

## Salesforce & Slack intergration Project





## SALESFORCE & SLACK INTERGRATION

### **Benefits of using Slack with Salesforce**

*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.*

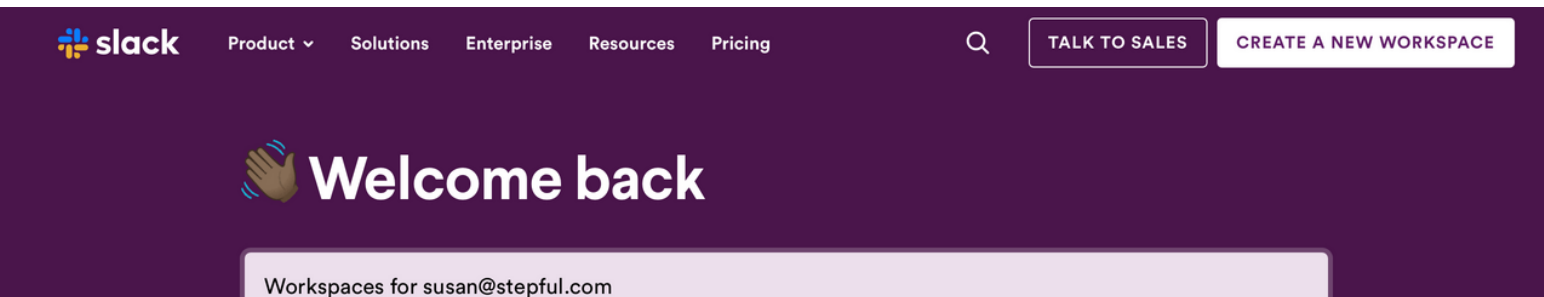
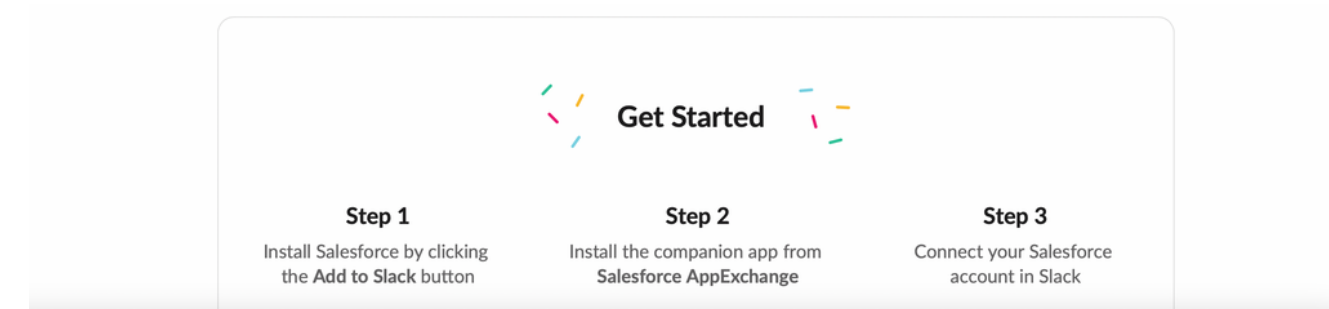
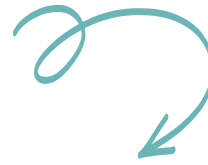




# integrating Salesforce and Slack

Step 1:

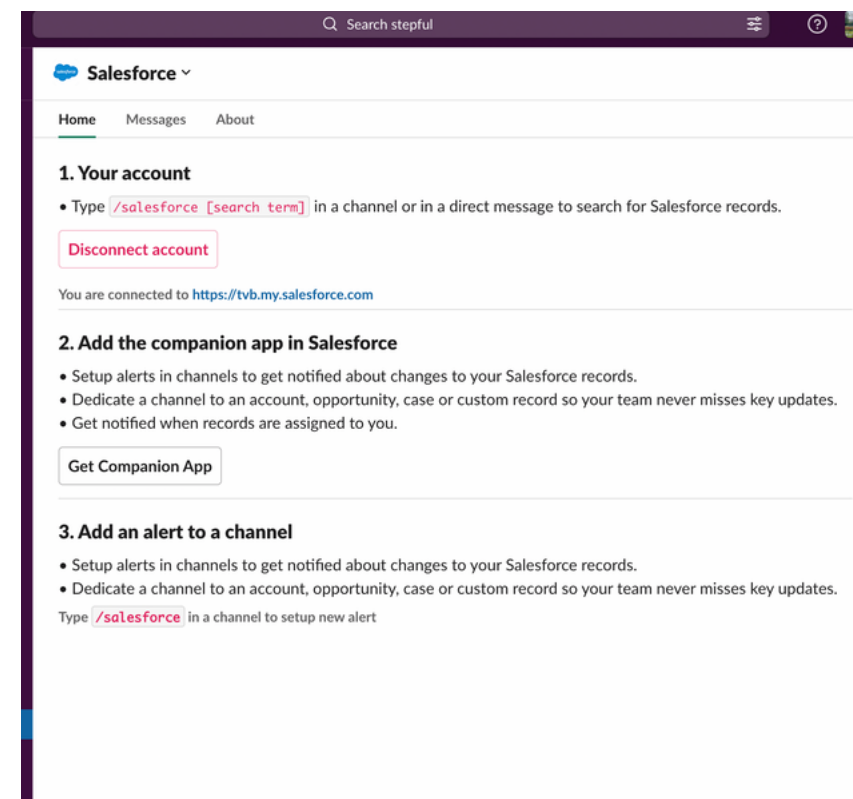
Go to  
<https://slack.com/>  
and download it

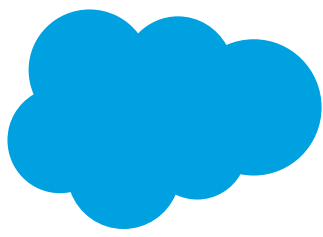


Step 2: Create an account

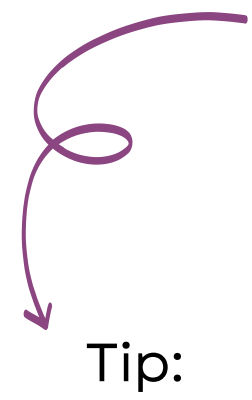
Step 3:

Open up slack and add Salesforce as an app,





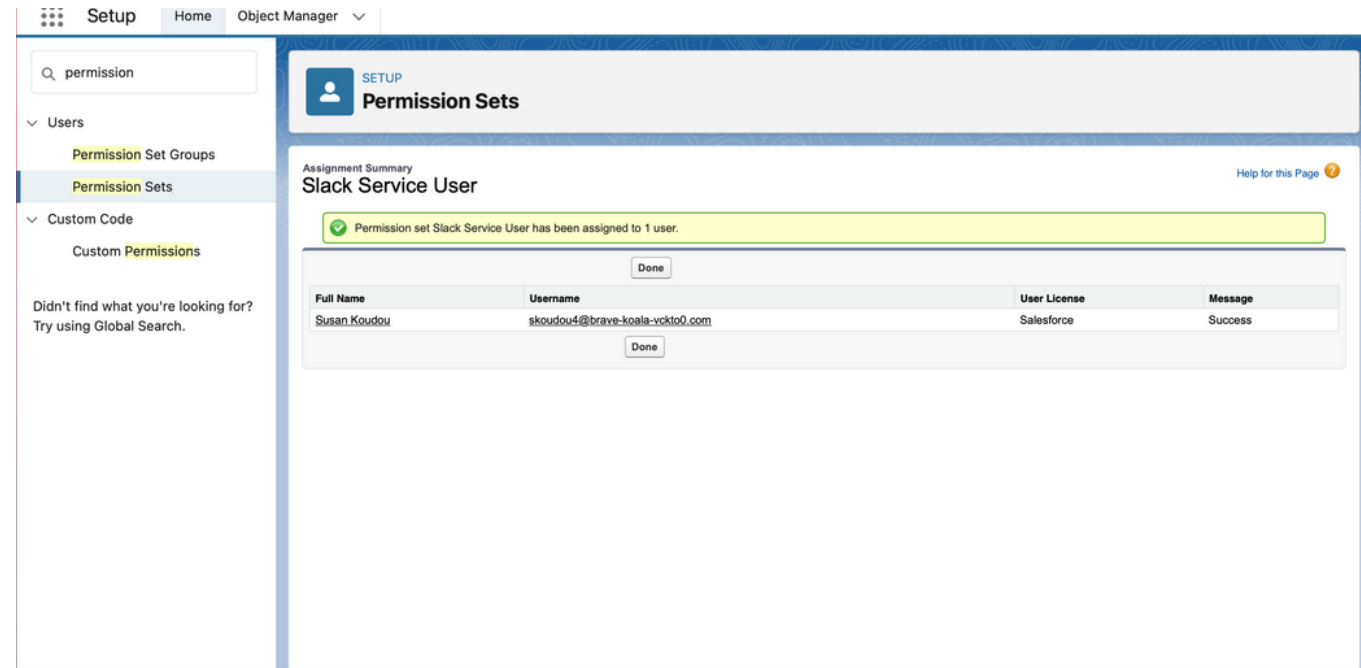
# Step 4& 5 : Permission set.



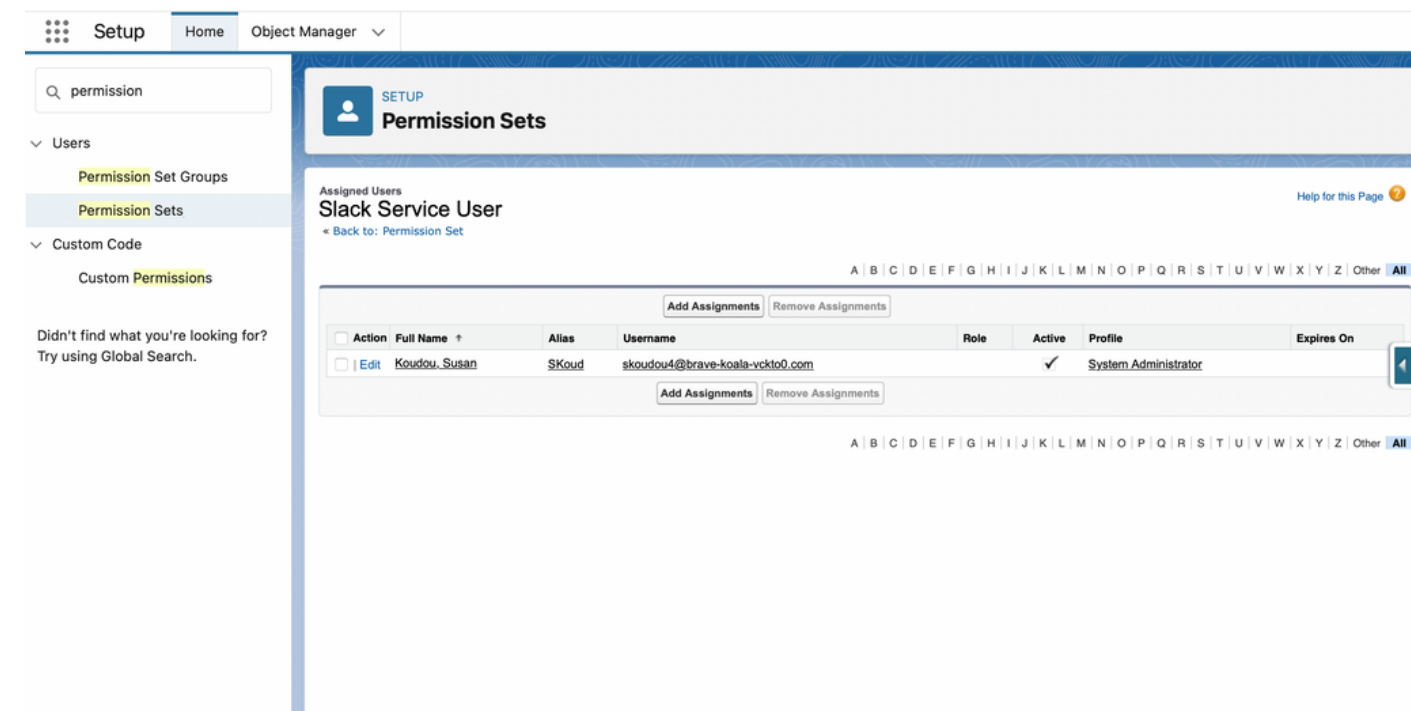
Tip:

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

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

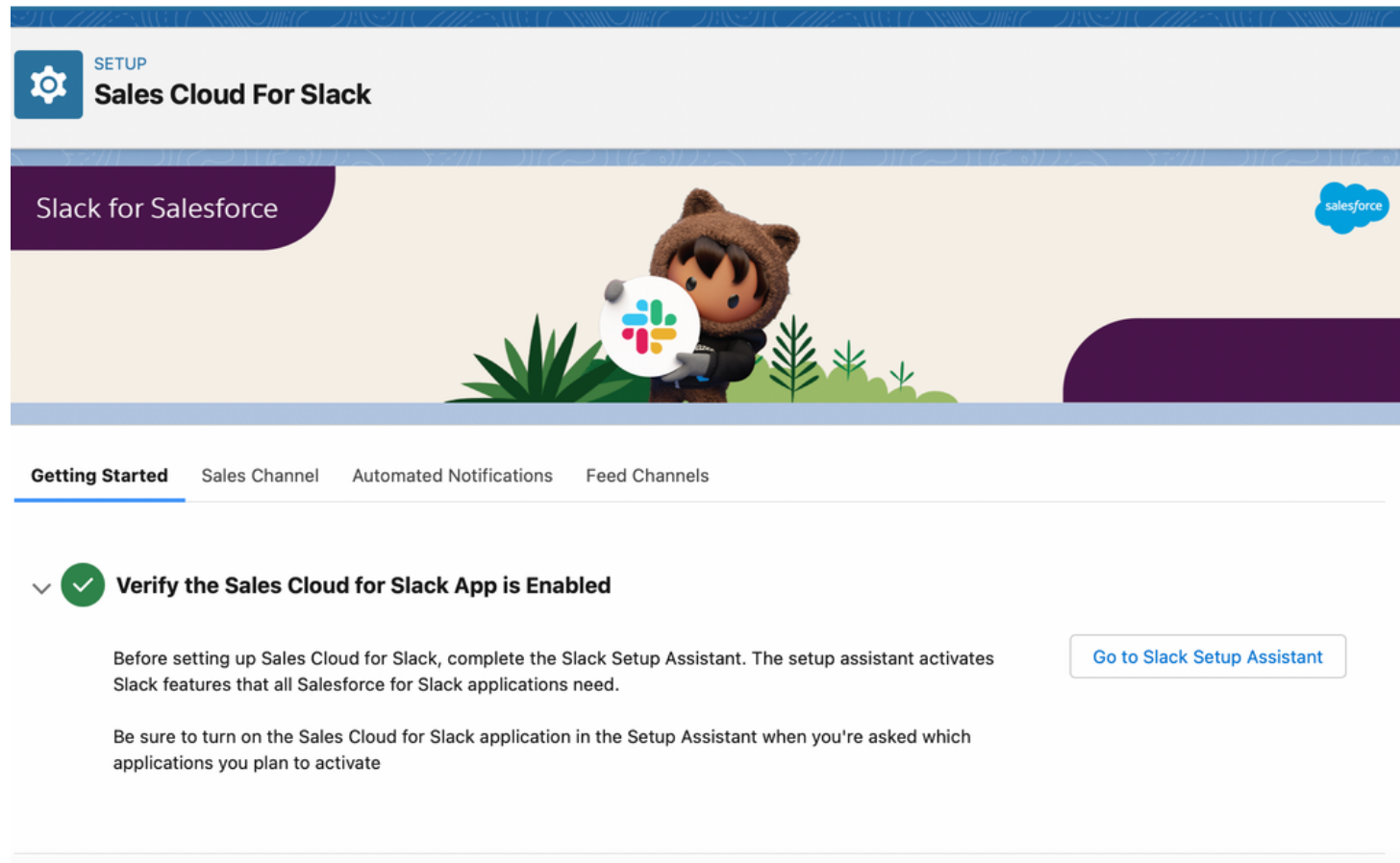


Step 5. choose Sales user and selecting my name as user.

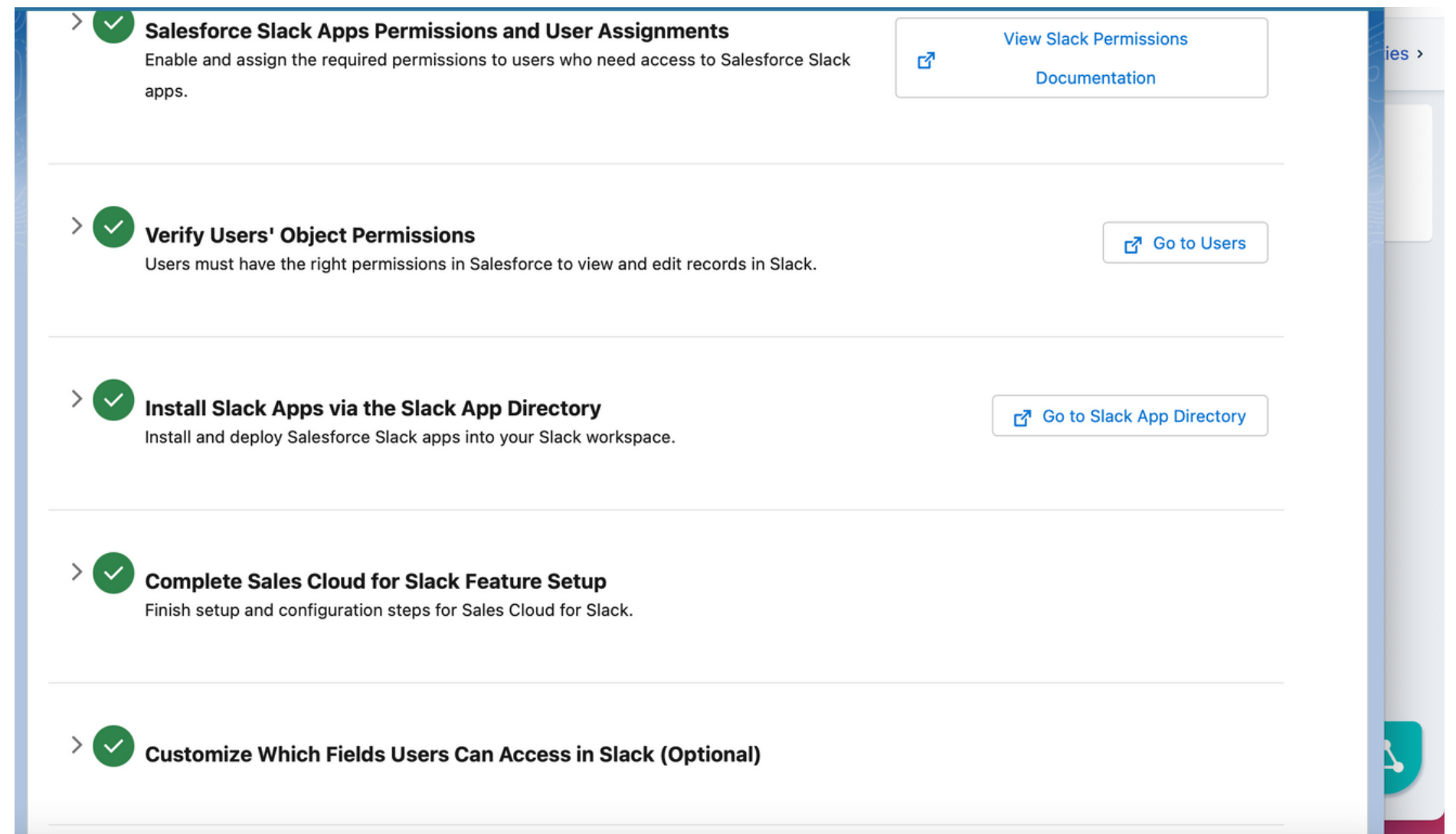




# Step 6: Checking your "TO DO" list



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

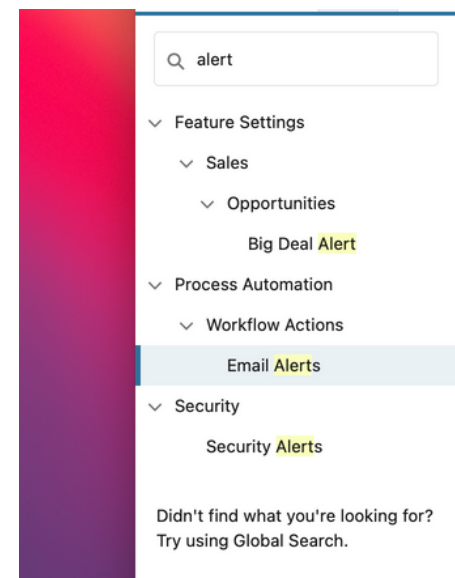


## Step 7 & 8: Create alerts for Slack

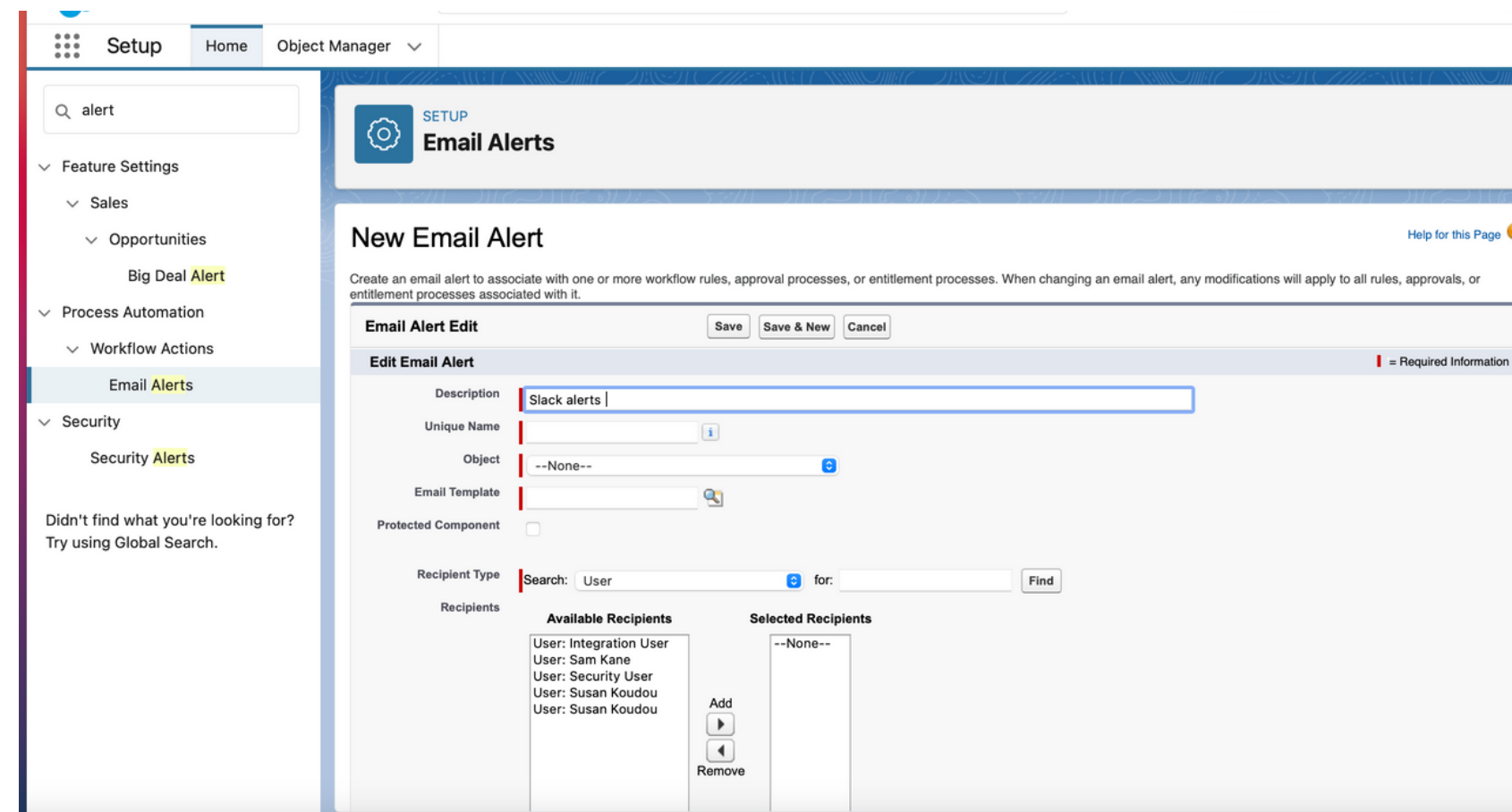


**Purpose:** For team to be alerted on important information only, such as hot lead alerts for sales team members or new case alerts for customer service, so they only get the information that's important to them.

Step 7: Go into Salesforce Set up and enter alert



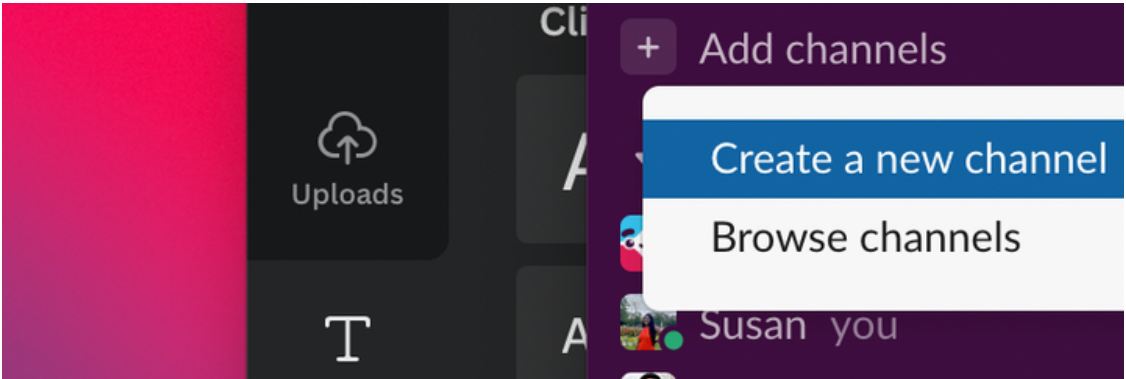
Step 8: Next, Enter "email alerts":



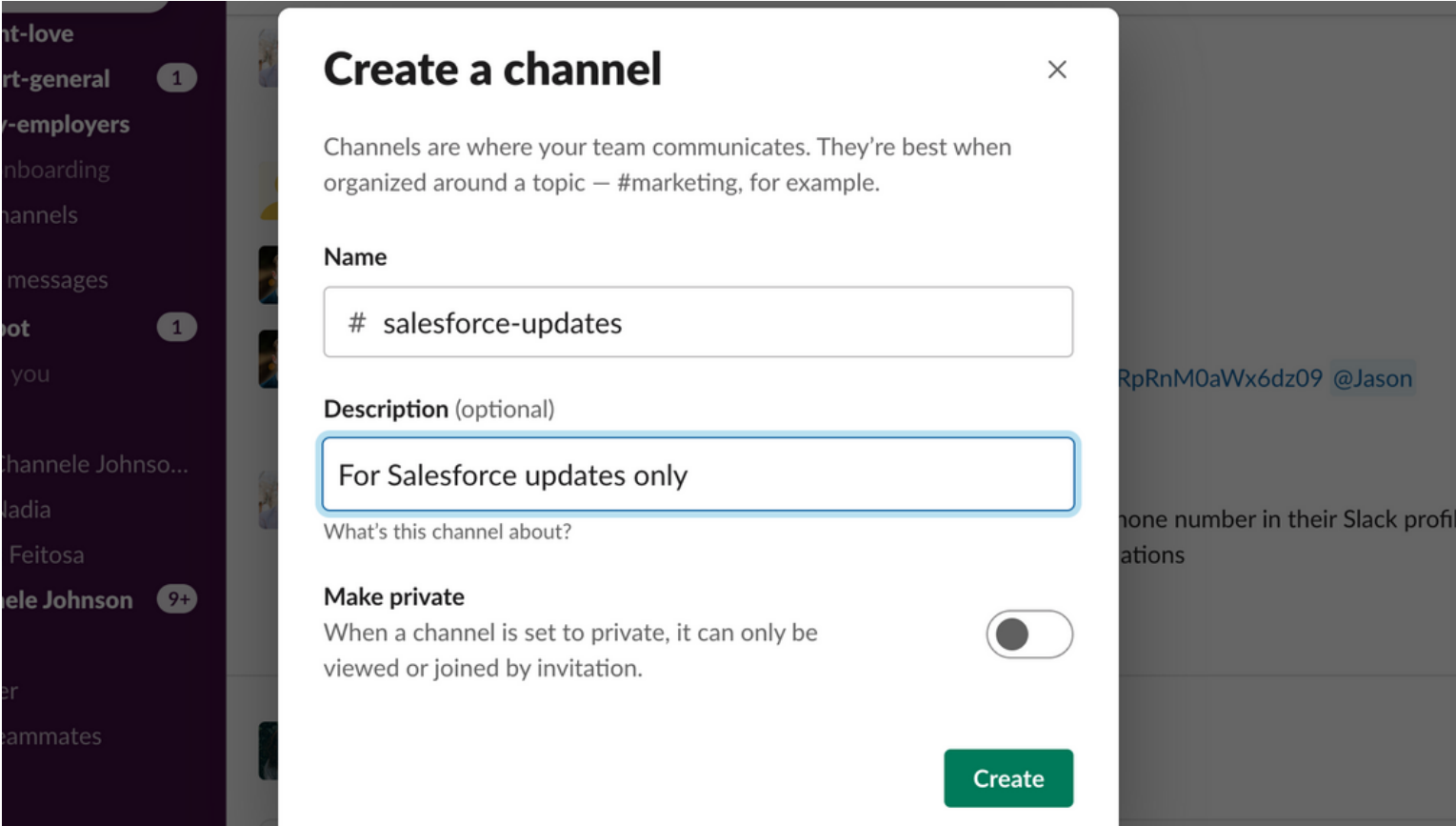
Purpose : Creating a Channel for your company use and any salesforce updates

## 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

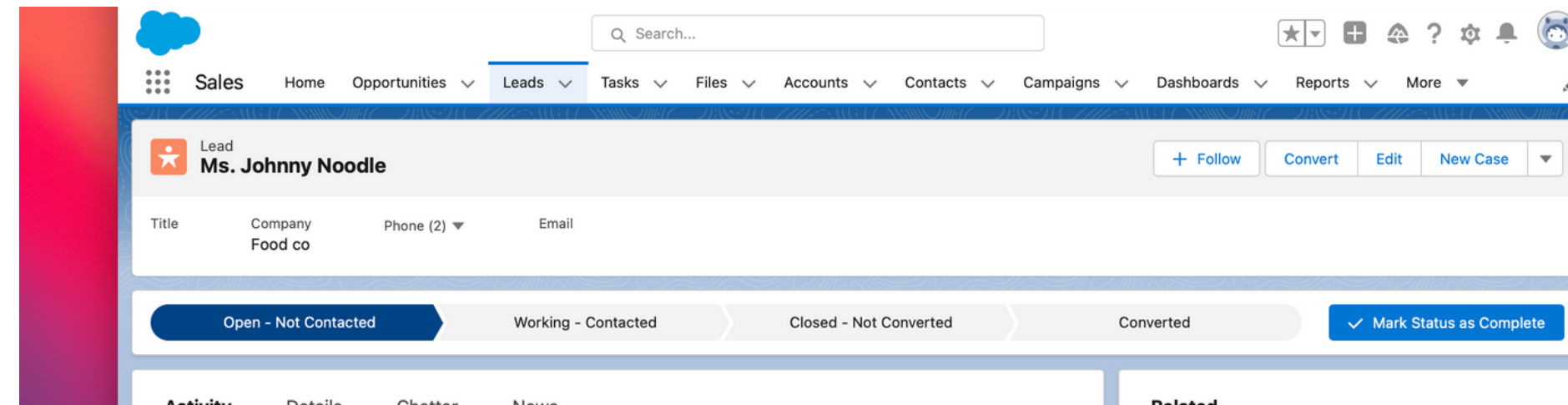




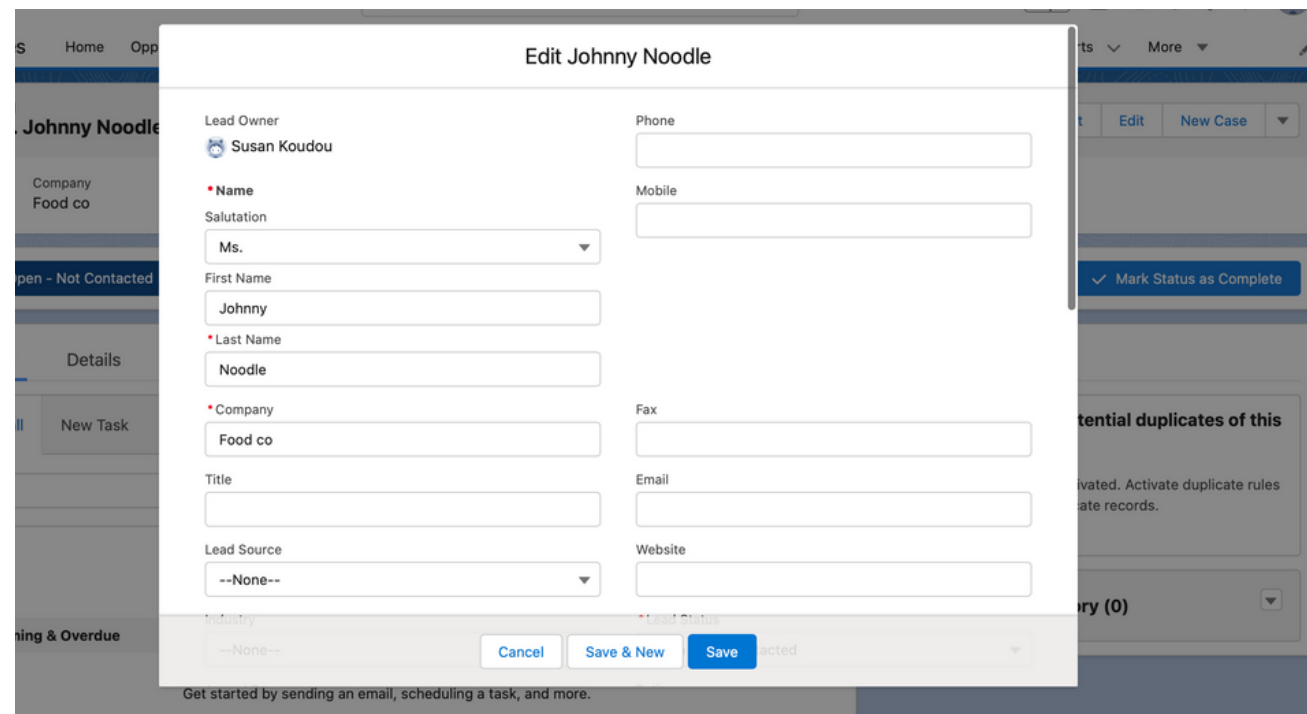
# Step 11 & 12 : Creating leads



Step 11: Open Salesforce and go in to leads.

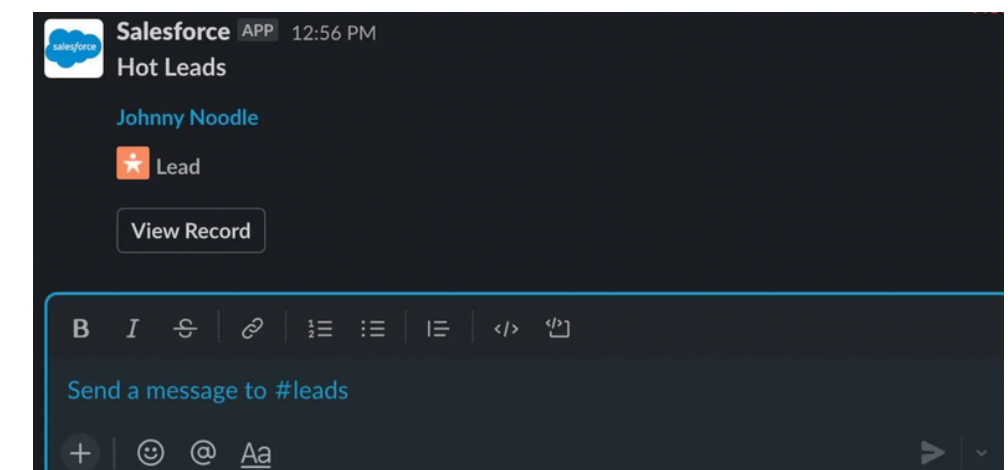


12. Create a new lead and add your name as well as your company's name



Checking your success:

This is how it should appear in slack



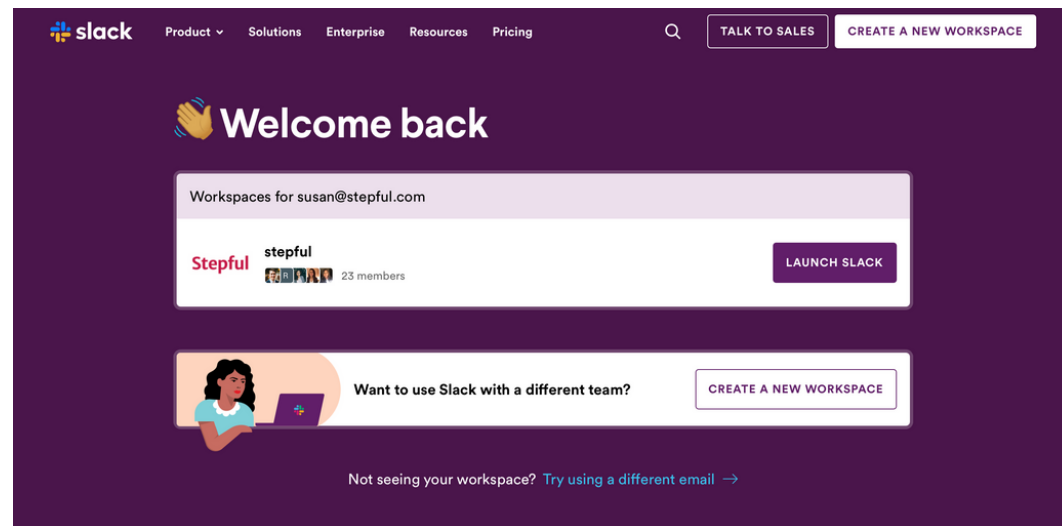


# Final Step: Testing automation

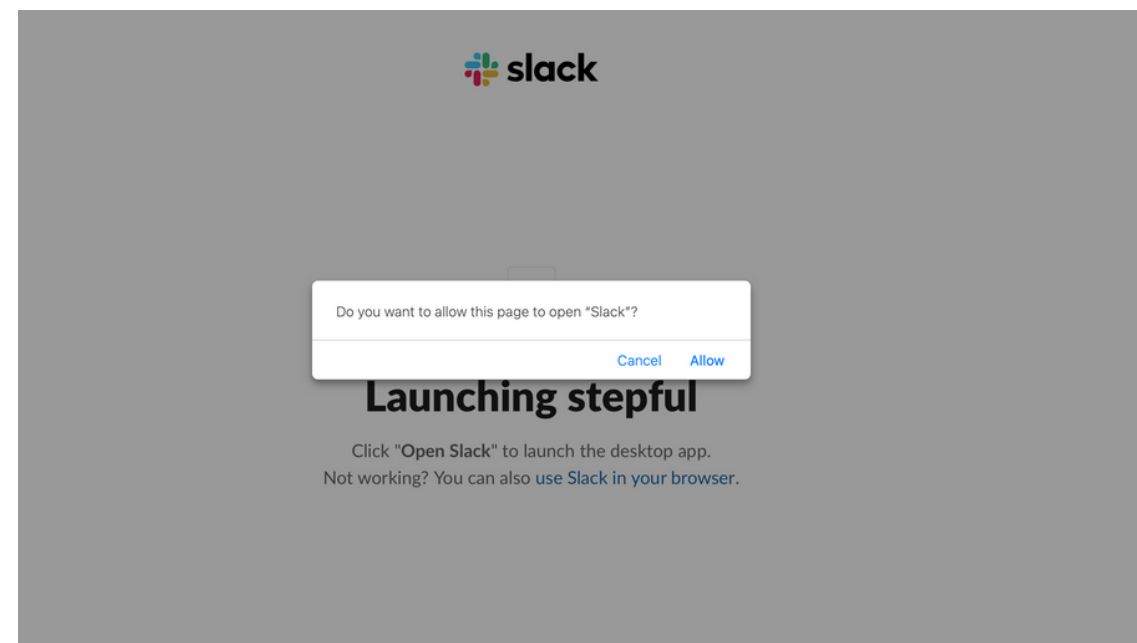


Here's how you can check if your on the right track:

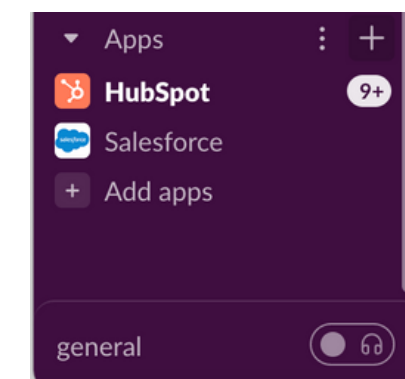
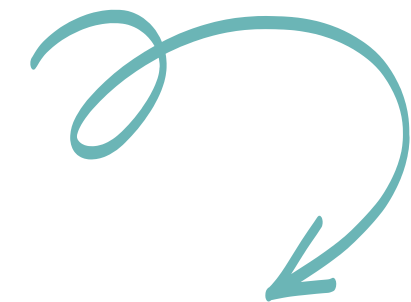
## 13. Open Slack



## 14. Launch the Slack app



## 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.

