

Sola Salon Studios - SalesMsg Integration with HubSpot

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

This guide will walk you through points of integration between HubSpot and SalesMsg.

25 Steps [View most recent version](#) 

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Log in to the Desktop Version of SalesMsg

7 Steps

Do's and Don'ts of SalesMsg:

DO:

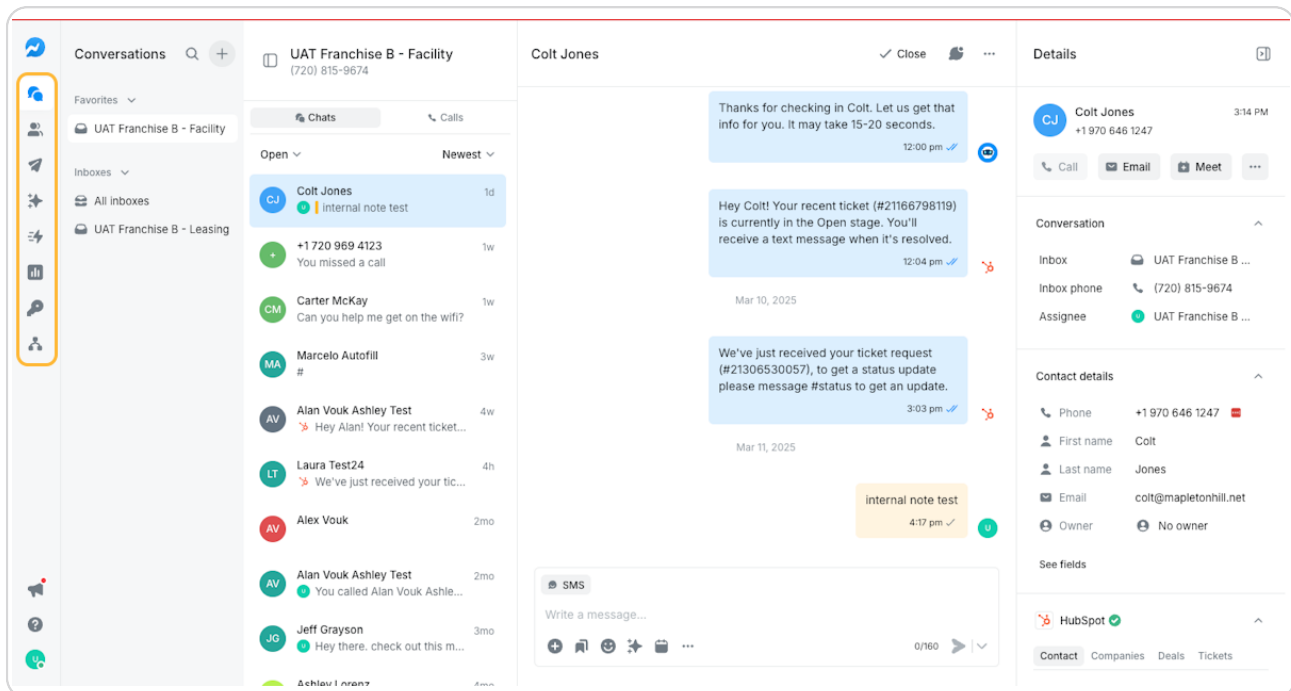
1. Do allow access to your Mic during setup so you can make calls.
2. Do update contacts in HubSpot with Valid Phone Numbers.
3. Do set up your Saved Replies for quicker messaging.

DON'T:

1. Don't sync your phone contacts.
2. Don't update contacts in SalesMsg.

STEP 1

You'll have the primary navigation on the left



STEP 2

Click on Conversations

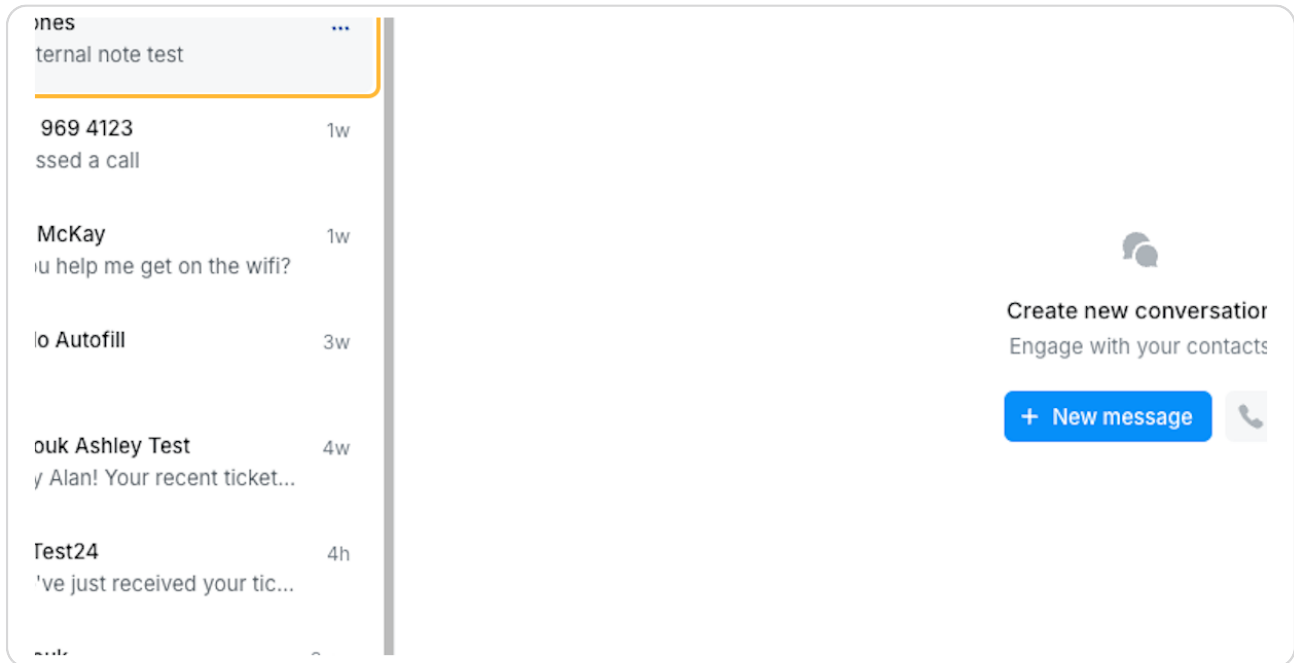
This will show you all of the conversations you have in your inbox.

The screenshot displays the LIFT Enablement interface. On the left sidebar, the 'Conversations' button is highlighted with an orange box. The main content area is divided into three sections:

- Left Panel:** A list of conversations under the heading 'UAT Franchise B - Facility (720) 815-9674'. The list includes entries for 'Colt Jones' (internal note test, 1d), '+1720 969 4123' (You missed a call, 1w), 'Carter McKay' (Can you help me get on the wifi?, 1w), 'Marcelo Autofill' (#, 3w), 'Alan Vouk Ashley Test' (Hey Alan! Your recent ticket..., 4w), 'Laura Test24' (We've just received your tic..., 4h), 'Alex Vouk' (2mo), 'Alan Vouk Ashley Test' (You called Alan Vouk Ashle..., 2mo), and 'Jeff Grayson' (Hey there, check out this m..., 3mo).
- Center Panel:** A detailed view of a conversation with 'Colt Jones'. It shows three messages: 'Thanks for checking in Colt. Let us get that info for you. It may take 15-20 seconds.' (12:00 pm), 'Hey Colt! Your recent ticket (#21166798119) is currently in the Open stage. You'll receive a text message when it's resolved.' (12:04 pm), and 'We've just received your ticket request (#21306530057), to get a status update please message #status to get an update.' (3:03 pm). There is also an 'internal note test' (4:17 pm). At the bottom, there is an 'SMS' section with a text input field and a 'Write a message...' button.
- Right Panel:** A 'Details' section for 'Colt Jones' (+1 970 646 1247). It includes options to 'Call', 'Email', or 'Meet'. Below this, there is a 'Conversation' section with 'Inbox' (UAT Franchise B ...), 'Inbox phone' ((720) 815-9674), and 'Assignee' (UAT Franchise B ...). The 'Contact details' section lists 'Phone' (+1 970 646 1247), 'First name' (Colt), 'Last name' (Jones), 'Email' (colt@mapletonhill.net), and 'Owner' (No owner). At the bottom, there is a 'See fields' section with a 'HubSpot' logo and a list of fields: 'Contact', 'Companies', 'Deals', and 'Tickets'.

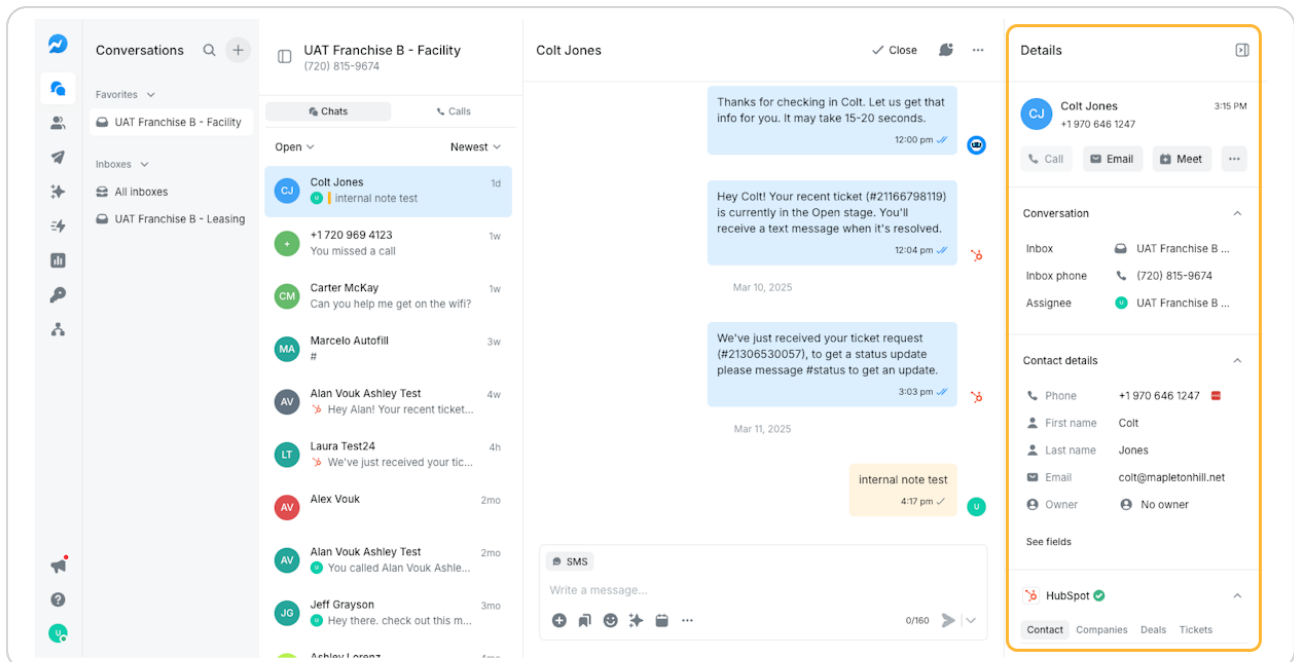
STEP 3

Click on a Conversation



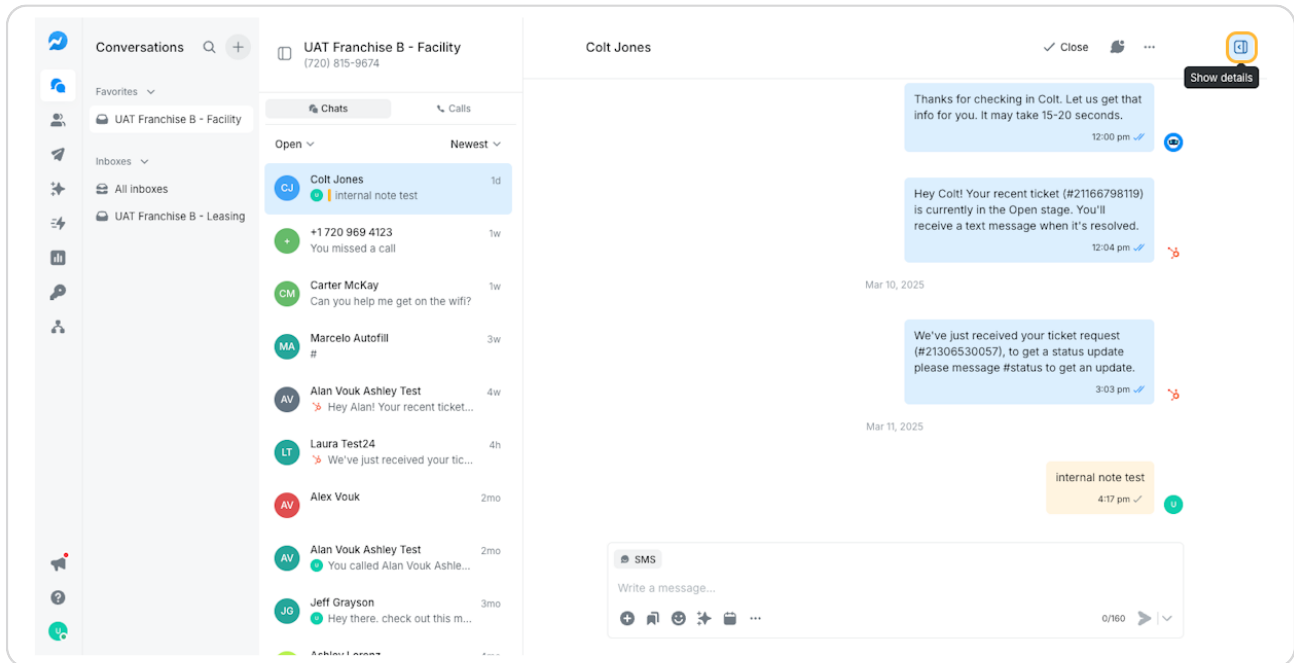
STEP 4

On the right-hand side there will be Details associated with the contact



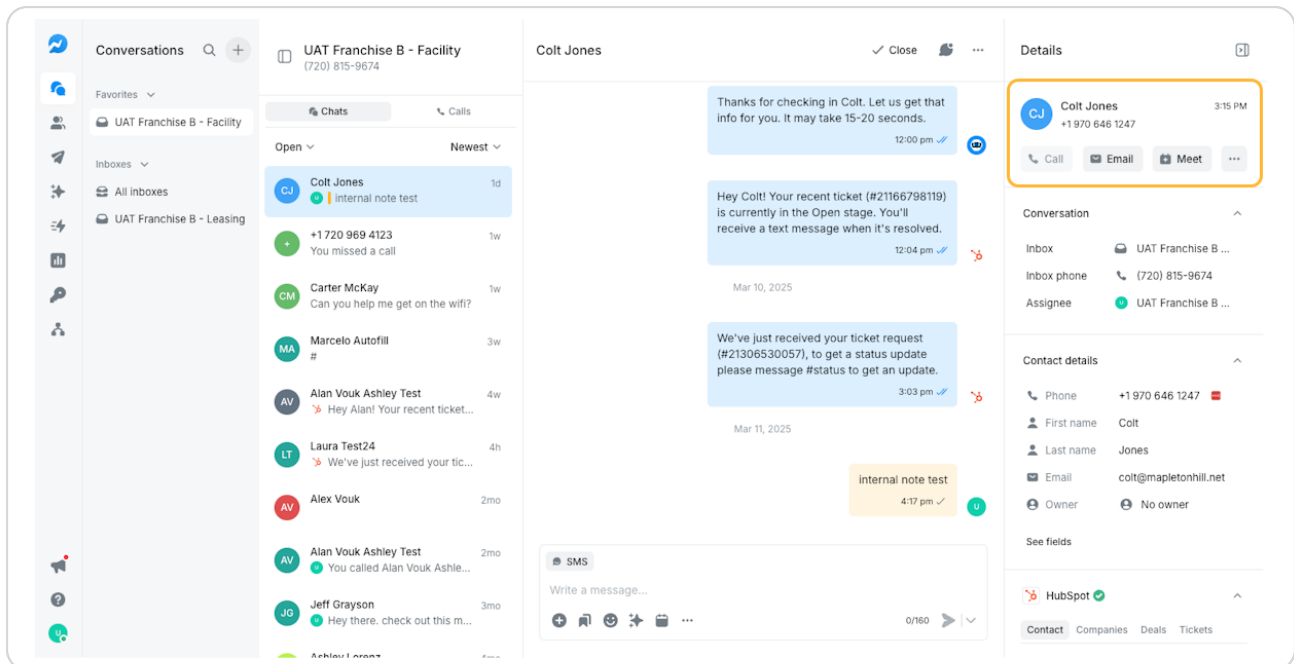
STEP 5

If the Details are hidden, Click on the Show details button



STEP 6

The Details will include the Name of the Contact and the Phone Number.



STEP 7

You'll also see Contact details

The screenshot displays a HubSpot SalesMsg interface. On the left, a conversation thread shows two outgoing messages (blue bubbles) and one internal note (orange bubble). The first message, dated Mar 10, 2025, at 12:04 pm, says: "Hey Colt! Your recent ticket (#21166798119) is currently in the Open stage. You'll receive a text message when it's resolved." The second message, dated Mar 11, 2025, at 3:03 pm, says: "We've just received your ticket request (#21306530057), to get a status update please message #status to get an update." The internal note, dated Mar 11, 2025, at 4:17 pm, says: "internal note test". At the bottom left is an "SMS" input field. On the right, a sidebar contains action buttons (Call, Email, Meet, ...), a "Conversation" dropdown, and a "Contact details" panel. The "Contact details" panel, highlighted with an orange border, lists: Phone (+1 970 646 1247), First name (Colt), Last name (Jones), Email (colt@mapletonhill.net), and Owner (No owner). Below this is a "See fields" link. Further down is a "HubSpot" integration status (checked) and a tabbed menu with "Contact" selected, and "Companies", "Deals", and "Tickets" as options.

HubSpot Information within SalesMsg

18 Steps

STEP 8

Finally, there's a section labelled HubSpot. This holds information coming from HubSpot about the Contact.

Note: If you don't see the information in this section, Click on the arrow next to the section to open it up.

The screenshot displays a customer support interface. On the left is a sidebar with a 'Newest' dropdown and a list of filters: '1d', '1w', '3w', '4w', '4h', '2mo', and '2mo'. The main area shows a message history. The first message is from a user (blue bubble) at 12:00 pm, saying 'Hey Colt! Your recent ticket (#21166798119) is currently in the Open stage. You'll receive a text message when it's resolved.' The second message is from a user (blue bubble) at 12:04 pm, saying 'We've just received your ticket request (#21306530057), to get a status update please message #status to get an update.' Below these is an 'internal note test' (orange bubble) at 4:17 pm. On the right is a 'Contact details' panel for 'Colt Jones'. It includes fields for 'Create Date' (Wed Dec 18th, 2024 a...), 'Email' (colt@mapletonhill.net), 'Hs Object Id' (86016387189), 'Location' (Clovis East), and 'Appointment ...'. There is a '+ Add property' button. The panel is highlighted with an orange border.

STEP 9

If you open the HubSpot card and don't see any information on the Contact, Click on Add property

status update
get an update.
3:03 pm ✓

external note test
4:17 pm ✓

Hs Object Id86016387189

LocationClovis East

Appointment ...-

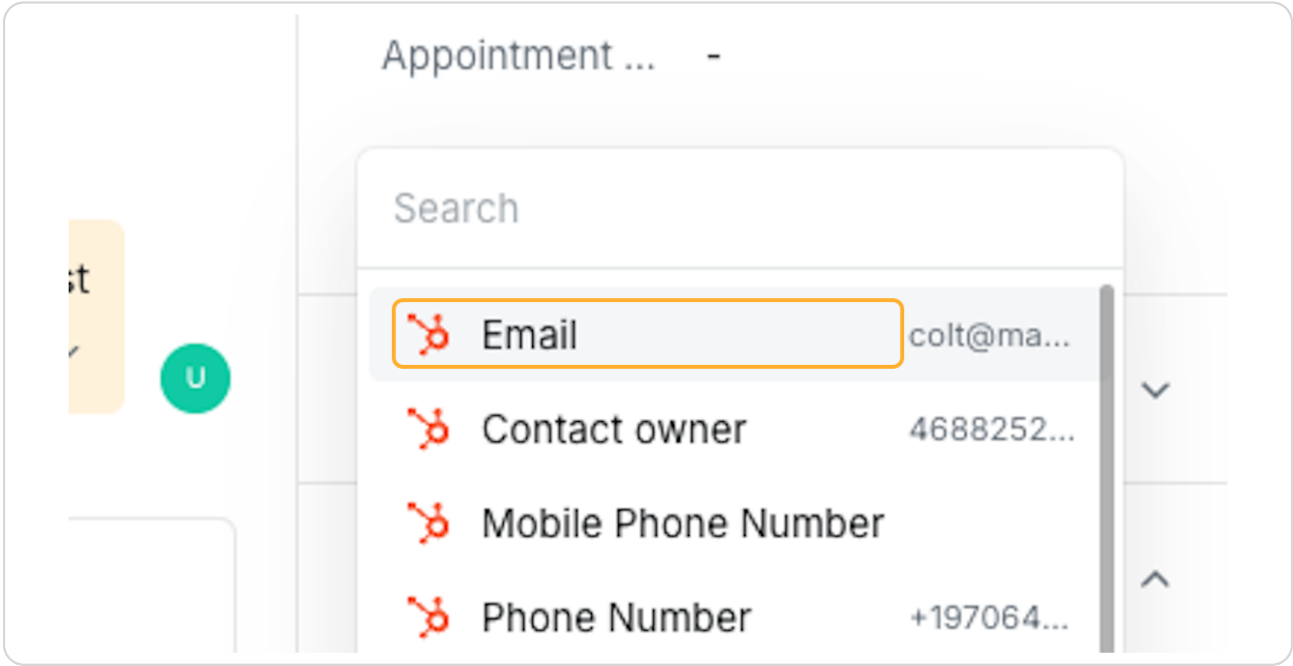
+ Add property

Tags

Notes

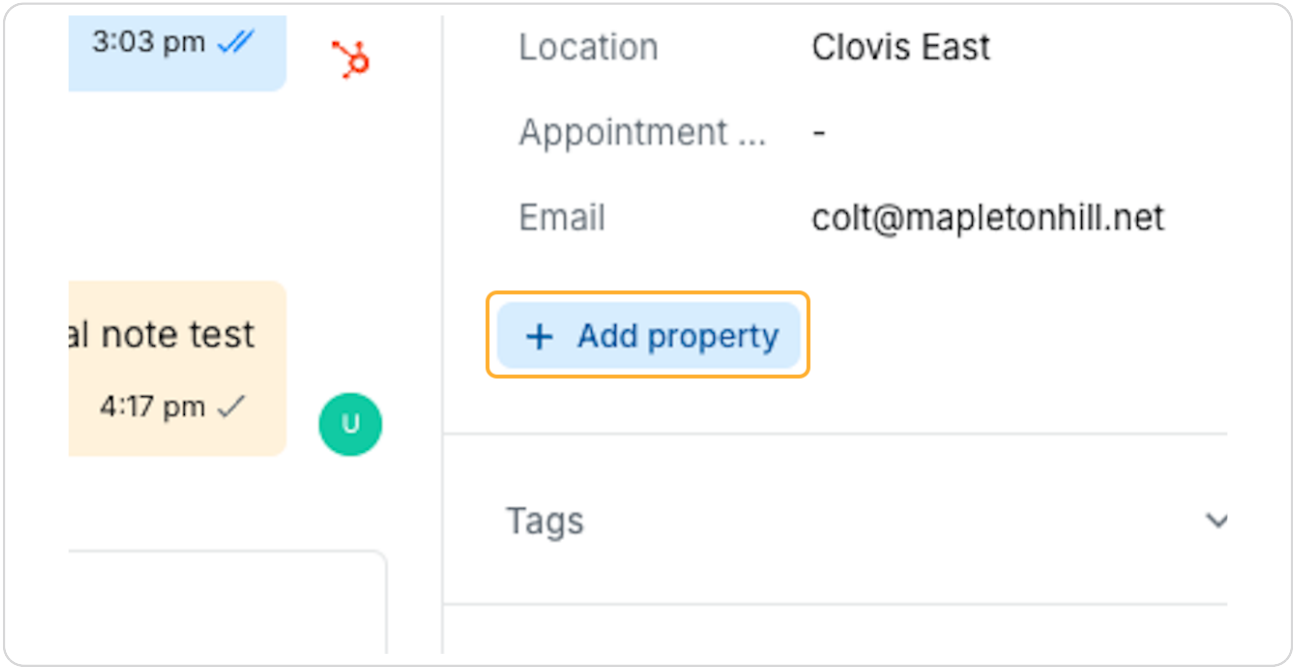
STEP 10

Search for and Click on Email



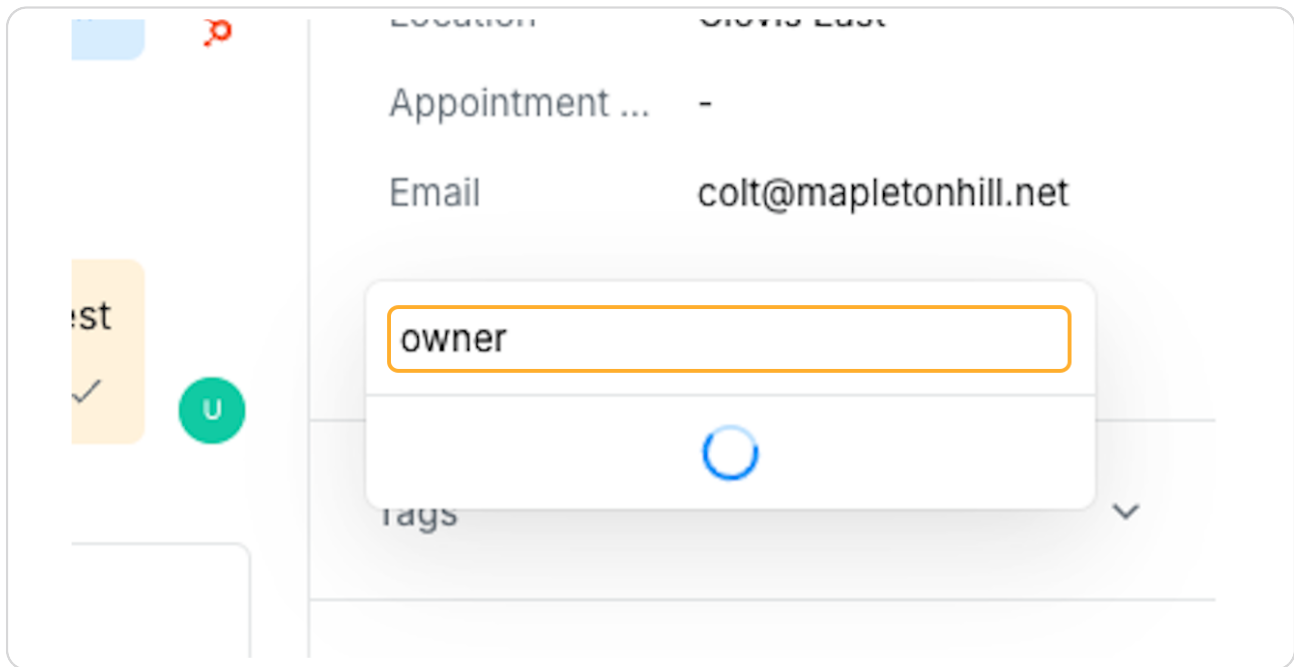
STEP 11

Click on Add property



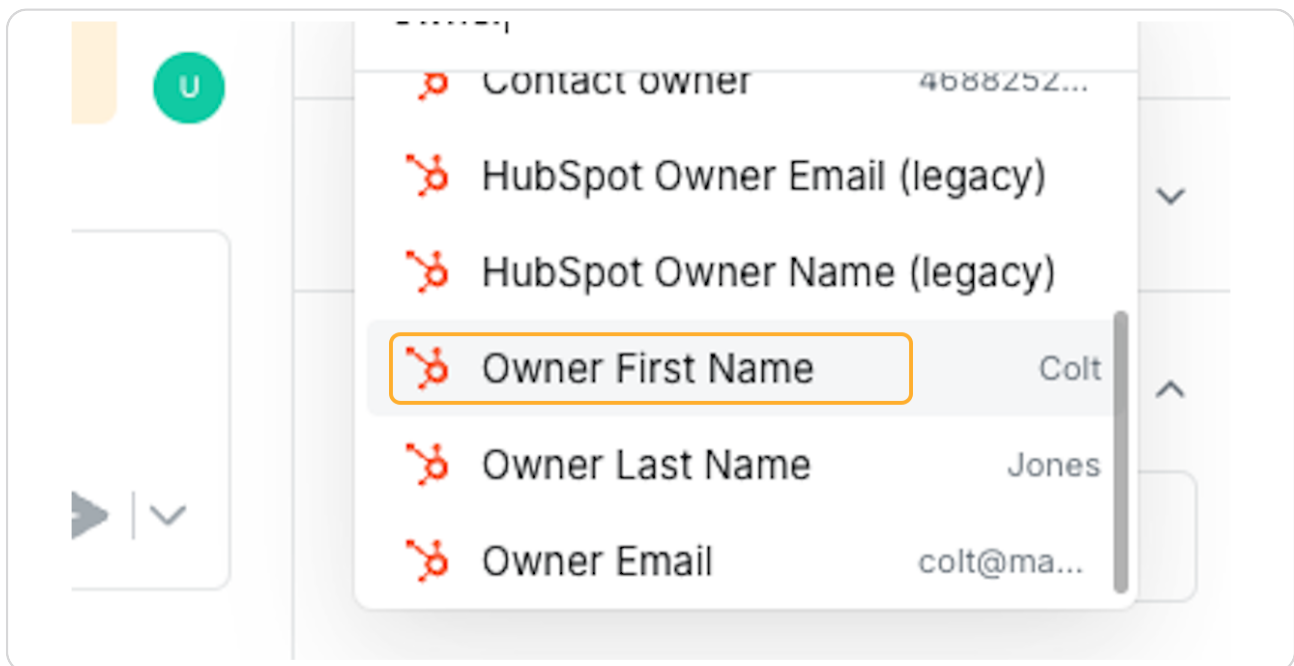
STEP 12

Search for the property you'd like



STEP 13

Click on the property



STEP 14

Any properties within HubSpot can be added here

Note: If you adjust the properties you see, you will not change what someone else sees on their side.

The screenshot displays a HubSpot interface with a conversation timeline on the left and a contact details sidebar on the right. The timeline shows messages from a contact named Colt Jones, including a message about a ticket status and an internal note. The contact details sidebar lists various properties for Colt Jones, such as Create Date, Hs Object Id, Location, Appointment, and Email. A red box highlights the contact details sidebar.

Conversation Timeline:

- 12:00 pm ✓ (Colt Jones)
- 12:04 pm ✓ (Colt Jones): Hey Colt! Your recent ticket (#21166798119) is currently in the Open stage. You'll receive a text message when it's resolved.
- Mar 10, 2025
- 3:03 pm ✓ (Colt Jones): We've just received your ticket request (#21306530057), to get a status update please message #status to get an update.
- Mar 11, 2025
- 4:17 pm ✓ (Internal Note): internal note test

Contact Details Sidebar (Colt Jones):

- Create Date: Wed Dec 18th, 2024 a...
- Hs Object Id: 86016387189
- Location: Clovis East
- Appointment ...: -
- Email: colt@mapletonhill.net
- + Add property

STEP 15

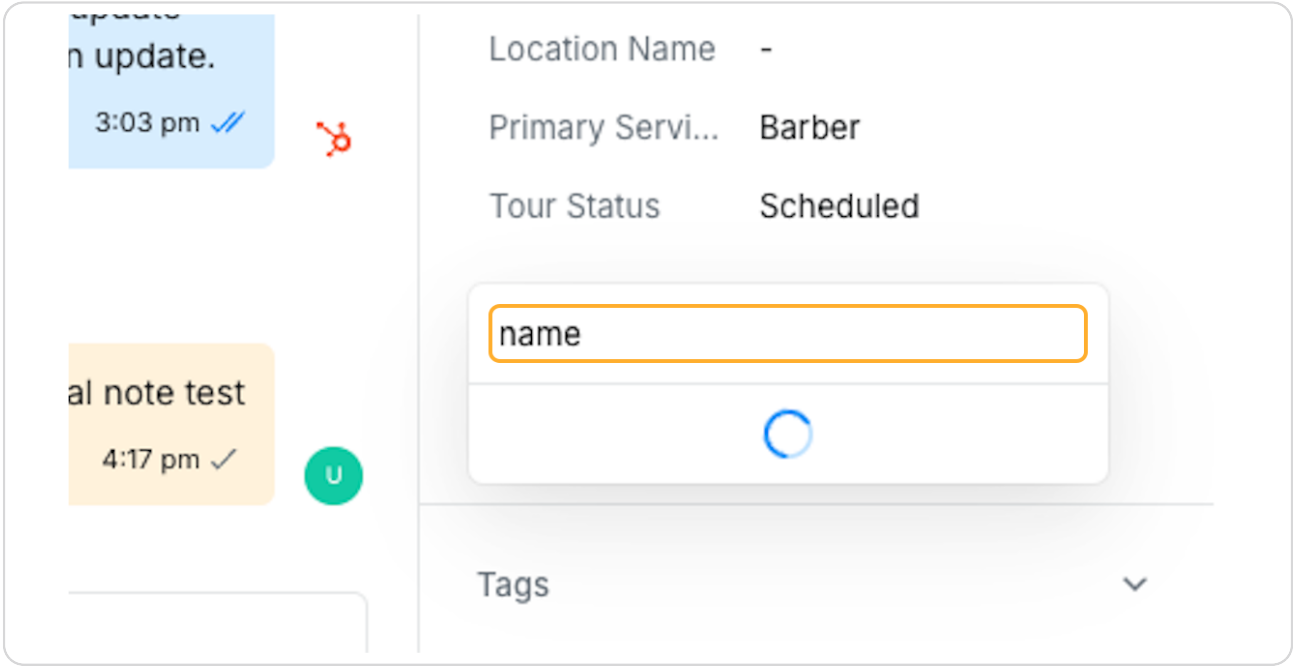
Click on Deals and Click on Add property

You can add properties for Deals like we did for the Contact.

The screenshot displays a HubSpot interface. On the left, a chat window shows two messages from a contact named 'Colt Test'. The first message, dated Mar 10, 2025, at 12:04 pm, says: 'Hey Colt! Your recent ticket (#21166798119) is currently in the Open stage. You'll receive a text message when it's resolved.' The second message, dated Mar 11, 2025, at 3:03 pm, says: 'We've just received your ticket request (#21306530057), to get a status update please message #status to get an update.' Below these is an internal note dated Mar 11, 2025, at 4:17 pm, which says 'internal note test'. On the right, the HubSpot sidebar is visible. The 'Deals' tab is selected and highlighted with an orange box. Below the tabs, the contact name 'Colt Test' is shown. A list of properties includes 'Deal Stage' (257251949), 'Location Name' (-), 'Primary Servi...' (Barber), and 'Tour Status' (Scheduled). The '+ Add property' button is highlighted with an orange box. Below this is a 'See all deals' link. At the bottom of the sidebar, there is a 'Tags' section with a dropdown arrow.

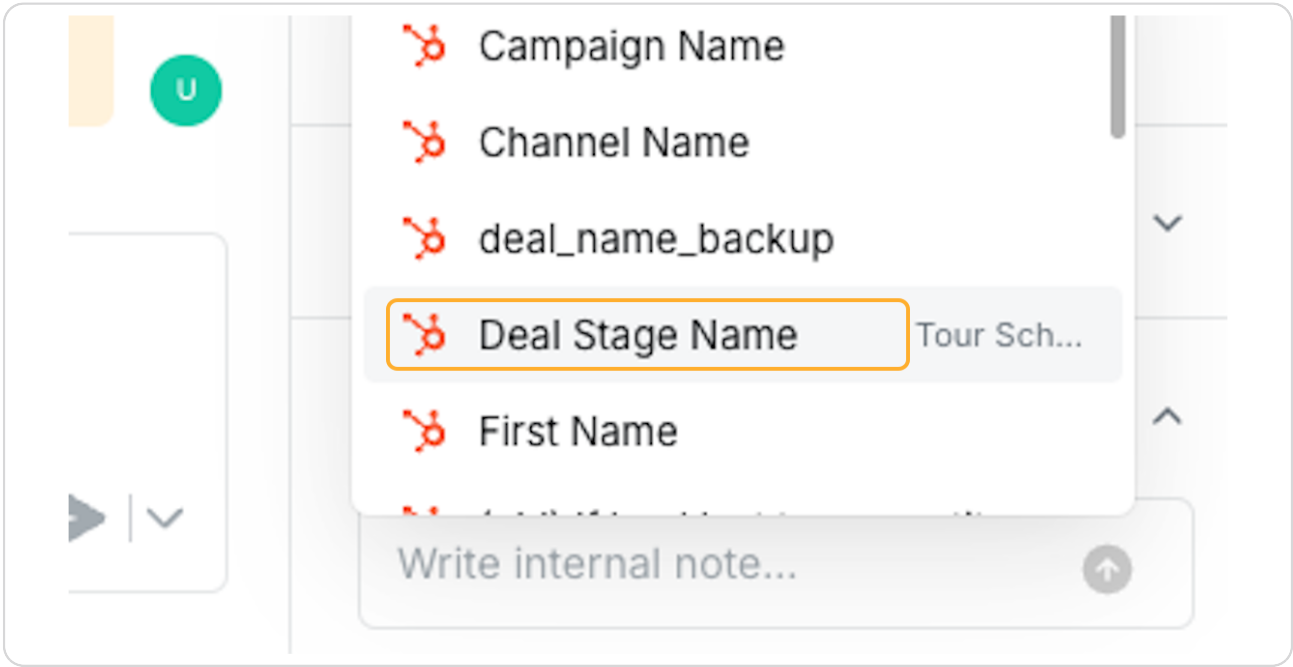
STEP 16

Search for the property



STEP 17

Click on the property



STEP 18

Once added, you'll see all of the properties you added in the view

#newticket: Common Area;

Description: 5/29 test
5:18 am ✓

Thanks for opening a ticket, here's your ticket number for reference: #24774730366.

If you need an update on your ticket please text back with #status.
5:22 am ✓

ContactCompaniesDeals1Tickets

Colt Test

Create DateMon May 5th at 4:41pm

Primary Servi...Barber

Location NameCRM Demo

Tour Status-

Deal Stage N...Connected

+ Add property

Tags ^

STEP 19

If there are multiple Deals associated with the Contact, Click on See all deals

U

Create DateWed Dec 18th, 2024 a...

+ Add property

Hide properties

See all deals

Tags v

STEP 20

You'll be able to see all of the Deals associated with the Contact

The screenshot shows a CRM interface with a sidebar on the left containing navigation icons and a list of contacts. The main area displays a conversation with 'Colt Jones' (720) 815-9674. The conversation history includes several messages: 'Thanks for checking in Colt. Let us get that info for you. It may take 15-20 seconds.' (12:00 pm), 'Hey Colt! Your recent ticket (#21166798119) is currently in the Open stage. You'll receive a text message when it's resolved.' (12:04 pm), and 'We've just received your ticket request (#21306530057), to get a status update please message #status to get an update.' (3:03 pm). There are also internal notes and an SMS section at the bottom. On the right, a 'Deals 3' panel is highlighted with an orange border, showing details for three deals: 'Colt Test', 'Colts test', and 'Colt Jones 2/25 DEAL'. Each deal entry includes fields for Primary Service, Deal Stage, Deal Stage Name, Create Date, and Tour Status.

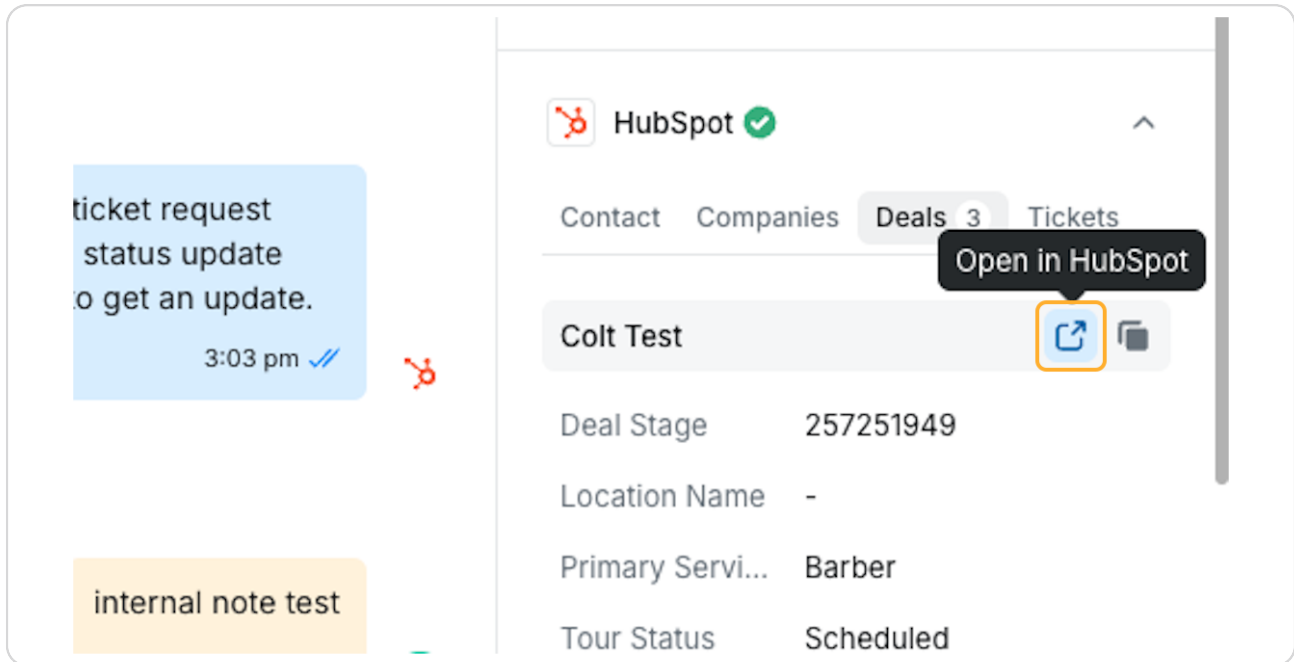
STEP 21

Click on the Back button to see the Contact Details again

This screenshot shows a zoomed-in view of the CRM interface. A red bar at the top contains an 'Update' button. Below it, the conversation with 'Colt Jones' is visible. A 'Deals 3' button is highlighted with an orange box, and a 'Back' button is shown below it. The 'Back' button is a black rectangle with white text. The 'Deals 3' button is a white rectangle with a blue back arrow icon and a red icon. The 'Close' button is also visible. The conversation history shows the same messages as in the previous screenshot. The 'Deals 3' panel on the right shows the details for the 'Colt Test' deal, including Primary Service (Barber), Deal Stage (257251949), Deal Stage Name (Tour Scheduled), Create Date (Wed Dec 18th, 2024), and Tour Status (Scheduled).

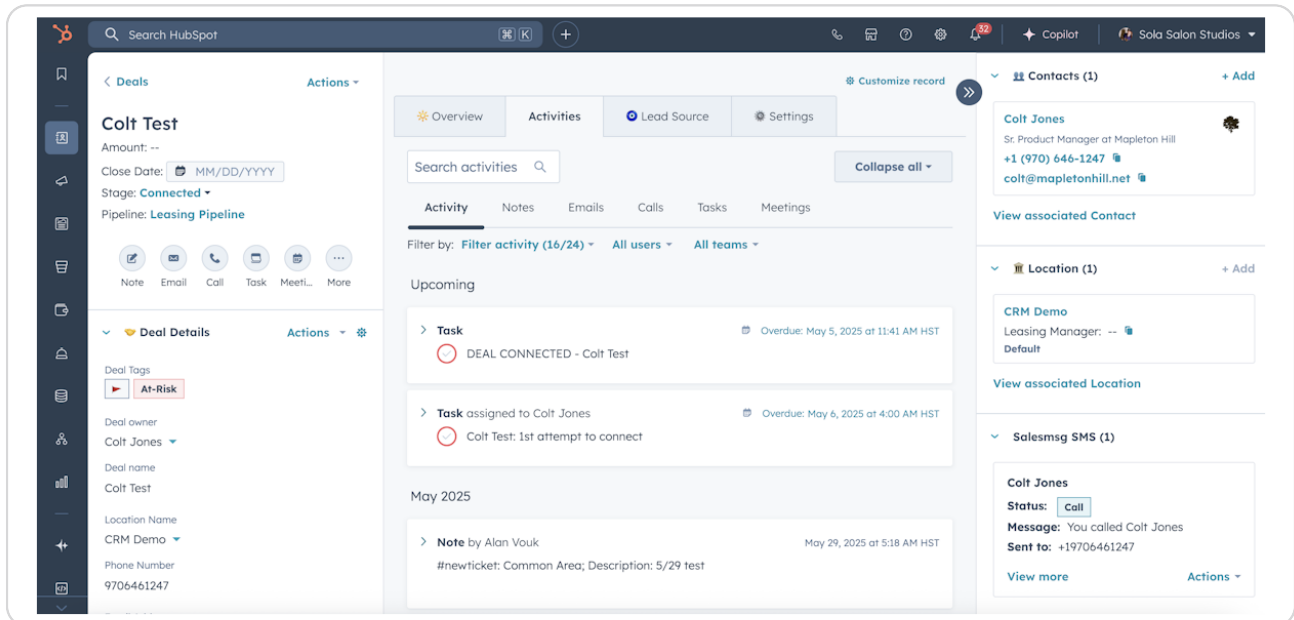
STEP 22

You are able to jump into HubSpot from SalesMsg. On the Deals section of the HubSpot card, hover over the Deal Name and Click Open in HubSpot



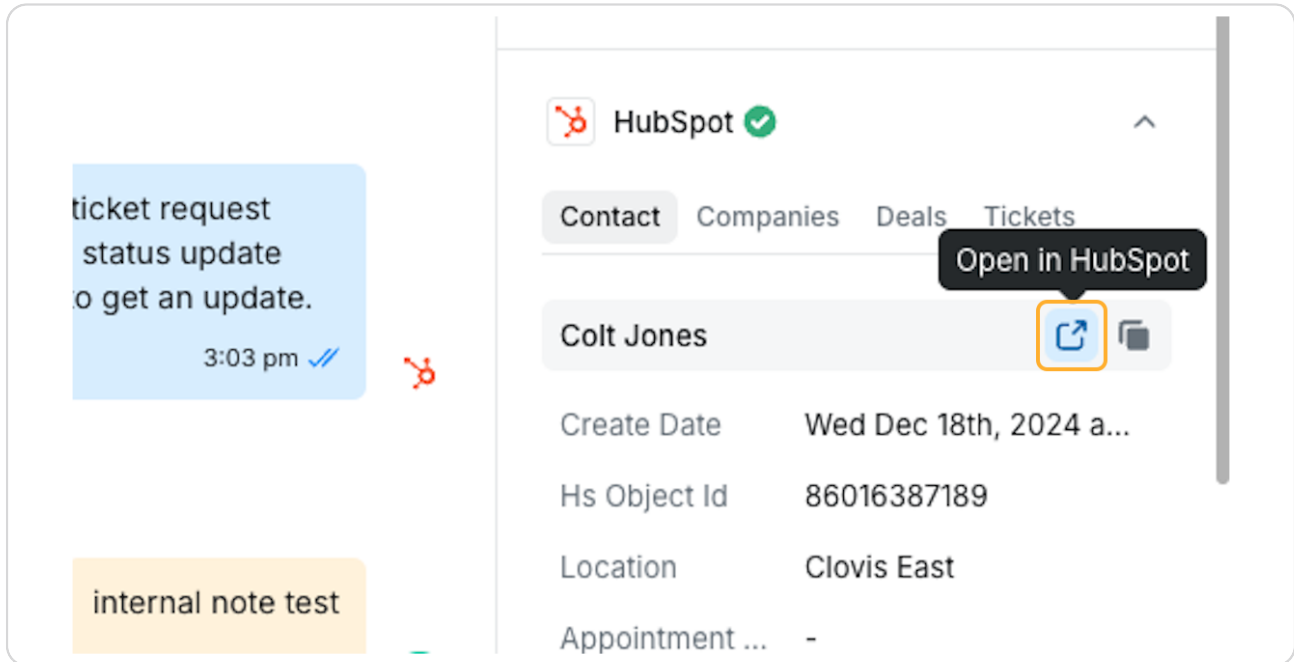
STEP 23

You'll be taken into the Deal record within HubSpot



STEP 24

The same thing happens if we are on the Contact section of the HubSpot.
Hover over the Contact Name and Click Open in HubSpot



STEP 25

You'll be taken to the Contact record within HubSpot

