

 PDFfiller +  slack

PDFfiller for Slack

PDFfiller guidebook for integration

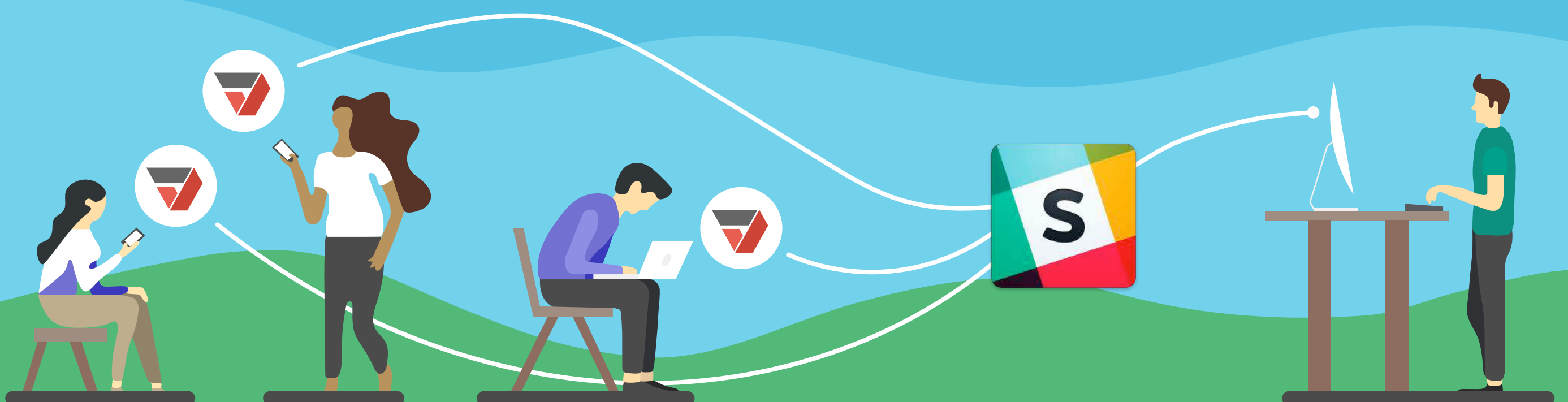


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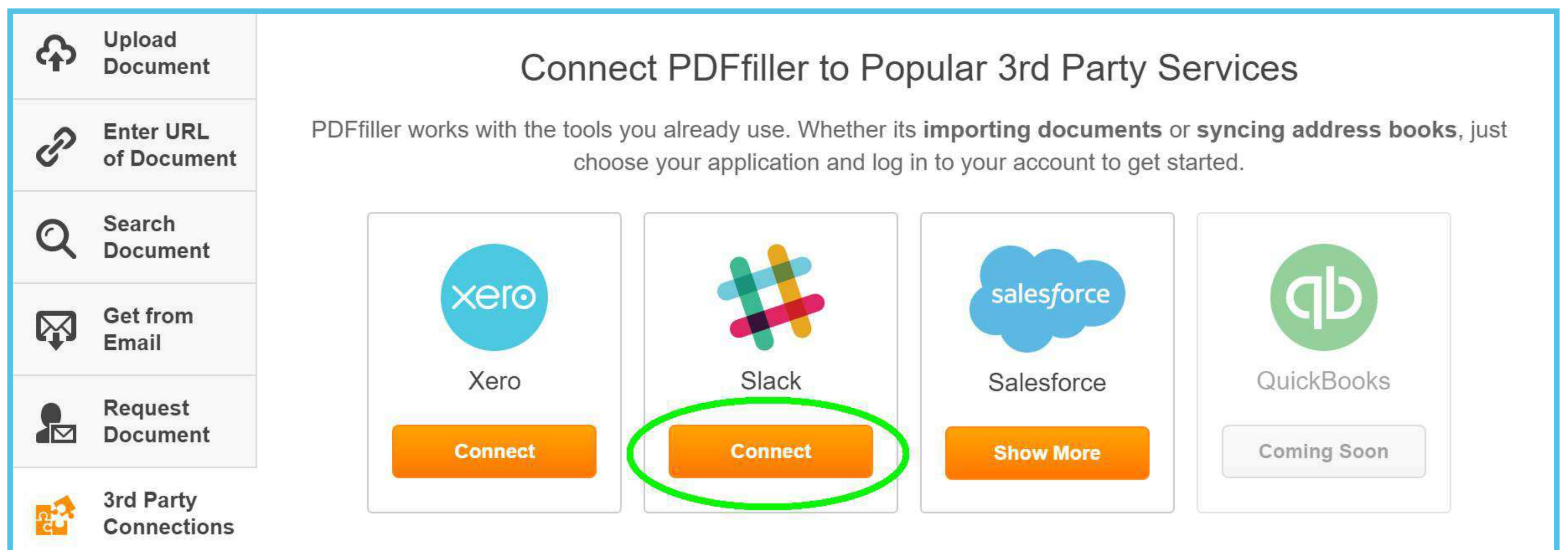
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PDFfiller for Slack

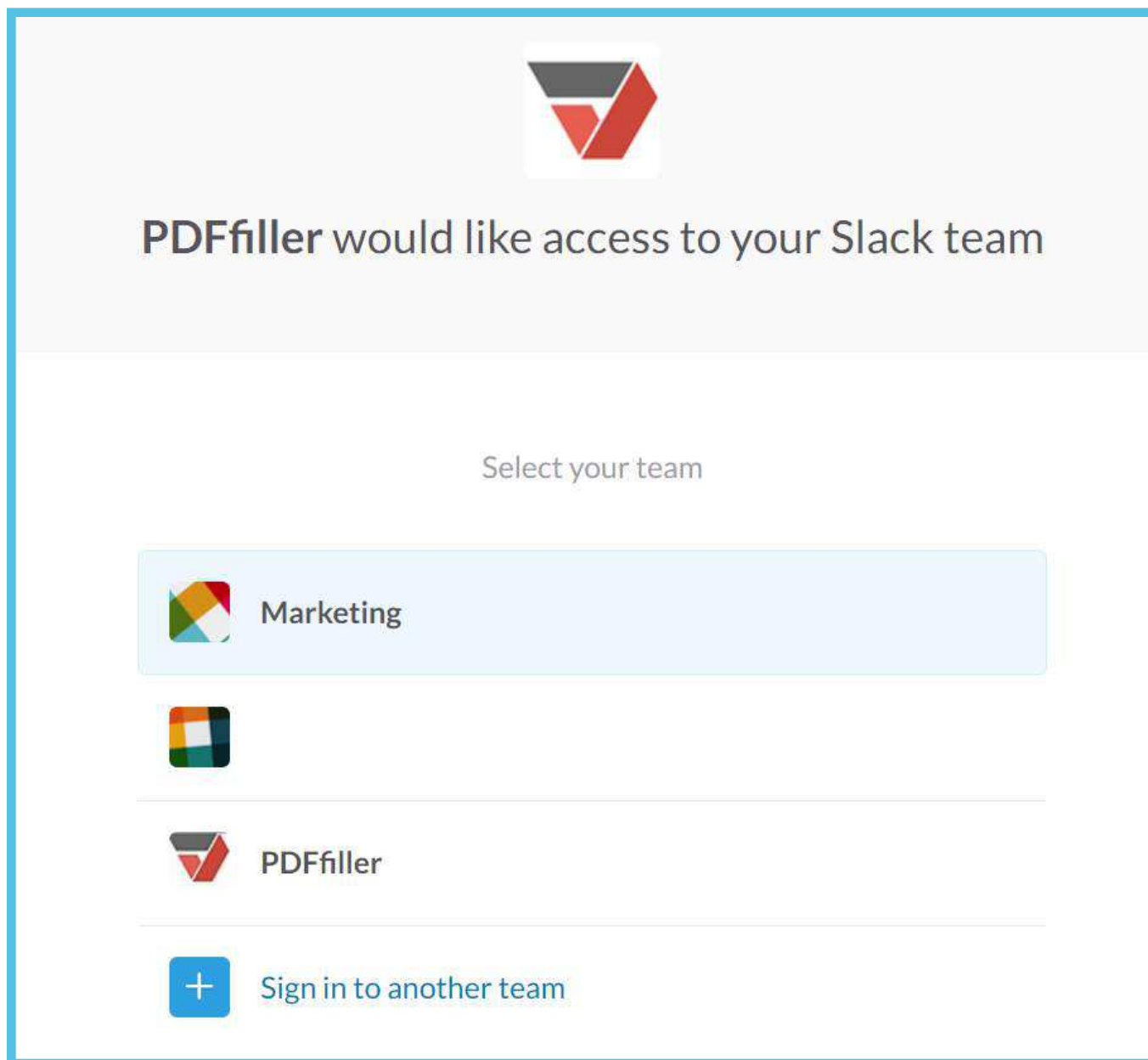
With PDFfiller's Slack App, sharing documents has become much easier and more reliable. Now, using our application you can immediately notify Slack users that you have emailed or shared with them a document, or requested their signature.

1. Connect PDFfiller to Slack.

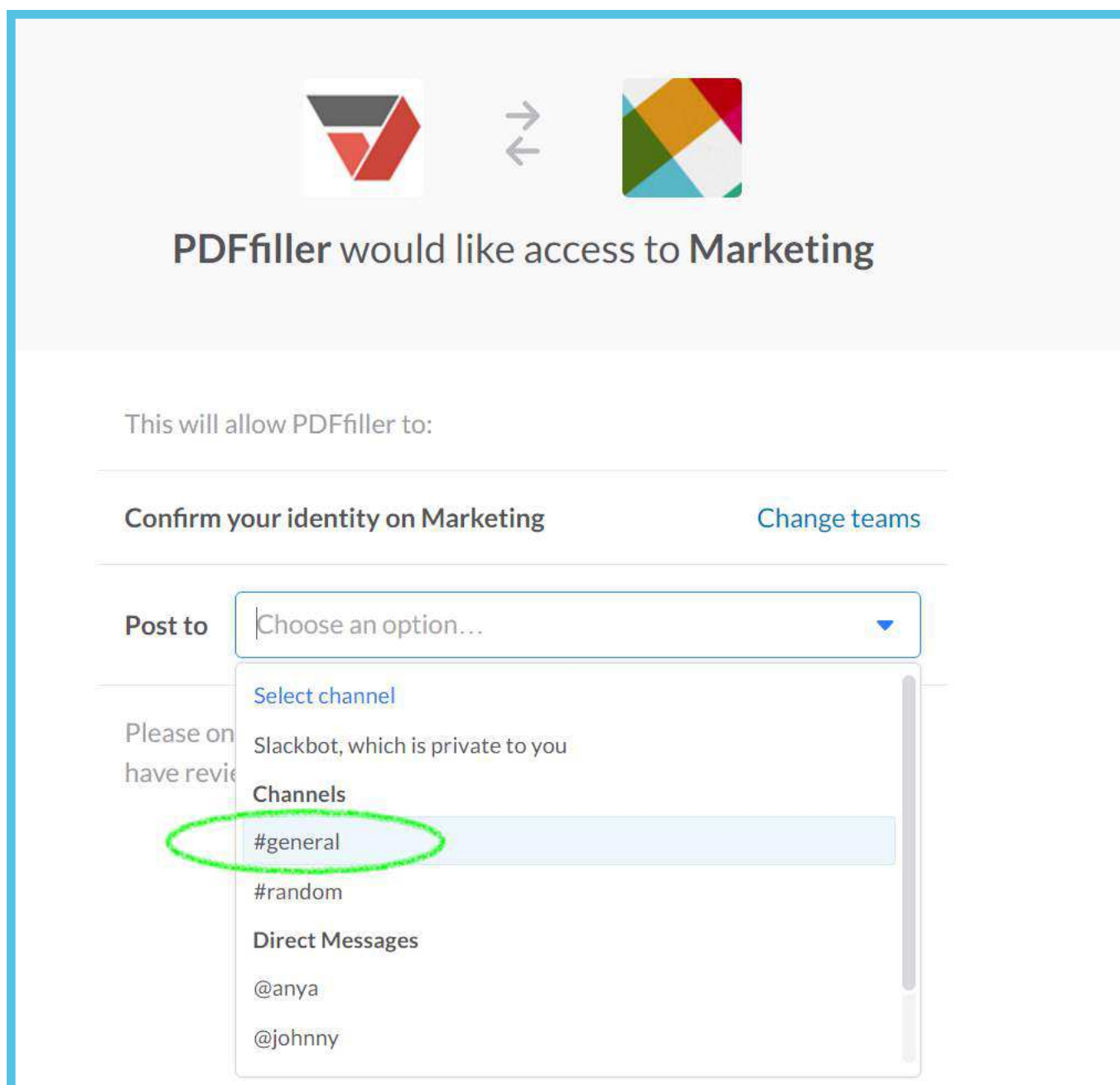
First, log in to PDFfiller, open the home page, select the **3rd Party Connections** tab and click the **Connect** button under the **Slack** icon.



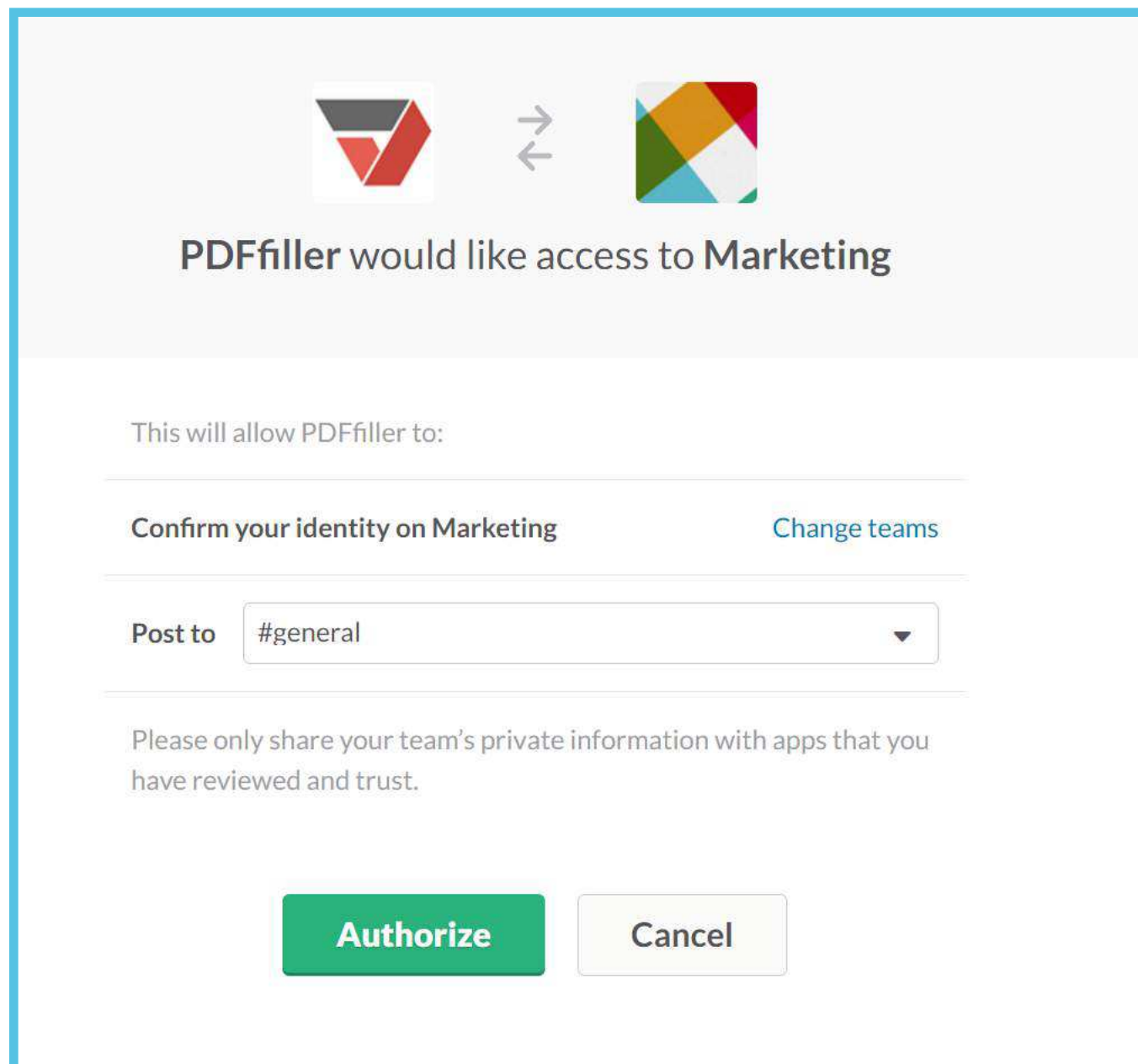
The screenshot displays the PDFfiller interface for connecting to third-party services. On the left is a navigation menu with options: Upload Document, Enter URL of Document, Search Document, Get from Email, Request Document, and 3rd Party Connections. The main content area is titled 'Connect PDFfiller to Popular 3rd Party Services' and includes a descriptive paragraph: 'PDFfiller works with the tools you already use. Whether its **importing documents** or **syncing address books**, just choose your application and log in to your account to get started.' Below this are four service cards: Xero, Slack, Salesforce, and QuickBooks. Each card features the service's logo, its name, and a button. The 'Slack' card's 'Connect' button is highlighted with a green circle. The 'Salesforce' card has a 'Show More' button, and the 'QuickBooks' card has a 'Coming Soon' button.



After that, PDFfiller will request access to your Slack team. Select your team to continue.

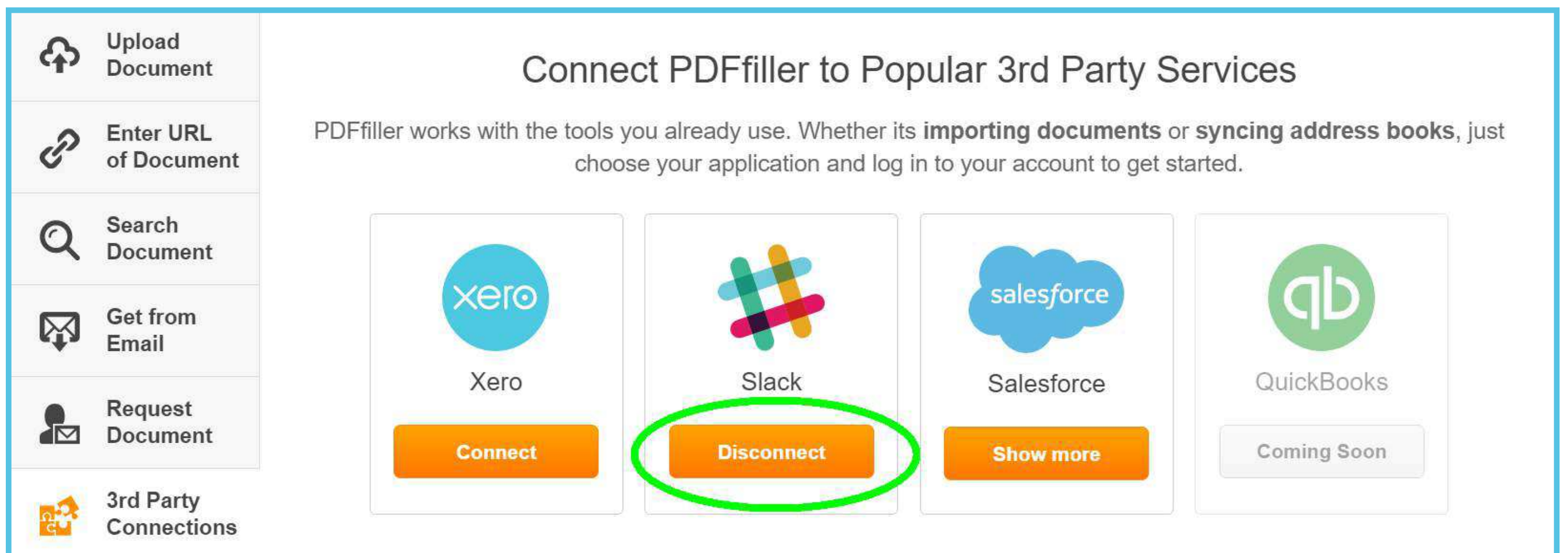


Select from the drop-down list a channel or a person whom you would like to notify when you email or share documents, or request their signatures,



and click the **Authorize** button.

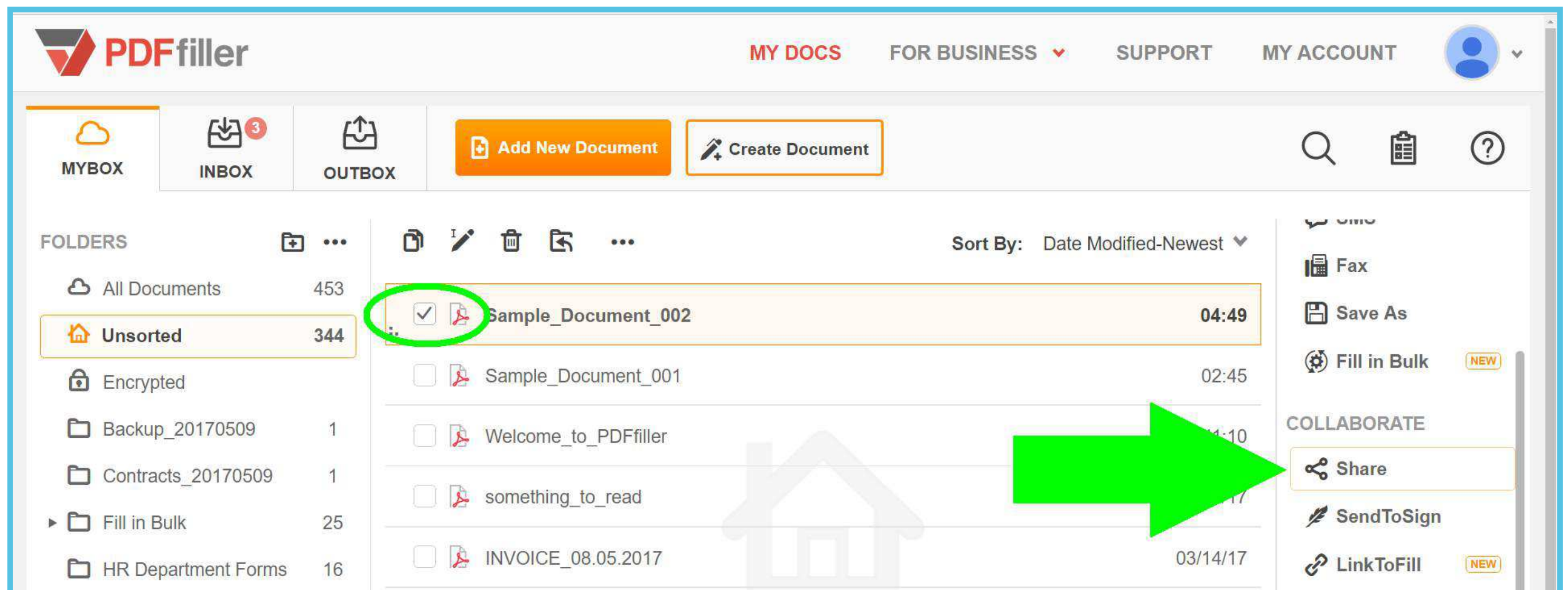
Congratulations, you have just connected our Slack App! Should you change your mind, you can always disconnect it, just click **Disconnect**.



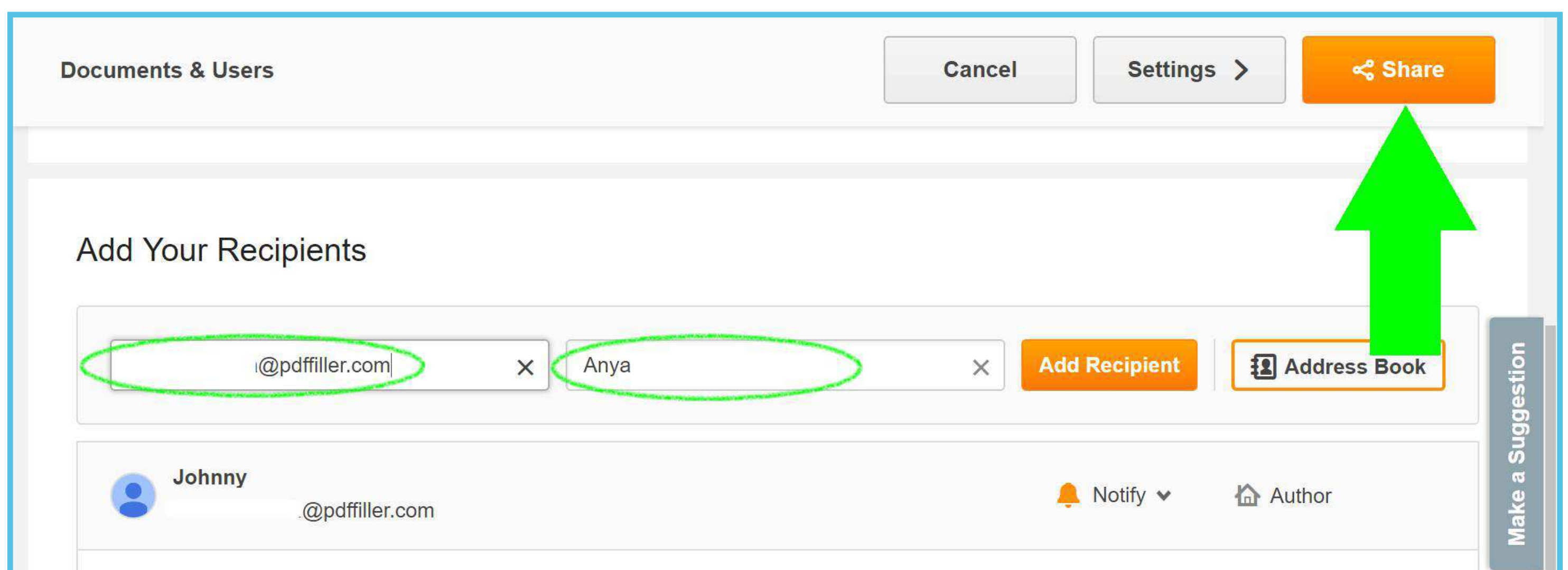
2. How the Slack App Works

2.1 Share

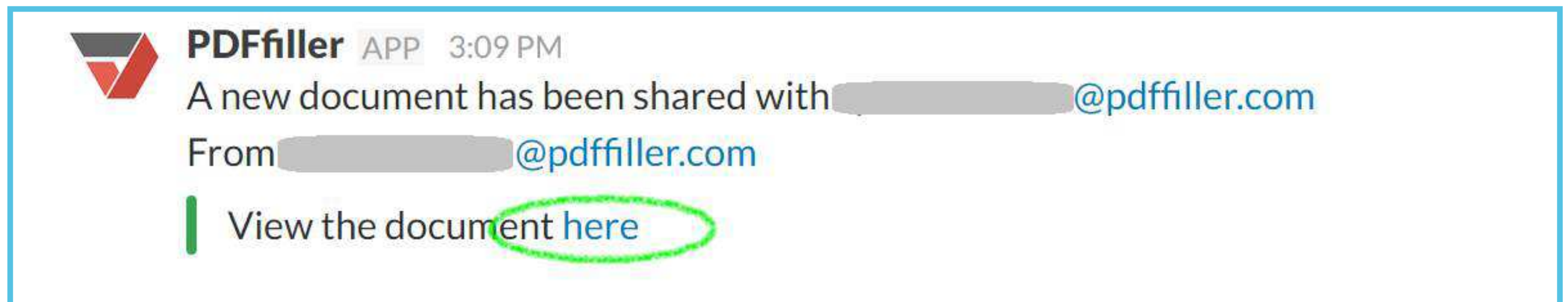
Select the document you would like to share in **MY DOCS**, then select **Share** in the right pane.



In the window that will open next, enter the names and email addresses of the recipients and click the **Share** button in the bottom right corner of the page.

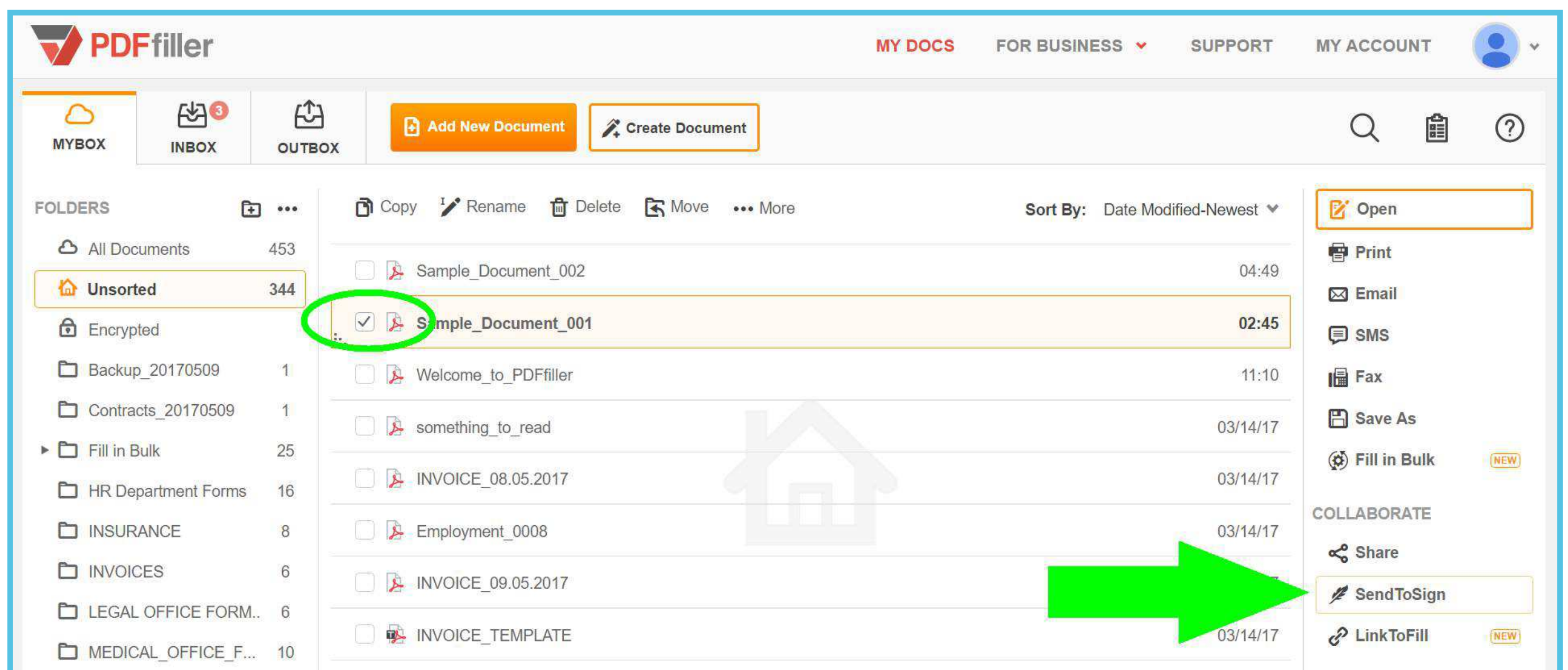


The recipients will get a message in Slack telling them that you have shared with them a document. The message contains a link that enables the recipients to open the document in the PDFfiller editor.



2.2. SendToSign

You can also request anyone to sign a document and immediately notify them via Slack of your request. In **MY DOCS**, select the document that requires signatures of other people, and click **SendToSign** on the right.




In the next window, enter the names and addresses of the recipients, select other settings and click the **SendToSign** button at the bottom of the page.

SendToSign Send your document out to be signed by anyone on any device. Get it back signed in seconds.

1. Choose how you want this document to be signed?

SendToEach :
Each recipient gets their own document to sign.
Send up to 20 unique copies of this document to be individually signed by each recipient. You will receive a confirmation after each copy is signed.

SendToGroup : Sign in Order ⓘ
Everyone signs one document.
Send a single copy of this document to be signed by up to 20 recipients, in any order or in a specific order. You will receive a confirmation email once the document has been signed by all recipients.



2. Add Your Recipients


Authenticate Signer ⓘ

Editing Permissions ⓘ
 Require a photo for signature authentication ⓘ

Request Additional Documents ⓘ


Message
Subject: Please sign this document with PDFfiller
Please sign and return the linked document with PDFfiller. If you have any questions, please contact me.

3. Modify Fillable Fields

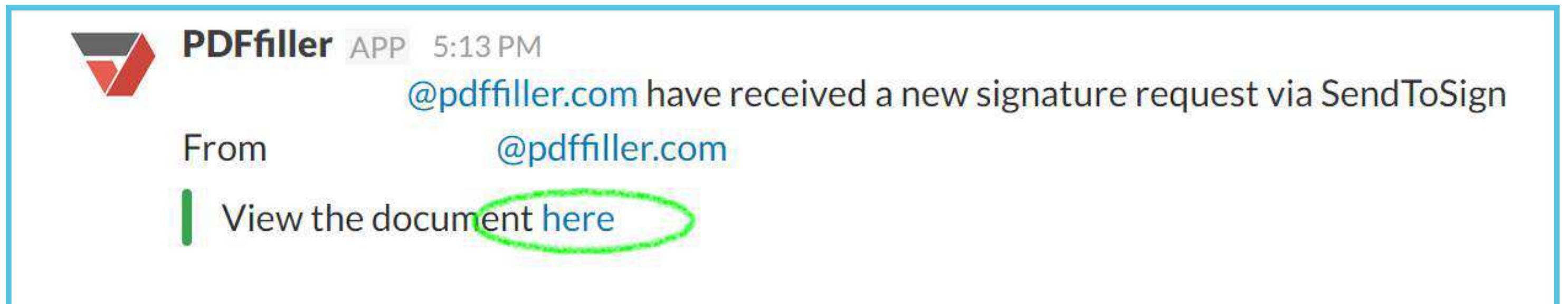
Your document  Sample_Document_001.pdf has fillable fields.
To modify, add or delete fillable fields click the button below. Once you modify the fields, we will return you to this screen to finish. Sending out the document for signature.

4. Document Security

Document ID ⓘ
 Generate document tracking ID Display tracking ID on a document



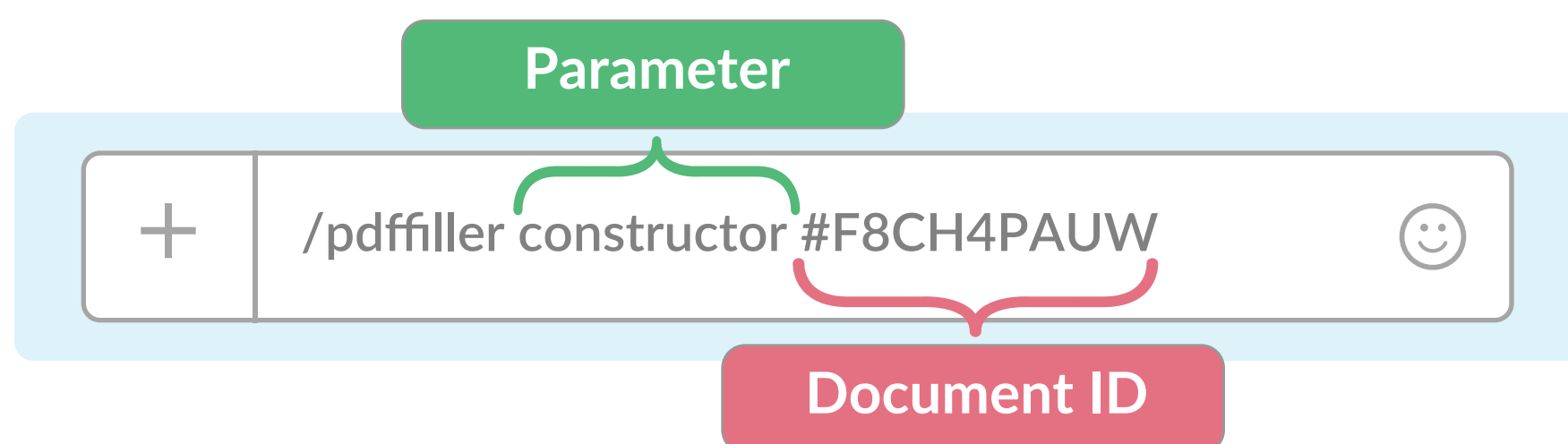
As a result, the recipients will receive a message via Slack telling them that you have requested their signatures. The message contains a link that enables the recipients to open and sign the document.



We truly hope that our integration with Slack will save you a lot of time and will make your work even more efficient.

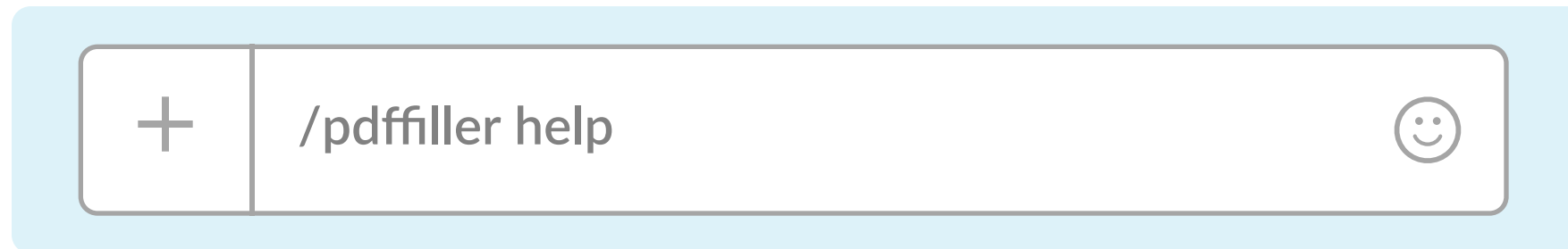
2.3. PDFfiller chat commands

You can use a PDFfiller bot to interact with PDF documents uploaded to Slack channels. Before we move forward, it's important that we discuss how chat command elements are structured. The diagram below displays basic command elements:

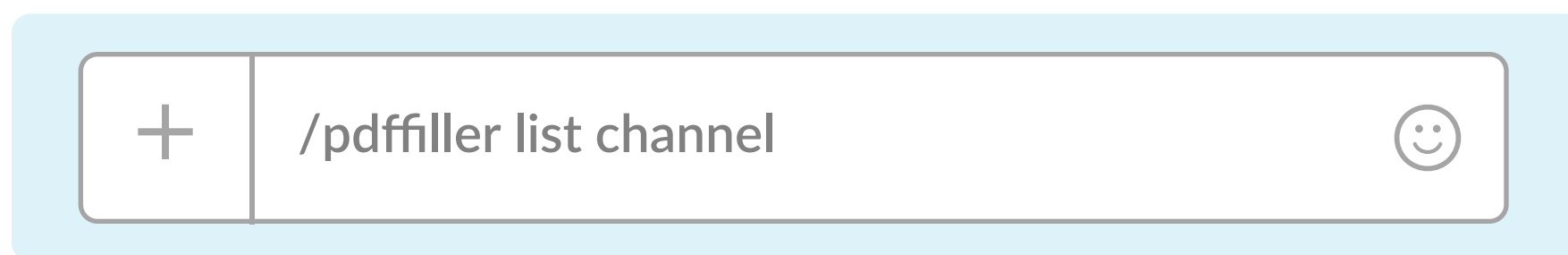
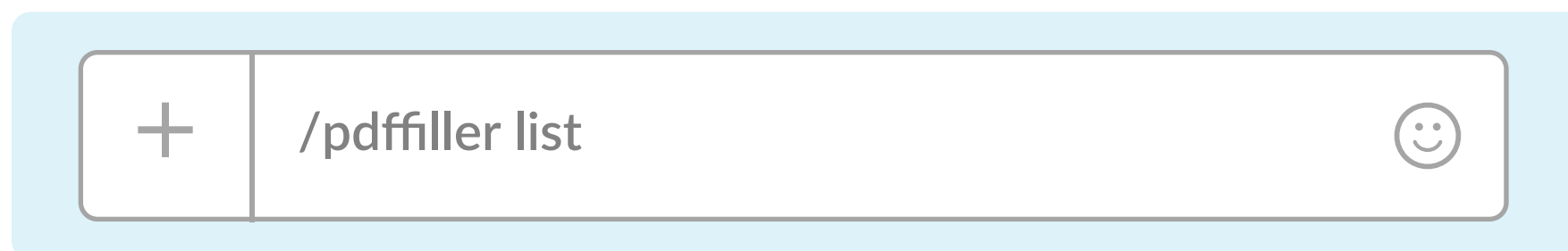


Parameters **[help]**, **[list]**, **[list channel]**, **[list all]** and **[history]** don't require a document ID.

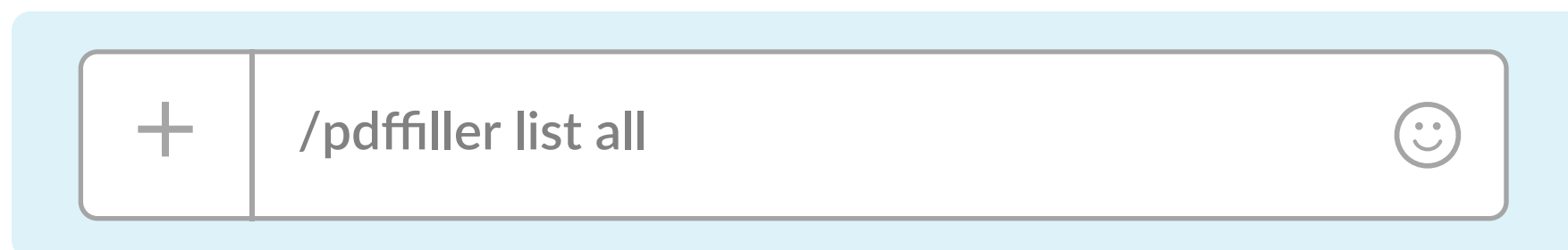
Use the **[help]** parameter to get hints for all possible parameters listed.



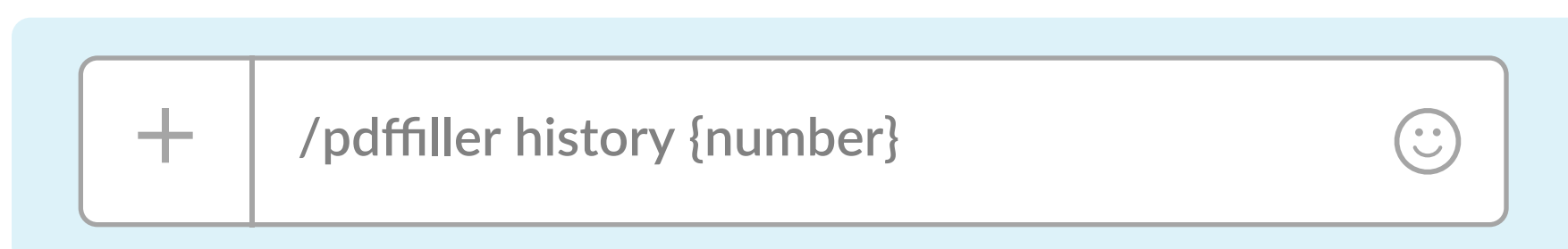
To retrieve a list of all PDF documents in a particular channel with their IDs, make use of either the **[list]** or **[list channel]** parameters.



If you need to retrieve ID's for all PDF documents uploaded to a Slack workspace, use the **[list all]** parameter.



Use the **[history]** parameter with a number after it to retrieve a list of your most recent documents last opened in PDFfiller. A number after the parameter limits the result of documents listed. Omitting a number after parameter will result in retrieving a single document.

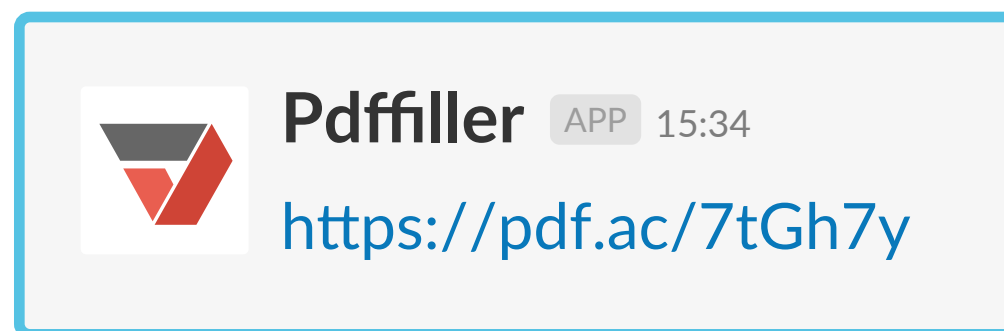


The Constructor and L2F parameters require a document ID to work properly.

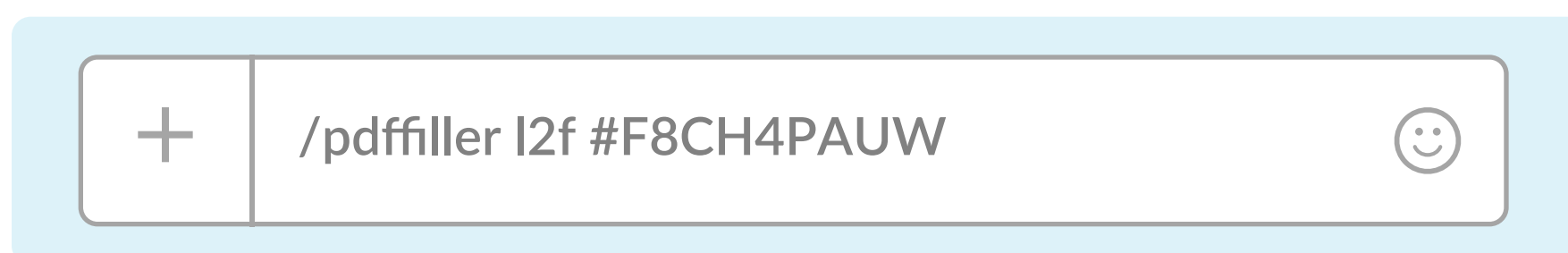
The [**Constructor**] parameter will give you a link for editing a document.



The link will appear in your PDFfiller channel and you can share it to collaborate on document editing.



The [**I2f**] parameter will generate a link for your fillable document.



This link will appear in your PDFfiller channel. Whenever someone uses the link to fill out a PDF, a completed document will appear in the same channel.

