



Informatica® Cloud Application Integration
October 2024

Synchronize Salesforce Incidents with ServiceNow Incidents based on Platform Events

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Preface

Use *Synchronize Salesforce Incidents with ServiceNow Incidents based on Platform Events Recipe Guide* to learn how to synchronize Salesforce incidents with ServiceNow incidents. This guide assumes that you have an understanding of the Salesforce connector and ServiceNow connector concepts.

CHAPTER 1

Introduction to Synchronize Salesforce Incidents with ServiceNow Incidents recipe

The Synchronize Salesforce Incidents with ServiceNow Incidents recipe is a platform event-based recipe.

When an incident is created or updated in Salesforce, a Salesforce platform event triggers the process. The process checks whether the user exists in ServiceNow. If the user does not exist, the process creates a user in ServiceNow. The process then searches for a matching incident in ServiceNow by description and creates or updates the incident based on the search results without manual intervention.

With this recipe, you can synchronize Salesforce incidents with ServiceNow incidents without any manual intervention.

Example

Consider that the customer support team in your organization uses Salesforce to manage and maintain customer service incidents. The IT team uses ServiceNow to manage and maintain incidents reported by customers, partners, and employees. Every time the customer support team creates or updates a customer incident, they communicate the relevant incident details manually to the IT team. The IT team then verifies whether the incident exists in their database. If the incident does not exist, the team creates an incident manually.

To improve the incident management and team collaboration, both teams need immediate access to critical customer data about product issues.

Prerequisites for configuring a Salesforce platform event

The Synchronize Salesforce Incidents with ServiceNow Incidents recipe uses Salesforce platform events. To configure a Salesforce platform event, the following prerequisites must be met:

- Create a Salesforce platform event in the Salesforce organization before setting up a Salesforce connection and real-time process in Application Integration to consume the Salesforce event. For more information about configuring a Salesforce platform event for the first time, see [“Configuring a Salesforce platform event to subscribe to Incident object change” on page 7](#).
- Install a Secure Agent on which you want to deploy the connections. For more information, see [Secure Agent installation in a local environment](#).

Configuring a Salesforce platform event to subscribe to Incident object change

Salesforce connections in Application Integration support the Salesforce Streaming API. You can configure an event source in a Salesforce connection to subscribe to Salesforce platform events and PushTopic queries. You can use the event source in a process to consume changes in real-time.

For more information about setting up Salesforce platform events, see the Informatica Knowledge Base article [000181147](#).

To set up the Salesforce platform event, perform the following steps:

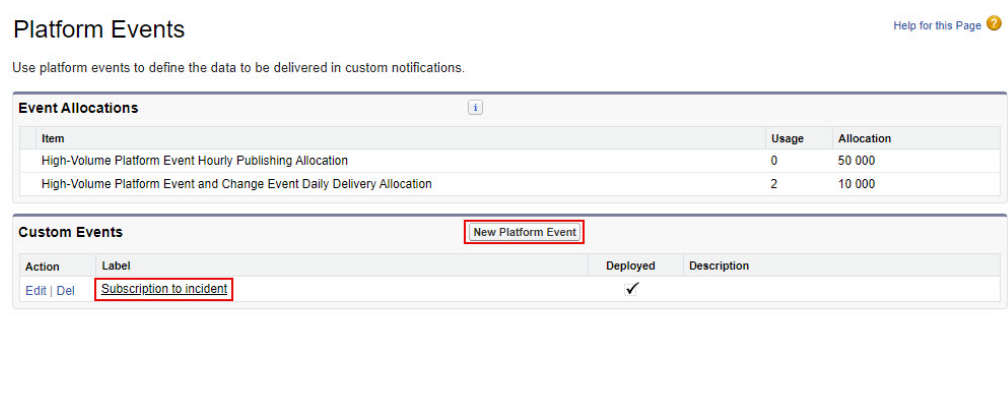
- Step 1: Create a platform event
- Step 2: Create a new connected app
- Step 3: Set object permissions
- Step 4: Create a trigger to generate an event

Create a platform event

To create a platform event in Salesforce, perform the following steps:

1. Log in to the Salesforce organization.
2. Go to **Setup > Develop > Platform Events**, and then click **New Platform Event**.

The following image shows the **New Platform Event** button and the platform event name on the **Platform Events** page:



3. In the **Platform Event Information** section, enter the details in the **Label**, **Plural Label**, and **Object Name** fields, and select **Publish Immediately** in the **Publish Behavior** field as shown in the following image:

New Platform Event

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Don't show this message again](#)

Platform Event Definition Edit Save Save & New Cancel

Platform Event Information

Label

Plural Label

Starts with vowel sound

The object name is used when referencing the event via the API.

Object Name

Description

Event Type

Publish Behavior

Deployment Status

In Development

Deployed

Save Save & New Cancel

4. Click **Save**.

The Salesforce platform event is created successfully. Note the **API Name** field value. You will need to enter it in the **Event Consumer** field while configuring the Salesforce connection.

5. Open the Salesforce platform event that you just created.

6. In the **Custom Field & Relationships** section, add custom fields named **Incident ID** and **Description** with the **Text** data type.

Note: You must create a custom field in Salesforce with the **Text** data type.

The following image shows the API name and the fields that you created in the Salesforce platform event:

Platform Event
Subscription to incident Help for this Page

Standard Fields (4) | Custom Fields & Relationships (2)

Platform Event Definition Detail Edit Delete

Singular Label Subscription to incident Description

Plural Label Subscription to incident Deployment Status Deployed

Object Name Subscription_to_incident

API Name Subscription_to_incident__e

Event Type High Volume

Publish Behavior Publish Immediately

Created By Anjali Tyzhordia 27.02.2024, 11:06 Modified By 18.03.2024, 18:40

Standard Fields

Action	Field Label	Field Name	Data Type	Controlling Field	Indexed
	CreatedBy	CreatedBy	Lookup(User)		
	CreatedDate	CreatedDate	Date/Time		
	Event UUID	EventJuid	Text(36)		
	Replay ID	ReplayId	External Lookup		

Custom Fields & Relationships New

Action	Field Label	API Name	Data Type	Indexed	Controlling Field	Modified By
Edit Del	Description	Description__c	Text(200)			28.02.2024, 18:09
Edit Del	Incidence ID	Incidence_ID__c	Text(100)			29.02.2024, 15:19

Deleted Fields (1)

Triggers New

No triggers defined

Subscriptions 1

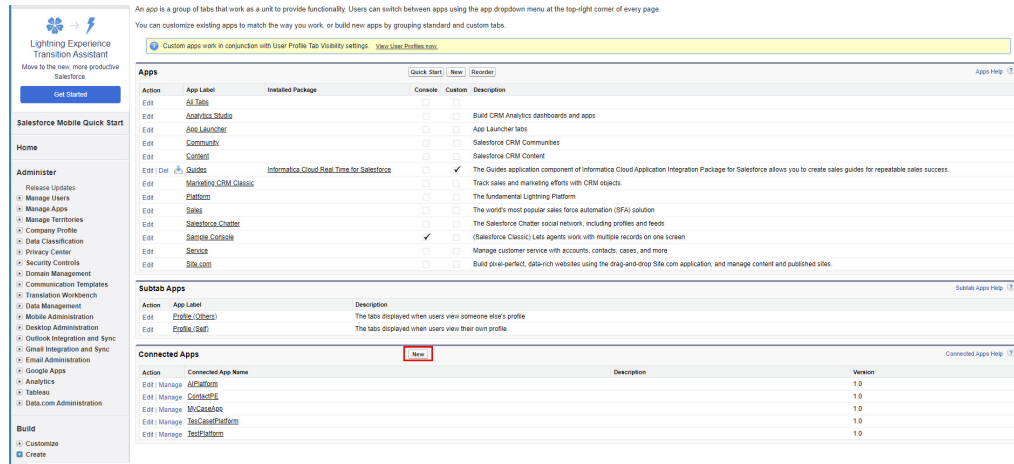
Subscriber	Last Processed Id	Last Published Id	State

Create a new connected app

In the connected app, you provide the necessary permissions and consume the platform event. From this connected app, you will get the consumer key and consumer secret that you will need while configuring the Salesforce connection.

1. Go to **Setup > Build > Create > Apps > Connected Apps**, and then click **New**.

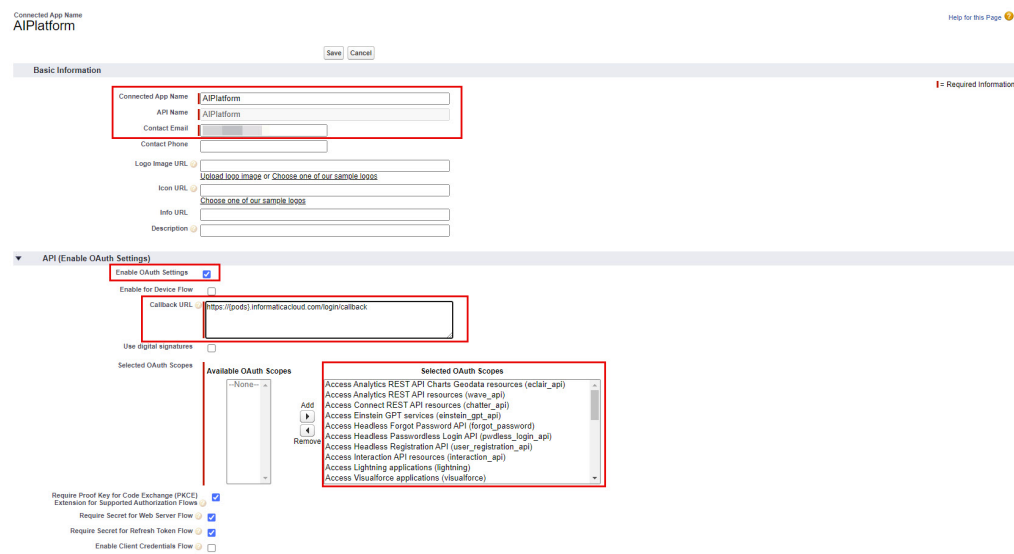
The following image shows the **New** button in the **Connected Apps** section on the **Apps** page:



2. Enter the details in the **Connected App Name**, **API Name**, and **Contact Email** fields.
3. Select the **Enable OAuth Settings** option.
4. In the **Callback URL** field, enter the callback URL as shown in the following format:
`https://<pod name>.informaticacloud.com/login/callback`
5. Provide the necessary access in the **Selected OAuth Scopes** field. If you are not sure about the access, select all the options from the **Available OAuth Scopes** section, and click **Add**.

The selected options are displayed in the **Selected OAuth Scopes** section.

The following image shows the **Connected App Name** page:



6. Click **Save**.

- Go to the **API (Enable OAuth Settings)** section and click **Manage Consumer Details** as shown in the following image:



The **Consumer Key** and **Consumer Secret** fields are displayed.

- Save the consumer key and consumer secret values for your future use.
- Click **Manage > Edit policies > IP Relaxation**.

The following image shows the **IP Relaxation** field in the **Connected App Edit** page:

Connected App Edit

Version 1
Description

Basic Information

Start URL:
Mobile Start URL:

OAuth Policies

Permitted Users: All users may self-authorize
Enable Single Logout:
IP Relaxation: Relax IP restrictions
Refresh Token Policy: Refresh token is valid until revoked
 Immediately expire refresh token
 Expire refresh token if not used for Day(s)
 Expire refresh token after Day(s)

Session Policies

Timeout Value: --None--
 High assurance session required

Custom Connected App Handler

Apex Plugin Class:
Run As:

User Provisioning Settings

Enable User Provisioning

Save Cancel

10. Select **Relax IP restrictions** in the **IP Relaxation** field.
11. Click **Save**.

Set object permissions

To set up the platform event with the necessary permissions, perform the following steps:

1. Go to **Setup > Manage Users > Profiles**, and then click **Edit** next to the profile name, or if you are not sure, click **Edit** next to **All Profiles**.

The following image shows the list of profiles on the **Profiles** page:

Profiles

All Profiles Edit Delete Create New View

Action	Profile Name	User License	Custom	Subscription to Incident R...	Subscription to Incident: Cr...	Subscription to Incident: Edit	Subscription to Incident: D...	Subscription to Incident: V...	Subscription to Incident: M...
<input type="checkbox"/>	Analytics Cloud Integration	Analytics Cloud Integration	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Analytics Cloud Security User	Analytics Cloud Integration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Authenticated Website	Authenticated Website	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Authenticated Website	Authenticated Website	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	AuthN/Session/Polar Dev...	External Apps Login	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Chatter External User	Chatter External	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Chatter Free User	Chatter Free	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Chatter Moderator User	Chatter Free	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Contract Manager	Salesforce	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Cross Org Data Proxy User	XOrg Proxy User	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Custom_Marketing_Profile	Salesforce	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Custom_Sales_Profile	Salesforce	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Custom_Support_Profile	Salesforce	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Customer_Community_Logi...	Customer Community Login	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Customer_Community_Plus...	Customer Community Plus	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Customer_Community_Plus...	Customer Community Plus	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Customer_Community_User...	Customer Community	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Customer_Portal_Manage...	Customer Portal Manage...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Customer_Portal_Manage...	Customer Portal Manage...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	External_Apps_Login_User	External Apps Login	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2. In the **Select Columns to Display** section, select **Object Permissions** in the **Search** field.
3. In the **Available Settings** section, select the platform event that you just created.
4. Add all the required permissions.

The following image shows the settings in the **Select Columns to Display** section:

Profiles
Edit View

Save Save As Delete Cancel

Step 1. Enter View Name

View Name: All Profiles
Created By: 23.02.2024, 08:38

Step 2. Specify Filter Criteria

Setting Operator Value [Clear All Rows](#)

Operator: equals

[Add Row](#)

Examples
Modify All Data equals False
Contact: Modify All equals True

Step 3. Select Columns to Display

Specify the columns to show in the list view. To set the columns, you can add profile details, user permissions, and object-level permissions.

Search: Object Permissions Subscription Find

Available Settings	Selected Settings
Subscription to Case: Read	Profile Name
Subscription to Case: Create	User License
Subscription to Case: Edit	Custom
Subscription to Case: Delete	
Subscription to Case: View All	
Subscription to Case: Modify All	
Subscription to incident: Read	
Subscription to incident: Create	
Subscription to incident: Edit	
Subscription to incident: Delete	
Subscription to incident: View All	
Subscription to incident: Modify All	

Add Remove

Top Up Down Bottom

Save Save As Delete Cancel

5. Click **Save**.

You can use this platform event in the Salesforce connection in Application Integration, and the Salesforce connection can be used in a real-time process to consume Salesforce events.

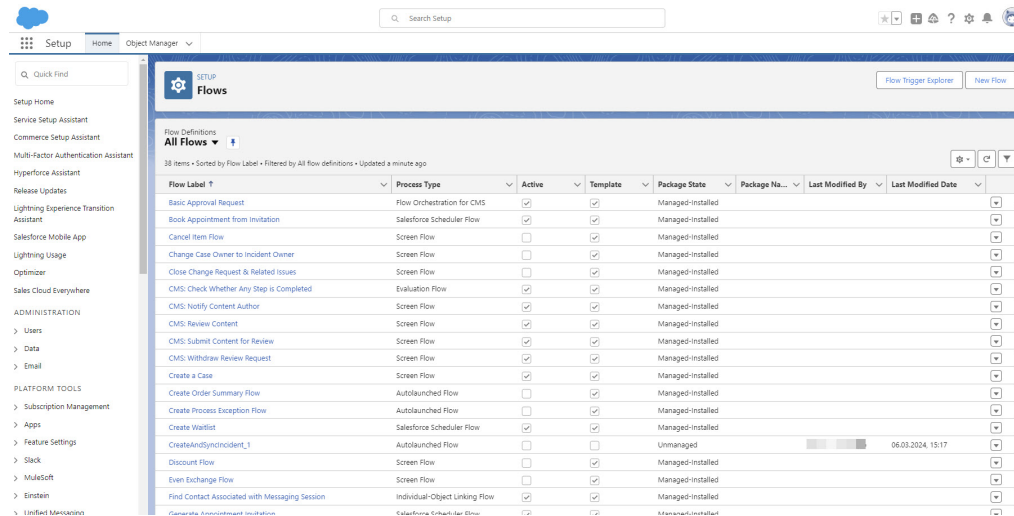
Create a trigger to generate an event

To create a trigger to generate an event, perform the following steps:

Note: Informatica recommends that you use the Salesforce Lightning Experience as Salesforce plans to retire Process Builder and recommends building automation in Flow Builder.

1. Go to **Setup > Process Automation > Flows**, and then click **New Flow**.

The following image shows the list of flows on the **Flows** page:

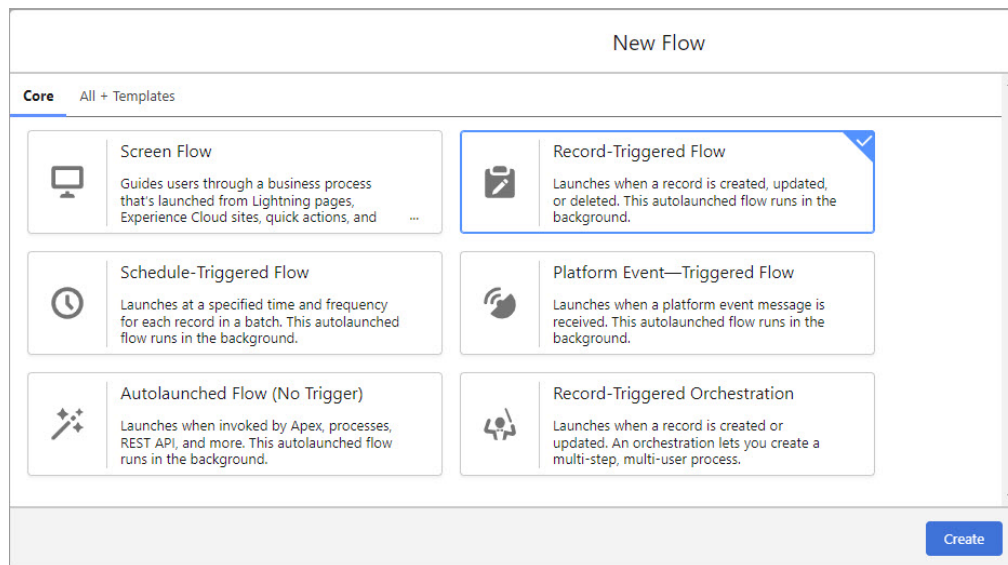


The screenshot shows the Salesforce Setup page for Flows. The page title is "Flows" and it displays a list of 38 flow definitions. The table columns are: Flow Label, Process Type, Active, Template, Package State, Package No., Last Modified By, and Last Modified Date. The flows are sorted by Flow Label. The first few flows are:

Flow Label	Process Type	Active	Template	Package State	Package No.	Last Modified By	Last Modified Date
Basic Approval Request	Flow Orchestration for CMS	✓	✓	Managed-Installed			
Book Appointment from Invitation	Salesforce Scheduler Flow	✓	✓	Managed-Installed			
Cancel Item Flow	Screen Flow	✓	✓	Managed-Installed			
Change Case Owner to Incident Owner	Screen Flow	✓	✓	Managed-Installed			
Close Change Request & Related Issues	Screen Flow	✓	✓	Managed-Installed			
CMS: Check Whether Any Step is Completed	Evaluation Flow	✓	✓	Managed-Installed			
CMS: Notify Content Author	Screen Flow	✓	✓	Managed-Installed			
CMS: Review Content	Screen Flow	✓	✓	Managed-Installed			
CMS: Submit Content for Review	Screen Flow	✓	✓	Managed-Installed			
CMS: Withdraw Review Request	Screen Flow	✓	✓	Managed-Installed			
Create a Case	Screen Flow	✓	✓	Managed-Installed			
Create Order Summary Flow	Autolaunched Flow	✓	✓	Managed-Installed			
Create Process Exception Flow	Autolaunched Flow	✓	✓	Managed-Installed			
Create Waitlist	Salesforce Scheduler Flow	✓	✓	Managed-Installed			
CreateAndSyncIncident_1	Autolaunched Flow	✓	✓	Unmanaged			06.03.2024, 15:17
Discount Flow	Screen Flow	✓	✓	Managed-Installed			
Even Exchange Flow	Screen Flow	✓	✓	Managed-Installed			
Find Contact Associated with Messaging Session	Individual-Object Linking Flow	✓	✓	Managed-Installed			

2. Select **Record-Triggered Flow**.

The following image shows the **Record-Triggered Flow** on the **New Flow** dialog box:



3. Click **Create**.
4. In the **Object** field, select the object as **Incident**.
5. In the **Configure Trigger** section, select the **A record is created or updated** option.

The following image shows the **Flow Builder** page:

Select Object
Select the object whose records trigger the flow when they're created, updated, or deleted.
* Object: Incident

Configure Trigger
* Trigger the Flow When:
 A record is created
 A record is updated
 A record is created or updated
 A record is deleted

Set Entry Conditions
Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.
If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.
Condition Requirements: None

*** Optimize the Flow for:**

- Fast Field Updates**
Update fields on the record that triggers the flow to run. This high-performance flow runs *before* the record is saved to the database.
- Actions and Related Records**
Update any record and perform actions, like send an email. This more flexible flow runs *after* the record is saved to the database.

Include a Run Asynchronously path to access an external system after the original transaction for the triggering record is successfully committed

6. Add a new element in the flow builder space, **Data > Create Records**.
7. Enter values in the **Label** and **API Name** fields.
8. In the **How Many Records to Create** field, select **One**.
9. In the **How to Set the Record Fields** field, select **Use separate resources, and literal values**.
10. In the **Create a Record of This Object** section, enter the name of the Salesforce platform event you created in the **Object** field.
11. In the **Set Field Values for the Subscription to incident** field, map the fields in the Salesforce platform event using the **{!\$Record}** in the **Value** field.

New Create Records

* Label: Create event * API Name: Create_event

Description:

How Many Records to Create
 One
 Multiple

How to Set the Record Fields
 Use all values from a record
 Use separate resources, and literal values

Create a Record of This Object
 * Object: Subscription to incident

Set Field Values for the Subscription to incident

Field	Value
Description_c	{!\$Record} > Description
Incidence_ID_c	{!\$Record} > Incident ID

Manually assign variables

12. Click **Save** and **Activate**.

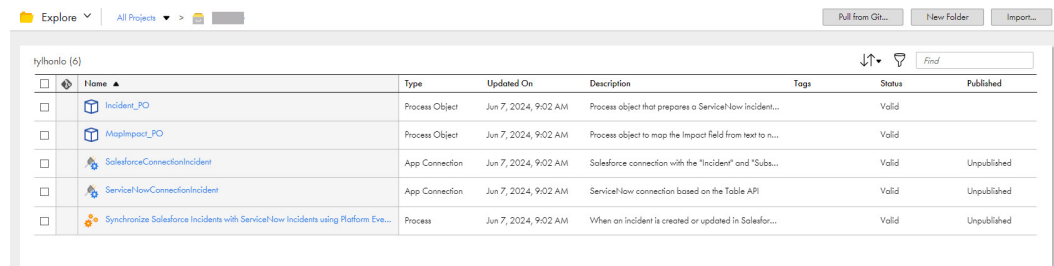
After completing these steps, you have the event consumer, consumer key, and consumer secret values for setting up the Salesforce connection in Application Integration.

CHAPTER 2

Recipe contents

The recipe contains multiple assets such as process objects, app connections, and a process.

The following image shows the assets that the Synchronize Salesforce Incidents with ServiceNow Incidents recipe package contains:



Synchronize Salesforce Incidents with ServiceNow Incidents recipe assets

The following table lists the assets that the Synchronize Salesforce Incidents with ServiceNow Incidents recipe package contains:

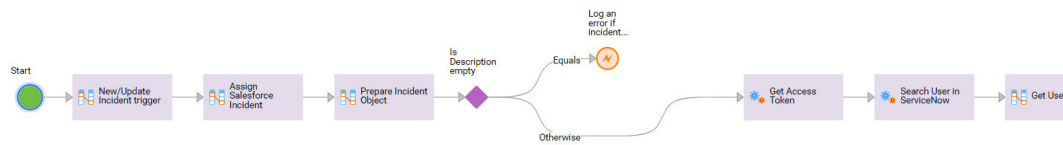
Asset Name	Asset Type	Description
Incident_PO	Process object	Prepares a ServiceNow incident from the Salesforce incident.
MapImpact_PO	Process object	Maps the Impact field from the text data type to the number data type in ServiceNow.
SalesforceConnectionIncident	App connection	Connects to the Salesforce platform event with the Incident and Subscription_to_incident__e object filters.
ServiceNowConnectionIncident	App connection	Connects to ServiceNow based on the Table API.
Synchronize Salesforce Incidents with ServiceNow Incidents using Platform Events	Process	When an incident is created or updated in Salesforce, perform steps to synchronize data from Salesforce incidents to ServiceNow incidents.

Synchronize Salesforce Incidents with ServiceNow Incidents using Platform Events process

When an incident is created or updated in Salesforce, a Salesforce platform event triggers the process.

The process checks whether the user exists in ServiceNow. If the user does not exist, the process creates a user in ServiceNow. The process then searches for a matching incident in ServiceNow by description and creates or updates the incident based on the search results.

The following image shows the steps that the Synchronize Salesforce Incidents with ServiceNow Incidents using Platform Events process contains:



The following table lists the steps that the Synchronize Salesforce Incidents with ServiceNow Incidents using Platform Events process contains:

Step Name	Description
Start	The event searches for the Salesforce platform event name, that is, the Salesforce connection incident.
New/Update Incident trigger	When the incident is created the event in Salesforce trigger the process execution.
Assign Salesforce Incident	Assigns the Salesforce incident to a temporary incident ID.
Prepare Incident Object	Parses the event and assigns values.
Is Description empty	Verifies whether the incident description is empty. If it is empty, an error occurs, and the process ends. Otherwise, the process continues to the next step.
Get Access Token	Gets an access token to authorize all the connection requests.
Search User in ServiceNow	Searches for the user if it is specified in the Salesforce incident.
Get User ID	Saves the user ID.
Is User ID missing in ServiceNow	If the user ID is missing in ServiceNow, creates a user in ServiceNow and gets the user ID. Otherwise, the process continues to the next step.
Search Incident in ServiceNow	Searches for the incident by description. If the incident description is modified in Salesforce, a new incident will be created in ServiceNow.
Get Incident ID	Gets the incident ID.
Is Incident ID missing in ServiceNow	Verifies whether the incident ID is missing in ServiceNow. If the incident ID exists, updates the incident. Otherwise, creates a new incident.
End	Ends the process.

CHAPTER 3

Using the Synchronize Salesforce Incidents with ServiceNow Incidents recipe

To use the Synchronize Salesforce Incidents with ServiceNow Incidents recipe, you must perform the following steps manually:

Step 1: Copy and access the recipe content

Step 2: Configure and publish the Salesforce connection

Step 3: Configure and publish the ServiceNow connection

Step 4: Configure and publish the process

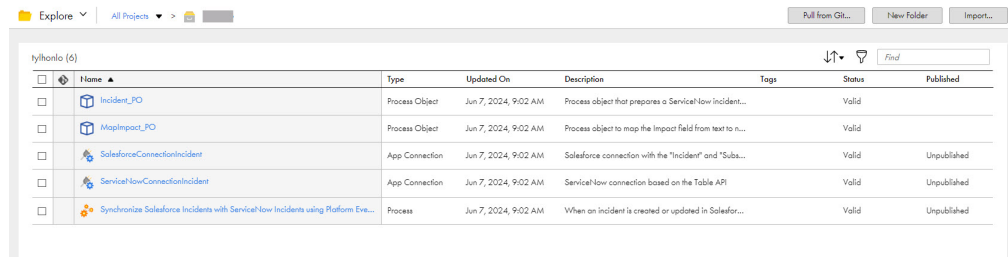
Step 5: Test data synchronization from Salesforce incidents to ServiceNow incidents

Copying and accessing the recipe content

To copy and access the recipe content, perform the following steps:

1. Open the **Synchronize Salesforce Incidents with ServiceNow Incidents based on Platform Events** recipe and click **Use**.
2. Select the location where you want to copy the recipe, and then click **Continue**.
3. In the **Copying the recipe** dialog box, click **OK**.
It might take some time for the recipe to get copied. You will receive a notification when the recipe is ready for use.
4. After the recipe is copied, click **Explore** to access the recipe content.

5. Navigate to the project or folder where you copied the recipe or enter the recipe name in the **Find** box. All the assets in the recipe are displayed as shown in the following image:



The screenshot shows a project explorer interface with a table of assets. The table has columns for checkboxes, icons, names, types, updated on dates, descriptions, tags, status, and published status. The assets listed are Incident_PO, MapImpact_PO, SalesforceConnectionIncident, ServiceNowConnectionIncident, and Synchronize Salesforce Incidents with ServiceNow Incidents using Platform Eve...

		Type	Updated On	Description	Tags	Status	Published
<input type="checkbox"/>	📁	Incident_PO	Jun 7, 2024, 9:02 AM	Process object that prepares a ServiceNow incident...		Valid	
<input type="checkbox"/>	📁	MapImpact_PO	Jun 7, 2024, 9:02 AM	Process object to map the Impact field from text to n...		Valid	
<input type="checkbox"/>	📁	SalesforceConnectionIncident	Jun 7, 2024, 9:02 AM	Salesforce connection with the "Incident" and "Subs...		Valid	Unpublished
<input type="checkbox"/>	📁	ServiceNowConnectionIncident	Jun 7, 2024, 9:02 AM	ServiceNow connection based on the Table API		Valid	Unpublished
<input type="checkbox"/>	📁	Synchronize Salesforce Incidents with ServiceNow Incidents using Platform Eve...	Jun 7, 2024, 9:02 AM	When an incident is created or updated in Salefor...		Valid	Unpublished

Configuring and publishing the Salesforce connection

To create a Salesforce connection that supports a Salesforce platform event, perform the following steps:

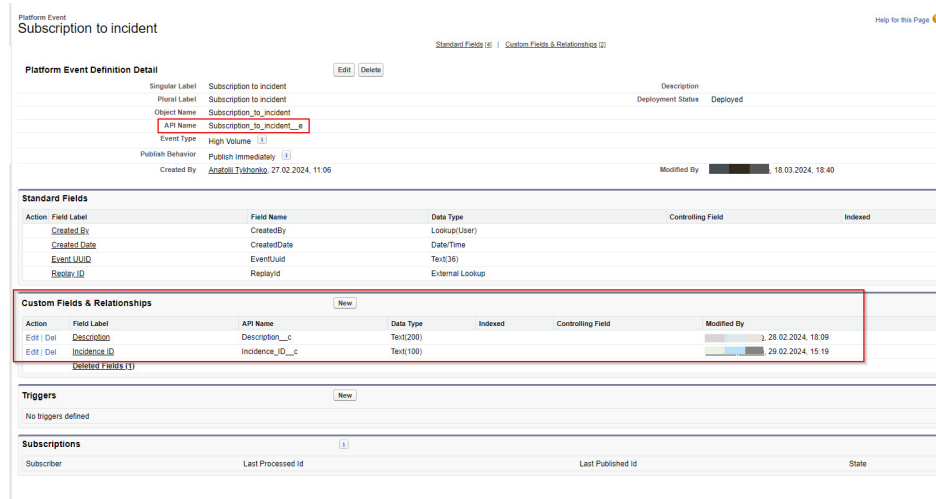
1. Open the **SalesforceConnectionIncident** connection.
2. In the **Type** field, select **Salesforce**.
3. In the **Run On** field, select the Secure Agent.
4. In the **Authentication Type** field, select **Password** or **OAuth** as required.

Based on the authentication type selected, perform one of the following steps:

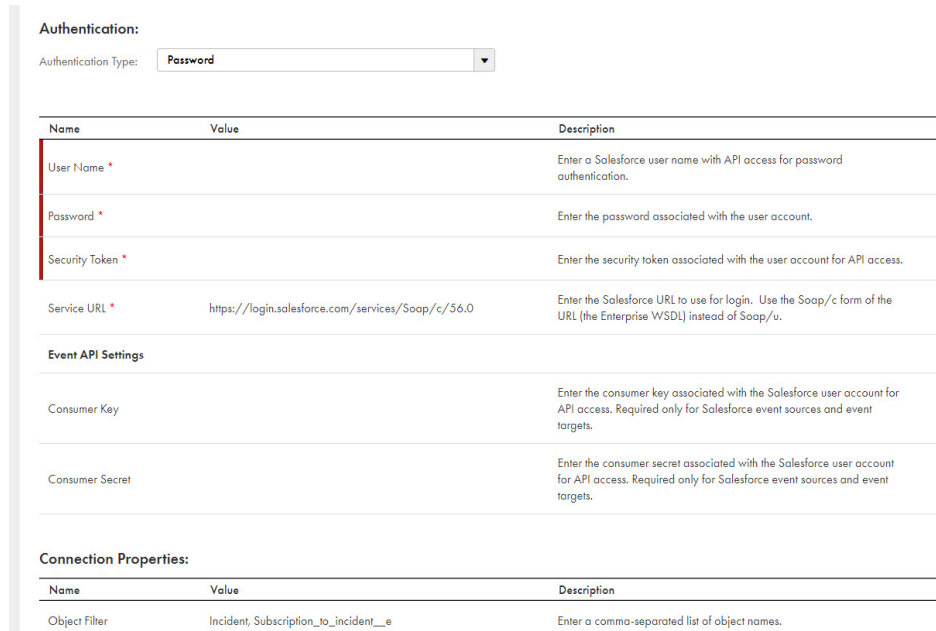
- For **Password** authentication:
 1. Enter values for the following properties:
 - User Name: Salesforce developer account user name.
 - Password: Salesforce developer account password.
 - Security Token: Salesforce security token.
 2. In the **Event API Settings** section, enter values in the **Consumer Key** and **Customer Secret** fields. For information about generating the **Consumer Key** and **Customer Secret** values, see ["Create a new connected app" on page 9](#).

- In the **Connection Properties** section, in the **Object Filter** field, enter the API name of the Salesforce platform event prefixed with **Incident**. For example, **Incident,Subscription_to_incident__e**.

The following image shows the API name of the Salesforce platform event:



The following image shows the **SalesforceConnectionIncident** connection detail page with the authentication type set to **Password**:



- For **OAuth** authentication, enter values for the following properties:
 - Authentication URL: Endpoint used to make OAuth authorization requests to Salesforce.
 - Token Request URL: Endpoint used to make OAuth token requests to Salesforce.
 - Session Duration: Number of minutes after which the OAuth token expires.
 - Authorize access: Click **Authorize** > enter Salesforce developer account credentials > click **Allow**.

The OAuth authentication process starts. You can check the current authorization status in the **Authorization Status** property.

The following image shows the **SalesforceConnectionIncident** connection detail page with the authentication type set to **OAuth**:

The screenshot displays the configuration page for a Salesforce connection. At the top, under the 'Authentication:' section, the 'Authentication Type' is set to 'OAuth'. Below this is a table with three columns: 'Name', 'Value', and 'Description'. The table contains the following rows:

Name	Value	Description
Authorization URL *	https://login.salesforce.com/services/oauth2/authorize	Enter the Salesforce OAuth authorization URL. Default value for production is https://login.salesforce.com/services/oauth2/authorize. For Sandbox, use https://test.salesforce.com/services/oauth2/authorize.
Token Request URL *	https://login.salesforce.com/services/oauth2/token	Enter the OAuth token request URL. For production, use https://login.salesforce.com/services/oauth2/token. For sandbox, use https://test.salesforce.com/services/oauth2/token.
Session Duration	60	Enter the number of minutes to wait before refreshing the session. Default is 60 minutes.
Authorization Status	Not yet authorized.	Indicates the current status and the last time that authorization was completed
Authorize Access	<input type="button" value="Authorize"/>	Click to initiate the authorization workflow using OAuth.

Below the table is the 'Connection Properties:' section, which contains another table with three columns: 'Name', 'Value', and 'Description'.

Name	Value	Description
Object Filter	Incident, Subscription_to_incident__e	Enter a comma-separated list of object names.

5. On the **Event Sources** tab, enter the API name of the Salesforce platform event prefixed with **/event/** in the **Event Consumer** field. For example, **/event/Subscription_to_incident__e**.

When the Salesforce platform event is called, the event refers to the value specified in this field.

Note: Ensure that the value in the **Event Consumer** field is the same as the event consumer you created for the platform event in the Salesforce organization.

6. Save and publish the connection.

Configuring and publishing the ServiceNow connection

To configure and publish a ServiceNow connection, perform the following steps:

1. Open the **ServiceNowConnectionIncident** connection.
2. In the **Type** field, select **ServiceNow**.
3. In the **Run On** field, select **Cloud Server or any Secure Agent**.

- In the **Connection Properties** section, enter values for the following properties:

Property	Description
Client ID	ServiceNow client ID to generate a valid access and refresh token. Enter the client ID that you generated under System OAuth > Application Registry in ServiceNow.
Client Secret	ServiceNow client secret that you generated under System OAuth > Application Registry in ServiceNow.
User Name	ServiceNow user name with the security_admin role to generate client credentials in the ServiceNow instance.
Password	Password associated with the ServiceNow user account.
Service URL	URL to access the ServiceNow instance.
Grant type	Grant type that the ServiceNow instance uses to get an access token for third-party clients authorization. Enter the value as password .

- Save and publish the connection.

Configuring and publishing the process

- Open the **Synchronize Salesforce Incidents with ServiceNow Incidents using Platform Events** process.
- On the **Start** tab of the Start step, select the Secure Agent in the **Run On** field.
- Optionally, you can change the tracing level from **Verbose** to **None** on the **Advanced** tab.
- Save and publish the process.

Test data synchronization from Salesforce incidents to ServiceNow incidents

After you publish the process, whenever a Salesforce incident is created or updated, the Salesforce platform event triggers the process, and the details are synchronized with the ServiceNow incident without manual intervention.

The following table shows the fields that are synchronized between the Salesforce incident and the ServiceNow incident:

Salesforce - Incident	ServiceNow - Incident
Number	Number
Incident Owner	Caller

Salesforce - Incident	ServiceNow - Incident
Subject	Short Description
Description	Description
Urgency	Urgency
Impact	Impact
Created Date	Created Date
Last Modify Date	Last Modify Date
Owner	Assigned To

Rules and guidelines for using the Synchronize Salesforce Incidents to ServiceNow Incidents recipe

Consider the following rules and guidelines when working with the Synchronize Salesforce Incidents with ServiceNow Incidents recipe:

- You must use the same Secure Agent to configure the service connector, app connections, and process that are packaged in the recipe.
- You must first configure the connections in the recipe and publish them before opening or updating the process. Otherwise, the process will contain empty fields from the connections and will become invalid.
- Informatica recommends that you use the same names configured for the assets in the recipe. If you use the same asset names, you can publish all the assets and synchronize the data from Salesforce incidents with ServiceNow incidents without any issue. However, if you change the names, you must ensure that you update the names in the related fields in other assets.
For example, if you change the platform event name in Salesforce from **Subscription_to_incident** to a different name, you must use the same name in the **Event Consumer** field in the SalesforceConnectionIncident connection, and in the event source name in the Start step of the process.
- If the tenant already contains connections with the same name as the connections added from the package, the process in the recipe becomes invalid. This is because the newly added connection name contains the suffix -2. For example, <connection_name>-2.
In this case, you must manually reselect the connections with the new name and the event values in the next steps of the process wherever applicable.