Informatica® Cloud Application Integration
July 2024

Synchronize Dynamics 365 Cases with ServiceNow Incidents

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Preface

Use *Synchronize Dynamics 365 Cases with ServiceNow Incidents* to learn how to synchronize Dynamics 365 cases with ServiceNow incidents. The recipe is based on REST and SOAP APIs and you use an HTTP request to call the process. This guide assumes that you have an understanding of the Dynamics 365 connector and ServiceNow connector concepts.

CHAPTER 1

Synchronize Dynamics 365 Cases with ServiceNow Incidents recipe overview

The Synchronize Dynamics 365 Cases with ServiceNow Incidents recipe is a REST and SOAP-based API recipe.

You can run the process to synchronize Dynamics 365 cases with ServiceNow incidents. The process is called by an HTTP request with email as the incoming parameter and searches for all the cases created or updated during the previous day in Dynamics 365. The process searches for a matching incident in ServiceNow based on the short description and case title. If the incident does not exist, the process searches for the case contact by email in Dynamics 365 with the email in ServiceNow and creates the incident based on the contact details from Dynamics 365 without manual intervention.

After the process is initiated, the user receives a notification that the process is running in the background. After the process runs, the user receives an email notification with the number of successful synchronizations and a list of case numbers that failed to synchronize.

Example

Consider that the sales team in your organization uses Microsoft Dynamics 365 to create or update cases for new customer accounts. The support team uses ServiceNow to manage and maintain incidents reported by customers, partners, and employees. Every time the sales team creates or updates a customer case and the customer account is eligible for support, they communicate the relevant case details manually to the customer support team. The support team then verifies whether the case exists as an incident in their database. If the incident does not exist, the team creates an incident manually.

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

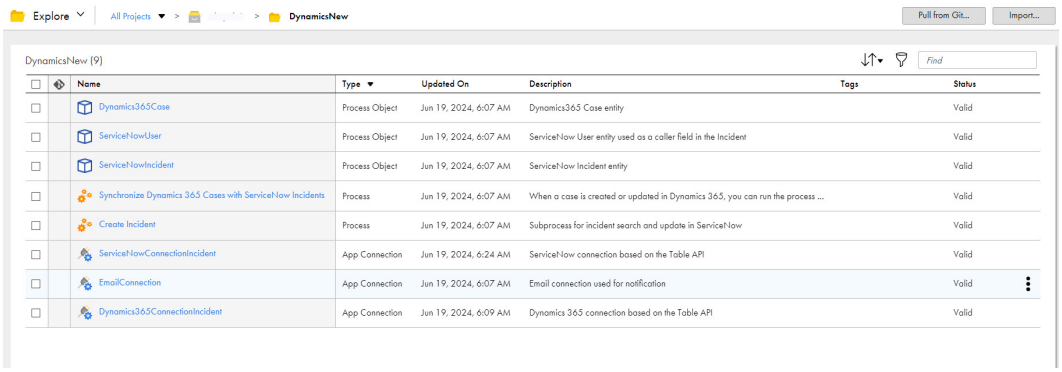
With this recipe, when the support team invokes the process, all the cases that were created or updated during the previous day in Dynamics 365 get synchronized with ServiceNow incidents.

CHAPTER 2

Synchronize Dynamics 365 Cases with ServiceNow Incidents contents

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

The following image shows the assets that the Synchronize Dynamics 365 Cases with ServiceNow Incidents recipe package contains:



Synchronize Dynamics 365 Cases with ServiceNow Incidents recipe assets

The following table lists the assets that the Synchronize Dynamics 365 Cases with ServiceNow Incidents recipe package contains:

Asset Name	Asset Type	Description
Dynamics365Case	Process object	Dynamics 365 case entity.
ServiceNowIncident	Process object	ServiceNow incident entity.
ServiceNowUser	Process object	ServiceNow user entity that is used as a caller field in the incident.

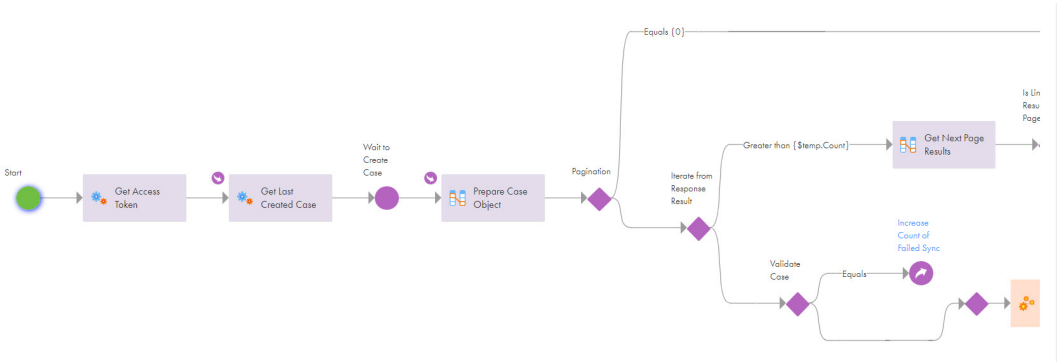
Asset Name	Asset Type	Description
Dynamic365ConnectionIncident	App connection	Connects to Dynamics 365 based on the Table API. The Dynamics 365 connector works only with the Dynamics 365 API 9.2 version.
EmailConnection	App connection	Email connection that is used to send email notifications.
ServiceNowConnectionIncident	App connection	Connects to ServiceNow based on the Table API.
Create Incident	Process	Subprocess to search incidents and update them in ServiceNow.
Synchronize Dynamics 365 Cases with ServiceNow Incidents	Process	The REST and SOAP based API process that synchronizes data from the cases that were created or updated during the previous day in Dynamics 365 with the ServiceNow incidents.

Synchronize Dynamics 365 Cases with ServiceNow Incidents process

You can run the process to synchronize the cases created or updated during the previous day in Dynamics 365 with ServiceNow incidents.

The process is called by an HTTP request with email as the incoming parameter and searches for all the cases that were created or updated during the previous day in Dynamics 365. The process searches for a matching incident in ServiceNow based on the short description and case title. If the incident does not exist, the process searches for the case contact by email in Dynamics 365 with the email in ServiceNow and creates the incident based on the contact details from Dynamics 365 without manual intervention.

The following image shows the steps that the Synchronize Dynamics 365 Cases with ServiceNow Incidents process contains:



The following table lists the steps that the Synchronize Dynamics 365 Cases with ServiceNow Incidents process contains:

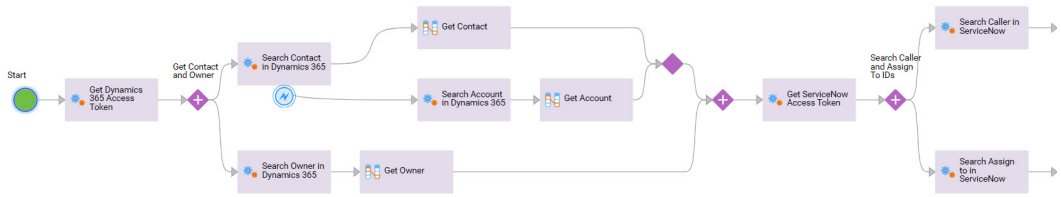
Step Name	Description
Start	The request searches for the email address to which the process execution result needs to be sent.
Get Access Token	Gets an access token to authorize all the connection requests.
Get Last Created Case	Gets all the cases that were created or updated from the previous day. You can also modify the day from when you want to synchronize the data. For example, if you want to synchronize the cases created or updated today in Dynamics 365, you can update the **filter** field value from `Microsoft.Dynamics.CRM.Yesterday(PropertyName='modifiedon')` to `Microsoft.Dynamics.CRM.Today(PropertyName='modifiedon')` on the **Input Fields** tab. Similarly, you can update the value to `LastWeek`, `LastMonth`, and so on. to synchronize the cases that were created or updated during that period.
Wait to Create Case	When you invoke the process, a message appears to notify the user that the background job has started.
Prepare Case Object	Parses the cases and assigns values.
Pagination	The process iterates the response results for all cases. The process contains a pagination of search results for cases with a limit of 100 results per page. If the number of records is greater than the temporary count value, that is, 100 records per page, the process links the results to the next page. If the number of records does not cross the temporary count value, the process starts validating the cases. The process performs the steps configured in the Create Incident process and increases the count of successful and failed synchronizations based on the synchronization results. Otherwise, the process increases the count of failed synchronizations. If the case doesn't have a contact type, the number of failed records increases.
Prepare Email with Result	Collects the result that contains the number of successful and failed synchronization cases in the email.
Send Email with Result	Sends an email with the results.
End	Ends the process.

Create Incident process

The Create Incident process searches for the incidents in ServiceNow and creates or updates the incidents based on the search result in ServiceNow.

The Create Incident process is used as a subprocess in the Synchronize Dynamics 365 Cases with ServiceNow Incidents process.

The following image shows the steps that the Create Incident process contains:



The following table lists the steps that the Create Incident process contains:

Step Name	Description
Start	The process searches for the case object in Dynamics 365.
Get Dynamics 365 Access Token	Gets an access token to authorize all the connection requests in Dynamics 365.
Get Contact and Owner	The process searches for a customer in the contacts table. If the case specifies an account instead of a contact, the service call ends with an error, and the process initiates a new search in the account table.
Get ServiceNow Access Token	Gets an access token to authorize all the connection requests in ServiceNow.
Search Caller and Assign To IDs	Searches users by the Caller and Assign To IDs fields simultaneously in ServiceNow. The process searches for the caller by email in ServiceNow and gets the caller ID. If the caller is missing, the process creates a caller in ServiceNow and gets the caller ID. Otherwise, the process continues to the next step. The process simultaneously searches for the Assign to field, that is, the owner in ServiceNow and gets the Assign to ID value. If the owner is missing, the process creates an Assign to user field in ServiceNow and gets the Assign to ID value. Otherwise, the process continues to the next step.
Search Incident by Short Description	Searches for the incident by short description in ServiceNow.
Get Incident ID	Gets the incident ID.
Is Incident 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 Dynamics 365 Cases with ServiceNow Incidents recipe

To use the Synchronize Dynamics 365 Cases with ServiceNow Incidents recipe, you must perform the following steps manually:

Step 1: Copy and access the recipe

Step 2: Configure and publish the Dynamics365ConnectionIncident connection

Step 3: Configure and publish the EmailConnection connection

Step 4: Configure and publish the ServiceNowConnectionIncident connection

Step 5: Configure and publish the processes

Step 6: Invoke the process

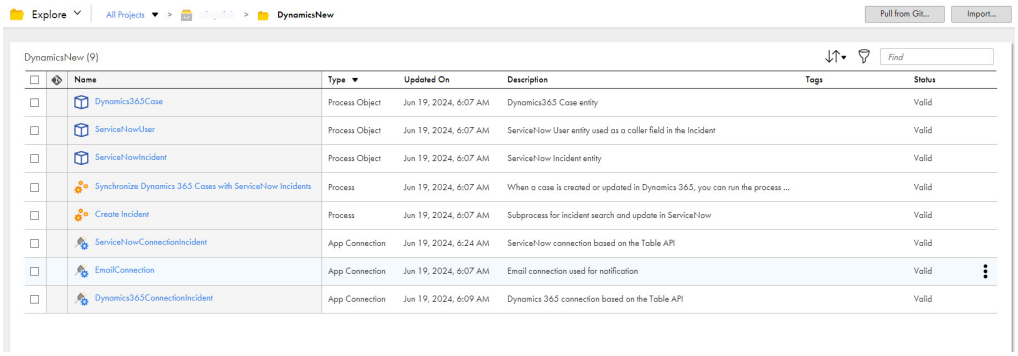
Step 7: Test data synchronization from Dynamics 365 cases to ServiceNow incidents

Copying and accessing the recipe

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

1. Open the **Synchronize Dynamics 365 Cases with ServiceNow Incidents** 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:



Configuring and publishing the Dynamics 365 connection

To configure and publish the Dynamics 365 connection incident, perform the following steps:

1. Open the **Dynamic365ConnectionIncident** connection.
2. In the **Type** field, select **Dynamics365**.
3. In the **Runtime Environment** field, select **Cloud Server or any Secure Agent**.
4. In the **Connection Properties** section, enter values for the following properties:

Property	Description
Tenant_ID	Dynamics 365 tenant ID to get the access token. Enter the tenant ID that you generated under **Microsoft Entra ID** > **App registrations** in Dynamics 365 after creating the client credentials.
Client_ID	Dynamics 365 client ID to generate a valid access token. Enter the client ID that you generated under **Microsoft Entra ID** > **App registrations** in Dynamics 365.
Client_Secret	Dynamics 365 client secret that you generated under **Microsoft Entra ID** > **App registrations** in Dynamics 365.
Grant_type	Grant type that the Dynamics 365 instance uses to get an access token for third-party client authorization. Enter the value as **client_credentials**.
Resource_URL	URL to access the Dynamics 365 instance.

5. Save and publish the connection.

Configuring and publishing the ServiceNow connection

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

1. Open the **ServiceNowConnectionIncident** connection.
2. In the **Type** field, select **ServiceNow**.
3. In the **Runtime Environment** field, select **Cloud Server or any Secure Agent**.
4. 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**.

5. Save and publish the connection.

Configuring and publishing the Email connection

To configure and publish the Email connection, perform the following steps:

1. Open the **EmailConnection** connection.
2. In the **Type** field, select **IICS Cloud Application Integration Email Service (Licensed for use)**.
3. In the **Runtime Environment** field, select **Cloud Server or any Secure Agent**.

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

Property	Description
User Name	User name to log in to the email server. The user name is either the account name or the email address that is used to send the email with the synchronization results. For example: `notifyme@mydomain.com`
Password	Password for the email address. Set an API key for your email account. For information about creating an API key, see Create API credentials.
Security	Select **SSL** for the Email connection to use the SSL protocol.

Configure the following common properties on the connection creation page:

Property	Description
Host	Email server's DNS name, such as `mail.mydomain.com`, or an IP address, such as `192.168.1.1`.
Port	Port for communication between the Process Server and the email server. Default is **25**.

5. Save and publish the connection.

Configuring and publishing the processes

To configure and publish the processes, perform the following steps:

1. Open the **Create Incident** process.
2. On the **Start** tab of the Start step, select **Cloud Server** in the **Run On** field.
3. Optionally, you can change the tracing level from **Verbose** to **None** on the **Advanced** tab.
4. Save and publish the process.
5. Open the **Synchronize Dynamics 365 Cases with ServiceNow Incidents process** process.
6. On the **Start** tab of the Start step, select **Cloud Server** in the **Run On** field.
7. Optionally, you can change the tracing level from **Verbose** to **None** on the **Advanced** tab.
8. Optionally, you can change the period from when you want to synchronize the data in the **filter** input field in the **Get Last Created Case** step.
9. Save and publish the process.

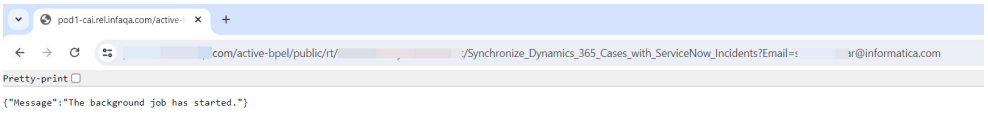
Invoking the process

When you invoke the Synchronize Dynamics 365 Cases with ServiceNow Incidents process, the user receives a notification stating that the process is running in the background. After the process runs, the user receives

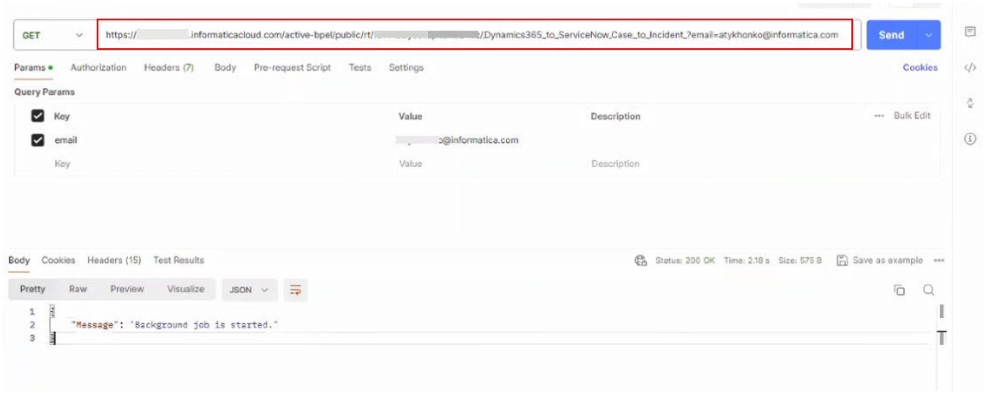
an email with the number of successful synchronizations and a list of case numbers that failed to synchronize.

To invoke a process, you can use one of the following options:

- Passing input through a browser
  1. Open the Synchronize Dynamics 365 Cases with ServiceNow Incidents process and click **Actions** > **Properties Detail** > **Copy Service URL**.
  2. Open a text editor and add the input field and value to the service URL as shown in the following format:
     `<Cloud Application Integration POD URL>/active-bpel/public/rt/<API_name>?Email=<Email_ID>`
  3. Open a browser and paste the service URL as shown in the following image:

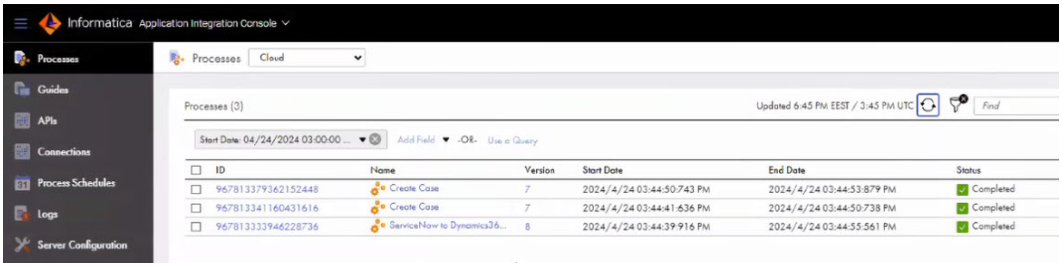
     A message appears stating that the background job has started.
- Passing input through a REST client
  You can use a REST client such as Postman.
  1. Open Postman.
  2. Select the HTTP verb as GET and specify the generated REST service URL followed by the input field and value `?Email=<Email_ID>` as shown in the following sample image:

  3. Enter the user account details on the **Authorization** tab.
  4. Click **Send**.

In Application Integration Console, you can verify whether the process execution was successful or faulted.

The following image shows a successful process execution:



Test data synchronization from Dynamics 365 cases to ServiceNow incidents

When you invoke the process, the HTTP request searches for all the cases that were created or updated during the previous day in Dynamics 365, and the details are synchronized with the ServiceNow incidents without manual intervention.

The following table shows the fields that are synchronized between the Dynamics 365 case and the ServiceNow incident:

Dynamics365 - Case	ServiceNow - Incident
ID	Number
Customer (Type - Contact)	Caller
Owner	Assign to
Case Title	Short description
Description	Description
Origin	Channel
Priority	Urgency
Create Date	Create Date
Last Modify Date	Last Modify Date

Rules and guidelines for using the Synchronize Dynamics 365 Cases with ServiceNow Incidents recipe

Consider the following rules and guidelines when working with the Synchronize Dynamics 365 Cases with ServiceNow Incidents recipe:

- You must use the same Secure Agent to configure the app connections and processes 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 Dynamics 365 cases 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.

- 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.
- Synchronization of Dynamics 365 case to ServiceNow incident is performed on the assumption that the customer in Dynamics 365 is Contact Type. The Dynamic 365 cases with accounts as a customer does not synchronize and return failed case number in email.
- When a case contains a customer with contact, and not the email, the caller in ServiceNow displays the system user that does not have email defined.
- To handle Integer and Double data types correctly and ensure proper behavior in the Dynamics 365 connection, you must specify annotation attributes or additional parameters in the request as shown in the following sample:

```
<account xmlns:m="urn:informatica:ae:xquery:json2xml:meta-data">
<name>test name</name>
<telephone>000-111-22-33</telephone>
<emailaddress>account@test.com</emailaddress>
<fax>123-456</fax>
<revenue m:type="xs:double">1000.50
</revenue>
</account>

<account xmlns:m="urn:informatica:ae:xquery:json2xml:meta-data">
<name>test name</name>
<telephone1>000-257-35-89</telephone1>
<fax>547-890</fax>
<versionnumber m:type="xs:int">1</versionnumber>
</account>
```