

Salesforce & Slack intergration Project



Susan Koudou

SALESFORCE & SLACK INTERGRATION

Benefits of using Slack with Saleforce

Both Salesforce and Slack are effective business tools on their own. Combining the two creates the world's No. 1 CRM, with the integration of both apps and analytics platform with the world's most communications platform unlocks all sorts of new business-driving capabilities.





integrating Salesforce and Slack



Step 3:

Open up slack and add Salesforce as an app,





Step 1

Install Salesforce by clicking the Add to Slack button

Step 2 Install the companion app from Salesforce AppExchange

Step 3 Connect your Salesforce account in Slack







Step 4& 5: Permission set.

Step 4. Open Salesforce , enter permission set in set up and click select

This allows users to gain acess to intergrade both Salesforce and Slack

Setup Home Object	Manager 🗸			
Q permission	SETUP Permission		//////////////////////////////////////	//////////////////////////////////////
✓ Users	Permission			
Permission Set Groups	Assignment Summary			
Permission Sets	Slack Service Use	r		Help for this Page 🥹
✓ Custom Code	Permission set Slack	Service User has been assigned to 1 user.		
Custom Permissions		Done		
Didn't find what you're looking for?	Full Name	Username	User License	Message
Try using Global Search.	Susan Koudou	skoudou4@brave-koala-vckto0.com	Salesforce	Success
		Done		

Step 5. choose Sales user and selecting my name as user.





CC NNNNN - HIII		
sion Set	s	
User		Help for this Page 🥹
		Add Assignments Remove Assignments
+	Alias	Username Role Active Profile Expires On
usan	SKoud	skoudou4@brave-koala-vckto0.com 🗸 System Administrator
		Add Assignments Remove Assignments



Step 6: Checking your "TO DO"





Step 6: Open up slack cloud for slack & make sure all of these check points are set up.

is and User Assignments is to users who need access to Salesforce Slack	View Slack Permissions	ies >
alesforce to view and edit records in Slack.	Go to Users	
op Directory to your Slack workspace.	Go to Slack App Directory	
eature Setup les Cloud for Slack.		
n Access in Slack (Optional)		3

Step 7 & 8: Create alerts for Slack



Purpose: For team to be alerted on important informartion only, such as hot lead alerts for sales team members or new case alerts for customer service, so they only get the information that's important to them.



Step 7: Go into Salesforce Set up and enter alert

Step 8: Next, Enter "email alerts":

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Help for this Page 🤣
sses. When changing an email alert, any modifications will apply to all rules, approvals, or
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Step 9: Creating a channel for Salesforce updates

Step 9: Go into Slack and click on " add channel"



Step 10: Create the channel and give it a name



Purpose : Creating a Channel for your company use and any salesforce updates



Step 11: Open Salesforce and go in to leads.



12.Create a new lead and add your name as well as your companys name

Home Opp	Edit Jo	hnny Noodle	rts ∨ More ▼
ohnny Noodl€	Lead Owner 👸 Susan Koudou	Phone	t Edit New Case 🔻
Company Food co	• Name Salutation	Mobile	
n - Not Contacted	Ms. 💌		✓ Mark Status as Complete
Details	Johnny *Last Name		
New Task	Company Find an	Fax	tential duplicates of this
	Food co	Email	ivated. Activate duplicate rules
	Lead Source	Website	ate records.
& Overdue	None	*Lead Status	vry (0)
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Checking your success:



This is how it should appear in slack

Final Step: Testing automation

Here's how you can check if your on the right track:

13.Open Slack



14.Launch the Slack app

n: slack	
Do you want to allow this page to open "Slack"?	
Launching step	
Click " Open Slack " to launch the desk Not working? You can also <mark>use Slack in y</mark> o	





15.In the bottom corner, Make sure Salesforce is listed under "Apps"





16.Go to your Slack channel and you will be able to see the lead that you've just created, which has created automatically messages in the channel.

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Salesforce ~			
ne Messages About			
LOOK TOT INTO ADOUL YOUR CUSTOMERS WITHOUT NAVINE TO LEAVE STACK.			
Get Started Wednesday, October 5th ~			
Today ~			- New
loudy	Gt React	(=) Reply	:
Salesforce APP 11:23 PM	Oncact	Chicphy	•
Welcome to Salesforce!			
We're here to help you stay up to date on your customers by bringing the info	you care		
about from Salesforce into your Slack channels.			
Get Alerts			
You can set up and receive custom alerts for when important changes happen	to your		
You can set up and receive custom alerts for when important changes happen to customer records.	to your		
customer records.	to your		
customer records. Stay current on conversations			
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