Informatica® Cloud Application Integration
July 2024

Synchronize Salesforce Contacts with ServiceNow Users

Informatica Cloud Application Integration Synchronize Salesforce Contacts with ServiceNow Users
July 2024

© Copyright Informatica LLC 2024

This software and documentation contain proprietary information of Informatica LLC and are provided under a license agreement containing restrictions on use and disclosure and are also protected by copyright law. Reverse engineering of the software is prohibited. No part of this document may be reproduced or transmitted in any form, by any means (electronic, photocopying, recording or otherwise) without prior consent of Informatica LLC. This Software may be protected by U.S. and/or international Patents and other Patents Pending.

Use, duplication, or disclosure of the Software by the U.S. Government is subject to the restrictions set forth in the applicable software license agreement and as provided in DFARS 227.7202-1(a) and 227.7702-3(a) (1995), DFARS 252.227-7013©(1)(ii) (OCT 1988), FAR 12.212(a) (1995), FAR 52.227-19, or FAR 52.227-14 (ALT III), as applicable.

The information in this product or documentation is subject to change without notice. If you find any problems in this product or documentation, please report them to us in writing.

Informatica, Informatica Platform, Informatica Data Services, PowerCenter, PowerCenterRT, PowerCenter Connect, PowerCenter Data Analyzer, PowerExchange, PowerMart, Metadata Manager, Informatica Data Quality, Informatica Data Explorer, Informatica B2B Data Transformation, Informatica B2B Data Exchange Informatica On Demand, Informatica Identity Resolution, Informatica Application Information Lifecycle Management, Informatica Complex Event Processing, Ultra Messaging, Informatica Master Data Management, and Live Data Map are trademarks or registered trademarks of Informatica LLC in the United States and in jurisdictions throughout the world. All other company and product names may be trade names or trademarks of their respective owners.

Portions of this software and/or documentation are subject to copyright held by third parties, including without limitation: Copyright DataDirect Technologies. All rights reserved. Copyright © Sun Microsystems. All rights reserved. Copyright © RSA Security Inc. All Rights Reserved. Copyright © Ordinal Technology Corp. All rights reserved. Copyright © Aandacht c.v. All rights reserved. Copyright Genivia, Inc. All rights reserved. Copyright Isomorphic Software. All rights reserved. Copyright © Meta Integration Technology, Inc. All rights reserved. Copyright © Intalio. All rights reserved. Copyright © Oracle. All rights reserved. Copyright © Adobe Systems Incorporated. All rights reserved. Copyright © DataArt, Inc. All rights reserved. Copyright © ComponentSource. All rights reserved. Copyright © Microsoft Corporation. All rights reserved. Copyright © Rogue Wave Software, Inc. All rights reserved. Copyright © Teradata Corporation. All rights reserved. Copyright © Yahoo! Inc. All rights reserved. Copyright © Glyph & Cog, LLC. All rights reserved. Copyright © Thinkmap, Inc. All rights reserved. Copyright © Clearpace Software Limited. All rights reserved. Copyright © Information Builders, Inc. All rights reserved. Copyright © OSS Nokalva, Inc. All rights reserved. Copyright Edifecs, Inc. All rights reserved. Copyright Cleo Communications, Inc. All rights reserved. Copyright © International Organization for Standardization 1986. All rights reserved. Copyright © ej-technologies GmbH. All rights reserved. Copyright © Jaspersoft Corporation. All rights reserved. Copyright © International Business Machines Corporation. All rights reserved. Copyright © yWorks GmbH. All rights reserved. Copyright © Lucent Technologies. All rights reserved. Copyright © University of Toronto. All rights reserved. Copyright © Daniel Veillard. All rights reserved. Copyright © Unicode, Inc. Copyright IBM Corp. All rights reserved. Copyright © MicroQuill Software Publishing, Inc. All rights reserved. Copyright © PassMark Software Pty Ltd. All rights reserved. Copyright © LogiXML, Inc. All rights reserved. Copyright © 2003-2010 Lorenzi Davide, All rights reserved. Copyright © Red Hat, Inc. All rights reserved. Copyright © The Board of Trustees of the Leland Stanford Junior University. All rights reserved. Copyright © EMC Corporation. All rights reserved. Copyright © Flexera Software. All rights reserved. Copyright © Jinfonet Software. All rights reserved. Copyright © Apple Inc. All rights reserved. Copyright © Telerik Inc. All rights reserved. Copyright © BEA Systems. All rights reserved. Copyright © PDFlib GmbH. All rights reserved. Copyright © Orientation in Objects GmbH. All rights reserved. Copyright © Tanuki Software, Ltd. All rights reserved. Copyright © Ricebridge. All rights reserved. Copyright © Sencha, Inc. All rights reserved. Copyright © Scalable Systems, Inc. All rights reserved. Copyright © jQWidgets. All rights reserved. Copyright © Tableau Software, Inc. All rights reserved. Copyright© MaxMind, Inc. All Rights Reserved. Copyright © TMate Software s.r.o. All rights reserved. Copyright © MapR Technologies Inc. All rights reserved. Copyright © Amazon Corporate LLC. All rights reserved. Copyright © Highsoft. All rights reserved. Copyright © Python Software Foundation. All rights reserved. Copyright © BeOpen.com. All rights reserved. Copyright © CNRI. All rights reserved.

This product includes software developed by the Apache Software Foundation (http://www.apache.org/), and/or other software which is licensed under various versions of the Apache License (the "License"). You may obtain a copy of these Licenses at http://www.apache.org/licenses/. Unless required by applicable law or agreed to in writing, software distributed under these Licenses is distributed on an "AS IS" BASIS, WITHOUT WARRANTIES OR CONDITIONS OF ANY KIND, either express or implied. See the Licenses for the specific language governing permissions and limitations under the Licenses.

This product includes software which was developed by Mozilla (http://www.mozilla.org/), software copyright The JBoss Group, LLC, all rights reserved; software copyright © 1999-2006 by Bruno Lowagie and Paulo Soares and other software which is licensed under various versions of the GNU Lesser General Public License Agreement, which may be found at http:// www.gnu.org/licenses/lgpl.html. The materials are provided free of charge by Informatica, "as-is", without warranty of any kind, either express or implied, including but not limited to the implied warranties of merchantability and fitness for a particular purpose.

The product includes ACE(TM) and TAO(TM) software copyrighted by Douglas C. Schmidt and his research group at Washington University, University of California, Irvine, and Vanderbilt University, Copyright (©) 1993-2006, all rights reserved.

This product includes software developed by the OpenSSL Project for use in the OpenSSL Toolkit (copyright The OpenSSL Project. All Rights Reserved) and redistribution of this software is subject to terms available at http://www.openssl.org and http://www.openssl.org/source/license.html.

This product includes Curl software which is Copyright 1996-2013, Daniel Stenberg, <daniel@haxx.se>. All Rights Reserved. Permissions and limitations regarding this software are subject to terms available at http://curl.haxx.se/docs/copyright.html. Permission to use, copy, modify, and distribute this software for any purpose with or without fee is hereby granted, provided that the above copyright notice and this permission notice appear in all copies.

The product includes software copyright 2001-2005 (©) MetaStuff, Ltd. All Rights Reserved. Permissions and limitations regarding this software are subject to terms available at http://www.dom4j.org/ license.html.

The product includes software copyright © 2004-2007, The Dojo Foundation. All Rights Reserved. Permissions and limitations regarding this software are subject to terms available at http://dojotoolkit.org/license.

This product includes ICU software which is copyright International Business Machines Corporation and others. All rights reserved. Permissions and limitations regarding this software are subject to terms available at http://source.icu-project.org/repos/icu/icu/trunk/license.html.

This product includes software copyright © 1996-2006 Per Bothner. All rights reserved. Your right to use such materials is set forth in the license which may be found at http:// www.gnu.org/software/ kawa/Software-License.html.

This product includes OSSP UUID software which is Copyright © 2002 Ralf S. Engelschall, Copyright © 2002 The OSSP Project Copyright © 2002 Cable & Wireless Deutschland. Permissions and limitations regarding this software are subject to terms available at http://www.opensource.org/licenses/mit-license.php.

This product includes software developed by Boost (http://www.boost.org/) or under the Boost software license. Permissions and limitations regarding this software are subject to terms available at http:/ /www.boost.org/LICENSE_1_0.txt.

This product includes software copyright © 1997-2007 University of Cambridge. Permissions and limitations regarding this software are subject to terms available at http:// www.pcre.org/license.txt.

This product includes software copyright © 2007 The Eclipse Foundation. All Rights Reserved. Permissions and limitations regarding this software are subject to terms available at http:// www.eclipse.org/org/documents/epl-v10.php and at http://www.eclipse.org/org/documents/edl-v10.php.

This product includes software licensed under the terms at http://www.tcl.tk/software/tcltk/license.html, http://www.bosrup.com/web/overlib/?License, http://www.stlport.org/doc/ license.html, http://asm.ow2.org/license.html, http://www.cryptix.org/LICENSE.TXT, http://hsqldb.org/web/hsqlLicense.html, http://httpunit.sourceforge.net/doc/ license.html, http://jung.sourceforge.net/license.txt , http://www.gzip.org/zlib/zlib_license.html, http://www.openldap.org/software/release/license.html, http://www.libssh2.org, http://slf4j.org/license.html, http://www.sente.ch/software/OpenSourceLicense.html, http://fusesource.com/downloads/license-agreements/fuse-message-broker-v-5-3- license-agreement; http://antlr.org/license.html; http://aopalliance.sourceforge.net/; http://www.bouncycastle.org/licence.html; http://www.jgraph.com/jgraphdownload.html; http://www.jcraft.com/jsch/LICENSE.txt; http://jotm.objectweb.org/bsd_license.html; . http://www.w3.org/Consortium/Legal/2002/copyright-software-20021231; http://www.slf4j.org/license.html; http://nanoxml.sourceforge.net/orig/copyright.html; http://www.json.org/license.html; http://forge.ow2.org/projects/javaservice/, http://www.postgresql.org/about/licence.html, http://www.sqlite.org/copyright.html, http://www.tcl.tk/software/tcltk/license.html, http://www.jaxen.org/faq.html, http://www.jdom.org/docs/faq.html, http://www.slf4j.org/license.html; http://www.iodbc.org/dataspace/iodbc/wiki/iODBC/License; http://www.keplerproject.org/md5/license.html; http://www.toedter.com/en/jcalendar/license.html; http://www.edankert.com/bounce/index.html; http://www.net-snmp.org/about/license.html; http://www.openmdx.org/#FAQ; http://www.php.net/license/3_01.txt; http://srp.stanford.edu/license.txt; http://www.schneier.com/blowfish.html; http://www.jmock.org/license.html; http://xsom.java.net; http://benalman.com/about/license/; https://github.com/CreateJS/EaselJS/blob/master/src/easeljs/display/Bitmap.js; http://www.h2database.com/html/license.html#summary; http://jsoncpp.sourceforge.net/LICENSE; http://jdbc.postgresql.org/license.html; http://protobuf.googlecode.com/svn/trunk/src/google/protobuf/descriptor.proto; https://github.com/rantav/hector/blob/master/LICENSE; http://web.mit.edu/Kerberos/krb5-current/doc/mitK5license.html; http://jibx.sourceforge.net/jibx-license.html; https://github.com/lyokato/libgeohash/blob/master/LICENSE; https://github.com/hjiang/jsonxx/blob/master/LICENSE; https://code.google.com/p/lz4/; https://github.com/jedisct1/libsodium/blob/master/LICENSE; http://one-jar.sourceforge.net/index.php?page=documents&file=license; https://github.com/EsotericSoftware/kryo/blob/master/license.txt; http://www.scala-lang.org/license.html; https://github.com/tinkerpop/blueprints/blob/master/LICENSE.txt; http://gee.cs.oswego.edu/dl/classes/EDU/oswego/cs/dl/util/concurrent/intro.html; https://aws.amazon.com/asl/; https://github.com/twbs/bootstrap/blob/master/LICENSE; https://sourceforge.net/p/xmlunit/code/HEAD/tree/trunk/LICENSE.txt; https://github.com/documentcloud/underscore-contrib/blob/master/LICENSE, and https://github.com/apache/hbase/blob/master/LICENSE.txt.

This product includes software licensed under the Academic Free License (http://www.opensource.org/licenses/afl-3.0.php), the Common Development and Distribution License (http://www.opensource.org/licenses/cddl1.php) the Common Public License (http://www.opensource.org/licenses/cpl1.0.php), the Sun Binary Code License Agreement Supplemental License Terms, the BSD License (http:// www.opensource.org/licenses/bsd-license.php), the new BSD License (http://opensource.org/licenses/BSD-3-Clause), the MIT License (http://www.opensource.org/licenses/mit-license.php), the Artistic License (http://www.opensource.org/licenses/artistic-license-1.0) and the Initial Developer's Public License Version 1.0 (http://www.firebirdsql.org/en/initial-developer-s-public-license-version-1-0/).

This product includes software copyright © 2003-2006 Joe Walnes, 2006-2007 XStream Committers. All rights reserved. Permissions and limitations regarding this software are subject to terms available at http://xstream.codehaus.org/license.html. This product includes software developed by the Indiana University Extreme! Lab. For further information please visit http://www.extreme.indiana.edu/.

This product includes software Copyright (c) 2013 Frank Balluffi and Markus Moeller. All rights reserved. Permissions and limitations regarding this software are subject to terms of the MIT license.

See patents at https://www.informatica.com/legal/patents.html.

DISCLAIMER: Informatica LLC provides this documentation "as is" without warranty of any kind, either express or implied, including, but not limited to, the implied warranties of noninfringement, merchantability, or use for a particular purpose. Informatica LLC does not warrant that this software or documentation is error free. The information provided in this software or documentation may include technical inaccuracies or typographical errors. The information in this software and documentation is subject to change at any time without notice.

NOTICES

This Informatica product (the "Software") includes certain drivers (the "DataDirect Drivers") from DataDirect Technologies, an operating company of Progress Software Corporation ("DataDirect") which are subject to the following terms and conditions:

1. THE DATADIRECT DRIVERS ARE PROVIDED "AS IS" WITHOUT WARRANTY OF ANY KIND, EITHER EXPRESSED OR IMPLIED, INCLUDING BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE AND NON-INFRINGEMENT.
2. IN NO EVENT WILL DATADIRECT OR ITS THIRD PARTY SUPPLIERS BE LIABLE TO THE END-USER CUSTOMER FOR ANY DIRECT, INDIRECT, INCIDENTAL, SPECIAL, CONSEQUENTIAL OR OTHER DAMAGES ARISING OUT OF THE USE OF THE ODBC DRIVERS, WHETHER OR NOT INFORMED OF THE POSSIBILITIES OF DAMAGES IN ADVANCE. THESE LIMITATIONS APPLY TO ALL CAUSES OF ACTION, INCLUDING, WITHOUT LIMITATION, BREACH OF CONTRACT, BREACH OF WARRANTY, NEGLIGENCE, STRICT LIABILITY, MISREPRESENTATION AND OTHER TORTS.

Publication Date: 2024-07-30

Table of Contents

Preface 5

Chapter 1: Synchronize Salesforce Contacts with ServiceNow Users recipe overview 6

Prerequisites for creating a custom field in the Salesforce contact entity. 6

Chapter 2: Synchronize Salesforce Contacts with ServiceNow Users recipe contents 8

Synchronize Salesforce Contacts with ServiceNow Users recipe assets. 9

Chapter 3: Using the Synchronize Salesforce Contacts with ServiceNow Users recipe 10

Copying and accessing the recipe. 10

Configuring and publishing the Salesforce connection. 11

Configuring and publishing the ServiceNow connection 12

Configuring and publishing the process 13

Invoking the process. 13

Preface

Use *Synchronize Salesforce Contacts with ServiceNow Users* to learn how to synchronize Salesforce contacts with ServiceNow users. 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 Salesforce Connector and ServiceNow Connector concepts.

CHAPTER 1

Synchronize Salesforce Contacts with ServiceNow Users recipe overview

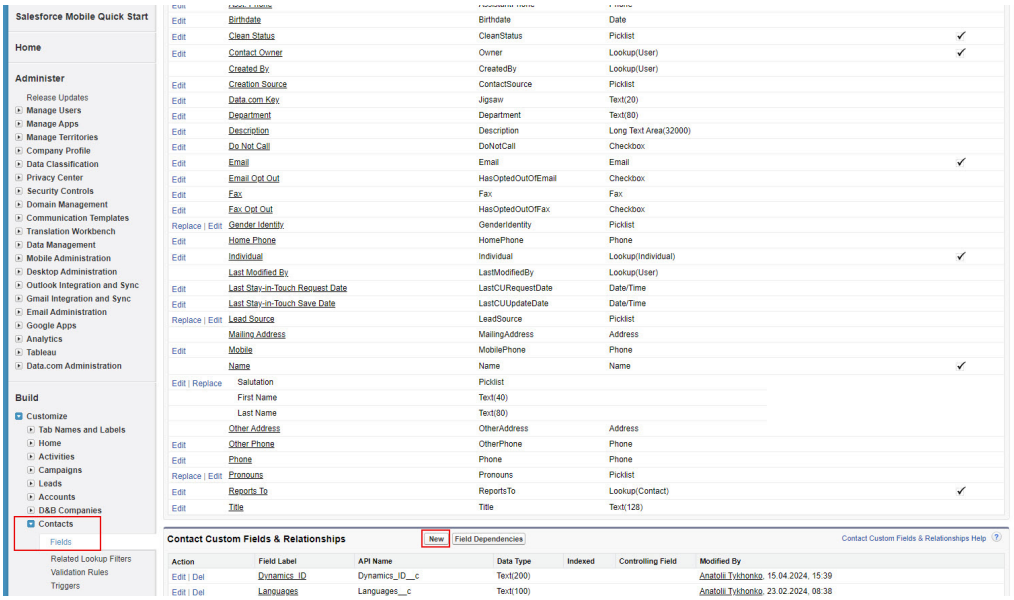
The Synchronize Salesforce Contacts with ServiceNow Users recipe is based on REST and SOAP APIs.

The process is called by an HTTP request with the contact ID as an incoming parameter. After successful initial validation by ID and email, the process gets value from the **ServiceNow_ID** custom field in the Salesforce contact entity. The process then searches for the user by ID in the ServiceNow **Users** table. If the user does not exist in the table, the process creates a user with the **Username**, **First Name**, **Last Name**, **Email**, and **Phone** fields. The process then returns the user ID from ServiceNow.

Prerequisites for creating a custom field in the Salesforce contact entity

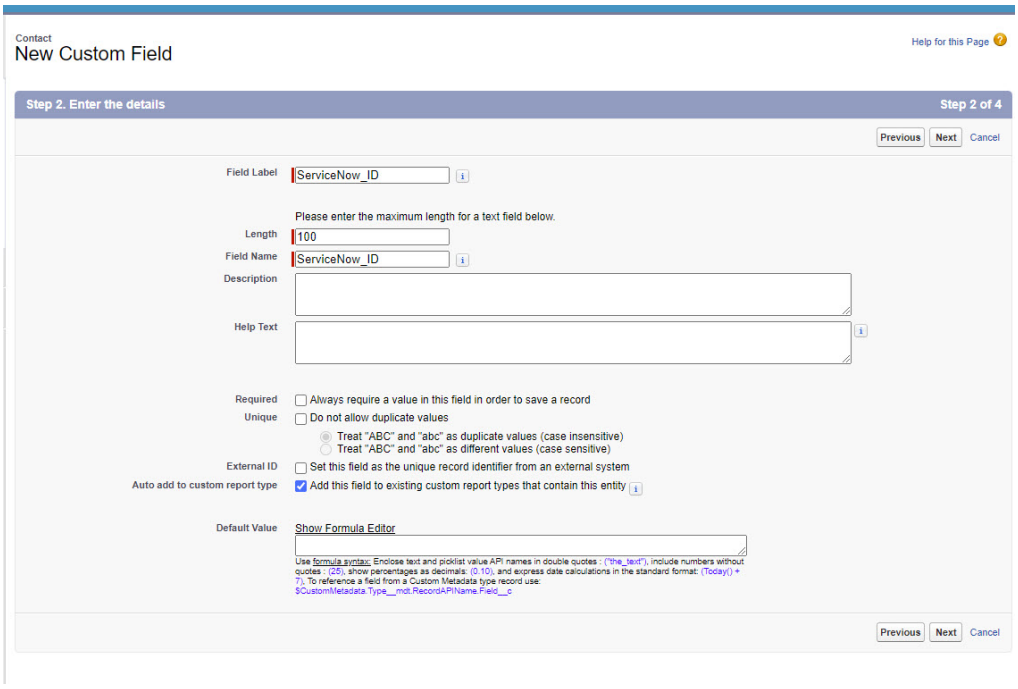
To create a custom field in the Salesforce contact entity, perform the following steps:

1. Log in to the Salesforce organization.
2. Go to **Setup** > **Build** > **Customize** > **Contacts** > **Fields**, and then click **New**.
   The following image shows the **New** button on the **Contacts Fields** page:



3. In the **Field Label** field, enter the **ServiceNow_ID** value and save the custom field. You must create a custom field in Salesforce with the **Text** data type.

   The following image shows the **New Custom Field** page:

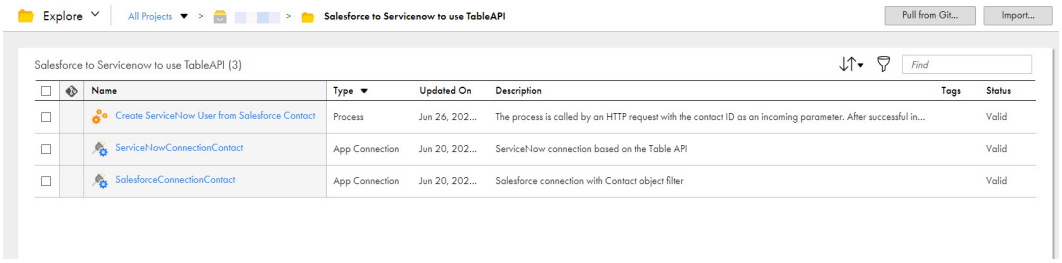


CHAPTER 2

Synchronize Salesforce Contacts with ServiceNow Users recipe contents

The Synchronize Salesforce Contacts with ServiceNow Users recipe contains multiple assets such as app connections and process.

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



Synchronize Salesforce Contacts with ServiceNow Users recipe assets

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

Asset Name	Asset Type	Description
SaleforceConnectionContact	App Connection	Salesforce connection with the Contact object filter.
ServiceNowConnectionContact	App Connection	ServiceNow connection based on the Table API.
Create ServiceNow User from Salesforce Contact	Process	The process is called by an HTTP request with the contact ID as an incoming parameter. After successful initial validation by ID and email, the process searches for the user by ID in the ServiceNow **Users** table. If the user does not exist in the table, the process creates a user with the **Username**, **First Name**, **Last Name**, **Email**, and **Phone** fields. The process then returns the user ID in ServiceNow.

CHAPTER 3

Using the Synchronize Salesforce Contacts with ServiceNow Users recipe

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

Step 1: Copy and access the recipe

Step 2: Configure and publish the SalesforceConnectionContact connection

Step 3: Configure and publish the ServiceNowConnectionContact connection

Step 4: Configure and publish the process

Step 5: Invoke the process

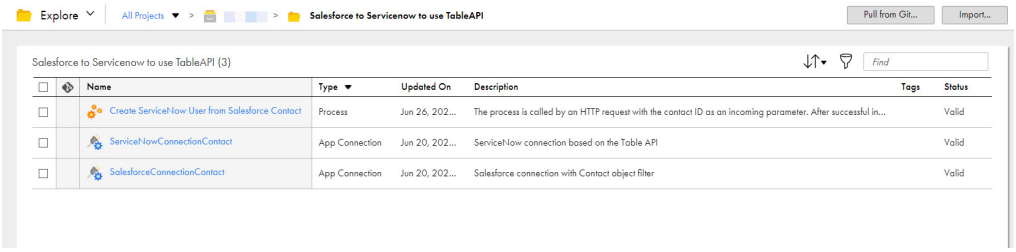
Copying and accessing the recipe

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

1. Open the **Synchronize Salesforce Contacts with ServiceNow Users** 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 Salesforce connection

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

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

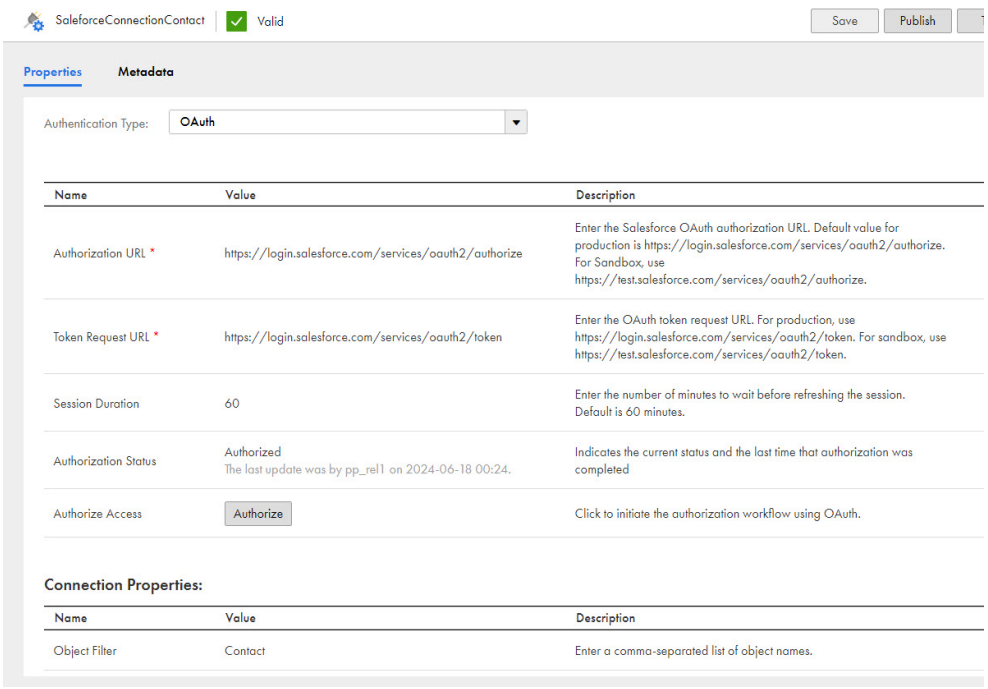
   Based on the authentication type selected, perform one of the following steps:

   - 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.

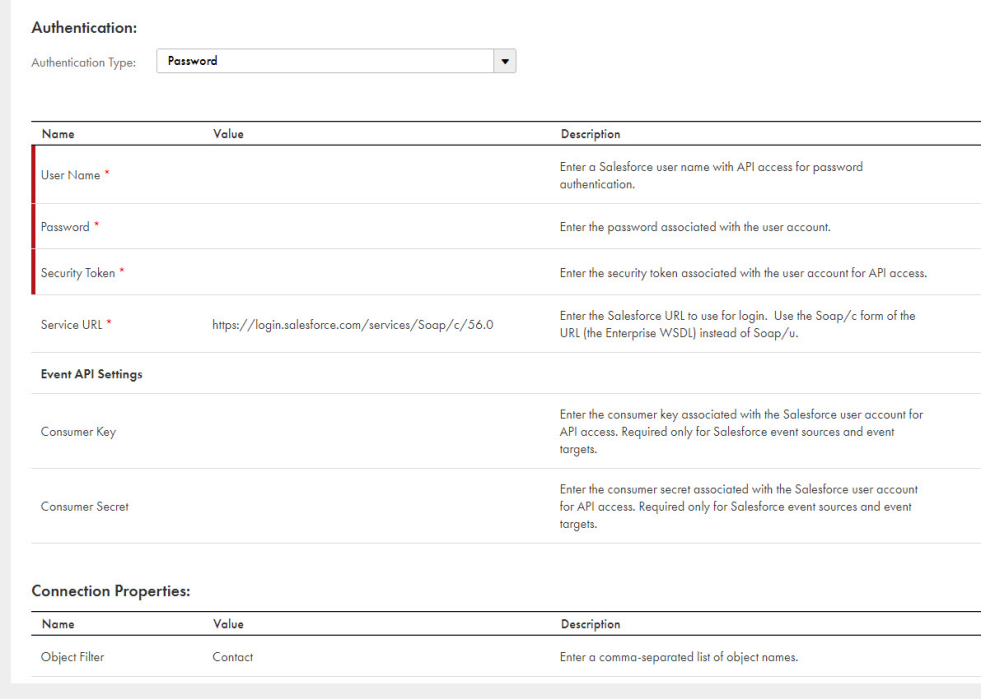
     The following image shows the **SalesforceConnectionContact** connection detail page with the authentication type set to **OAuth**:



   - For **Password** authentication, enter values for the following properties:

     - User Name: Salesforce developer account user name.
     - Password: Salesforce developer account password.
     - Security Token: Salesforce security token.

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



5. Save and publish the connection.

Configuring and publishing the ServiceNow connection

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

1. Open the **ServiceNowConnectionContact** connection.
2. In the **Type** field, select **ServiceNow**.
3. In the **Run On** 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.

Property	Description
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 process

1. Open the **Create ServiceNow User from Salesforce Contact** process.
2. In the **Applies To** field, select **Contact (SalesforceConnectionContact)**.
3. On the **Start** tab of the Start step, select **Cloud Server** from the **Run On** list.
4. Optionally, you can change the tracing level from **Verbose** to **None** on the **Advanced** tab.
5. Save and publish the process.

Invoking the process

To invoke the Create ServiceNow User from Salesforce Contact process, perform the following steps:

1. Open the Create ServiceNow User from Salesforce Contact process and click **Actions** > **Properties Detail** > **Copy Service URL**.
2. Open a text editor and add the Salesforce contact ID value as shown in the following format:

   ```
   <Cloud Application Integration POD URL>/active-bpel/public/rt/<API_name>/
   Create_ServiceNow_User_from_Salesforce_Contact-1/id/{id}
   ```

3. Open a browser, paste the service URL, and press enter.
   The user ID from ServiceNow appears.