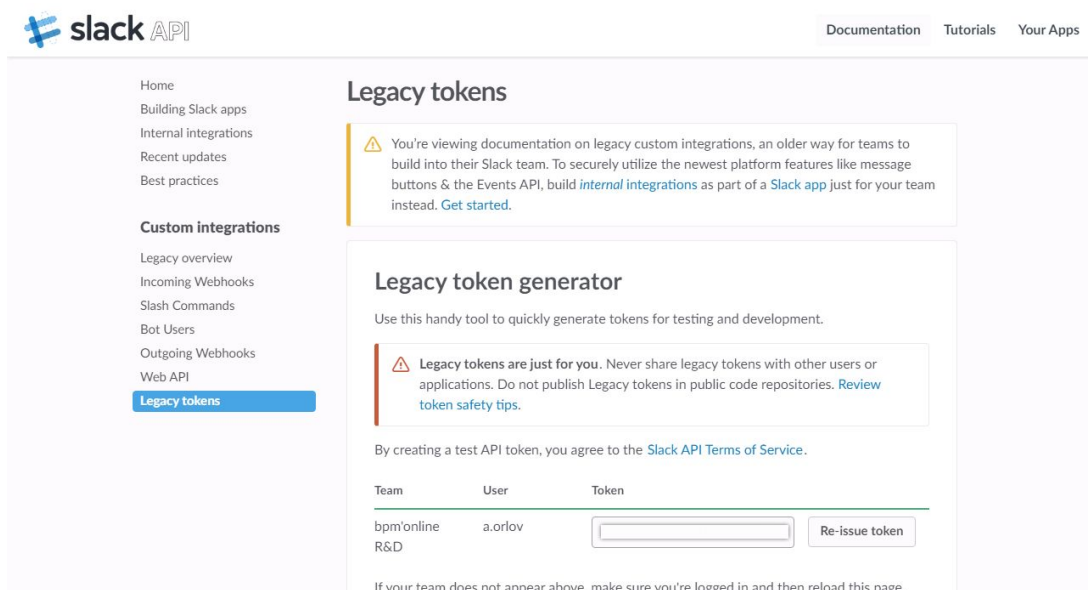


Slack to Feed connector

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 bpm'online, 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 bpm'online.**
 - 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 page title is "slack API" with "slack" in blue and "API" in grey. In the top right corner, there are links for "Documentation", "Tutorials", and "Your Apps". On the left side, there is a navigation menu with "Legacy tokens" highlighted in blue. The main content area is titled "Legacy tokens" and contains a warning message: "You're viewing documentation on legacy custom integrations, an older way for teams to build into their Slack team. To securely utilize the newest platform features like message buttons & the Events API, build internal integrations as part of a Slack app just for your team instead. Get started." Below this is the "Legacy token generator" section, which includes a warning: "Legacy tokens are just for you. Never share legacy tokens with other users or applications. Do not publish Legacy tokens in public code repositories. Review token safety tips." A note states: "By creating a test API token, you agree to the Slack API Terms of Service." There is a table with columns "Team", "User", and "Token". The "Team" column contains "bpm'online R&D" and the "User" column contains "a.orlov". The "Token" column has an empty input field and a "Re-issue token" button. At the bottom, it says: "If your team does not appear above, make sure you're logged in and then reload this page."

- Login to your bpm'online and go to: System designer > Lookups. Search for and open a 'Slack Settings' lookup.
 - Add new record to 'Slack Settings':
 - Name: provide any name, i.e. '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 bpm'online 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'.