

NorthText Integration for HubSpot

Overview

- Create and send templated SMS messages within marketing campaigns using custom workflow actions
- View incoming and outgoing SMS events on the Contact timeline
- Real-time conversational messaging with SMS directly within HubSpot

Prerequisites

Before proceeding, make sure you have signed up for a NorthText account [here](#). Navigate to the api integration settings page [here](#) and generate an API key. You will use this to authenticate the app against the NorthText API.

Also make sure that you sign up for an account on app.expressintegrations.com.

Installation

You can install the app by visiting app.expressintegrations.com, selecting the integrations tab, clicking “Add a new integration”, and then the install button:

HubSpot NorthText Integration



[Install](#) [View Pricing](#)

Installing the app will automatically sign you up for a 14-day trial of the standard plan, which includes all features of the app. Next step is authorizing both NorthText and HubSpot.

Authorization

On the authorization screen, click the “Connect” button for each app.

Please authorize the following applications:

	NorthText		Disconnected	Connect
	HubSpot NorthText	22546182	Disconnected	Connect

API Key for NorthText

For NorthText, copy/paste the API key you generated into the box and press connect:



Connect to NorthText

Authentication Method*

API Key

API Key*



.....

Found in your integration settings in NorthText

Connect

Cancel

OAuth for HubSpot

For HubSpot, select the OAuth 2.0 option, and click the connect button. This will take you through to hubspot.com to select your desired portal to connect to and to approve the necessary permissions.



Connect to HubSpot NorthText

Authentication Method*

OAuth 2.0

Connect

Cancel

Once you are connected to both applications, the installation is complete! You'll be automatically signed up for a 14-day free trial.

Configuration

There are a couple of configuration options for the app that you can find in the settings page:

[← Back to connected apps](#)

NorthText SMS by Express Integrations

Express Integrations

General settings

General settings

These preferences apply only to this app and how it works in HubSpot.

Outbound SMS Timeline Events
Enabling this feature will create timeline events on the associated contact record to show that an SMS was sent to them via NorthText

Inbound SMS Timeline Events
Enabling this feature will create timeline events on the associated contact record to show that a contact replied by SMS to NorthText

You can turn on and off the contact timeline events for both inbound and outbound SMS messages.

Usage

You can add a custom workflow action to send a templated SMS to either a static phone number or a contact property:

SMS Test

Actions Settings Goals Changes

1. Send an SMS

Hey {First Name}, how's it going?

2. Delay for a set amount of time

4 days

3. If/then branch

First, check Exit Campaign

At least one NorthText SMS by Express
Integrations: NorthText SMS Reply
Timeline Event has Occurred is before 09/30/2022 (EDT)

Exit Campaign

Follow Up

Static list

Marketing Campaign 2022

5. Send an SMS

Hey {First Name}, just following up on my last message

5. Send an SMS

Edit action

Contacts in action

Send an SMS with NorthText

Send SMS to *

Select a property

Select a property *

Phone number

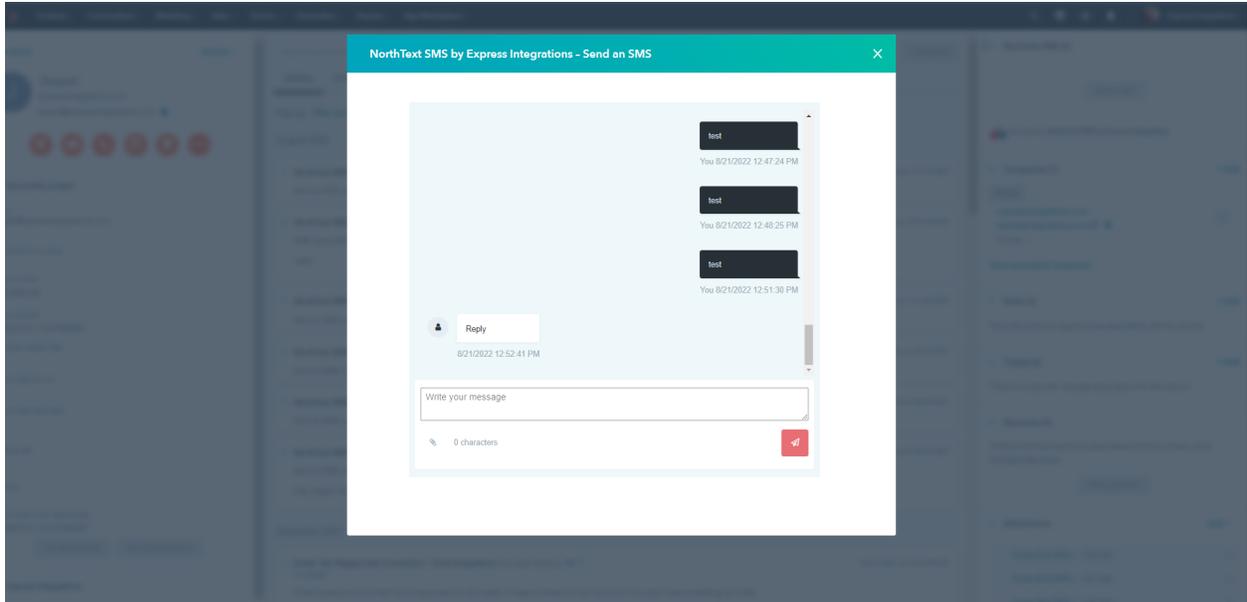
SMS Message *

Contact token

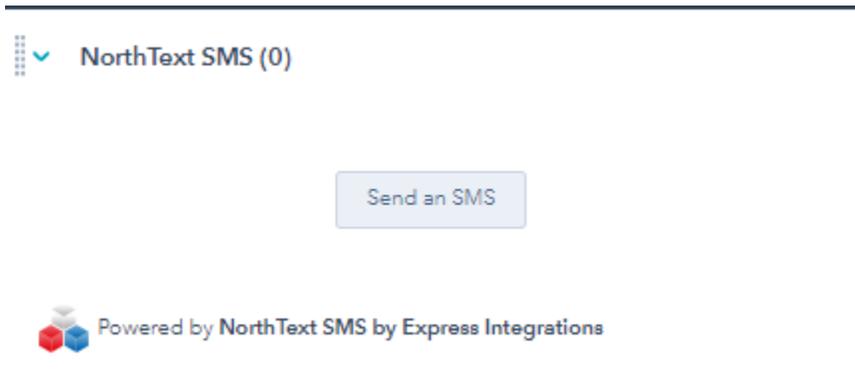
Hey {First name}, just following up on my last message

Save Cancel

You can also navigate to any contact record to open your SMS history and have a real-time conversation with them:



You can find this option by clicking the **Send an SMS** button on the integration card located in the right sidebar of the contact record:



Support

For any additional inquiries or feature requests, please submit your feedback to support@expressintegrations.com