

Sola Salon Studios - SalesMsg Texting and Calling

Texting and Calling are core functionalities of SalesMsg. Messages will sync to HubSpot deal cards. This guide will walk you through:

- Texting
 - Saved Replies
 - Contact Card
 - Internal Notes
- Calling
- Contacts
- Broadcasts
- Keywords

58 Steps [View most recent version](#) 

Created by

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Mar 12, 2025

Texting

Jump into SalesMsg.

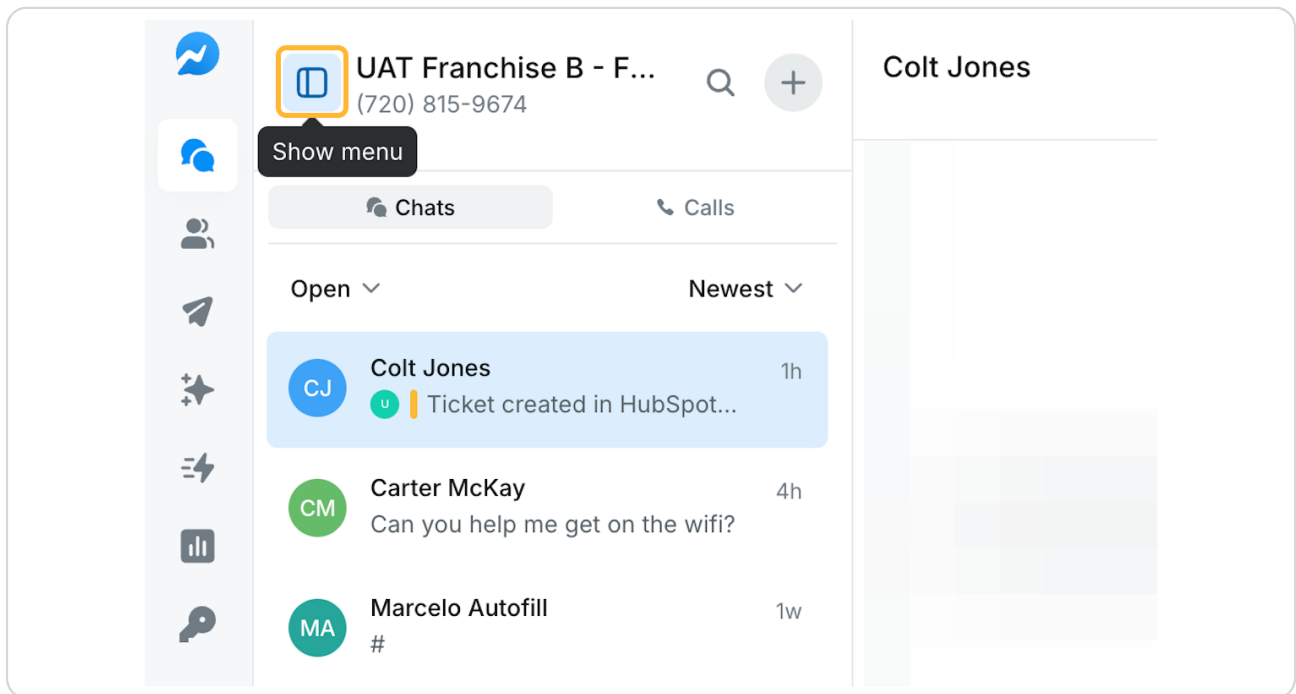
Note: Calls and messages are mixed in the conversation feed.

All messaging and calling activities will be automatically stored on the HubSpot Deal and Contact.

i SalesMsg text or Conversations is the primary functionality that you'll most utilize. Drip Campaigns will be automatically initiated in SalesMsg and you can follow up with Personalized messages.

STEP 1

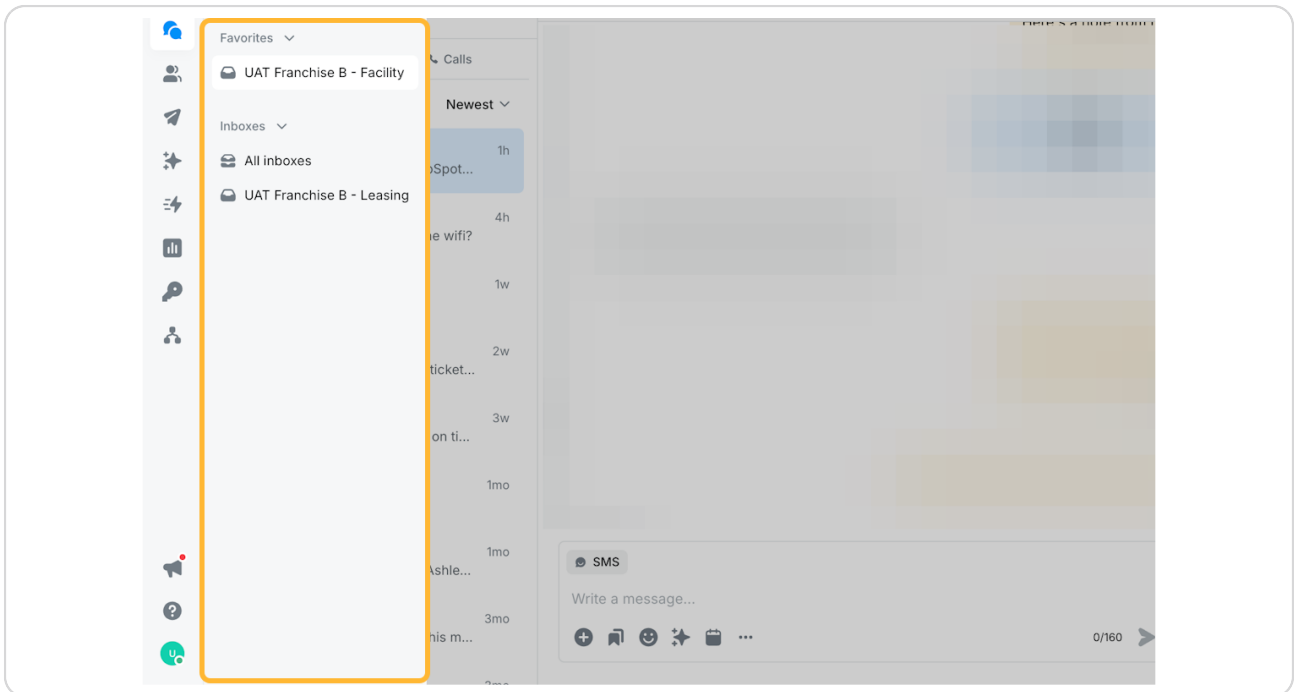
Click on the Menu



STEP 2

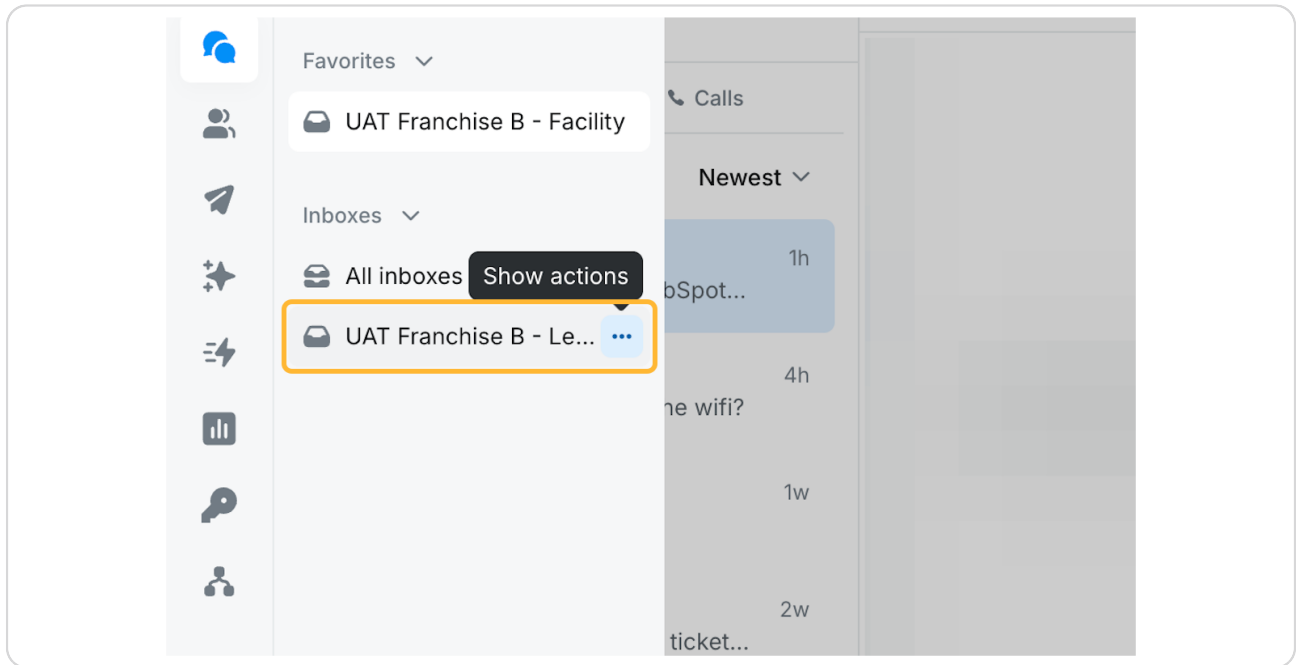
The Menu will populate

This will show you your favorite locations within Conversations along with the Inboxes you are part of.



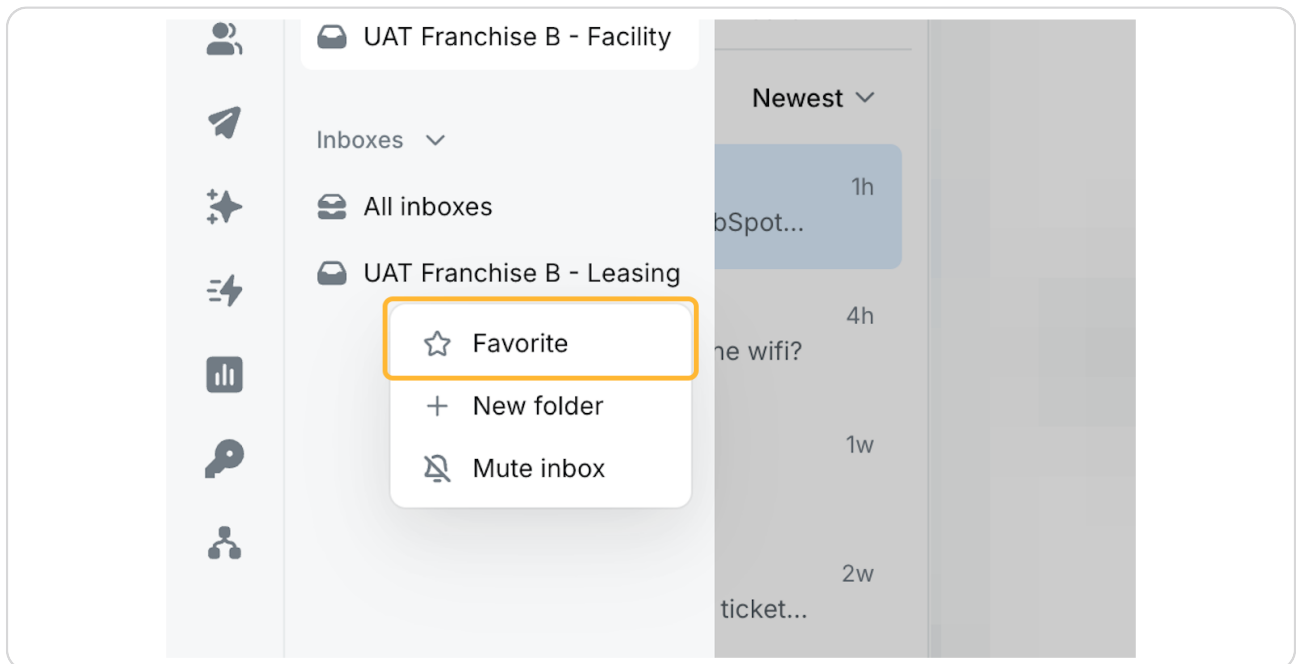
STEP 3

To favorite an Inbox, hover over the Inbox and Click the 3 dots



STEP 4

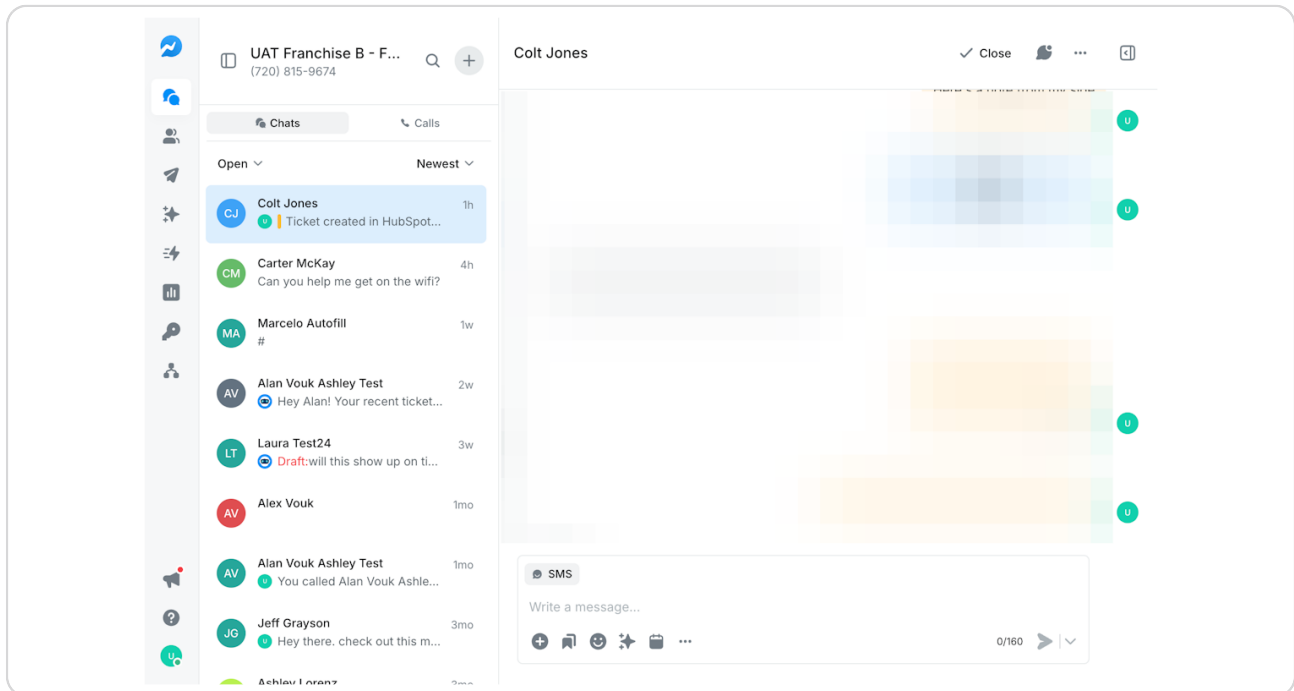
Click on Favorite



STEP 5

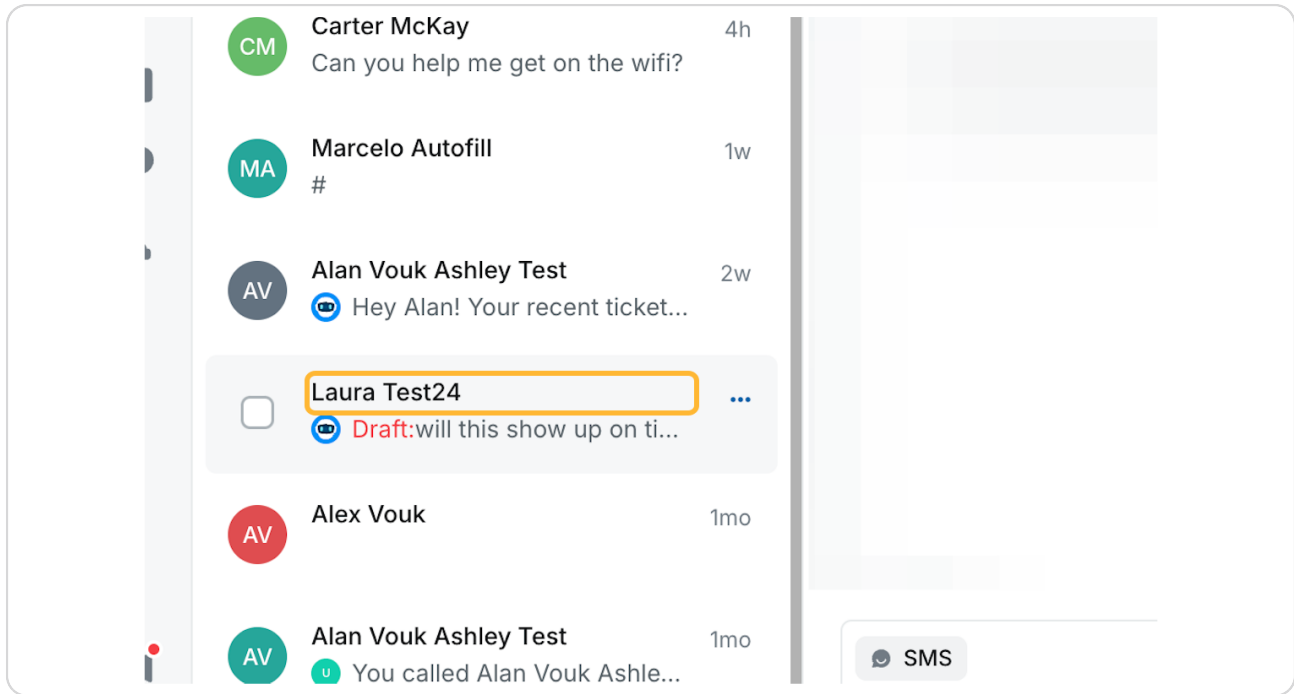
The Conversations section will look similar to other communications/platformed used in the past. These will look like iPhone conversations.

This is where you will be taken when you first log into SalesMsg.



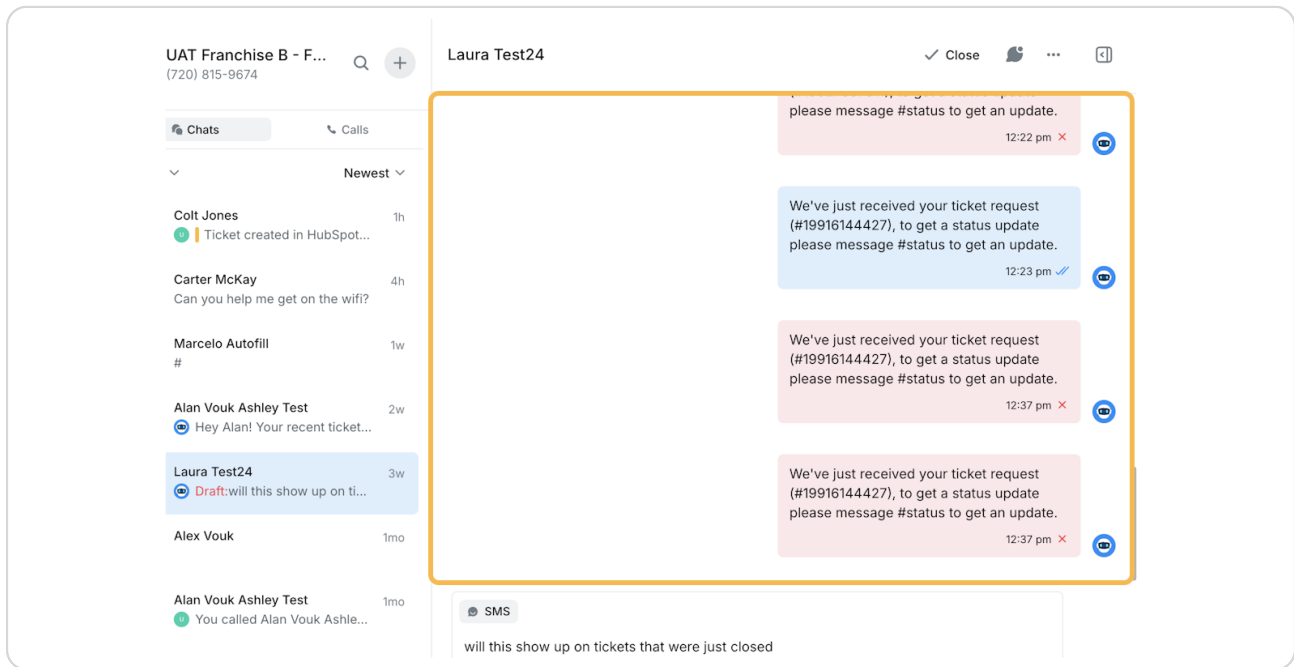
STEP 6

To compose a text message, you can either Click on a conversation to send a message



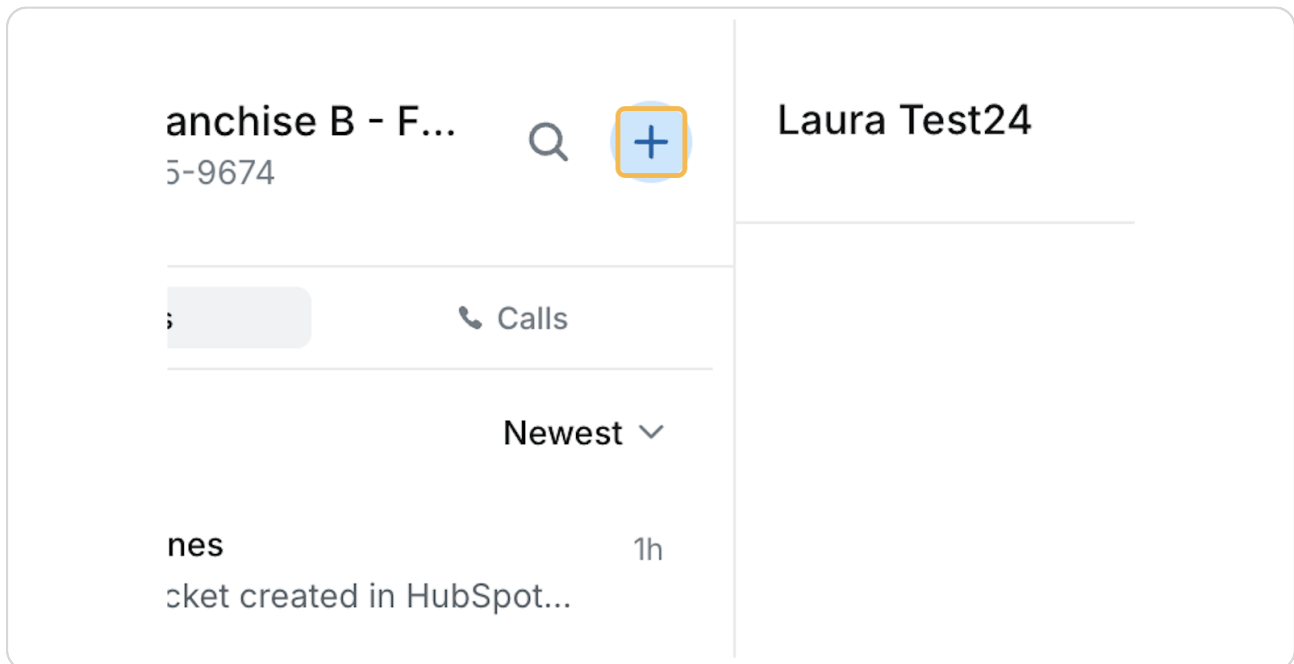
STEP 7

This will bring you into the conversation where you can send a message



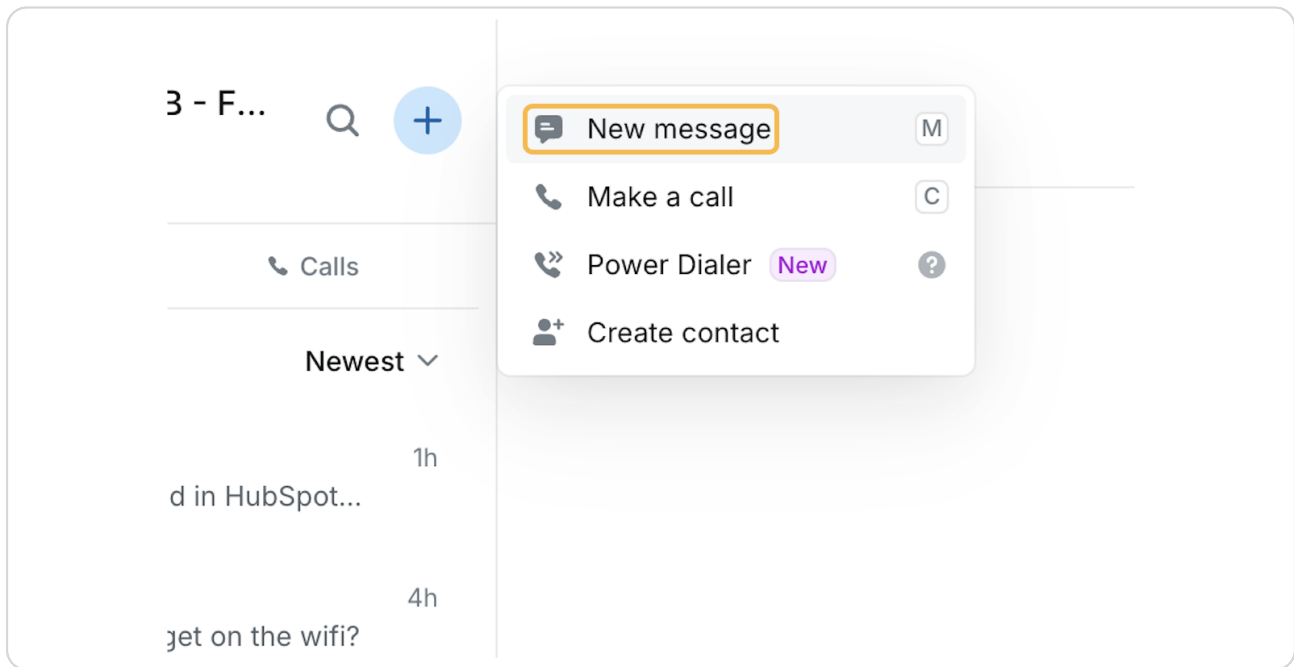
STEP 8

Or you can send a new conversation by Clicking the Plus button



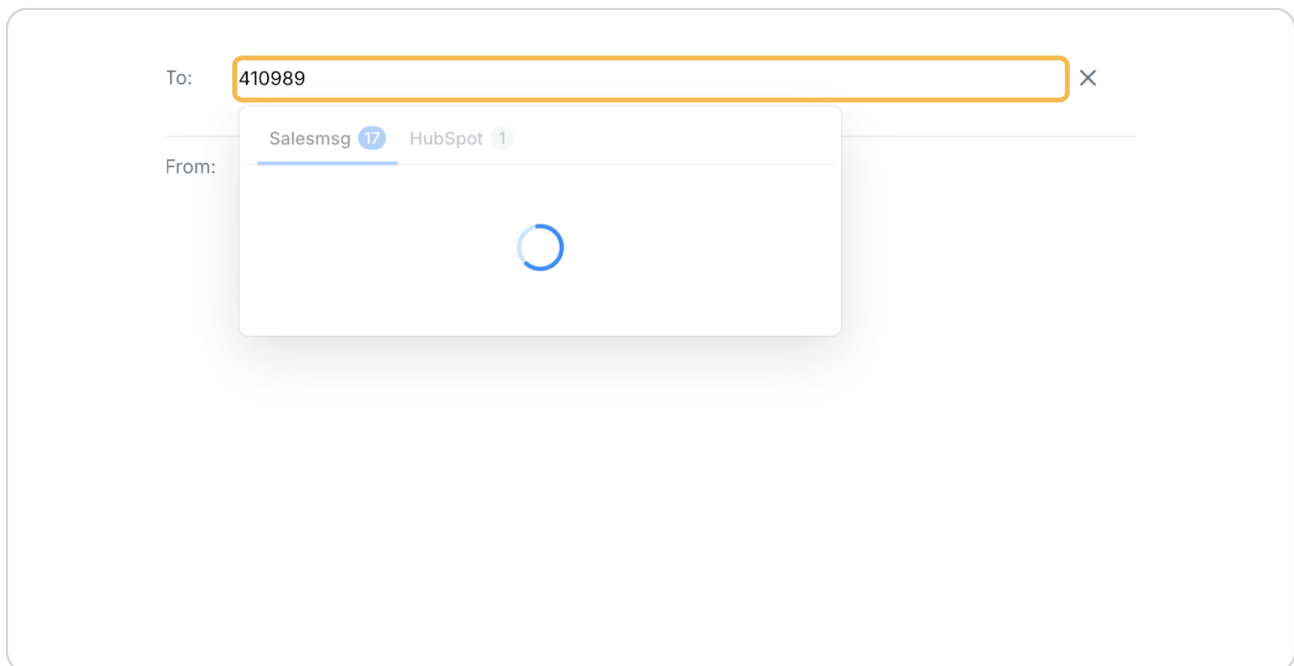
STEP 9

Click on New message



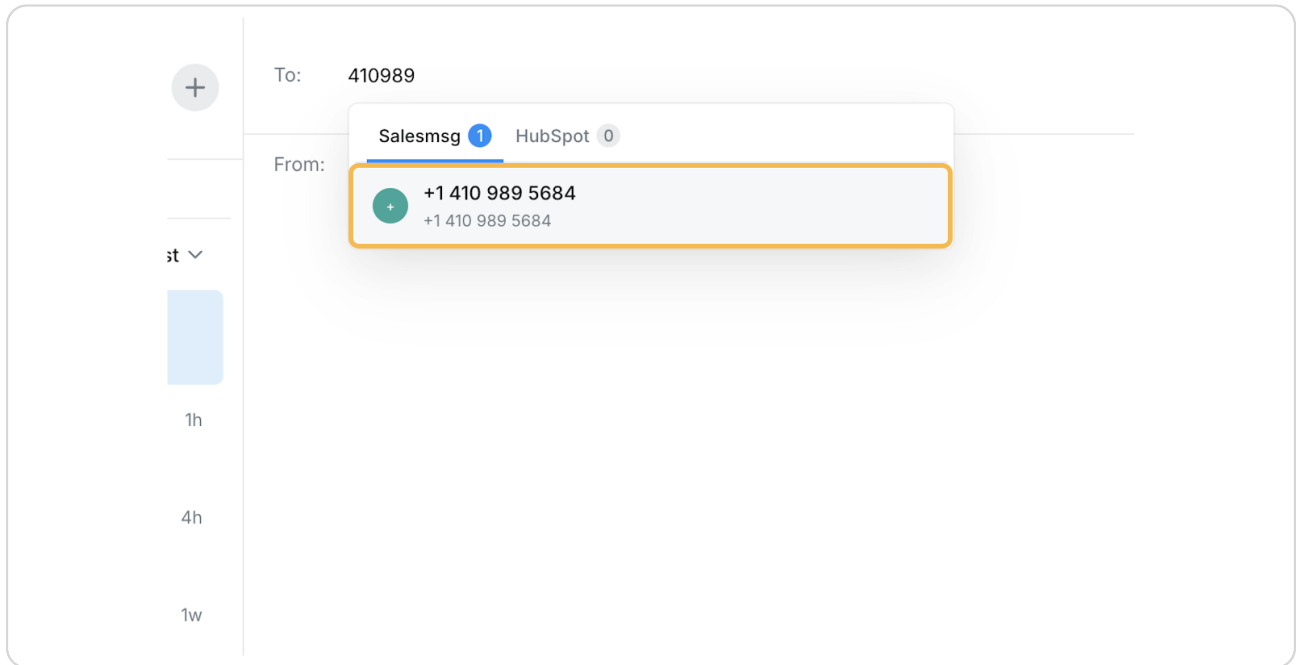
STEP 10

Find the Contact or insert the Phone number



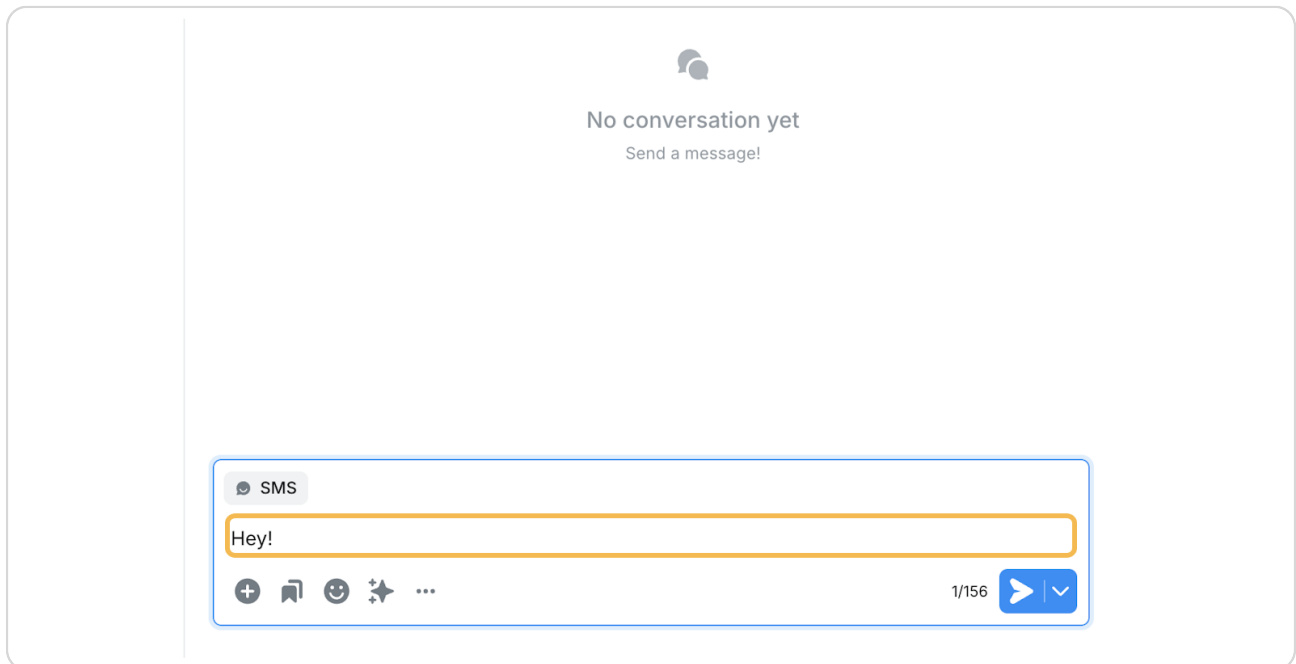
STEP 11

Add the Contact



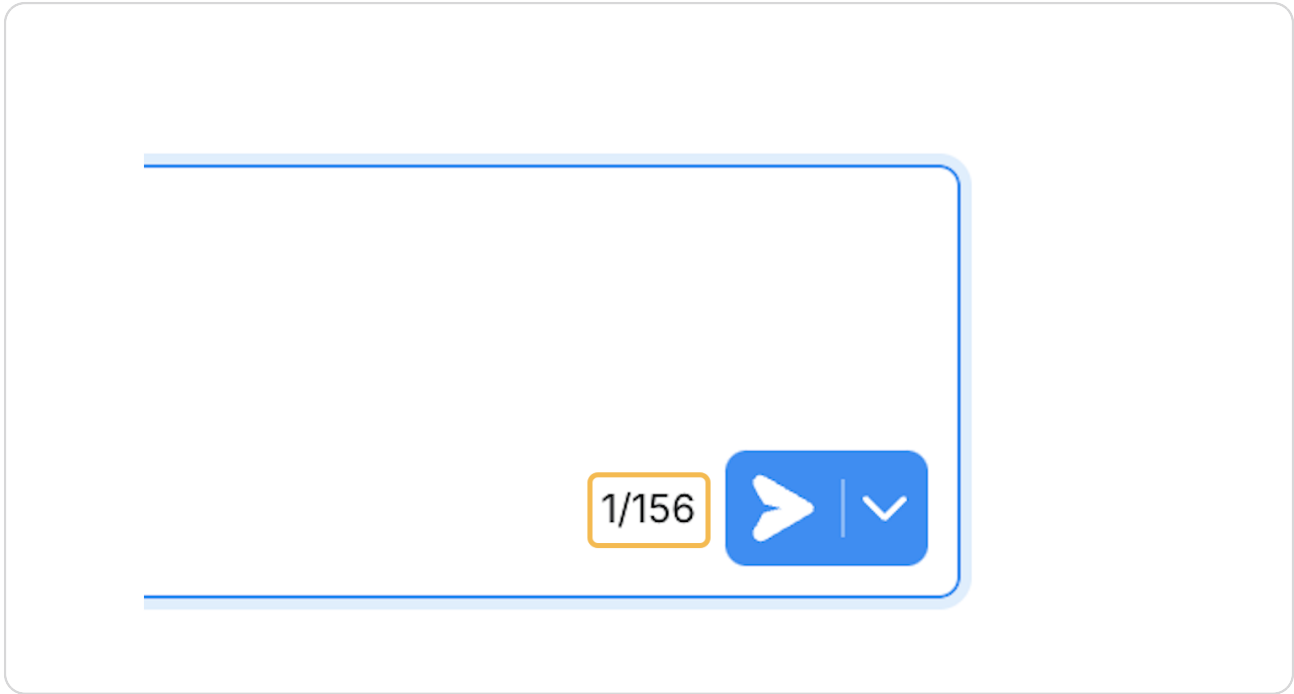
STEP 12

Start typing your message



STEP 13

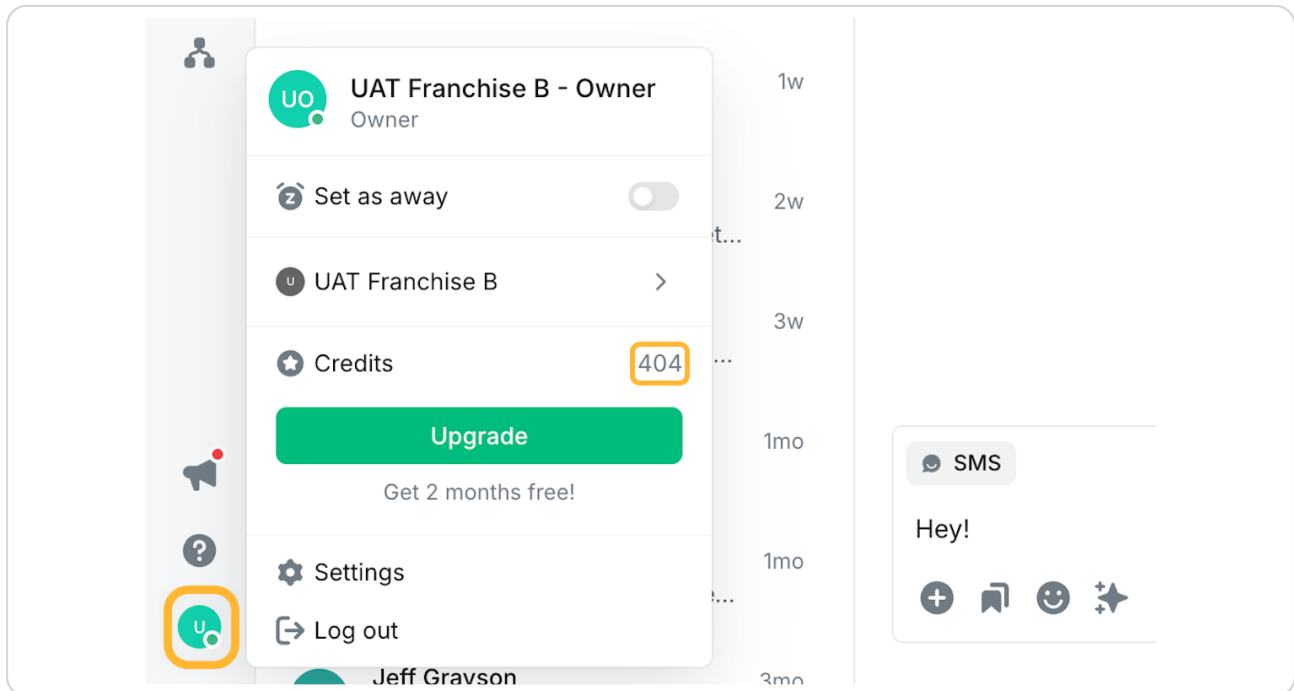
You'll want to pay attention to a few things when texting. The first is the character count down at the bottom of the message you're typing.



STEP 14

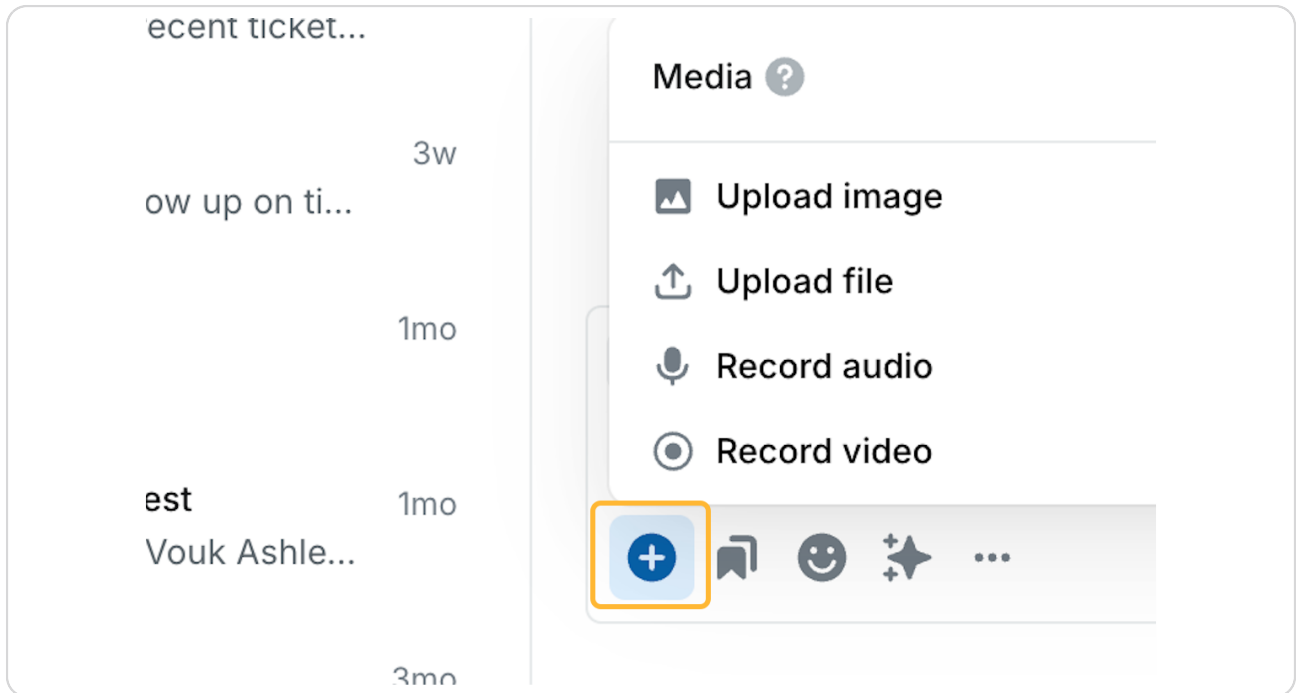
Every text message costs one credit. You can see how many credits you have by clicking the profile button

Note: You can go over 156 characters. It will cost more than one credit.



STEP 15

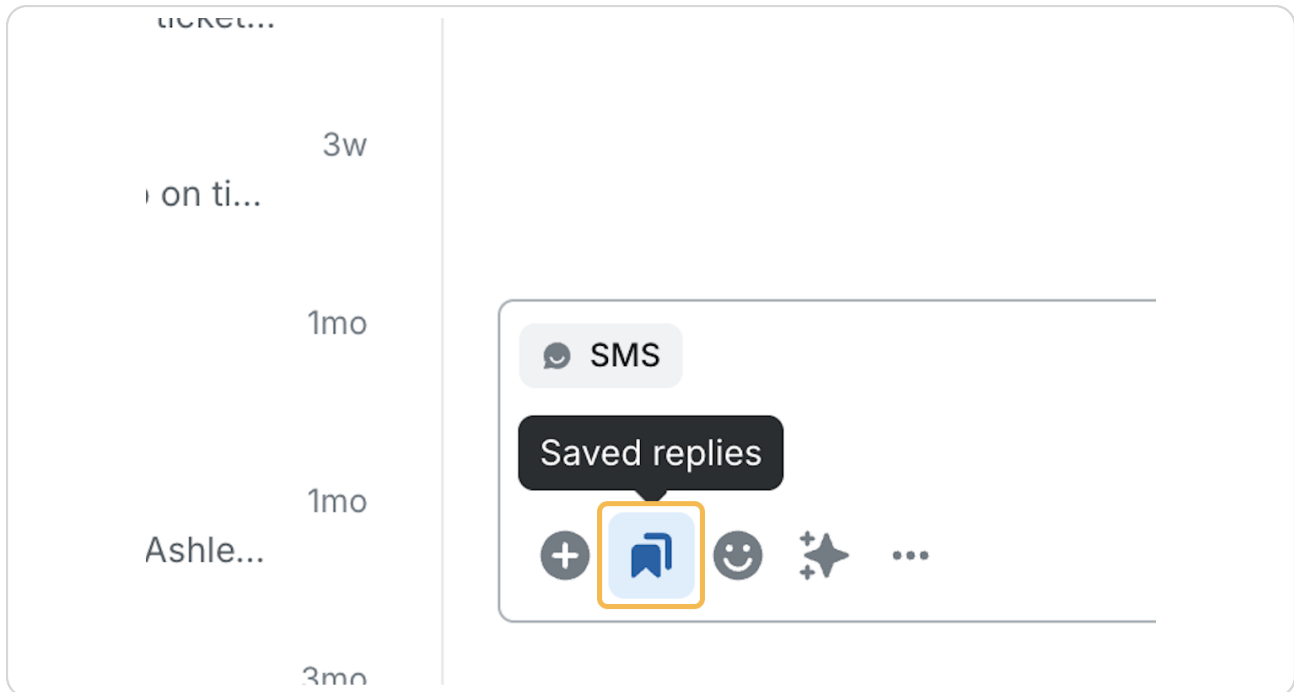
You have the ability to Add media by clicking the Plus button in the text box



STEP 16

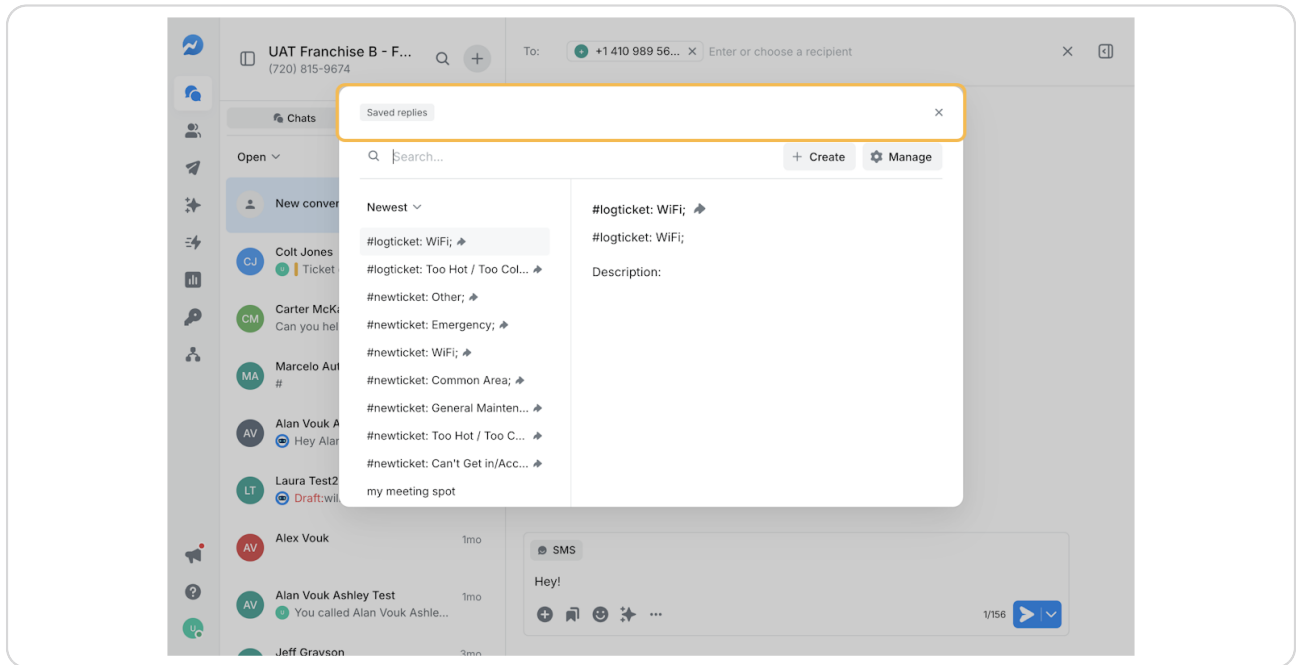
Access Saved replies

This feature allows you to build out canned replies if you're finding yourself typing in something over and over. This is a great way to save some time.



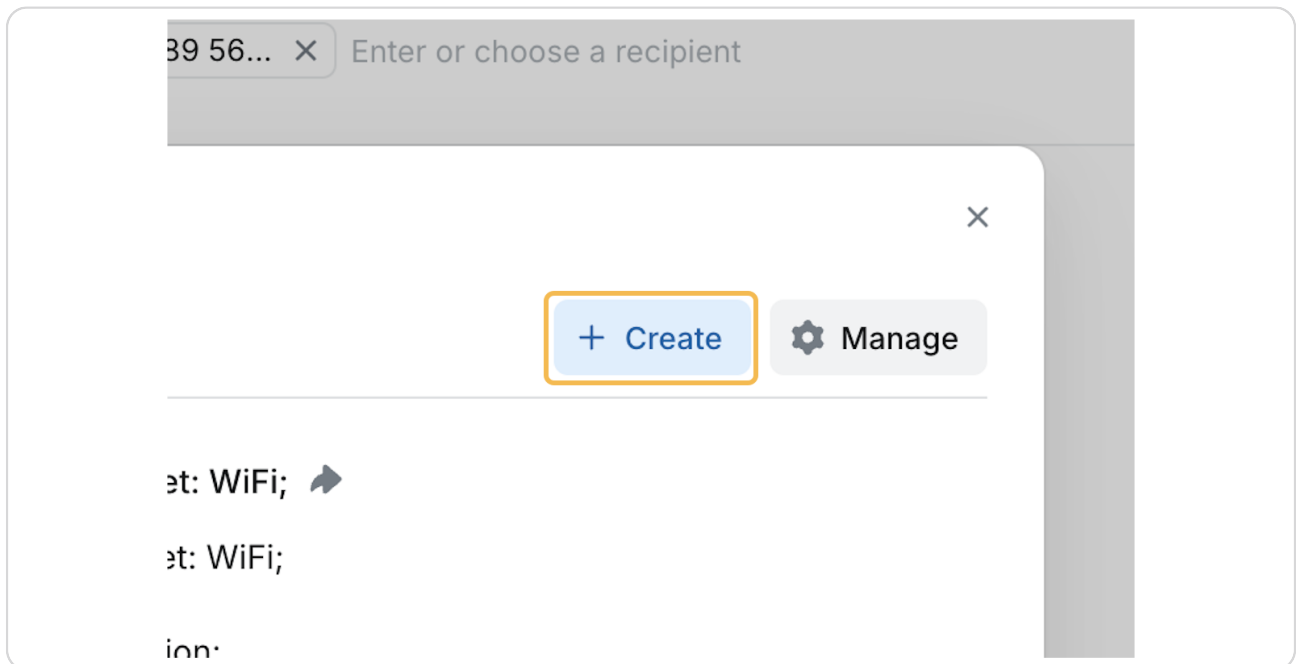
STEP 17

Choose from a Saved reply



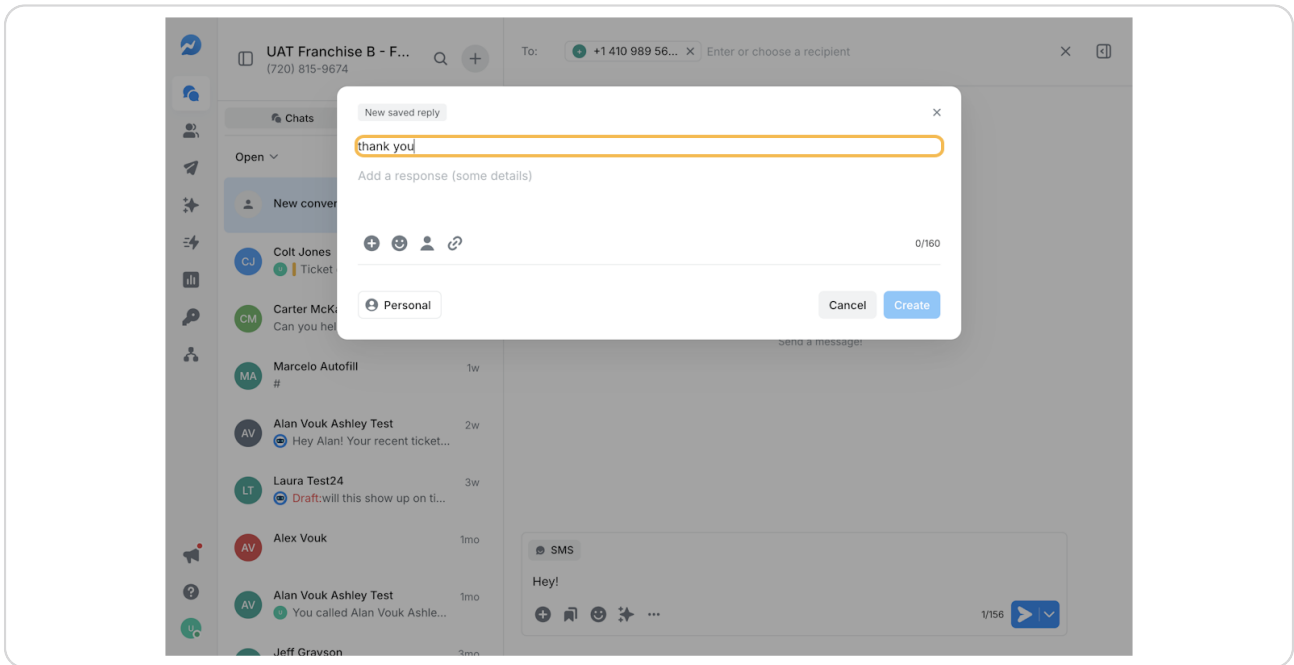
STEP 18

Or create a new one by Clicking on Create



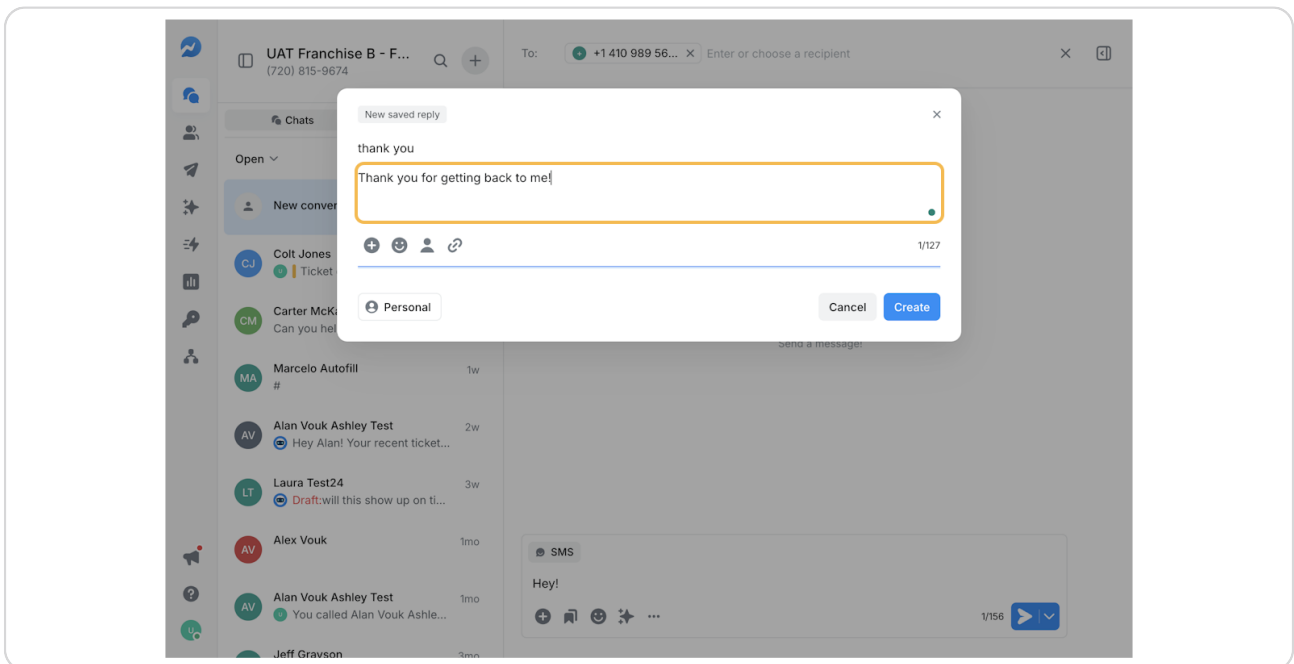
STEP 19

Add a Title



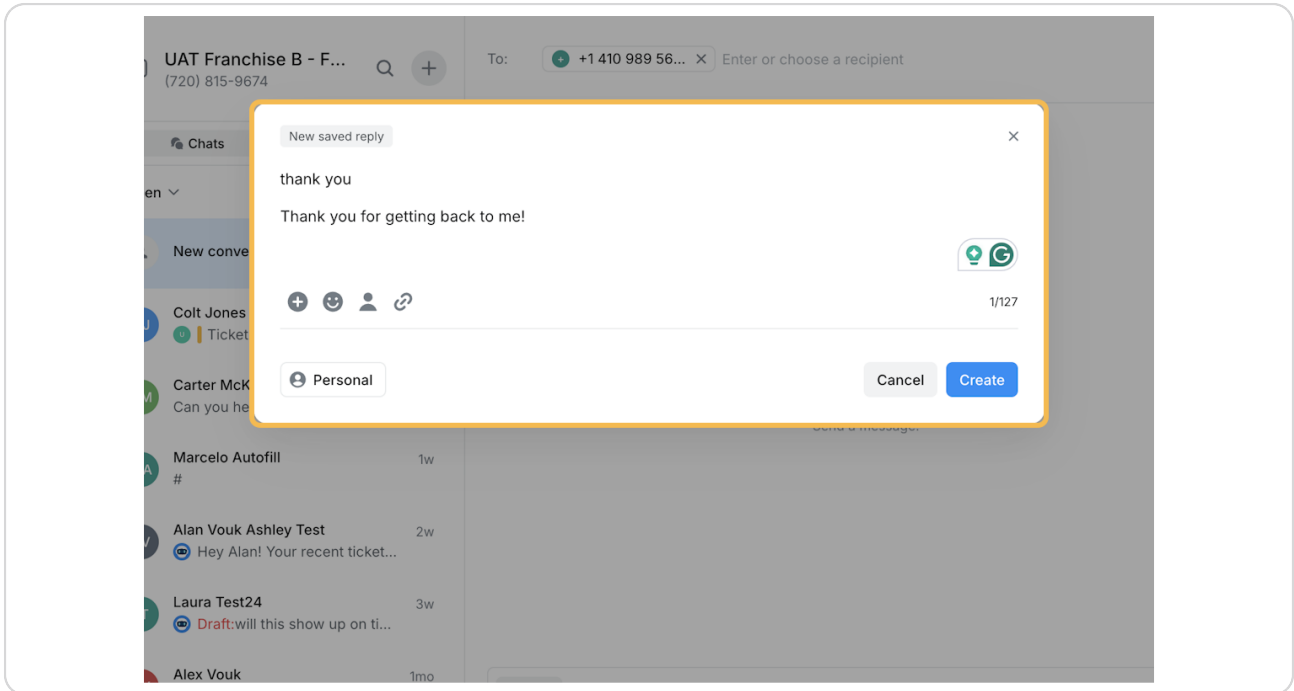
STEP 20

Add a response message



STEP 21

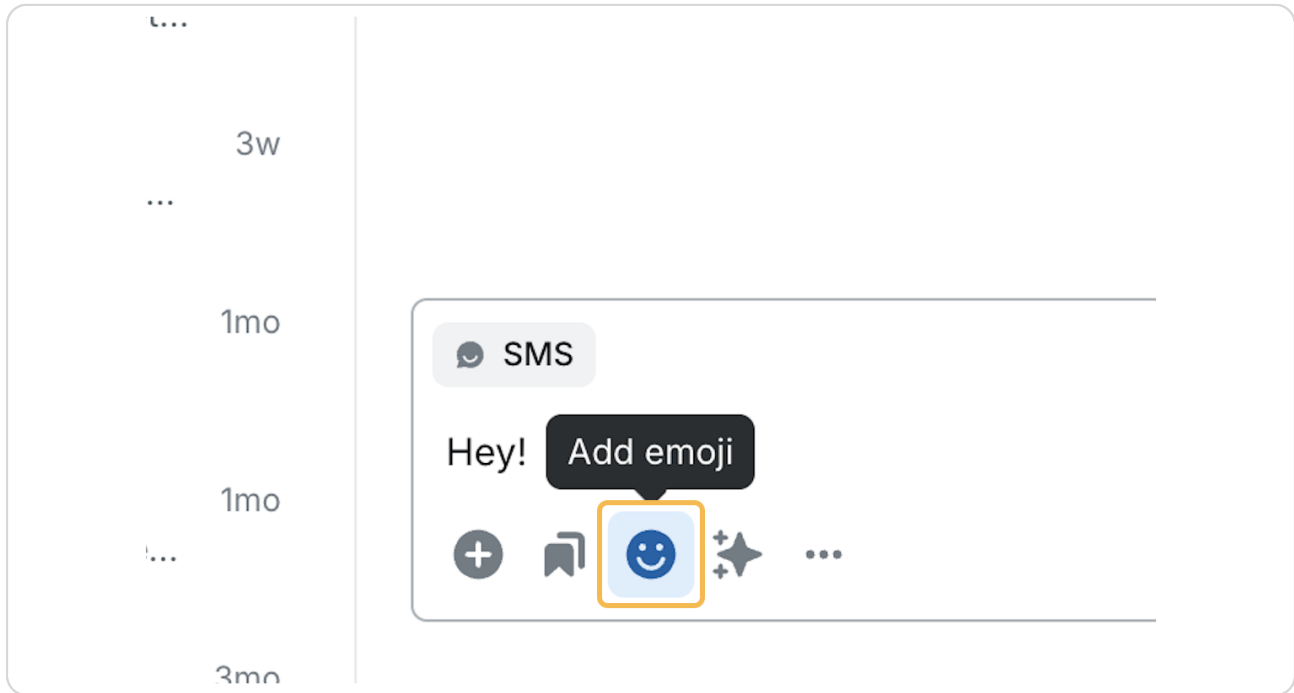
Click on Create



STEP 22

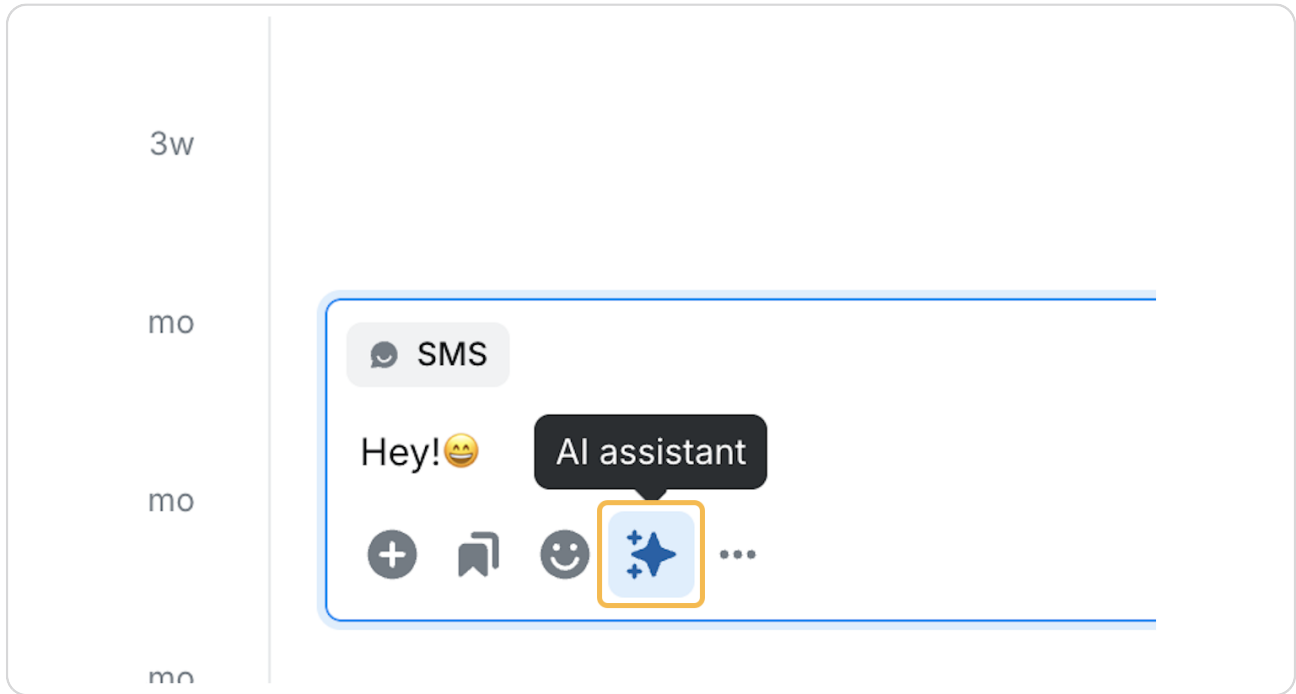
You can add an emoji

Note: These eat up a lot of characters. We recommend is one emoji is plenty.



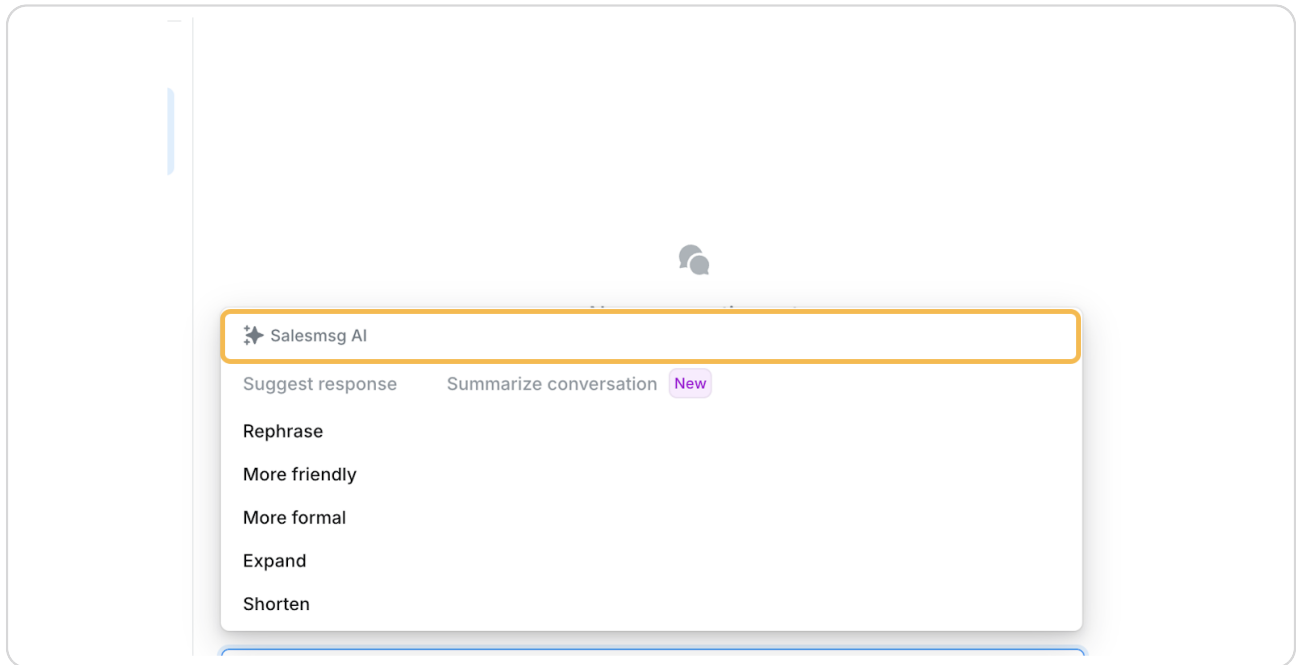
STEP 23

There is an AI assistant



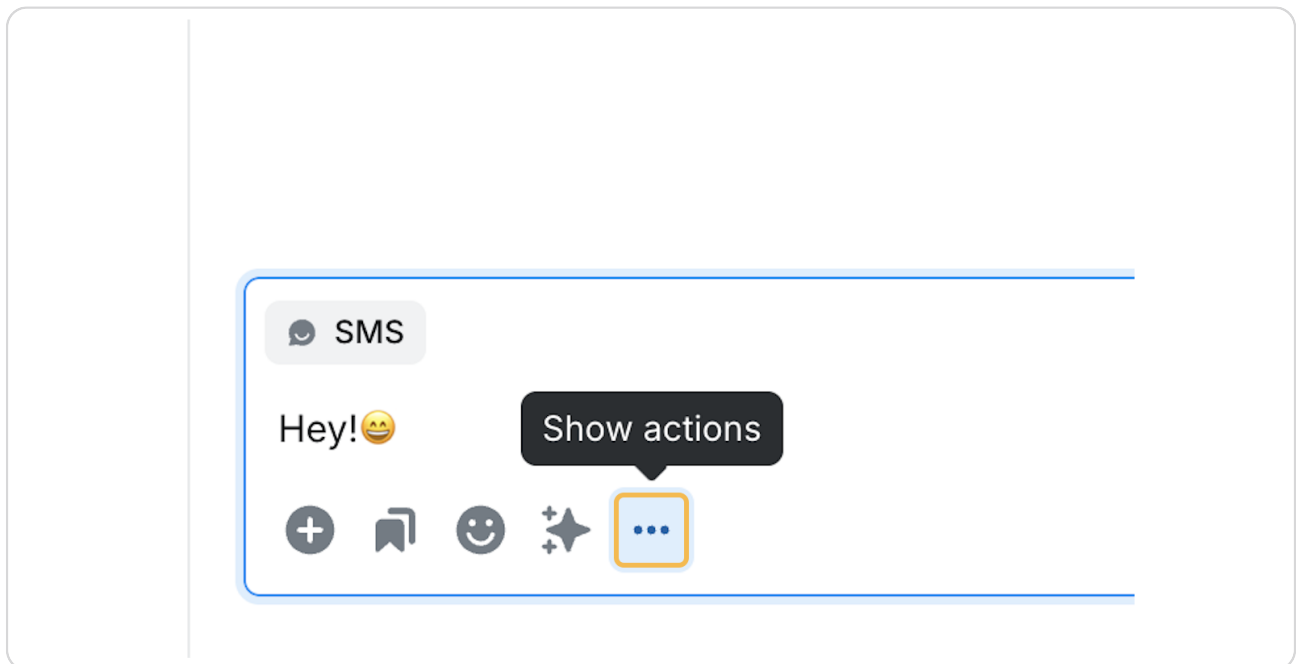
STEP 24

This will allow you to rephrase or make your message more friendly



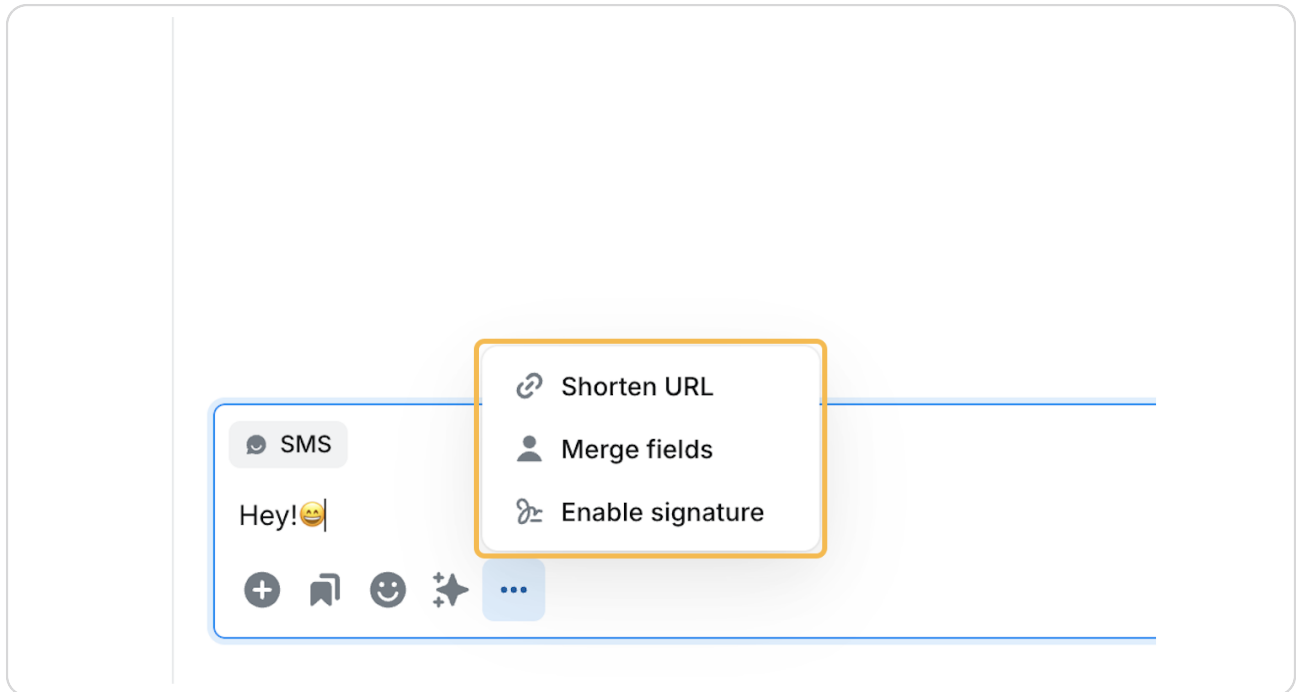
STEP 25

For more actions, Click on the 3 dots



STEP 26

You can Shorten a URL if you are sharing a link, add in Merge fields from HubSpot and enable a signature

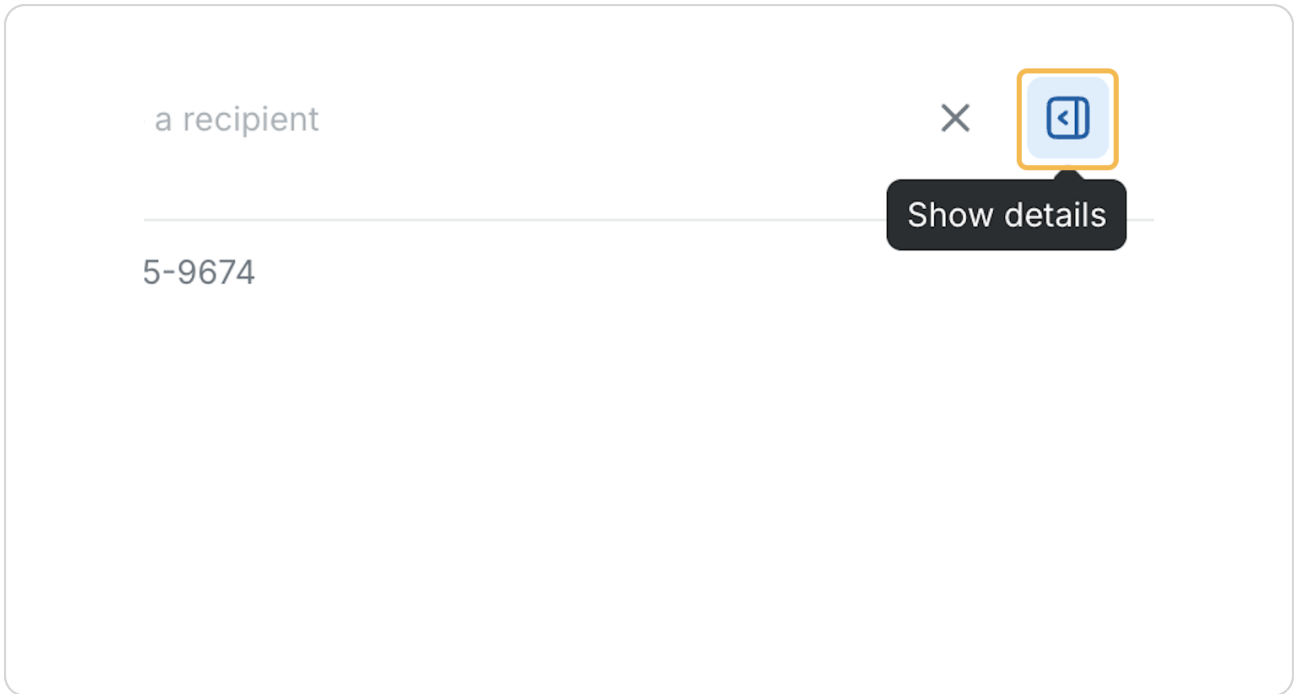


Accessing the Contact Card

7 Steps

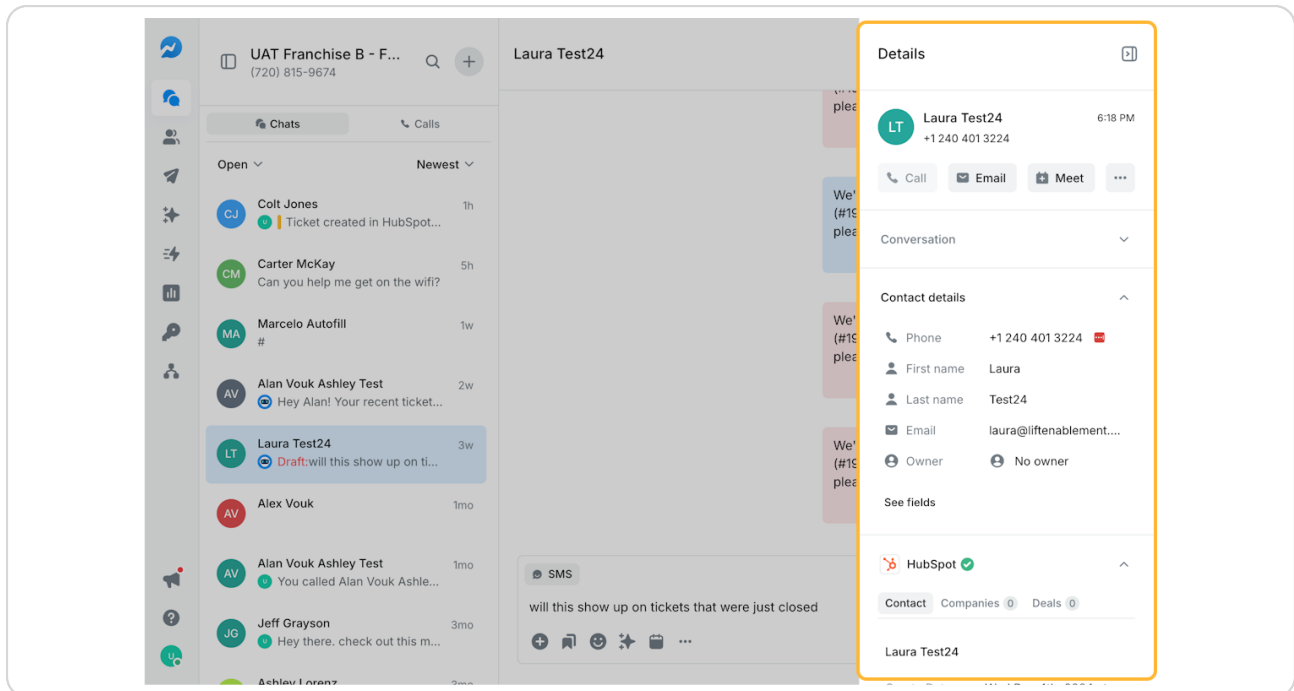
STEP 27

Click on Show Details button in the top right corner (unless the Contact Card is already visible)



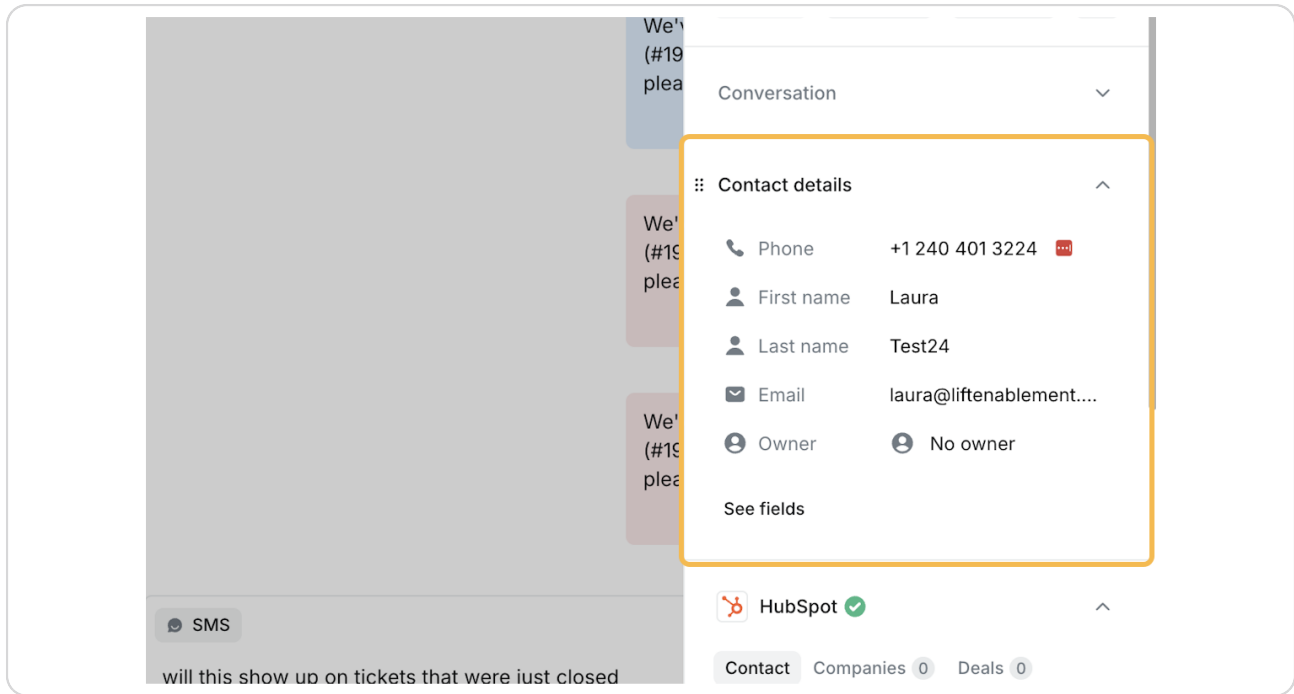
STEP 28

The Contact Card will open



STEP 29

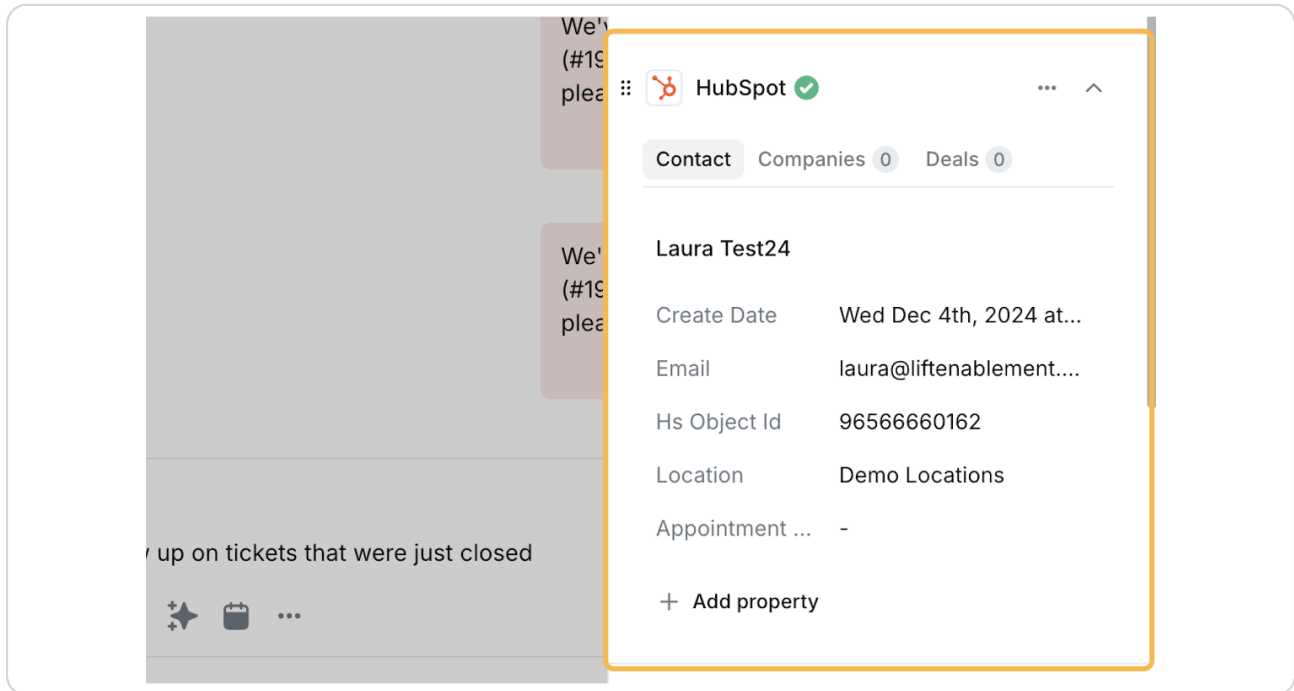
You'll be able to see the Contact details if they are an existing Contact in HubSpot



STEP 30

You'll be able to see synced data from HubSpot on the Contact

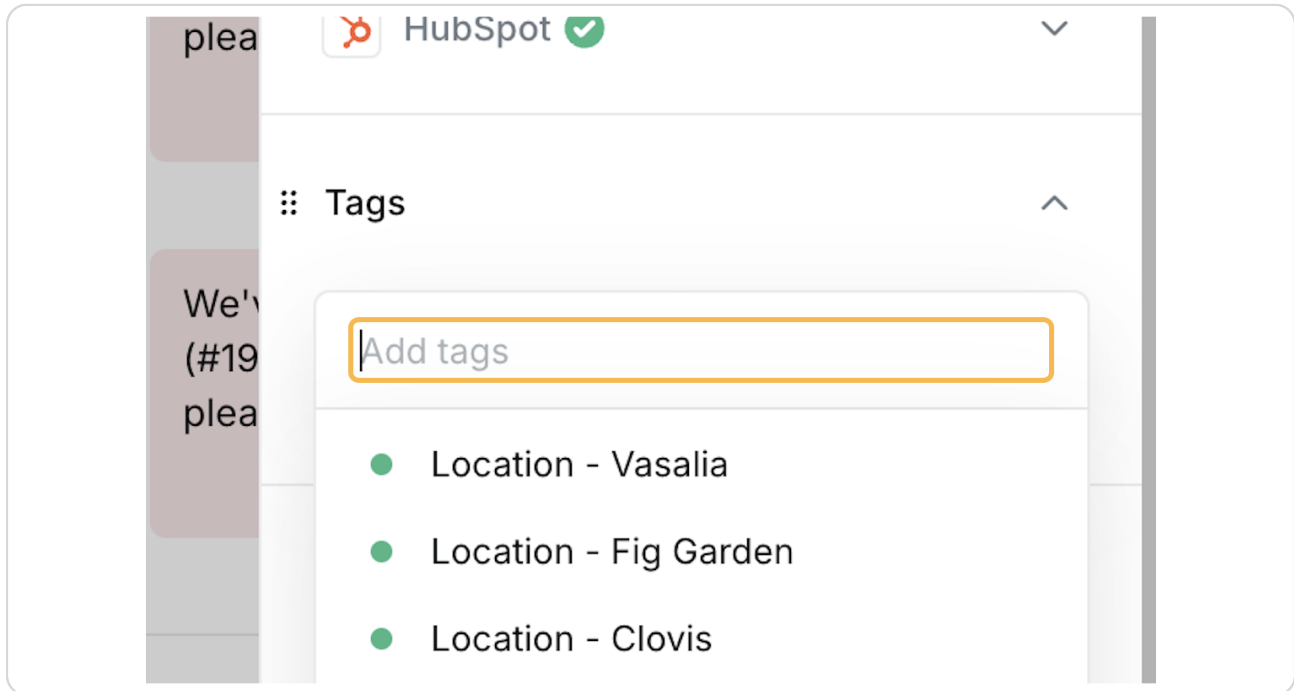
This includes top level information on the Contact, Companies, and Deals



STEP 31

You have the ability to add Tags

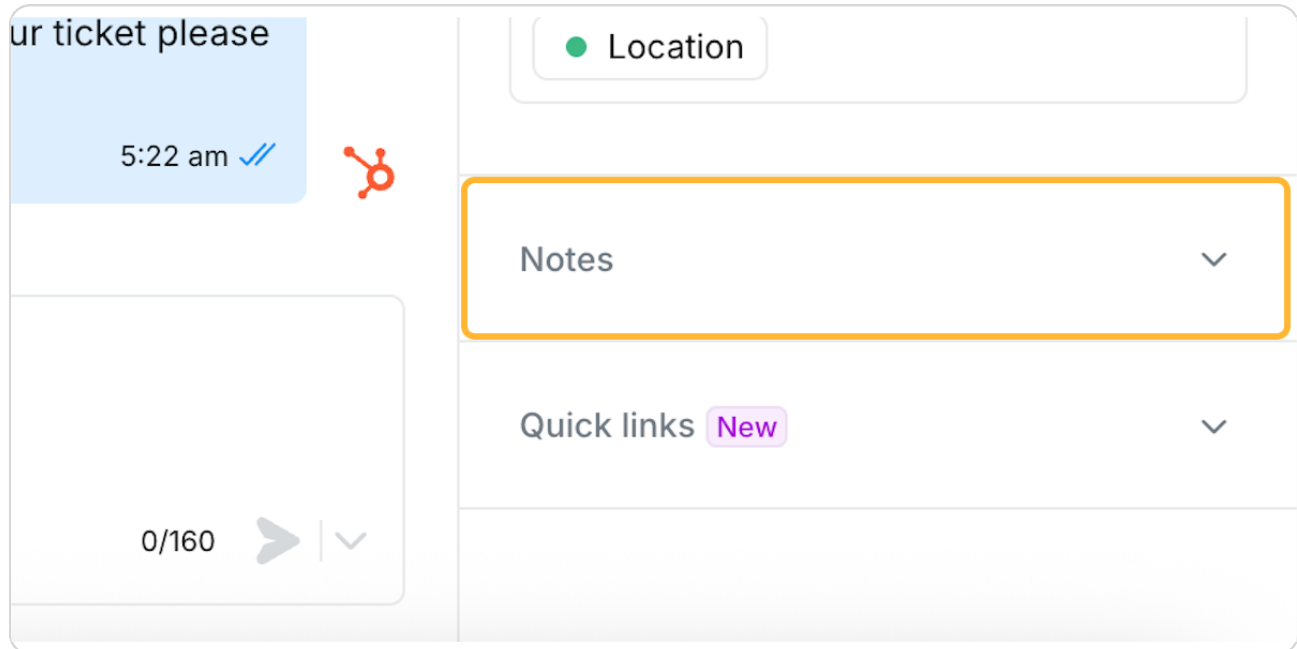
This is a great way to continue to organize your contacts.



STEP 32

There is a section for Notes on the Details panel - ignore this

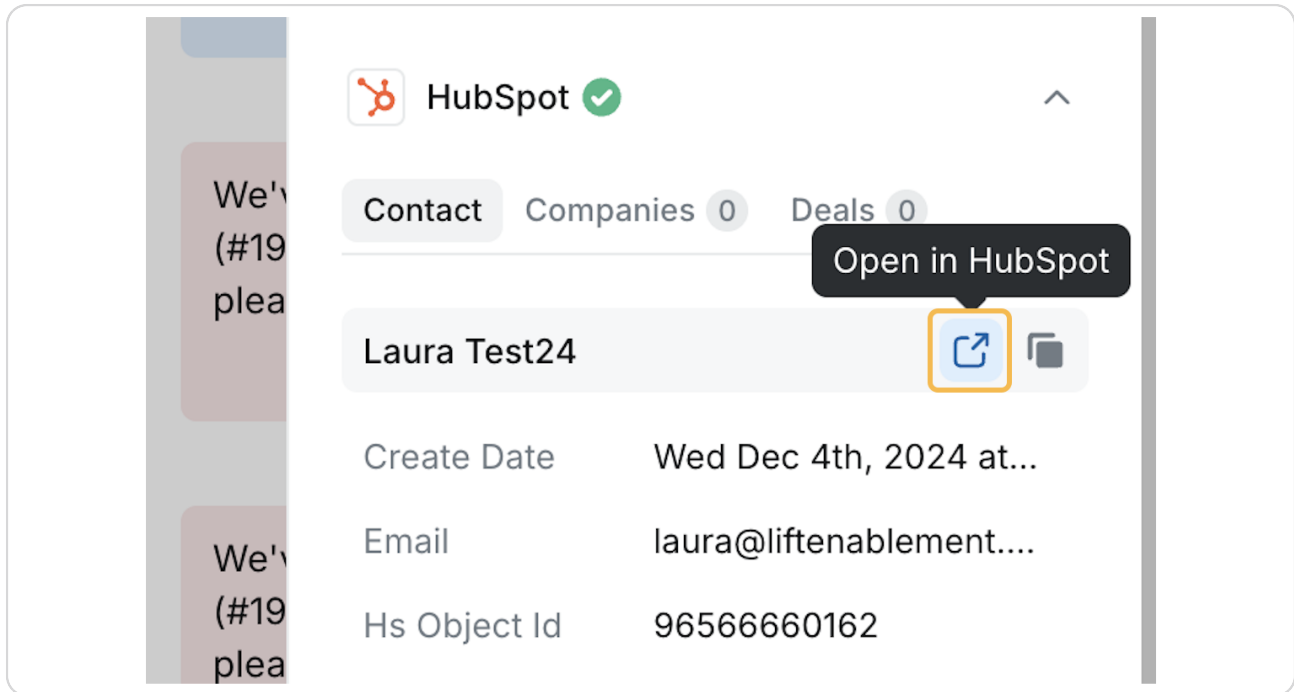
This notes section does not sync back into HubSpot. Rather, take the time to build the habit of utilizing the internal notes within the conversation instead. Those notes sync back into HubSpot.



The screenshot displays a HubSpot chat interface. On the left, a blue message bubble contains the text "ur ticket please" and "5:22 am" with a checkmark. A red HubSpot logo is visible to the right of the message. Below the message is a text input field with "0/160" characters and a send button. On the right, a details panel is shown with a "Location" dropdown menu. Below this, a "Notes" dropdown menu is highlighted with an orange border. Underneath the "Notes" menu is a "Quick links" section with a "New" button. The interface is clean and modern, with a white background and light gray borders.

STEP 33

If the Contact is a Lead in HubSpot tied to a Deal, you can jump into HubSpot to view the record



Calling in SalesMsg

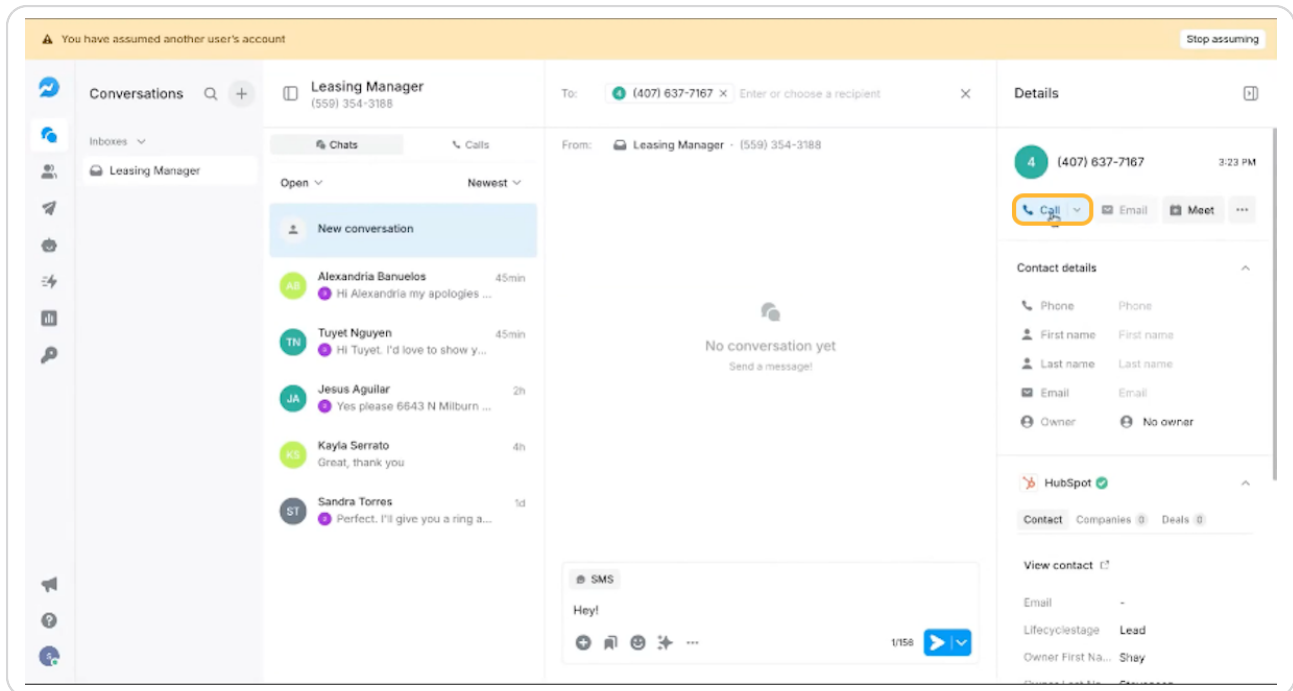
7 Steps



Basic calling in the app will allow you to keep calls routed to SalesMsg rather than personal or work phones.

STEP 34

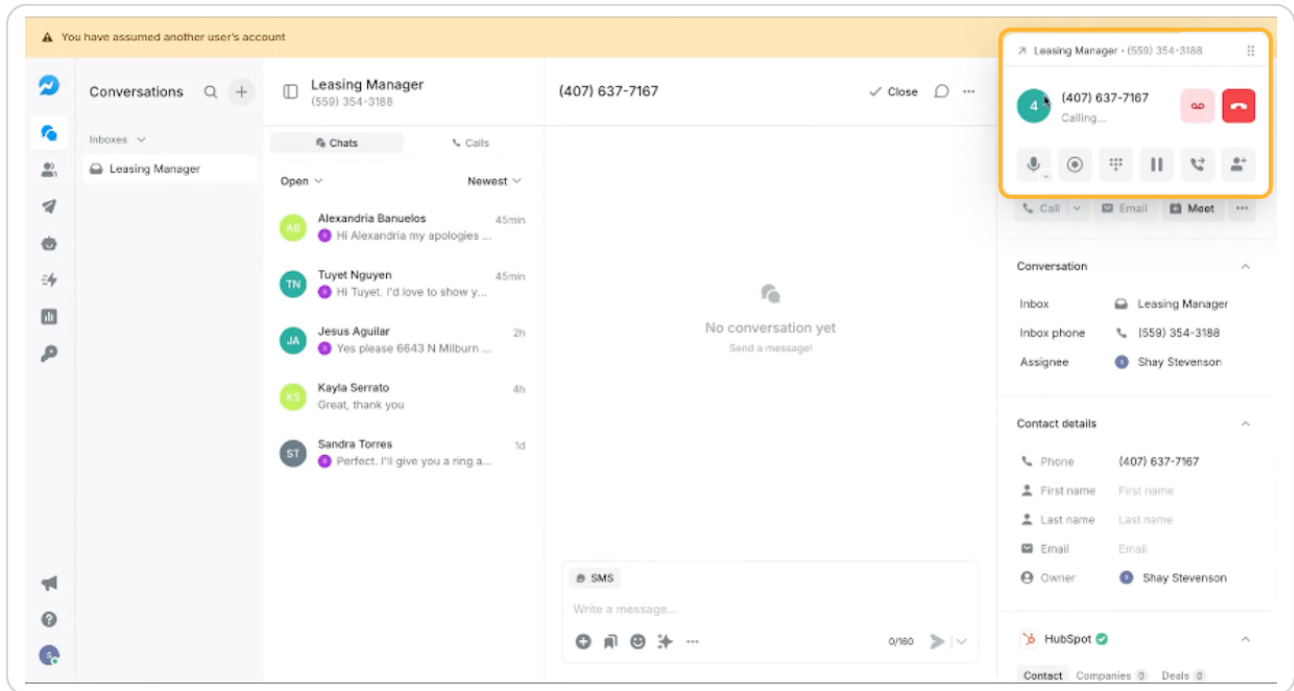
Click Call



STEP 35

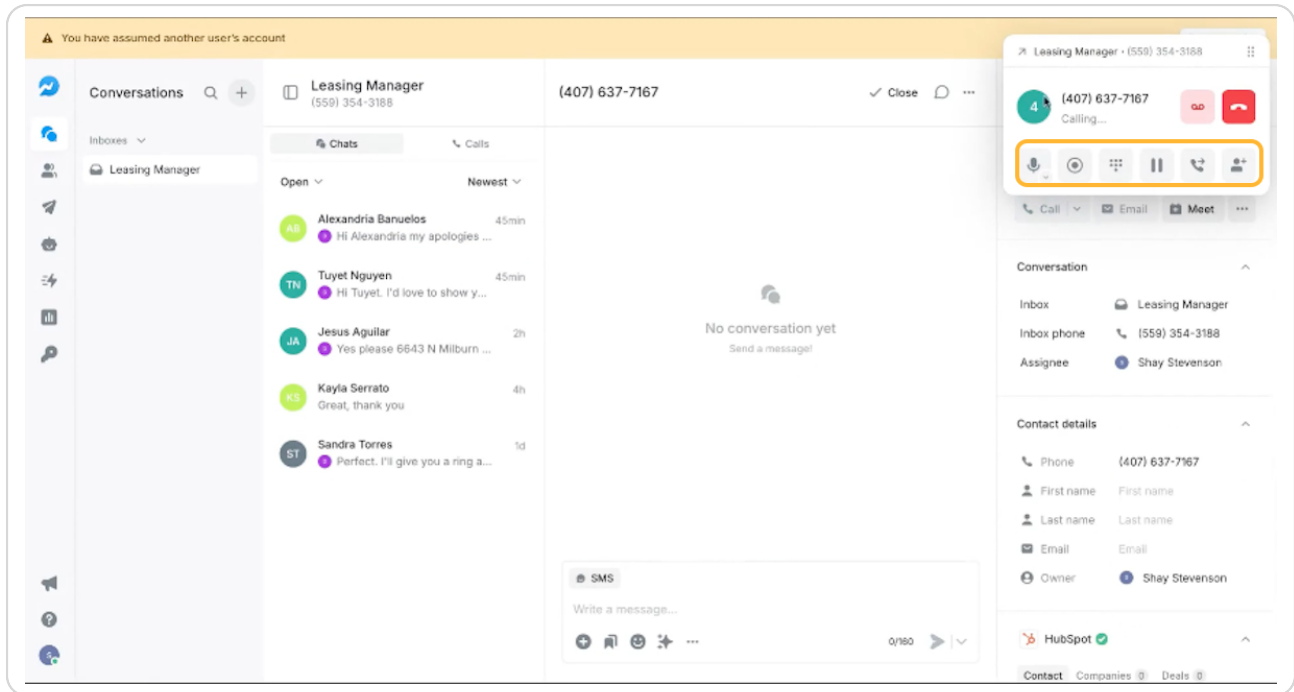
A call box will appear and will start to dial the number

You will be able to hear the call ringing.



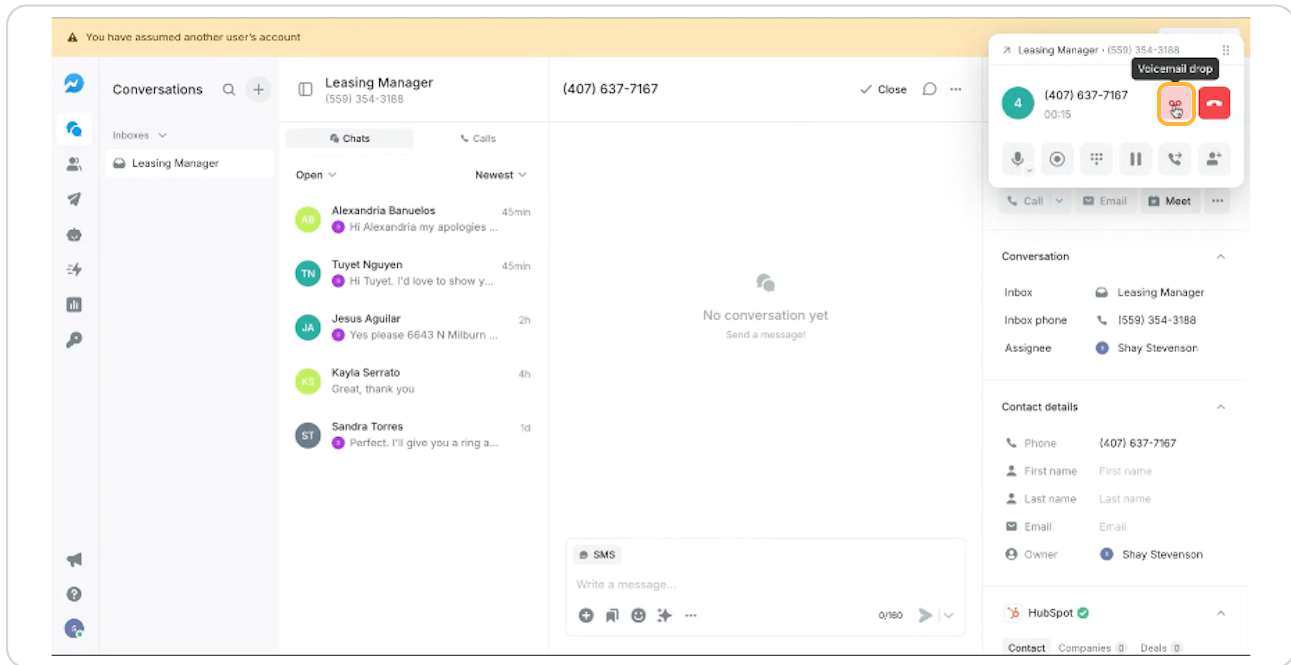
STEP 36

You have the ability to Mute, Record the call, Show a dialpad, Put the call on hold, Transfer the call, and Add others to the call



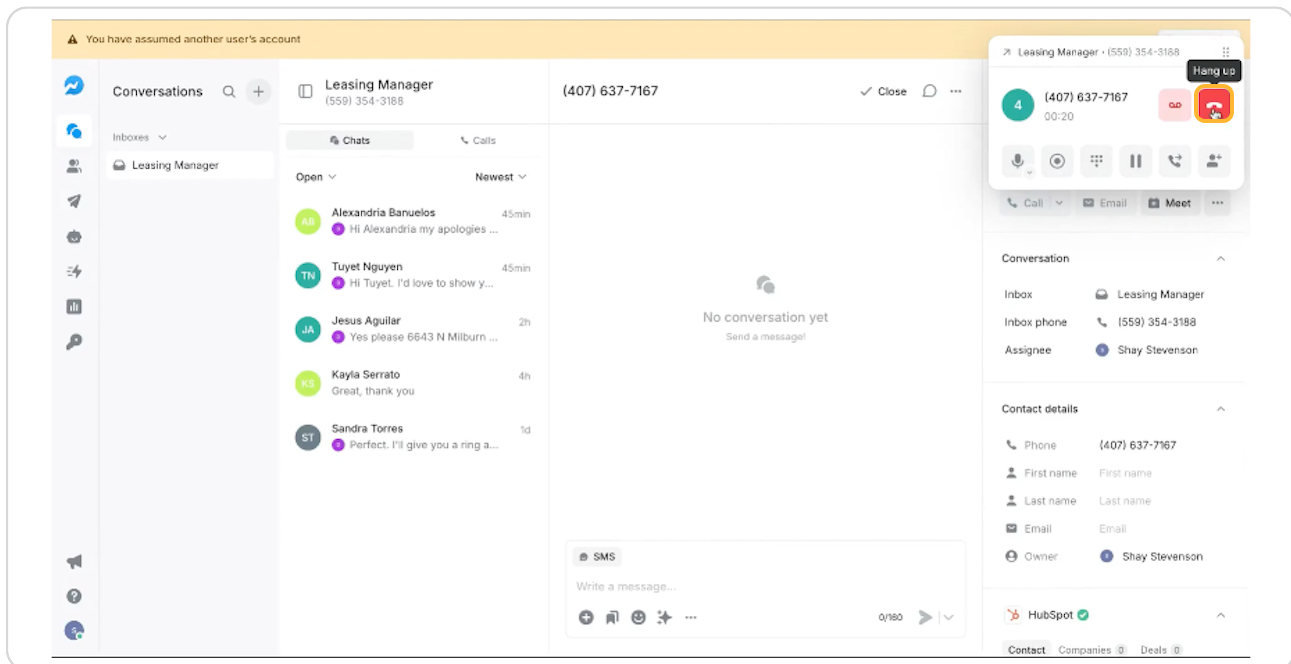
STEP 37

There is also the ability to drop a Voicemail



STEP 38

Click Hang up



STEP 39

If you are not getting the audio cues and cannot hear the call, Click the dropdown next to Call

The screenshot displays a CRM interface with a top navigation bar and a main content area. The top bar includes a warning message: "You have assumed another user's account" and a "Stop assuming" button. The main content area is divided into three sections: a sidebar, a list of conversations, and a detailed view of the selected conversation.

Sidebar: Contains navigation icons for Home, Conversations, Inboxes, Leasing Manager, and other tools.

Conversations List: Shows a list of recent conversations with contact names and timestamps. The selected conversation is "Leasing Manager" with the phone number "(559) 354-3188".

Conversation Details: Shows the contact's name "Leasing Manager", phone number "(407) 637-7167", and assignee "Shay Stevenson". The "Call" button is highlighted with a red box, and a dropdown arrow is visible next to it.

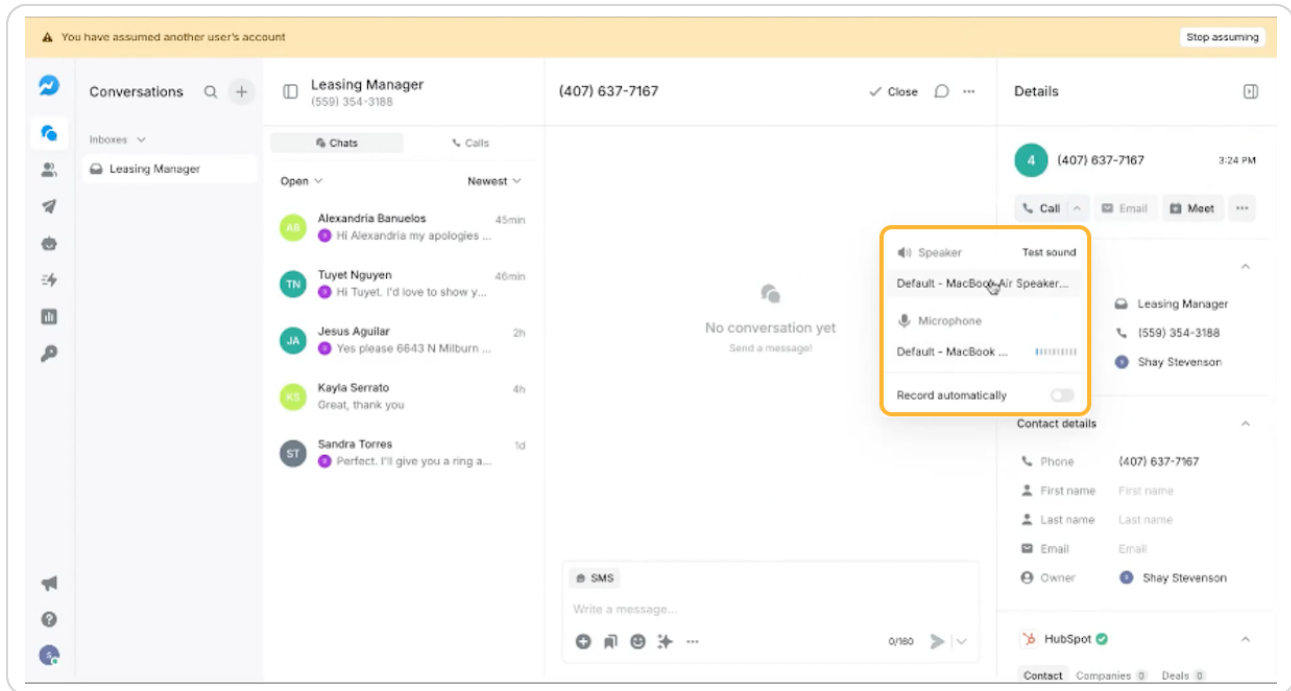
Contact Details: Shows the contact's phone number "(407) 637-7167", first name "First name", last name "Last name", email "Email", and owner "Shay Stevenson".

Message Input: A text input field with a "Write a message..." placeholder and a "0/180" character count.

STEP 40

Make sure you have a Default Speaker and Microphone chosen

Note: It should default to the computer speaker and microphone.



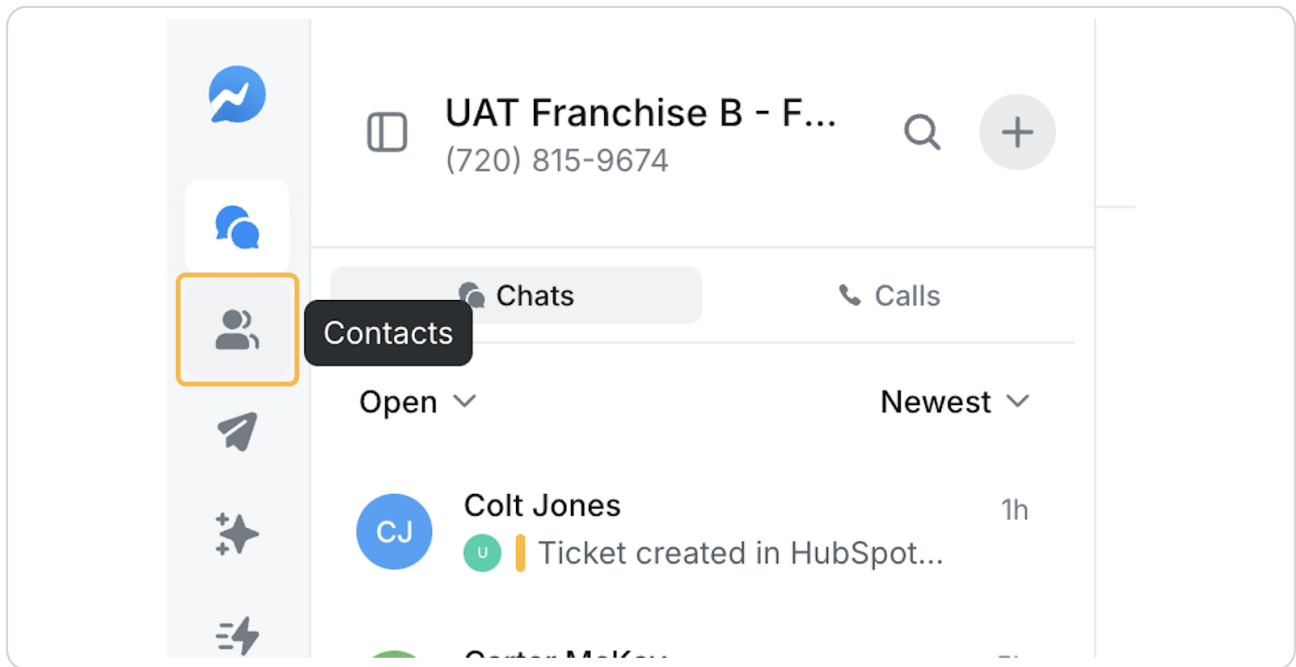
Contacts

6 Steps

i Avoid editing contacts in SalesMsg. Always update Contacts in HubSpot.

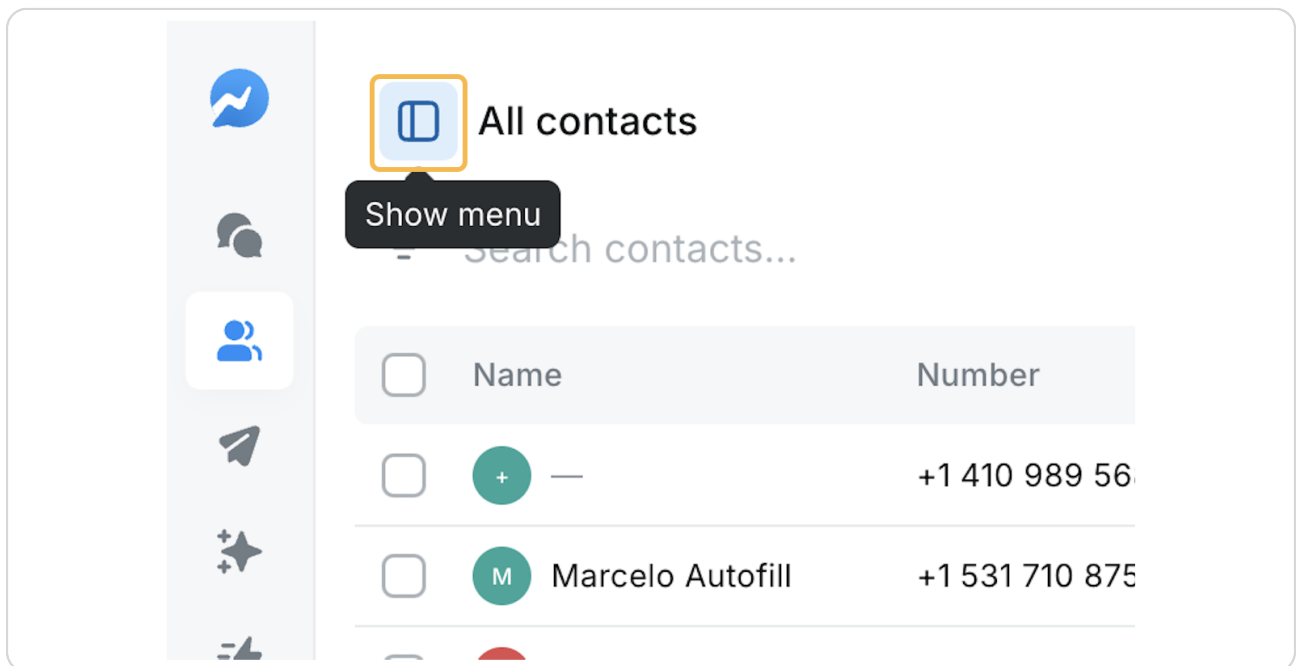
STEP 41

Click on Contacts



STEP 42

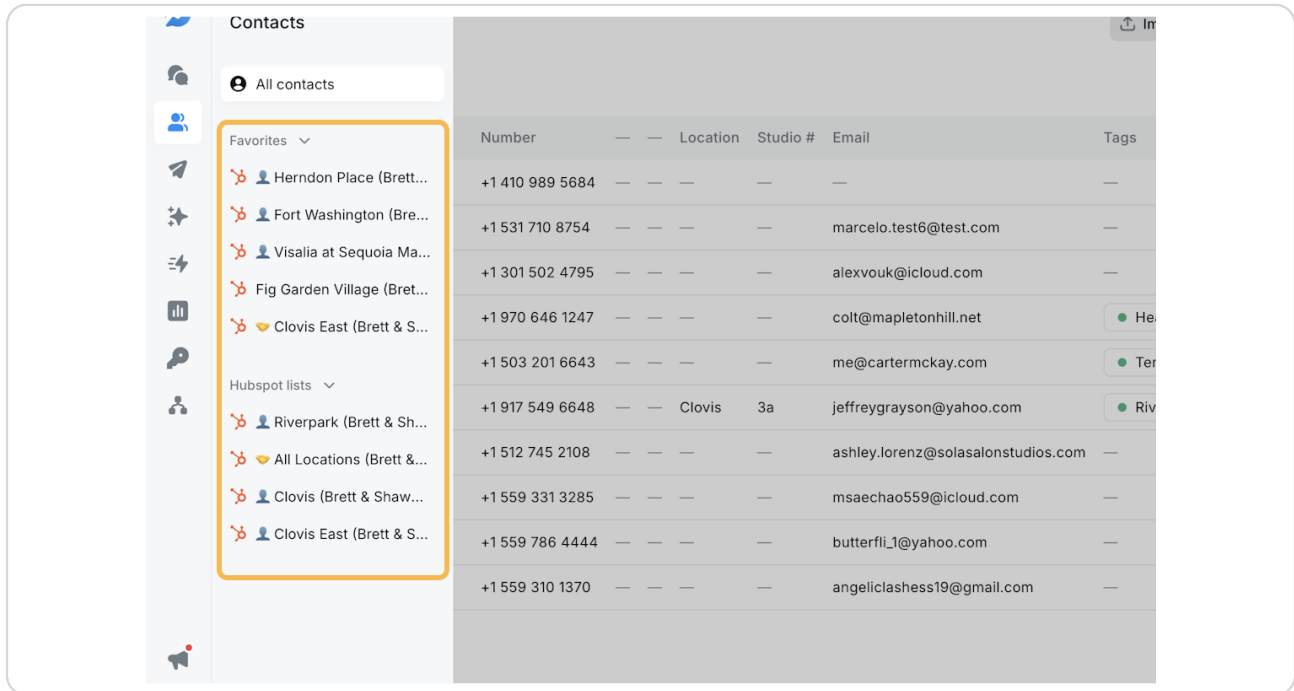
Click on the Menu button (if it is not already showing)



STEP 43

There will be pre-populated segments that are active leads

These will auto-populate from Lists within HubSpot.



The screenshot displays the HubSpot Contacts interface. On the left, a sidebar contains navigation options: 'All contacts', 'Favorites', and 'Hubspot lists'. The 'Favorites' section is highlighted with an orange box and includes the following items:

- Herndon Place (Brett...)
- Fort Washington (Bre...)
- Visalia at Sequoia Ma...
- Fig Garden Village (Bret...)
- Clovis East (Brett & S...)

The 'Hubspot lists' section includes:

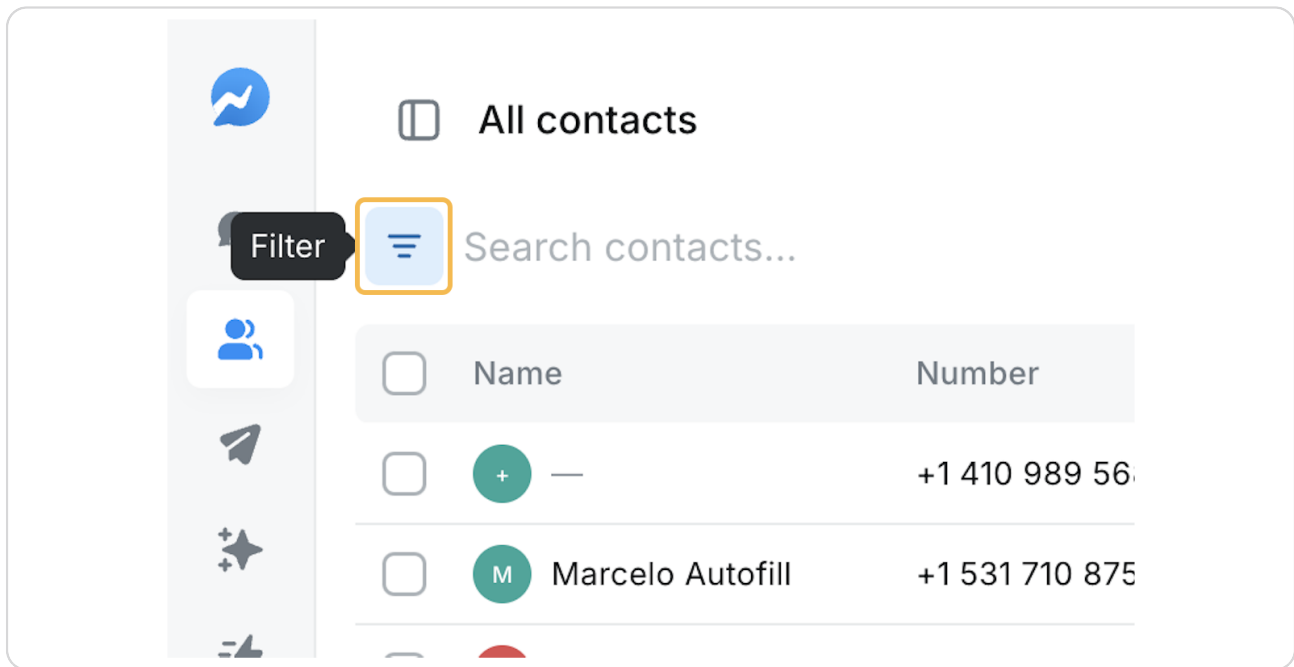
- Riverpark (Brett & Sh...)
- All Locations (Brett &...)
- Clovis (Brett & Shaw...)
- Clovis East (Brett & S...)

The main content area shows a table of contacts with the following columns: Number, Location, Studio #, Email, and Tags. The table contains 10 rows of contact data.

Number	Location	Studio #	Email	Tags
+1 410 989 5684	—	—	—	—
+1 531 710 8754	—	—	marcelo.test6@test.com	—
+1 301 502 4795	—	—	alexvouk@icloud.com	—
+1 970 646 1247	—	—	colt@mapletonhill.net	He
+1 503 201 6643	—	—	me@cartermckay.com	Ter
+1 917 549 6648	Clovis	3a	jeffreygrayson@yahoo.com	Riv
+1 512 745 2108	—	—	ashley.lorenz@solasalonstudios.com	—
+1 559 331 3285	—	—	msaechao559@icloud.com	—
+1 559 786 4444	—	—	butterfli_1@yahoo.com	—
+1 559 310 1370	—	—	angeliclashess19@gmail.com	—

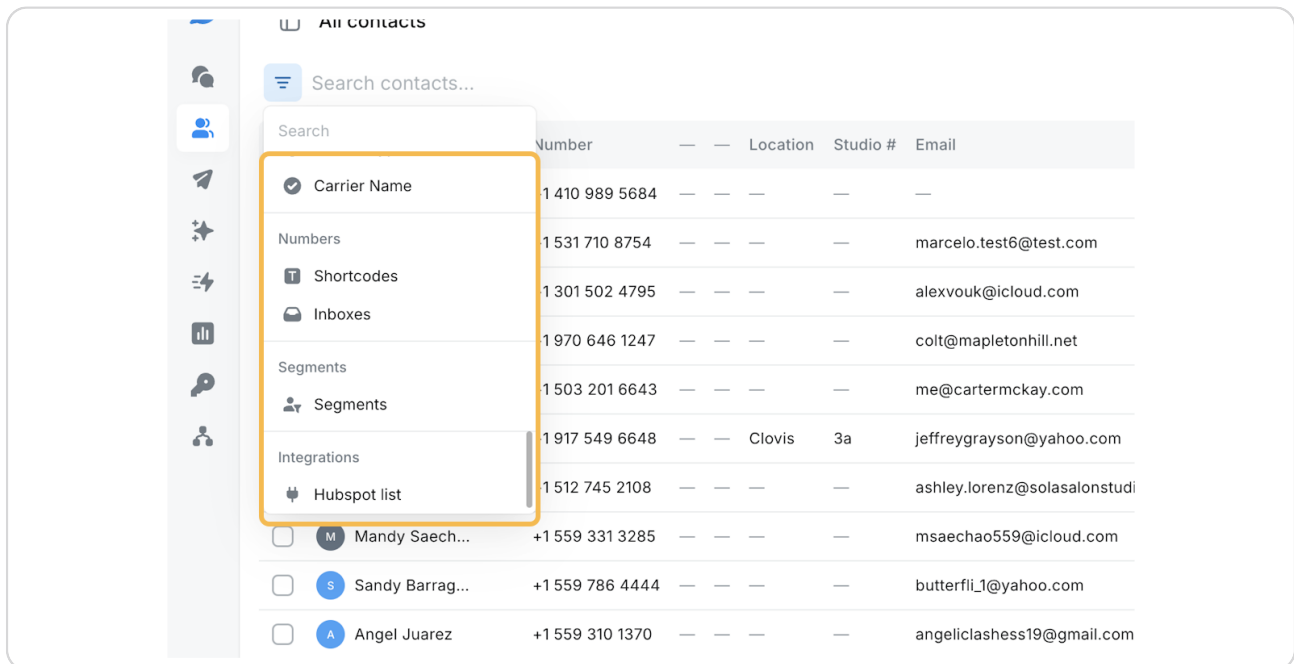
STEP 44

Click the Filter button



STEP 45

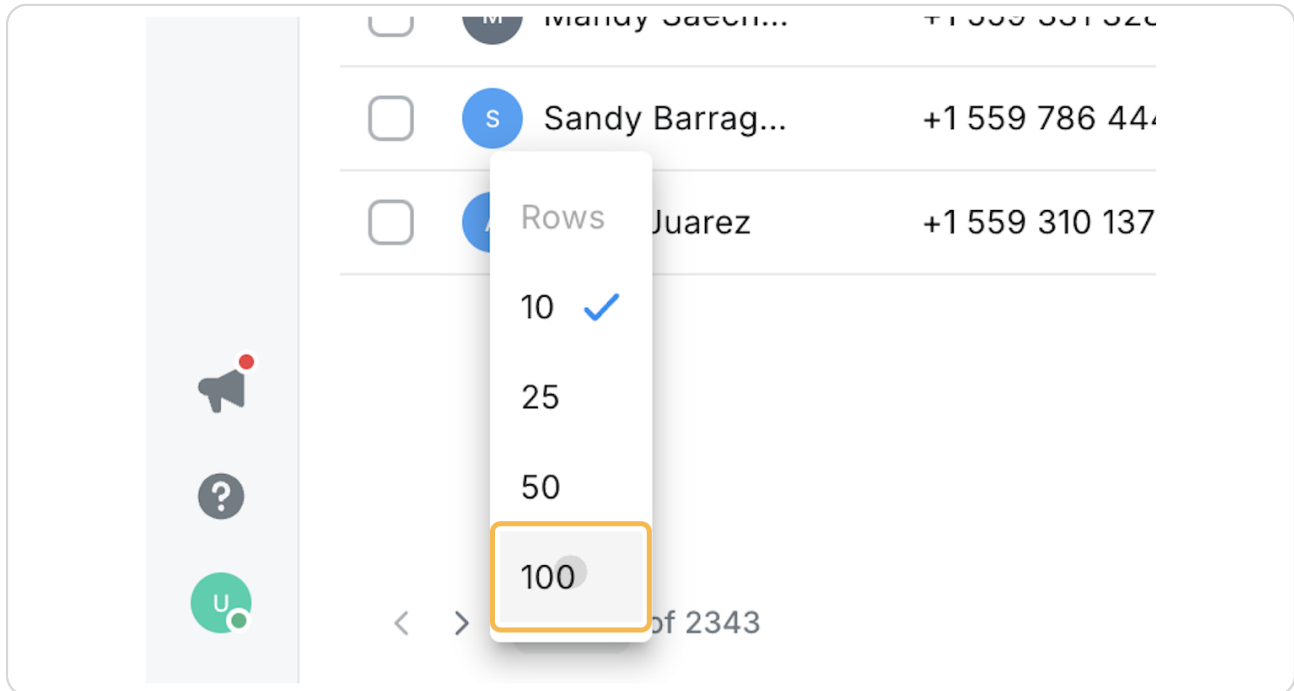
You can filter on a multitude of criteria. This include HubSpot lists



STEP 46

There is an option to expand your view from 10 Contacts up to 100 Contacts

This makes it cleaner, easier, and more efficient to work through any lists.



Broadcasts

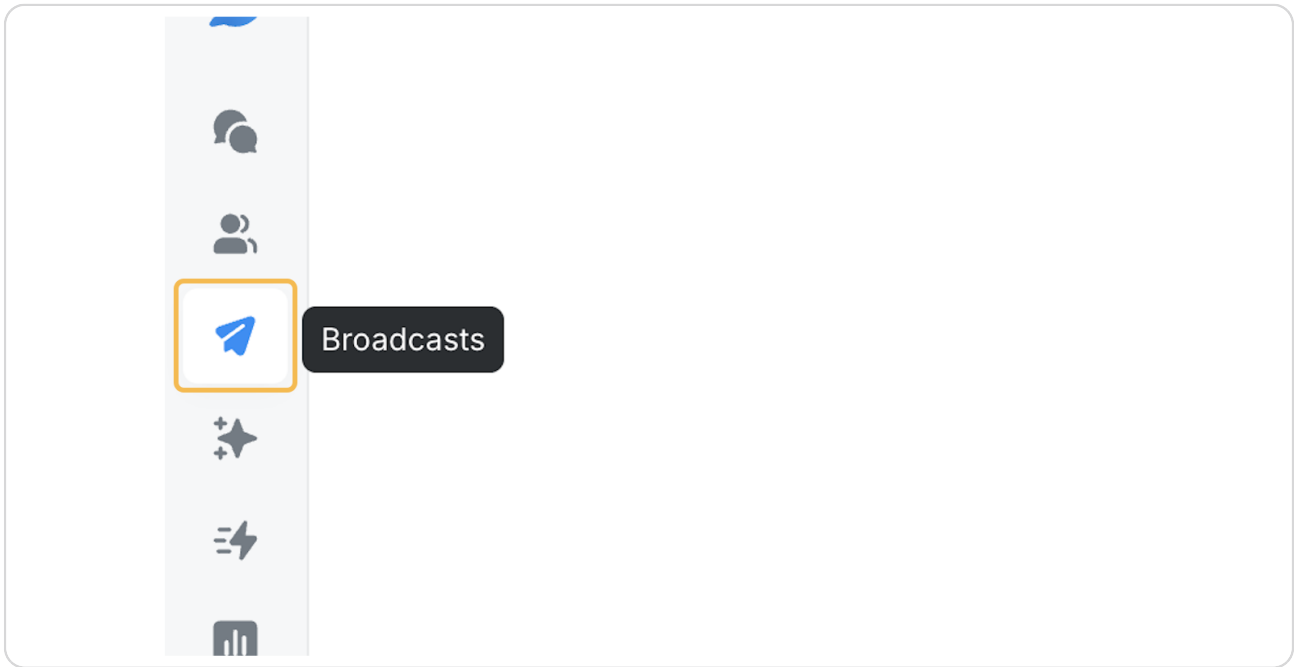
12 Steps

This is a really powerful function if you want to accomplish one to many actions.

- i There are integration enhancements coming down the road that you'll want to look out for. Eventually with this feature you'll be able to quickly message all of your Pros at a specific location (or your leads at a specific location) while you're on the go.

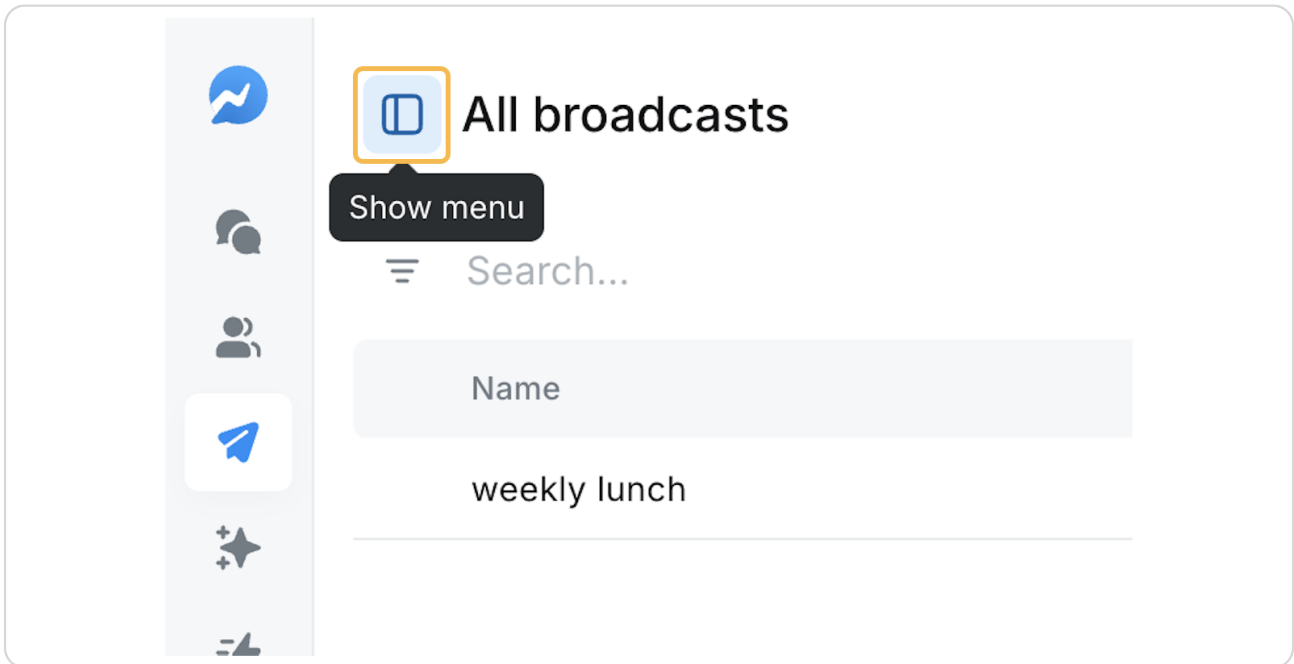
STEP 47

Click on Broadcasts



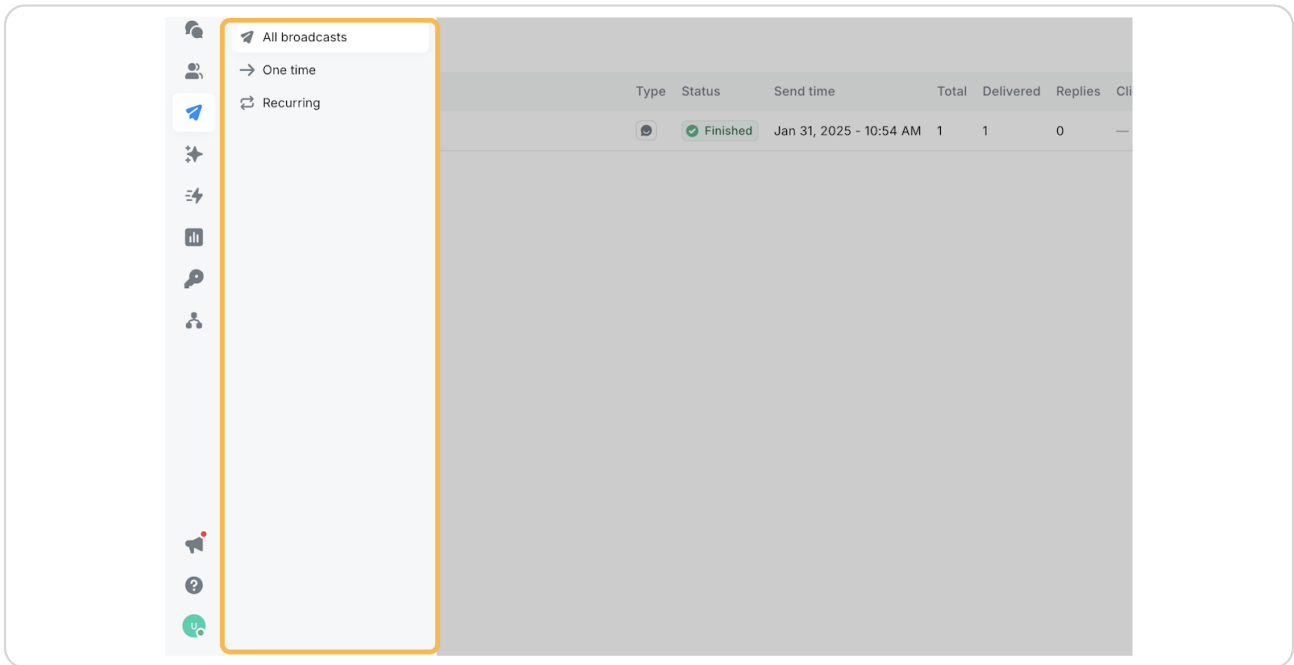
STEP 48

Click on the Menu button (if it is not already open)



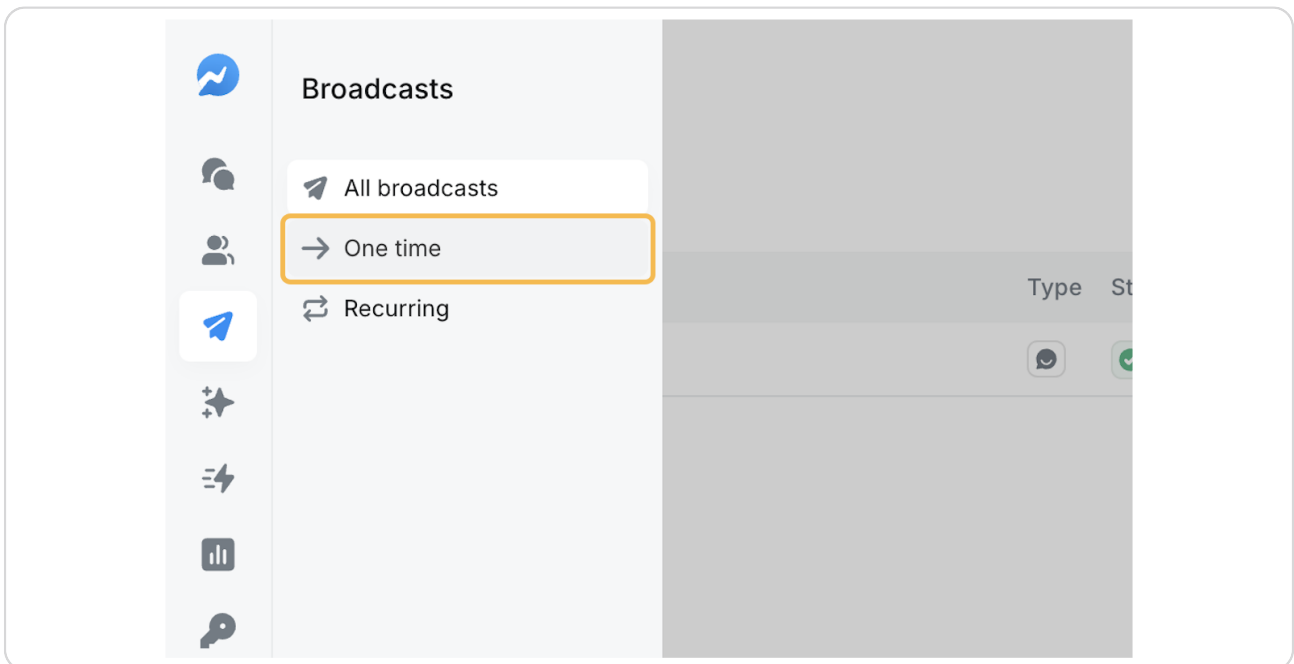
STEP 49

You have the ability to send Broadcasts One time or Recurring



STEP 50

Click on One time



STEP 51

Click on New broadcast

The screenshot shows a user interface for managing broadcasts. At the top right, there is a blue button with a white plus sign and the text '+ New broadcast', which is highlighted with an orange border. Below this is a horizontal line. Underneath the line is a table with a light gray header row and one data row. The header row contains the following columns: 'Total', 'Delivered', 'Replies', 'Clicks', 'Conversion', and a plus sign '+'. The data row contains the following values: 'AM', '1', '1', '0', a dash '—', a dash '—', and a dash '—'.

	Total	Delivered	Replies	Clicks	Conversion	+
AM	1	1	0	—	—	—

STEP 52

Insert a Broadcast name

If you want to set up a new Broadcast, you can set up one Broadcast that is a single text message that goes to multiple Contacts. For example: Sending one message to 1,000 Pros.

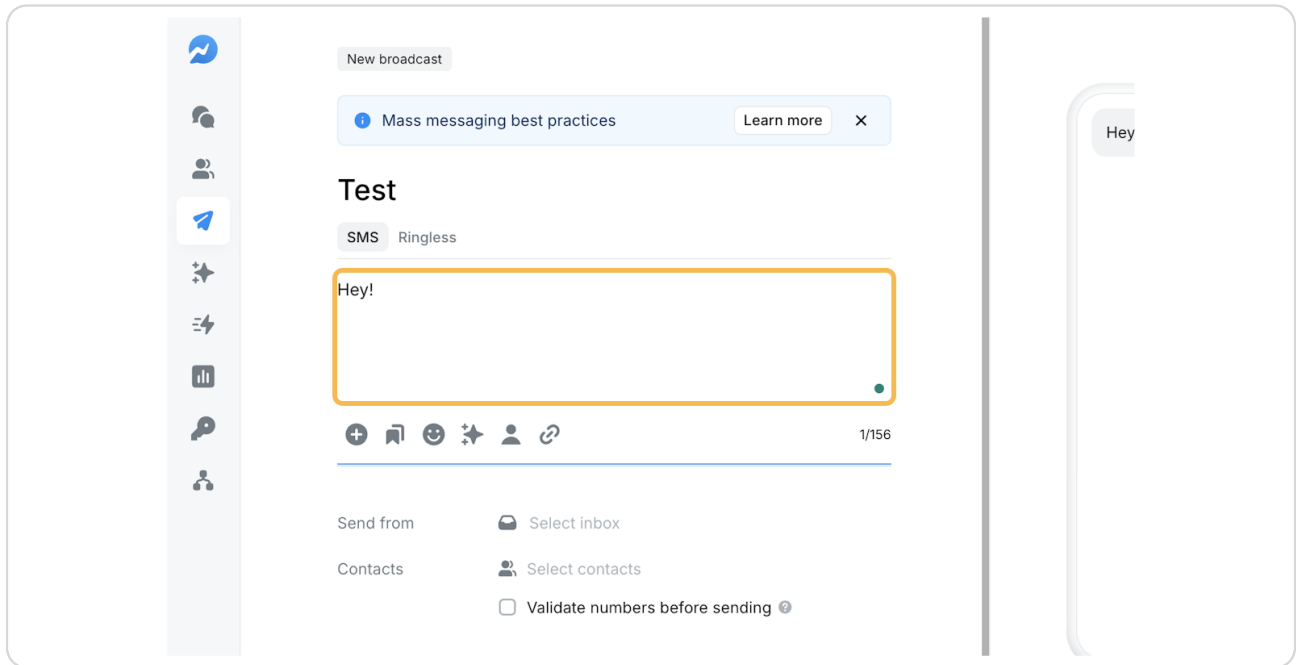
The screenshot shows the 'New broadcast' interface. On the left is a vertical sidebar with various icons. The main area is titled 'New broadcast' and contains the following elements:

- A blue banner with the text 'Mass messaging best practices' and a 'Learn more' link.
- A text input field containing the word 'Test', which is highlighted with a yellow border.
- A 'SMS Ringless' label.
- A 'Write your message...' text area.
- A row of icons for adding attachments, emojis, location, and contacts, with a character count of '0/160'.
- 'Send from' options: 'Select inbox'.
- 'Contacts' options: 'Select contacts' and 'Validate numbers before sending' (unchecked).
- 'Schedule' options: 'Immediately' (selected).
- An 'Advanced' dropdown menu.
- Buttons for 'Review & send', 'Cancel', and a 'Test' button.

The right panel shows a mobile device preview with a 'Write your message...' text area. A blue circular button with a white envelope icon is located at the bottom right of the interface.

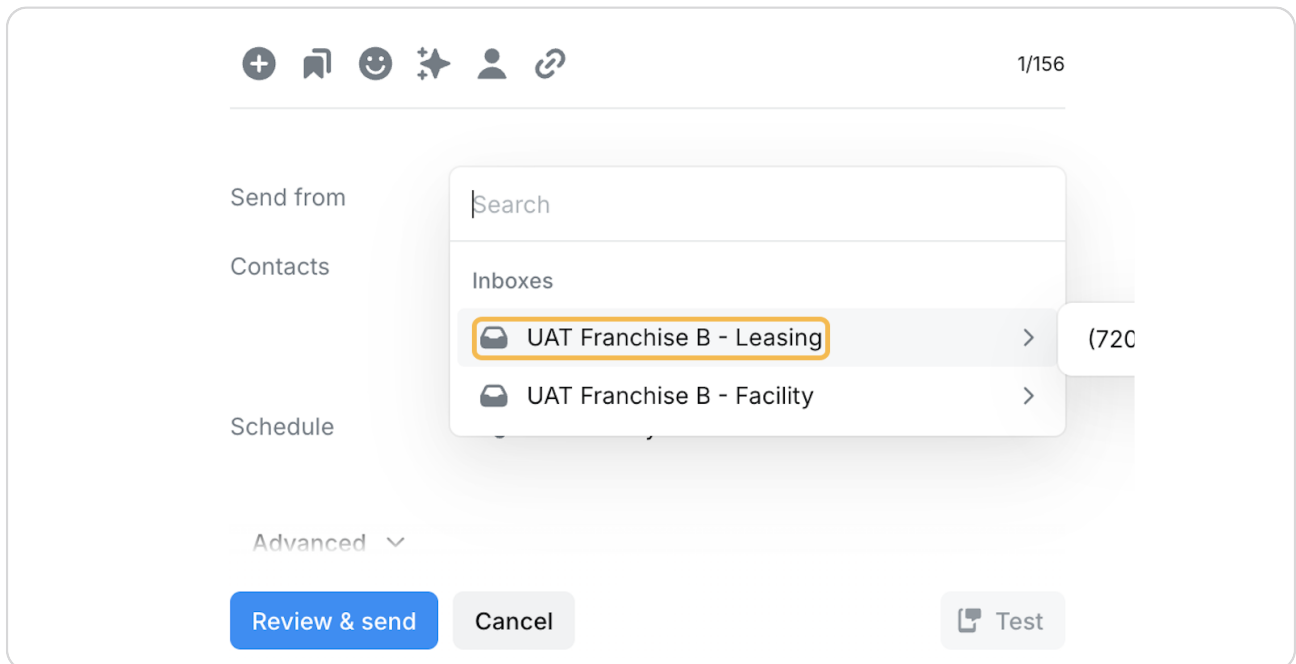
STEP 53

Type in your message



STEP 54

Include where the Broadcast is coming from

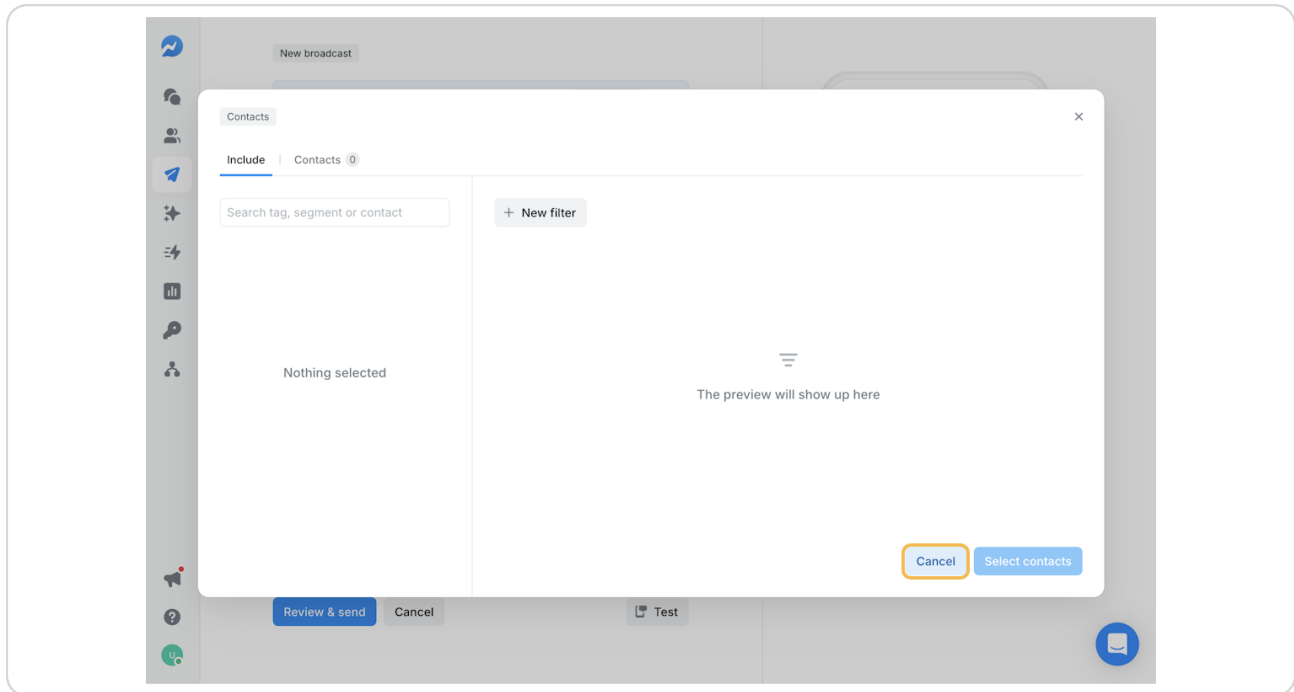


STEP 55

Click on and Select the Contacts that will receive the Broadcast

Note: This is where you can utilize HubSpot Lists to help get broadcasts out to an entire list. You can also add Tags to all of your Contacts to segment them and filter on the Tags that you create.


That way if you want to message just the hairstylists in your Contact list, you can pull those Contacts in easily.




STEP 56


Choose when you would like to send the Broadcast

i Based on the selected number, you can send the message to up to 2,000 contacts per broadcast.

Send from  UAT Franchise B - ... (720) 649-5900

Contacts  Select contacts

Validate numbers before sending **?**


Schedule  **Immediately**


Advanced **▼**

Review & send **Cancel** **Test**

STEP 57


Click on Send later

 UAT Franchise B - ... (720) 649-5900

 Select contacts

Validate numbers before sending **?**

Send immediately **Send later** Recurring

 Advanced scheduling


Cancel **Test**


STEP 58


There is the ability to Use contact timezone

Note: If you use this function, it is based off of area code. There is no guarantee that the call won't wake the Pro up if the number is for New York, but they are visiting LA.

i Based on the selected number, you can send the message to up to 2,000 contacts per broadcast.



Send from  UAT Franchise B - ... · (720) 649-5900


Contacts  Select contacts


Validate numbers before sending 


Schedule

Send immediately **Send later** Recurring

Advanced   Feb 27, 2025

 6:30 PM

Review & schedule  Use contact timezone

 Advanced scheduling

