

# Slack to Feed connector

## Setup guide

1. **Choose Slack account(s) for sync.** This has to be your account or an account of your team member. If you have someone with access to all the Slack channels you want to sync with Creatio, this is the best team member to use his account for sync. If you don't have such a team member, you will need to repeat this setup for multiple Slack accounts, so that all together these accounts cover all the channels you want to be synced.
2. **Add Slack API token to Creatio.**
  - Login to the Slack account you are about to sync.
  - Go to: <https://api.slack.com/custom-integrations/legacy-tokens> and create a token for your account.

The screenshot shows the Slack API Legacy Tokens page. The left sidebar contains a navigation menu with 'Legacy tokens' highlighted. The main content area features a warning about legacy integrations, a 'Legacy token generator' section with a warning about token safety, and a table for generating tokens. The table has columns for Team, User, and Token. The first row shows 'R&D' for Team and 'a.orlov' for User. There is an input field for the Token and a 'Re-issue token' button.

- Login to your Creatio and go to: System designer > Lookups. Search for and open a 'Slack Settings' lookup.
  - Add new record to 'Slack Settings':
    - Name: provide any name, ie. 'John Best's Slack channels'
    - Token: <copy token from your slack account and paste it here>
    - Enabled: Yes.
3. **Grant access rights for integration setup.**
    - Go to System designer > Operation permissions. Search for and open the operation with a code 'CanExecuteLinkToSlackAction'.

- In 'Operation permission' add users or roles you want to grant access to setup integration.

#### **4. Sync Creatio record with a Slack channel.**

- Select the record in the system for which you would like to populate the feed with conversations from a Slack channel. For example, if you have different Slack channels for each opportunity managed by your sales team, you need to pick that opportunity in 'Opportunities' section.
- Go to Actions > Link to Slack channel. From the list of Slack channels choose the one that should be synced with the record you've selected.
- Repeat these steps for each record you need to sync.

#### **5. Setup synchronization period:**

- By default, sync period is set to 30 minutes. Consider if that works well for you or you would like synchronization to run more often.
- Go to System designer > System settings. Search for and open system setting with code 'SlackSyncPeriod'.
- Set the time period (in minutes) for sync as 'Default value'.