



Nutshell Chat

Engage With Website Visitors Through Your CRM

Join us to discover Nutshell's built-in chat messaging feature that lets website visitors start a conversation with you directly from your website.



Andy Fowler
CEO & Co-founder of
Nutshell



Will Gordon
Director of Marketing
at Nutshell

Today's Agenda

- What is Chat? 5 minutes
- What can I do with Chat? 5 minutes
- Walkthrough video 5 minutes
- LIVE Demo 5 minutes
- How to use / Who can use Chat 15 minutes
- How to get started 5 minutes

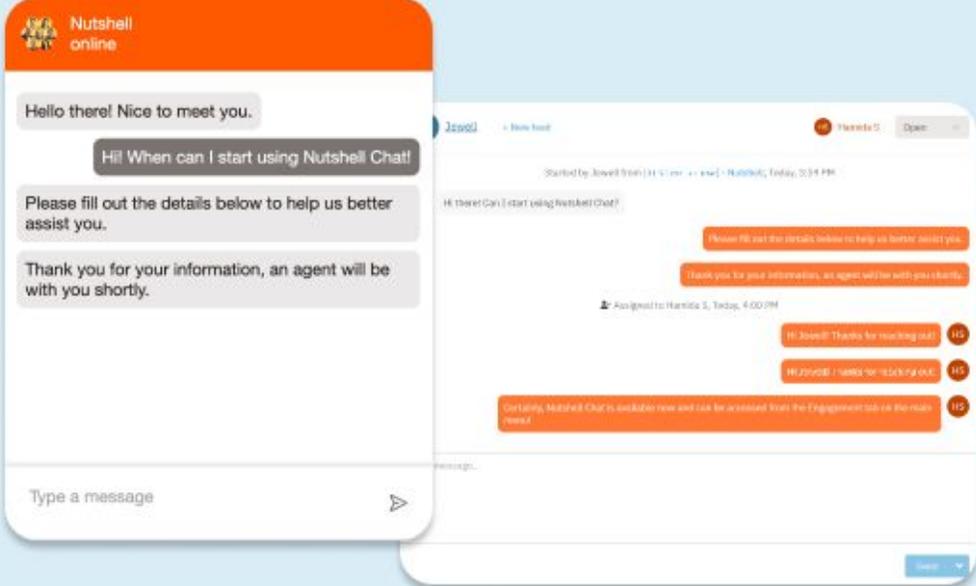
- Q&A

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

What is Chat?

- Web-based messaging feature for online chat
- Allow website visitors to chat directly with your agents in real time
- Gather information about visitors, automatically create leads, and more!

Nutshell Chat

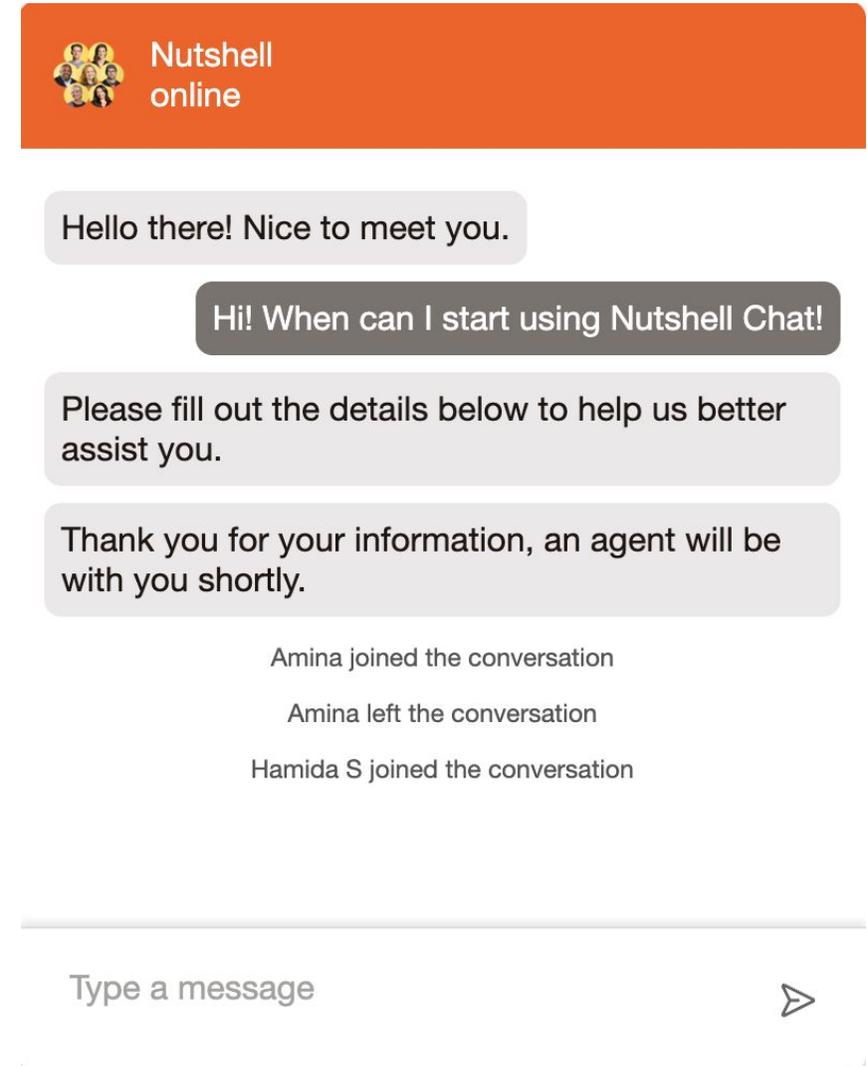


The image displays two overlapping screenshots of the Nutshell Chat interface. The left screenshot shows a chat window with a header 'Nutshell online' and a message history: 'Hello there! Nice to meet you.', 'Hi! When can I start using Nutshell Chat?', 'Please fill out the details below to help us better assist you.', and 'Thank you for your information, an agent will be with you shortly.' The right screenshot shows a chat window with a header 'New chat' and a message history: 'Hi! When can I start using Nutshell Chat?', 'Please fill out the details below to help us better assist you.', 'Thank you for your information, an agent will be with you shortly.', 'Assigned to Harida S, Today, 4:00 PM', 'Hi Harida! Thanks for reaching out!', 'Hi Harida! I will be reaching out.', and 'Continuing, Nutshell Chat is available now and can be accessed from the Engagement tab in the main panel.' Both screenshots show a 'Type a message' input field at the bottom.

Engage with website visitors through chat

What can I do with Chat?

- Chat with website visitors in real time
 - Answer questions, provide resources, and connect them with the answers they need
- Collect information from visitors via custom forms
- Automatically create leads from Chat visitors
 - Channel visitors through pipelines
 - Trigger other Nutshell automations like email and SMS messages
- Be notified of Chat assignments and responses in Nutshell
- Get rid of an integration



The screenshot displays a chat interface with an orange header bar. On the left of the header is a circular icon containing five profile pictures, and to its right, the text "Nutshell online" is displayed. The chat area contains several messages in light gray bubbles: "Hello there! Nice to meet you.", "Hi! When can I start using Nutshell Chat!", "Please fill out the details below to help us better assist you.", and "Thank you for your information, an agent will be with you shortly." Below these messages are three status notifications: "Amina joined the conversation", "Amina left the conversation", and "Hamida S joined the conversation". At the bottom, there is a white input field with the placeholder text "Type a message" and a right-pointing arrow icon.

Let's Walk Through Chat

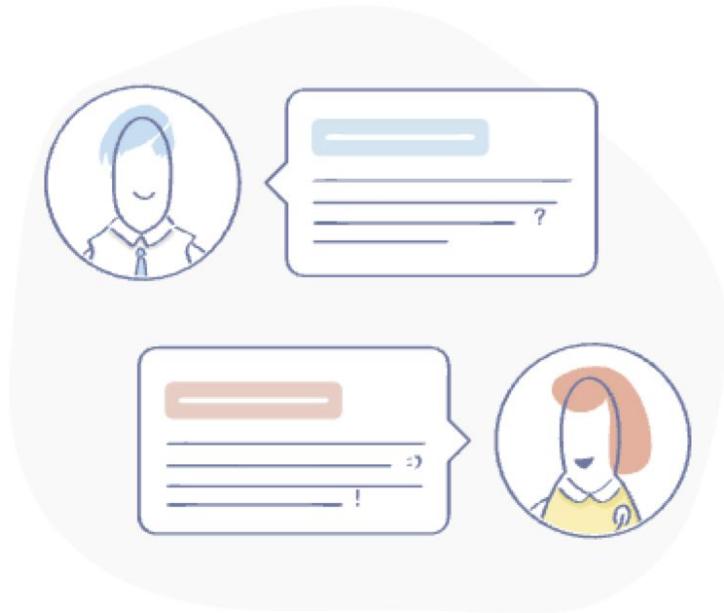
Setting up Chat

- Customize Chat widget to embed on your site
 - Brand colors and logo
 - Nudge and conversation starter messages
- Create your intake form
 - Name, phone, email
- Set visitor assignment rules
- Configure the offline experience
 - Add an optional Nutshell Form to collect information when your team is offline

The screenshot shows the configuration interface for the Nutshell chat widget. At the top, it indicates the chat is enabled on the website, with the last chat started on Tuesday, November 26, 2024 at 4:03 PM. Navigation options include 'Look & feel', 'Form', 'Assignment', and 'Offline'. The main area is divided into a 'PREVIEW' section on the left and a configuration panel on the right. The preview shows a chat window for 'Nutshell Sales Team Online' with a welcome message from an agent and a text input field. The configuration panel includes options for 'WIDGET COLOR' (with a color palette), 'WIDGET ICON' (with various icons), 'NAME DISPLAY' (set to 'Nutshell Sales Team'), 'CONVERSATION STARTER' (with a default welcome message), and 'NUDGE' (with a checkbox for 'Display nudge to visitors' and a default message). A 'Save changes' button is at the bottom right.

Managing your Chat team

- Add your agents
 - Settings > Users & teams > toggle on the *Engagement* option next to the user (more details later!)
- Set agent availability
 - Either “Available” or “Not accepting chats”
 - Agents can also set their own availability from their Nutshell avatar
- Monitor the number of chats each agent is handling



Agent	Status	Open chats
Andy Fowler	● Available	0
Will Gordon	● Available	0

Managing Chat threads

- View all Chat threads in one location
 - Unassigned
 - Open
 - Needs reply
 - Closed
- Open your visitors' pages directly from the thread
- Create new leads from the thread
- Assign or reassign agents to threads
- Close or archive threads

CHATS	
Unassigned	0
Open	0
Needs reply	0
Closed	1

The screenshot displays a chat window with the following elements:

- Header:** A blue circle with 'J' for 'Jewell' and a '+ New lead' button. On the right, a red circle with 'HS' for 'Hamida S' and an 'Open' dropdown menu.
- Message History:**
 - A system message: 'Started by Jewell from [11:41:11: 11:41] - Nutshell, Today, 3:59 PM'.
 - A message from Jewell: 'Hi there! Can I start using Nutshell Chat?'.
 - Two orange system messages: 'Please fill out the details below to help us better assist you.' and 'Thank you for your information, an agent will be with you shortly.'
 - An assignment notification: 'Assigned to Hamida S, Today, 4:00 PM'.
 - Two orange messages from Hamida S: 'Hi Jewell! Thanks for reaching out!' (twice).
 - A final orange message from Hamida S: 'Certainly, Nutshell Chat is available now and can be accessed from the Engagement tab on the main menu!'.
- Input Area:** A text field with the placeholder 'Type a message...' and a blue 'Send' button with a dropdown arrow.

How to access Chat

- Users need Engagement Suite to use Chat
 - **Unlimited chats during beta launch**
 - *Engagement Pro* also enable users to send texts through SMS!
- To purchase Engagement Suite:
 - Settings > Users & teams > toggle on the *Engagement* option next to the user
- Go to [our Engagement Suite page](#) to calculate your cost
- To start using Chat, go to Engagement > Chat under Settings

Nutshell Engagement

Plan	Engagement Foundation	Engagement Pro
Price	\$0/user	\$16/user/month
Outgoing SMS messages per user	0	100
Chat threads	Unlimited during beta	Unlimited during beta

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 January 22, 2025 at 12:00 PM EST.

Thanks for joining us today!

Recent releases:

- **Click-to-Call AI transcription & summarization:** Transcribe and summarize click-to-call phone calls using AI (available on Business and Enterprise)
- **Scheduler round-robin assignment:** distribute Scheduler bookings between team members
- **Marketing dashboard:** see key efforts for your Nutshell marketing efforts at a glance
- **SMS:** send text messages to contacts from inside Nutshell and trigger automations to nudge prospects down the funnel
- **Marketing email templates:** save marketing email templates to share across your team

Upcoming releases:

- **SMS Campaigns:** trigger SMS broadcasts and drip sequences for marketing campaigns

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