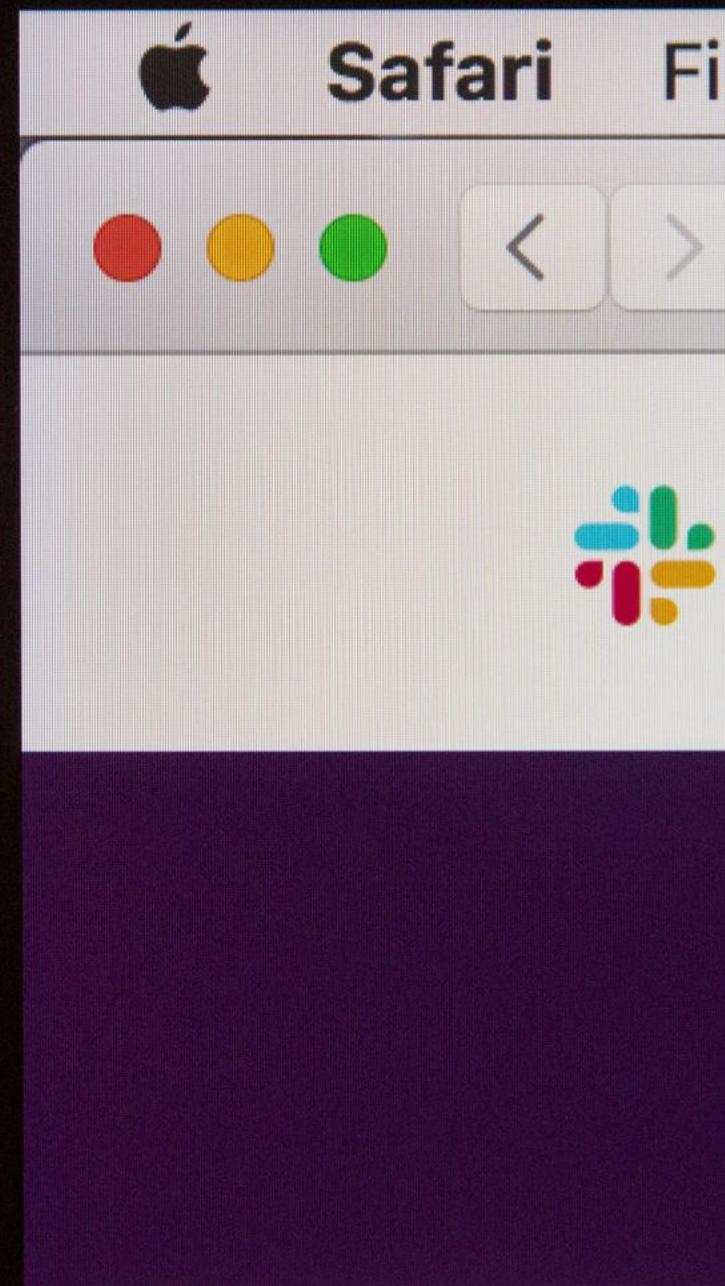


Salesforce Slack Integration Guide

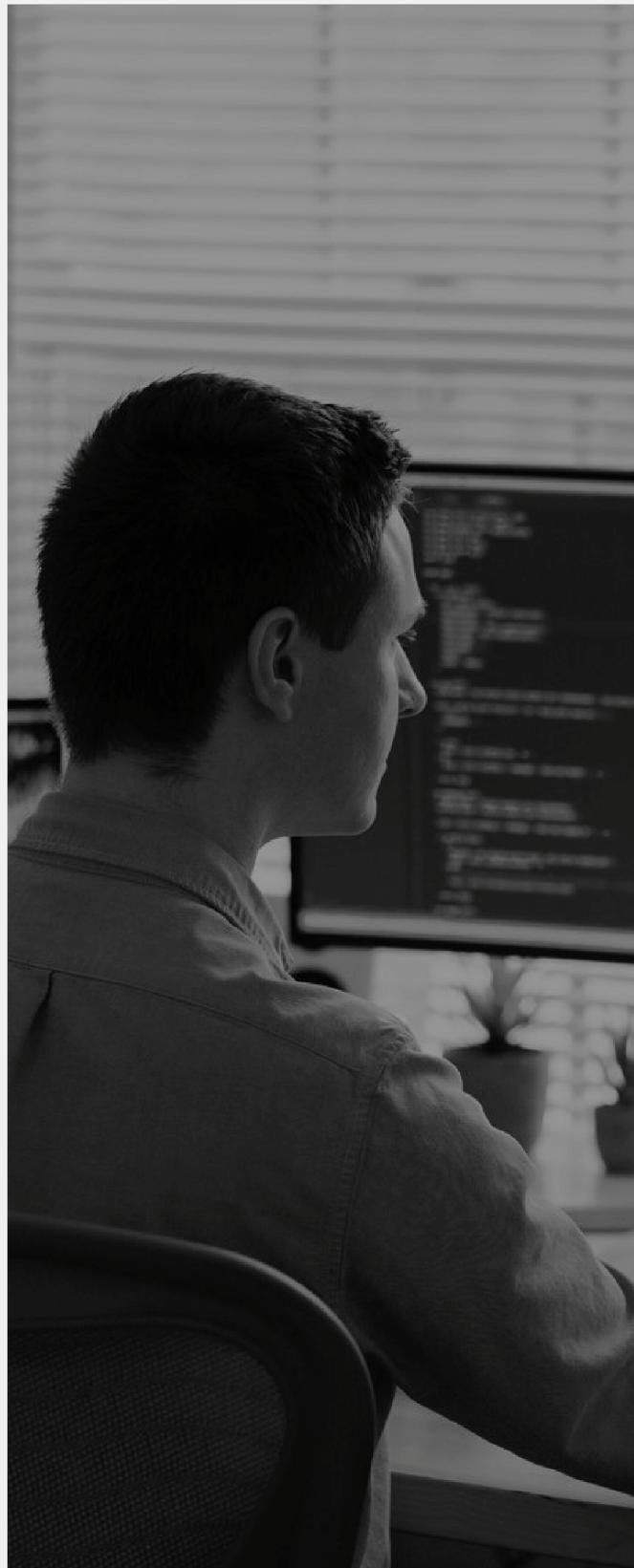
Created by: Salma Elsayed

PURPOSE

This document will serve as a comprehensive technical training guide, providing step by step instructions to individuals on how to integrate Salesforce with Slack.



OBJECTIVES



1



To train staff on how to successfully install Salesforce for Slack and grant permissions

2



To create a Custom Alert and Add Slack to the User Interface

3



To automate slack messages to relay when changes to a Salesforce record have been made

4



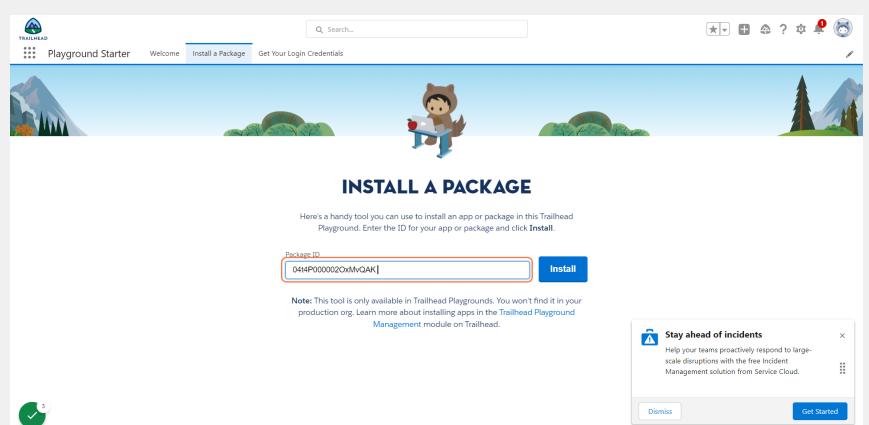
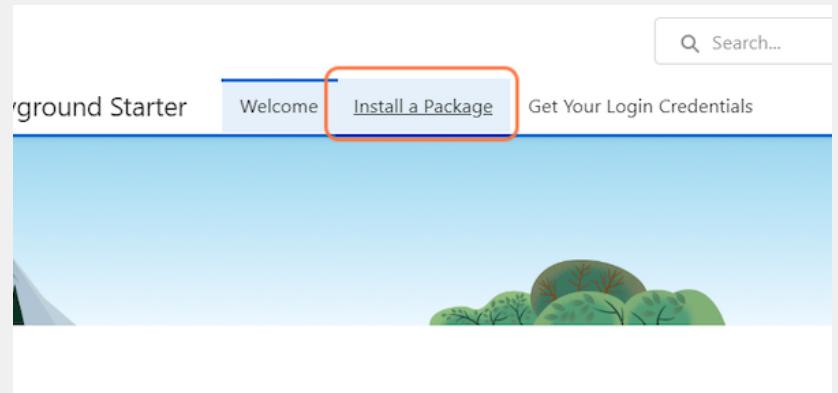
To test the automation to ensure successful Salesforce and Slack integration

INSTRUCTIONS: Installation and Access

Step 1

Install Salesforce For Slack

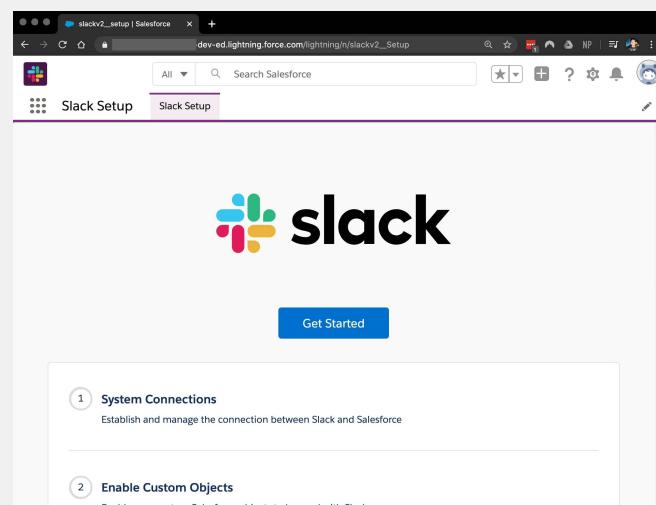
- ▶ Login into Salesforce
- ▶ Go to **App Launcher > Playground Starter** > Install a Package
- ▶ Paste **04t4P000002OxMvQAK** into the package ID field > **Install for Admins Only > Install**
- ▶ Check "Yes, grant access to these third party websites" > Click Continue to complete the installation



Step 2

Enable Slack Platform Access

- ▶ Go to **App Launcher > Slack Setup**
- ▶ Click Get Started > Authorize > Finish
- ▶ *** Slack has been granted access to your salesforce account

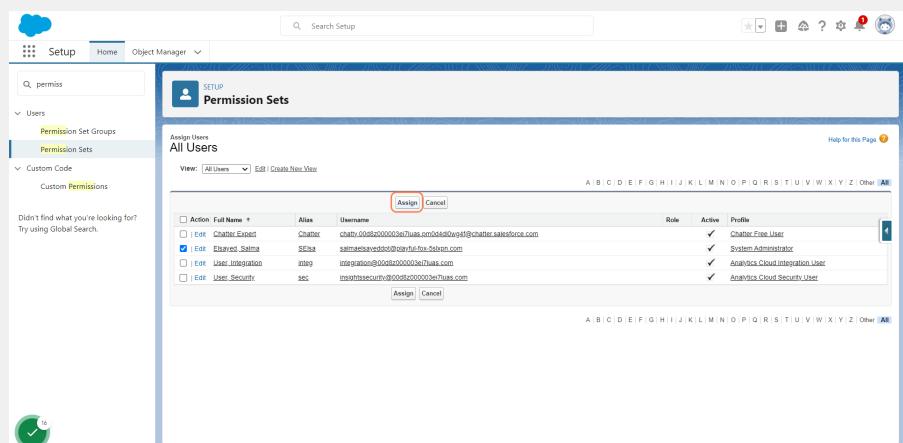


INSTRUCTIONS: Permissions & Alerts

Step 3

Grant User Permissions

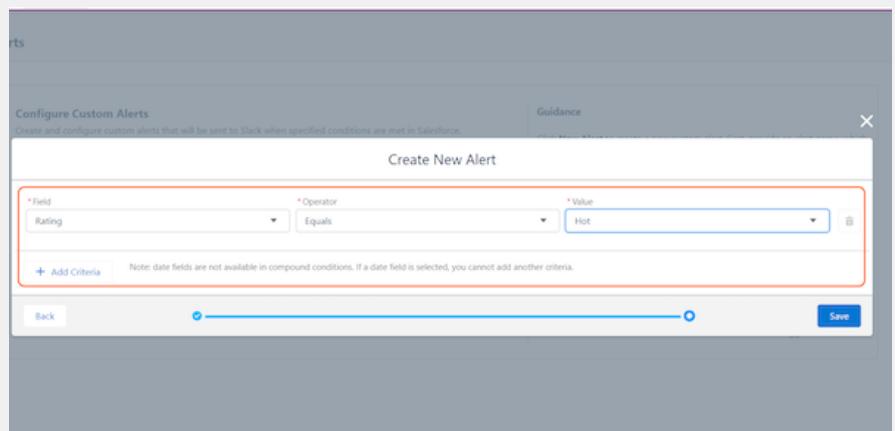
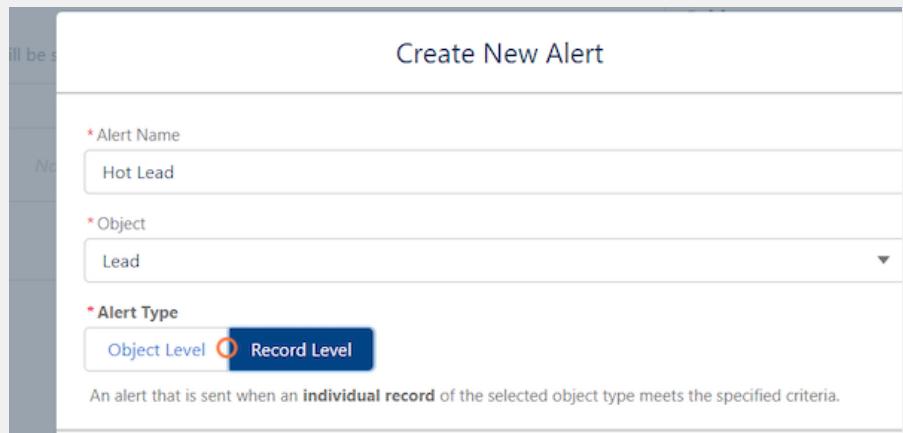
- ▶ Click on the Set Up gear icon
 - ▶ Enter permission in Quick Find and select **Permission Sets**.
 - ▶ Click **Slack Standard User** >Manage Assignments > **Add Assignments**
 - ▶ Check the box next to your user profile, then click **Assign** > Done
 - ▶ ***User permission has been granted, allowing the assigned user to share information via slack



Step 4

Set Up Custom Alerts

- ▶ Go to App Launcher > Slack Setup
 - ▶ Click **Continue** to set up Custom Alerts
 - ▶ Click **New Alert** and fill out the required fields as follows then click **Next:**
 - Alert Name: Hot Leads
 - Object: **Lead**
 - Alert Type: **Record Level**
 - ▶ Specify the criteria as follows:
 - Field: **Rating**
 - Operator: **Equals**
 - Value: **Hot**
 - ▶ Click **Save** and **Finish** to complete the custom alert
 - ▶ *** A custom alert has been set up so Salesforce sends a notification to Slack when a lead turns hot



INSTRUCTIONS: Workspaces & Channels

Step 5

Add Slack Actions

- ▶ Go to App Launcher > **Slack Setup**
- ▶ Click **Continue** to set up Org Configuration
- ▶ Click **Add Actions to Layouts**
- ▶ Uncheck all layouts by clicking on the box next to the Layout Name header > Select ONLY the **Lead** layouts
- ▶ Click **Add Actions to Layouts** > **Next** > **Finish**
- ▶ ***A custom alert has now been created, allowing the sales team to message people right from Salesforce.

Layout Name ↑	Type	Create
<input type="checkbox"/> Global Layout	Global	Salm...
<input checked="" type="checkbox"/> Lead (Marketing) Layout	Lead	Salm...
<input checked="" type="checkbox"/> Lead (Sales) Layout	Lead	Salm...
<input checked="" type="checkbox"/> Lead (Support) Layout	Lead	Salm...
<input checked="" type="checkbox"/> Lead Layout	Lead	Salm...
<input type="checkbox"/> Opportunity (Marketing) Layout	Opportunity	Salm...

Step 6

Create a Slack Workspace

- ▶ Login to Slack account > **Create A New Workspace** and follow the prompts
- ▶ Type "**announcements**" when asked "What is your team working on?" > **Next**
- ▶ *** A new workspace has now been created.

Step 7

Create a Slack Channel

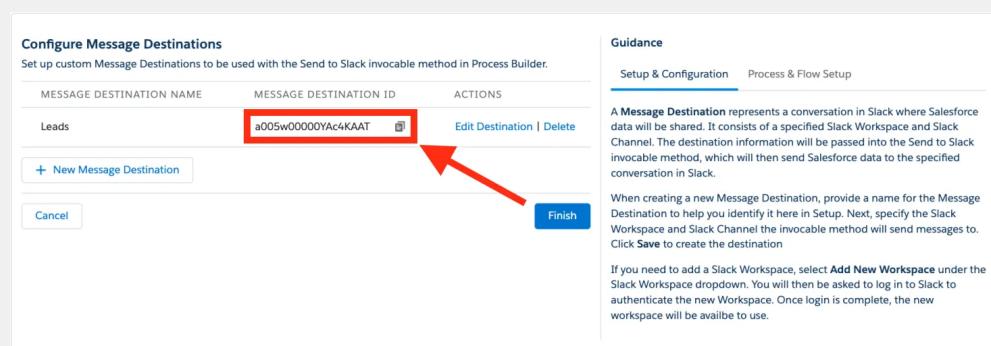
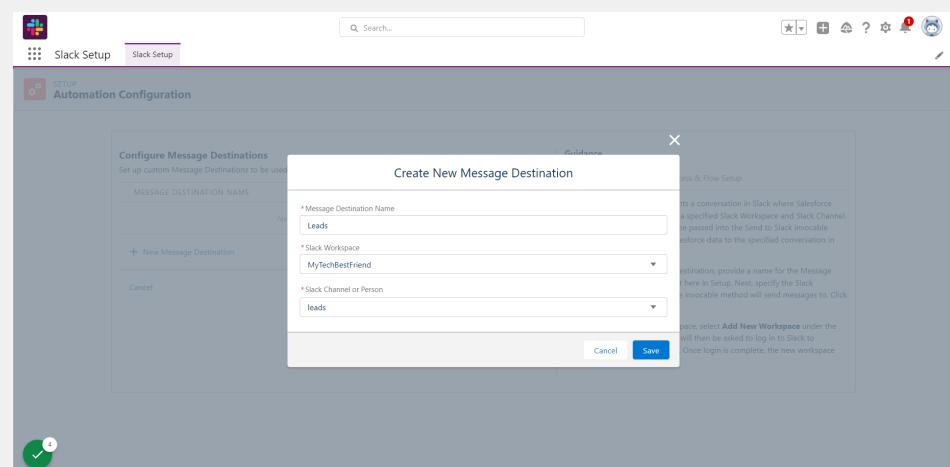
- ▶ Click **Add Channels** > Select **Create New Channel** from drop down menu
- ▶ Enter '**leads**' for channel name > **Create**
- ▶ Toggle on the option to auto-add anyone who joins your workspace > **Save**
- ▶ ***A new Slack channel has now been created for all lead alerts.

INSTRUCTIONS: Building Automations

Step 8

Create Custom Message Destinations

- ▶ Go to App Launcher > **Slack Setup**
- ▶ Click **Continue** to set up Automation Configuration
- ▶ Click **Sign in with Slack** to open the popup and authenticate your Slack workspace
- ▶ Click New Message Destination and fill out the fields as follows:
 - Message destination name: **Leads**
 - Slack Workspace: leave as-is
 - Slack Channel or Person: **leads**
- ▶ Click **Save**
- ▶ Copy the message destination ID to copy it. Save in a place where you can retrieve it later.
- ▶ Click **Finish**



Step 9

Build Automation with Process Builder

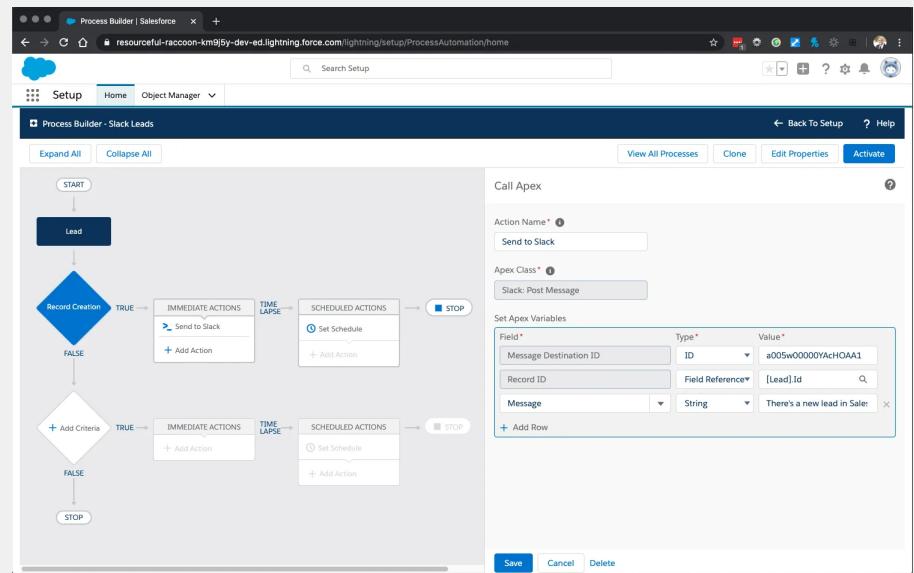
- ▶ Go to **Setup** > **Process Builder** > **New**
- Click **Continue in Process Builder** to build a new automation. Fill out the fields as follows:
 - Label: Slack Leads (API will automatically generate)
 - The process starts when: A record changes
- ▶ Click **Save**
- ▶ ***A process has now been created to send new leads to slack

INSTRUCTIONS: Building Automations

Step 10

Automate New Leads

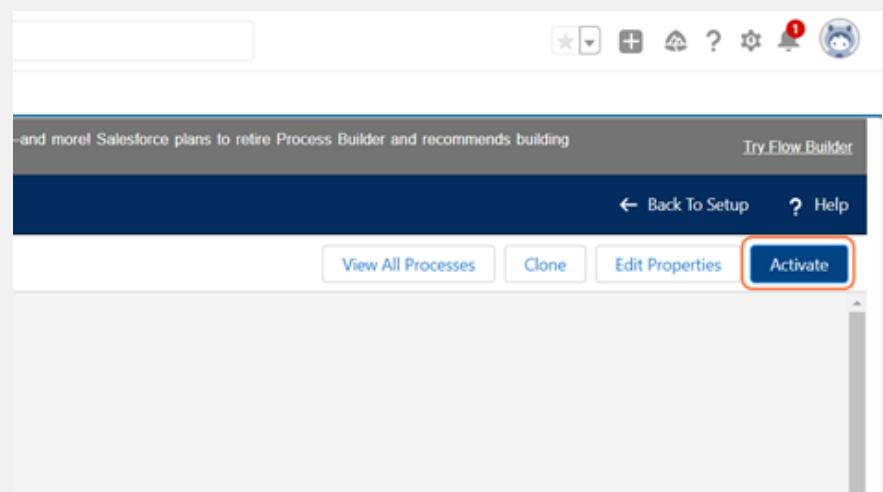
- ▶ Click **Add Object**
 - Select **Lead** for Object Field
 - Make sure **only when a record is created** is selected
- ▶ Click **Save**
- ▶ Click **Add Criteria**
 - Enter **Record Creation** for Criteria Name.
 - Make sure **No criteria—just execute the actions!** is selected.
- ▶ Click **Save**
- ▶ ***This process will be activated when new leads are created.



Step 11

Add a Message for Context

- ▶ Click **Add Action** and fill out the fields:
 - Action Type: **Apex**
 - Action Name: **send to slack**
 - Apex Class: **Slack: Post Message**
 - Message Destination ID: Paste the destination ID copied in Step 8
 - Record ID > Field Reference > select **Lead ID**
- ▶ For the last variable, click **Add Row**
 - Message > String > enter **There's a new lead in Salesforce!**
- ▶ Click **Save** > **Activate** > **Confirm**
- ▶ ***An automation has now been created.

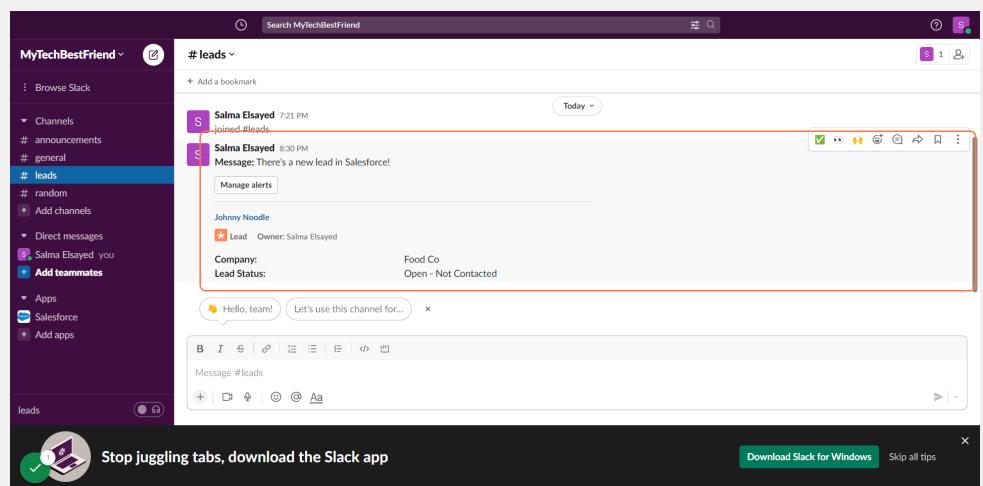


INSTRUCTIONS: Test Your Slack Automation

Step 12

Create a New Lead

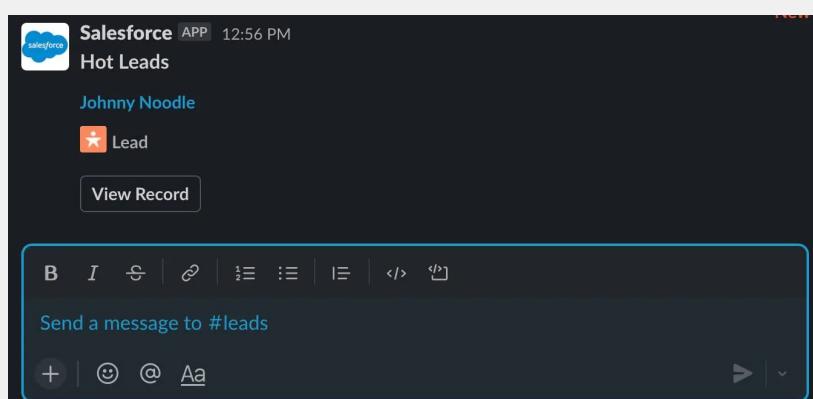
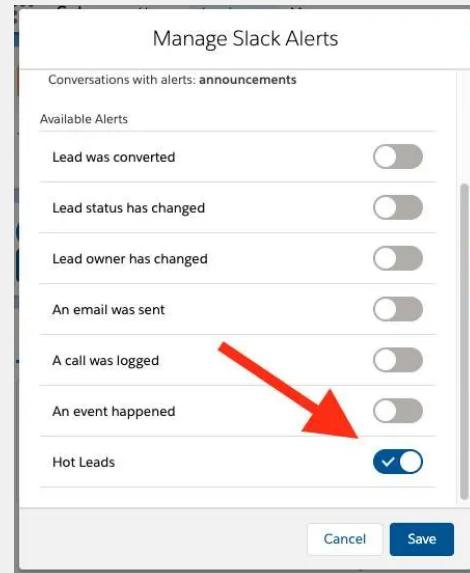
- ▶ Go to **App Launcher > Sales**
- ▶ Click on the **Leads** tab > **New Lead** and fill out the fields as follows:
 - First Name: Johnny
 - Last Name: Noodle
 - Company: Food Co
- ▶ Click on **Save**
- ▶ Go to your Slack workspace > Click the **leads** channel
- ▶ ***A new lead notification in slack is now visible in the leads channel, which ensures that the automation created is functioning effectively!



Step 13

Set a Slack Alert

- ▶ Back in Salesforce > **Sales > Leads** > select the lead you just created for "**Johnny Noodle**"
- ▶ Click **Slack Alerts**
 - Ensure your Slack workspace is selected
 - For **Slack Channel**, select **Leads**
 - Toggle the Hot Leads alert as on
- Click **Save**
- ▶ ***An alert will now be sent to the Slack leads channel when changes are made to the Hot Leads field



- ▶ ***A message will be visible under direct messages, in the Slack workspace, indicating changes made to the Hot Leads record for this Lead

 slack

