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# Salesforce Service Cloud

Salesforce Service Cloud Synchronization PowerPack Version 1.0.0

Salesforce Service Cloud: Synchronization Policies PowerPack Version 100

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# Chapter

# 1

## Introduction to the Salesforce Service Cloud Synchronization PowerPack

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### Overview

This chapter describes how you can use the *Salesforce Service Cloud Synchronization PowerPack* to automatically synchronize Salesforce cases or incidents and SL1 events between your Salesforce and SL1 systems. The integration is bidirectional between SL1 and Salesforce.

**NOTE:** After the 2.1.0 platform release, the *Integration Service* was rebranded as *SL1 PowerFlow*, and the *Automation Builder* was rebranded as *SL1 PowerFlow builder*.

**NOTE:** The label "SyncPack" is used in place of "Synchronization PowerPack" in the PowerFlow user interface.

This chapter covers the following topics:

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<a href="#">Installing the Synchronization PowerPack</a> .....	5

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### Prerequisites for this Synchronization PowerPack

This Synchronization PowerPack requires the following:

- A subscription that includes Incident/Notification Workflow Automations
- *Base Steps Synchronization PowerPack* version 1.3.2 or later
- *SL1 Base Notifications Synchronization PowerPack* version 1.0.1 or later
- A Salesforce Developer account

The following table lists the port access required by PowerFlow and this Synchronization PowerPack:

Source IP	PowerFlow Destination	PowerFlow Source Port	Destination Port	Requirement
PowerFlow	SL1 API	Any	TCP 443	SL1 API Access
PowerFlow	Salesforce API	Any	TCP 443	Salesforce API Access
PowerFlow	SL1 Database	Any	TCP 7706	SL1 Database Access

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## Contents of the Synchronization PowerPack

This section lists the contents of the *Salesforce Service Cloud Synchronization PowerPack*.

### PowerFlow Applications

- ***Bulk Resolve SL1 Events From Salesforce Cases***. This application resolves SL1 events that were resolved by corresponding Salesforce cases.
- ***Bulk Resolve SL1 Events From Salesforce Incidents***. This application resolves SL1 events that were resolved by corresponding Salesforce incidents.
- ***Create Salesforce Case***. This application collects event information from SL1 and creates a case in Salesforce.
- ***Create Salesforce Incident***. This application collects event information from SL1 and creates an incident in Salesforce.
- ***Get Acknowledged Salesforce Cases And Update SL1 Event***. This application collects acknowledged case data from Salesforce and updates the corresponding SL1 event.
- ***Get Acknowledged Salesforce Incidents and Update SL1 Event***. This application collects acknowledged incident data from Salesforce and updates the corresponding SL1 event.
- ***Pass Acknowledgment Details From SL1 To Salesforce Case***. This application collects acknowledged event data from SL1 and updates the corresponding Salesforce case.
- ***Pass Acknowledgment Details From SL1 to Salesforce Incident***. This application collects acknowledged event data from SL1 and updates the corresponding Salesforce incidents.
- ***Resolve Salesforce Case***. This application resolves Salesforce cases that were resolved by corresponding SL1 events.
- ***Resolve Salesforce Incident***. This application resolves Salesforce incidents that were resolved by corresponding SL1 events.

For more information about how to configure these applications, see [Configuring Applications for the Salesforce Service Cloud Synchronization PowerPack](#).

## Configuration Object

- **Base Salesforce Configuration.** This configuration object can be used as a template after the Synchronization PowerPack is installed on the PowerFlow system. The configuration object includes the following:
  - Details for connecting to SL1, including the host, username, and password.
  - Details for connecting to Salesforce, including the client ID, client secret, username, and password.
  - Details for adding connecting events and cases or incidents between SL1 and Salesforce, including options to populate the external URL, define the default acknowledging user, and resolving an SL1 event from Salesforce.
  - Details for customizing templates.

## Steps

The following steps are included in this Synchronization PowerPack:

- Create Bulk SL1 Payloads Including SF Email
- Fetch Cases From Salesforce
- Fetch Incidents From Salesforce
- Fetch Resolved Cases From Salesforce
- Fetch Resolved Incidents From Salesforce
- Get Event Details And Create Salesforce Case
- Get Event Details And Create Salesforce Incident
- Pass Acknowledgment From SL1 to Salesforce Case
- Pass Acknowledgment From SL1 to Salesforce Incident
- Pass Case Resolution From SL1 to Salesforce
- Pass Resolution From SL1 To Salesforce
- Post Event Update to SL1

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## Installing the Synchronization PowerPack

A Synchronization PowerPack file has the **.whl** file extension type. You can download the Synchronization PowerPack file from the ScienceLogic Support site.

## Downloading the Synchronization PowerPack

To locate and download the Synchronization PowerPack:

1. Go to the [ScienceLogic Support Site](#).
2. Click the **[Product Downloads]** tab and select *PowerPacks*.
3. In the **Search PowerPacks** field, search for this Synchronization PowerPack and select it from the search results. The **Release Version** page appears.
4. On the **[PowerPack Versions]** tab, click the name of the Synchronization PowerPack version that you want to install. The **Release File Details** page appears.
5. Click the **[Download File]** button or click the name of the **.zip** file containing the **.whl** file for this Synchronization PowerPack to start downloading the file.

**NOTE:** After you download a Synchronization PowerPack, you can import it to your PowerFlow system using the PowerFlow user interface.

**NOTE:** If you are installing or upgrading to the latest version of this Synchronization PowerPack in an offline deployment, see "Installing or Upgrading in an Offline Environment" in the Synchronization PowerPack release notes to ensure you install any external dependencies.

## Importing the Synchronization PowerPack

To import a Synchronization PowerPack in the PowerFlow user interface:

1. On the **SyncPacks** page of the PowerFlow user interface, click **[Import SyncPack]**. The **Import SyncPack** page appears.
2. Click **[Browse]** and select the **.whl** file for the Synchronization PowerPack you want to install.


**TIP:** You can also drag and drop a **.whl** file to the **Import SyncPack** page.

3. Click **[Import]**. PowerFlow registers and uploads the Synchronization PowerPack. The Synchronization PowerPack is added to the **SyncPacks** page.


**NOTE:** You cannot edit the content package in a Synchronization PowerPack published by ScienceLogic. You must make a copy of a ScienceLogic Synchronization PowerPack and save your changes to the new Synchronization PowerPack to prevent overwriting any information in the original Synchronization PowerPack when upgrading.






# Installing the Synchronization PowerPack

To activate and install a Synchronization PowerPack in the PowerFlow user interface:

1. On the **SyncPacks** page of the PowerFlow user interface, click the **[Actions]** button (  ) for the Synchronization PowerPack you want to install and select *Activate & Install*. The **Activate & Install SyncPack** modal appears.

**NOTE:** If you try to activate and install a Synchronization PowerPack that is already activated and installed, you can choose to "force" installation across all the nodes in the PowerFlow system.

**TIP:** If you do not see the PowerPack that you want to install, click the Filter icon (  ) on the **SyncPacks** page and select *Toggle Inactive SyncPacks* to see a list of the imported PowerPacks.

2. Click **[Yes]** to confirm the activation and installation. When the Synchronization PowerPack is activated, the **SyncPacks** page displays a green check mark icon (  ) for that Synchronization PowerPack. If the activation or installation failed, then a red exclamation mark icon (  ) appears.
3. For more information about the activation and installation process, click the check mark icon (  ) or the exclamation mark icon (  ) in the **Activated** column for that Synchronization PowerPack. For a successful installation, the "Activate & Install SyncPack" application appears, and you can view the Step Log for the steps. For a failed installation, the **Error Logs** window appears.
4. If you have other versions of the same Synchronization PowerPack on your PowerFlow system, you can click the **[Actions]** button (  ) for that Synchronization PowerPack and select *Change active version* to activate a different version other than the version that is currently running.

## Configuring Applications for the Salesforce Service Cloud Synchronization PowerPack

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### Overview

This chapter describes how to set up the PowerFlow applications for the *Salesforce Service Cloud Synchronization PowerPack*.


This chapter covers the following topics:

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## Creating and Aligning a Configuration Object in PowerFlow

A **configuration object** supplies the login credentials and other required information needed to execute the steps for a PowerFlow application. The **Configurations** page (  ) of the PowerFlow user interface lists all available configuration objects for that system.

You can create as many configuration objects as you need. A PowerFlow application can only use one configuration object at a time, but you can use (or "align") the same configuration object with multiple applications.

To use this Synchronization PowerPack, you will need to use an existing configuration object in the PowerFlow user interface or create a new configuration object. Next, you need to align that configuration object to the relevant applications.

### Prerequisites for Creating a Configuration Object

To integrate Salesforce and SL1, you must create or use an existing application for SL1 to communicate with. When creating or editing the Salesforce application, ensure that *OAuth Settings* are enabled and add the following **OAuth Scopes**:

- Access Lightning applications (lightning)
- Access Visualforce applications (visualforce)
- Access content resources (content)
- Manage user data via APIs (api)
- Perform requests at any time (refresh\_token, offline\_access)

### Creating a Configuration Object

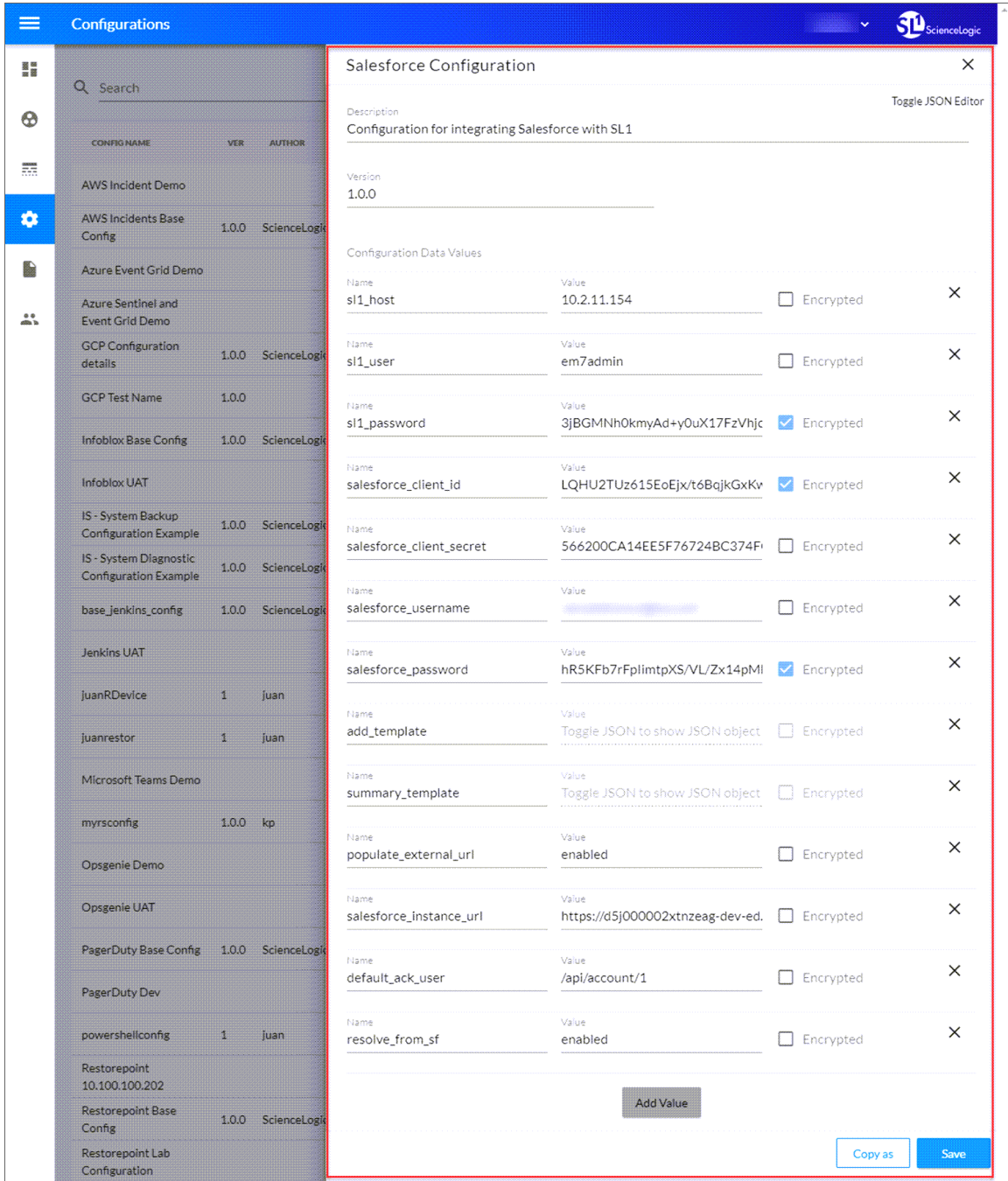
For this Synchronization PowerPack, you can make a copy of the "Base Salesforce Configuration" configuration object, which is the sample configuration file that was installed with the *Salesforce Service Cloud Synchronization* PowerPack.

**TIP:** The "Base Salesforce Configuration" configuration object contains all of the required variables. Simply update the variables from that object to match your SL1 and Salesforce settings.

**NOTE:** For more information about the Salesforce terms and concepts in this section, see the Salesforce documentation.

To create a configuration object based on the "Base Salesforce Configuration" configuration object:

1. In the PowerFlow user interface, go to the **Configurations** page (⚙️).
2. Click the **[Actions]** button (⋮) for the "Base Salesforce Configuration" configuration object and select *Edit*. The **Configuration** pane appears:




3. Click **[Copy as]**. The **Create Configuration** pane appears.
4. Complete the following fields:
  - **Friendly Name**. Type a name for the configuration object that will display on the **Configurations** page.
  - **Description**. Type a brief description of the configuration object.
  - **Author**. Type the user or organization that created the configuration object.
  - **Version**. Type a version of the configuration object.
5. In the **Configuration Data** field, update the default variable definitions to match your PowerFlow configuration:
  - **sl1\_host**. Type the hostname or IP address of your SL1 system.
  - **sl1\_user**. Type the username for your SL1 system.
  - **sl1\_password**. Type the password for your SL1 system.
  - **salesforce\_client\_id**. Type the consumer key for your Salesforce application.
  - **salesforce\_client\_secret**. Type the consumer secret for your Salesforce application.
  - **salesforce\_username**. Type the username for your Salesforce system.
  - **salesforce\_password**. Type the password for your Salesforce system.
  - **add\_template**. Toggle the JSON editor to define the template to translate SL1 event information to the subject of the Salesforce case or incident.
  - **summary\_template**. Toggle the JSON editor to define the template to translate SL1 event information to the description of the Salesforce case or incident.
  - **populate\_external\_url**. The option to add a Salesforce case or incident URL to the corresponding SL1 event. The default value is 'enabled'.
  - **salesforce\_instance\_url**. Type the URL for your Salesforce system.
  - **default\_ack\_user**. Type the API command for the default user to acknowledge Salesforce cases or incidents.
  - **resolve\_from\_sf**. The option to allow SL1 events to be resolved if they are resolved in Salesforce. The default value is 'enabled'.
9. Click **[Save]**. You can now align this configuration object with one or more applications.

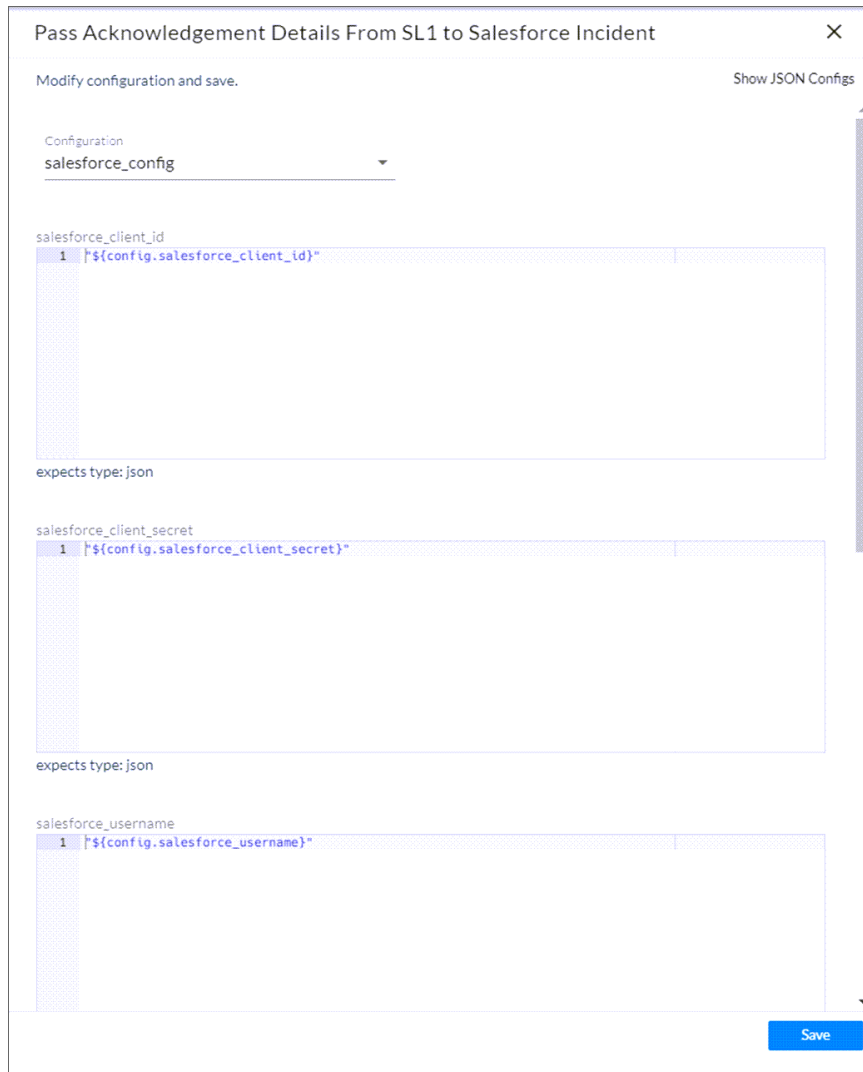
## Aligning a Configuration Object and Configuring PowerFlow Applications

With this Synchronization PowerPack, any status changes made to an SL1 event is sent to Salesforce to update the corresponding case or incident. Any status changes to the Salesforce case or incident are synchronized back to the corresponding SL1 event. You will need to align the Salesforce applications with the relevant configuration object in PowerFlow, and, if needed, update any other fields on the **Configuration** pane for the applications.

To run this Synchronization PowerPack, you must "align" the configuration object to run with the PowerFlow applications included in this Synchronization PowerPack.

To align the configuration object with the relevant PowerFlow applications:

1. On the **Applications** page of the PowerFlow user interface, open one of the PowerFlow applications listed above and click **[Configure]** . The **Configurations** pane for that application appears:



Pass Acknowledgement Details From SL1 to Salesforce Incident

Modify configuration and save. Show JSON Configs

Configuration  
salesforce\_config

salesforce\_client\_id  
1 | "\${config.salesforce\_client\_id}"  
expects type: json

salesforce\_client\_secret  
1 | "\${config.salesforce\_client\_secret}"  
expects type: json

salesforce\_username  
1 | "\${config.salesforce\_username}"

Save

- From the **Configurations** drop-down, select the configuration object you want to use.

**NOTE:** The values for **salesforce\_client\_id** and the other parameters that appear in the **Configuration** pane with a padlock icon (🔒) are populated by the configuration object you aligned with the application. Do not modify these values. If you encounter an error, make sure your configuration object is configured properly.

- Click **[Save]** to align that configuration with the application.
- Repeat this process for the other PowerFlow applications.

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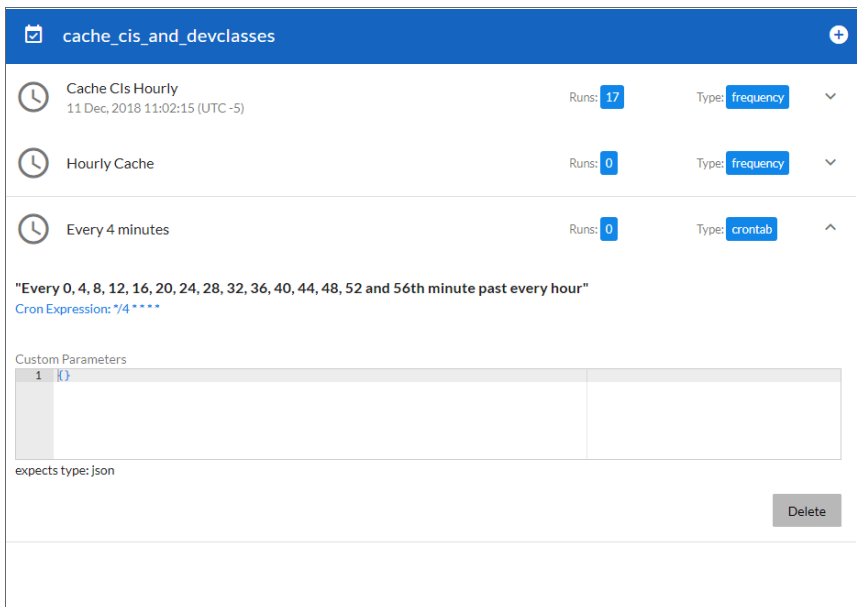
## Scheduling PowerFlow Applications

To trigger the applications in the Synchronization PowerPack, you must schedule the applications included in the Synchronization PowerPack.

You can create one or more schedules for a single application in the PowerFlow user interface. When creating each schedule, you can specify the queue and the configuration file for that application.

To schedule an application:

- On the **Applications** page (🏠), click the **[Schedule]** button for the application you want to schedule. The **Schedule** window appears, displaying any existing schedules for that application:



**NOTE:** If you set up a schedule using a cron expression, the details of that schedule display in a more readable format in this list. For example, if you set up a cron expression of `*/4 * * * *`, the schedule on this window includes the cron expression along with an explanation of that expression: "Every 0, 4, 8, 12, 16, 20, 24, 28, 32, 36, 40, 44, 48, 52, and 56th minute past every hour".

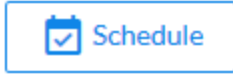
2. Select a schedule from the list to view the details for that schedule.
3. Click the + icon to create a schedule. A blank **Schedule** window appears:

The screenshot shows a 'Schedule' window with the following fields and controls:

- Schedule Name:** A text input field.
- Switch to Cron Expression:** A toggle switch.
- Frequency:** A text input field with a unit dropdown set to 'secs'.
- Custom Parameters:** A table with 3 rows and 2 columns. The first row contains '1', '[]'. The second row contains '2', '()'. The third row contains '3', '}'. Below the table, it says 'expects type: json'.
- Save Schedule:** A blue button at the bottom right.


4. In the **Schedule** window, complete the following fields:
  - **Schedule Name.** Type a name for the schedule.
  - **Switch to.** Use this toggle to switch between a cron expression and setting the frequency in seconds.
    - **Cron expression.** Select this option to schedule the application using a cron expression. If you select this option, you can create complicated schedules based on minutes, hours, the day of the month, the month, and the day of the week. As you update the cron expression, the **Schedule** window displays the results of the expression in more readable language, such as *Expression: "Every 0 and 30th minute past every hour on the 1 and 31st of every month", based on `*/30 * * /30 * *`.*
    - **Frequency in seconds.** Type the number of seconds per interval that you want to run the application.
  - **Custom Parameters.** Type any JSON parameters you want to use for this schedule, such as information about a configuration file or mappings.

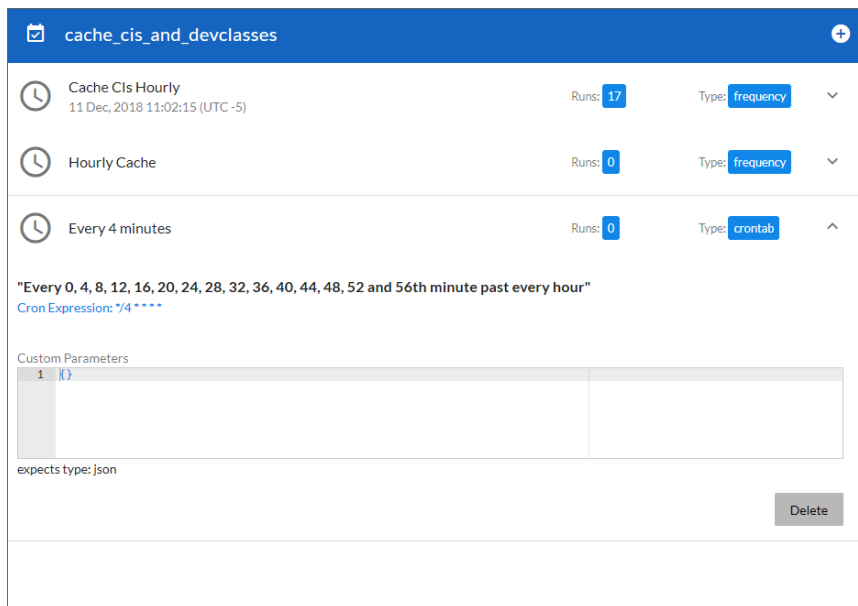
5. Click **[Save Schedule]**. The schedule is added to the list of schedules on the initial **Schedule** window. Also, on the **Applications** page, the word "Scheduled" appears in the **Scheduled** column for this application, and the **[Schedule]** button contains a check mark:



**NOTE:** After you create a schedule, it continues to run until you delete it. Also, you cannot edit an existing schedule, but you can delete it and create a similar schedule if needed.

To view or delete an existing schedule:

1. On the **Applications** page, click the **[Schedule]** button for the application that contains a schedule you want to delete. The **Schedule** window appears.
2. Click the down arrow icon (  ) to view the details of an existing schedule:



3. To delete the selected schedule, click **[Delete]**. The schedule is removed.

**NOTE:** When either multiple SL1 instances or multiple Salesforce instances are involved with PowerFlow, you should create an individual configuration object for each SL1 or Salesforce instance. Next, create an individual schedule for each configuration object. Each schedule should use a configuration object that is specific to that single SL1 or Salesforce instance. Creating copies of a PowerFlow application from a Synchronization PowerPack for the purpose of distinguishing between domains is not supported, and will result in issues on upgrades.

## Introduction to the Salesforce Service Cloud: Synchronization Policies PowerPack

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### Overview

This chapter describes how to install the *Salesforce Service Cloud: Synchronization Policies PowerPack*.

This PowerPack requires a subscription that includes CMDB/Inventory Workflow Automations.

This chapter covers the following topics:

<a href="#">What is the Salesforce Service Cloud: Synchronization Policies PowerPack?</a> .....	17
<a href="#">Installing the Salesforce Service Cloud: Synchronization Policies PowerPack</a> .....	17



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# What is the Salesforce Service Cloud: Synchronization Policies PowerPack?

The *Salesforce Service Cloud: Synchronization Policies* PowerPack includes Run Book Automation and Action policies that can be used to trigger, acknowledge, and resolve Salesforce cases or incidents and SL1 events.

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## Installing the Salesforce Service Cloud: Synchronization Policies PowerPack

Before completing the steps in this manual, you must import and install the latest version of the *Salesforce Service Cloud: Synchronization Policies* PowerPack.

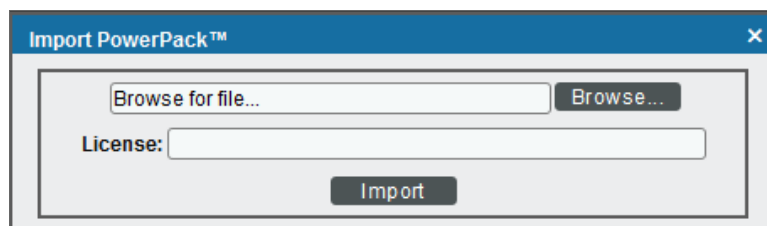
**WARNING:** You must install and configure the *Salesforce Service Cloud Synchronization* PowerPack version 1.0.0 before using the *Salesforce Service Cloud: Synchronization Policies* PowerPack.

**NOTE:** The *Salesforce Service Cloud: Synchronization Policies* PowerPack requires SL1 version 10.2.0 or later. For details on upgrading SL1, see the appropriate SL1 [Release Notes](#).

**TIP:** By default, installing a new version of a PowerPack overwrites all content from a previous version of that PowerPack that has already been installed on the target system. You can use the **Enable Selective PowerPack Field Protection** setting in the **Behavior Settings** page (System > Settings > Behavior) to prevent new PowerPacks from overwriting local changes for some commonly customized fields. (For more information, see the **System Administration** manual.)

To download and install a PowerPack:

1. Download the PowerPack from the [ScienceLogic Support Site](#).
2. Go to the **PowerPack Manager** page (System > Manage > PowerPacks).
3. In the **PowerPack Manager** page, click the **[Actions]** button, then select *Import PowerPack*.
4. The **Import PowerPack** dialog box appears:



5. Click the **[Browse]** button and navigate to the PowerPack file.
6. When the **PowerPack Installer** modal appears, click the **[Install]** button to install the PowerPack.

**NOTE:** If you exit the **PowerPack Installer** modal without installing the imported PowerPack, the imported PowerPack will not appear in the **PowerPack Manager** page. However, the imported PowerPack will appear in the **Imported PowerPacks** modal. This page appears when you click the **[Actions]** menu and select *Install PowerPack*.

## Configuring Automation Action Credentials

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### Overview

This chapter describes how to configure the credential required by the automation actions in the *Salesforce Service Cloud: Synchronization Policies PowerPack*.

This chapter covers the following topics:

<a href="#">Creating a SOAP/XML Credential to Access SL1 PowerFlow</a> .....	20
<a href="#">Creating a SOAP/XML Credential to Access SL1 PowerFlow in the Classic User Interface</a> .....	21

# Creating a SOAP/XML Credential to Access SL1 PowerFlow

After you have integrated your Salesforce and PowerFlow systems, you must create a SOAP/XML credential so that the automation actions included in the PowerPack can access your PowerFlow system. The *Salesforce Service Cloud: Synchronization Policies* PowerPack includes a template for a SOAP/XML credential that you can edit for use with your PowerFlow system.

**NOTE:** If you are on an SL1 system prior to version 11.1.0, you will not be able to duplicate the sample credential. It is recommended that you create your new credentials using [the SL1 classic user interface](#) so you do not overwrite the sample credential(s).

To create a SOAP/XML credential:

1. Go to the **Credentials** page (Manage > Credentials).
2. Locate the "PowerFlow SF Service Cloud" sample credential, click its **[Actions]** icon (⋮), and then select **Duplicate**. A copy of the credential, called **PowerFlow SF Service Cloud copy** appears.

The screenshot shows the 'Edit Credential' form for a credential named 'PowerFlow SF Service Cloud copy'. The form is titled 'Edit Credential' and has a 'Credential Tester' button in the top right corner. The form is divided into several sections:

- All Organizations:** A toggle switch is turned on (blue), and a dropdown menu shows 'Select the organizations the credential belongs to'.
- Organization:** A dropdown menu shows 'PowerFlow SF Service Cloud'.
- URL:** A text input field is empty.
- HTTP Auth User:** A text input field contains 'HTTP Auth Password'.
- HTTP Auth Password:** A text input field contains 'HTTPAuth'.
- Phone Hostname/IP:** A text input field contains 'Phone Hostname (optional)'. Below it is a note: 'Phone Hostname (optional)'. There is also a 'Phone Port' field with a note: 'Phone Port (optional)'. There is a 'Phone Password' field.
- Embedded Password (URL):** A text input field contains 'Embedded Value (URL)'. There are two more 'Embedded Value (URL)' fields.
- HTTP Headers:** A section with an 'Add Header' button and a note: 'Click to Add Header (Optional)'. There is a close button (X).
- OAuth Options:** A section with an 'Add OAuth Option' button and a note: 'Add OAuth Option (Optional)'. There is a close button (X).

At the bottom right, there is a 'Save & Test' button and a 'View & Close' button.

3. Supply values in the following fields:
  - **Name.** Type a new name for the credential.
  - **All Organizations.** Toggle on (blue) to align the credential to all organizations, or toggle off (gray) and then select one or more specific organizations from the **What organization manages this service?** drop-down field to align the credential with those specific organizations.
  - **URL.** Type the URL for your PowerFlow system.
  - **HTTP Auth User.** Type the username for your PowerFlow system.
  - **HTTP Auth Password.** Type the password for your PowerFlow system.

4. Click **[Save & Close]**.
5. SL1 assigns the credential an ID number. Take note of the ID number for the new credential on the **Credentials** page, in the **ID** column. You will need the ID number when editing the input parameters of the automation actions included in the *Salesforce Service Cloud: Synchronization Policies PowerPack*.

## Creating a SOAP/XML Credential to Access SL1 PowerFlow in the Classic User Interface

To define a SOAP/XML credential using the example credential:

1. Go to the **Credential Management** page (System > Manage > Credentials).
2. Click the wrench icon (🔧) for the **PowerFlow SF Service Cloud** credential. The **Credential Editor** modal window appears:

The screenshot shows the 'Credential Editor [290]' window. The title bar reads 'Edit SOAP/XML Credential #290'. There are 'New' and 'Reset' buttons in the top right. The main area is divided into several sections:

- Basic Settings:** Includes fields for Profile Name (PowerFlow SF Service Cloud), Content Encoding ([text/xml]), Method ([POST]), and HTTP Version ([HTTP/1.1]). Below these is a URL field with a placeholder: 'URL [ http(s)://Host.Port/Path | %D = Aligned Device Address | %N = Aligned Device Host Name ]'. At the bottom of this section are fields for HTTP Auth User (isadmin), HTTP Auth Password (masked with asterisks), and Timeout (seconds) (5).
- Proxy Settings:** Includes fields for Hostname/IP, Port (0), and User.
- CURL Options:** A list of options on the left (CAINFO, CAPATH, CLOSEPOLICY, CONNECTTIMEOUT, COOKIE, COOKIEFILE, COOKIEJAR, COOKIELIST, CRLF, CUSTOMREQUEST, DNSCACHETIMEOUT) with arrows pointing to a large empty text area on the right.
- Soap Options:** Includes an Embedded Password [%P] field and four Embed Value [%1] through [%4] fields.
- HTTP Headers:** A section with a '+ Add a header' link.

At the bottom of the window are 'Save' and 'Save As' buttons.

3. Supply values in the following fields:
  - **Profile Name.** Type a new name for the credential.
  - **URL.** Type the URL for your SL1 PowerFlow system.
  - **HTTP Auth User.** Type the username for your SL1 PowerFlow user account.
  - **HTTP Auth Password.** Type the password for your SL1 PowerFlow user account.

4. Click the **[Save As]** button to save the new SOAP/XML credential.
5. SL1 assigns the credential an ID number. Take note of the ID number that appears in the **Credential Editor** heading, as you will need this when editing the input parameters of the automation actions included in the *Salesforce Service Cloud: Synchronization Policies* PowerPack.

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# Chapter

# 5

## **Configuring the Salesforce Service Cloud: Synchronization Policies Run Book Action Policies**

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### Overview

This chapter describes how to edit the Run Book Action policies included in the *Salesforce Service Cloud: Synchronization Policies* PowerPack so that the action policies can communicate with your SL1 PowerFlow system.

This chapter covers the following topics:

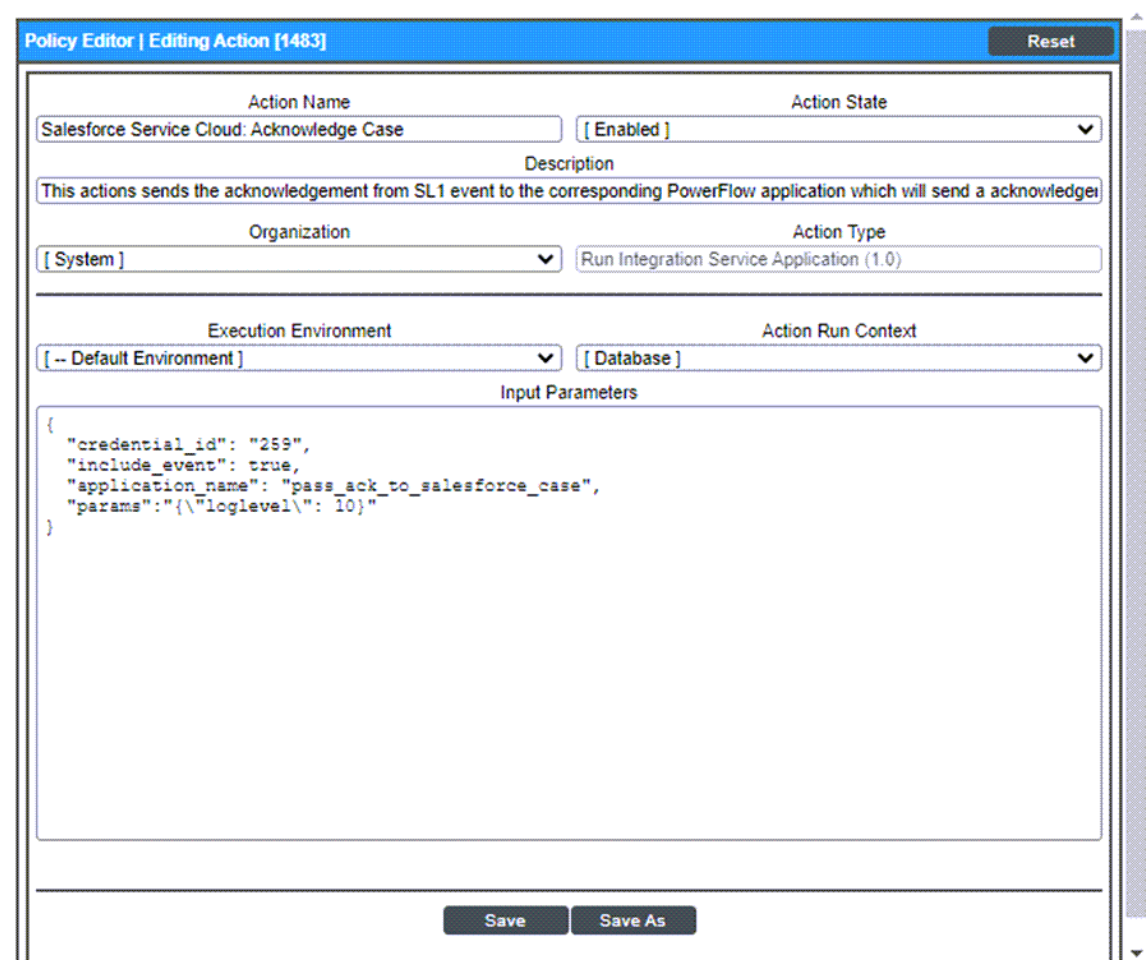
[Editing the Salesforce Service Cloud: Synchronization Policies Action Policies](#) .....24

## Editing the Salesforce Service Cloud: Synchronization Policies Action Policies

The *Salesforce Service Cloud: Synchronization Policies* PowerPack includes six action policies that use the "Run Integration Service Application" action type to trigger the PowerFlow application that sends and receives data to Salesforce Service Cloud: Synchronization Policies. You can specify the credential ID in a JSON structure that you enter in the **Input Parameters** field in the **Action Policy Editor** modal.

To edit the action policies included in the PowerPack:

1. Go to the **Action Policy Manager** page (Registry > Run Book > Actions).
2. Locate the action policy that you want to use, and then click its wrench icon (🔧). The **Editing Action** page appears:



The screenshot shows the "Policy Editor | Editing Action [1483]" modal. It features a "Reset" button in the top right corner. The form is organized into several sections:

- Action Name:** "Salesforce Service Cloud: Acknowledge Case"
- Action State:** "[ Enabled ]" (dropdown menu)
- Description:** "This actions sends the acknowledgement from SL1 event to the corresponding PowerFlow application which will send a acknowledge"
- Organization:** "[ System ]" (dropdown menu)
- Action Type:** "Run Integration Service Application (1.0)"
- Execution Environment:** "[ -- Default Environment ]" (dropdown menu)
- Action Run Context:** "[ Database ]" (dropdown menu)
- Input Parameters:** A text area containing a JSON object:

```
{
  "credential_id": "259",
  "include_event": true,
  "application_name": "pass_ack_to_salesforce_case",
  "params":{"loglevel\": 10}"
}
```

At the bottom of the modal, there are "Save" and "Save As" buttons.

3. In the **Input Parameters** field, change the values of the following parameters:



- **credential\_id**. Change the value to the credential ID that you noted earlier when [creating a credential for your PowerFlow system](#). This parameter is required.
- **include\_event**. Leave the value as "true".
- **application\_name**. Leave the default application value.
- **params**. Leave the default parameter value.

4. Click **[Save]**.

---

# Chapter

# 6

## **Salesforce Service Cloud: Synchronization Policies Run Book Automation Policies**

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### Overview

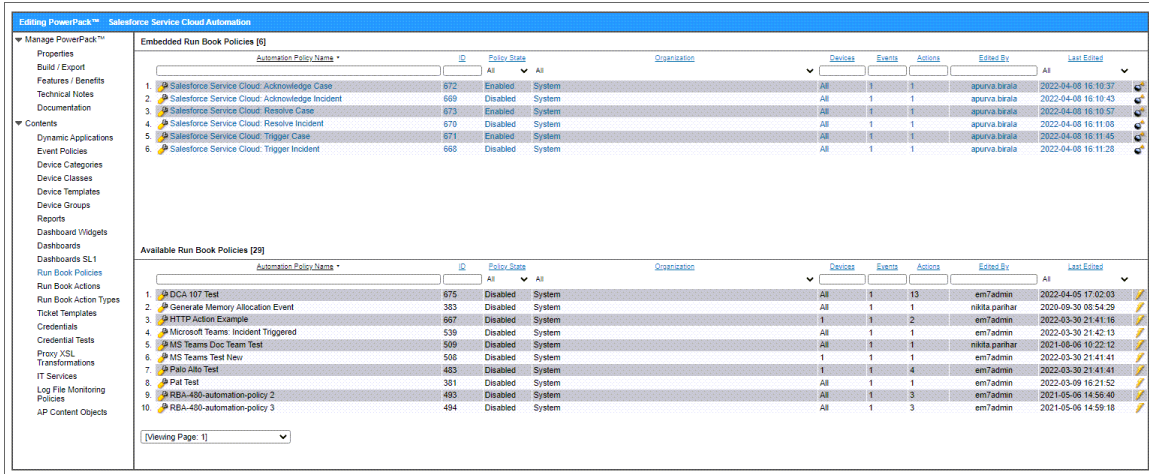
This chapter describes the Run Book Automation policies found in the *Salesforce Service Cloud: Synchronization Policies* PowerPack.

This chapter covers the following topics:

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# Standard Automation Policies

The *Salesforce Service Cloud: Synchronization Policies* PowerPack includes six standard automation policies that you can enable, shown in the following figure.



These policies update the Salesforce case or incident with the state of the event in SL1.

When an event is detected in SL1, a case or incident is triggered in Salesforce. When an event is acknowledged in SL1, the associated case or incident is updated in Salesforce. When an event is resolved in SL1, the associated case or incident is resolved in Salesforce.

The following table shows the automation policy, its default aligned events, and the automation action that runs in response to the events.

Automation Policy Name	Aligned Events	Automation Action
Salesforce Service Cloud: Acknowledge Case	All events	Salesforce Service Cloud: Acknowledge Case
Salesforce Service Cloud: Acknowledge Incident	All events	Salesforce Service Cloud: Acknowledge Incident
Salesforce Service Cloud: Resolve Case	All events	Salesforce Service Cloud: Resolve Case
Salesforce Service Cloud: Resolve Incident	All events	Salesforce Service Cloud: Resolve Incident
Salesforce Service Cloud: Trigger Case	All events	Salesforce Service Cloud: Trigger Case
Salesforce Service Cloud: Trigger Incident	All events	Salesforce Service Cloud: Trigger Incident

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