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# Pardot Slack Connector (BETA)

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# PARDOT SLACK CONNECTOR IMPLEMENTATION GUIDE (BETA)

The Pardot Slack connector (beta) is available to Salesforce customers who use both Pardot and Slack. After you install the connector, marketing users can add completion actions to notify a Slack channel when a prospect interacts with a Pardot marketing asset. You designate which channels to use when you set up the connector.

-  **Note:** This feature is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at [Agreements and Terms](#).

## [Considerations for Setting Up the Slack Connector \(Beta\)](#)

The setup process includes creating a Slack app. Depending on how your organization is structured, it's possible you need a developer, a Slack workspace admin, and a Pardot admin to complete the process.

### [Create and Install a Slack App](#)

Create a Slack app to connect to Pardot and install it in your Slack workspace.

### [Opt In to the Beta](#)

Before you can access the Slack connector, opt in to the beta in Pardot settings.

### [Add the Slack Connector](#)

After you opt in to the beta, the Slack connector is available on the Connectors page in Pardot settings.

### [Sending Slack Notifications as Completion Actions](#)

After the connector is verified, the completion action to notify a Slack channel is available for Pardot marketing assets. You can add the completion action to Pardot forms, form handlers, file downloads, custom redirects, page actions, and Pardot Classic emails. It isn't available in the Pardot Email Experience.

## EDITIONS

Available in: All Pardot Editions

## Considerations for Setting Up the Slack Connector (Beta)

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The setup process includes creating a Slack app. Depending on how your organization is structured, it's possible you need a developer, a Slack workspace admin, and a Pardot admin to complete the process.

- The Pardot Slack connector is a beta feature and is available only in English.
- The connector setup is available only in the Pardot Lightning App (PLA). If you're not using PLA, [download the Pardot Lightning App Implementation Guide](#) to enable it for your org.
- For this beta release, you can connect one Slack workspace to Pardot, and add up to 10 Slack channels.
- The completion action to notify a Slack channel is available for Pardot forms, form handlers, file downloads, custom redirects, page actions, and Pardot Classic emails. It isn't available in the Pardot Email Experience.

## EDITIONS

Available in: All Pardot Editions

# Create and Install a Slack App

Create a Slack app to connect to Pardot and install it in your Slack workspace.

1. Create a basic Slack app and install it in your workspace: [Basic App Setup for Slack](#).

We recommend creating the app from an app manifest, but you can create your own. To create an app from a manifest, copy this JSON code for the manifest file:

## USER PERMISSIONS

To create a Slack app and install it in a workspace:

- Slack workspace admin

```
{
  "display_information": {
    "name": "Pardot Slack Integration"
  },
  "features": {
    "app_home": {
      "messages_tab_enabled": true,
      "messages_tab_read_only_enabled": true
    },
    "bot_user": {
      "display_name": "Pardot Slack Integration",
      "always_online": false
    }
  },
  "oauth_config": {
    "scopes": {
      "bot": [
        "channels:read",
        "chat:write.public",
        "chat:write"
      ]
    }
  }
}
```

If you create your own app, make sure that it has these exact scopes only, which are needed for the beta to work correctly. Additional scopes could grant more access to your Slack workspace than is necessary.

- channels:read
  - chat:write.public
  - chat:write
2. Save the Slack bot user oauth token provided after you install the app.

You need the token to complete the connector setup in Pardot. We recommend keeping the browser window with your token open so that you can easily copy it when you're ready.

## Opt In to the Beta

Before you can access the Slack connector, opt in to the beta in Pardot settings.

1. In the Lightning app, select **Pardot Settings**.
2. Click **Edit**.
3. Scroll to Pardot Slack Connector (BETA), and select **Try the Pardot Slack Connector** to opt in.

After you opt in to the beta, add the Slack connector on the Connectors page in Pardot Settings.

### EDITIONS

Available in: All Pardot Editions

### USER PERMISSIONS

To access Pardot settings:

- Pardot Administrator role

## Add the Slack Connector

After you opt in to the beta, the Slack connector is available on the Connectors page in Pardot settings.

1. In the Lightning app, select **Pardot Settings**, and then select **Connectors**.
2. Click **Add Connector**, and select **Slack**.
3. On the connector setup page, click **Add Workspace**.
4. Paste the bot token for the Slack app that you created.
5. Verify the bot token, and save your work.
6. On the Channels tab, click **Add Channel**.
7. In the Slack app, right-click the name of your channel in the sidebar and select **Copy Link**. Make sure that the channel is public and not read-only.
8. In Pardot, paste the link for the Slack channel.
9. Verify the channel URL, and then save your work.
10. To add more channels, repeat steps 7 through 10.

After you add a verified workspace and at least one channel, the Slack connector displays as verified on the Connectors page in Pardot settings.

### EDITIONS

Available in: All Pardot Editions

### USER PERMISSIONS

To add a connector in Pardot settings:

- Pardot Administrator role

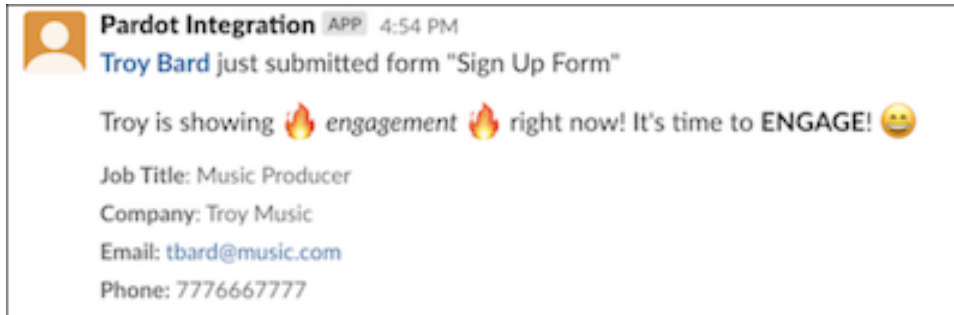
## Sending Slack Notifications as Completion Actions

After the connector is verified, the completion action to notify a Slack channel is available for Pardot marketing assets. You can add the completion action to Pardot forms, form handlers, file downloads, custom redirects, page actions, and Pardot Classic emails. It isn't available in the Pardot Email Experience.

When marketing users set up the completion action, they select which Slack channel to notify. They also have the option to include a custom message with the notification. The custom message can be further personalized with merge fields and [formatted for Slack with markdown](#).

### EDITIONS

Available in: All Pardot Editions



In addition to the custom message, the notification includes this prospect information:

- Name
- Job Title
- Company
- Email
- Phone

If there is no prospect data available for a field, it appears blank in the Slack message.

SEE ALSO:

[Completion Actions](#)