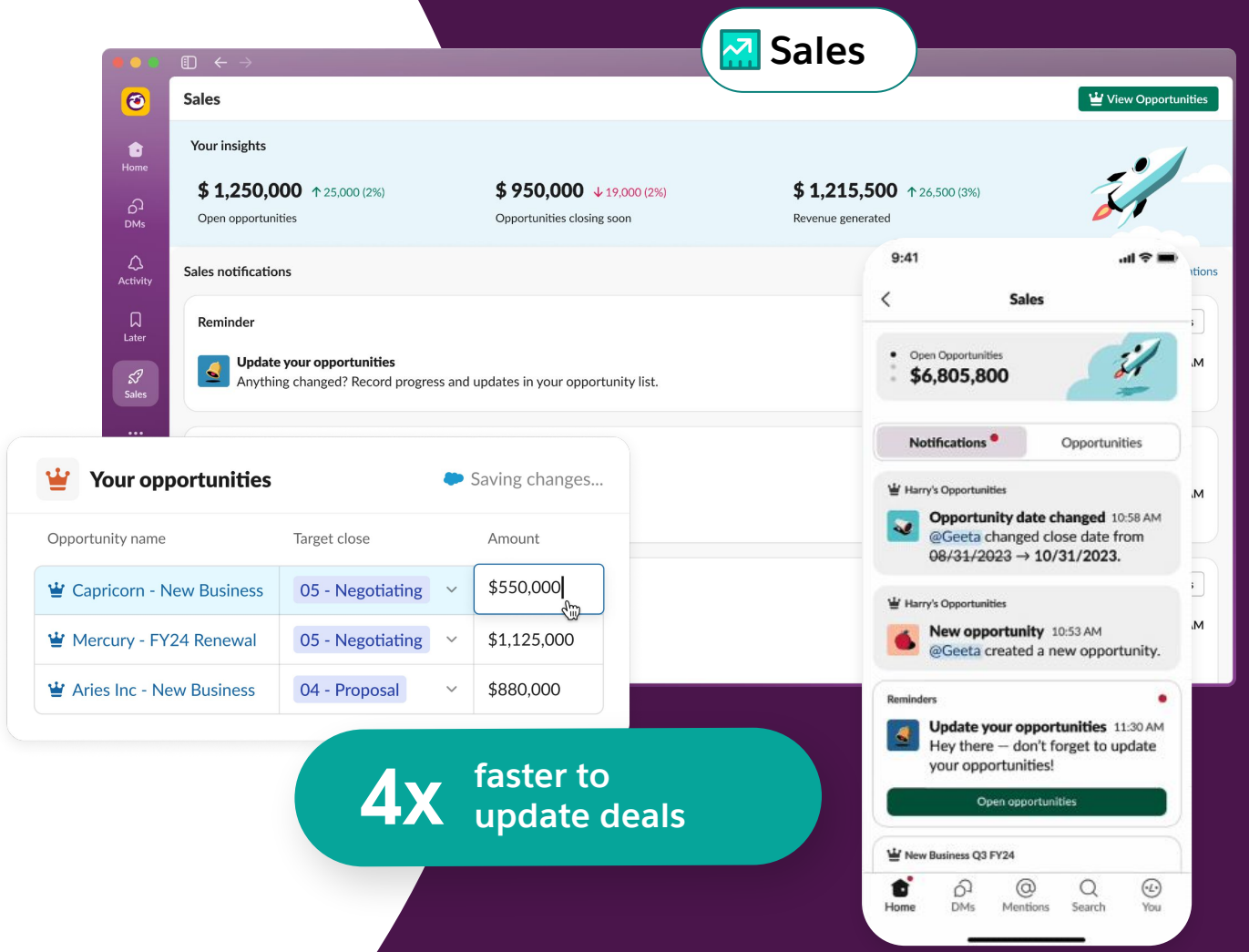
slack
from Salesforce

# Slack Sales Elevate

## Admin Setup Guide




*Salesforce Internal Pilot, July 2023

# Slack Sales Elevate Admin Setup Guide

Contents

## Table of Contents


- Set up Salesforce
- Connecting Slack to Salesforce
- Mapping Opportunity Fields
- Managing Suggested Lists
- Notification Settings
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## Intended Audience and Objectives

**Salesforce Administrator** - Ensure Slack Sales Elevate is connected to the right workspace(s) and opportunity fields, key notification permissions are configured, and the right users have access to the solution, as well as the right recommended opportunity lists.

**Slack Administrator** – Ensure Salesforce Administrator is assigned Sales Admin role in Slack Sales Elevate.

# Verify You've Got Access to Sales Elevate



# Assign the Sales Admin Role

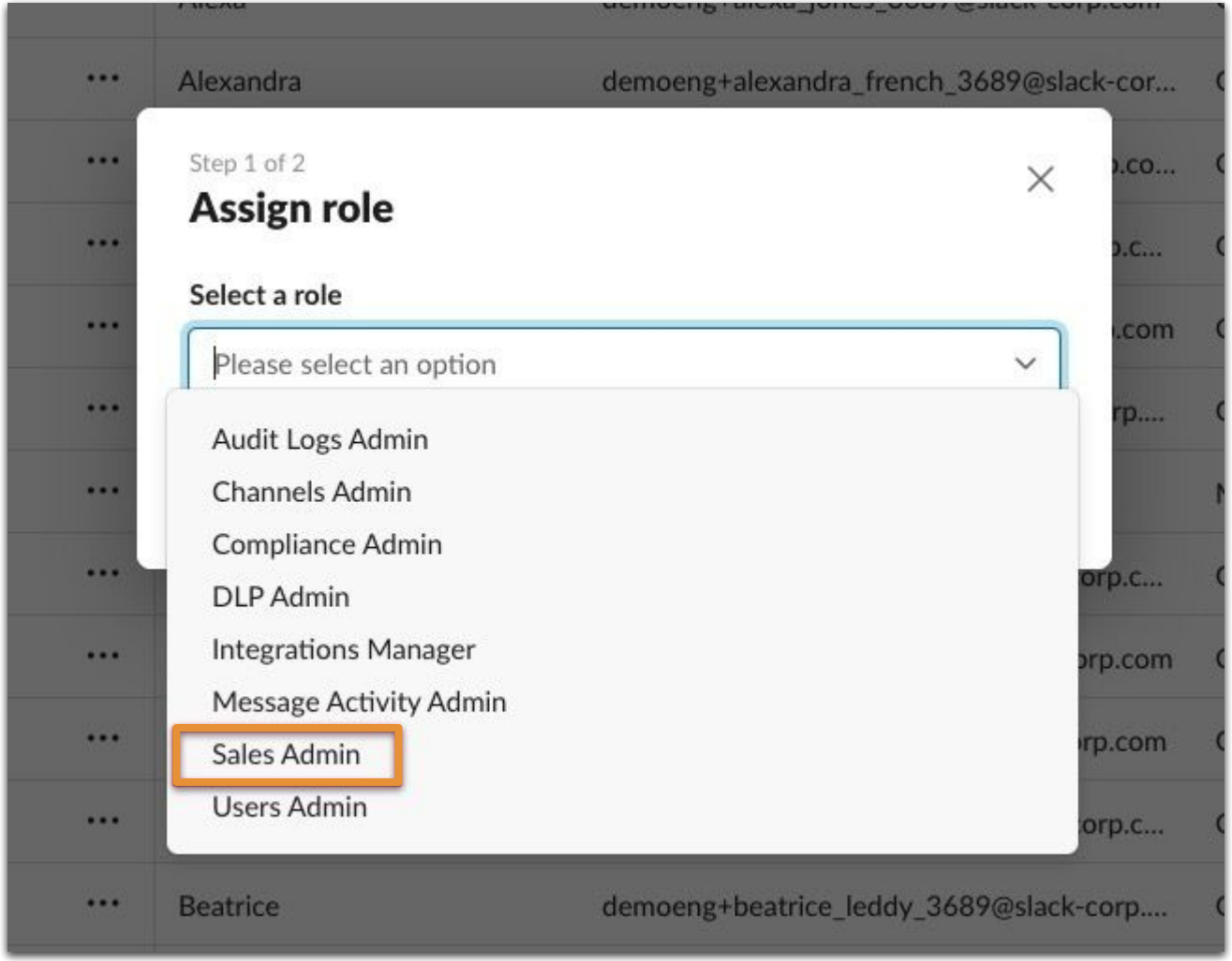
To configure Sales Elevate, you'll need the **Sales Admin** role in Slack.

By default, this is assigned to the Primary Owner of your Grid or workspace.

If you're not the Primary Owner, ask your Slack Org Owner or Admin to log into Slack and assign the role to you (detailed instructions here)

***Enterprise Grid Customers***
*Tools & Settings > Organization Settings > People > Manage Permissions*

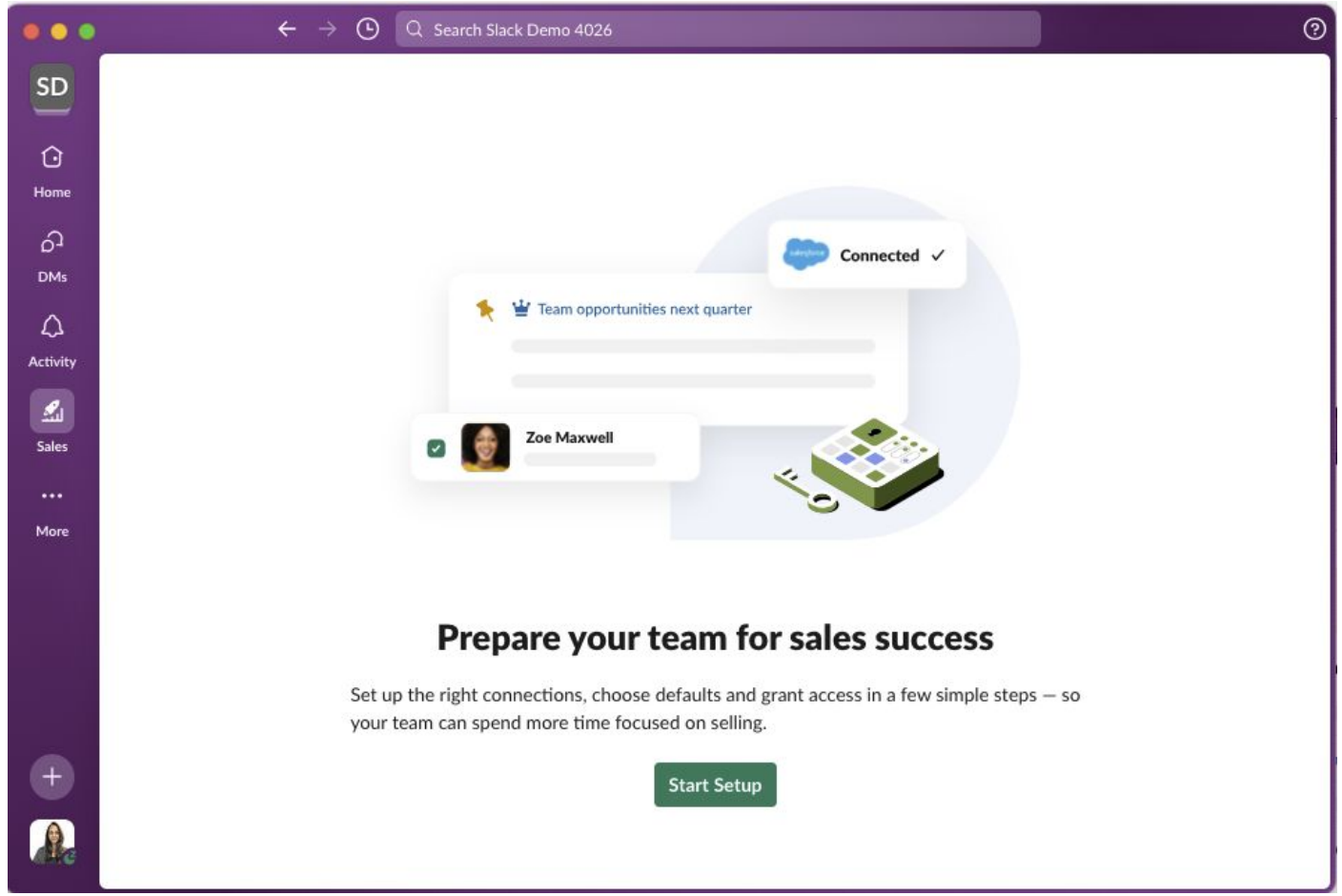
***Business+ Customers***
*Tools & Settings > Workspace Settings > Manage Permissions (in the left sidebar)*



# Sales Elevate Sidebar Icon

Once the role has been assigned to you, refresh Slack using “Command + Shift + R”

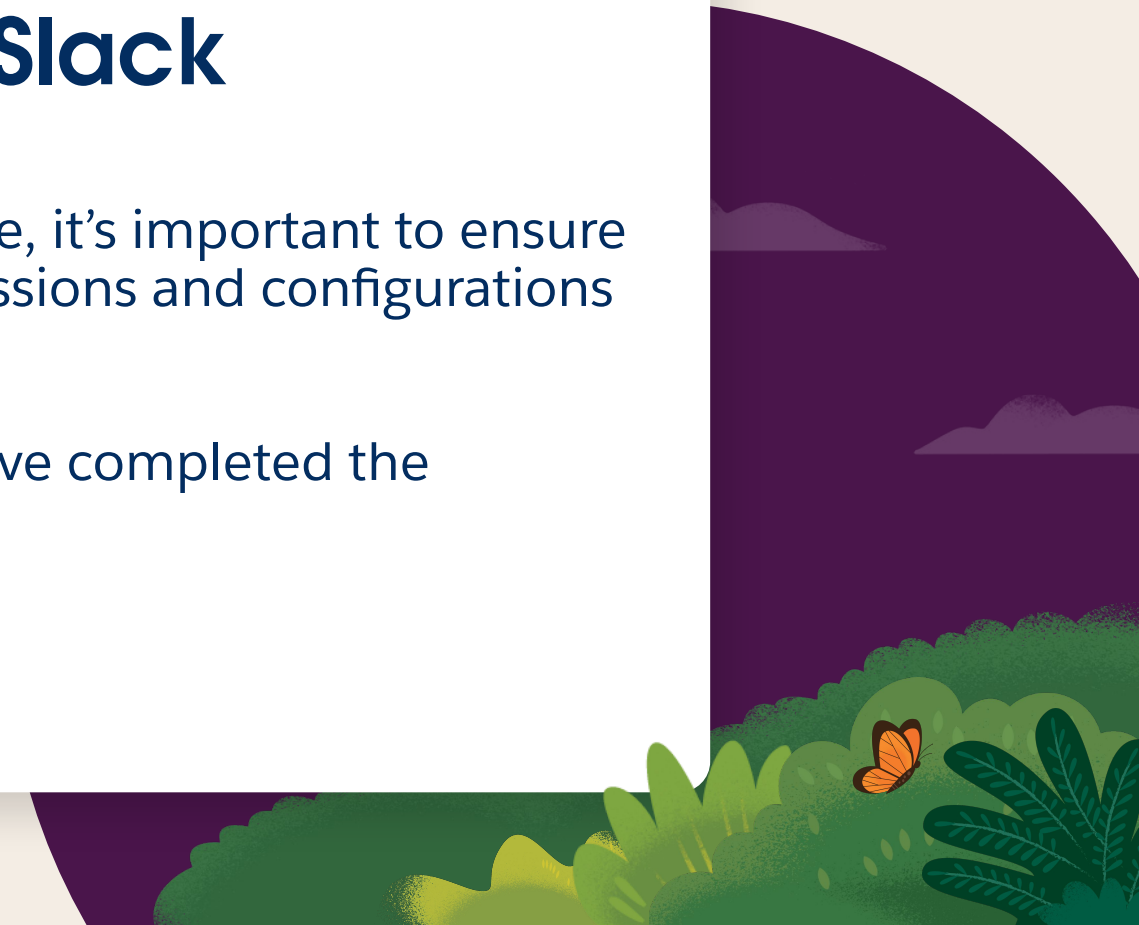
That will reveal the **Sales** tab in your sidebar



# Next, we'll prepare your Salesforce environment to connect to Slack

Before proceeding with linking Slack to Salesforce, it's important to ensure your Salesforce environment has the right permissions and configurations in place

Don't proceed with Slack configuration until you've completed the following steps in your Salesforce environment



# Prepare Salesforce for Sales Elevate



# Background on the Integration User

Slack Sales Elevate uses a integration user to listen for changes to records in Salesforce

You will need to create a user account to power the Elevate notification capabilities.

This user will need **Read Only** and **View All** access to all objects you plan to use to generate notifications.

The integration user is leveraged in combination with end user permissions to determine which information can be shared in notifications.



# How Elevate Leverages the Integration User



## Notification Configuration

When a user configures a notification, their own permissions are leveraged to determine which records are visible to select in the configuration flow.

## Event Monitoring

The integration user is leveraged to listen for updates that are made in Salesforce, to designate whether or not a notification should fire.

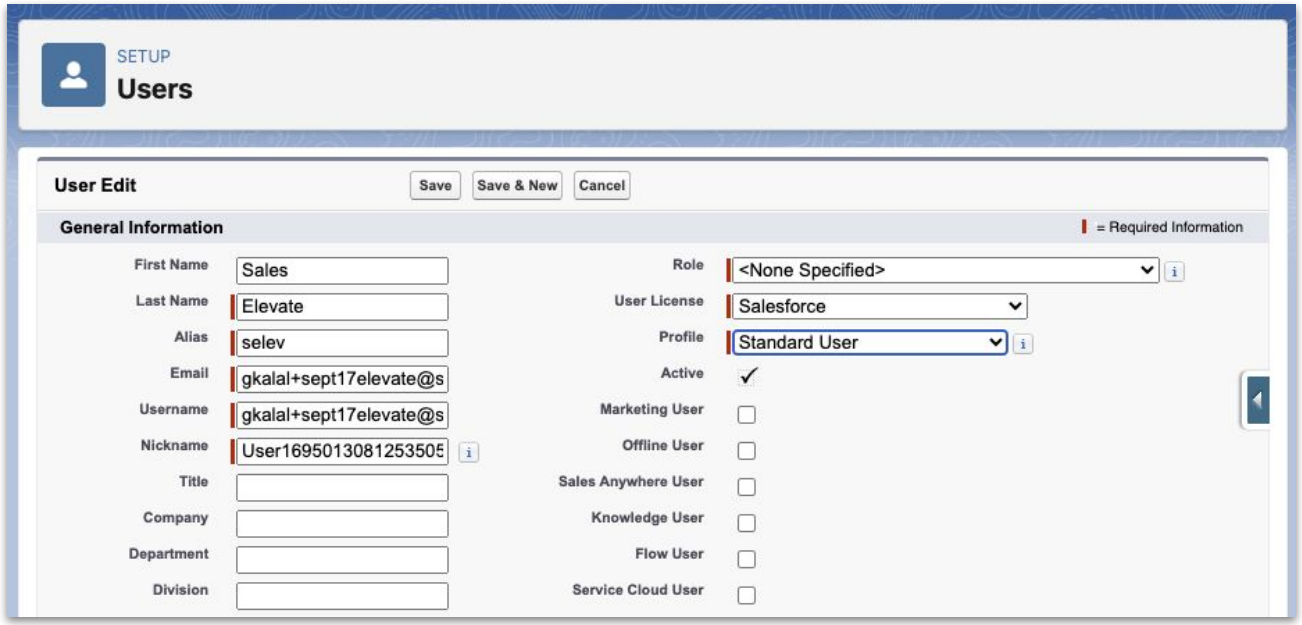
## Notification Transmission

When a notification fires, we rely on either the permissions of the end-user that created the notification or the integration user's permissions (whichever is lower) to determine if a notification can be sent to Slack.

# Create the Integration User

Create a new User

- Log into Salesforce with an Admin account
- Go to **Setup | Users | Users**
- **Click New User** and fill in the details as follows in the screenshot
- Click **Save**




**First Name:** Sales

**Second Name:** Elevate

**Email:** Use an email address you have access to (e.g. an alias for your existing email)

**Username:** Use an email address you have access to (e.g. an alias for your existing email)

**Nickname:** elevate

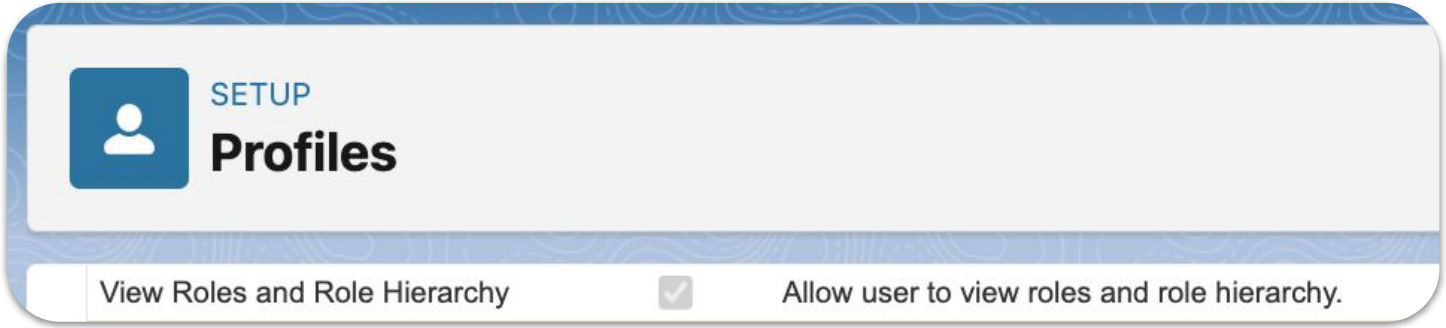
**Role:** Not specified

**User License:** Salesforce

**Profile**: Standard user

# Additional Guidance for Custom Profiles

If you're using a unique profile for your integration user, instead of the Standard User Profile, ensure that the profile includes access to **View Roles & Role Hierarchy**



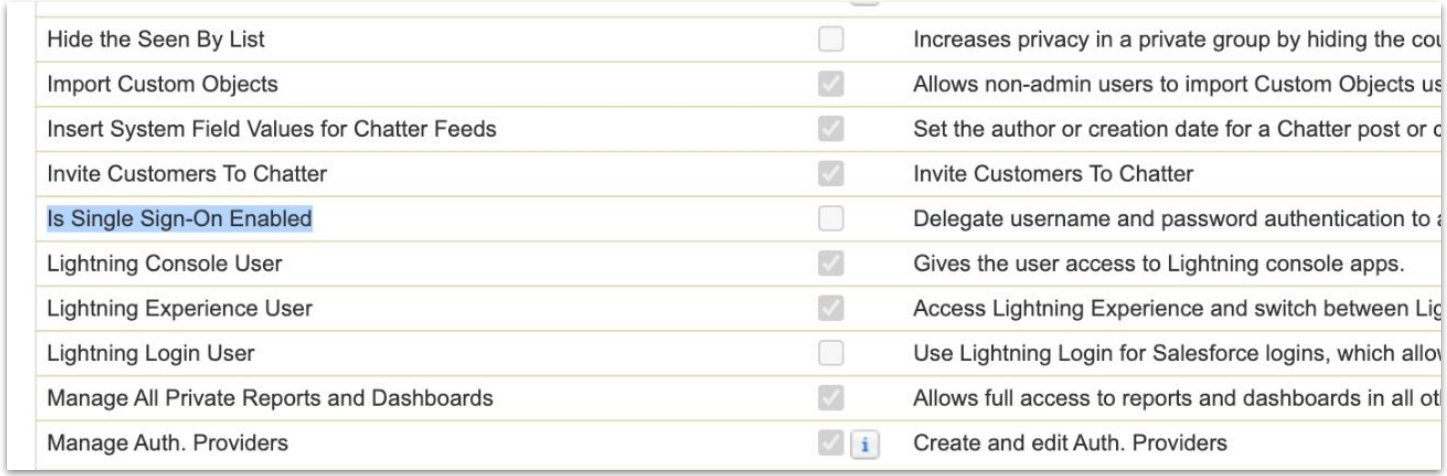
# Allow Integration User to Bypass SSO

If your organization enforces Single Sign-on (SSO) in order to log in to Salesforce, you'll need to allow your integration user to bypass SSO to complete the authentication flow.

To accomplish this, create or assign a profile for the user with SSO disabled.

To create a new profile that allows users to bypass SSO:

1. Navigate to Setup > **Profiles**
2. Find the Standard User profile and select **Clone**
3. Navigate to **System Permissions**
4. Uncheck the "Is Single Sign-on enabled" checkbox for this profile
5. Assign this profile to your integration user



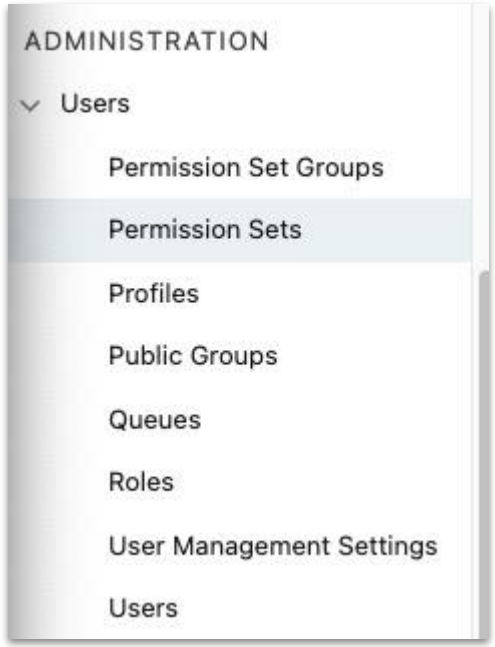
# Create a Permission Set

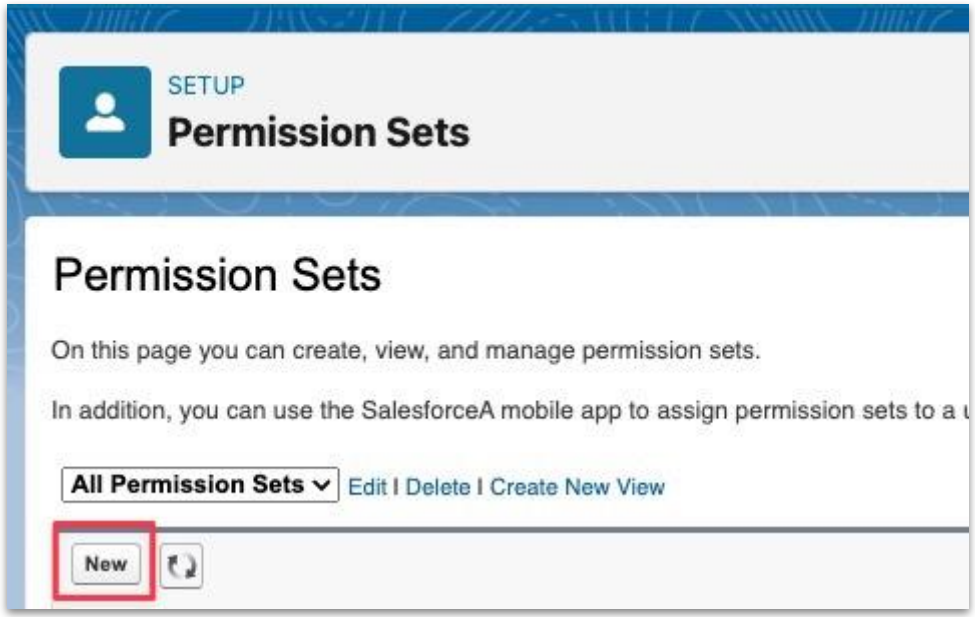
To maximize the value of Elevate, you'll need to give the integration user **Read** access to all objects and all fields that may be used to generate notifications.

Consider using an existing permission set that you leverage for your system administrators or sales operations team members

In lieu of that, you can create a new Permission Set

- Go to Setup | Users | Permission Set
- Click New



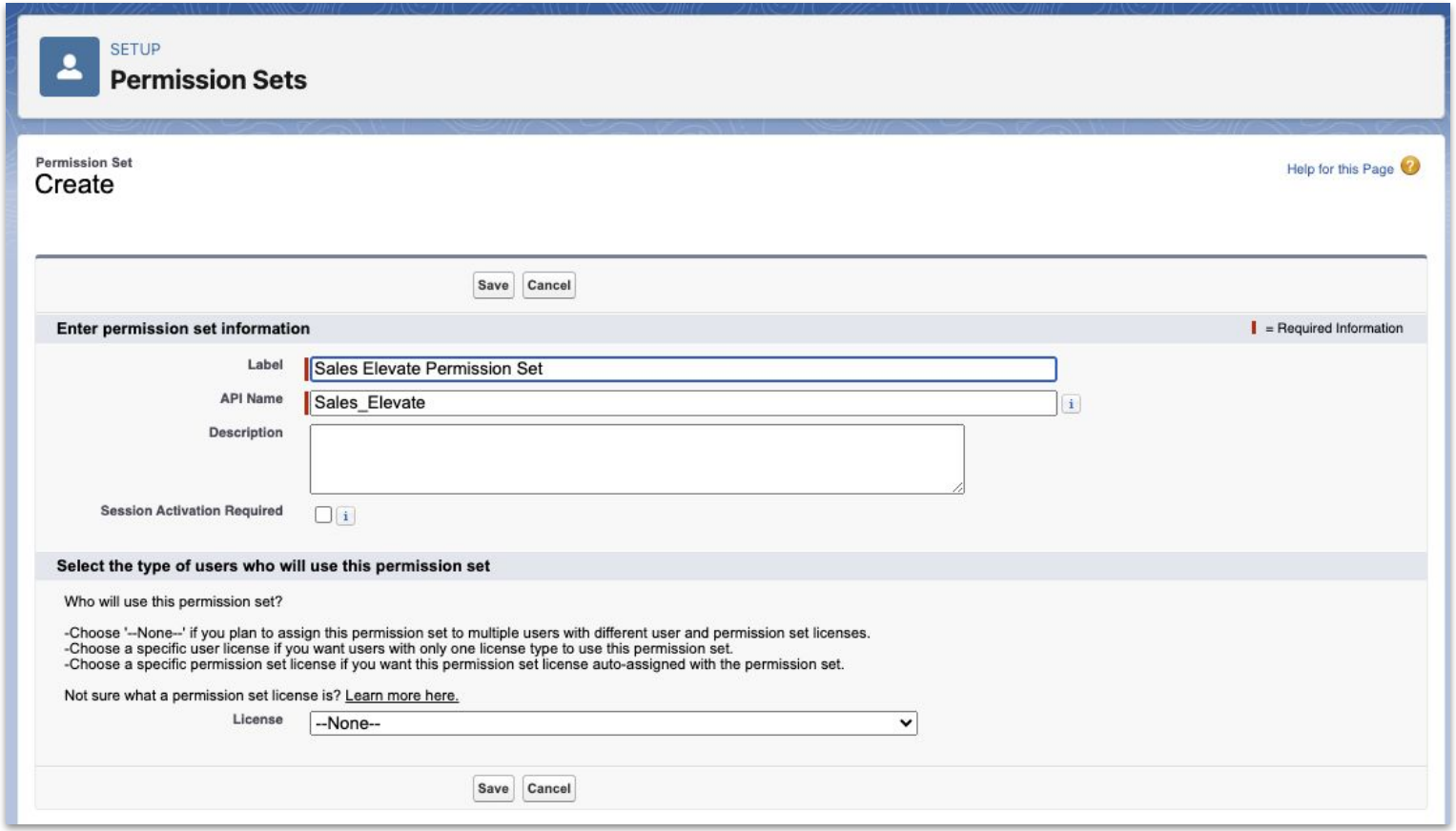



# Create a Permission Set

Enter the following details

- **Label:** Slack Sales Elevate Permission Set
- **API Name:** Leave as auto-generated
- **Do not** specify the **License**
- Leave all other fields the same

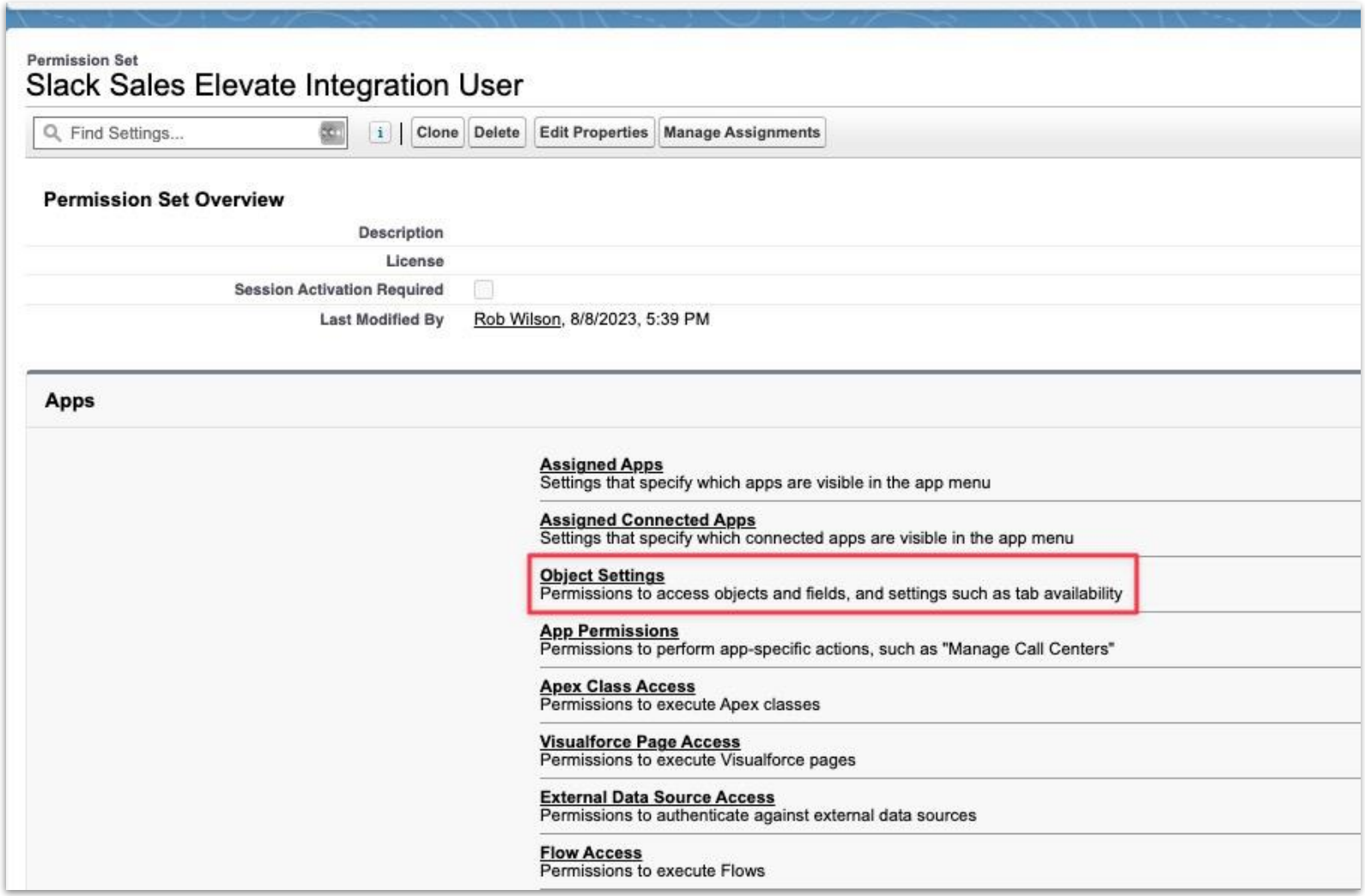
Click **Save**



# Assign Permissions

You should now be on the screen of the newly created Permission Set

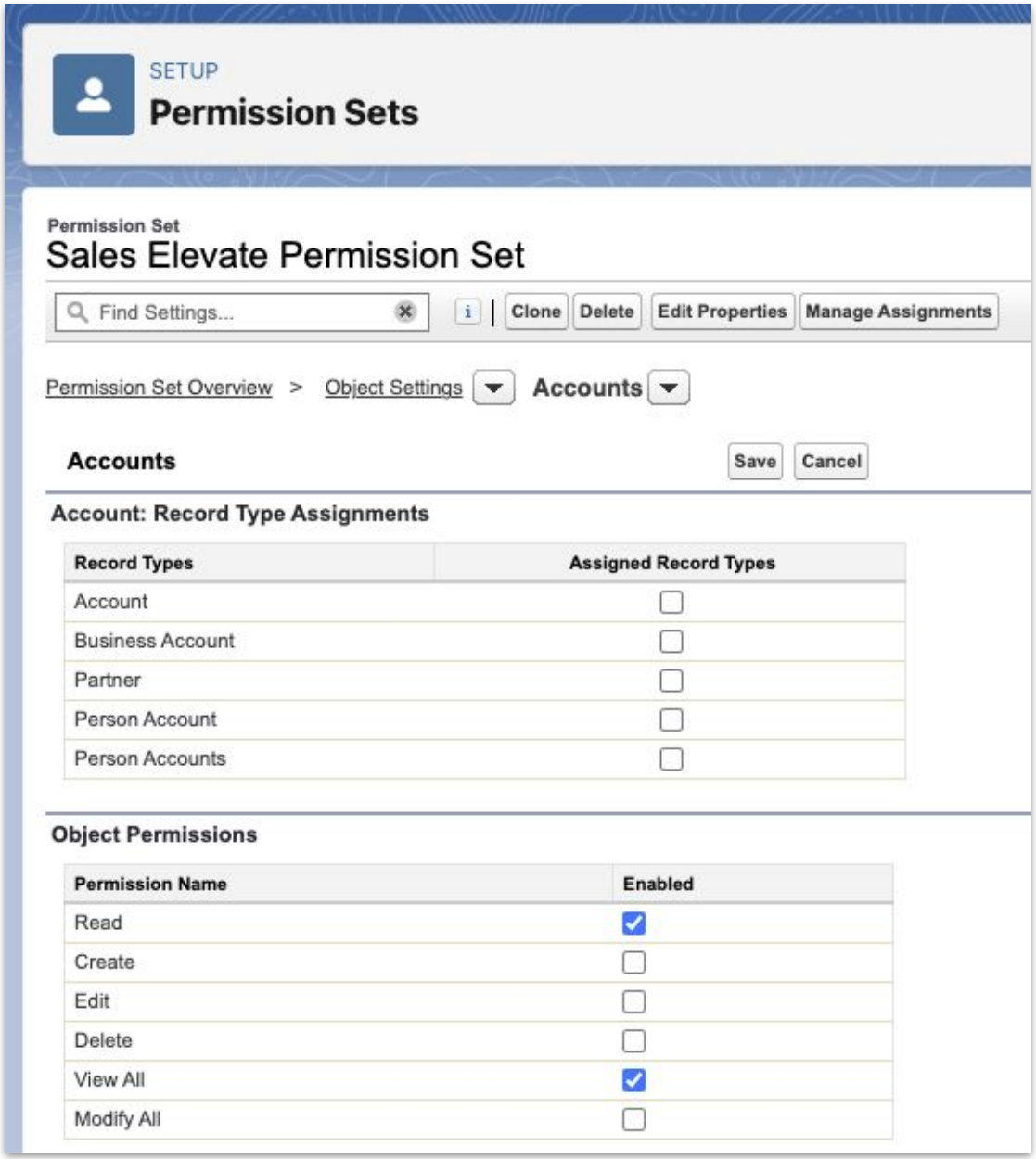
Select **Object Settings**



# Assign Accounts Permissions

Click on **Accounts** in the list

- Click **Edit**
- Under **Object Permissions**
- Select **Read** & **View All** permissions
- Click **Save**



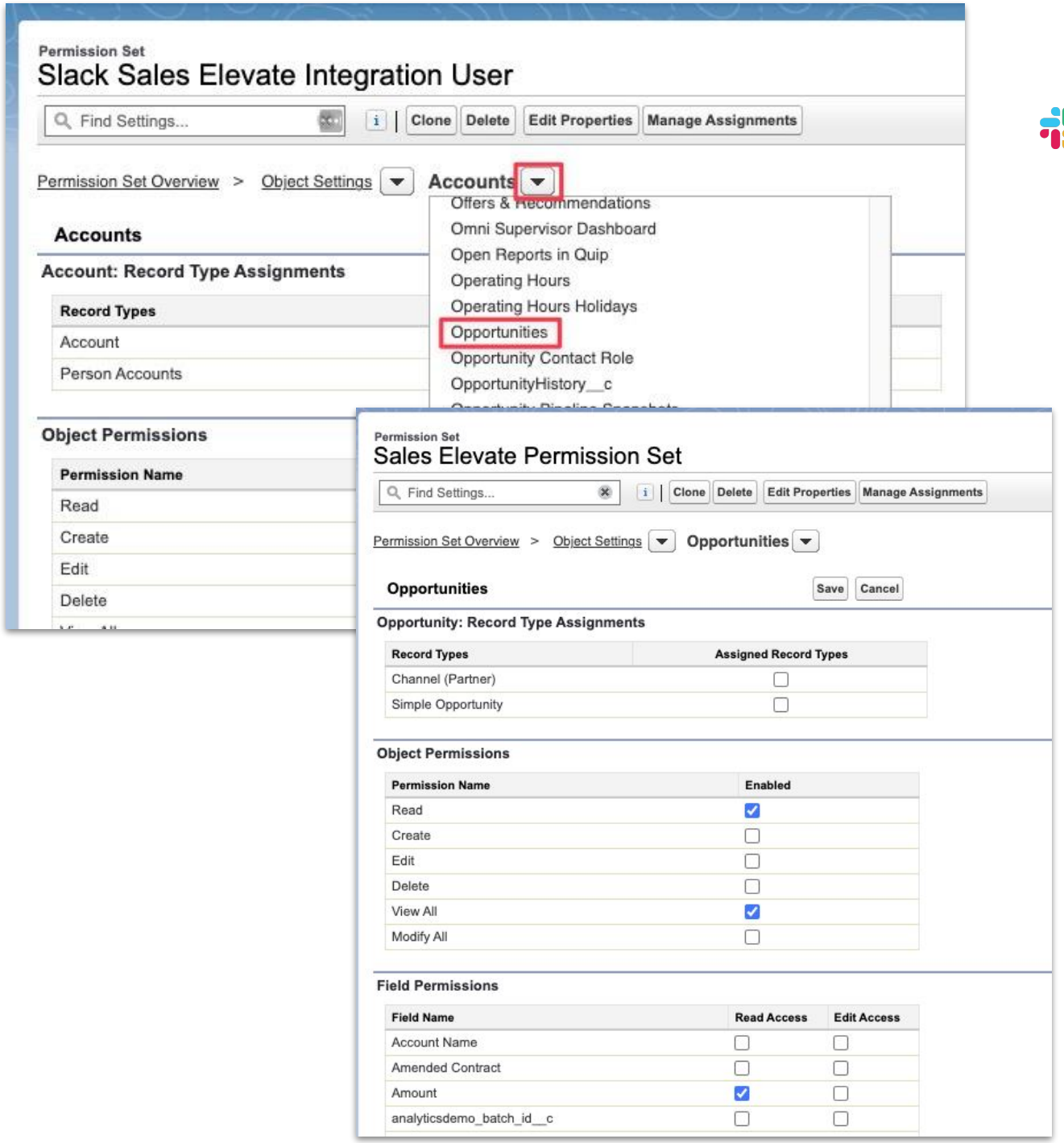
# Assign Opportunities Permissions

Click on the dropdown icon

Select **Opportunities**

- Click **Edit**
- Under **Object Permissions**, select **Read** & **View All**
- Under **Field Permissions**, select **Read** access for the **Amount** and **Next Step** fields
- Click **Save**

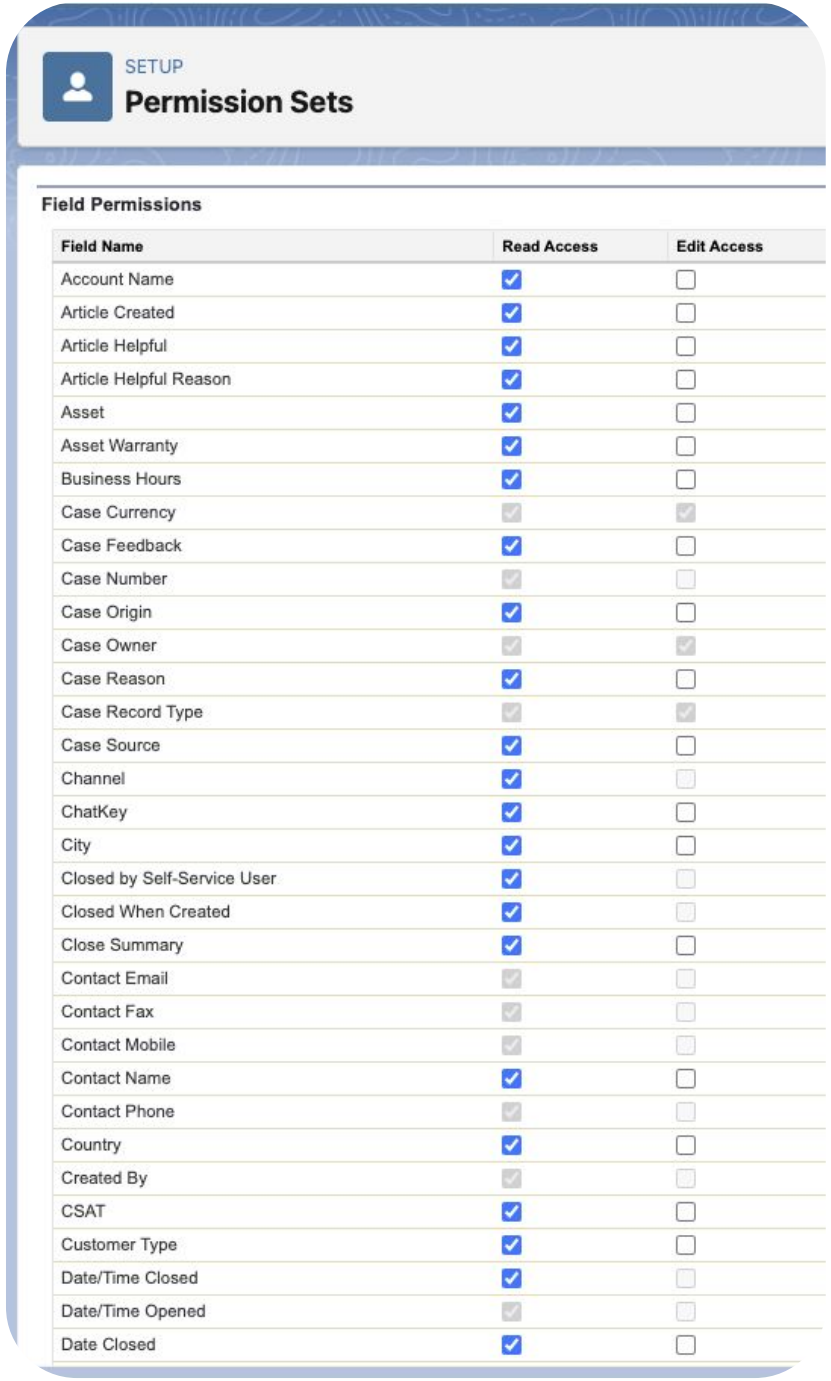
***Note**: The above are the **minimum** permissions needed Elevate to function. We recommend that customers also add **Read** access for any other opportunity fields that may be valuable for your users, leveraging the "advanced options" notification configuration in Elevate*



# Assign Permissions for Additional Objects

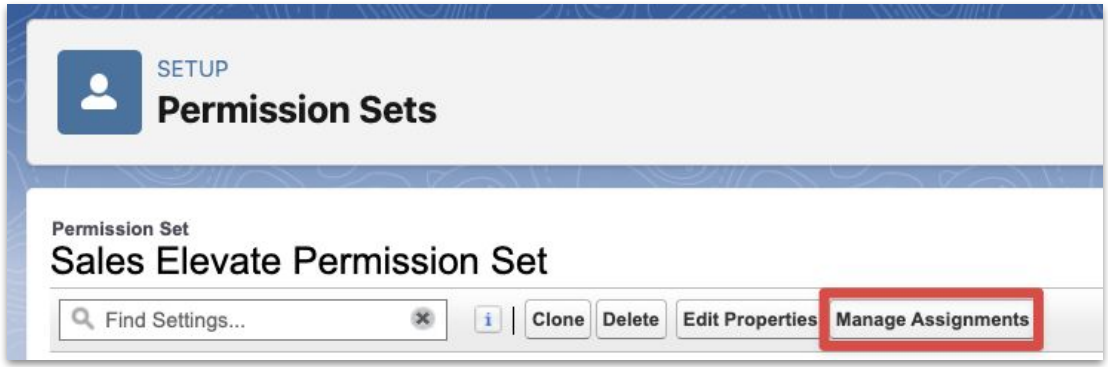
The template-based notifications in Sales Elevate are driven by the Opportunity object and a limited set of fields (described on the preceding slides)

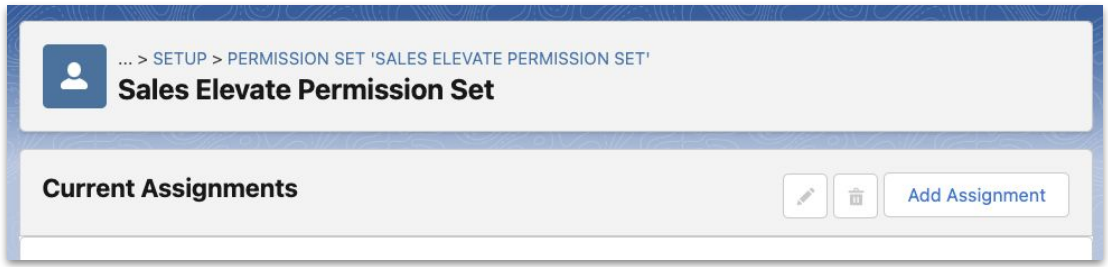
To unlock the full power of Sales Elevate, consider adding **Read** access for additional fields on all of your objects to power custom notification types in Sales Elevate

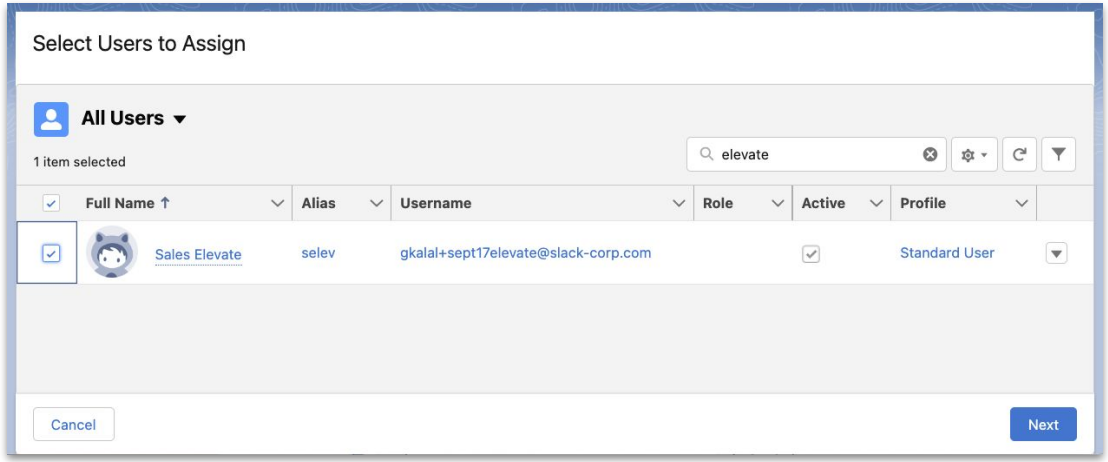


# Assign Permission Set

- Select **Manage Assignments**
- Click the **Add Assignment** button
- Assign the permission set to your integration user
- Click **Next** and **Assign**



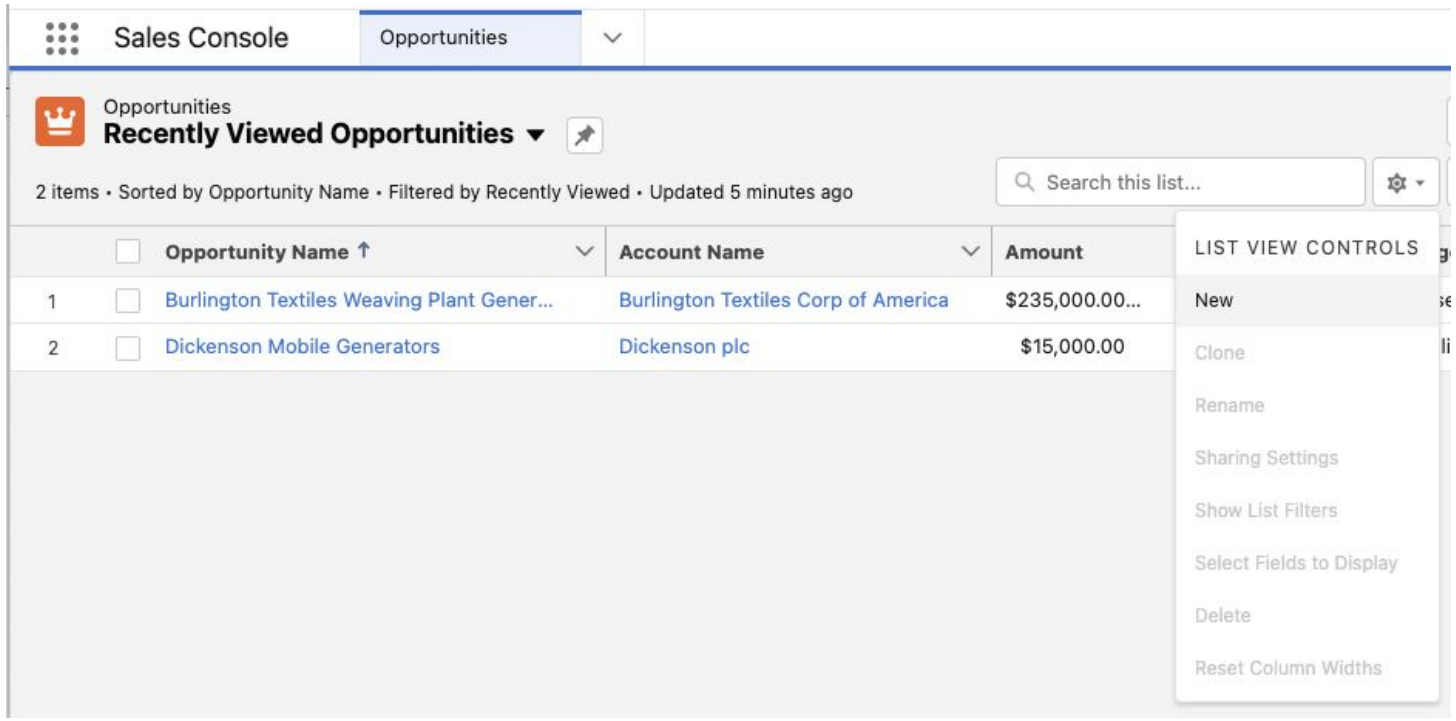



# Create Opportunity List Views

Opportunity Editing is powered by **List Views**

To make it easy for end users to get started, we recommend creating up to 5 default list views.

If you currently don't have list views, instructions for how to set them up are here



# Connecting Slack to Salesforce



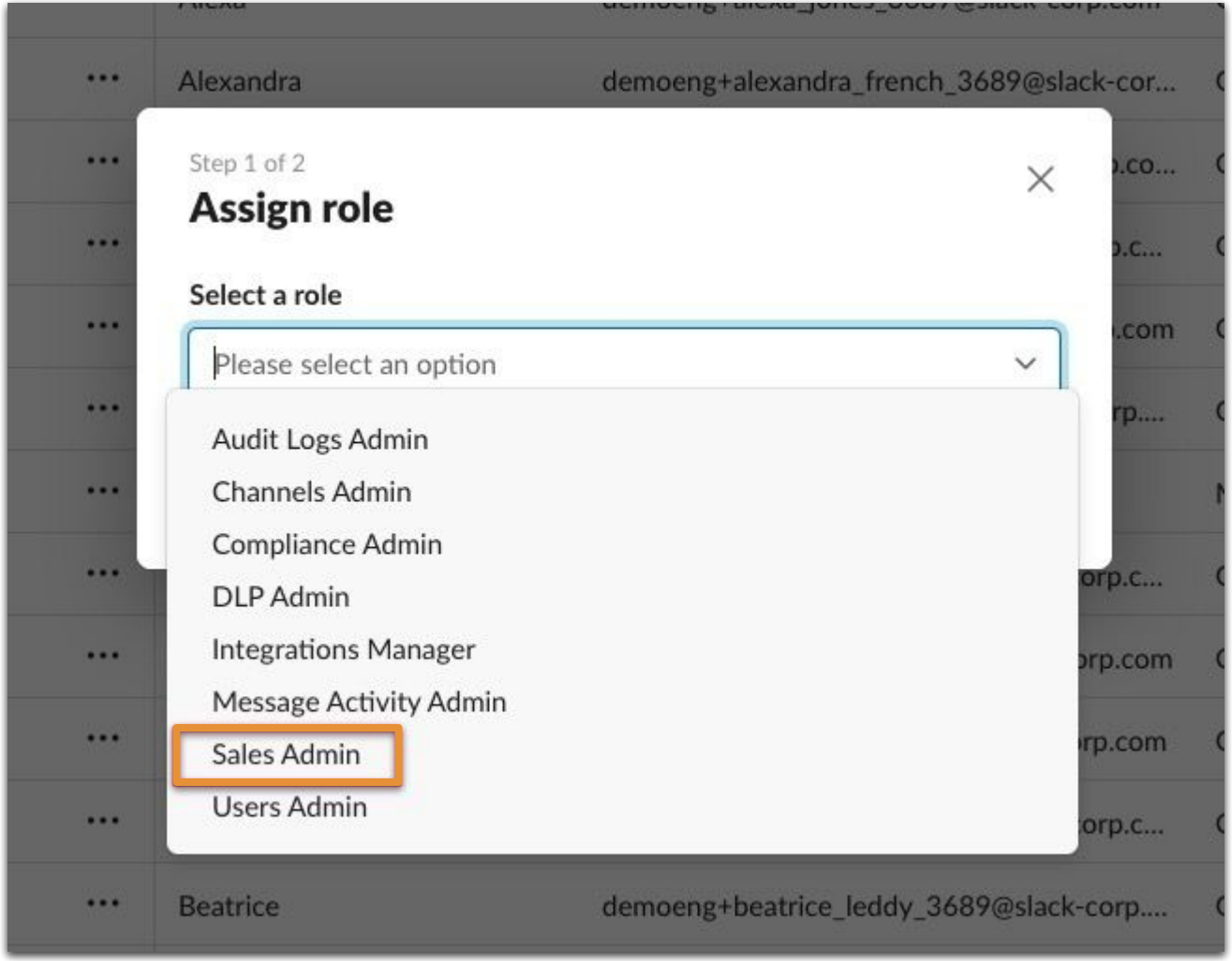
# Assign the Sales Admin Role

To configure Sales Elevate, you'll need the **Sales Admin** role in Slack.

Assign this role to yourself, or ask your Slack Org Owner or Admin to log into Slack and assign the role to you (detailed instructions here)

*Grid: Tools & Settings > Organization Settings > People > Manage Permissions*

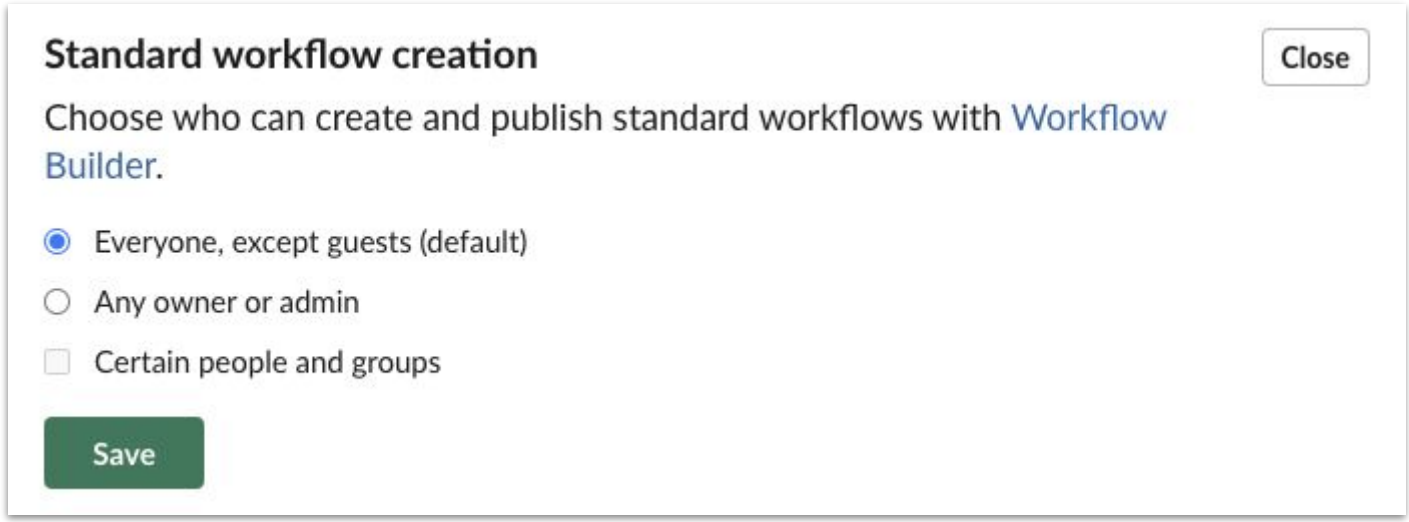
*Non-Grid: Tools & Settings > Workspace Settings > Manage Permissions (in the left sidebar)*



# Ensure Workflow Builder is Active

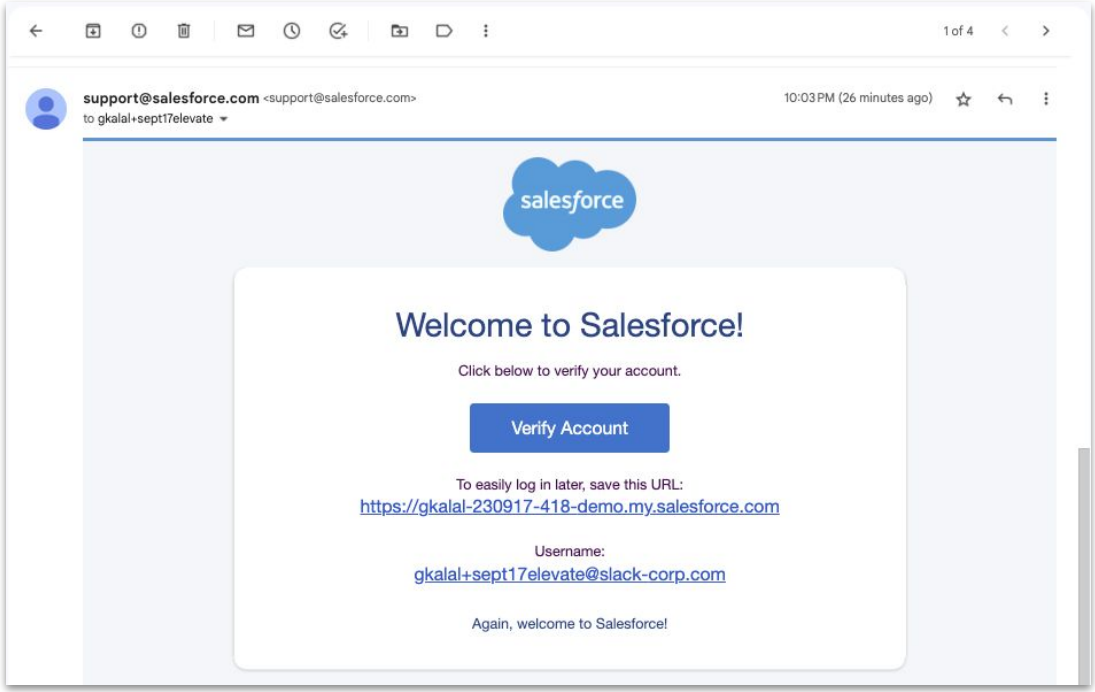
Sales Elevate leverages Slack's workflow builder to power real-time notifications

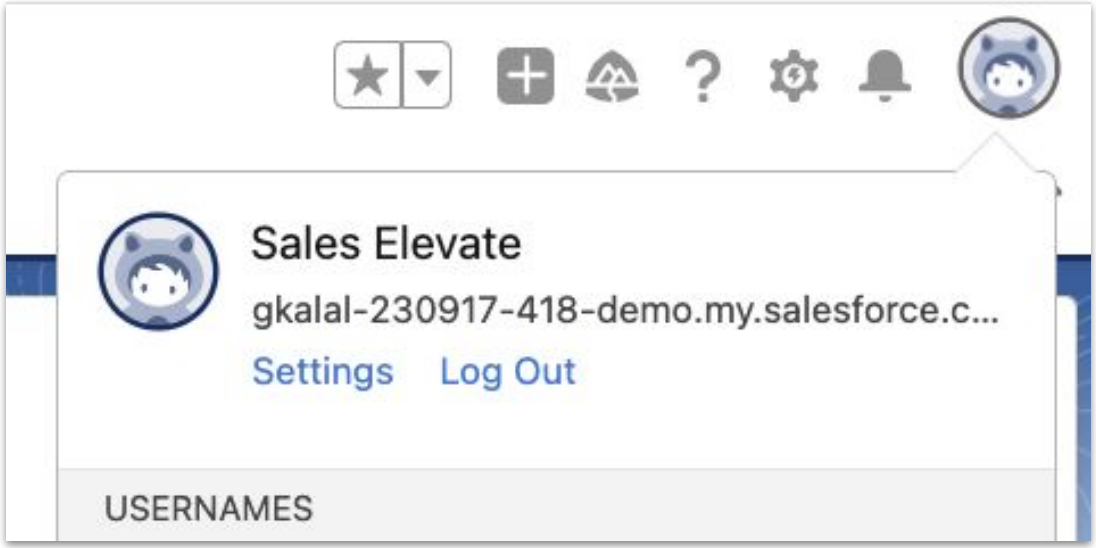
Ensure that your Elevate users have access to create Standard workflows, which they'll need in order to configure their notifications (detailed steps here)



# Log into Salesforce as the Integration User

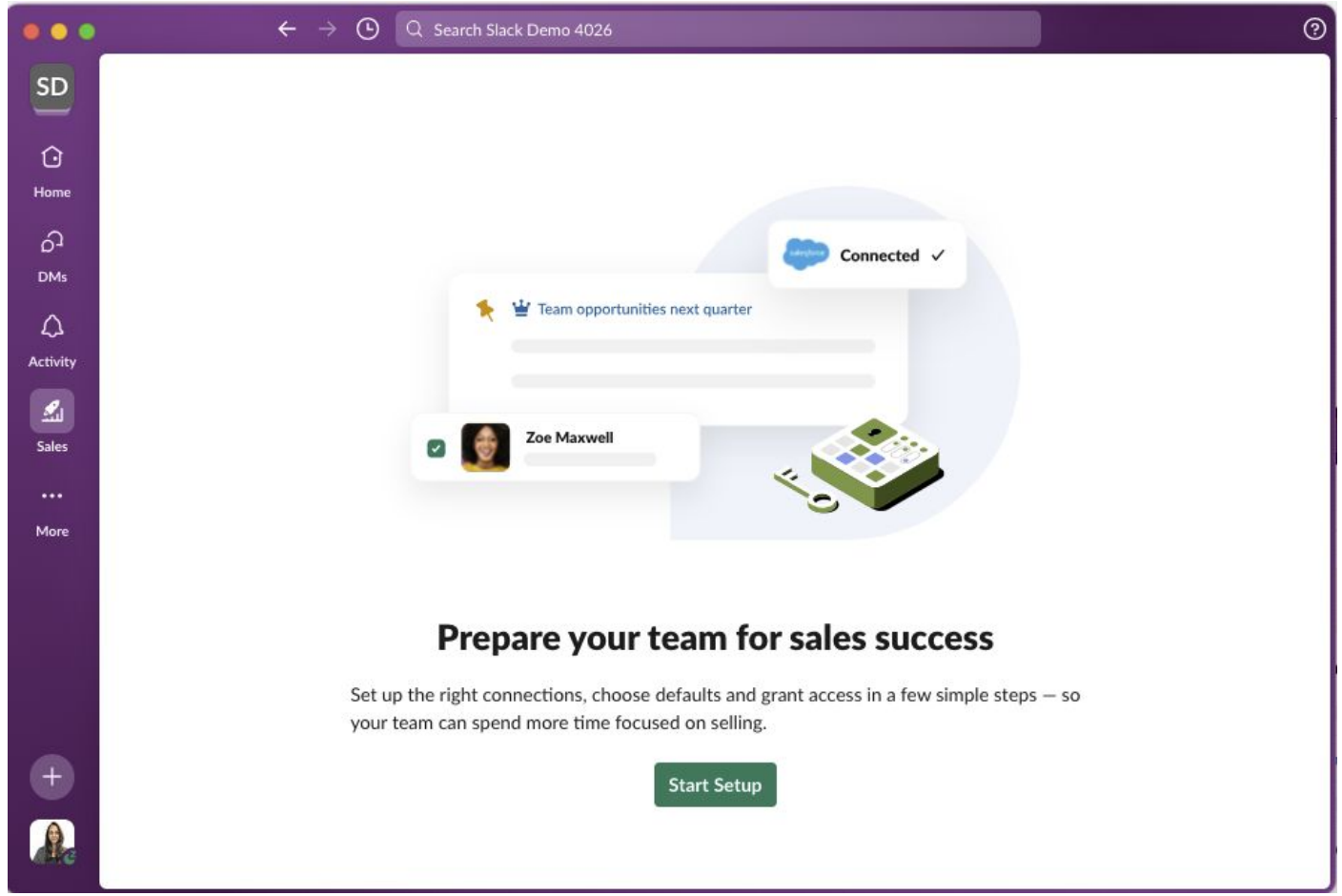
- Log out of your administrator account
- You should have received an **Email Invitation** for the notification user. Click the **Verify Account** button and select a password
- Log into Salesforce as the integration user



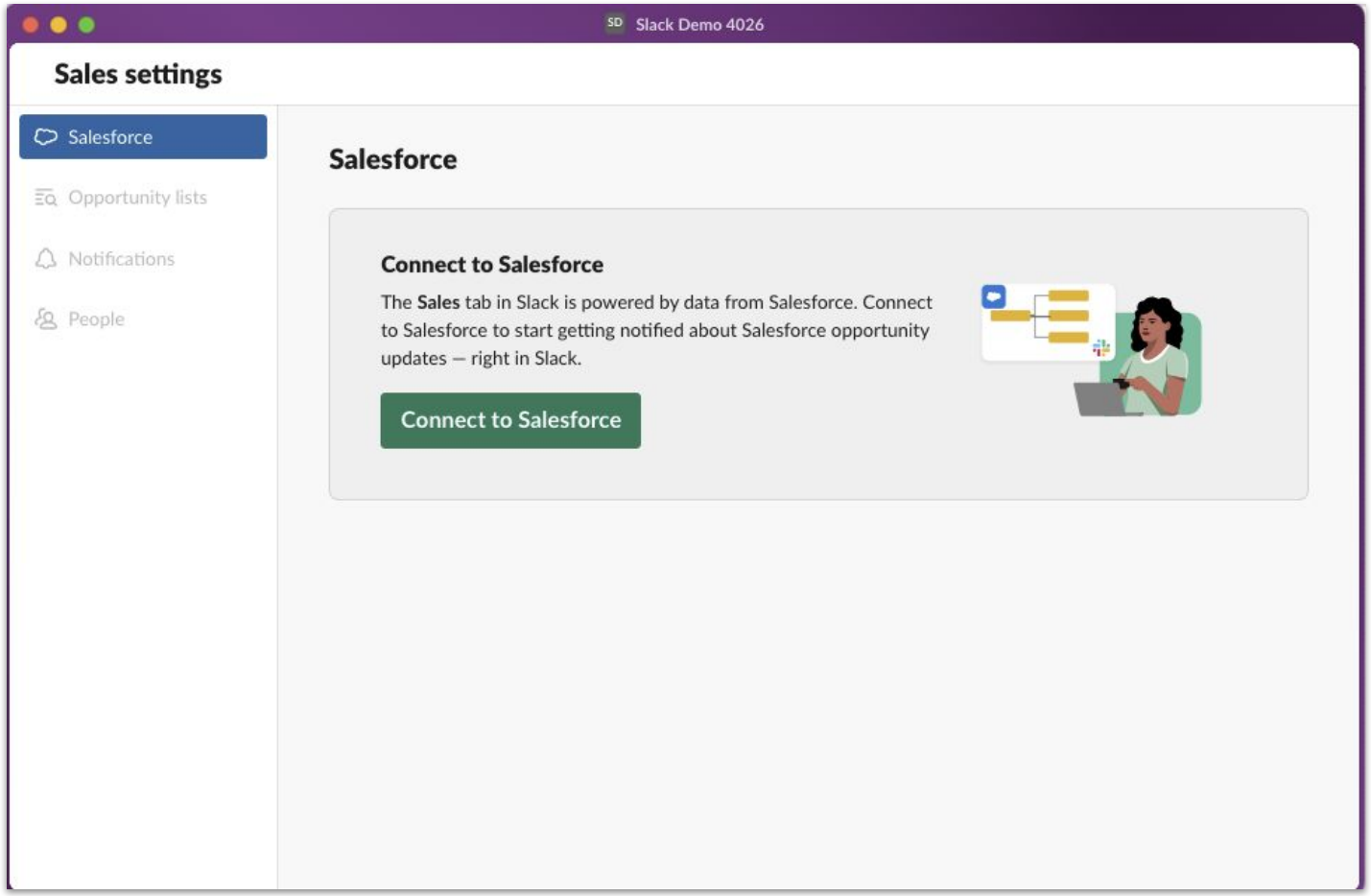
# Connecting to Salesforce

Navigate to Sales home and click **“Start Setup.”**



# Connecting to Salesforce

Click “**Connect to Salesforce.**”



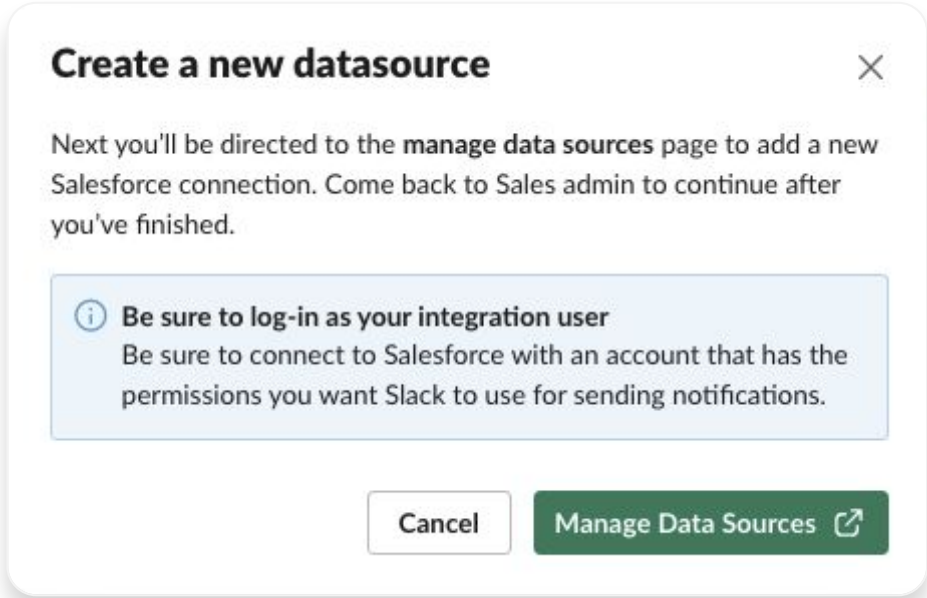
# Connecting to Salesforce

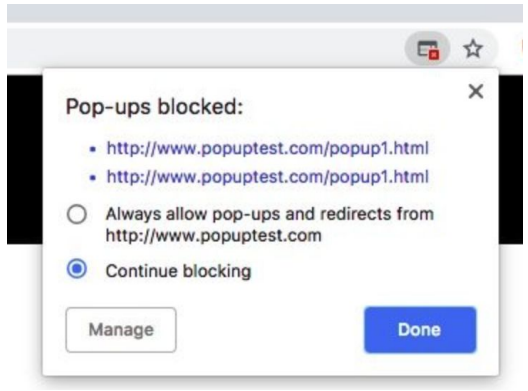
## Setting up a new Salesforce integration

The next screen will remind you to use the Integration User that was created earlier.

Click **“Manage Integrations”**

Note: If you are accessing Slack from a web browser, like Google Chrome, and are having issues proceeding, check your main Slack window for the icon next to your URL. If you find that your browser is blocking pop-ups, select “Always allow”



# Connecting to Salesforce

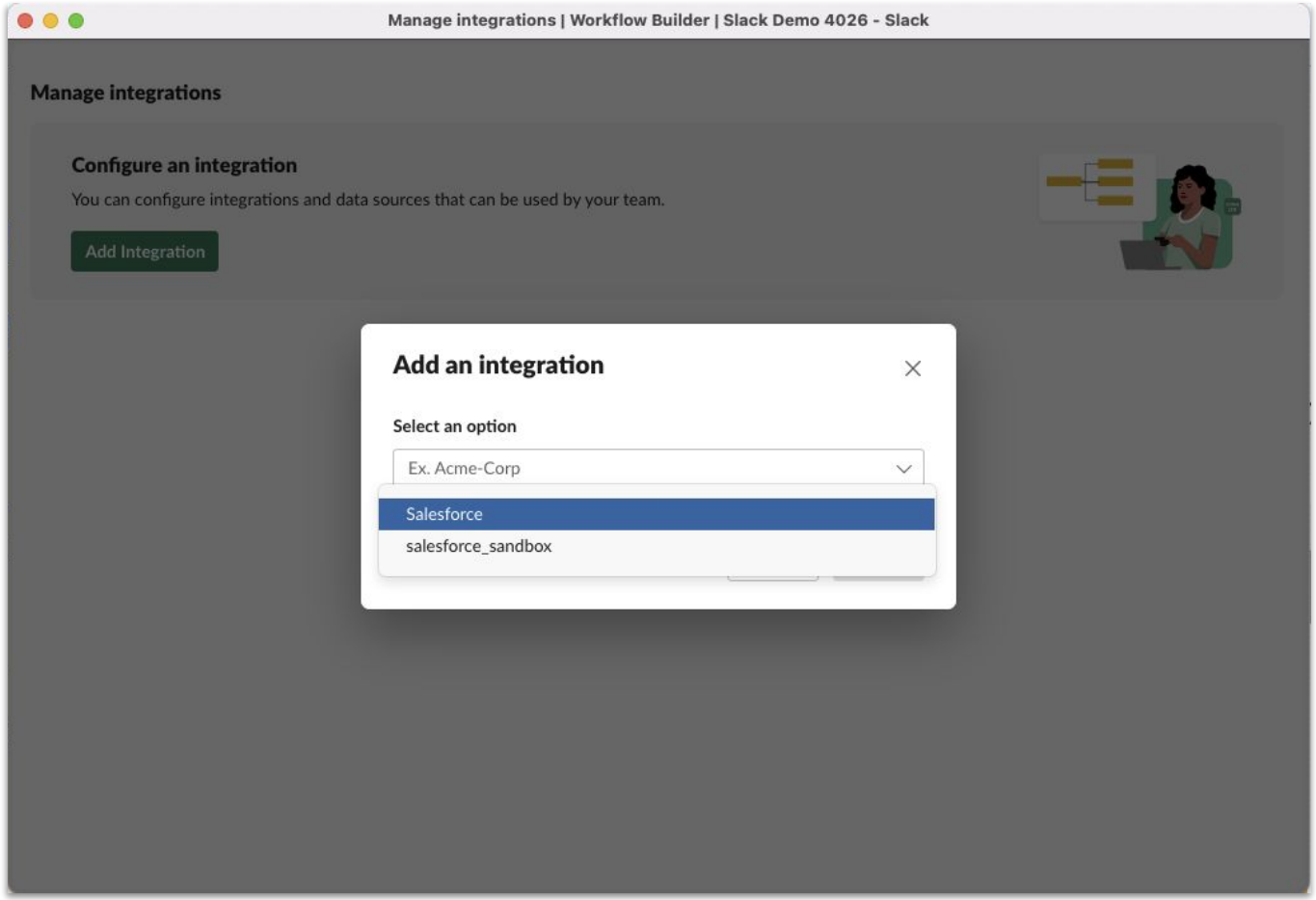
Click the **Add Integration** button

Select **Salesforce**

Click **Connect**.

Be sure to pick the right environment:

- **Salesforce:** For Production instances *(default)*
- **Salesforce Sandbox:** For Sandbox or test environments *(e.g. test.salesforce.com)*



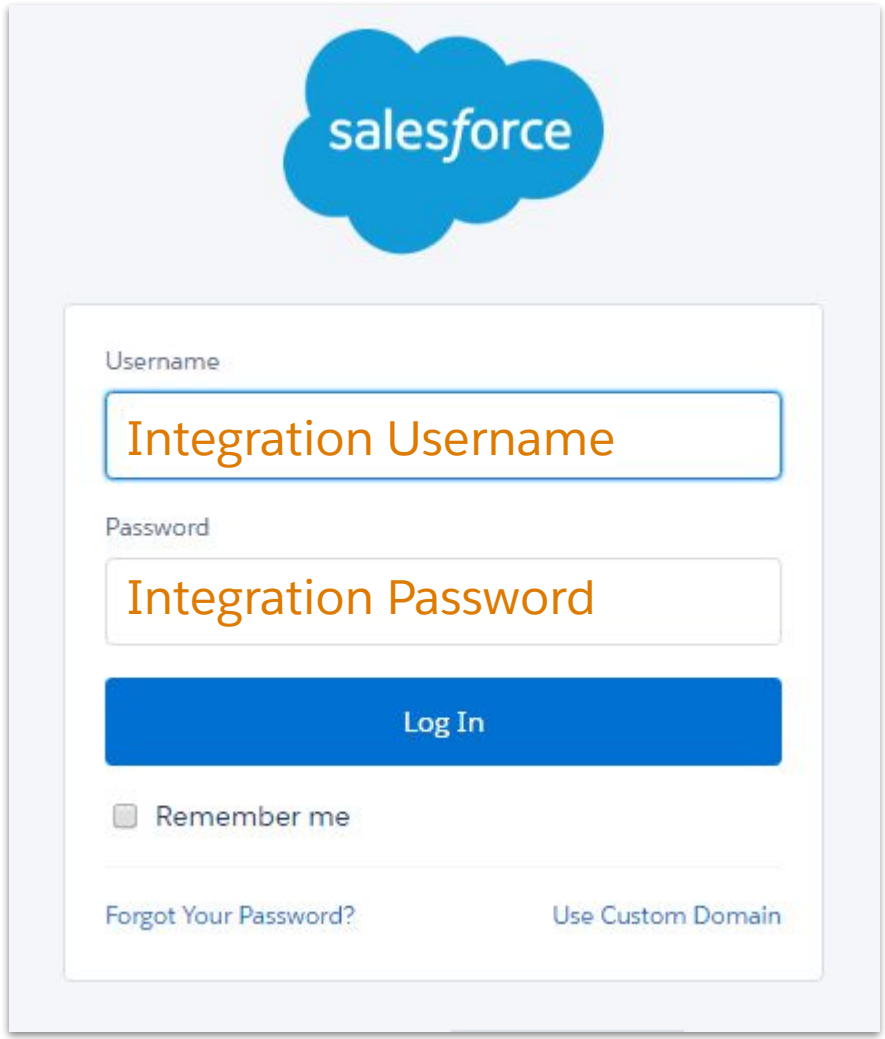
# Connecting to Salesforce

It not already logged in, a Salesforce login window will appear

**Important:**

Make sure you sign in as the **Integration User**

Click **Log In**

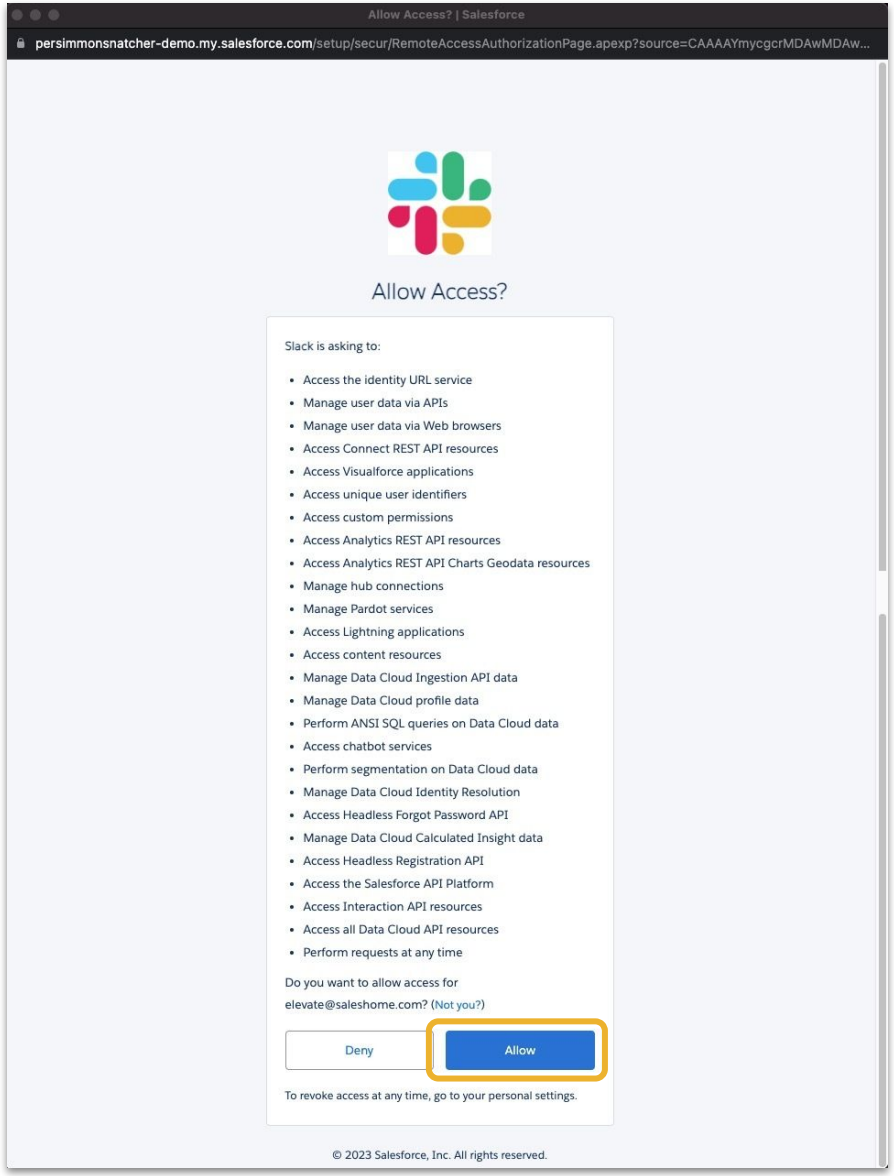


# Connecting to Salesforce

Once successfully logged into Salesforce, click **Allow**

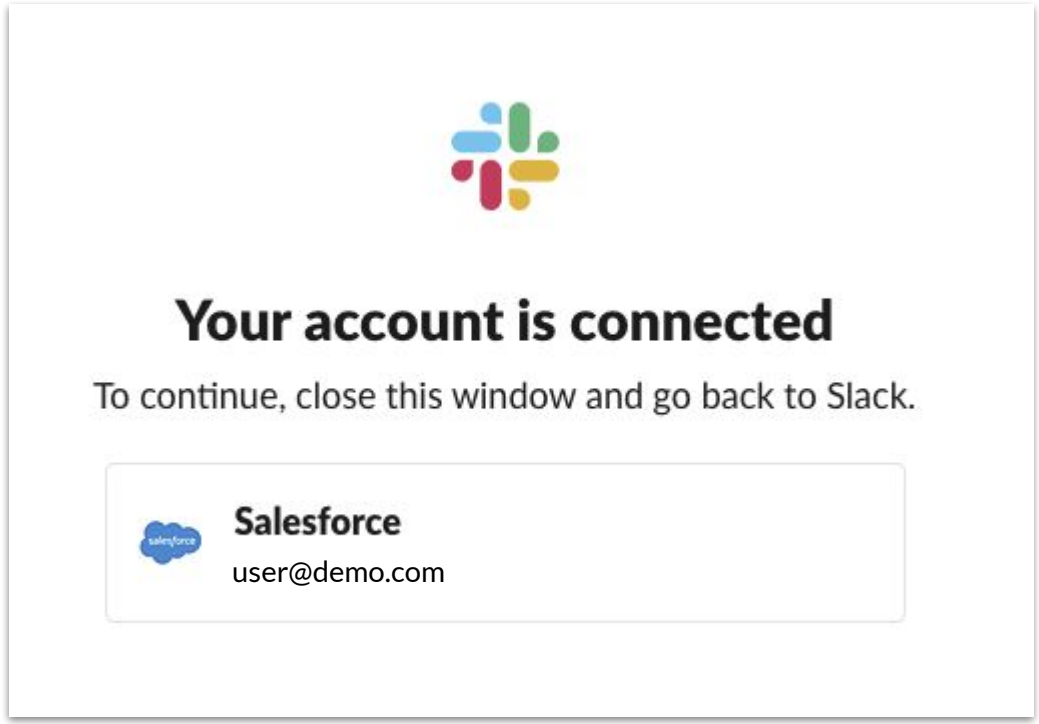
**Important:**
Please check that the username listed is that of the **Integration User**

If not, click **Not you?** and log into Salesforce as the **Integration User**



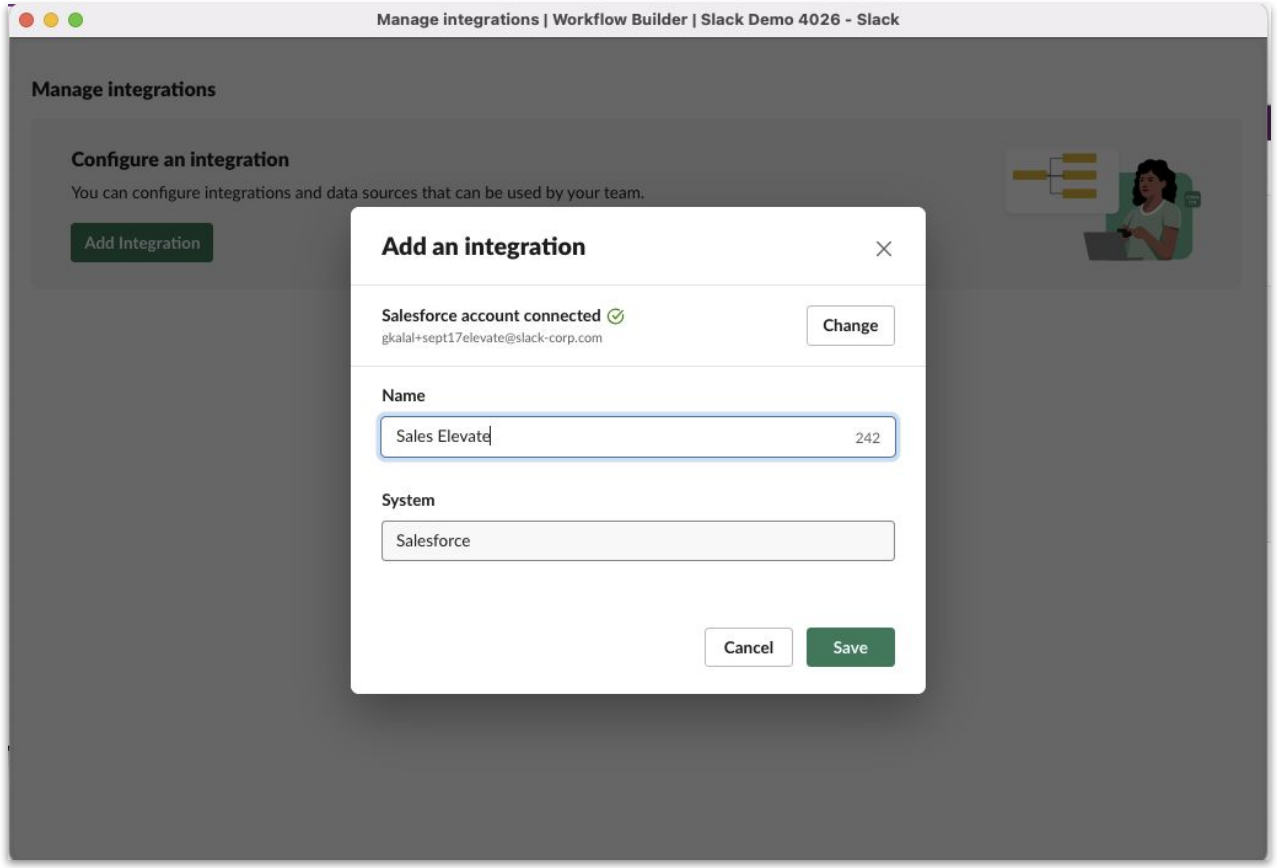
# Connecting to Salesforce

Close the browser window and return to Slack



# Connecting to Salesforce

Once connected to your data source, give your source a **Name** and then click **Save**

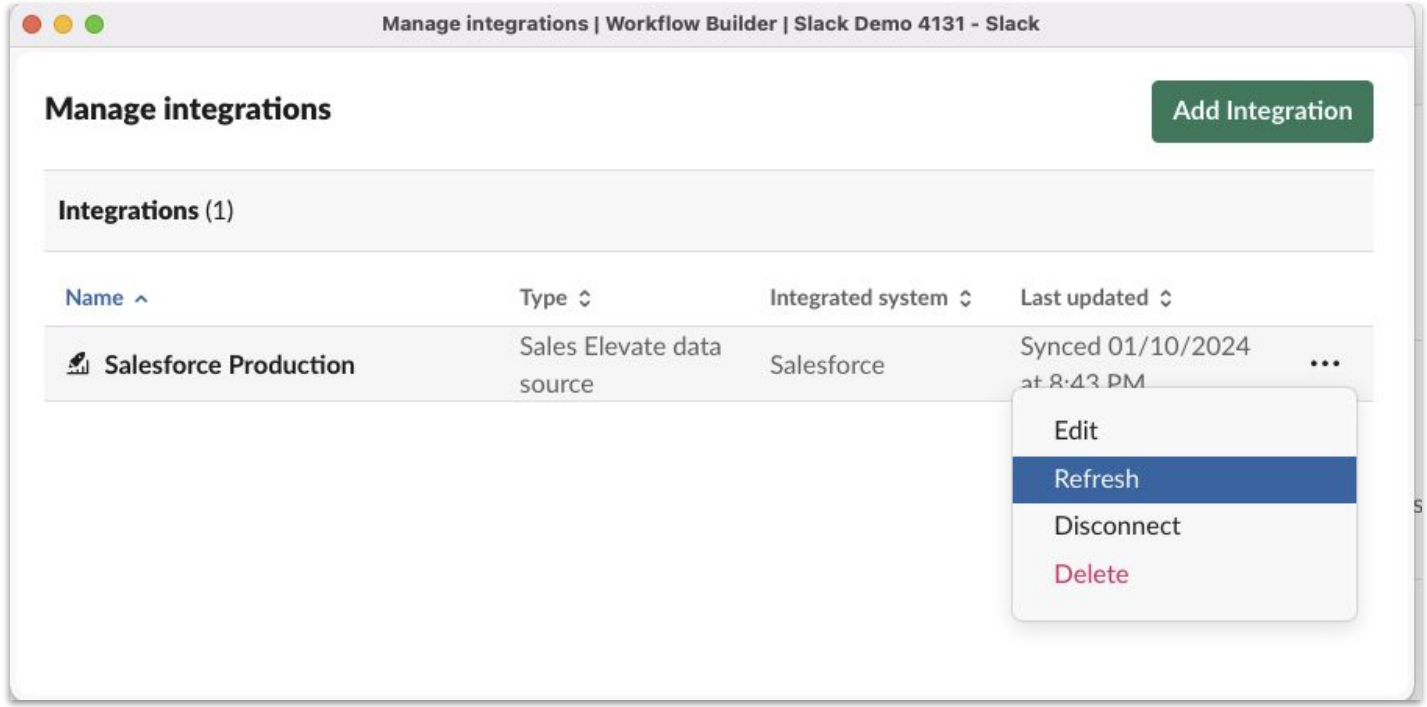


# Connecting to Salesforce

At any time, you can return to the **Manage Integrations page** via **Sales Admin** to add, remove or edit connected integrations.

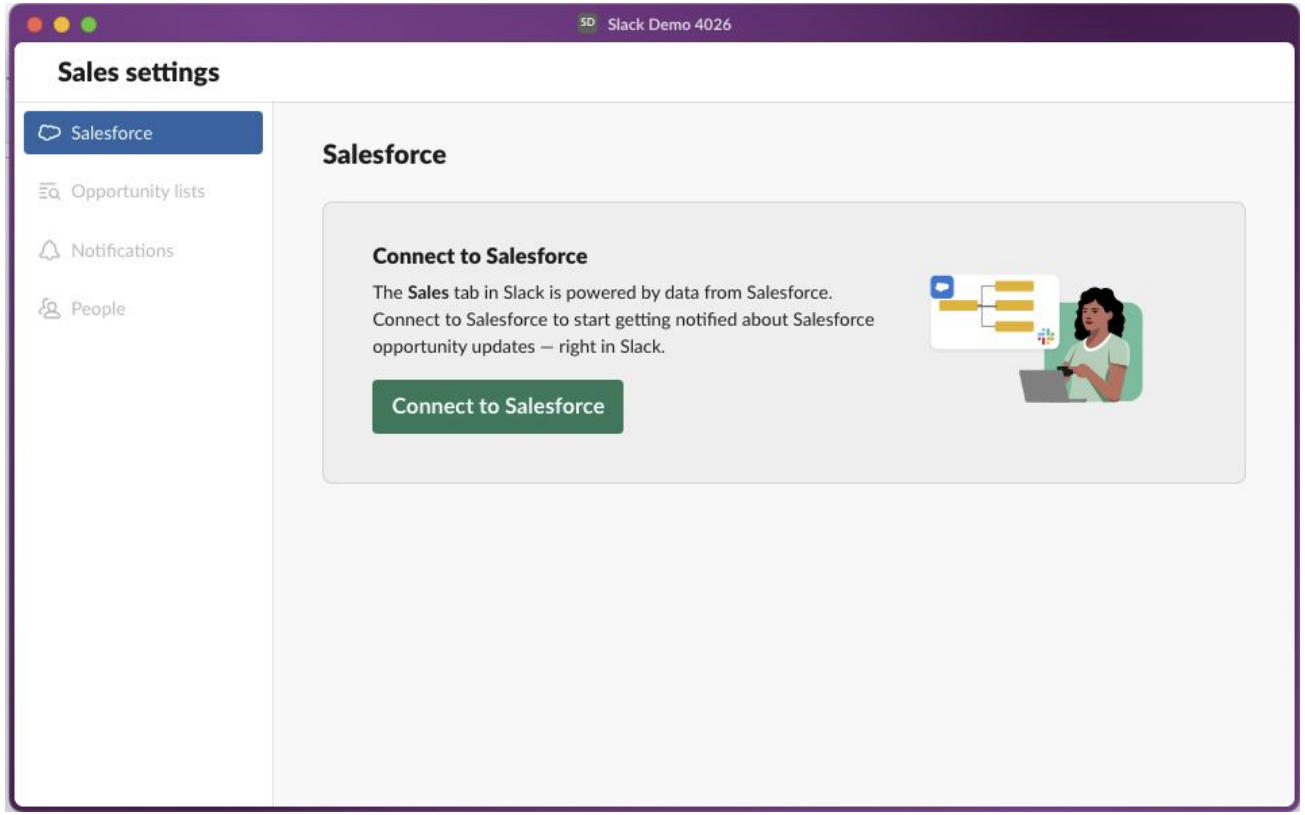
Use the **Refresh** button to update the available objects for notifications.

For example, if you create a new object in Salesforce or adjust the permission set for your integration user in the future, refresh to make those objects available in Slack notifications



# Connecting to Salesforce

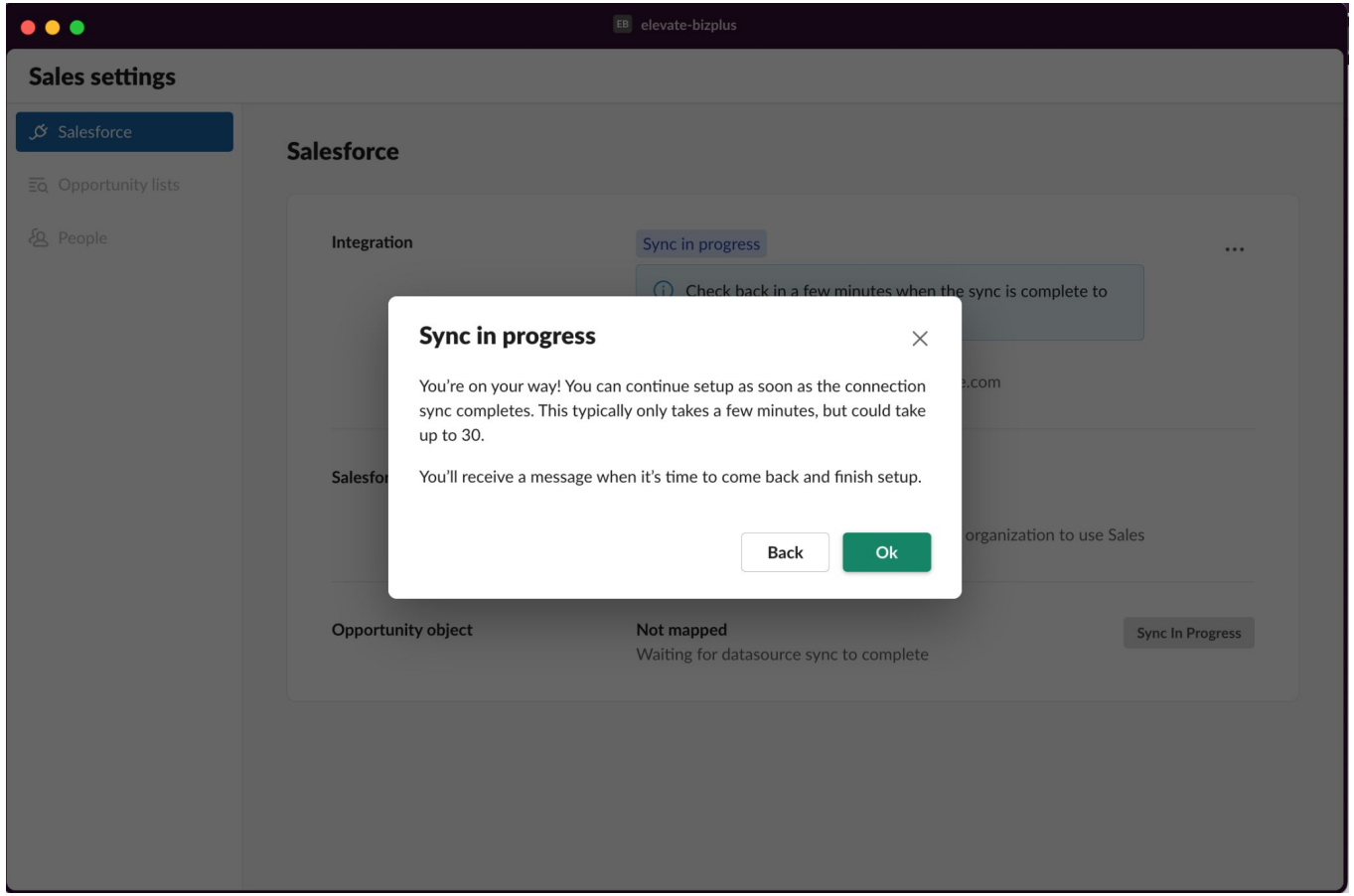
Back in the Sales settings window, click **Connect to Salesforce** again



# Complete Schema Synch

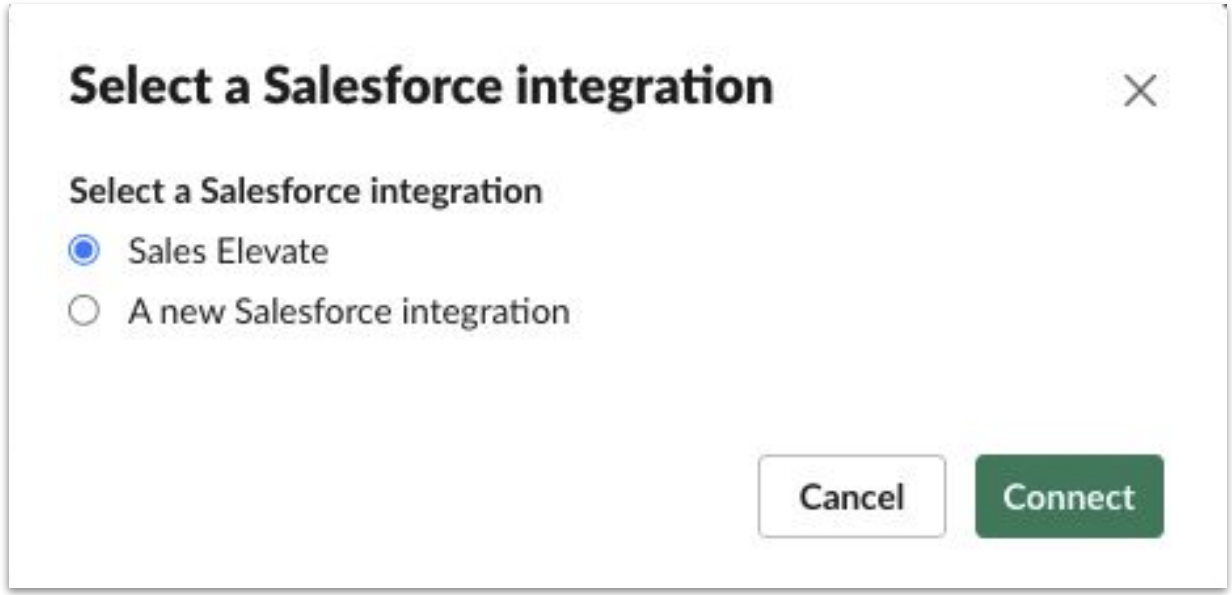
You'll then be prompted to allow time for Sales Elevate to synchronize with your Salesforce data schema

This should normally only take a few minutes, but may be up to 30.



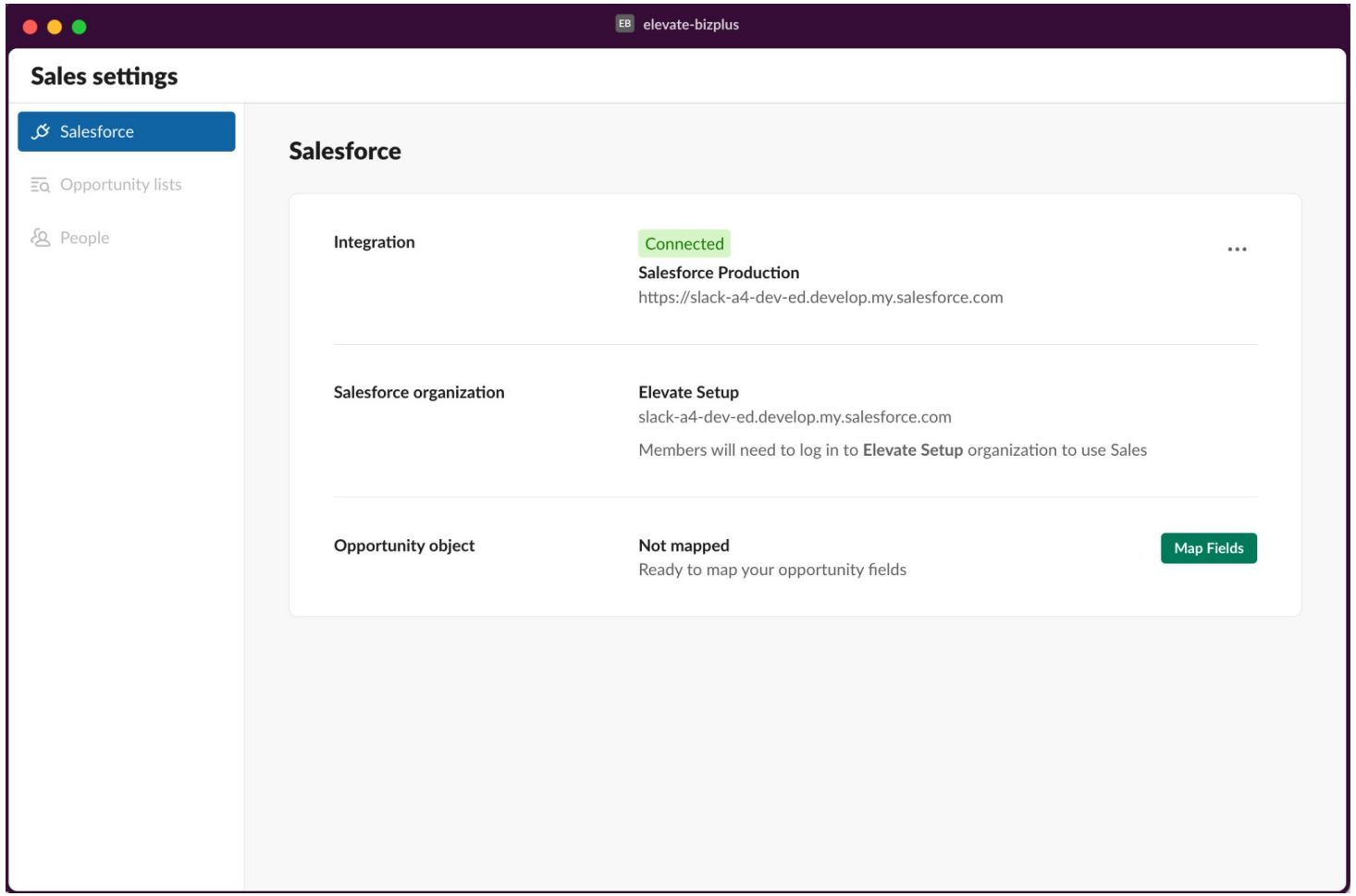
# Connecting to Salesforce

Select the integration you configured



# Complete Schema Synch

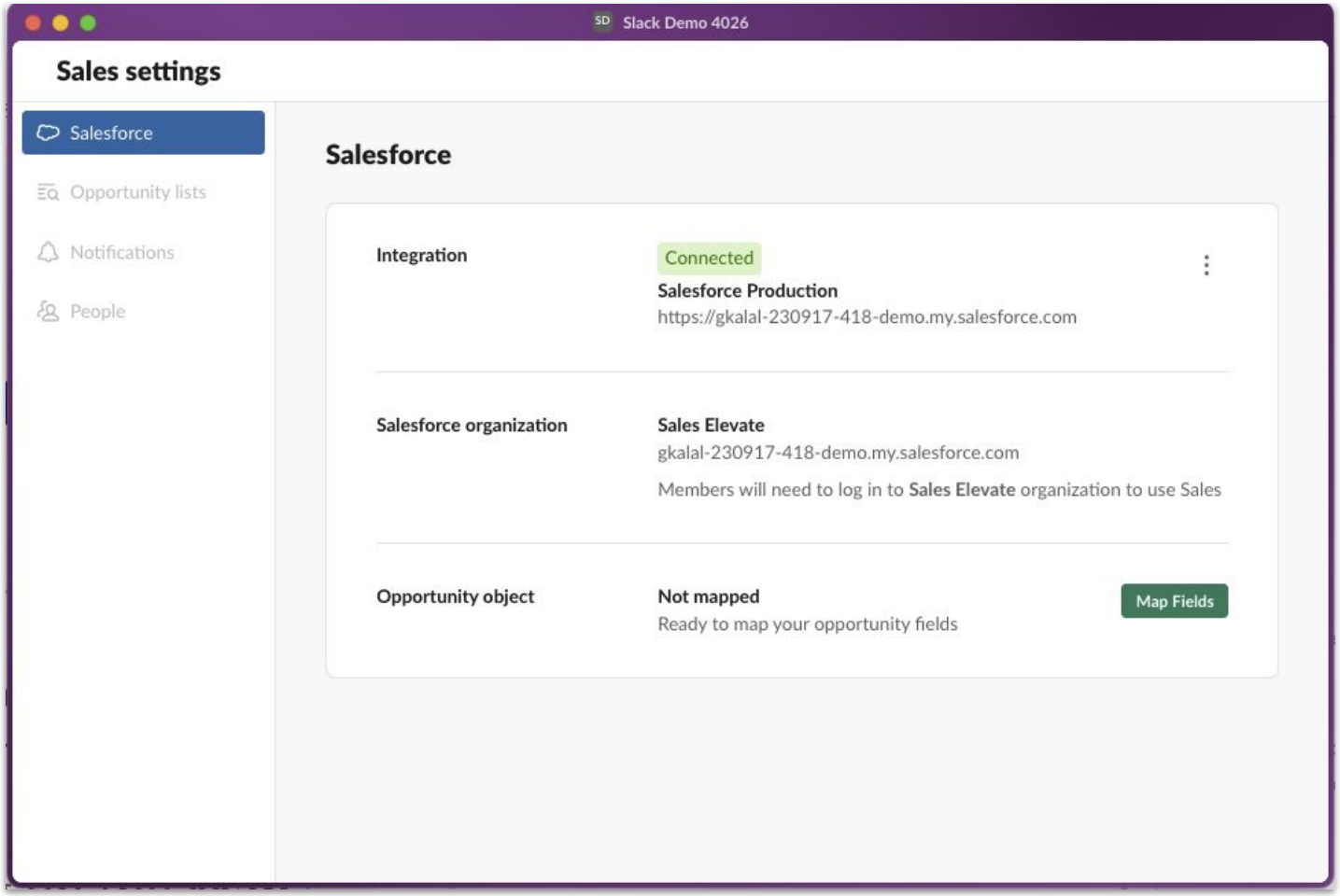
Once synchronization is complete, your integration will update to display “Connected” in green



# Mapping Opportunity Fields

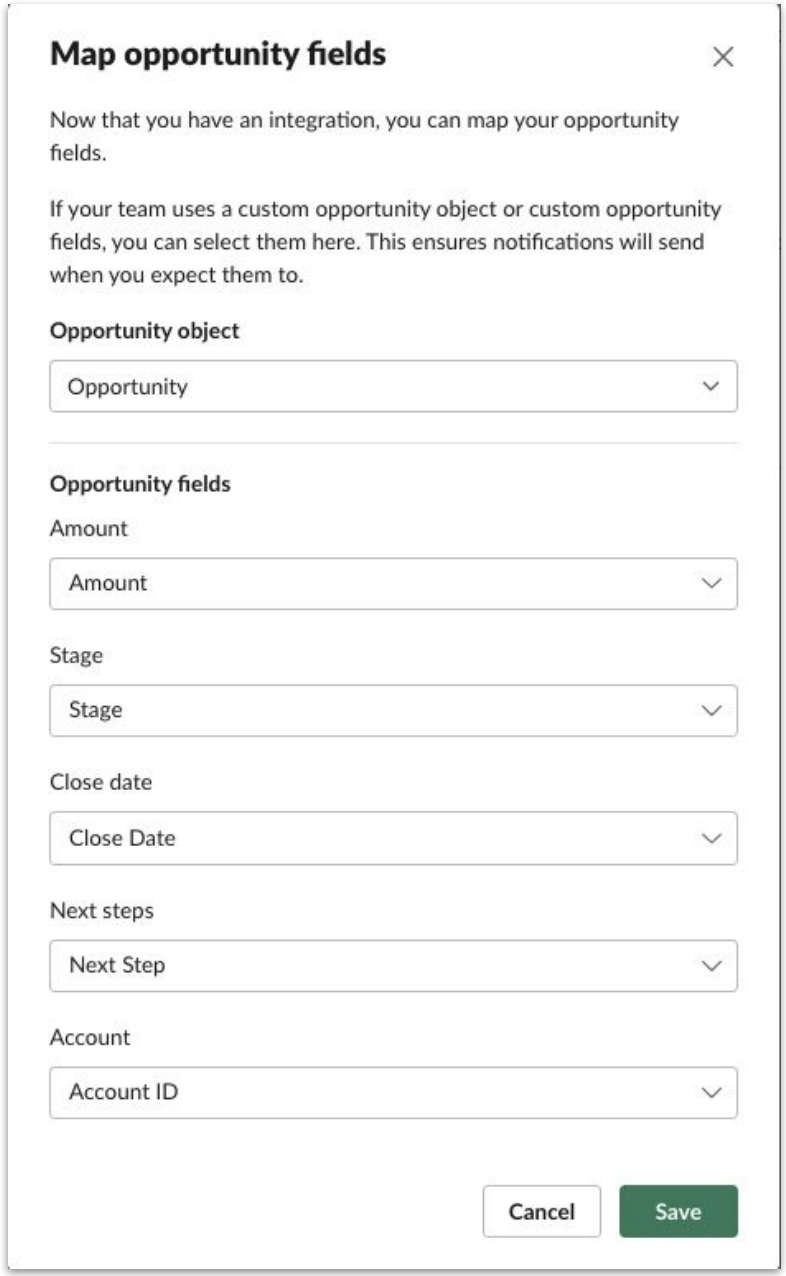
Once your new data source has been synced for the first time, you can map your opportunity fields

Start by clicking on the **Map Fields** button.



# Mapping Opportunity Fields

Select the object you use to manage opportunities, as well as the relevant fields to power notifications in Slack



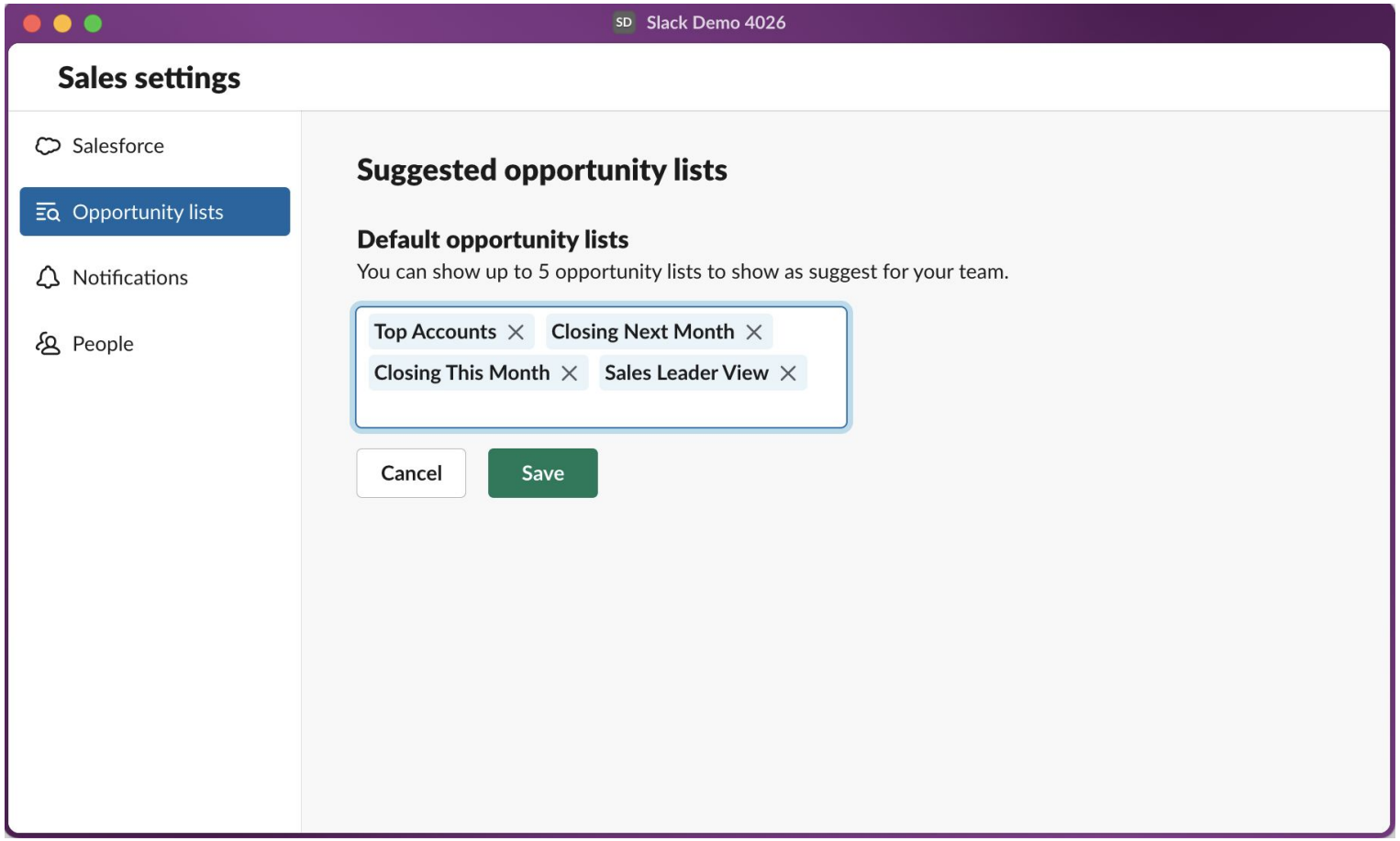
# Managing Suggested Lists



# Managing Suggested Lists

Within Sales settings, navigate to **Opportunity lists** to configure default lists for your sales team

Enter in any opportunity list views you would like to be available by default



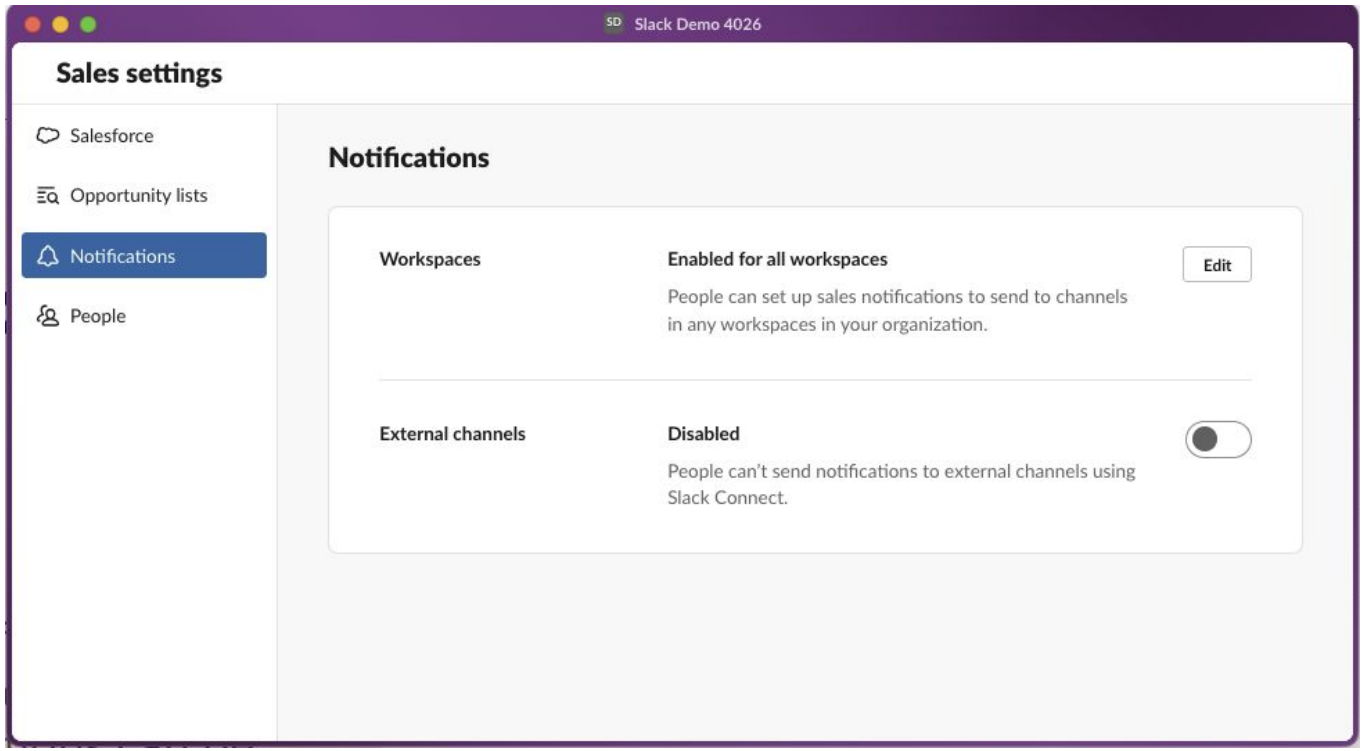
# Notification Settings



# Notification Settings

Review your notification settings to choose which channels notifications can be sent to, and to restrict specific workspaces or channels.

By default, all workspaces are **enabled** for notifications, and Slack Connect channels are **disabled**



# Member Management

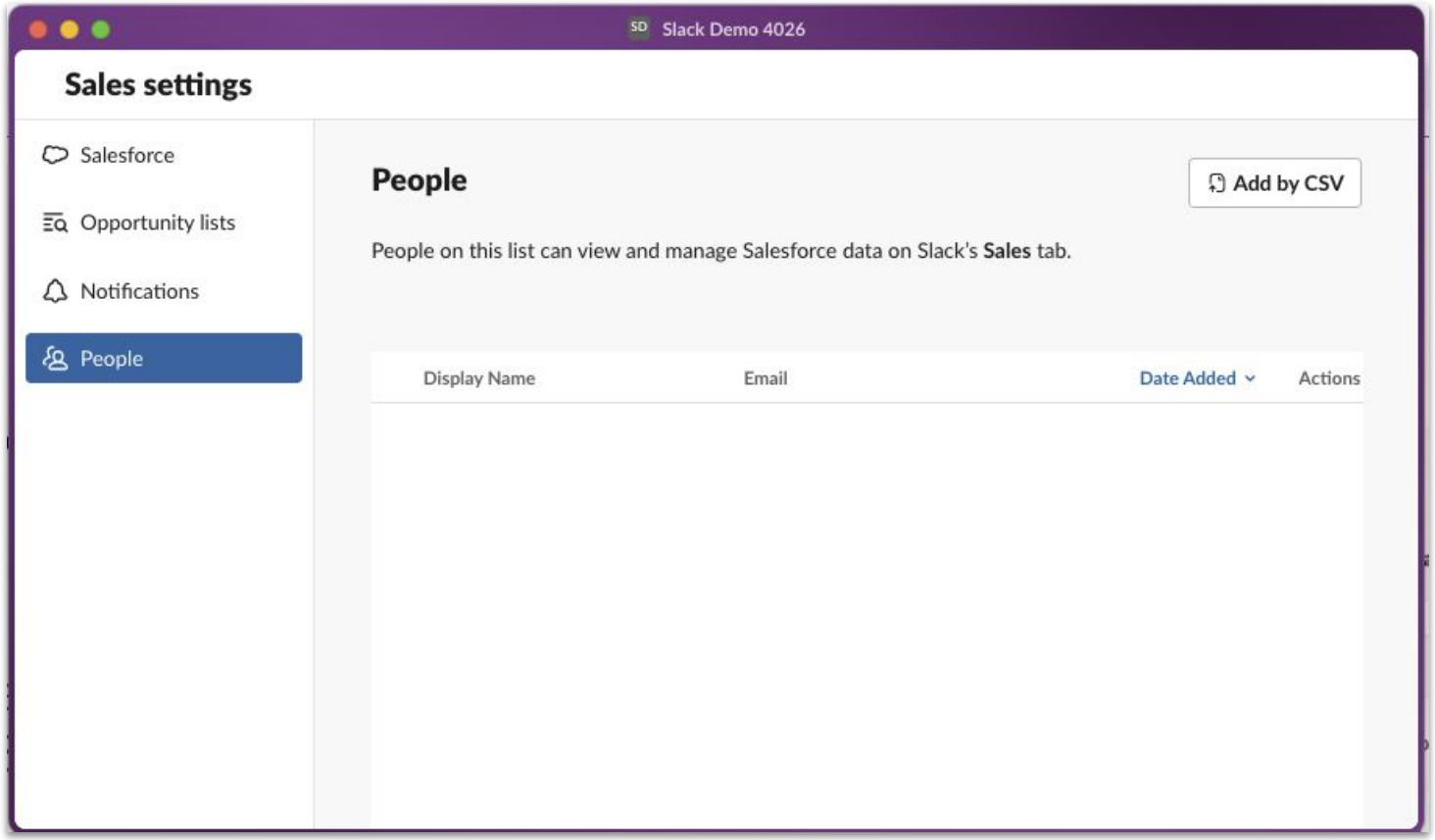


# Member Management

Add members so they are able to view and manage Salesforce data using Slack Sales Elevate.

To add people to Slack Sales Elevate, click **People** in your Sales Settings.

**Upload a CSV** of emails to allow your users to access Elevate



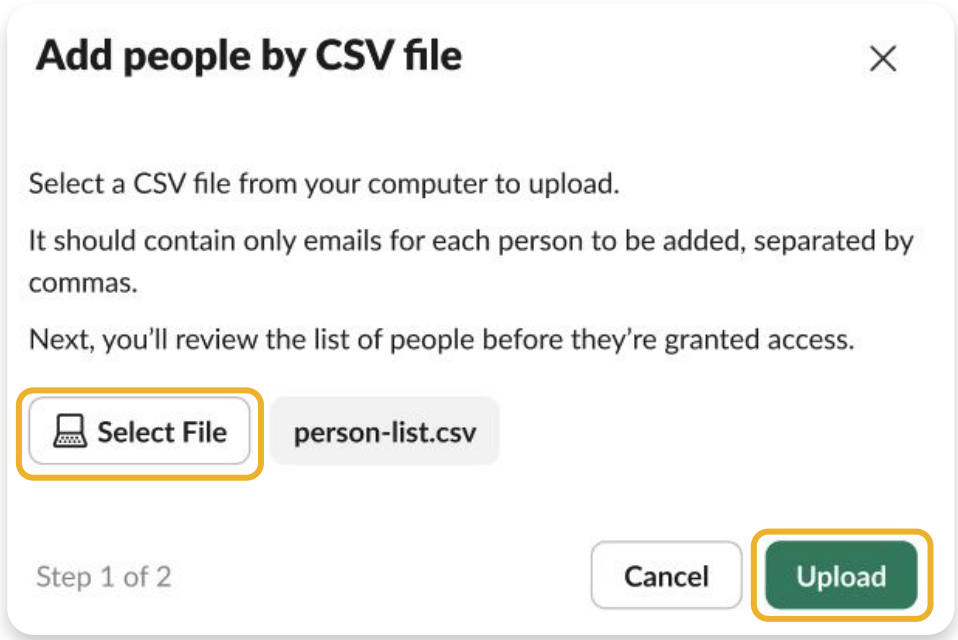
# Member Management

## Add People by CSV

Click **Add by CSV** in the top right corner.

Select the CSV file from your desktop containing the users you want to add.

Once you've selected a file, click **Upload**.




### CSV Format

- The CSV should **not** contain headers
- Only provide a list of emails separated by commas

### Example:

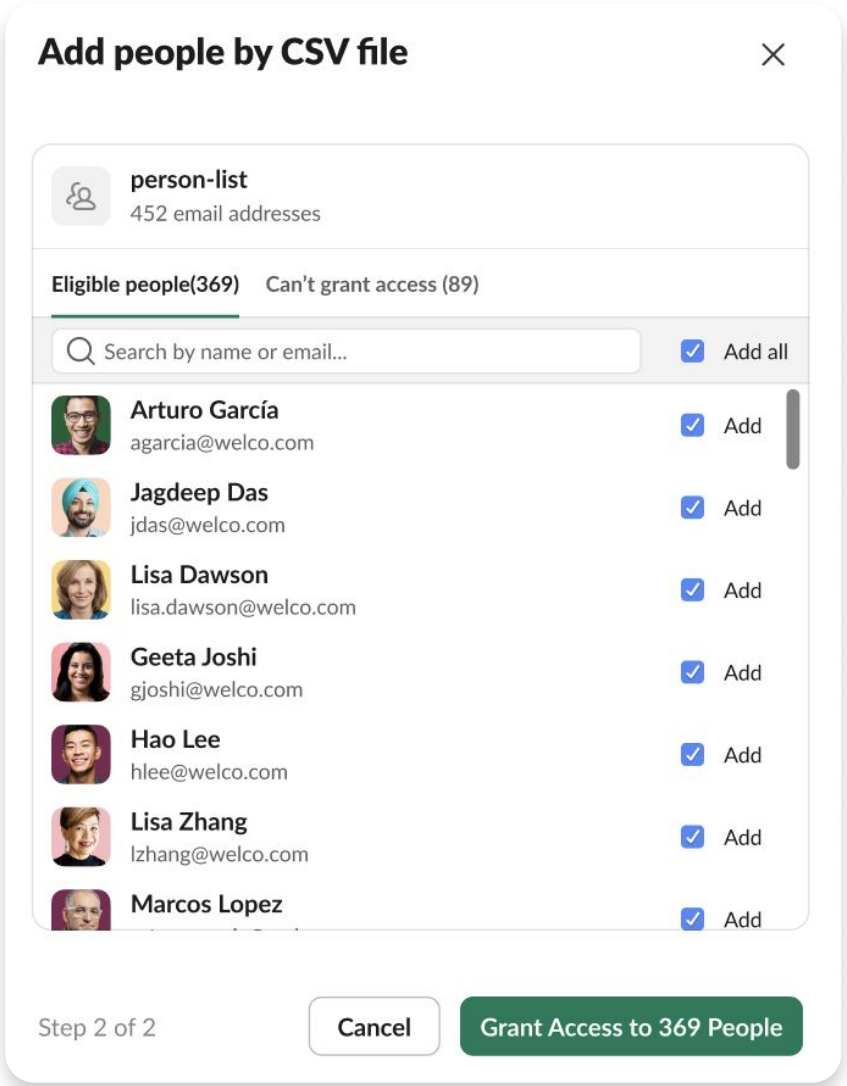
user1@slack.com, user2@slack.com, user3@slack.com

# Member Management

## Add People by CSV

Once you have uploaded your CSV, you'll see a preview of the people on your list in Slack.

Make adjustments here before **granting access**.

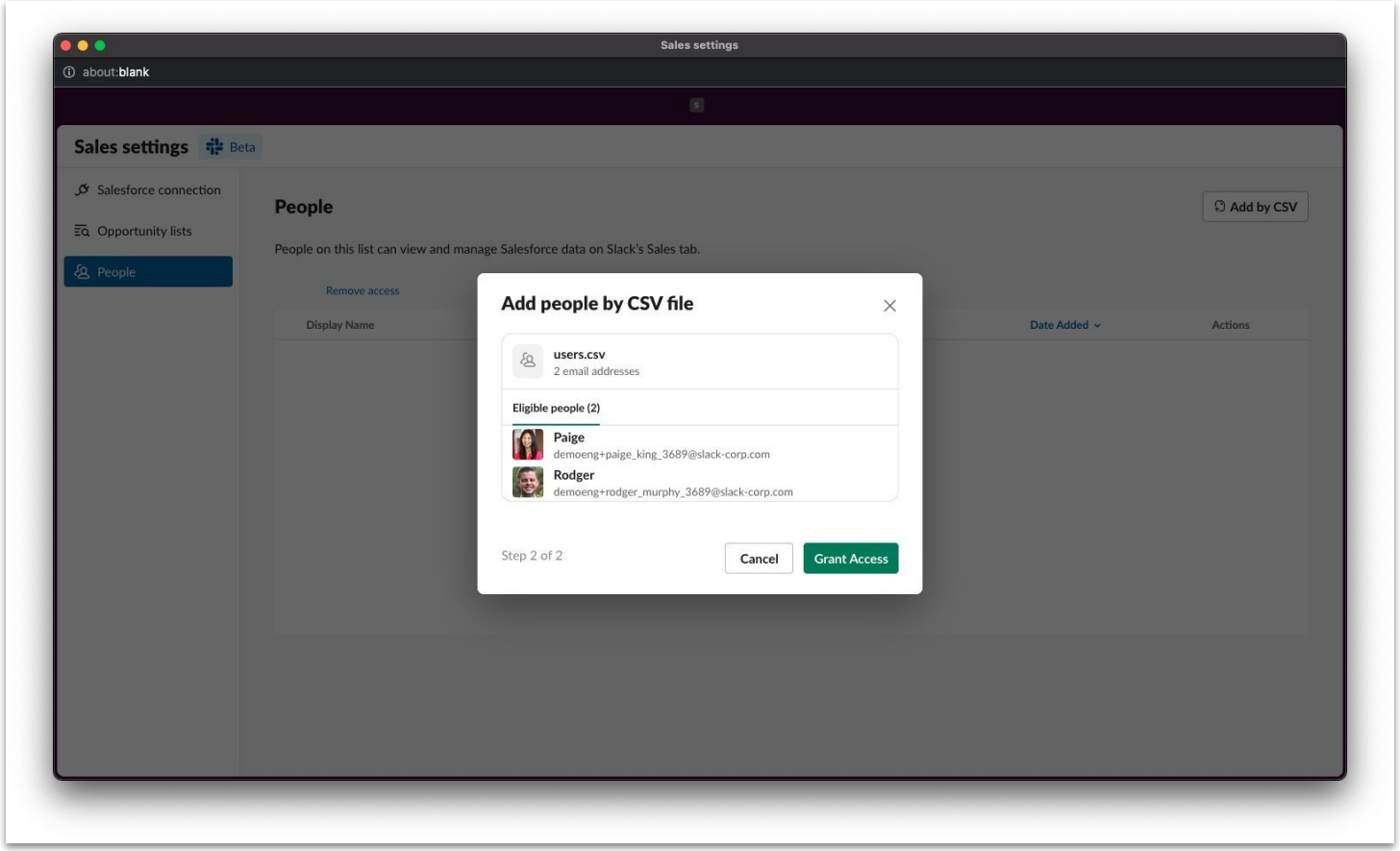


# Member Management

## Add People by CSV

You can also see if there are people on your CSV that Slack is unable to grant access to.

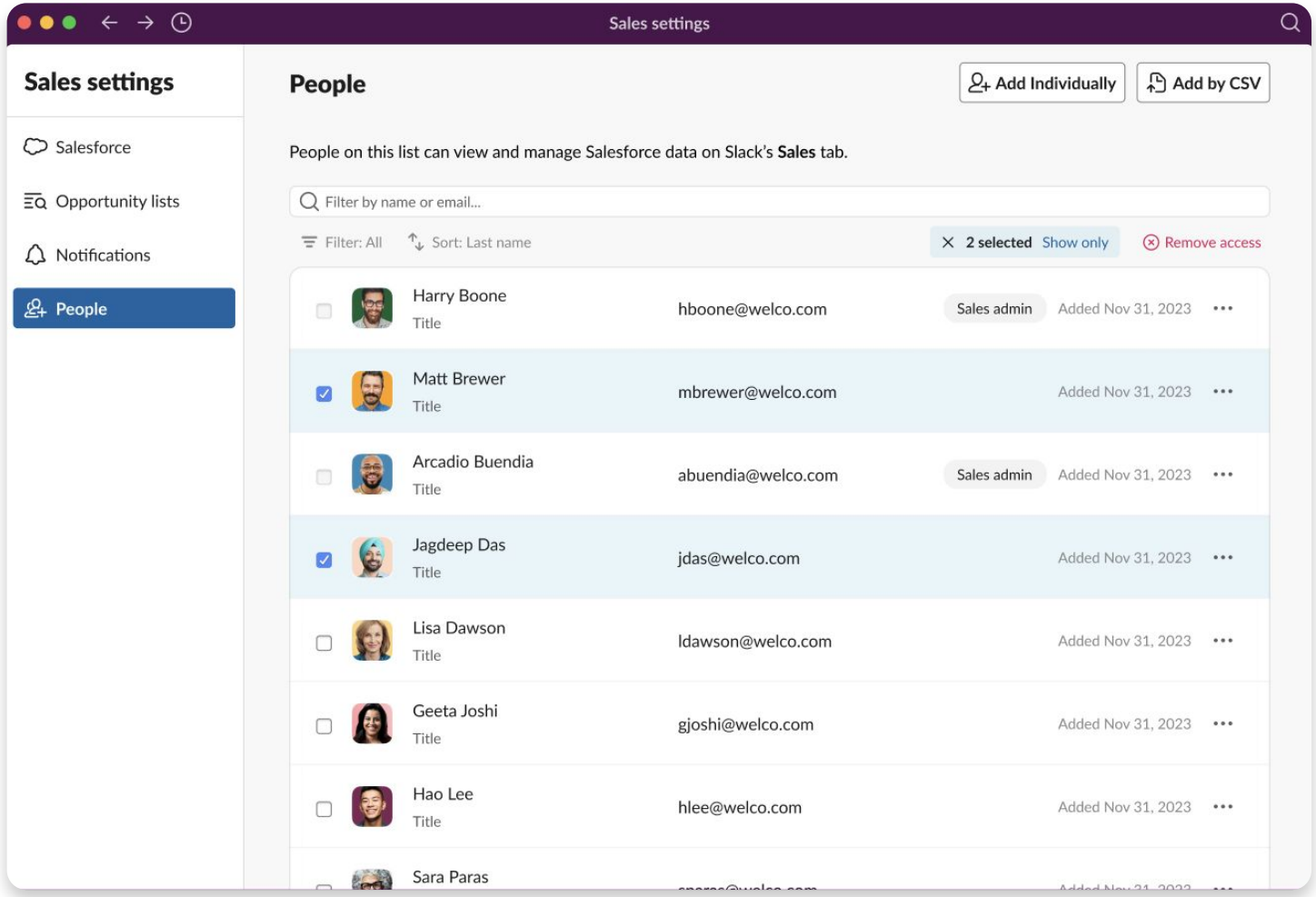
This typically happens if there are formatting issues in your CSV or if listed emails are not a part of your organization.



# Member Management

Once you grant your team access, you can come back any time to **Sales settings** to add new members or revoke access.

Once removed, the person will no longer see the Sales tab in Slack. They will not be removed from any channels.



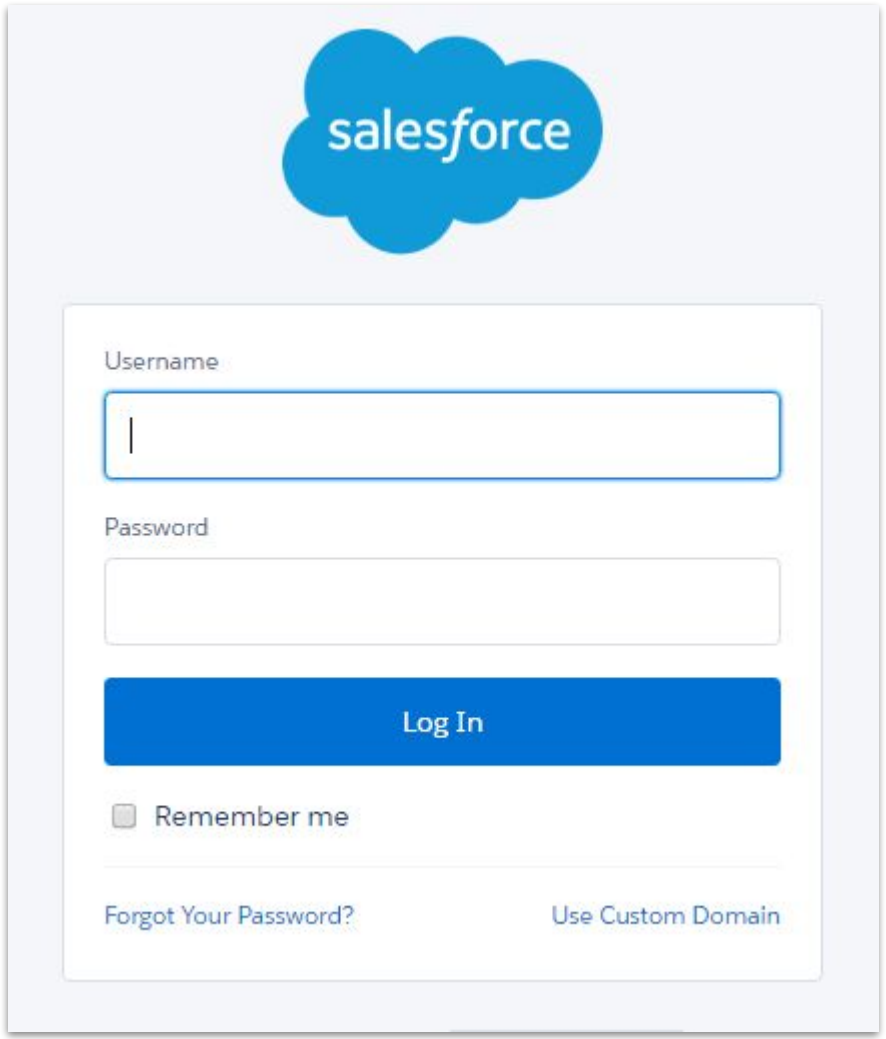
# Test the End User Experience



# Connect Your User Account

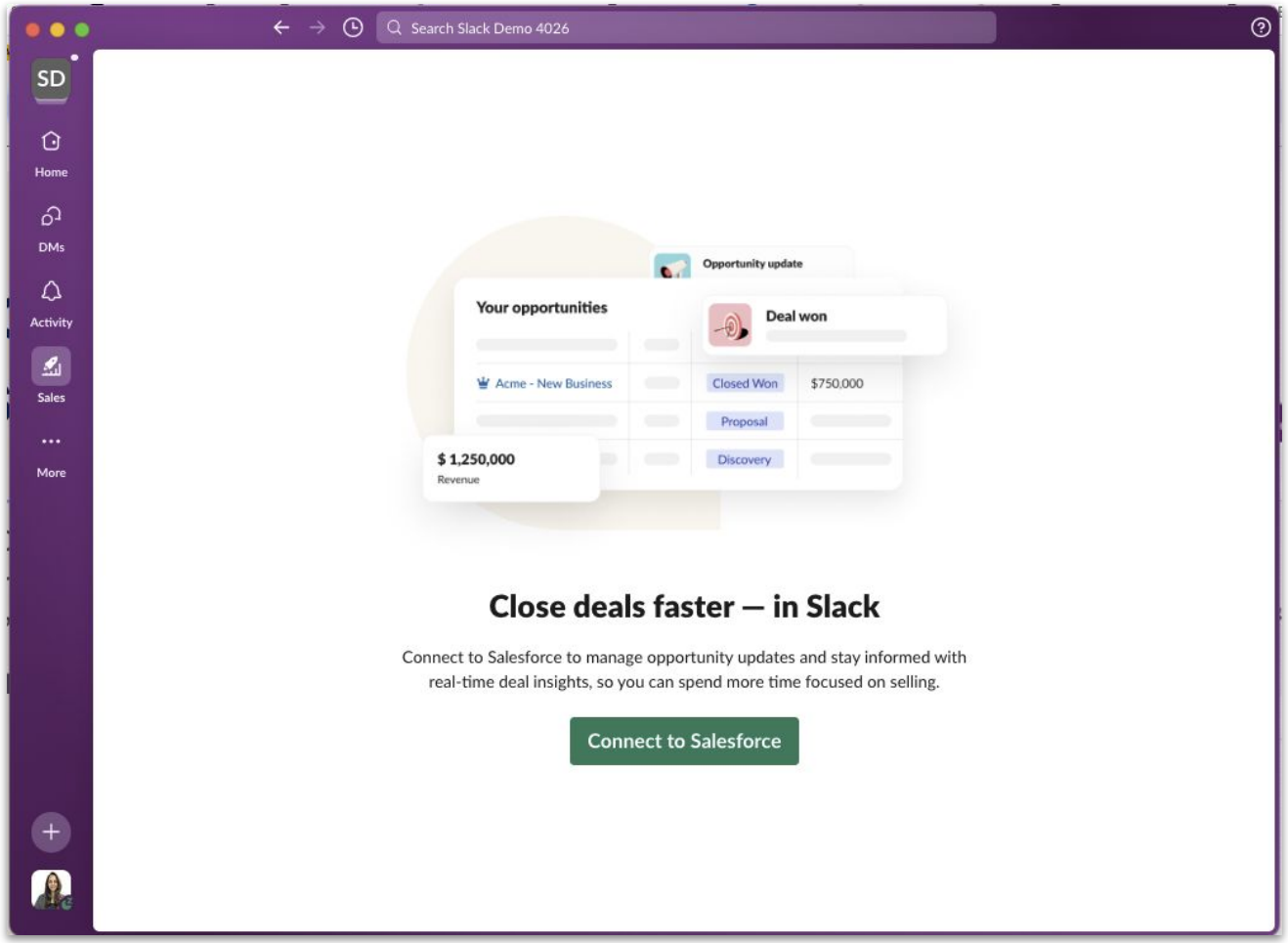
Once you've completed the administrative setup for Sales Elevate, you'll be able to connect your account as a user

To begin, log out of Salesforce as the Integration User and log in with your **personal credentials**



# Connect Your User Account

Back in Slack, navigate to the Sales tab and click **Connect to Salesforce**

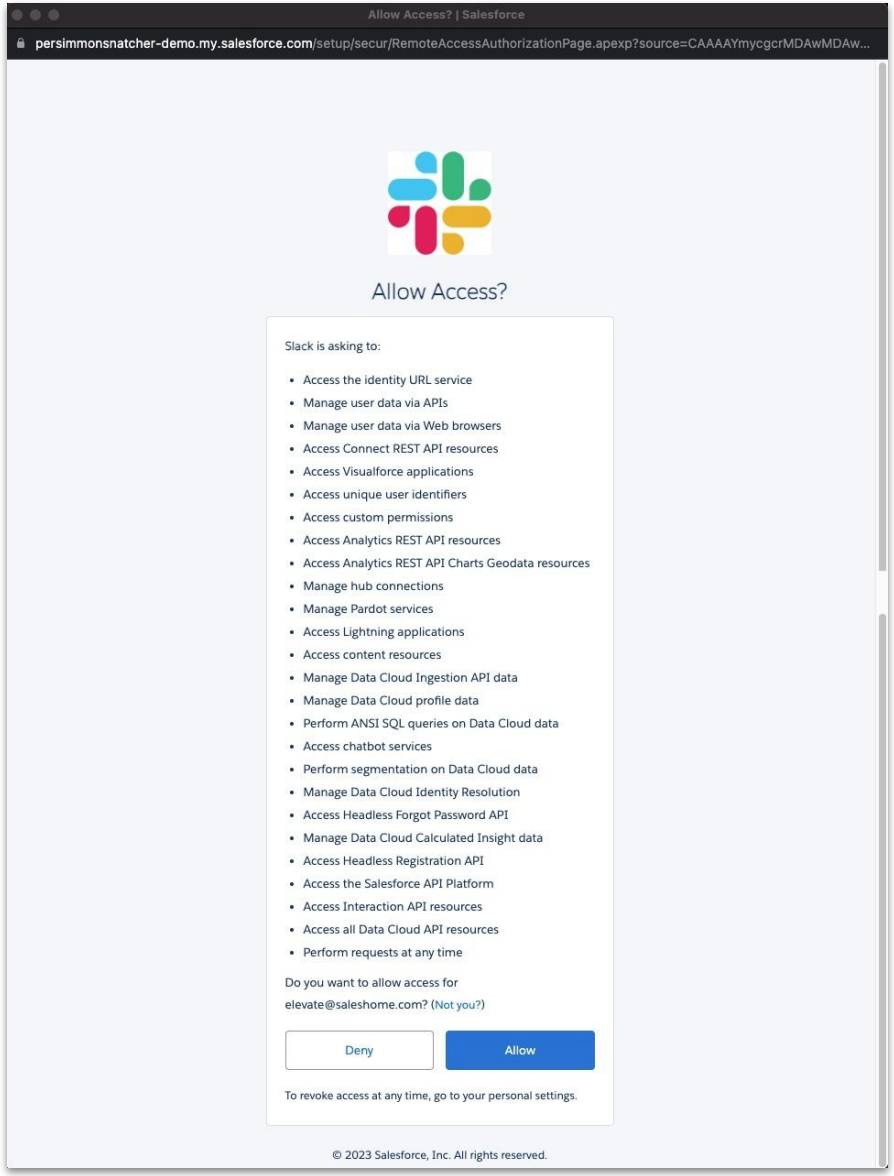


# Connect Your User Account

**Important**: Confirm that you are logged in using your personal credentials by verifying your email address

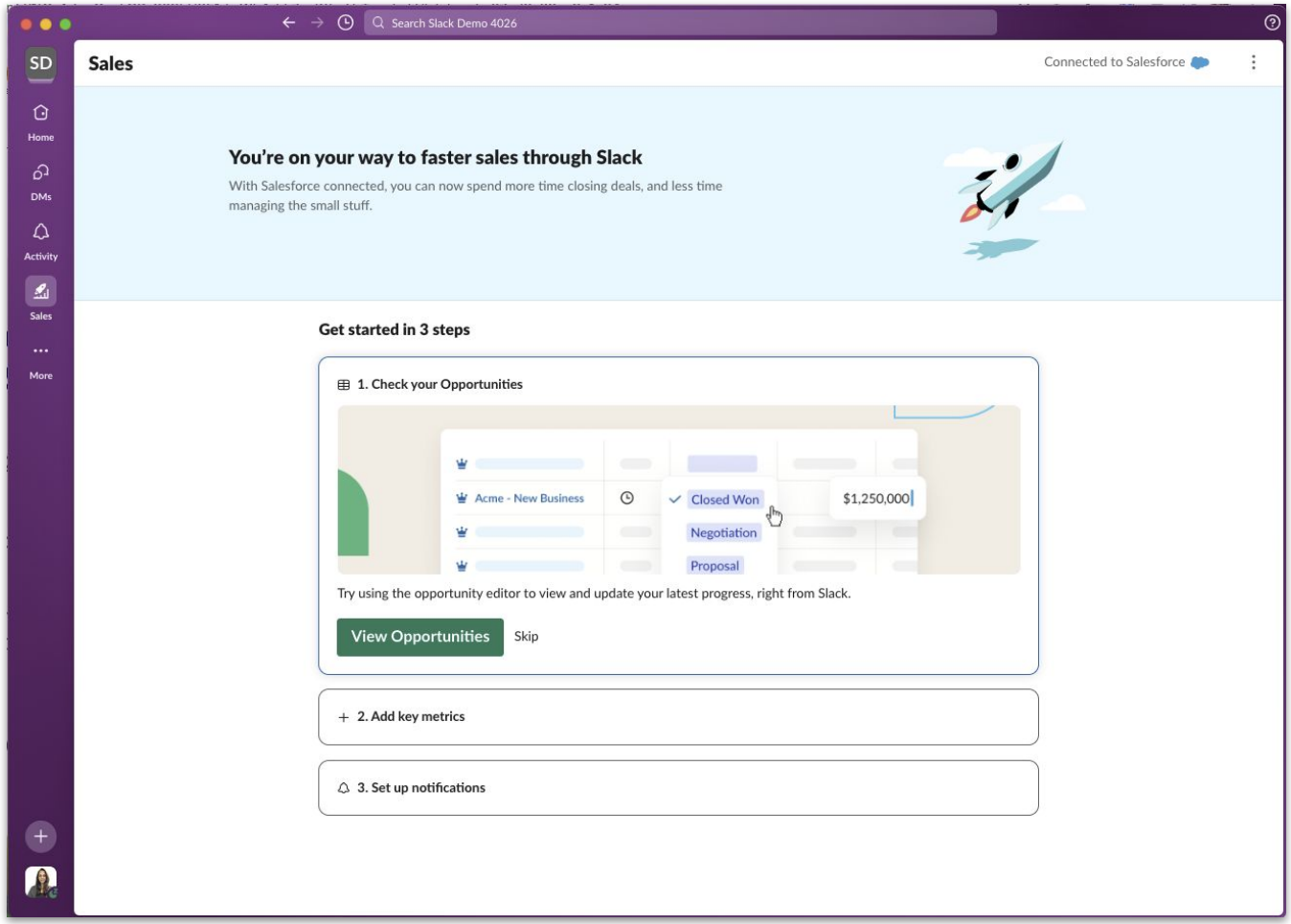
If you are not, click the **Not you?** button to enter your personal credentials

Click **Allow**



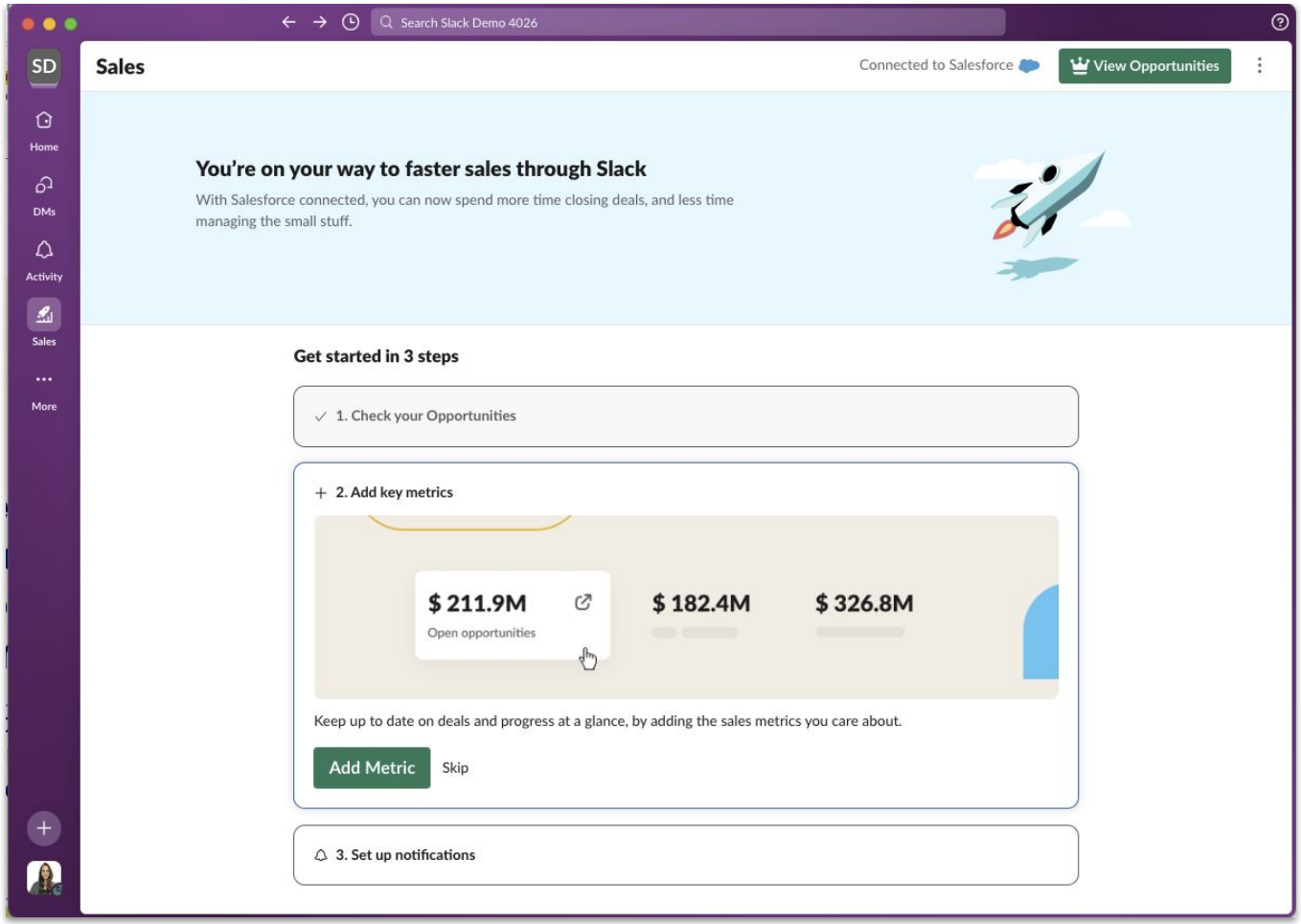
# Proceed through the New User Setup experience

Select your opportunity list to confirm you can view & edit opportunities



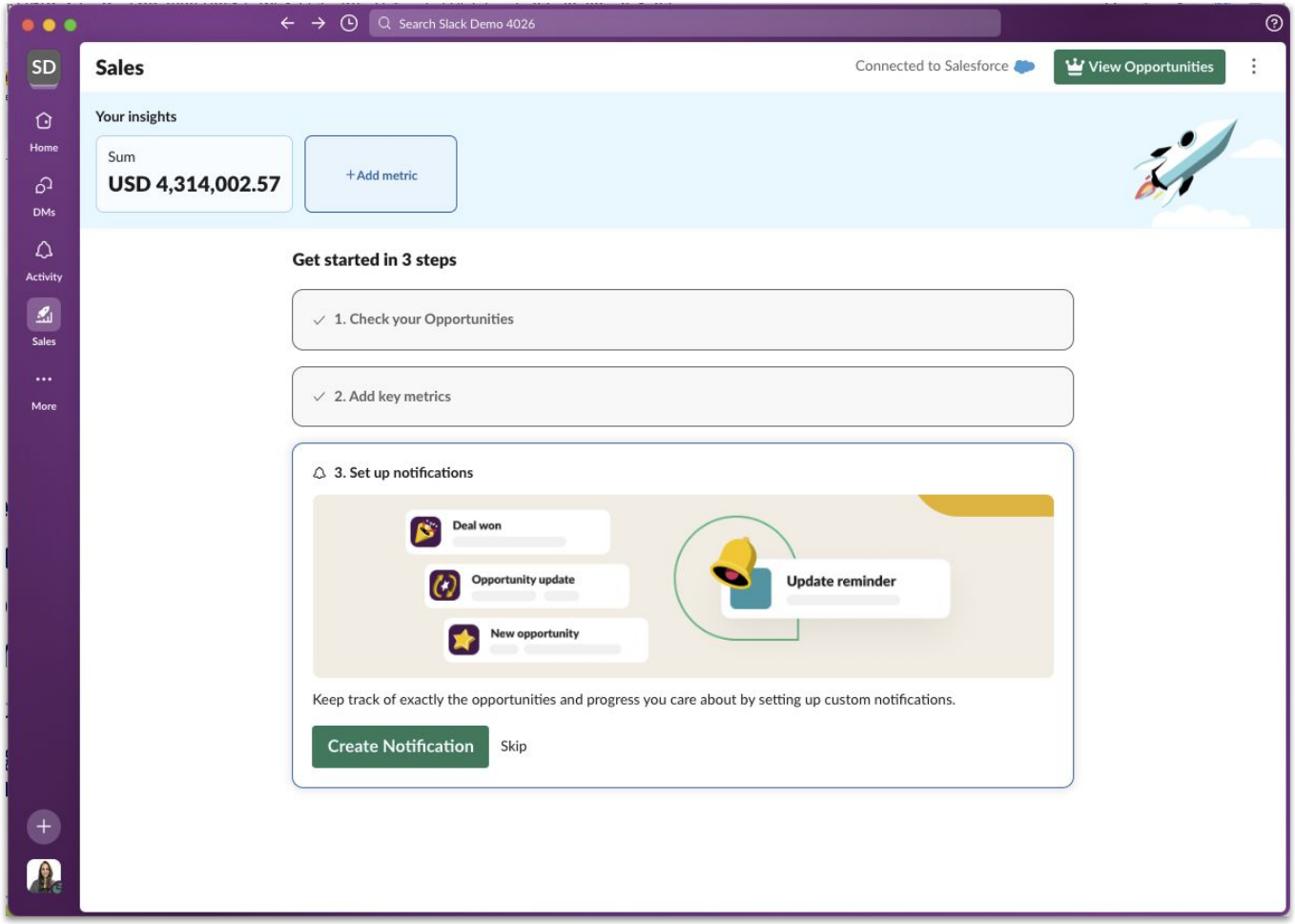
# Proceed through the New User Setup experience

Add a metric to view key performance indicators



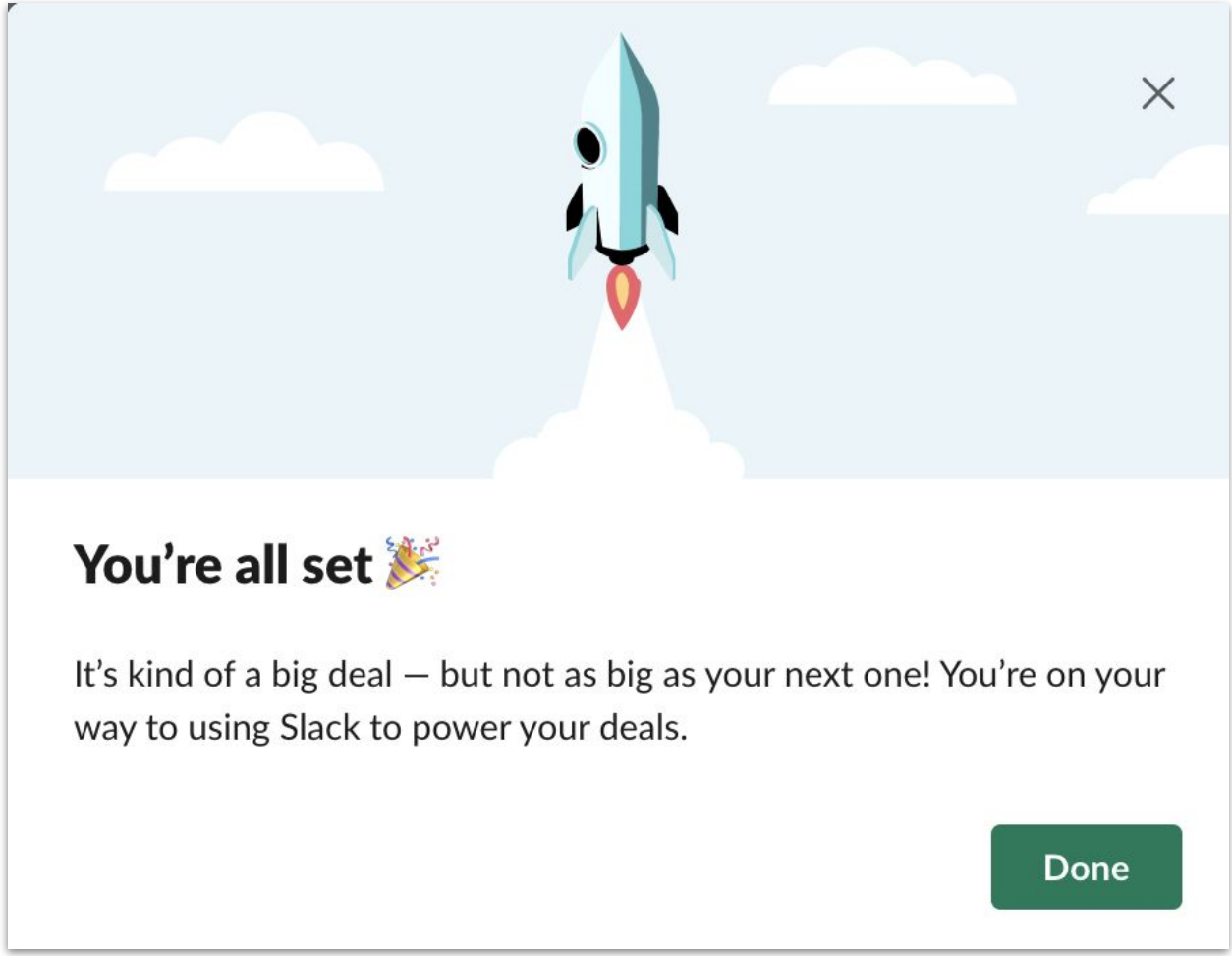
# Proceed through the New User Setup experience

Configure real-time alerts for changes to opportunities



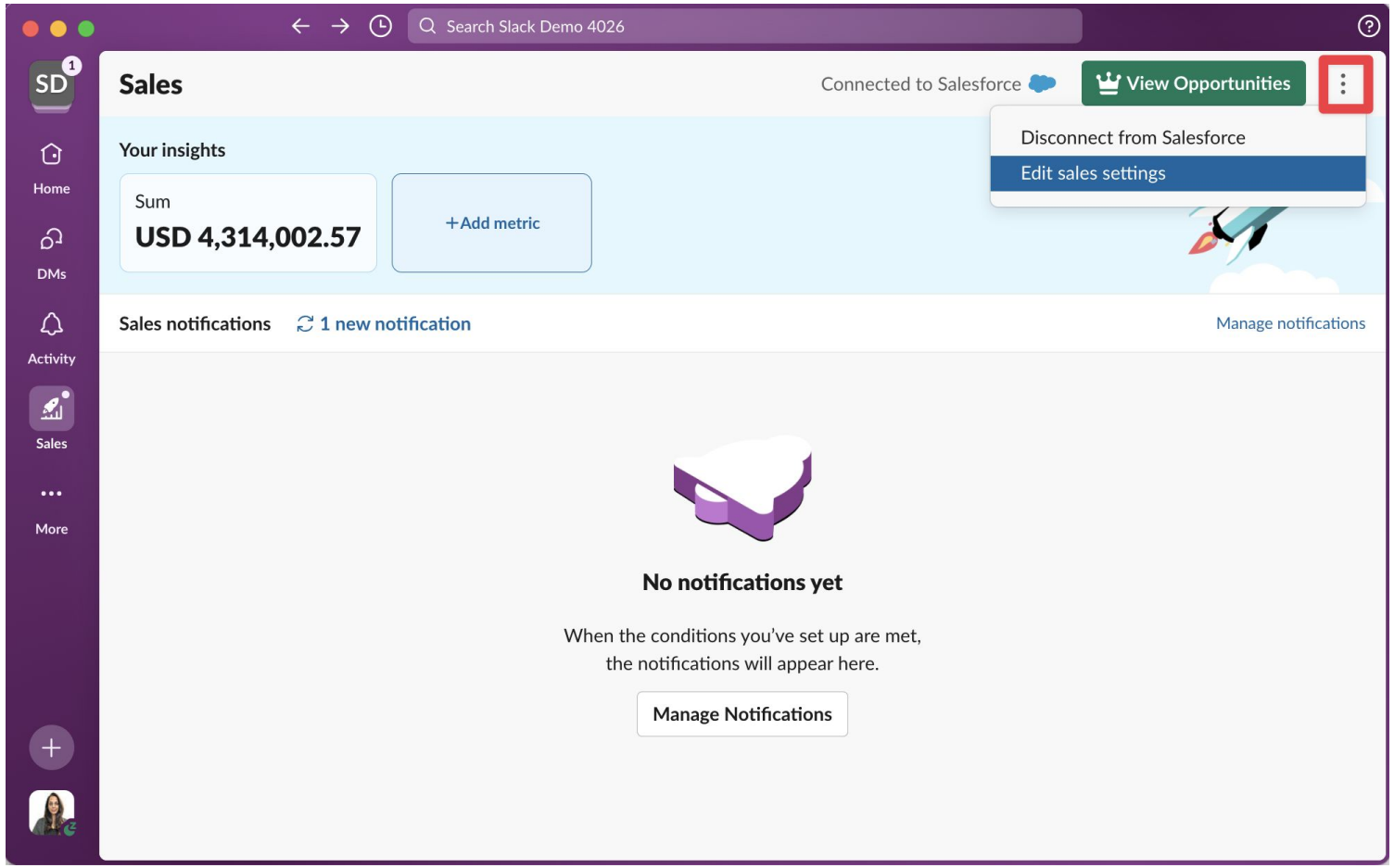
# Proceed through the New User Setup experience

You've now completed setup for Slack Sales Elevate!



# Pro Tip: Returning to the Admin Page

To return to the setup screen at any time, click the three dots in the upper right and select “Edit sales settings”



slack
from Salesforce

# Thank you 👋

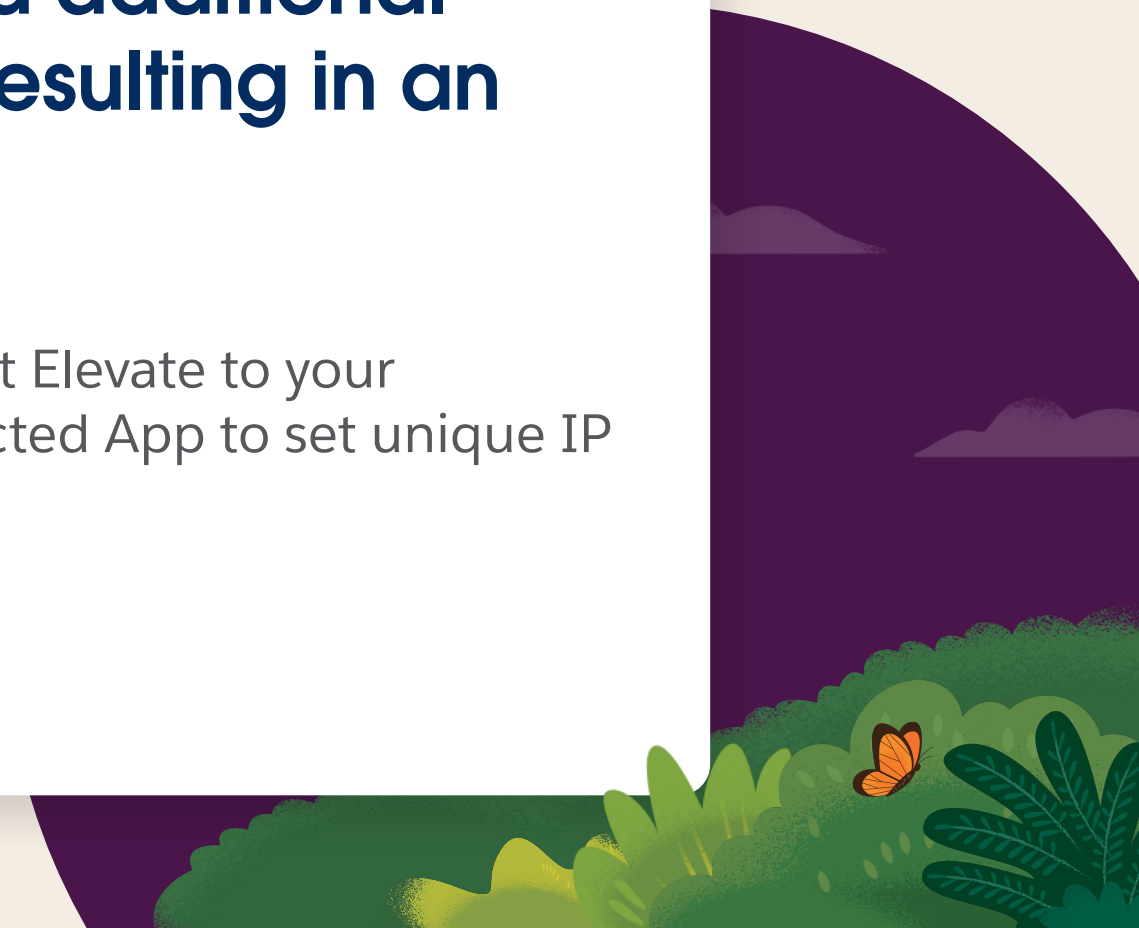


# Appendix



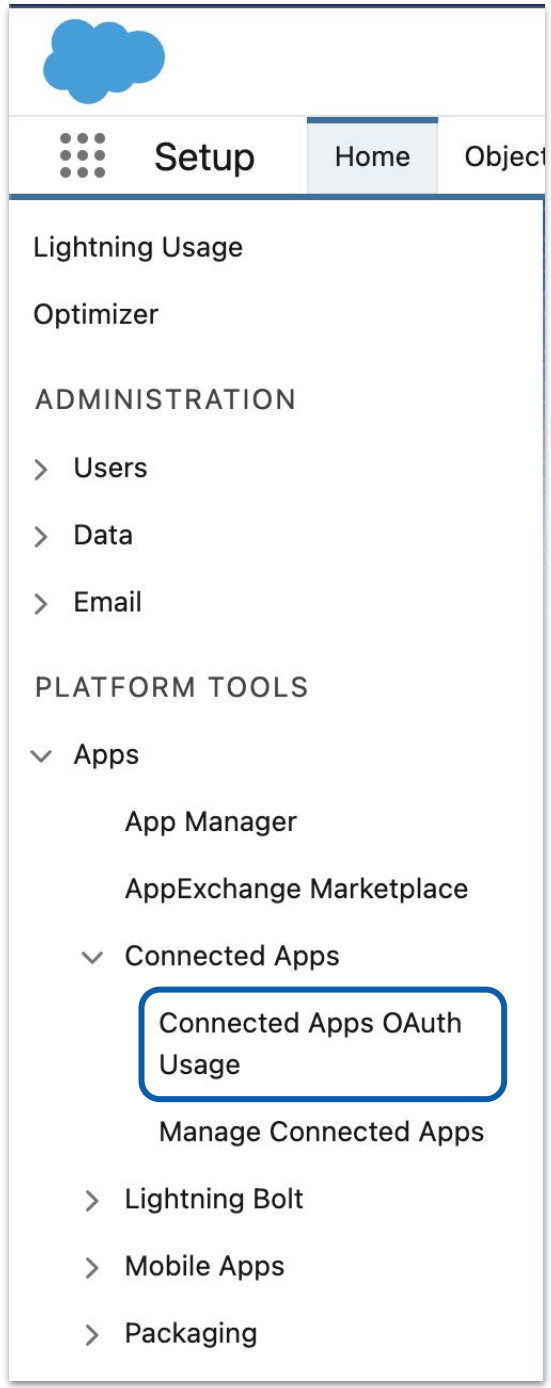
# Some customers have enforced additional security controls for IP ranges, resulting in an error during the install process

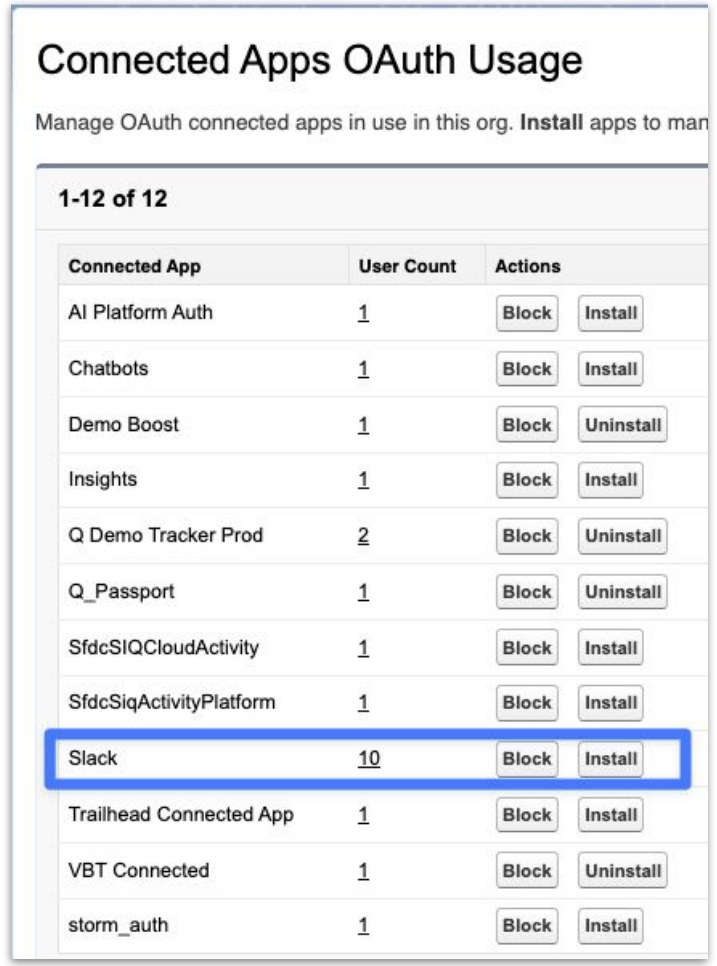
To resolve this, after you've attempted to connect Elevate to your Salesforce environment, you can install a Connected App to set unique IP restrictions for Slack



# Install the Slack Connected App

- In Salesforce settings, navigate to the **Connected Apps OAuth Usage** page
- Click **“Install”** for the Slack Connected App



# Configure IP Restrictions

Once installed, confirm that IP Restrictions are set correctly

- Navigate to **Manage Connected Apps**
- Click **Edit** for the Slack Connected App
- Change **IP Relaxation** to “**Relax IP restrictions**”

