



Informatica® Cloud Application Integration
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Synchronize Salesforce Cases with ServiceNow Incidents based on Platform Events

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Preface

Use *Synchronize Salesforce Cases with ServiceNow Incidents based on Platform Events* to learn how to synchronize Salesforce cases 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 Cases with ServiceNow Incidents recipe

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

When a case is created or updated in Salesforce, a Salesforce platform event triggers the process. The process checks whether the case contact or case owner matches with the email of the user in ServiceNow. If the user does not exist, the process creates a user in ServiceNow and assigns it as a caller to the ServiceNow incident. 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 cases with ServiceNow incidents without any manual intervention.

Watch an [interactive demo](#) to know more about how to use this recipe.

Example

Consider that the customer support team in your organization uses Salesforce to manage and maintain customer service cases. 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 case, they communicate the relevant case details manually to the IT team. The IT 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 immediate access to critical customer data about product issues.

CHAPTER 2

Prerequisites for configuring a Salesforce platform event

The Synchronize Salesforce Cases 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 Case 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 Case 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:

The screenshot shows the 'Platform Events' page. At the top right, there is a 'Help for this Page' link. Below the header, there is a sub-header 'Platform Events' and a description: 'Use platform events to define the data to be delivered in custom notifications.' There are two main sections: 'Event Allocations' and 'Custom Events'. The 'Event Allocations' section contains a table with the following data:

Item	Usage	Allocation
High-Volume Platform Event Hourly Publishing Allocation	0	50 000
High-Volume Platform Event and Change Event Daily Delivery Allocation	0	10 000

The 'Custom Events' section has a 'New Platform Event' button. Below it is a table with the following data:

Action	Label	Deployed	Description
Edit Del	ContactPE	✓	
Edit Del	Subscription to Case	✓	
Edit Del	Subscription to incident	✓	
Edit Del	Test_Case	✓	
Edit Del	Test_Inc	✓	

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:

The screenshot shows the 'New Platform Event' form. At the top, there is a message: '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.' Below this is the 'Platform Event Definition Edit' section with 'Save', 'Save & New', and 'Cancel' buttons. The 'Platform Event Information' section contains the following fields:

- Label:
- Plural Label:
- Starts with vowel sound:
- The object name is used when referencing the event via the API. Object Name:
- Description:
- Event Type: High Volume
- Publish Behavior: Publish Immediately

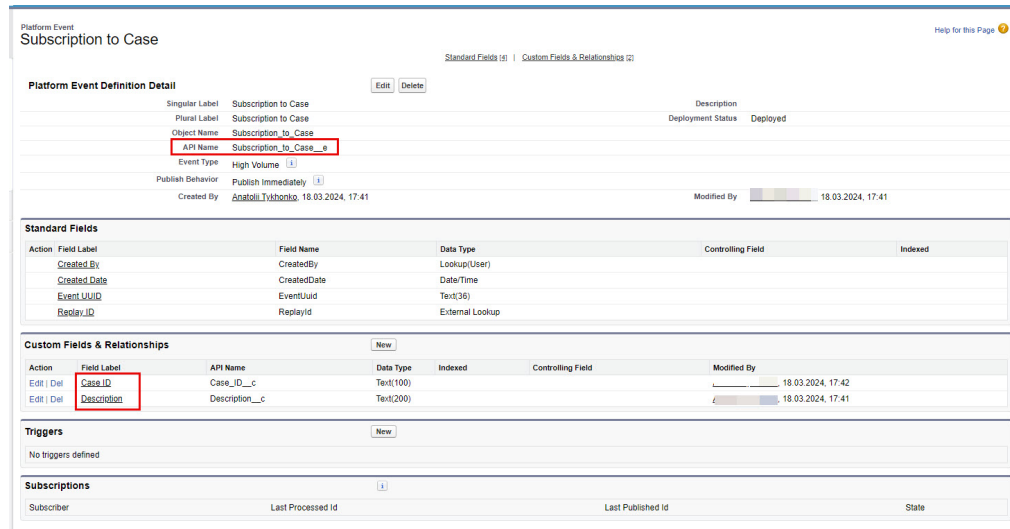
The 'Deployment Status' section has two radio buttons: 'In Development' and 'Deployed' (which is selected). At the bottom, there are 'Save', 'Save & New', and 'Cancel' buttons.

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.

- In the **Custom Field & Relationships** section, add custom fields named **Case 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:

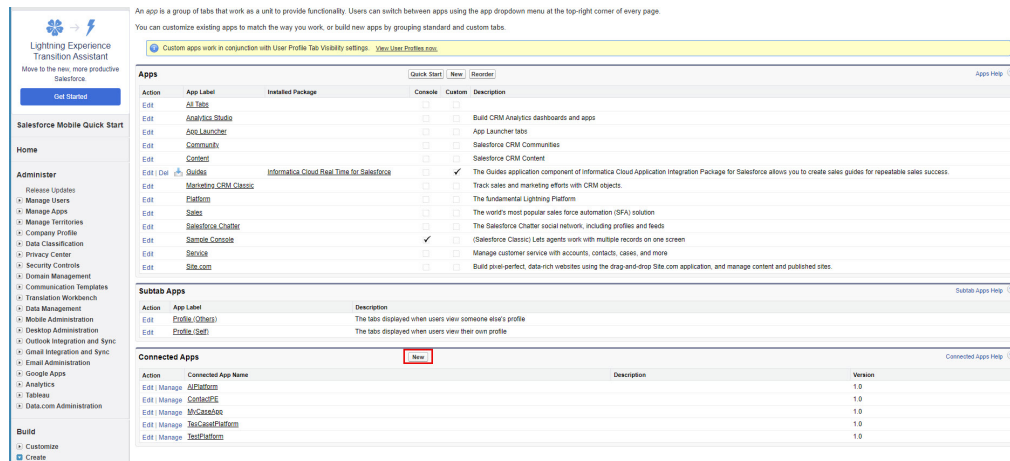


Create a new connected app

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.

- 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:



- Enter the details in the **Connected App Name**, **API Name**, and **Contact Email** fields.
- Select the **Enable OAuth Settings** option.
- 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:

The screenshot shows the 'Connected App Name' configuration page for 'AIPlatform'. The page is divided into two main sections: 'Basic Information' and 'API (Enable OAuth Settings)'. In the 'Basic Information' section, the 'Connected App Name' and 'API Name' are both set to 'AIPlatform'. The 'API Name' field is highlighted with a red box. In the 'API (Enable OAuth Settings)' section, the 'Enable OAuth Settings' checkbox is checked. The 'Callback URL' is set to 'https://pod51.informaticacloud.com/tegricalback', which is also highlighted with a red box. The 'Selected OAuth Scopes' section shows a list of available scopes, with several selected and moved to the 'Selected OAuth Scopes' list. The selected scopes include: 'Access Analytics REST API Charts Geodata resources (eclair_api)', 'Access Analytics REST API resources (vava_api)', 'Access Connect REST API resources (chatter_api)', 'Access Einstein GPT services (einstein_gpt_api)', 'Access Headless Forgot Password API (forgot_password)', 'Access Headless Passwordless Login API (pwdless_login_api)', 'Access Headless Registration API (user_registration_api)', 'Access Interaction API resources (interaction_api)', 'Access Lightning applications (lightning)', and 'Access Visualforce applications (visualforce)'. The 'Add' button is highlighted with a red box. At the bottom of the page, there are several checkboxes for security settings, all of which are checked: 'Require Proof Key for Code Exchange (PKCE)', 'Require Secret for Web Server Flow', 'Require Secret for Refresh Token Flow', and 'Enable Client Credentials Flow'.

6. Click **Save**.
7. Go to the **API (Enable OAuth Settings)** section and click **Manage Consumer Details** as shown in the following image:

Connected App Name
AIPlatform

[← Back to List: Custom Apps](#)

[Edit](#) [Delete](#) [Manage](#)



Version	1.0
API Name	AIPlatform
Created Date	27.02.2024, 14:20
By:	[User]
Contact Email	[User]@ca.com
Contact Phone	
Last Modified Date	06.03.2024, 10:39
By:	[User]
Description	
Info URL	

▼ API (Enable OAuth Settings)

Consumer Key and Secret [Manage Consumer Details](#)

Selected OAuth Scopes

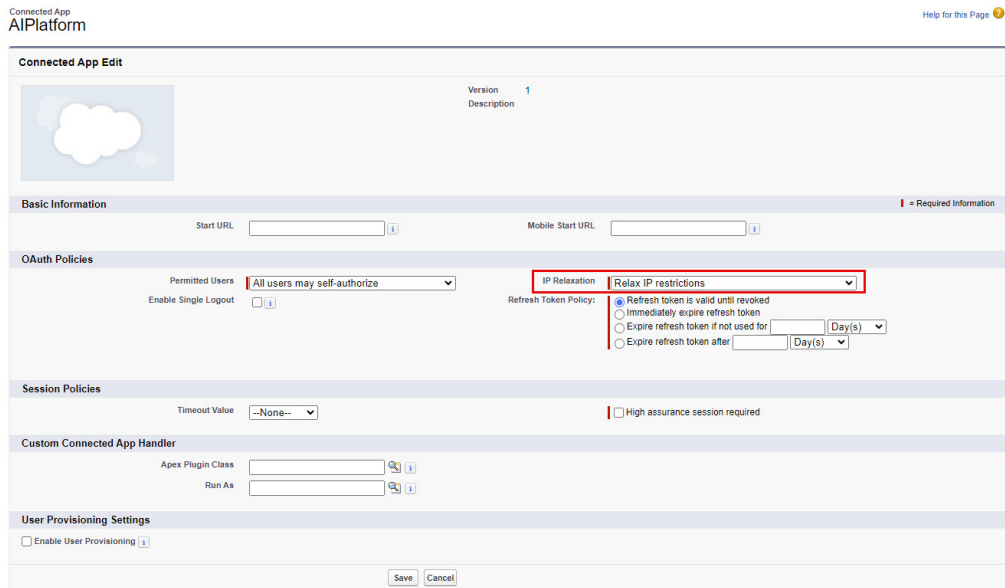
- Access the identity URL service (id, profile, email, address, phone)
- Manage user data via APIs (api)
- Manage user data via Web browsers (web)
- Full access (full)
- Access Connect REST API resources (chatter_api)
- Access Visualforce applications (visualforce)
- Perform requests at any time (refresh_token, offline_access)
- Access unique user identifiers (openid)
- Access custom permissions (custom_permissions)
- Access Analytics REST API resources (wave_api)
- Access Analytics REST API Charts Geodata resources (clair_api)
- Manage Pardot services (pardot_api)
- Access Lightning applications (lightning)
- Access content resources (content)
- Manage Data Cloud Ingestion API data (cdp_ingest_api)
- Manage Data Cloud profile data (cdp_profile_api)
- Perform ANSI SQL queries on Data Cloud data (cdp_query_api)
- Access chatbot services (chatbot_api)
- Perform segmentation on Data Cloud data (cdp_segment_api)
- Manage Data Cloud Identity Resolution (cdp_identityresolution_api)
- Access Headless Forgot Password API (forgot_password)
- Manage Data Cloud Calculated Insight data (cdp_calculated_insight_api)
- Access Headless Registration API (user_registration_api)
- Access the Salesforce API Platform (sfap_api)
- Access Interaction API resources (interaction_api)
- Access all Data Cloud API resources (cdp_api)
- Access Einstein GPT services (einstein_gpt_api)
- Access Headless Passwordless Login API (pwdless_login_api)

Callback URL <https://usw1-cai.dmr-us.informaticacloud.com/login/callback>

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

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

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



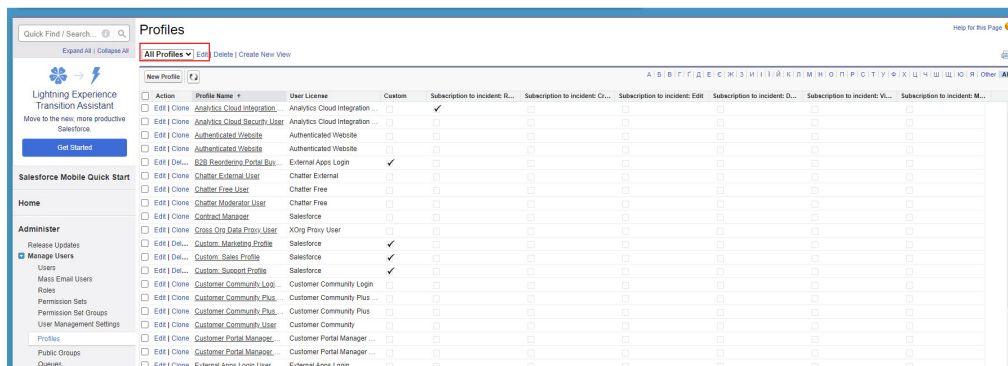
10. Select **Relax IP restrictions** in the **IP Relaxation** field.
11. Click **Save**.

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:



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	

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.

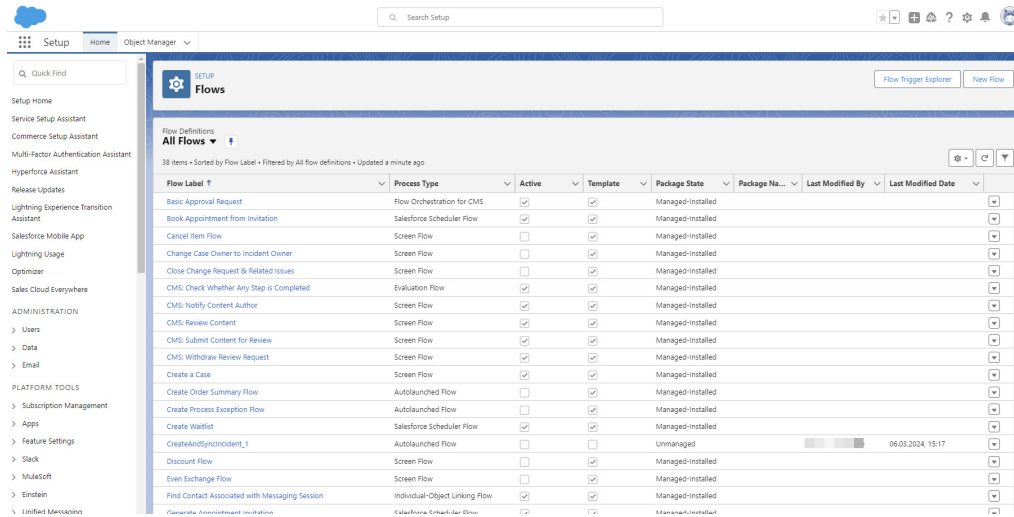
Create a trigger to generate an event

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.

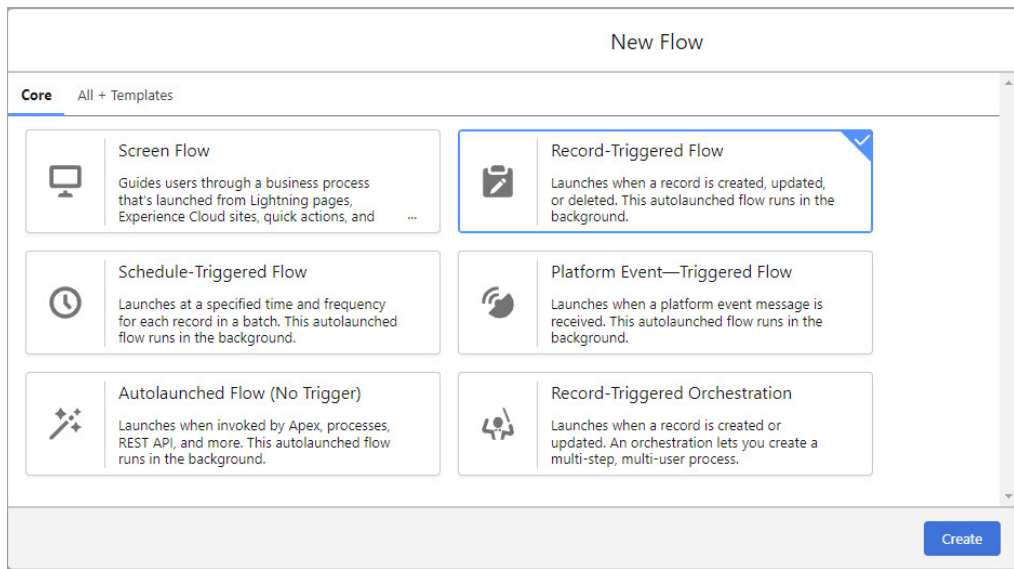
1. Go to **Setup > Process Automation > Flows**, and then click **New Flow**.

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



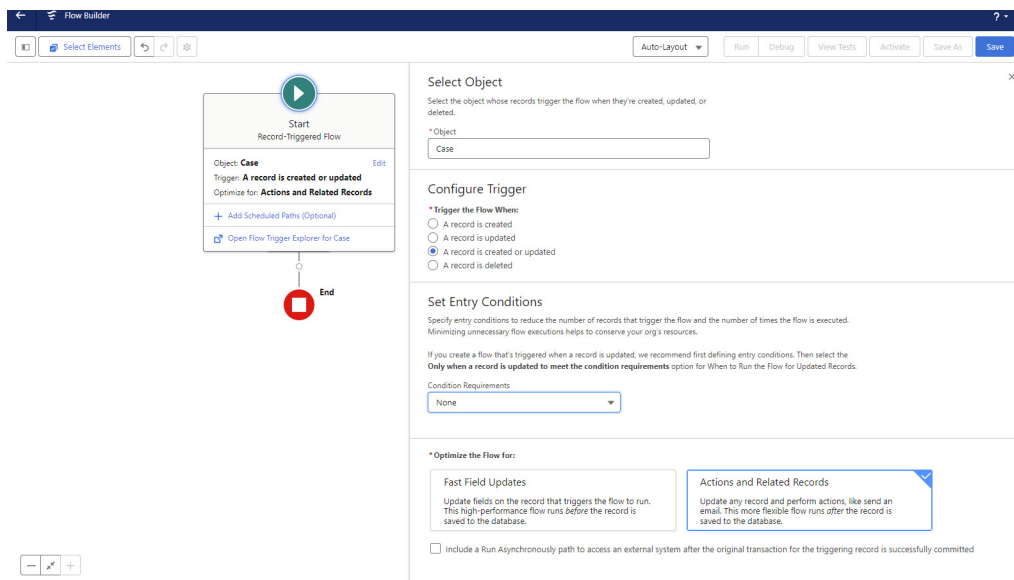
2. Select **Record-Triggered Flow**.

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

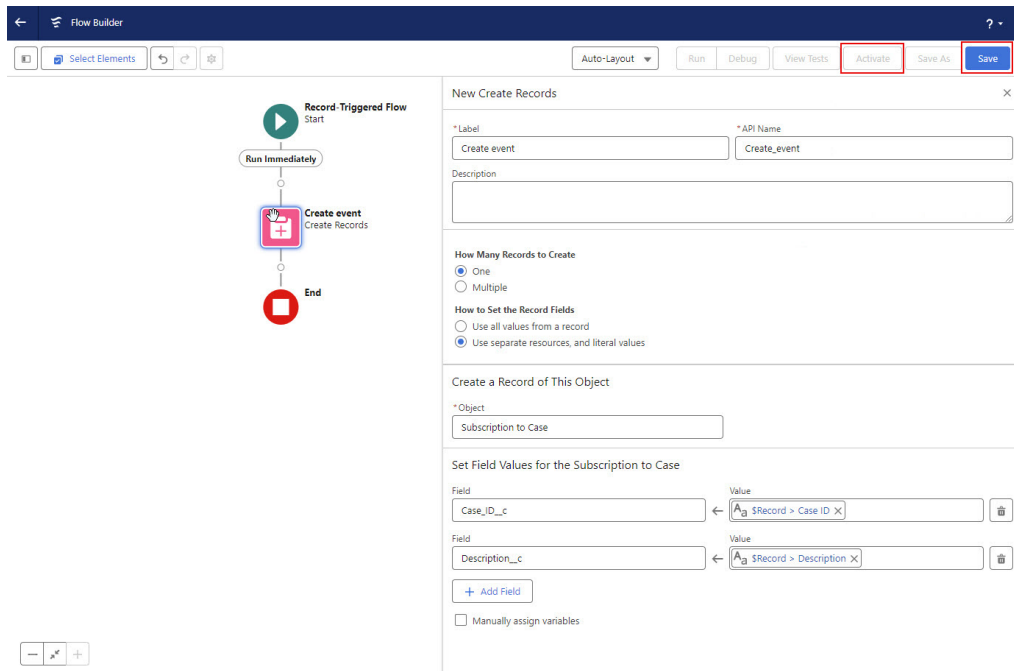


3. Click **Create**.
4. In the **Object** field, select the object as **Case**.
5. In the **Configure Trigger** section, select the **A record is created or updated** option.

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



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 Case** field, map the fields in the Salesforce platform event using the **{!\$Record}** in the **Value** field.



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

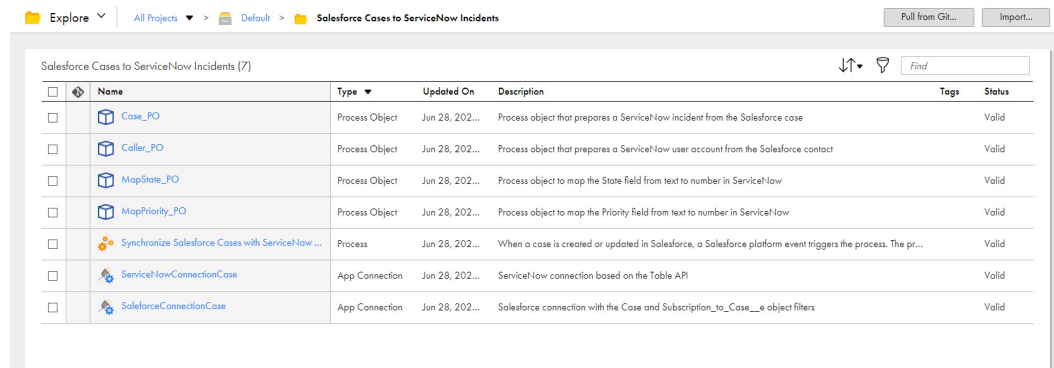
After completing these steps, you have the event consumer, consumer key, and consumer secret values for setting up the Salesforce connection in Application Integration.

CHAPTER 3

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 Cases with ServiceNow Incidents based on Platform Events recipe package contains:



Synchronize Salesforce Cases with ServiceNow Incidents based on Platform Events recipe assets

The following table lists the assets that the Synchronize Salesforce Cases with ServiceNow Incidents based on Platform Events recipe package contains:

Asset Name	Asset Type	Description
Caller_PO	Process object	Prepares a ServiceNow user account from the Salesforce contact.
Case_PO	Process object	Prepares a ServiceNow incident from the Salesforce case.
MapPriority_PO	Process object	Maps the Priority field from the text data type to the number data type in ServiceNow.
MapState_PO	Process object	Maps the State field from the text data type to the number data type in ServiceNow.

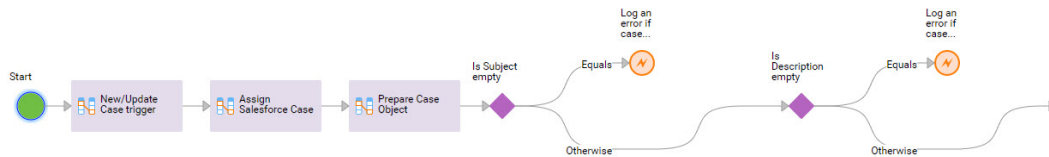
Asset Name	Asset Type	Description
SalesforceConnectionCase	App connection	Connects to the Salesforce platform event with the Case and Subscription_to_Case__e object filters.
ServiceNowConnectionCase	App connection	Connects to ServiceNow based on the Table API.
Synchronize Salesforce Cases with ServiceNow Incidents (using Platform Events)	Process	When a case is created or updated in Salesforce, perform steps to synchronize data from Salesforce cases to ServiceNow incidents.

Synchronize Salesforce Cases with ServiceNow Incidents (using Platform Events)

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

The process checks whether the case contact or case owner matches with the email of the user in ServiceNow. If the user does not exist, the process creates a user in ServiceNow and assigns it as a caller to the ServiceNow incident. The process then searches for a matching incident in ServiceNow by description and creates or updates the incident based on the search results. If the description is modified in the Salesforce case, a new incident is created in ServiceNow with the modified description.

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



The following table lists the steps that the Synchronize Salesforce Cases 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 case.
New/Update Case trigger	Assigns the event details to the case ID and description and triggers the event to verify whether the case was created or updated.
Assign Salesforce Case	Assigns the Salesforce case to a temporary case ID.
Prepare Case Object	Parses the event and assigns values.
Is Subject empty	Verifies whether the case subject is empty. If it is empty, an error occurs, and the process ends. Otherwise, the process continues to the next step.

Step Name	Description
Is Description empty	Verifies whether the case 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 by Email	Searches for the user by email if it is specified in the Salesforce case.
Save 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.
Is Contact in Case set	Searches for the user by email in ServiceNow and saves the owner ID. The process then searches for the owner ID in ServiceNow. If the owner ID is missing in ServiceNow, creates a user as an owner in ServiceNow and gets the owner ID. Otherwise, saves the owner ID.
Search Incident in ServiceNow by Description	Searches for the incident by description 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 4

Using the Synchronize Salesforce Cases with ServiceNow Incidents recipe

To use the Synchronize Salesforce 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 Salesforce connection

Step 3: Configure and publish the ServiceNow connection

Step 4: Configure and publish the process

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

Copying and accessing the recipe

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

1. Open the **Synchronize Salesforce Cases 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.

- 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:

Name	Type	Updated On	Description	Tags	Status
Case_PO	Process Object	Jun 28, 202...	Process object that prepares a ServiceNow incident from the Salesforce case		Valid
Caller_PO	Process Object	Jun 28, 202...	Process object that prepares a ServiceNow user account from the Salesforce contact		Valid
MapState_PO	Process Object	Jun 28, 202...	Process object to map the State field from text to number in ServiceNow		Valid
MapPriority_PO	Process Object	Jun 28, 202...	Process object to map the Priority field from text to number in ServiceNow		Valid
Synchronize Salesforce Cases with ServiceNow ...	Process	Jun 28, 202...	When a case is created or updated in Salesforce, a Salesforce platform event triggers the process. The pr...		Valid
ServiceNowConnectionCase	App Connection	Jun 28, 202...	ServiceNow connection based on the Table API		Valid
SalesforceConnectionCase	App Connection	Jun 28, 202...	Salesforce connection with the Case and Subscription_to_Case__e object filters		Valid

Configuring and publishing the Salesforce connection

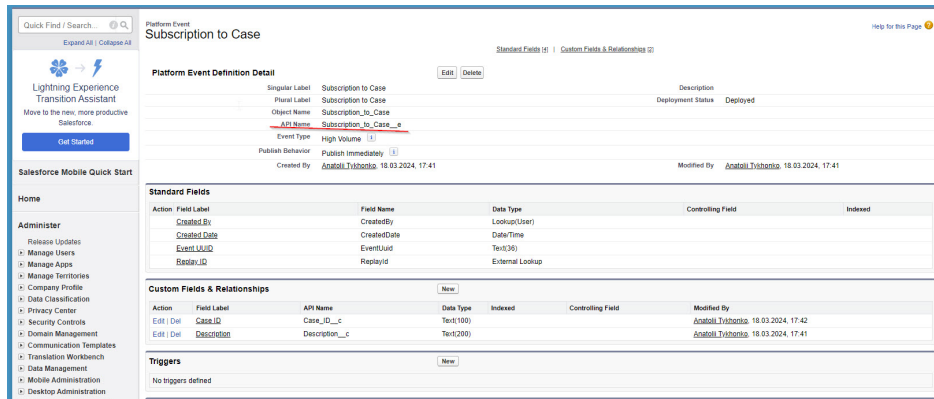
To create a Salesforce connection that supports a Salesforce platform event, perform the following steps:

- Open the **SalesforceConnectionCase** connection.
- In the **Run On** field, select the Secure Agent.
- In the **Authentication Type** field, select **Password** or **OAuth** as required.

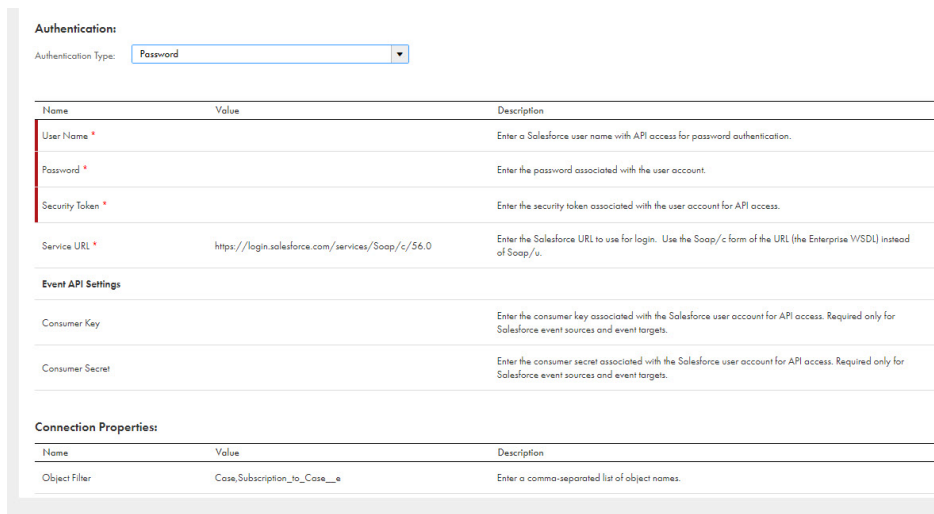
Based on the authentication type selected, perform one of the following steps:

- For **Password** authentication:
 - Enter values for the following properties:
 - User Name: Salesforce developer account user name.
 - Password: Salesforce developer account password.
 - Security Token: Salesforce security token.
 - 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 **Case**. For example, **Case,Subscription_to_Case__e**. The following image shows the API name of the Salesforce platform event:



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

Authentication:

Authentication Type:

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.

Connection Properties:

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

- 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_Case__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.
- Save and publish the connection.

Configuring and publishing the ServiceNow connection

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

- Open the **ServiceNowConnectionCase** connection.
- In the **Type** field, select **ServiceNow**.
- In the **Run On** field, select the 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.

Property	Description
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 **Synchronize Salesforce Cases with ServiceNow Incidents (using Platform Events)** process.
2. On the **Start** tab of the Start step, select the Secure Agent 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.

Test data synchronization from Salesforce cases to ServiceNow incidents

After you publish the process, whenever a Salesforce case 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 case and the ServiceNow incident:

Salesforce - Case	ServiceNow - Incident
Number	Number
Contact or Case Owner if the contact is empty	Caller
Subject	Short description
Description	Description
Case Origin (Phone, Email)	Channel
Urgency, Impact (Priority set automatically)	Priority
Create Date	Create Date
Last modify Date	Last modify Date
Owner	Assigned To

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

Consider the following rules and guidelines when working with the Synchronize Salesforce Cases 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 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.
For example, if you change the platform event name in Salesforce from **Subscription_to_Case** to a different name, you must use the same name in the **Event Consumer** field in the SalesforceConnectionCase 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.