



Case Study

Integration of UCaaS into HubSpot CRM Platform

A leading UCaaS provider aimed to enhance their services for CRM users by integrating their platform with HubSpot CRM. SpringCT was uniquely positioned to fulfill this need given its extensive experience in developing plugins for all major CRM platforms. SpringCT developed a public application for HubSpot CRM, specifically tailored for a leading UCaaS provider. Available on the HubSpot marketplace, the app enhances the HubSpot CRM user experience by seamlessly integrating advanced features such as calling, messaging, and contact management.

Product Features

• Calls / Voicemails

CRM users can seamlessly initiate calls or voicemails to contacts using the underlying UCaaS calling platform. The integration is so smooth that users won't notice any difference in their calling tasks. The UCaaS platform provides detailed usage statistics, including call details, call duration, date, and time.

• Conversation Threads

Leveraging the UCaaS provider's SMS messaging capabilities, SpringCT has built a conversation threads feature in the CRM. Messages sent from the CRM are delivered as short or long text messages to customers. SMS usage is tracked on the UCaaS platform.

• Bidirectional Contact Sync

SpringCT implemented bidirectional contact synchronization, allowing CRM contacts to be available in the UCaaS account and vice versa, eliminating the need for users to manually create contacts in both systems.

Key Technical Achievements

• Preserved CRM User Experience

Keeping the CRM user interface unchanged while replacing the calling mechanism with the UCaaS platform.

• Real-Time Synchronization

Efficiently managing synchronization of real-time activities such as syncing call logs, placing calls, and supporting bidirectional contact sync.

• Duplicate Contact Handling

Implemented deduplication logic to keep contacts consistent and manageable across both systems.

Technologies Used

- **Node.js:** Middleware server platform.
- **HubSpot Webhooks:** For real-time contact events coming from HubSpot.
- **Pusher:** For real-time contact events coming from the UCaaS server.
- **MySQL:** Storage for middleware server data.
- **React.js:** Web UI for the application.
- **OAuth:** User authentication for installing the app on HubSpot.

Results

- The system allowed users to initiate calls from HubSpot CRM using the UCaaS platform.
- Users could send SMS messages from HubSpot CRM using the UCaaS platform.
- Bidirectional contact synchronization was established between HubSpot CRM and the UCaaS platform.
- Activity synchronization provided users with a centralized communication history.

Conclusion

SpringCT successfully delivered the plugin for HubSpot CRM that supported features like calling, sending SMS, contacts and activity synchronization, and real-time events handling utilizing the UCaaS platform.