



Setting up the Slack App for Salesforce

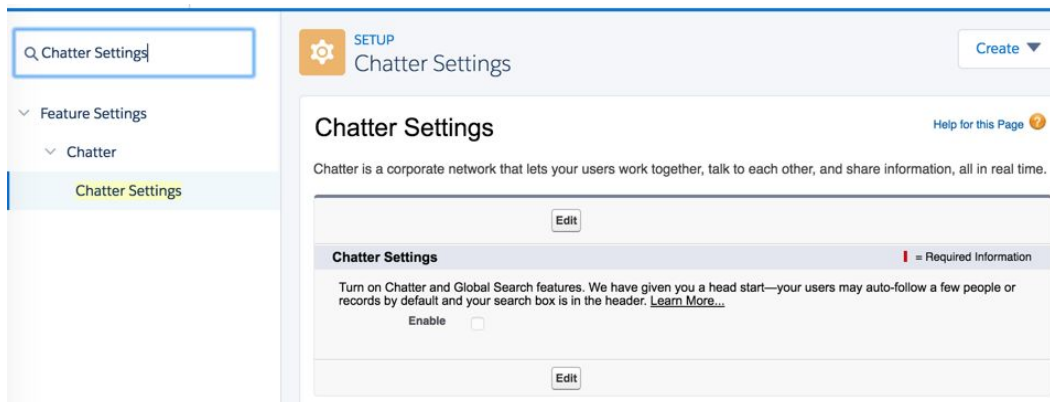
This document serves as a setup and installation guide for Salesforce Administrators on integrating Slack into an org for its users from installing the Slack AppExchange package to connecting with different Slack teams.

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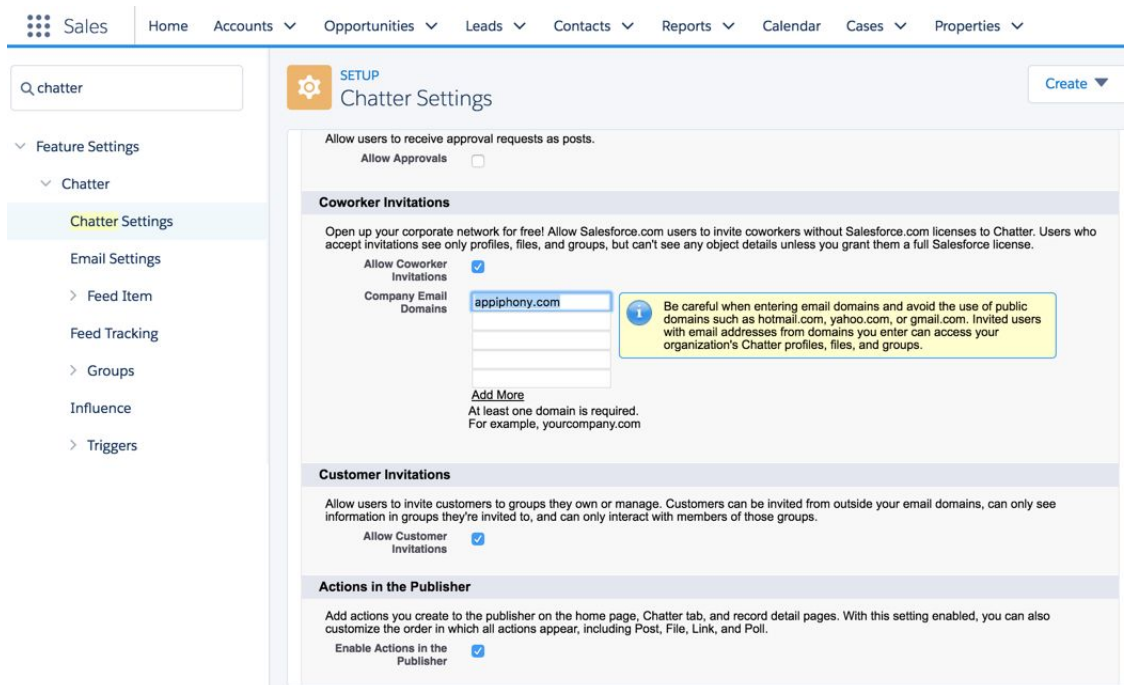
Chatter Setup

Chatter is required for this Slack integration.

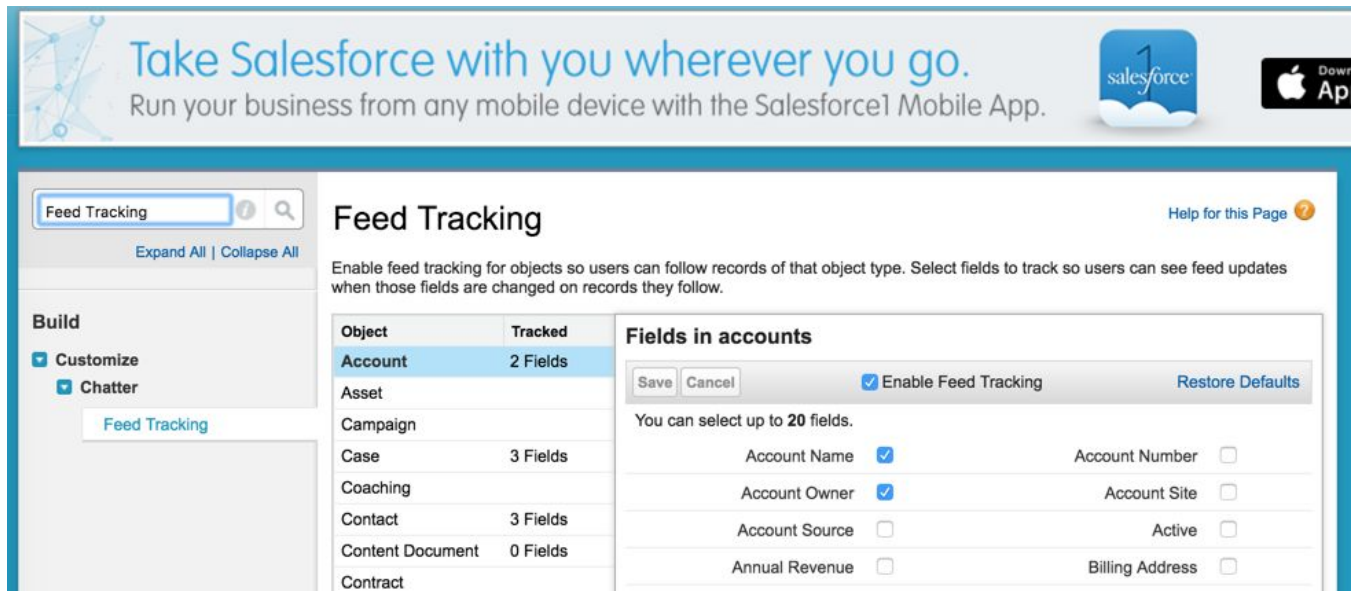
In Salesforce Lightning, the path would be Setup > Feature Settings > Chatter > Chatter Settings or you can search for “Chatter Settings” in the setup menu search bar. From there, click “Edit” and check the box for enabling chatter.



Once additional configuration options appear, make sure that the checkbox for “Actions in the Publisher” is checked off before clicking “Save” to complete chatter activation. This is what allows Chatter to work with the Slack integration:



Chatter feed tracking for standard and custom objects and fields can be checked in the classic version of Salesforce by searching for “Feed Tracking” in the setup search bar:



The screenshot shows the Salesforce 'Feed Tracking' setup page. At the top, there's a banner for the Salesforce1 Mobile App. Below the banner, a search bar contains 'Feed Tracking'. The left sidebar shows the 'Build' menu with 'Customize' and 'Chatter' selected, and 'Feed Tracking' highlighted. The main content area is titled 'Feed Tracking' and includes a description: 'Enable feed tracking for objects so users can follow records of that object type. Select fields to track so users can see feed updates when those fields are changed on records they follow.' A table lists objects and the number of fields tracked: Account (2 Fields), Asset, Campaign, Case (3 Fields), Coaching, Contact (3 Fields), Content Document (0 Fields), and Contract. To the right, the 'Fields in accounts' section has a 'Save' button, a 'Cancel' button, a checked 'Enable Feed Tracking' checkbox, and a 'Restore Defaults' link. Below this, a list of fields for the Account object is shown with checkboxes: Account Name (checked), Account Number (unchecked), Account Owner (checked), Account Site (unchecked), Account Source (unchecked), Active (unchecked), Annual Revenue (unchecked), and Billing Address (unchecked).

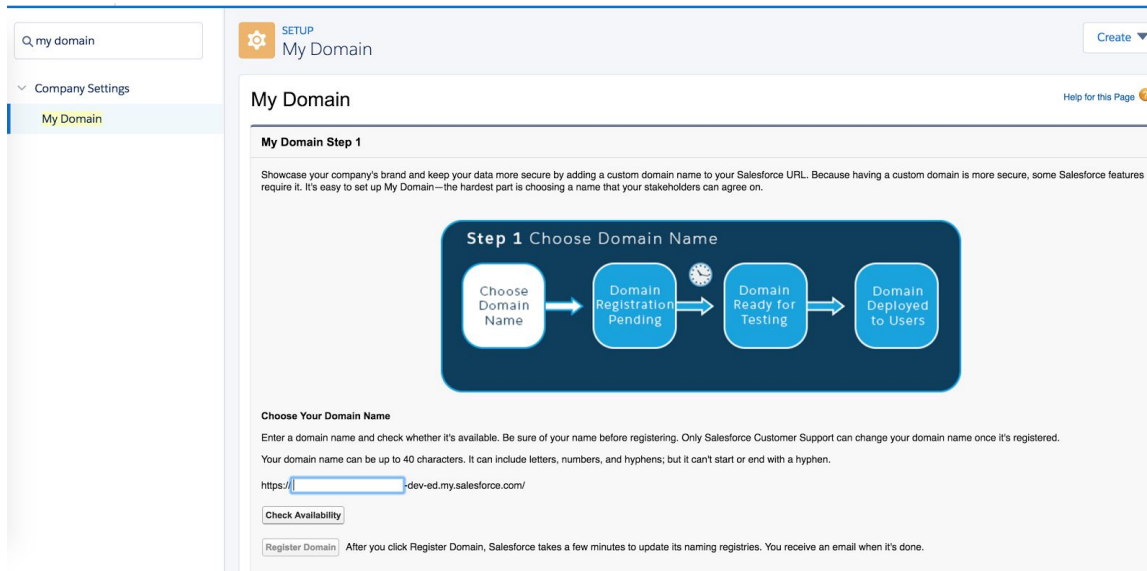
Object	Tracked
Account	2 Fields
Asset	
Campaign	
Case	3 Fields
Coaching	
Contact	3 Fields
Content Document	0 Fields
Contract	

Fields in accounts	
Account Name	☒
Account Number	☐
Account Owner	☒
Account Site	☐
Account Source	☐
Active	☐
Annual Revenue	☐
Billing Address	☐

Domain Setup

A custom domain is required in order for the Slack Lightning component to function. Creating a domain for the org can be done by clicking on the gear in the upper right and then through Setup > Company Settings > My Domain

Check for the availability of a domain and register it



Q my domain

SETUP My Domain

Create

Company Settings

My Domain

My Domain

Help for this Page

My Domain Step 1

Showcase your company's brand and keep your data more secure by adding a custom domain name to your Salesforce URL. Because having a custom domain is more secure, some Salesforce features require it. It's easy to set up My Domain—the hardest part is choosing a name that your stakeholders can agree on.

Step 1 Choose Domain Name

Choose Domain Name

Domain Registration Pending

Domain Ready for Testing

Domain Deployed to Users

Choose Your Domain Name

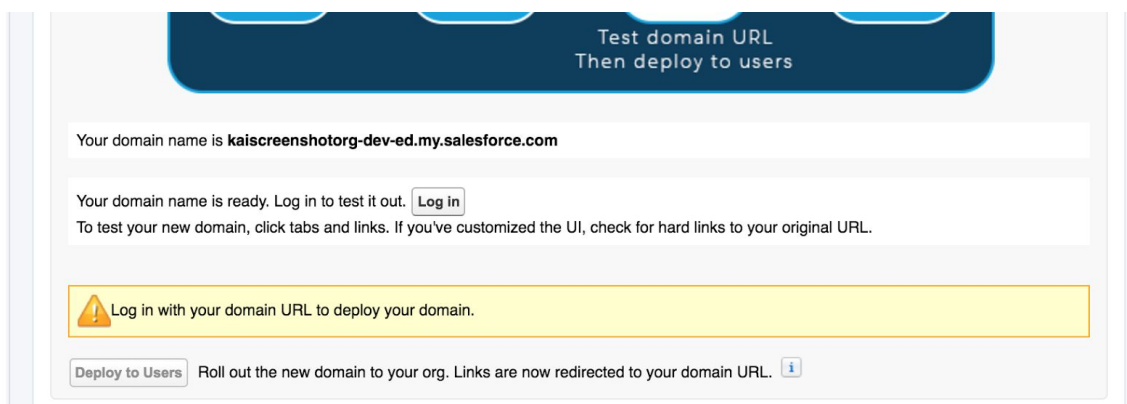
Enter a domain name and check whether it's available. Be sure of your name before registering. Only Salesforce Customer Support can change your domain name once it's registered. Your domain name can be up to 40 characters. It can include letters, numbers, and hyphens; but it can't start or end with a hyphen.

https://[]-dev-ed.my.salesforce.com/

Check Availability

Register Domain After you click Register Domain, Salesforce takes a few minutes to update its naming registries. You receive an email when it's done.

After the domain has been registered, refresh the page. You will need to log in to the new domain for the org in order to continue the process – click on the “Log In” button and reenter your credentials.



Test domain URL
Then deploy to users

Your domain name is **kaisscreenshotorg-dev-ed.my.salesforce.com**

Your domain name is ready. Log in to test it out. [Log in](#)

To test your new domain, click tabs and links. If you've customized the UI, check for hard links to your original URL.

Log in with your domain URL to deploy your domain.

[Deploy to Users](#) Roll out the new domain to your org. Links are now redirected to your domain URL. [i](#)

After logging in, deploy to users

Your domain name is **kaiscreenshotorg-dev-ed.my.salesforce.com**

Your domain name is ready. Log in to test it out. [Log in](#)

To test your new domain, click tabs and links. If you've customized the UI, check for hard links to your original URL.

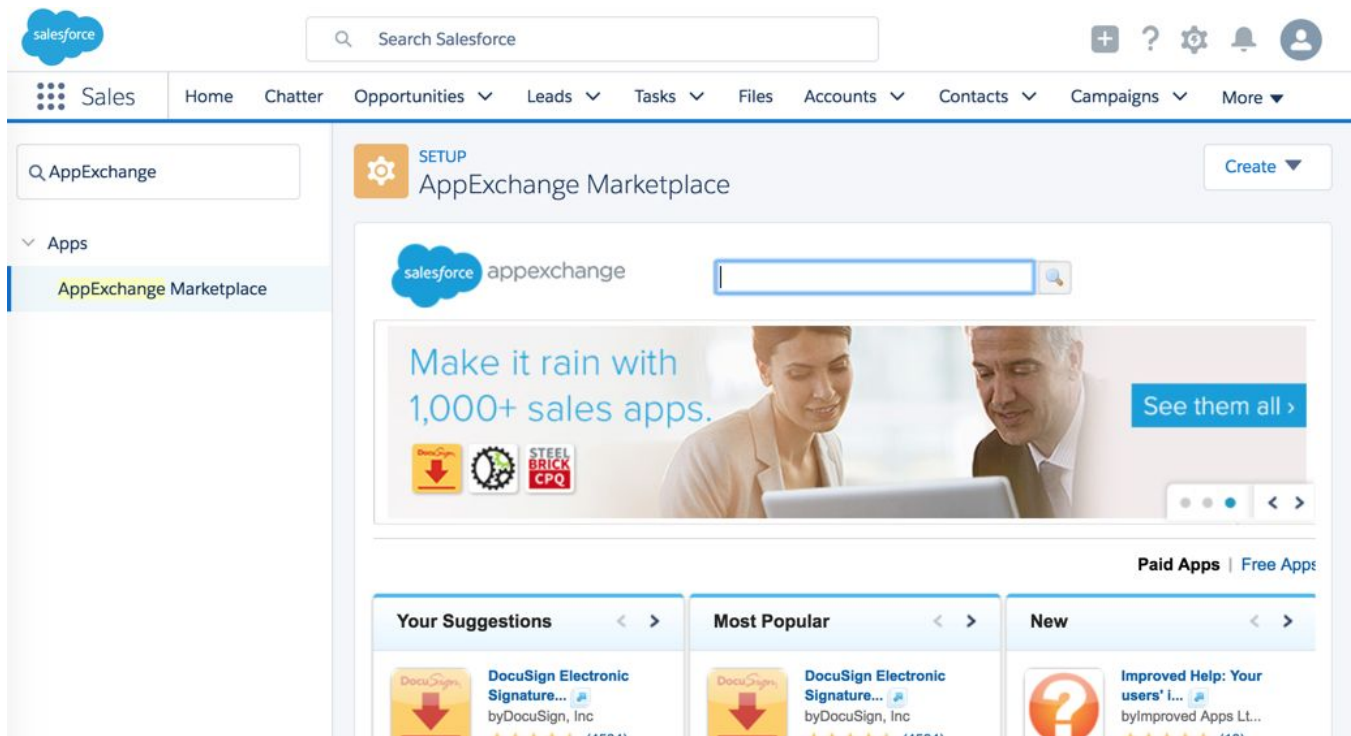
[Deploy to Users](#) Roll out the new domain to your org. Links are now redirected to your domain URL. [i](#)

Authentication Configuration [Edit](#)

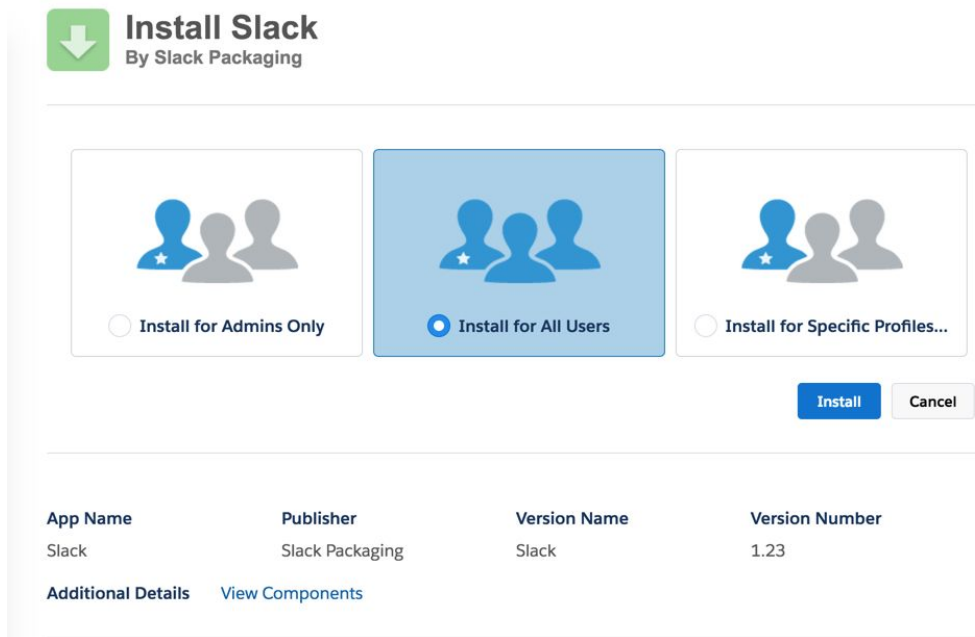
Install the Slack AppExchange App in Salesforce

An Administrator can search for the Slack app in the Salesforce AppExchange and initiate an install from there. If the app is not yet available, then an install link provided by the Slack development team can be used.

Search for “AppExchange Marketplace” in the Salesforce Setup Menu. From here you can search for the Slack app and initiate an install. The user will be prompted to re-enter their credentials.



“Install for All Users” is required if you want to enable Slack access to/from Salesforce for every user in your org.



Install Slack
By Slack Packaging

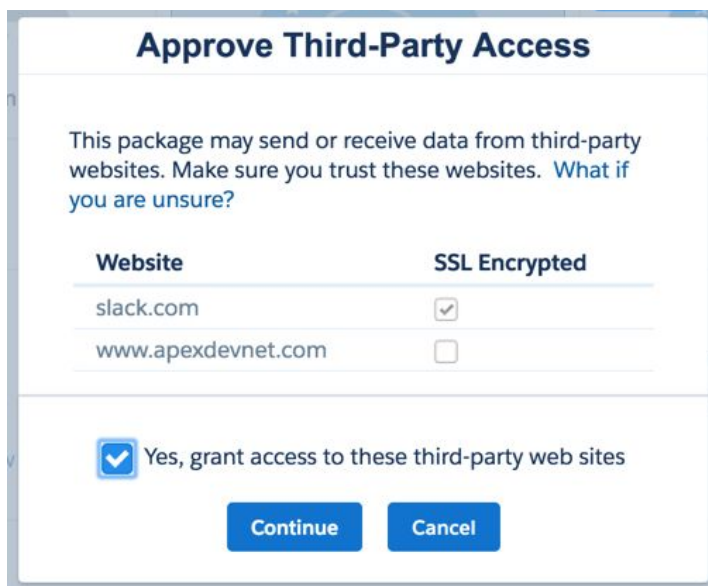
☐ Install for Admins Only ☒ Install for All Users ☐ Install for Specific Profiles...

Install **Cancel**

App Name	Publisher	Version Name	Version Number
Slack	Slack Packaging	Slack	1.23

[Additional Details](#) [View Components](#)

Confirm that you want to allow third party access to your org:



Approve Third-Party Access

This package may send or receive data from third-party websites. Make sure you trust these websites. [What if you are unsure?](#)

Website	SSL Encrypted
slack.com	☒
www.apexdevnet.com	☐

☒ Yes, grant access to these third-party web sites

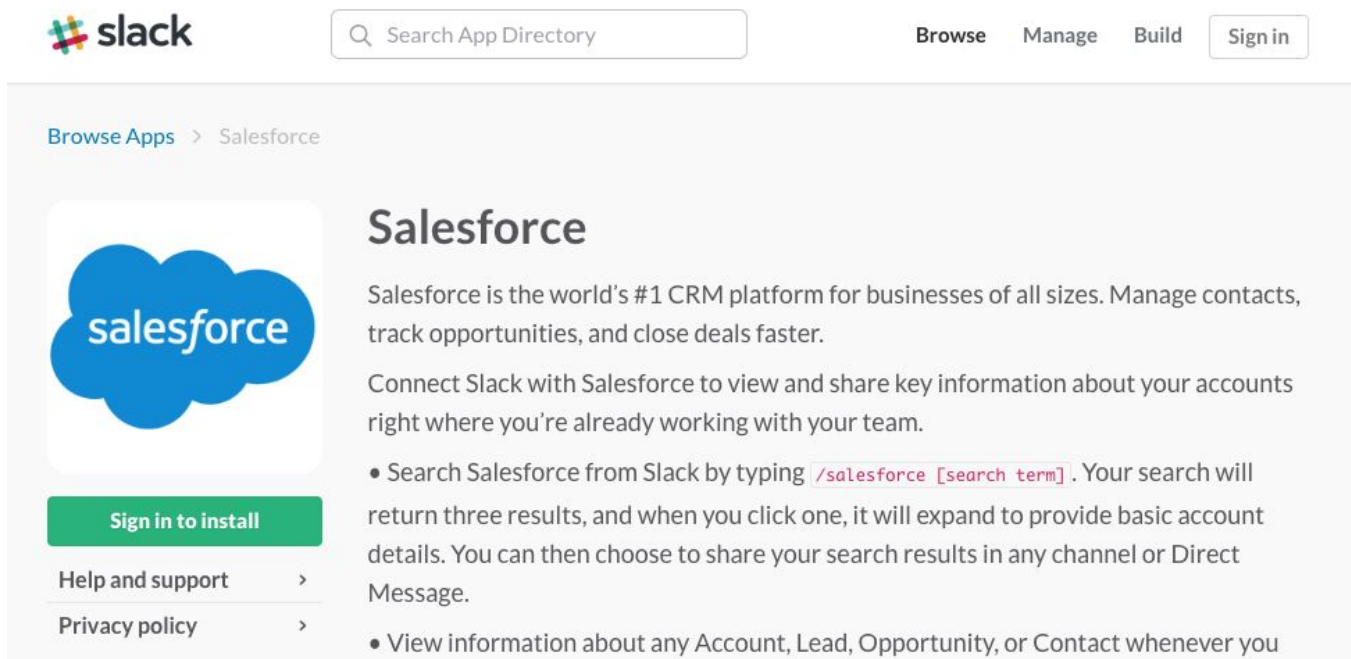
Continue **Cancel**

Install the Salesforce App in Slack

Search for the Salesforce App on the Slack App Directory and add the integration for your team. If the app is not yet available, use an install link while you have the correct team selected in the Slack App Directory page. The link would be provided by Slack if you have early access.

(<https://my.slack.com/apps/A2DAS7NNR-salesforce>)

While logged in to your Slack account and with the correct Slack Team selected in the web manager, copy-paste the install URL for the Salesforce App into your URL bar.

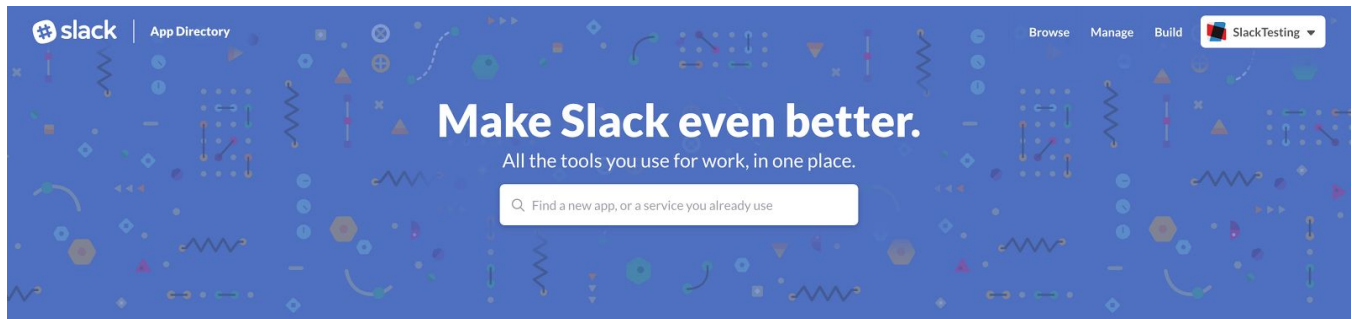


The screenshot shows the Slack App Directory interface. At the top, there's a Slack logo, a search bar labeled "Search App Directory", and navigation links: "Browse", "Manage", "Build", and "Sign in". Below the header, the breadcrumb "Browse Apps > Salesforce" is visible. The main content area features the Salesforce app card on the left, which includes the Salesforce logo and a green "Sign in to install" button. Below the button are links for "Help and support" and "Privacy policy". To the right of the app card, the title "Salesforce" is followed by a description: "Salesforce is the world's #1 CRM platform for businesses of all sizes. Manage contacts, track opportunities, and close deals faster." Below this is another paragraph: "Connect Slack with Salesforce to view and share key information about your accounts right where you're already working with your team." At the bottom, there are two bullet points: "• Search Salesforce from Slack by typing `/salesforce [search term]`. Your search will return three results, and when you click one, it will expand to provide basic account details. You can then choose to share your search results in any channel or Direct Message." and "• View information about any Account, Lead, Opportunity, or Contact whenever you".

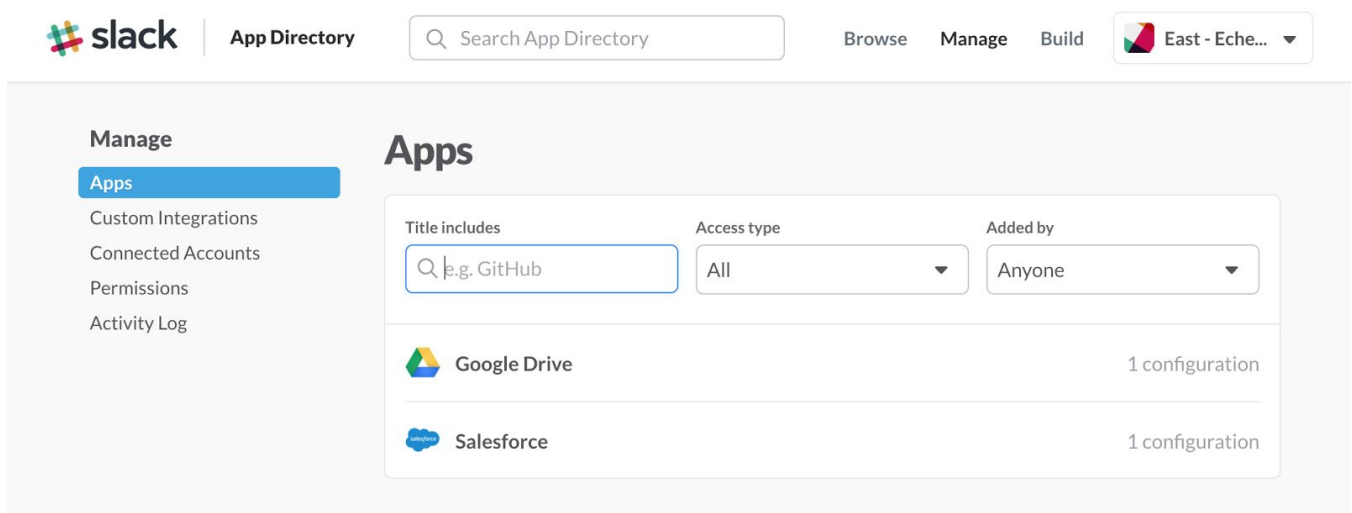
Authenticate Your Salesforce Account from Slack

The Slack integration features involves a two step OAuth process: Signing into Salesforce from Slack and then signing into Slack from Salesforce.

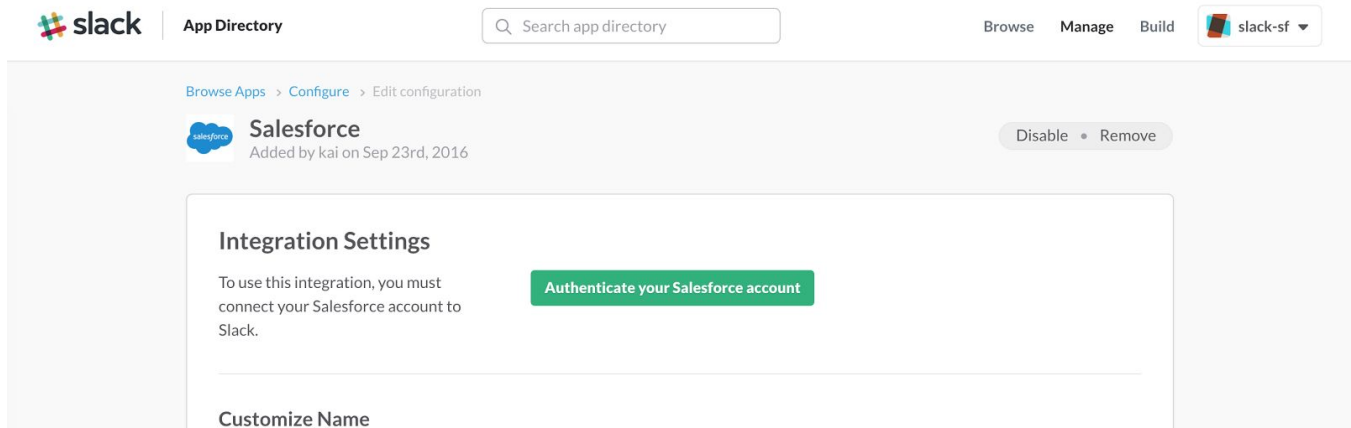
Access Slack authentication by clicking on “Manage” in the upper right while having the correct team selected:



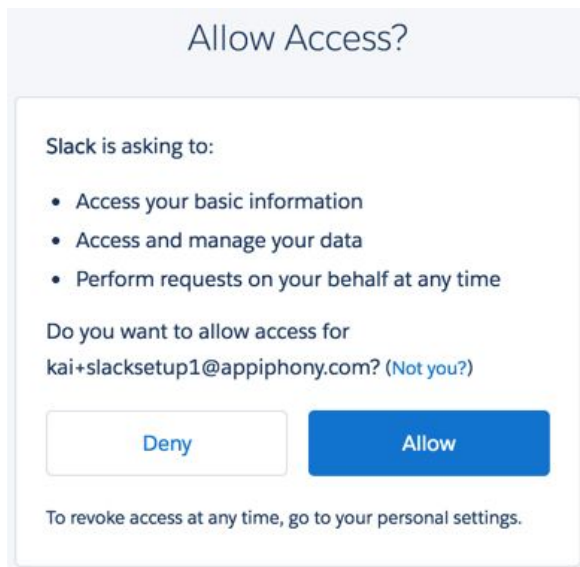
While in the management menu, click on the Salesforce app:



Authenticate your Salesforce account once you are in the settings page for the Salesforce app:



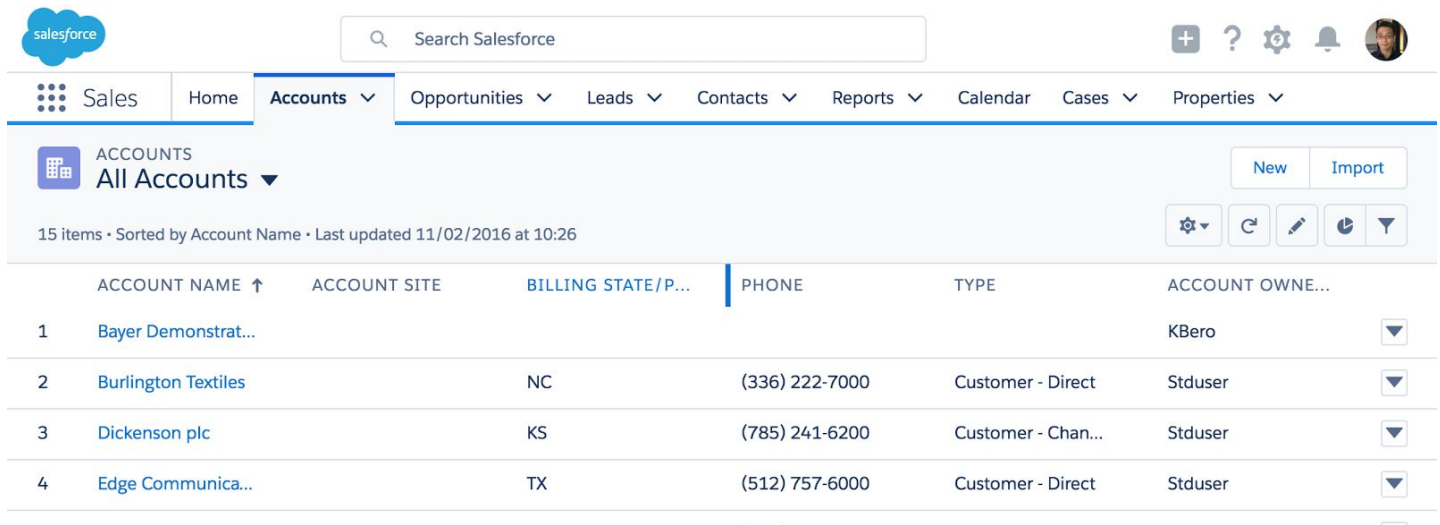
Allow Slack to access your org.



Adding a Slack Component on a Lightning Page

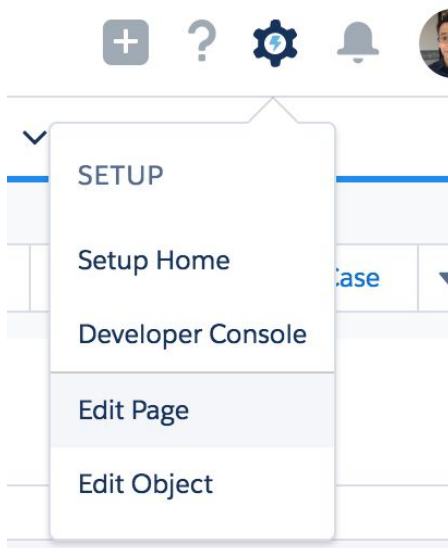
Record pages in Salesforce are not all configured the same out way of the box. For the Slack integration, the “Chatter” and “Slack” lightning components need to be added to the page layout for each object where you would like integration features to be available. Officially supported objects are Account, Contact, Opportunity, Lead, and Case, although the component may work for other objects and custom objects as well (not tested).

Navigate to a record page by clicking on the object on the navigation bar and then a specific record:



	ACCOUNT NAME ↑	ACCOUNT SITE	BILLING STATE/P...	PHONE	TYPE	ACCOUNT OWNE...
1	Bayer Demonstrat...					KBero
2	Burlington Textiles		NC	(336) 222-7000	Customer - Direct	Stduser
3	Dickenson plc		KS	(785) 241-6200	Customer - Chan...	Stduser
4	Edge Communica...		TX	(512) 757-6000	Customer - Direct	Stduser

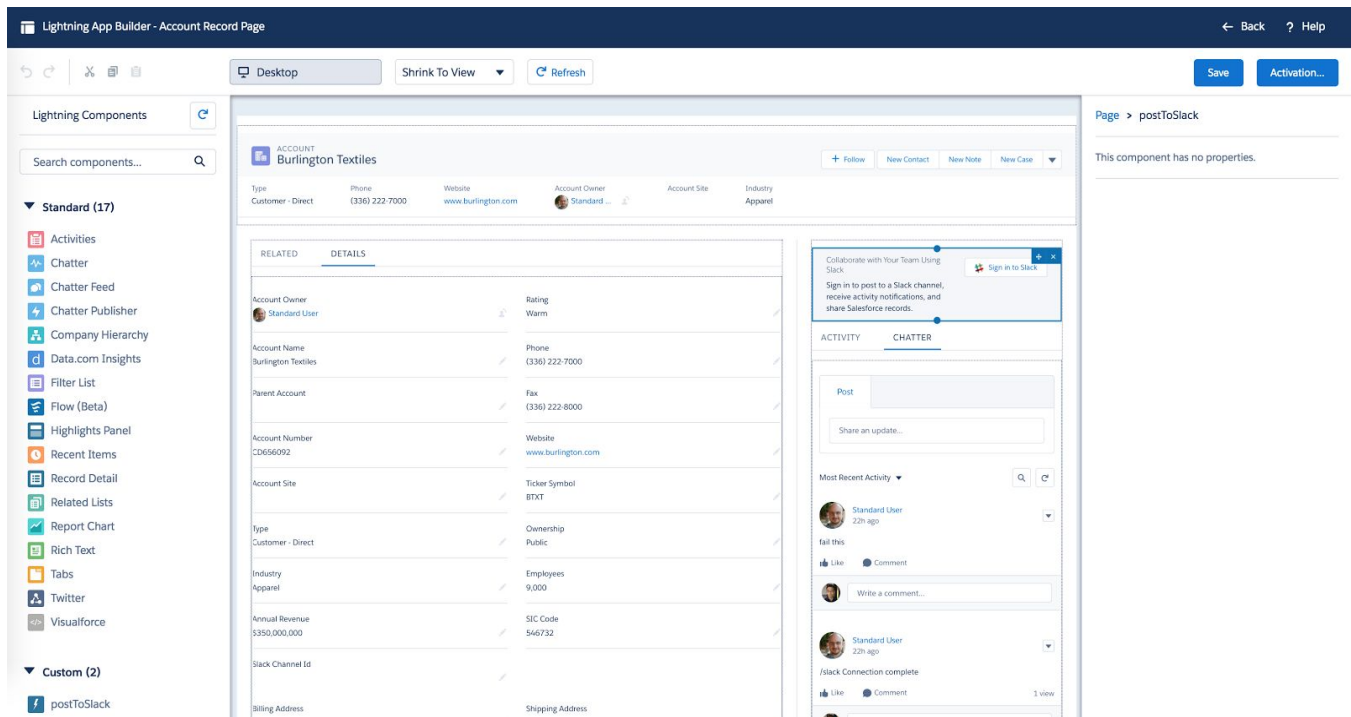
After clicking on that record and navigating to the record page, click on the gear in the upper right and select “Edit Page”:



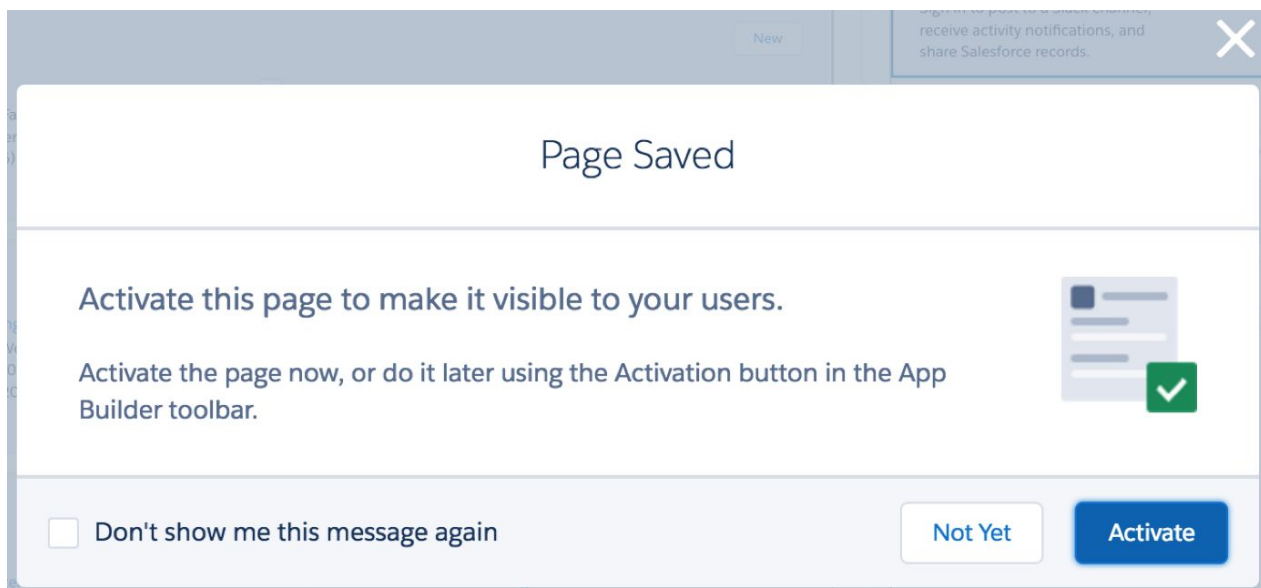
- SETUP
- Setup Home
- Developer Console
- Edit Page
- Edit Object

Edit the record page layout by dragging and dropping components onto the page and editing individual tabs/elements.

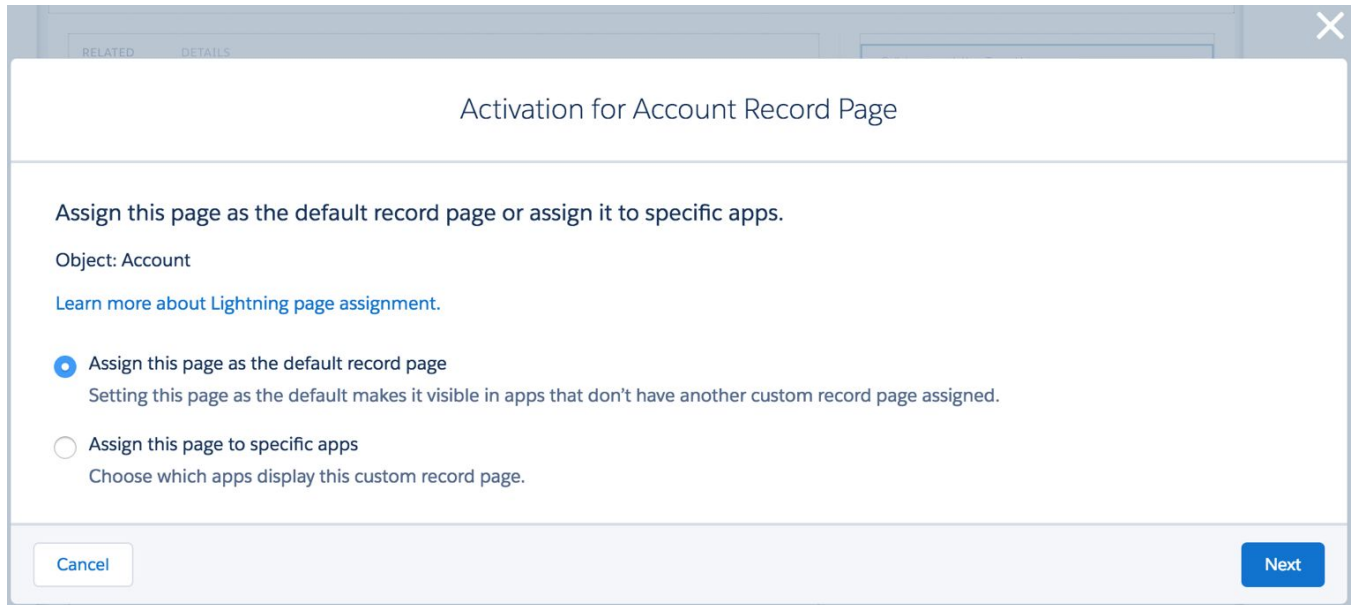
Having the correct Chatter and Slack components on the page are the minimum requirements for being able to demo using the records of an object.



After finishing with changes, save and activate the changes you have made:



The new page layout can be assigned as the new default for all users with access to the object, or it can be assigned so that it only appears when the object is a tab for a specific “App”



Activation for Account Record Page

Assign this page as the default record page or assign it to specific apps.

Object: Account

[Learn more about Lightning page assignment.](#)

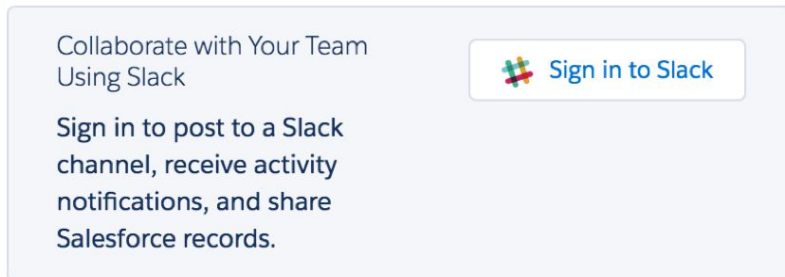
☒ Assign this page as the default record page
Setting this page as the default makes it visible in apps that don't have another custom record page assigned.

☐ Assign this page to specific apps
Choose which apps display this custom record page.

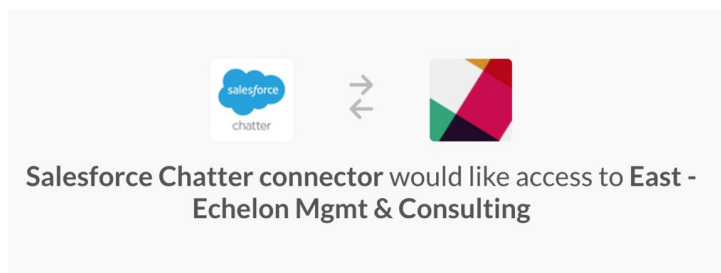
Cancel Next

Authenticate Your Slack Account from Salesforce

Authenticating to Slack in Salesforce is done through the Slack Lightning component.



- Click 'Sign in to Slack' and click 'Continue' when the Salesforce alert appears
- Log in if necessary in the new tab
- Select the Slack team that you want to connect to your Salesforce org (if the default is not correct)
- Authorize Salesforce to connect to your Slack team
- You should get a success message afterwards



This will allow Salesforce Chatter connector to:

Confirm your identity on East - Echelon Mgmt & Consulting [Change teams](#)

Access and modify information about your public channels [Show more](#)

Access information about your team [Show more](#)

Send messages as Salesforce Chatter connector [Show more](#)

Please only share your team's private information with apps that you have reviewed and trust.

Authorize

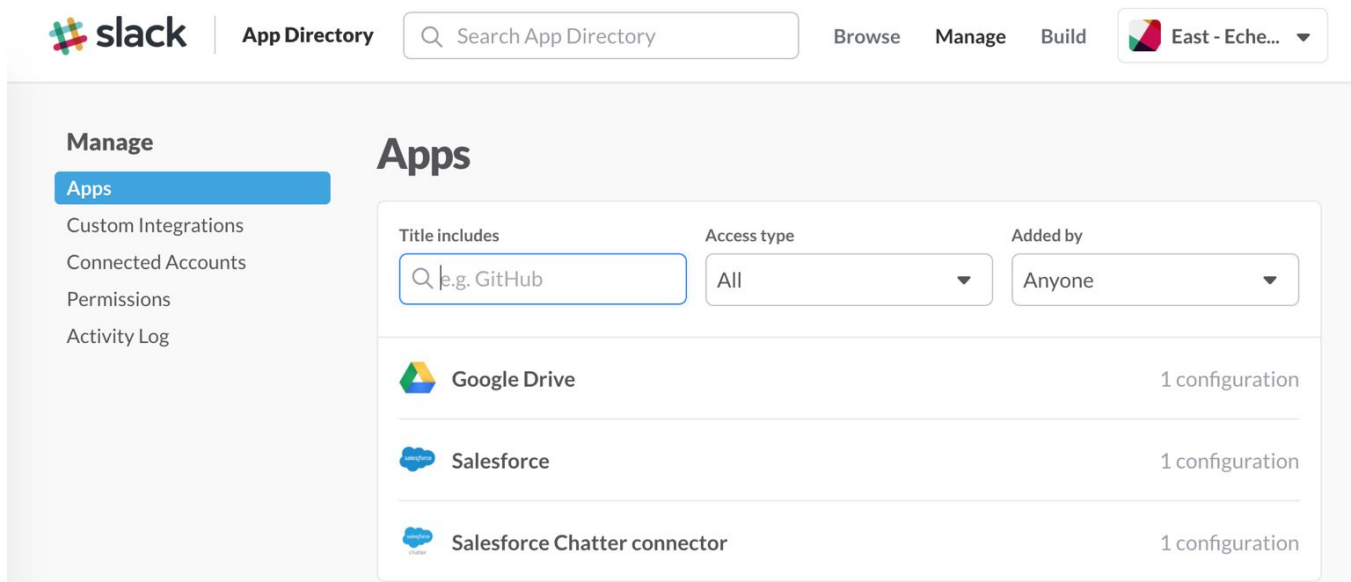
Cancel

You will need to refresh your Salesforce record page to see the effects.

Switching Slack Teams

If there is a need to switch from one Slack team to another, the OAuth process into Slack from Salesforce can be repeated and a new Slack team can be selected on the Slack OAuth page.

Remove the Chatter Connector integration from the Slack management via the Slack management web page:



The screenshot shows the Slack App Directory 'Manage' page. The top navigation bar includes the Slack logo, 'App Directory', a search bar, and buttons for 'Browse', 'Manage', and 'Build'. A user profile dropdown is visible on the right. The left sidebar shows 'Manage' with sub-links: 'Apps' (selected), 'Custom Integrations', 'Connected Accounts', 'Permissions', and 'Activity Log'. The main content area is titled 'Apps' and features a filter section with 'Title includes' (search bar), 'Access type' (dropdown set to 'All'), and 'Added by' (dropdown set to 'Anyone'). Below the filters, a table lists installed apps:

App Icon	App Name	Configurations
	Google Drive	1 configuration
	Salesforce	1 configuration
	Salesforce Chatter connector	1 configuration

Click on the “Salesforce Chatter Connector” app to navigate to the next page and click on the trashcan next to the configuration that you want to clear.


App Directory

Browse
Manage
Build


East - Eche...

[Browse Apps](#) > [Salesforce Chatter connector](#)



[Visit site](#)

[Report this app](#)

Salesforce Chatter connector

Slack conducts a brief review of apps in our App Directory and does not endorse or certify these apps.

Authorizations

Salesforce Chatter connector can:

- Confirm user's identity, granted by 1 team member
- Access information about user's public channels, granted by 1 team member
- Access information about your team, granted by 1 team member
- Modify your public channels, granted by 1 team member
- Send messages as Salesforce Chatter connector, granted by 1 team member

[janet](#) on November 1, 2016

Can confirm user's identity, access information about user's public channels, access information about your team, modify your public channels, and send messages as Salesforce Chatter connector.



Remove Application

Revoke all permissions and authorizations for this app.

[Remove App](#)

Once this is done, that user will be able to re-do the OAuth process in their Salesforce org and select another team. The user may have to sign in.



Salesforce Chatter connector would like access to your Slack team

Select your team

- 
East - Echelon Mgmt & Consulting
- 
Appiphony
- 
Sign in to another team

Salesforce Classic Setup

The Slack integration is supported in Classic Salesforce via the use of a custom visualforce quick action on the object page layout.

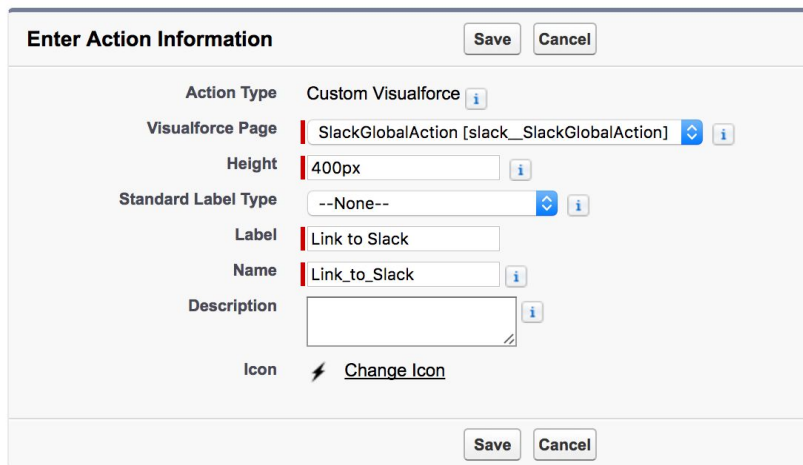
A “Global Action” needs to be created before the the Slack component can be made available on each record page in Salesforce Classic. After that it can be added as a Quick Action on the record page layout.

- Setup > Build > Create > Global Actions > Global Actions > New Action
(you will need to click on “Global Actions” twice)

Action Type:	Custom Visualforce
Visualforce Page:	SlackGlobalAction
Height:	400px
Label:	Link to Slack
Name:	Link_to_Slack

- Click ‘Save’ (See screenshot below)

Edit Global Action
Link to Slack



Add “Link to Slack” global action as a “Quick Action” on the page layout for each object:

- Setup > Build > Customize > Accounts or Contacts or Leads or Opportunities > Page Layouts > Edit

Account Page Layout

[Help for this Page](#)

This page allows you to create different page layouts to display Account data.
After creating page layouts, click the Page Layout Assignment button to control which page layout users see by default.

Account Page Layouts				
		New	Page Layout Assignment	
Action	Page Layout Name	Created By	Modified By	Feed-Based Layout
Edit Del	Account (Marketing) Layout	Stephen Hammond , 10/20/2016 1:36 PM	Stephen Hammond , 10/20/2016 1:36 PM	☐
Edit Del	Account (Sales) Layout	Stephen Hammond , 10/20/2016 1:36 PM	Stephen Hammond , 11/23/2016 1:40 PM	☐
Edit Del	Account (Support) Layout	Stephen Hammond , 10/20/2016 1:36 PM	Stephen Hammond , 10/20/2016 1:36 PM	☐
Edit Del	Account Layout	Stephen Hammond , 10/20/2016 1:36 PM	Stephen Hammond , 11/23/2016 1:41 PM	☐

- Select “Quick Actions” and drag ‘Link to Slack’ to the ‘Quick Actions in the Salesforce Classic Publisher’ section and click ‘Save’:

Account Layout

Custom Console Components Mini Page Layout Mini Console View | Video Tutorial Help for this Page

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields
Buttons
Custom Links
Quick Actions
Salesforce1 & Lightning Actions
Expanded Lookups
Related Lists

Quick Find Quick Action Name

File	Mobile Smart Actions	New Event	New Opportunity	Question
Link	New Account	New Group	New Task	
Link to Slack	New Case	New Lead	Poll	
Log a Call	New Contact	New Note	Post	

Account Sample

Highlights Panel

Customize the highlights panel for this page layout...

Quick Actions in the Salesforce Classic

Publisher

Post File New Task New Contact New Case Log a Call New Note New Opportunity New Event

Link Poll Question Link to Slack

NOTE: Even though this Global Action will also be available to the “Salesforce1 & Lightning Actions” section in the Global Layouts page and Salesforce1/Lightning Layouts sections in the page layout menu for each object, it should not be used. Use of the Slack lightning component is the intended experience for Salesforce Lightning.

Page 17

Global Layout [Video Tutorial](#) [Help for this Page](#)

Save Quick Save Cancel Undo Redo Layout Properties

Quick Actions

Salesforce1 & Lightning Actions

Quick Find Salesforce1 Action Name

File	Mobile Smart Actions	New Event	New Opportunity	Question
Link	New Account	New Group	New Task	
Link to Slack	New Case	New Lead	Poll	
Log a Call	New Contact	New Note	Post	

Global Publisher

Quick Actions in the Salesforce

Classic Publisher

Post File Link Poll

Salesforce1 and Lightning

Experience Actions

Post Link to Slack File Link Poll

Account Layout [Mini Page Layout](#) [Mini Console View](#) [Video](#)

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Buttons

Custom Links

Quick Actions

Salesforce1 & Lightning Actions

Expanded Lookups

Related Lists

Report Charts

Quick Find Field Name

Section	Account Owner	Annual Revenue	D
Blank Space	Account Site	Billing Address	D
Account Name	Account Source	Created By	D
Account Number	Active	Customer Priority	D

Account Sample

Highlights Panel

Customize the highlights panel for this page layout...

Quick Actions in the Salesforce

Classic Publisher

Post Link to Slack File Link Poll

Salesforce1 and Lightning

Experience Actions

Post Link to Slack File Link Poll Change Record Type

Sharing Get Contacts Send an Email Change Owner Submit for App

Include Offline Edit Check Clean Status Call Send Text Sen

View Website

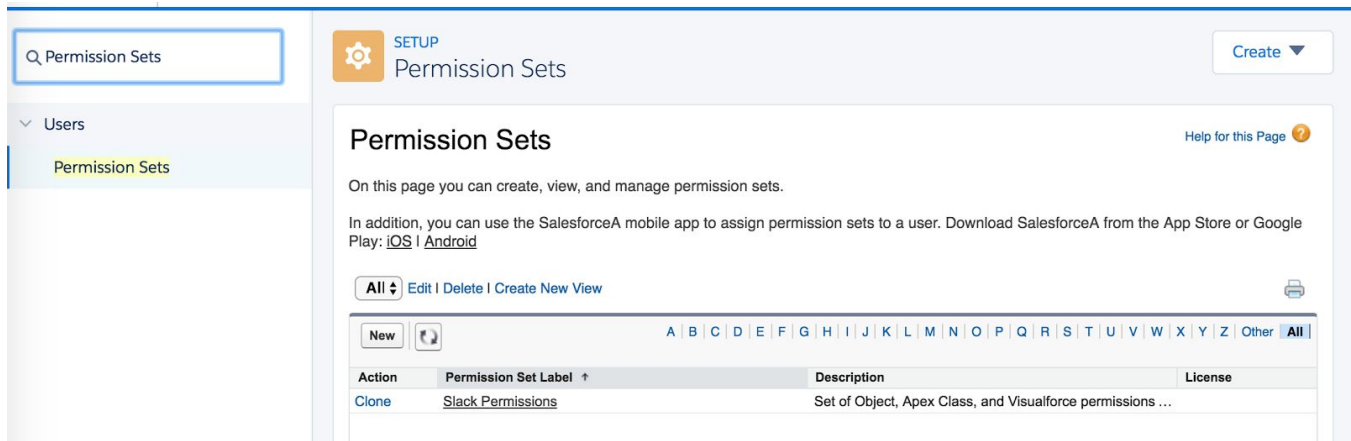
Salesforce User Setup, Permissions, & Multiple Users in Slack

Once the package is installed and the org is fully set up, the Administrator must assign the packaged “Slack Permissions” Permission Set to users so that they are able to use the Slack integration features.

The packaged “Slack Permissions” permission set includes the following:

- Create, Read, Edit, Delete, View All, Modify All for the “Slack Relationships” custom object
 - **NOTE: The object exists as a junction object to identify which Slack channels that are linked to, thus all users need full access to create, link, and unlink channels.**
- Access to the following Salesforce Apex Classes:
 - slack.PostToSlack
 - slack.SlackController
 - slack.SlackPostController
 - slack.Utilities
- Access to the follow VisualForce pages:
 - slack.Setup
 - slack.SlackGlobalAction

Navigate to Setup > Users > Permission Sets > Slack Permissions to get to the Permission Set menu



Q Permission Sets

SETUP Permission Sets

Create

Permission Sets

On this page you can create, view, and manage permission sets.

In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#) | [Android](#)

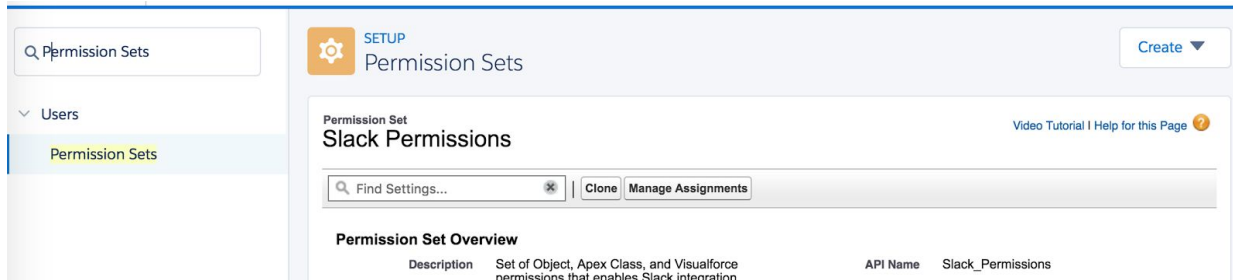
All | Edit | Delete | Create New View

New

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

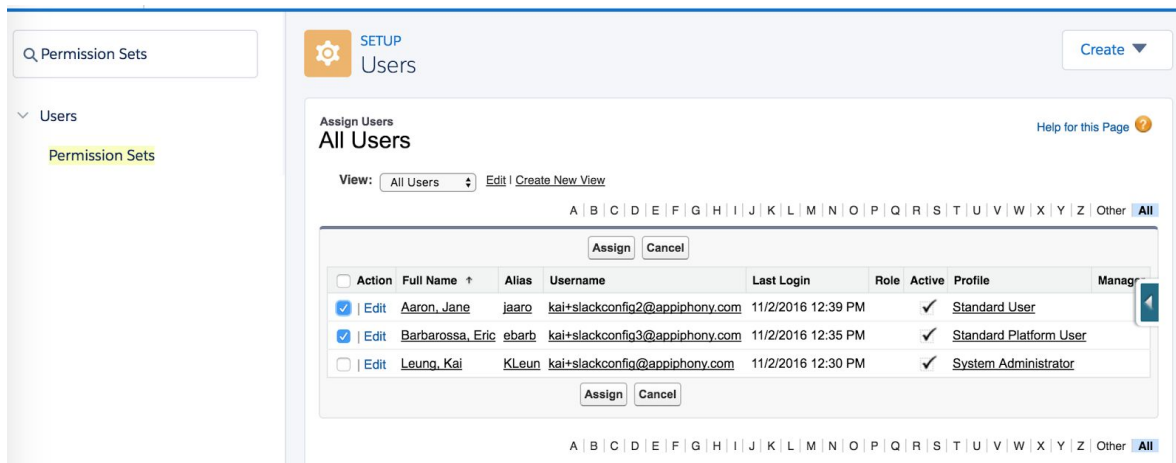
Action	Permission Set Label	Description	License
Clone	Slack Permissions	Set of Object, Apex Class, and Visualforce permissions ...	

From that menu, click on 'Manage Assignments'



The screenshot shows the Salesforce Setup interface. On the left sidebar, under 'Users', the 'Permission Sets' link is highlighted. The main content area is titled 'SETUP Permission Sets' and includes a 'Create' button. Below this, the 'Slack Permissions' permission set is displayed. A search bar labeled 'Find Settings...' is present, with 'Clone' and 'Manage Assignments' buttons to its right. The 'Permission Set Overview' section shows the description: 'Set of Object, Apex Class, and Visualforce permissions that enables Slack integration' and the API Name: 'Slack_Permissions'.

Click 'Add Assignments' to assign the permission set to the desired users and save your changes.



The screenshot shows the Salesforce Setup interface for 'Assign Users'. The left sidebar shows 'Users' and 'Permission Sets'. The main content area is titled 'SETUP Users' and includes a 'Create' button. Below this, the 'Assign Users' section is displayed, showing 'All Users'. A 'View:' dropdown is set to 'All Users', with links for 'Edit' and 'Create New View'. A navigation bar with letters A through Z and 'All' is visible. Below this, a table lists users with columns for Action, Full Name, Alias, Username, Last Login, Role, Active, Profile, and Manage. The table contains three rows of user data.

Action	Full Name	Alias	Username	Last Login	Role	Active	Profile	Manage
☒ Edit	Aaron, Jane	jaaro	kai+slackconfig2@appiphony.com	11/2/2016 12:39 PM		✓	Standard User	
☒ Edit	Barbarossa, Eric	ebarb	kai+slackconfig3@appiphony.com	11/2/2016 12:35 PM		✓	Standard Platform User	
☐ Edit	Leung, Kai	KLeun	kai+slackconfig@appiphony.com	11/2/2016 12:30 PM		✓	System Administrator	

With this App, OAuth is on a PER USER basis, **which means that each user needs to complete the OAuth steps in Sections 6 and 8 before they can post to/from slack, link channels, etc.** When multiple users are connected to the same Slack Team, there will be multiple entries in the Salesforce Chatter Connector in the Slack web manager:


App Directory

Browse
Manage
Build


East - Eche...

[Browse Apps](#) > [Salesforce Chatter connector](#)



[Visit site](#)

[Report this app](#)

Salesforce Chatter connector

Slack conducts a brief review of apps in our App Directory and does not endorse or certify these apps.

Authorizations

Salesforce Chatter connector can:

- Confirm user's identity, granted by 2 team members
- Access information about user's public channels, granted by 2 team members
- Access information about your team, granted by 2 team members
- Modify your public channels, granted by 2 team members
- Send messages as Salesforce Chatter connector, granted by 2 team members

[george](#) on November 1, 2016

Can confirm user's identity, access information about user's public channels, access information about your team, modify your public channels, and send messages as Salesforce Chatter connector.



[janet](#) on November 1, 2016

Can confirm user's identity, access information about user's public channels, access information about your team, modify your public channels, and send messages as Salesforce Chatter connector.



Remove Application

Revoke all permissions and authorizations for this app.

[Remove App](#)

Troubleshooting Considerations and Tips

Administrators and regular Salesforce users might encounter problems that are caused by a botched configuration rather than a bug. Here is a short checklist of common issues:

- ☐ The org has a custom domain.
- ☐ The custom domain has been deployed to users.
- ☐ Chatter is Enabled.
- ☐ 'Enable Actions in the Publisher' is checked in Chatter Settings.
- ☐ The latest version of the Slack salesforce package has been installed successfully.
- ☐ The user has OAuth'ed into Salesforce correctly
- ☐ The user has OAuth'ed into Slack correctly
- ☐ The 'Slack Permissions' permission set has been assigned to the user
- ☐ The 'Link to Slack' global action has been created correctly, using the correct Visualforce Page
- ☐ 'Link to Slack' global action added to the correct Salesforce Classic Quick Actions Publisher
- ☐ The 'Send Chatter Post to Slack' Process is still Active in Process builder
Can be found in Setup >> Process Automation >> Process Builder

Process Builder					← Back To Setup	? Help
 My Processes 1 items					New	
PROCESS ▲	DESCRIPTION	LAST MODIFIED	STATUS	ACTIONS		
▼ Send Chatter Post to Slack						
Version 1: Send Chatter Post to Slack		11/2/2016	Active	Deactivate		