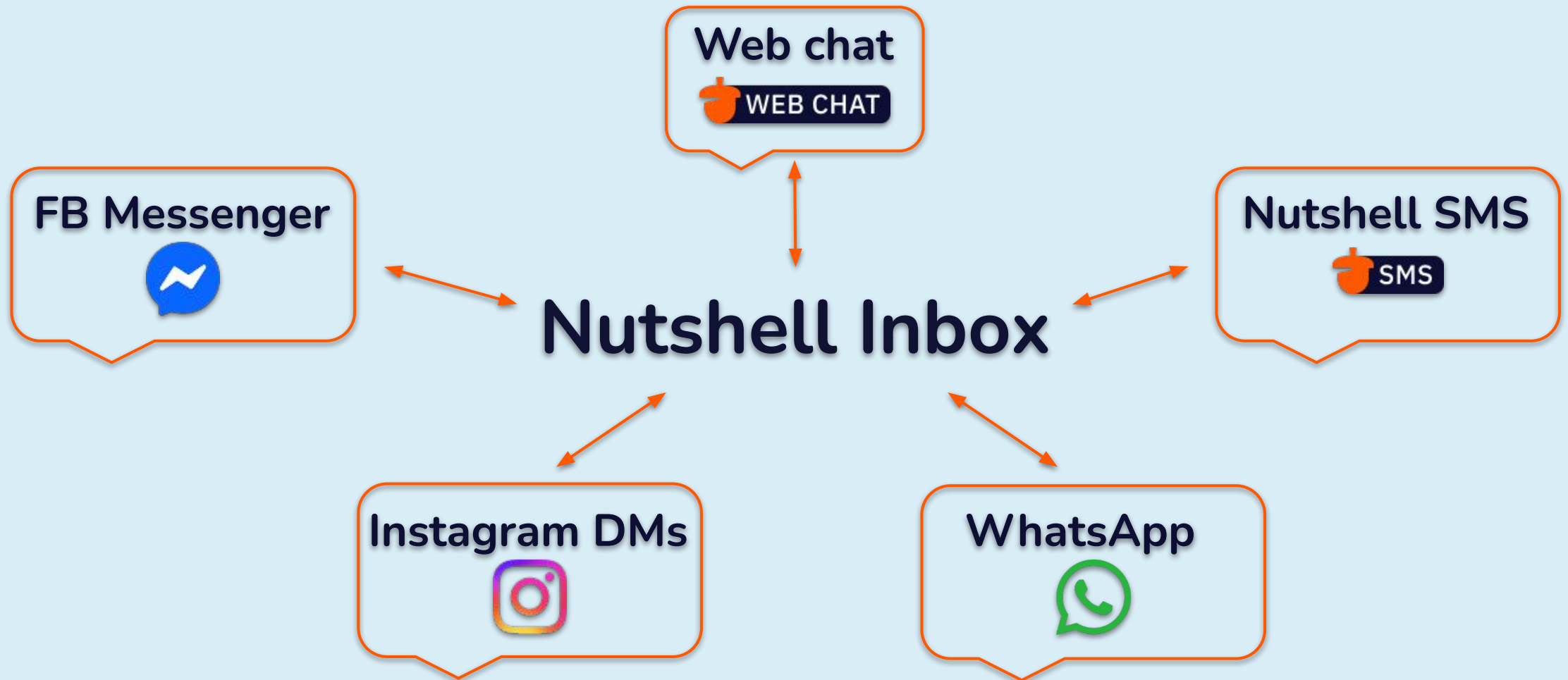
Nutshell's Engagement Suite



What is Nutshell's Engagement Suite?

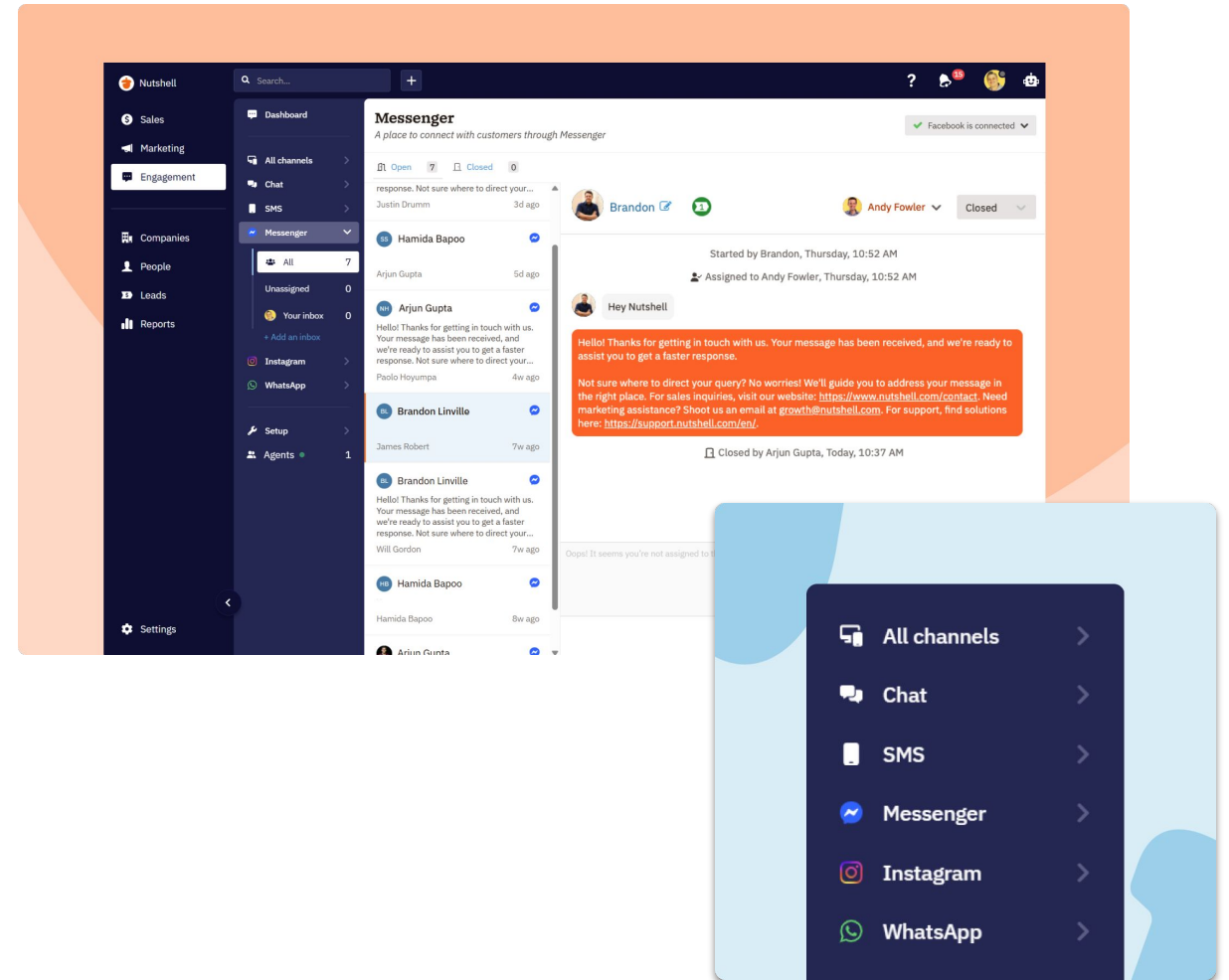
- Our Engagement Suite is a unified platform within Nutshell's CRM that makes **managing inbound and outbound lead and customer communications** easy.
- Key components:
 - **Web chat**
 - **Nutshell 1:1 SMS**
 - **Third-party messaging app integrations:**
 - FB Messenger, Instagram DMs, & WhatsApp
- Bring all your customer data into one centralized hub to:
 - **Streamline** communication workflows
 - **Enhance** customer interaction experiences
 - **Improve** team collaboration and customer conversation sharing





Nutshell Inbox & Beyond: Your Unified Communication Hub

- Nutshell Inbox is your go-to **messaging control center inside Nutshell** for all lead and customer messaging
- **Send, receive, assign, & manage message conversations in one place** (Web Chat, FB Messenger, Instagram DMs, & WhatsApp)
- Manage 1:1 SMS messages from a **dedicated SMS page inside Nutshell** for centralized engagement tracking
- Integrate email communication within your Nutshell timelines for a **360-degree view of contact interactions**



Getting Started With Key Engagement Integrations

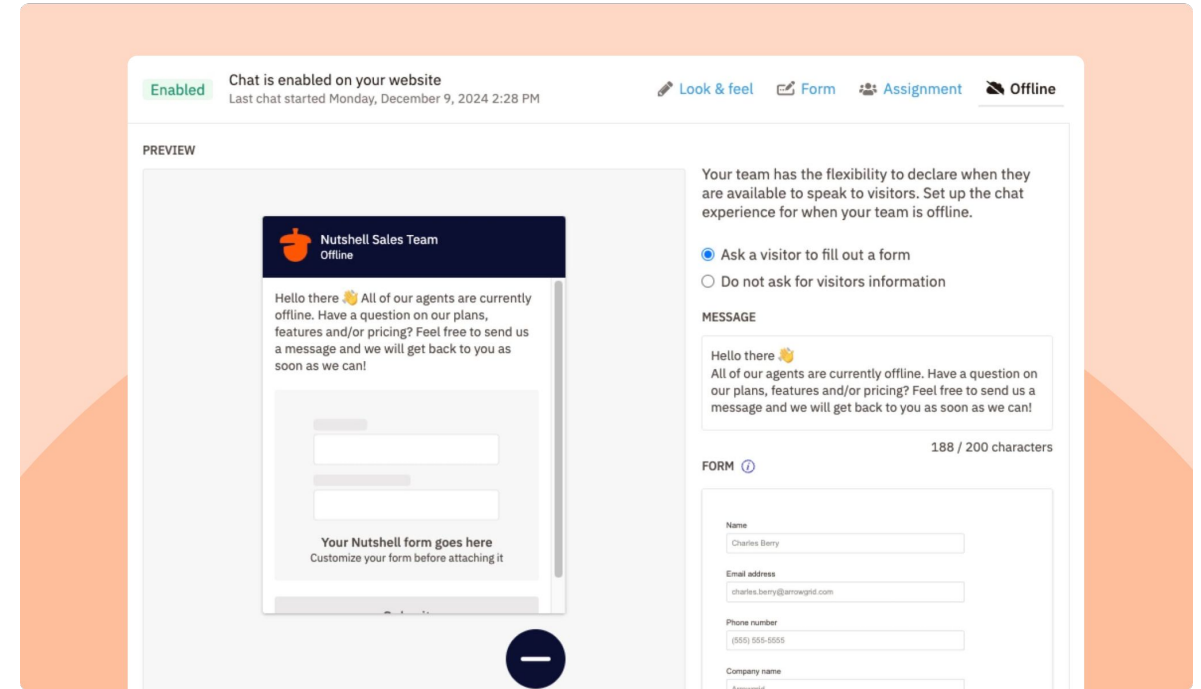
Nutshell Web Chat



Nutshell Web Chat

- Create a custom Web chat widget to **engage directly with website visitors** in real time.
- Find out more about Web chat here:
 - [Web Chat: How to Set Up and Manage Chat](#)
 - [Web Chat Features](#)
- View **past webinars** highlighting Web chat:
 - [Nutshell's Lead Gen Tool Kit](#)
 - [Engage With Website Visitors Through Your CRM](#)
- Web chat is included for **ALL Nutshell customers**

**Available on our Engagement Foundation plan, included with any Nutshell Sales plan*



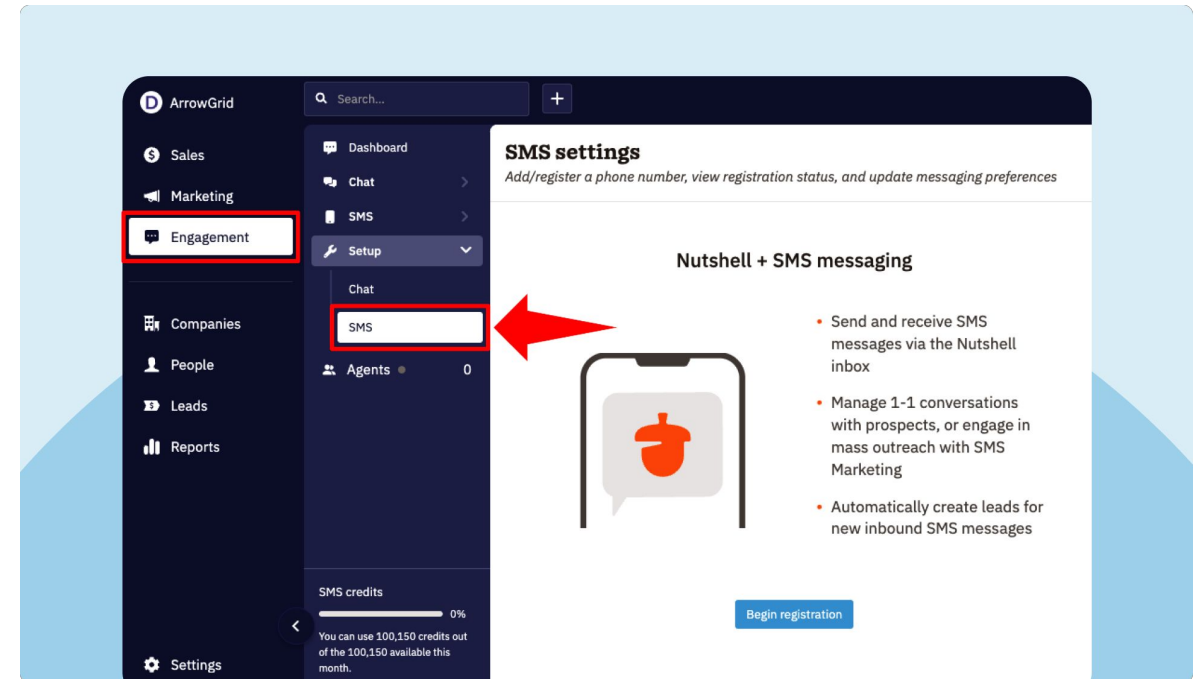
Nutshell 1:1 SMS



Nutshell 1:1 SMS

- Streamline SMS messages to leads and customers through **1 local line for your business**
- Use 1:1 SMS as a **lead gen tool on your website** by interacting with contacts where they're most engaged
- All **conversations automatically sync** with Lead, People, and Company records
- Learn more about Nutshell 1:1 SMS here:
 - [Nutshell SMS: How to Send and Manage Texts](#)
 - [Nutshell SMS Features](#)
- View **past webinars** highlighting Nutshell 1:1 SMS:
 - [Discover Nutshell's Marketing Tools](#)
 - [Leverage SMS in Your CRM](#)

**Available on our Engagement Pro plan - 150 free outbound messages per user included*



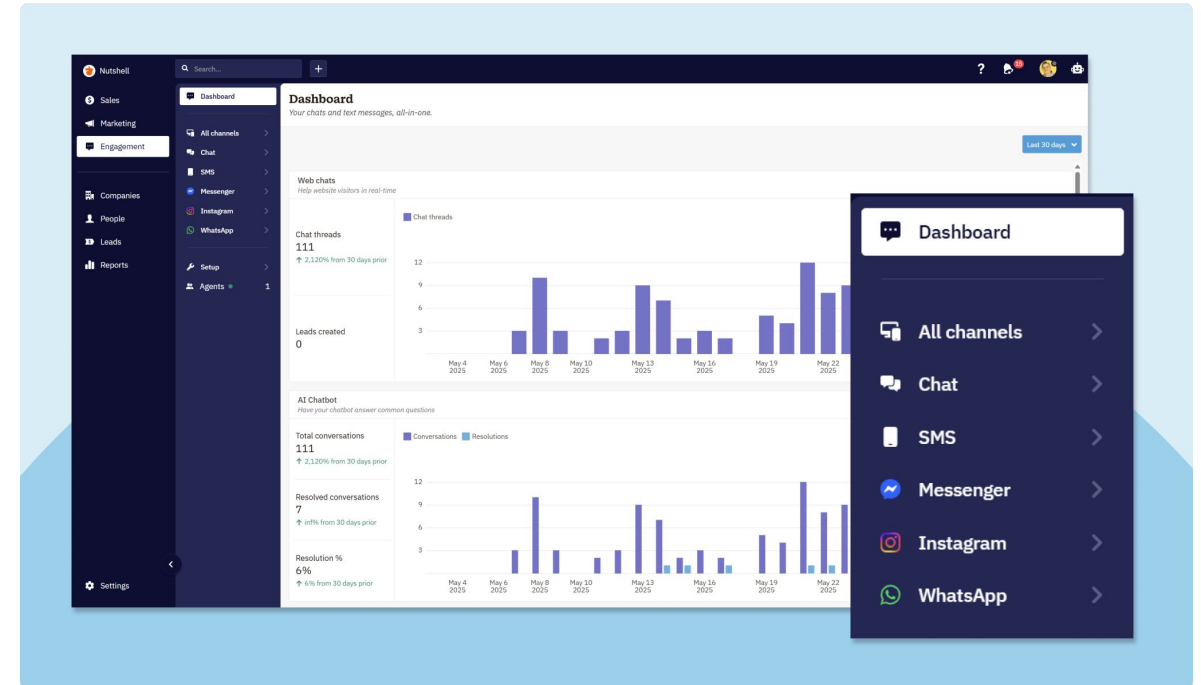
Third-Party Messaging App Integrations



Third-Party Messaging App Integrations

- **Connect with customers and prospects** on their favorite messaging platforms:
 - **Facebook Messenger**
 - **Instagram DMs**
 - **WhatsApp**
- Leverage **omnichannel engagement** to meet customers & leads on their preferred platforms without leaving your CRM
- Simplify **interaction tracking & management** across multiple messaging apps with a central hub inside your CRM

**Available on our Engagement Pro plan*

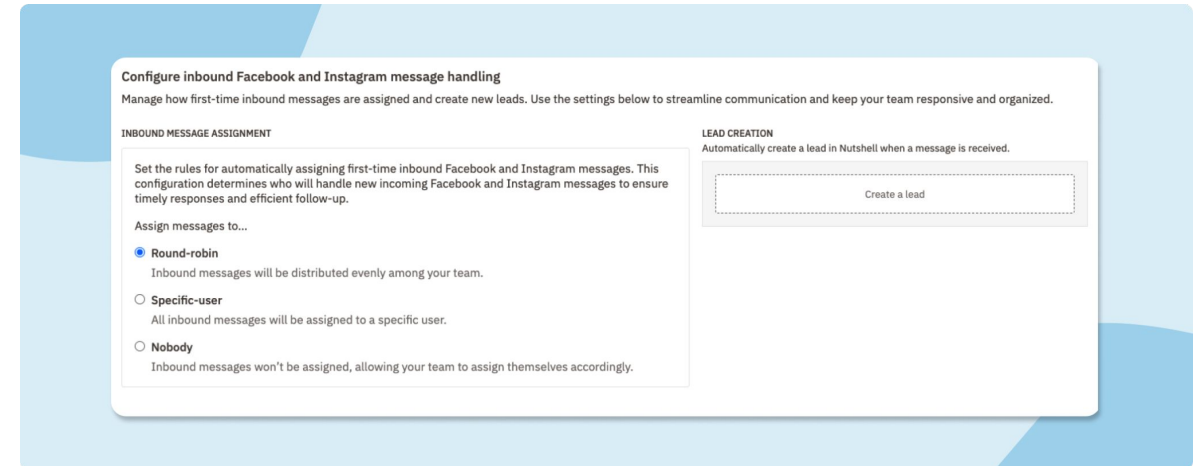


FB Messenger & Instagram DMs



Facebook Messenger & Instagram DMs Integration

- To get started, you'll need:
 - Nutshell **Engagement Pro** Plan
 - **FB Business** Account
 - **Instagram Professional** Account linked to your FB Page
- Setup steps:
 - Navigate to the **Engagement menu**, then locate the **Facebook Setup** section
 - Connect your Facebook Business account via the admin user's **personal Facebook login**
 - Select the **Facebook Pages** you wish to sync with Nutshell
 - Enable the '**Connected tools**' toggle in Instagram's message control settings
- Learn more about this integration here:
 - [Facebook Messenger & Instagram DMs Integration](#)
 - [Third-Party Messaging Apps Features](#)



WhatsApp



WhatsApp Integration

- To get started, you'll need:
 - Nutshell **Engagement Pro** Plan
 - **WhatsApp Business** Account managed via the Meta platform
- Setup steps:
 - Go to **Engagement > Setup > WhatsApp** in Nutshell
 - Click '**Connect your WhatsApp Business account**' & follow the setup through Facebook/Meta
 - Input business details & choose to link a **new or existing** WhatsApp Business account
 - Complete the prompts to **finalize the connection**
- Learn more about this integration here:
 - [WhatsApp Send/Receive Messages from Nutshell](#)
 - [WhatsApp Business Integration Blog](#)



Instagram DMs, Facebook Messenger & WhatsApp Demo



Additional Resources

Explore [Nutshell's Engagement Suite features](#) & discover the tools available to simplify customer and lead engagement from inside your CRM.

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

With Nutshell's **integrated engagement tools**, you can **streamline messaging management** and **meet customers where they are.**

Q&A

Recent Releases:

- **AI Agents:** Use Nutshell's Agents to help you complete tasks like building a sales process or researching a lead.
- **Scheduler Managed Events:** Admin users can create Scheduler events and push them live for all Nutshell users.
- **Email Preference Center:** Set up email preferences to let your subscribers choose the messages they want to receive.

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

Upcoming releases:

- **Google Meets + AI:** Automatically transcribe, summarize and log Google Meet calls.
- **Form Answer Rules (Improved Automation):** Tie specific web form responses to automated actions in Nutshell, like assigning tags, audiences, pipelines, and source to leads.
- **Activity Dialogue Redesign:** Experience a sleeker, fresher, more intuitive flow for logging activities in Nutshell.
- **And more!**

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

Thanks for joining us today!

Join our monthly support-led webcast

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 **June 25th, 2025** at **12:00 PM EST**.