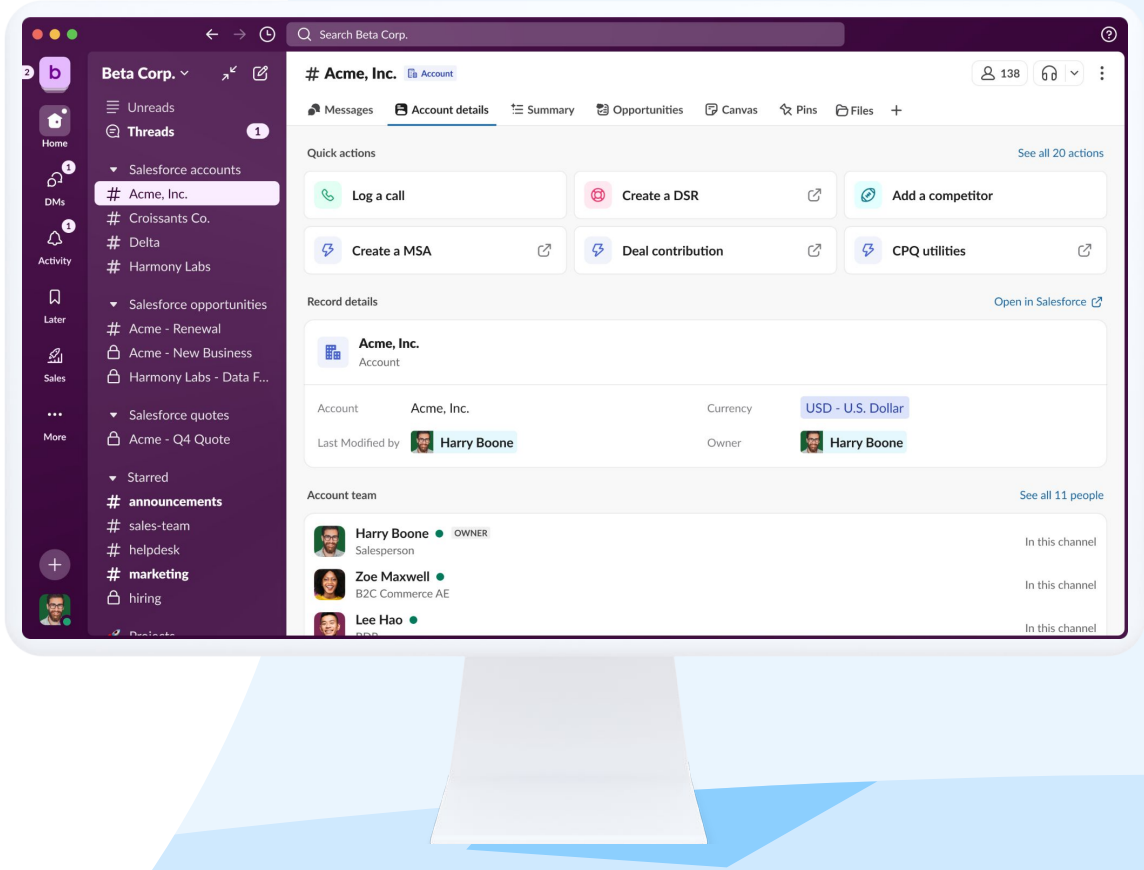
slack
from Salesforce

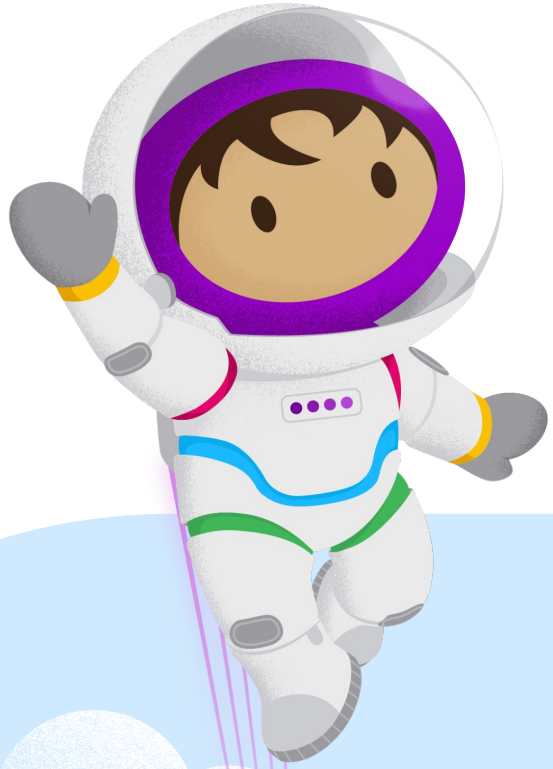
Salesforce Channels 101: Getting Started



Agenda

slack from Salesforce

1. **What are Salesforce channels?** Learn more ▸
2. **Navigating the interface** Learn more ▸
   - Understanding Slack Learn more ▸
   - Create a Salesforce channel Learn more ▸
   - UI walkthrough Learn more ▸
3. **Use cases overview** Learn more ▸
4. **Best practices & FAQ** Learn more ▸



slack
from Salesforce

1

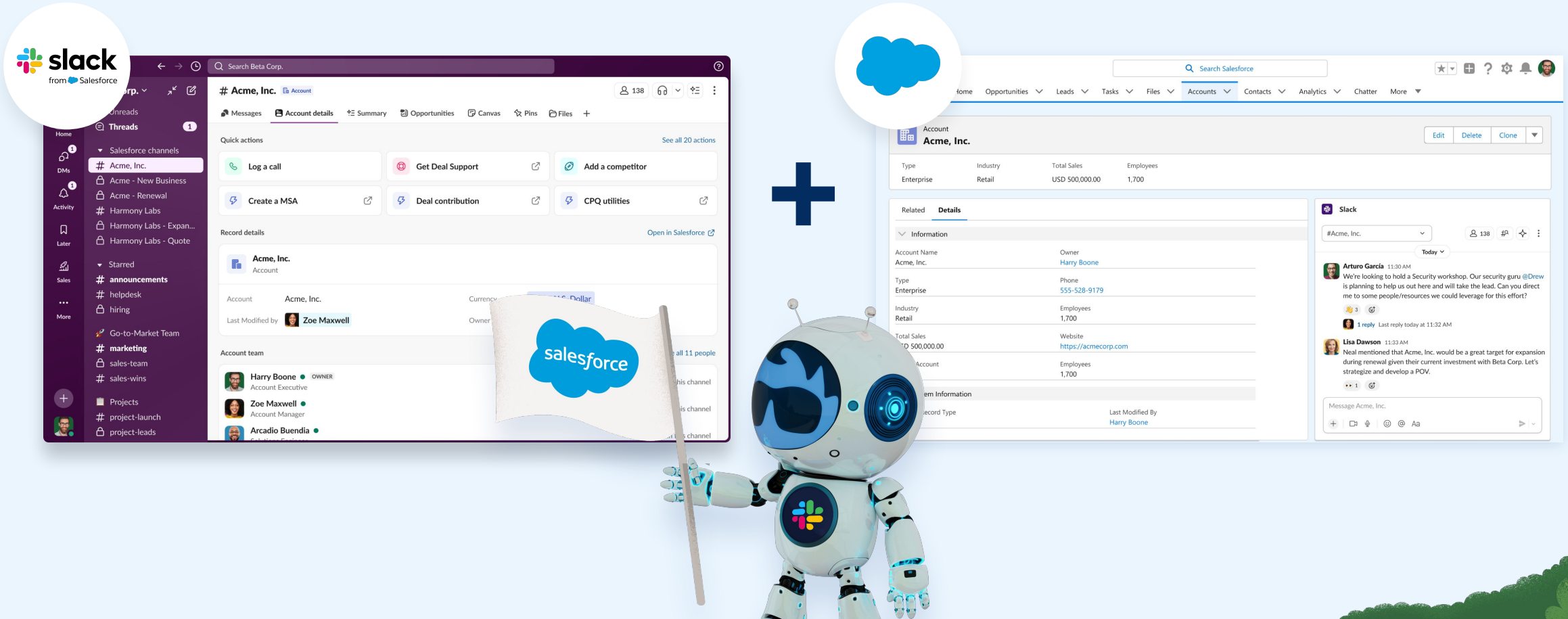
What are Salesforce channels?

slack from Salesforce

Say hello to

Salesforce channels

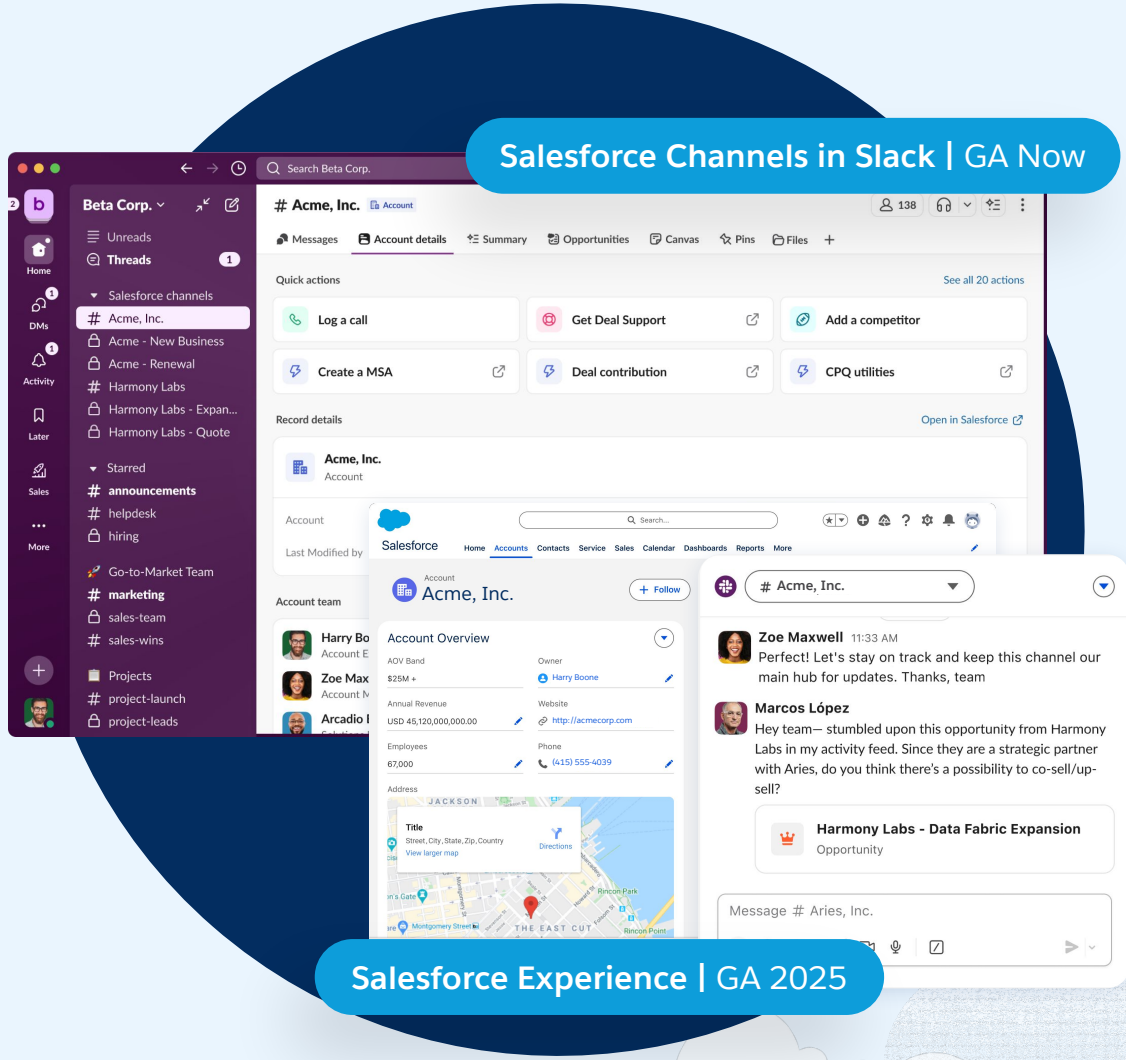
Where **data meets dialogue** to transform customer success



Salesforce Channels

slack from Salesforce

Channels built in Slack and available in Salesforce, like account or opportunity channels, that bring **CRM data** together with related customer-focused **conversations** happening in Slack, giving teams the most **complete and actionable view** of every customer.



Salesforce channels drive better results

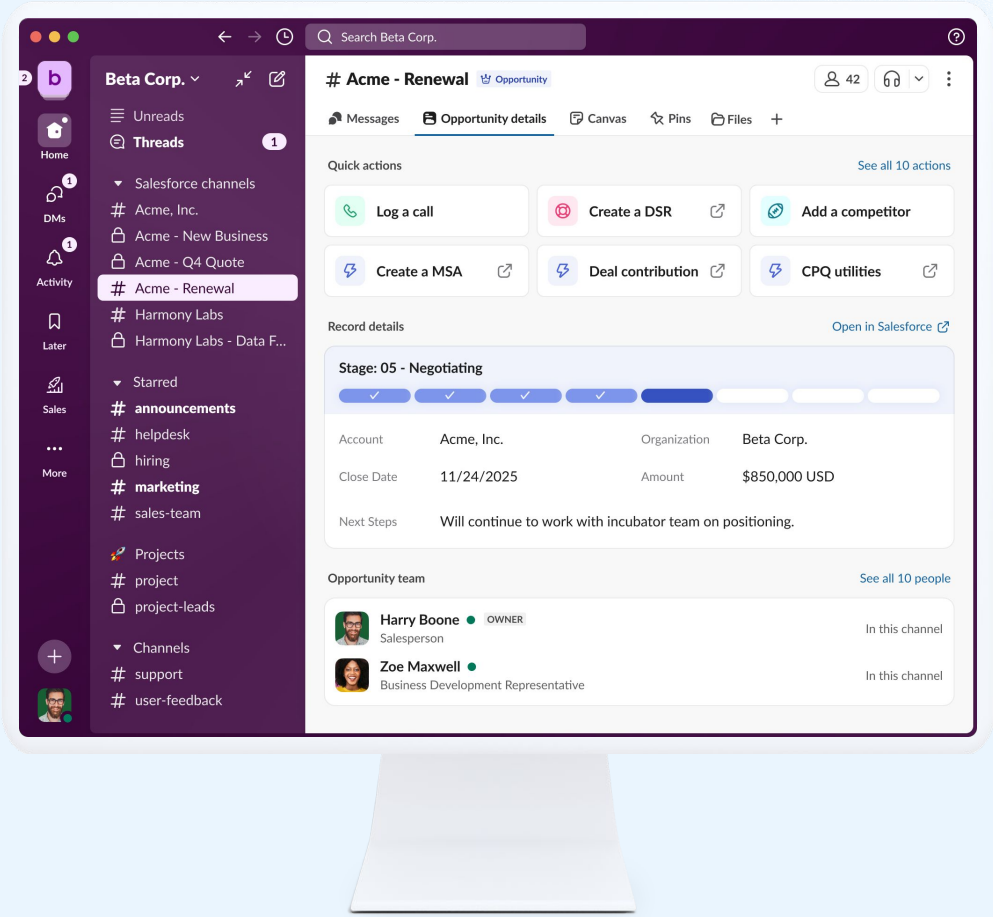
slack from Salesforce

Serve customers better
with collaboration grounded in CRM data

Accelerate business growth
by bringing CRM data into conversations to drive faster decision-making

Unlock deeper, actionable AI insights
with Slack AI* and Agentforce* fueled by structured and unstructured data

Maintain data security
with user permissions inherited from Salesforce



* License required

slack
from Salesforce

2

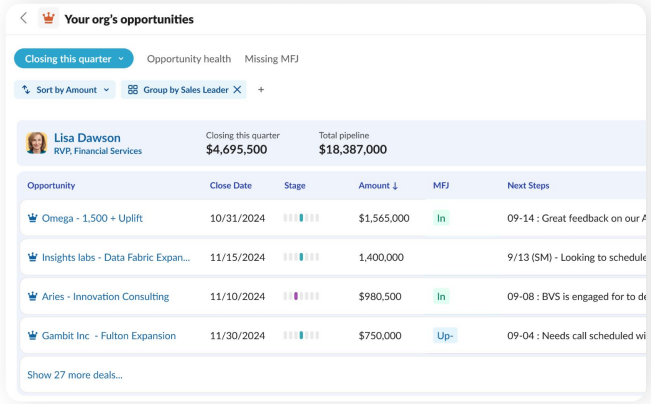
Navigating the interface

Understanding Slack

slack from Salesforce

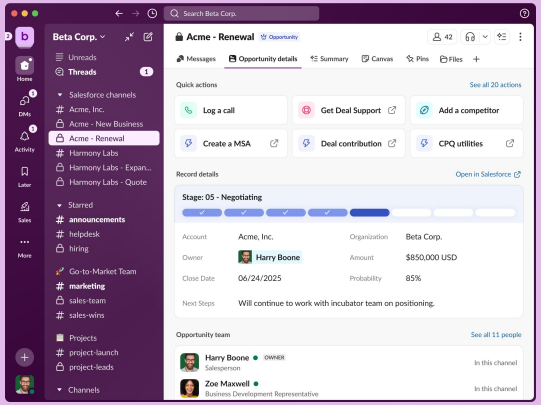
3 key product features working together to unlock productivity

Slack Sales Elevate



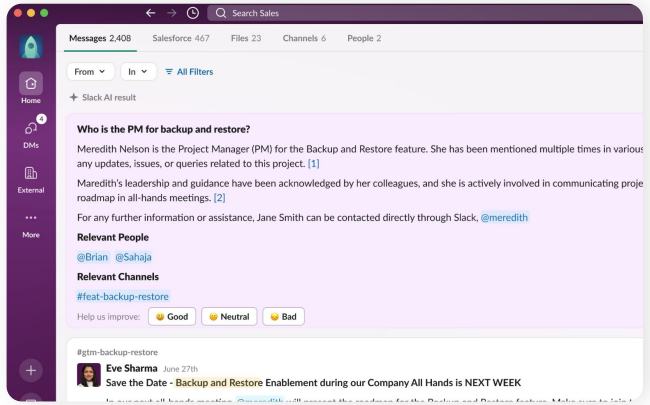
View and update your CRM plus see and act on changes

Salesforce channels*



Have team conversations on your CRM records

Slack AI**



Talk with your CRM and get instant insights in Slack

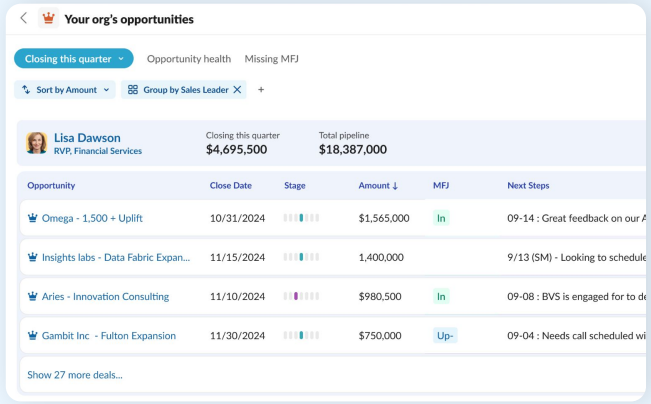
STRONGER TOGETHER

*Available today for Slack Sales Elevate customers | ** Slack AI: All paid plans in English, Spanish and Japanese | ** Agentforce in Slack: GA 2025

How to get these Slack features

A license is required to use these 3 features

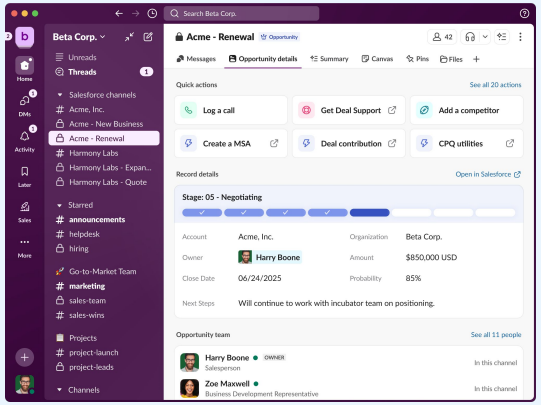
Slack Sales Elevate



View and update your CRM plus see and act on changes

Requires a license

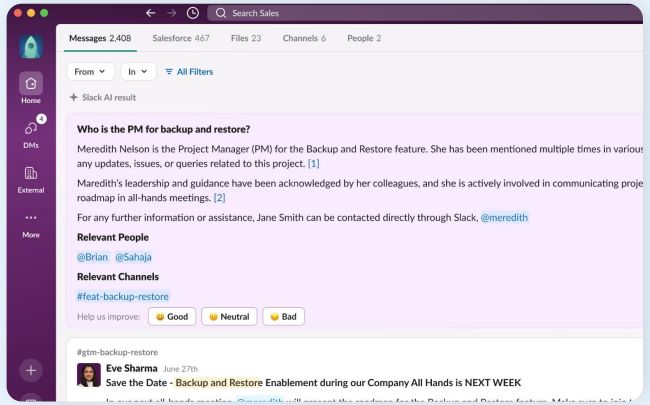
Salesforce channels*



Have team conversations on your CRM records

Included in Sales Elevate license

Slack AI**



Talk with your CRM and get instant insights in Slack

Requires a license

*Available today for Slack Sales Elevate customers | ** Slack AI: All paid plans in English, Spanish and Japanese | ** Agentforce in Slack: GA 2025

How do you know you have it?

If your company has purchased it and your admin has finished the setup, here's what you can expect to see:



You have Slack Sales Elevate if:

You see a "**rocket**" icon on the Slack left sidebar to access the **Sales dashboard**



You have Salesforce Channels if:

You find the option to "**Create Channel**" when viewing a record in Slack

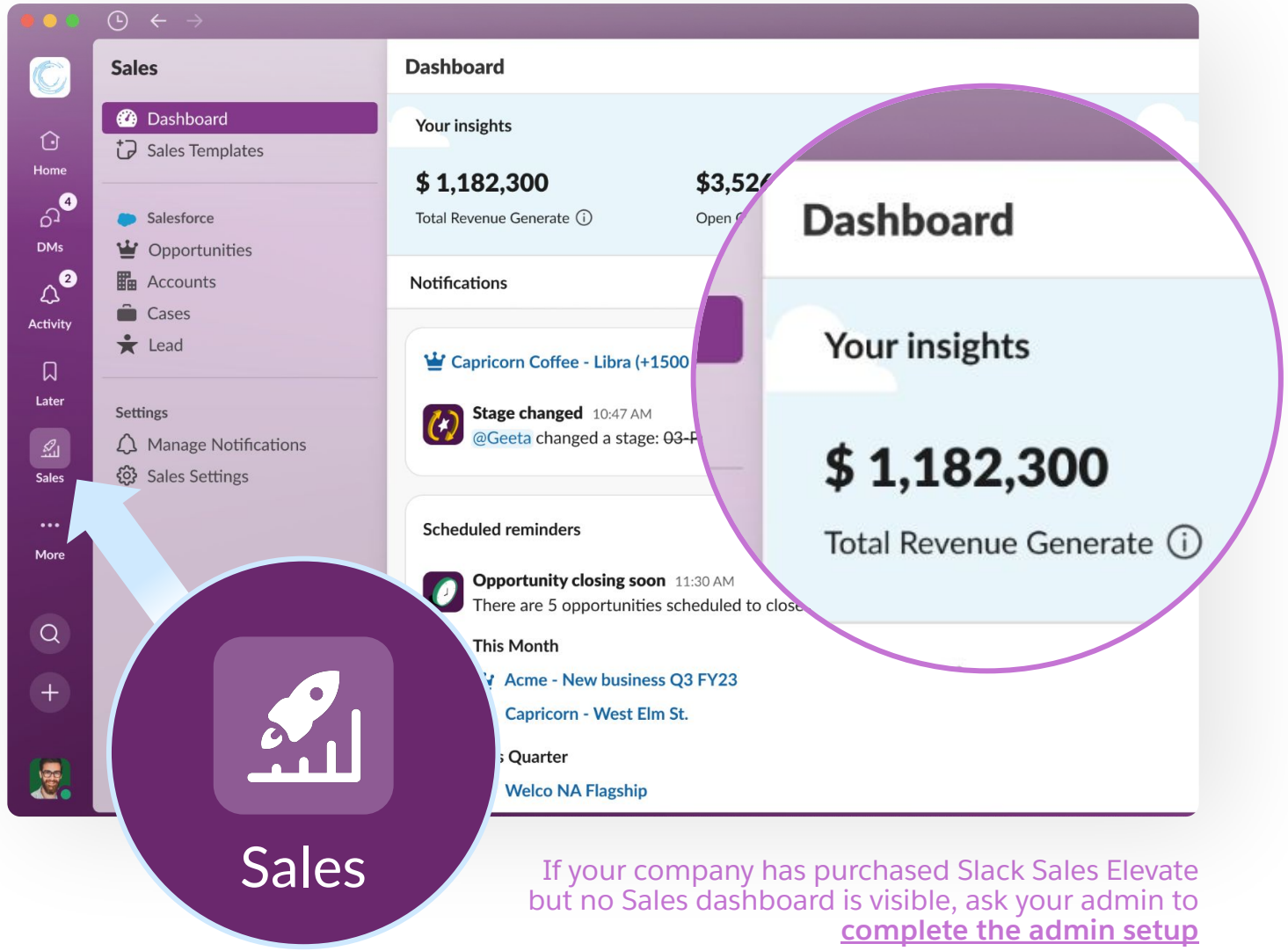


You have Slack AI if:

When opening a channel, you can see a "**sparkle**" icon in the top right to **summarize channel**

Slack Sales Elevate is set up if:

You can see a “**rocket**” icon on the left sidebar of your Slack app to access the **Sales dashboard**

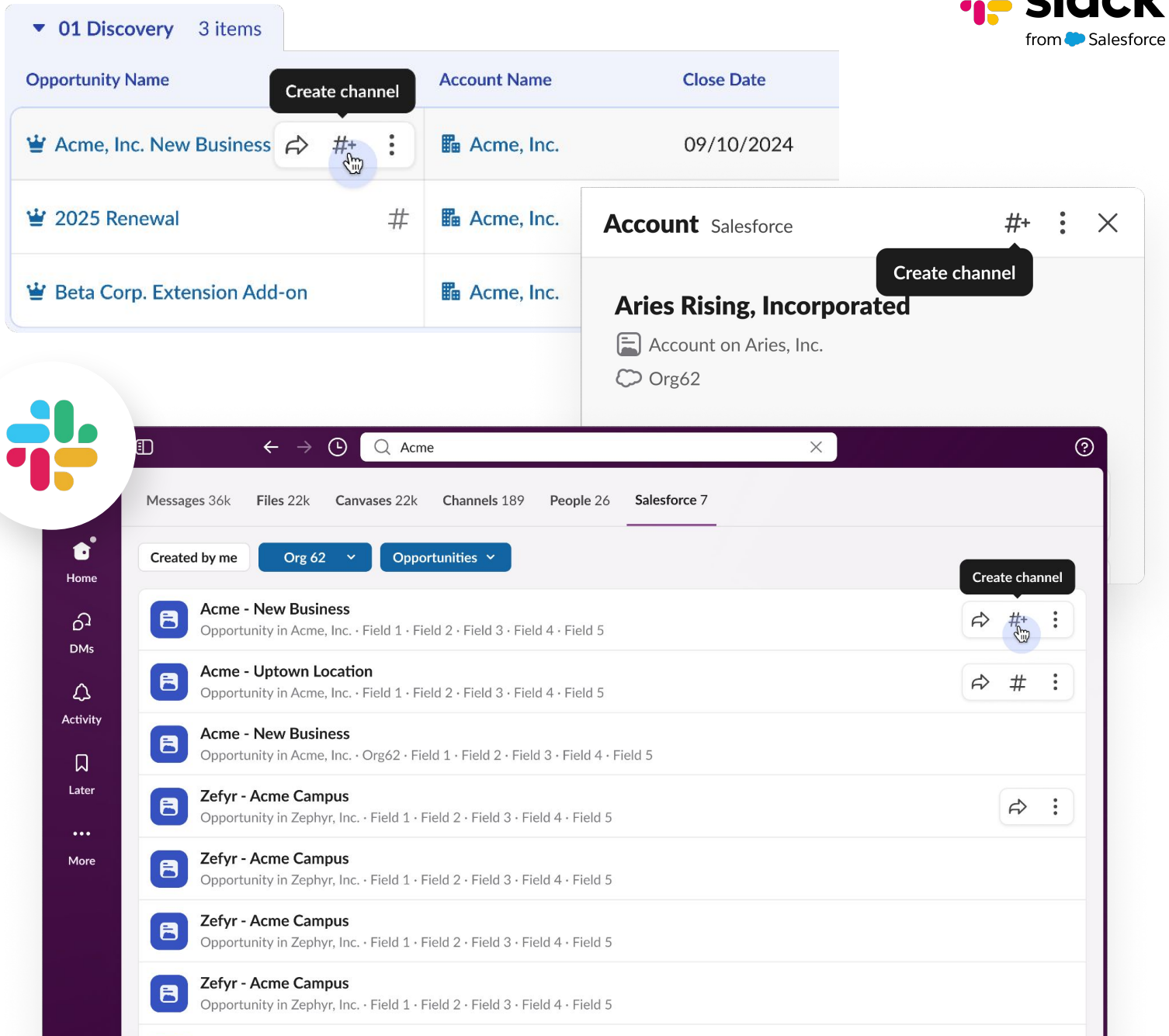


If your company has purchased Slack Sales Elevate but no Sales dashboard is visible, ask your admin to **complete the admin setup**

Salesforce channels are set up if:

You can find the option to “**Create Channel**” when viewing a record in Slack

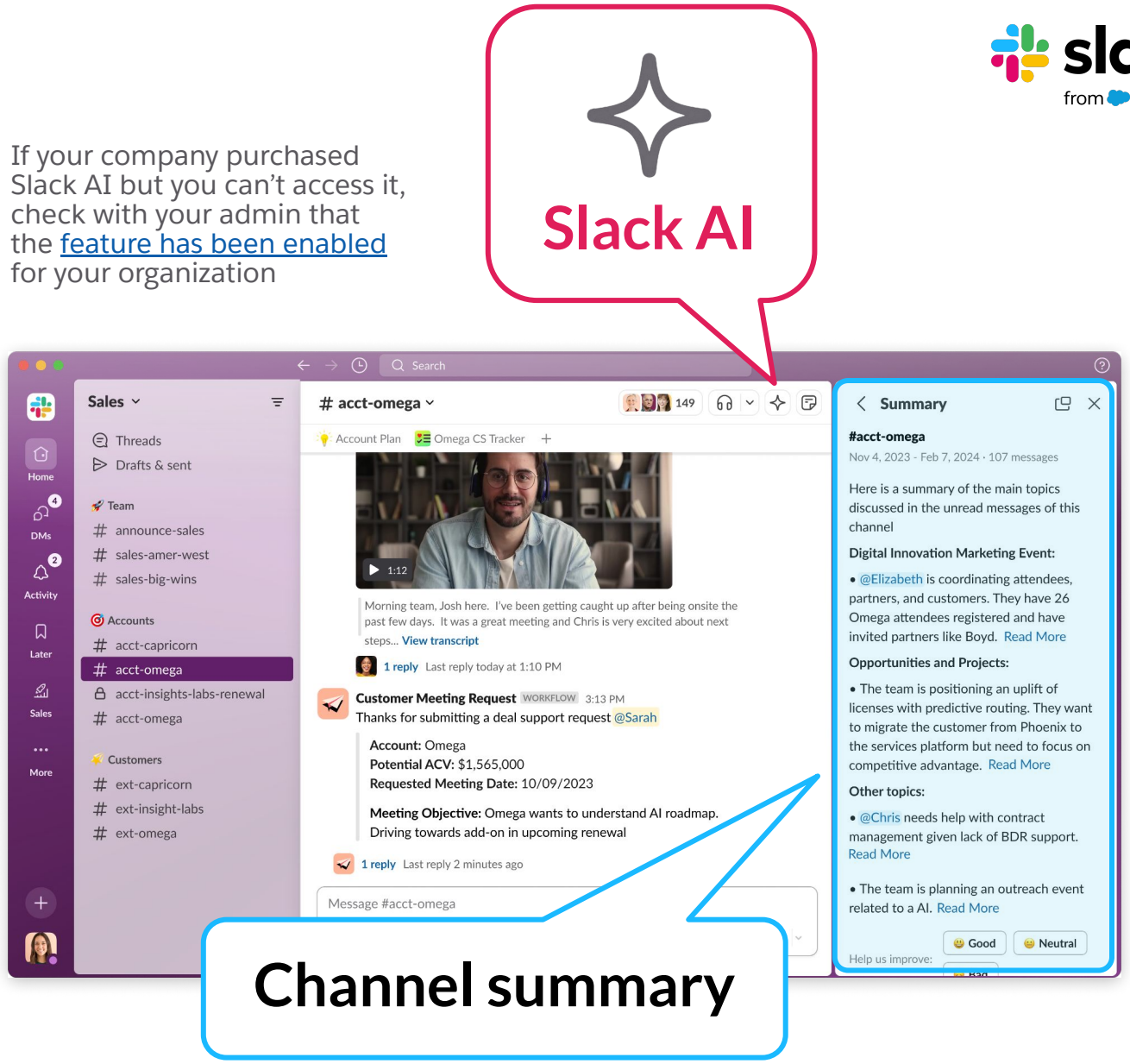
If you can’t create or view Salesforce channels in Slack, check if your admin has completed the setup and learn how to use them with this Help Center article



Slack AI is set up if:

When opening a channel, you can see a “**sparkle**” icon in the top right to “**summarize channel**”

If your company purchased Slack AI but you can’t access it, check with your admin that the feature has been enabled for your organization



Questions about access?

Contact your Slack admin or ask for help at slack.com/help



Reach out to your Slack admin

to check the setup



Ask for help

at slack.com/help



Admin action required:

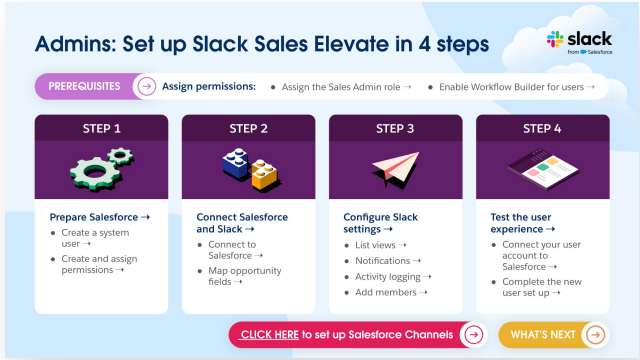
Ask your Slack admin to complete the admin setup for both **Slack Sales Elevate** and **Salesforce channels**, if they haven't already

To use Salesforce channels, your Slack admin must set up:

slack from Salesforce

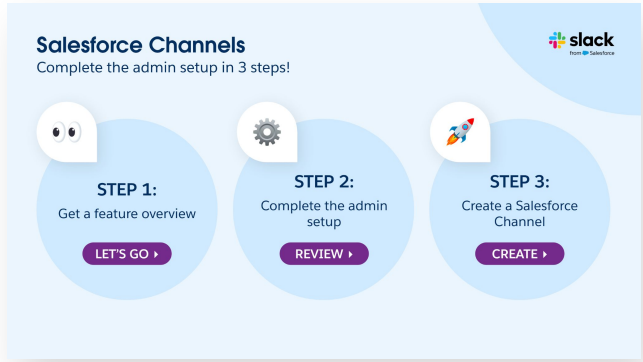
BOTH

Slack Sales Elevate



+

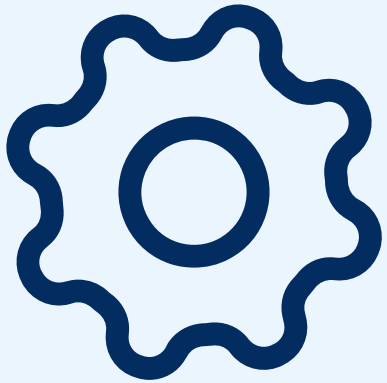
Salesforce channels



DOWNLOAD ADMIN SETUP GUIDE

https://slack.com/salesforce-channels-admin-setup-guide

slack
from Salesforce



Ask your Slack admin

to complete the admin setup if they haven't already!

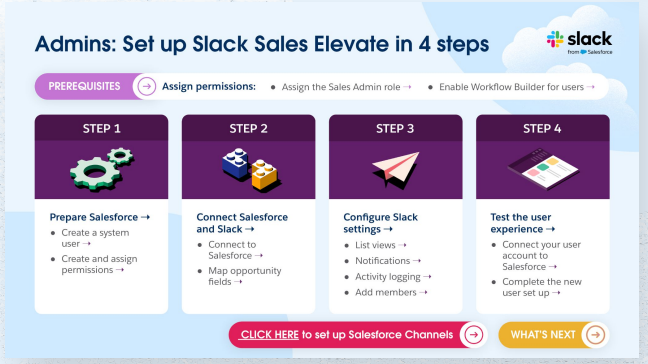
DOWNLOAD ADMIN SETUP GUIDE

https://slack.com/salesforce-channels-admin-setup-guide

slack from Salesforce

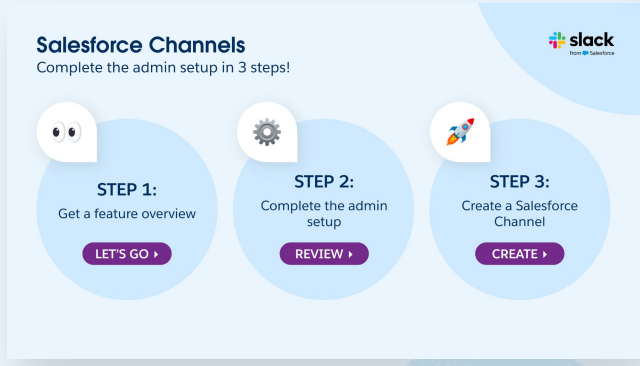
Once setup is complete, you'll be able to create a Salesforce channel in Slack!

Slack Sales Elevate



+

Salesforce channels



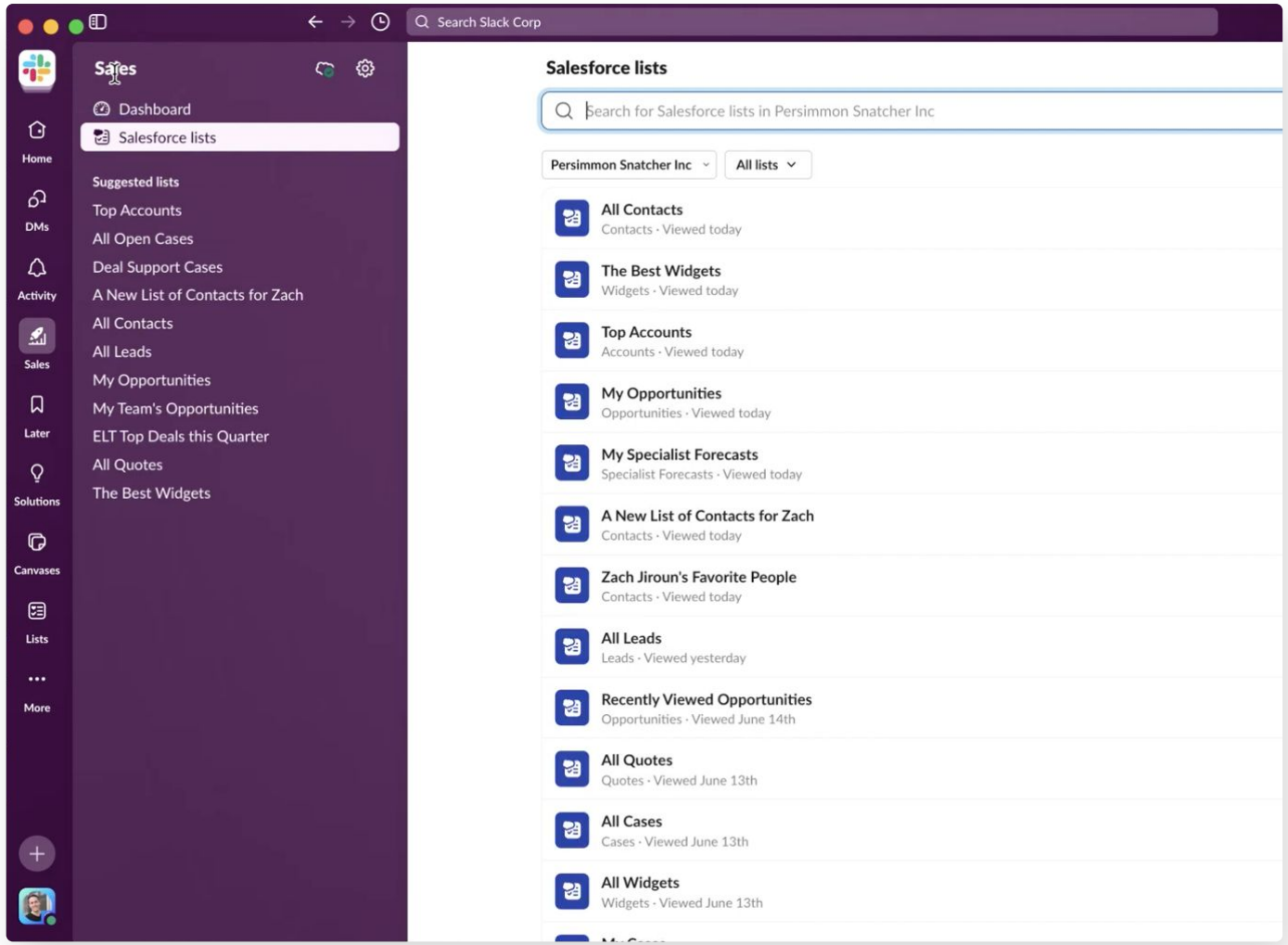
CREATE A SALESFORCE CHANNEL

https://slack.com/help/articles/32664824986259

Create a Salesforce channel

Sales dashboard

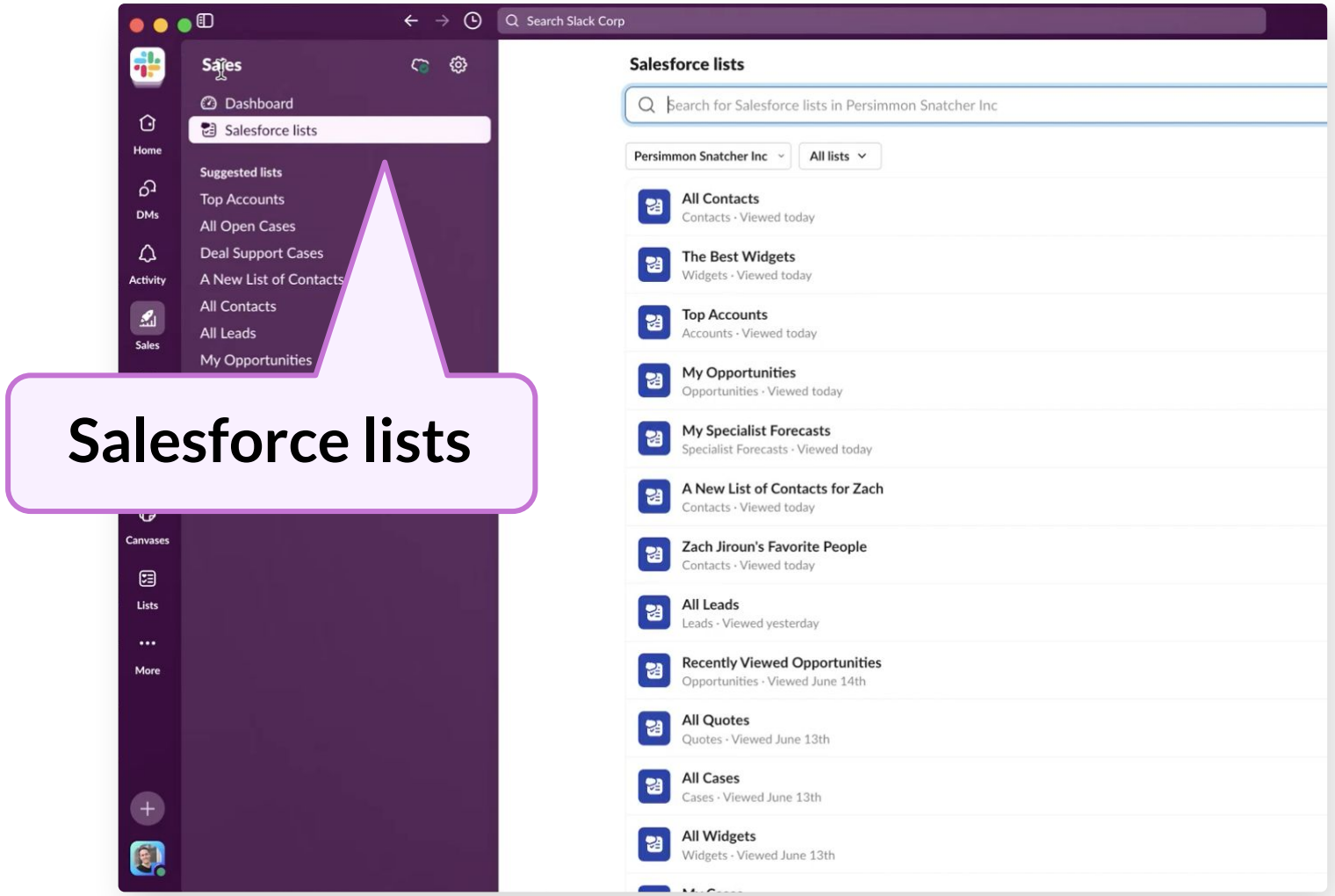
1. Open the **Sales dashboard** in Slack
2. Select **Salesforce lists** in the sidebar
3. Find the record and click the **Create Salesforce Channel** icon next to its name
4. If the record has a parent channel: click **Cancel** to use the parent channel, or **Continue** to create a new one
5. Select **Create a new channel** or **Convert an existing channel**



https://slack.com/help/articles/32664824986259

Create a Salesforce channel

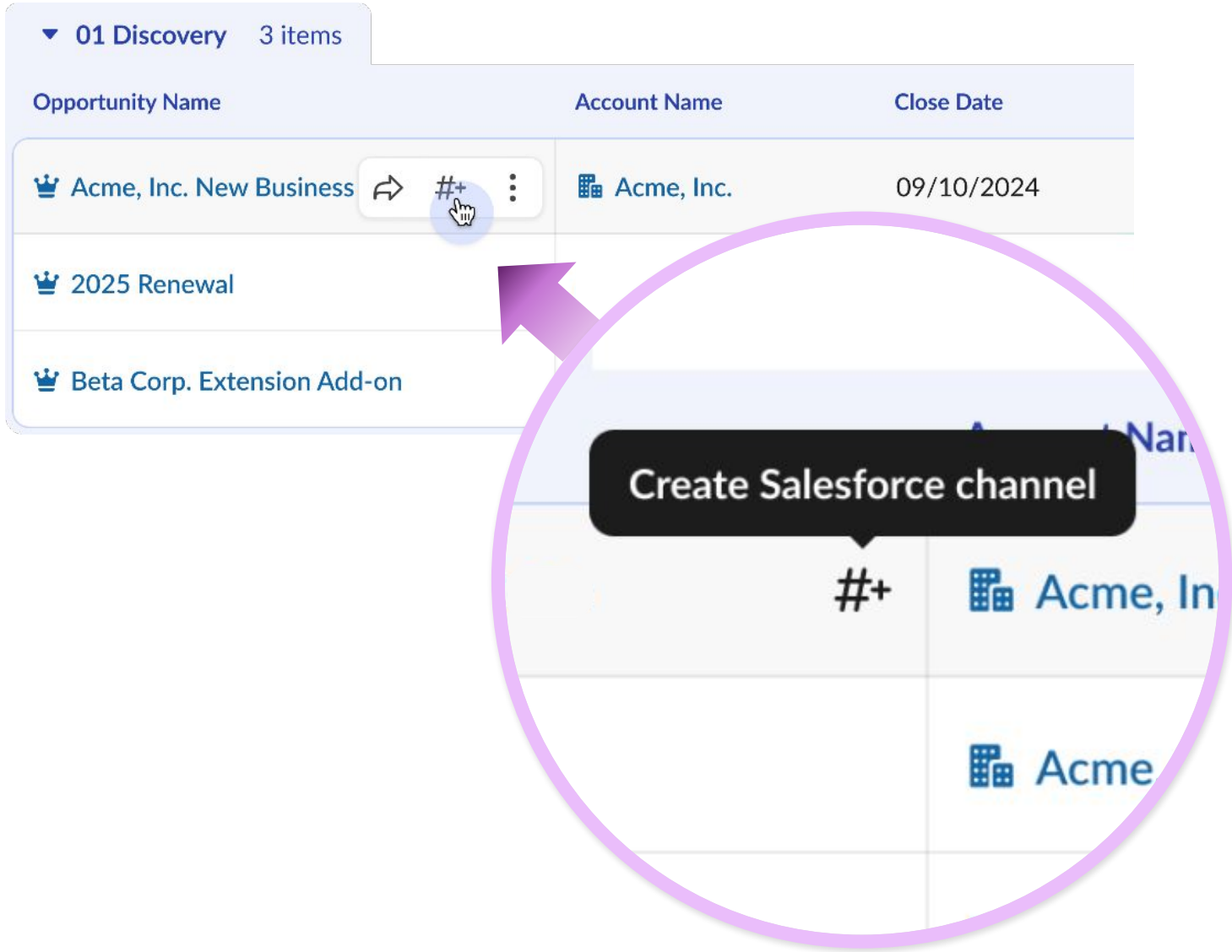
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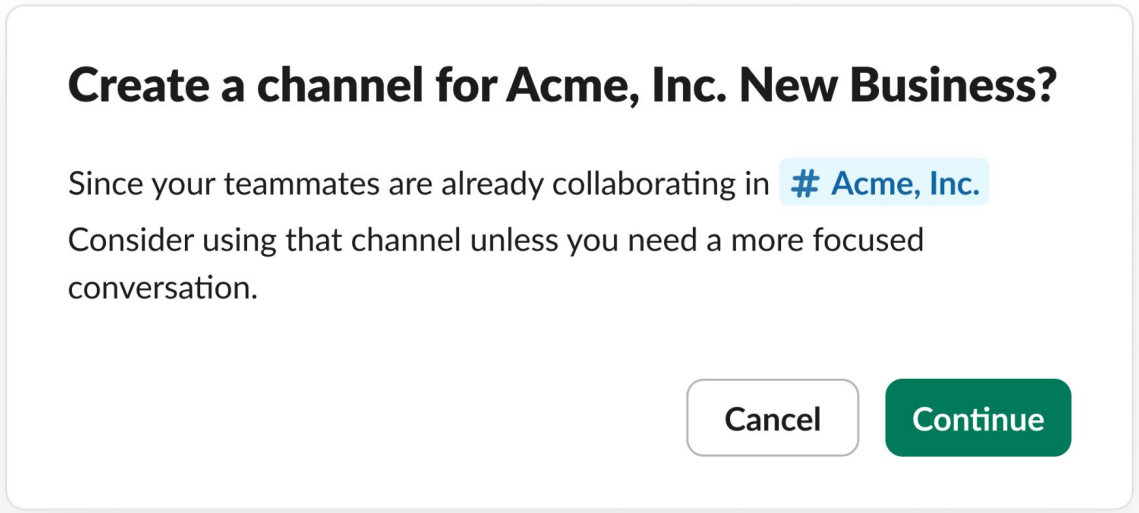


Create a Salesforce channel

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slack from Salesforce

If the record has a parent channel:

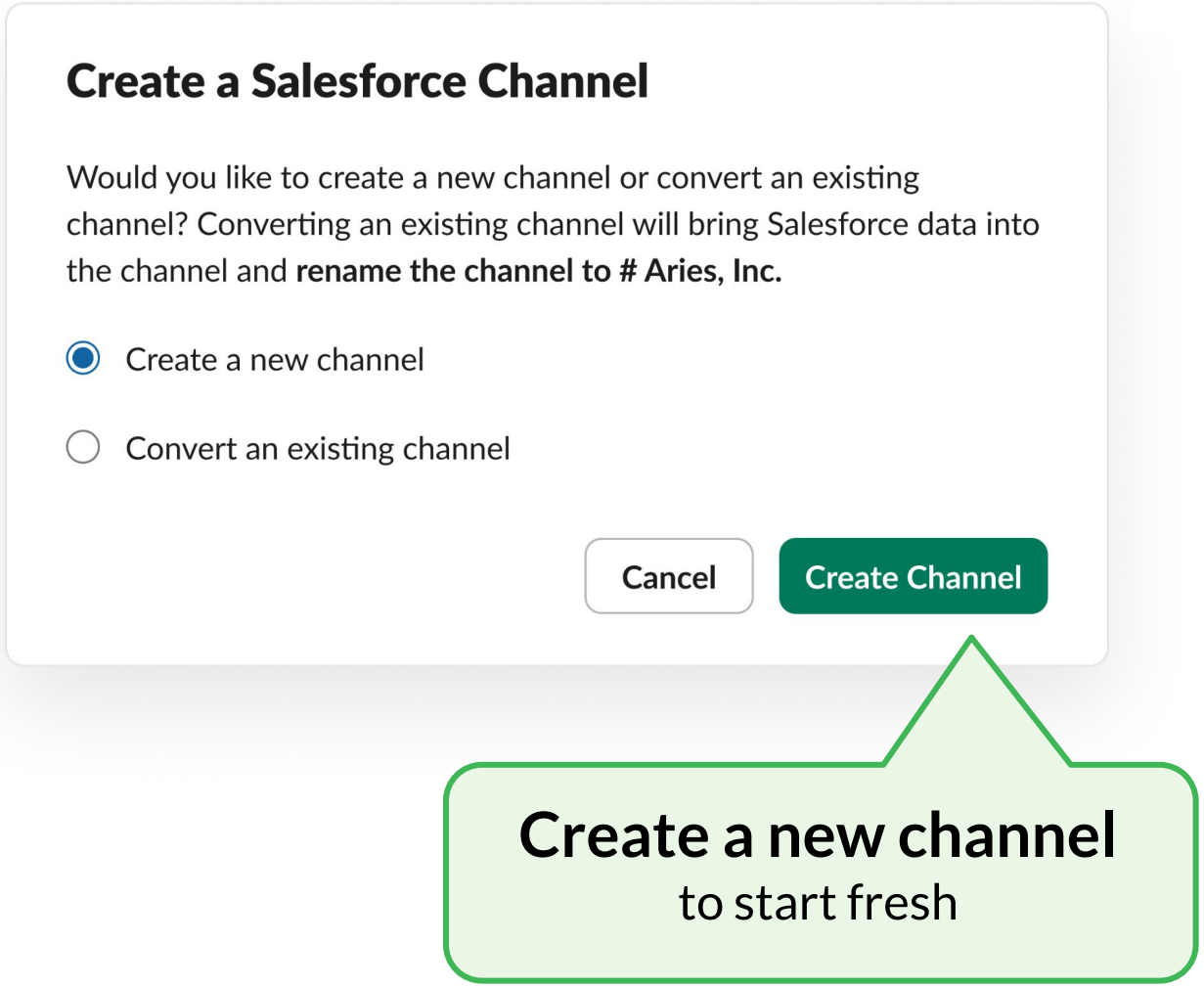


Cancel to use the parent channel

Continue to create a new channel

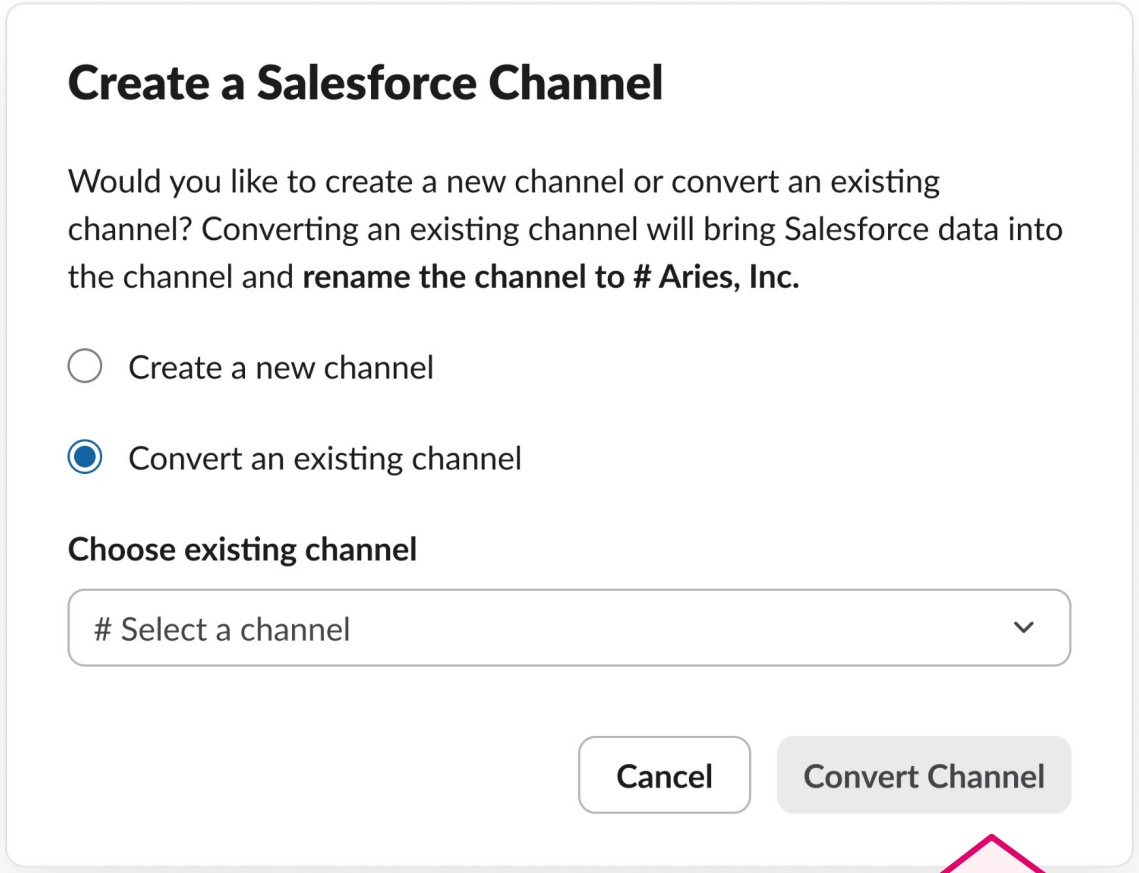
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Create a Salesforce channel

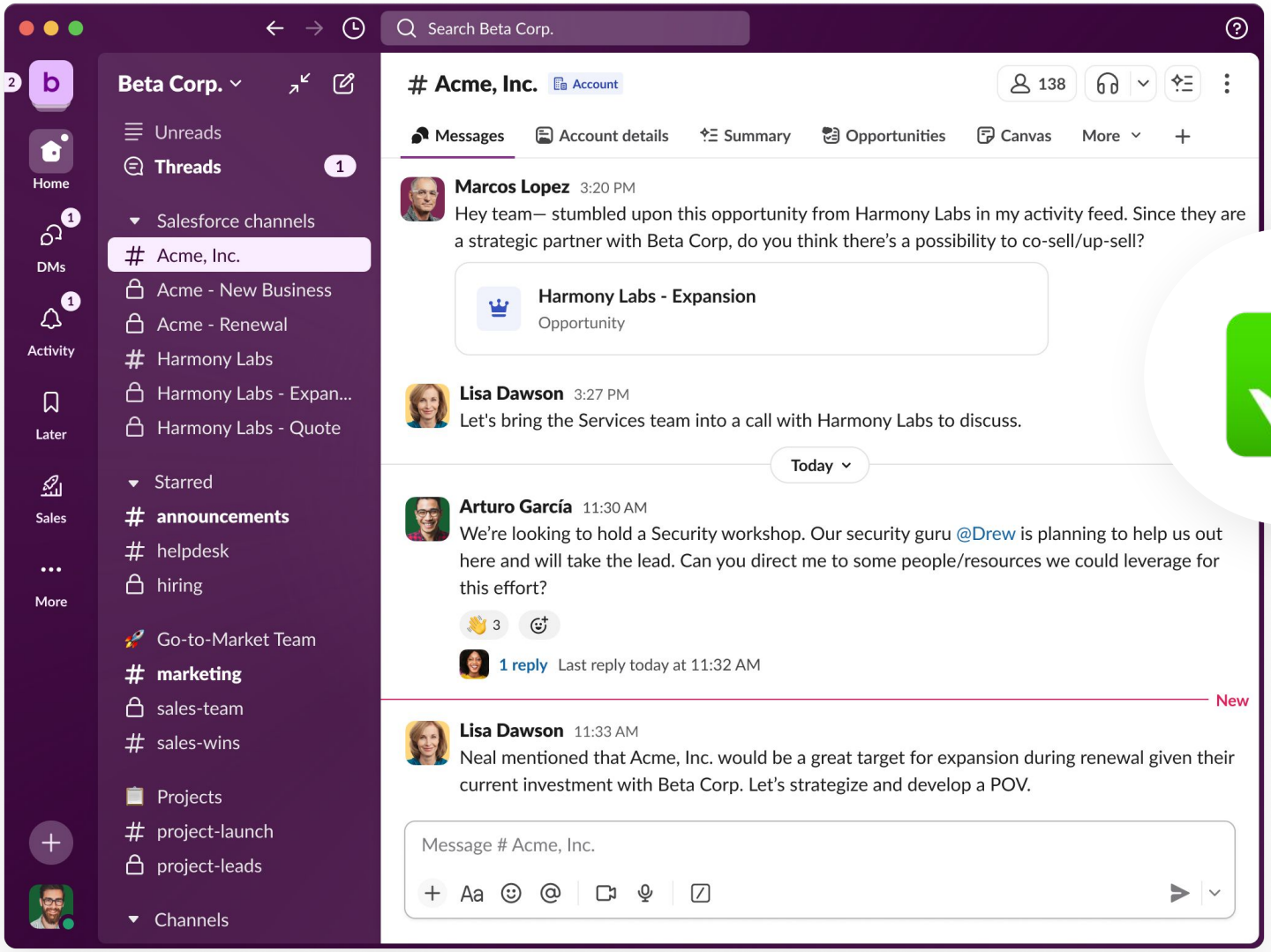
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Convert an existing channel
to include historical context

Salesforce channel created!

slack from Salesforce



Salesforce channel interface

Account level

slack from Salesforce

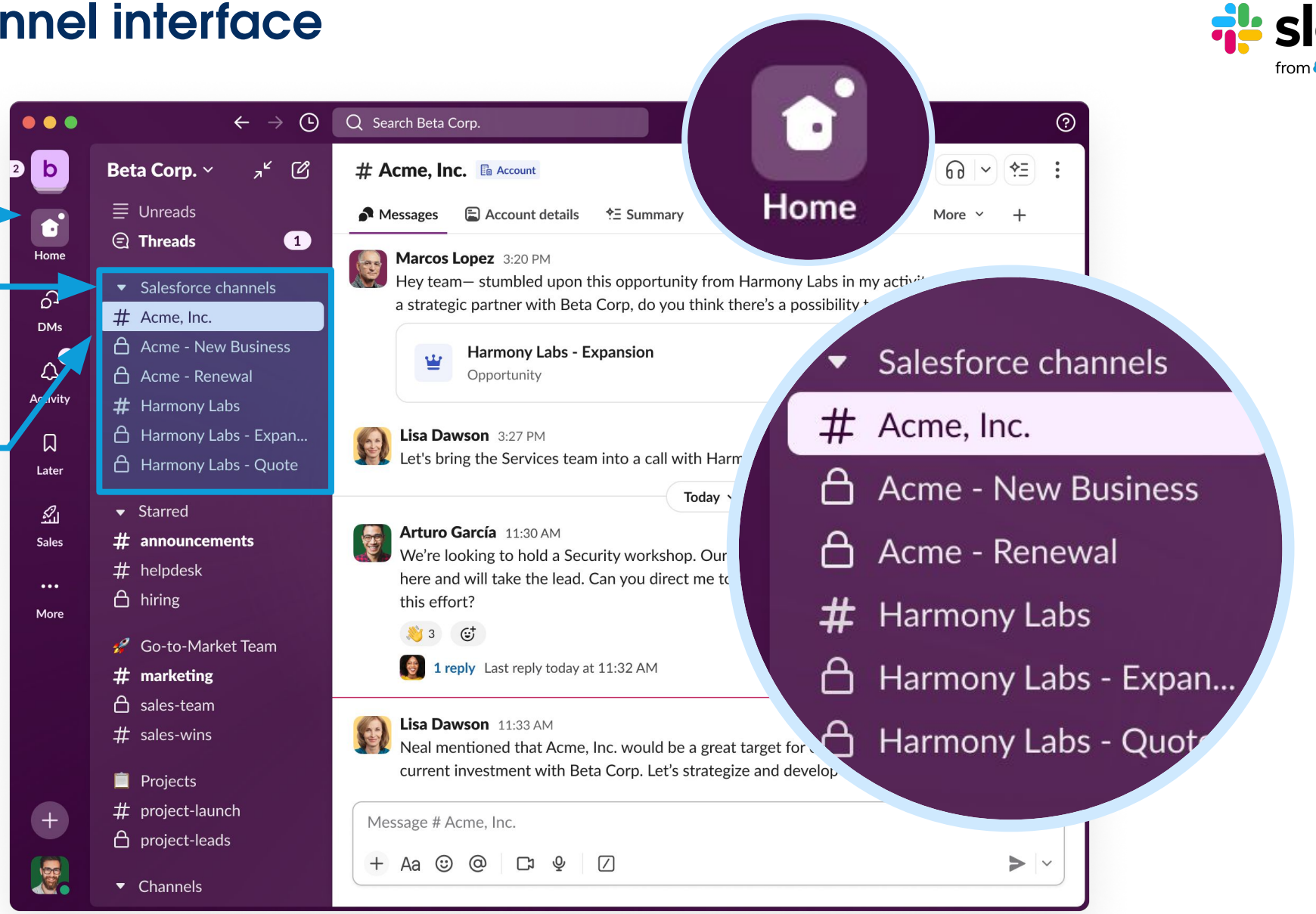
Home

Channel section

Dedicated section for your Salesforce channels

Channel name

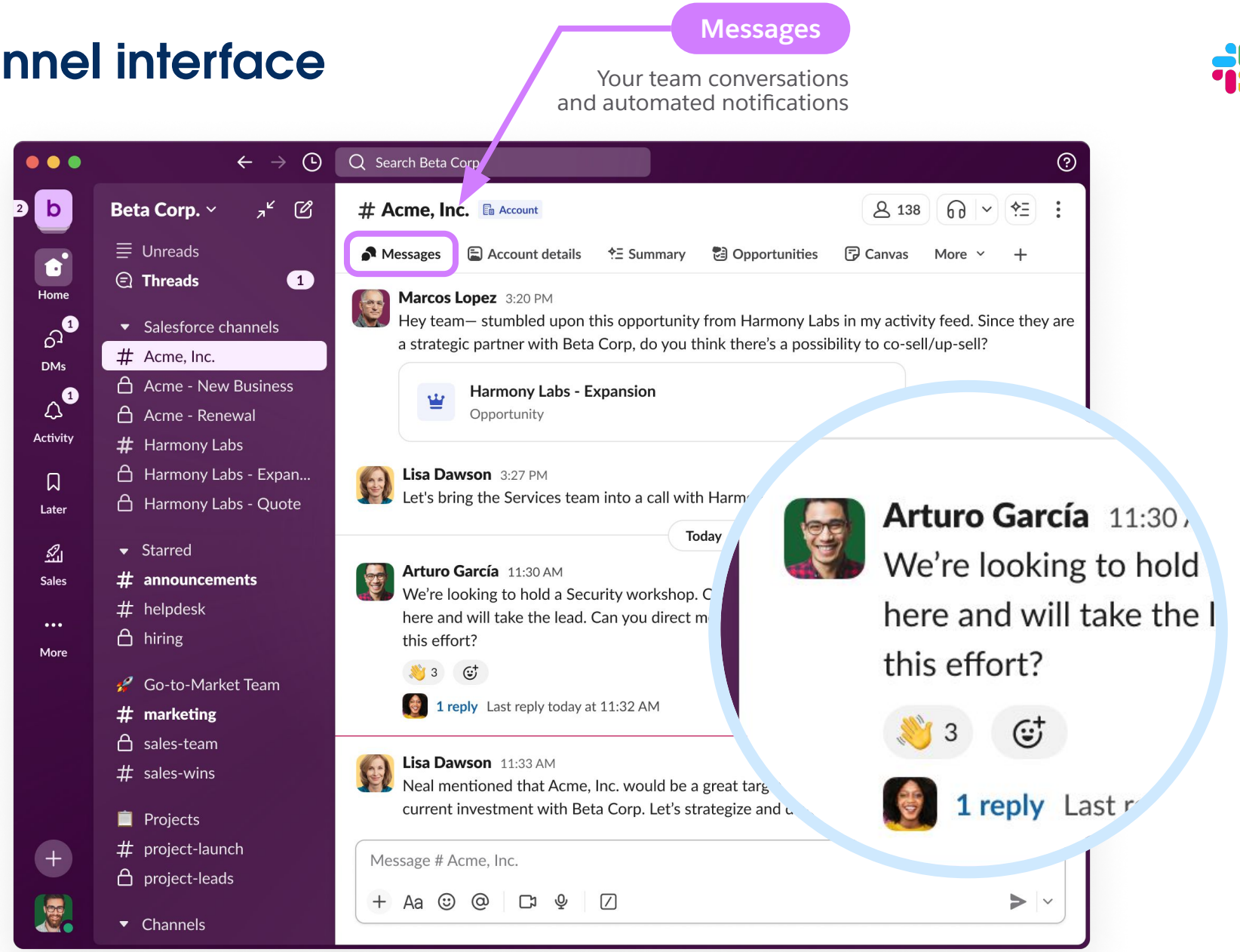
Same name as account name in Salesforce



Salesforce channel interface

Account level

slack from Salesforce

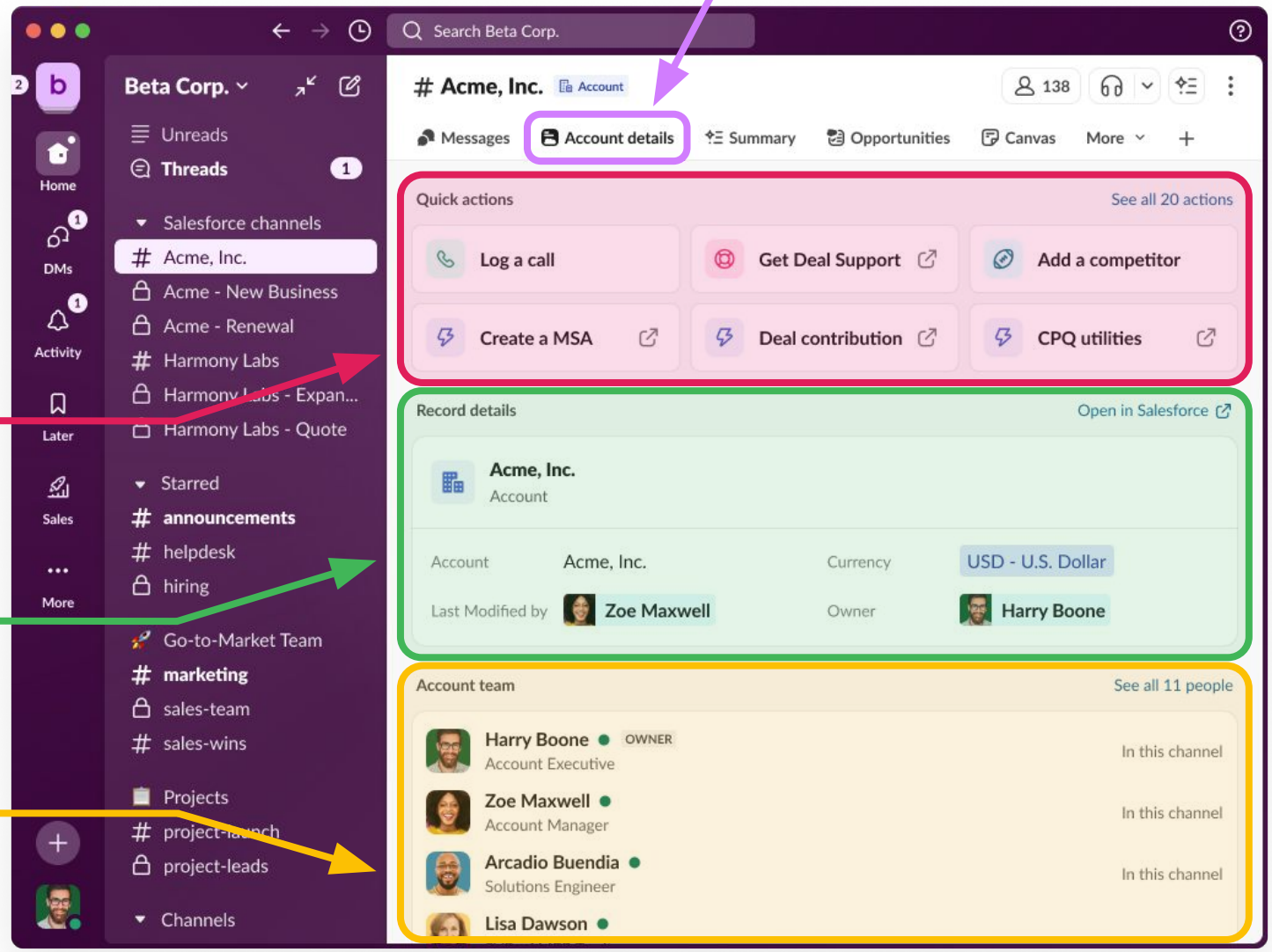


Salesforce channel interface

Account level

Account details

(Object) details tab based off your Slack page layout in Salesforce



Quick actions

Linked to Salesforce and sourced from mobile and lighting actions

Record details

Assigned CRUD Slack record or page layout

Account team

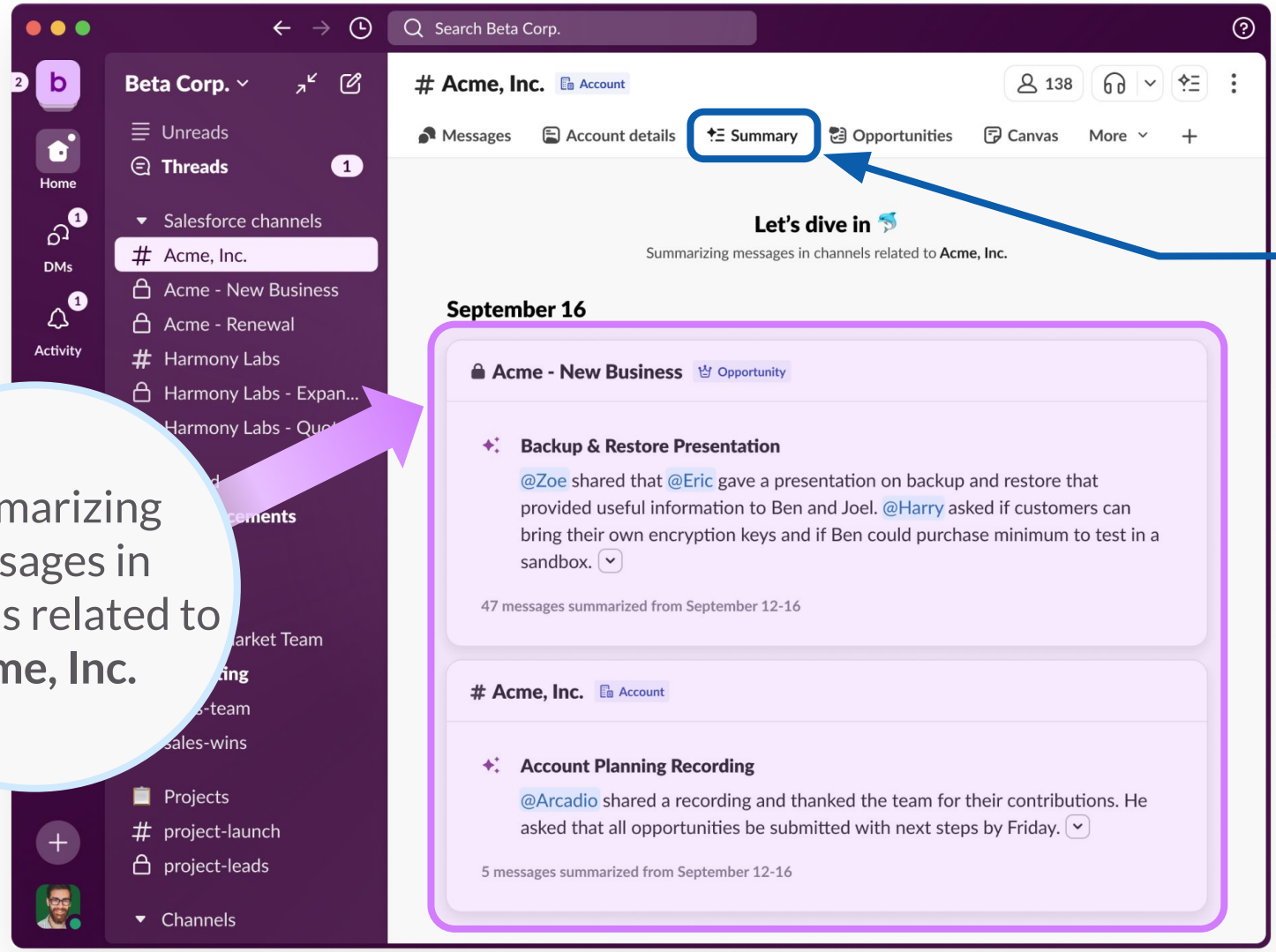
Only appears if there is an account team in Salesforce

How to configure Slack layouts:
https://help.salesforce.com/s/articleView?id=sf.slack_apps_digital_hq_record_layout.htm

Salesforce channel interface

Account level

slack from Salesforce



Summarizing messages in channels related to **Acme, Inc.**

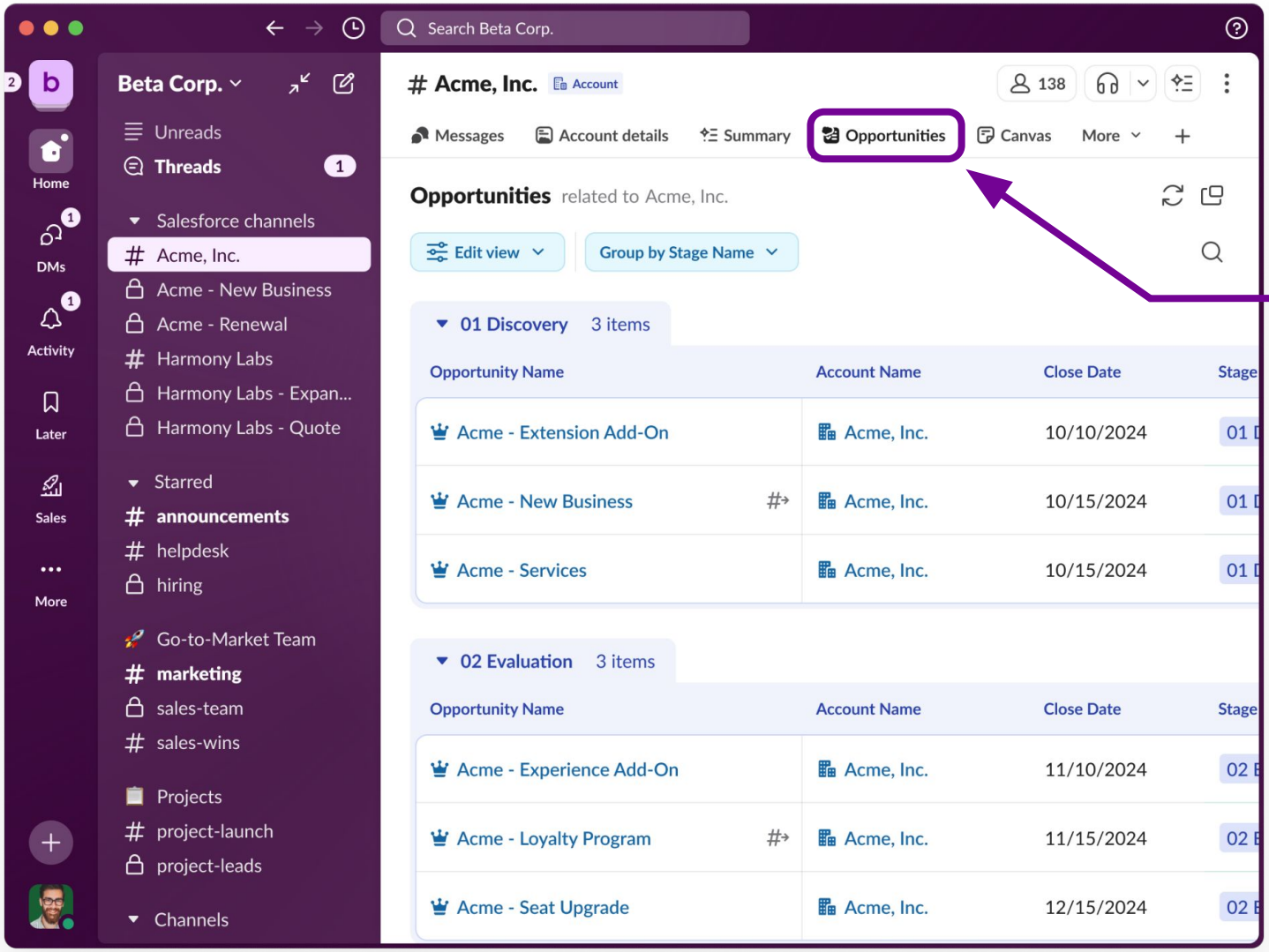
Slack AI Summary

Daily AI summary of the Salesforce channel content and related Salesforce channels
(requires a license)

Salesforce channel interface

Account level

slack from Salesforce



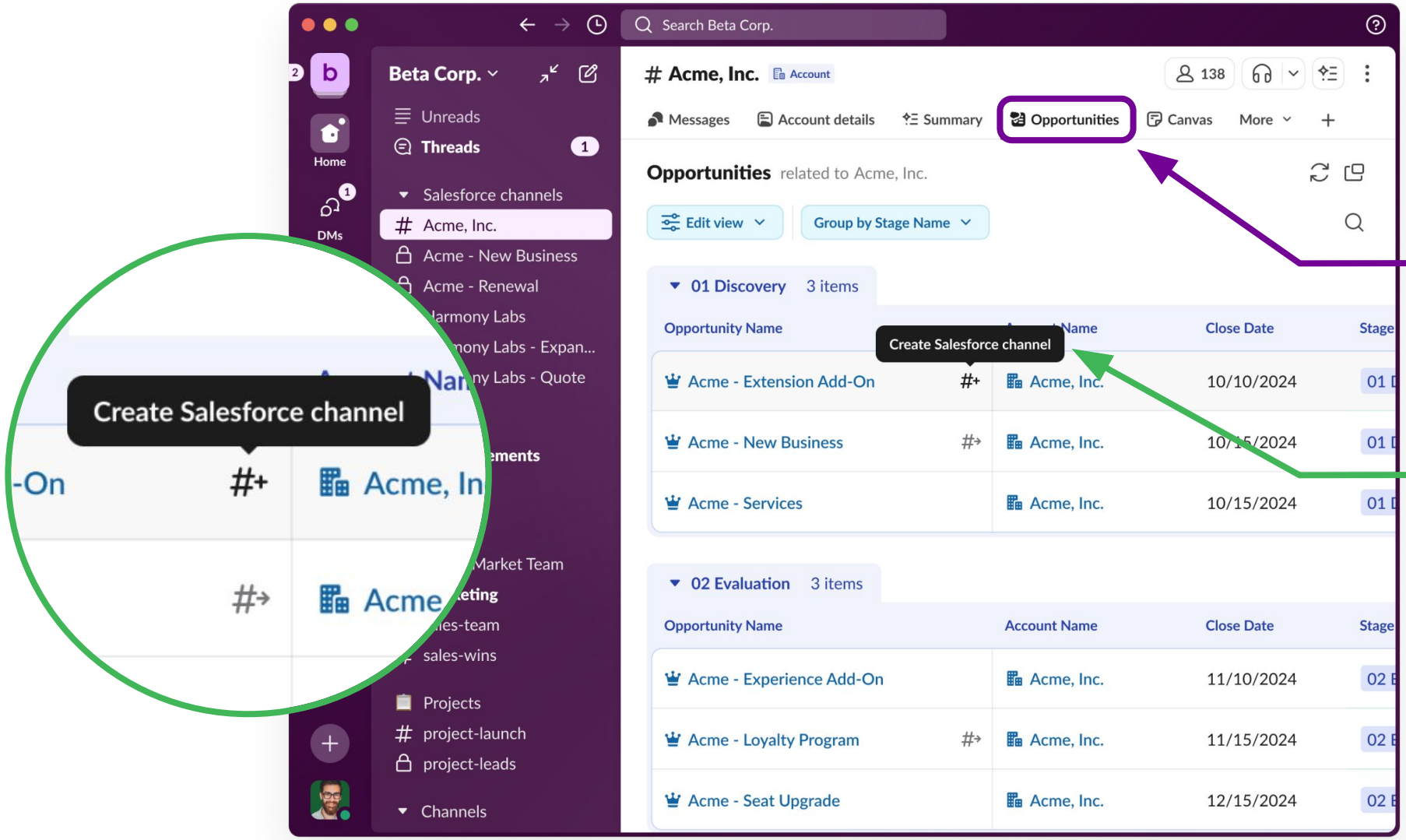
Default list tab

Salesforce list selected at the initial configuration step, editable in Slack & instantly updated in Sales Cloud

Salesforce channel interface

Account level

slack from Salesforce



Default list tab

Salesforce list selected at the initial configuration step, editable in Slack & instantly updated in Sales Cloud

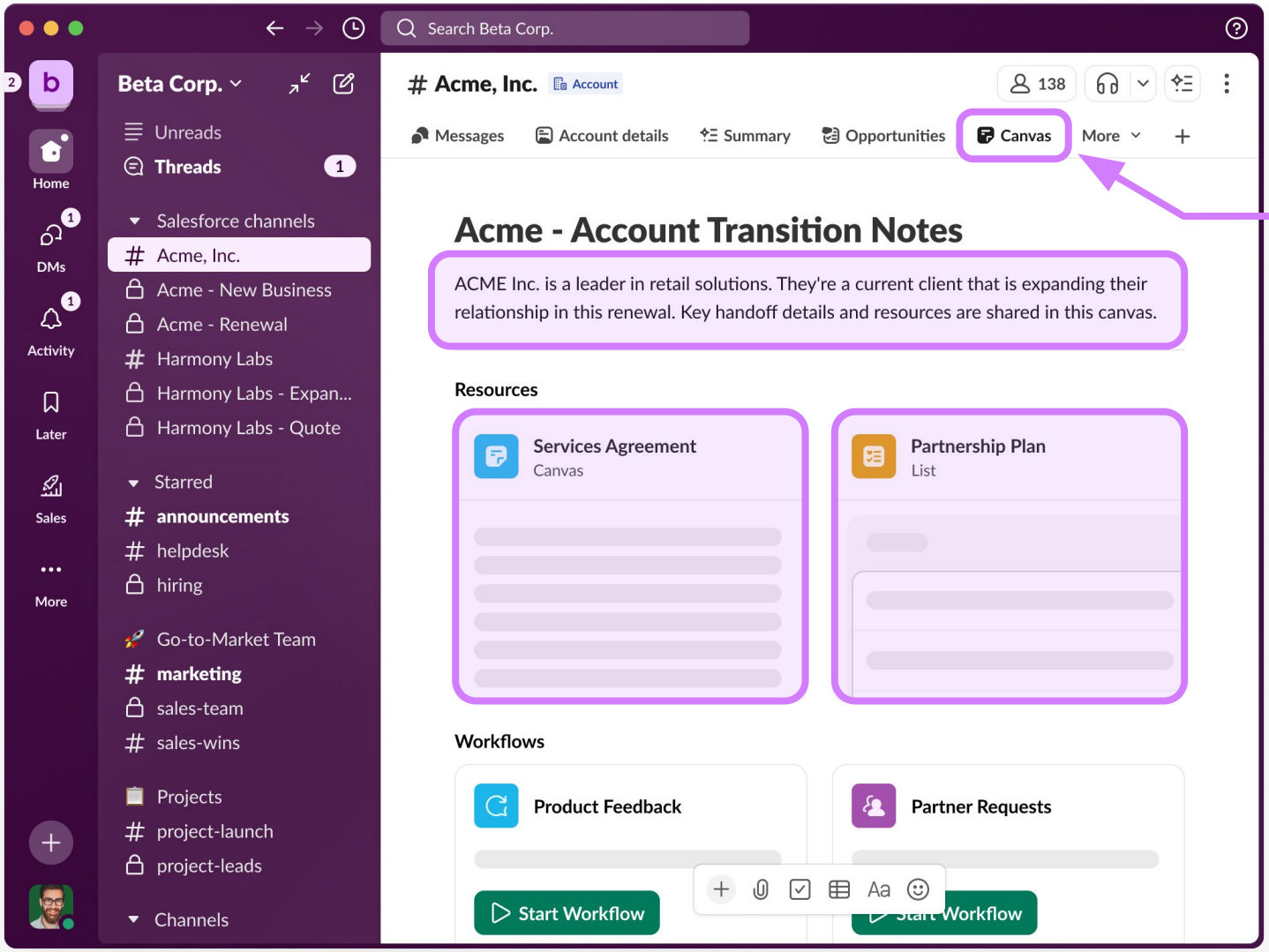
Create channel

Create a Salesforce channel by clicking the # hashtag icon next to any opportunity name

Salesforce channel interface

Account level

slack from Salesforce



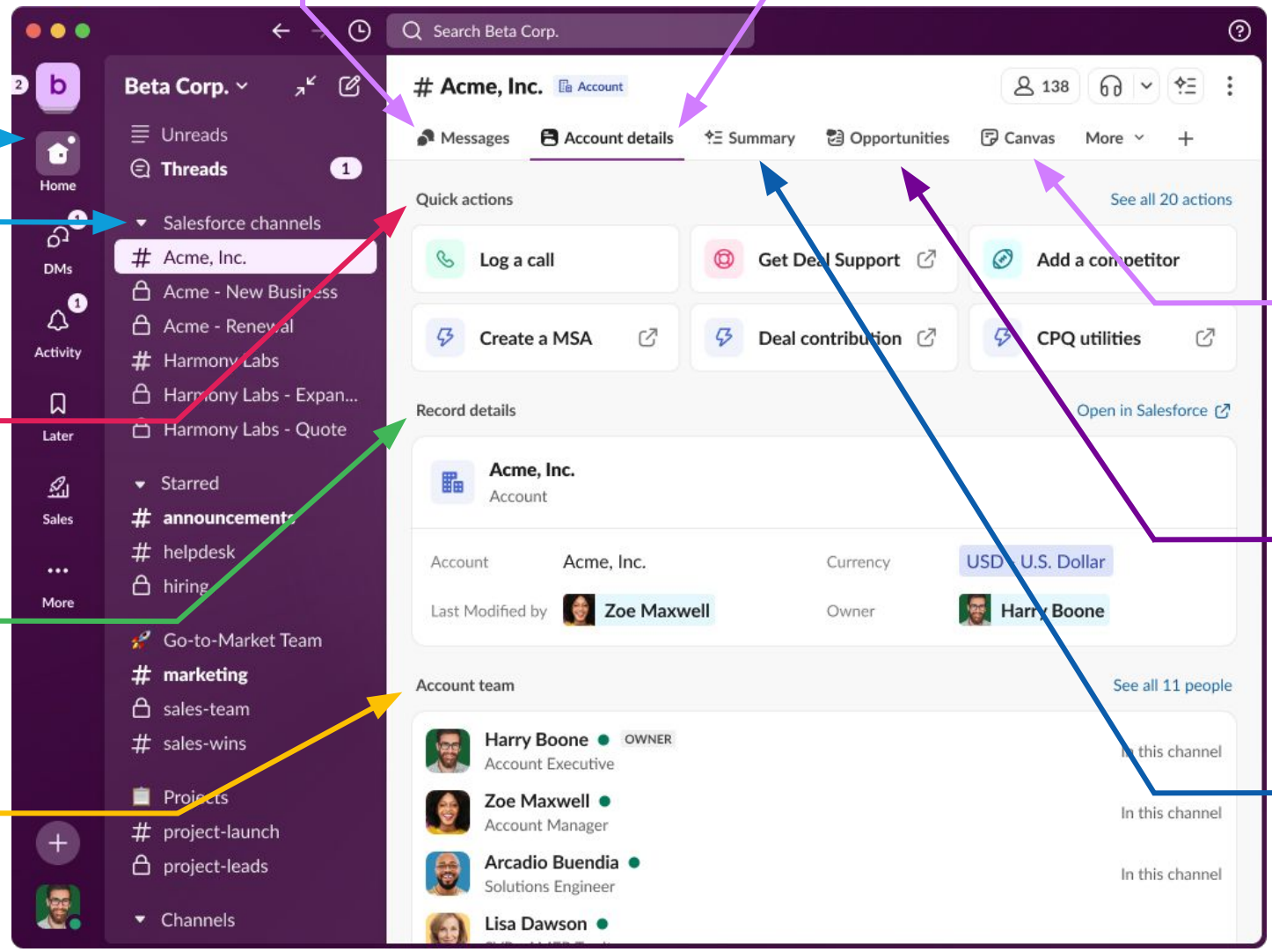
Channel canvas

Document attached to the channel for storing key information, including account notes, important links, and resources

UI walkthrough

Salesforce channel
Account level

slack from Salesforce



Messages

Account details

Home

Channel section

Quick actions

Record details

Account team

Channel canvas

Default list

Slack AI Summary

Requires a license

UI walkthrough

Salesforce channel
Account level

slack from Salesforce

Messages

Your team conversations and automated notifications

Account details

(Object) details tab based off your Slack page layout in Salesforce

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Channel section

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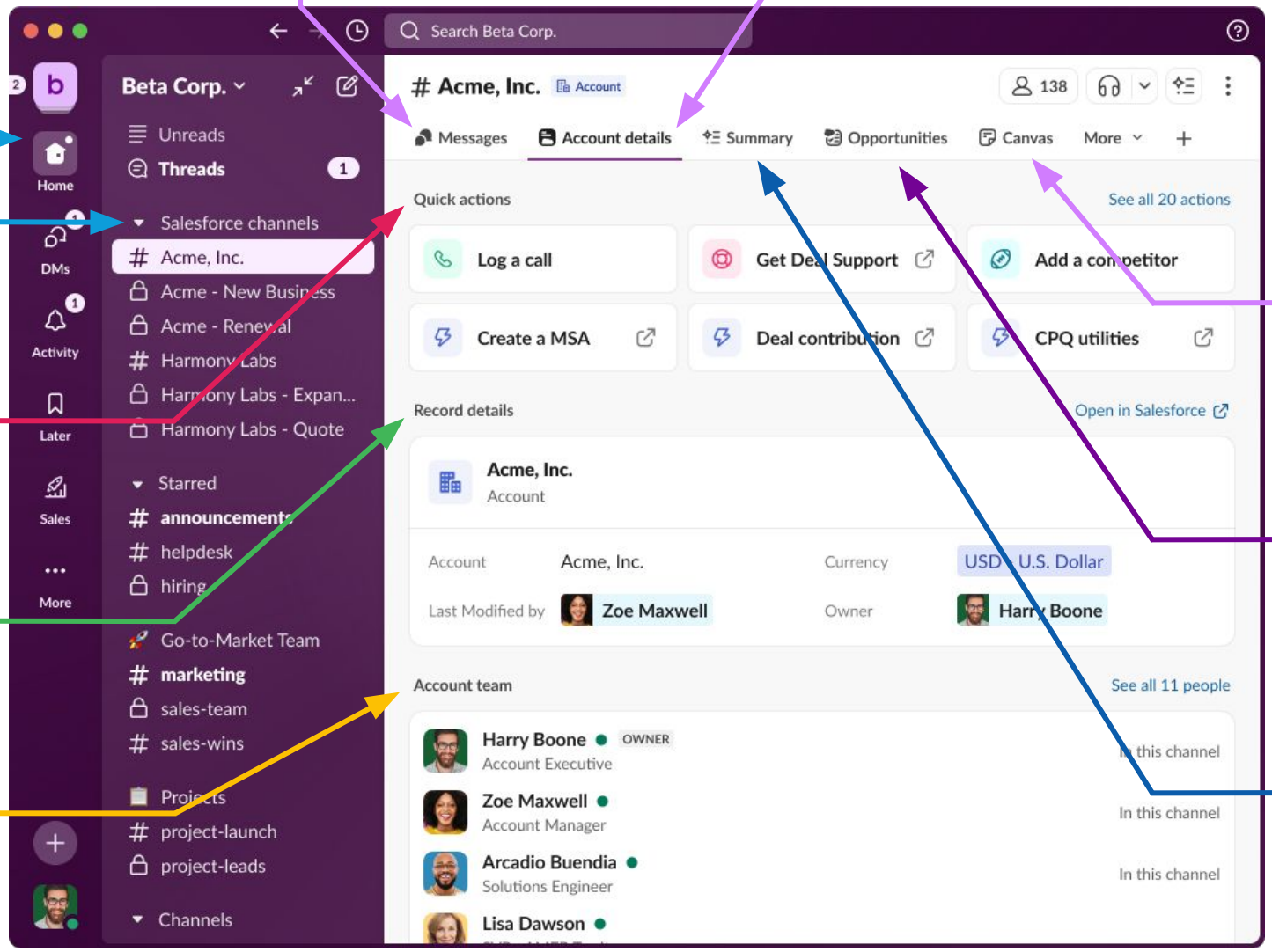
Linked to Salesforce and sourced from mobile and lighting actions

Record details

Assigned CRUD Slack record or page layout

Account team

Only appears if there is an account team in Salesforce



Channel canvas

Document for storing key information, including account notes, important links, and resources

Default list

Salesforce list selected at the initial configuration step, editable in Slack & instantly updated in Sales Cloud

Slack AI Summary

Daily AI summary of the Salesforce channel content (requires a license)

slack
from Salesforce

3

Use cases overview

ACCOUNT CHANNELS

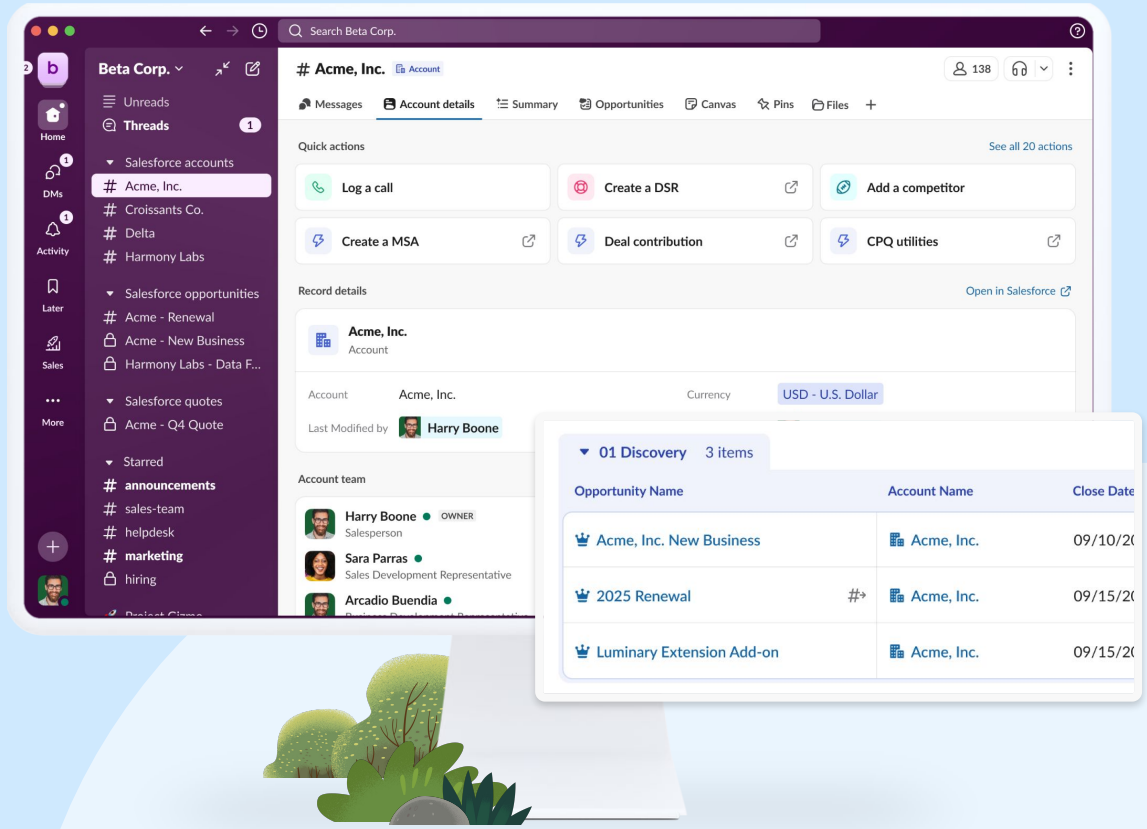
Account Channels

slack from Salesforce

Centralize and scale account team strategy

Account channels are the official, centralized place for:

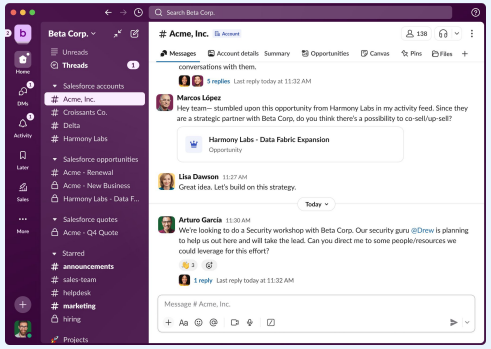
- Account team coordination
- Wins and learnings
- Industry trends
- Customer feedback
- Visibility across related conversations
- And more!



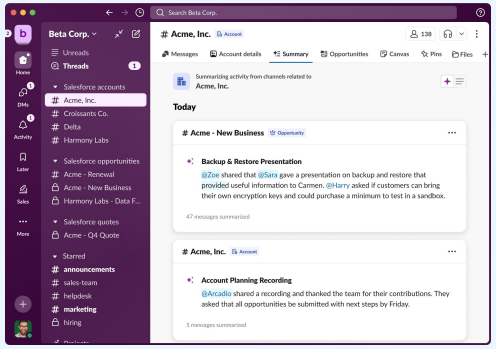
Account Channels

slack from Salesforce

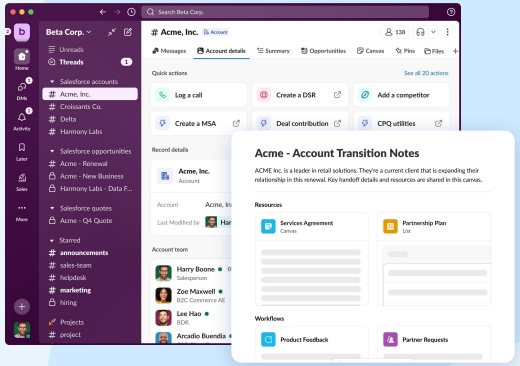
Centralize and scale account team strategy



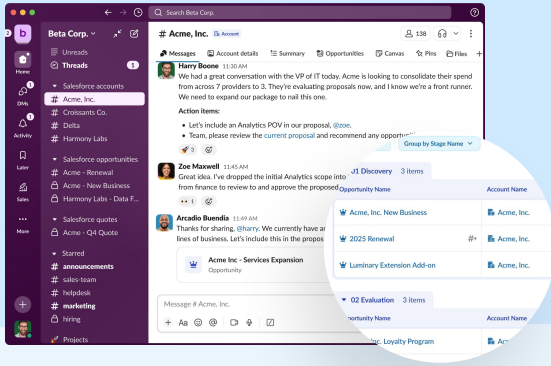
Centralize account collaboration



Stay up to date on account activity



Streamline account transitions



Drive cross-sell and upsell

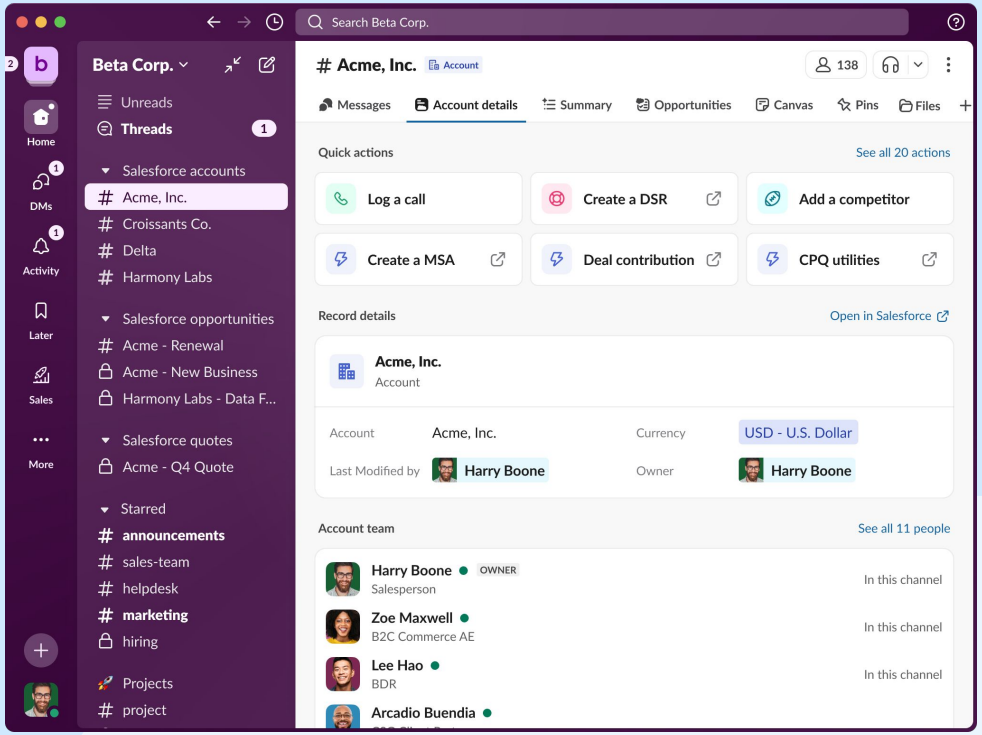
Account Channels

Accelerate rep onboarding and transitions

slack from Salesforce

Account channels:

- Centralize all customer insights across CRM, files, and discussions
- Log historical conversations and decisions
- Summarize all related conversations quickly



slack
from Salesforce

3

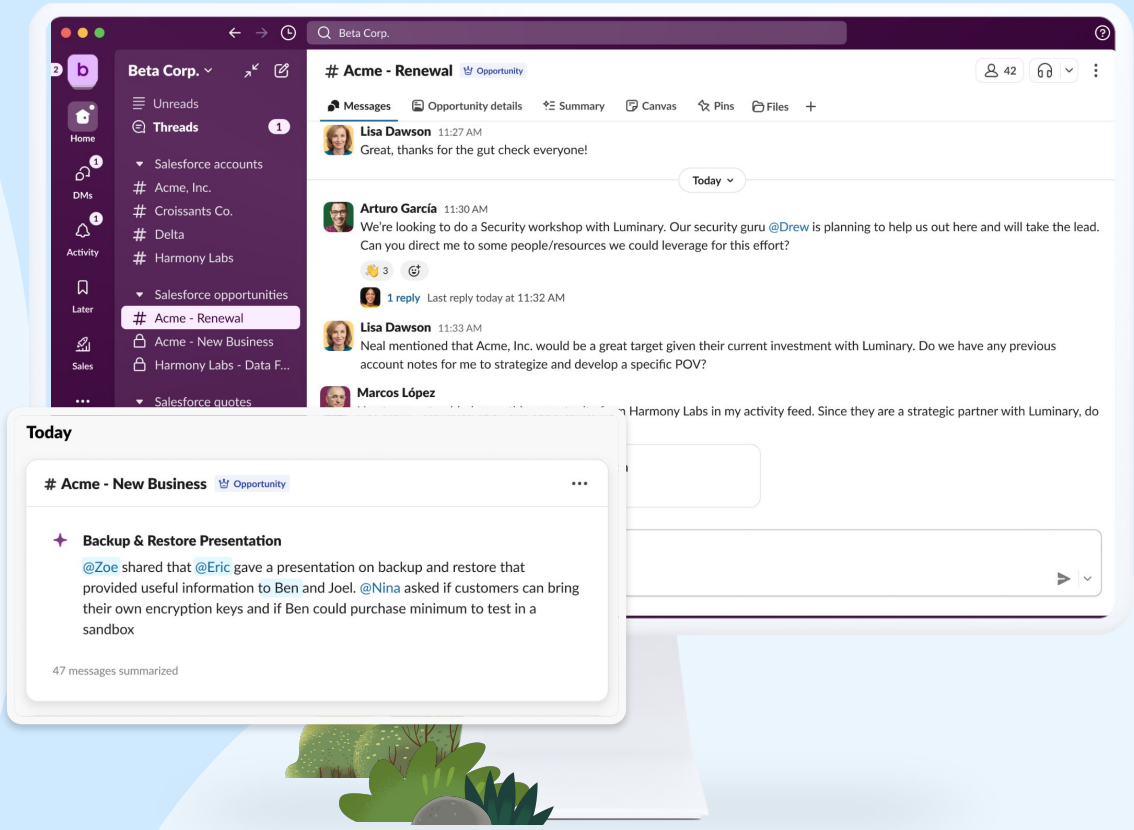
Use cases overview

OPPORTUNITY CHANNELS

Opportunity Channels

slack from Salesforce

Progress deals with your selling team in deal rooms



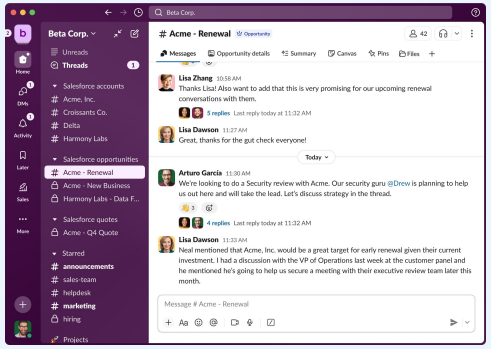
Opportunity channels are the official, centric place for:

- Strategy discussions
- Meeting prep
- Presentation strategy
- Competitive insights
- Swarm on deal negotiations
- And more!

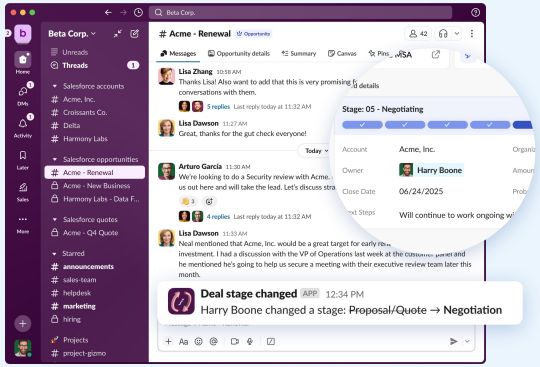
Opportunity Channels

Progress deals with your selling team in opportunity channels

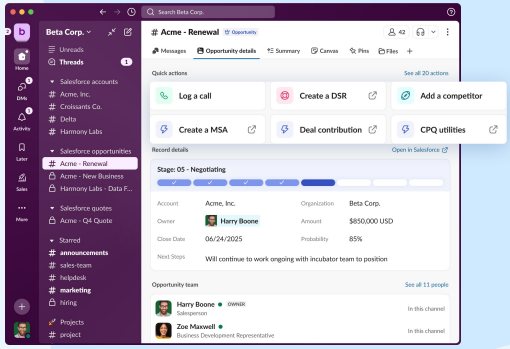
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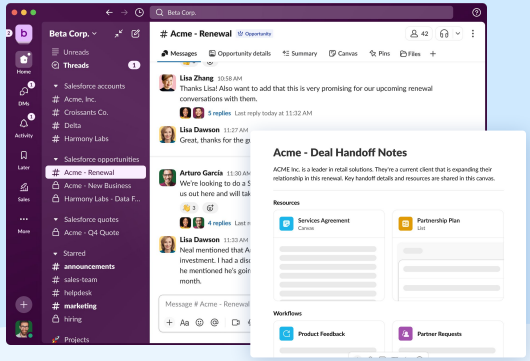
Coordinate complex deals efficiently



Keep the selling team on the same page



Navigate deal negotiations efficiently across functions



Streamline post-sale handoffs

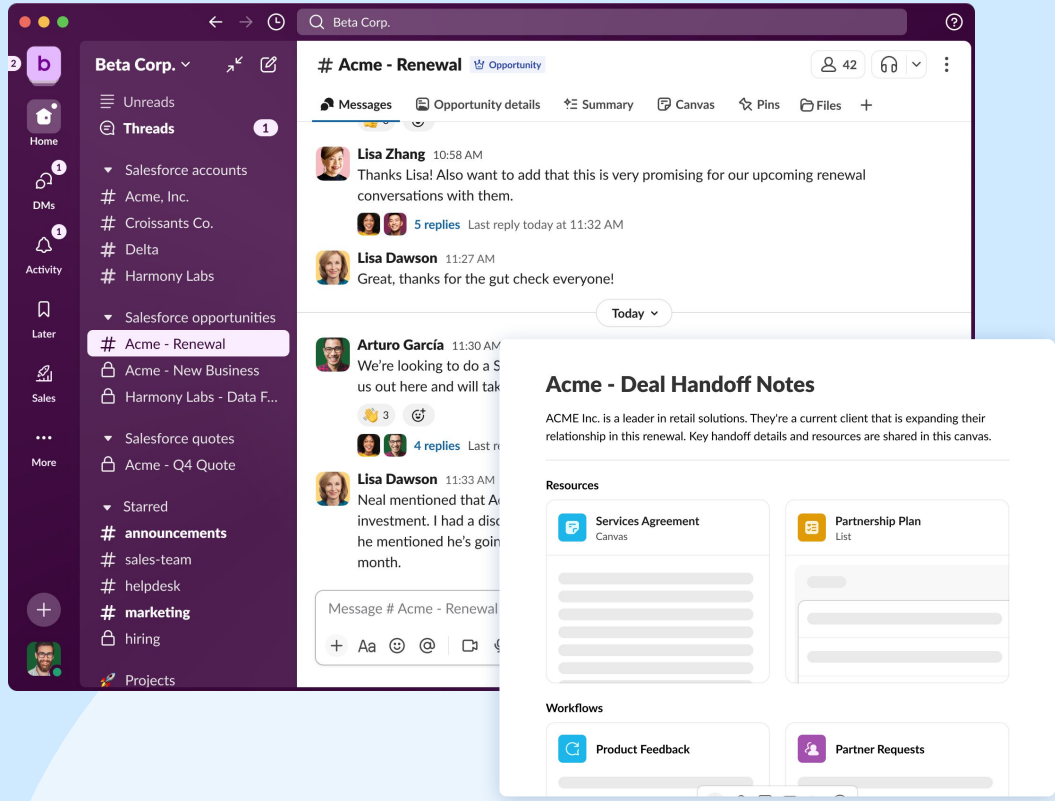
Opportunity Channels

slack from Salesforce

Streamline post-sale handoffs

Opportunity channels:

- Capture historical context
- Centralize important files and handoff notes
- Get post-sale teams up to speed fast with AI



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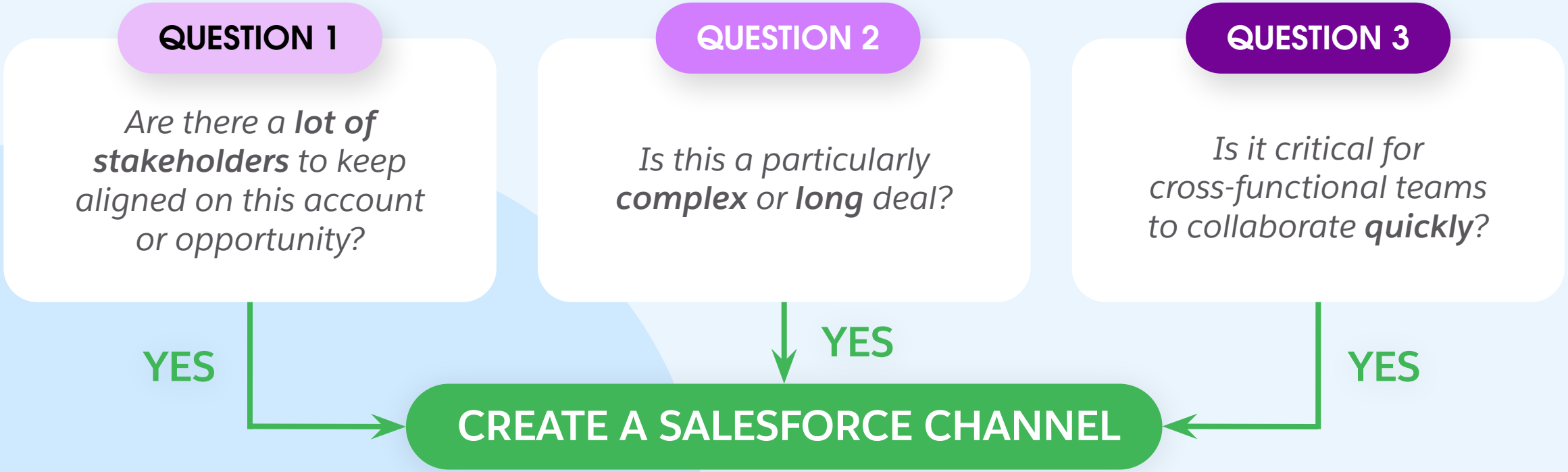
4

Best practices & FAQ

Best practices

When should I create a Salesforce channel?

Ask yourself these questions before creating a Salesforce channel. If you answer **yes** to any of them, it's a strong indicator that a Salesforce channel could be beneficial:



Best practices

When to use an Account Salesforce Channel vs. an Opportunity Salesforce Channel?

Each is designed to support different aspects of your sales process. Knowing when to use each one will help you and your team stay in sync and collaborate more effectively.

ACCOUNT CHANNEL

Ideal for: Top AOV customers & most active prospects

Use cases: This channel provides an overview of the account landscape and facilitates collaboration with the entire team on topics such as:

- Account team coordination
- Industry trends
- Meeting notes and customer feedback
- Celebrating success
- Other non-confidential activity

OPPORTUNITY CHANNEL

Ideal for: Most active and complex opportunities

Use cases: This channel is used to strategically plan and push deals forward within your opportunity team, including activities such as:

- Deal progression
- Demo strategy
- Competitive strategy
- Meeting planning
- Other opportunity-related activity

FAQs

slack from Salesforce

1 Can I, as an end user, choose what appears in my Overview tab? (like Quick Actions and details under Record Details)

- No, end users cannot customize this tab. It is determined by the Page Layout in Salesforce, and only Salesforce admins have the ability to modify its appearance for end users.

2 What's the best way for me to prioritize my Salesforce channels?

- You can easily organize your Salesforce channels by dragging and dropping them into **custom sections**, just like you would with traditional Slack channels.
- Another effective way to prioritize your Salesforce channels is to view your records in **list view** within Slack Sales Elevate, where you can filter and sort by your specific priorities.
- From this list, you can click on each record's corresponding Salesforce channel. If a channel hasn't been created yet or if there's a channel based on the parent record instead, you'll be prompted accordingly.

3 How do I prevent Salesforce channels from getting too noisy?

- You can mute Salesforce channels to minimize notifications, allowing you to engage in conversations when necessary without getting notified for every message.
- If you have Slack AI, you can also add your Salesforce channels to your Summary recap for a streamlined overview of important discussions.

FAQs

slack from Salesforce

4 Can I turn an existing account channel into a Salesforce channel?

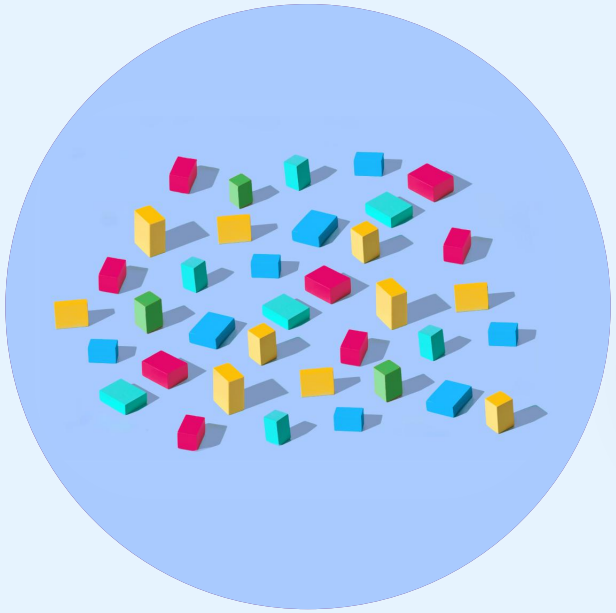
- Not yet, but this feature is coming soon! We're developing an in-product channel conversion tool for migrating existing channels into Salesforce channels.
- From the existing channel, you'll be able to select the Salesforce record to convert it to. This will supercharge your existing account channels with customer data!

5 As Salesforce tracks highly sensitive information, who can access a Salesforce channel?

- Access to record data within a Salesforce channel mirrors your Salesforce permissions.
- If a user has Slack Sales Elevate and can view or edit the record in Salesforce, they can do the same in the Salesforce channel.
- Channel members without Salesforce access can still participate in the conversation in the Salesforce channel, but they will only be able to see the Messages, Files, and Canvas tabs – keeping Salesforce sensitive data secure.

Your next steps

slack from Salesforce



1. **Download this presentation at:**
   slack.com/salesforce-channels-101-deck

2. **Explore Salesforce channel use cases**
   slack.com/salesforce-channels-use-cases

3. **Any questions? Log a ticket at:**
   slack.com/help

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Thank you 