



Nutshell Forms



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at Nutshell



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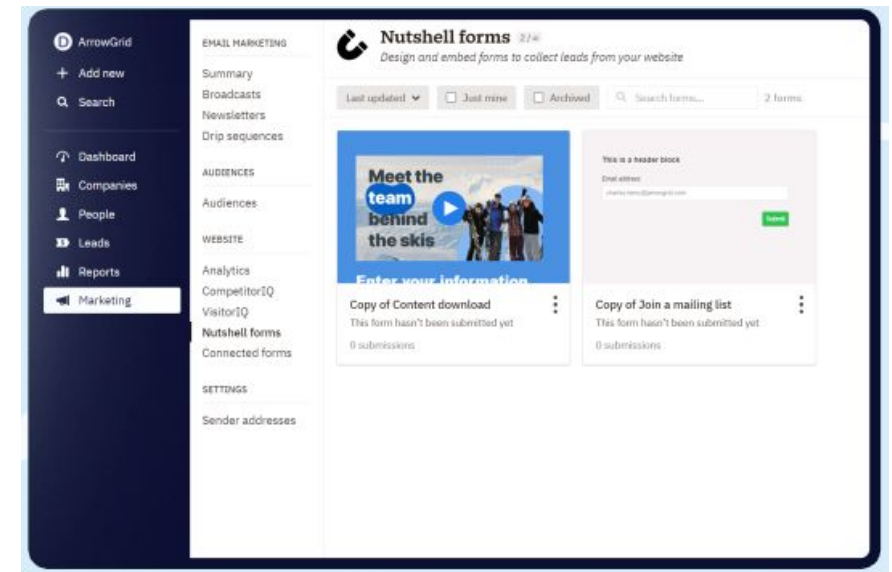
Today's Agenda

- 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

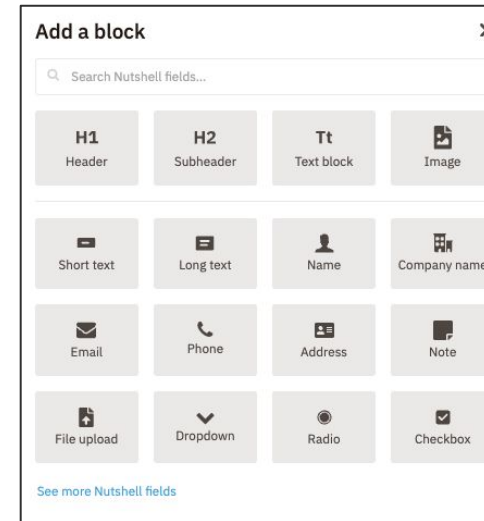


- Free vs paid subscriptions
 - Online form builders can vary in price and features
- Both give you the option to sync data directly into Nutshell
- If you change a Connected form, you must also update your form mapping in Nutshell
- [Support article](#)

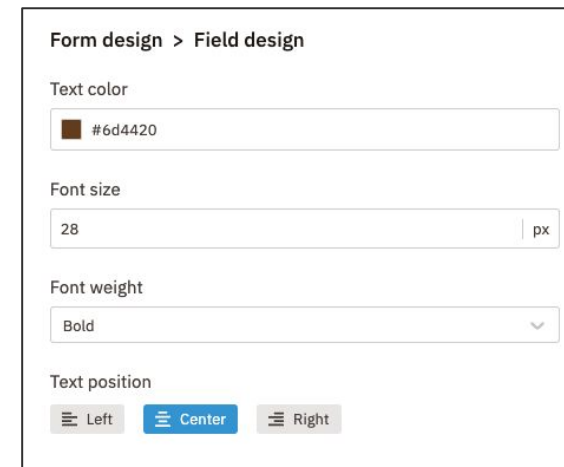


What Can You Do with Nutshell Forms?

- 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



A dialog box titled "Add a block" with a search bar "Search Nutshell fields...". It displays a grid of 16 field types: H1 Header, H2 Subheader, Tt Text block, Image, Short text, Long text, Name, Company name, Email, Phone, Address, Note, File upload, Dropdown, Radio, and Checkbox. A link "See more Nutshell fields" is at the bottom.



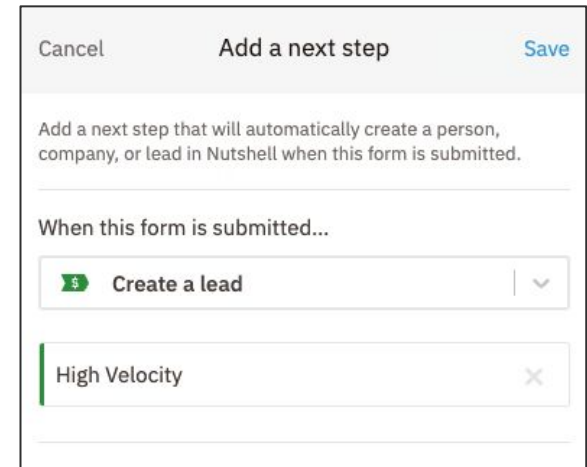
Form design > Field design

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

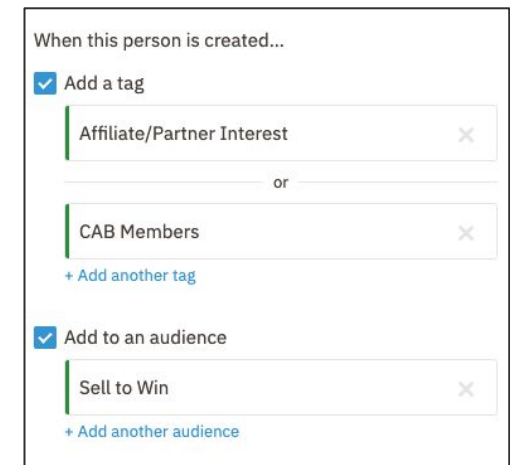


NEXT STEPS

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

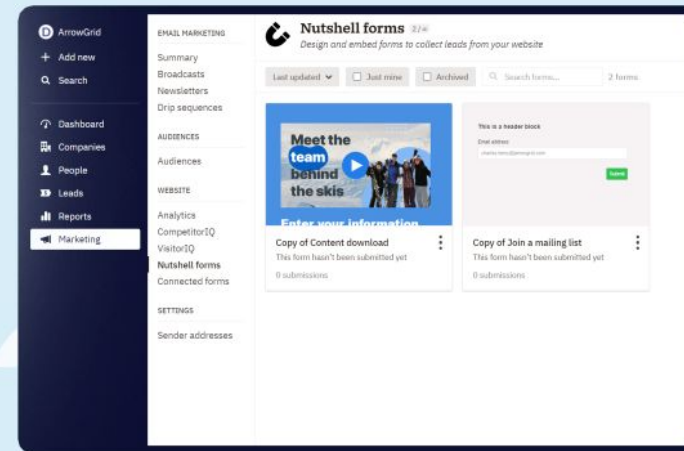
☒ Add to an audience

Sell to Win

+ Add another audience

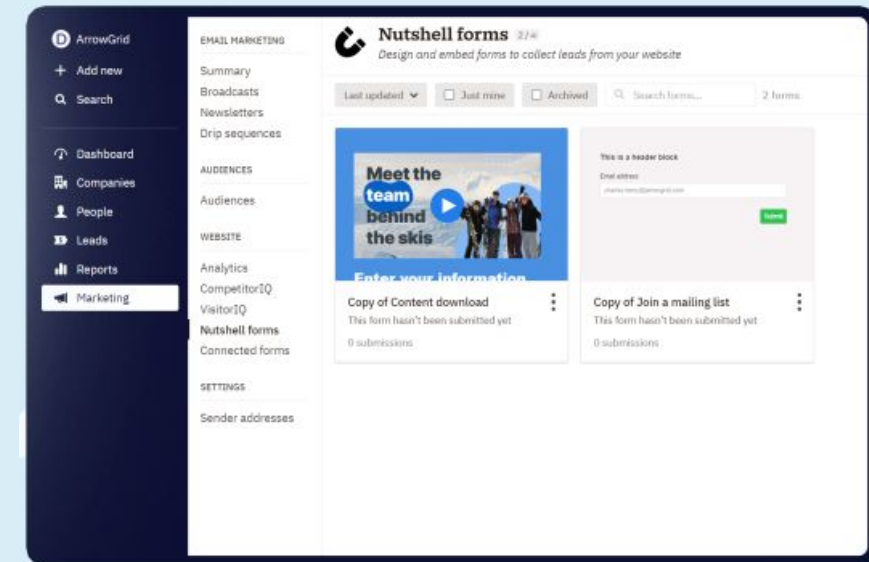
Let's Walk Through

Nutshell Forms



How to get/use Nutshell Forms

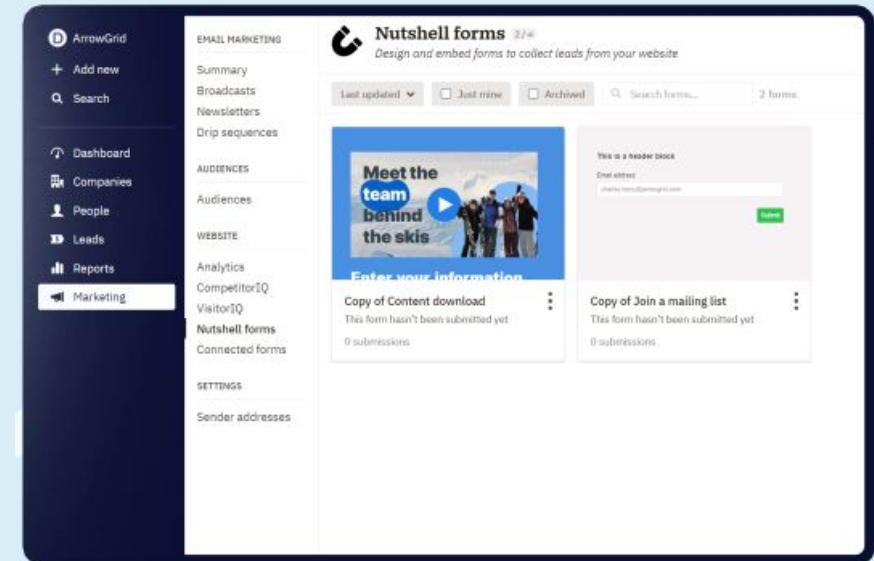
- All Nutshell tiers come with a set usage of Nutshell Forms
- When logged into Nutshell
 - Go to Marketing > Nutshell forms > create form
- No limits to how many times your forms can be filled out
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What's Next for Nutshell Forms

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