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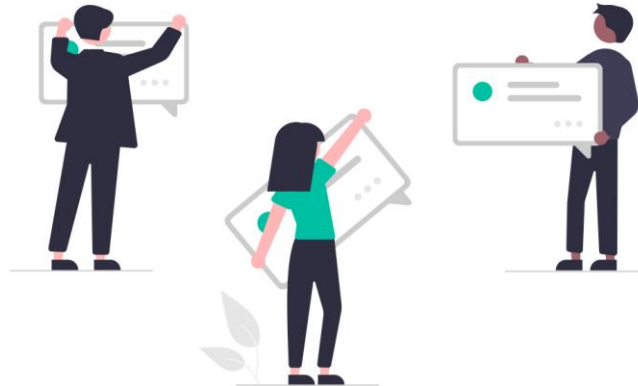
Demo

Summary

LDC OFFICE HOURS TAKEOVER!

Slack Training Series

Automating with Workflow in Slack



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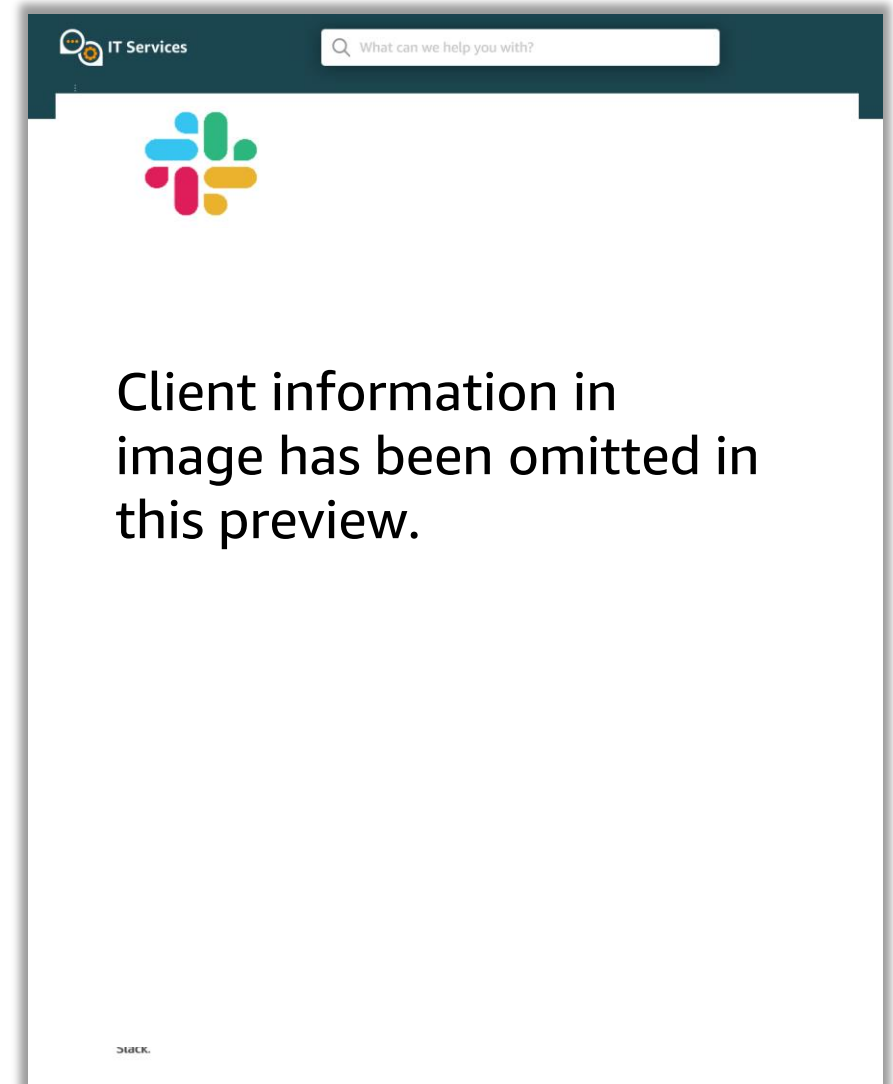
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Slack Support: [IT Website](#)

Workspace: XXXXXX



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Summary

Workflow Builder provides a no-code solution to automate routine processes, using predefined triggers and steps.

The screenshot displays the Slack Workflow Builder interface. At the top, it shows the 'Workflow Builder' header for the 'Marketing in the Slack Corp Organization' workspace, with 'Import' and 'Create' buttons. Below this, there are tabs for 'Your Workflows' and 'Templates'. The main content area is titled 'What do you want to build today?' and includes a sub-header: 'Try out an easy-to-customize template and get inspired to build your own workflows.' There are six template cards arranged in a 2x3 grid:

- A warm welcome for new teammates:** Send a welcome message using **New channel member** that people will get as soon as they join your channel. (Set Up button)
- A way to triage requests:** Add a **Shortcut** that lets people easily submit requests to your channel. (Set Up button)
- Daily stand-ups & check-ins:** Set up a daily reminder using **Scheduled date & time** for your team to share their project updates. (Set Up button)
- A quick way to send info:** With **Emoji reaction**, you can automatically send a message when someone reacts to a conversation with a specific emoji. (Set Up button)
- A status update for the team:** Add a **Shortcut** that lets your team give updates on when they're out of the office, working remotely and more. (Set Up button)
- Start from scratch:** Want to tinker? Already a pro? Start with a fresh workflow. (Create button)

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Unlock more value from your existing tools and processes with Workflow Builder



Save time by streamlining daily tasks in Slack.

Automate recurring messages, common requests, and more!



Reduce back-and-forth by standardizing processes

Set clear expectations and collect details through custom forms and messages



Customize Slack to get more from your tools

Create workflows that are unique to the way your team works.

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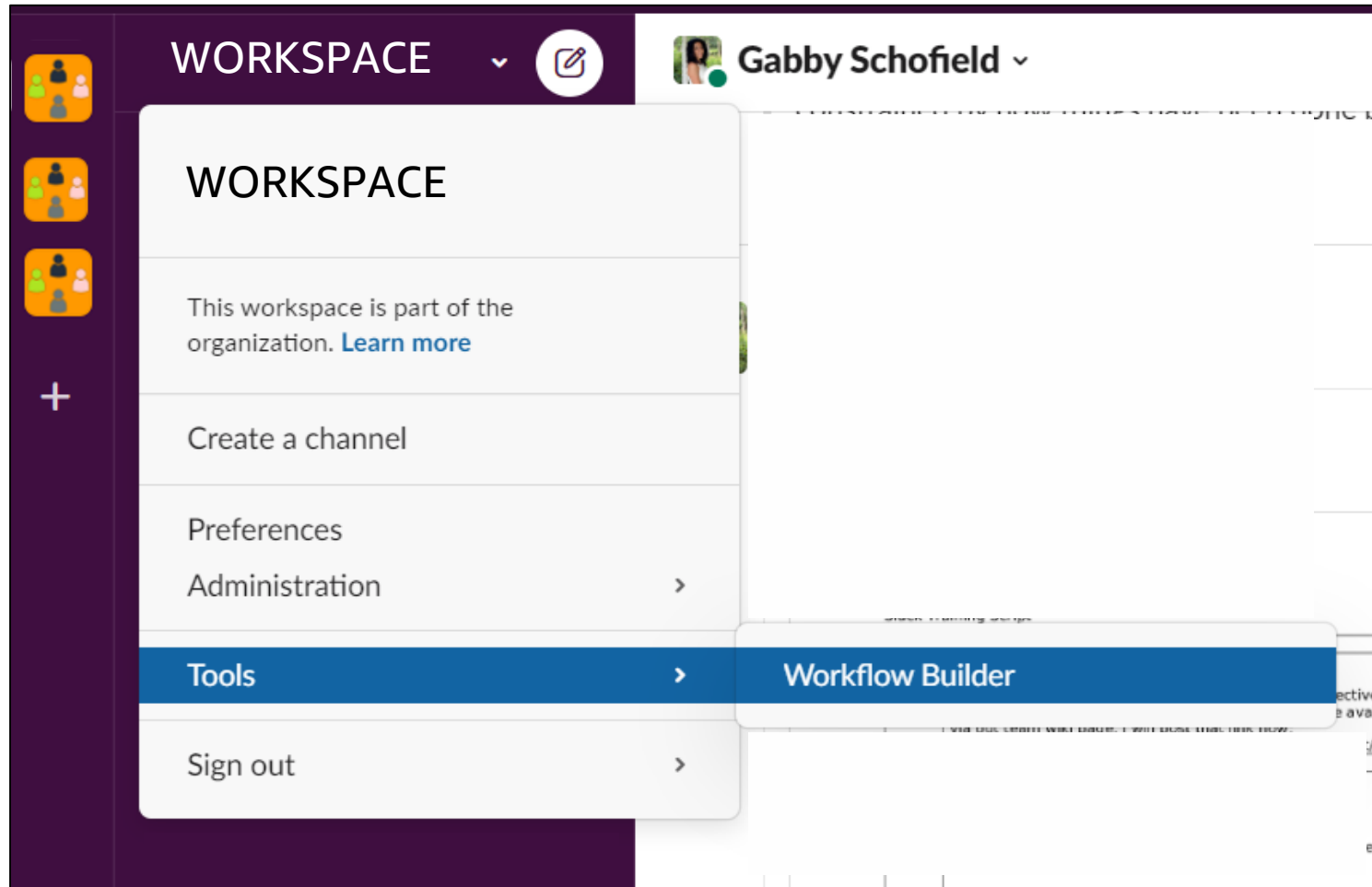
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Accessing Workflow Builder



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Choose a way to start this workflow ×



Shortcut

Someone selects the workflow from the available shortcuts in a channel

Select



New channel member

Someone joins a specific channel

Select



Emoji reaction

Someone adds a specific emoji reaction in a channel

Select



Scheduled date & time

Set a date and time for this workflow to start. Choose if you'd like the workflow to repeat.

Select



Webhook ADVANCED

Starts when an app or service sends a web request

Select

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Add a workflow step



Send a message

Slack

Add



Send a form

Slack

Add

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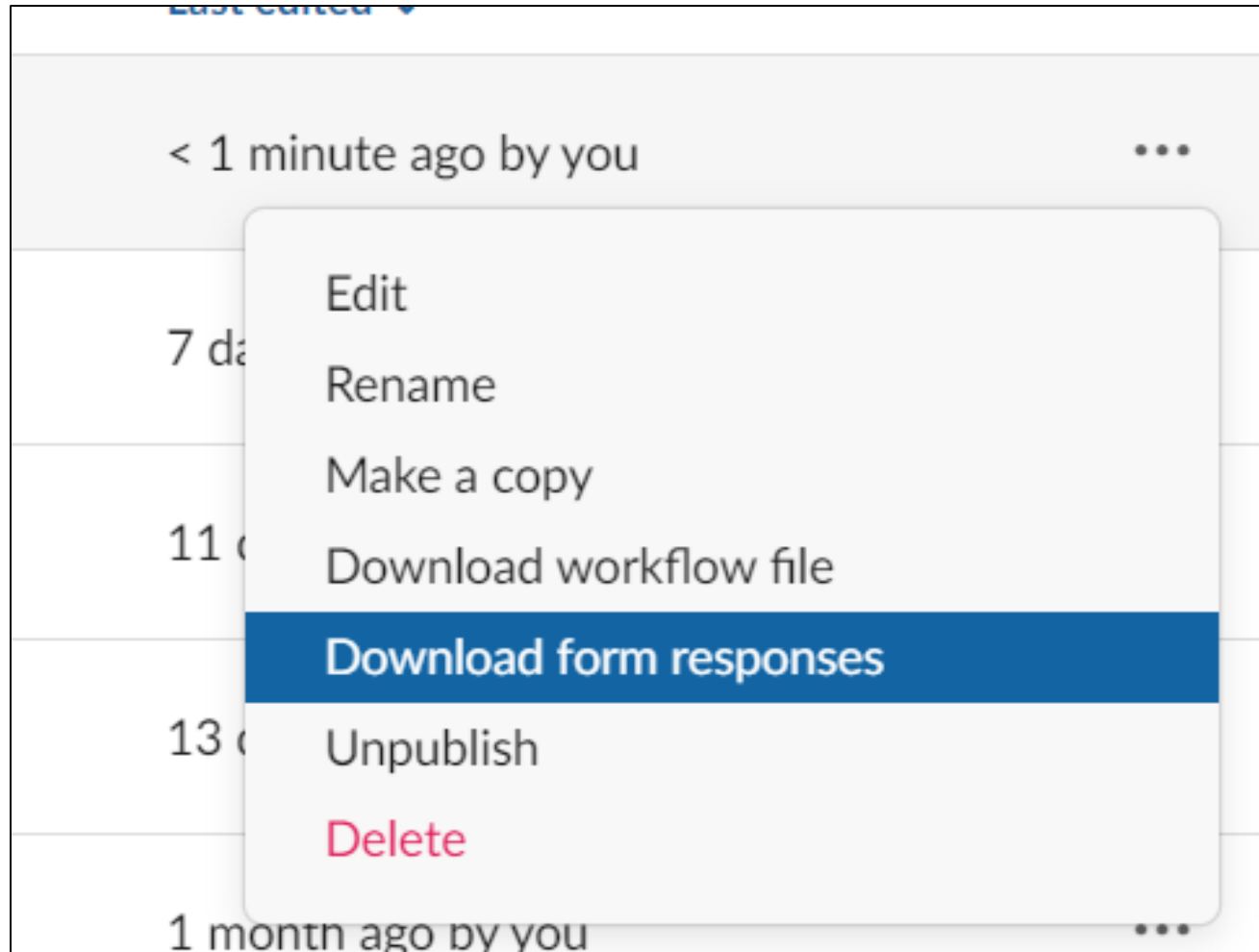
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Shortcut ✕

This workflow starts when someone selects it from the available shortcuts in a channel.

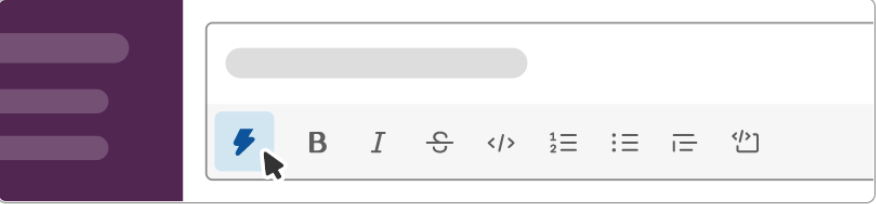
Which channel?

Add a short name

3

This name appears in the menu so try briefly describing what someone's about to do.

Example



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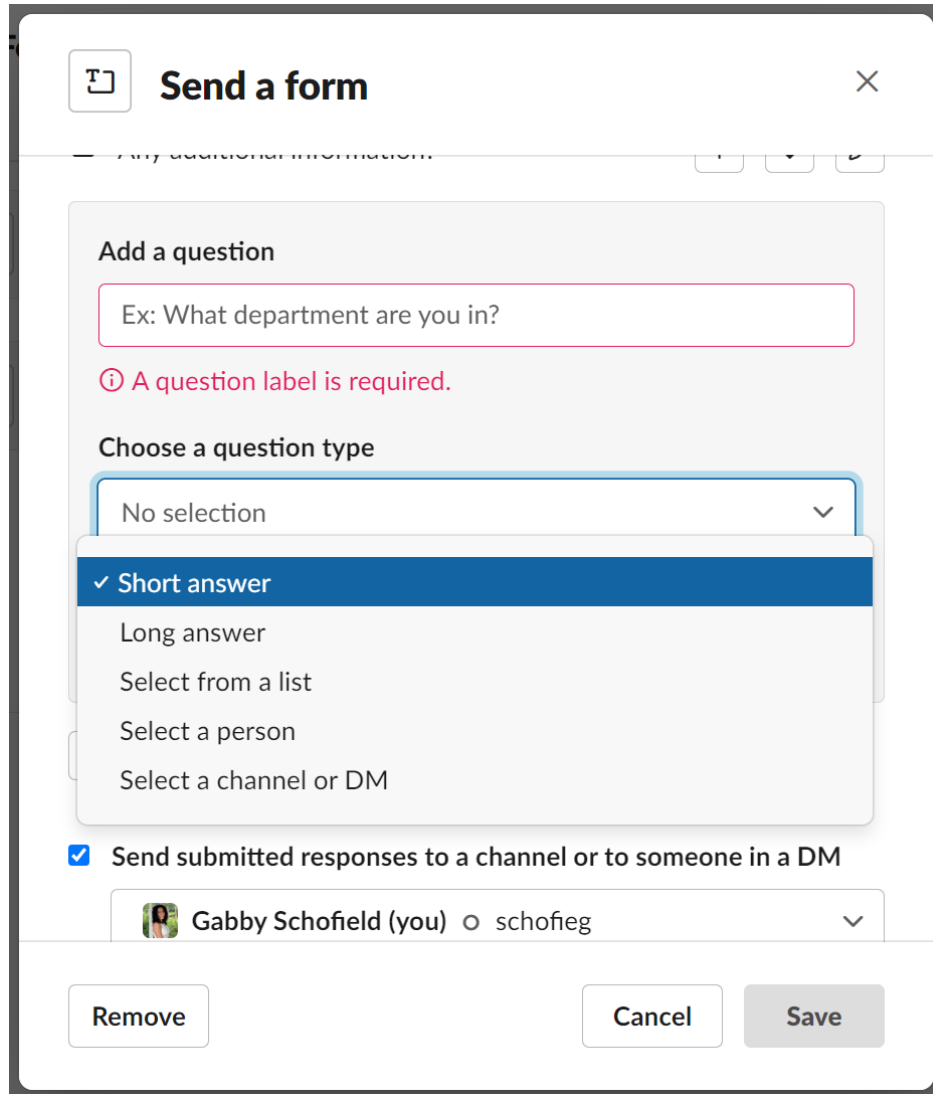
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The image shows a 'Send a form' dialog box with a close button (X) in the top right corner. Below the title bar, there is a section for 'Add a question' with a text input field containing 'Ex: What department are you in?'. Below the input field is a red error message: 'A question label is required.' Below this is a 'Choose a question type' section with a dropdown menu. The dropdown menu is open, showing options: 'No selection', 'Short answer' (which is selected with a checkmark), 'Long answer', 'Select from a list', 'Select a person', and 'Select a channel or DM'. Below the dropdown menu is a checked checkbox labeled 'Send submitted responses to a channel or to someone in a DM'. Below the checkbox is a dropdown menu for the recipient, showing 'Gabby Schofield (you)' with a profile picture and the ID 'schofieg'. At the bottom of the dialog are three buttons: 'Remove', 'Cancel', and 'Save'.

Send a form

Any additional information:

Add a question


Ex: What department are you in?

A question label is required.

Choose a question type

- No selection
- ✓ Short answer
- Long answer
- Select from a list
- Select a person
- Select a channel or DM

Send submitted responses to a channel or to someone in a DM

 Gabby Schofield (you) schofieg

Remove Cancel Save

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Starts from "Submit budget request" shortcut in [test-gs-channel](#)

Edit



Open a form

Edit

Budget Request

- What is you project ?
- What budget is required?
- When is it required?
- Any additional information?

Add Step

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Summary

Send a message

Send this message to:

Person who clicked "Submit budget request"

Message text

Hello Person who clicked "Submit budget request"
Thank you for submitting your request. We will come back to you by end of quarter with a response on whether this budget is approved.

B *I*

[Insert a variable](#)

Include a button
You can add a button to this message. Clicking it will move people to the next step of the workflow.

Preview

Budget Request Form WORKFLOW
Hello @Variable User

Cancel Save

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The screenshot shows a workflow builder interface for a "Budget Request Form". At the top, there is a back arrow, a logo, the title "Budget Request Form", and the status "Never Published" with a green "Publish" button and a menu icon. Below the title are tabs for "Workflow", "Activity", and "Settings". The workflow consists of three steps:

- Step 1:** Starts from "Submit budget request" shortcut in [test-gs-channel](#). Includes an "Edit" button.
- Step 2:** Open a form. Includes an "Edit" button. The form content is:
 - Budget Request**
 - What is your project ?
 - What budget is required?
 - When is it required?
 - Any additional information?
- Step 3:** Send a message to [Person who clicked "Submit budget request"](#). Includes an "Edit" button. The message content is:
 - Budget Request Form** WORKFLOW
 - Hello [@Variable User](#)
 - Thank you for submitting your request. We will come back to you by end of quarter with a response on whether this budget is approved.

At the bottom of the workflow, there is an "Add Step" button.

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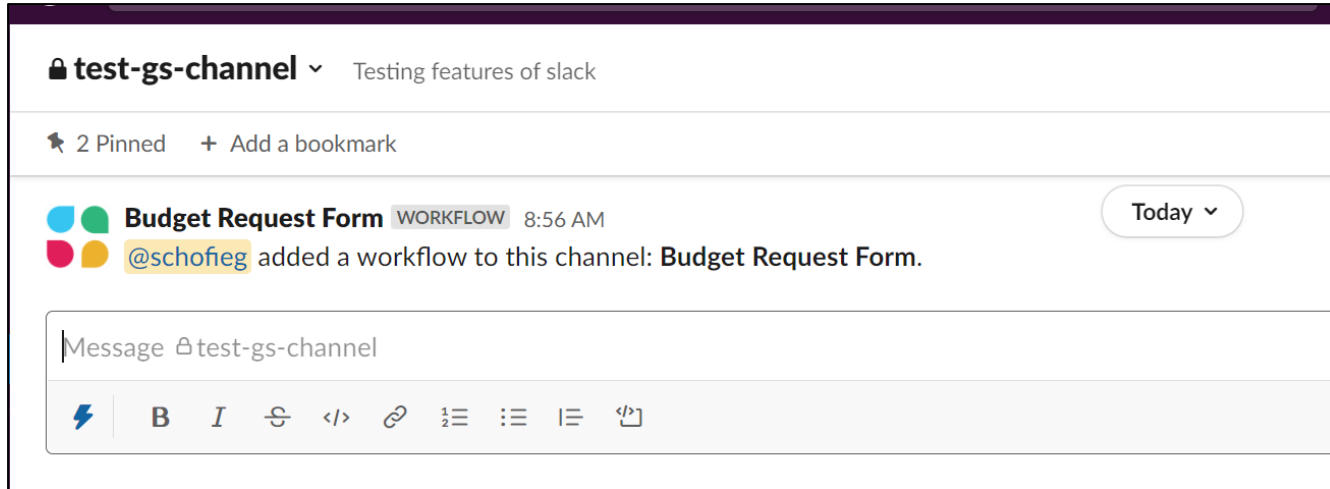
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Summary

Created for test-gs-channel








 Submit budget request

Start a call

Other Suggestions

-  /poll "What is your favourite color ?" "Red" ...
OpenPoll - Create a poll
-  /remind [@someone or #channel] [what] [...]
Set a reminder
-  /export
Opus - Export the conversation!
-  Create new poll with OpenPoll

Q Search shortcuts

 | **B** *I*      

Budget Request 🔗 ✕

What is your project ?

What budget is required?

When is it required?

Any additional information?

Close Submit

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Example Build



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Summary

Search Amazon 

 **Slackbot** ▾

  **Budget Request Form** WORKFLOW 9:00 AM Today ▾

  Budget Request submission from [@schofieg](#)

What is you project ?
test

What budget is required?
1000-2000

When is it required?
test

Any additional information?
other

Message Slackbot

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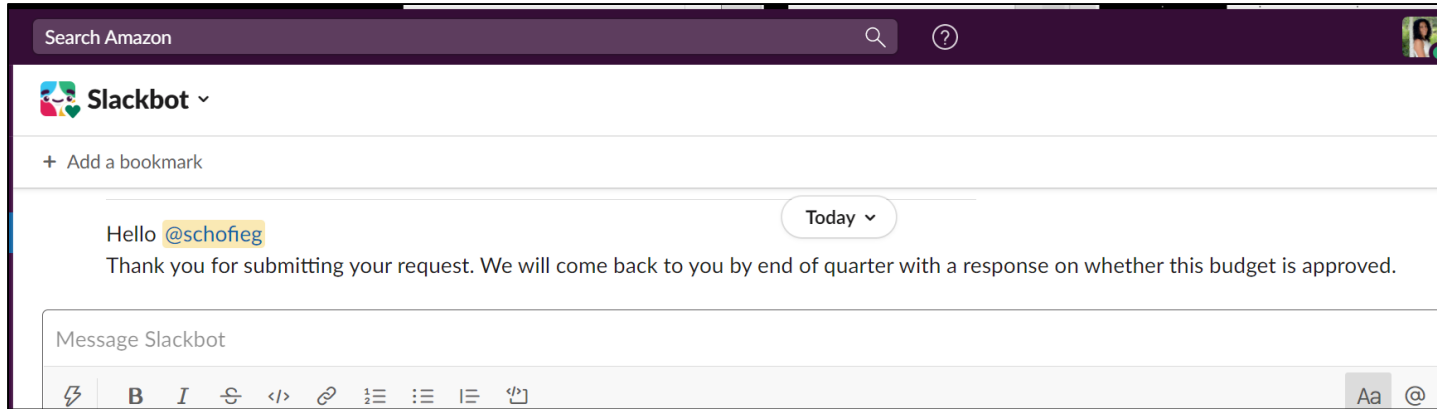
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Demo Build: Weekly Status Report

Follow along in your own practice channel or just watch as I show the steps we learned in action.

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The screenshot displays a workflow builder interface for a 'Team Standup' workflow. The workflow consists of two steps:

- Scheduled date & time:** Starts March 16th at 9:45am and repeats every weekday. An **Edit** button is visible.
- Send a message:** Sends a message to: #proj-echo-team. An **Edit** button is visible.

The final output of the workflow is a message in a thread:

Team Standup WORKFLOW
☕ Good morning @echo-team! Don't forget to post your standup in thread.
Be sure to include:

- What you worked on yesterday
- What you plan on working on today
- Any blockers

An **Add Step** button is located at the bottom of the workflow builder.

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The screenshot displays a workflow builder interface with the following steps:

- Step 1:** Triggered by "Starts when someone reacts with in #daily-standup".
- Step 2:** "Send a form to" Person who reacted". This step includes a sub-section for "Submit status" (WORKFLOW) with an "Open Form" button and a list of questions:
 - What are your key priorities?
 - Do you have any blockers?
 - Can someone help you with this blocker?
 - What is your spirit animal?
- Step 3:** "Send a message to" Response to: "Can someone help you with this blocker?". The message content is:

Hello @Variable User
@Variable User has raised a blocker that you can support - please check out #procurement-daily-standup for more information.

An "Add Step" button is located at the bottom of the workflow.

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The screenshot displays a Slack workflow builder interface with three steps:

- Step 1: New channel member**
 - Icon: #+
 - Description: Automatically start this workflow when someone joins #team-channel
 - Action: Edit
- Step 2: Send a message**
 - Icon: Paper plane
 - Description: Sends a message to a person or channel
 - Action: Edit
 - Message Content:
 - From: Onboarding Bot (APP)
 - Text: Hey @Example User.
 - Text: Excited to have you on the team. Here's some important info to help bring you up to speed on what's going on in the #example-channel channel.
 - Section: Pinned resources:
 - Project Overview: <https://docs.google.com/presentation/ab>
 - Project Timeline: <https://docs.google.com/presentation/cdef>
 - Ongoing Notes: <https://docs.google.com/document/ghij>
 - Text: Also, just a friendly reminder that there are a few external guests in this channel, so please be mindful of what you share! 🙏
- Step 3: Collect form responses**
 - Icon: Paper plane
 - Description: Send a message with a link to a form with 3 questions
 - Action: Edit
 - Message Content:
 - From: Onboarding Bot (APP)
 - Text: Tell us about yourself!
 - Form: Your Team Intro
 - Arrow: ↓
 - Form: Your Preferred Name
 - Form: Tell us about you!
 - Form: Share a fun fact!

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Summary

Shortcut
Starts when someone selects Report an Incident from the available shortcuts in #help-incidents [Edit](#)

Create a form
Send a custom form to a person or channel [Edit](#)

INCIDENT REPORT

- Incident Type
- Incident Summary
- Urgency of your request
- Anything else we should know

Send a message
Sends a message to: #team-incidents [Edit](#)

Incident Manager WORKFLOW

Incident Report:

Urgency: Variable text

Incident Type
Variable text

Submitted by
@Variable User

Summary of Incident
Variable text

Other Details: Variable text

Next Steps:
Please discuss in-thread & determine appropriate next step. The point person should [claim for review](#) and follow up with [@Variable User](#) directly.

[Claim for review](#)

Report an Incident

Incident Type
Security

Incident Summary
Stolen Laptop

Urgency of your request
Choose an option...
Choose an option...
• 48 hours
• 24 hours
• 1 hour

[Learn more about Incident Manager](#) [Cancel](#) [Submit](#)

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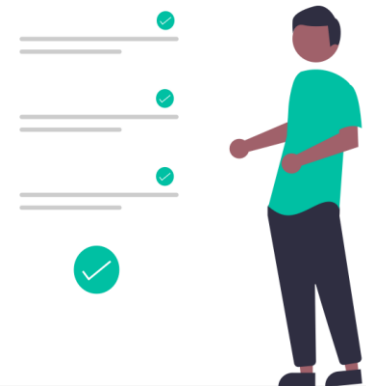
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Summary

- Identify areas you automate: reoccurring messages, requests, status updates, etc
- Create from scratch or use a template
- Determine how to initiate your workflow
- Setup your workflow steps (messages or forms)
- Verify where responses are going if you have a form
- Add confirmation message
- Personalize with variables/icons
- Download form responses as needed



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Summary

Contact us:

Email: xxxxx

To accommodate multiple time zones, we offer office hours two times per week:

- Wednesdays | 2:30p - 3:15pm (EST) | Meeting ID: 8736 37 1302
- Fridays | 9am - 9:45am (EST) | Meeting ID: 2029 25 4764

