

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

26 Steps [View most recent version](#) 

Created by

Doug Davidoff

Creation Date

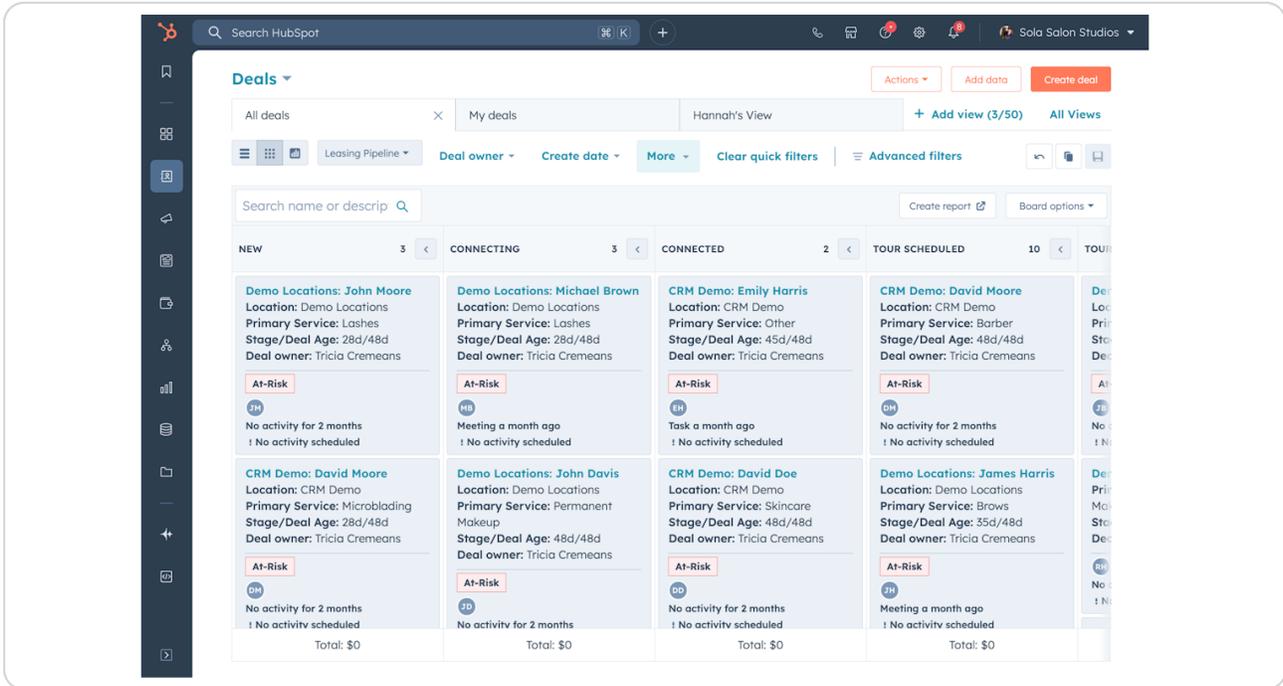
Feb 27, 2025

Last Updated

Feb 27, 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

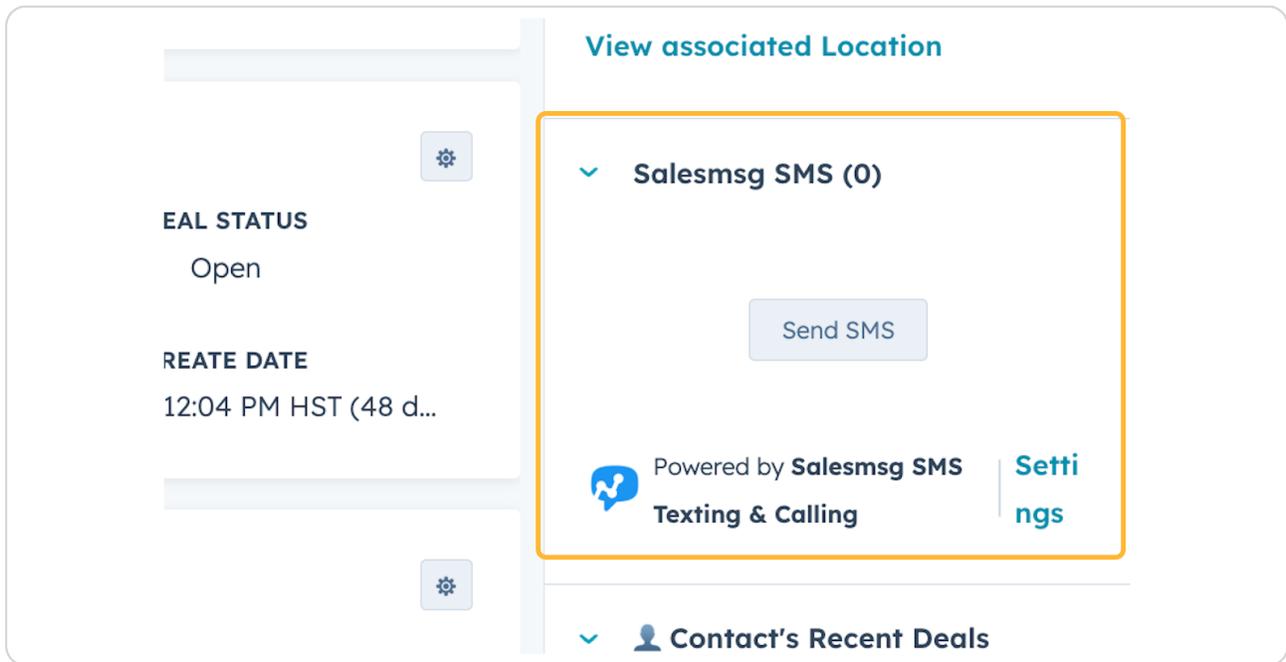
More

Schedule Now

Cancel View record

STEP 4

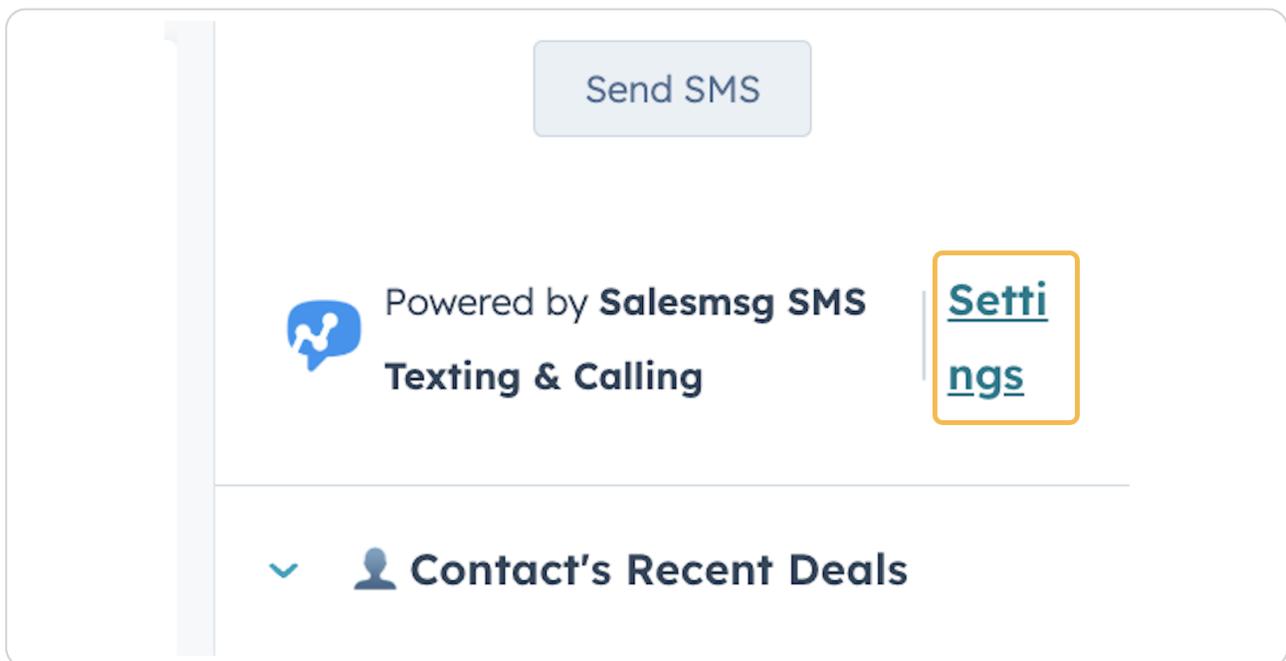
SalesMsg will appear on the right-hand side of the record



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, a panel titled 'View associated Location' contains a section for 'Salesmsg SMS (0)' which is highlighted with an orange border. This section includes a 'Send SMS' button, the text 'Powered by Salesmsg SMS Texting & Calling', and a 'Settings' link. Below this, there is a section for 'Contact's Recent Deals'.

STEP 5

Click on Settings

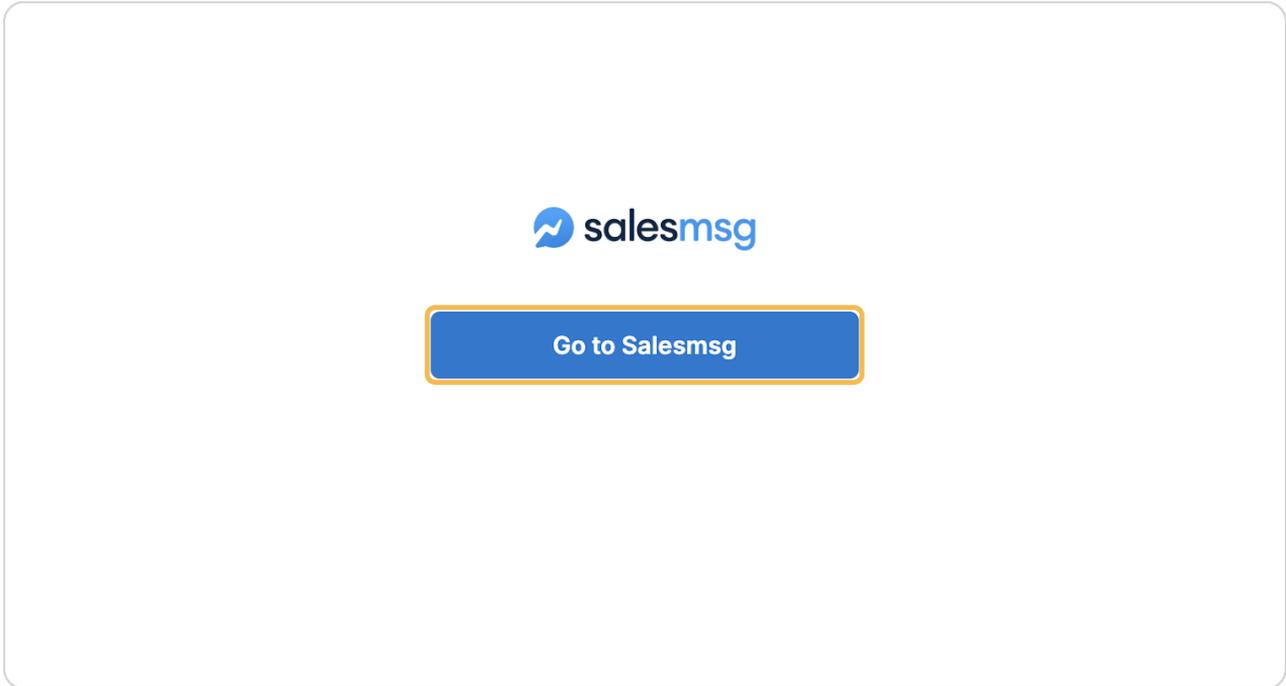


This is a close-up view of the 'Salesmsg SMS (0)' section from the previous screenshot. It shows the 'Send SMS' button at the top, followed by the Salesmsg logo, the text 'Powered by Salesmsg SMS Texting & Calling', and the 'Settings' link, which is highlighted with an orange border. Below this, the 'Contact's Recent Deals' section is partially visible.

STEP 6

Click on Go to Salesmsg

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



SalesMsg

2 Steps

A few things to note:

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

STEP 7

Ensure SMS and SalesMsg logging is enabled in HubSpot. Turn on the Send timelines in associated objects

The screenshot displays the HubSpot Settings interface for the SalesMsg integration. A blue notification banner at the top states: "Salesmsg needs your permission to [enable desktop notifications.](#)". The left sidebar shows the "Settings" menu with categories: Workspace (General, Members, Inboxes, Numbers, Teams, App Marketplace, Compliance, Plan & Billing), Product (Tags, Custom Fields, URL Shortener, Website Chat Widget, AI knowledge base (Beta), Quick links (New)), and Personal. The main content area is titled "HubSpot Settings" and includes a "Back to Integrations" link. Under "Contact Timeline Event Creation", there are four settings:

- Event Per Message:** "Every time a message is sent or received a new timeline event will be created." (On)
- Daily Conversation Recap:** "Every day at 9PM EST a bundle containing all messages will be created." (Off)
- Send timelines in associated objects:** "New timeline events will be created in associated objects." (On) - This setting is highlighted with an orange border.
- Update HubSpot Contact Owner:** "Update the contact owner in HubSpot if the contact owner is updated on Salesmsg." (Off)

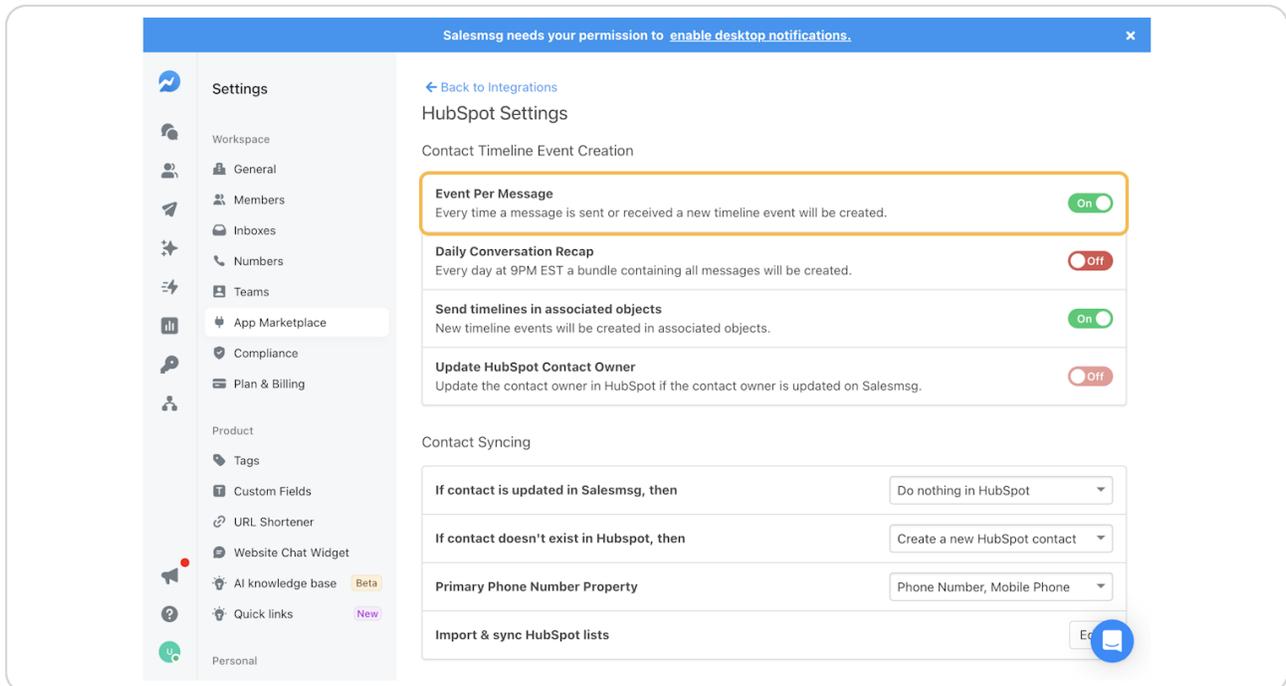
Below this is the "Contact Syncing" section with three dropdown menus:

- If contact is updated in Salesmsg, then:** Do nothing in HubSpot
- If contact doesn't exist in Hubspot, then:** Create a new HubSpot contact
- Primary Phone Number Property:** Phone Number, Mobile Phone

At the bottom of the settings area is an "Import & sync HubSpot lists" button with an "Ed" icon.

STEP 8

Click On for Event Per Message



The screenshot displays the HubSpot Settings page for Salesmsg. A blue notification banner at the top states: "Salesmsg needs your permission to [enable desktop notifications.](#)". The left sidebar contains a navigation menu with categories: Settings, Workspace, Product, and Personal. The main content area is titled "HubSpot Settings" and includes a "Back to Integrations" link. Under the "Contact Timeline Event Creation" section, the "Event Per Message" toggle is highlighted with a yellow border and is currently turned "On". Below it, the "Daily Conversation Recap" toggle is "Off", "Send timelines in associated objects" is "On", and "Update HubSpot Contact Owner" is "Off". The "Contact Syncing" section contains three dropdown menus: "If contact is updated in Salesmsg, then" (set to "Do nothing in HubSpot"), "If contact doesn't exist in Hubspot, then" (set to "Create a new HubSpot contact"), and "Primary Phone Number Property" (set to "Phone Number, Mobile Phone"). An "Import & sync HubSpot lists" button is visible at the bottom right of this section.

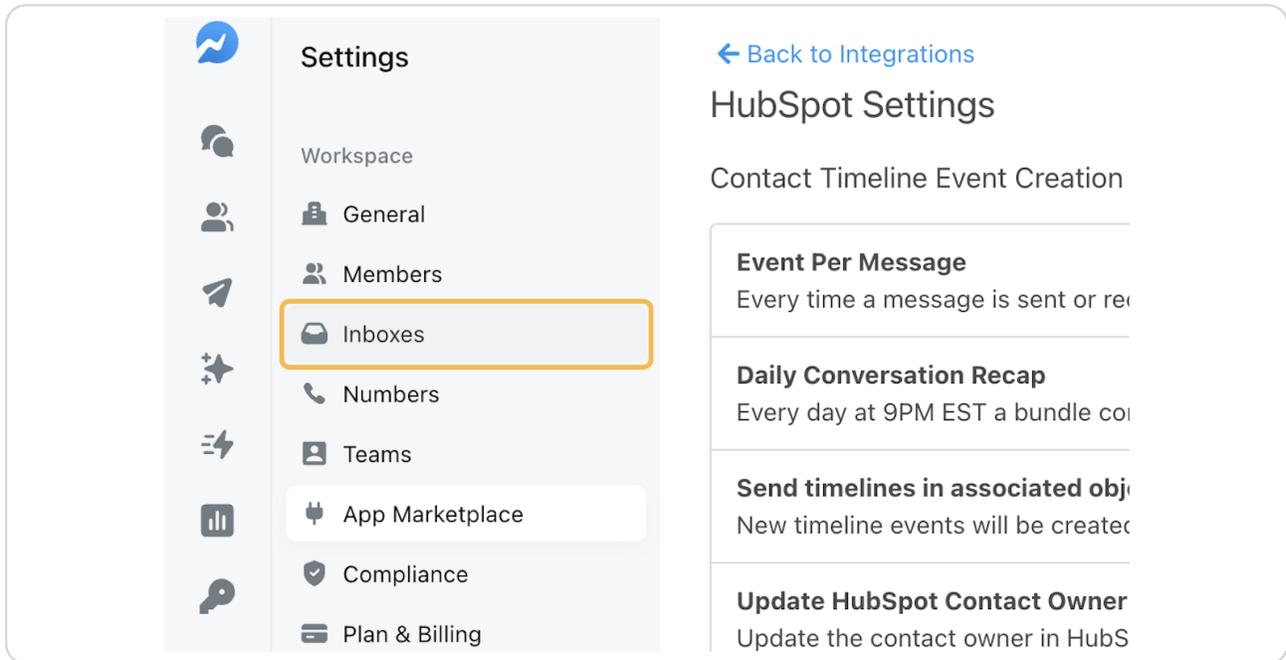
Inboxes

4 Steps

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

STEP 9

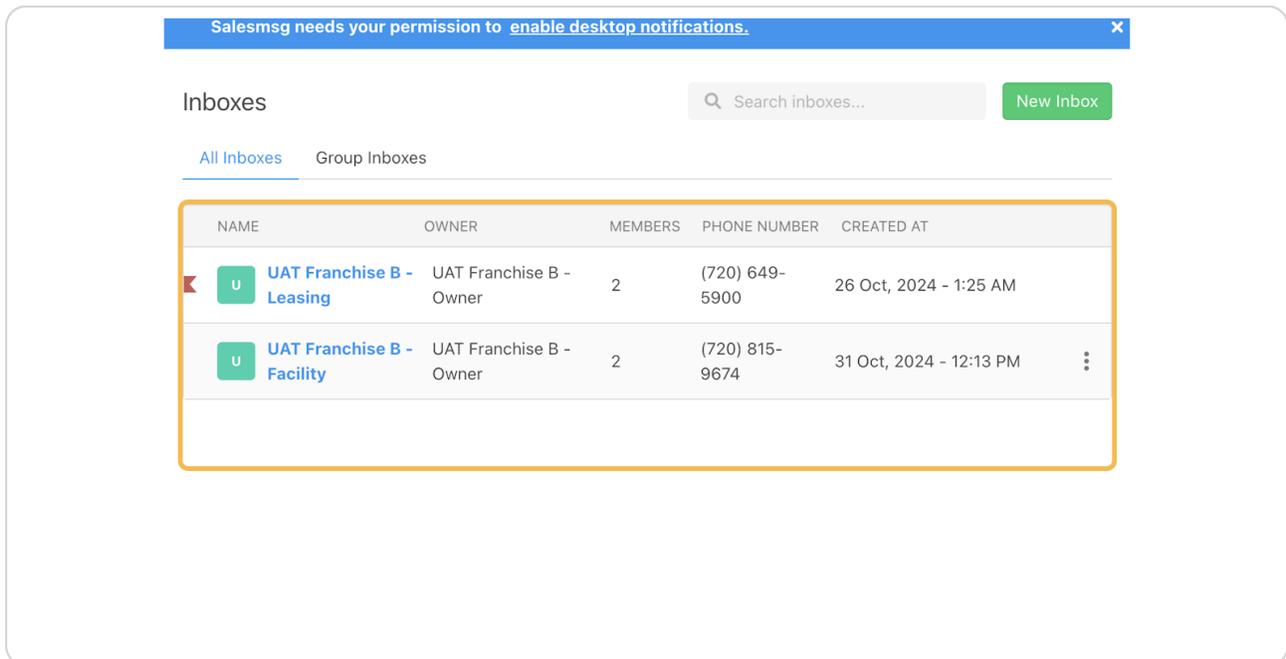
Click on Inboxes



The screenshot shows the HubSpot Settings interface. On the left is a navigation sidebar with icons for various settings categories. The 'Inboxes' option, represented by a mailbox icon, is highlighted with a yellow rectangular box. The main content area on the right is titled 'HubSpot Settings' and includes a 'Back to Integrations' link. Below this, there are sections for 'Contact Timeline Event Creation', 'Event Per Message', 'Daily Conversation Recap', 'Send timelines in associated obj', and 'Update HubSpot Contact Owner'.

STEP 10

Here you will see your Inboxes



The screenshot displays the 'Inboxes' page in HubSpot. At the top, there is a notification banner: 'Salesmsg needs your permission to enable desktop notifications.' Below this, the page title 'Inboxes' is followed by a search bar and a 'New Inbox' button. There are two tabs: 'All Inboxes' (selected) and 'Group Inboxes'. A table lists the inboxes, with the first two rows highlighted by a yellow box.

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 11

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 12

Click Make Default

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



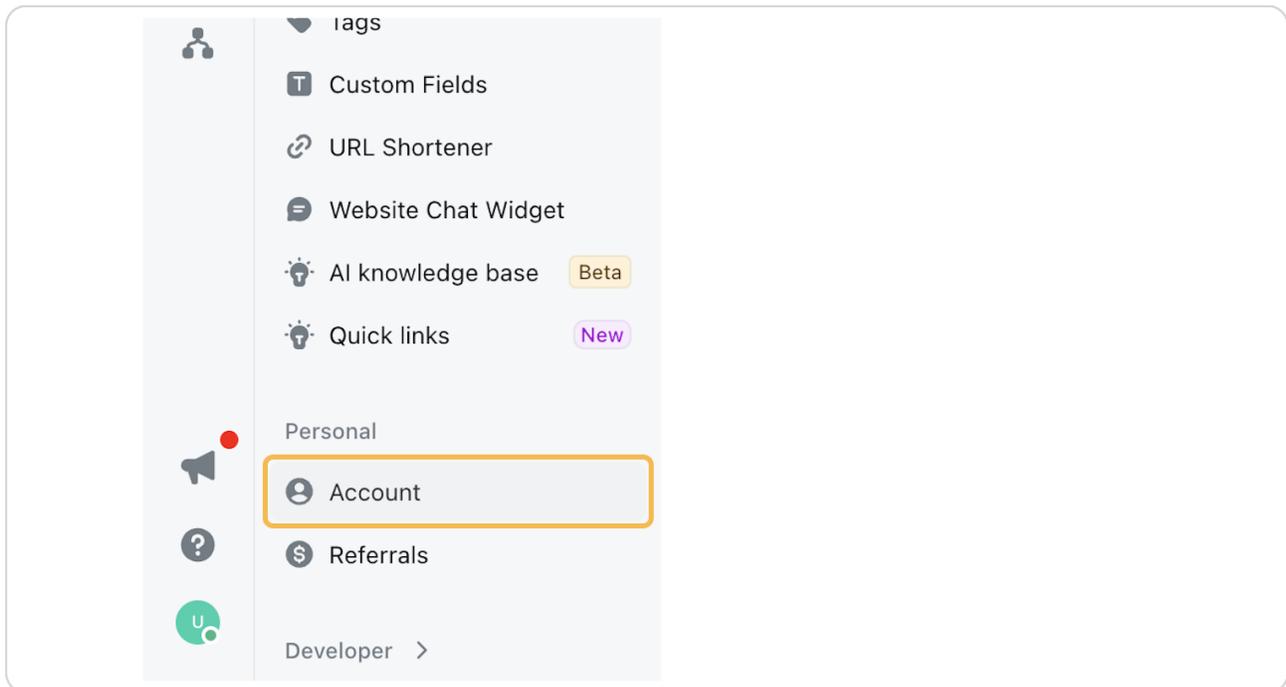
Update Notifications

3 Steps

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

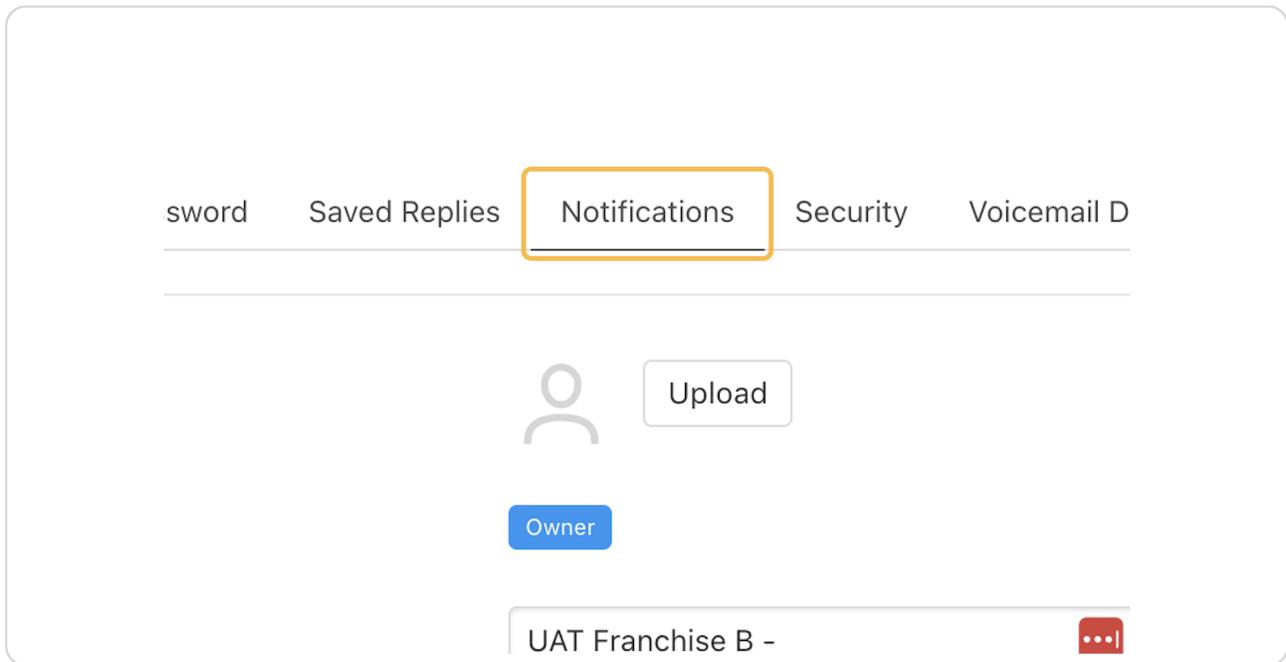
STEP 13

Click on Account within Settings



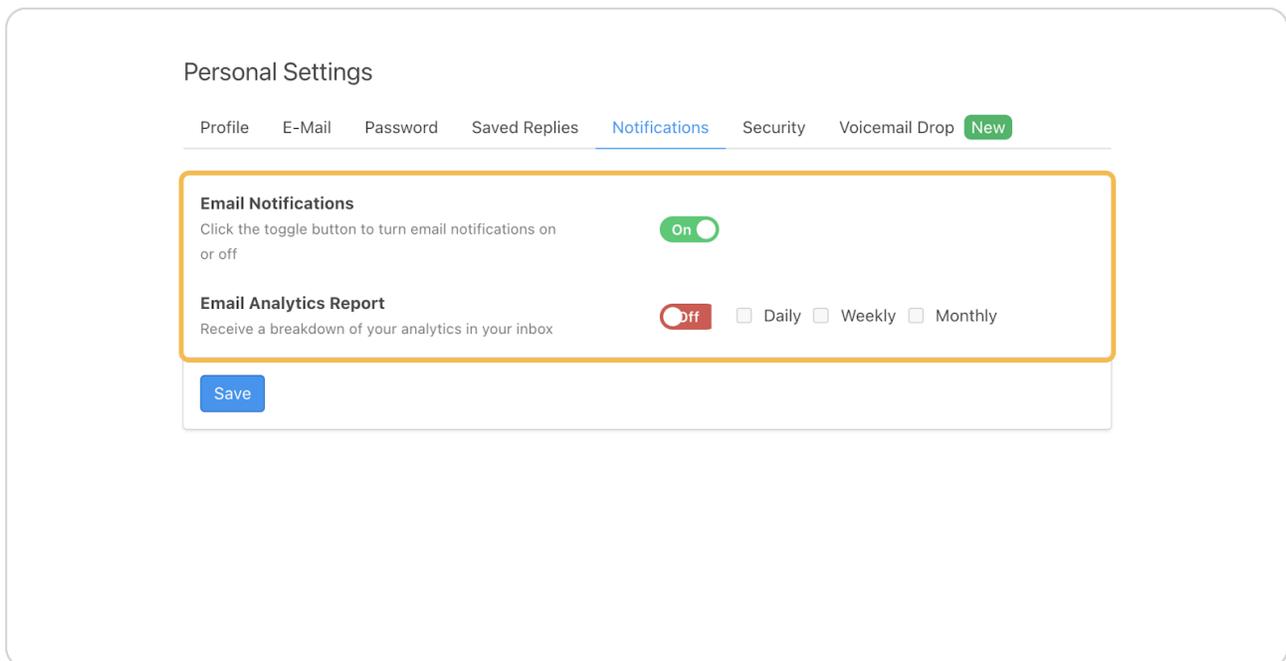
STEP 14

Click on Notifications



STEP 15

Here you can update your notifications for Email and Analytics Reports

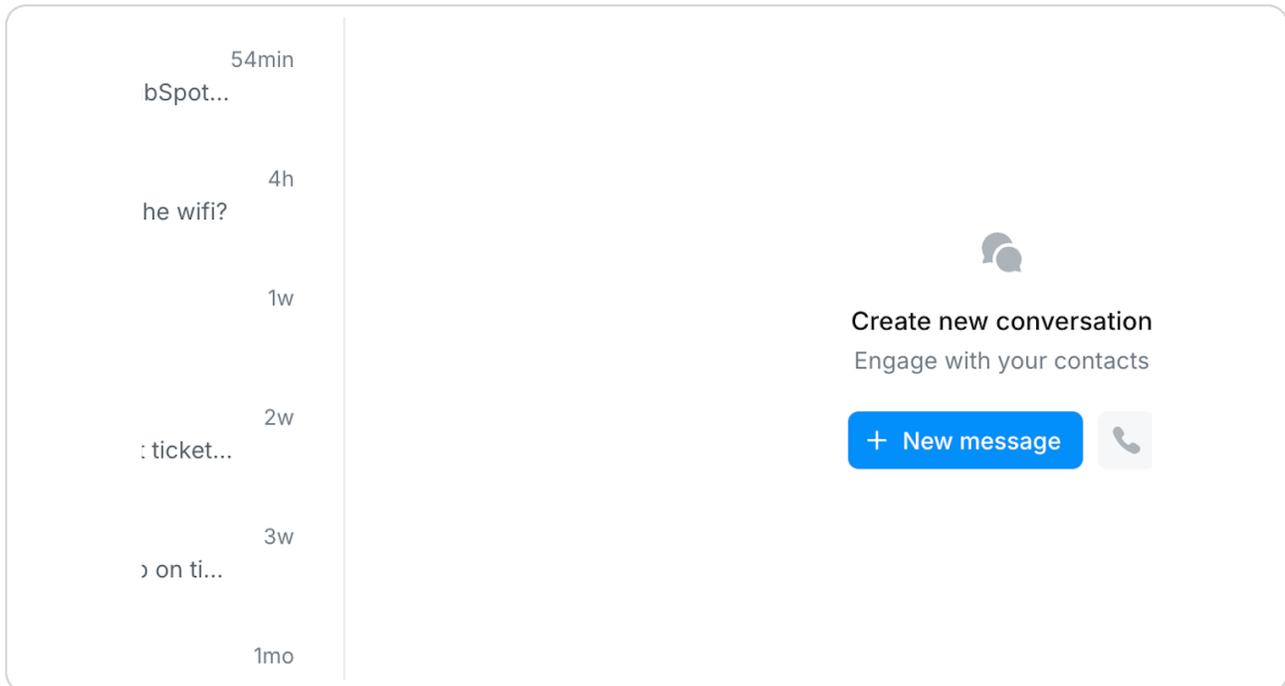


Favoriting Key Locations

4 Steps

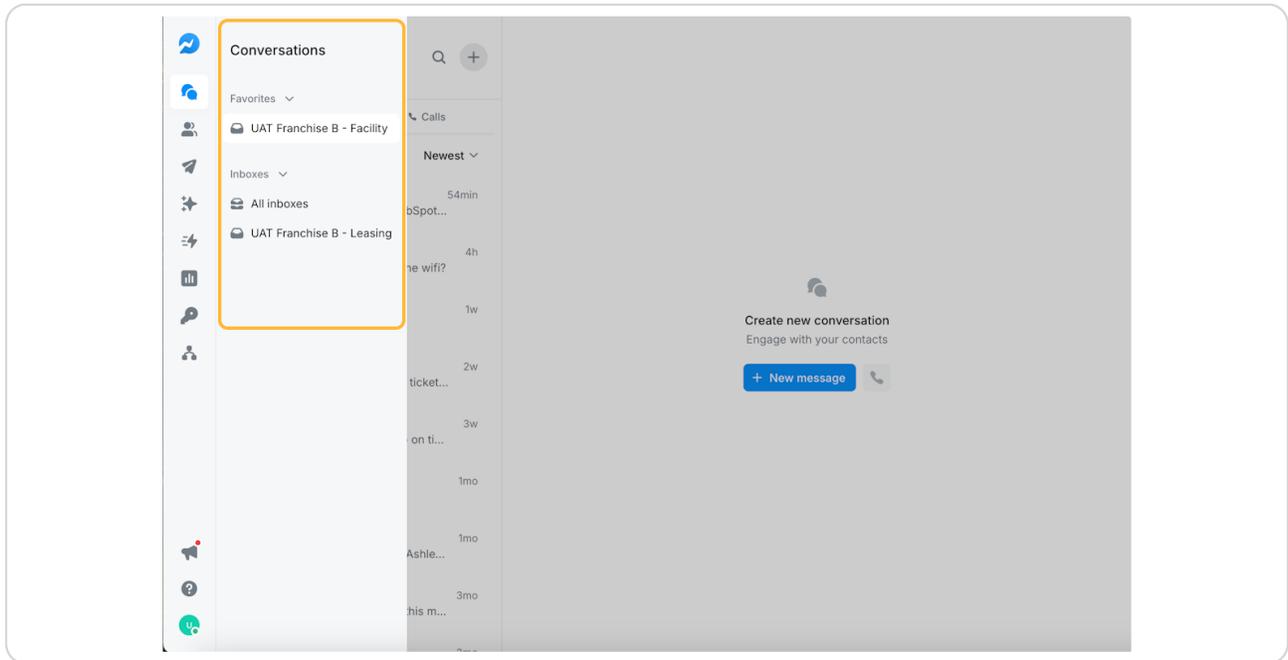
STEP 16

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



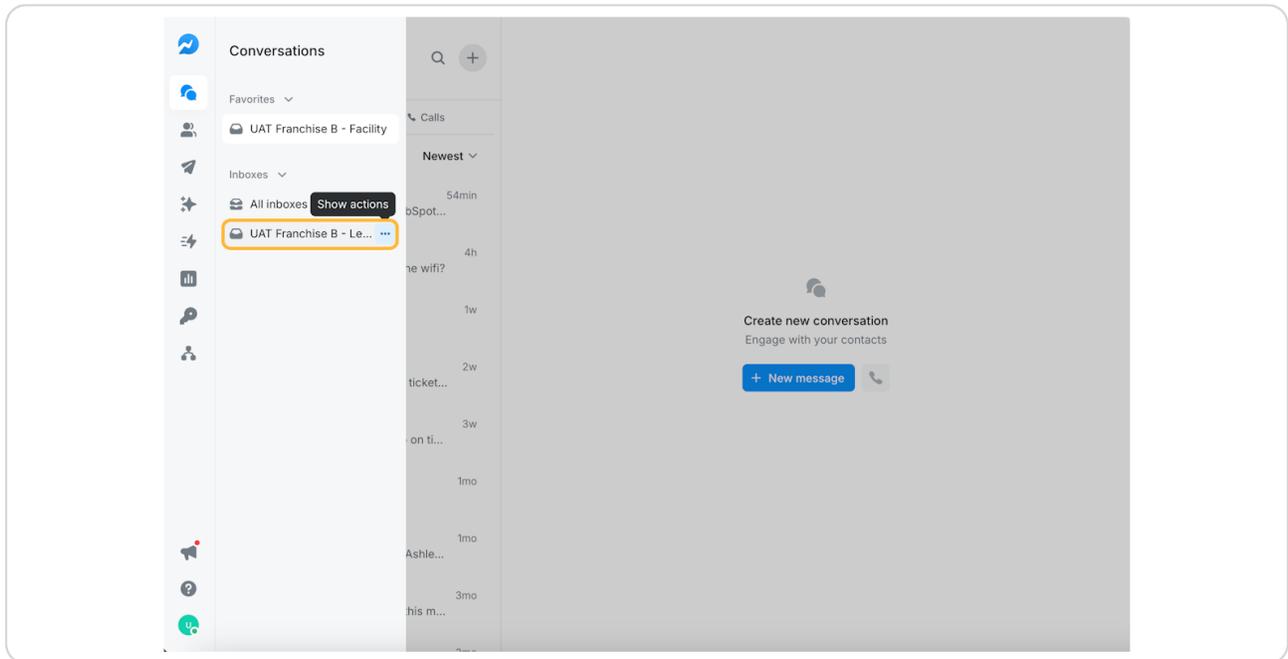
STEP 17

The Menu will Open



STEP 18

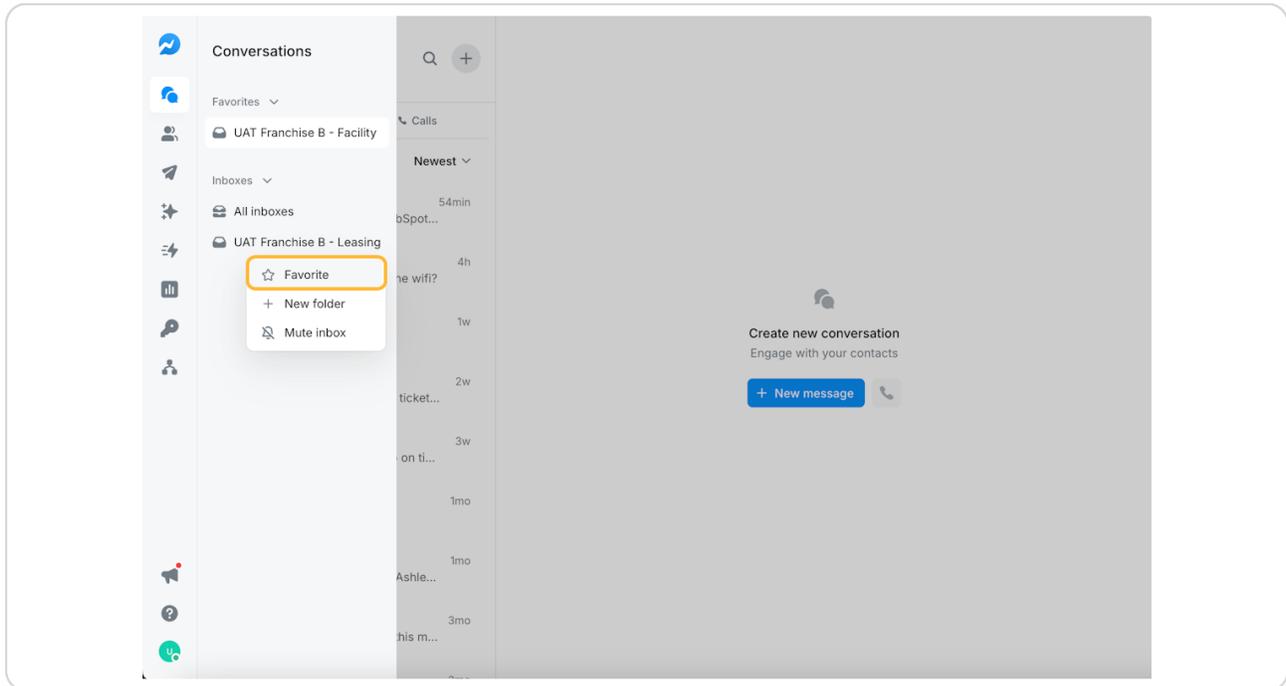
Hover over the location you want to favorite and Click on the 3 dots



STEP 19

Click Favorite

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

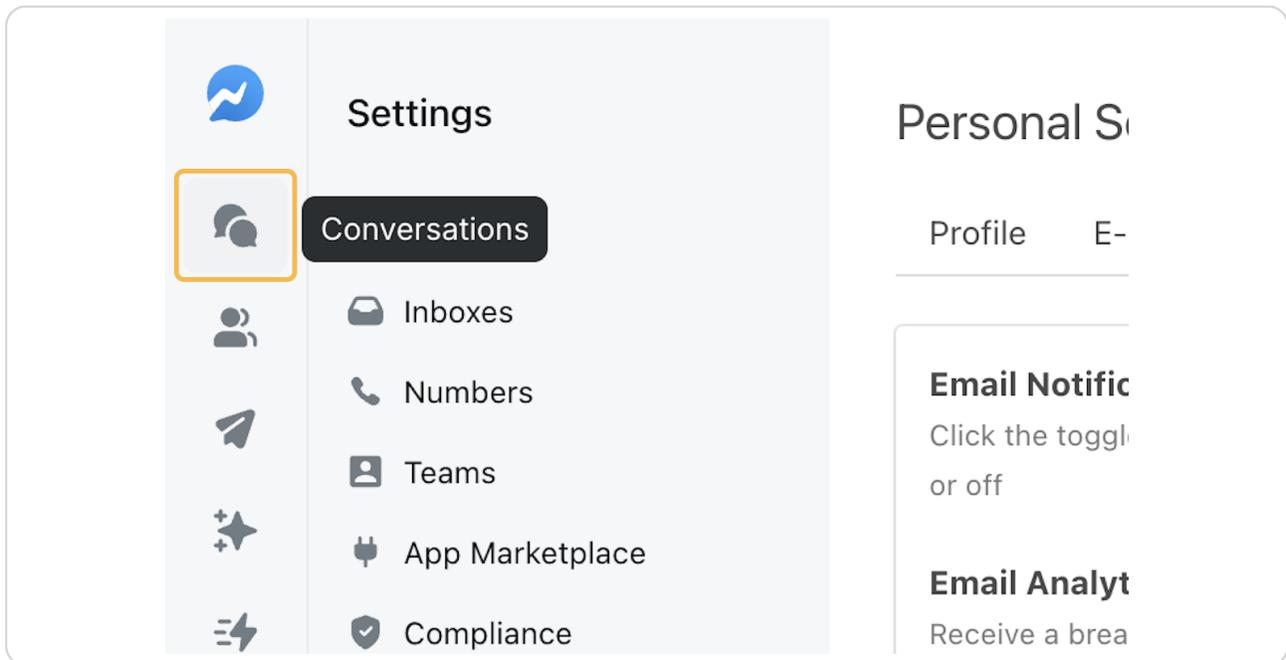


Viewing Message History

3 Steps

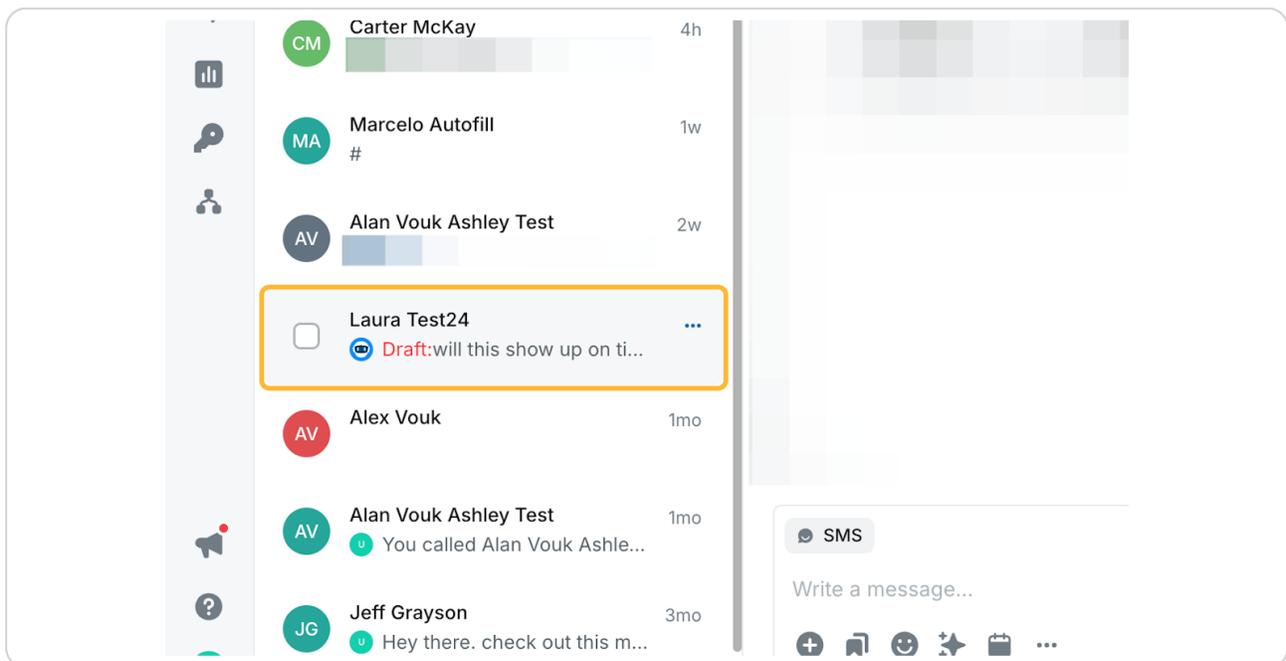
STEP 20

Click on Conversations



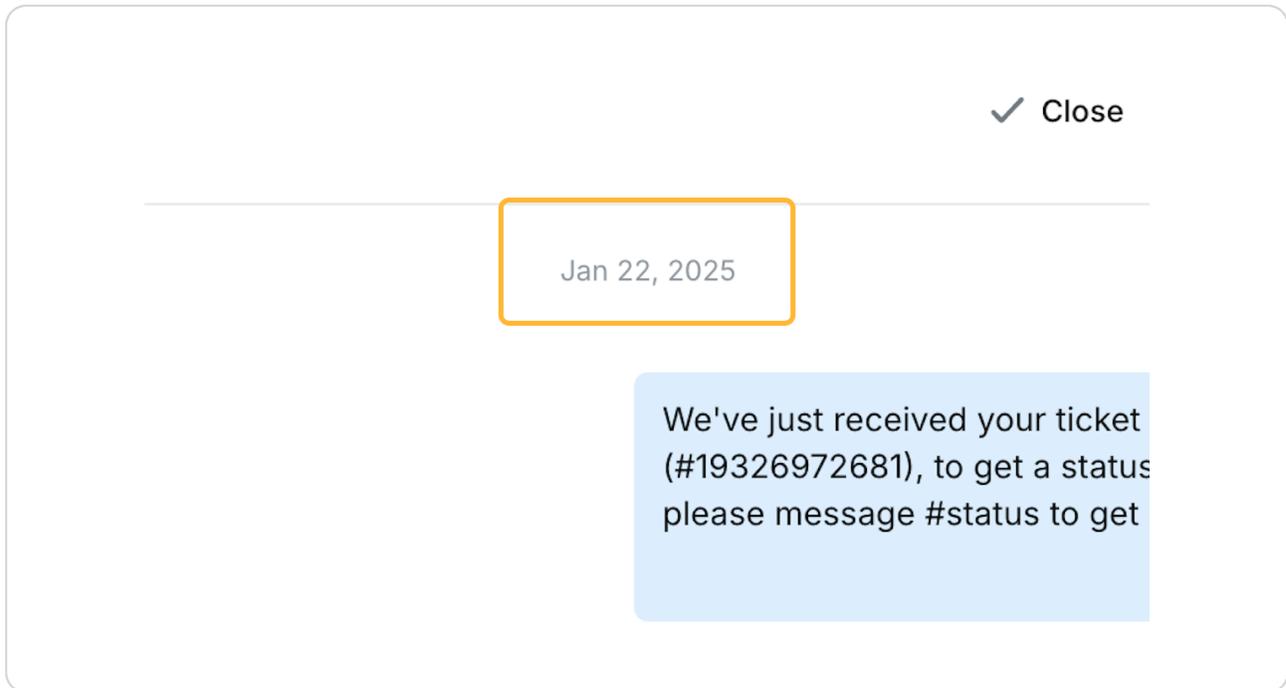
STEP 21

Click on a Conversation



STEP 22

You'll be able to scroll and see message history

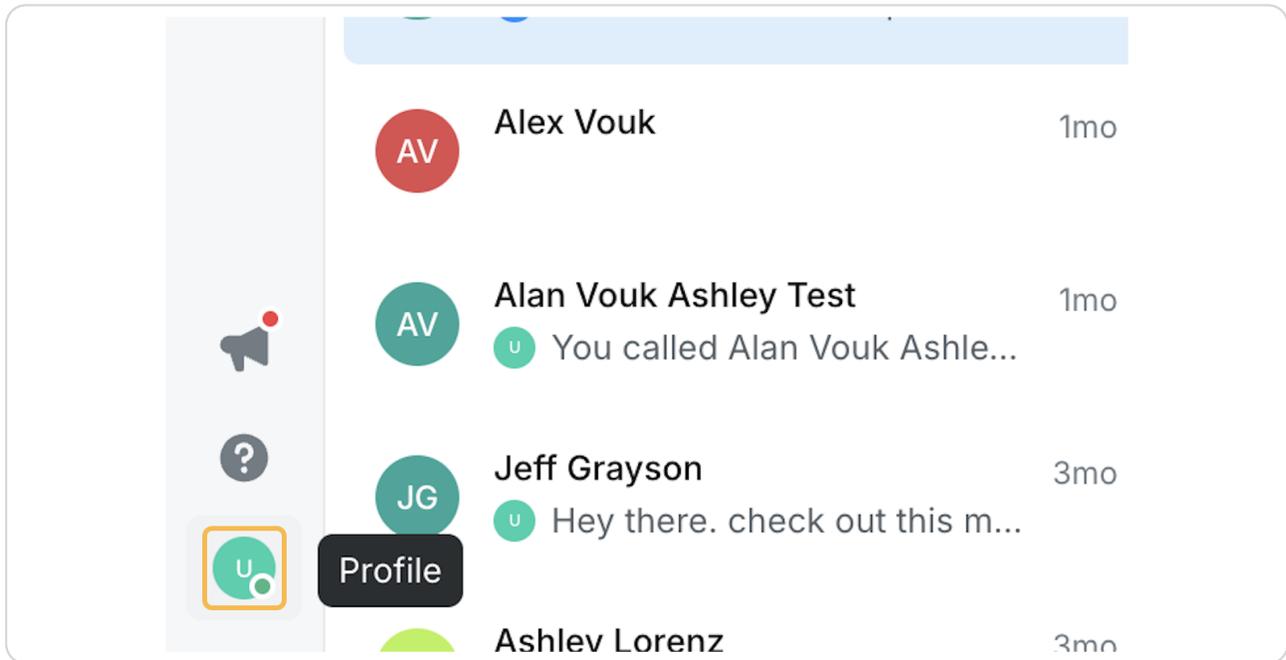


Saved Replies Setup

4 Steps

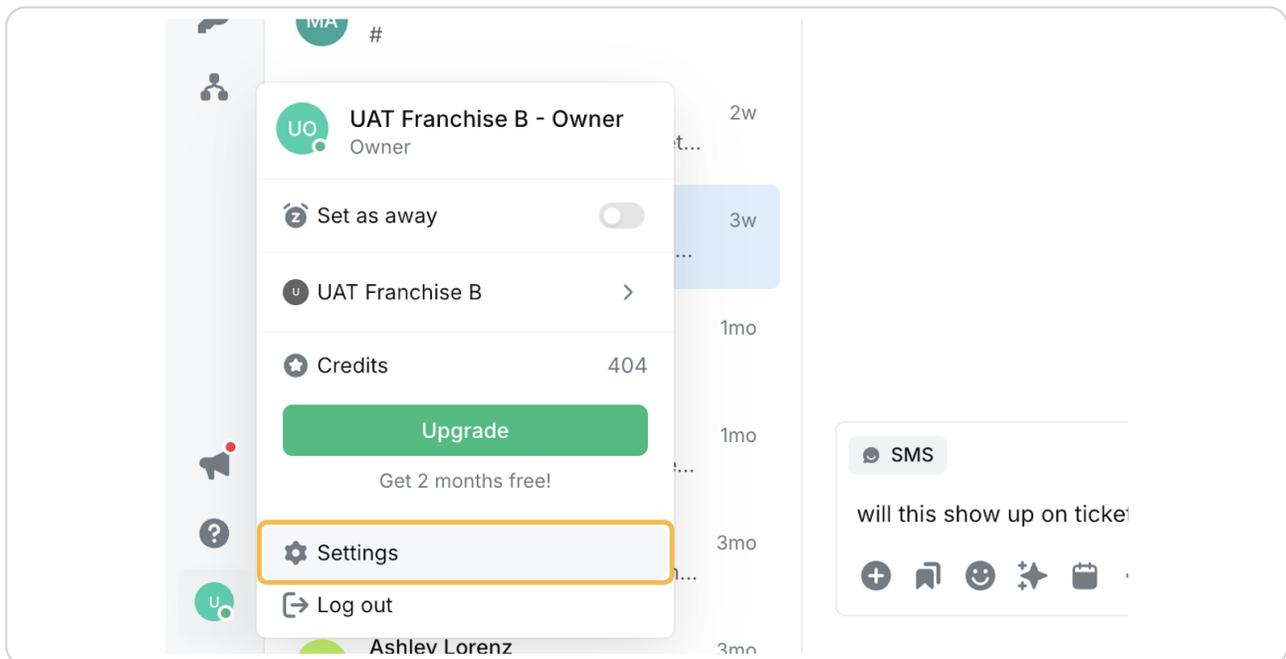
STEP 23

Click on Your Profile



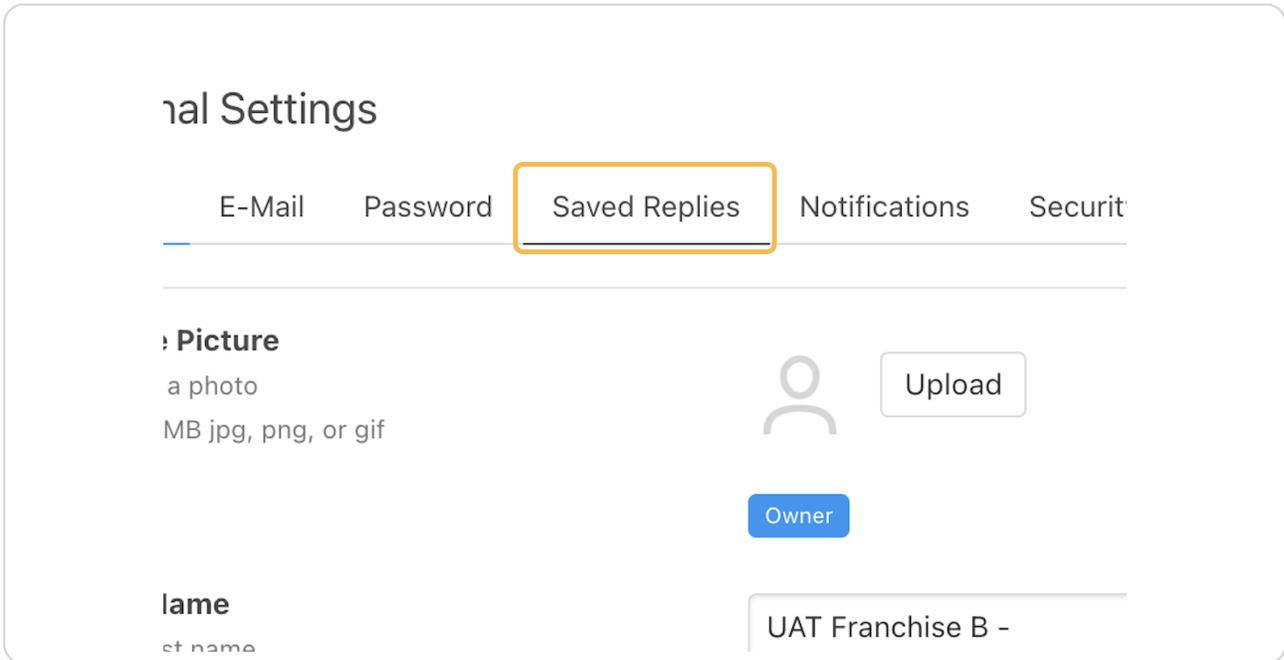
STEP 24

Click on Settings



STEP 25

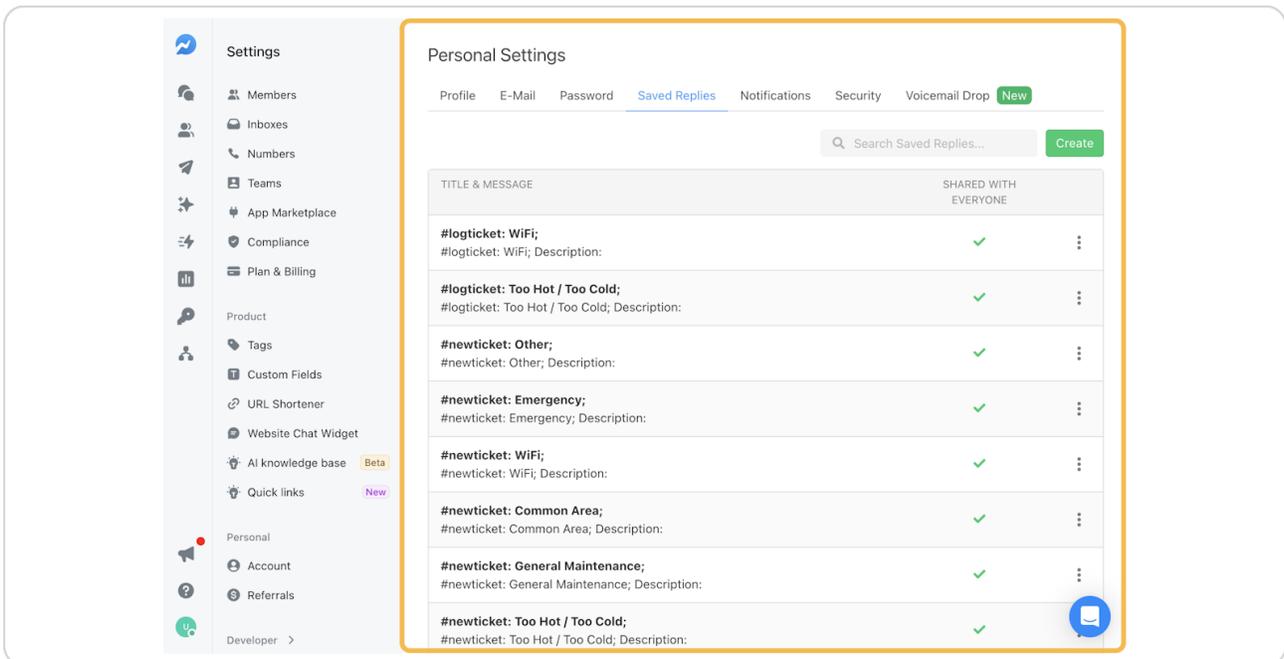
Click on Saved Replies



The screenshot shows the 'Personal Settings' page. At the top, there are tabs for 'E-Mail', 'Password', 'Saved Replies', 'Notifications', and 'Security'. The 'Saved Replies' tab is highlighted with an orange box. Below the tabs, there is a section for 'Profile Picture' with a placeholder icon and an 'Upload' button. Below that is a blue 'Owner' button. At the bottom, there is a text input field containing 'UAT Franchise B -'.

STEP 26

Here you can manage your Saved Replies



The screenshot shows the 'Saved Replies' management interface. On the left is a sidebar with various settings categories. The main content area is titled 'Personal Settings' and has a 'Saved Replies' tab selected. Below the tabs is a search bar and a 'Create' button. The main area contains a table of saved replies.

TITLE & MESSAGE	SHARED WITH EVERYONE
#logticket: WiFi; #logticket: WiFi; Description:	✓
#logticket: Too Hot / Too Cold; #logticket: Too Hot / Too Cold; Description:	✓
#newticket: Other; #newticket: Other; Description:	✓
#newticket: Emergency; #newticket: Emergency; Description:	✓
#newticket: WiFi; #newticket: WiFi; Description:	✓
#newticket: Common Area; #newticket: Common Area; Description:	✓
#newticket: General Maintenance; #newticket: General Maintenance; Description:	✓
#newticket: Too Hot / Too Cold; #newticket: Too Hot / Too Cold; Description:	✓

