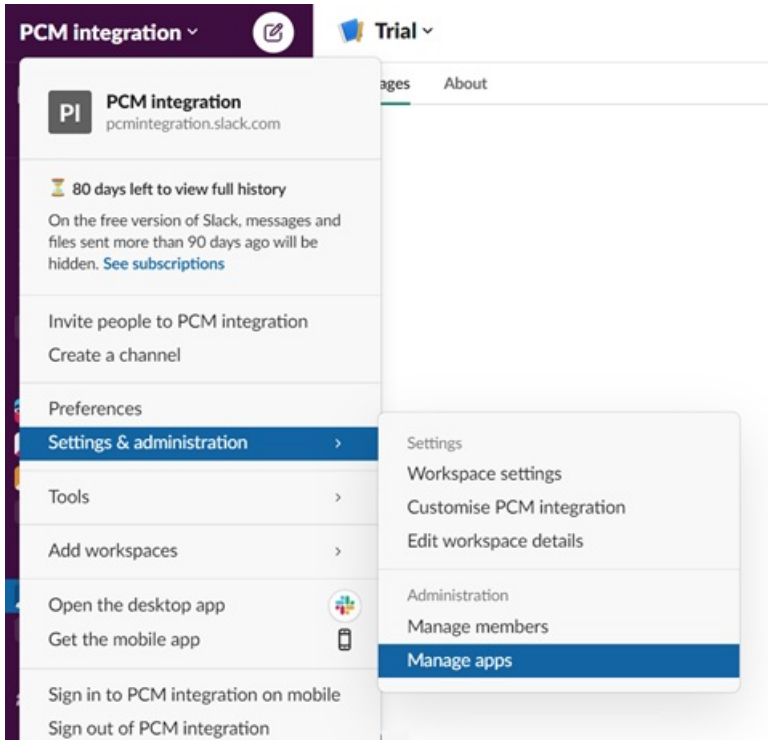


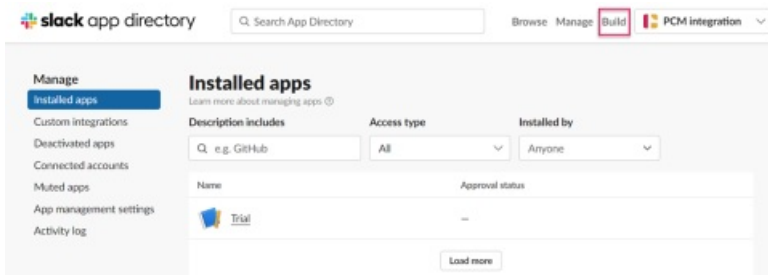
Slack Integration with Puzzel Case Management

To Integrate Slack into Puzzel Case Management, you need to:

1. Click on your Slack workspace name at the top-left-hand side and navigate to Settings & administration -> Manage apps to open the Slack app directory.



2. Click on **Build** in the top menu bar to open the Slack api window.



3. Click on **Create New App** button and select **From Scratch**. Give your app a suitable name, select the appropriate workspace and click **Create App** button.
4. Click on Incoming Webhooks box and toggle Activate Incoming Webhooks option to **ON**. Click on **Add new Webhook to Workspace**.

5. Select a channel where the messages should be posted to and click **Allow**.



Slack PCM integration is requesting permission to access the PCM integration Slack workspace

Where should Slack PCM integration post?

Slack PCM integration requires a channel to post to as an app

pcm-integration

Cancel Allow

6. A new Webhook URL will be generated. Copy the url to the clipboard to use it in Puzzel Case Management.

Webhook URL	Channel	Added By
https://hooks.slack.com/services/ Copy	#pcm-integration	jayanthi.kumar Oct 4, 2022

Add New Webhook to Workspace

7. In Puzzel Case Management, click on Settings -> Integrations -> Outbound Integrations -> Webhooks. Click on **New Webhook** and copy the URL from Slack into the URL bar. Give your Webhook a name, make sure **Method** is set to POST, and **Authenticates via** is set to None. Click **Save**.

slack integration

URL*

Name*

Method*

Authenticates Via*

Custom headers

Name	Value *	
<input type="text" value="New Attribute Name"/>	<input type="text" value="New Attribute Value"/>	<input type="button" value="+"/>

8. Create your Schema: Settings -> Integrations -> Outbound Integrations -> Schemas. Then click “New Schema”. Give your Schema a Name, Content Type: JSON. Content should be written in the following format:

Schema Details

Name

Content Type

Content

```
{
  "text": "Hello, Customer: {{customer.name}} has an escalated case requiring your attention. Link: https://product.logicalware.com/tickets/{{ticket.ticket_ref}}"
}
```

```
{
  "text": "Hello, Customer: {{customer.name}} has an escalated case requiring your attention. Link: https://example.logicalware.com/tickets/{{ticket.ticket_ref}}"
}
```

9. Create an Event Rule condition to trigger your webhook by navigating to Settings -> Productivity -> Event Rules. Learn more about creating Event rules [here](#).

Example use case

As a supervisor, I would like an alert in Slack channel when an agent assigns a case directly to me. This will help me navigate to Puzzel Case Management through the link provided in Slack.

In the above example, I would create an event rule with a condition which looks as shown below. In the ‘Rule Actions’, select the webhook and the schema which should be used when the conditions of my rule are met.

In the above example, I would create an event rule with a condition which looks as shown below. In the ‘Rule Actions’, select the webhook and the schema which should be used when the conditions of my rule are met.

Rule Conditions

If **all** of the following conditions are met:

User	is equal to	Jayanthi Kumar	Remove
Ticket Event	is equal to	User Changed	Remove

[+ Add condition](#)

A notification will be sent to a slack channel if a ticket is assigned to you as shown in the image below.

