

Send Slack Notifications with Completion Actions

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INTRODUCTION

Connect Account Engagement and Slack to automate tasks and notify your teams when prospects interact with your marketing assets. After you install the Marketing Cloud Account Engagement app in your Slack workspace and set up the connector in Account Engagement, the completion action to notify a Slack channel is available on your marketing assets. Use this guide to help you set up the integration.

EDITIONS

Available in: All Account Engagement Editions

Available for use where approved by a workspace admin and installed in Slack

Before You Begin

Before installing the app in Slack or setting up the connector in Account Engagement, complete these tasks in Salesforce Setup. If you skip these steps, the app installation fails and the connector can't be verified.

- [Enable Salesforce for Slack Integrations](#).
- Assign the Connect Salesforce to Slack permission to your Slack workspace admin. You can create a permission set for Slack or add the permission to an existing custom permission set.

Upgrading from Beta

If you participated in the beta version, enable Salesforce for Slack and assign the required permission in Setup. Then install the Account Engagement app in Slack and follow the prompts in Account Engagement to upgrade your Slack connector. The completion actions that you added during the beta remain intact after you upgrade. After you install the new app and upgrade your connector, you can delete the custom app that you created for the beta.

The upgrade connects to the same Slack workspace that you used for the beta. To connect a different workspace, remove the Slack connector, follow the steps to set up the generally available version, and add your completion actions again.

SEE ALSO:

[Salesforce Help: Enable or Disable Slack for Salesforce](#)


[Salesforce Help: Create Permission Sets](#)

[Salesforce Help: Manage Permission Set Assignments](#)

[Salesforce Help: Add Apps in Your Personal Slack Sidebar](#)

INSTALL MARKETING CLOUD ACCOUNT ENGAGEMENT FOR SLACK

To use the Slack completion action, the Slack admin installs the Account Engagement app in the Slack workspace. Individual users don't need to add the app to use the completion action. The app is available in the Slack app directory.

 **Important:** Make sure that Slack is enabled in your Salesforce org and that you have the Connect Salesforce with Slack user permission.

1. Open the Slack app directory page for [Marketing Cloud Account Engagement](#).
2. Click **Add to Slack**.
3. Follow the prompts to install the app.

After the app is installed in your workspace, contact your Account Engagement admin to complete the connector setup.

EDITIONS

Available in: All Account Engagement Editions

Available in: Slack (where approved by a workspace admin)

USER PERMISSIONS

To install a Slack app:

- Slack workspace admin

To authenticate to Salesforce from Slack:

- Connect Salesforce with Slack

ADD THE SLACK CONNECTOR

To complete the Slack integration, add the Slack connector in Account Engagement settings.

1. In the Lightning app, select **Account Engagement Settings**, and then select **Connectors**.
2. Click **Add Connector**, and select **Slack**.
3. On the connector setup page, click **Add Workspace**.
4. Select the workspace that the Account Engagement app is installed in, and click **Add Workspace**.
5. On the Channels tab, click **Add Channel**.
6. In the Slack app, right-click your channel in the sidebar, and select **Copy Link**. The channel must be public and not read-only.
7. On the Channels tab in Account Engagement, paste the link for the Slack channel.
8. Verify the channel URL, and then save your work.
9. To add more channels, repeat steps 5 through 9.

After you add a verified workspace and at least one channel, the Slack connector displays as verified on the Connectors page in Account Engagement settings. As your team adds the Slack completion action to assets, the actions and associated assets show on the Usage tab for the Slack connector. You can see the asset name, designated channel, trigger, and other information.

EDITIONS

Available in: All Account Engagement Editions

Available in: Slack (where approved by a workspace admin)

SLACK INTEGRATION COMPLETION ACTION

After the connector is verified, the completion action to notify a Slack channel is available for Account Engagement marketing assets. You can add the completion action to forms, form handlers, file downloads, custom redirects, and page actions. It's also available for classic and enhanced emails. After a user adds the Slack completion action to an asset, you can see the details on the Usage tab for the Slack connector.

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, personalize it with merge fields, and [formatted for Slack with markdown](#).

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

- Name
- Job Title
- Company
- Email
- Phone

If data isn't available for a field, it appears blank in the Slack message. Each custom message can have up to 3,000 characters, including the field values automatically populated with Account Engagement data. Messages that are longer than 3,000 characters don't render in Slack.

In Account Engagement settings, the Slack connector page's usage tab lists the assets that have the completion action added. To delete or replace the workspace associated with your Slack connector, first remove the completion actions from all the assets list on the usage tab.

EDITIONS

Available in: All Account Engagement Editions

Available in: Slack (where approved by a workspace admin)

DISCONNECT FROM SLACK

You can disconnect the Slack integration by deleting your workspace and channel details in Account Engagement and then deleting the connector.

1. Reference the Usage tab for the Slack connector and remove the Slack completion action from all Account Engagement assets.
2. In the Account Engagement Lightning app, select **Account Engagement Settings**, and then **Connectors**.
3. For the Slack connector, click the ⚙ icon and select **Edit**.
4. On the Channels tab, click the action menu for a channel and select **Delete**. Repeat this step to delete all the channels from your connector.
5. On the Workspace tab, click the action menu for your workspace and select **Delete**.
6. Click **Connectors**, and then click the ⚙ icon for the Slack connector and select **Delete**.

To completely disconnect Salesforce and Slack, remove the Account Engagement app from your Slack workspace and disable Slack in Salesforce Setup. To reconnect or connect with a new workspace, complete the setup process again.

SEE ALSO:

[Salesforce Help: Enable or Disable Salesforce for Slack Integrations](#)

EDITIONS

Available in: All Account Engagement Editions

Available in: Slack (where approved by a workspace admin)

USER PERMISSIONS

To disconnect the Slack connector:

- Account Engagement Administrator role