Implementation Guide

Salesforce in Slack

Overview

This guide provides a detailed walkthrough of the steps required to configure and implement the Salesforce App and Slackbot, 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,, Salesforce Channels, and others which are discussed later.

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

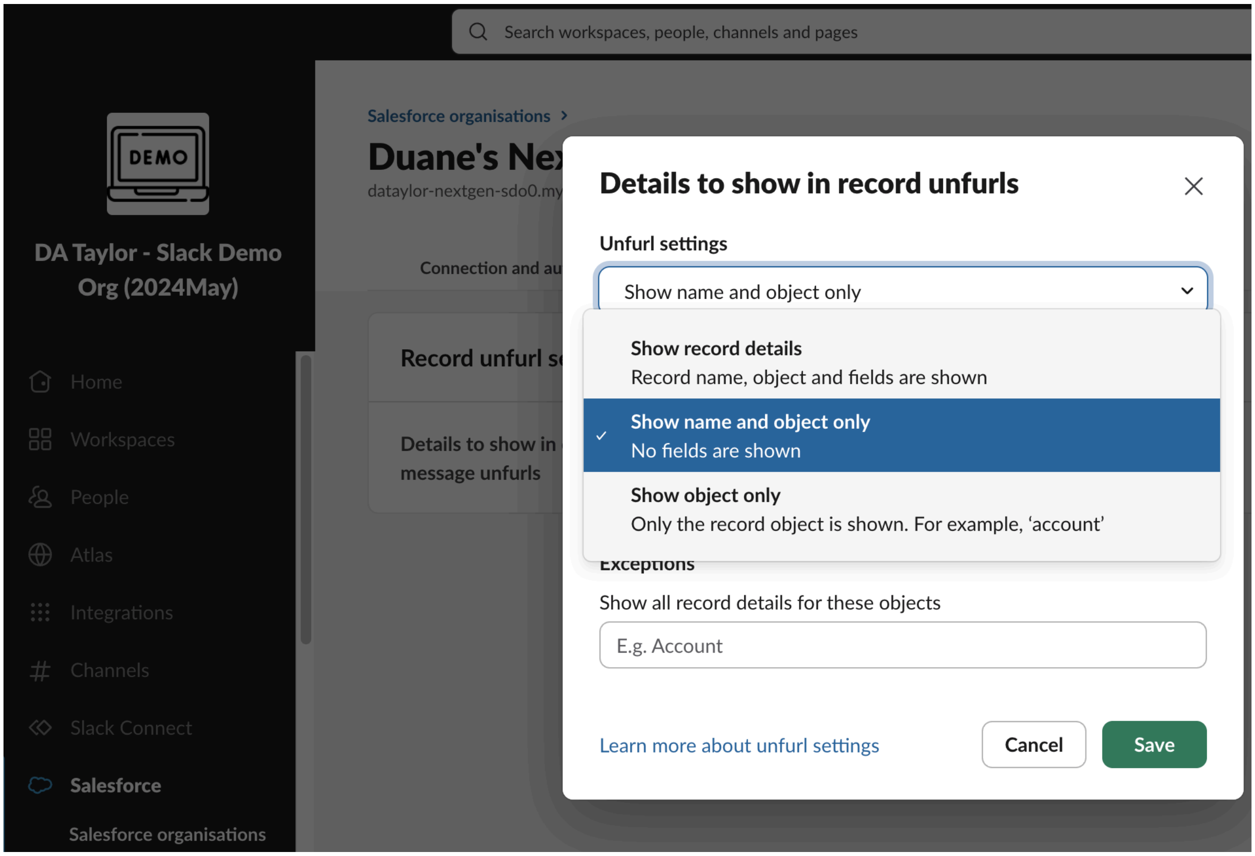
When someone shares a Salesforce record link in Slack, the record preview (unfurl) is **generated using the sharer's permissions** - showing only the fields and data they can see in Salesforce. Everyone in that Slack conversation can then view this same preview.

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

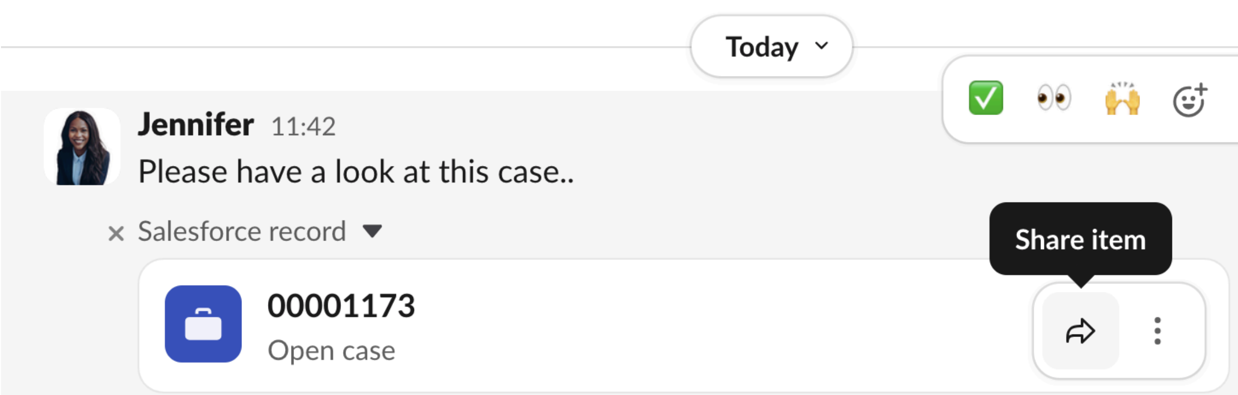
- Show record details - Display record name, object name, and selected fields
- Show name and object only - Just the record name and object name (no field data)
- Show object only - Only the object name (e.g., "Account", "Opportunity")

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

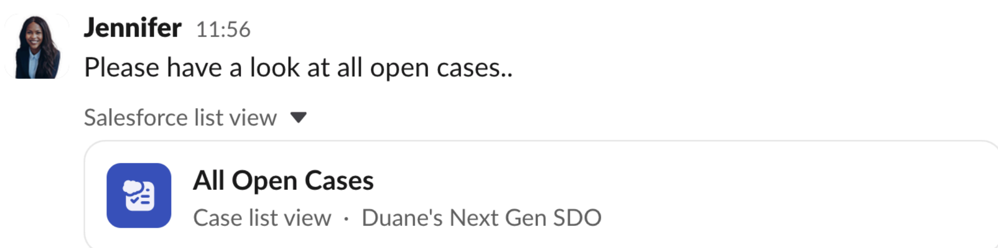
List view sharing uses the unfurl configurations to control what is shown. More specifically:

- **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.

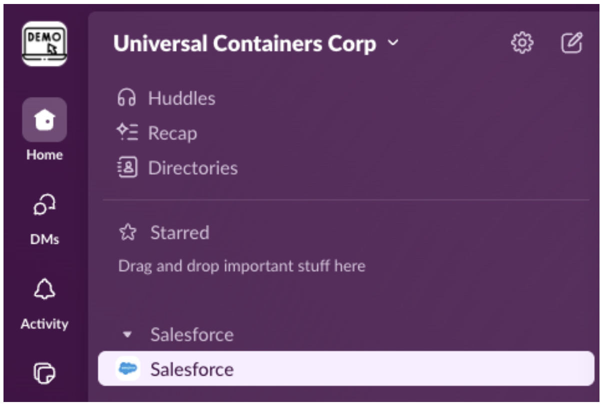
<u>What Non-Licensed Users Can Do</u>

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

<u>What Non-Licensed Users Cannot Do</u>

- 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

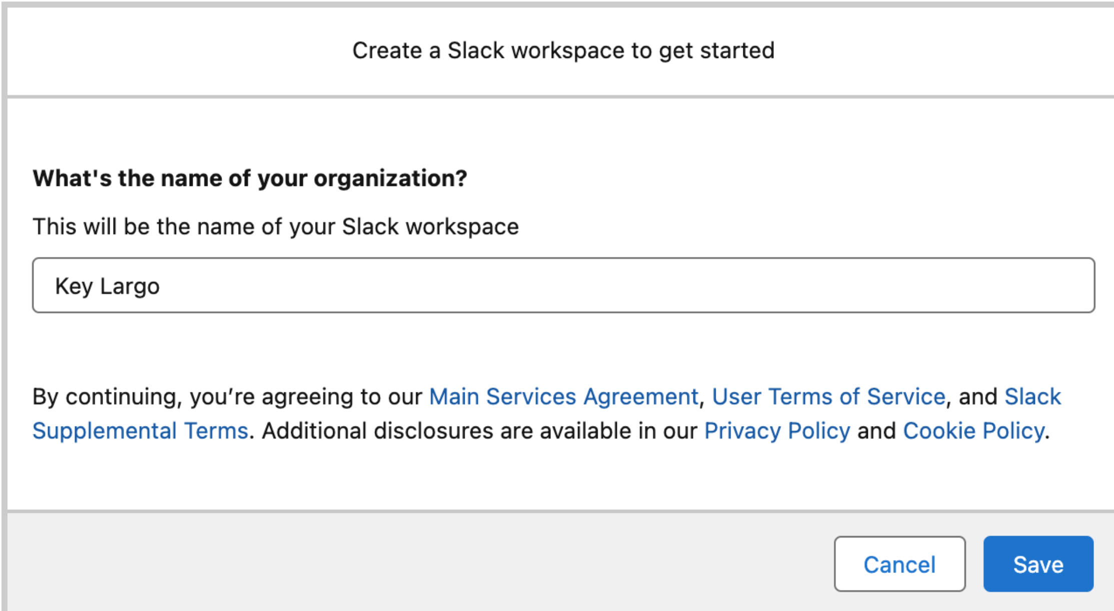
The steps in this section are the only required steps in the process. Additional steps can (and should) be taken to ensure end users have the experience that best fits your teams' needs, which will be covered later.

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).

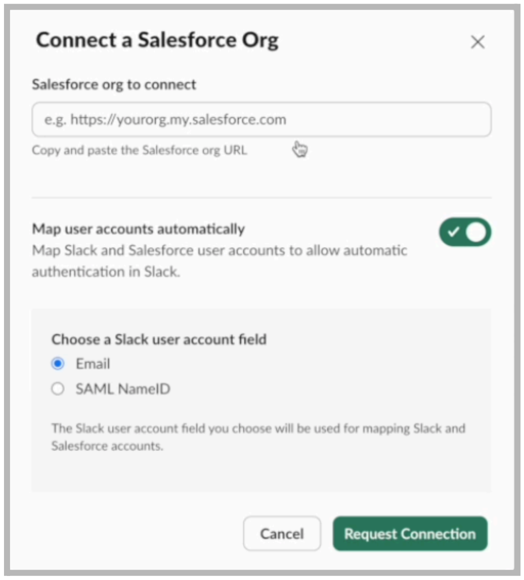
To do this, you'll need the following permissions:

- 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:

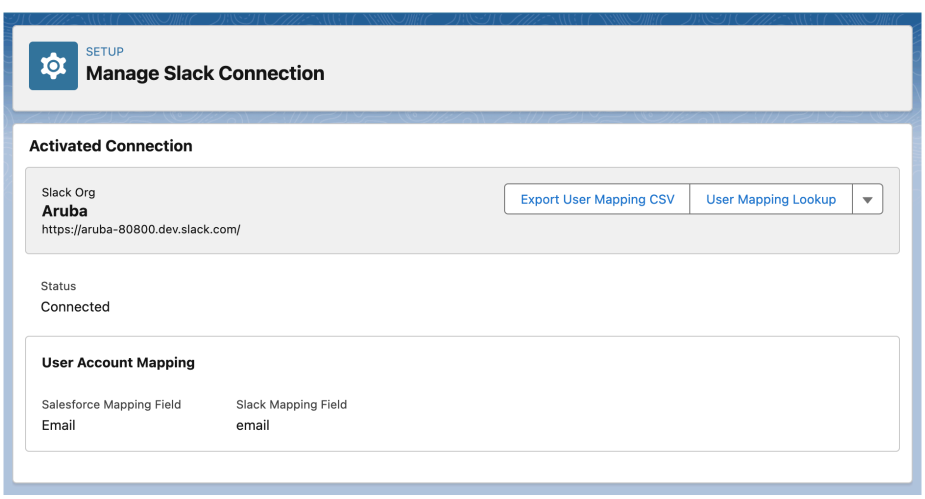
1. In Slack, navigate to the *Salesforce organizations* page in the admin console (Click your **workspace name** in Slack> **Tools & Settings** > **Manage Salesforce organizations**)
2. Select **Connect Salesforce Org**
3. Enter in the URL for your Salesforce environment
4. Select the field that you'd 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**



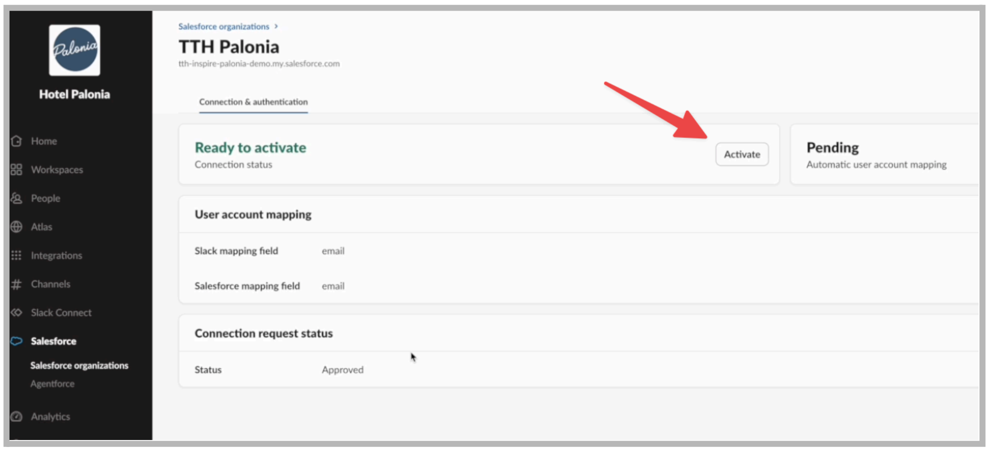
Next, accept the connection request in Salesforce:

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.

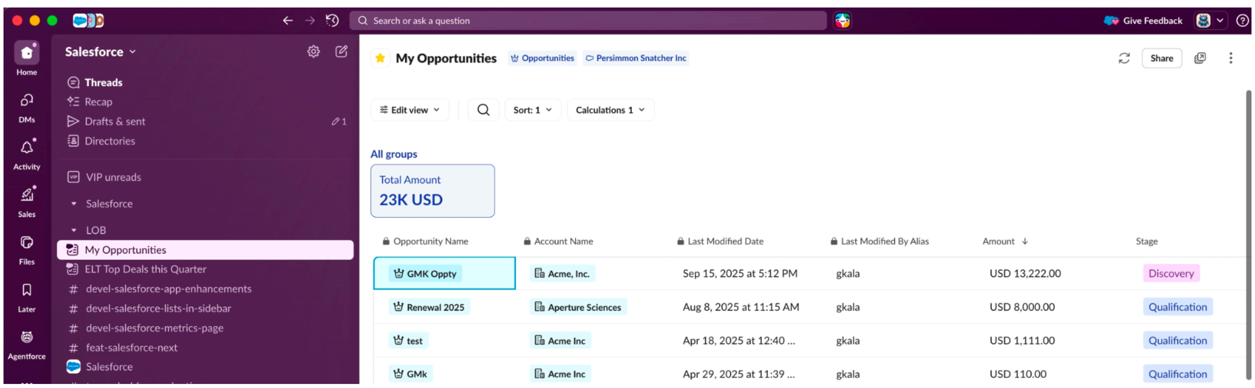
Important Note:

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).

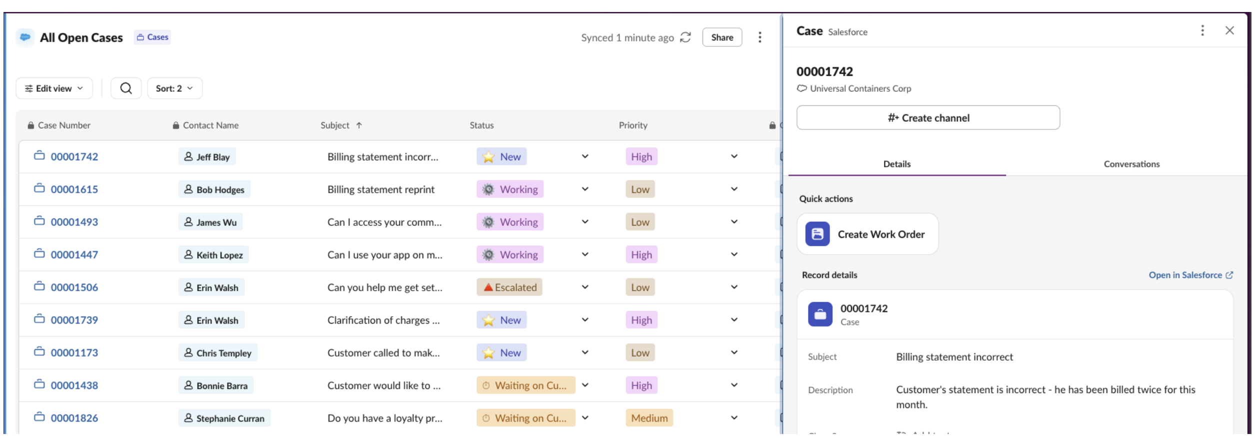
The system will attempt to map your users with the selected mapping field. If the values in those fields match between Slack and Salesforce, we will store the user's mapping. The next time this user loads the Slack client or attempts to access Salesforce data, they will be automatically authenticated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

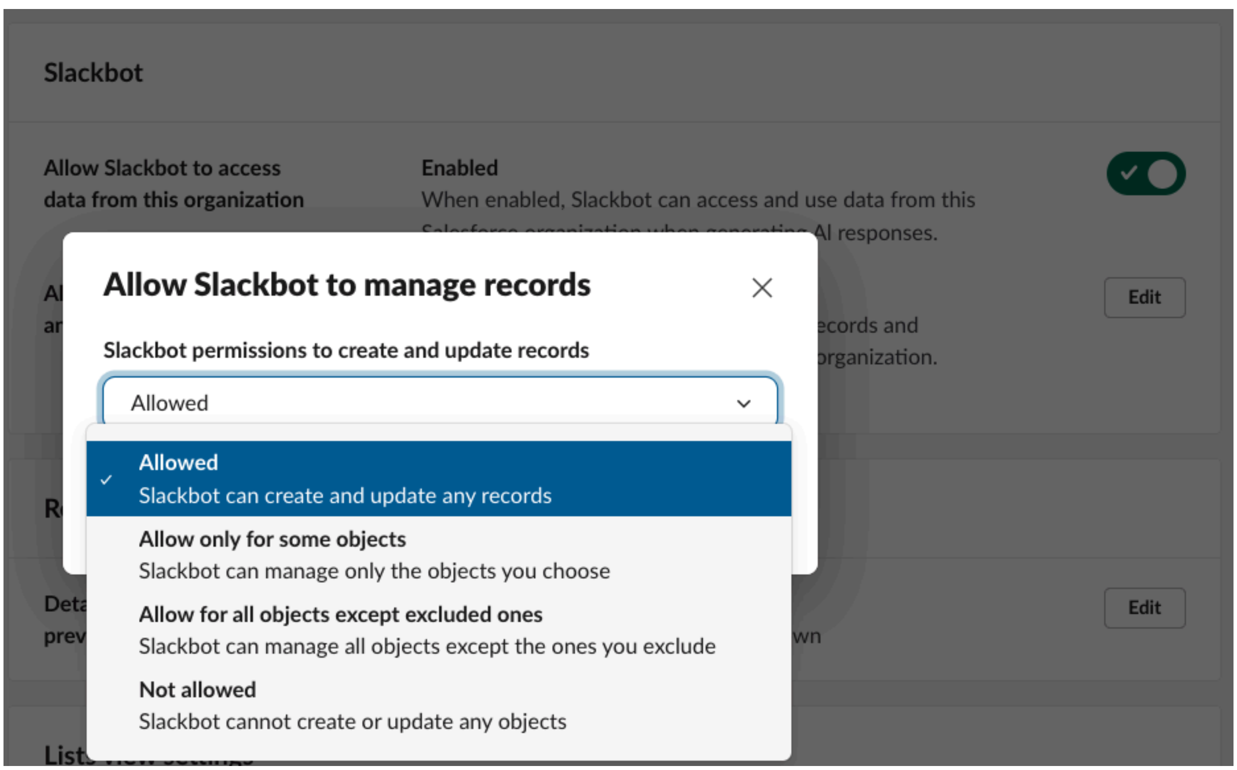
Slack admins should work closely with their Salesforce administrators and business teams to **determine the optimal configuration for their users**. This collaboration might include creating [Slack-specific record layouts]() and/or [Slack-specific unfurl layouts]() that are optimized for the Slack user 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.

Slackbot

Slackbot is Slack's built-in digital assistant. With the Salesforce integration enabled, it becomes a conversational way for users to find, create, and update Salesforce records without leaving Slack. Slackbot's interactions with Salesforce data respect user permissions in the same way we've previously discussed in this guide.

Admin Configuration

Admins control Slackbot's access to Salesforce on a per-org basis from the *Salesforce Organizations* page used in the previous section. From there, you can manage Slackbot access to connected Salesforce organizations by turning off access completely, or restricting it at an object level and on a create/update basis.

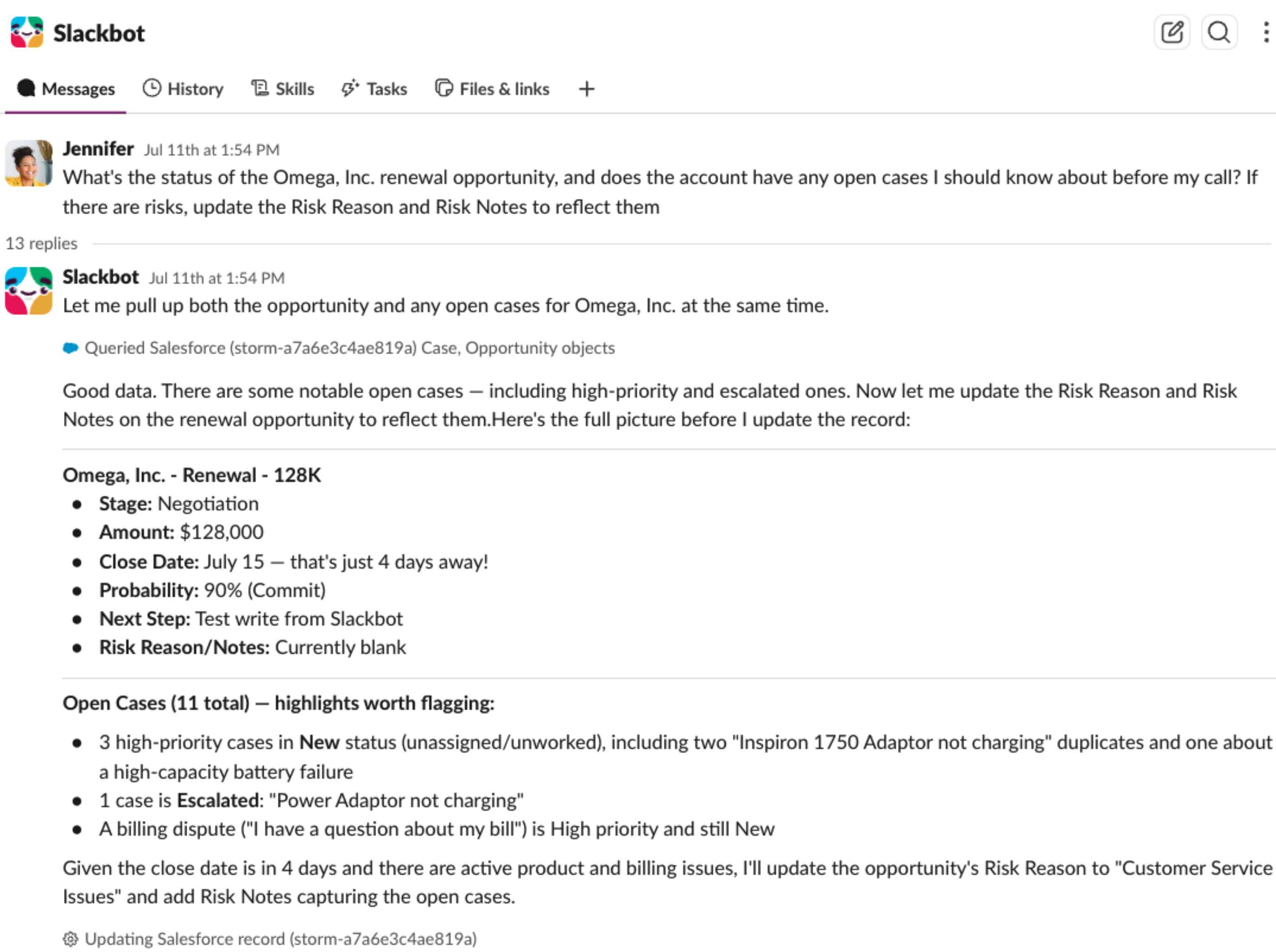


What Users Can Do With Slackbot

Once enabled, users can write prompts in Slackbot such as:

- What are my open opportunities over $50K closing this quarter?
- I'm new to the Acme Corp account, please pull together what's in Salesforce, recent Slack conversations about them, and check their latest 10-K to help me get up to speed
- Summarize all the open high-priority cases for Acme Corp to help prepare for my upcoming call with them in case I need to address any pressing support concerns
- Create a case for Jane Smith about a billing discrepancy on invoice #4521

If any operations will change data in Salesforce, Slackbot asks the user to confirm before anything is written to Salesforce, so data is never changed without a go-ahead.



Scaling the Integration Across Your Organization

Now that your base configuration is in place and users can interact with Salesforce data from Slack, a much wider set of capabilities is available to you. There are multiple features available, some of which are listed below. 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. Features to explore include:

- Salesforce Channels - connect Slack conversations directly to CRM records (Accounts, Opportunities, Cases), so teams collaborate where the data lives.
- Slackbot & MCP - extend Slackbot beyond native CRUD to trigger Flows, Apex actions, and other agent-driven automations, and connect it to other MCP-enabled systems.
- Automation with Flow Core Actions - trigger Slack notifications or approval steps directly from a Salesforce Flow, or kick off a Salesforce workflow from a Slack event.
- Approvals in Slack - bring Salesforce approval steps into Slack's record flex pane, with inline record context so approvers can act without switching tools.
- Agentforce in Slack - bring Agentforce agents into Slack conversations.

We recommend working closely with the leaders in your business to identify where each of these capabilities may fit, and to scale the integration out across your organization in a way that aligns with your organizational goals. Your Salesforce account team can also help you think through the tools available and the factors to weigh as you develop your rollout strategy.