Implementation Guide

Salesforce in Slack

Overview

This guide provides a detailed walkthrough of the steps required to configure and implement the Salesforce App within Slack, as well as information about how to approach integrating Salesforce and Slack generally. The primary audiences for the guide are Slack Admins and Salesforce Admins, who must collaborate on the steps below.

How it Works

Connection Between Slack and Salesforce

In this guide, we will start by configuring the connection between your Salesforce org(s) and your Slack instance. This is a one-time setup that requires both Slack and Salesforce administrators to collaborate. This process automatically provisions a Salesforce platform integration user to facilitate data exchange between the platforms. The system also supports connecting multiple Salesforce orgs to Slack. This connection is the foundation for features that integrate Slack and Salesforce, such as the Salesforce App, Agentforce in Slack, Salesforce Channels, the Salesforce Workflow Builder Connector Steps and the Slack Flow Core Actions.

User Authentication and Authorization

Salesforce-to-Slack User Mapping

Each Slack user ***is mapped to their corresponding Salesforce user*** so that the system can ensure they only see Salesforce data they have permission to access. Object, record and field-level security from the connected Salesforce org are mirrored in Slack. If automatic account mapping is enabled (details below), authentication happens transparently–when users interact with Salesforce data in Slack, they're automatically authenticated against their Salesforce user record, maintaining security while eliminating the friction of a manual login.

Record Sharing

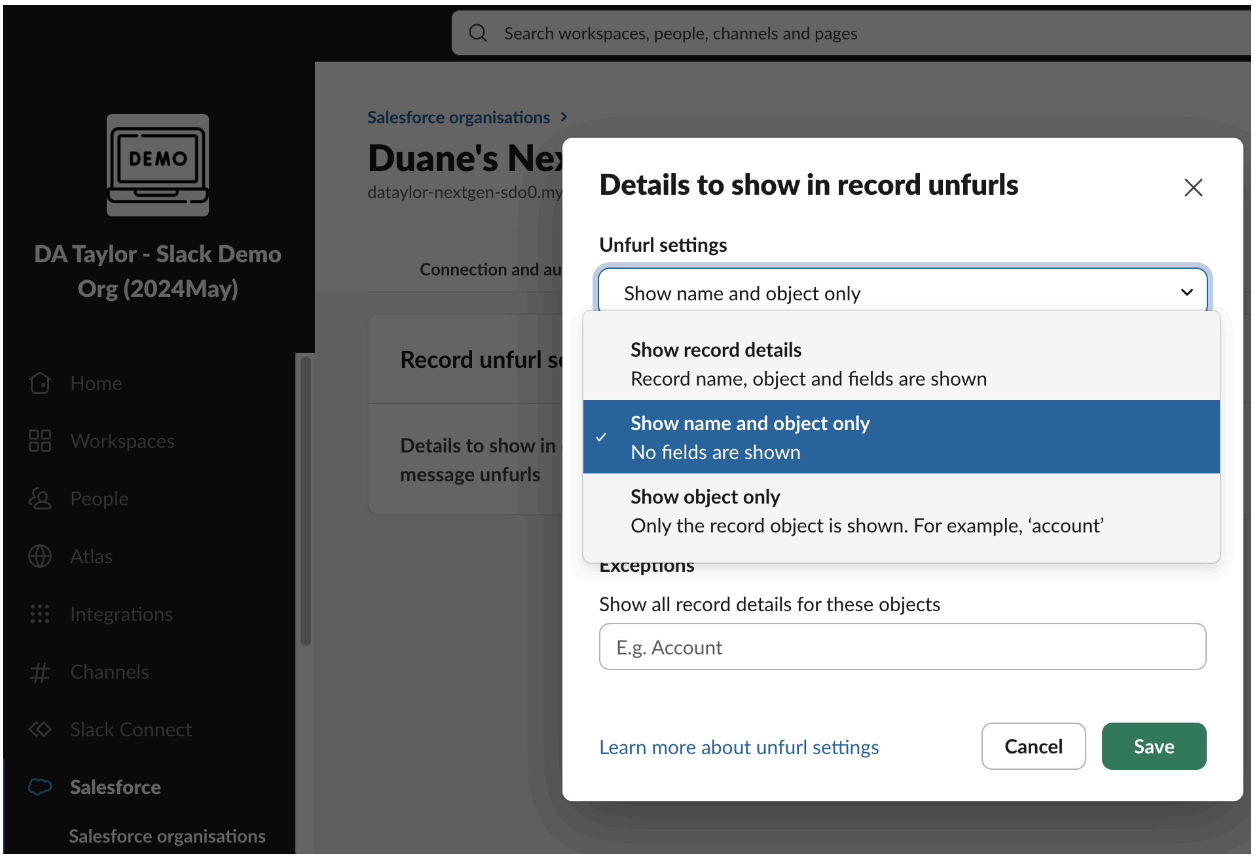
When someone shares a Salesforce record link in Slack, the record preview (unfurl) is **generated using the sharer's permissions** - showing only the fields and data they can see in Salesforce. Everyone in that Slack conversation can then view this same preview.

Slack admins can configure unfurl settings at the org level to control potential undesired data exposure:

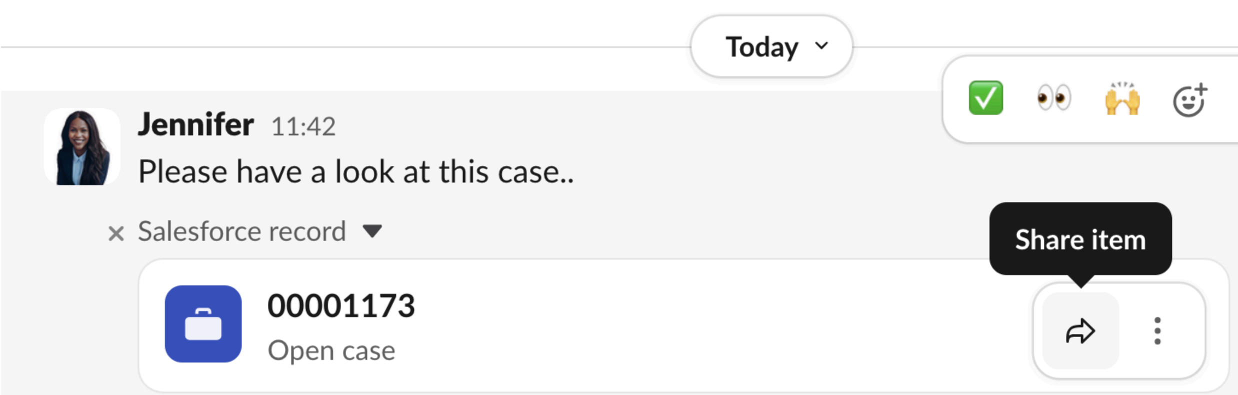
- Show record details - Display record name, object name, and selected fields
- Show name and object only - Just the record name and object name (no field data)
- Show object only - Only the object name (e.g., "Account", "Opportunity")

These settings are configured at the org level for all objects, with the ability to create exceptions for specific Salesforce object types, giving you granular control over what information appears in record previews across your organization. This ensures teams get the context they need while maintaining your data security requirements.

Configure record unfurl in the Slack Admin dashboard



Example of a record unfurl using name and object only



List View Sharing

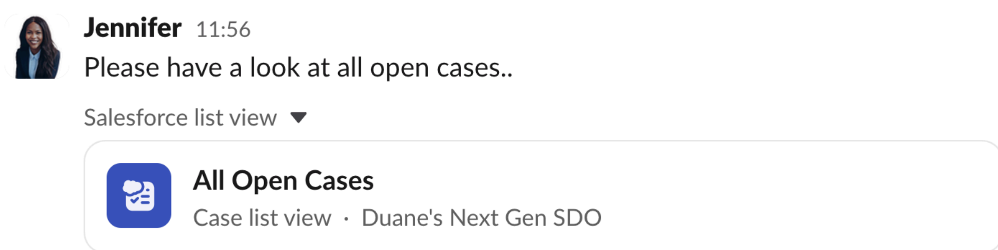
List view sharing uses the unfurl configurations to control what is shown. More specifically:

- **Admin unfurl configurations control visibility**: if the unfurl configuration is set to show details/names, the list view name appears. If set to object-only, you'll see generic text like "Opportunity list view"
- Only the name of the list view appears in the unfurl (never actual record details inside it)

Visibility

- All Slack users can see the unfurl card regardless of their Salesforce permissions
- When users click the unfurl:
  - If not authenticated: they'll see a prompt to sign in to Salesforce
  - If authenticated but lack access: they'll see a message explaining they don't have permission to view this list view

Example of a list view unfurl when record unfurl is configured for name and object only



Users Without Salesforce Licenses

Users without Salesforce licenses can participate in Slack conversations, but won't have access to Salesforce-powered features. Think of it like having a keycard to the building but not to specific secure rooms - they're part of the conversation but can't interact with Salesforce data or workflows that implement Salesforce-related automations.

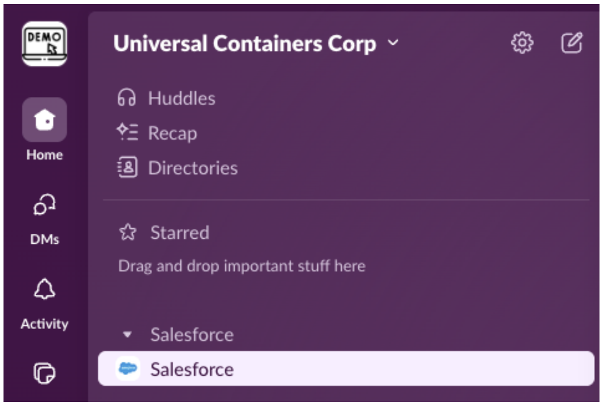
What Non-Licensed Users Can Do

- Join Slack channels and participate in general discussions
- See messages and collaborate on non-Salesforce topics

What Non-Licensed Users Cannot Do

- View or interact with Salesforce records shared in channels
- Use the Salesforce App
- Receive Salesforce notifications or alerts
- Participate in Salesforce-driven workflows or approvals
- Use any Salesforce-Slack apps or automations that require Salesforce data access

The Salesforce App



The Salesforce app requires no additional configuration. The app will automatically appear in the sidebar for users if they are connected via ***automatic user authentication and if they have access to Salesforce list views***.

Users can view and interact with Salesforce record lists (e.g. "My Open Opportunities" or "This Quarter's Deals") directly in Slack.

Important Note:
As noted above, when automatic user mapping is enabled, users with Salesforce accounts will potentially *immediately* see the Salesforce app in their sidebar, and be able to see list views and create/update Salesforce records. You will likely want to plan for and think about how users can best integrate the Salesforce app into their existing workflows and tasks and proactively train users on how to best use this feature, as well as other Salesforce integration features you may choose to implement.

Eligibility & Licensing

Overview

Salesforce integration capabilities in Slack vary based on your Slack plan tier. All features require Salesforce licenses that give users access to the objects they need to work with in Slack.

Core Integration (Available on All Slack Plans)

The foundational Salesforce in Slack experience includes:

- **Salesforce App**: Native Slack app with built-in Flow actions
- **Record Management**: View, edit, and search Salesforce records directly in Slack
- **Record Unfurls**: Automatic previews when Salesforce record links are shared
- **Salesforce Channels**: Dedicated channels synced with Salesforce records
  - Free plans: 90-day message history
  - Paid plans: Unlimited message history

- **Related Lists & Sidebar**: Access Salesforce data within Slack's interface

Enhanced Capabilities (Requires Paid Slack Plan - Slack Pro, Business+, or Enterprise+)

- **Multi-Org Support**: Connect multiple Salesforce orgs to your Slack workspace
- **Unlimited Channel History**: Full message retention in Salesforce Channels

Advanced Features (Requires Business+ or Enterprise+)

- **Record Change Automation**: Trigger workflows when Salesforce records are updated
- **Scheduled Automation:** Run workflows on a time-based schedule
- **Salesforce Standalone Lists**: Work with Salesforce list views independently in Slack (Business+ or higher)
- **Manual Workflow Triggers**: Send data to the Salesforce app on-demand
- **AI Channel Summaries:** AI-powered summaries of Salesforce Channel activity

Connect Slack and Salesforce

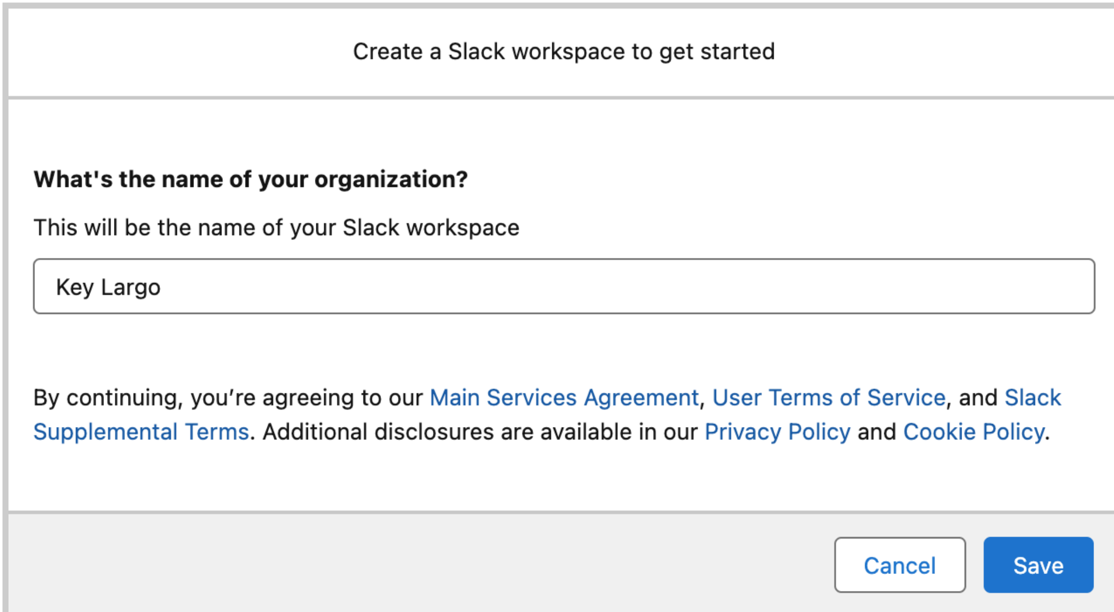
The steps in this section are the only required steps in the process. Additional steps can (and should) be taken to ensure end users have the experience that best fits your teams' needs, which will be covered later.

Create a new Slack workspace for your team

If you don't already use Slack, follow these steps to instantly create a Slack workspace that is connected to your Salesforce environment. If you already have a Slack workspace or Enterprise Grid organization, skip ahead to the next section to connect your existing workspace to Salesforce.

In Salesforce:

1. Click the **Setup icon**.
2. In the Quick Find box, search for and select **Slack Guided Setup**.
3. Select "**Get Started**"
4. Under *Create a Slack account*, click **Get Started**.
5. Enter a name for your Slack workspace, then click **Save**.



Your new Slack workspace will be automatically connected to your Salesforce environment. By default, Slack will map user accounts based on **email** addresses. If you prefer to map based on **Federation ID**, you can set up the connection manually via the *Manage Slack Connection* page (instructions in the next section). You'll receive an email with instructions on how to log in if you'd like to explore your Slack workspace.

Connect an existing workspace

If you have a pre-existing Slack workspace, you can connect it to Salesforce. If you are using Slack Enterprise Grid, you will need to connect your Salesforce org to the Slack "org" (not an individual workspace).

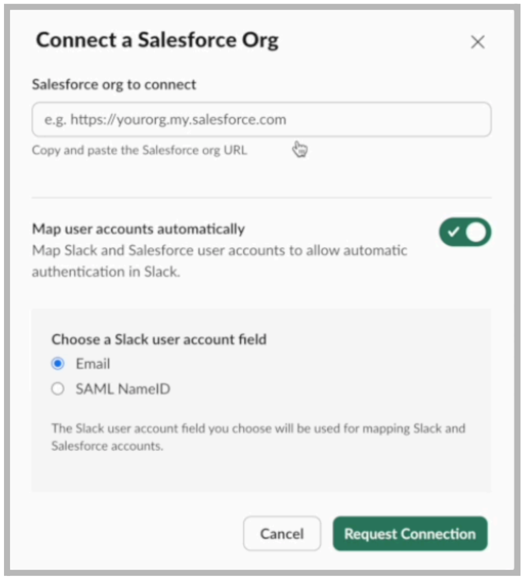
To do this, you'll need the following permissions:

- In Salesforce, you'll need to be a system administrator
- In Slack, you'll need to be a **Workspace Owner/Admin** (Pro and Business+), **Org Owner/Admin** (Enterprise Grid), or a **member** with the "Salesforce Admin" system role

First, initiate the connection process in Slack:

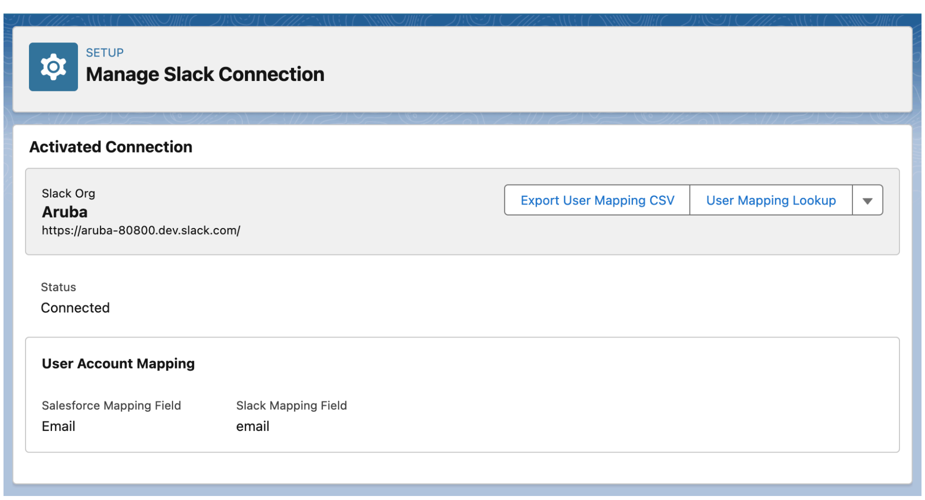
1. In Slack, navigate to the *Salesforce organizations* page in the admin console (Click your **workspace name** in Slack> **Tools & Settings** > **Manage Salesforce organizations**)
2. Select **Connect Salesforce Org**
3. Enter in the URL for your Salesforce environment
4. Select the field that you'd like to use to match up user accounts between Slack and Salesforce. For many customers, this is simply the **email** field

5. Select **Request Connection**



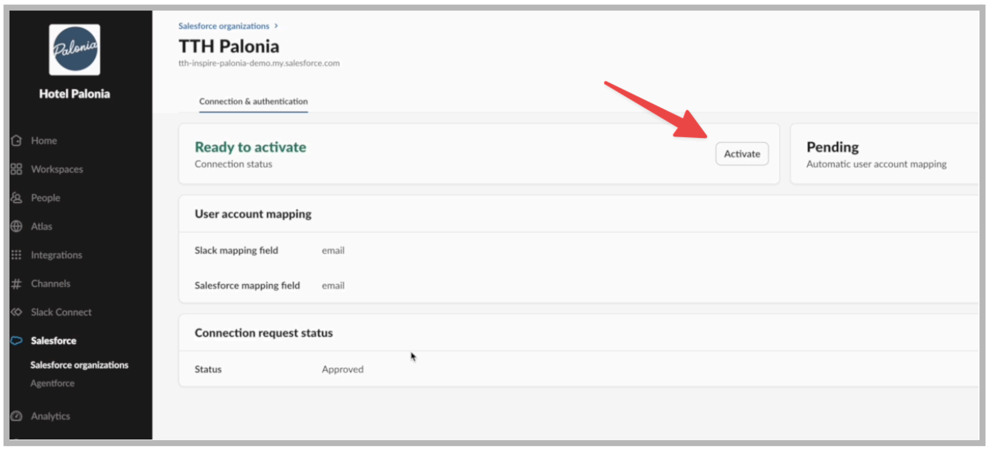
Next, accept the connection request in Salesforce:

1. In Salesforce, select Setup.
2. In the Quick Find box, search for and select **Manage Slack Connections**
3. Select the *Salesforce Mapping Field* that you'd like to use to match Slack and Salesforce user accounts.
4. Agree to the Terms & Conditions
5. Click **Approve**
    a. For information on the *Export User Mapping CSV* and *User Mapping Lookup* buttons, see this Slack Help Center page.



Lastly, activate the connection in Slack:

1. In Slack, navigate to the *Salesforce organizations* page in the admin console
2. Select the Salesforce organization that you connected
3. Click **Activate**
4. In the modal, confirm that you are ready to **Activate** your connection



If you want to connect additional Salesforce orgs, you can simply follow the steps above for each org, starting from the Salesforce organizations page in the admin console, entering the Salesforce org URL and initiating the request.

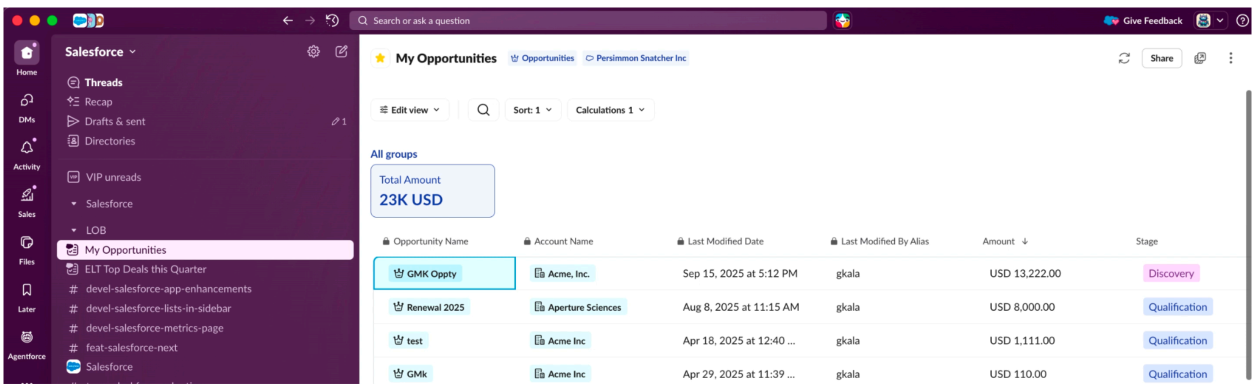
Important Note:

If, due to technical constraints, you are unable to use automatic user mapping and you disable ***Map user accounts automatically***, all users will need to manually authenticate to connect their accounts before they can access Salesforce features in Slack, including the Salesforce App. If at all possible, we recommend enabling **Map user accounts automatically** and using email address as the mapping field, ensuring email addresses are consistent between both systems. If you cannot use email, then consider using Federation ID (note: this requires SSO configuration - see this Trailhead for more information).

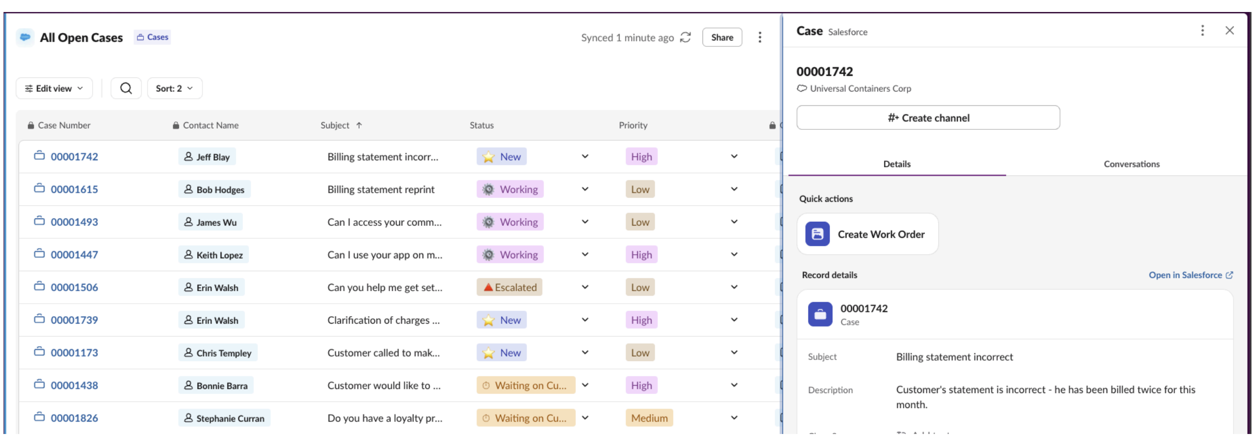
The system will attempt to map your users with the selected mapping field. If the values in those fields match between Slack and Salesforce, we will store the user's mapping. The next time this user loads the Slack client or attempts to access Salesforce data, they will be automatically authenticated into their Salesforce account and they will see their Salesforce data in Slack.

The Salesforce App

As mentioned earlier, while you as an admin do not have to explicitly configure the Salesforce App, it is important to understand that the value of the app is that it brings Salesforce natively into Slack and allows users to browse and discover available list views within the Salesforce app, then add the ones they use most frequently directly to their Slack sidebar. These list views can be moved around just like Slack channels - [users can drag and drop them within the sidebar and organize them alongside their existing channels and direct messages](). Users can edit records inline within a list view just like in Salesforce, and with a single click on any record in a list view, users can access their Salesforce records without leaving Slack, and they can remove list views from their sidebar at any time if they're no longer needed. Admins and developers can build Slack Workflows or Salesforce Flows that send notifications and messages to Slack users via the Messages tab of the Salesforce App.



An Opportunity List View docked in the Sidebar



Record Detail when clicking on a record in a List View

Slack admins should work closely with their Salesforce administrators and business teams to **determine the optimal configuration for their users**. This collaboration might include creating [Slack-specific record layouts]() and/or [Slack-specific unfurl layouts]() that are optimized for the Slack user experience, identifying which objects and fields are most valuable to surface in Slack, and ensuring the available list views align with how teams actually work with Salesforce data.

Develop An Implementation Plan

With Salesforce and Slack offering multiple integrations–from the enhanced Salesforce app and Salesforce Channels to Agentforce in Slack and automation through Flows and Workflow Builder–the key to success is **intentionally determining which capabilities align with your teams' needs and orchestrating them to match your organization's unique business processes and user personas**.

To that end, we recommend asking your account team for guidance around the tools available and the factors to consider when building automations.

Salesforce Integration Resources

Feature(s)	Resources
Salesforce Channels	Salesforce Channels Implementation Guide - Step-by-step walkthrough of how to configure Salesforce Channels
Agentforce in Slack	Agentforce in Slack Admin Setup Guide - Step-by-step walkthrough of how to configure Agentforce in Slack