

Sola Salon Studios - SalesMsg Texting and Calling

Texting and Calling are core functionalities of SalesMsg. Messages will sync to HubSpot deal cards. This guide will walk you through:

- Texting
 - Saved Replies
 - Contact Card
 - Internal Notes
- Calling
 - Contacts
 - Broadcasts
 - Keywords

68 Steps [View most recent version](#) 

Created by

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Creation Date

Feb 27, 2025

Last Updated

Mar 12, 2025

Texting

Jump into SalesMsg.

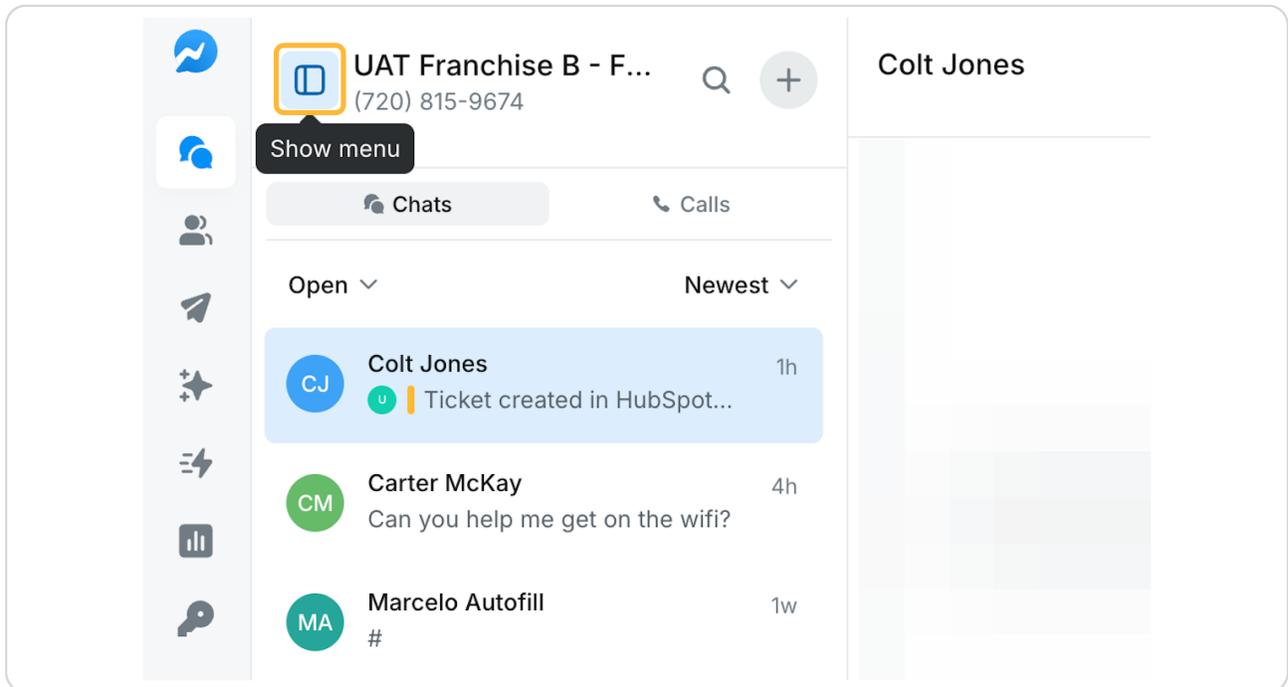
Note: Calls and messages are mixed in the conversation feed.

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

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

STEP 1

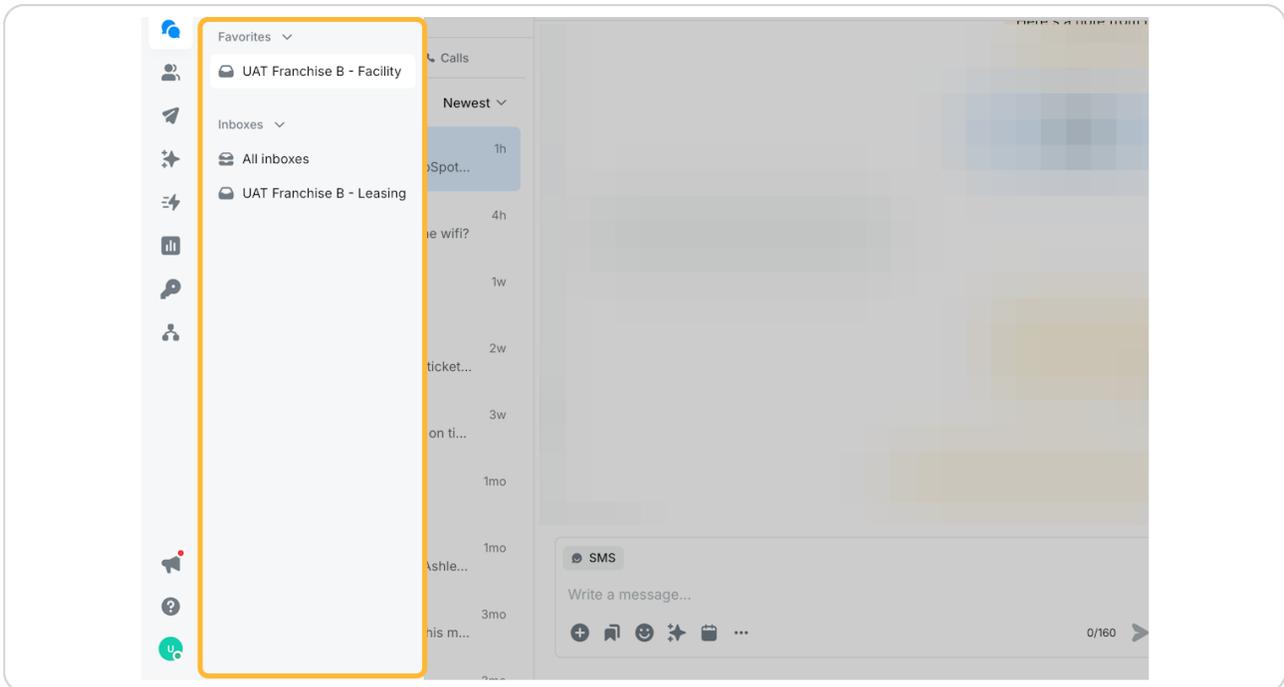
Click on the Menu



STEP 2

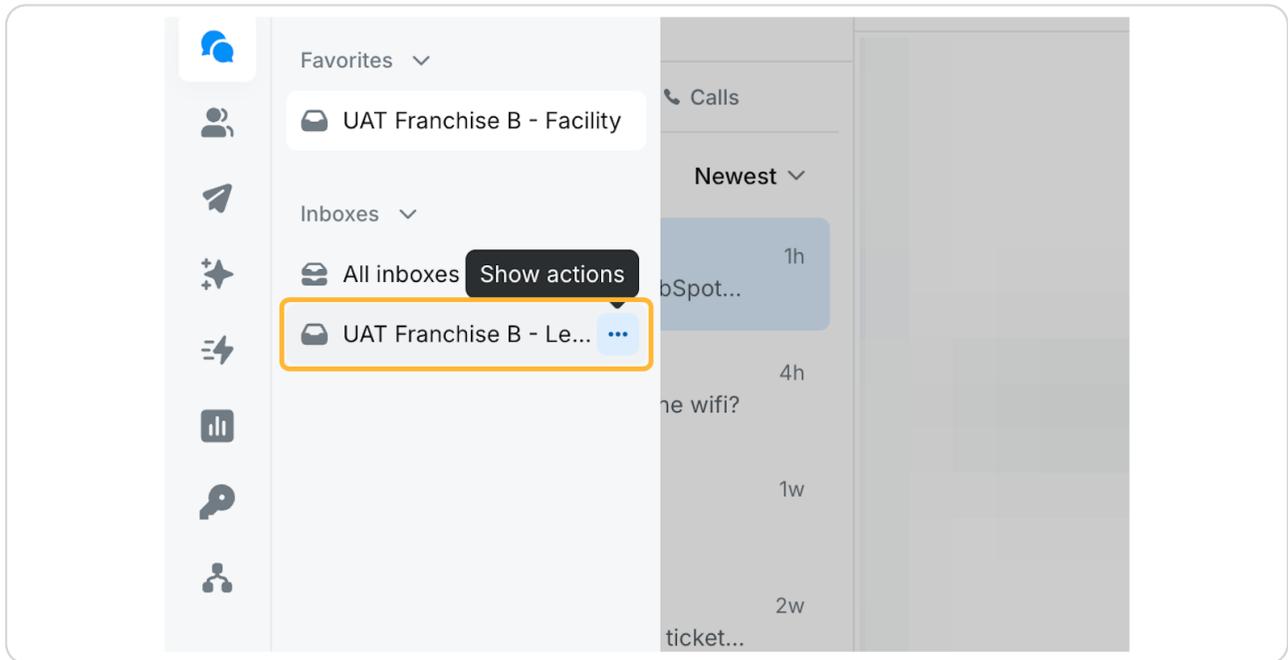
The Menu will populate

This will show you your favorite locations within Conversations along with the Inboxes you are part of.



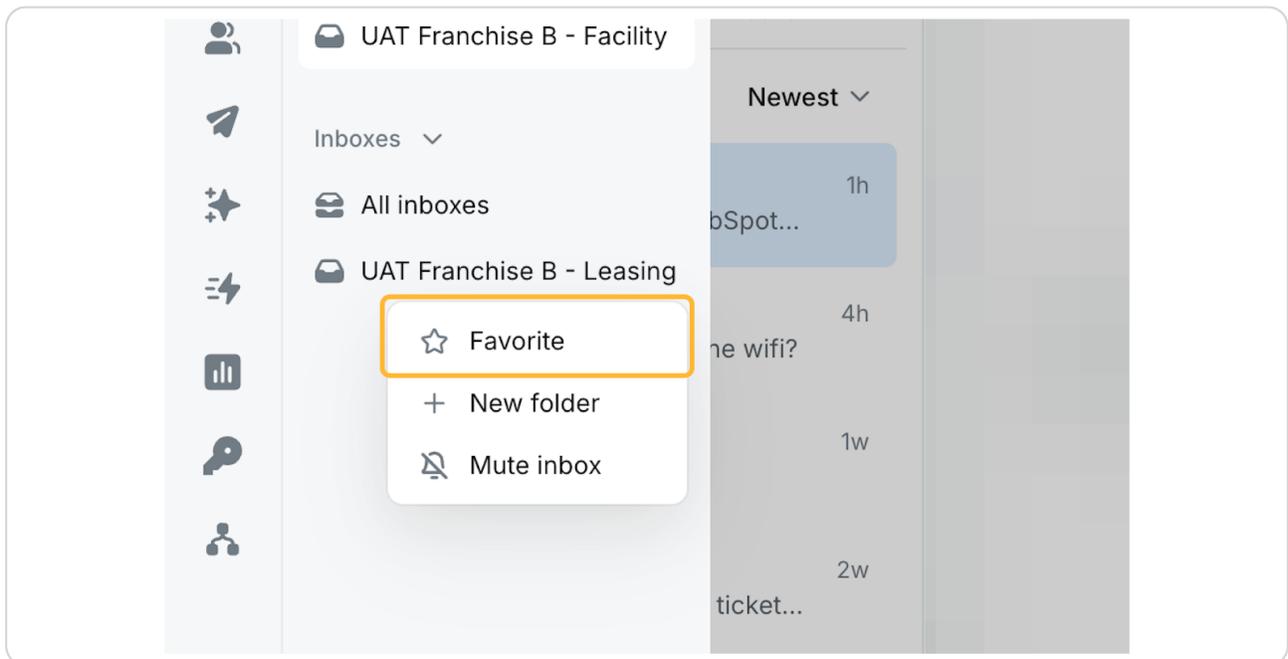
STEP 3

To favorite an Inbox, hover over the Inbox and Click the 3 dots



STEP 4

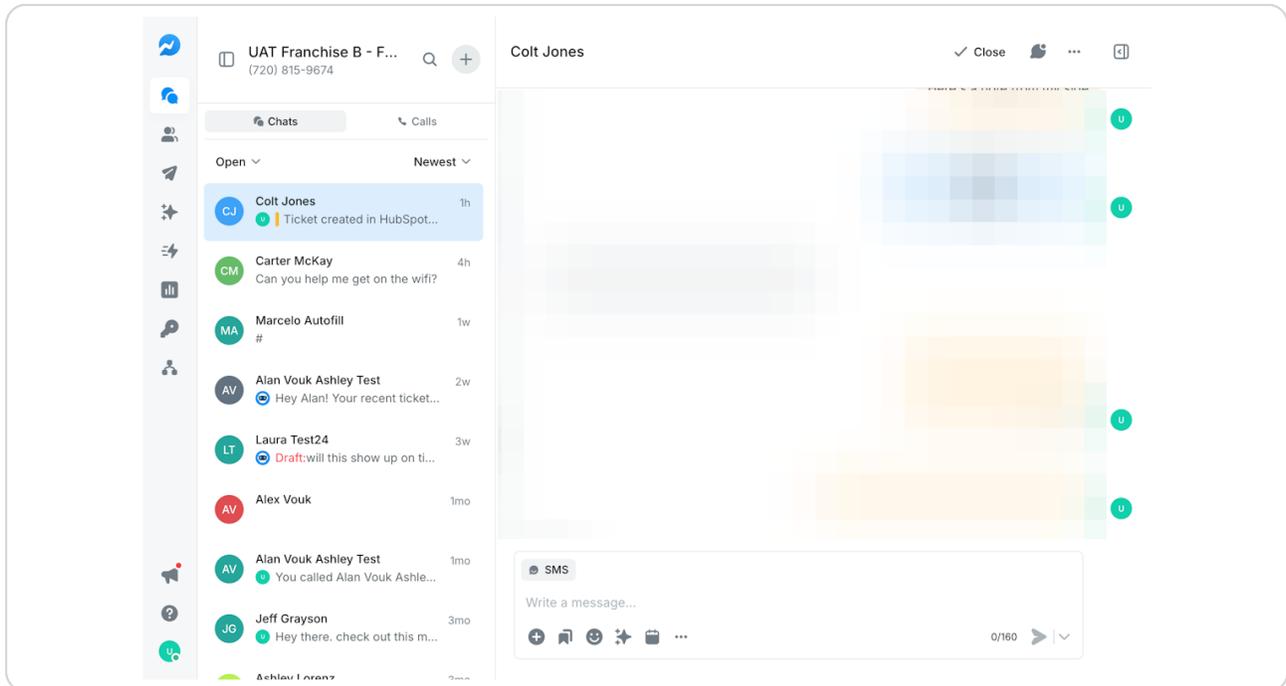
Click on Favorite



STEP 5

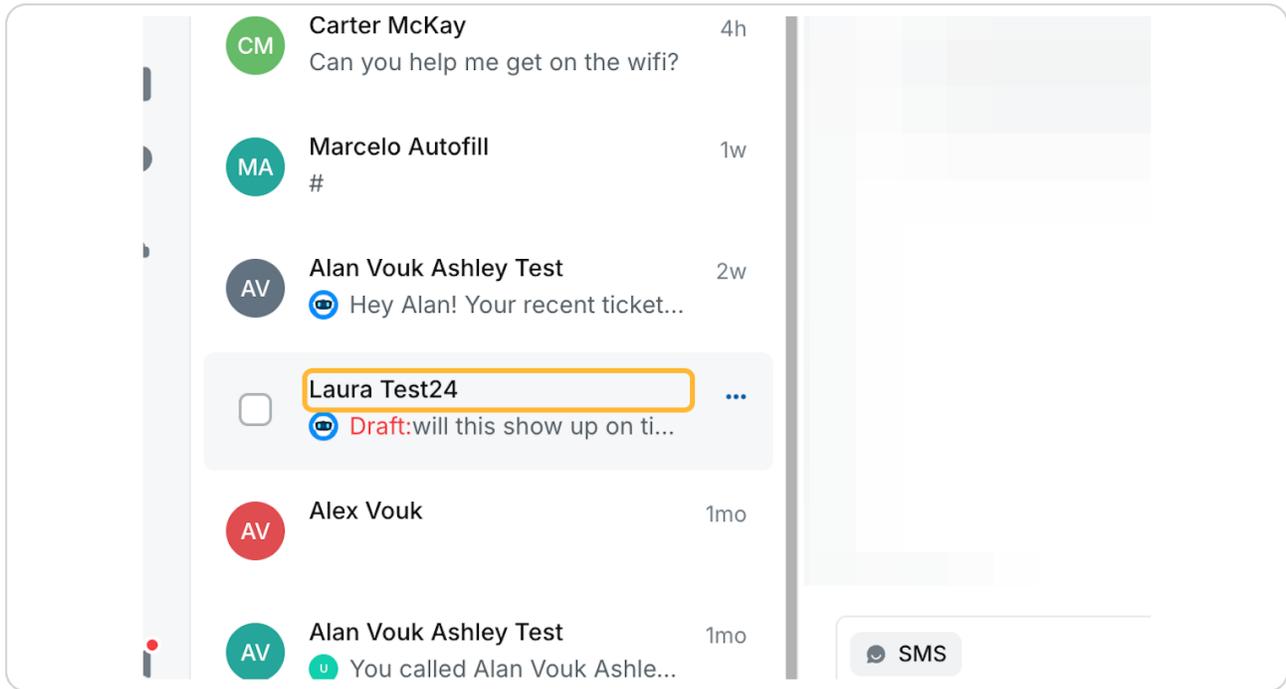
The Conversations section will look similar to other communications/platformed used in the past. These will look like iPhone conversations.

This is where you will be taken when you first log into SalesMsg.



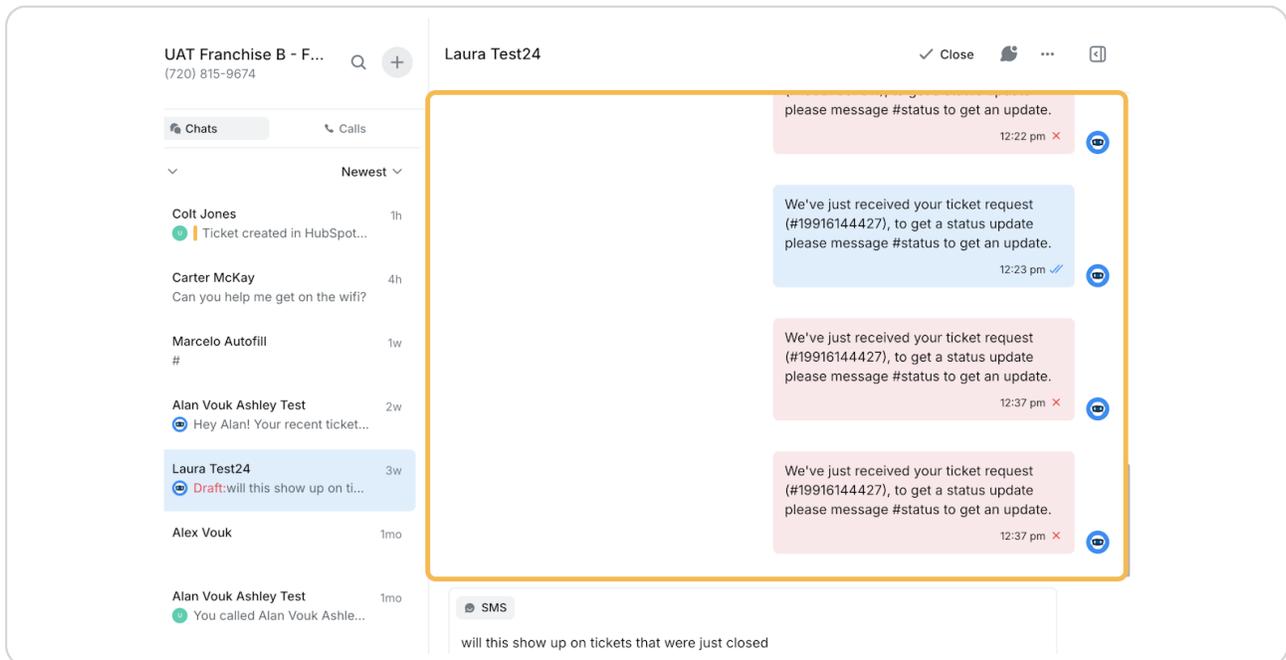
STEP 6

To compose a text message, you can either Click on a conversation to send a message



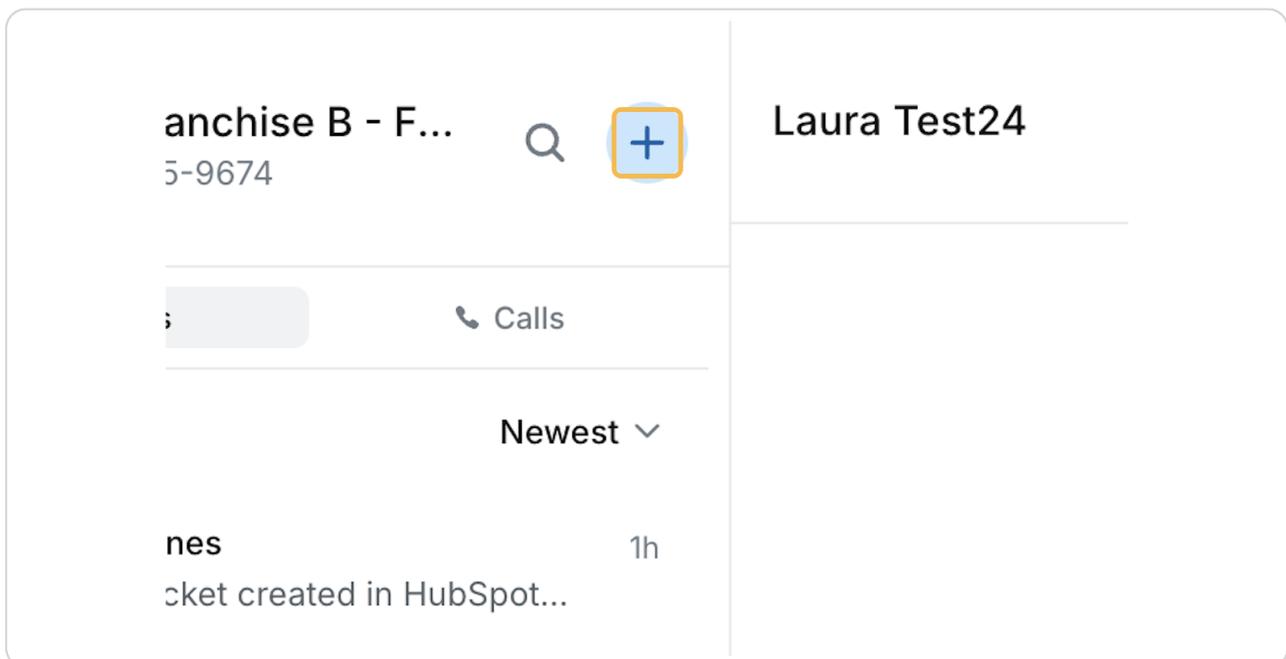
STEP 7

This will bring you into the conversation where you can send a message



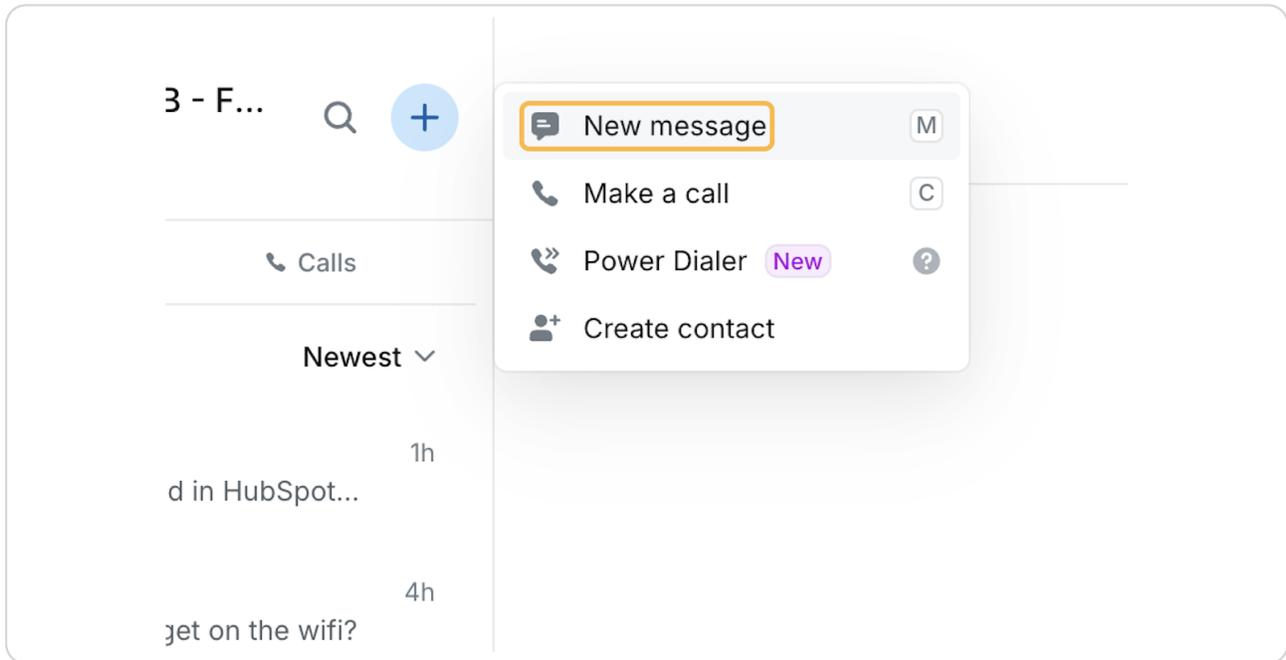
STEP 8

Or you can send a new conversation by Clicking the Plus button



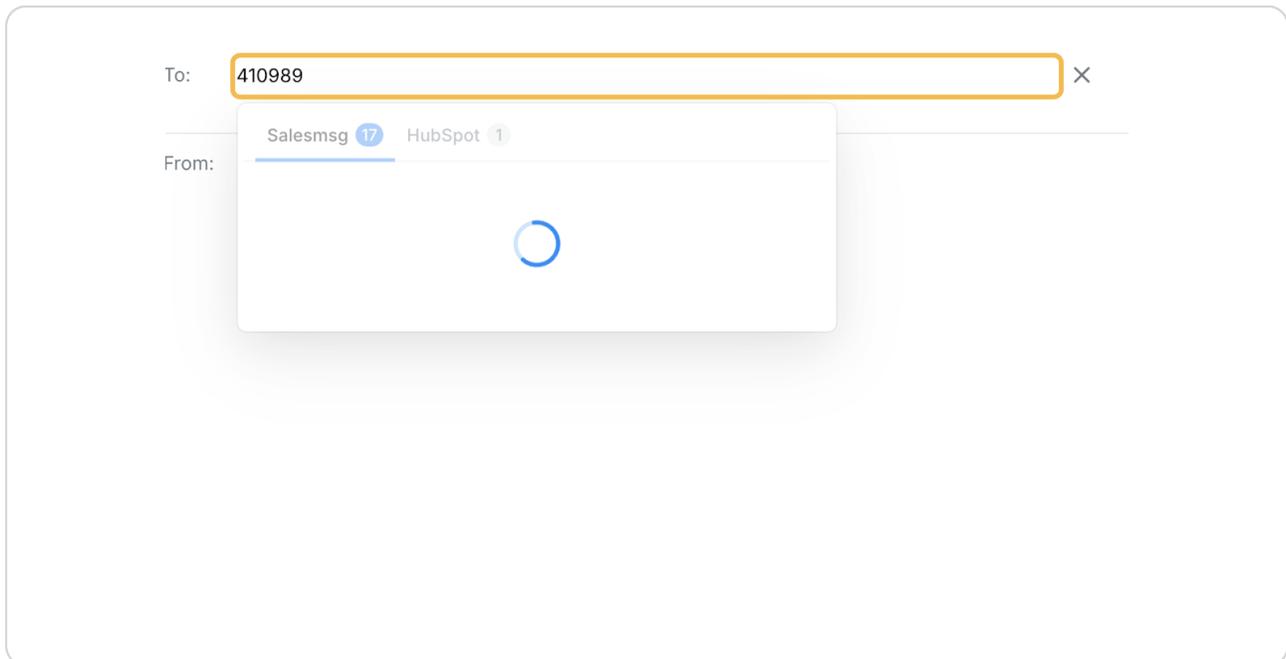
STEP 9

Click on New message



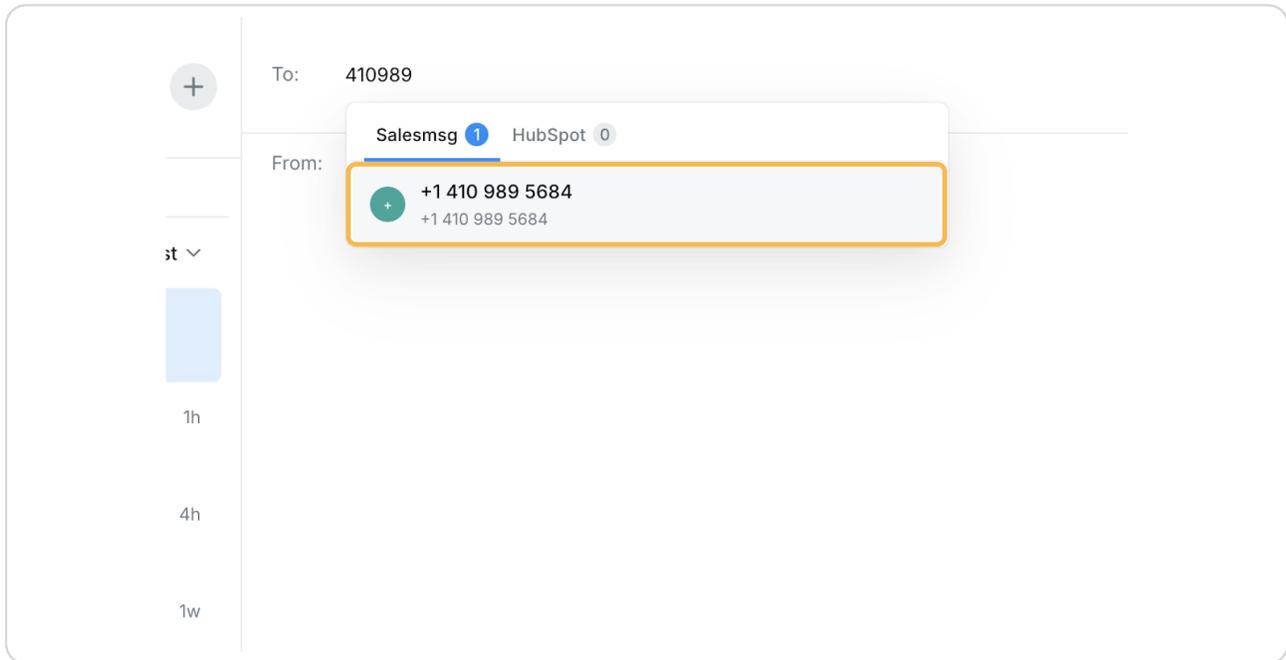
STEP 10

Find the Contact or insert the Phone number



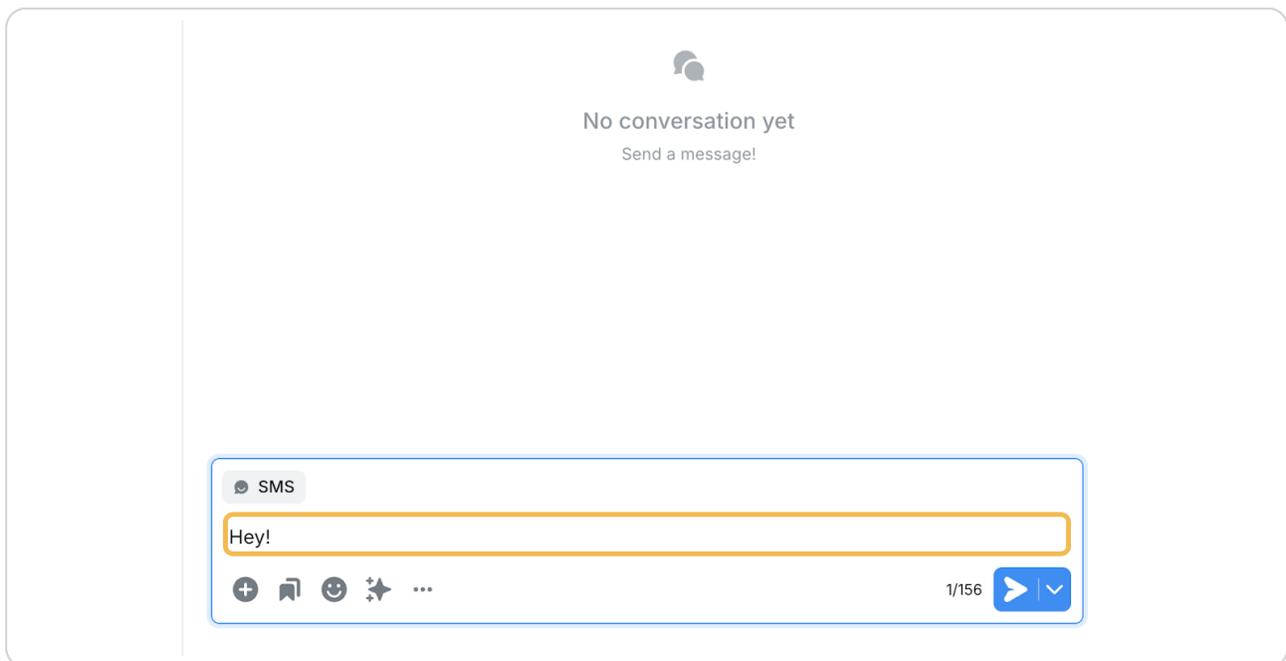
STEP 11

Add the Contact



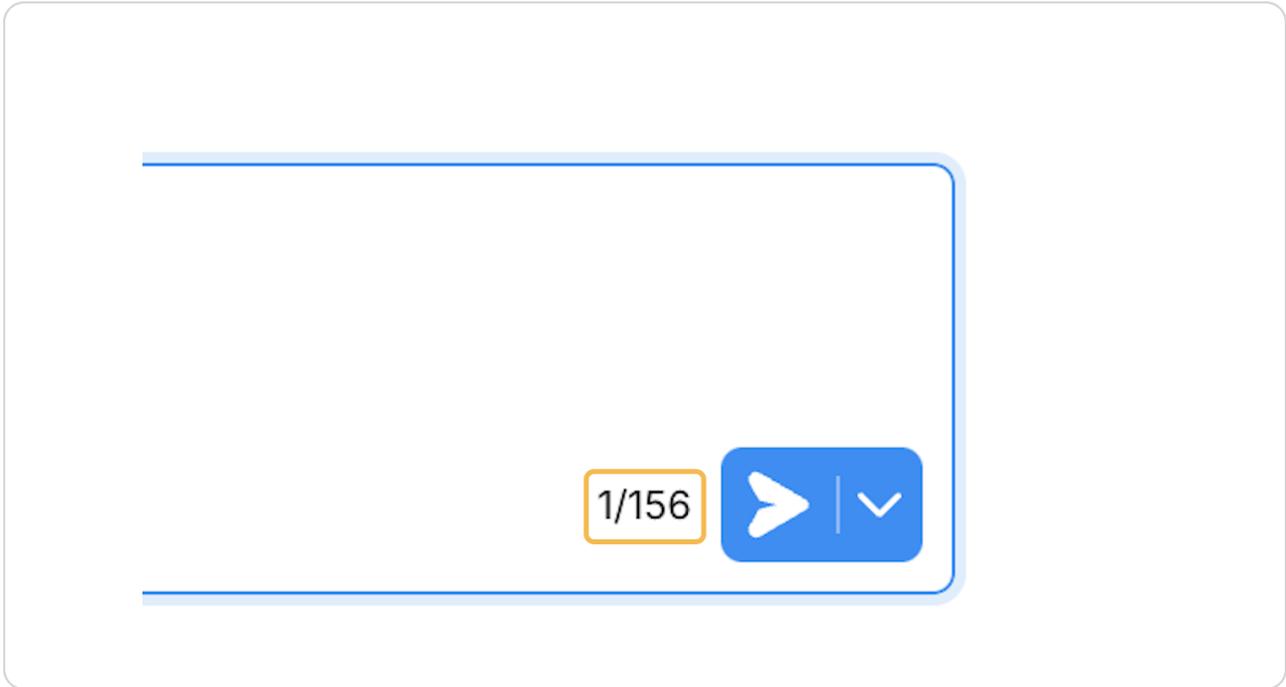
STEP 12

Start typing your message



STEP 13

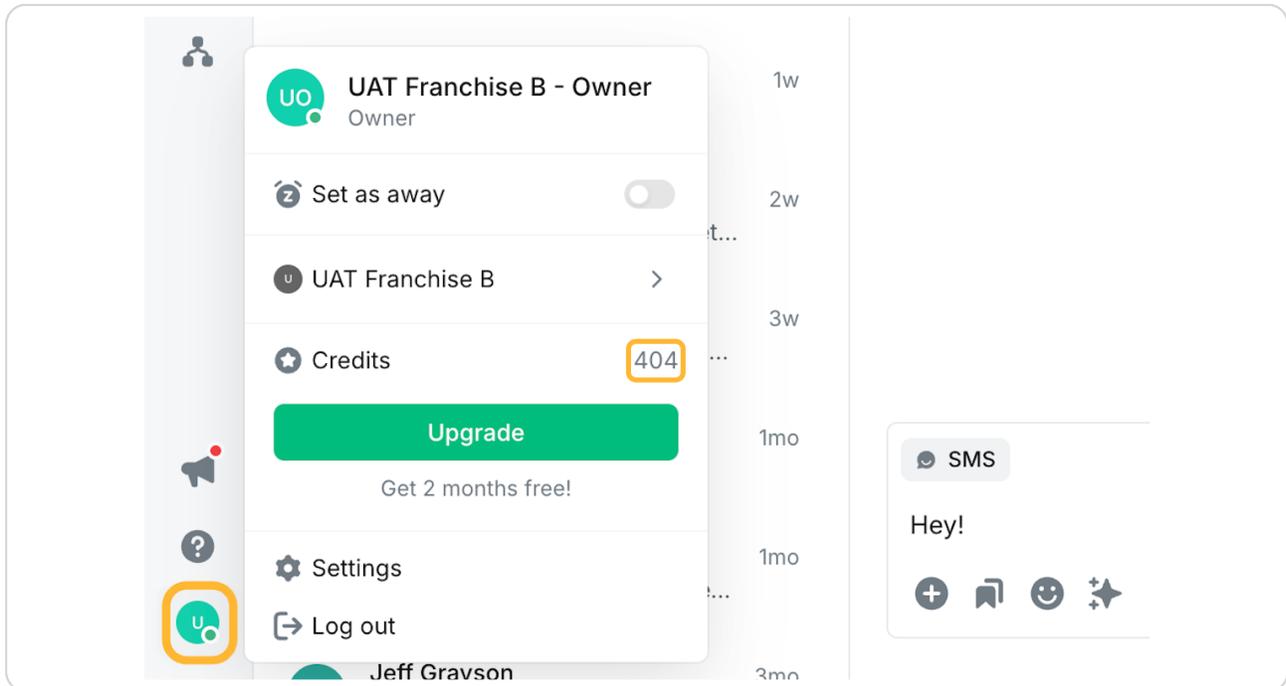
You'll want to pay attention to a few things when texting. The first is the character count down at the bottom of the message you're typing.



STEP 14

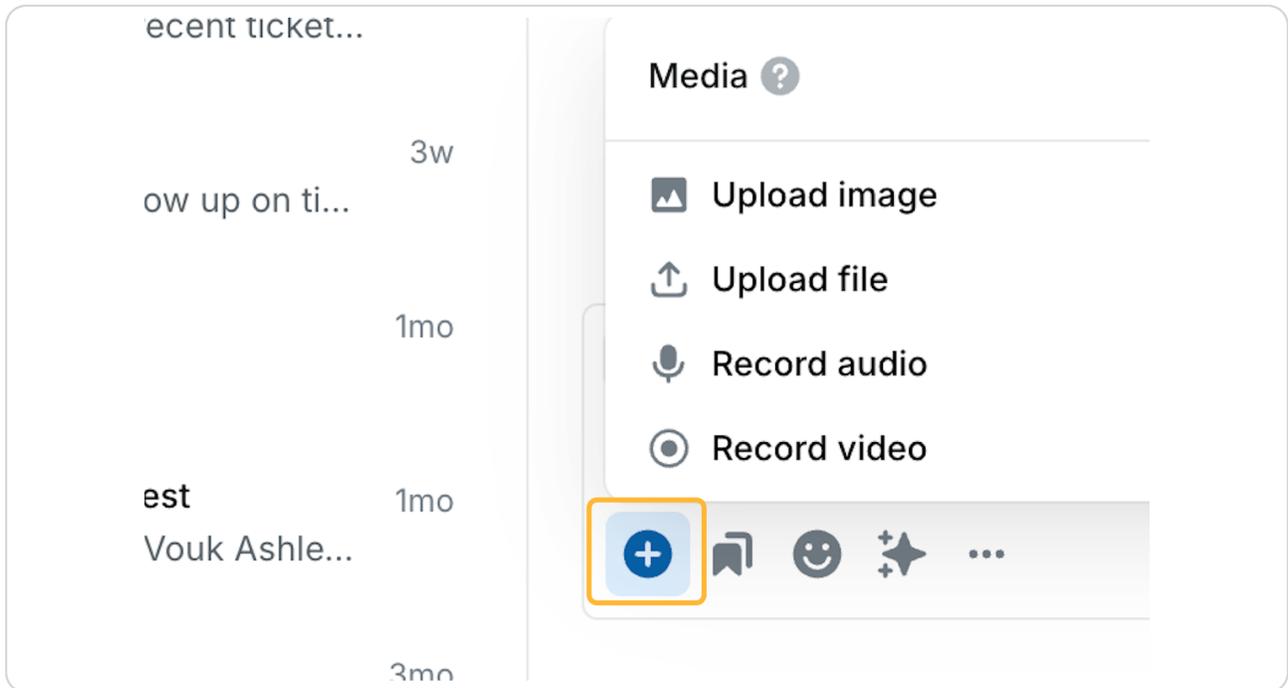
Every text message costs one credit. You can see how many credits you have by clicking the profile button

Note: You can go over 156 characters. It will cost more than one credit.



STEP 15

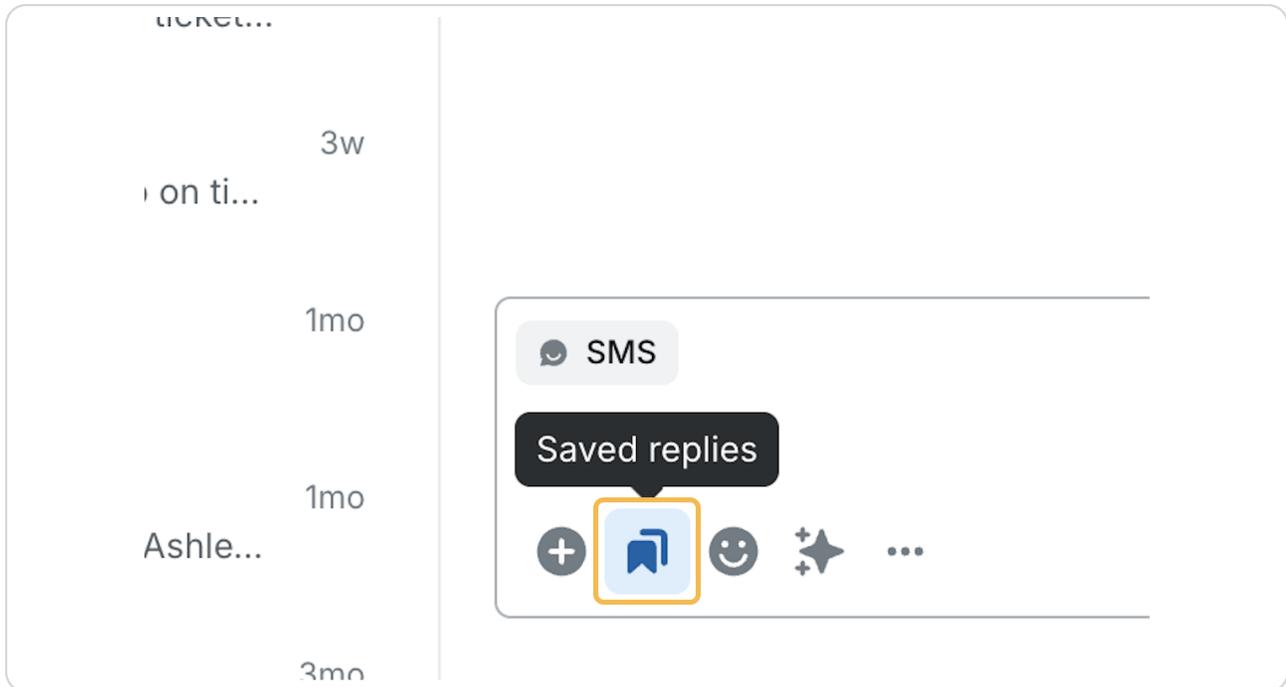
You have the ability to Add media by clicking the Plus button in the text box



STEP 16

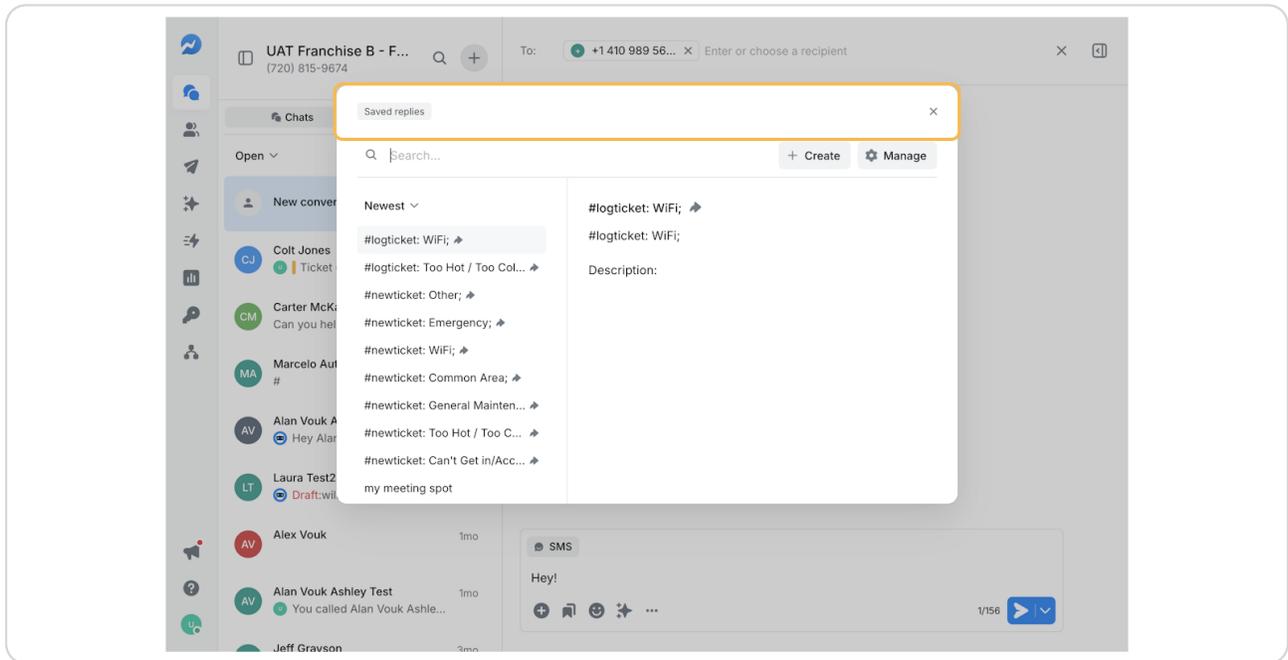
Access Saved replies

This feature allows you to build out canned replies if you're finding yourself typing in something over and over. This is a great way to save some time.



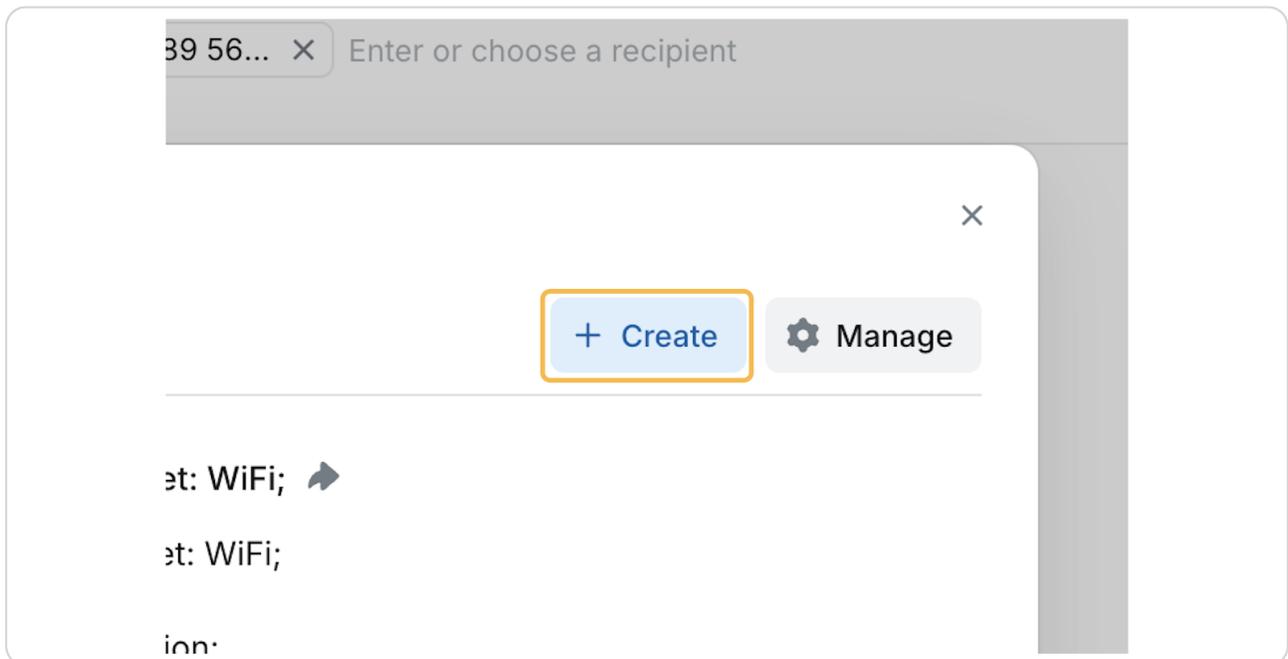
STEP 17

Choose from a Saved reply



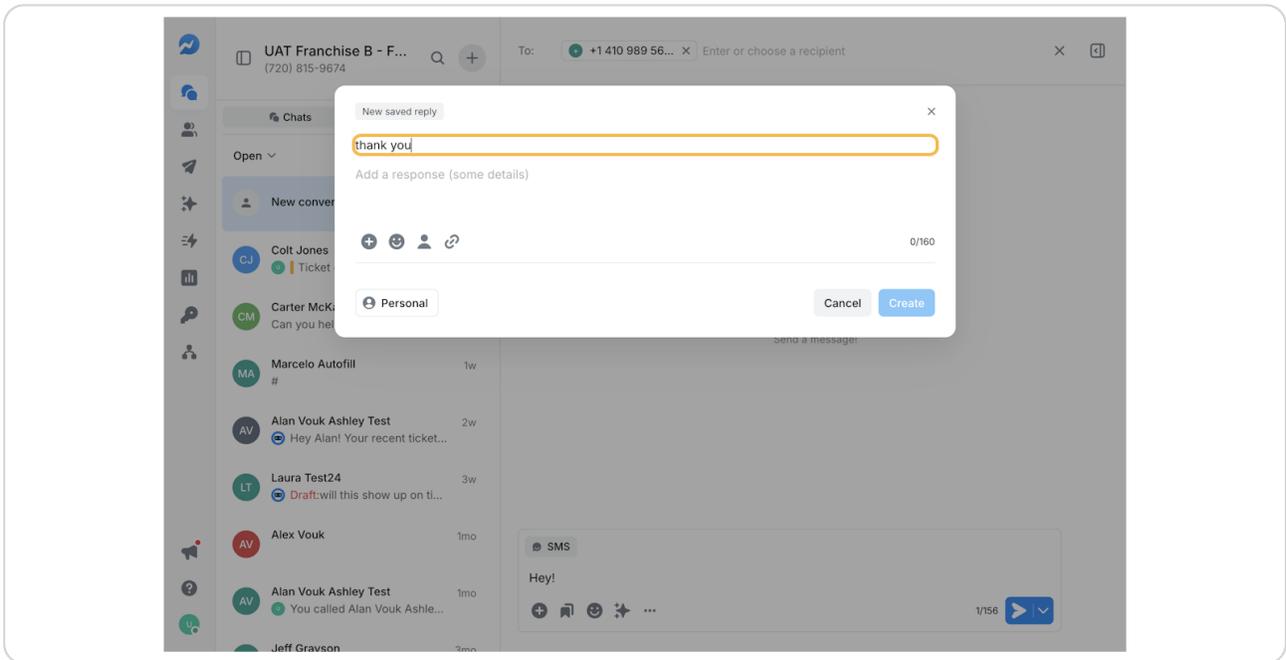
STEP 18

Or create a new one by Clicking on Create



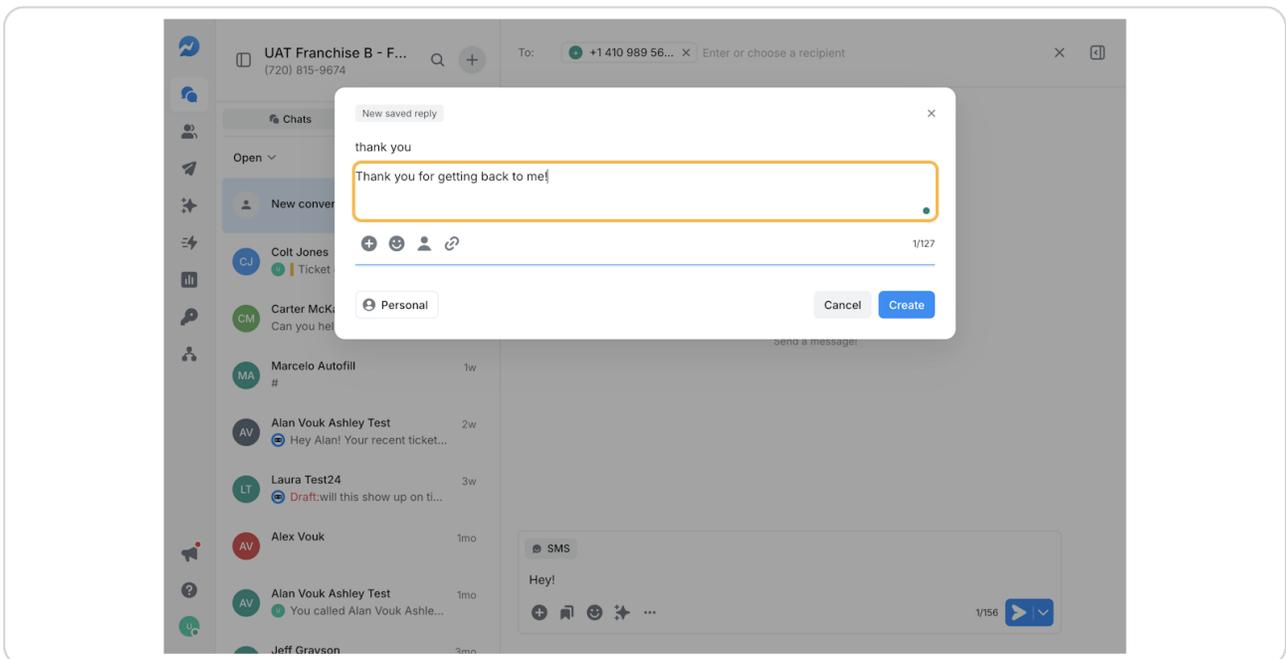
STEP 19

Add a Title



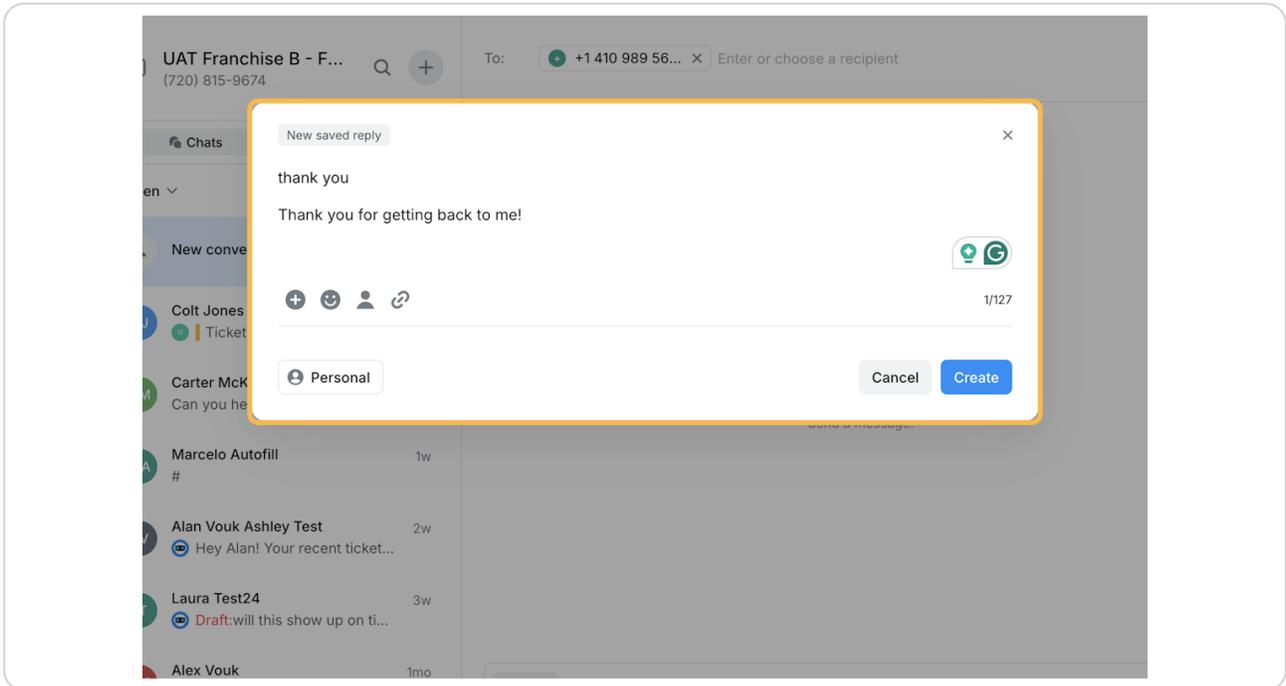
STEP 20

Add a response message



STEP 21

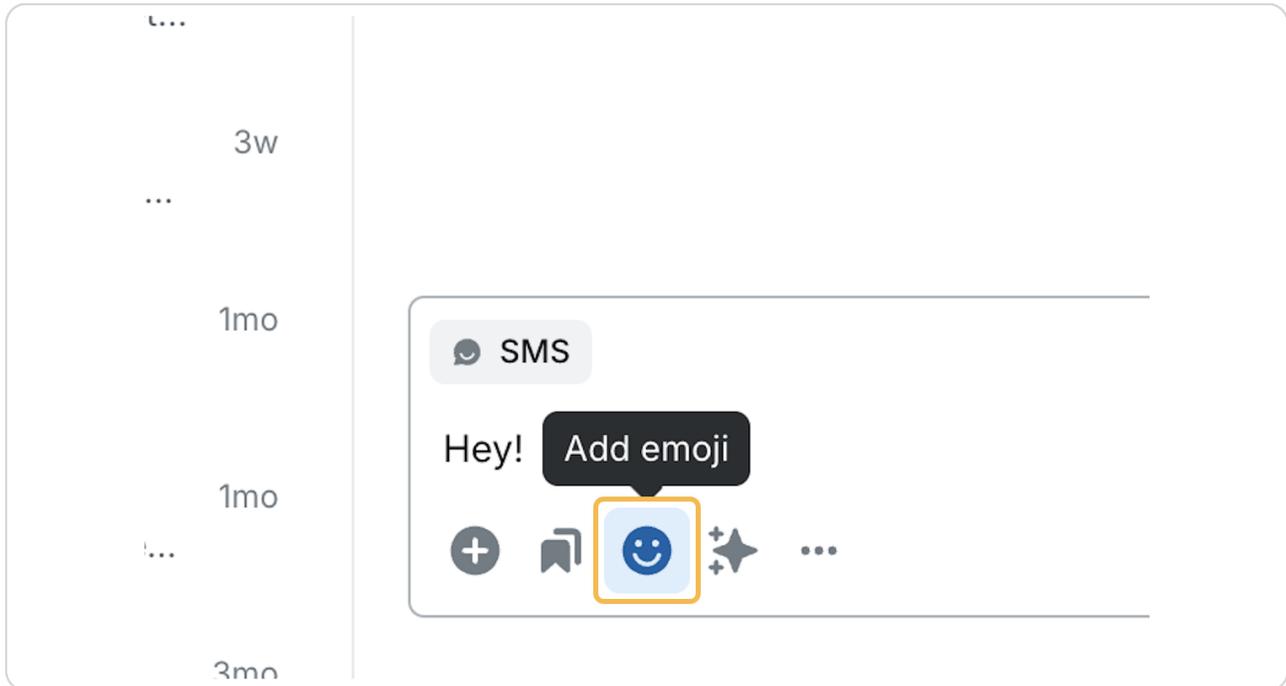
Click on Create



STEP 22

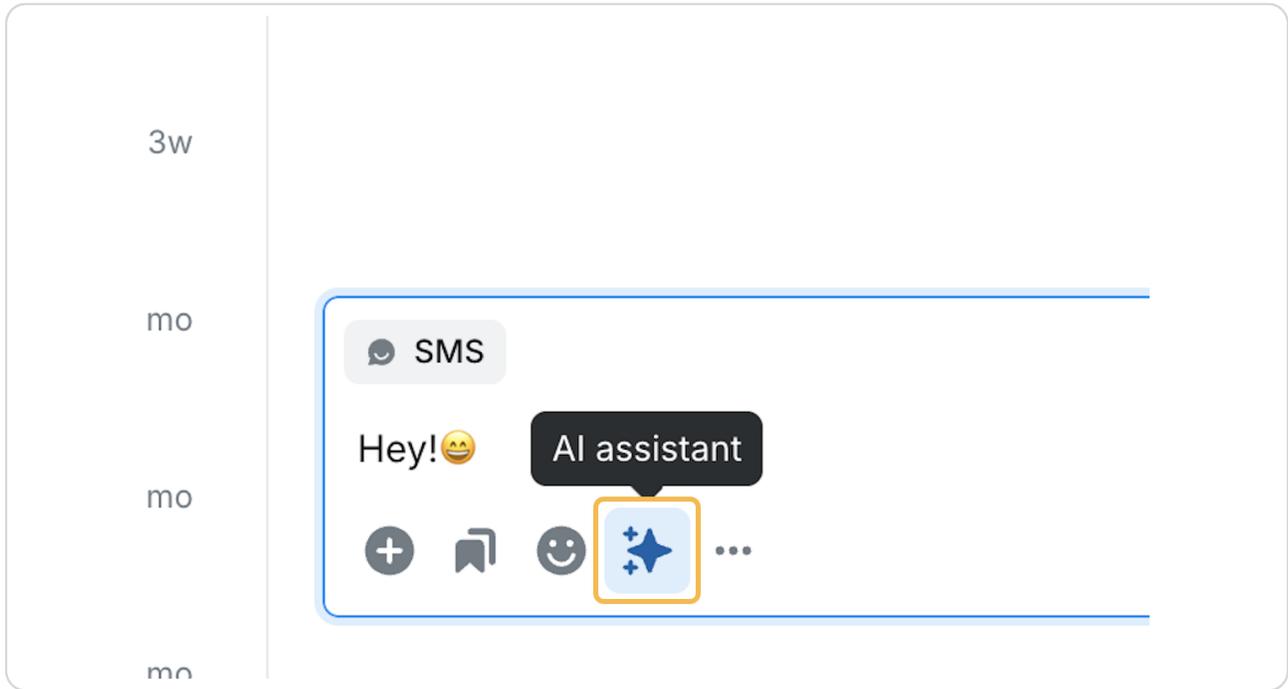
You can add an emoji

Note: These eat up a lot of characters. We recommend is one emoji is plenty.



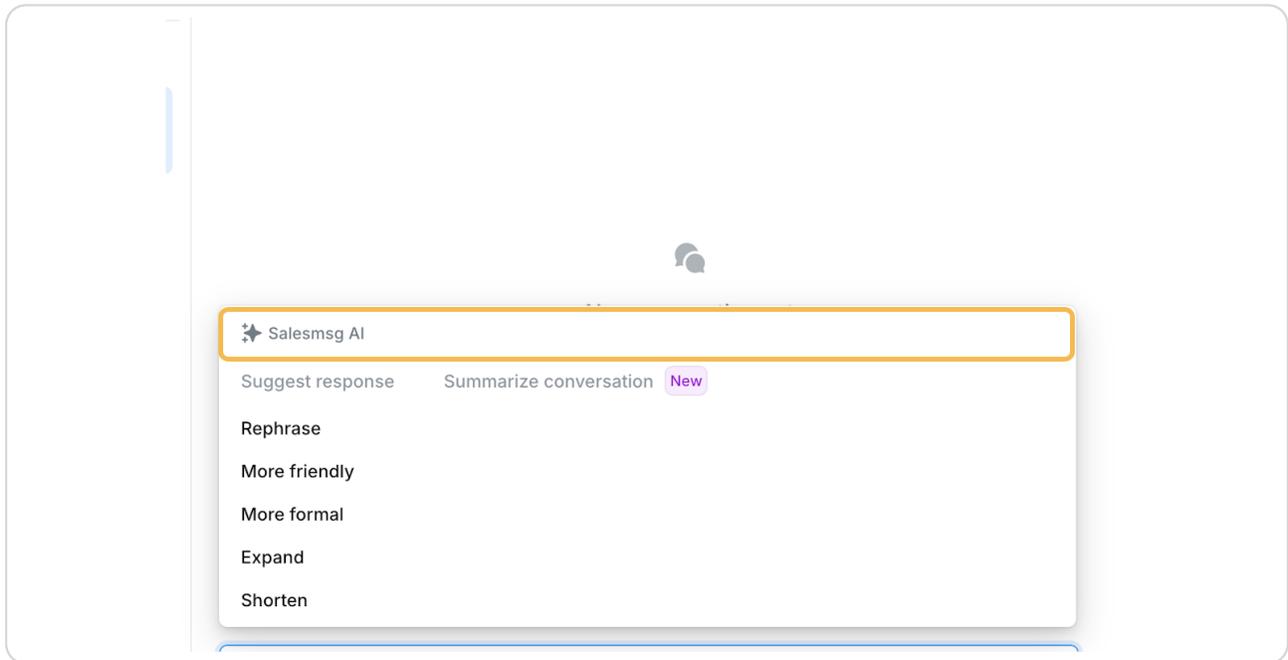
STEP 23

There is an AI assistant



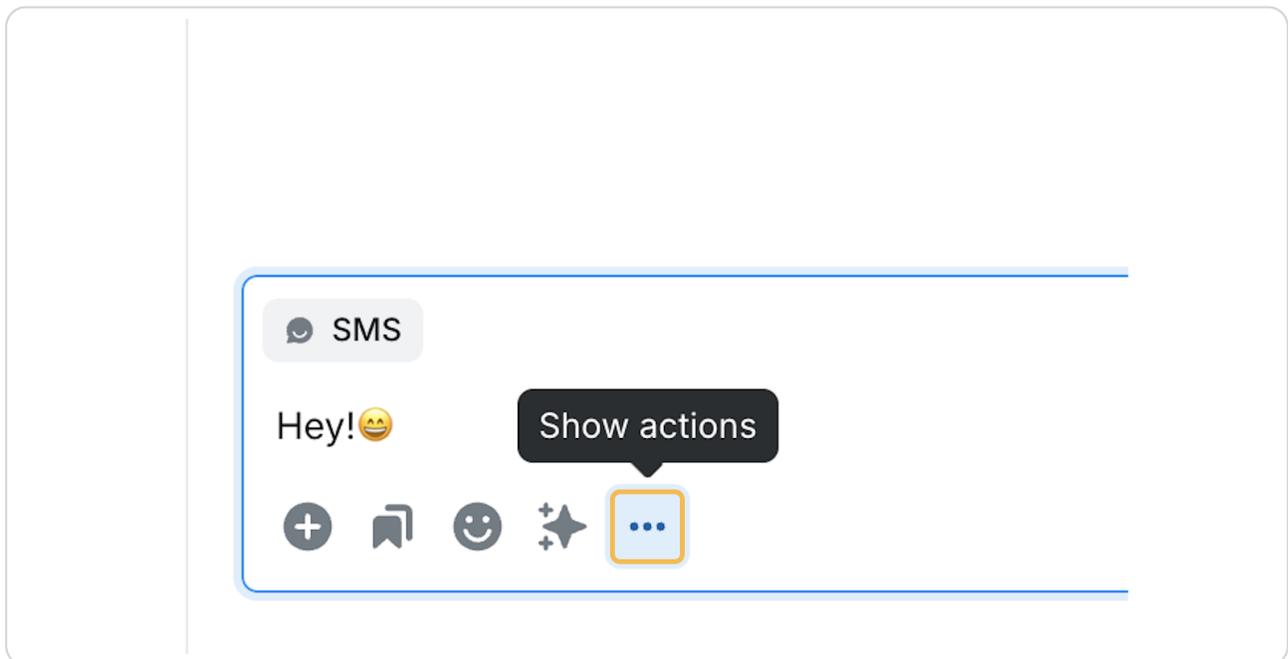
STEP 24

This will allow you to rephrase or make your message more friendly



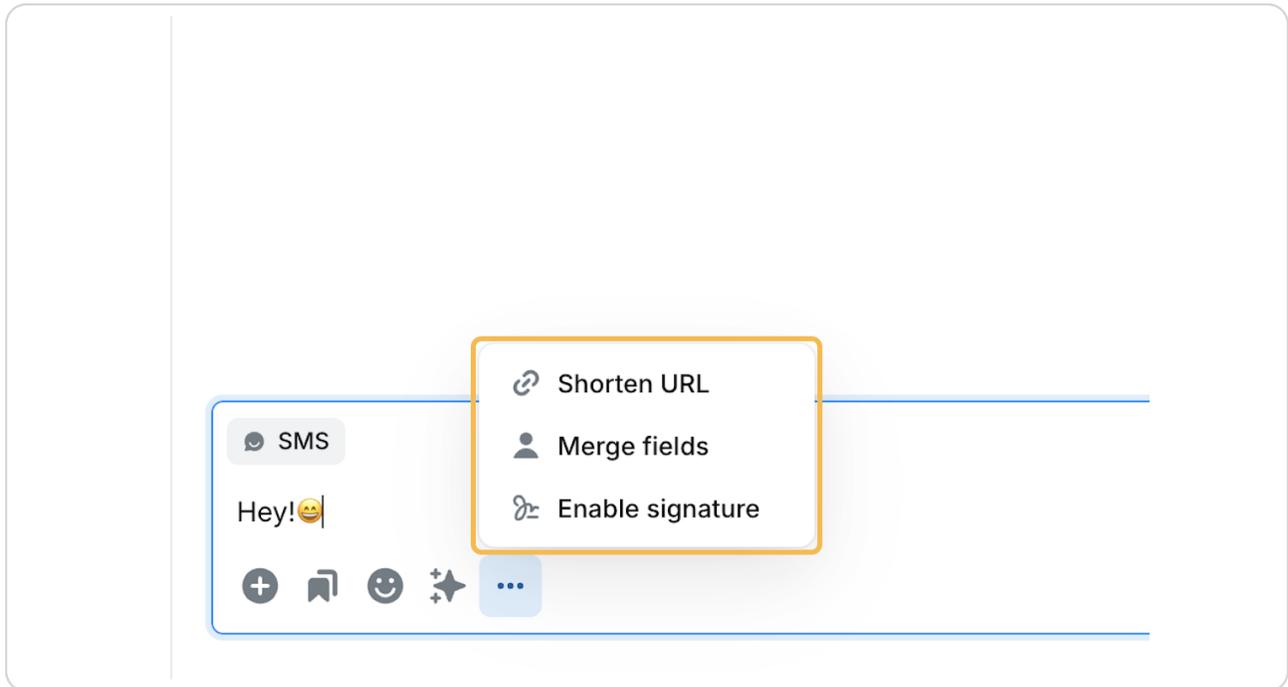
STEP 25

For more actions, Click on the 3 dots



STEP 26

You can Shorten a URL if you are sharing a link, add in Merge fields from HubSpot and enable a signature

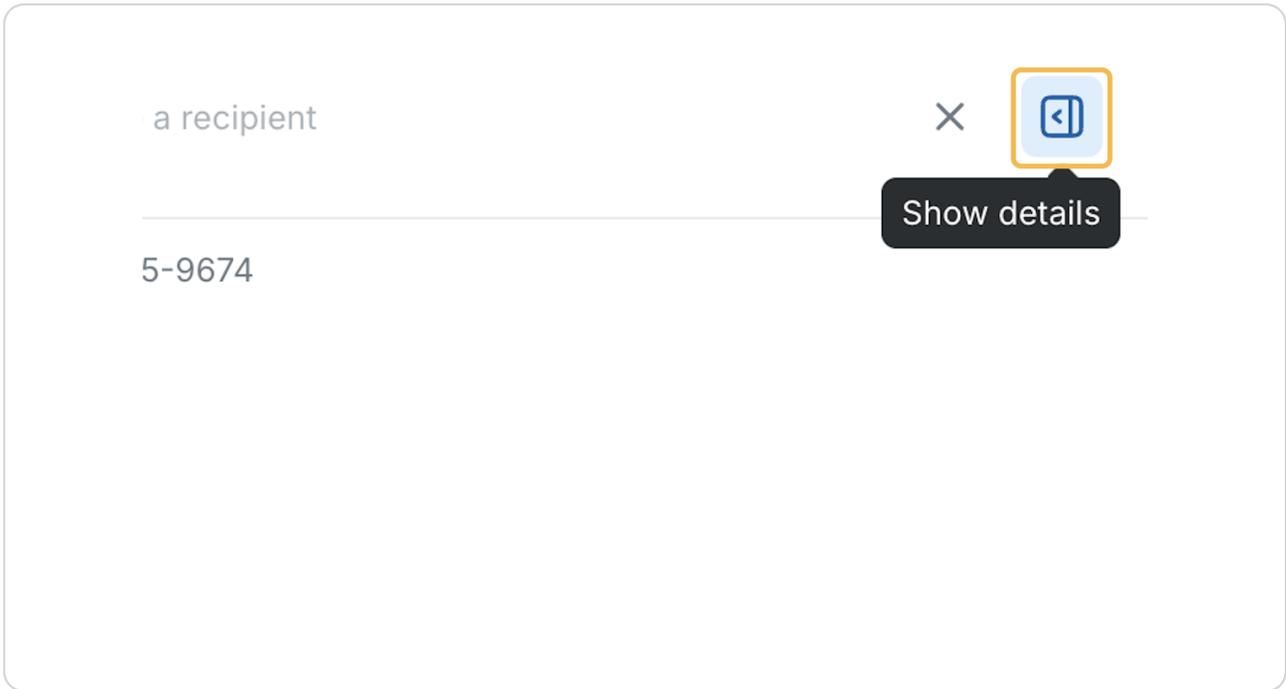


Accessing the Contact Card

8 Steps

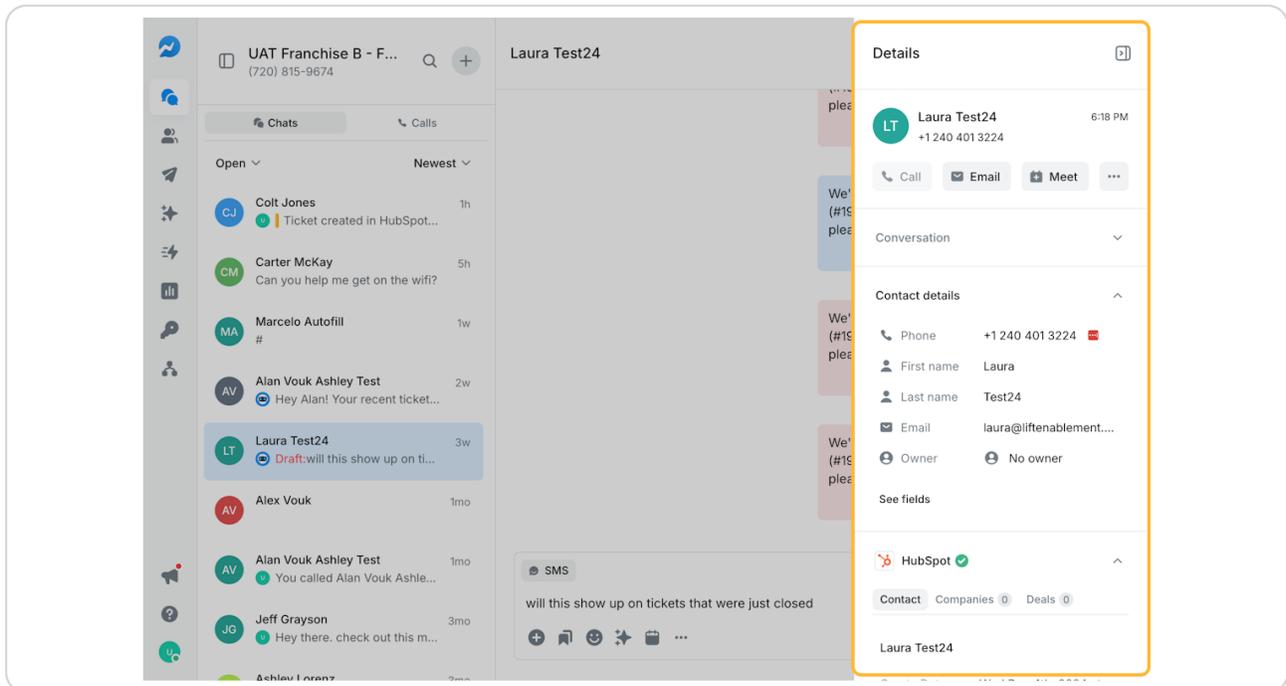
STEP 27

Click on Show Details button in the top right corner (unless the Contact Card is already visible)



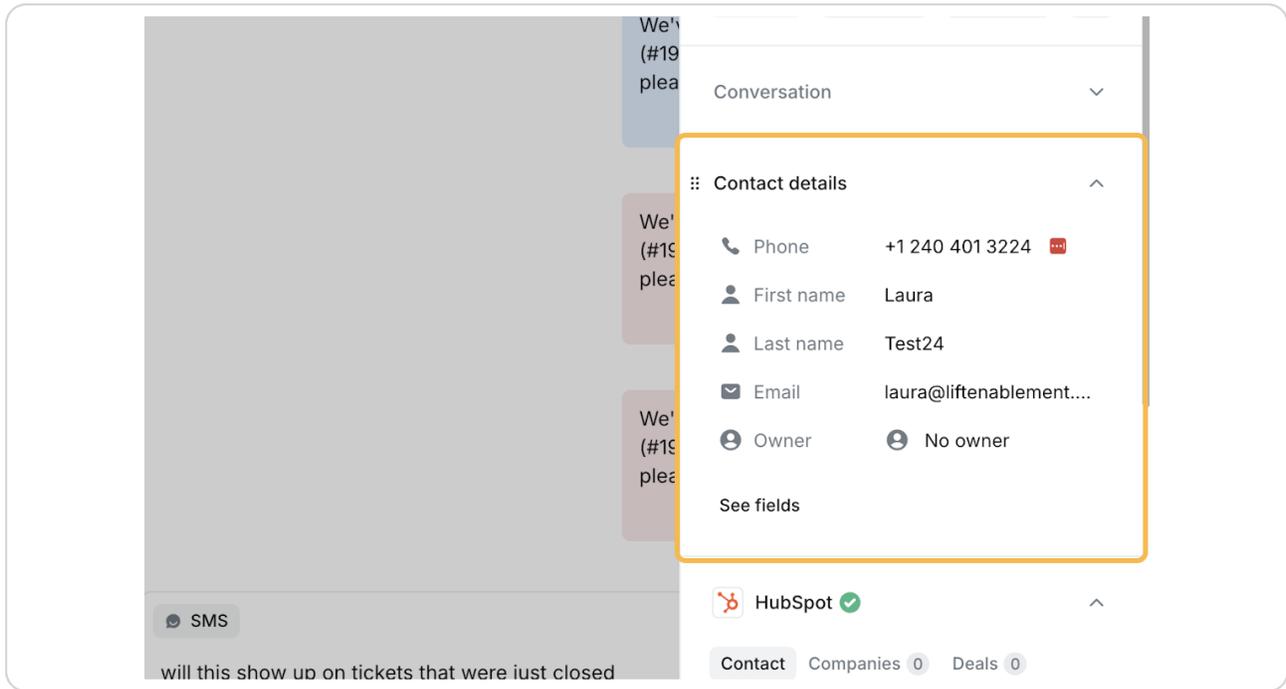
STEP 28

The Contact Card will open



STEP 29

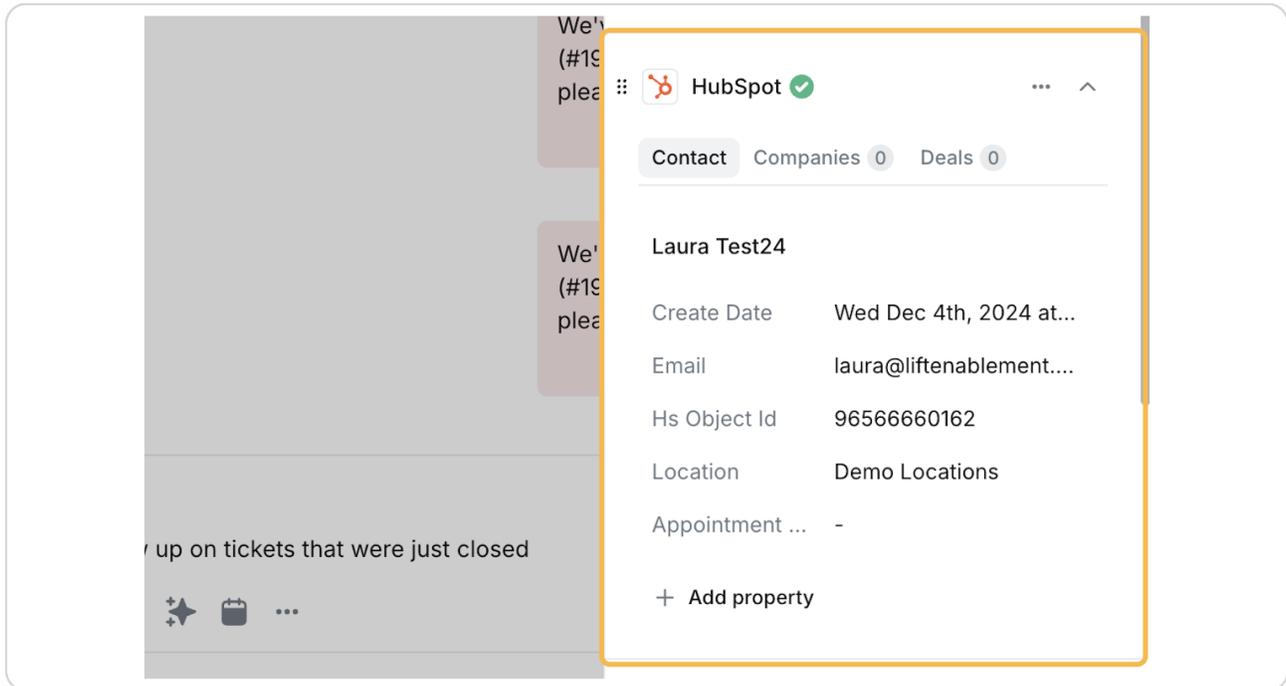
You'll be able to see the Contact details if they are an existing Contact in HubSpot



STEP 30

You'll be able to see synced data from HubSpot on the Contact

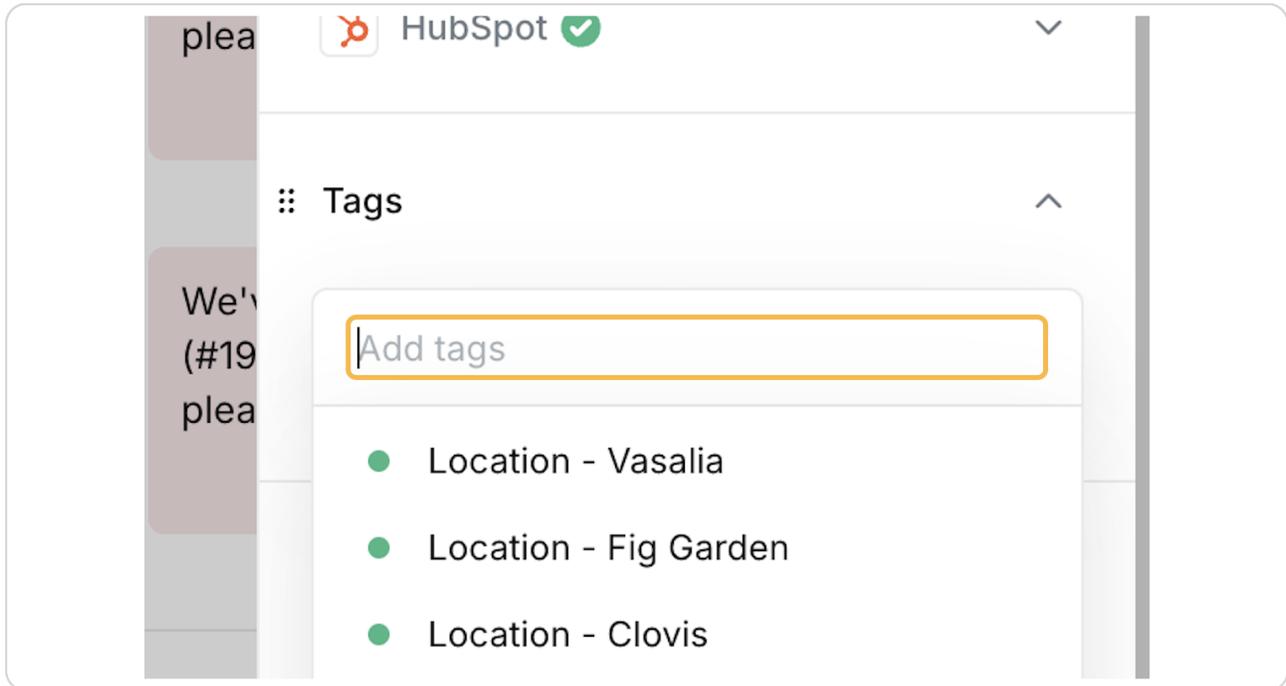
This includes top level information on the Contact, Companies, and Deals



STEP 31

You have the ability to add Tags

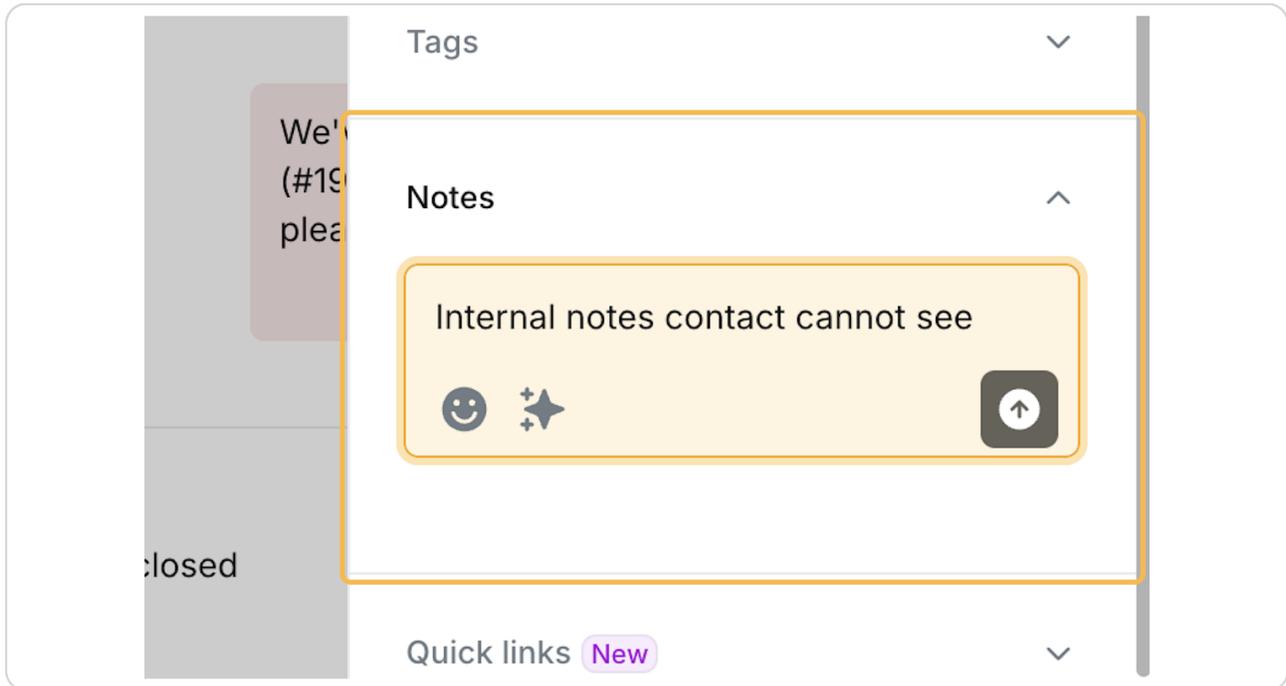
This is a great way to continue to organize your contacts.



STEP 32

You have the ability to write Internal Notes

These are notes you can add to the Contact Card that the contact cannot see.



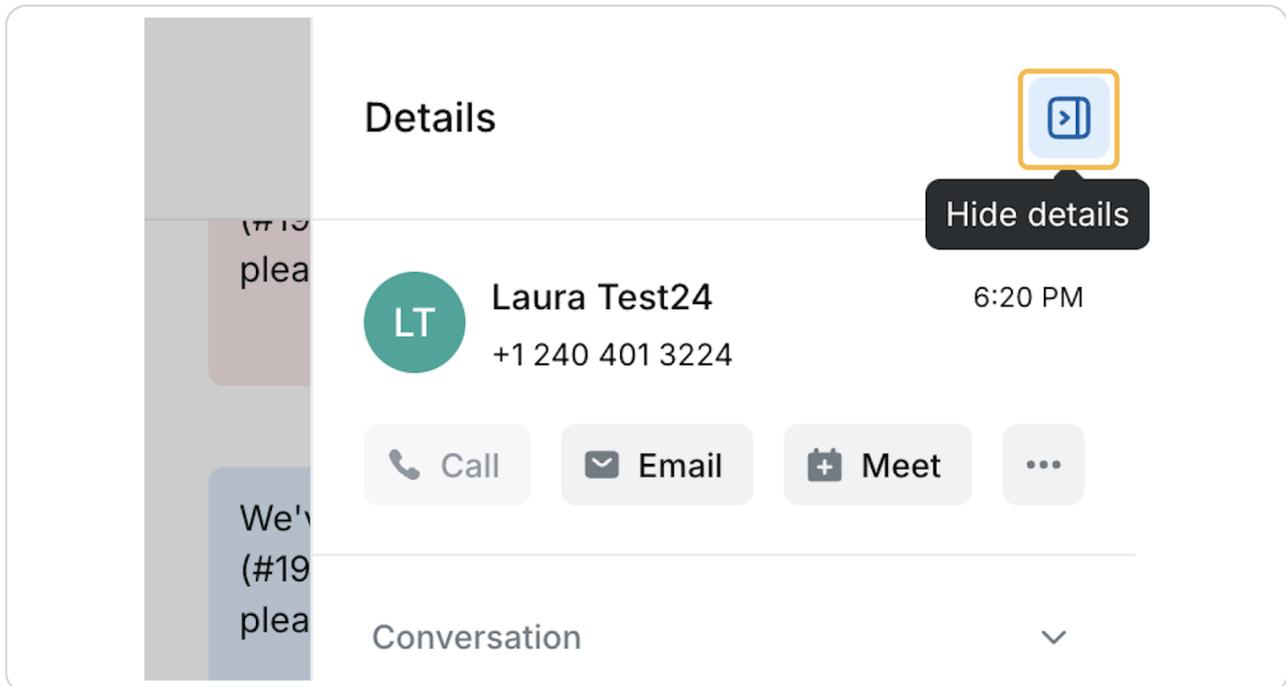
STEP 33

If the Contact is a Lead in HubSpot tied to a Deal, you can jump into HubSpot to view the record

The screenshot shows a user interface for a HubSpot contact record. At the top, there is a HubSpot logo with a green checkmark and an upward arrow. Below this, there are tabs for 'Contact', 'Companies 0', and 'Deals 0'. The main content area displays the contact name 'Laura Test24' with a blue share icon (highlighted by a yellow box) and a copy icon. A dark tooltip with the text 'Open in HubSpot' is positioned over the share icon. Below the name, there are three rows of metadata: 'Create Date' (Wed Dec 4th, 2024 at...), 'Email' (laura@liftonablement...), and 'Hs Object Id' (96566660162). On the left side, there is a vertical sidebar with partially visible text: 'We\' (#19 plea' and 'We\' (#19 plea'.

STEP 34

Click on IconButtonActionButton_Default



Calling in SalesMsg

7 Steps



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

STEP 35

Click Call

The screenshot displays a CRM interface with a top notification bar that reads "You have assumed another user's account" and a "Stop assuming" button. The interface is divided into three main sections: a left sidebar, a central conversation area, and a right details panel.

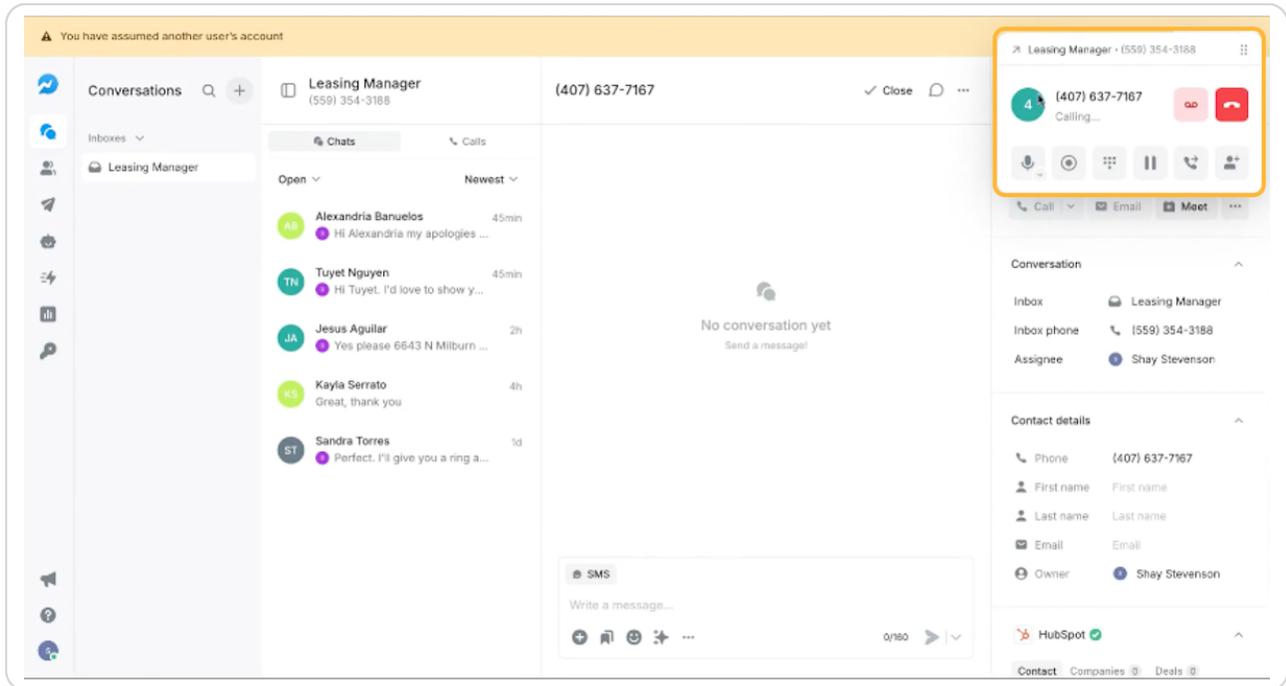
- Left Sidebar:** Contains navigation icons for Conversations, Inboxes, and Leasing Manager.
- Central Conversation Area:** Shows a list of recent conversations under the heading "Leasing Manager (559) 354-3188". The list includes:
 - Alexandria Banuelos (45min): Hi Alexandria my apologies ...
 - Tuyet Nguyen (45min): Hi Tuyet. I'd love to show y...
 - Jesus Aguilar (2h): Yes please 6643 N Milburn ...
 - Kayla Serrato (4h): Great, thank you
 - Sandra Torres (1d): Perfect. I'll give you a ring a...
- Right Details Panel:** Shows details for a contact with phone number (407) 637-7167. It includes fields for Phone, First name, Last name, Email, and Owner (No owner). It also shows a HubSpot logo and a "View contact" link.

The main conversation area is currently empty, displaying "No conversation yet" and "Send a message!". A text input field at the bottom contains the message "Hey!". A "Call" button is highlighted with an orange box in the top right corner of the conversation area.

STEP 36

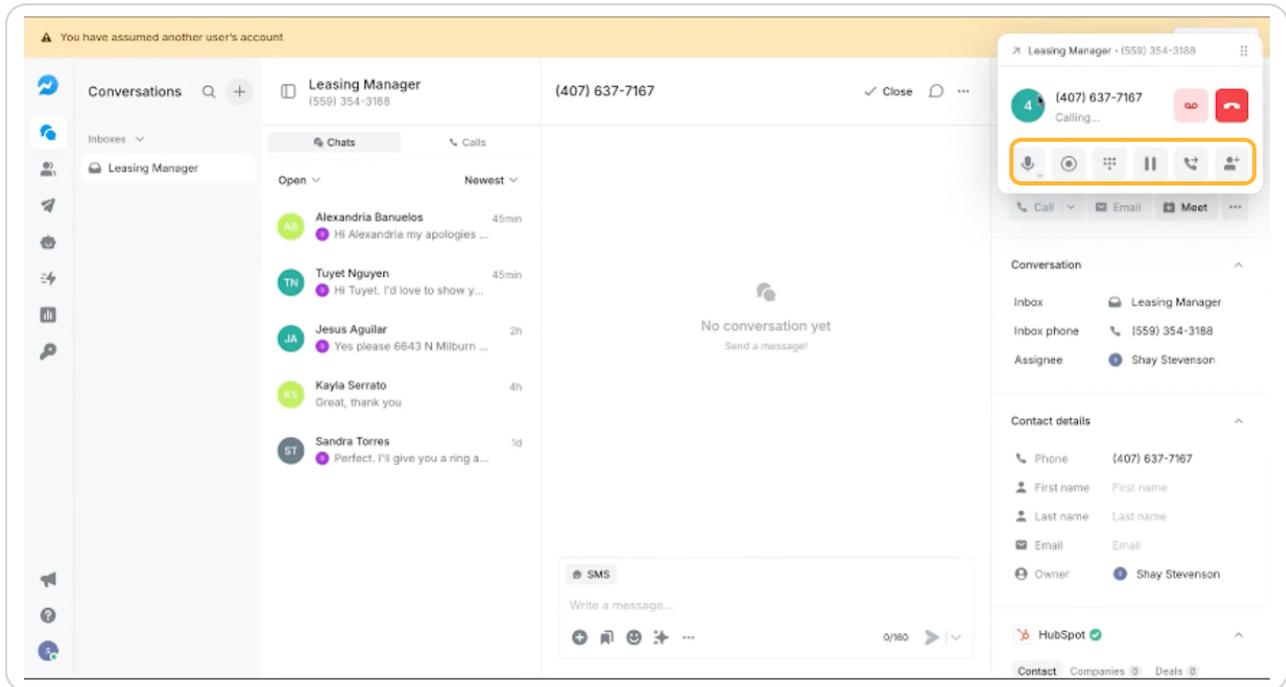
A call box will appear and will start to dial the number

You will be able to hear the call ringing.



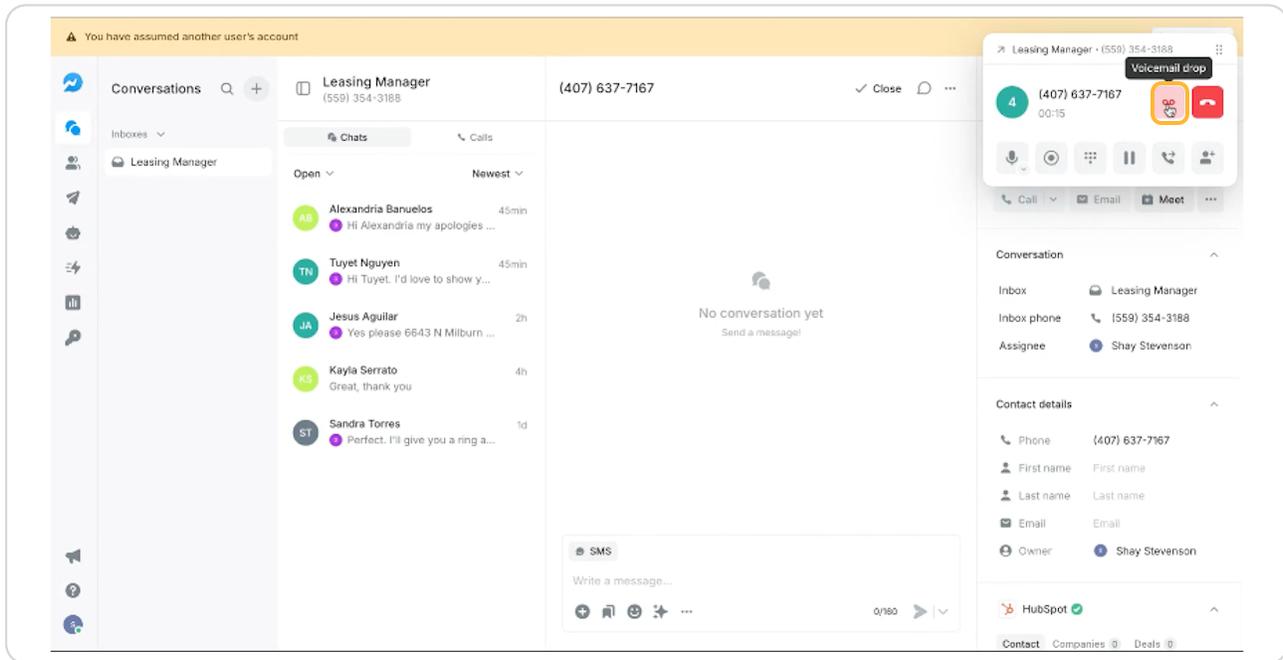
STEP 37

You have the ability to Mute, Record the call, Show a dialpad, Put the call on hold, Transfer the call, and Add others to the call



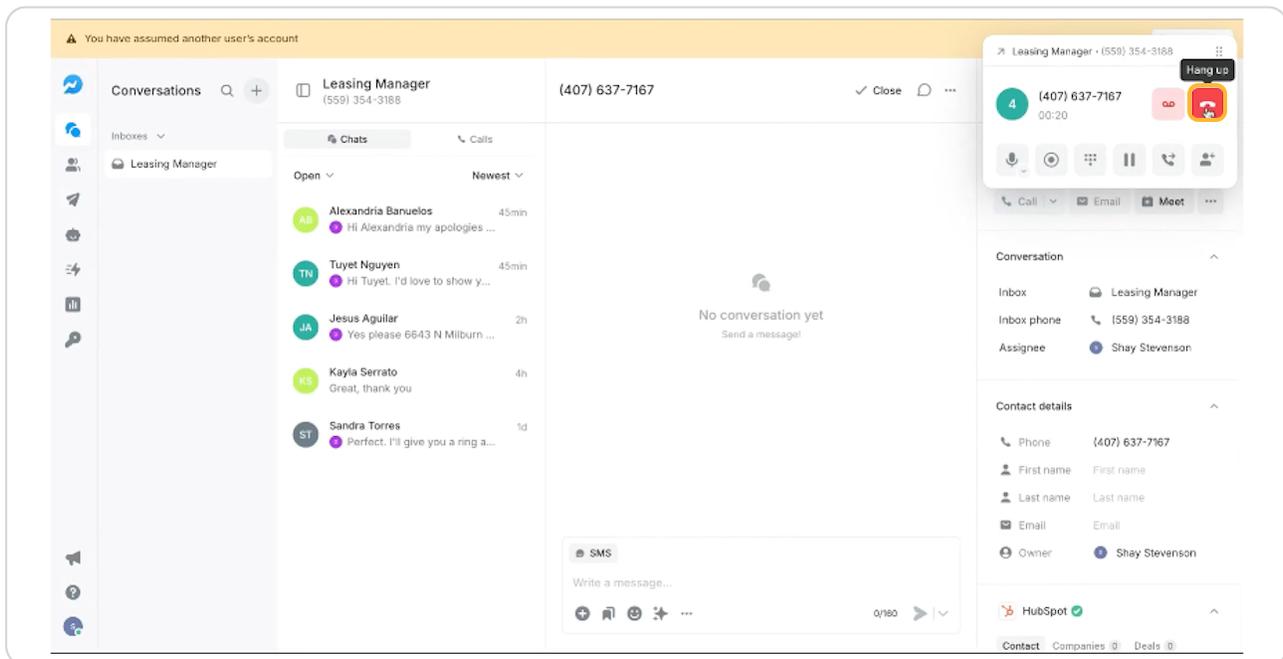
STEP 38

There is also the ability to drop a Voicemail



STEP 39

Click Hang up



STEP 40

If you are not getting the audio cues and cannot hear the call, Click the dropdown next to Call

The screenshot displays a CRM interface with a top navigation bar. A notification at the top left reads "You have assumed another user's account" with a "Stop assuming" button. The main interface is divided into three sections: a sidebar on the left, a central chat area, and a details panel on the right.

Sidebar: Contains navigation icons for home, conversations, inboxes, and a search bar. The "Inboxes" dropdown is open, showing "Leasing Manager".

Central Chat Area: Shows a list of messages from "Leasing Manager" (559) 354-3188. The messages are sorted by "Newest" and include:

- Alexandria Banuelos (45min): Hi Alexandria my apologies ...
- Tuyet Nguyen (45min): Hi Tuyet. I'd love to show y...
- Jesus Aguilar (2h): Yes please 6643 N Milburn ...
- Kayla Serrato (4h): Great, thank you
- Sandra Torres (1d): Perfect. I'll give you a ring a...

Details Panel: Shows contact information for "(407) 637-7167". The "Call" button is highlighted with a red box and has a dropdown arrow next to it. Other buttons include "Email" and "Meet".

Contact Details: Lists the following information:

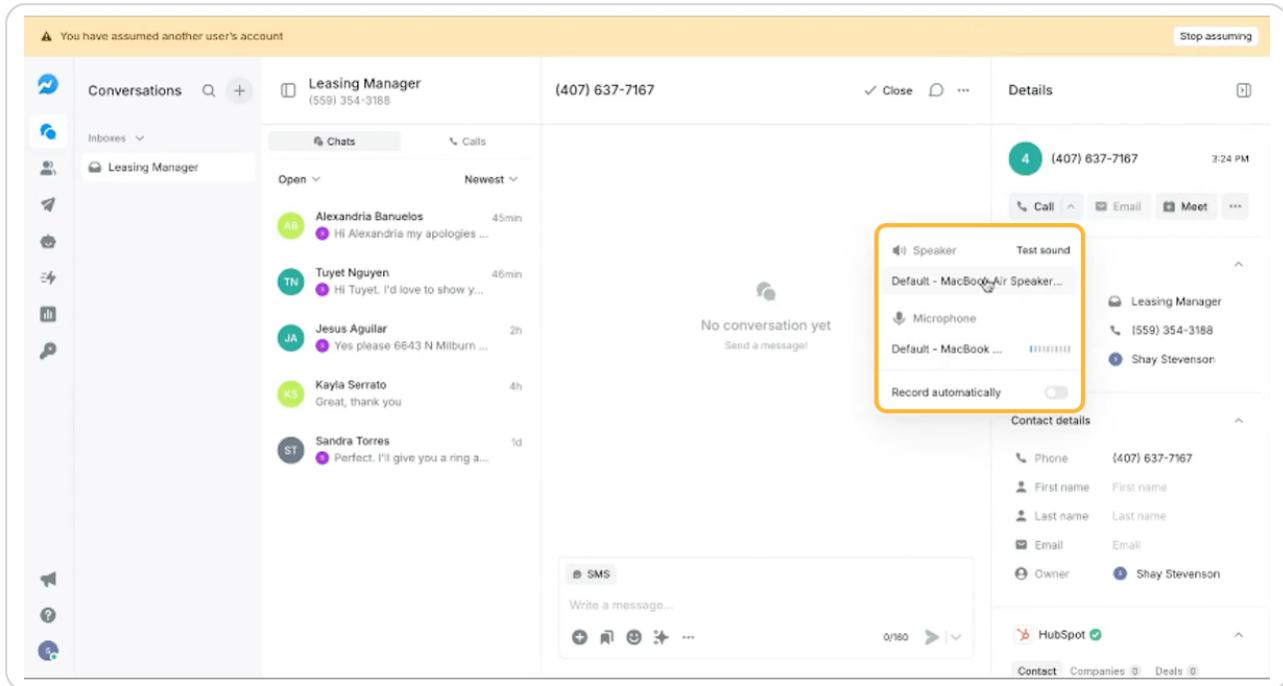
- Phone: (407) 637-7167
- First name: First name
- Last name: Last name
- Email: Email
- Owner: Shay Stevenson

Bottom Section: Includes an "SMS" button, a text input field "Write a message...", and a "0/180" character count.

STEP 41

Make sure you have a Default Speaker and Microphone chosen

Note: It should default to the computer speaker and microphone.



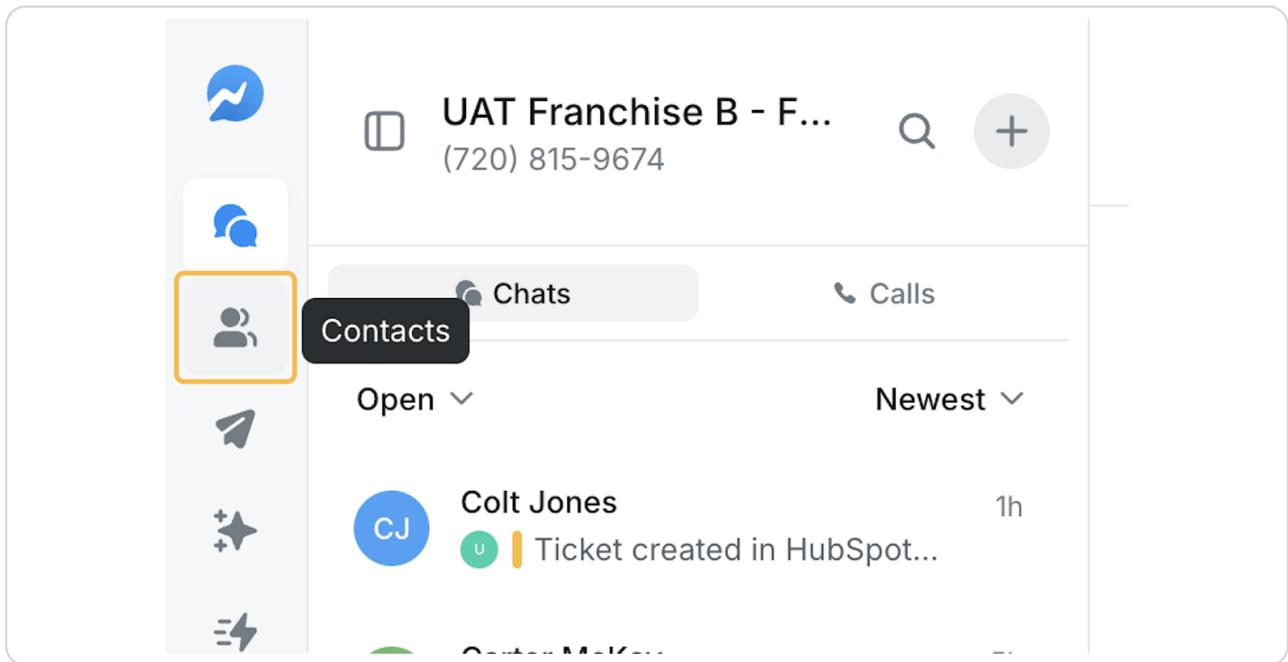
Contacts

6 Steps

i Avoid editing contacts in SalesMsg. Always update Contacts in HubSpot.

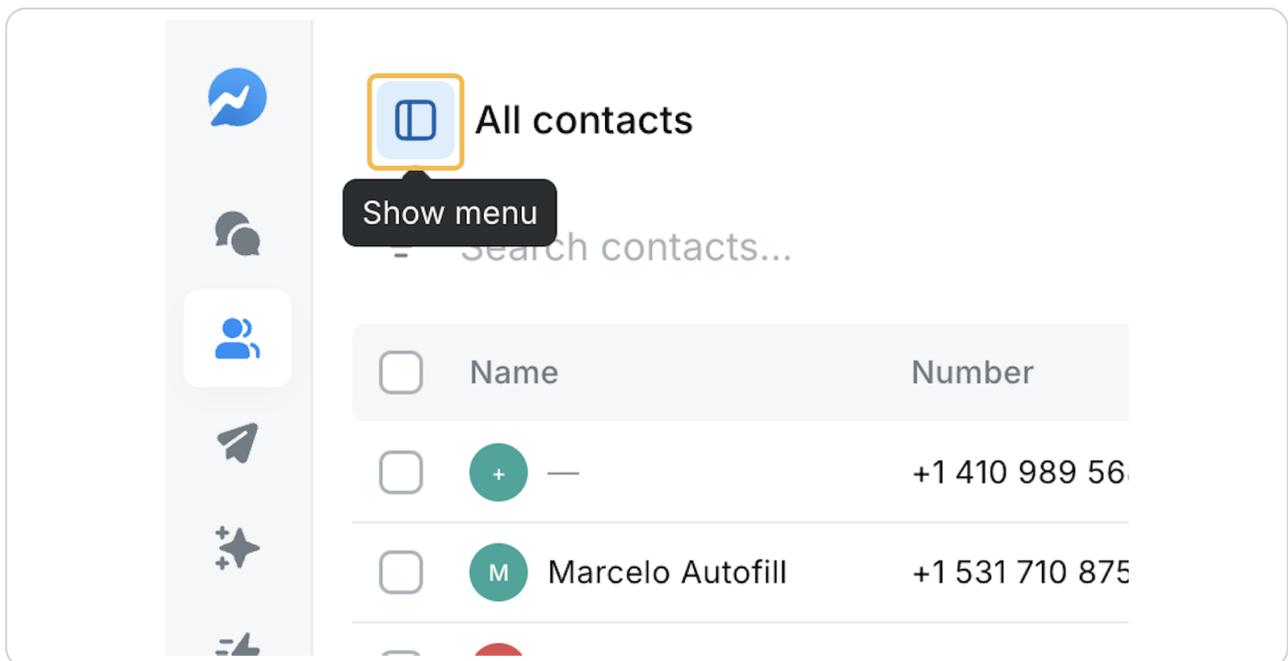
STEP 42

Click on Contacts



STEP 43

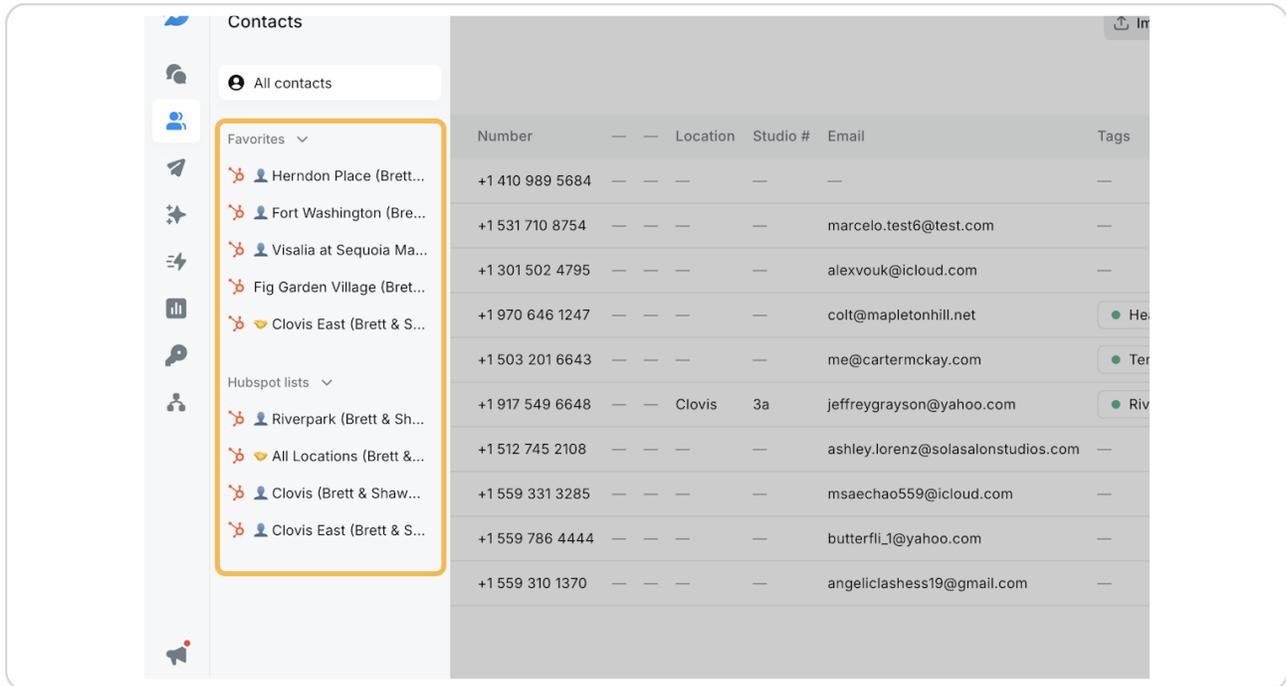
Click on the Menu button (if it is not already showing)



STEP 44

There will be pre-populated segments that are active leads

These will auto-populate from Lists within HubSpot.

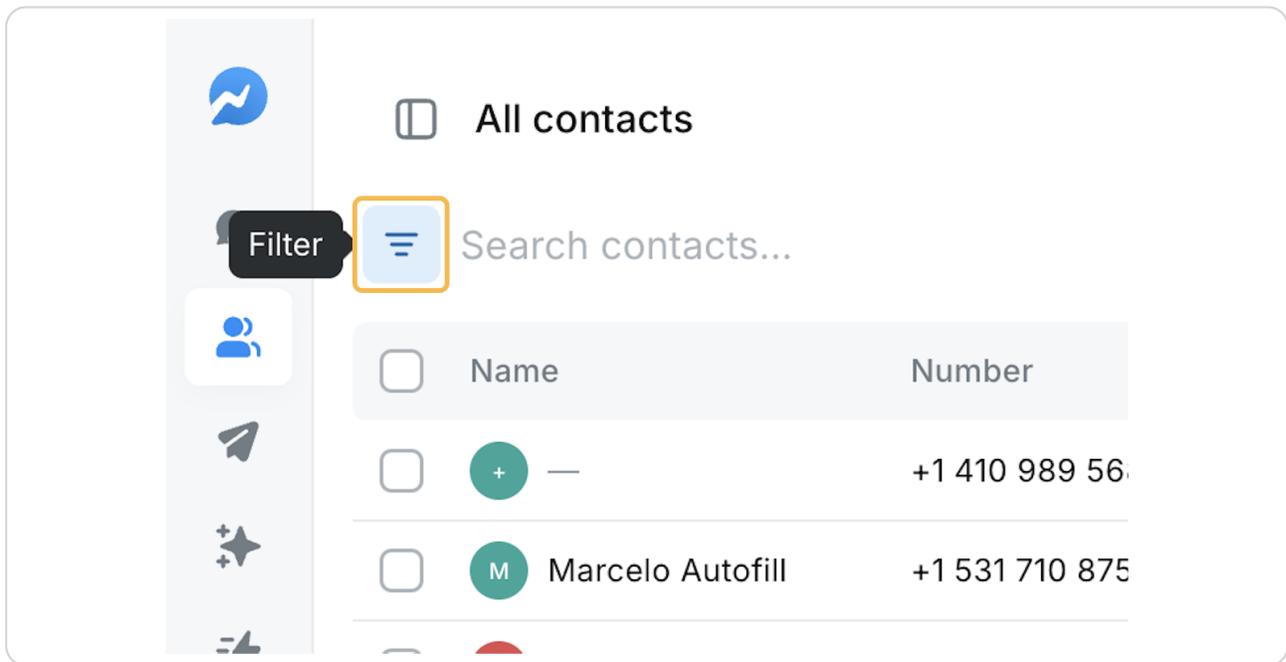


The screenshot displays the HubSpot Contacts interface. On the left, a sidebar contains navigation options: 'All contacts', 'Favorites', and 'Hubspot lists'. The 'Favorites' section is highlighted with an orange box and includes items like 'Herndon Place (Brett...', 'Fort Washington (Bre...', 'Visalia at Sequoia Ma...', 'Fig Garden Village (Bret...', and 'Clovis East (Brett & S...'. The 'Hubspot lists' section includes 'Riverpark (Brett & Sh...', 'All Locations (Brett &...', 'Clovis (Brett & Shaw...', and 'Clovis East (Brett & S...'. The main area shows a table of contacts with columns for Number, Location, Studio #, Email, and Tags.

Number	Location	Studio #	Email	Tags
+1 410 989 5684	—	—	—	—
+1 531 710 8754	—	—	marcelo.test6@test.com	—
+1 301 502 4795	—	—	alexvouk@icloud.com	—
+1 970 646 1247	—	—	colt@mapletonhill.net	He
+1 503 201 6643	—	—	me@cartermckay.com	Ter
+1 917 549 6648	Clovis	3a	jeffreygrayson@yahoo.com	Riv
+1 512 745 2108	—	—	ashley.lorenz@solasalonstudios.com	—
+1 559 331 3285	—	—	msaechao559@icloud.com	—
+1 559 786 4444	—	—	butterfli_1@yahoo.com	—
+1 559 310 1370	—	—	angeliclashess19@gmail.com	—

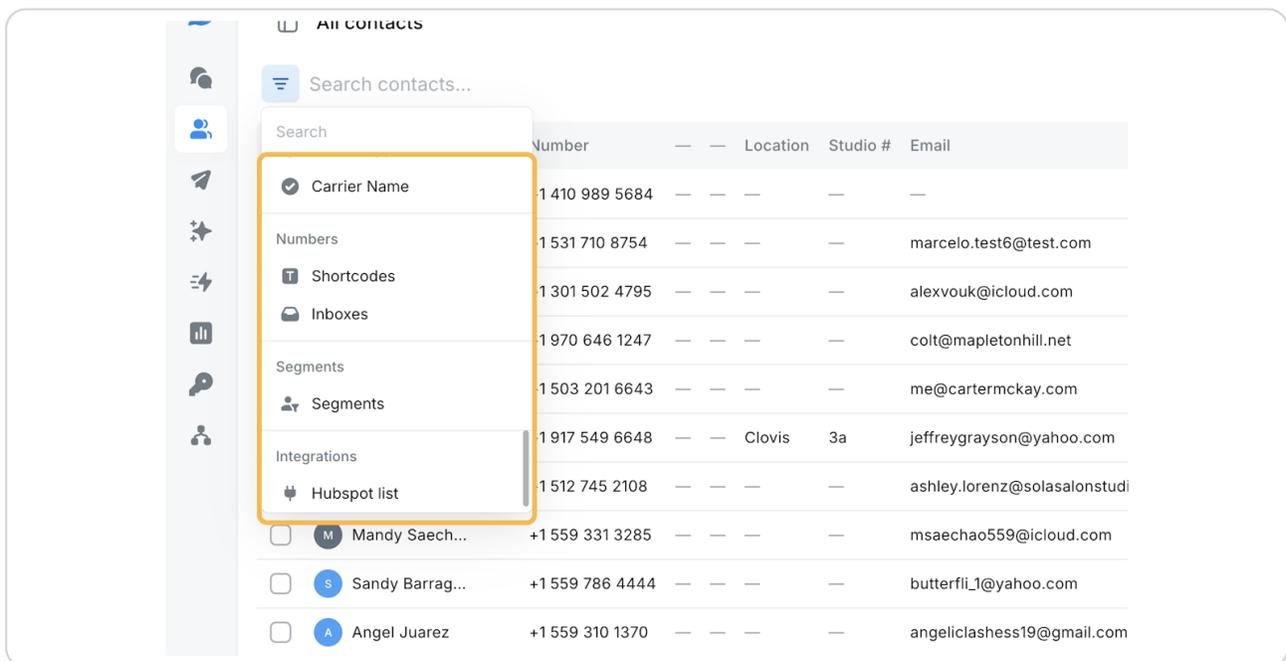
STEP 45

Click the Filter button



STEP 46

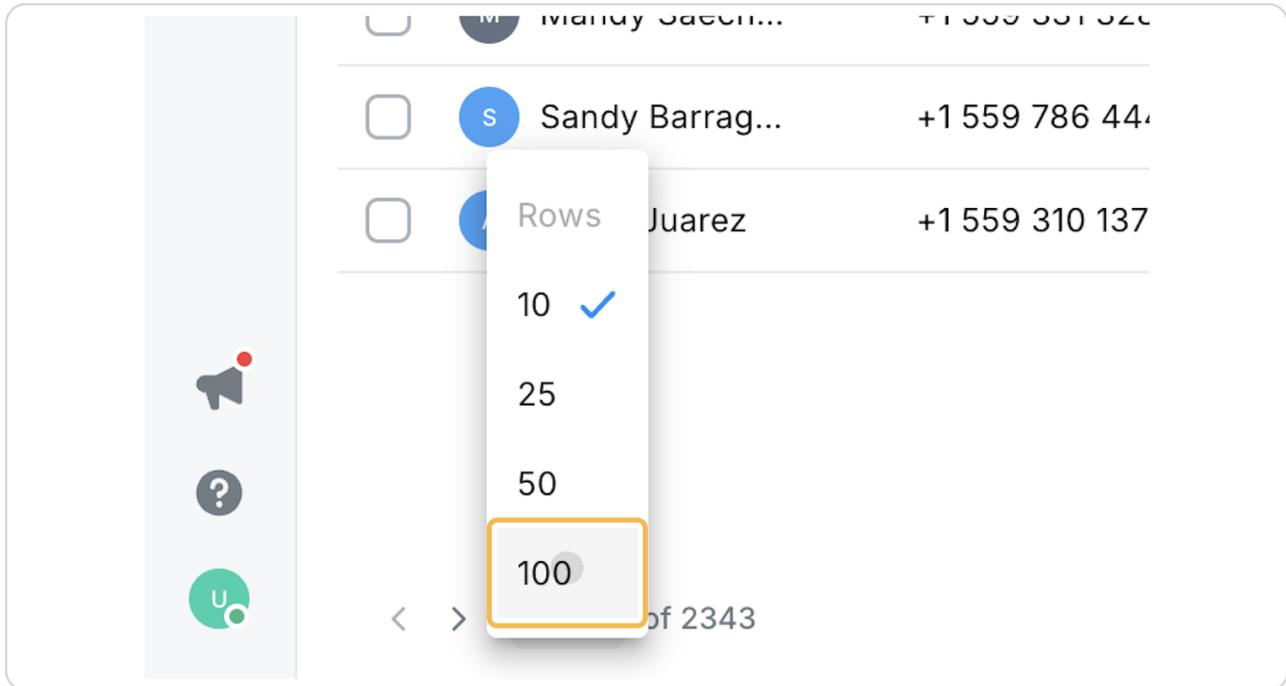
You can filter on a multitude of criteria. This include HubSpot lists



STEP 47

There is an option to expand your view from 10 Contacts up to 100 Contacts

This makes it cleaner, easier, and more efficient to work through any lists.



Broadcasts

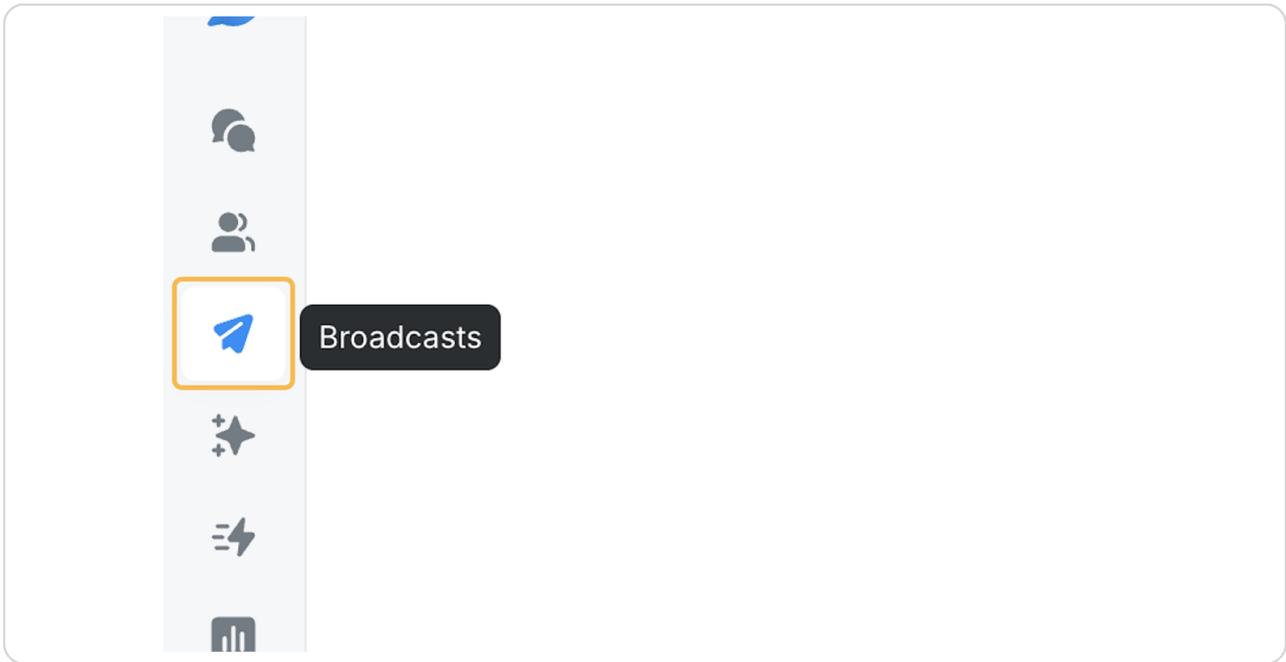
14 Steps

This is a really powerful function if you want to accomplish one to many actions.

i There are integration enhancements coming down the road that you'll want to look out for. Eventually with this feature you'll be able to quickly message all of your Pros at a specific location (or your leads at a specific location) while you're on the go.

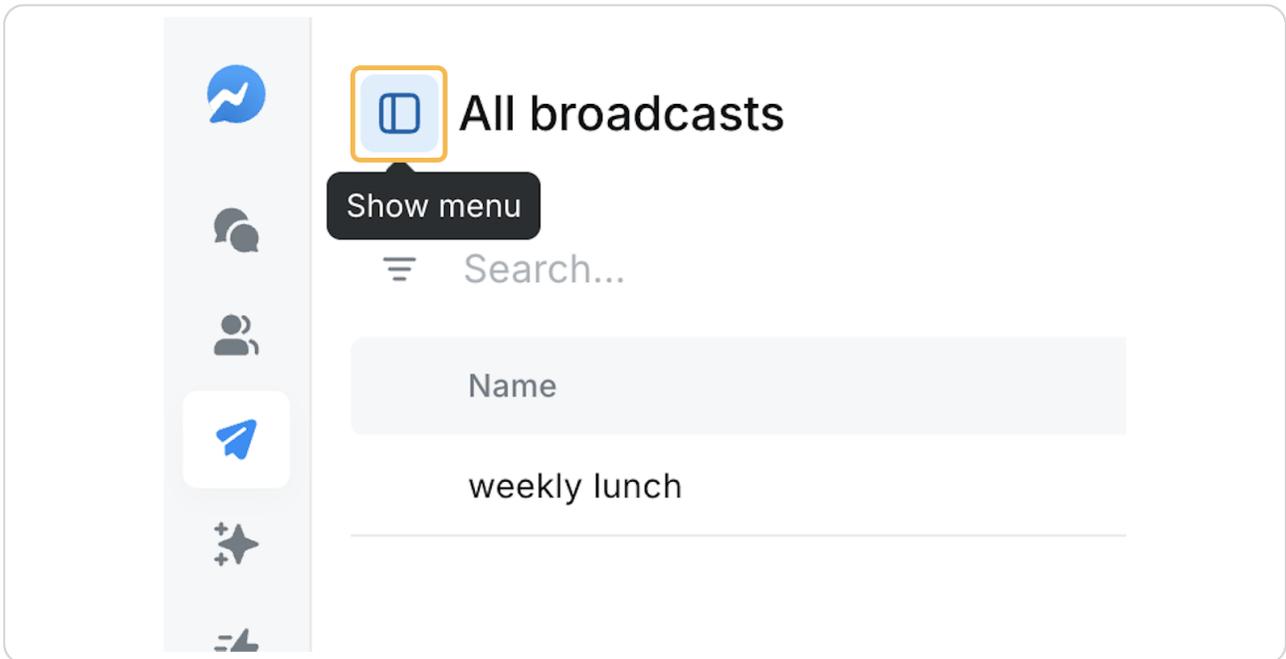
STEP 48

Click on Broadcasts



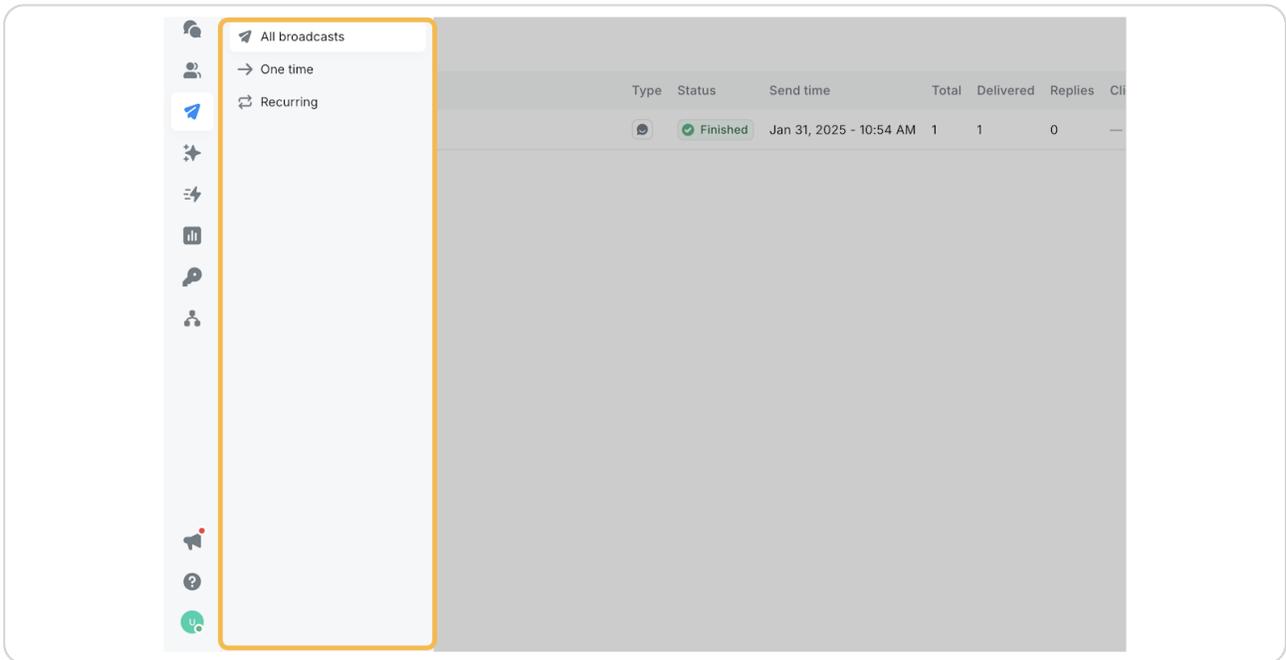
STEP 49

Click on the Menu button (if it is not already open)



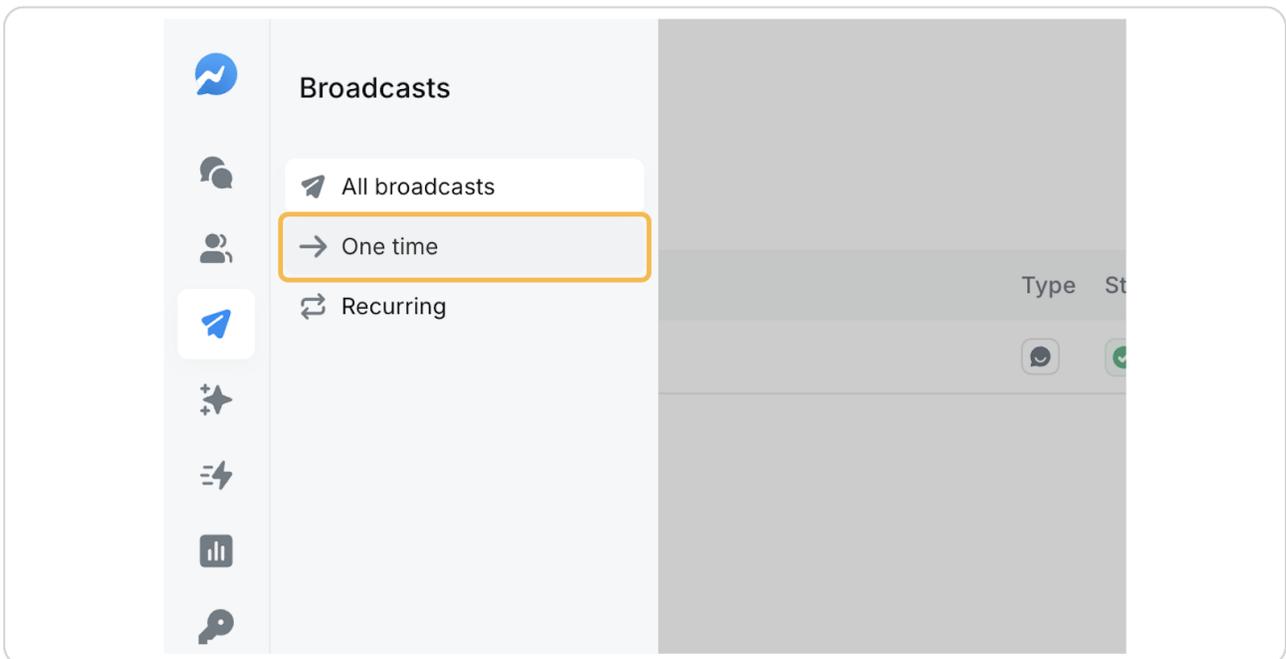
STEP 50

You have the ability to send Broadcasts One time or Recurring



STEP 51

Click on One time



STEP 52

Click on New broadcast

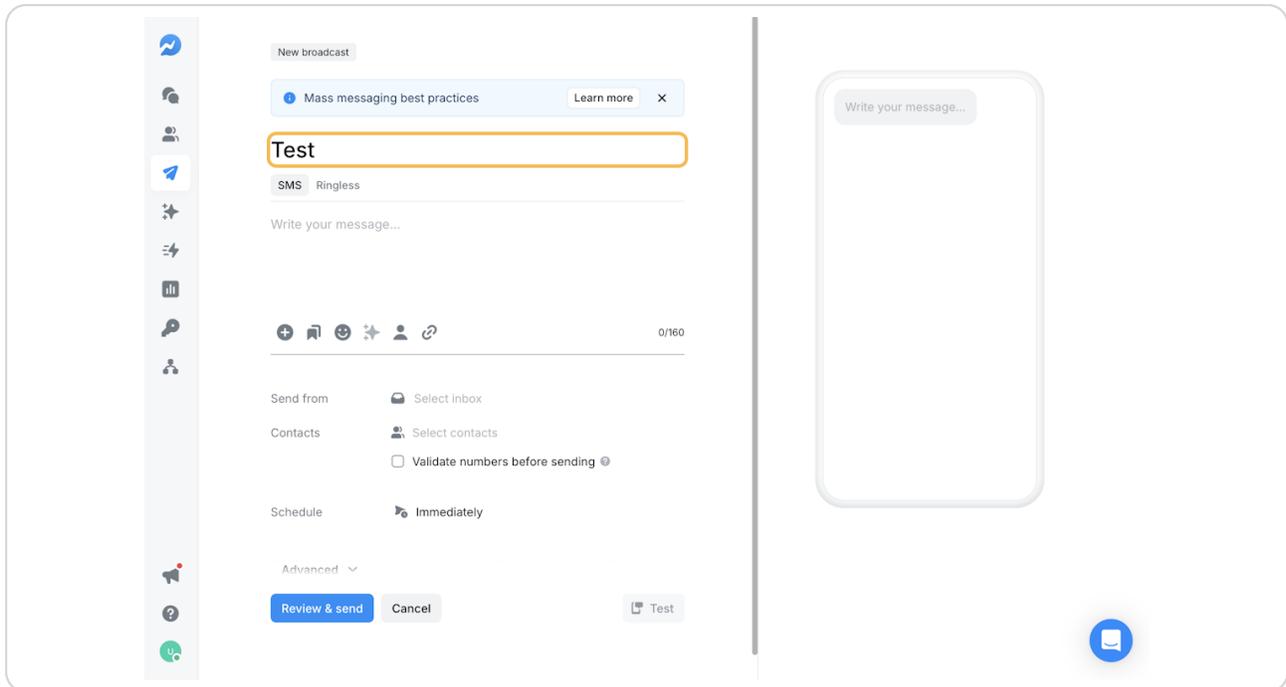
The screenshot shows a user interface for managing broadcasts. At the top right, there is a blue button with a white plus sign and the text '+ New broadcast', which is highlighted with an orange border. Below this is a horizontal line. At the bottom, there is a table with the following data:

	Total	Delivered	Replies	Clicks	Conversion	+
AM	1	1	0	—	—	—

STEP 53

Insert a Broadcast name

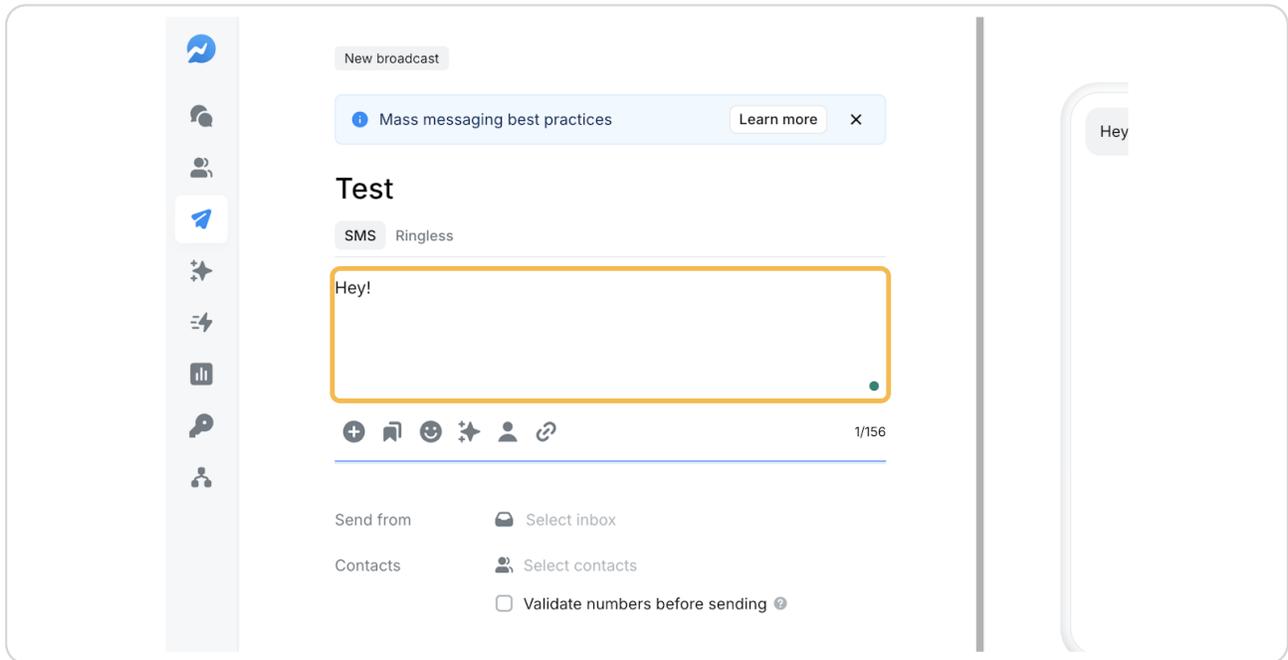
If you want to set up a new Broadcast, you can set up one Broadcast that is a single text message that goes to multiple Contacts. For example: Sending one message to 1,000 Pros.



The screenshot displays the 'New broadcast' configuration screen. At the top, there is a 'New broadcast' header and a 'Mass messaging best practices' link. The main text input field contains the word 'Test'. Below the input field, there are options for 'SMS' and 'Ringless'. A 'Write your message...' placeholder is visible. The interface includes a rich text editor toolbar with icons for adding attachments, emojis, and links, along with a character count of '0/160'. Configuration options include 'Send from' (Select inbox), 'Contacts' (Select contacts, with a 'Validate numbers before sending' checkbox), and 'Schedule' (Immediately). At the bottom, there are 'Advanced' settings, a 'Review & send' button, a 'Cancel' button, and a 'Test' button. A preview of the message is shown on the right side of the screen, and a blue circular button with a white envelope icon is located at the bottom right.

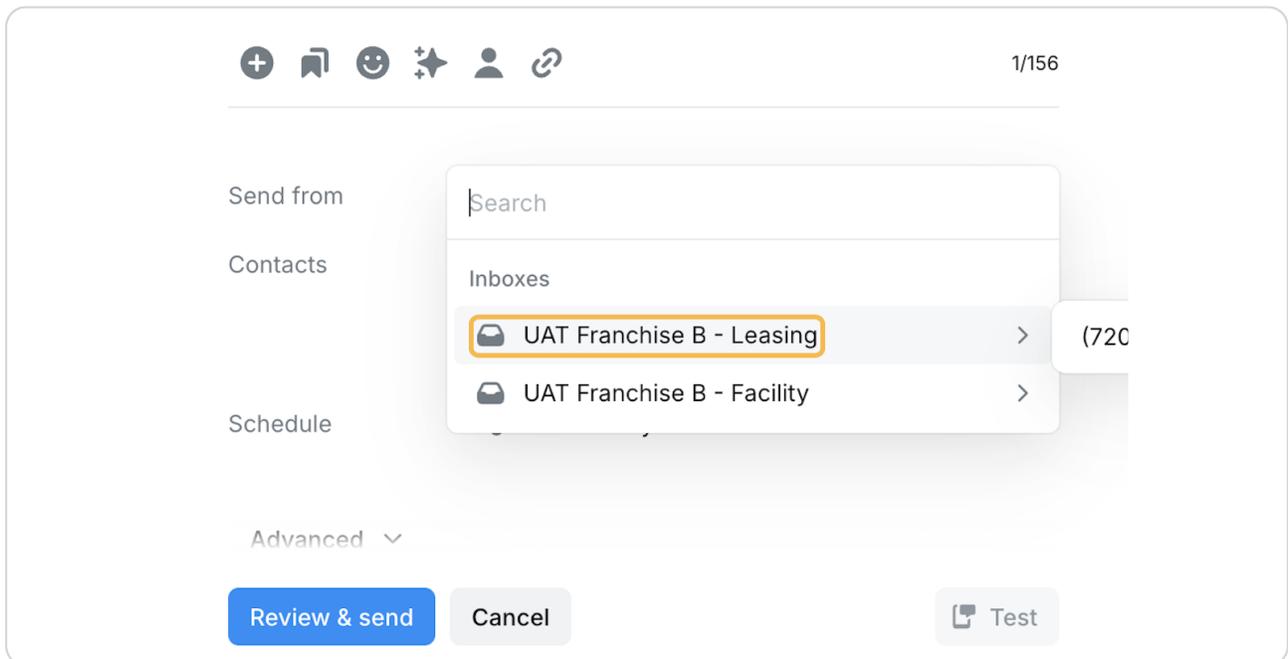
STEP 54

Type in your message



STEP 55

Include where the Broadcast is coming from

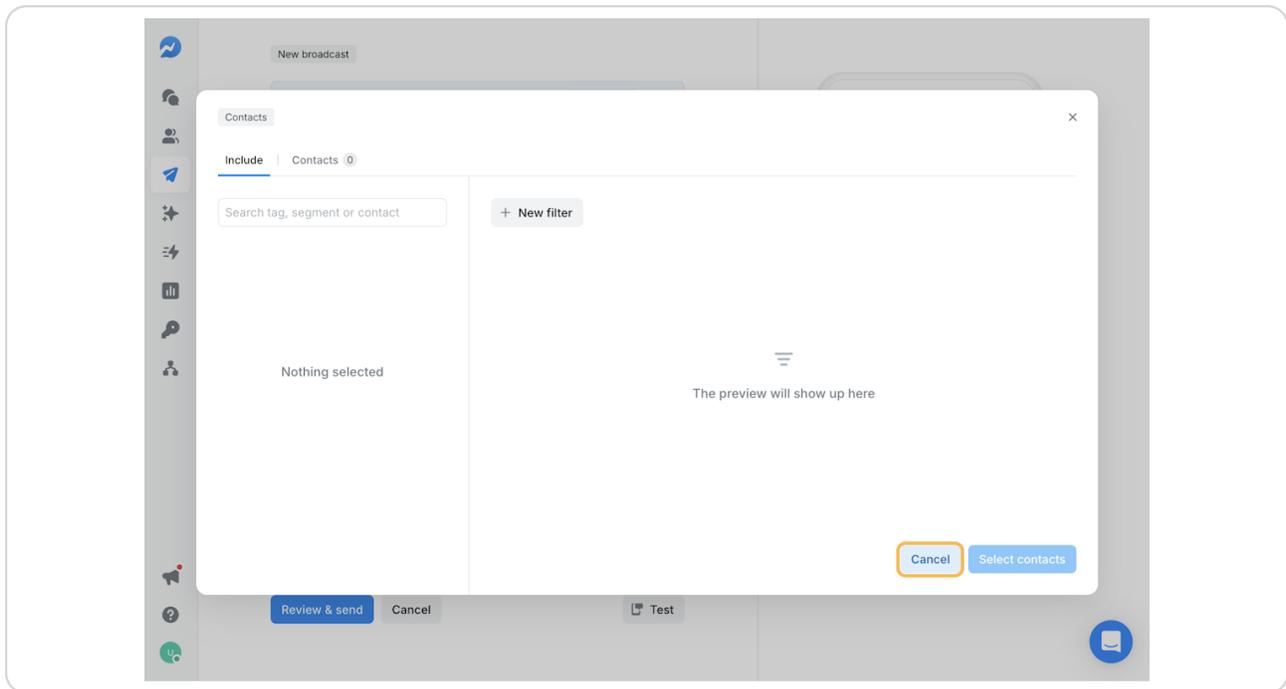


STEP 56

Click on and Select the Contacts that will receive the Broadcast

Note: This is where you can utilize HubSpot Lists to help get broadcasts out to an entire list. You can also add Tags to all of your Contacts to segment them and filter on the Tags that you create.

That way if you want to message just the hairstylists in your Contact list, you can pull those Contacts in easily.



STEP 57

Choose when you would like to send the Broadcast

i Based on the selected number, you can send the message to up to 2,000 contacts per broadcast.

Send from  UAT Franchise B - ... (720) 649-5900

Contacts  Select contacts

Validate numbers before sending **?**

Schedule  **Immediately**

Advanced **▼**

Review & send **Cancel** **Test**

STEP 58

Click on Send later

 UAT Franchise B - ... (720) 649-5900

 Select contacts

Validate numbers before sending **?**

Send immediately **Send later** Recurring

 Advanced scheduling

Cancel **Test**

STEP 59

There is the ability to Use contact timezone

Note: If you use this function, it is based off of area code. There is no guarantee that the call won't wake the Pro up if the number is for New York, but they are visiting LA.

Based on the selected number, you can send the message to up to 2,000 contacts per broadcast.

Send from: UAT Franchise B - ... (720) 649-5900

Contacts: Select contacts

Validate numbers before sending ?

Schedule: Send immediately | **Send later** | Recurring

Advanced ▾

Feb 27, 2025

6:30 PM

Review & schedule

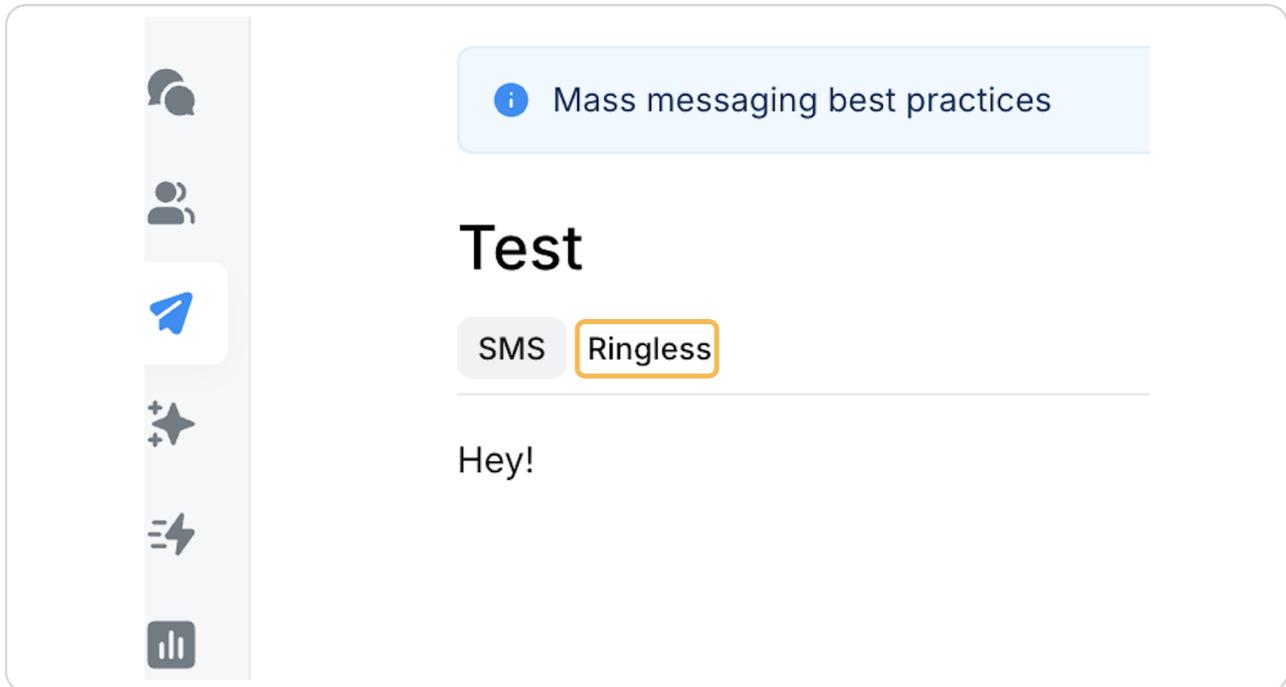
Use contact timezone

Advanced scheduling

STEP 60

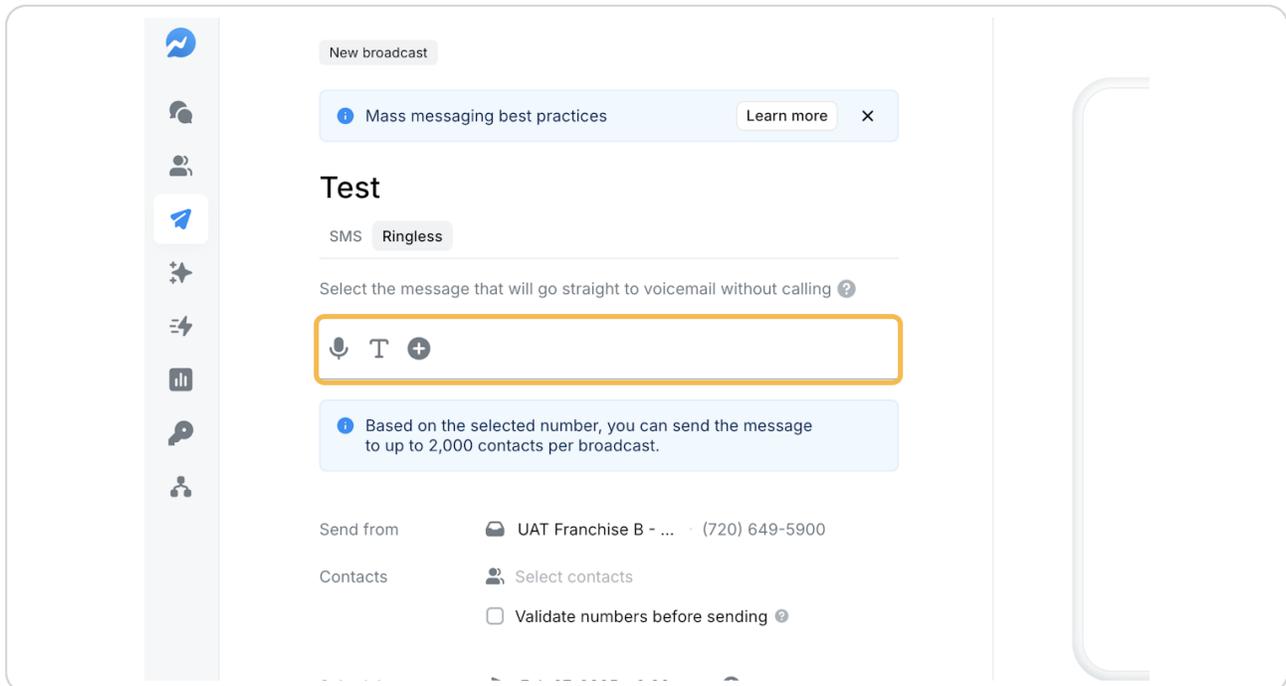
Click on Ringless

This is a really powerful tool. For example you could send a Ringless voicemail (a voicemail that will immediately pop up on the Pro's phone without it dialing) and then follow it up with a text message that says "Hey, we just left you a voicemail."



STEP 61

For these messages you can record the audio or do text to audio



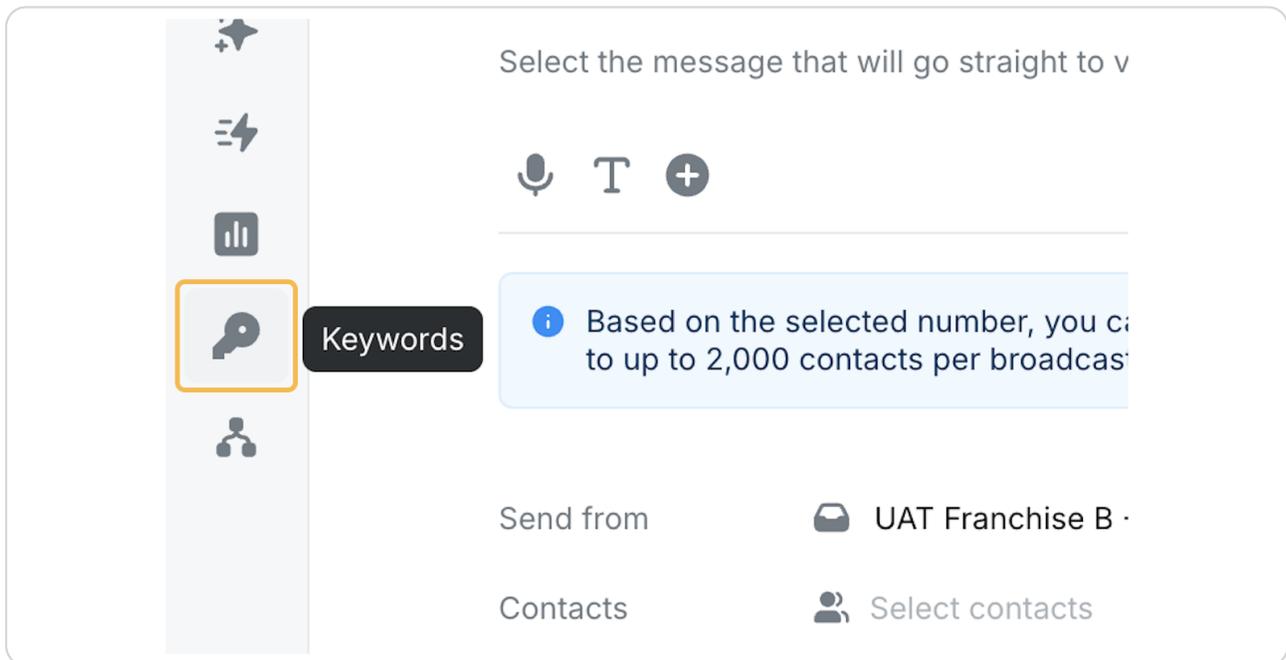
Keywords

7 Steps

Think of this as any promotional texts.

STEP 62

Click on Keywords



Select the message that will go straight to v

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Keywords

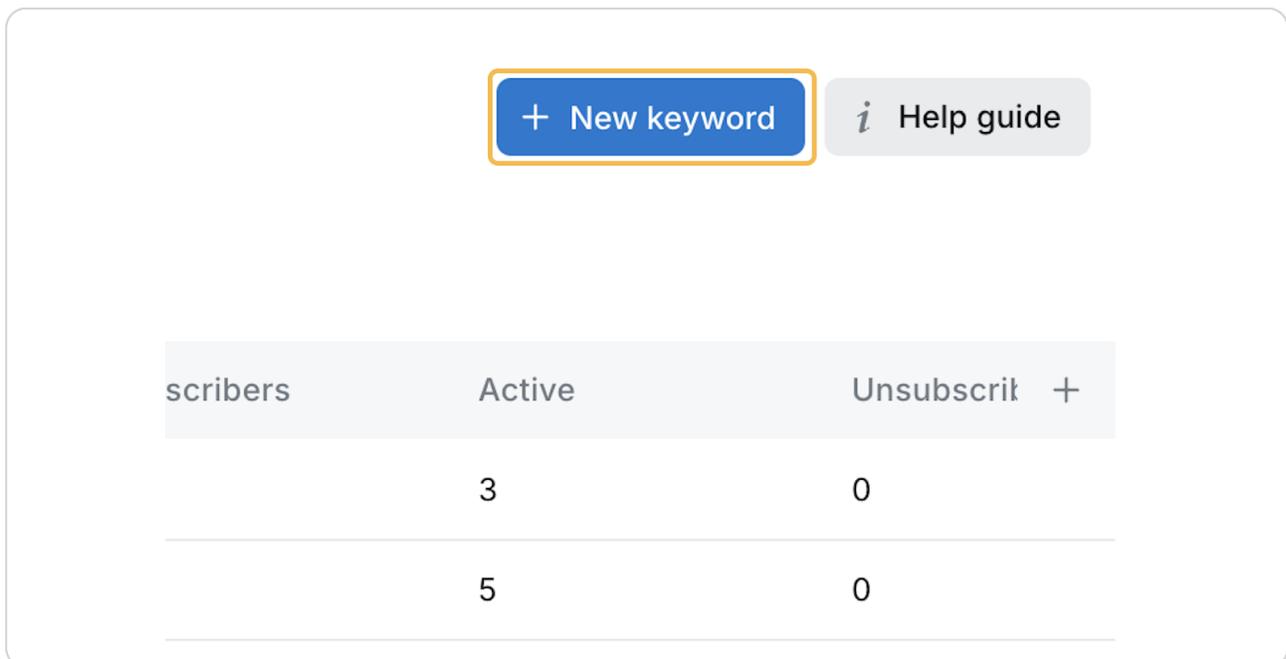
i Based on the selected number, you can send messages to up to 2,000 contacts per broadcast

Send from  UAT Franchise B

Contacts  Select contacts

STEP 63

Click on New keyword

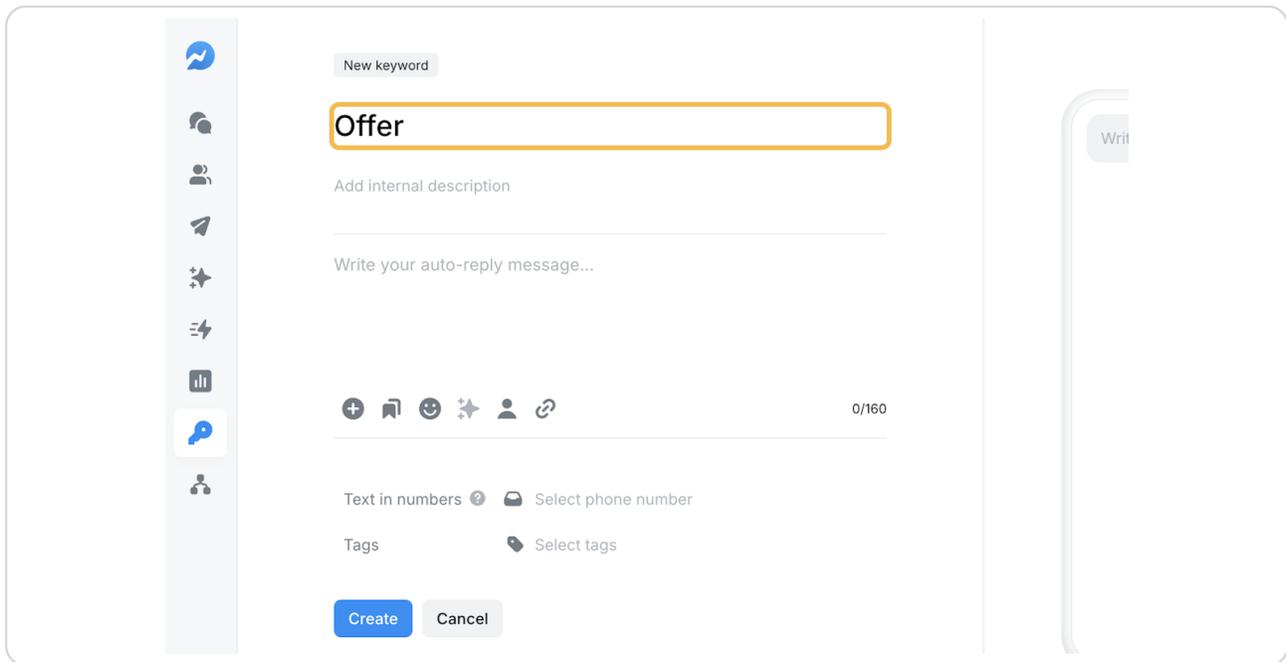


+ New keyword *i* Help guide

scribers	Active	Unsubscrib +
	3	0
	5	0

STEP 64

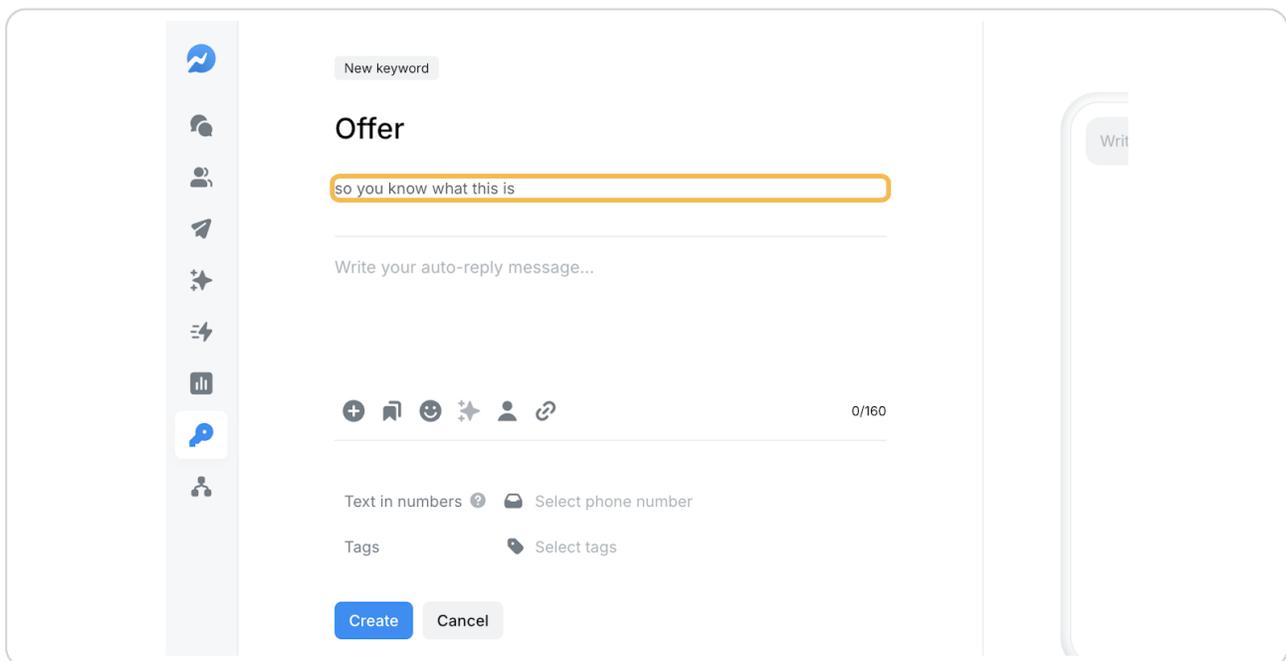
Type in a Name



The screenshot shows a user interface for creating a new keyword. On the left is a vertical sidebar with various icons, including a blue speech bubble icon at the top. The main area is titled "New keyword" and features a text input field containing the word "Offer". Below the input field are sections for "Add internal description" and "Write your auto-reply message...". At the bottom of the main area, there are icons for adding content (plus sign, document, smiley face, star, person, link) and a character count "0/160". Below these are options for "Text in numbers" (with a lock icon), "Select phone number", "Tags", and "Select tags". At the very bottom are "Create" and "Cancel" buttons. On the right side of the interface, a partial view of a "Write" text area is visible.

STEP 65

Include a description



This screenshot is identical to the previous one, but the "Add internal description" field now contains the text "so you know what this is". The rest of the interface, including the sidebar, input fields, icons, and buttons, remains the same.

STEP 66

Type the message

The screenshot shows a message creation interface. At the top, there is a 'New keyword' field. Below it, the title 'Offer' is displayed, followed by the text 'so you know what this is'. A large text input field is highlighted with an orange border and contains the placeholder text 'Type in your message'. Below the input field is a toolbar with icons for adding attachments, emojis, tags, and sharing. To the right of the toolbar is a character count '1/140'. Below the toolbar are two sections: 'Text in numbers' with a help icon and a 'Select phone number' button, and 'Tags' with a 'Select tags' button. At the bottom are 'Create' and 'Cancel' buttons. On the far right, a vertical sidebar contains a 'Type' button.

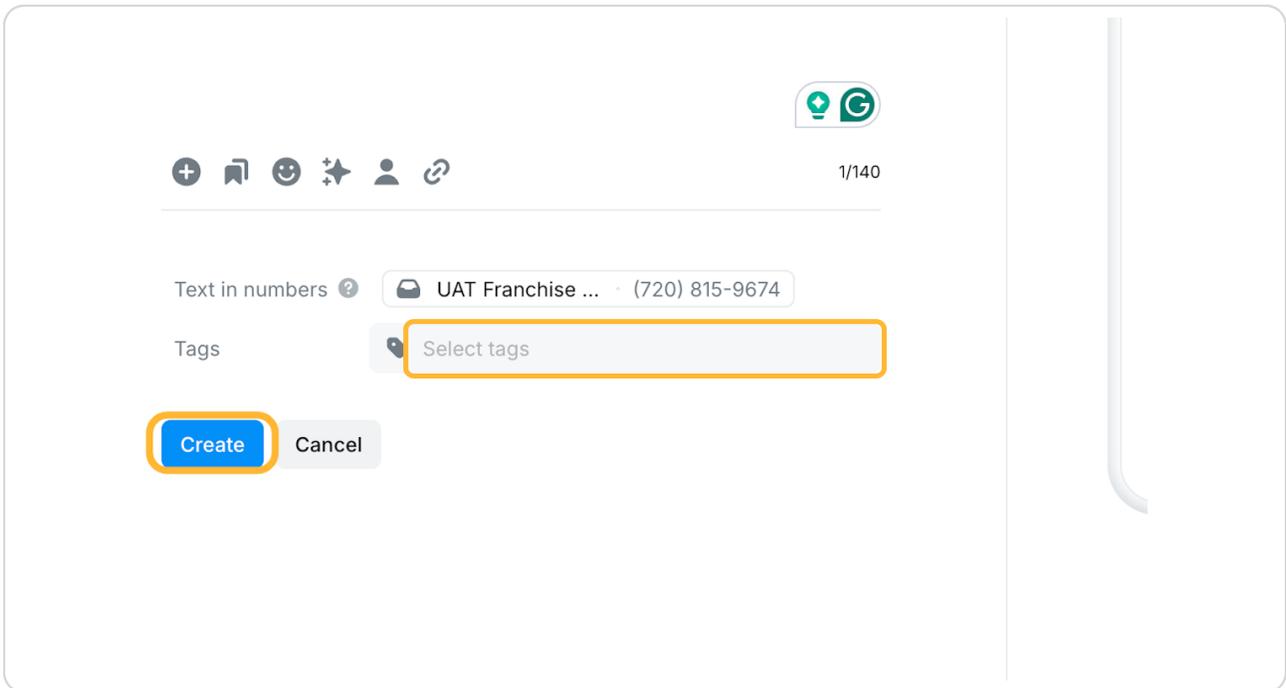
STEP 67

Select where the message is coming from

The screenshot shows the 'Tags' selection menu. The menu is open, displaying a search bar at the top. Below the search bar, the word 'Inboxes' is listed. Two inboxes are visible: 'UAT Franchise B - Leasing' and 'UAT Franchise B - Facility'. The 'UAT Franchise B - Leasing' option is highlighted with an orange border. To the right of each inbox name is a right-pointing chevron and a label: 'Local' for the first and '(720)' for the second. Below the menu are 'Create' and 'Cancel' buttons.

STEP 68

Select a Tag and Click Create



The screenshot shows a contact creation interface. At the top right, there is a green icon with a lightbulb and a circular arrow, and the text "1/140". Below this is a row of icons: a plus sign, a document, a smiley face, a star, a person, and a link. A horizontal line separates this from the main form area. The form contains a "Text in numbers" field with a question mark icon, containing the text "UAT Franchise ..." and "(720) 815-9674". Below this is a "Tags" field with a tag icon and the text "Select tags", which is highlighted with an orange border. At the bottom left, there are two buttons: a blue "Create" button and a grey "Cancel" button, both highlighted with orange borders.

