ServiceNow QuickConnect

User Guide

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ServiceNow QuickConnect User Manual

App Summary:

ServiceNow QuickConnect is a Salesforce Application. This app is used to connect Salesforce with ServiceNow and vice-versa. It supports point and click Graphical User Interface which is very simple and easy to use.

The app provides bi-directional sync functionality i.e. Salesforce to ServiceNow and ServiceNow to Salesforce. It provides a rich variety of functionality for connecting Salesforce with ServiceNow and vice-versa.

App users can perform following operations: Syncing Salesforce object like Account, contact, case and contract by clicking the respective buttons on the detail page of objects.

Features:

- Company object of ServiceNow is synced with Account Object of Salesforce respectively.

- User object of ServiceNow is synced with Contact Object of Salesforce respectively.

- Incident object of ServiceNow is synced with Case Object of Salesforce respectively.

- Contract object of ServiceNow are synced with Contract Object of Salesforce respectively.

1. Configuration Settings

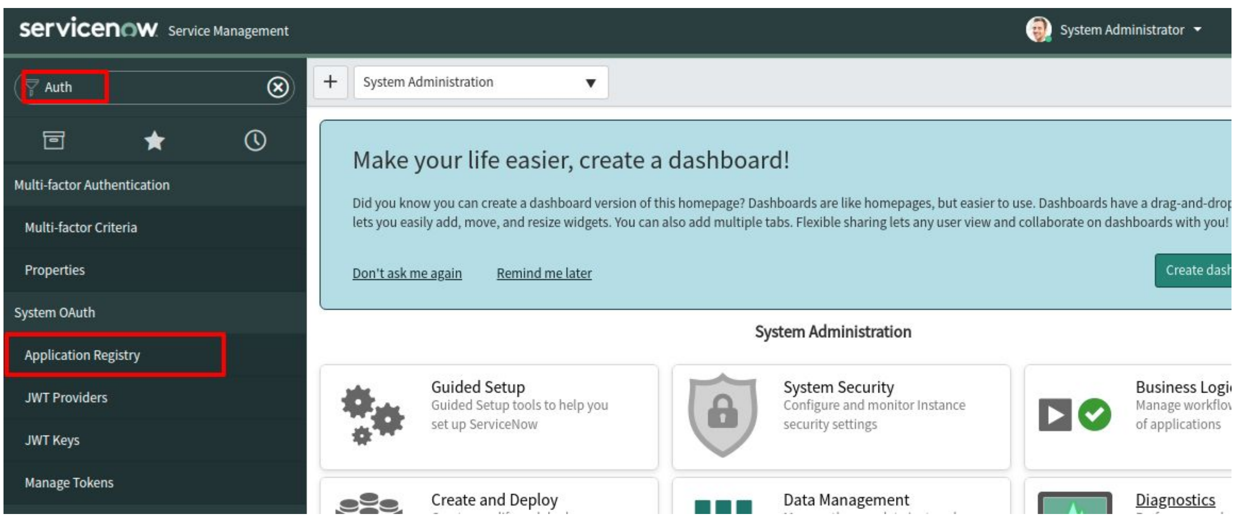
i) AdminSetting:

Some prerequisites for using this app are:

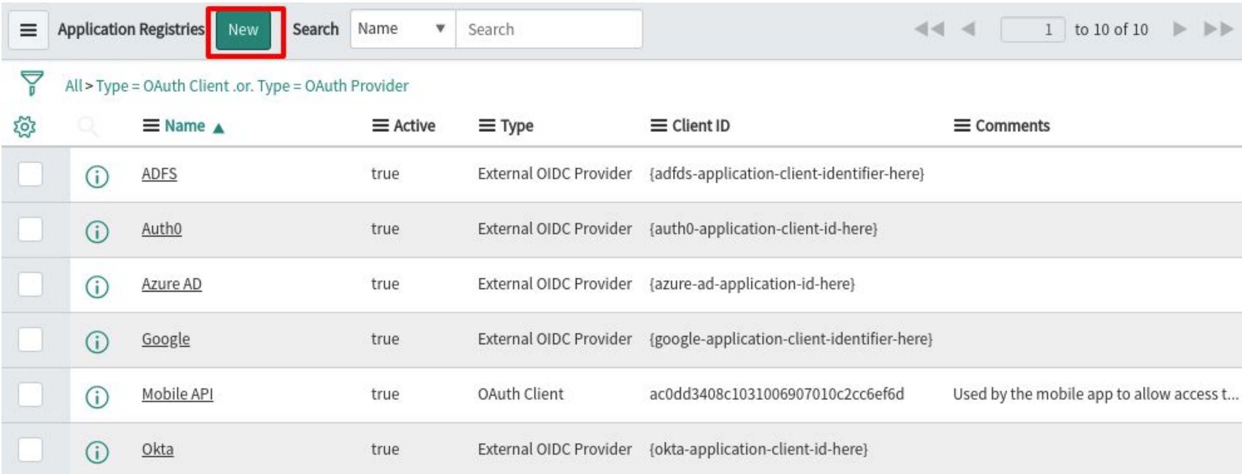
- ➢ ServiceNow account is required to configure this app.

Steps to create an App for authentication:

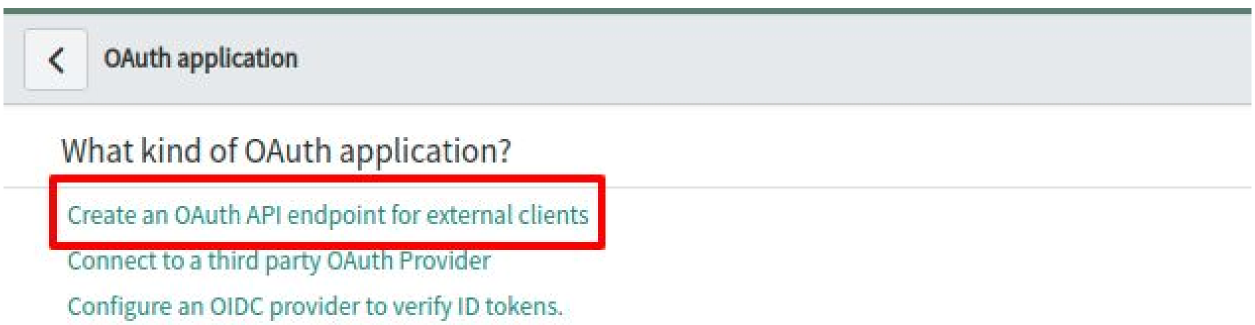
1. Enter the auth in search filter, then select Application Registry. Only System administrator can generate OAuth ClientId, Client Secret for authentication.



2. Click on New button.



3. Select the "Create an OAuth API endpoints for externalClients".

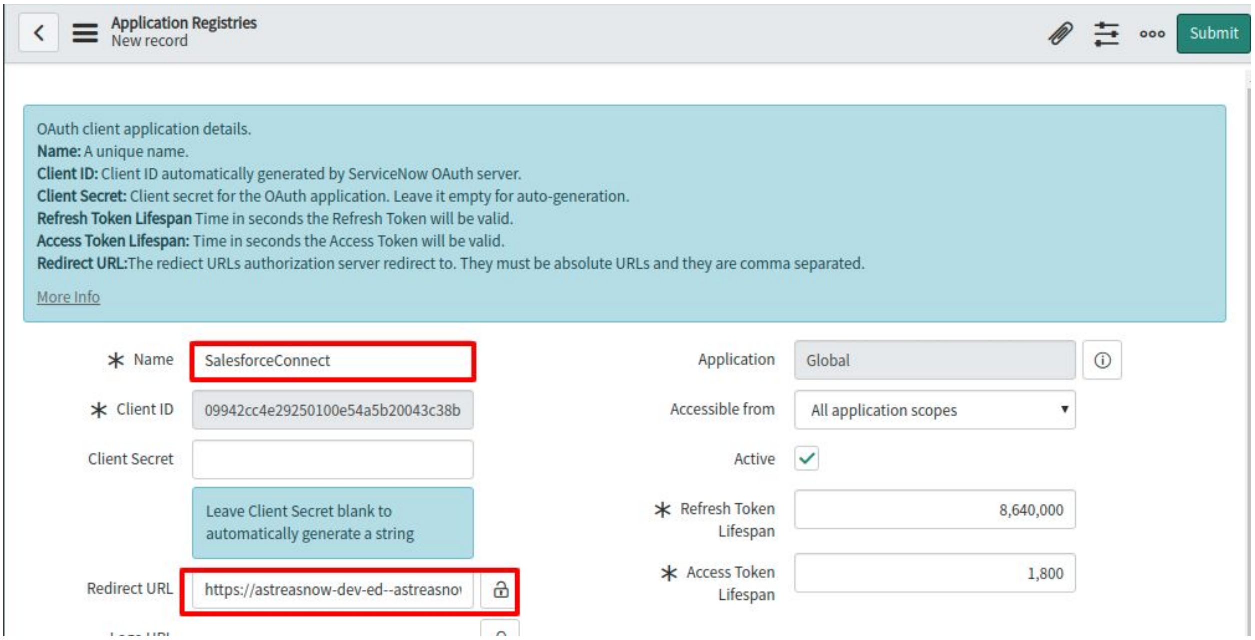


4. Enter the Name of OAuth API and Redirect URL in which Domain Name of the URL will be different.

Redirect URL Format : **https://YourSFDCDomain.ap5.visual.force.com/apex/AuthenticateSNOW**

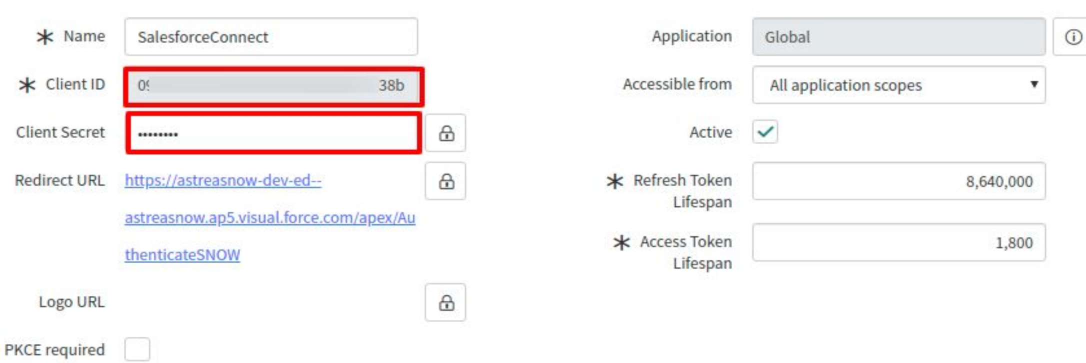
*********** To find the correct Redirect URL, follow below steps :**

A. Go To "SNOW Configuration" tab in Salesforce B. Copy the URL under heading "Redirect URL to be saved in ServiceNow" and save in ServiceNow under Redirect URL.



5. Click on Submit button, then click on create OAuth client.

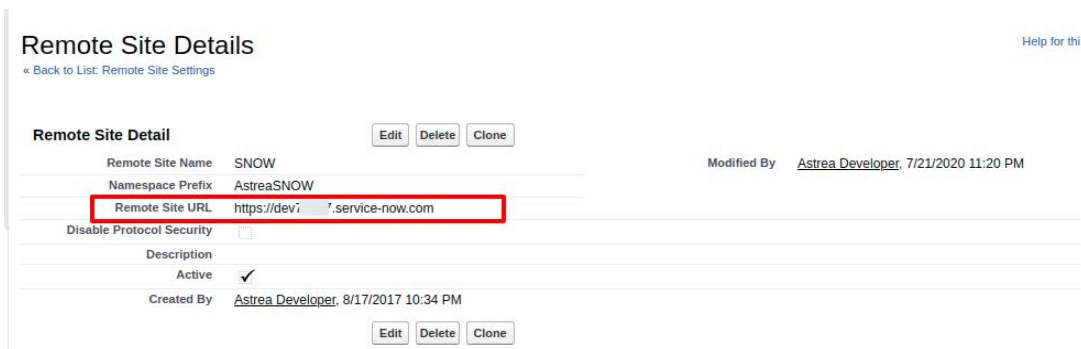
6. Copy the Client Id, Client Secret and ServiceNow InstanceName.



This app uses the ServiceNow instance URL so admin needs to add ServiceNow Instance URL in Remote Site Settings. Follow the below steps to add Remote Site Settings.

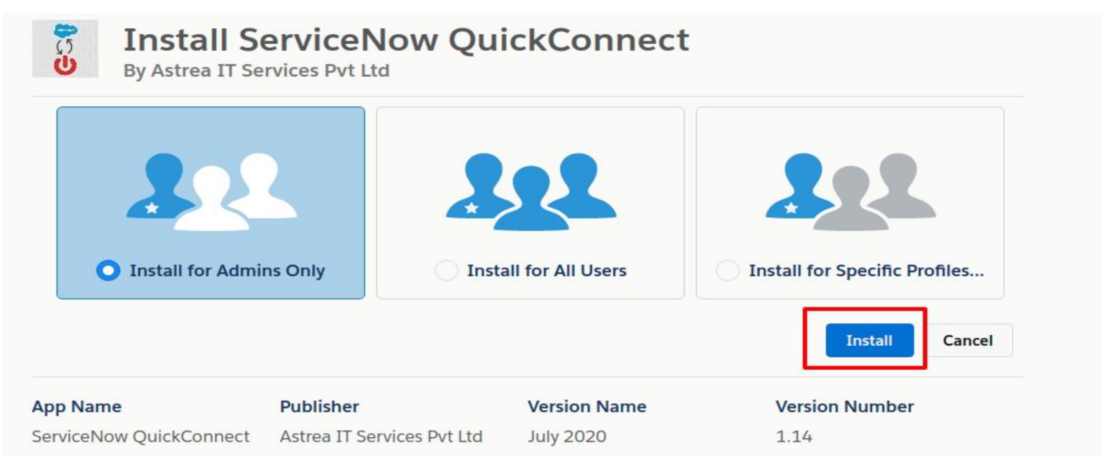
Steps: 1. Goto Setup > and Administer > Security Controls > RemoteSite Settings.

2. Add ServiceNow Instance URL (https://dev17xxx.service-now.com/).



ii) End UserSettings:

First user need to install the app from the Salesforce AppExchange.



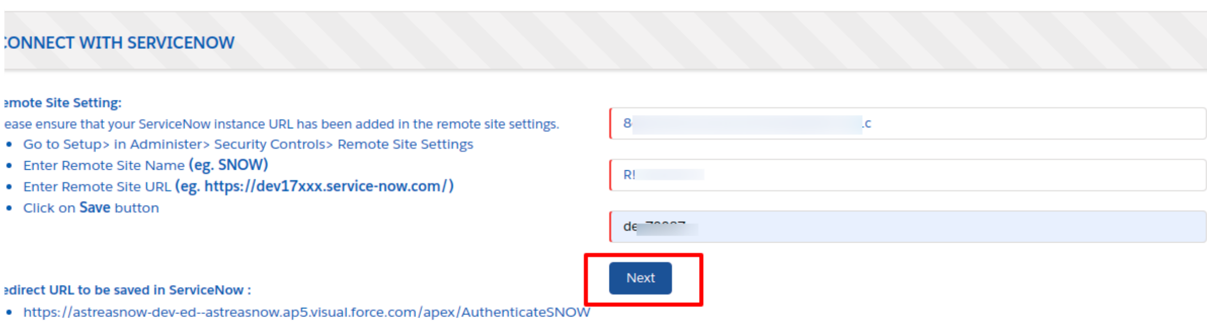
To confirm that the app is installed properly or not in the user org, User can check in our org by search in Quick Find/ Search for Installed Packages and screen will look like this.

Uninstall	ServiceNow QuickConnect	Astrea IT Services	1.14	AstreaSNOW	Active	Unlimited	0	Does not Expire
	Description ServiceNow QuickConnect by Astrea IT Services							

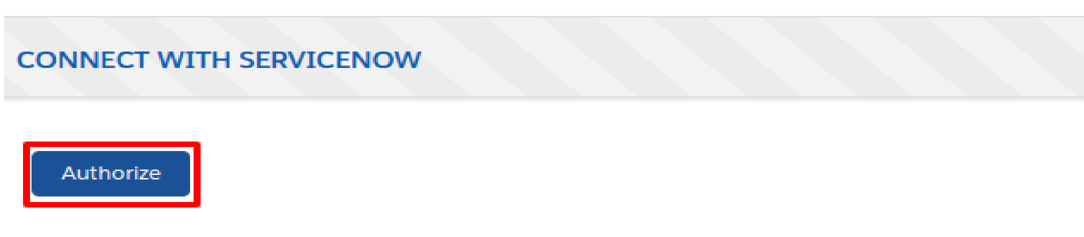
User needs to go to "SNOW Configuration" tab.

a. Enter Client Id, Client Secret and ServiceNow Instance name (eg.dev17xxx).

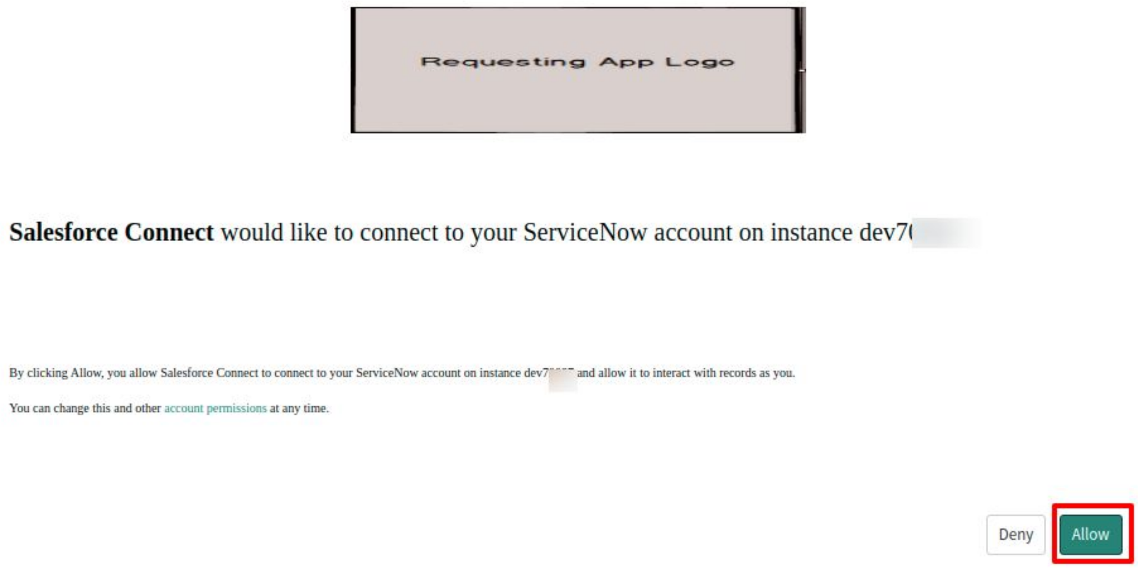
b.Click on the Next button.

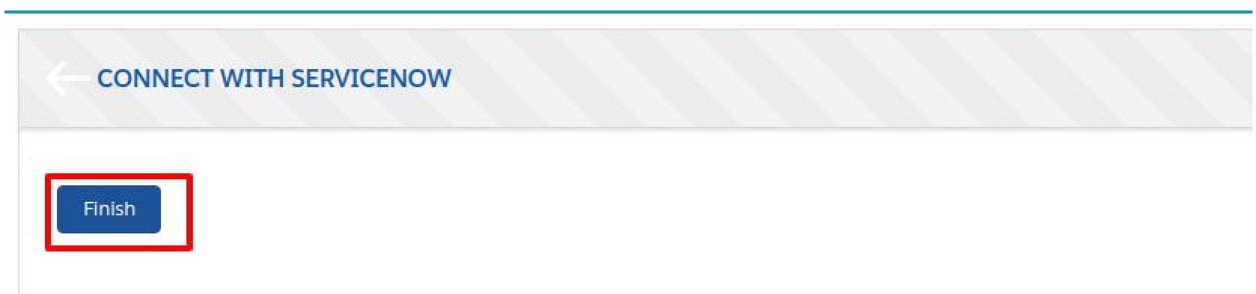


C. After clicking on Next button, an Authorize Button will be displayed (as shown in below screenshot) :

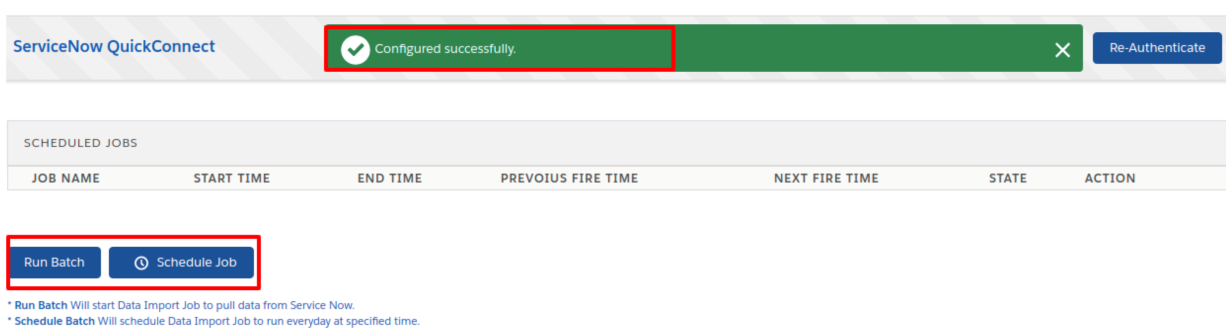


d. Click on Allow button, then user will see the Finish Button.





e. After Clicked on Finish button, a success message will display with Re-Authenticate, Run Batch and Schedule Buttons.



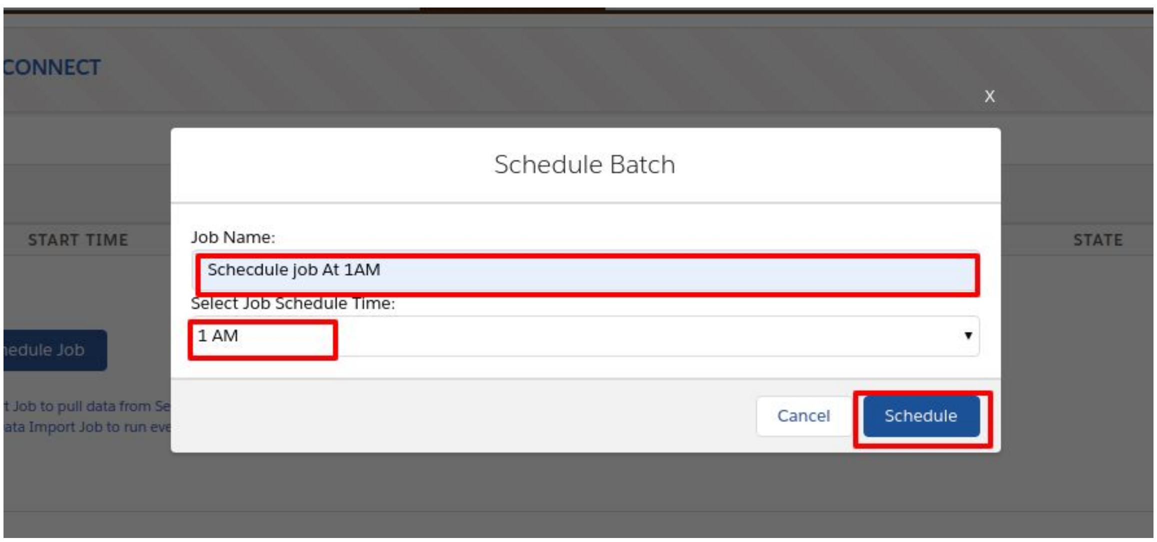
2. ServiceNow QuickConnect App Functionality

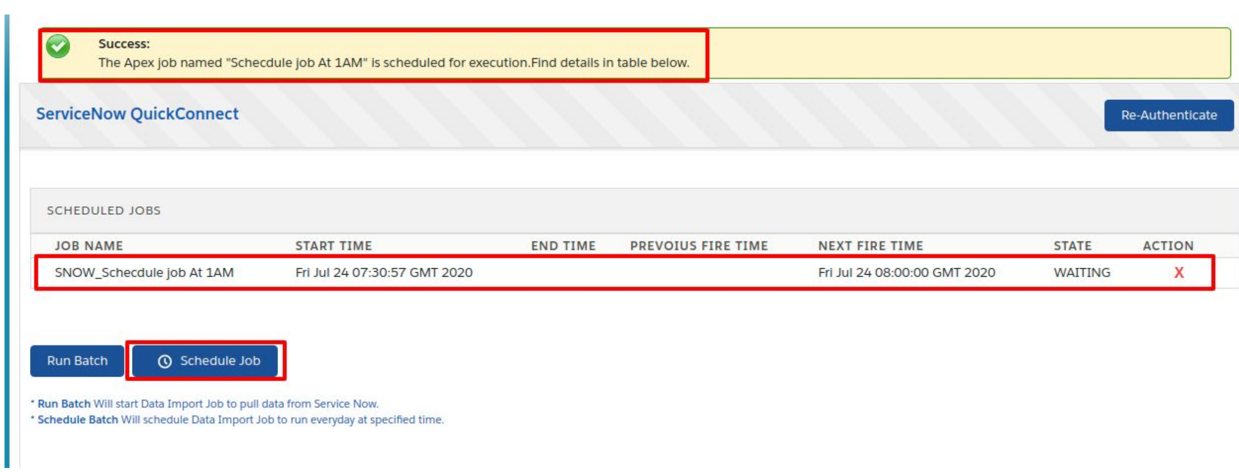
There are two buttons are available to get data from ServiceNow to

Salesforce that are “Run Batch” and “Schedule Batch”.

Every time user will click the Run Batch button, it will pulled data from

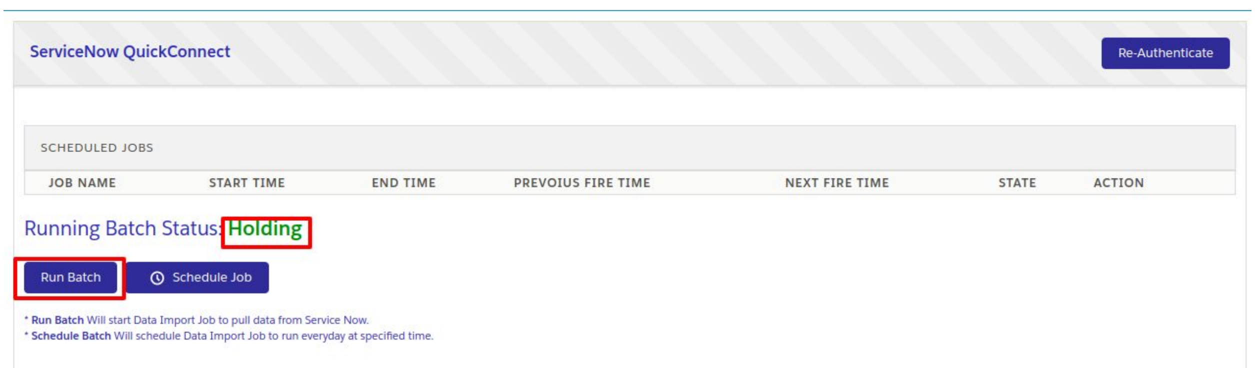
ServiceNow to Salesforce. When user click on the Schedule Batch button it will schedule a job everyday at specified time entered by user. A modal will display, here user can enter name of the job and time at which he/she wants to schedule the job (shown in the screenshot below).



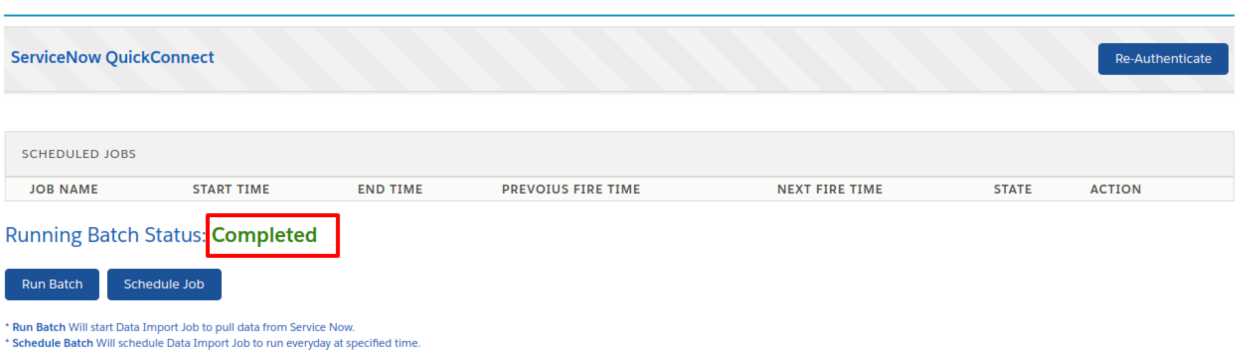


After job is scheduled successfully you can see details in ‘Scheduled Jobs’ table and can also see in salesforce interface.

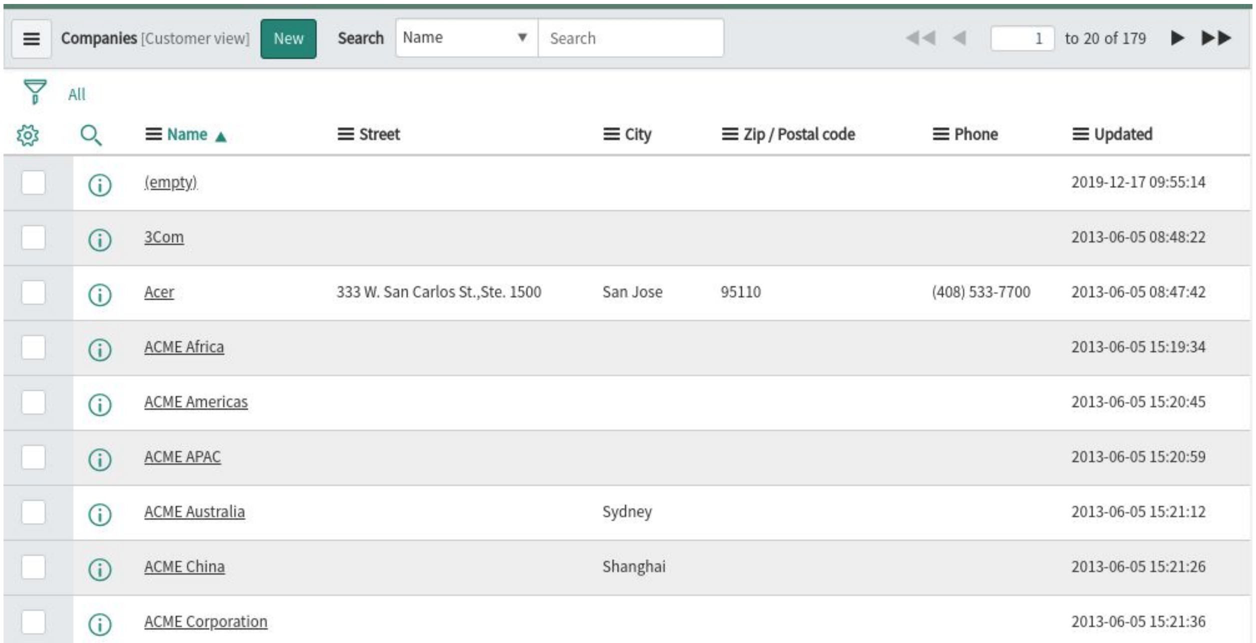
When user want to pull data from ServiceNow to Salesforce so for that user need to click on Run Batch button. User can see the Running Batch Status as shown in the below screenshot:



First the current running status of batch is Holding and after that is Completed. As shown in the screenshot below:



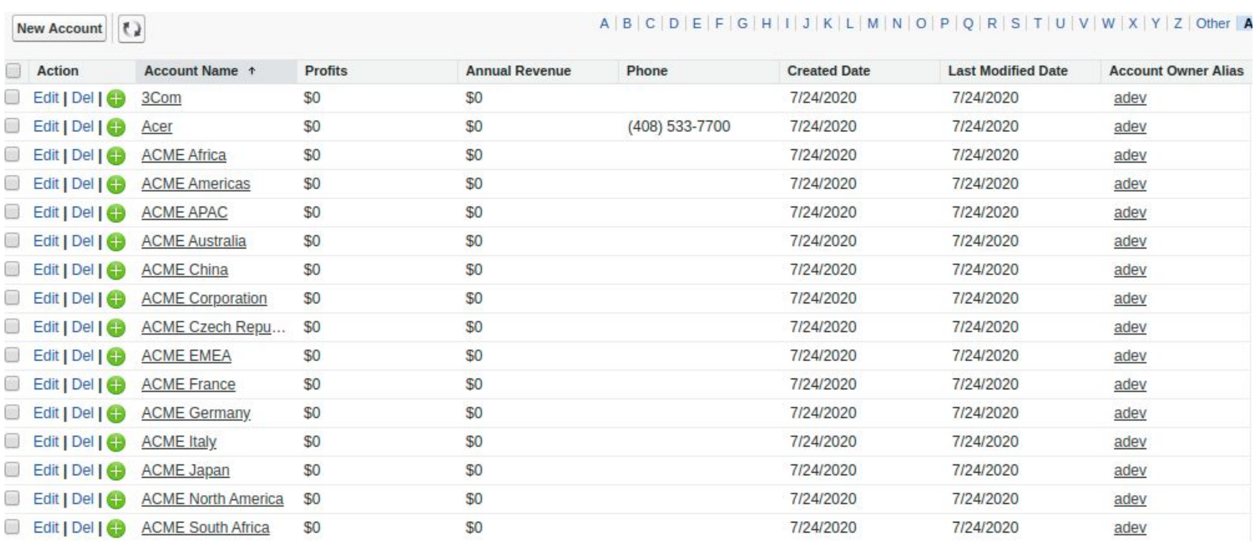
After running all Batch, app user can see that Company, User, Incident and Contract objects records of ServiceNow are synced withSalesforce. All the Company object record of ServiceNow are synced with Salesforce Account object, user can check the as shown in the image below:


Companies [Customer view] New Search Name Search 1 to 20 of 179

All

Name ▲	Street	City	Zip / Postal code	Phone	Updated
(empty)					2019-12-17 09:55:14
3Com					2013-06-05 08:48:22
Acer	333 W. San Carlos St.,Ste. 1500	San Jose	95110	(408) 533-7700	2013-06-05 08:47:42
ACME Africa					2013-06-05 15:19:34
ACME Americas					2013-06-05 15:20:45
ACME APAC					2013-06-05 15:20:59
ACME Australia		Sydney			2013-06-05 15:21:12
ACME China		Shanghai			2013-06-05 15:21:26
ACME Corporation					2013-06-05 15:21:36

In salesforce the company record are shown as in the image below:

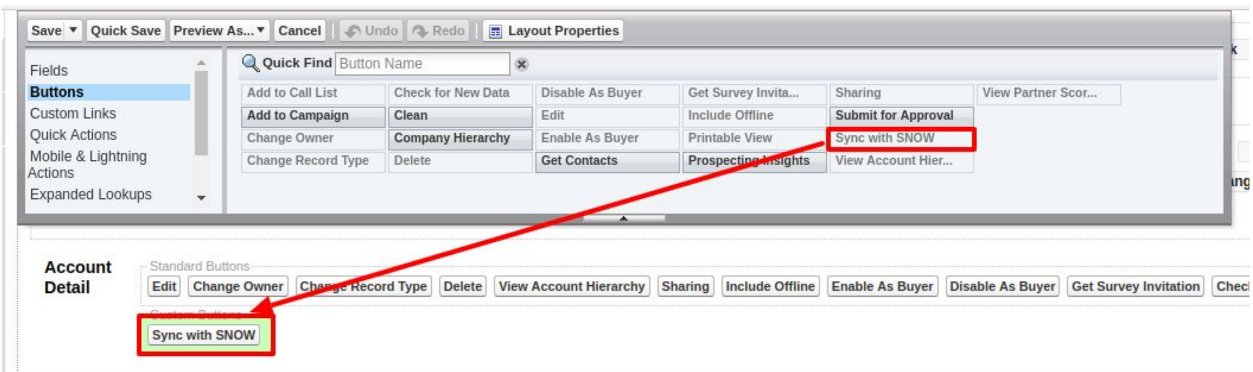

New Account

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | A

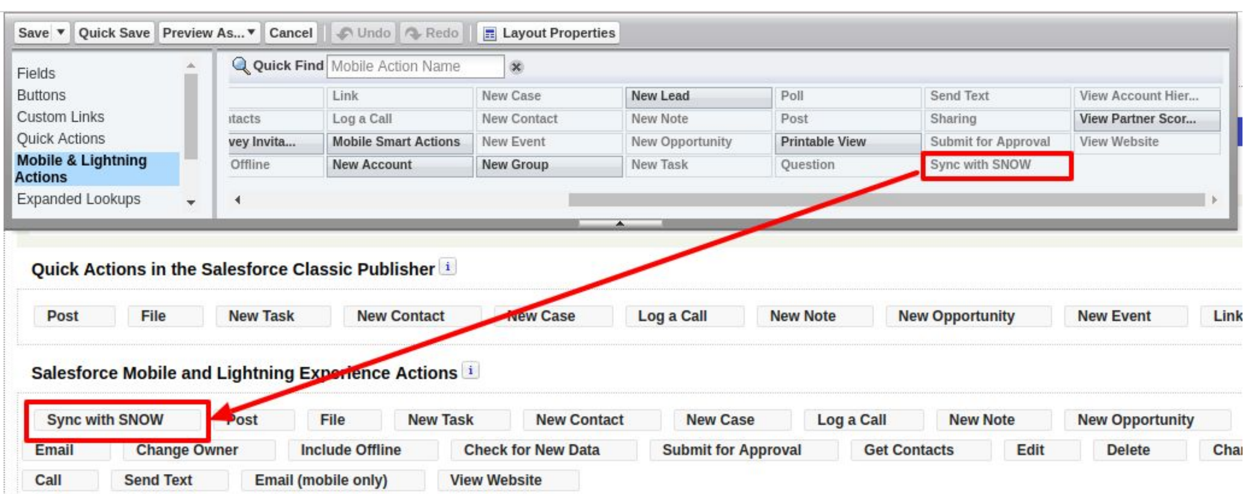
Action	Account Name ↑	Profits	Annual Revenue	Phone	Created Date	Last Modified Date	Account Owner Alias
Edit | Del |	3Com	$0	$0		7/24/2020	7/24/2020	adev
Edit | Del |	Acer	$0	$0	(408) 533-7700	7/24/2020	7/24/2020	adev
Edit | Del |	ACME Africa	$0	$0		7/24/2020	7/24/2020	adev
Edit | Del |	ACME Americas	$0	$0		7/24/2020	7/24/2020	adev
Edit | Del |	ACME APAC	$0	$0		7/24/2020	7/24/2020	adev
Edit | Del |	ACME Australia	$0	$0		7/24/2020	7/24/2020	adev
Edit | Del |	ACME China	$0	$0		7/24/2020	7/24/2020	adev
Edit | Del |	ACME Corporation	$0	$0		7/24/2020	7/24/2020	adev
Edit | Del |	ACME Czech Repu...	$0	$0		7/24/2020	7/24/2020	adev
Edit | Del |	ACME EMEA	$0	$0		7/24/2020	7/24/2020	adev
Edit | Del |	ACME France	$0	$0		7/24/2020	7/24/2020	adev
Edit | Del |	ACME Germany	$0	$0		7/24/2020	7/24/2020	adev
Edit | Del |	ACME Italy	$0	$0		7/24/2020	7/24/2020	adev
Edit | Del |	ACME Japan	$0	$0		7/24/2020	7/24/2020	adev
Edit | Del |	ACME North America	$0	$0		7/24/2020	7/24/2020	adev
Edit | Del |	ACME South Africa	$0	$0		7/24/2020	7/24/2020	adev

4. To create a Company object in ServiceNow from Salesforce account object. User need to add a custom button on account detail page from account page layouts. As shown in the below image. Add button to detail page for objects (Account, Contact, Case and Contract) from page layouts.

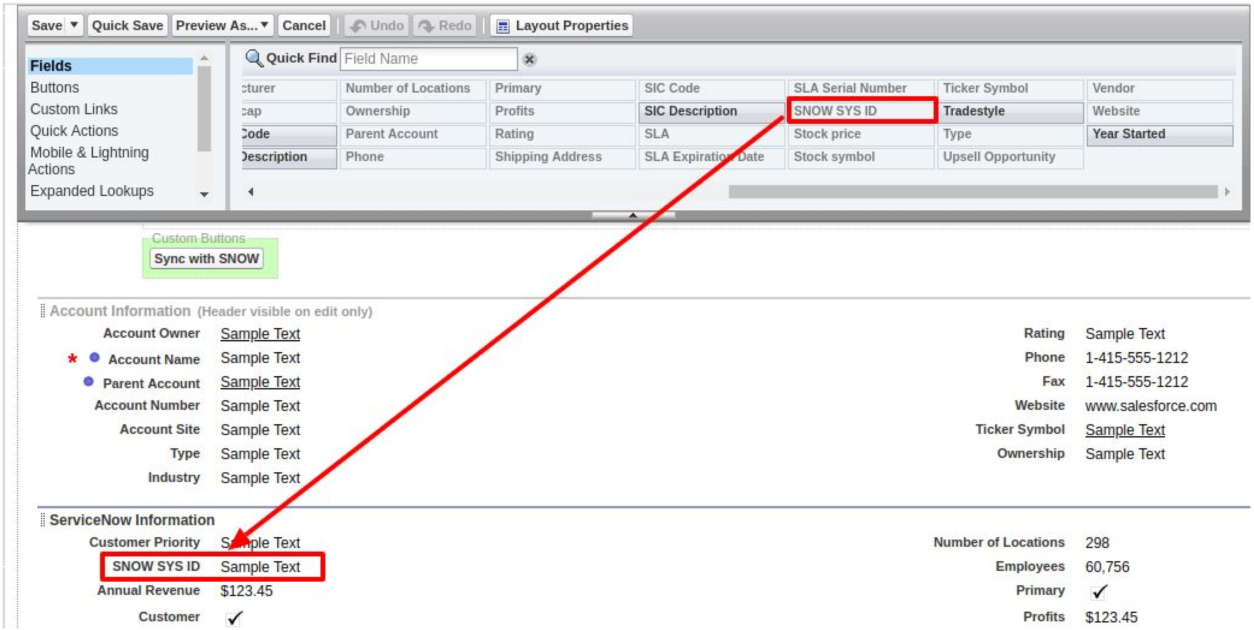
In Salesforce classic view:



In Salesforce1 and Lightning Experience Actions:

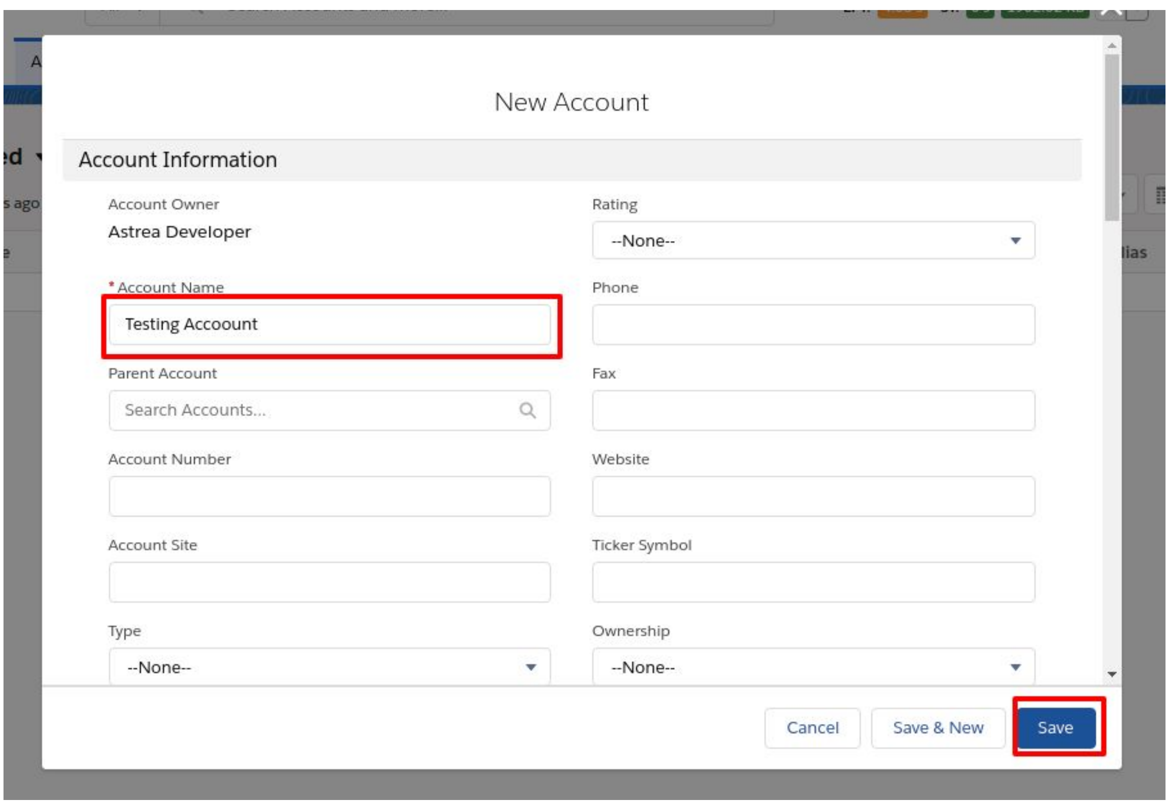


User also need to add ServiceNow related custom field inSalesforce from object page layout to object detail page.

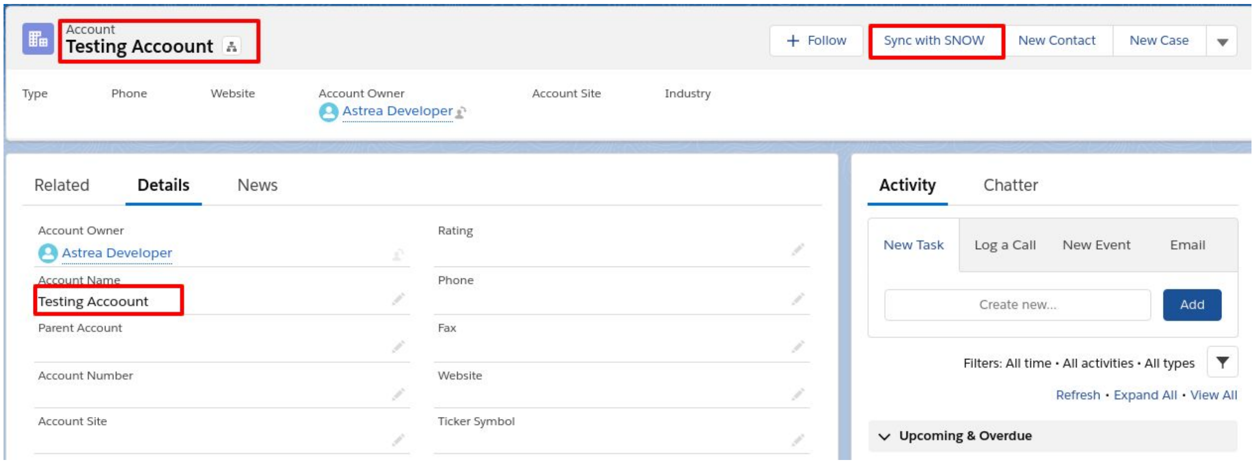


End of the document a object field specific tables shows, the list of related field between ServiceNow and Salesforce.

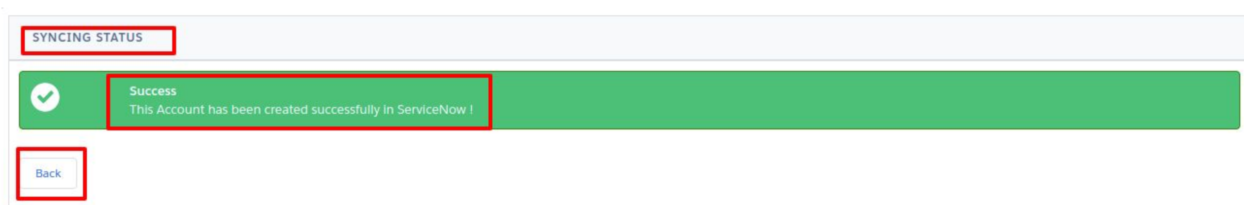
After adding the field to detail page, create new account in salesforce. Then all the details accordingly and click on "Save" button.



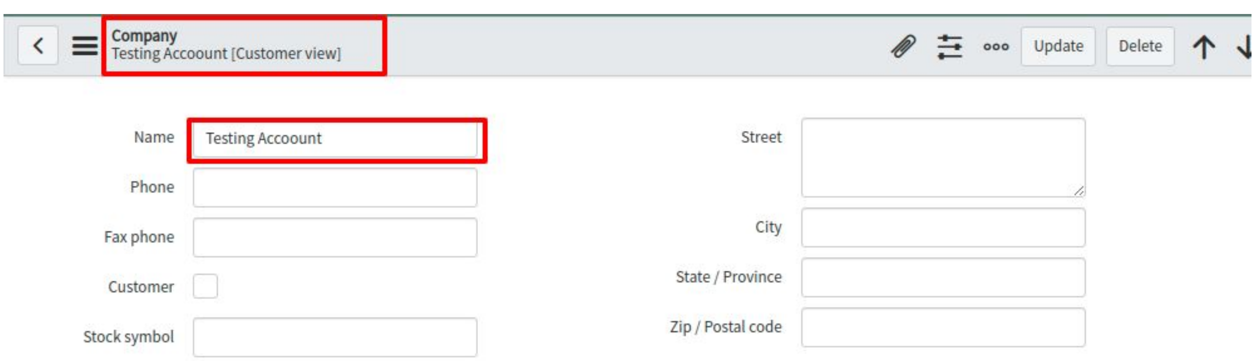
When account is created successfully in Salesforce then go to detail page of this account and click on the “sync with SNOW” button.



When you click on the button a new page will display and this page shows the status of your syncing. If this account is exist on ServiceNow then update the existing record otherwise create new company record in ServiceNow. And then press back Button.



After getting success message on this page you can check in ServiceNow a new company record has been created successfully. As shown in image below.



Objects and Fields Mapping, Related to ServiceNowQuickConnect APP

ServiceNow QuickConnect App Included following objects and fields:

Related Objects:

Salesforce SObjects	ServiceNow Objects
Account	Company
Contact	User
Case	Incident
Contract	Contract

Object Related Fields

1. Salesforce Account object related field in ServiceNow.

Salesforce(Account object)	⇔	ServiceNow(Company)
Name	⇔	name
Phone	⇔	phone
Website	⇔	website
Fax	⇔	fax_phone
AnnualRevenue	⇔	revenue_per_year
NumberOfEmployees	⇔	num_employees

Description	⇔	notes
BillingCity	⇔	city
BillingStreet	⇔	street
BillingCountry	⇔	Country
BillingPostalCode	⇔	Zip
SNOW_SYS_ID	⇔	sys_id
BillingLatitude	⇔	latitude
BillingLongitude	⇔	longitude
ShippingStreet	⇔	street
ShippingCity	⇔	city
ShippingState	⇔	state
ShippingCountry	⇔	country
ShippingPostalCode	⇔	zip
ShippingLatitude	⇔	latitude
ShippingLongitude	⇔	longitude
Vendor__c	⇔	vendor
Stock_Price__c	⇔	stock_price
Profits__c	⇔	profits
Primary__c	⇔	primary
Customer__c	⇔	company
Market_ cap__c	⇔	market_cap
Stock_Symbol__c	⇔	stock_symbol
Manufacturer_c	⇔	manufacturer
Fiscal_year_c	⇔	fiscal_year

2. Salesforce Contact object related field in ServiceNow.

Salesforce(Contactobject)	⇔	ServiceNow(User)
LastName	⇔	last_name
FirstName	⇔	first_name
Email	⇔	email
Phone	⇔	Business_phone
MailingCity	⇔	city
MailingStreet	⇔	street
MailingState	⇔	state
MailingCountry	⇔	country
MailingPostalCode	⇔	zip
Gender__c	⇔	gender
Languages__c	⇔	Language
City__c	⇔	city
Country_code__c	⇔	country
Date_format__c	⇔	date_format
Employee_number__c	⇔	employee_number
Last_login__c	⇔	last_login
Last_login_time__c	⇔	last_login_time
Title	⇔	title
Middle_name__c	⇔	middle_name
Time_format__c	⇔	time_format
Time_zone__c	⇔	time_zone

SNOW_SYS_ID__c	⇔	sys_id
AccountId (Account Lookup)	⇔	Company

3. Salesforce Contract object related field in ServiceNow.

Salesforce(Contract Object)	⇔	Salesforce(Contract Object)
SNOW_SYS_ID__c	⇔	SNOW_SYS_ID
Description	⇔	Description
Short_description__c	⇔	short_description
StartDate	⇔	starts
Ends__c	⇔	ends
TC__c	⇔	terms_and_conditions
State__c	⇔	state
Active__c	⇔	active
Cost_per_unit__c	⇔	cost_per_unit
Created__c	⇔	sys_created_on
Discount__c	⇔	discount
License_type__c	⇔	License_type
Number__c	⇔	number
Options__c	⇔	options
Payment_amount__c	⇔	payment_amount
PO_Number__c	⇔	po_Number
Process__c	⇔	Process
Total_cost__c	⇔	total_cost

Updated_by__c	⇔	sys_updated_by
Vendor_account__c	⇔	vendor_account
Yearly_cost__c	⇔	yearly_cost

4. Salesforce Case object related field in ServiceNow.

Salesforce(Case Object)	⇔	ServiceNow(Incident)
Active__c	⇔	active
Activity_due__c	⇔	activity_due
Actual_end__c	⇔	work_end
Actual_start__c	⇔	work_start
Business_duration__c	⇔	business_duration
Business_resolve_time__c	⇔	business_stc
Category__c	⇔	category
Child_Incidents__c	⇔	child_incidents
Close_code__c	⇔	close_code
Closed__c	⇔	closed_at
Close_notes__c(Deprecated)	⇔	close_notes
Contact_type__c	⇔	contact_type
Due_date	⇔	due_date
Escalation	⇔	escalation
Excepted_start	⇔	excepted_start
Follow_up	⇔	follow_up
Impact	⇔	impact
Incident_state	⇔	incident_state

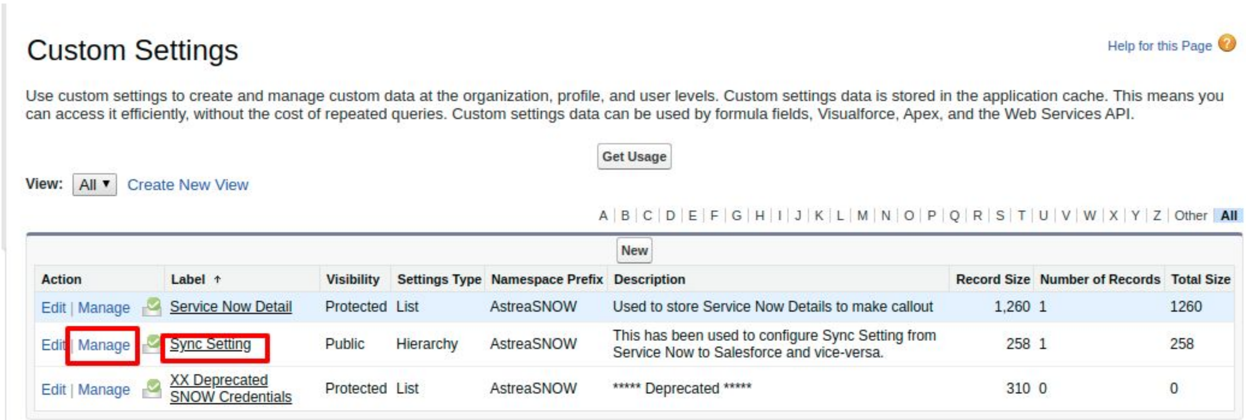
Priority	⇔	priority
Reassignment_count__c	⇔	reassignment_count
Reopen_count__c	⇔	reopen_count
Short_description__c	⇔	short_description
SLA_due__c	⇔	sla_due
SNOW_SYS_ID__c	⇔	sys_id
State__c	⇔	state
Subcategory__c	⇔	subcategory
Updated__c	⇔	sys_updated_on
Upon_approval__c	⇔	upon_approval
Upon_reject__c	⇔	upon_reject
Incident_URL__c	⇔	Custom Created Field
Description	⇔	description
AccountId(Account Lookup on Case)	⇔	company
ContactId(Contact Lookup on Case)	⇔	caller_id
SNOW_Close_Notes__c	⇔	close_notes
Incident_Creation_Timestamp__c	⇔	sys_created_on
Assigned_To__c	⇔	assigned_to

Additional Setting In ServiceNow QuickConnectApp

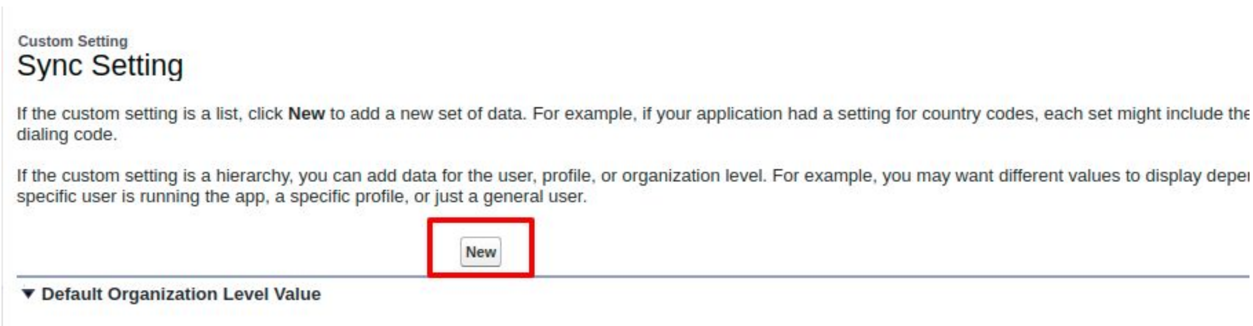
We created a Custom Setting named ‘Sync Setting’ to give additional facility to the User.

Steps to get custom setting.

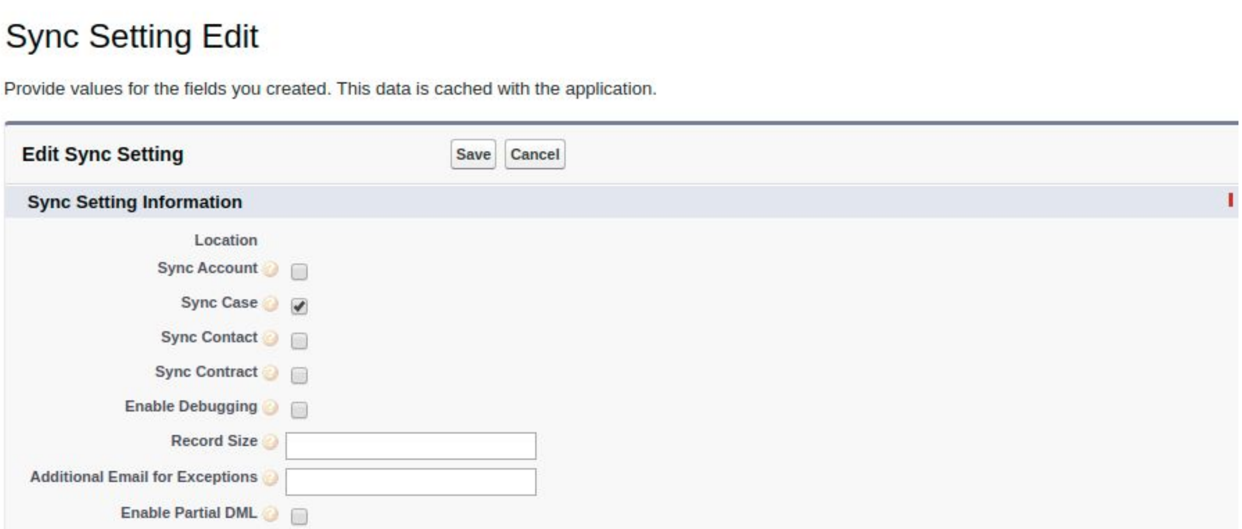
Goto SetUp > Write ‘Custom Setting’ in Quick Find Box > Click on ‘Manage’ on ‘Sync Setting’



Then Click on New Button of Default Organization Level Value



Here are some fields



Sync Account, Sync Case, Sync Contact and Sync Contract checkbox will give flexibility of Object syncing to user, Which ever checkbox will be checked by user only those record will be synced between Salesforce to ServiceNow and Vice versa. (**Note:-** the current version of App Support all Object Syncing , Checking of these fields will not work, If user wants this feature then we can make it customizable for them.)

Additional Email for Exception and Enable Debugging fields works together,
User can enter their email address in Additional Email for Exception field, and check Enable Debugging Checkbox, After doing this If there will be any error then user will get a detailed error description Email.

If any Access or Permission level Error then User can read the Error and resolve on its Own. and If somehow User is unable to resolve the issue then we would be happy to resolve the issue facing by user.

In Record Size field, User can enter number of records He/She wants to get from Servicenow at a time. Maximum Record Size allowed is **400.**

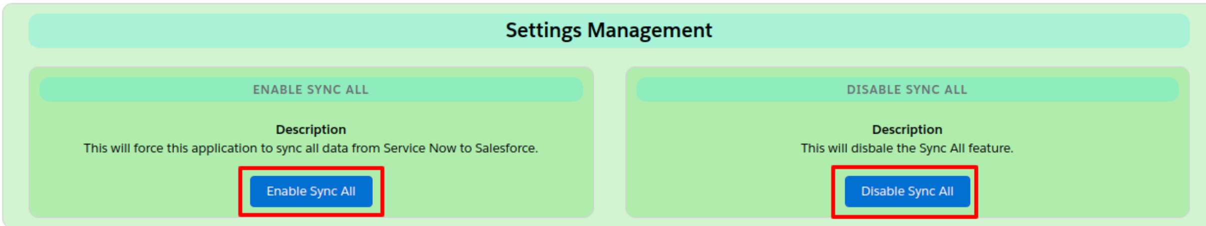
Leave Enable Partial Debugging field as blank. It is for future purpose.

Setting Management Tab

When User Run the batch for the first time, it will get all the records from ServiceNow to Salesforce and when User press run the batch for second time or further it will only fetch newly created or Updated records.

If user wants all the records from ServiceNow when he/she press Run batch button for second time the he/She can do this Using Setting Management Tab

There are two Buttons in this tab Enable All Sync and Disable All Sync



When User Press Enable All Sync Button it will enable setting to get all the record from Servicenow to Salesforce when user press Run batch Button.

When User Press Disable All Sync Button it will Disable setting to all the records from ServiceNow it will only fetch newly created or Updated records.