



Salesforce Service Cloud SyncPack

Version 1.0.0

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Chapter

1

Introduction to the Salesforce Service Cloud SyncPack

Overview

This chapter describes how you can use the "Salesforce Service Cloud" SyncPack to automatically synchronize Salesforce cases or incidents and SL1 events between Salesforce and SL1 . The integration is bidirectional between SL1 and Salesforce.

This SyncPack uses the "Salesforce Service Cloud: Synchronization Policies" PowerPack.

This chapter covers the following topics:

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What Can I Do with this SyncPack?

The "Salesforce Service Cloud" SyncPack lets you automatically synchronize Salesforce cases or incidents and SL1 events between Salesforce and SL1. The integration is bidirectional between SL1 and Salesforce.

You can configure this SyncPack to perform the following integrations:

- Resolve (or bulk resolve) an SL1 event when the synced Salesforce case or incident is resolved.
- Acknowledge an SL1 event when the synced Salesforce case or incident is acknowledged.
- Collect event information from SL1 and create a case or incident in Salesforce.

Contents of the SyncPack

This section lists the contents of the "Salesforce Service Cloud" SyncPack.

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 SyncPack](#).

Configuration Object

- **Base Salesforce Configuration.** This configuration object can be used as a template after the SyncPack 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 SyncPack:

- 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

Chapter

2

Installing the Salesforce Service Cloud SyncPack

Overview

This chapter describes how to install the "Salesforce Service Cloud" SyncPack and the "Salesforce Service Cloud: Synchronization Policies" PowerPack.

This chapter covers the following topics:

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Prerequisites for this SyncPack

This SyncPack requires the following:

- The latest "Salesforce Service Cloud: Synchronization Policies" PowerPack
- A Salesforce Developer account

For the latest System Requirements, see the [SL1 PowerFlow SyncPack Release Notes](#).

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

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

Downloading and Installing the Salesforce Service Cloud SyncPack

A SyncPack file has the `.whl` file extension type. You can download the SyncPack file from the ScienceLogic Support site.

Downloading the SyncPack

NOTE: If you are installing or upgrading to the latest version of this SyncPack in an offline deployment, see [Installing or Upgrading in an Offline Environment](#) to ensure you install any external dependencies.

To locate and download the SyncPack:

1. Go to the ScienceLogic Support Site at <https://support.sciencelogic.com/s/>.
2. Click the **[Product Downloads]** tab and select *PowerPacks & SyncPacks*.
3. In the **Search** field, search for the SyncPack and select it from the search results. The **Release Version** page appears.
4. On the **[Files]** tab, click the down arrow next to the SyncPack version that you want to install, and select *Show File Details*. The **Release File Details** page appears.
5. Click the **[Download File]** button to download the SyncPack.

After you download the SyncPack, you can import it to your PowerFlow system using the PowerFlow user interface.

Importing the SyncPack

To import a SyncPack 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 SyncPack you want to install. You can also drag and drop a **.whl** file to the **Import SyncPack** page.
3. Click **[Import]**. PowerFlow registers and uploads the SyncPack. The SyncPack is added to the **SyncPacks** page.
4. You will need to activate and install the SyncPack in PowerFlow. For more information, see the following topic.

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

Installing the SyncPack


To activate and install a SyncPack in the PowerFlow user interface:

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

NOTE: If you try to activate and install a SyncPack 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 SyncPack is activated, the **SyncPacks** page displays a green check mark icon (✓) for that SyncPack. 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 SyncPack. 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 SyncPack on your PowerFlow system, you can click the **[Actions]** button () for that SyncPack and select *Change active version* to activate a different version other than the version that is currently running.

Installing the Salesforce Service Cloud: Synchronization Policies PowerPack

The "Salesforce Service Cloud: Synchronization Policies" PowerPack includes run book automation and run book action policies that can be used to trigger, acknowledge, and resolve Salesforce cases or incidents and SL1 events.

NOTE: The "Salesforce Service Cloud: Synchronization Policies" PowerPack requires SL1 version 10.2.0 or later. For details on upgrading SL1, see the [SL1 Platform 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 the PowerPack:

1. Search for and download the PowerPack from the **PowerPacks** page (Product Downloads > PowerPacks & SyncPacks) at the [ScienceLogic Support Site](#).
2. In SL1, go to the **PowerPacks** page (System > Manage > PowerPacks).
3. Click the **[Actions]** button and choose *Import PowerPack*. The **Import PowerPack** dialog box appears.
4. Click **[Browse]** and navigate to the PowerPack file from step 1.
5. Select the PowerPack file and click **[Import]**. The **PowerPack Installer** modal displays a list of the PowerPack contents.
6. Click **[Install]**. The PowerPack is added to the **PowerPacks** page.

NOTE: If you exit the **PowerPack Installer** modal without installing the imported PowerPack, the imported PowerPack will not appear in the **PowerPacks** 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 PowerFlow Applications for the Salesforce Service Cloud SyncPack

Overview

This chapter describes how to set up the run book automations in SL1 and how to configure the PowerFlow applications in the "Salesforce Service Cloud" SyncPack.

This chapter covers the following topics:

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Workflow for Configuring the SyncPack

The following workflows describe how to configure SL1 and PowerFlow to work with the "Salesforce Service Cloud" SyncPack.

Configuring SL1

1. [Create a SOAP/XML credential to access PowerFlow](#)
2. [Edit the Salesforce run book actions](#)
3. [Enable the Salesforce run book automations](#)

Configuring PowerFlow

1. [Create a configuration object](#)
2. [Align the configuration object and configure the Salesforce PowerFlow applications](#)
3. [Schedule the PowerFlow applications](#)

Configuring SL1

The following topics cover how to set up your SL1 instance to work with the "Salesforce Service Cloud" SyncPack.

Creating a SOAP/XML Credential to Access SL1 PowerFlow

You will need to create a SOAP/XML credential so that the action policies included in the "Salesforce Service Cloud: Synchronization Policies" PowerPack can access your PowerFlow system.

You can use "PowerFlow SF Service Cloud" sample credential from the "Salesforce Service Cloud: Synchronization Policies" PowerPack as a template for a SOAP/XML credential.

To create a SOAP/XML credential:

1. In SL1, go to the **Credentials** page (Manage > Credentials).
2. Go to the **Credentials** page (Manage > Credentials). 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.
3. Complete 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. Take note of the SL1-assigned 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 run book actions included in the PowerPack, below.

Editing the Salesforce Run Book Actions

The "Salesforce Service Cloud: Synchronization Policies" PowerPack includes six action policies that you will need to enable.

These action policies 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. In SL1, go to the **Action Policy Manager** page (Registry > Run Book > Actions).
2. Locate the Salesforce run book action policy that you want to use, and then click its wrench icon (). The **Editing Action** page appears.
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 in the previous procedure. 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. Make sure the **Action State** is set to *Enabled*, and then click **[Save]**.

Enabling the Salesforce Run Book Automations

The "Salesforce Service Cloud: Synchronization Policies" PowerPack includes six standard automation policies that you can enable.


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:	All events	Salesforce Service Cloud: Acknowledge Case

Automation Policy Name	Aligned Events	Automation Action
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

To enable the run book automations:

1. In SL1, go to the **Automation** page (Registry > Run Book > Automation).
2. Locate a "Salesforce Service Cloud" automation policy and click its wrench icon (). The **Automation Policy Editor** page appears.
3. Update the following fields:
 - **Policy State.** Select *Enabled*.
 - **Policy Priority.** Select *High* to ensure that this PowerFlow automation policy is added to the top of the queue.
 - **Available Actions.** If it is not already selected, select the "Run Integration Service Application: <name>" action that corresponds with the Ansible automation policy you selected in step 2, and click the arrows to move it to **Aligned Actions**.

WARNING: ScienceLogic highly recommends that you do not make changes to the **Policy Type**, **Repeat Time**, or **Align With** fields or the *And event is NOT acknowledged* setting.

4. Click **[Save]**.
5. Repeat steps 2-4 for the remaining "Salesforce Service Cloud" run book automation policies.

Configuring PowerFlow

The following topics cover how to set up your PowerFlow instance to work with the "Salesforce Service Cloud" SyncPack.

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)

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.

For this SyncPack, 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" SyncPack.

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.

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'.

6. Click **[Save]**. You can now align this configuration object with one or more applications.

Aligning a Configuration Object and Configuring PowerFlow Applications

With this SyncPack, 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 SyncPack, you must "align" the configuration object to run with the PowerFlow applications included in this SyncPack.

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.

2. 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.

3. Update any of the remaining fields on the **Configurations** pane as needed.
4. Click **[Save]**.
5. Repeat this process for the other PowerFlow applications.

Scheduling PowerFlow Applications

To trigger the applications in the SyncPack, you must schedule the applications included in the SyncPack.

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 create a schedule:

1. On the **Applications** page (📄), click the **[Schedule]** button for the application you want to schedule. The **Scheduler** window appears.
2. In the **Schedule List** pane, click the down arrow icon (▼) next to an existing schedule to view the details for that schedule.
3. In the **Schedule Creator** pane, complete the following fields for the default **Frequency** setting:
 - **Schedule Name.** Type a name for the schedule.
 - **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.
4. To use a cron expression, click the **Switch to Cron Expression** toggle to turn it blue. 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:

Schedule Creator
Switch to Frequency in Seconds

For more information about schedules, see [schedules documentation](#).

Schedule Name
Saturday Schedule

A unique name for the new schedule.

Cron Expression key operators

* any value , list separator - range of values / step values

Minutes 0,30	Hours *	Day of Month *	Month *	Day of Week 6
Allowed values: 0-59	Allowed values: 0-23	Allowed values: 1-31	Allowed values: 1-12 Alt. values JAN-DEC	Allowed values: 0-6 Alt. values SUN-SAT

Runs app: "Every 0 and 30th minute past every hour on Sat" (UTC -4)

Derived from given values in fields above.

Custom Parameters (Optional)

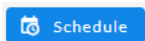
1	{ }
---	-----

Overrides default application variables for ad-hoc execution settings. Any application variable may be specified, and overridden per run here. Special properties like "queue" may also be set here.

Close Save Schedule

As you update the cron expression, the **Schedule** window displays the results of the expression in more readable language, such as *Runs app: "Every 0 and 30th minute past every hour on Sat"*, based on 0,30 in the **Minutes** field and 6 in the **Day of Week** field.



- Click **[Save Schedule]**. The schedule is added to the **Schedule List** pane. Also, on the **Applications** page, the **[Schedule]** button now displays with a dark blue background:



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:

- On the **Applications** page, click the **[Schedule]** button for the application that contains a schedule you want to delete. The **Scheduler** window appears.

2. Click the down arrow icon () to view the details of an existing schedule.
3. To delete the selected schedule, click the Actions icon () and select **[Delete]**.

TIP: On the **Scheduler** window for a PowerFlow application, you can click the **[Copy as]** button from the **Schedule List** pane to make a copy of an existing schedule.

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 SyncPack for the purpose of distinguishing between domains is not supported, and will result in issues on upgrades.

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