2022 TRAINING MANUAL

SLACK INTEGRATION WITH SALESFORCE

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MANUAL OVERVIEW

Hi All! My name is Chelsea and I will be guiding you throughout this training manual. This training manual is designed to show step-by-step how to integrate Slack with Salesforce. Ready to get started?
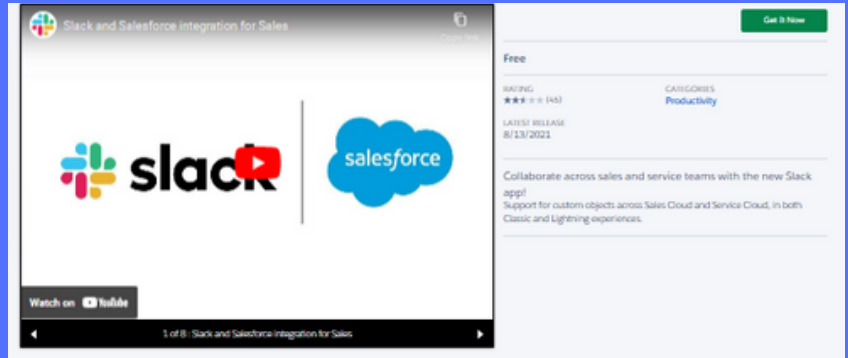
salesforce

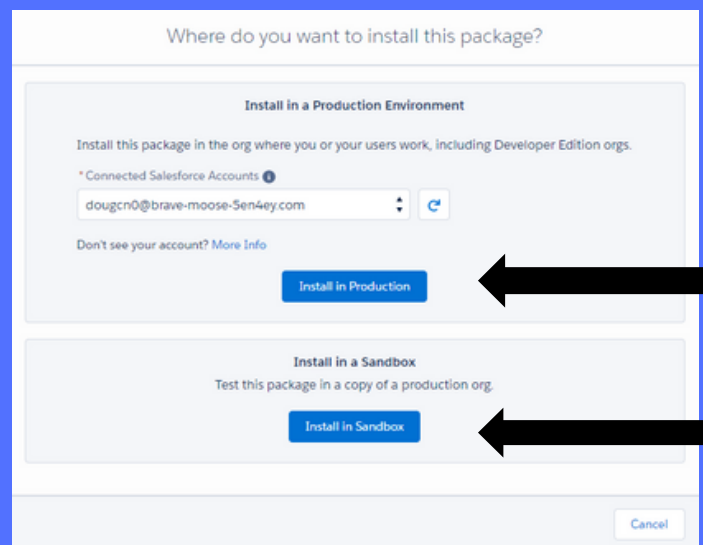# HOW TO GUIDE: SLACK INTEGRATION WITH SALESFORCE

INSTRUCTIONS
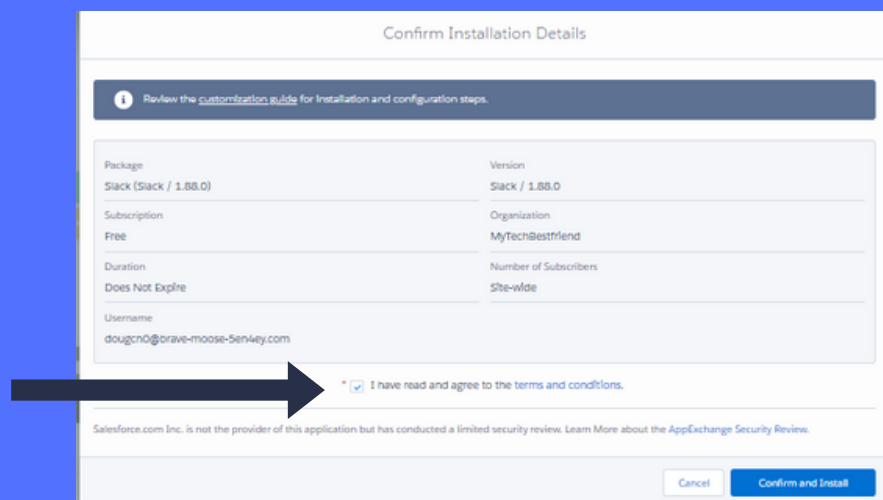
STEP 1

Installing Salesforce for Slack

> Go to appexchange.salesforce.com and select the "Get Now" button to proceed.

> Next, select the type of production environment you would like to install.

> Check the terms and conditions box and proceed by clicking the confirm and proceed button

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CONTINUING STEP 1

▶ **Select install for all users or set to your own preferences, then select install.**
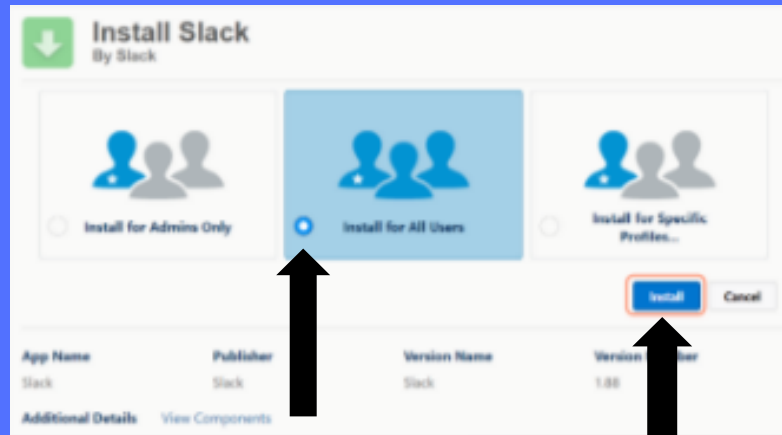
▶ **Lastly, approve third-party access and proceed with clicking continue.**

STEP 2

Set Up Custom Object Settings

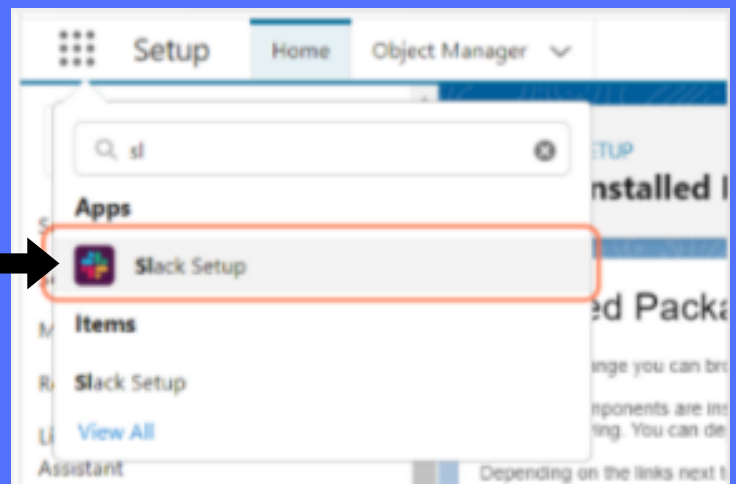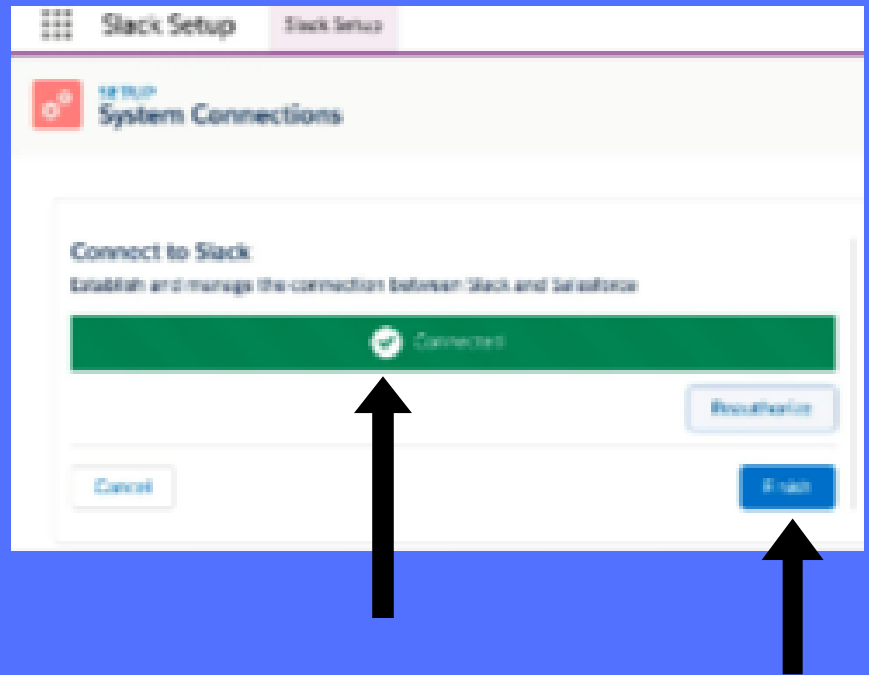▶ **Under set up enter "Slack Setup" in the search bar and click the get started button.**
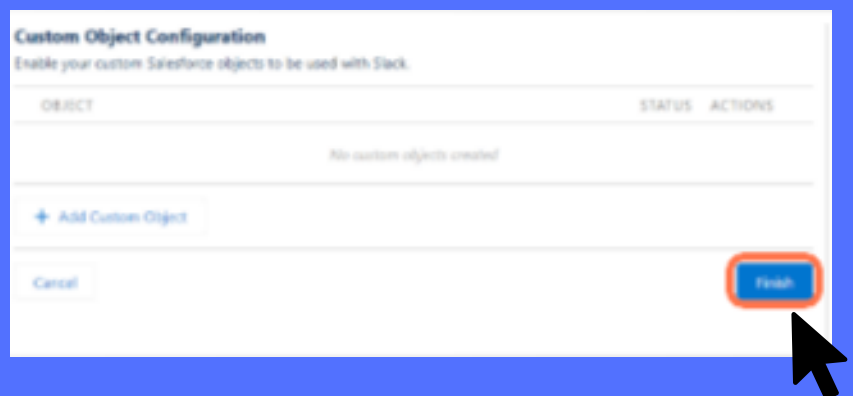
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CONTINUING STEP 2

➤ **Select authorize and then click the finish button**
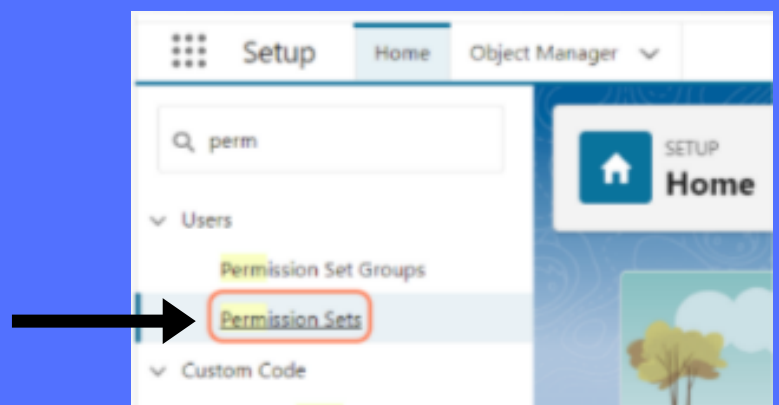

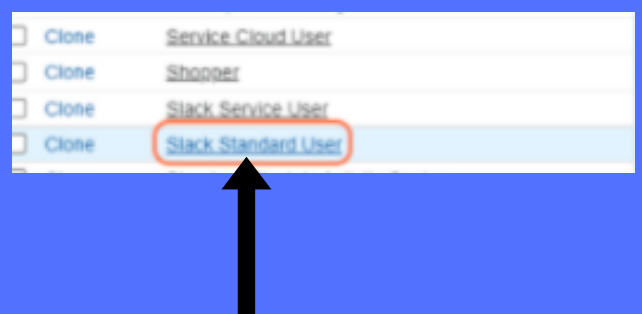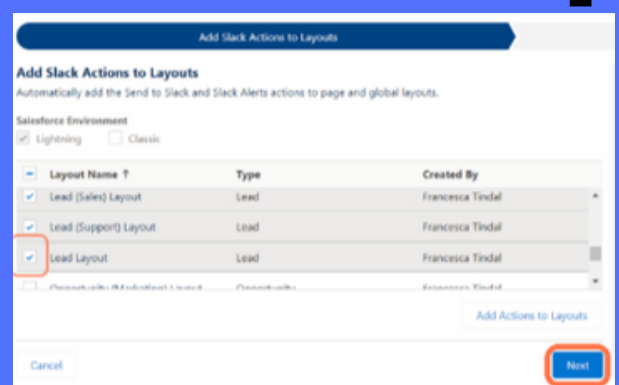➤ **Proceed by clicking continue to enable custom objects. Lastly, click the finish button.**

STEP 3

Configure Custom Alerts

➤ **Go to setup, in the text box type and select "permission sets"**

➤ **Next, select Slack Standard User**

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CONTINUING STEP 3

▶ **Select Manage Assignments**

▶ **Select the Add Assignment button**

▶ **Choose a user and then select assign and click done**

▶ **Go to Slack Setup, next click continue to set up the custom alert**

▶ **Next, specify the criteria and then click the save button, then click finish**

▶ **Now, we need to select the relevant layout and then click the next button**
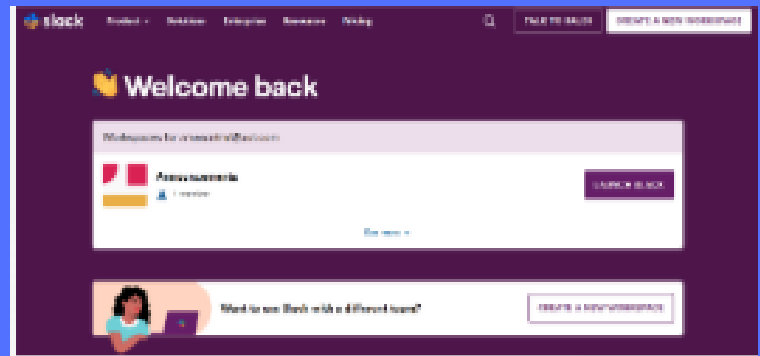
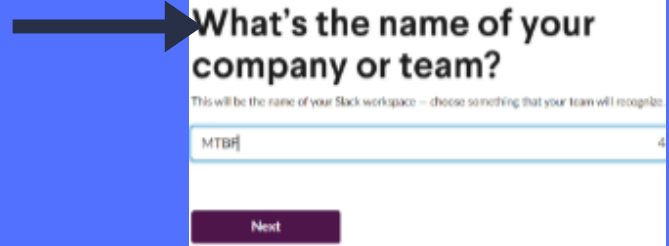# HOW TO GUIDE: SLACK INTEGRATION WITH SALESFORCE
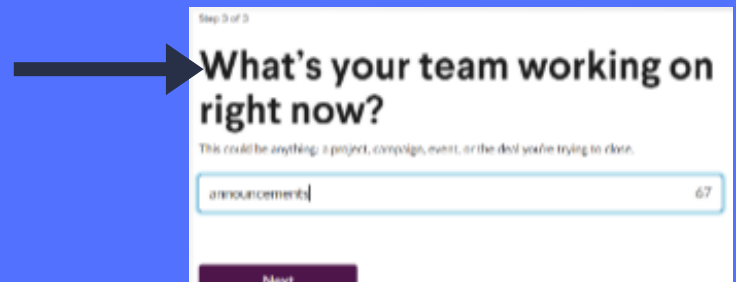
STEP 4

Create a Slack Workspace

➤ Go to www.slack.com, from here if you do not already have a workspace you need to click "try for free". If you do have a workspace you will need to select "create another workspace"
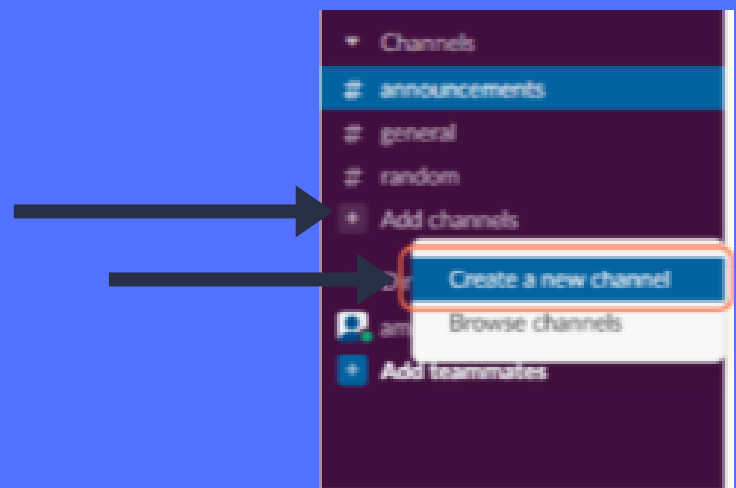

➤ Create a Team Name

➤ Next, specify "what your team is working on"

➤ Then, select "add channels" and click "create new channel

➤ On this screen you will need to enter a "channel name" and select the "create" button

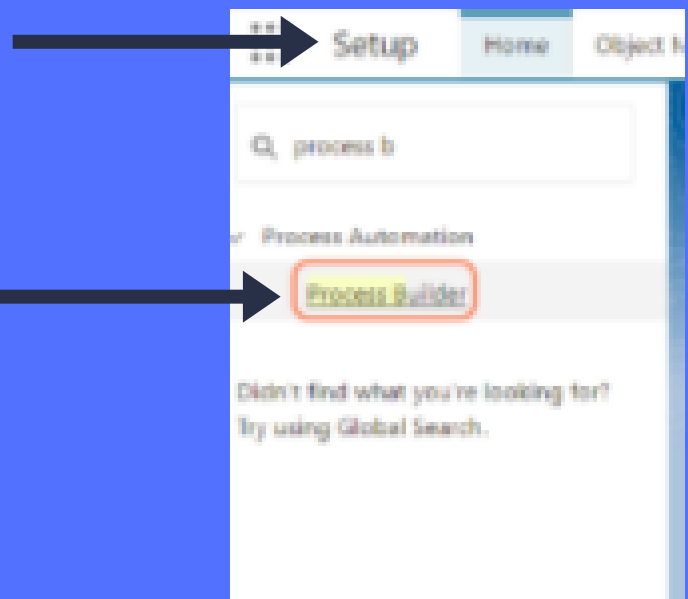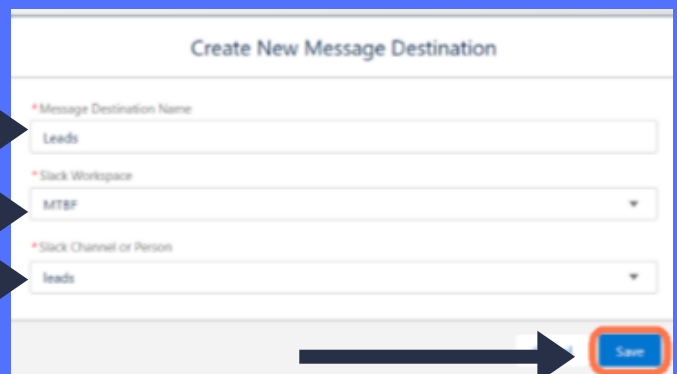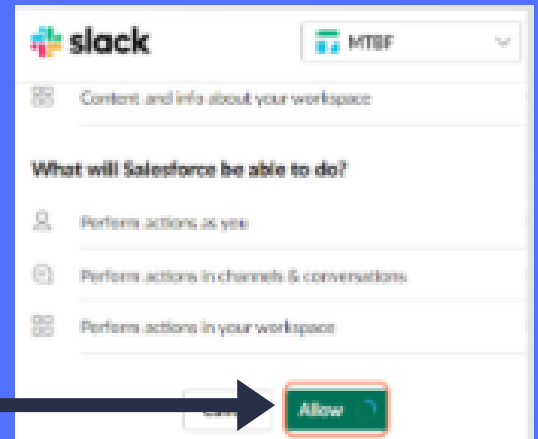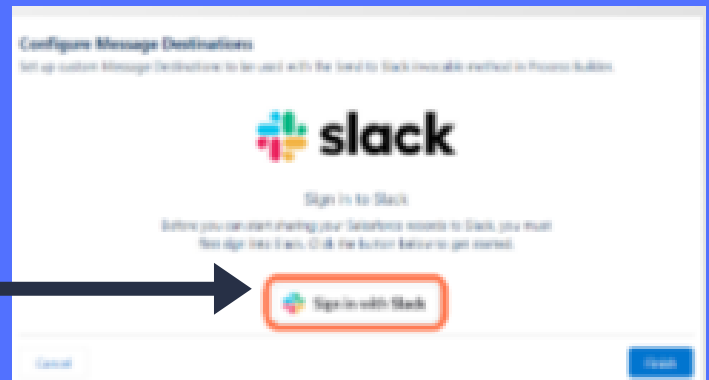# HOW TO GUIDE: SLACK INTEGRATION WITH SALESFORCE

STEP 5

Process Builder

➤ **Return to "Slack Setup" and press continue. Next select, "Sign In With Slack"**

➤ **Select Allow on this screen**

➤ **Now, select "New Message Destination". Enter the criteria and click the "save" button**
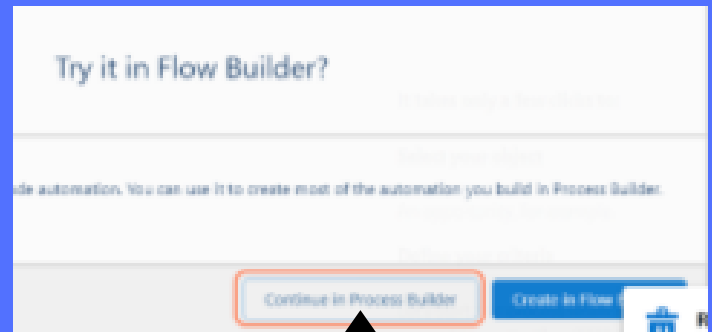

➤ **Go to the Setup menu and enter/select "Process Builder" in the search bar**
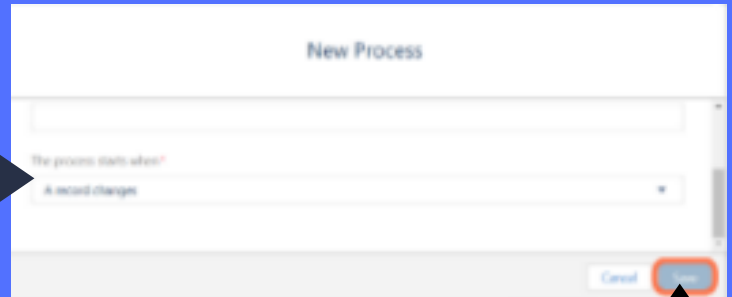
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CONTINUING STEP 5

➤ Select new, and click "Continue in Process Builder"

Try it in Flow Builder?

➤ Next, select a "name" and then "choose when the process will begin". Then click "save"

New Process

➤ Click "Add Object", then select the "object" that you would like to add and when to start the process. Lastly, click "save"

Choose Object and Specify When

➤ Next, click "Add Criteria", then enter the "criteria name" and "criteria for execution". Lastly, click "save"

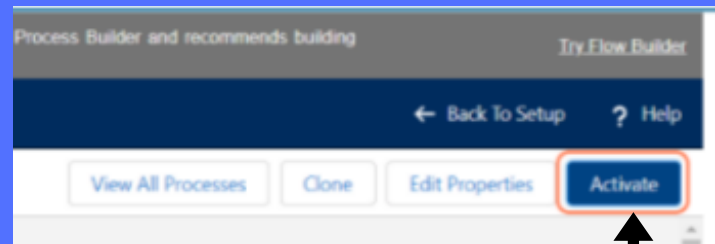Define Criteria for this Action Group
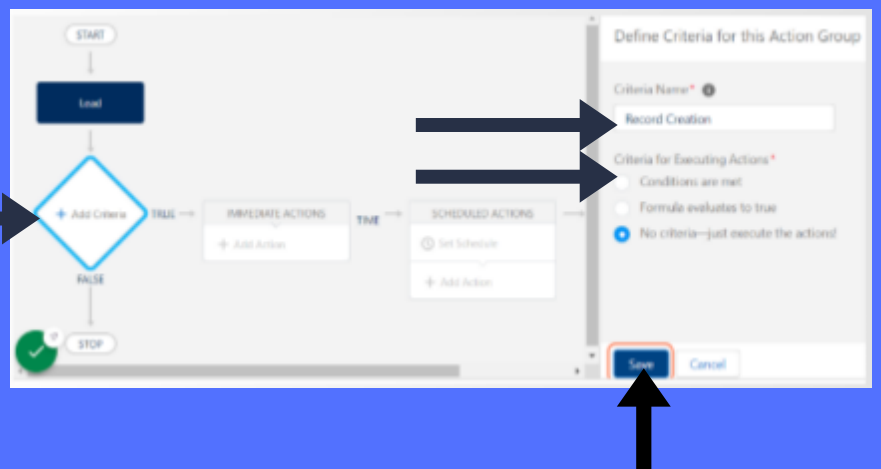
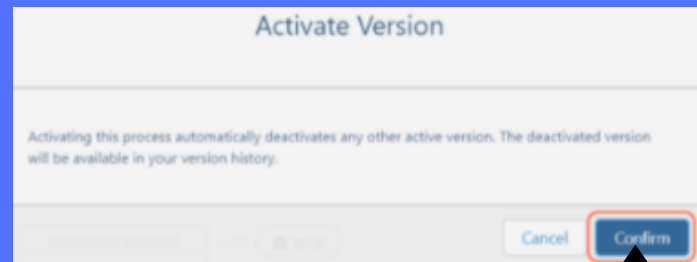# HOW TO GUIDE: SLACK INTEGRATION WITH SALESFORCE

CONTINUING STEP 5

➤ Click "Add Action", then enter the "action type, name and class". Next, we need to Set the Apex Variables (paste message destination ID from the automation config. page) Lastly, click "save"
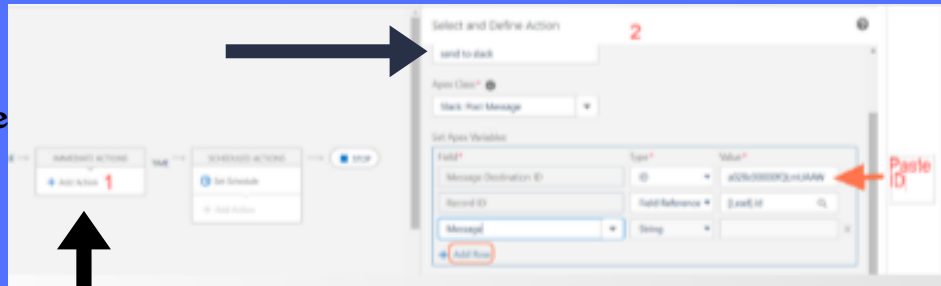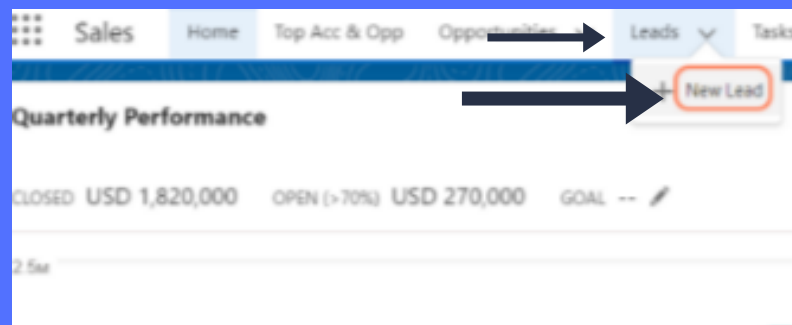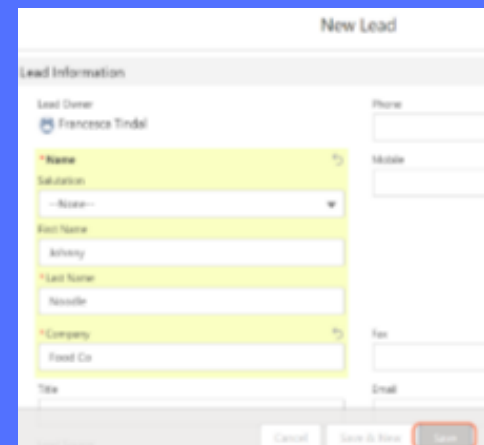
➤ Click Activate

➤ Lastly, Click Confirm

STEP 6
Test Slack Automation

➤ Go to the "Sales Application" and select the "Leads" tab and "Create a new lead"

➤ Next, enter the required fields and select "save"

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CONTINUING STEP 6

➤ **Finally, go to Slack and you should find a "New Lead Message"**

Message: There's a new lead in Salesforce!
Manage alerts