



Scheduler

Book and Manage Appointments From Your CRM

Join us to discover Nutshell's built-in online meeting scheduler. With Scheduler, you can easily plan, collect, and manage bookings with your team and prospects, all without leaving Nutshell.



Andy Fowler
CEO & Co-founder of
Nutshell



Will Gordon
Director of Marketing
at Nutshell

Today's Agenda

- What is Scheduler? 5 minutes
- Benefit of having Scheduler in your CRM 5 minutes
- How to use Scheduler 10 minutes
- Walkthrough video 5 minutes
- How to get started 5 minutes

- Q&A

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

What is Scheduler?

- Meeting scheduling software in your CRM
- Allow invitees to book time based on your availability
- Collect information through forms, and **more!**

Meet with:
Vanessa Wilkinson

Client check-in
A meeting to assess and strengthen client relationship, review past activities, address any concerns, and identify opportunities for further collaboration.

🕒 30 minutes
📍 A Zoom link will be emailed to all participants

< May 2023 >

| SUN | MON | TUES | WED | THUR | FRI | SAT |
|-----|-----|------|-----|------|-----|-----|
| 30 | 1 | 2 | 3 | 4 | 5 | 6 |
| 7 | 8 | 9 | 10 | 11 | 12 | 13 |
| 14 | 15 | 16 | 12 | 18 | 19 | 20 |
| 21 | 22 | 23 | 24 | 25 | 26 | 27 |
| 28 | 29 | 30 | 31 | 1 | 2 | 3 |

Choose a time:

9:00 AM

9:30 AM

10:00 AM

10:30 AM

11:00 AM

11:30 AM

12:00 PM

Next



Why do I want my meeting tool in my CRM?

- Collect information from invitees via custom forms
- Automatically add Nutshell People, Companies and Leads with each invitee
 - Add invitees to marketing audiences
 - Channel invitees through pipelines
 - Assign tags to People, Leads, and Companies
- Log meetings as activities in Nutshell
- Automate your sales process
- Be notified of new bookings in Nutshell
- Get rid of an integration

CREATE IN NUTSHELL:

The screenshot displays three automation rules under the heading 'CREATE IN NUTSHELL:'. Each rule is contained in a light gray box with a dashed border. The first rule, 'Create a person', features a person icon, the text 'Audiences: Shipping News', and an 'Edit rules' link. The second rule, 'Create a lead', features a green dollar sign icon, the text 'Pipeline: New Customer Pipeline, Tags: Attended sales demo', and an 'Edit rules' link. The third rule, 'Create a company', is currently empty and only shows the text 'Create a company'.

NOTIFICATIONS

The screenshot displays one notification rule under the heading 'NOTIFICATIONS'. The rule is contained in a light gray box with a dashed border. It features a bell icon, the text 'Notify me via Nutshell', and an 'Add a notification' link.

Let's Walk Through



Syncing with your calendar

- Sync your Google or Office 365 calendar for accurate availability
- Scheduler will only show time slots where you have openings in your calendar
- Bookings from Scheduler will automatically appear in your calendar

The image displays a calendar interface with two main views. The top view is a weekly calendar for the week of November 5th to 11th, 2024. It shows various events such as 'Kevin OOF', 'Work item triage', 'Crew standup', 'Experience studio sync', 'Design session', 'Update feature li', 'Lucy swimming class', 'Weekly product team sync', 'Lunch with mom', 'Team Lunch', 'Design review', and 'Culture Conversatio'. The bottom view is a monthly calendar for November 2024, showing a grid of days from Sunday to Saturday. A meeting titled 'Marketing All hands' is highlighted, and a details panel is open for a '30-minute meeting' with Will Gordon. The details panel includes a 'Choose a time' section with a calendar grid for November 2024 and a list of time slots: 11:00 AM, 12:30 PM, 1:00 PM, 1:30 PM, and 2:00 PM. The current time is 1:38 PM Eastern Standard Time.

Meeting types



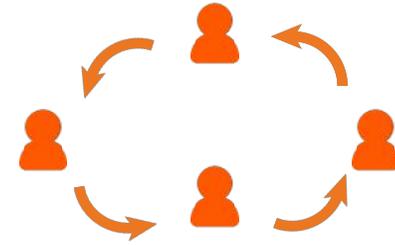
Solo

- For 1-on-1 meetings between you and a customer/lead
- Only considers your calendar availability and Scheduler meeting settings



Co-host

- For meetings with 2 people at your company and a customer/lead
- Considers both host's calendar availability and Scheduler meeting settings



Round-robin

- For 1-on-1 meetings between a member of your team and a customer/lead
- Considers all potential hosts' calendars
- Will **maximize your availability** to prospects, and fairly distribute meetings

Setting up a new meeting

- Configure meeting details:
 - Name & Description
 - Booking confirmation message
 - Meeting duration
 - Minimum notice
 - Buffer time
 - Location (virtual, in-person, phone call)
 - Activity type
 - Reminders
 - Additional attendees

HOST [Add co-host\(s\)](#)

Jewell July
Eastern Standard Time (8:40 AM)

NAME
30-minute discovery call

DESCRIPTION
Uncover prospect pain points and discover solutions.

BOOKING CONFIRMATION MESSAGE
Thanks for booking a meeting with me! I look forward to hearing about your company's needs!

DURATION
🕒 30 minutes

LOCATION
Google Meet
Links provided for each booking

ACTIVITY TYPE
Meeting

REMINDERS

Send a reminder email to avoid manual follow-up with invitees:

- When the meeting is booked
- 1 day before
- 30 minutes before

MINIMUM NOTICE

The minimum amount of notice required before someone can book this meeting:

3 Hours

START TIMES

Show invitees time slots in the following increments:

30 minutes

BUFFER TIME

Reserve time before or after this meeting is booked

- Buffer before 15 minutes
- Buffer after 15 minutes

ALLOW ADDITIONAL ATTENDEES

- Allow invitees to invite additional attendees to this meeting

Combining Scheduler & Nutshell Forms

- Set up a form
- Add the custom fields to collect the information you'd like to receive before the meeting
- Create/Update a Person, Company or Lead record in Nutshell
- Automatically add Tags or add to a marketing Audience
- Set up notifications for an extra indicator that a meeting was booked.

The image shows a Scheduler form on the left and its field mapping in Nutshell on the right.

Scheduler Form:

- Meet with: Jewell July
- 30-minute discovery call**
- Uncover prospect pain points and discover solutions.
- 🕒 30 minutes
- 📧 Google Meet link provided in confirmation email

Form Fields:

- Name** (Person icon): Charles Berry (Required)
- Email address ***: charles.berry@arrowgrid.com
- Pain points**: Enter pain points
- Add a field** (button)

Field mapping:

- Field mapping**: This field maps to the **Name** field in Nutshell.
- Name** (Person icon)
- This field can't be removed because all Scheduler forms must include the Name field*

Publishing, Sharing and Managing Scheduler Meetings

- Preview & Save your Scheduler meeting
- Invite participants by:
 - sharing a direct link
 - embedding Scheduler on your website or landing page
- Manage bookings from your Scheduler page
 - View invitees and form details

The screenshot shows the Scheduler interface for a meeting titled "30-minute discovery call". At the top, there is a calendar icon, the meeting title, and a breadcrumb trail: "Scheduler > 30-minute discovery call". To the right, there are several controls: a checked checkbox "Let people book this meeting", a "Preview" button, a "Copy link" button, and a "Share" button. Below this, the meeting status is "Active" with "4 bookings" and "Last booked Friday, July 12, 2024 12:09 PM". There are also links for "Meeting details", "Form", "Advanced options", and a highlighted "Bookings" button. A table below displays the booking details:

| Meeting | Date | Status | Booked by | Date booked | Form submission | |
|--|-----------------------|-----------|-----------|-------------------|-----------------------------|---|
| HBapoo & Hamida S - 30-minute discovery call | August 1st at 9:45 AM | Scheduled | HBapoo | Today at 12:09 PM | All details | Reschedule Cancel |

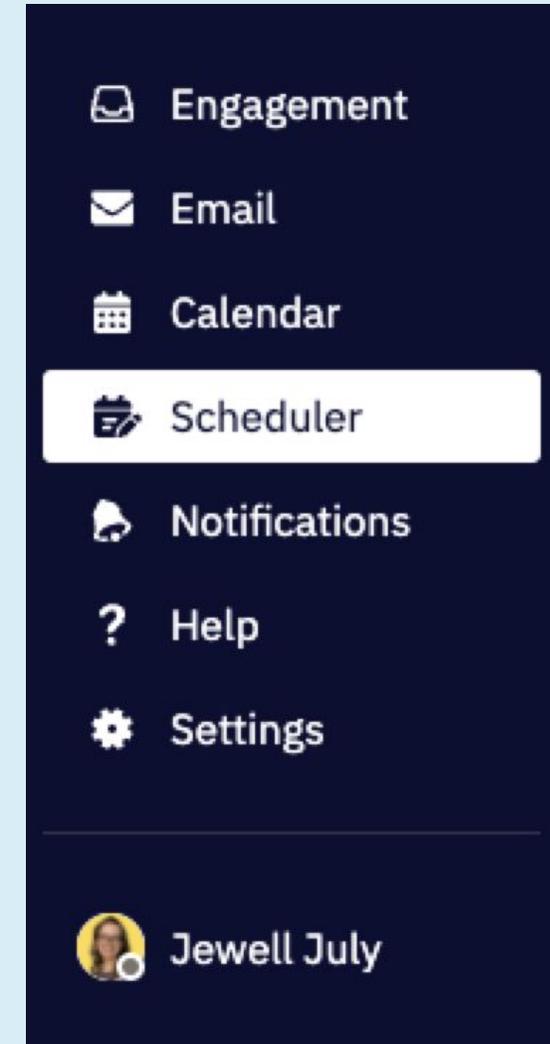
Scheduler & automations within Nutshell

- Sync meetings with your calendar
- Log activities in Nutshell
- Create/Update People, Company & Lead records
 - Collect additional data
 - Add a tag
 - Add to Audience
- Activity appears on timeline
- Progress to next pipeline stage if the activity is your stage goal
- Zoom Meeting transcription and summarization (*Business+ feature*)



How to access Scheduler

- Scheduler is now included in Pro and above
- **Scheduler Lite** - *available on Pro CRM plan*
 - Standard capabilities
 - Multiple attendees
 - Unlimited usage
 - Nutshell branded
- **Scheduler** - *available on Business and Enterprise CRM plans*
 - Round-robin assignment
 - Host Scheduler links on your custom domain instead of Nutshell-provided domain
 - No Nutshell branding



Q&A

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 November 27, 2024 at 12:00 PM EST.

Thanks for joining us today!

Recent releases:

- **Marketing dashboard:** track how your Nutshell marketing efforts are performing, all in one place
- **SMS:** leverage text messaging in your CRM
- **Marketing email templates:** ensure consistent branding across your company emails
- **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

Upcoming releases:

- **Nutshell Chat:** enable conversations directly from your company website
- **Click-to-Call AI transcription & summarization:** Transcribe and summarize click-to-call phone calls using AI

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