Slack Integration

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Overview

Slack is a great way to keep in touch as you do business. Streamline your company's communication by using SalesPad Cloud's Workflow rules to automatically send Slack messages as sales documents proceed through their Workflows.

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Connect to Slack

To connect your SalesPad Cloud account to your Slack account, you need to log in to Slack as an administrator.

Once you've logged in to Slack, navigate to **Apps and Integrations**.

The App Directory will open in your web browser. Search for the Incoming WebHooks app and add the app to your Slack account.

Choose an existing channel or user, or create a new channel to send messages to using Slack within SalesPad Cloud.

Click the **Add Incoming WebHooks Integration** when you're finished. Copy the WebHook URL in the window that pops up, then navigate to SalesPad Cloud and open the Workflow module.

Select the Rules tab, add a new rule, choose Always as the condition criteria, then add an action to that rule. Choose the Slack action type.

Paste the WebHook URL into the Web Hook URL field that appears.

Click **Save** to save your rule.

Note: To send Slack messages to different channels or users for different Workflow rules, simply create a new WebHook URL for that channel and paste that URL into your rule.

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See it in Action

When a sales document encounters your new Slack Workflow rule, the Slack channel or user you specified will receive an automated message. The message shows that the sales document moved, and it displays both the document number and the batch that the document moved to.

Click the SalesPad Cloud link to open SalesPad Cloud, or click the sales document link to go straight to the document in SalesPad Cloud.

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