

Sola Salon Studios - How to Update Information on a Contact in HubSpot to Appear in SalesMsg

If a Contact is missing information in SalesMsg, you'll need to update their record in HubSpot and ensure the correct properties are also reflected in SalesMsg.

This guide walks you through how to update a Contact in HubSpot so the information syncs and displays properly in SalesMsg.

18 Steps [View most recent version](#) 

Created by

Doug Davidoff

Creation Date

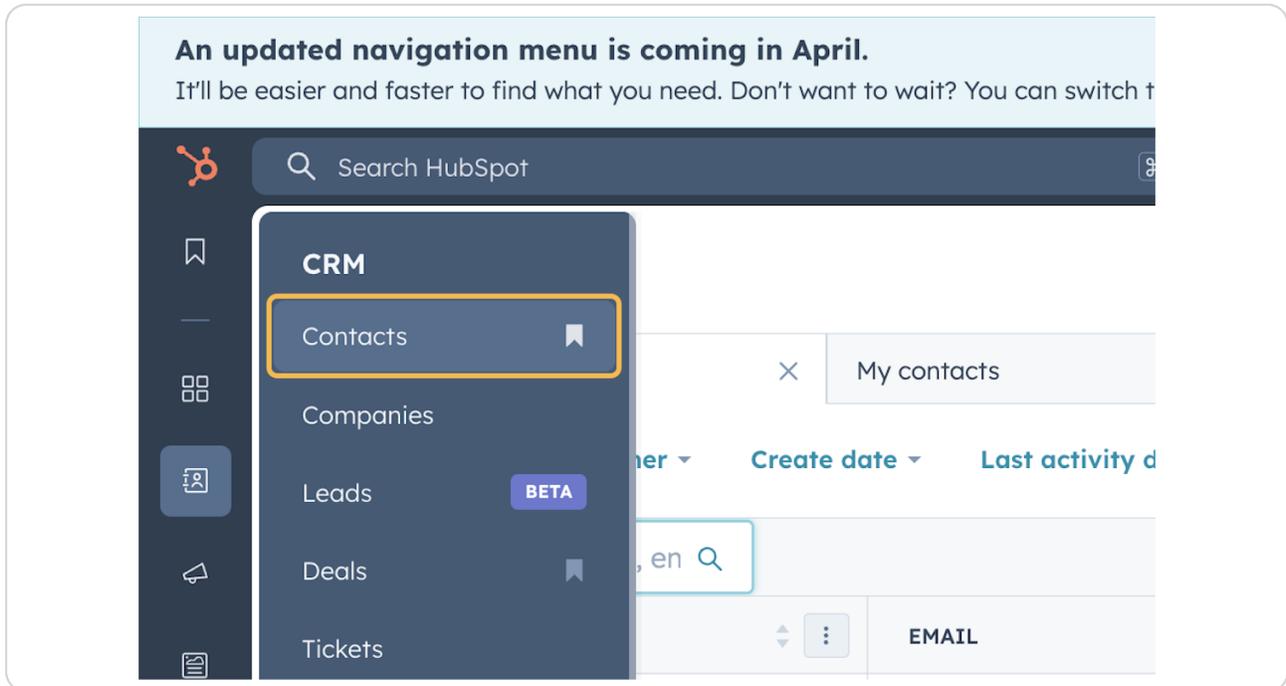
Apr 11, 2025

Last Updated

Apr 11, 2025

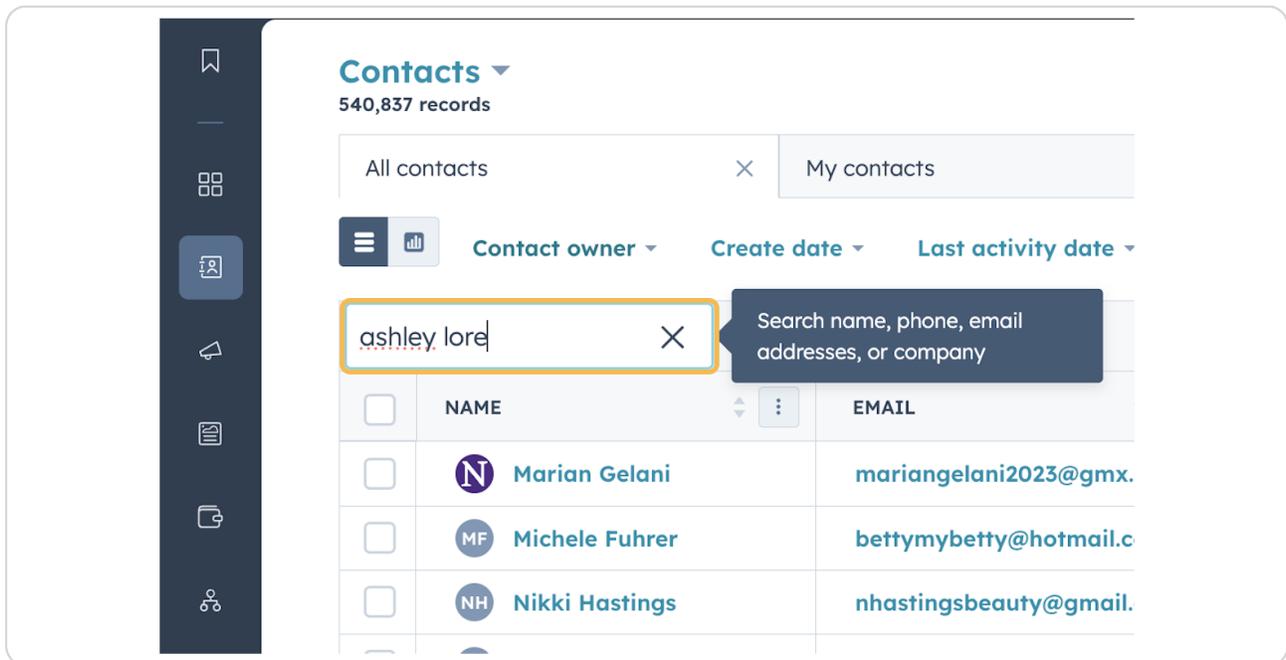
STEP 1

Navigate to the CRM section and Click on Contacts



STEP 2

Search for the Contact that needs updated



Contacts ▾
540,837 records

All contacts × My contacts

☰ ☰ Contact owner ▾ Create date ▾ Last activity date ▾

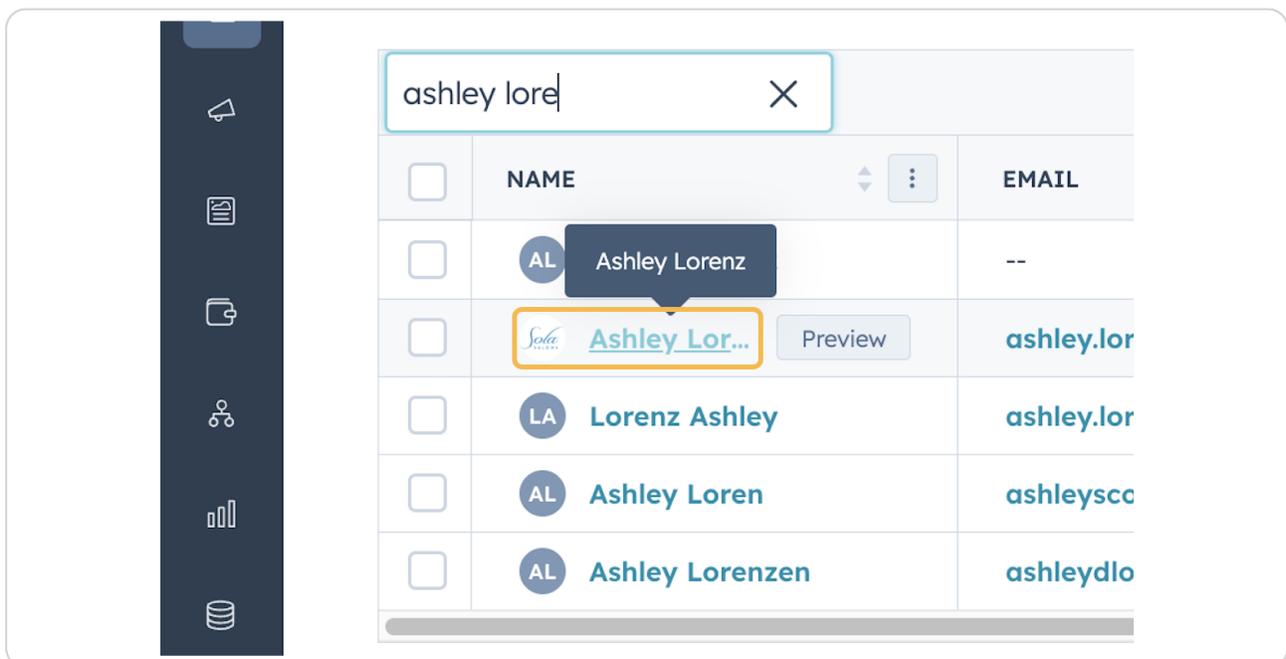
ashley lore ×

Search name, phone, email addresses, or company

<input type="checkbox"/>	NAME	EMAIL
<input type="checkbox"/>	Marian Gelani	mariangelani2023@gmx.
<input type="checkbox"/>	Michele Fuhrer	bettymybetty@hotmail.c
<input type="checkbox"/>	Nikki Hastings	nhastingsbeauty@gmail.

STEP 3

Click on the Contact name to open the Contact record



ashley lore ×

<input type="checkbox"/>	NAME	EMAIL
<input type="checkbox"/>	Ashley Lorenz	--
<input type="checkbox"/>	Ashley Lor... Preview	ashley.lor
<input type="checkbox"/>	Lorenz Ashley	ashley.lor
<input type="checkbox"/>	Ashley Loren	ashleyscc
<input type="checkbox"/>	Ashley Lorenzen	ashleydlo

STEP 4

Click on the Location Name

The screenshot shows a user profile page for Ashley Lorenz. On the left is a dark sidebar with navigation icons. The main content area has a header 'About this cont...' with 'Actions' and a settings gear. Below are fields for First name (Ashley), Last name (Lorenz), Location Name (empty, highlighted with a yellow box), Phone number (512-745-2108), Email (ashley.lorenz@solasalonstudios.com), and Marketing SMS Opted in. On the right, there are sections for 'CREATE DATE' (09/09/2024 7:44 AM HST), 'LAST ACTIVITY DATE' (01/24/2025 8:51 AM HST), 'Recent activities' with a search bar, a filter for '5 activities', and an 'Inbound email from' section with the subject 'Re: [EXTERNAL] Sorry!'.

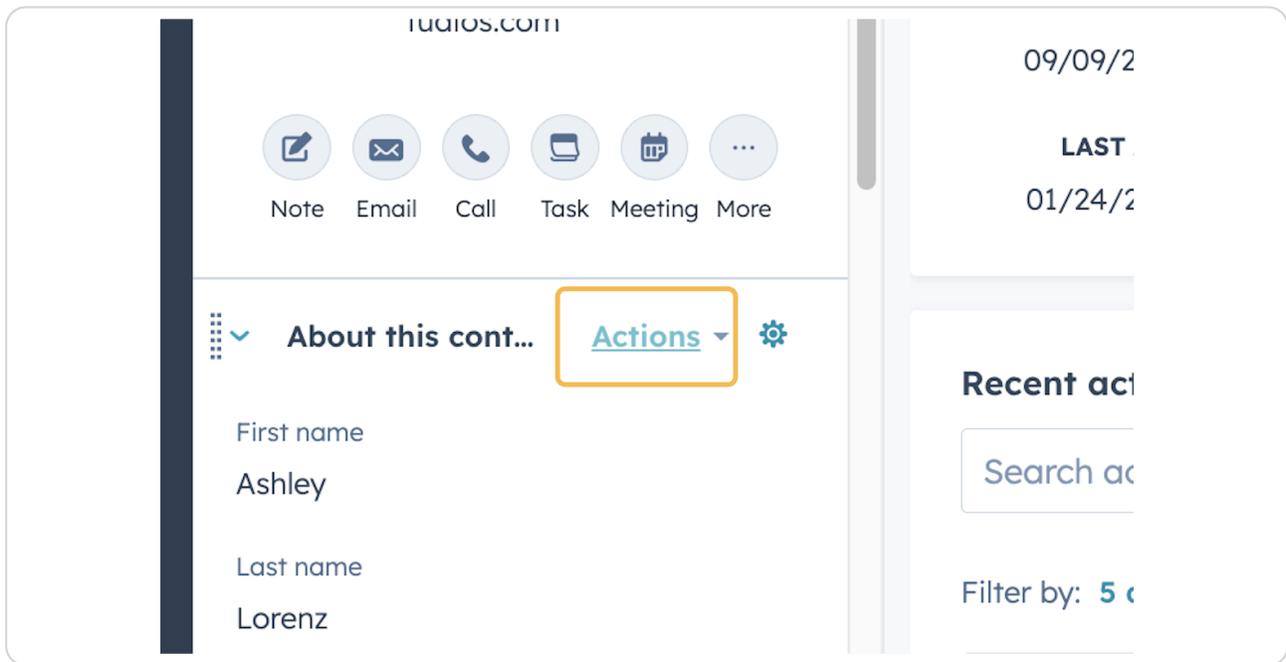
STEP 5

Add the location

This screenshot is identical to the one in Step 4, but the 'Location Name' field now contains the text 'Annapolis'.

STEP 6

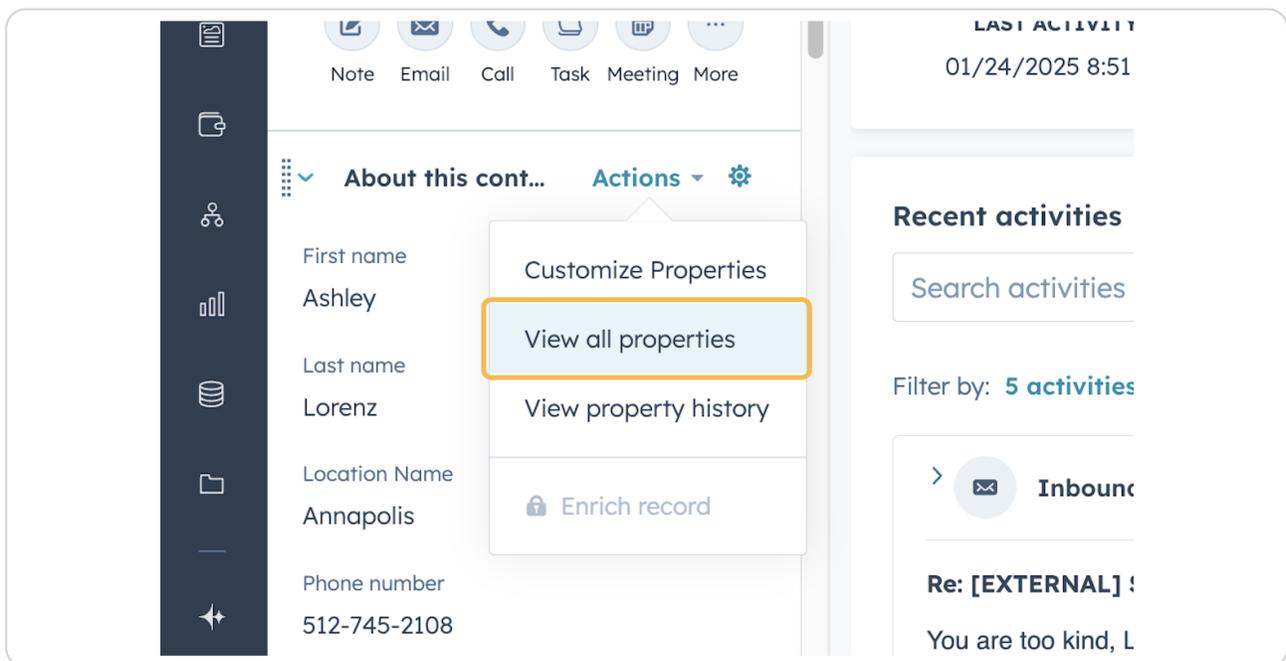
If you do not see the field you need to update, Click on Actions



The screenshot shows the LIFT CRM interface for a contact record. At the top, the domain 'LIFTOS.COM' is visible. Below it are icons for Note, Email, Call, Task, Meeting, and More. The contact details are: First name: Ashley, Last name: Lorenz. The 'Actions' dropdown menu is highlighted with a yellow box, showing options for Note, Email, Call, Task, Meeting, and More. The right sidebar shows the date '09/09/2025' and 'LAST ACTIVITY' on '01/24/2025'. Below that is a 'Recent activities' section with a search bar and a filter set to '5 activities'.

STEP 7

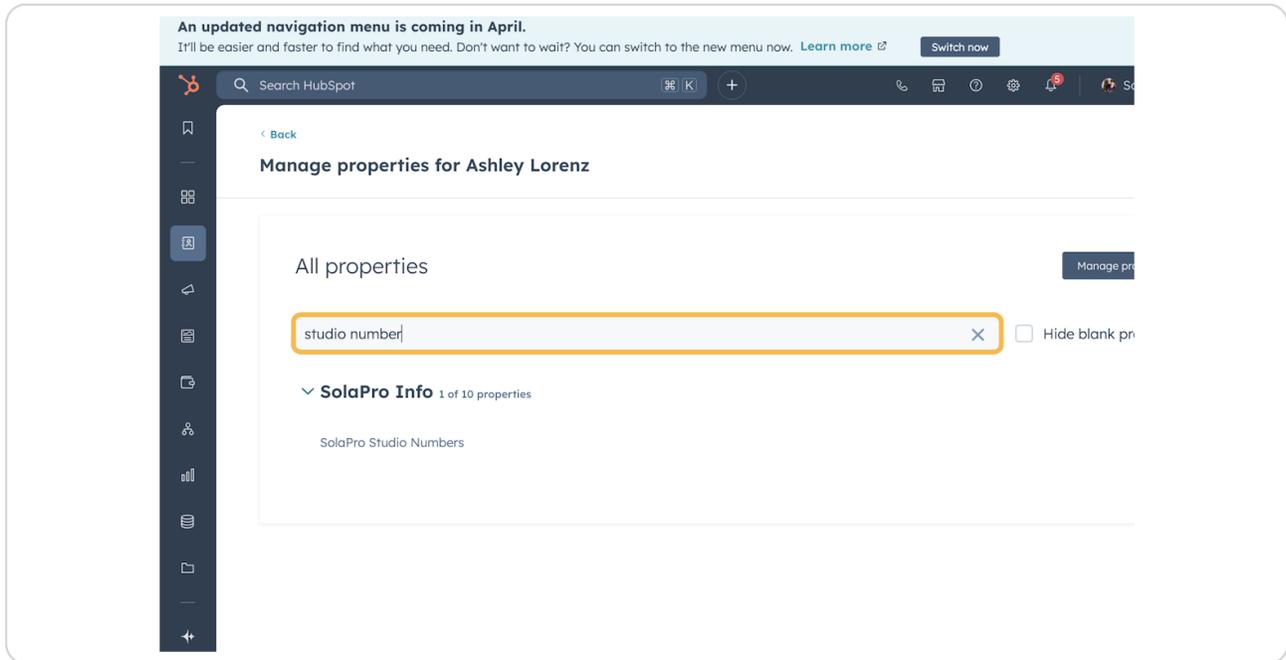
Click on View all properties



The screenshot shows the LIFT CRM interface for a contact record. The contact details are: First name: Ashley, Last name: Lorenz, Location Name: Annapolis, Phone number: 512-745-2108. The 'Actions' dropdown menu is open, and the 'View all properties' option is highlighted with a yellow box. Other options in the menu include 'Customize Properties', 'View property history', and 'Enrich record'. The right sidebar shows the date '01/24/2025 8:51' and 'LAST ACTIVITY'. Below that is a 'Recent activities' section with a search bar and a filter set to '5 activities'. At the bottom, there is an 'Inbound' email notification with the subject 'Re: [EXTERNAL]!' and the body text 'You are too kind, L'.

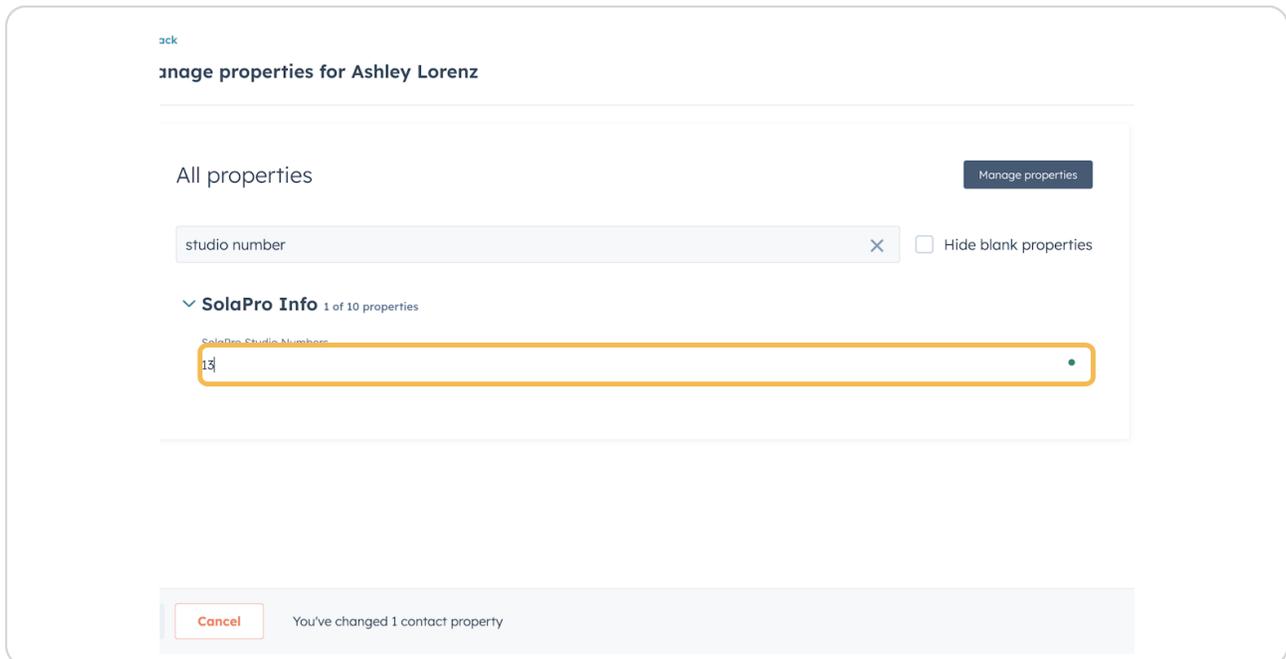
STEP 8

Search for the property



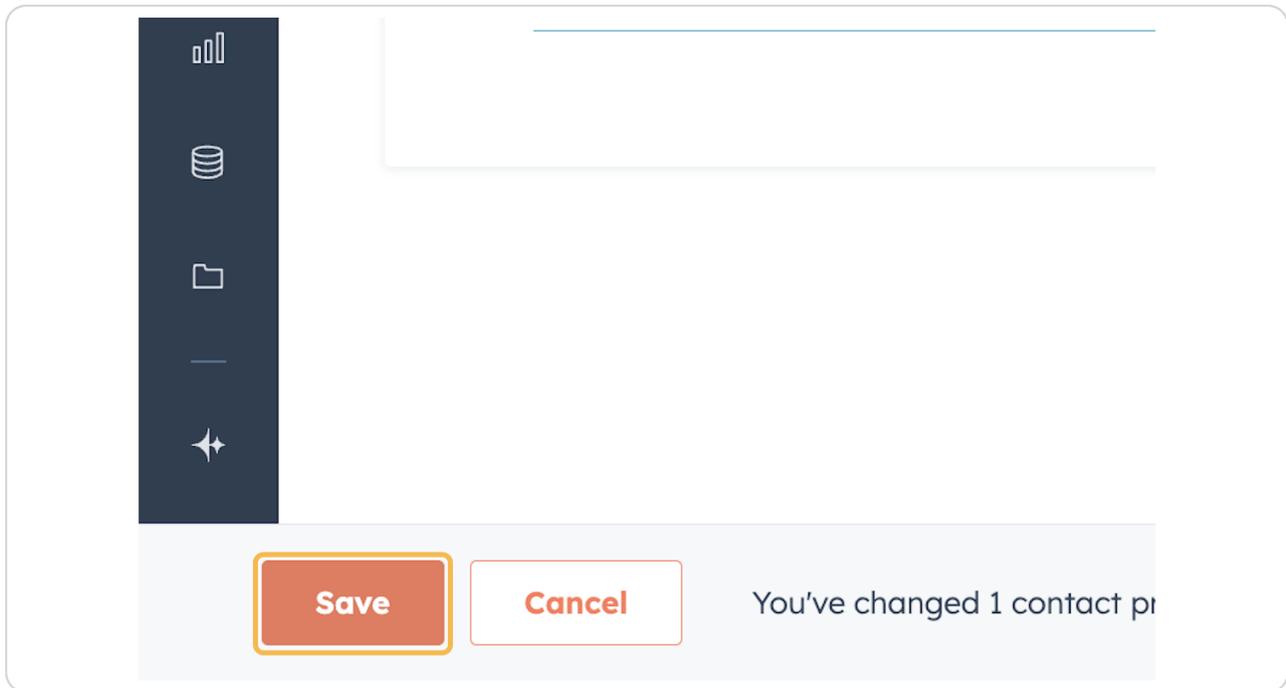
STEP 9

Edit and update the property



STEP 10

Click on Save



Location and Studio Number were used as examples. This also applies to other information you want to appear in SalesMsg.

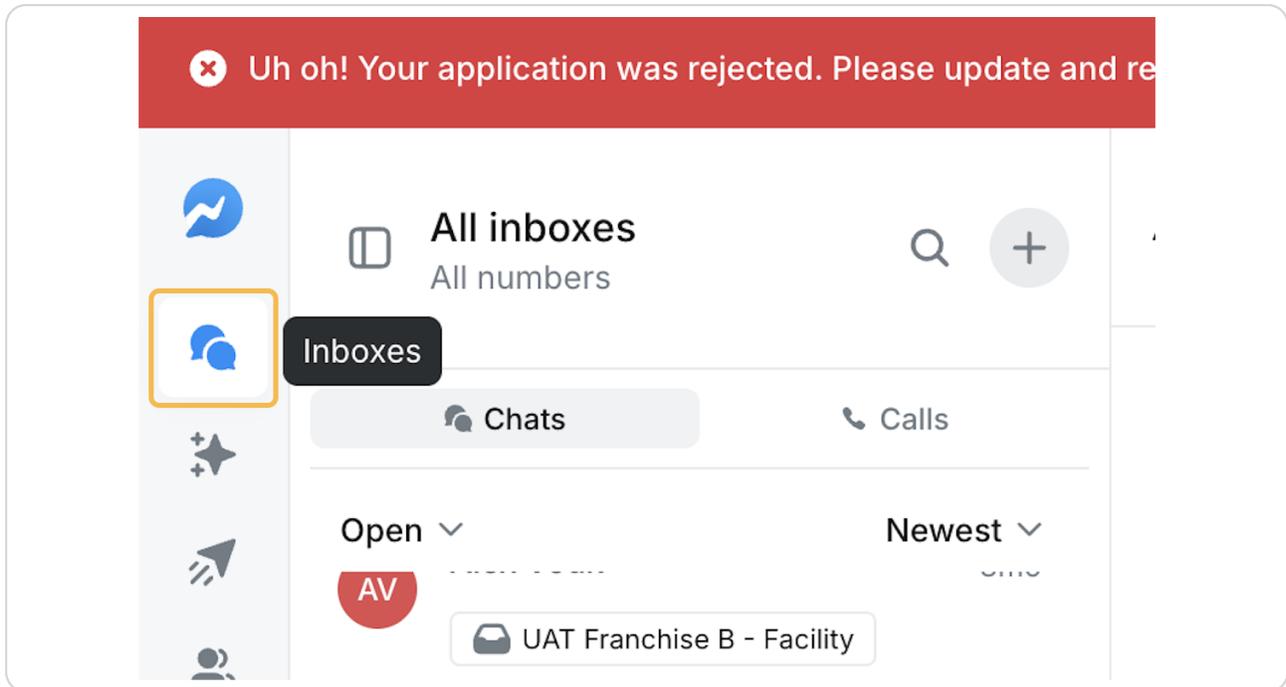
Switch into SalesMsg

8 Steps

STEP 11

Click on Conversations

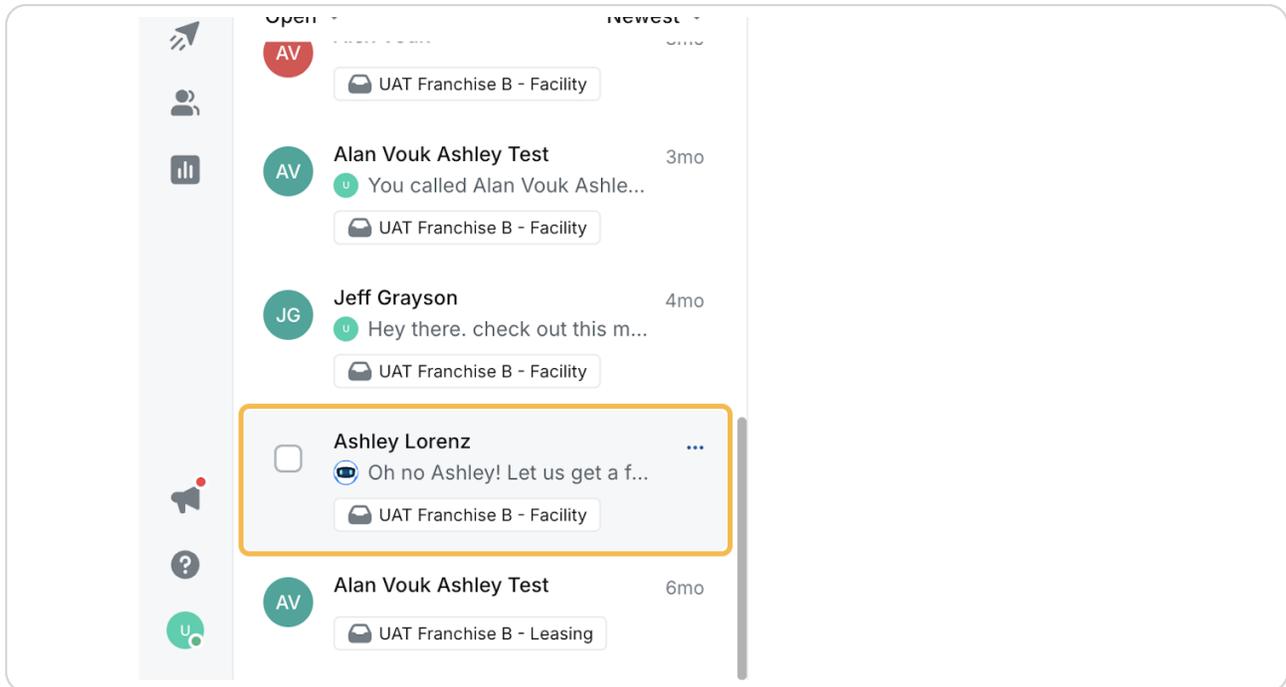
Note: You can add properties to the Contact through Contacts as well if you do not have a Conversation going with the Contact yet.



STEP 12

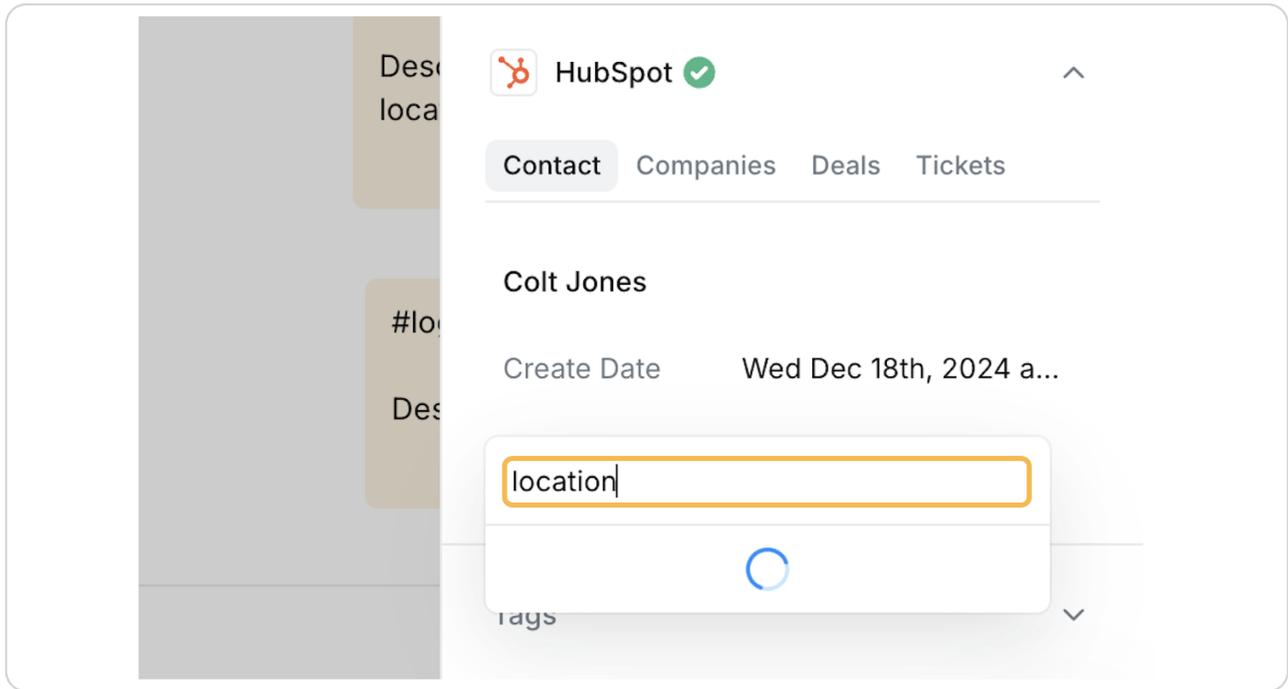
Click on the Contact Conversation

Note: If a Conversation has not started yet, you can add this information through the Contact section.



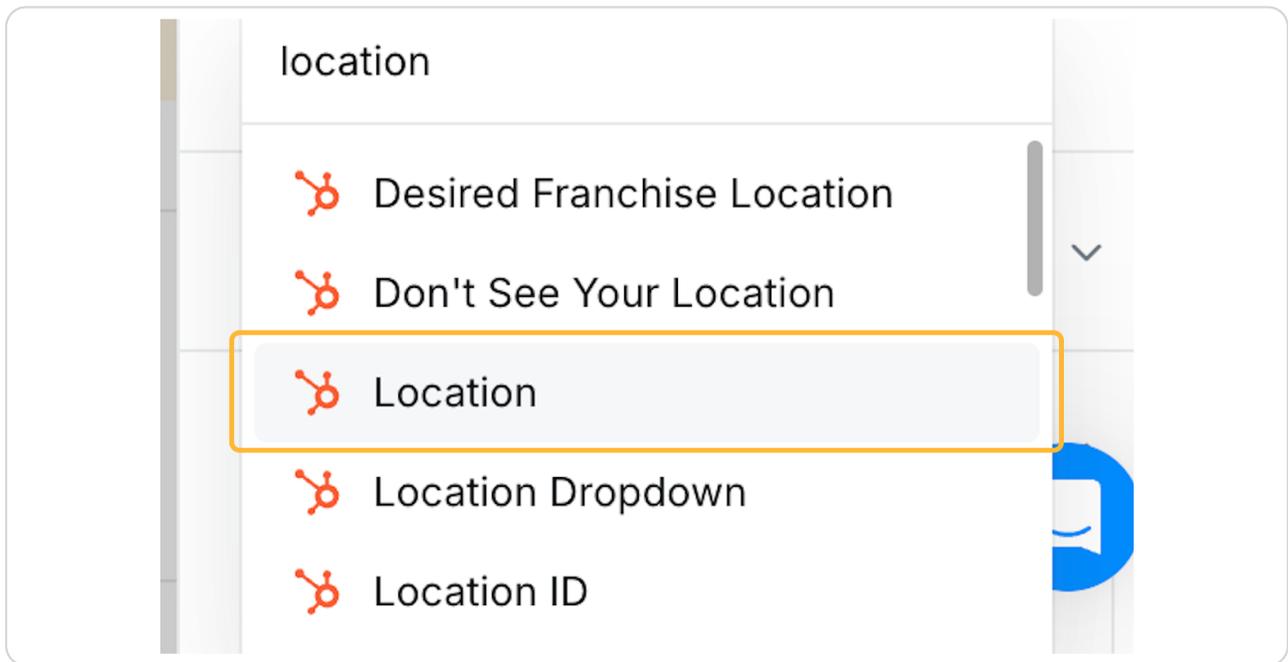
STEP 13

In the HubSpot section of the Contact Details to the right of the Conversation, Click Add Property and Search for Location



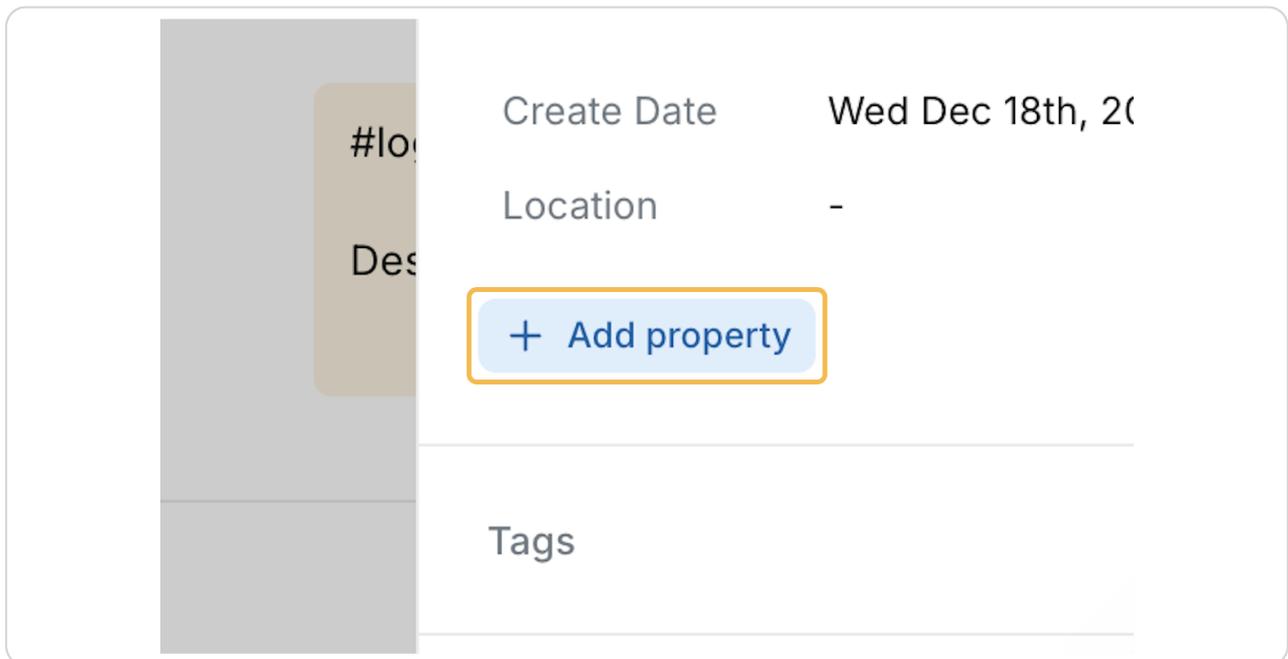
STEP 14

Click on Location



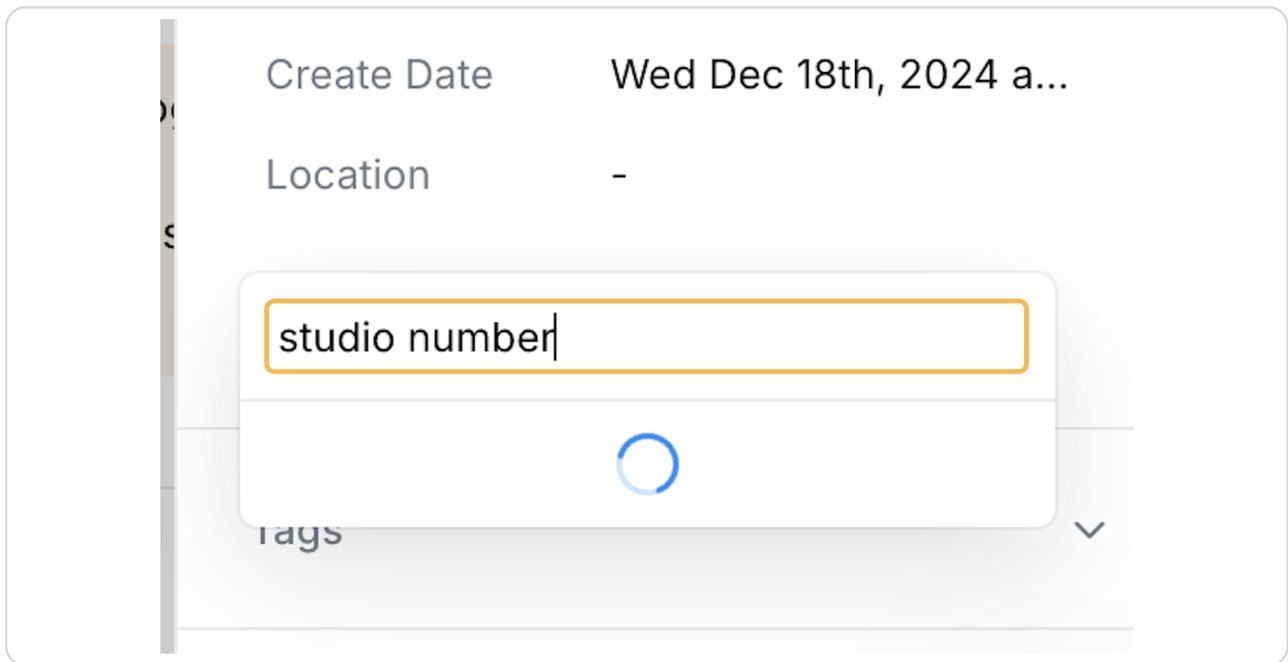
STEP 15

Click on Add property



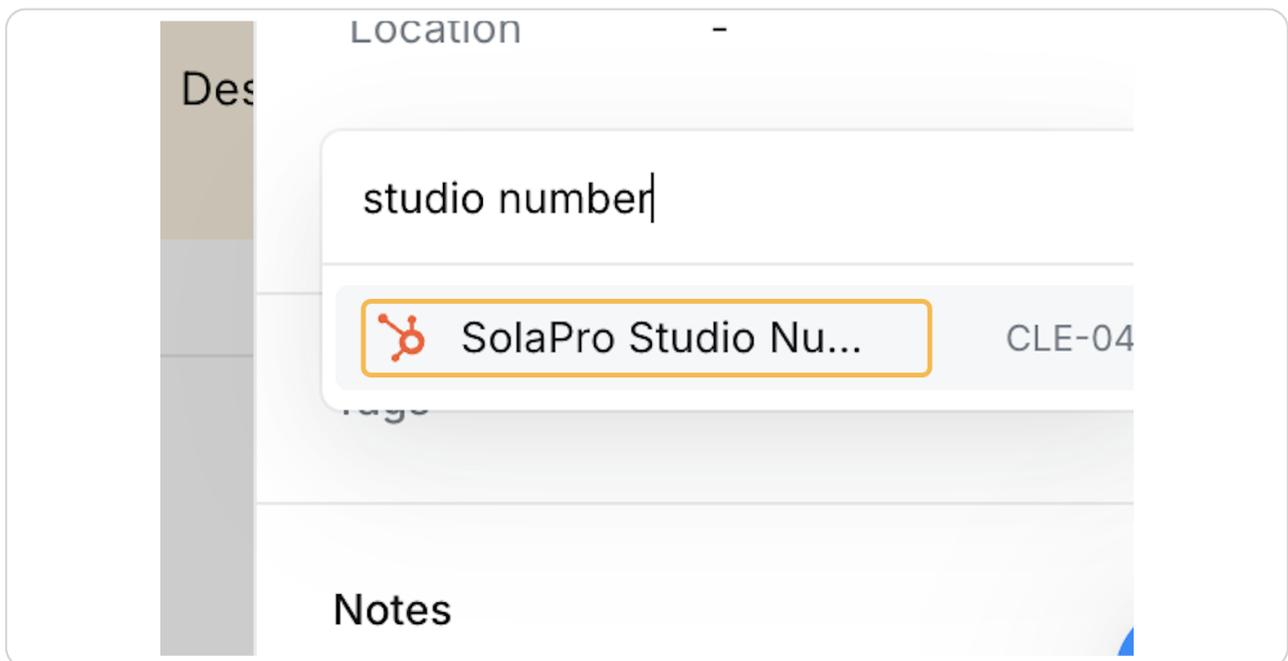
STEP 16

Search for Studio Number



STEP 17

Click on SolaPro Studio Number(s)



STEP 18

The properties you searched for and added will appear in the HubSpot section of the Contact Details

