Implementation Guide

Salesforce Channels

Overview

Delivering customer success is a team effort. But, it's hard to work together efficiently with a full, shared view of the customer when team discussions and context are trapped in silos, fragmented across email and chat, and disconnected from your CRM. This fragmented way of working fuels misalignment and poor productivity.

That's why we built Salesforce channels. Salesforce channels allow organizations to create a dedicated space to collaborate around any Salesforce record, unifying real-time team conversations with customer data and allowing teams to collaborate wherever they're working–whether that's in Salesforce, or in the Slack app. With Salesforce channels, teams can efficiently work together, make smarter decisions and take faster action, powering customer success and revenue growth.

In this guide, you'll learn how to configure and launch Salesforce channels to give your team a whole new way to collaborate with your customer at the center of every conversation.

How it Works

For your Salesforce users:

- Salesforce channels allow you to create a dedicated channel for any Salesforce record (the Salesforce admin controls which objects get configured).
- Anyone with access to the record has access to the channel, ensuring that everyone stays in the loop.
- Users are able to work in whichever platform they choose. Either collaborate in Salesforce, or in Slack, which is available on desktop & web as well as on-the-go with the Slack mobile app.
- In Slack, users can view and edit Salesforce data based on the level of access they have in Salesforce.

For Slack users who don't have access to Salesforce:

- These users will be able to use the “Messages” tab of the Salesforce channel and collaborate in the Slack app. They will not be able to view or edit Salesforce data.

Guest users on your workspace can be added to Salesforce channels in the Slack app, but cannot link their Slack and Salesforce user accounts. This means they cannot see Salesforce data in Slack or access the channel in the Salesforce UI.

Eligibility

Slack:

- All free and paid plan customers

Salesforce:

- Supported in all "standard" editions
- User license types
    - "Salesforce" “Platform” user license types:
        - Salesforce Platform Login
        - Lightning Platform - One App
        - Force.com - App Subscription
        - Company Community User
- **Exclusions:**
    - GovCloud orgs
    - Experience Clouds - external collaboration not supported

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Step 1 - Connect Slack and Salesforce

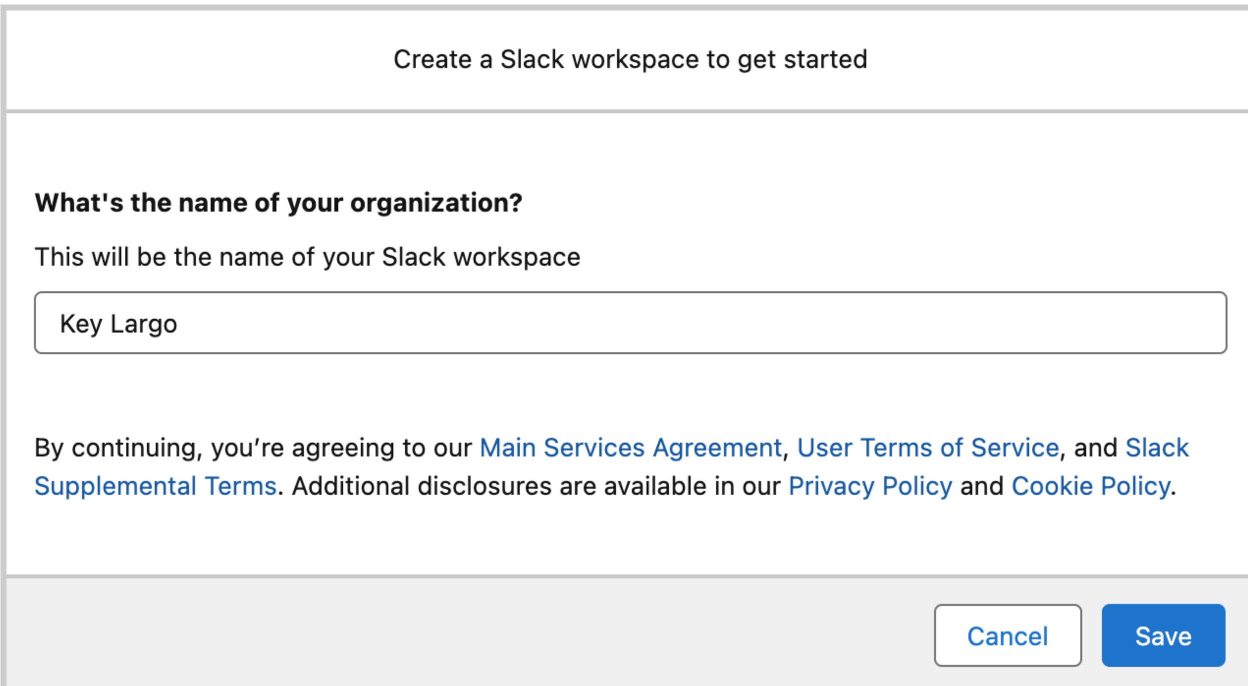
There are distinct steps to connect Slack to Salesforce, depending on whether or not your organization already uses Slack to collaborate internally.

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).

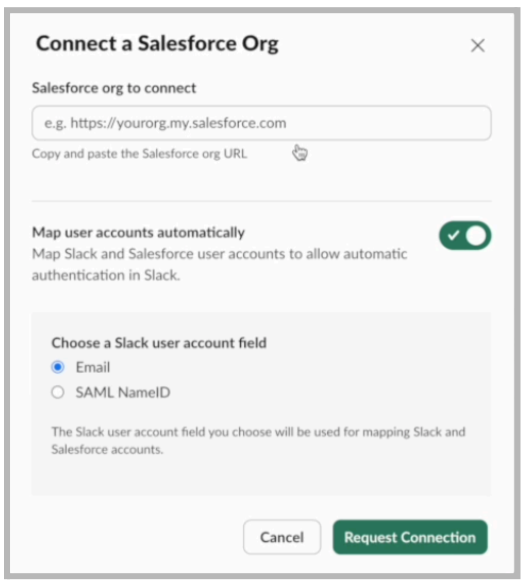
To do this, you'll need the following permissions:

- 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

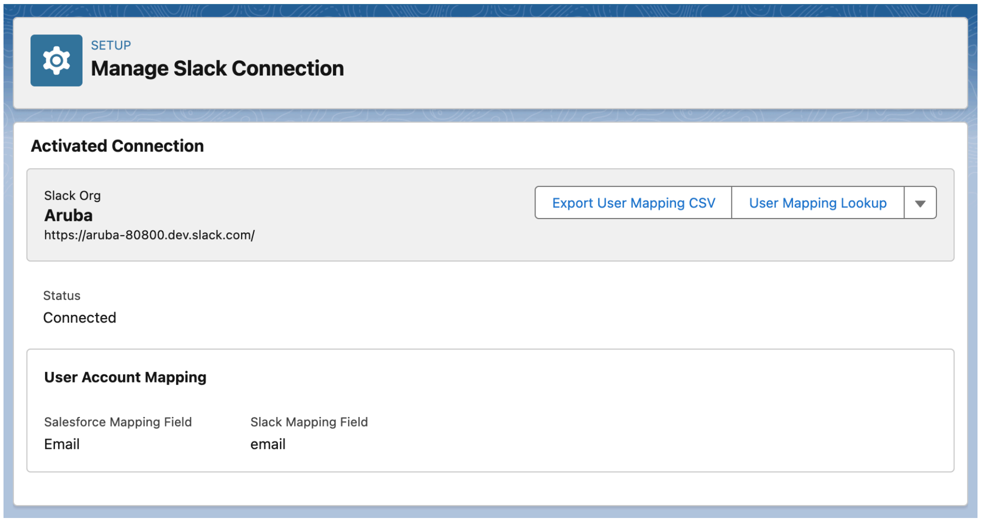
First, initiate the connection process in Slack:

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**



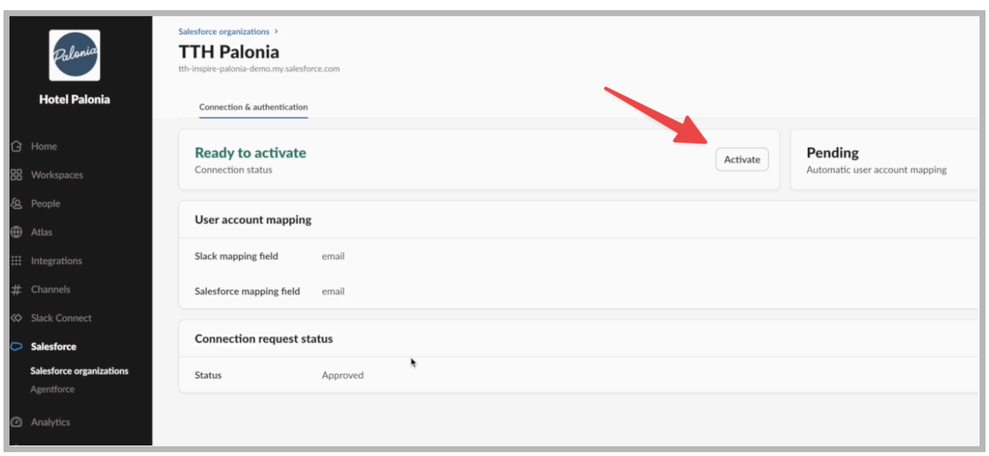
Next, accept the connection request in Salesforce:

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**



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



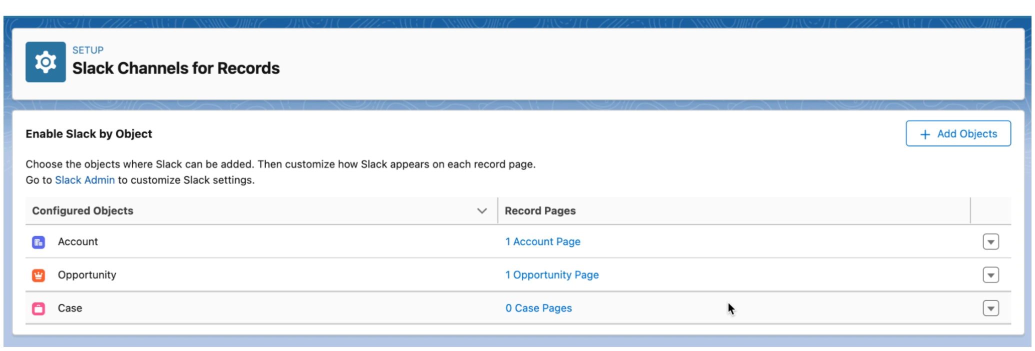
Important Note:
If you disable the **“Map user accounts automatically”** toggle instead, all of your end users will need to manually authenticate to connect their Slack <> Salesforce accounts in order to use Salesforce channels.

We recommend you enable it instead to remove this cumbersome manual authentication step for your end users. When “**Map user accounts automatically**” is enabled, we will attempt to map your users with the selected mapping fields. If the values of those fields match, this means we are able to identify the user on both the Slack and Salesforce side. We then store the user’s mapping. The next time this user loads the Slack client, they will be auto authenticated into their Salesforce account and they will see their Salesforce data in Slack. If the user instead loads a record page with the channel component in Salesforce first, we will auto authenticate them into their Slack account so they can see their Slack channel content.

Step 2 - Configure objects for Salesforce Channels

Once you’ve connected your Slack and Salesforce environments, the next step is to configure which objects you’d like to use for Salesforce Channels. You can select any standard or custom object. Specifically, the object must be supported by the [UI API.](#)

To customize the objects that you’d like to use for Salesforce Channels:
1. In Salesforce, select Setup.
2. In the Quick Find box, search for and select **Slack Channels for Records**
3. For any objects you’d like to enable, select **[+] Add Object** in the top-right corner.
4. Search for and select the objects you’d like to allow.
5. Click the **Edit** button to open the record page in Lightning app builder.
6. Add the “Slack” component to the page and click **Save** to finish.



Step 3 - Grant access to Slack for your users

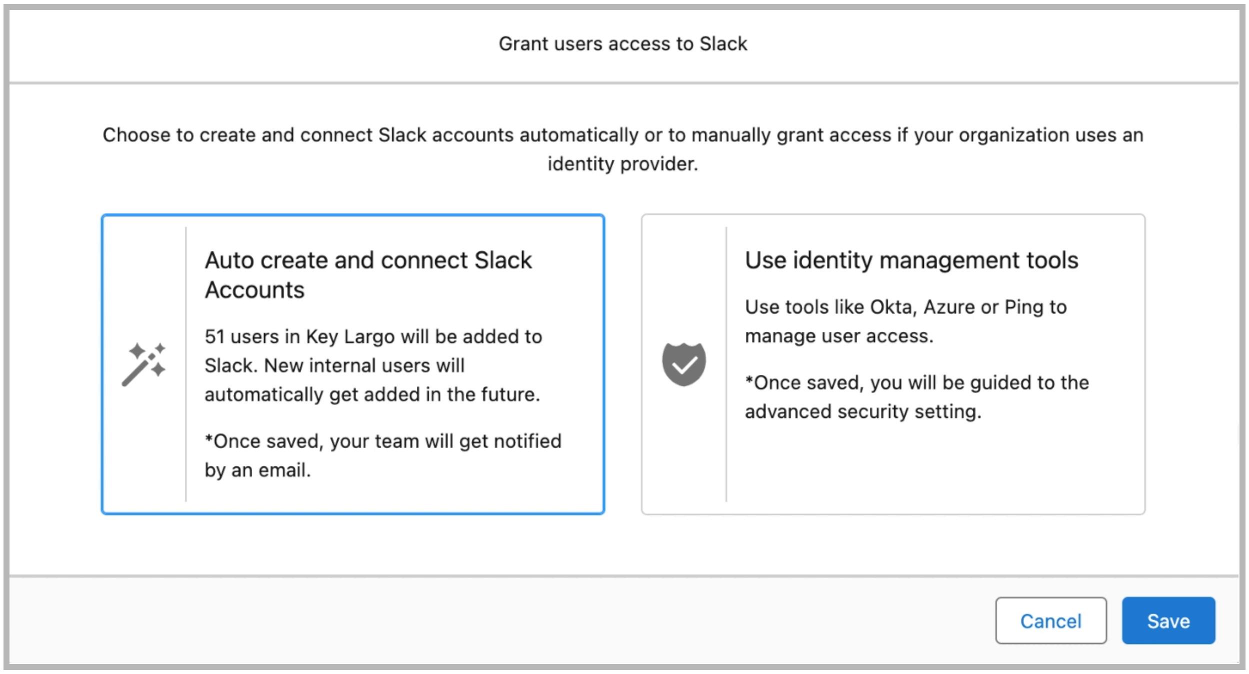
If you are connecting to an existing Slack workspace, and all your users who need to access Salesforce channels already have Slack access, you can skip this step.

All users who should have access to Salesforce Channels need a Slack user account. If you are connecting a new workspace, or if you have an existing workspace and want to give all your Salesforce users access to Slack, you can leverage this step to provision Slack user accounts for all your Salesforce users. You can either provision Slack users for all of your Salesforce internal users automatically, or you can leverage an identity provider like Okta to automate user access.

To configure user access, in the Salesforce Admin Console:

1. Select **Setup**.
2. In the Quick Find box, search for and select **Slack Guided Setup**.
3. Under *Grant users access to Slack automatically*, click **Manage**.
4. Choose **Auto create and connect Slack accounts** or **Use identity management tools**, select Save, then follow the prompts to complete your setup.

When you grant users access to Slack automatically, they'll receive an email prompting them to set up their Slack accounts.



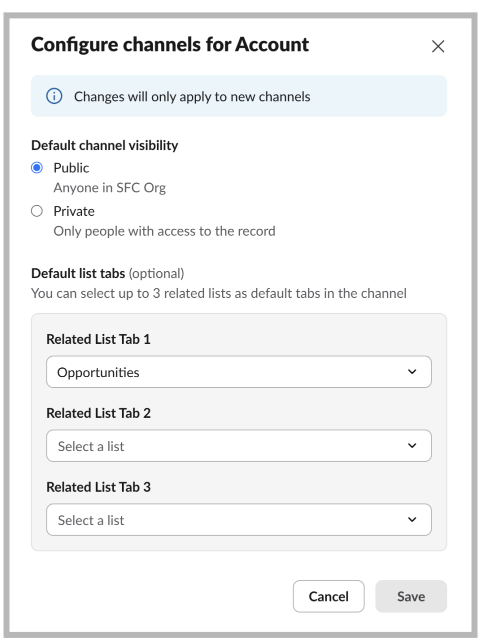
Alternatively, you can manually invite members of your team to grant them Slack access for testing purposes.

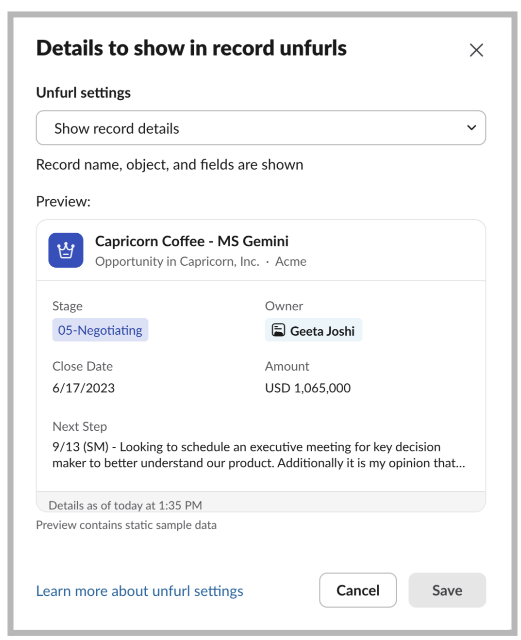
Step 4 - Configure additional settings

You can configure additional settings to customize the experience of Salesforce channels in the Slack app. In particular:

1. **Privacy settings:** You can configure whether Salesforce channels should be created as public or private channels. Note that for **Enterprise Grid** organizations, Salesforce channels are created as org-wide channels and available in all workspaces.
    a. **Public**, which means that any Members in your Slack workspace can find and join them; or
    b. **Private**, which means that users will need to be explicitly invited in order to join the channel. Anyone with access to a record in Salesforce can still join the channel, even if it's private.
2. **Default related lists:** You can also configure up to 3 related lists that should be added as default tabs in Salesforce channels when viewed in Slack. Users can always add or remove tabs in their channels to suit their needs.

3. **Slack record layouts:** When users view a record in Slack, the default display is based on the page layout assigned to the corresponding record type for the user's profile. Users can only view and edit data based on their permissions in Salesforce. You can override that with a specific Slack Record Layout that should appear for a user.
    a. Note that regardless of which Quick Actions are configured on the Slack Record Layout, Slack will always display the Quick Actions that are configured on the Page Layout.
    b. Slack does not display data based on the Lightning Record Page that may be configured in Salesforce.
4. **Record previews:** When a record link is shared in Slack, an unfurl provides a preview of the record to members of the channel. The preview is populated based on the permissions of the person who sent it, and is viewable to all members of the channel, regardless of their Salesforce access.
    a. For each Salesforce instance connected to Slack, you can select options for what should display in record previews. You can choose whether to display record details, just the record name, or just the object name, based on your organizational needs. You can also configure overrides, to allow-list only certain objects to display record details.
    b. For objects that are configured to show details, you can configure which fields display in Slack. By default, record previews are based on the compact layout by default, but you can override the fields that display by configuring a Slack URL Unfurl Layout.

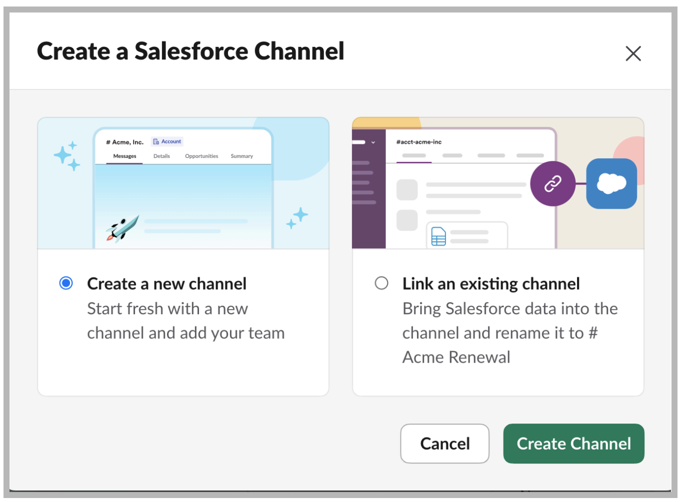




Step 5 - Convert Existing Channels

If your team already uses Slack, you might have existing channels that you want to connect to records. There are two ways to link an existing channel to a record:

1. While viewing a record in Slack, click **Create channel** and select **Link an existing channel.** Then, select your channel.
    a. Any user who has access to a record is able to link it to an existing channel
2. If you have many channels you need to link at scale, you can also automate this process using Admin APIs to link or unlink channels.



Step 6 - Automate Team Processes with Workflow Builder

On the Slack Business+ and Enterprise Grid plans, you can configure automations to create channels, add members, send notifications, or archive channels under certain circumstances.

To get started:

1. Access workflow builder by clicking your **workspace name** in Slack, selecting **Tools & settings**, and then navigating to **Workflow Builder**
2. Select **New workflow** in the upper right corner, and select **Built Workflow**
3. To start the workflow, choose **When a record changes** from the **Salesforce** menu

4. Select the data source representing your Salesforce environment and the object you'd like to leverage for this notification (for example, "Opportunity")
5. Select conditions to trigger the workflow (such as "when record is newly-created"). Add condition groups for *and/or* logic, as well as refine results based on data about your records.
6. Add steps to determine what the workflow should do when the trigger conditions are met. In the **Salesforce channel** section, select steps such as "**Create a Salesforce Channel**" or "**Send a message to a Salesforce channel**

Step 7 - Discover Best Practices

Set your team up for success and help them adapt to change with these tips & assets.

To get started:

1. **Engage the right stakeholders**, including your Salesforce administrator(s) and Slack administrator(s), as well as your security, legal, and data governance representatives.
2. **Partner with your operations teams** to identify use cases and opportunities to improve business processes across sales, revenue operations, service, marketing, and more.
3. **Communicate the change** with your team, explaining how they can use Salesforce channels to improve collaboration and transparency internally.
4. **Share educational materials**, including this Quick Start Guide as well as these help center resources on how to use Salesforce channels.

References

To learn more about Salesforce channels, check out these handy assets

Learn on Trailhead

- Intro to Salesforce channels
- Get started with Slack
- Agentforce and Slack

Help Center Documentation

- Set Up Slack and Salesforce
- How to use Salesforce Channels
- End User Quick Start Guide for Slack
- Security overview