Glare

INSTALLATION & USER GUIDE

SMSIt!

Seamless SMS for HubSpot

Send, automate and track text messages without leaving HubSpot.

SMSit!

www.glaremarketing.co

2 Ha'sahlav St., Ra'anana, Israel

SMSIt! Integration Overview

SMSIt! gives you native text messaging inside HubSpot, from workflows or directly from the contact record, with every message logged on the timeline.

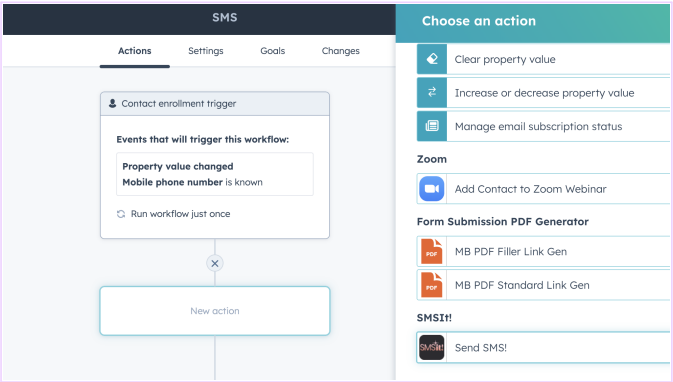
With SMSIt! you can:

- Send automated messages through contact-based workflows
- Send a direct SMS to a specific contact from the contact record
- Track every message on the HubSpot contact timeline
- Send SMS internationally

Integration Features

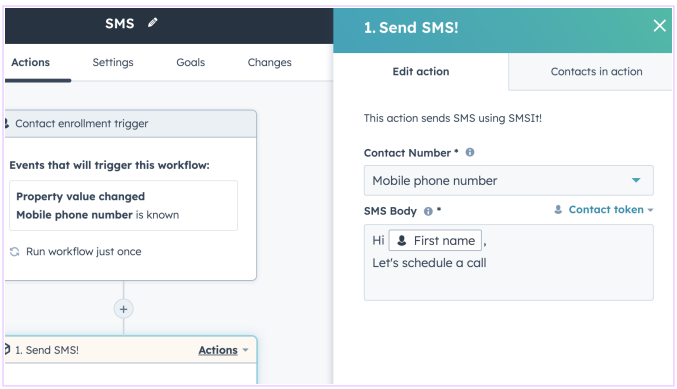
Contact-based SMS workflows

Support your marketing and sales efforts with contact-based SMS workflows.



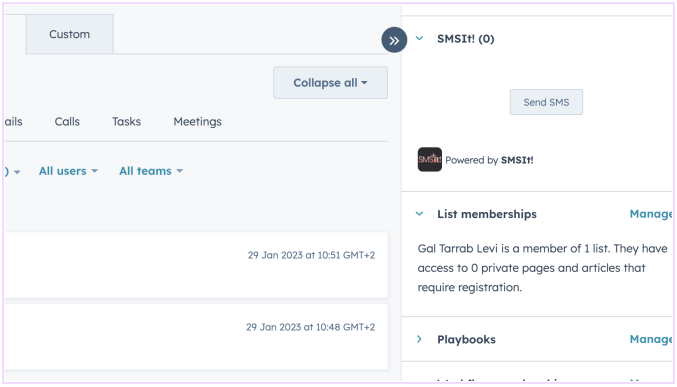
Personalised automated messages

Personalise each message by adding contact tokens, such as first name, to the text.



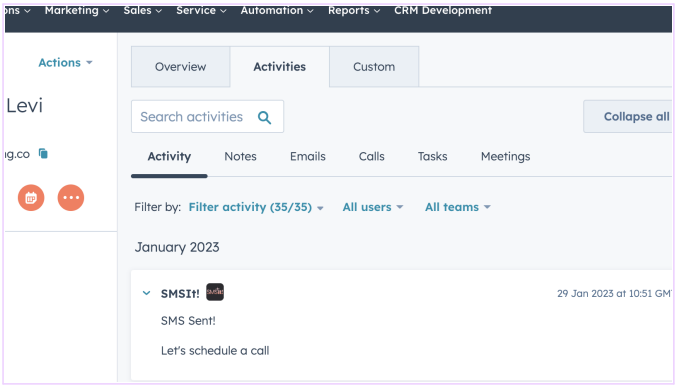
Direct SMS from the contact record

Send one-to-one SMS messages directly from the contact record.



Activity tracking

Track SMS messages on the contact timeline, or view recently sent messages on the contact profile for complete oversight.



Installation Steps

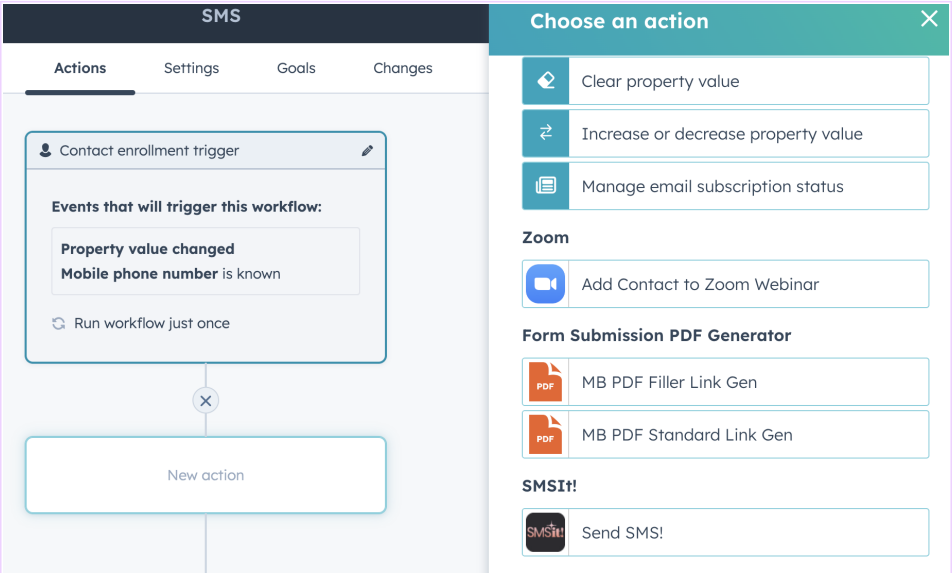
1. Before installing the app, you need to sign a contract with the SMS service provider, who will give you the best rates. Email us at karin@glaremarketing.co and we will forward your details to them so they can contact you.
2. After signing the contract, the provider will send you a username and a token. Please send these to karin@glaremarketing.co.
3. Now you can install SMSIt! Open the app in the HubSpot Marketplace and click **Install**.

That's it. You can now start sending SMS messages.

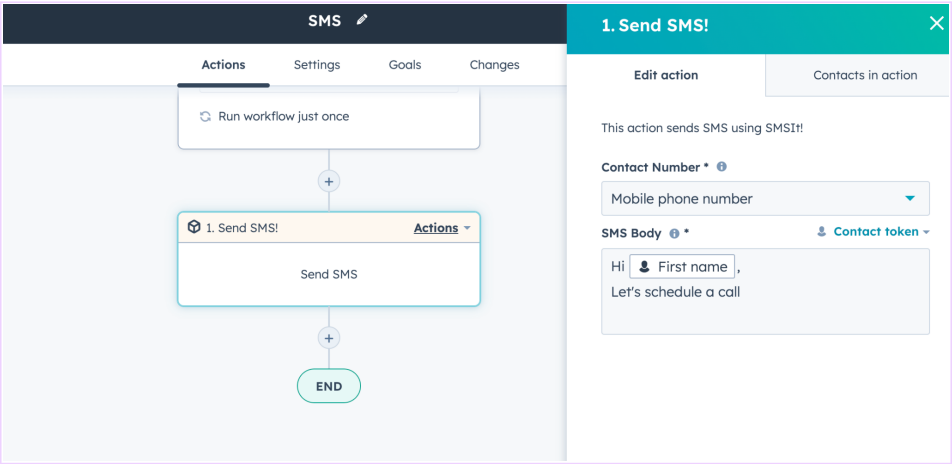
Usage

Sending SMS using a workflow

- In your HubSpot account, go to **Automation › Workflows** and create a new contact-based workflow.
- Define the enrollment trigger.
- Click the **+** sign and choose the action **SMSIt! › Send SMS!**



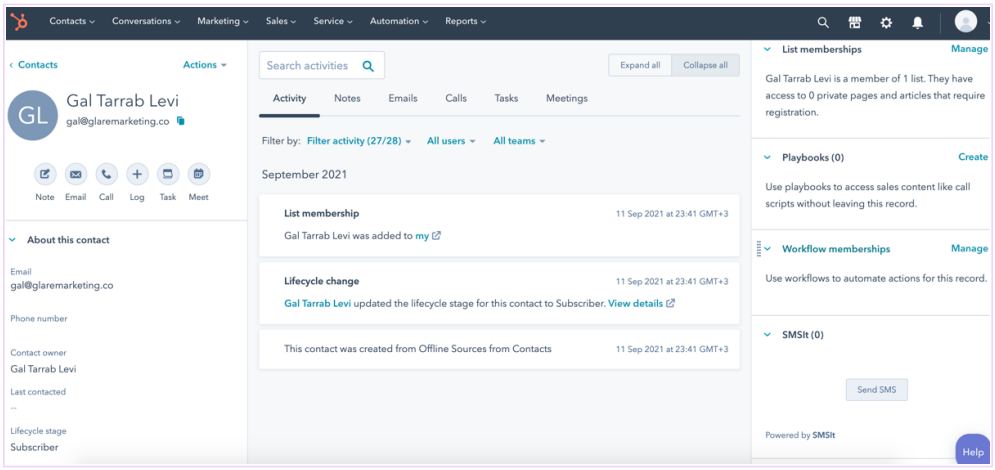
- In **Contact Number**, choose **Mobile phone number**, then write the message in the text box.



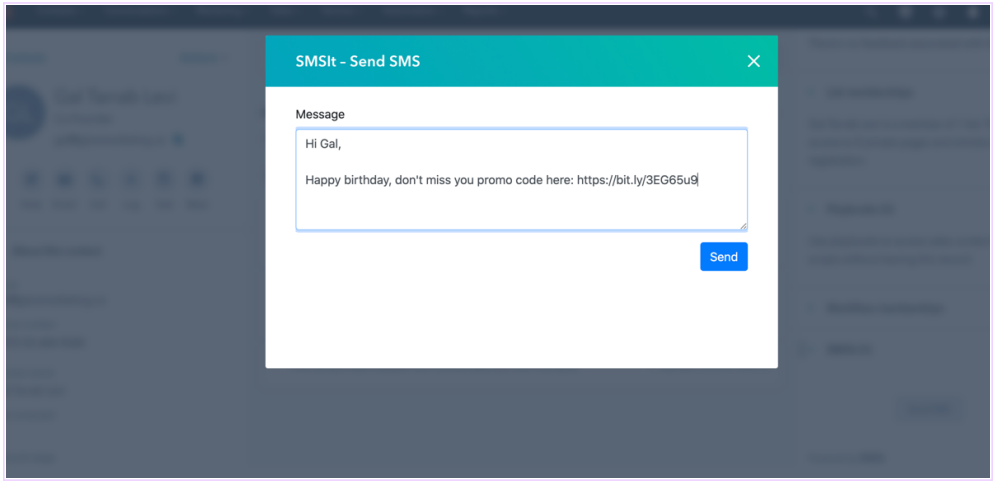
- Review and publish the workflow.

Sending SMS from the contact record

- Open a contact record.



- Click the **Send SMS** button in the right-hand sidebar.



- Write your text and click **Send**.