Slack Workflow Integration

Mavilyn Carlos - 2026-11-28 - Premium Workflow Actions (

> If you've opted to have the Premium Feature Upgrade, you now have access to additional Premium and AI features within your account. If you do not have the Premium and AI features and would like to consider an upgrade, please email hello@usekilo.com

Workflow Slack Premium Action is an advanced communication feature designed to automate and streamline messaging within Slack, a widely used team collaboration tool. This feature allows users to send targeted messages to specific users, private or public channels within their Slack workspace. A user-friendly interface and customizable options ensure effective communication by enabling users to set up and schedule notifications based on their needs.

The action offers three main events:

Sending a message to a user:

Users can choose from four options to send a direct message to the right person: Assigned User, Custom Email, Internal User, or Slack User. Each option serves a unique purpose in determining the Message's recipient, ensuring accurate and efficient communication.

Sending a message to a private channel

Users can select a private channel within their workspace to send messages, which will appear as if sent manually by the User who created the Slack integration. This allows for secure communication within a select group of team members.

Sending a message to a public channel:

Users can choose a public channel within their workspace to broadcast messages, making information accessible to all workspace members.

Send Direct Message to a User

You will have four options if the event is Send Direct Message to User.

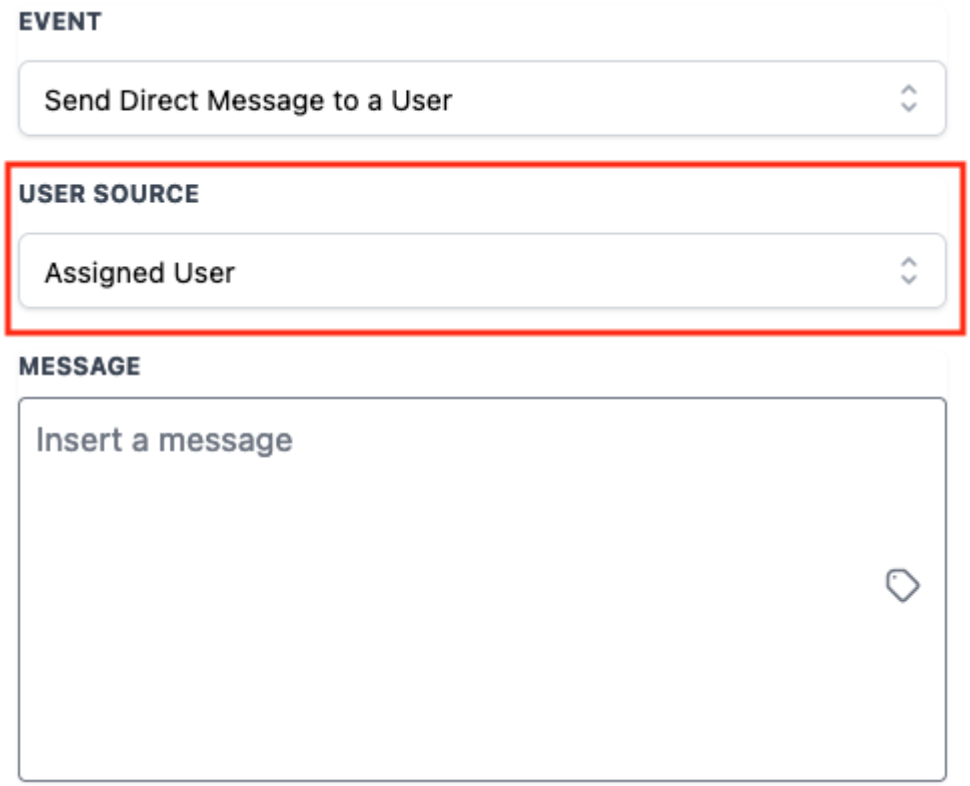
- Assigned User - Assigned User of the Contact
- Custom Email - Add a specific email to search your Slack Workspace for the User and then send out the Message

- Internal User - Users from your account
- Slack User - Directly search your Slack Workspace Users by name.

Different Types of User Sources and Their Use Cases

Assigned User (of contact)

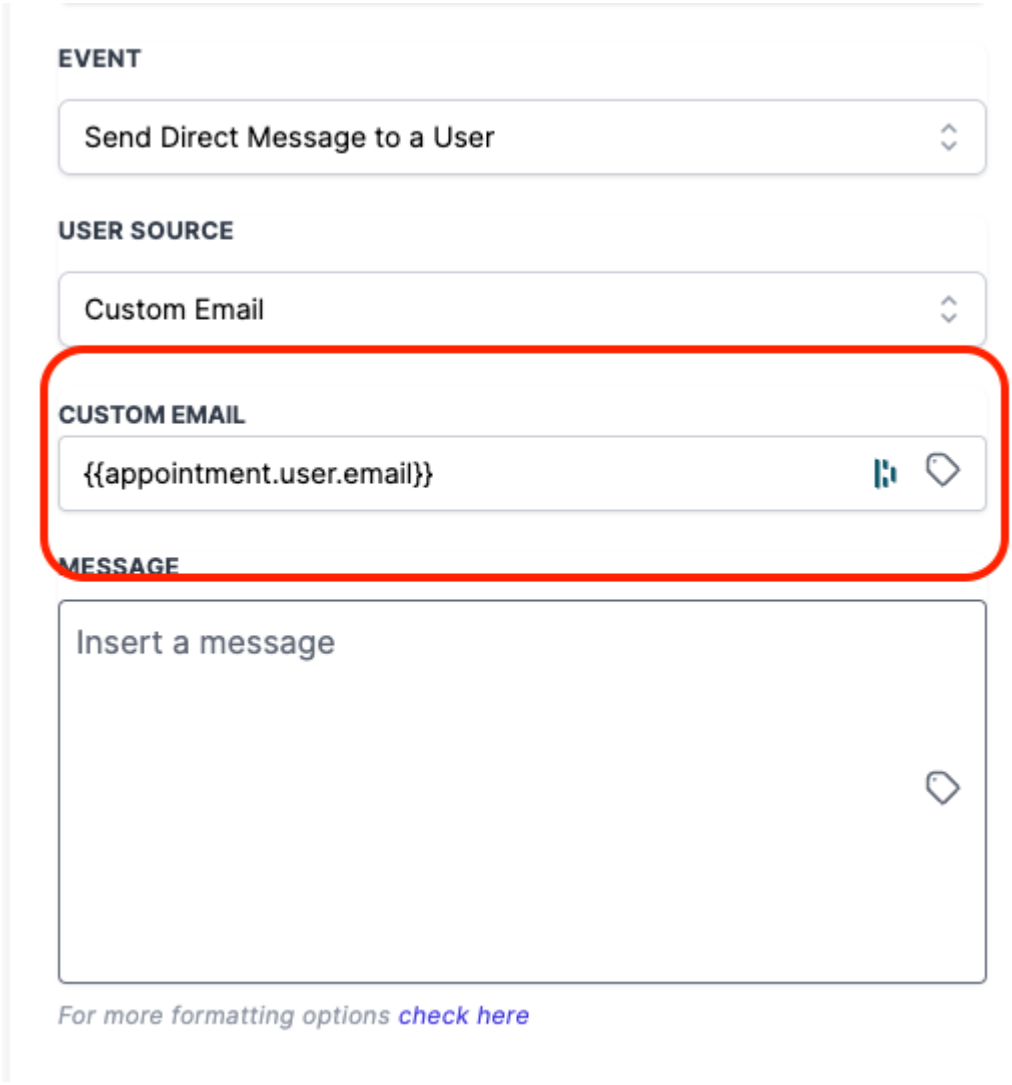
This is used to send out notifications for the assigned contact user. In this case, the User's email (in settings>My Staff> User Info) for the User Assigned to the contact is used to find the Slack user.



Custom Email

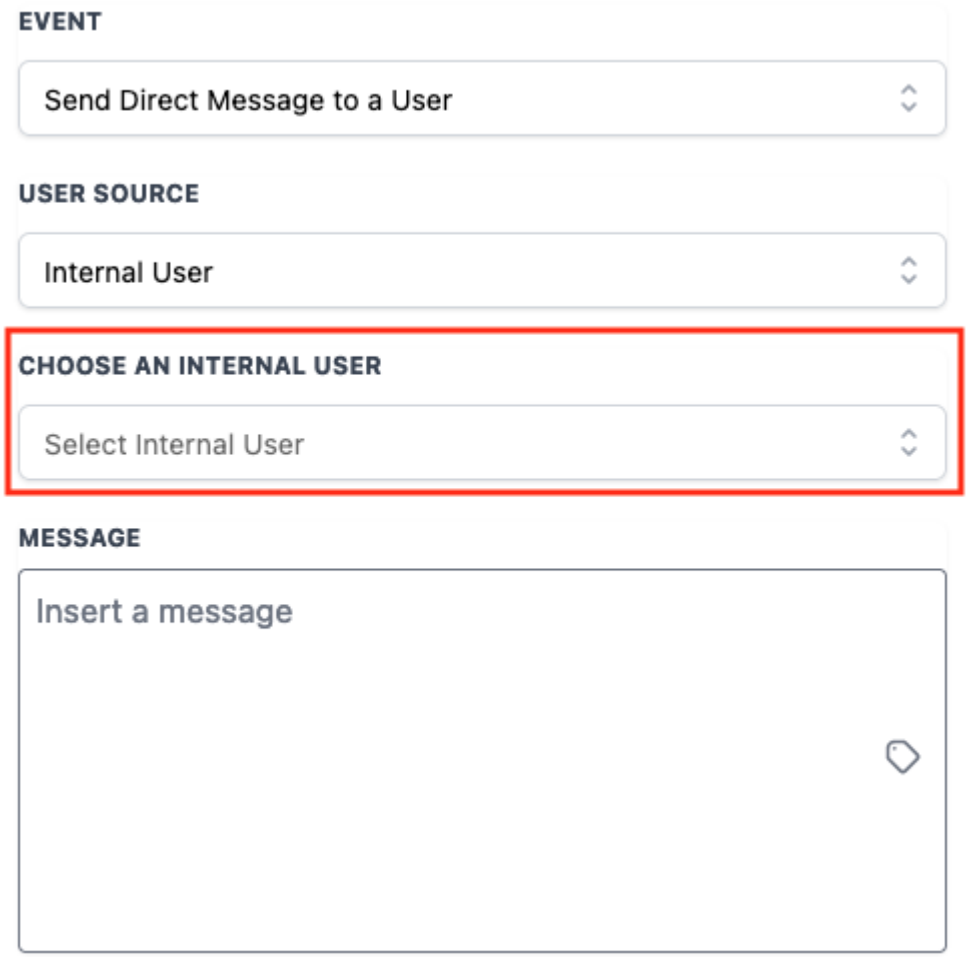
This is used for all the cases where you need a dynamic user to send notifications to. The custom email that is filled in is used to find the matching of a Slack user.

This is for all those cases where you do not have the User predefined. Either type in the email or select from a list of custom variables using the custom variable picker.



Internal User

Use this option to send a message to one of the account users. You were typically used to send notifications to particular users responsible for certain sections of your business. Say, sending out information on a successful opportunity won to your finance head. The email of the Internal User selected is used to find the Slack user here.

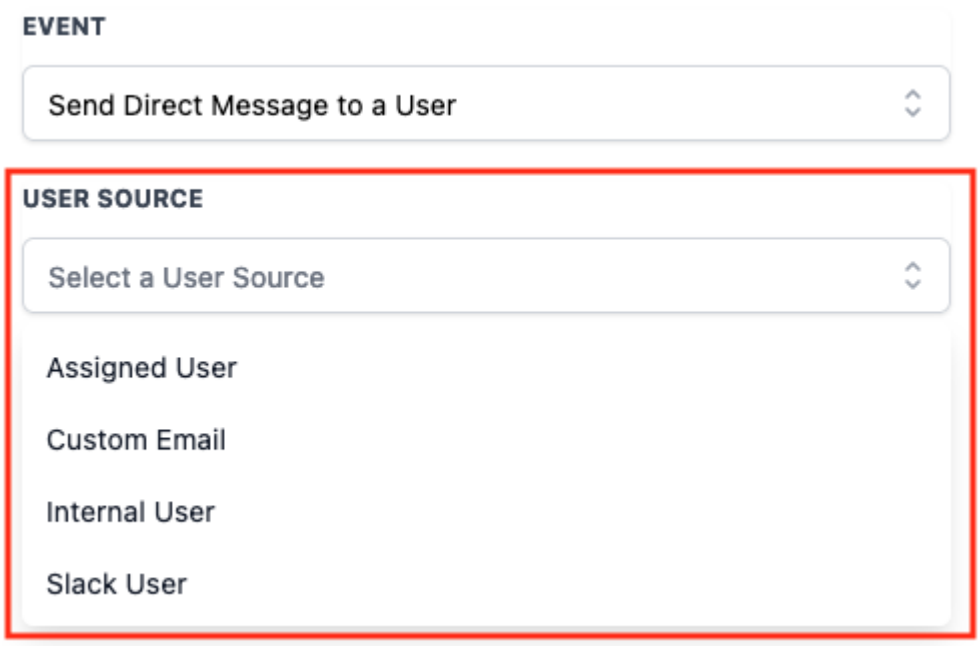


Slack User

This is as simple as it sounds. Send a direct message to any Slack user of your workspace.

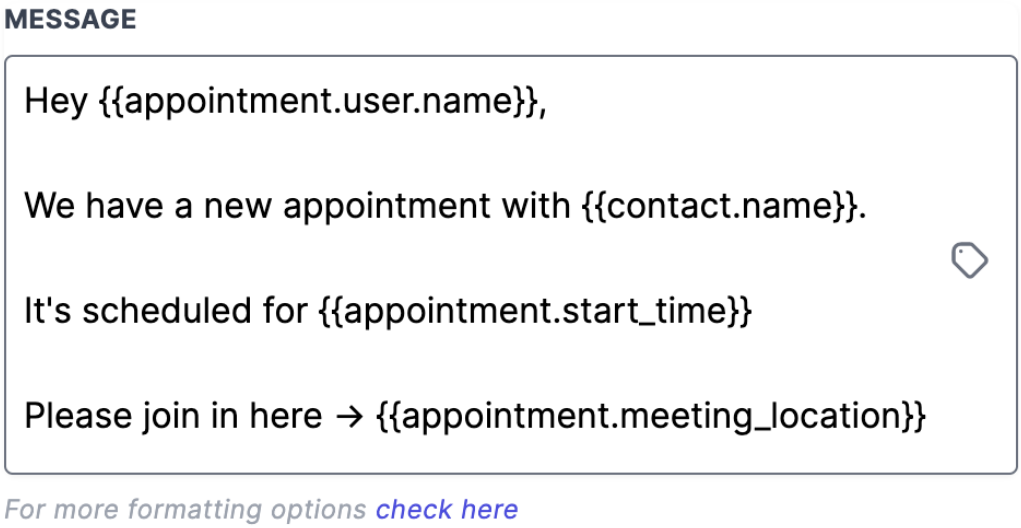
Select a User Source

To start, select one of the four User Sources provided.

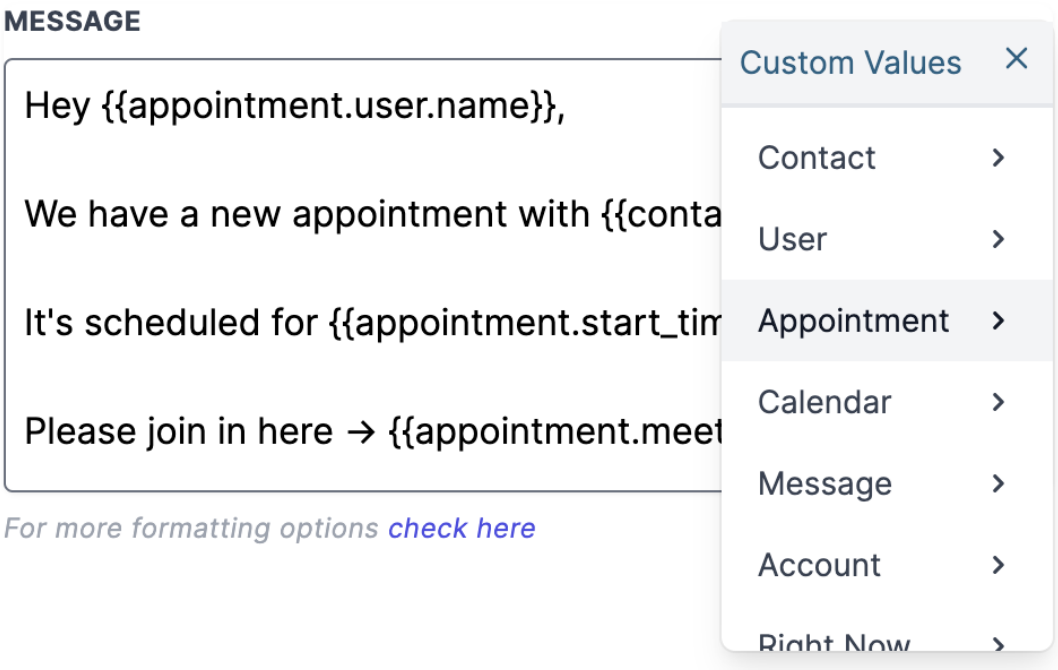


Message Content

Insert Message to send Direct Message to a User.



You can use the extensive custom variable picker to send information about a contact or any CRM-related information.

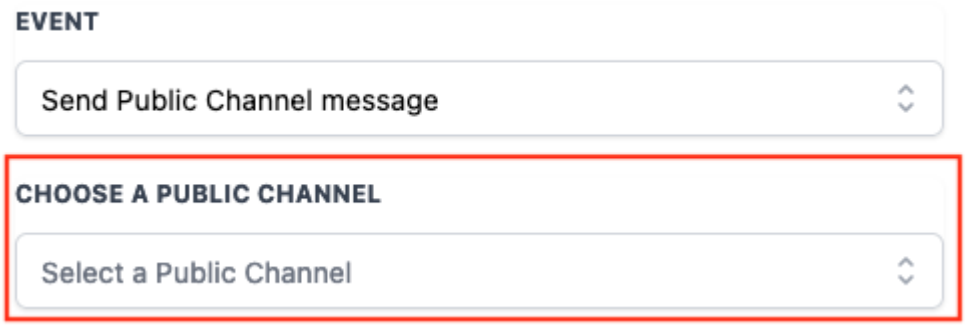


Send a Public Channel message.

If the event is Send Public Channel Message, you must select which Public Channel you want to send messages to.

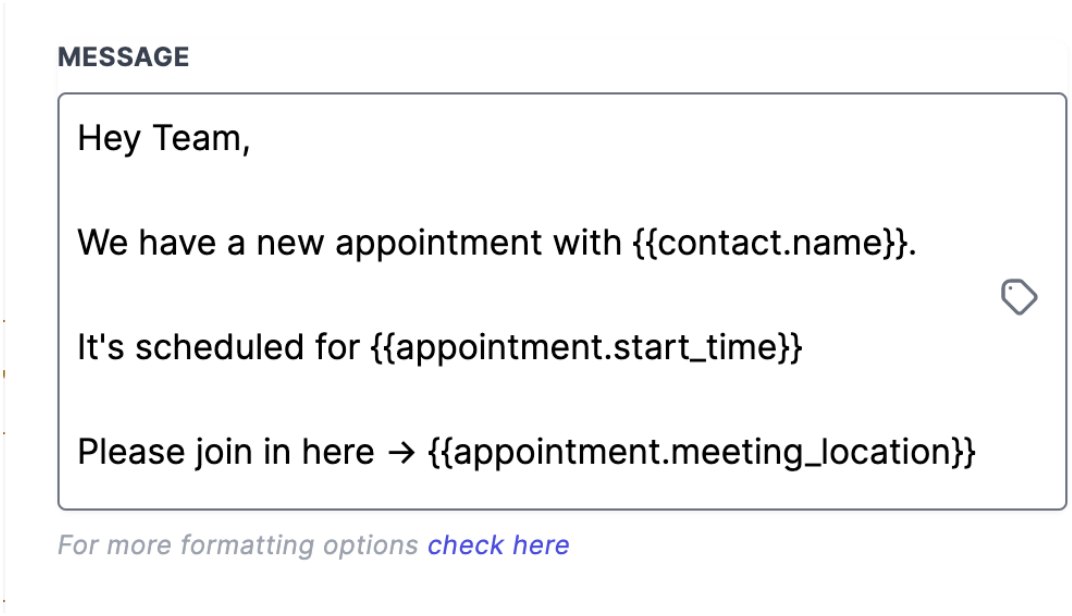
Choose a Public Channel

Select the desired channel to send the Message.

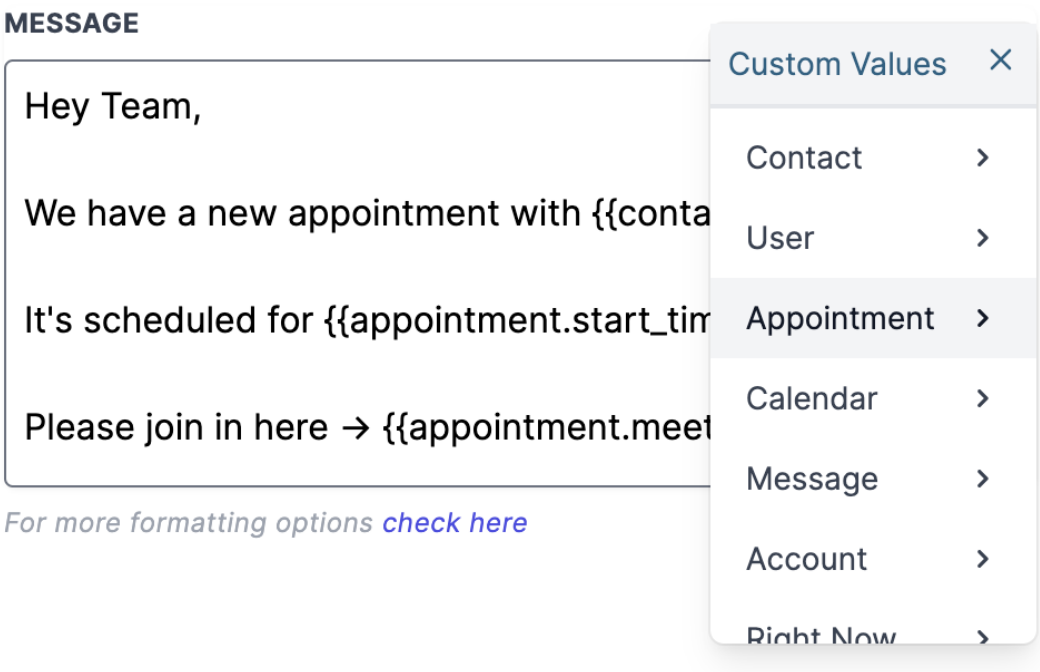


Message Content

Insert Message to send to the Public Channel.



You can use the extensive custom variable picker to send information about a contact or any CRM-related information.

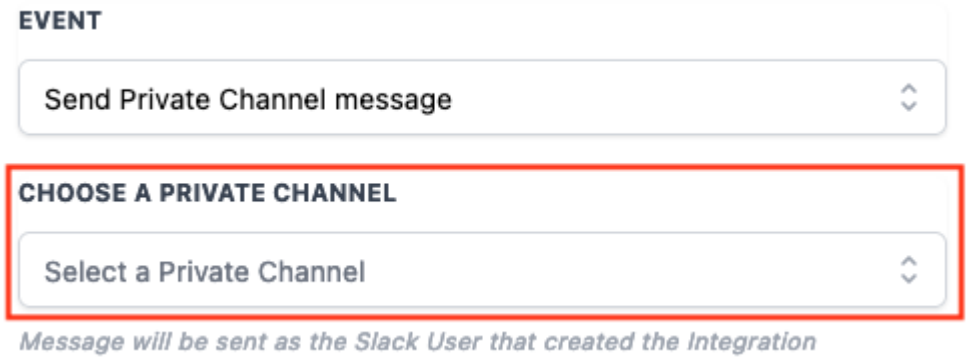


Send a Private Channel message.

If the event is Send Private Channel Message, you must select which Private Channel you want to send messages to.

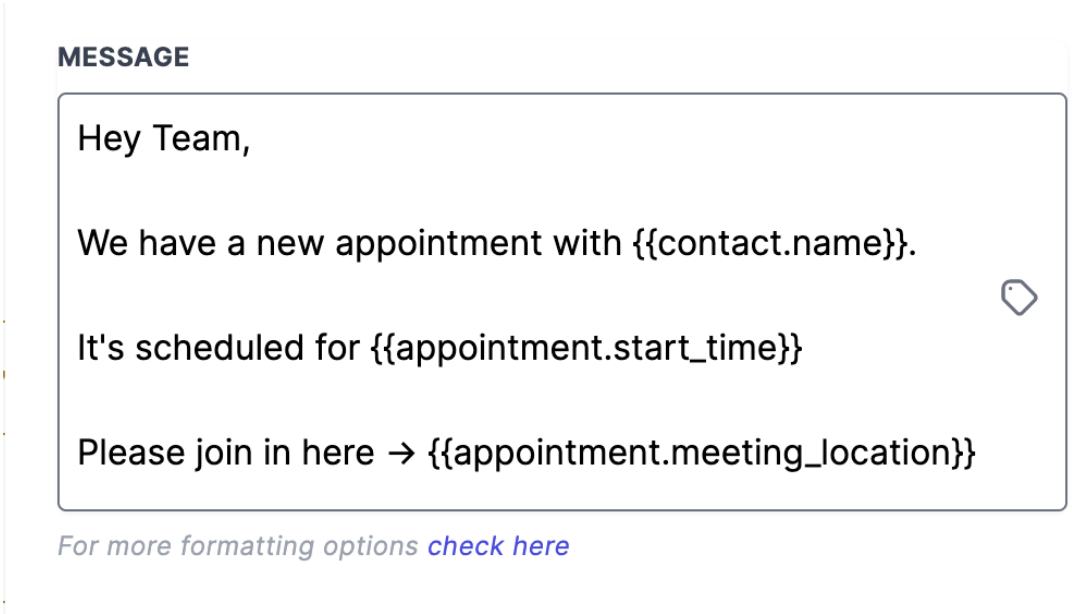
Choose a Private Channel

Select the desired channel to send the message.



Message Content

Insert Message to send to the Private Channel.



You can use the extensive custom variable picker to send information about a contact or any CRM-related information.

MESSAGE

Hey Team,

We have a new appointment with {{conta

It's scheduled for {{appointment.start_tim

Please join in here → {{appointment.meet

For more formatting options check here

Custom Values

- Contact
- User
- Appointment
- Calendar
- Message
- Account
- Right Now