

Sola Salon Studios - SalesMsg HubSpot Integration, Navigation Access

SalesMsg is integrated with HubSpot, syncing contacts and deals. This guide will walk you through how to access SalesMsg through HubSpot, important settings to configure, and important items within the application you'll want to make note of including:

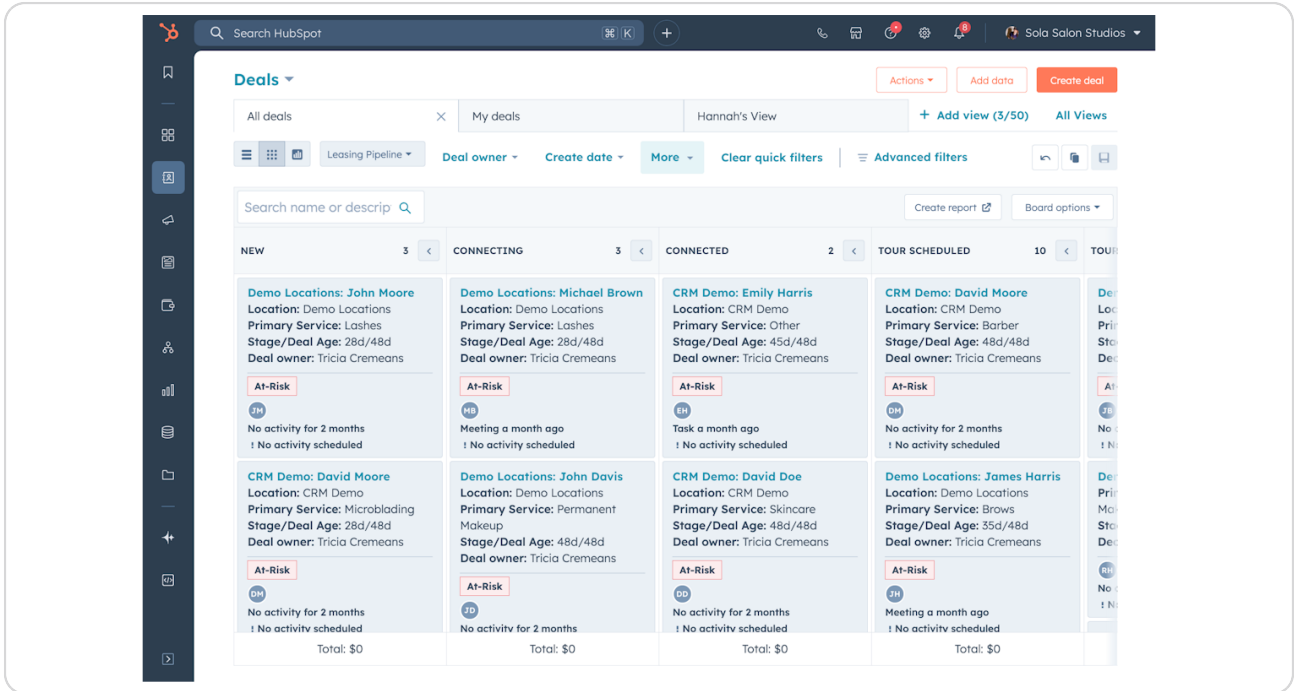
- Favoriting Key Locations
- Viewing Message History
- Saved Replies Setup

25 Steps [View most recent version](#) 

Created by	Creation Date	Last Updated
Doug Davidoff	Feb 27, 2025	Mar 10, 2025

STEP 1

Navigate to Deals



STEP 2

Click on a Deal

Search name or descrip

NEW 3	CONNECTING 3	CONNECTED
Demo Locations: John Moore Location: Demo Locations Primary Service: Lashes Stage/Deal Age: 28d/48d Deal owner: Tricia Cremeans At-Risk JM No activity for 2 months ! No activity scheduled	Demo Locations: Michael Brown Location: Demo Locations Primary Service: Lashes Stage/Deal Age: 28d/48d Deal owner: Tricia Cremeans At-Risk MB Meeting a month ago ! No activity scheduled	CRM Demo Location: CRM Demo Primary Service: Lashes Stage/Deal Age: 28d/48d Deal owner: Tricia Cremeans At-Risk EH Task a month ago ! No activity scheduled
CRM Demo: David Moore Location: CRM Demo Primary Service: Microblading Stage/Deal Age: 28d/48d Deal owner: Tricia Cremeans	Demo Locations: John Davis Location: Demo Locations Primary Service: Permanent Makeup Stage/Deal Age: 48d/48d Deal owner: Tricia Cremeans	CRM Demo Location: CRM Demo Primary Service: Lashes Stage/Deal Age: 28d/48d Deal owner: Tricia Cremeans

STEP 3

Click on View record

Locations

More

Schedule Now

Cancel **View record**

STEP 4

SalesMsg will appear on the right-hand side of the record

The screenshot shows a CRM record interface. On the left, there are fields for 'EAL STATUS' (Open) and 'REATE DATE' (12:04 PM HST (48 d...)). On the right, there is a section titled 'View associated Location' which contains a dropdown menu for 'Salesmsg SMS (0)'. Below this dropdown is a 'Send SMS' button. Further down, there is a logo for 'Salesmsg SMS Texting & Calling' and a 'Settings' link. Below this section is another dropdown menu for 'Contact's Recent Deals'.

STEP 5

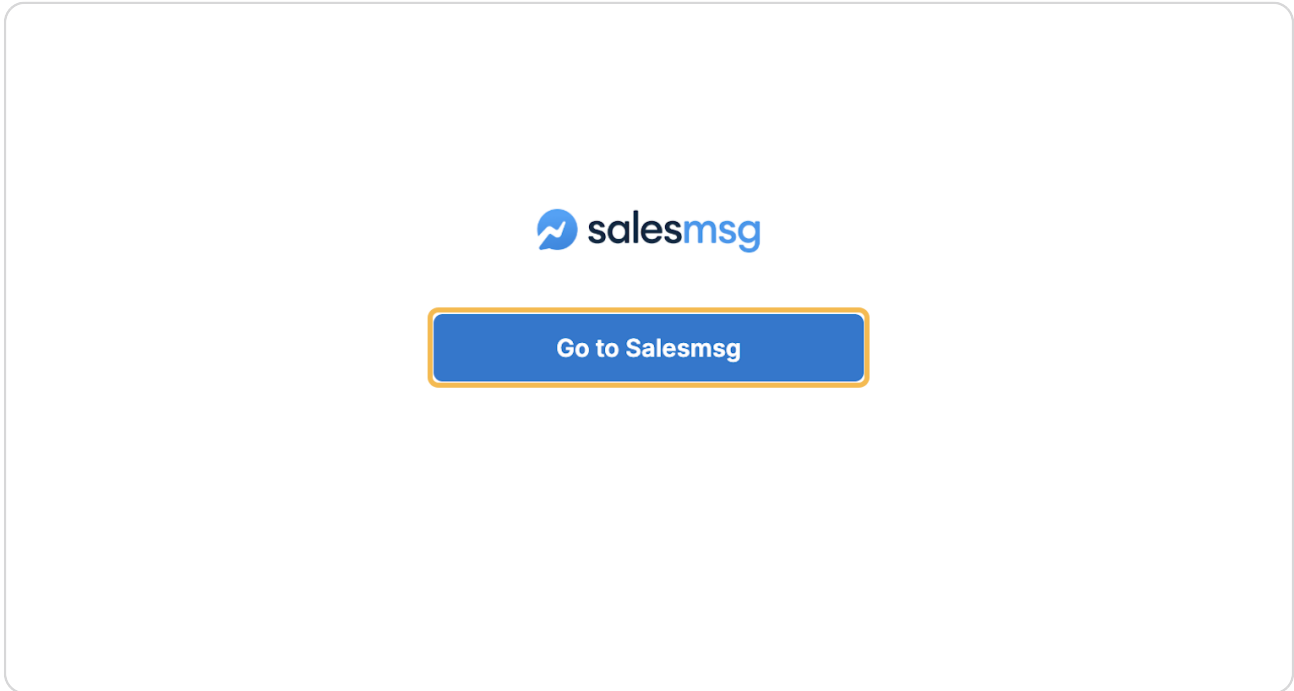
Click on Settings

This is a close-up view of the 'Salesmsg SMS Texting & Calling' section. It features a 'Send SMS' button at the top. Below it is the text 'Powered by Salesmsg SMS Texting & Calling' next to a logo. To the right of this text is a 'Settings' link, which is highlighted with an orange box. Below this section is a dropdown menu for 'Contact's Recent Deals'.

STEP 6

Click on Go to Salesmsg

If you are not already logged into SalesMsg, you will need to log in.



SalesMsg

1 Step

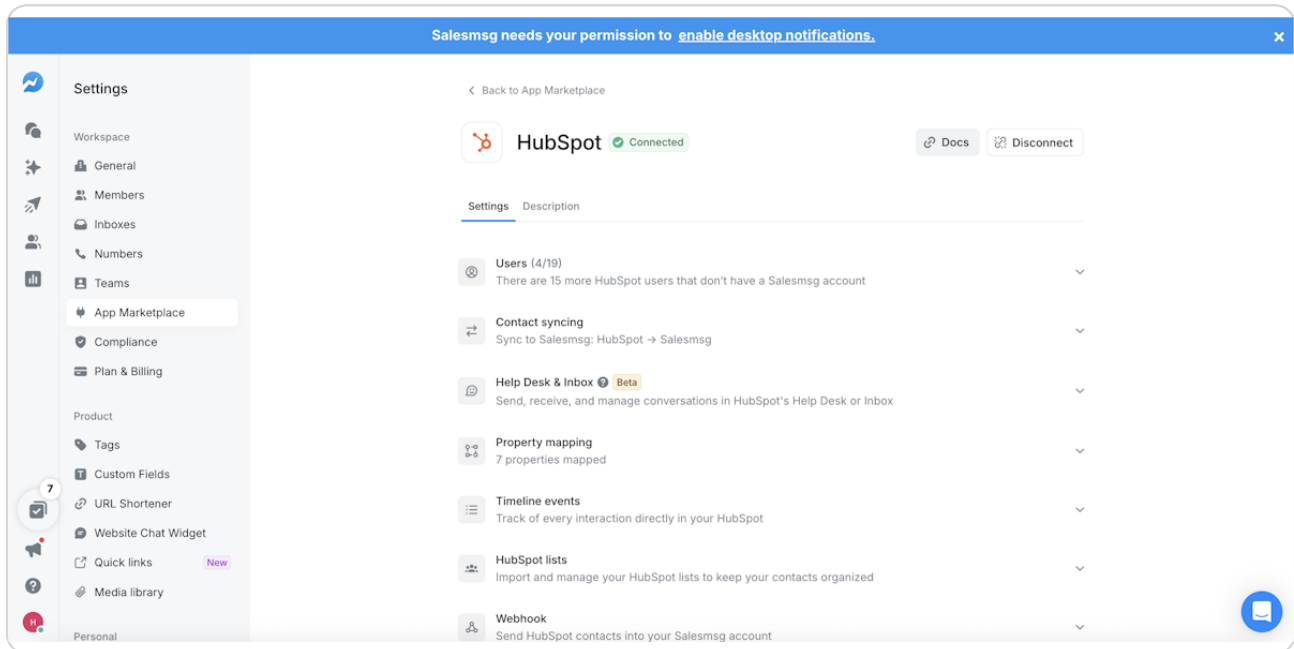
A few things to note:

- Contact updates **must** be made in HubSpot. Changes in SalesMsg do not sync back.

STEP 7

This will bring you into the settings of SalesMsg

Note: Don't worry about anything here, you can continue to navigate through the platform. This is just one way that you can gain access to the tool. The other is by going to SalesMsg directly and signing in.



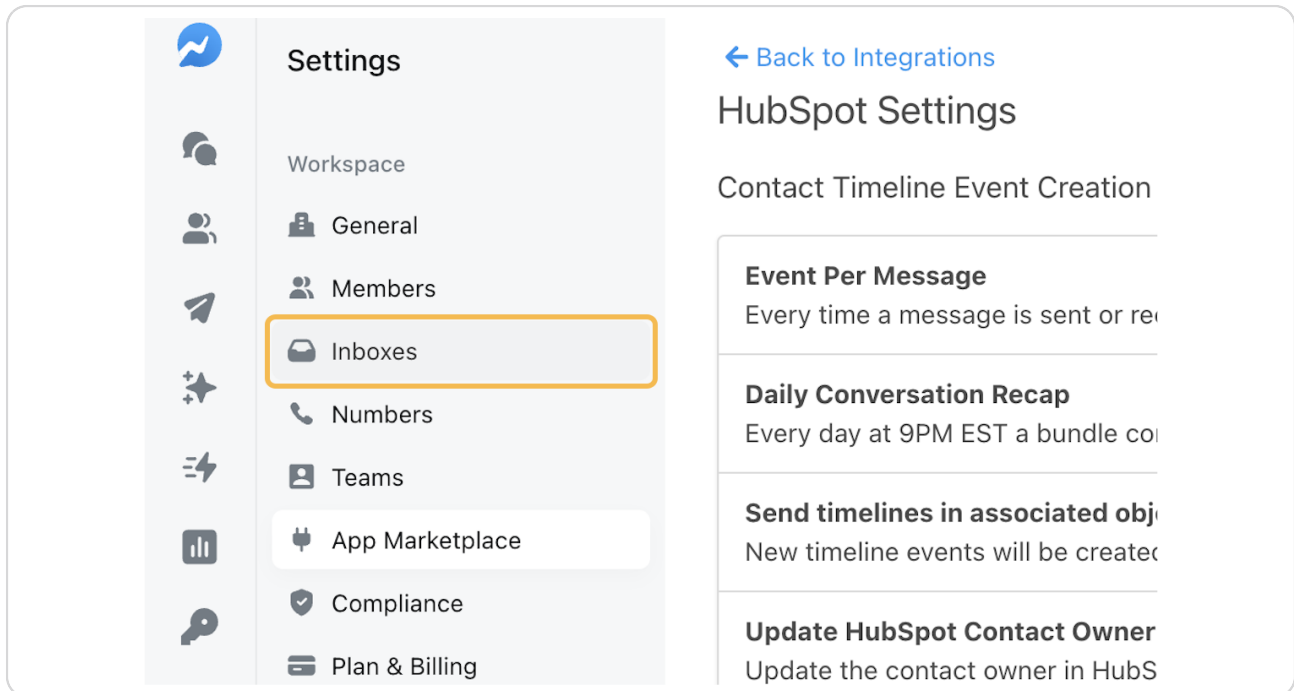
Inboxes

4 Steps

Leasing managers and facility managers have separate inboxes for deals and tickets.

STEP 8

Click on Inboxes



The screenshot displays the HubSpot Settings interface. On the left is a navigation sidebar with various icons and menu items. The 'Inboxes' item is highlighted with a yellow rectangular border. The main content area on the right shows the 'HubSpot Settings' page, specifically the 'Contact Timeline Event Creation' section. This section includes a 'Back to Integrations' link and three settings cards: 'Event Per Message', 'Daily Conversation Recap', and 'Update HubSpot Contact Owner'.

Settings

- Workspace
 - General
 - Members
 - Inboxes**
 - Numbers
 - Teams
- App Marketplace
- Compliance
- Plan & Billing

[← Back to Integrations](#)

HubSpot Settings

Contact Timeline Event Creation

Event Per Message
Every time a message is sent or received

Daily Conversation Recap
Every day at 9PM EST a bundle of conversations is generated

Send timelines in associated object
New timeline events will be created for associated objects

Update HubSpot Contact Owner
Update the contact owner in HubSpot

STEP 9



Here you will see your Inboxes

Note: Most people will only have one inbox. This is useful if you have more than one inbox.

Salesmsg needs your permission to [enable desktop notifications.](#) ✕

Inboxes [New Inbox](#)

[All Inboxes](#) [Group Inboxes](#)

NAME	OWNER	MEMBERS	PHONE NUMBER	CREATED AT
 UAT Franchise B - Leasing	UAT Franchise B - Owner	2	(720) 649-5900	26 Oct, 2024 - 1:25 AM
 UAT Franchise B - Facility	UAT Franchise B - Owner	2	(720) 815-9674	31 Oct, 2024 - 12:13 PM ⋮

STEP 10

To set a Default Inbox, Click on the 3 dots next to the Inbox

S	PHONE NUMBER	CREATED AT	
	(720) 649-5900	26 Oct, 2024 - 1:25 AM	
	(720) 815-9674	31 Oct, 2024 - 12:13 PM	⋮

STEP 11

Click Make Default

	(720) 649-5900	26 Oct, 2024 - 1:25 AM	
	(720) 815-9674	31 Oct, 2024 - 12:13 PM	⋮

◀ Make Default

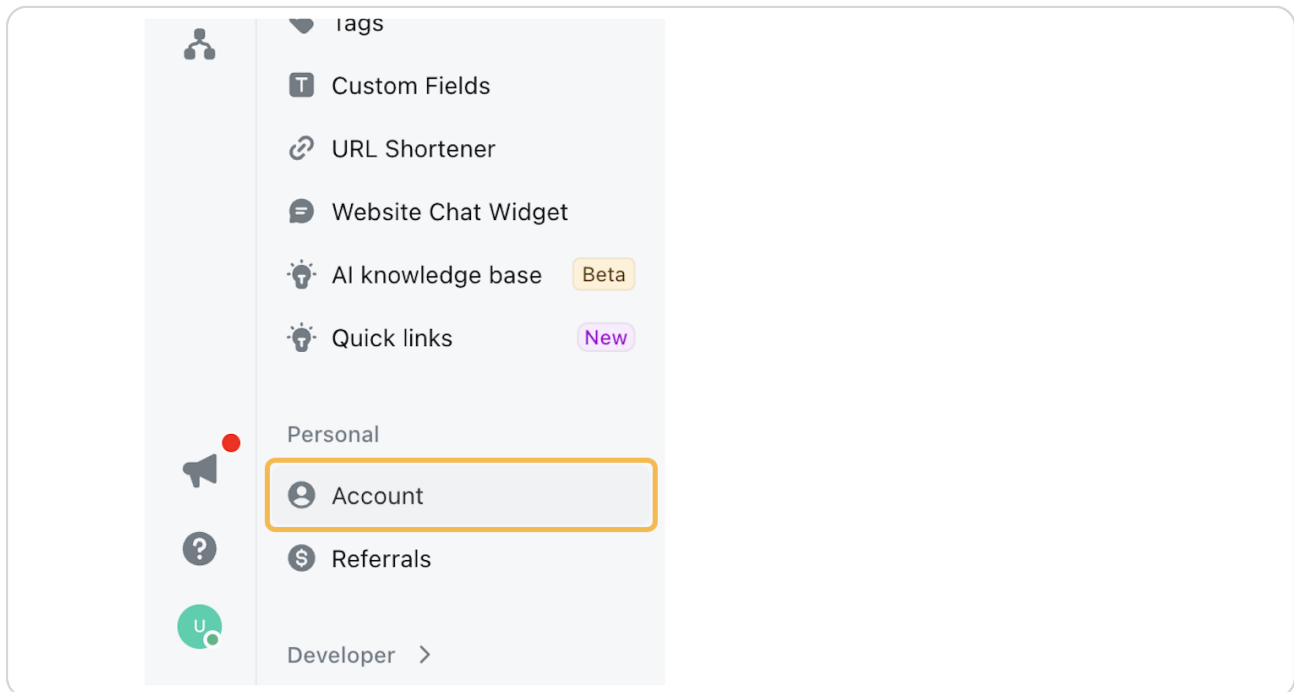
Update Notifications

3 Steps

You will want to configure your notifications on the desktop to reduce inbox clutter.

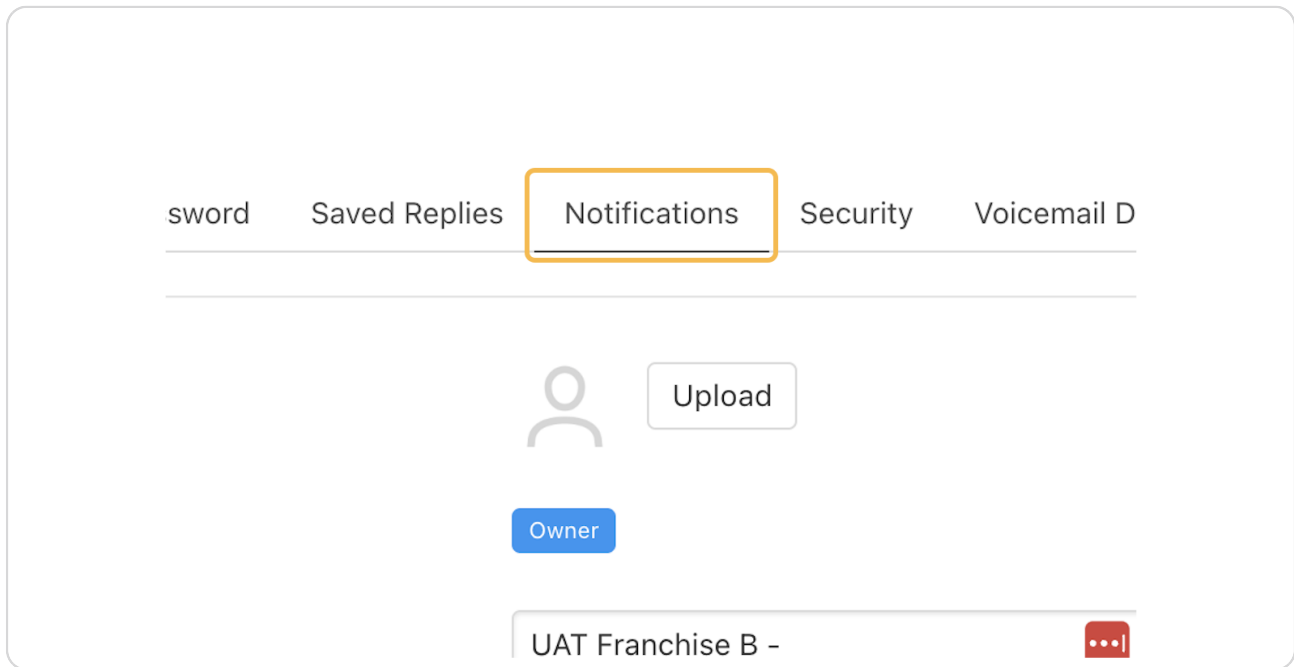
STEP 12

Click on Account within Settings



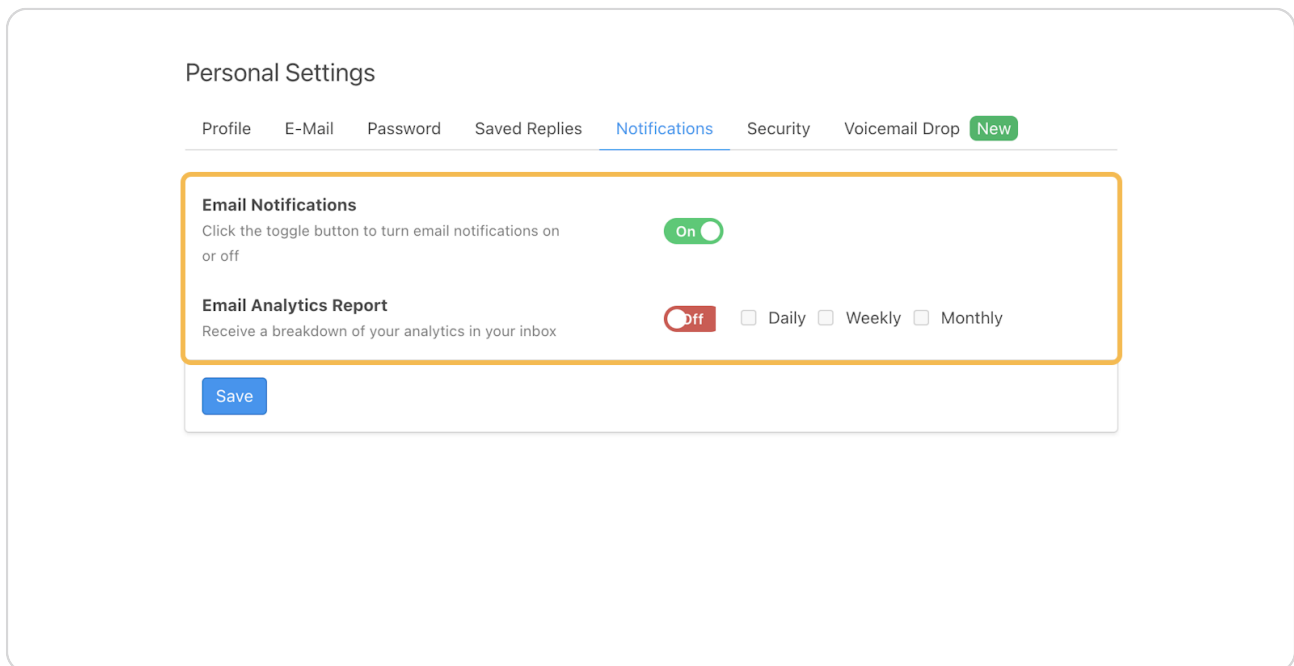
STEP 13

Click on Notifications



STEP 14

Here you can update your notifications for Email and Analytics Reports

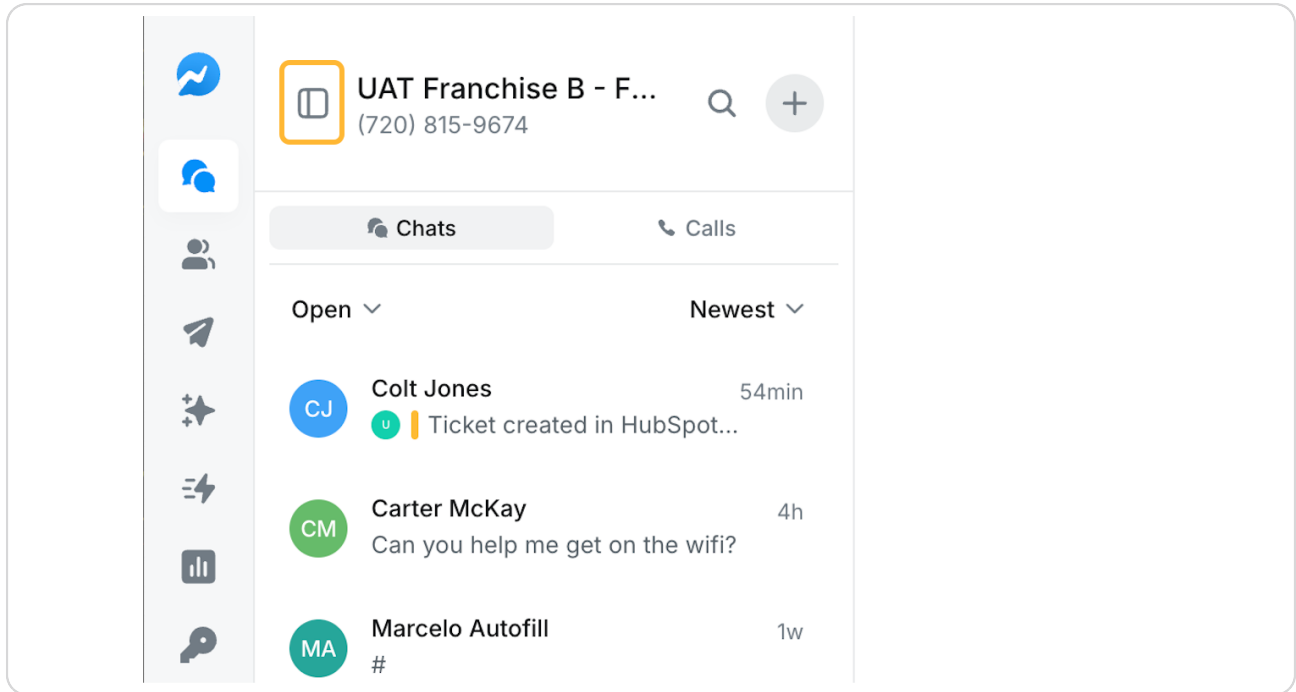


Favoriting Key Locations

4 Steps

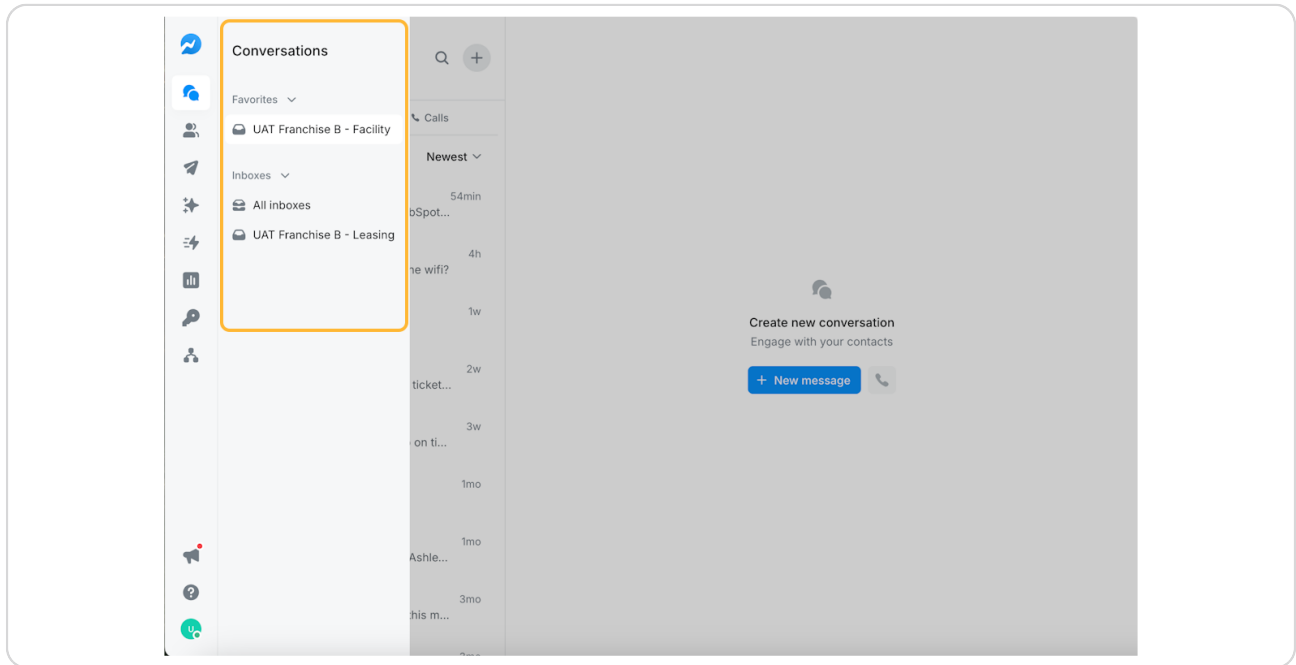
STEP 15

Within Conversations or Contacts, Click to open the Menu (if not already opened)



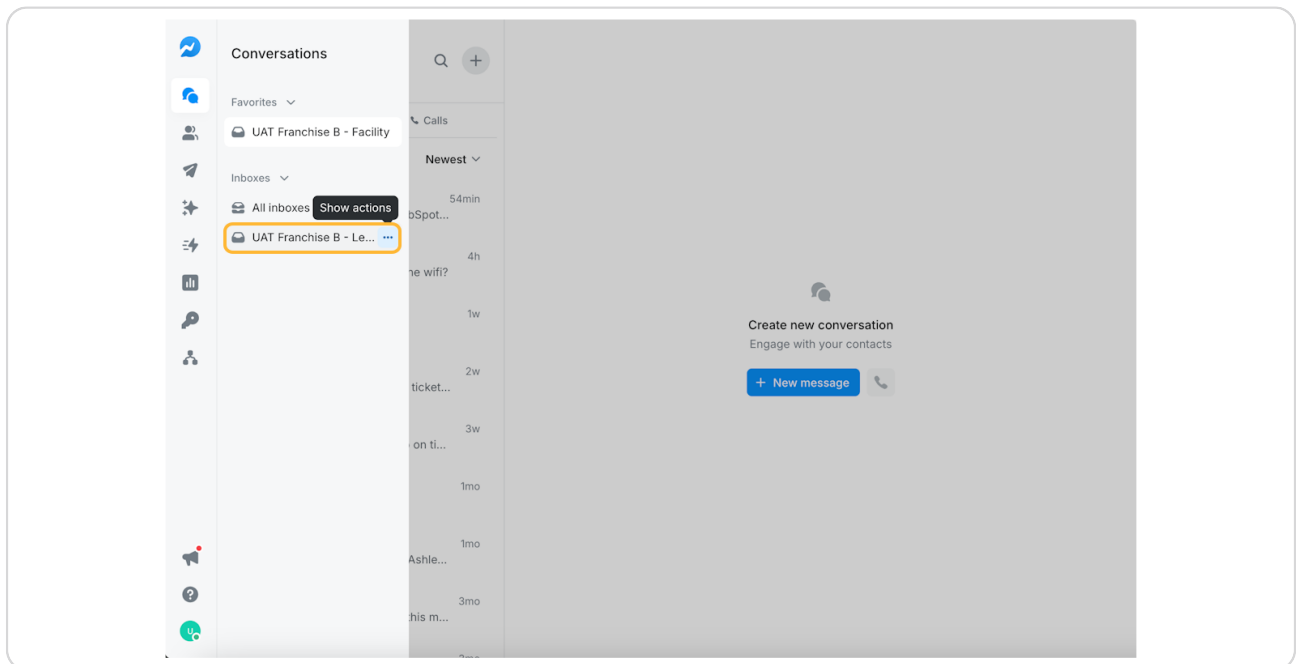
STEP 16

The Menu will Open



STEP 17

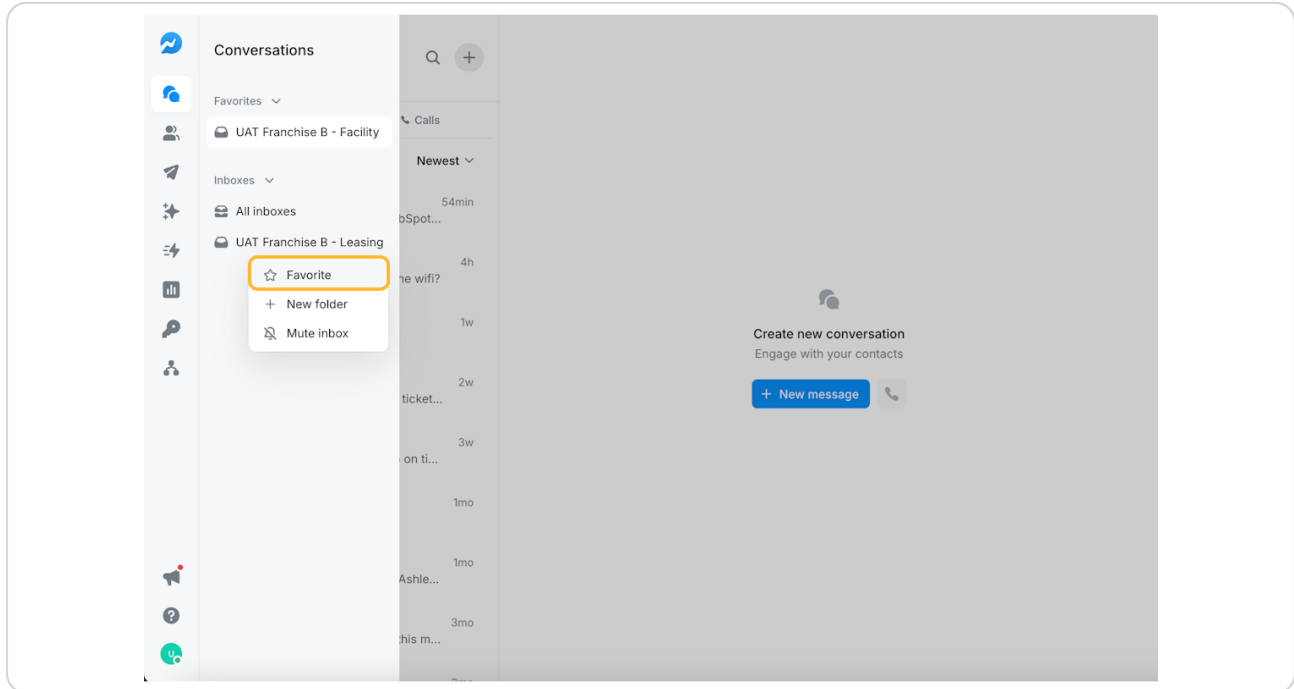
Hover over the location you want to favorite and Click on the 3 dots



STEP 18

Click Favorite

Your Favorites will show up first before the rest of the items in the Menu.

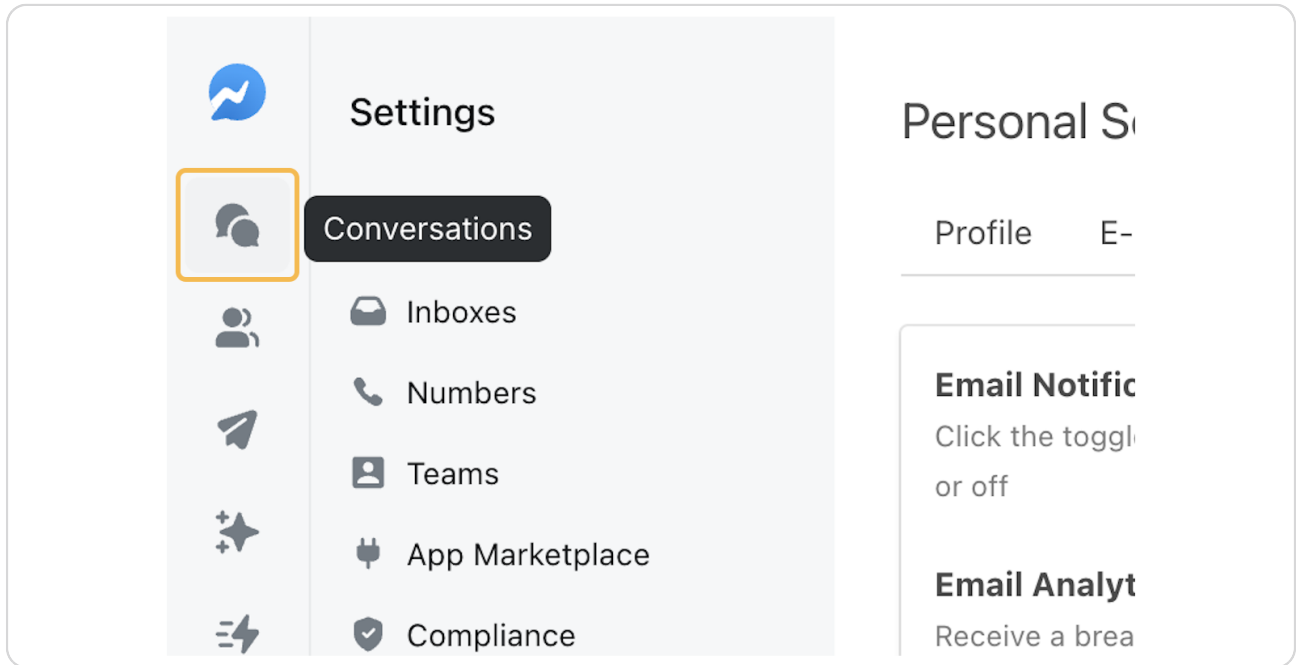


Viewing Message History

3 Steps

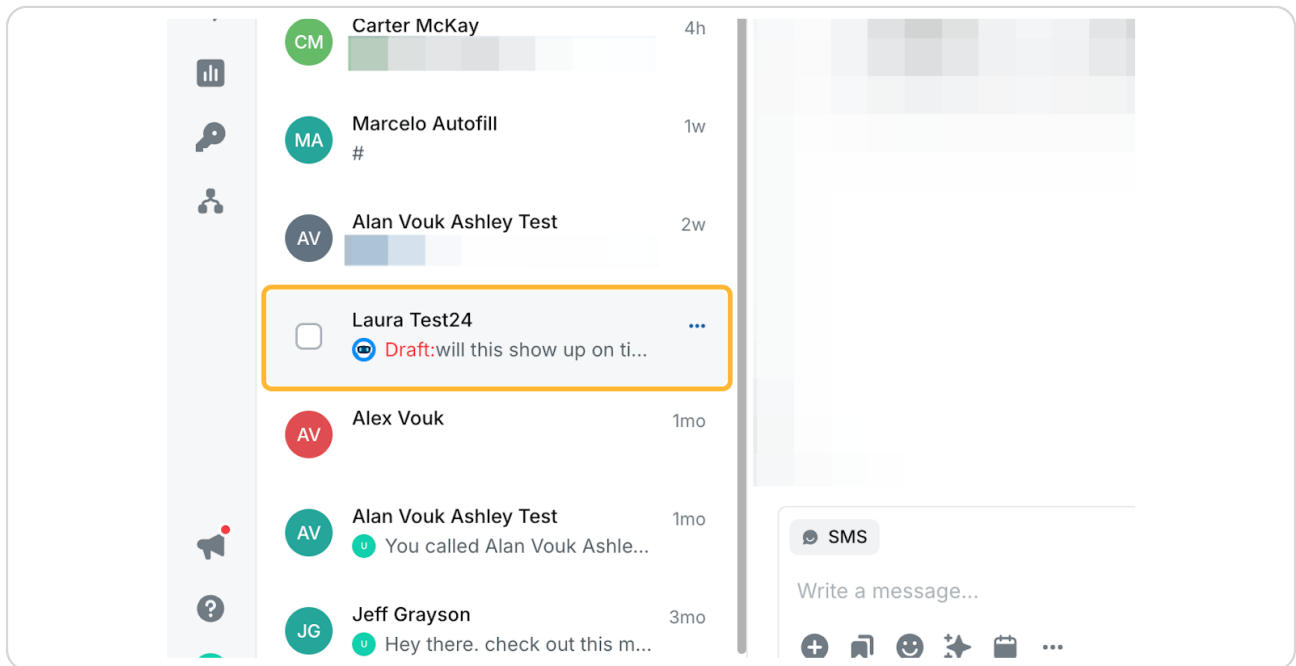
STEP 19

Click on Conversations



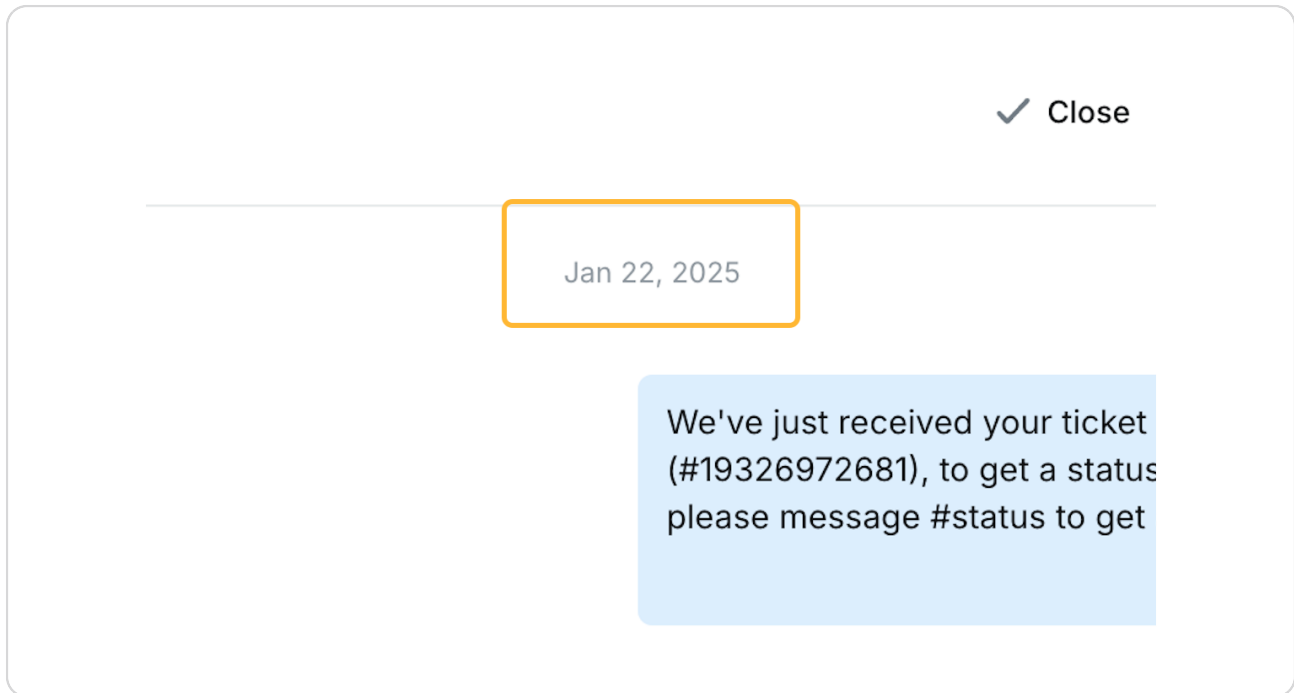
STEP 20

Click on a Conversation



STEP 21

You'll be able to scroll and see message history

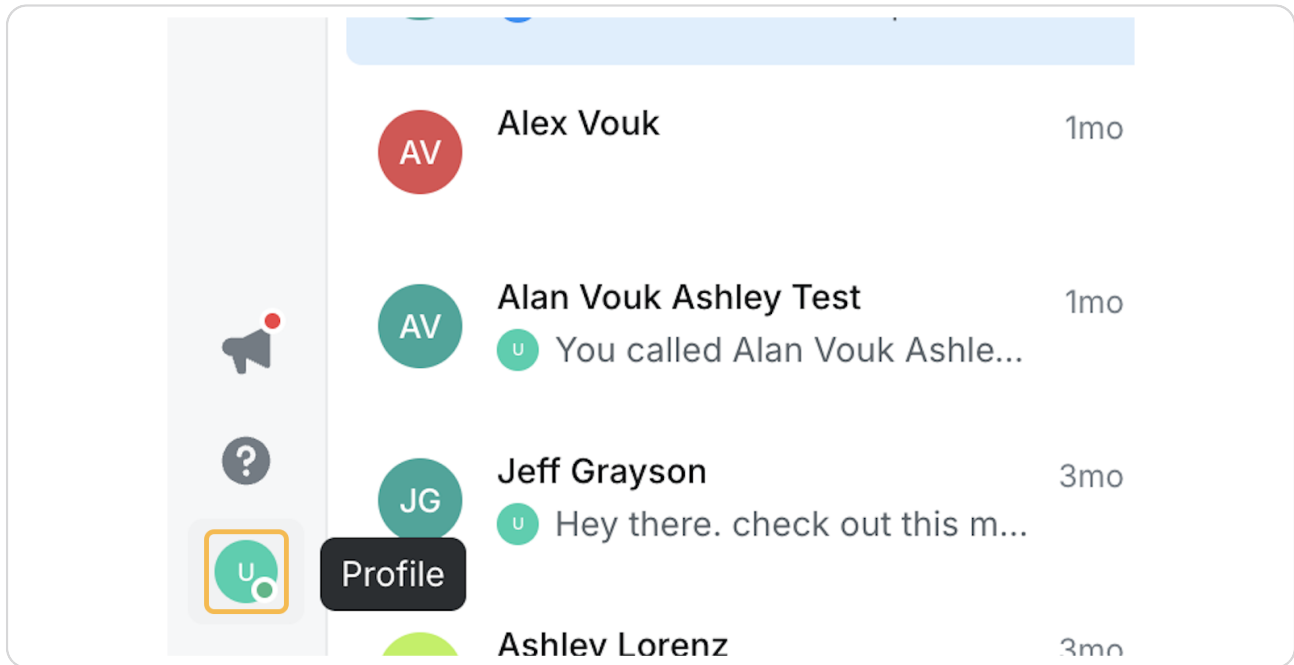


Saved Replies Setup

4 Steps

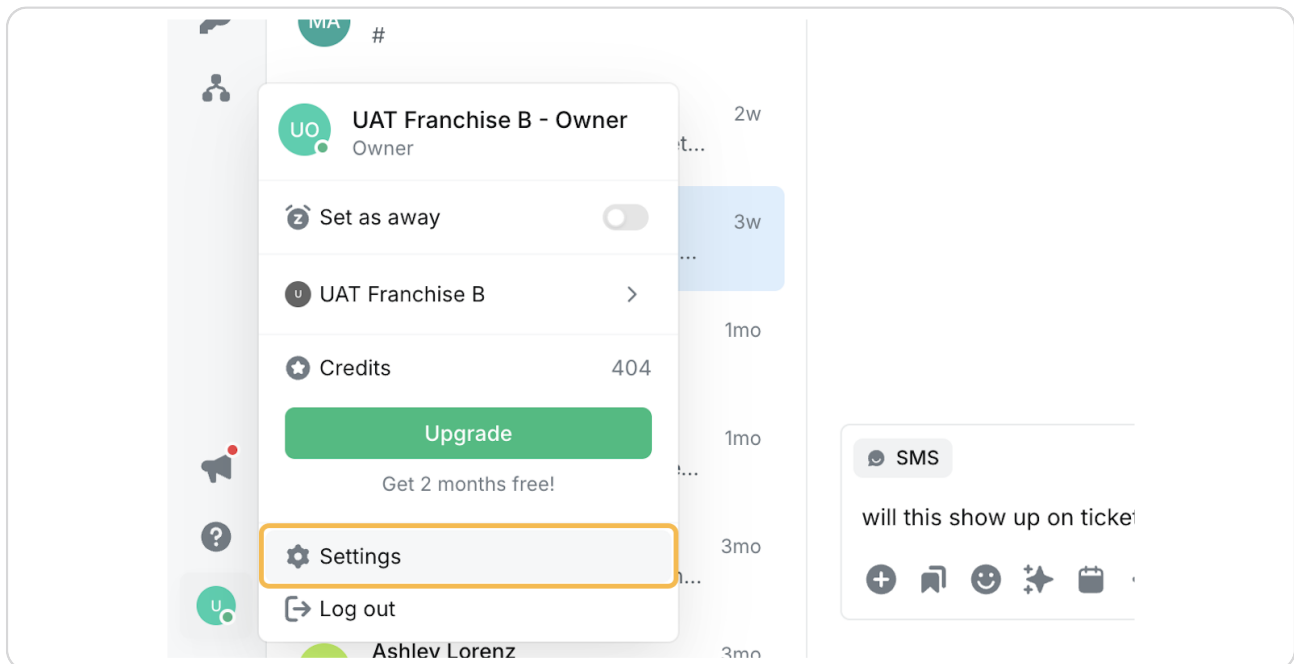
STEP 22

Click on Your Profile



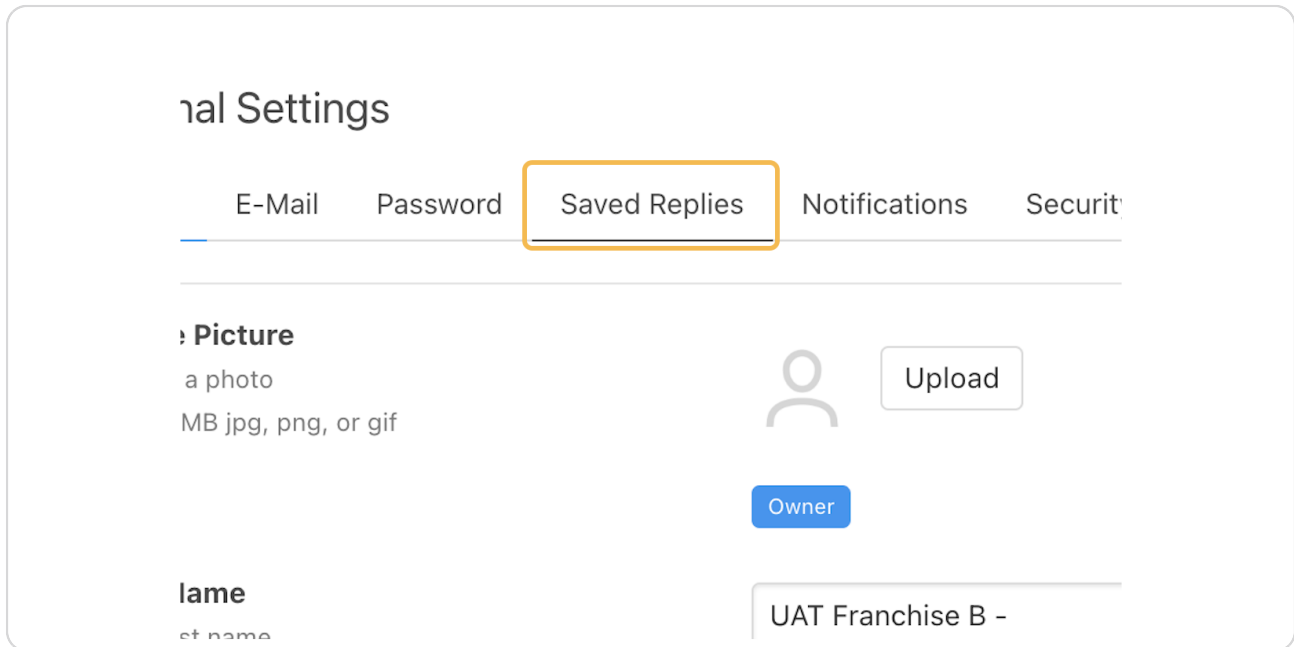
STEP 23

Click on Settings



STEP 24

Click on Saved Replies



STEP 25

Here you can manage your Saved Replies outside of the feature within the Conversations text box.

