Sola Salon Studios - SalesMsg Basic Mobile Setup

SalesMsg is a messaging and calling app that is integrated with HubSpot Plus+. This app is like WhatsApp, but in this case it's integrated with HubSpot so that message activities are connected. SalesMsg is a shared inbox so multiple people can see messages coming through.

This guide will walk you through basic mobile SalesMsg setup including:

- Downloading the App
- Login and Initial Setup
- Basic Navigation
- Conversations
  - Internal Notes
  - Saved Replies
  - Viewing Contact Info
  - Tricks and Helpful Hints
- Calls
- Contacts

49 Steps   [View most recent version]

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Do's and Don't's of SalesMsg:

DO:
- Do allow access to your Mic during setup so you can make calls.
- Do update contacts in HubSpot with Valide Phone Numbers.
- Do set up your Saved Replies for quicker messaging.

DON'T:
- Don't sync your phone contacts.
- Don't update contacts in SalesMsg.

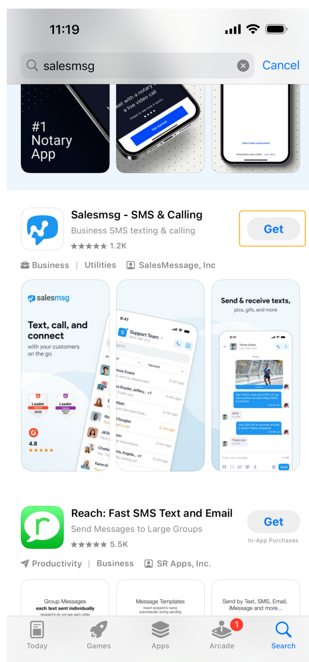
Download the Mobile App

2 Steps

Note: This guide was done on an iPhone. Android users may see things a bit differently.

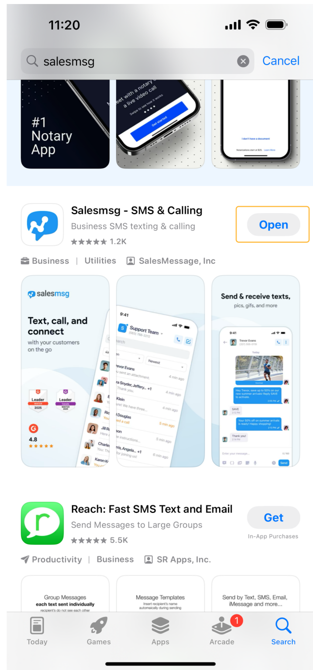
STEP 1

Go into your mobile apps, Search for SalesMsg and Click Get



STEP 2

Click Open or Find the app on your phone and open it up

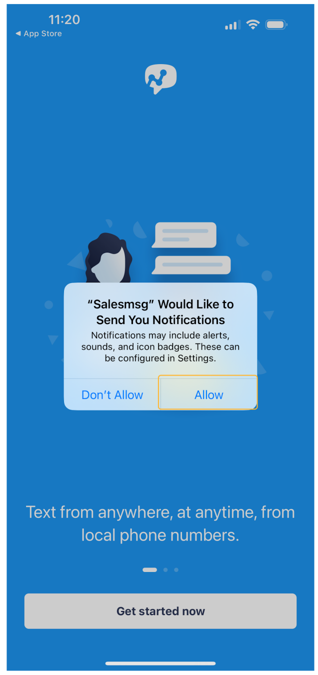


Login and Initial Setup in SalesMsg

7 Steps

STEP 3

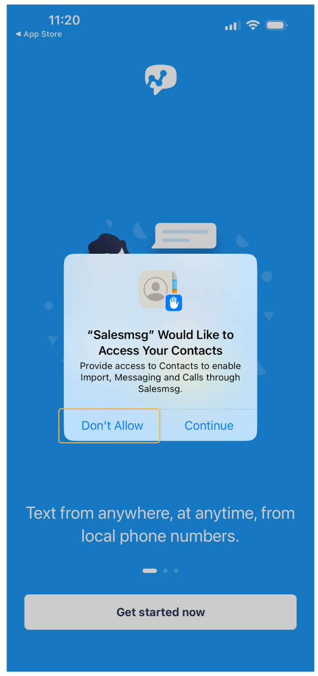
You'll be prompted with a couple of questions. The first is whether you'd like to receive notifications. Click Allow



STEP 4

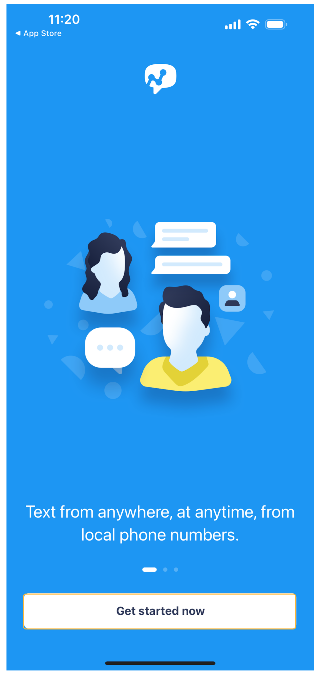
The second question you'll need to answer is whether you'd like to give access to your contacts. Click Don't Allow

Note: We don't want contacts coming in from your phone. Contacts will be coming in through HubSpot.



STEP 5

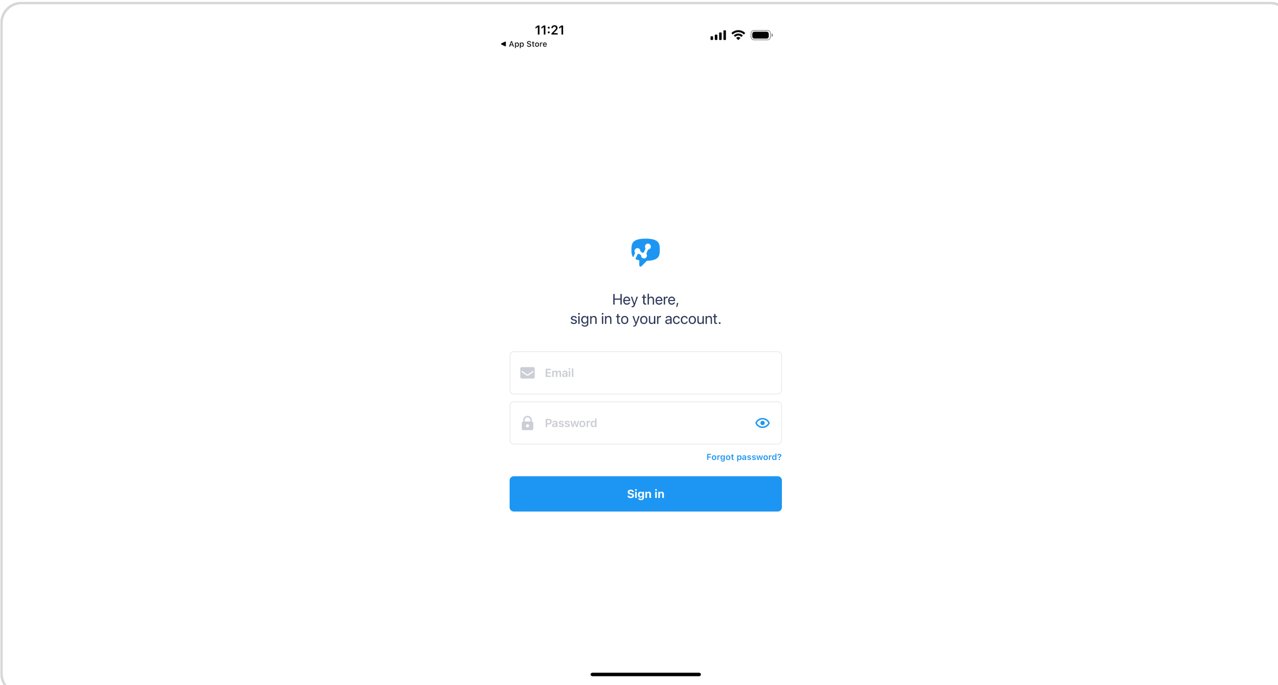
Click Get started now



STEP 6

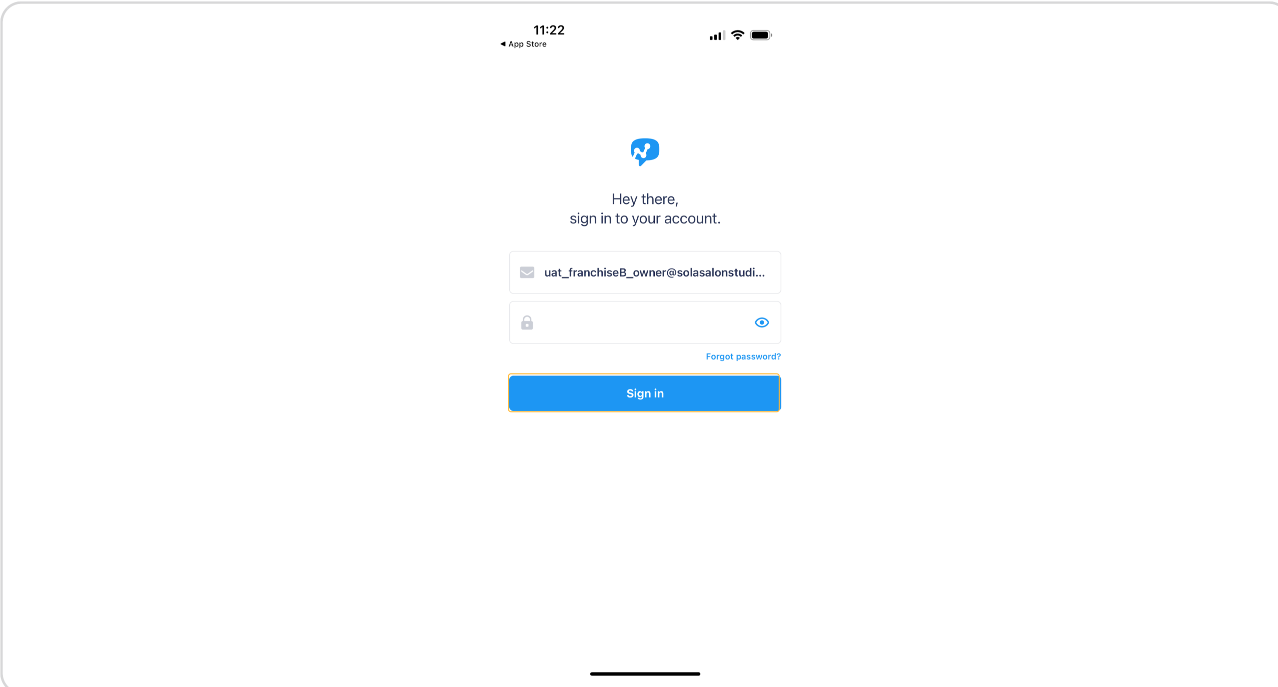
You'll be prompted to log in

Note: If you do not have the ability to log in yet, wait until you get an invite email to create your account.



STEP 7

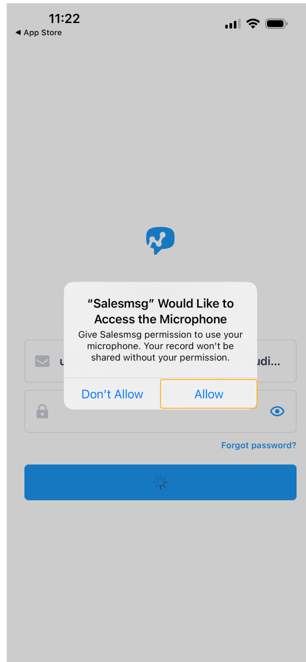
Include your credentials and Click Sign in



STEP 8

You'll be prompted to allow access to the microphone. Click Allow

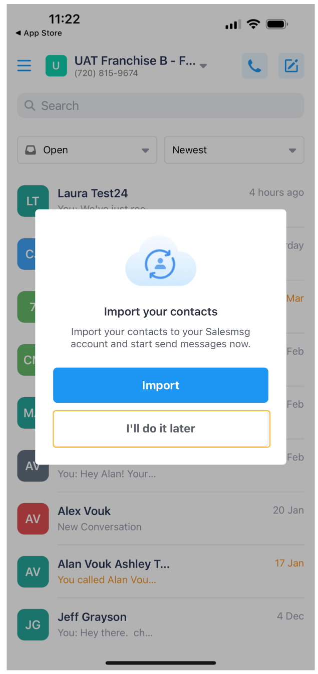
You will need to allow access to make calls.



STEP 9

When prompted to Import your contacts, Click I'll do it later

You do not want to sync your contacts. If you do, all of your contacts will be visible across the shared inbox.



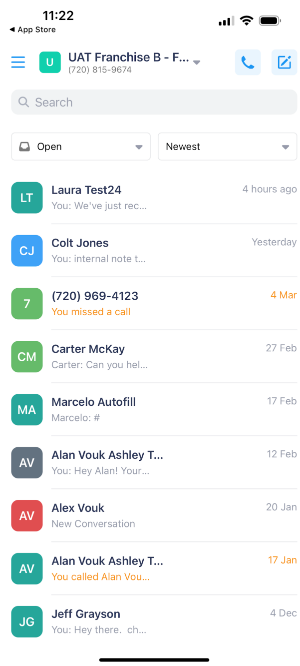
Basic SalesMsg Navigation

3 Steps

STEP 10

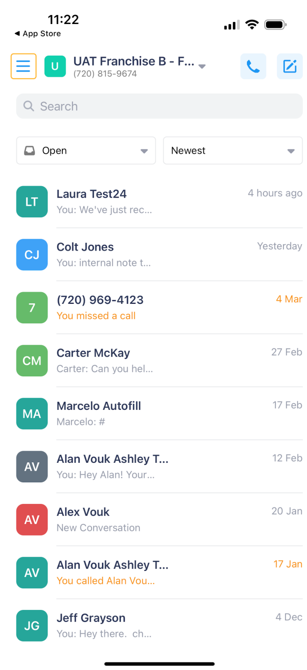
Your home page within SalesMsg will be your conversation history

Note: If you have not sent any messages yet, you will not see anything on this screen.



STEP 11

All navigation will be through the hamburger menu in the top left-hand corner of your screen



STEP 12

From here you'll see Conversations, Calls, and Contacts. Click on Conversations

These will be the three areas of most benefit to you to keep in touch with Pros.

Conversations

7 Steps

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

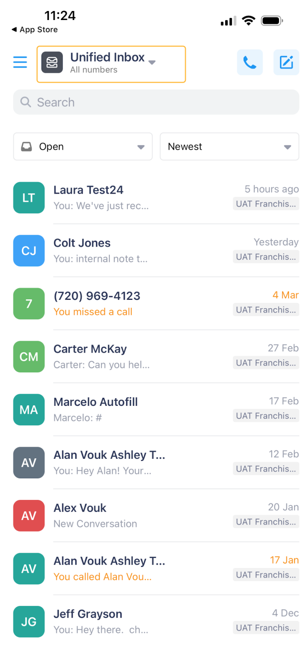
Handy Features in Conversations:

- Internal notes (yellow sticky) only show in Salesmsg. Leads will not see anything that is a yellow message.
- Saved Replies save time by saving common messages.
- Shared inbox for many members to collaborate on.

STEP 13

If you have multiple inboxes, you'll be able to switch back and forth between them by clicking on the Inbox at the top. The Unified Inbox will thread together all your conversations from all inboxes. To go back to your main inbox, Click the Unified Inbox dropdown

Note: Most will only have one inbox.

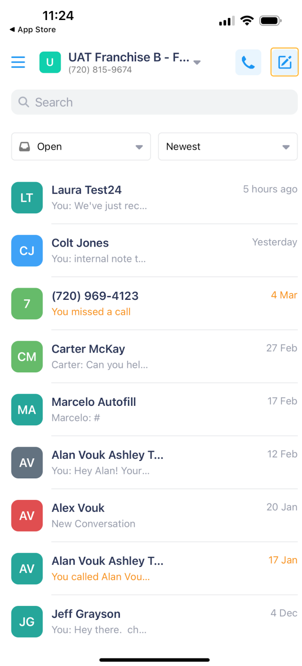


STEP 14

Click on your main inbox

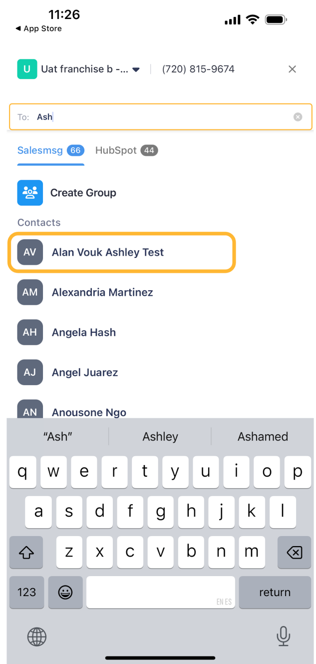
STEP 15

To start a new conversation, Click the Compose button in the top right-hand corner



STEP 16

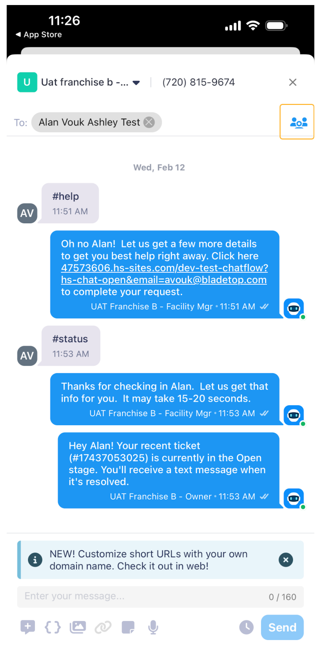
Search for and Select your Contact



STEP 17

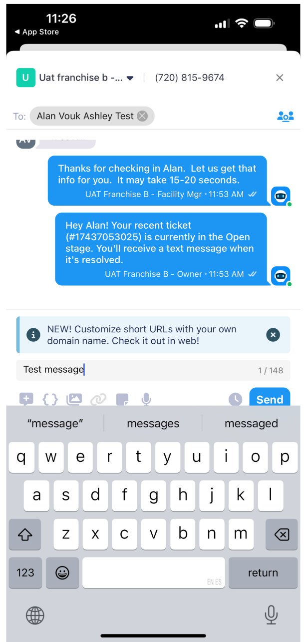
You'll be able to see the phone number you're sending the message from and who you're sending the message to

If you want to add more people to the conversation, Click the group button next to the To: section.



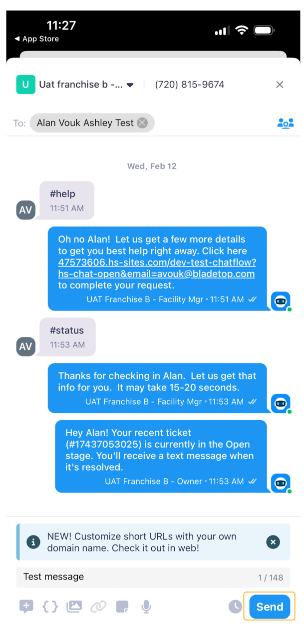
STEP 18

Click in the text box and Start typing out your message



STEP 19

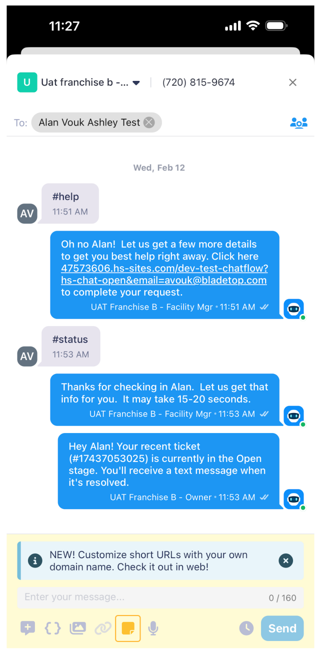
Click Send



STEP 20

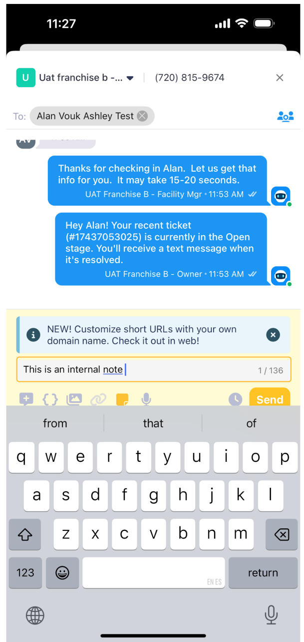
Click on the sticky icon

Note: This will cause the text box area to turn yellow signalling that you are typing and sending an internal note on the Conversation.



STEP 21

Type out your internal note

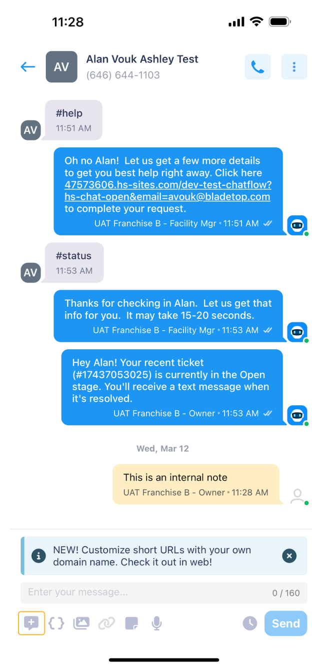


STEP 22

Click Send

STEP 23

To use or create a Saved Reply, Click on the Chat Bubble icon in the text box



STEP 24

Choose a Saved Reply or Click Create New

STEP 25

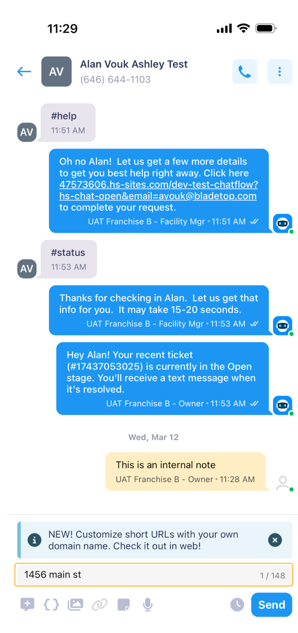
Include a Title and the Message, then Click Create

STEP 26

Select the Saved Reply

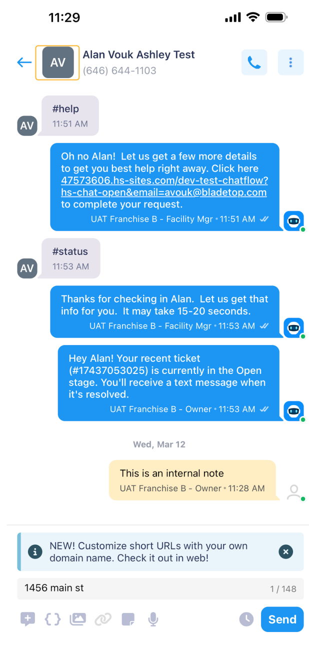
STEP 27

The reply will automatically be added to the text box in the conversation



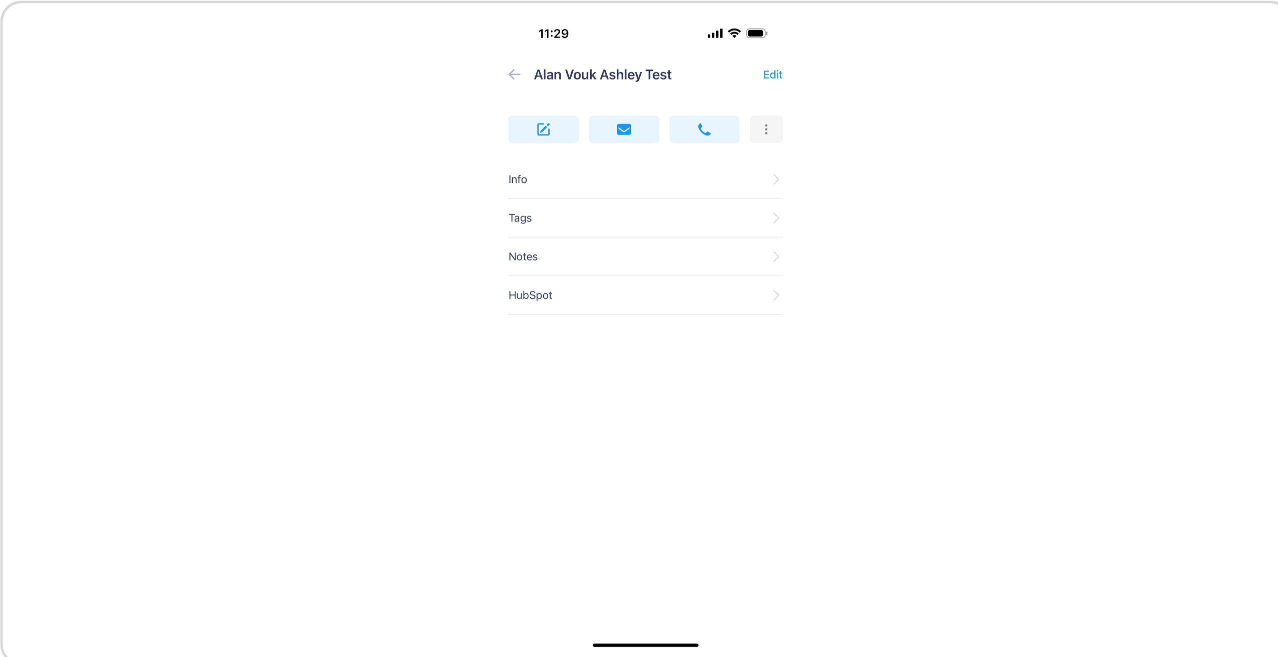
STEP 28

To view information about the contact, Click on the contact icon



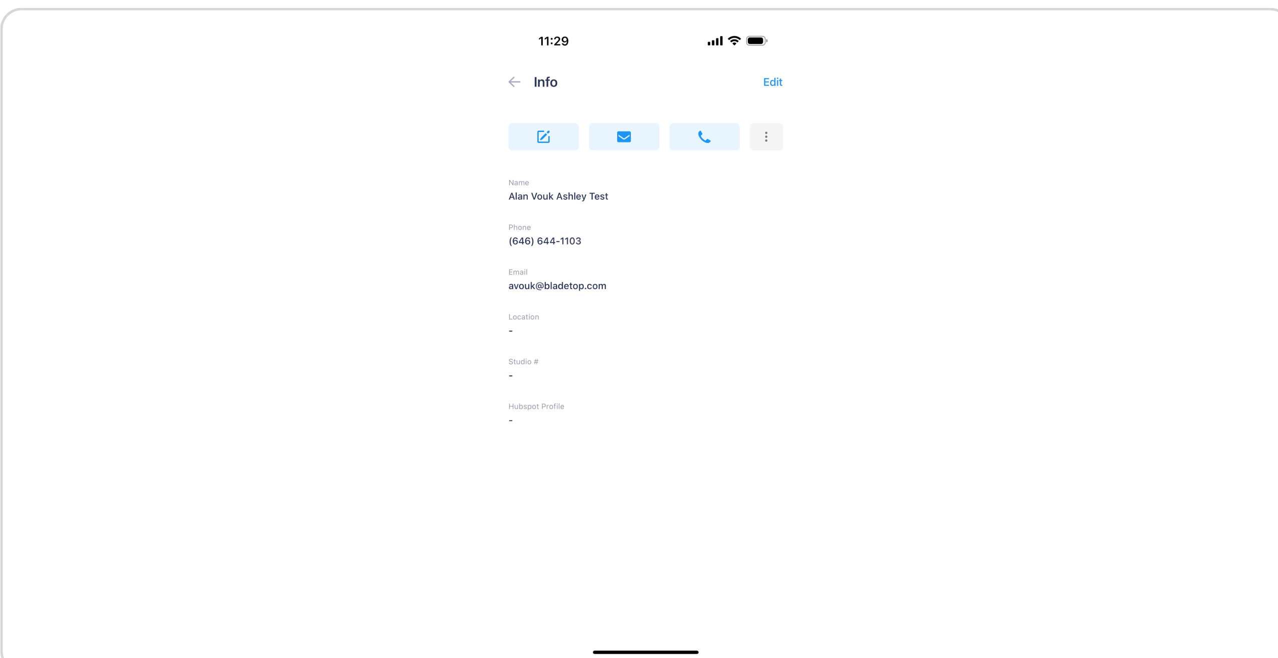
STEP 29

You can click into Info, Tags, and Notes to see those pieces of information



STEP 30

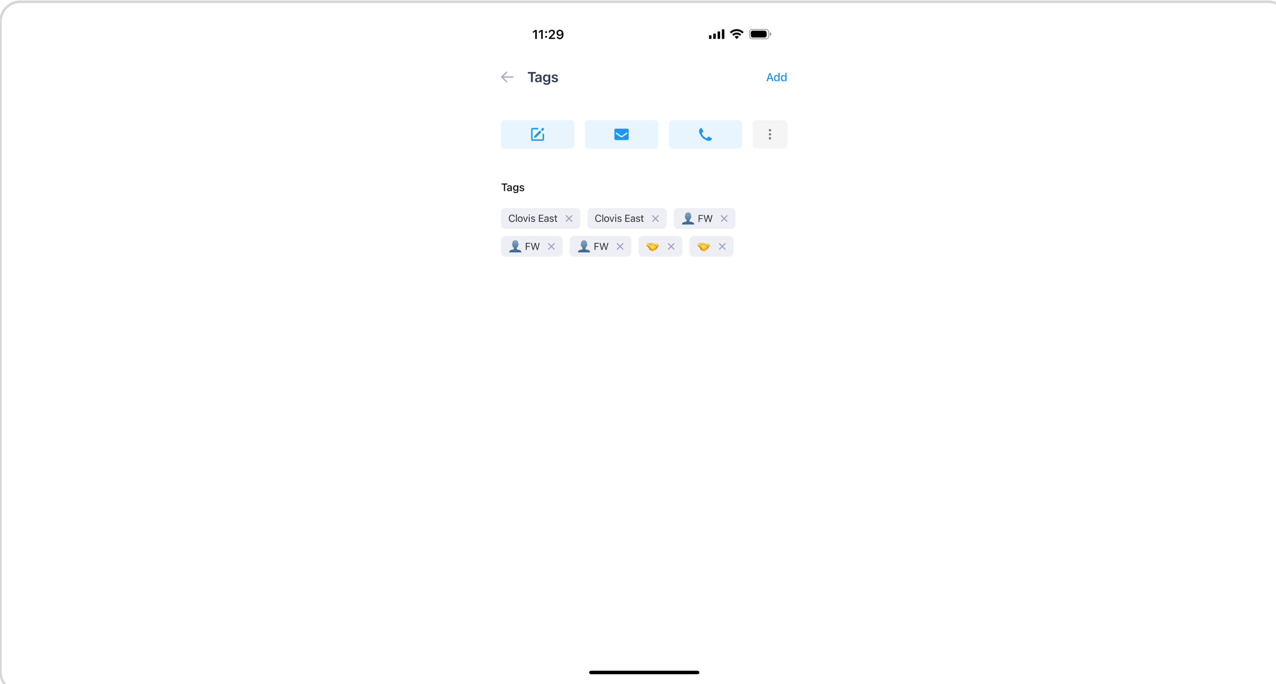
If you Click Info, you'll see the Contact info



STEP 31

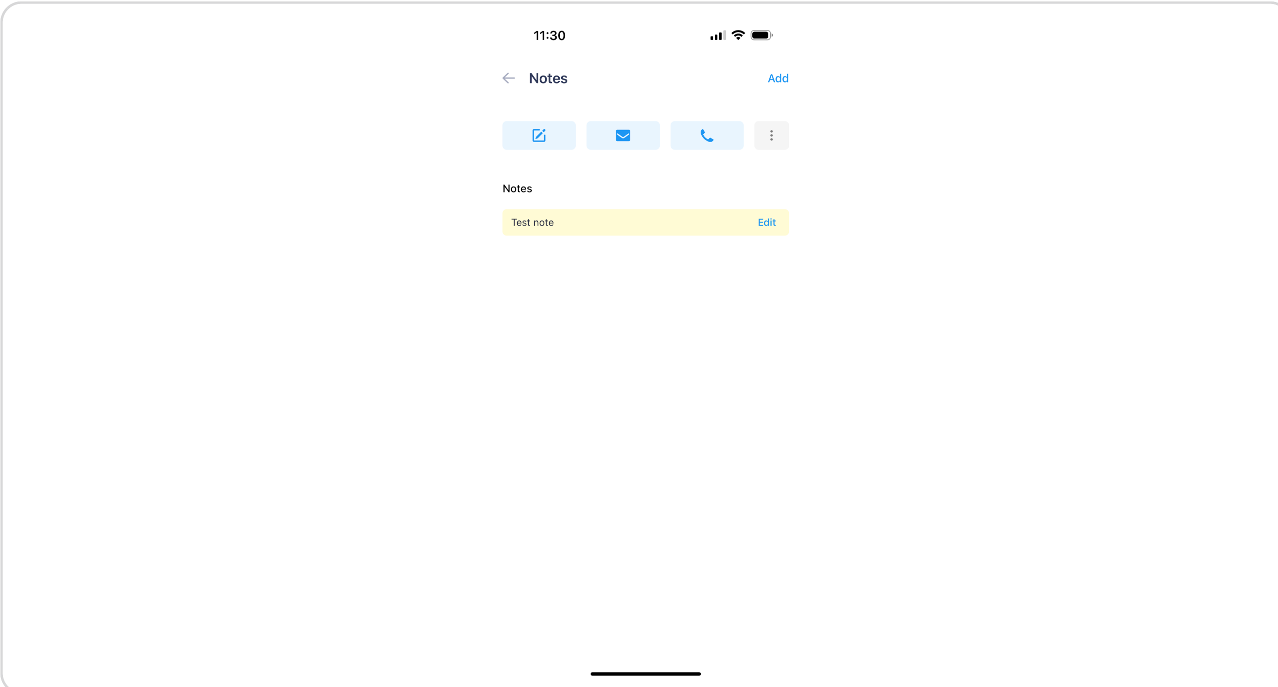
If you Click Tags, you'll see all Tags on the Contact

Tags are useful when segmenting lists.



STEP 32

If you Click Notes, you'll see all notes you've added to the Contact

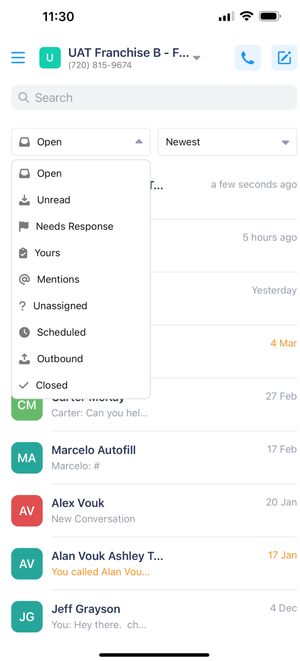


Tricks and Helpful Hints

4 Steps

STEP 33

Click on the Open dropdown. You can filter on different types of messages whether they're unread, need a response, or more



STEP 34

To mark a message as unread, hold down on the Conversation

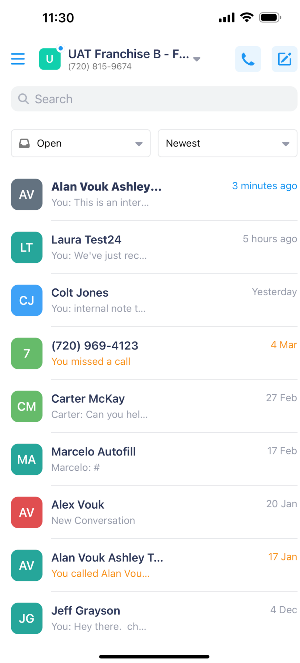
STEP 35

You'll know the Conversation is selected by the green check mark. Click the Unread button in the top right-hand corner

STEP 36

The message will be set to unread

You'll know a conversation hasn't been read if the name of the Conversation is bolded and the time is showing up in



Calls

3 Steps

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

Some handy functions include:

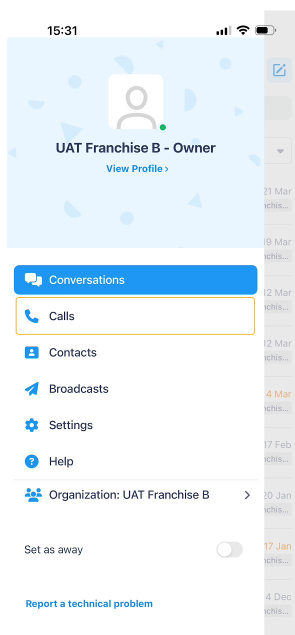
- IVR for call trees
- Voicemail
- Set up of business hours to keep your phone from ringing in the evening and weekends
- Workflows that allow auto text follow ups on missed calls

STEP 37

Navigate to Calls. Click on the hamburger menu

STEP 38

Click on Calls



STEP 39

To make a call, Click the Phone icon in the top right corner

Contacts

10 Steps

The address book or contact list is a full list of HubSpot contacts that are synced automatically into SalesMsg. This allows you the ability to quickly search and find a contact you are looking for.

Each contact has the following information coming from HubSpot automatically:

1. Full Name
2. Phone Number
3. Email
4. Location/Studio
5. HubSpot specific contact info that is customizable
6. Deep Link to the Contact in HubSpot
7. HubSpot specific Deal info that is customizable
8. Deep Link to the Deal in HubSpot
9. Notes
10. Tags

The contact list is segmented into Lists that are automatically updated based on activities in HubSpot. Each location will have a list of Contacts with open Deals. This will allow you to monitor a living list of Deals and quickly message them.

STEP 40

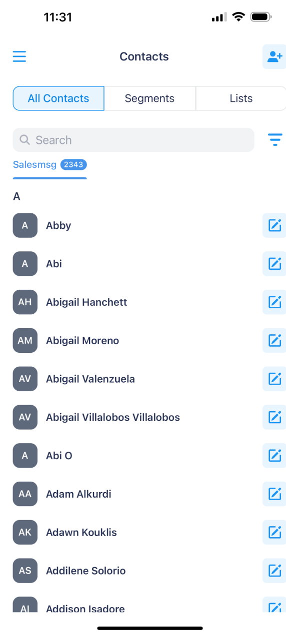
Navigate to Contacts by Clicking on the hamburger menu

STEP 41

Click Contacts

STEP 42

You'll see the full list of Contacts



STEP 43

Search will be your best friend to find the Contact you're looking for

STEP 44

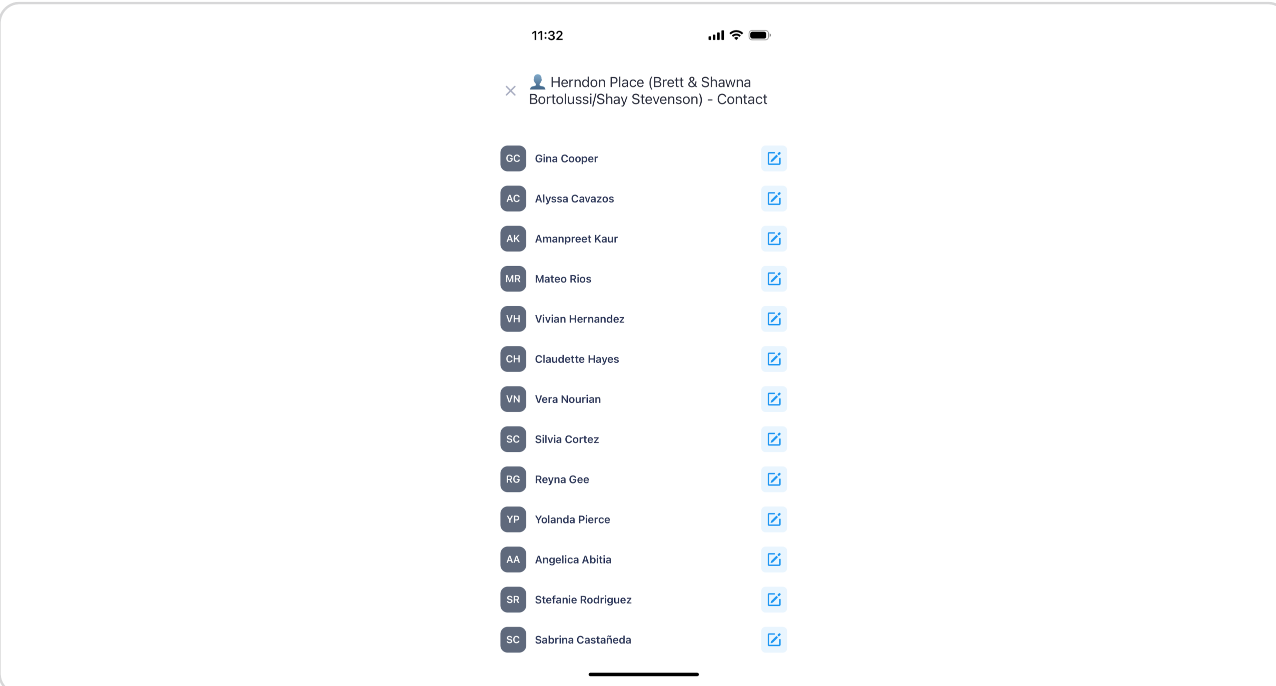
Toggle over to Lists. There are two types of Lists. The first one is indicated with a person emoji in front of it

Note: Lists will be pulled in from HubSpot.

STEP 45

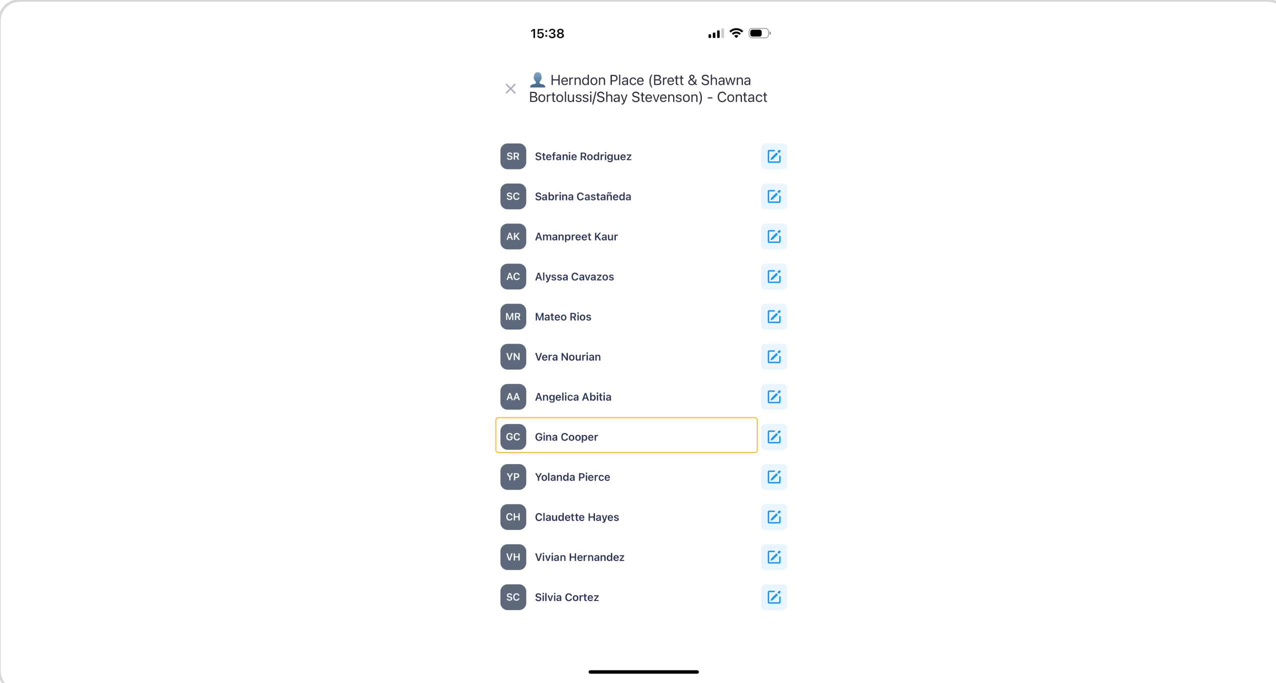
These are Lists of active Pros at the specific location

If you know what Contact you're looking for at a specific location, this is a great way to navigate there.



STEP 46

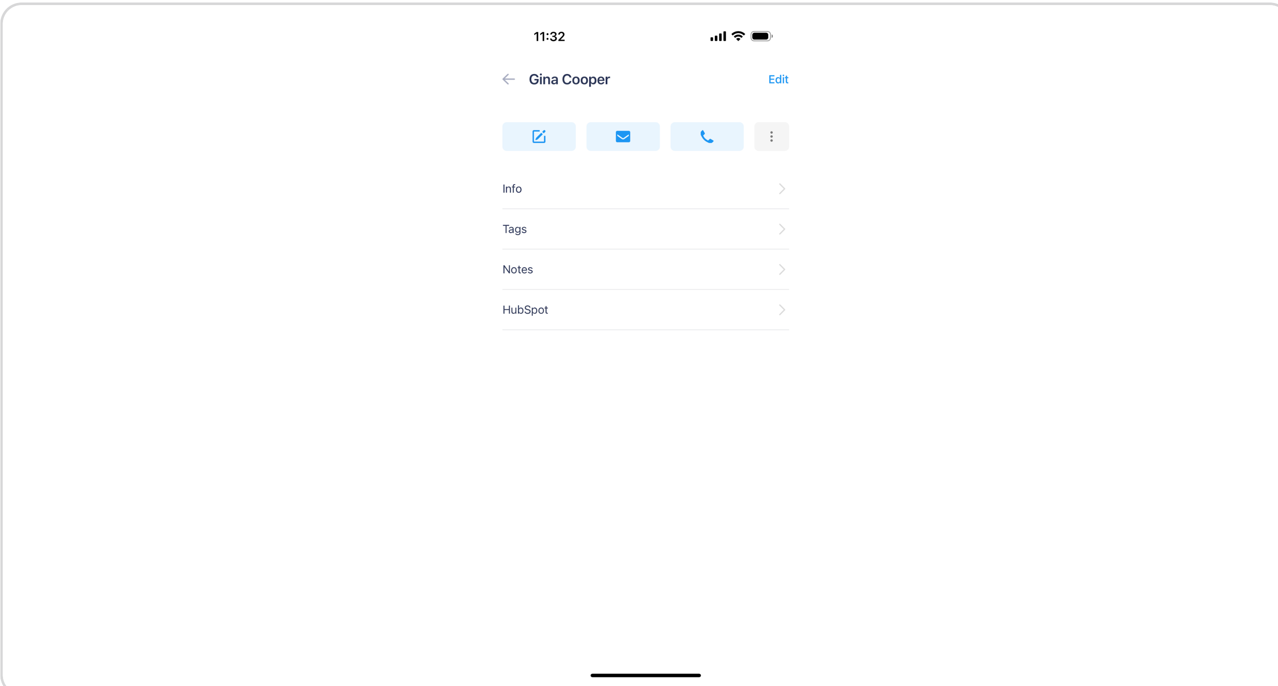
Click on the Contact to open up their info



STEP 47

From here you can compose a message or make a phone call to the Contact

Note: You can also use the HubSpot tab to view information about their Contact record or Deals they are part of within HubSpot Plus+. This section also has a link that will take you to their Contact record within the HubSpot mobile app.



STEP 48

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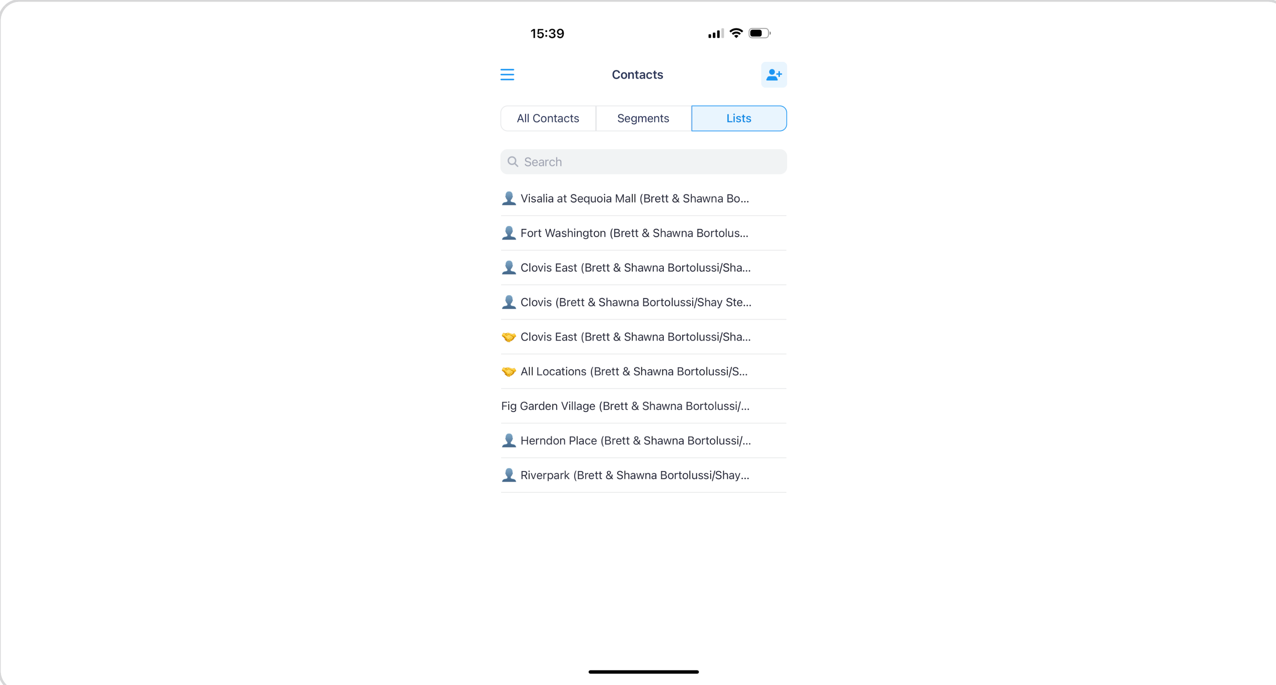
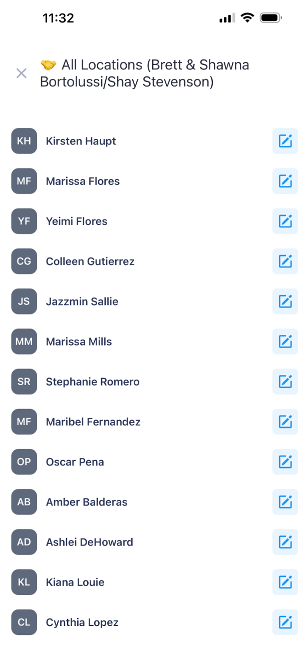


STEP 49

These are a List of active Deals in HubSpot

This is a living list, so as a Deal gets opened at a location, the Contact gets added to this list. If a Deal closes in HubSpot, the Contact will be removed from the list.



Reminder: Do NOT edit a Contact in SalesMsg. Only update the Contact information in HubSpot.

LIFT Enablement