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QUICK START GUIDE

HubSpot Integration

with BulkSMS.com

Connect HubSpot to the BulkSMS Integration Gateway, see every SMS and reply on your contacts, send from workflows and send bulk SMS to your lists.



Welcome to BulkSMS.com

Trusted, scalable SMS messaging for your business

IN THIS GUIDE

01 Connect HubSpot in one click

02 Send SMS from your workflows

03 Create templates and send bulk SMS

HubSpot

BULKSMS.COM INTEGRATION GATEWAY FOR HUBSPOT

VERSION 4.1 · UPDATED 2026/10/22

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01 Foreword

The HubSpot integration connects with a single sign-in—there are no API keys to copy. Before you start, make sure you have the following ready.

BulkSMS account
With your BulkSMS API details saved in the Integration Gateway

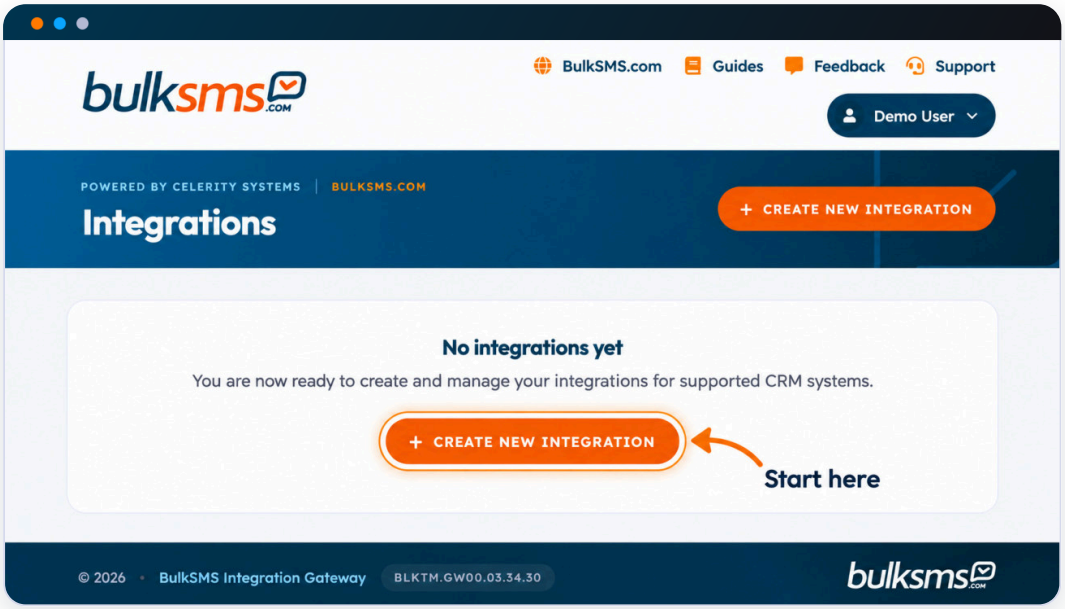
HubSpot login
A user who can install apps in your HubSpot account

Country code
The country most of your contacts are in, e.g. 44 for the UK

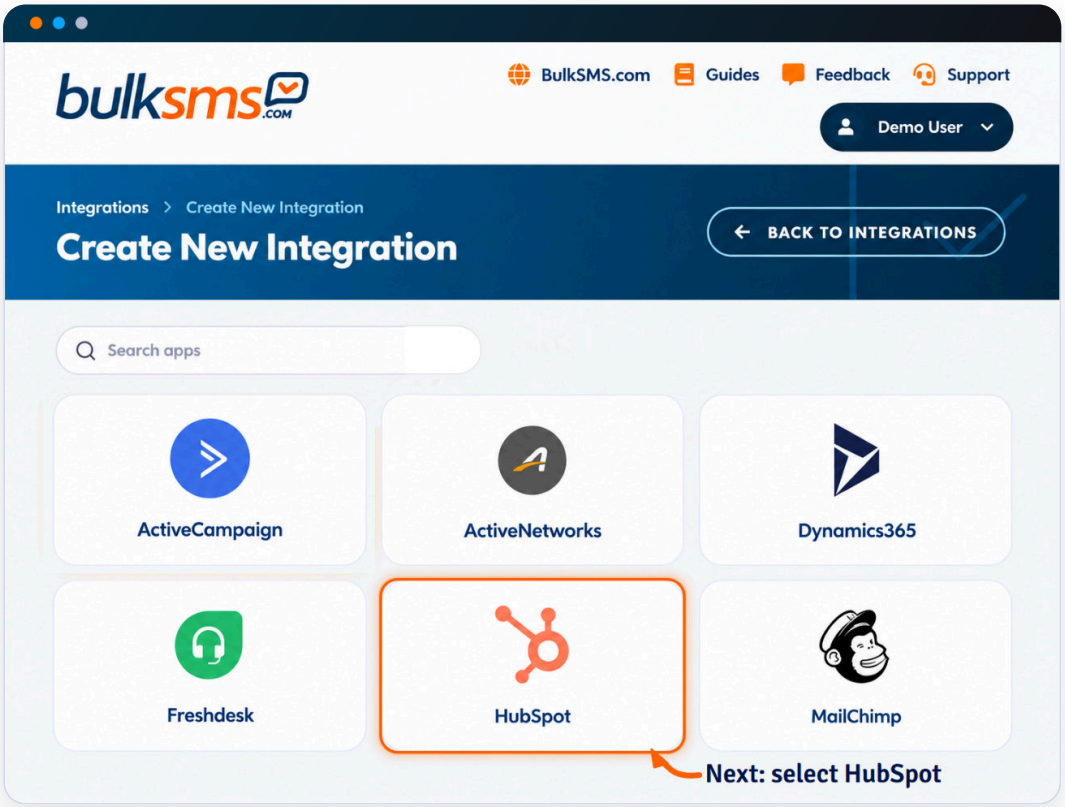
Authenticate asks you to configure your BulkSMS API details first if you haven't yet. Each HubSpot account can be connected to one integration only.

02 Integration Setup

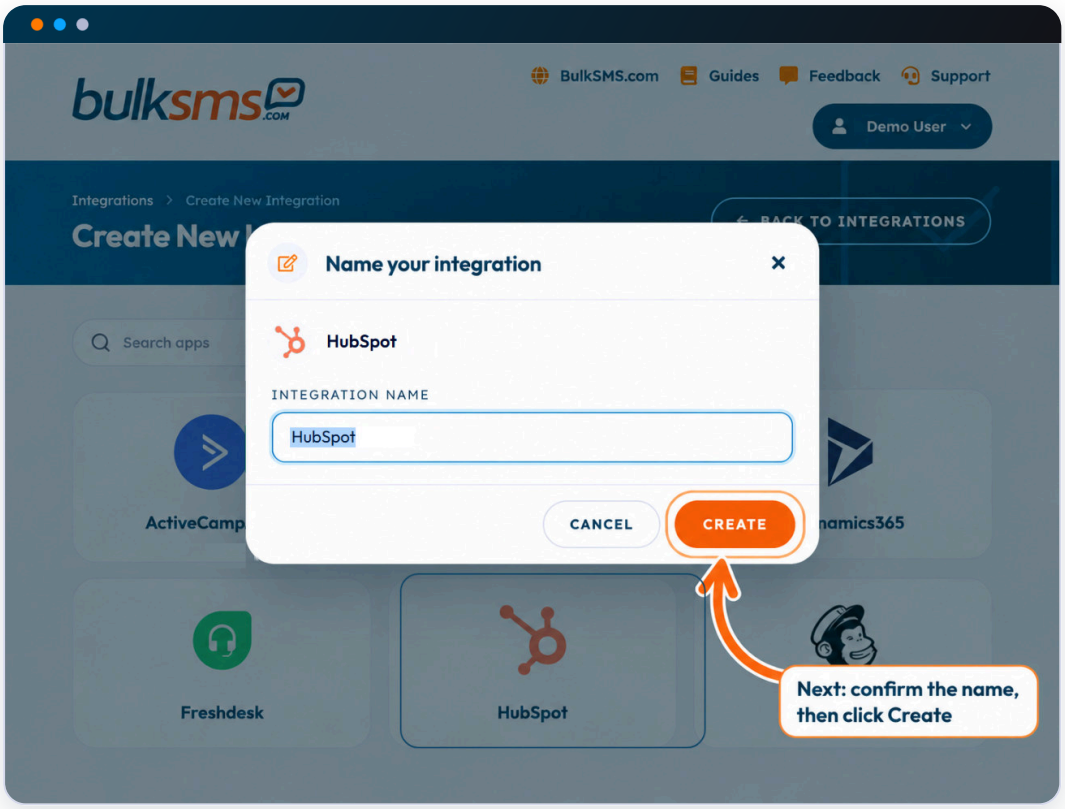
1 Sign up or log in to the BulkSMS Integration Gateway at bulksms.com/integration-gateway and click **Create New Integration**.



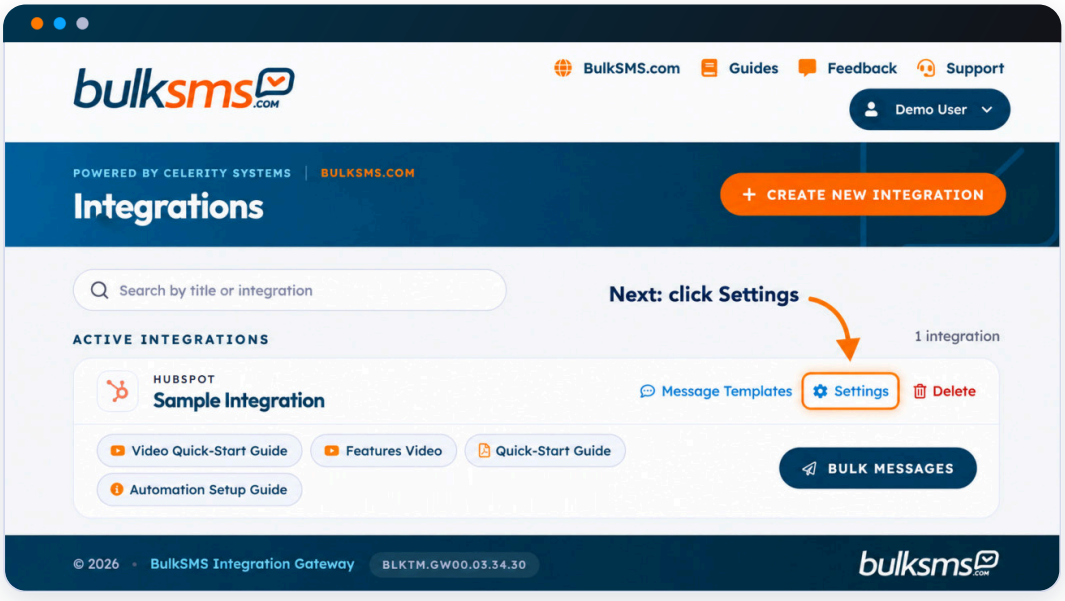
2 Select **HubSpot**. You can type in **Search apps** to find it quickly.



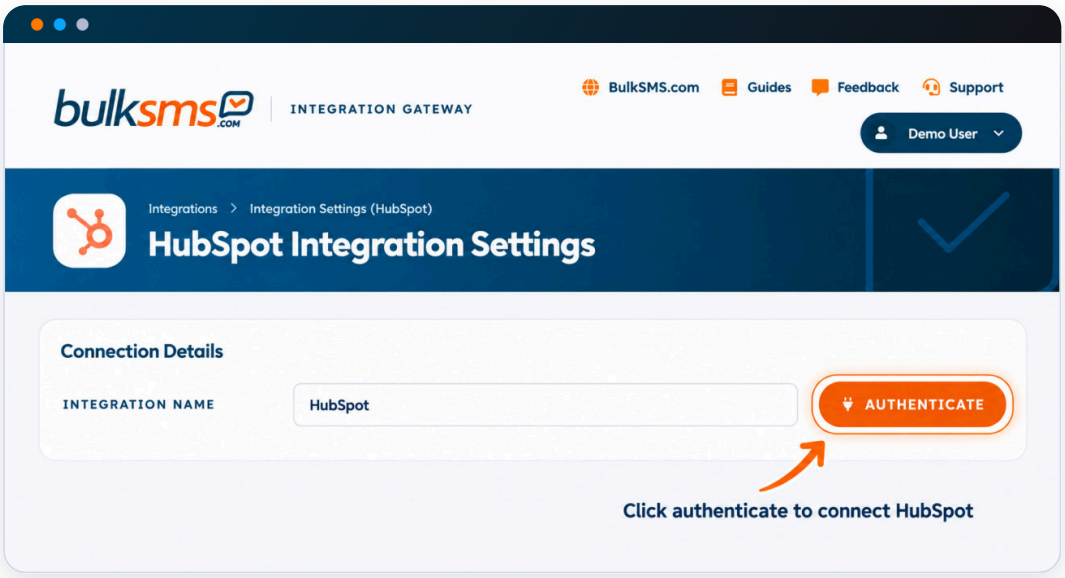
3 Give your integration a name, or keep the one suggested, and click **Create**. The name can use letters, numbers, spaces, hyphens and underscores, up to 40 characters.



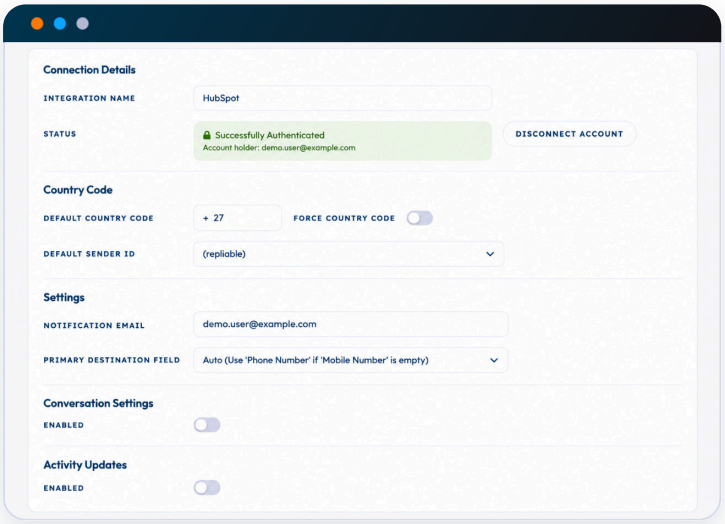
4 Your integration now appears on the Integrations page. Click **Settings**.



5 Click **Authenticate**. A HubSpot window opens: sign in, choose your HubSpot account and approve the BulkSMS app. This installs the BulkSMS Integration Gateway app in HubSpot.



6 Click **OK** to close the window. The Settings page now shows **Successfully Authenticated** and the HubSpot account holder's email address.



7 Complete the rest of the page, then click **Save Settings**:

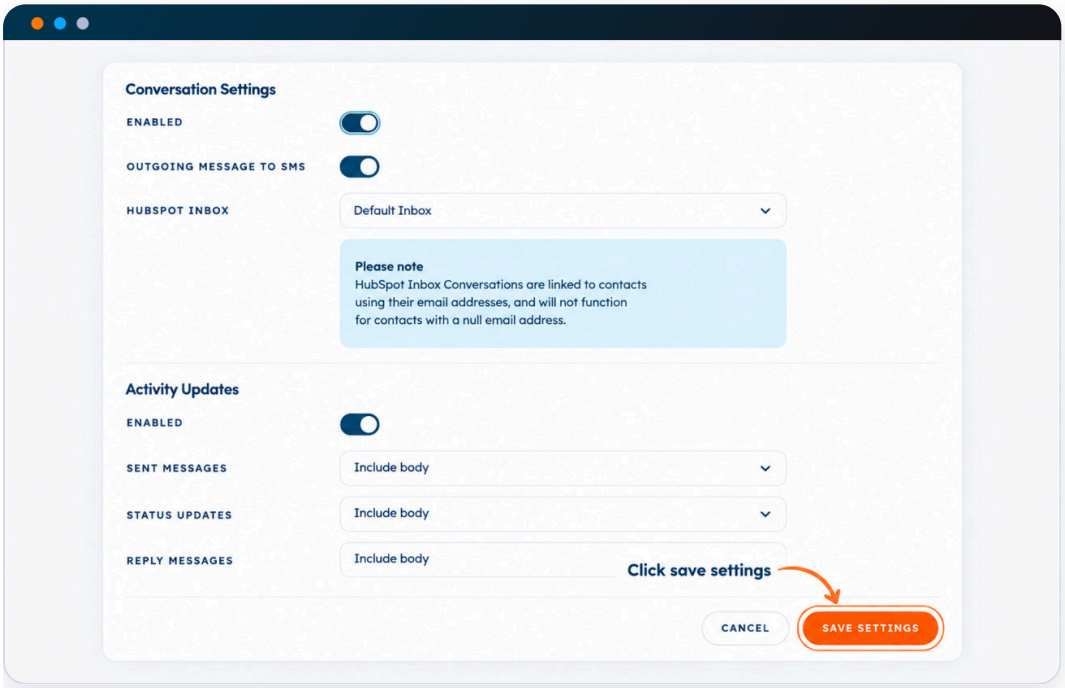
- **Default Country Code** – added to numbers that don't include one (see Sending Tips).
- **Default Sender ID** – the sender address used unless a message chooses another.
- **Notification Email** – where the Integration Gateway sends notifications about this integration.
- **Primary Destination Field** – which HubSpot number to text: **Mobile Number**, **Phone Number**, or **Auto** (Mobile Number, or Phone Number when the mobile is empty).

03 Activity Updates & Two-Way SMS

Activity Updates show what happens to your messages on the HubSpot contact record: when an SMS is sent, delivered or fails, and when the contact replies. They're switched on automatically the first time you authenticate.

Choose what's recorded

Scroll to **Activity Updates** on the Settings page. With **Enabled** ticked, each message type can be set to **Include body** (the activity shows the message text), **Exclude body** (the activity is recorded without the text) or **Disabled** (nothing is recorded).



OPTION	WHAT IT RECORDS ON THE CONTACT
Sent Messages	An activity each time an SMS is sent, showing the message, template and where it was sent from (a contact card, deal card or the workflow name).
Status Updates	An activity when the SMS is delivered or fails, with the reason for any failure.
Reply Messages	An activity when the contact replies, with the reply text.

If you send from workflows, leave **Sent Messages** on (Include or Exclude body). The sent record is what links later delivery reports and replies back to the right contact.

HubSpot Inbox (Conversations)

If your HubSpot account includes Sales Hub or Service Hub Professional or Enterprise, you can also sync SMS conversations with the HubSpot Inbox or Help Desk. Under **Conversation Settings**, tick **Enabled**, choose your inbox or help desk under **HubSpot Inbox**, tick **Outgoing message to SMS** if replies typed in HubSpot should be sent as SMS, then click **Save Settings**. If you're asked to **Re-Authenticate**, do so to grant the extra permissions.

- A conversation starts when a contact replies. The message they're replying to is shown with their reply, so your team can see what they're answering.
- SMS sent from workflows, deal and ticket automations or bulk messages are added to a contact's conversation only while it's open. They never start a conversation on their own, but they're still recorded on the contact's timeline through Activity Updates.
- In a help desk, each new conversation creates a ticket. When a contact replies to a closed ticket, HubSpot reopens it or creates a new one according to your help desk's ticket reopening settings.

Conversations are linked to contacts by email address, so they won't work for contacts without one.

Good to know

- Contacts can only reply to messages sent from a **(repliable)** sender address or a phone number—not from a text sender name.
- A reply is linked to the last message you sent to that number. If there isn't one, the integration looks the contact up by mobile number.
- If **Enabled** is unticked when you return to the page, the connection to your BulkSMS account needs setting up again—tick it and click **Save Settings**.

04 Automation Setup

Authenticating installs a **Send SMS via BulkSMS** action in HubSpot workflows, so you can text contacts automatically—for example when they fill in a form or reach a deal stage.

Automation Setup Guide

A step-by-step walkthrough of building a workflow with the Send SMS via BulkSMS action.

OPEN →

Video Quick-Start Guide

A visual introduction to setting up the integration.

OPEN →

Features Video

A tour of what the HubSpot integration can do.

OPEN →

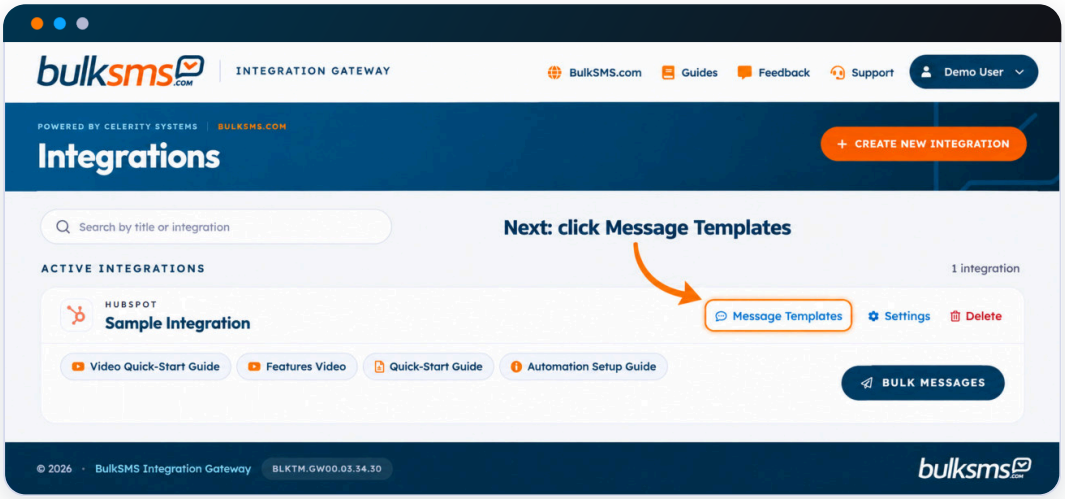
In the action, choose the sender, enter the country code to use and write your message, personalising it with HubSpot contact properties. Contact, deal and ticket workflows are all supported.

i Prefer webhooks? Each message template has a **Webhook info** link (the chain icon on the Message Templates page) with the URL and steps for sending that template from a HubSpot webhook.

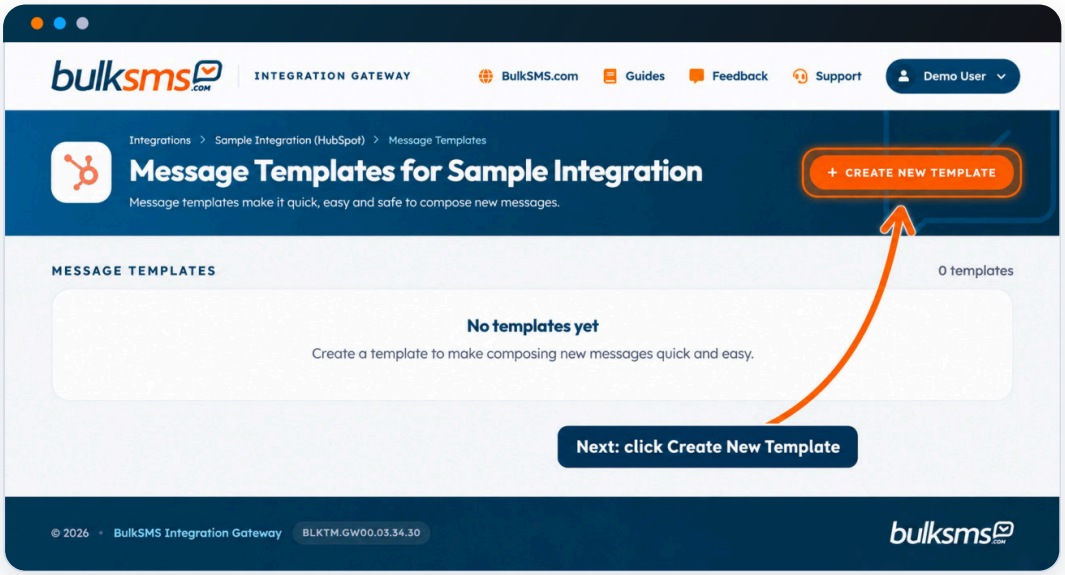
05 Message Templates

Templates let you save messages you send often, with tokens that personalise each message for the contact.

1. On the Integrations page, click **Message Templates** for your integration.

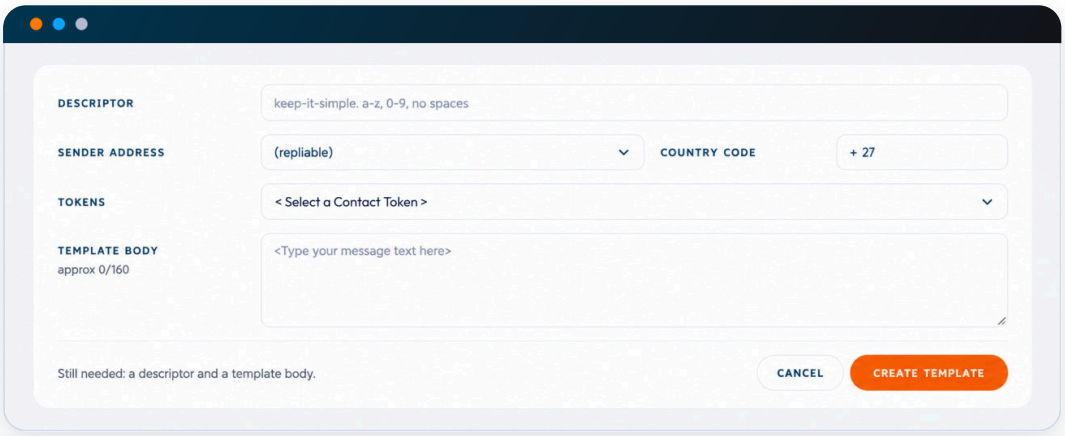


2. Click **Create New Template**.

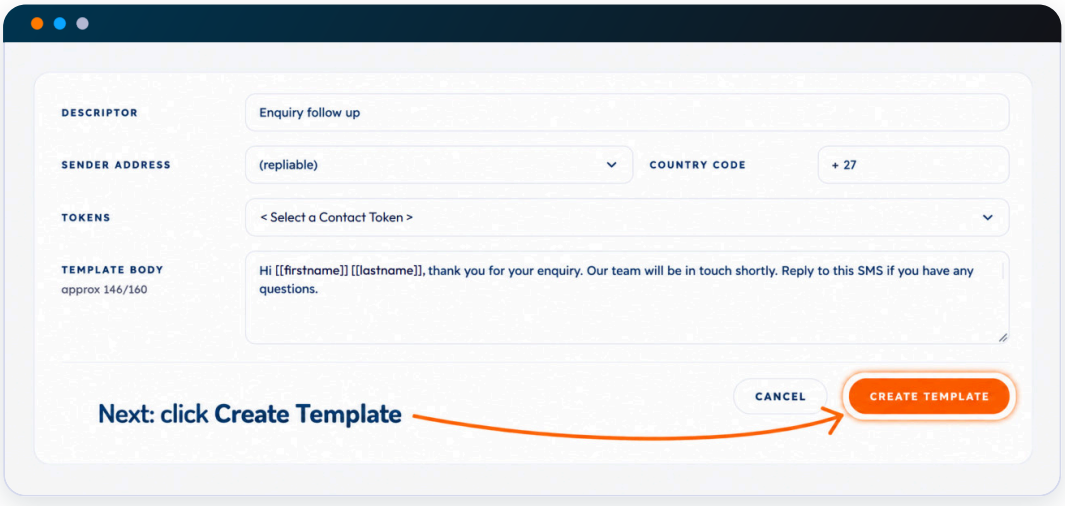


3 Fill in the template:

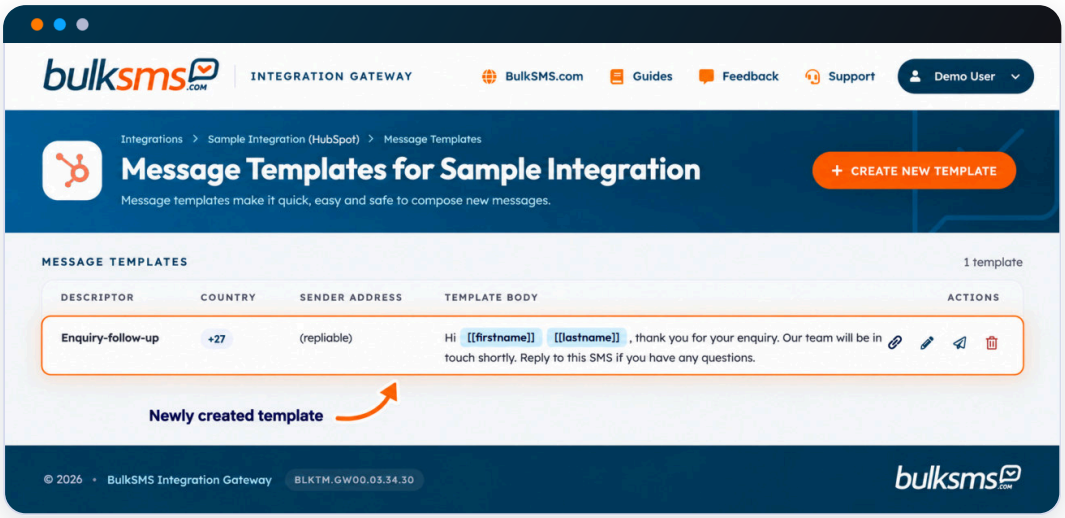
- **Descriptor** – a name for the template, using letters, numbers, spaces and hyphens (up to 30 characters). Spaces are saved as hyphens.
- **Sender Address** – keep **(repliable)** if you want contacts to be able to reply.
- **Country Code** – the default for this template. You can change it when you prepare a message.
- **Tokens** – pick a contact property to insert it into the message. See Sending Tips.
- **Template Body** – your message. The counter shows the approximate length against 160 characters.
- **Default Template** – tick to have this template selected automatically when you prepare a bulk message.



4 When the template is complete, click **Create Template**.



5 Your new template is listed under **Message Templates**. The icons on the right are **webhook info**, **edit**, **prepare a bulk message** and **delete**.

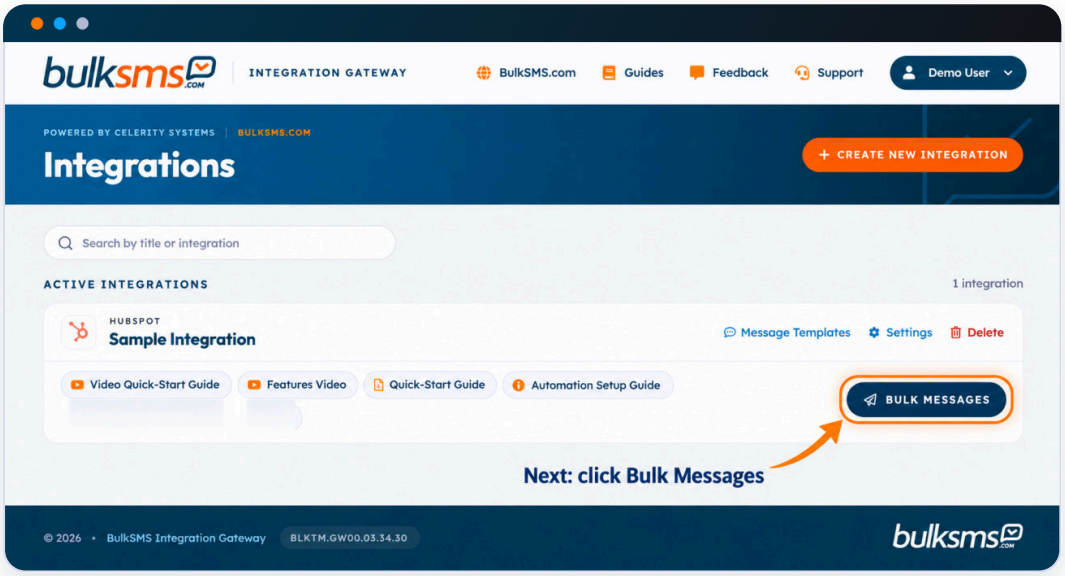


06 Bulk Messaging

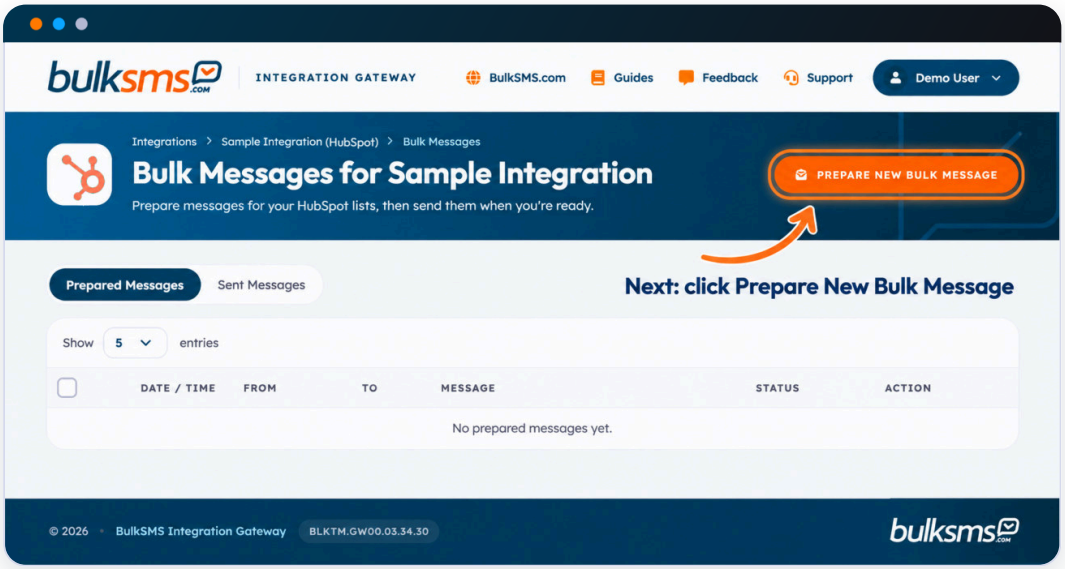
Send an SMS to everyone on a HubSpot list. You prepare the message first, check a sample, then send it.

Prepare the message

1 On the Integrations page, click **Bulk Messages** for your integration.

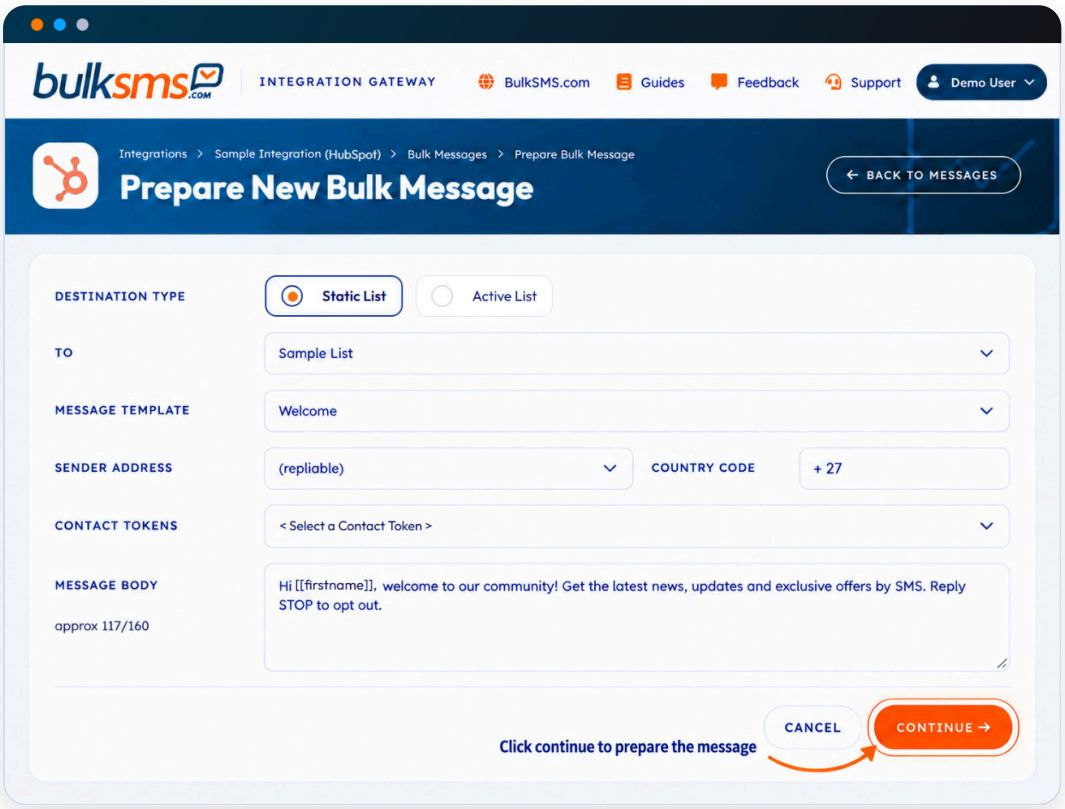


2 Click **Prepare New Bulk Message**.

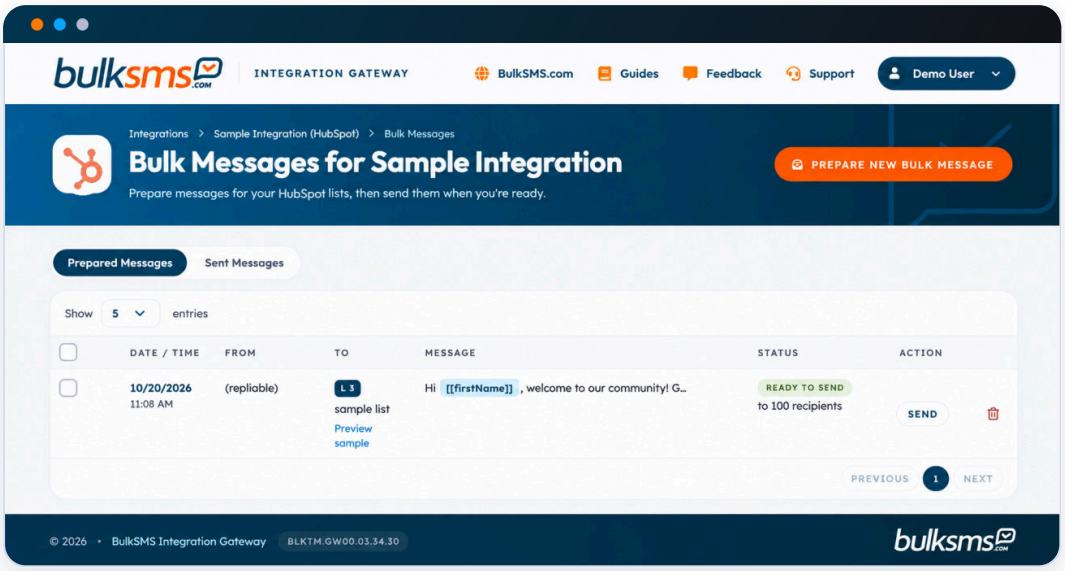


3 Fill in the form, then click **Continue**:

- **Destination Type** – **Static List** or **Active List**, then choose the list under **To**. Type in the search box to find it.
- **Message Template** – optional. Choosing one fills in the message, sender and country code, and you can still edit them.
- **Sender Address** and **Country Code** – as for templates.
- **Contact Tokens** and **Message Body** – write or adjust the message, adding tokens as needed.

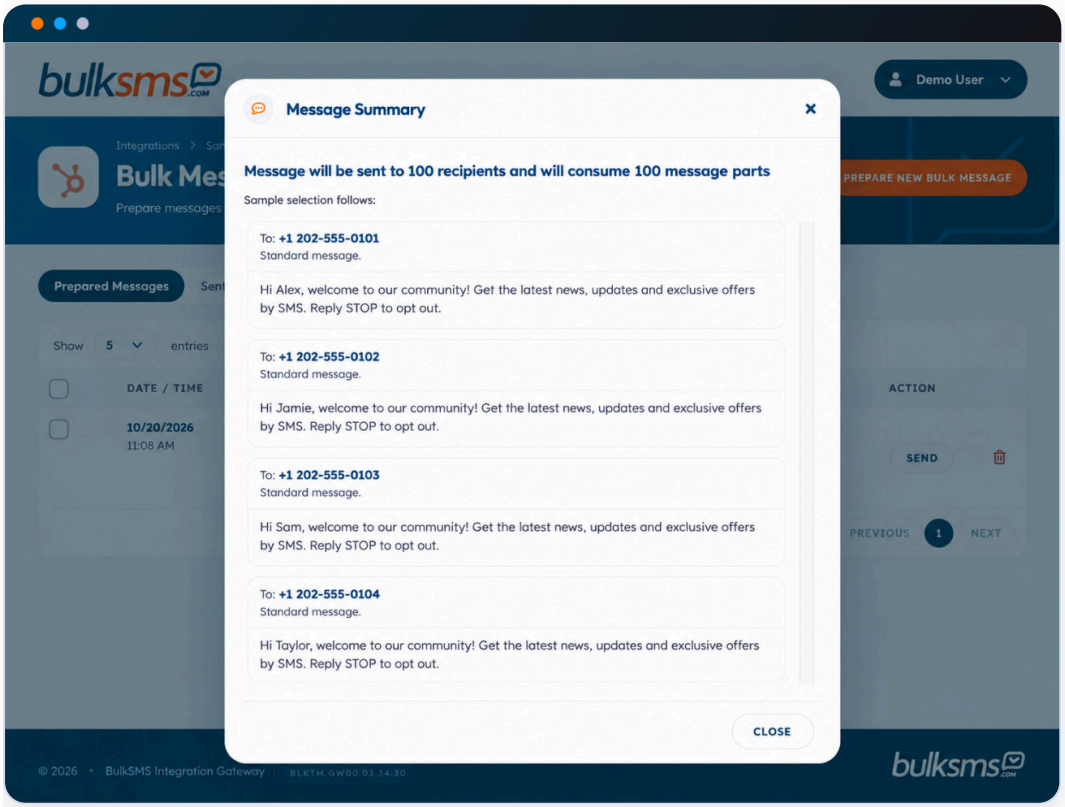


4 The integration collects your contacts and lists the message under **Prepared Messages**. When it shows **Ready to Send** you can preview it, send it, or delete it with the bin icon.

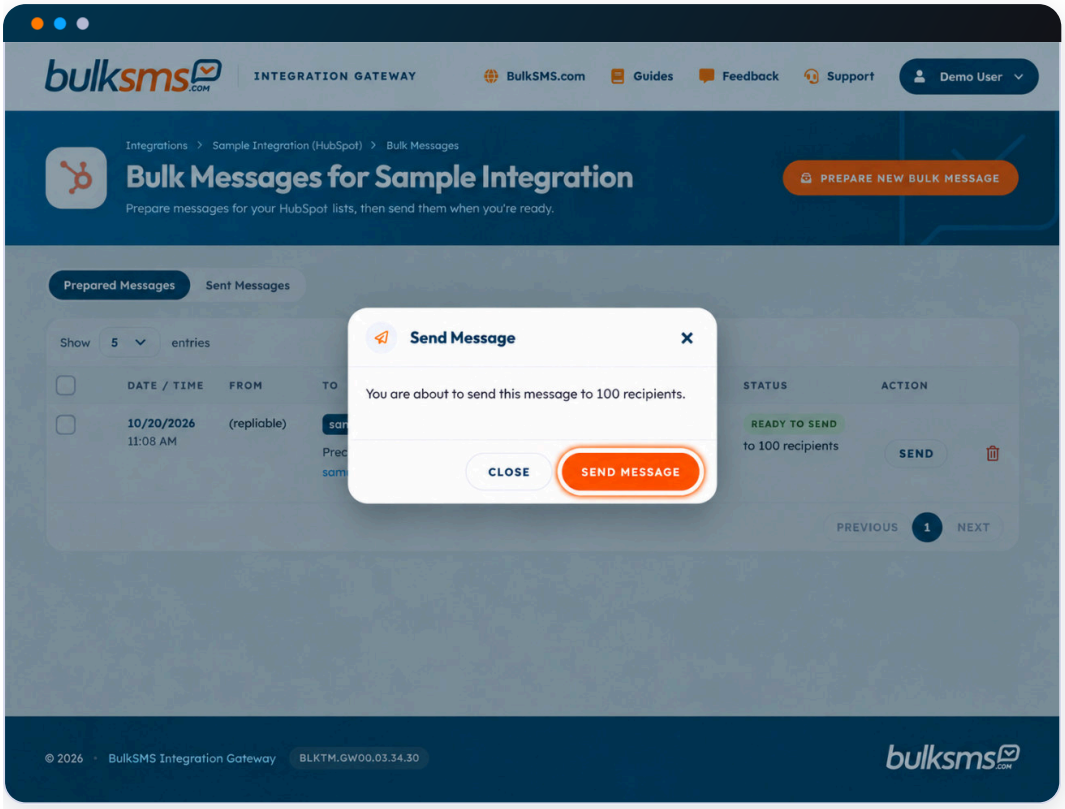


Preview and send

Click **Preview sample** to see how the message looks for a sample of up to 100 contacts, with each contact's tokens filled in. The summary also shows how many recipients and message parts the send will use.

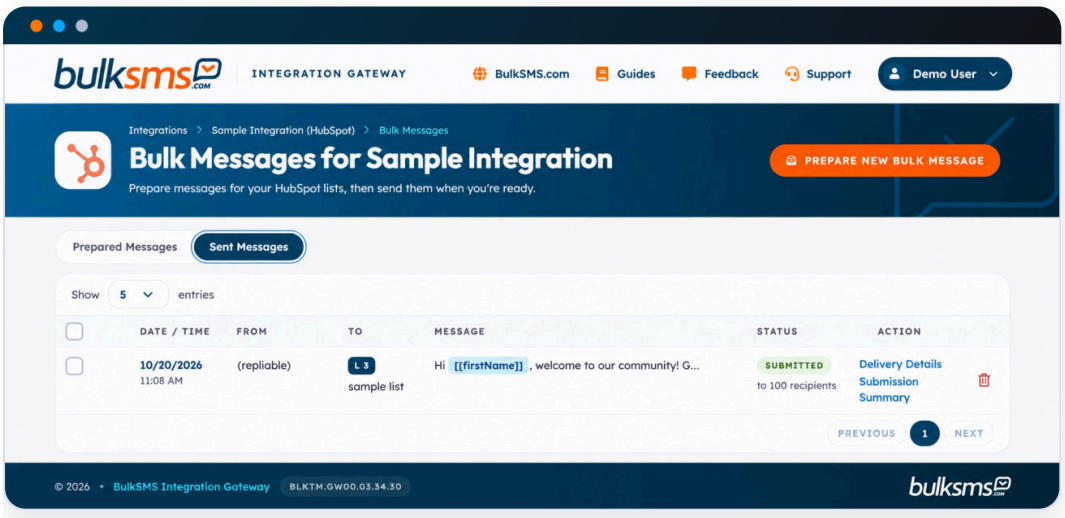


When you're happy, click **Send** and confirm with **Send Message**.



Track your message

Sent messages move to the **Sent Messages** tab. Click **Delivery Details** to see what happened to each message, or **Submission Summary** for totals, including any contacts that were skipped.



07 Sending Tips

Who receives a bulk message

- **Every contact on the list** receives the message—the integration doesn't check HubSpot subscription or opt-out status, so keep your lists clean.
- **Static List** covers HubSpot's manual and snapshot lists; **Active List** covers lists that update automatically. Lists used internally by workflows (names containing "[Workflows]") aren't shown.
- Messages go to the field chosen in **Primary Destination Field** on the Settings page.
- Duplicates aren't removed: two contacts sharing a number will both be messaged.

Phone numbers and country codes

Numbers are sent in international format. If a number in HubSpot doesn't include a country code, the integration adds the country code from the message. **Force Country Code** on the Settings page changes when it is added. With a country code of 44:

NUMBER IN HUBSPOT	FORCE COUNTRY CODE OFF	FORCE COUNTRY CODE ON
`07700900123`	`447700900123`	`447700900123`
`7700900123`	`7700900123` (not valid)	`447700900123`
`12025550143`	`12025550143`	`4412025550143` (wrong)
`+12025550143` or `0012025550143`	`12025550143`	`12025550143`

The safest option is to store numbers in HubSpot with a **+** and the country code (e.g. +44 7700 900123). Only turn on Force Country Code if all your contacts are in one country and their numbers are saved without a country code.

Message length

- One SMS holds up to **160 characters**, or **70** if the message contains Unicode characters such as emoji or some accented letters.
- Longer messages are sent in several parts, and each part uses credits. The Prepare screen shows an approximate character count and a **Long Message** warning with the number of parts.
- A message can't be sent if it reaches 10 parts or more—the **Continue** button stays disabled until you shorten it.

Tokens

HubSpot tokens use the property's internal name, in lower case. Commonly used tokens:

TOKEN	INSERTS	TOKEN	INSERTS
`[[firstname]]`	First Name	`[[company]]`	Company name
`[[lastname]]`	Last Name	`[[jobtitle]]`	Job Title
`[[salutation]]`	Title	`[[mobilephone]]`	Mobile Phone
`[[email]]`	Email Address	`[[website]]`	Website URL

The Tokens list also includes your own **Contacts Custom Fields**. Templates can use **Deals Fields** (e.g. `[[d.dealname]]`) for deal workflows, but deal fields can't be used in bulk messages.

If a contact has no value for a token, they are skipped (First Name and Last Name are simply left blank). Smart token options let you control this:

OPTION	EXAMPLE	EFFECT
`:default=`	`Hi [[firstname:default=there]]`	Uses "there" when the contact has no first name.
`:if(>n)`	`[[firstname:default=friend:if(>10)]]`	Uses the default if the value is longer than 10 characters.
`:if(unicode)`	`[[lastname:default=friend:if(unicode)]]`	Uses the default if the value contains Unicode characters, so the message stays at 160 characters per part.

Sender address

- **(repliable)** – contacts can reply, and replies come back to HubSpot.
- **A phone number** – contacts can reply to that number.
- **A name** (e.g. your brand) – contacts **can't reply**.

! **Opt-outs:** the Integration Gateway doesn't unsubscribe contacts who reply STOP, and bulk messages don't check HubSpot subscription status. Handle opt-outs in HubSpot—for example with a workflow that removes contacts from your SMS lists when they reply "STOP".

08 Troubleshooting

YOU SEE	WHAT TO DO
"You need to first configure your BulkSMS API details."	Click **Configure**, save your BulkSMS API details, then return to the integration and click **Authenticate**.
"There is already an account associated with this Hub Id."	That HubSpot account is connected to another integration (named in the message). Use that integration, or disconnect it there first.
Country Code, Settings and the Save button aren't showing	They appear once you've authenticated. Click **Authenticate** and finish signing in to HubSpot.
"Special characters are not allowed." (Integration Name)	Use only letters, numbers, spaces, hyphens and underscores, up to 40 characters.
Activity Updates is unticked when you return	Tick **Enabled** and click **Save Settings** to set the connection up again.
"Additional scopes required for Conversation features."	Click **Re-Authenticate** and approve the extra permissions.
"This feature requires HubSpot Sales Hub or Service Hub Professional or Enterprise."	HubSpot hasn't given the integration access to conversations. Check your HubSpot subscription, then click **Re-Authenticate**.
Workflow SMS don't appear in the HubSpot Inbox	This is expected when the contact has no open conversation. The SMS is recorded on the contact's timeline, and a conversation starts when the contact replies.
"Deal fields cannot be used for Bulk Messages."	Remove deal tokens (`[[d.…]]`) from the template you're sending, or use it in a deal workflow instead.
Contacts skipped: "configured phone field is blank."	The contact has no number in the Primary Destination Field. Add one in HubSpot, or choose **Auto** on the Settings page.
Contacts skipped: "Invalid Mobile Number …" or "Invalid country code"	The number isn't valid once the country code is applied. See Phone numbers and country codes.
Contacts skipped: "Missing data for … token."	The contact has no value for a token in your message. Add a default, e.g. `[[company:default=your company]]` .
"Message contains the following invalid token: …"	Check the token's spelling and square brackets, or choose it from the Contact Tokens list.
Continue is greyed out	Choose a destination and list, and check the message is under 10 parts.

You can download the list of skipped contacts, with the reason for each, from the Prepared Messages table.

Questions

We're here to help you every step of the way.

Please email **support@bulksms.com** or visit **www.bulksms.com** for other contact options.

Please be sure to mention **your username** and that you are using the **Integration Gateway for a HubSpot integration**.

EMAIL SUPPORT

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