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]

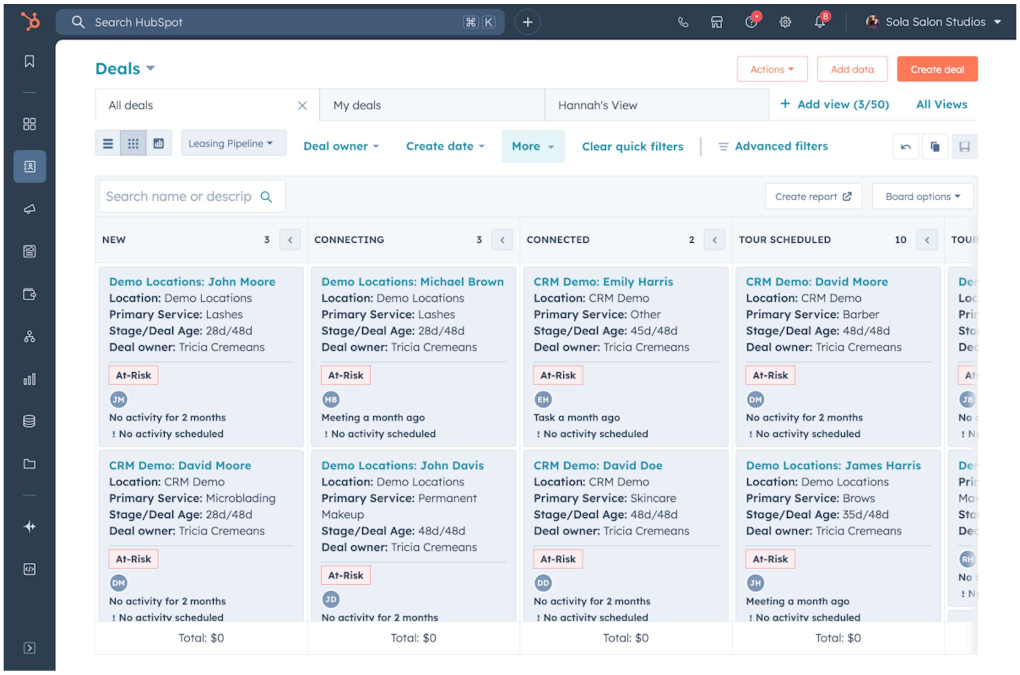
Created by	Creation Date	Last Updated
Doug Davidoff	Feb 27, 2025	Feb 27, 2025

Jump into HubSpot

6 Steps

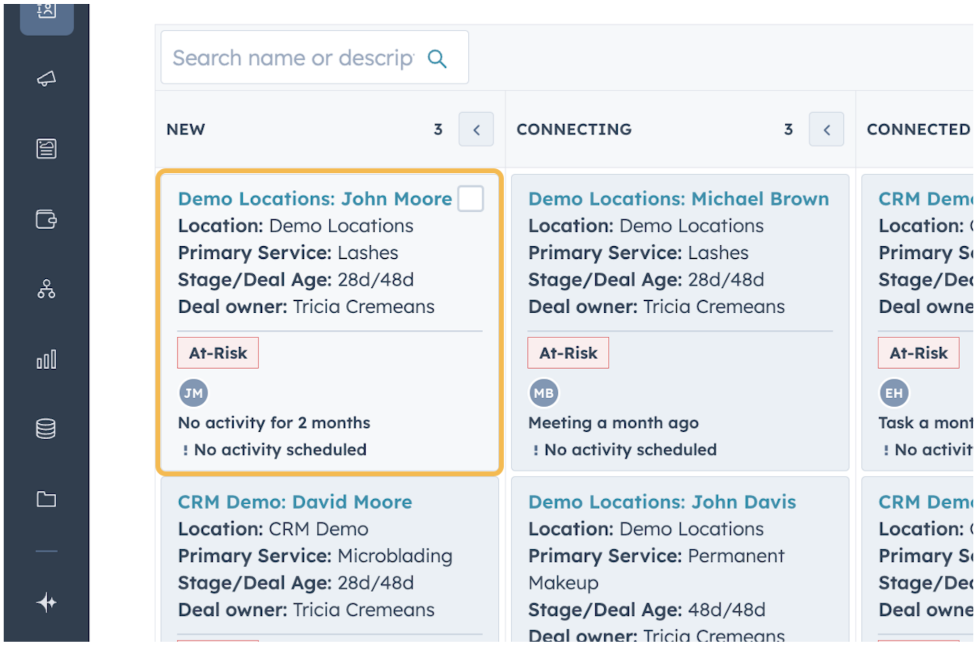
STEP 1

Navigate to Deals



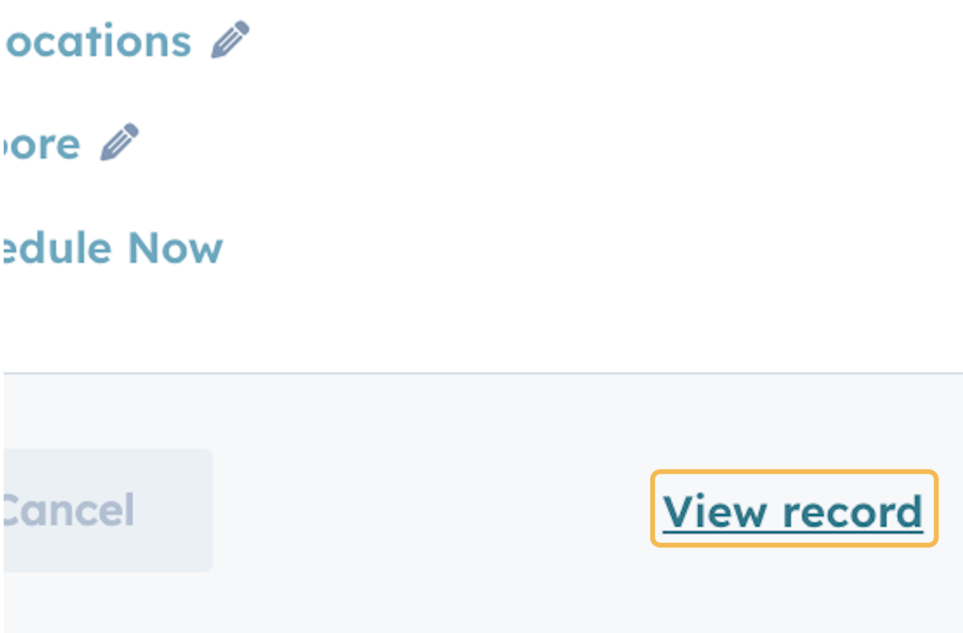
STEP 2

Click on a Deal



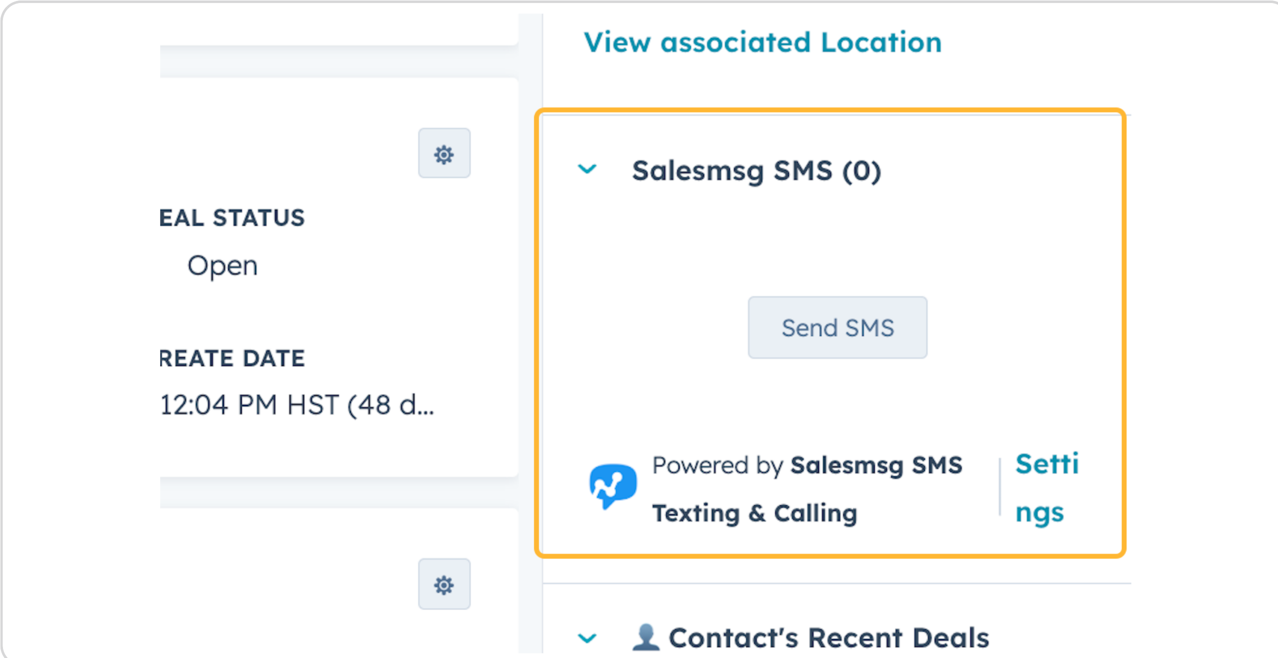
STEP 3

Click on View record



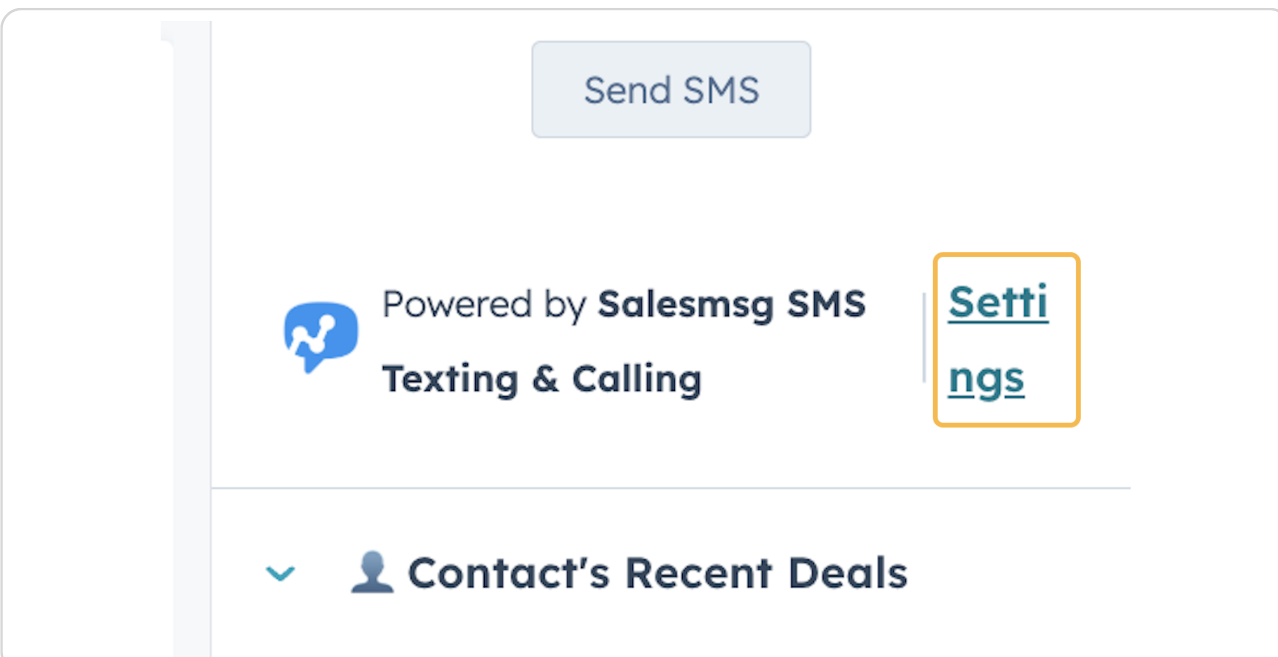
STEP 4

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



STEP 5

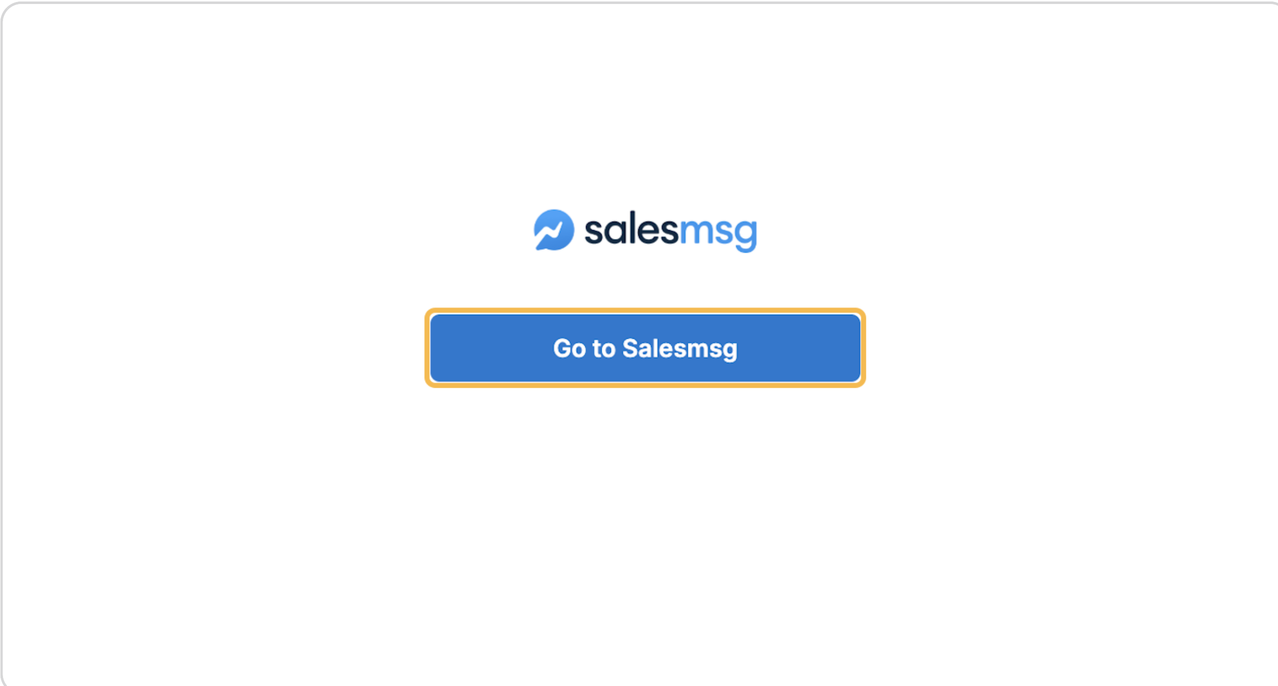
Click on Settings



STEP 6

Click on Go to Salesmsg

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



SalesMsg

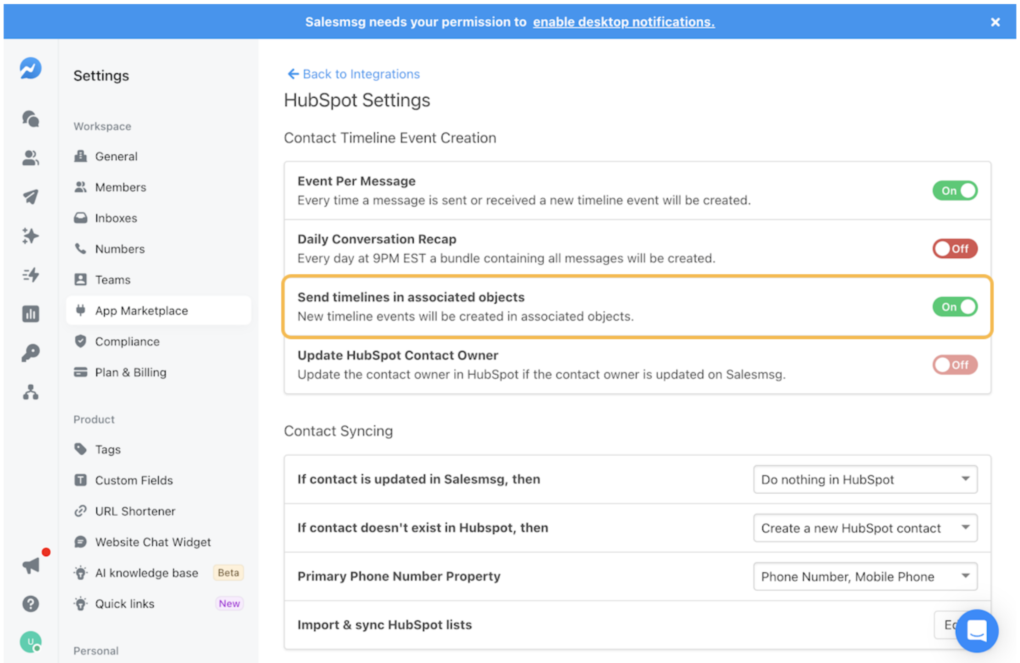
2 Steps

A few things to note:

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

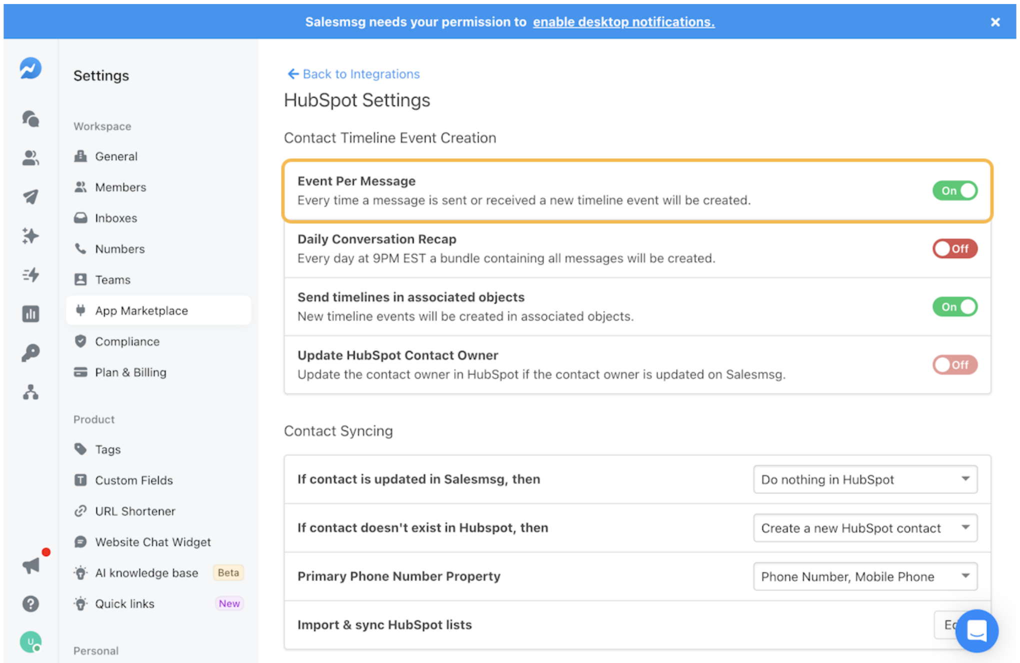
STEP 7

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



STEP 8

Click On for Event Per Message



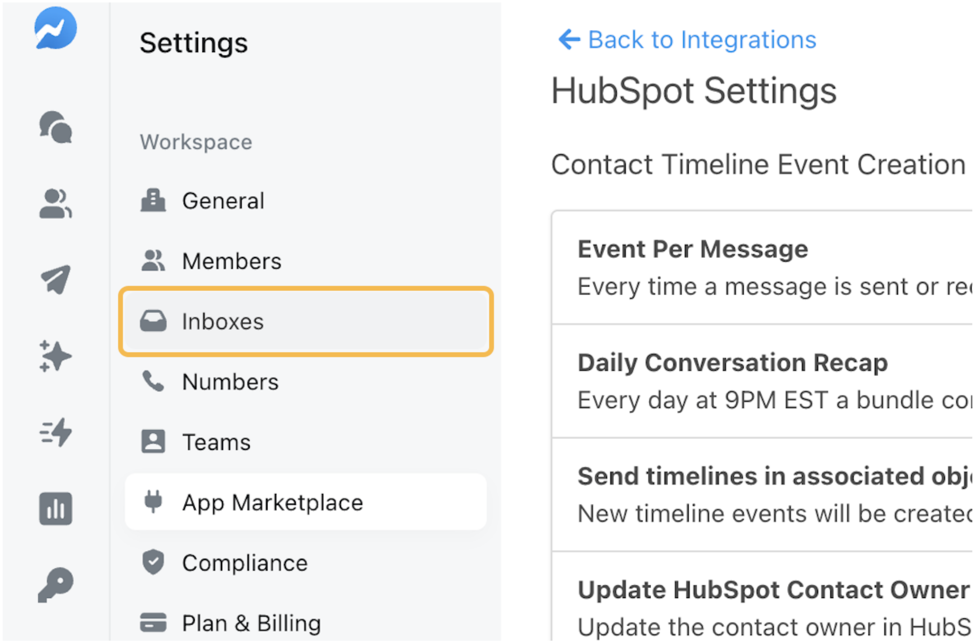
Inboxes

4 Steps

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

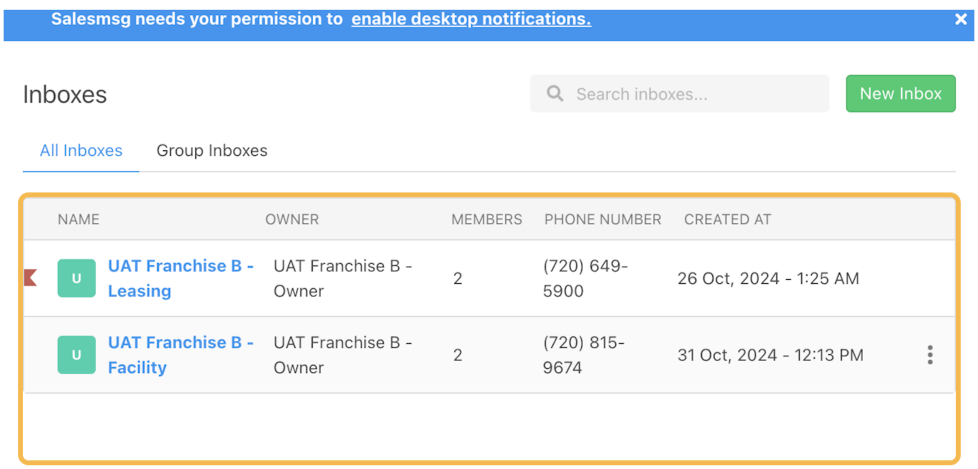
STEP 9

Click on Inboxes



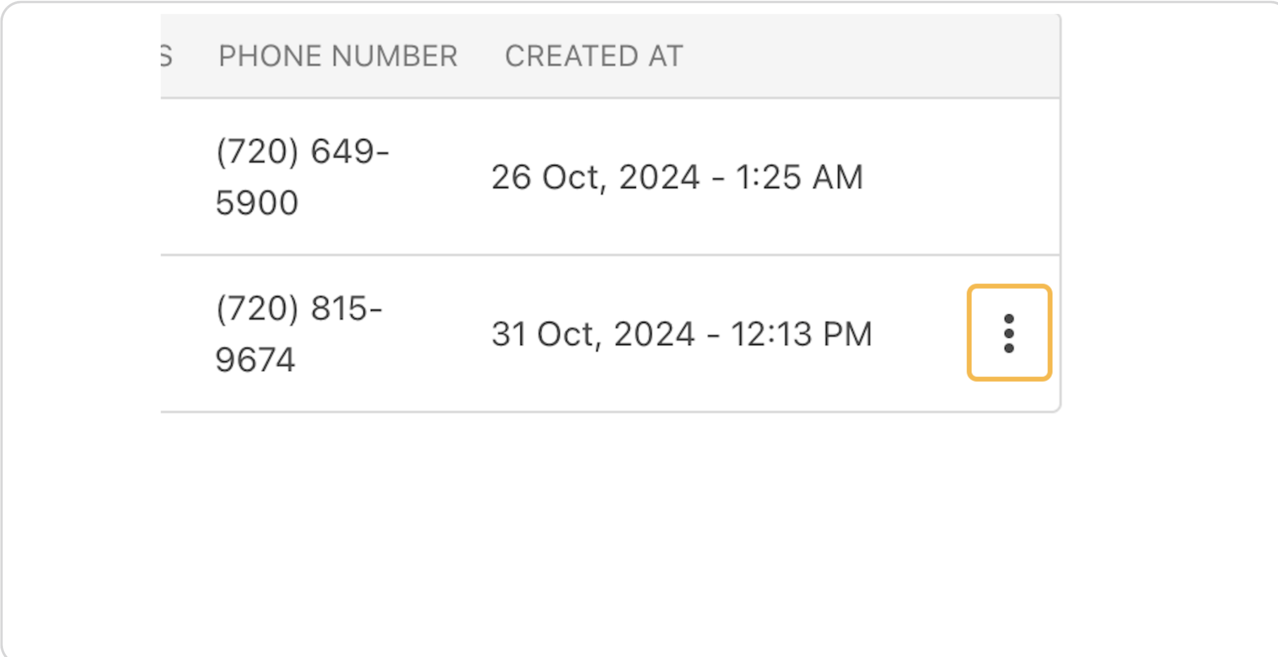
STEP 10

Here you will see your Inboxes



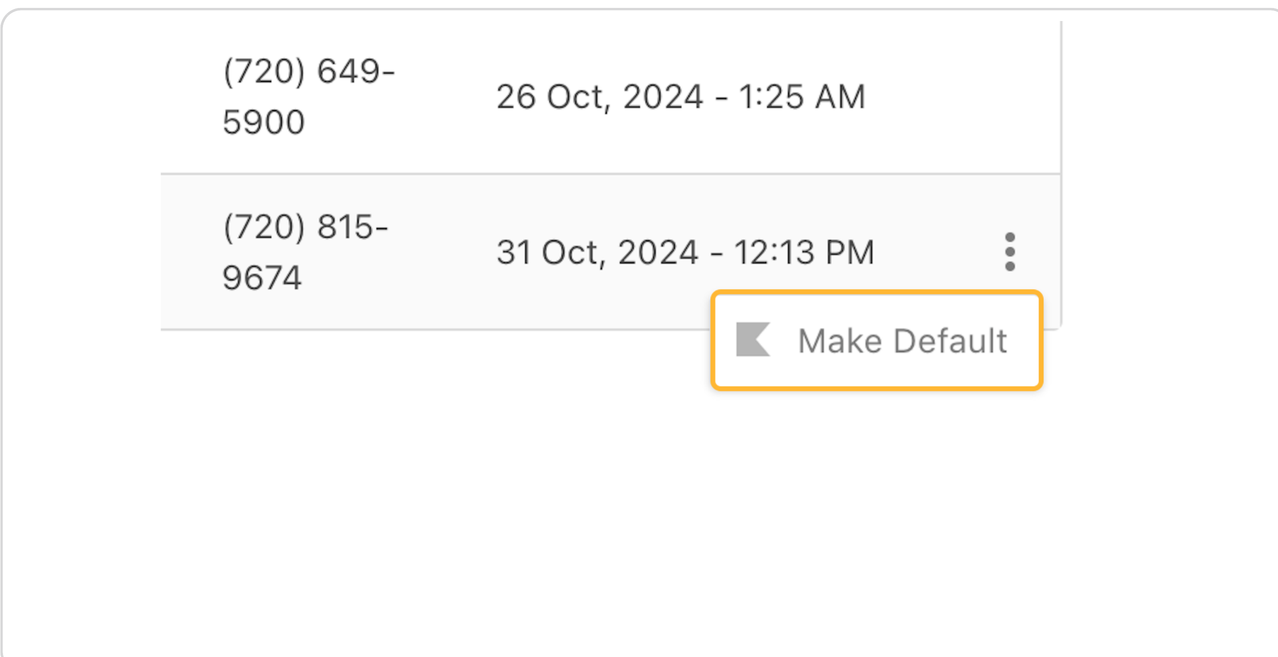
STEP 11

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



STEP 12

Click Make Default



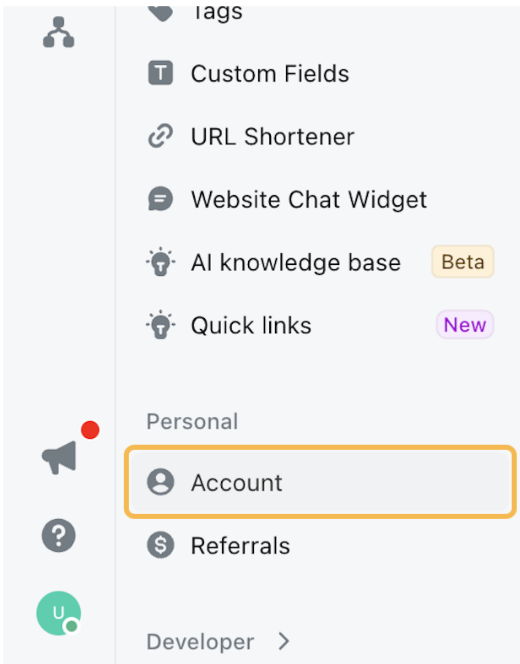
Update Notifications

3 Steps

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

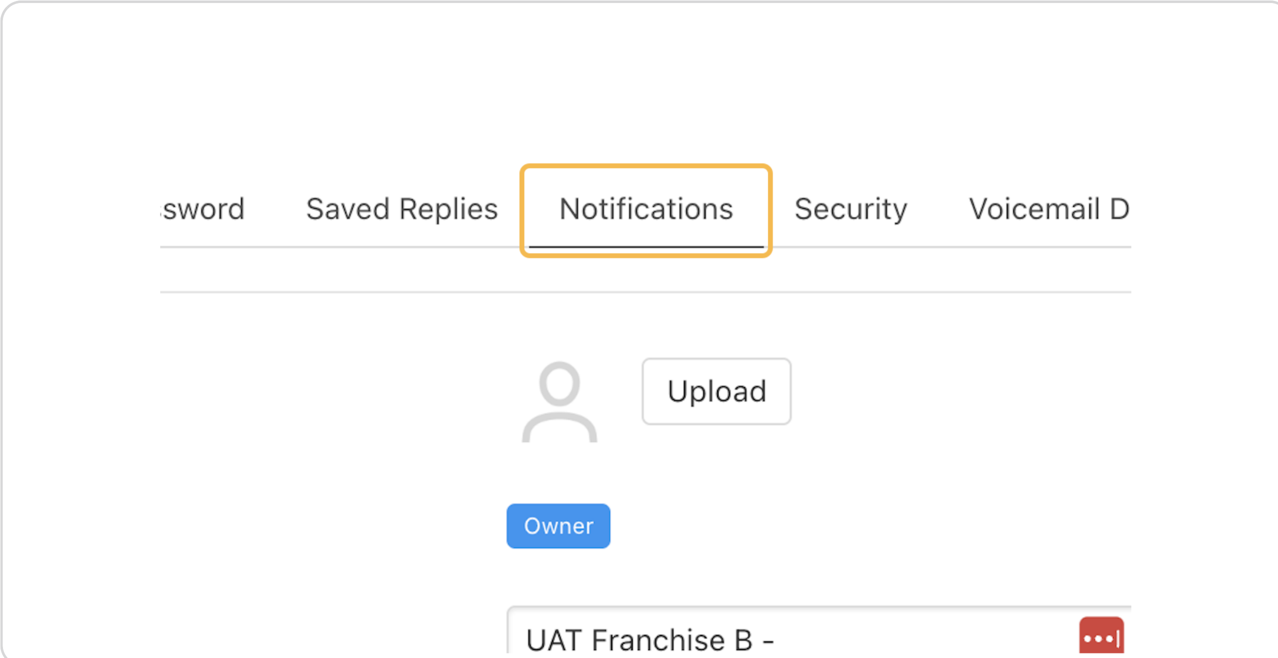
STEP 13

Click on Account within Settings



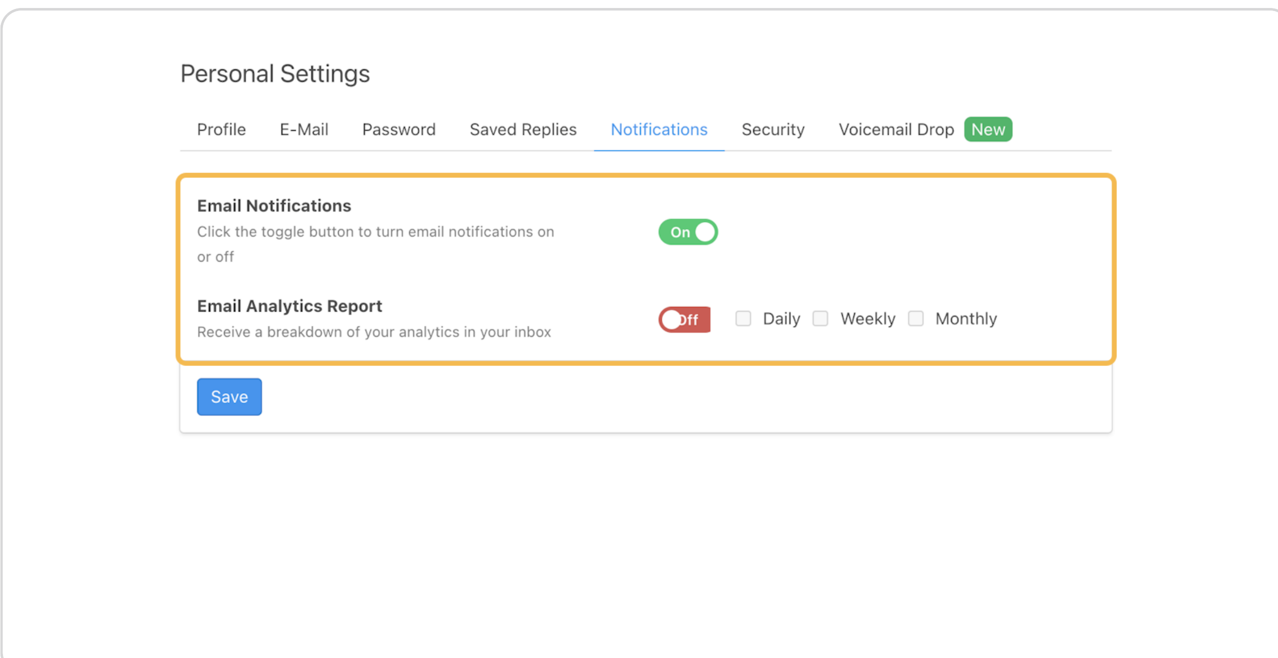
STEP 14

Click on Notifications



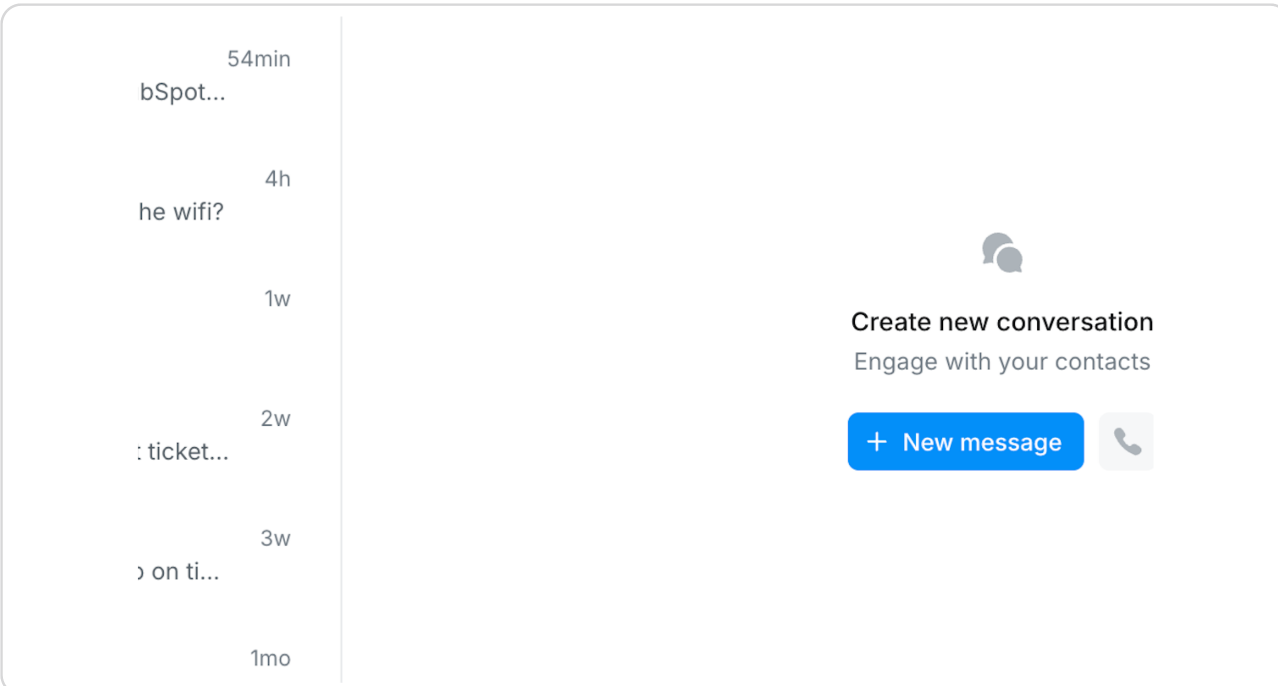
STEP 15

Here you can update your notifications for Email and Analytics Reports



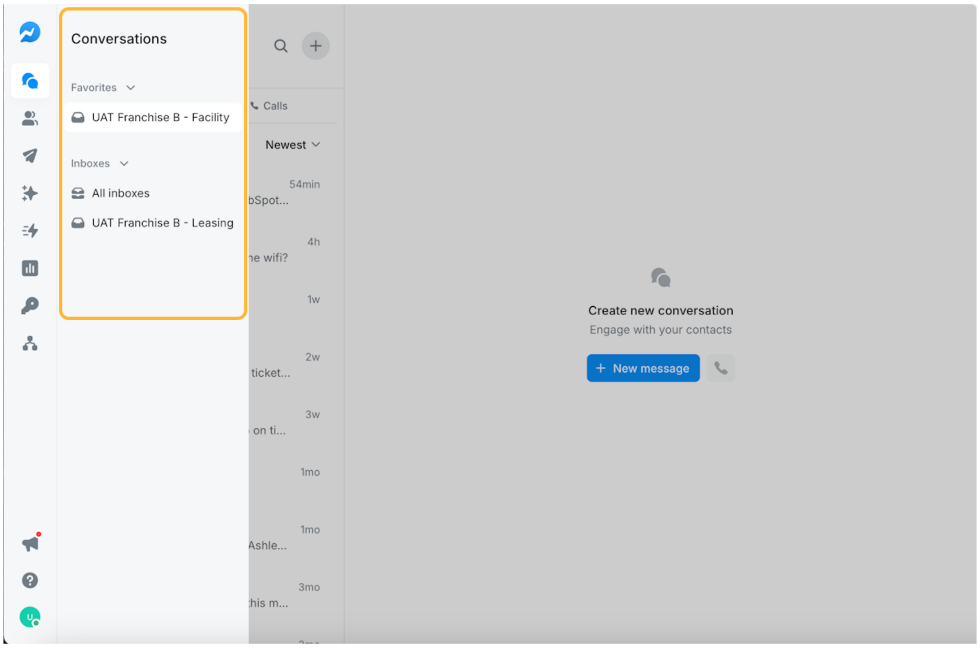
STEP 16

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



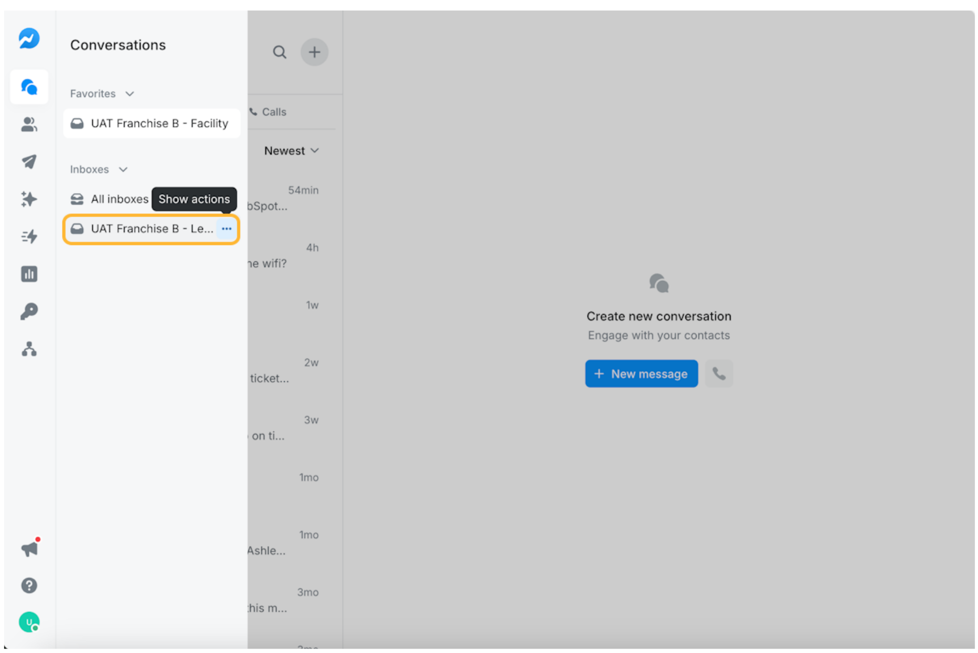
STEP 17

The Menu will Open



STEP 18

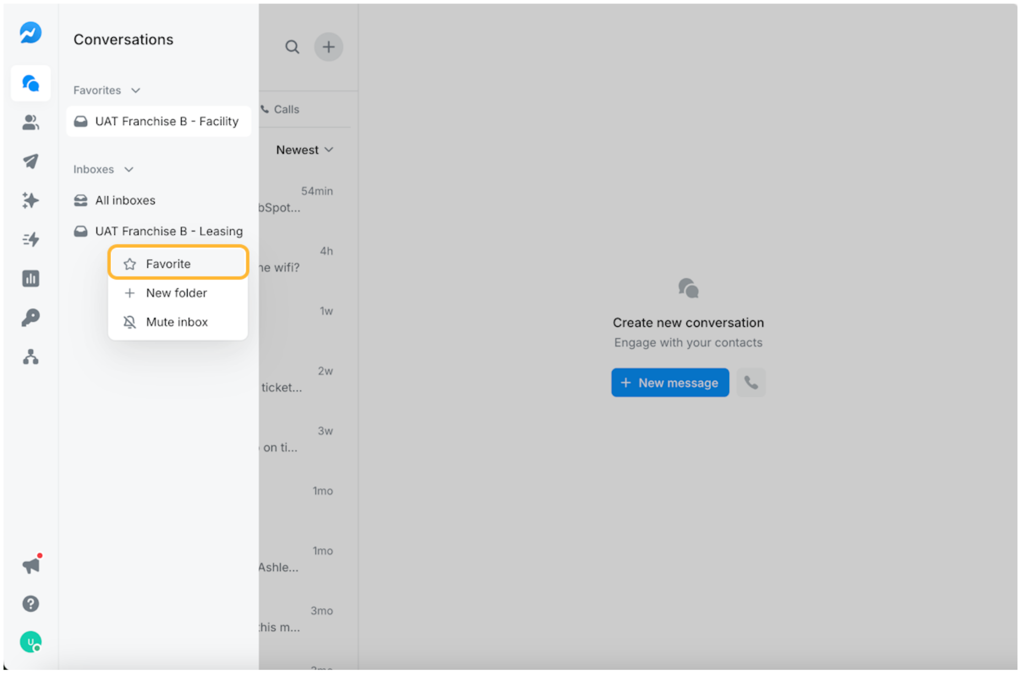
Hover over the location you want to favorite and Click on the 3 dots



STEP 19

Click Favorite

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

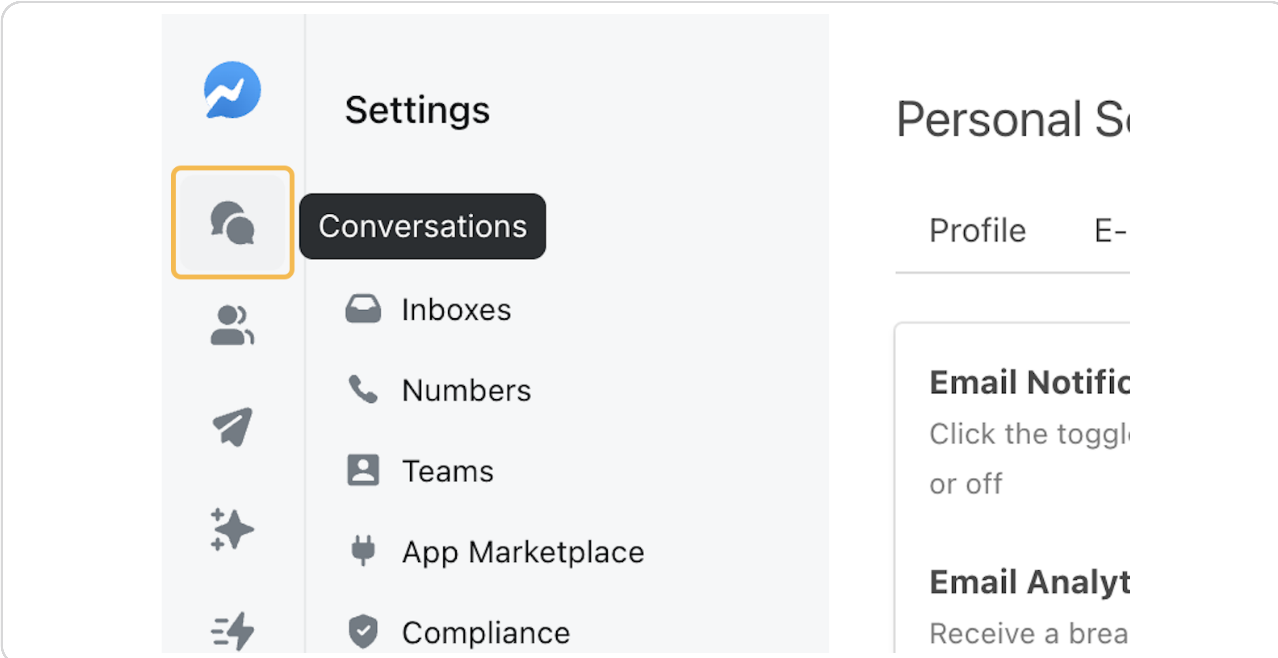


Viewing Message History

3 Steps

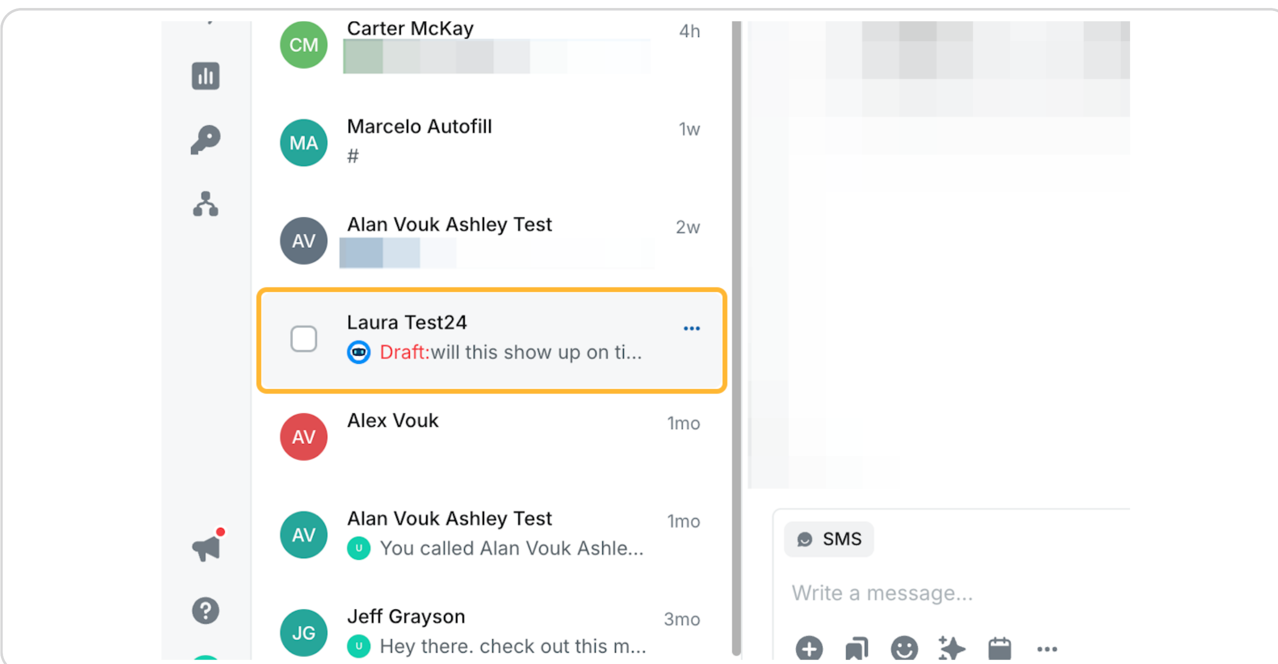
STEP 20

Click on Conversations



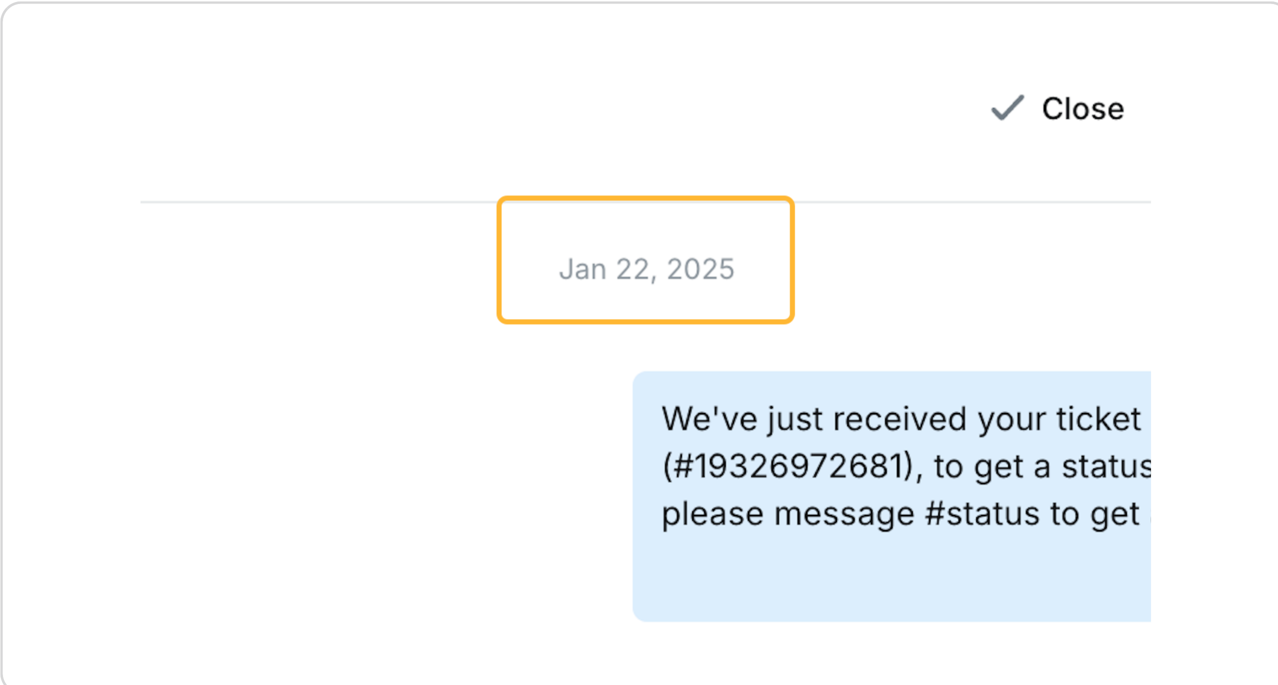
STEP 21

Click on a Conversation



STEP 22

You'll be able to scroll and see message history

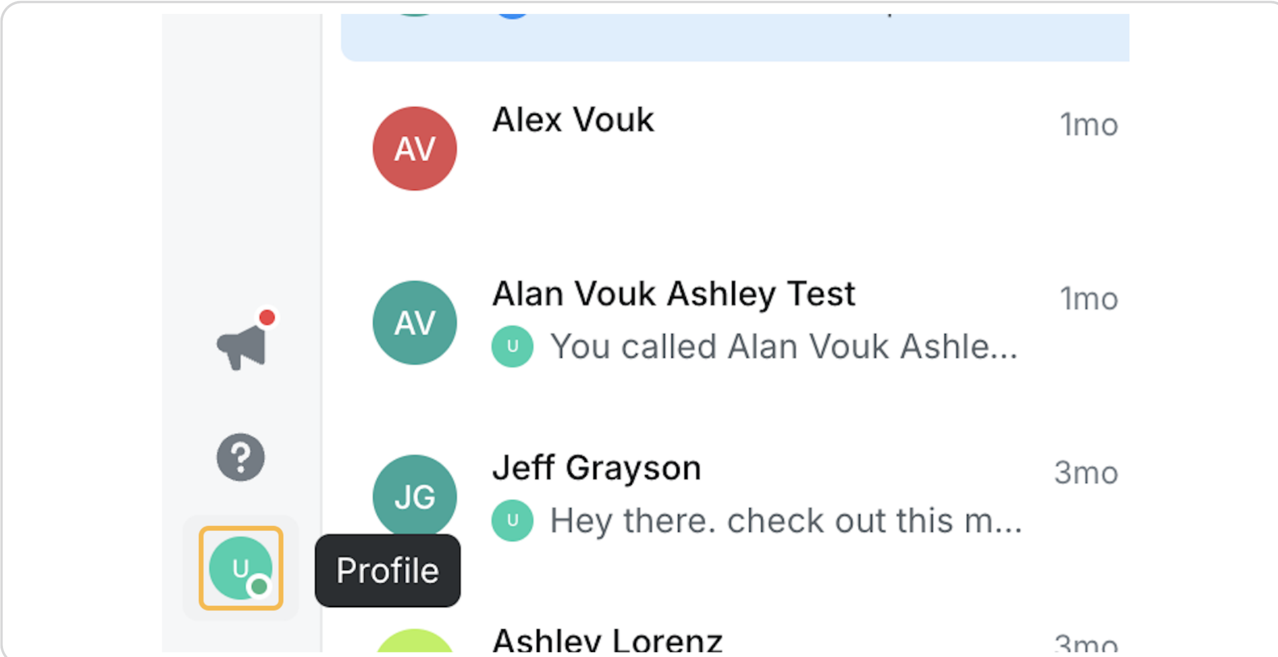


Saved Replies Setup

4 Steps

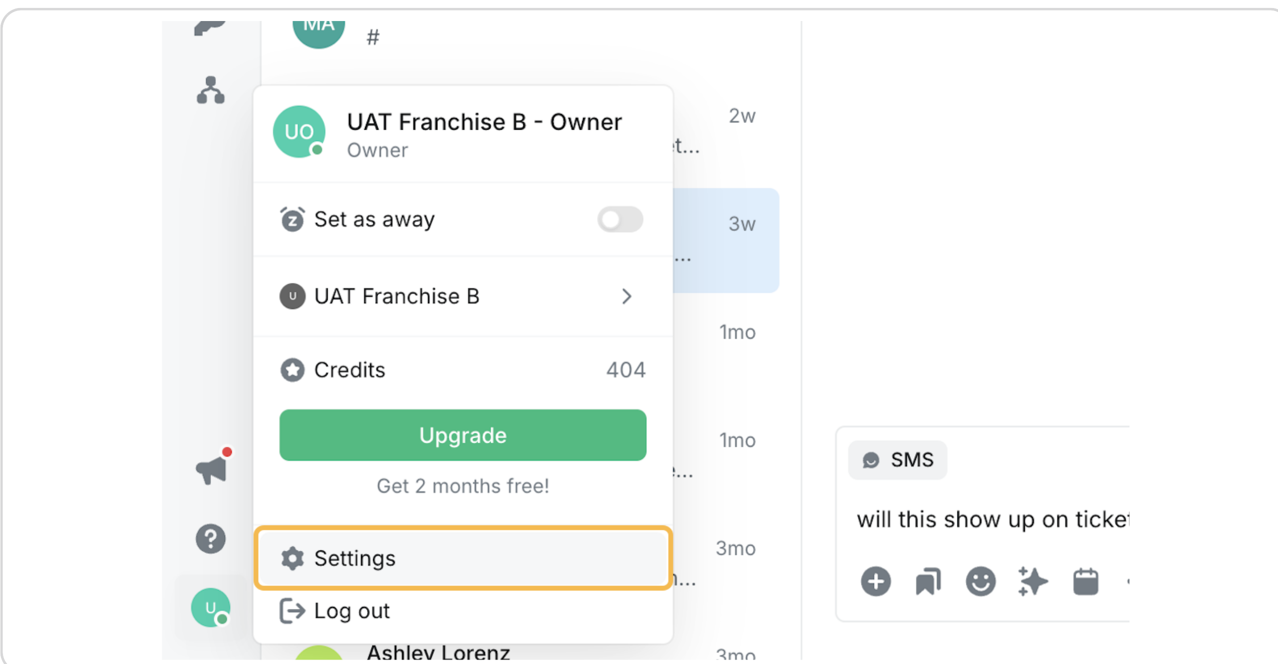
STEP 23

Click on Your Profile



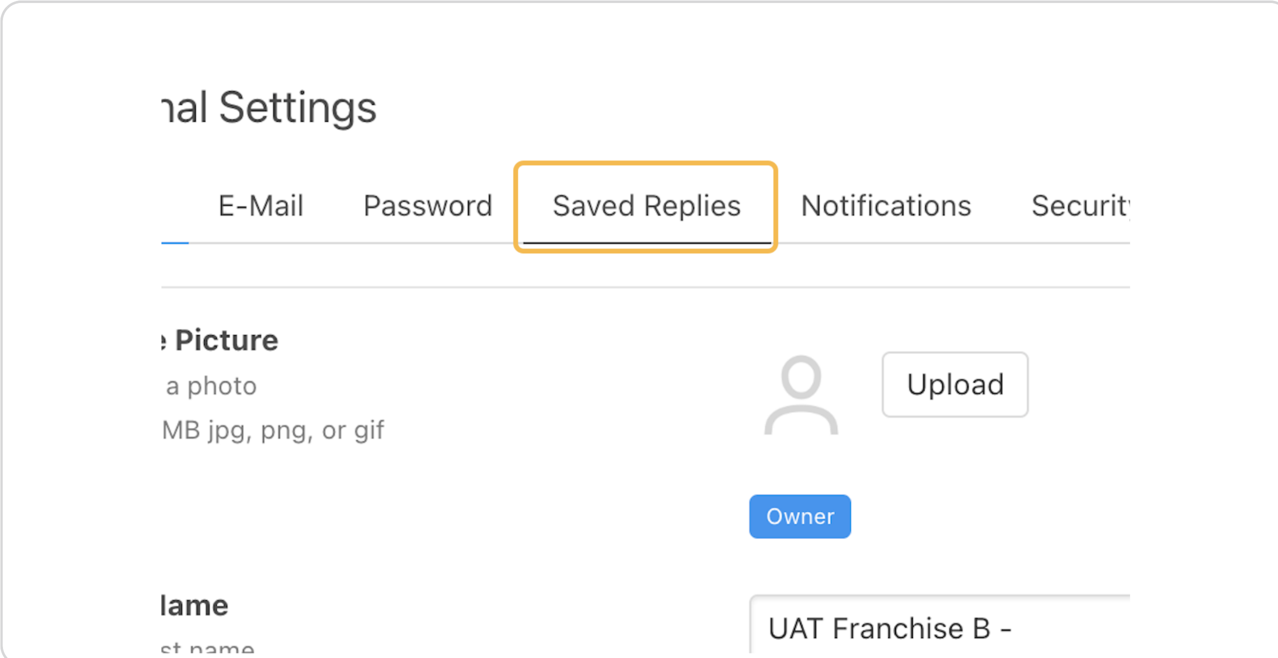
STEP 24

Click on Settings



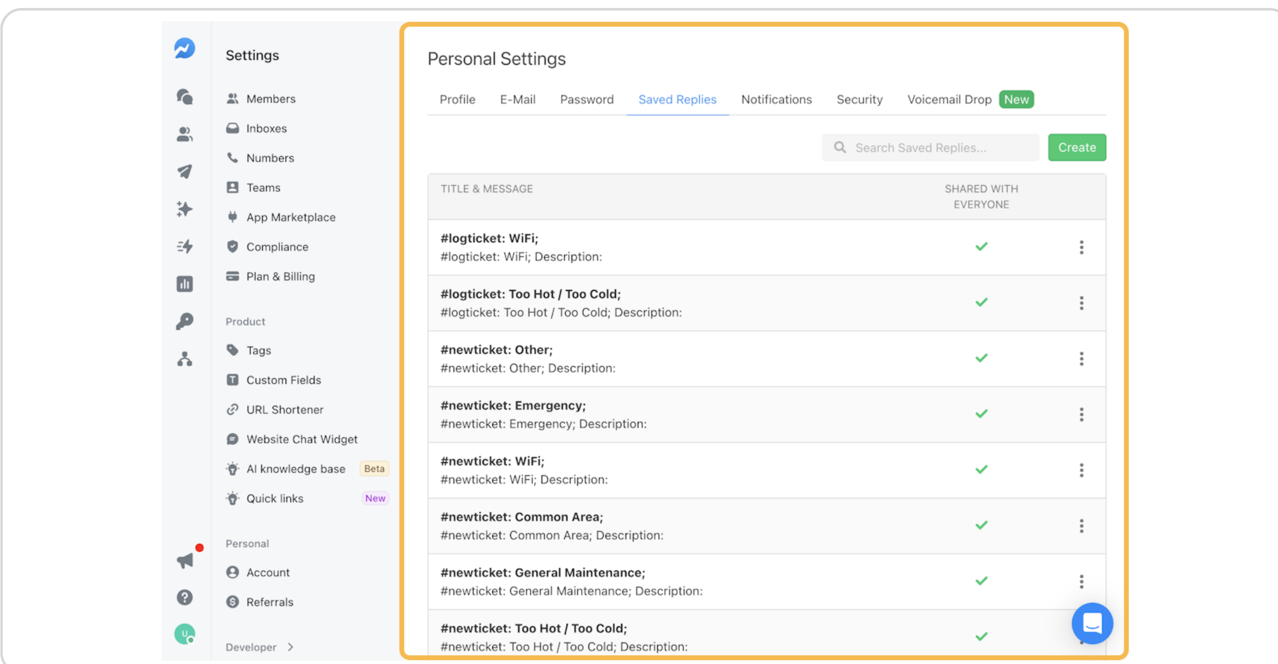
STEP 25

Click on Saved Replies



STEP 26

Here you can manage your Saved Replies



LIFT
Enablement