

ServiceNow connection with ROGER365.io



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Version 1.0



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High-level overview of the steps

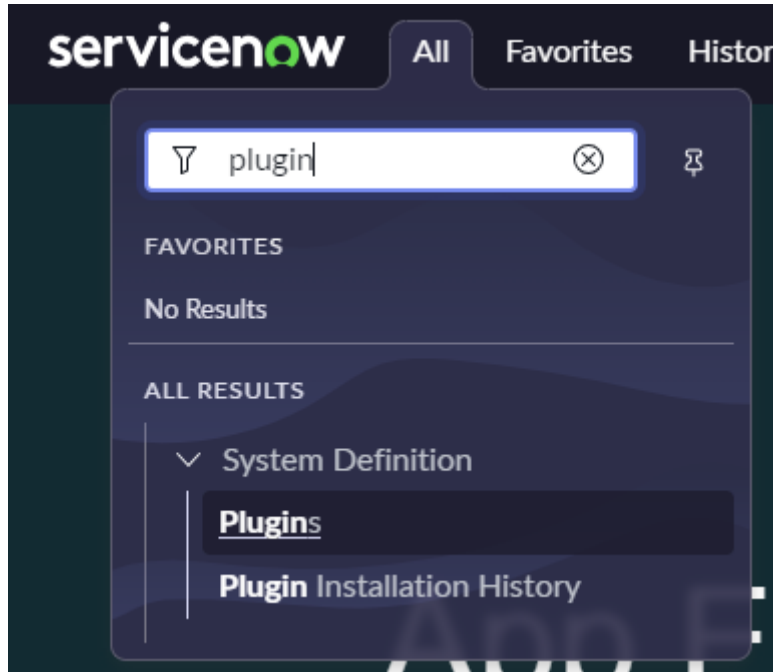
- 1) Add the Customer Service plugin to the ServiceNow instance
- 2) Add and configure API user
- 3) Configure the CRM replicator in the ROGER365.io portal

At the time of writing no licenses are required to enable this connection.

Adding the Customer Service plugin

For the connection to work, we need the Customer Service plugin available in the ServiceNow instance. This can be added through the plugins section.

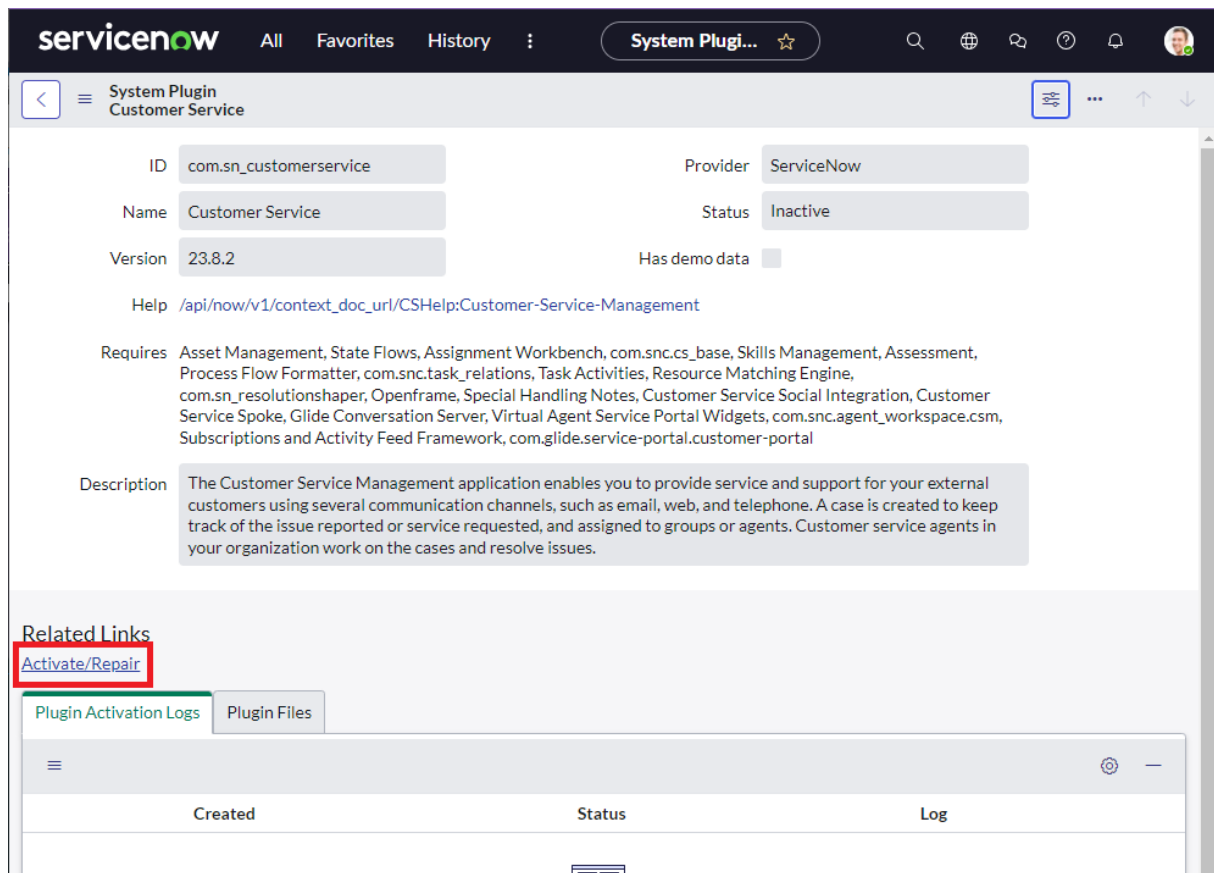
Go to all and search for plugins and select the menu item



In the System plugins menu, search for the com.sn_customerservice by entering this in the id column.

servicenow All Favorites History System Plugins ☆				
≡	🔍	💬	System Plugins	Name ▾ Search
All > Name >= com.sn_customerservice > ID starts with com.sn_customerservice				
☐	Name ▲	Version	Status	ID
☐	Search	Search	Search	com.sn_customerservice
	Customer Service	23.8.2	Inactive	com.sn_customerservice

Click on the Activate/Repair link to access the activate plugin screen



The screenshot shows the ServiceNow interface for the 'Customer Service' plugin. The top navigation bar includes 'servicenow', 'All', 'Favorites', 'History', and a 'System Plug...' button. The main content area displays plugin details: ID (com.sn.customerservice), Name (Customer Service), Version (23.8.2), Provider (ServiceNow), and Status (Inactive). A 'Help' link is provided, and a 'Requires' section lists dependencies. The 'Description' section explains the plugin's purpose. Below this, the 'Related Links' section contains a red-bordered link labeled 'Activate/Repair'. At the bottom, there are tabs for 'Plugin Activation Logs' and 'Plugin Files', and a table with columns 'Created', 'Status', and 'Log'.

System Plugin
Customer Service

ID: com.sn.customerservice
Name: Customer Service
Version: 23.8.2
Provider: ServiceNow
Status: Inactive
Has demo data: ☐

Help: /api/now/v1/context_doc_url/CSHelp:Customer-Service-Management

Requires: Asset Management, State Flows, Assignment Workbench, com.snc.cs_base, Skills Management, Assessment, Process Flow Formatter, com.snc.task_relations, Task Activities, Resource Matching Engine, com.sn_resolutionshaper, Openframe, Special Handling Notes, Customer Service Social Integration, Customer Service Spoke, Glide Conversation Server, Virtual Agent Service Portal Widgets, com.snc.agent_workspace.csm, Subscriptions and Activity Feed Framework, com.glide.service-portal.customer-portal

Description: The Customer Service Management application enables you to provide service and support for your external customers using several communication channels, such as email, web, and telephone. A case is created to keep track of the issue reported or service requested, and assigned to groups or agents. Customer service agents in your organization work on the cases and resolve issues.

Related Links
[Activate/Repair](#)

Plugin Activation Logs | Plugin Files

Created	Status	Log
---------	--------	-----

Scroll down to get the activate button and press is to add the Customer Servicedesk plugin to the ServiceNow instance.

System Plugin - Customer Service ☆

Plugin dependency status	
Glide Conversation Server	currently installed
Virtual Agent Service Portal Widgets	currently installed
Subscriptions and Activity Feed Framework	currently installed
Assessment	currently installed
Asset Management	currently installed
Assignment Workbench	will be activated
Customer Service Spoke	will be activated
Resource Matching Engine	will be activated
Process Flow Formatter	currently installed
Skills Management	will be activated
State Flows	will be activated
Task Activities	will be activated
Customer Service Social Integration	will be activated
Openframe	will be activated
Special Handling Notes	will be activated

Some files will not be loaded because these plugins are inactive:

- [Conversational Messaging](#)
- [Predictive Intelligence - Task Intelligence](#)
- [Business Location](#)
- [Customer Service Case Action Status](#)
- [Customer Service Case Types](#)
- [CSM Contributor User](#)
- [Customer Service with Field Service Management](#)
- [Predictive Intelligence for Customer Service Management](#)
- [Outsourced Customer Service](#)
- [Customer Project Management](#)
- [CSM Extension for Proxy Contacts](#)
- [Customer Service Base Extension Entities](#)
- [Customer Service Household](#)
- [Customer Service Install Base Management](#)
- [Knowledge Management Advanced](#)
- [Service Organization](#)
- [Skills Management](#)
- [Skill Determination](#)
- [Case Digests](#)
- [Customer Central](#)
- [Customer Service with Service Management](#)
- [Customer Service with Request Management](#)
- [Customer Service](#)
- [Major Issue Management](#)
- [ServiceNow Add-Ins for Microsoft Office](#)

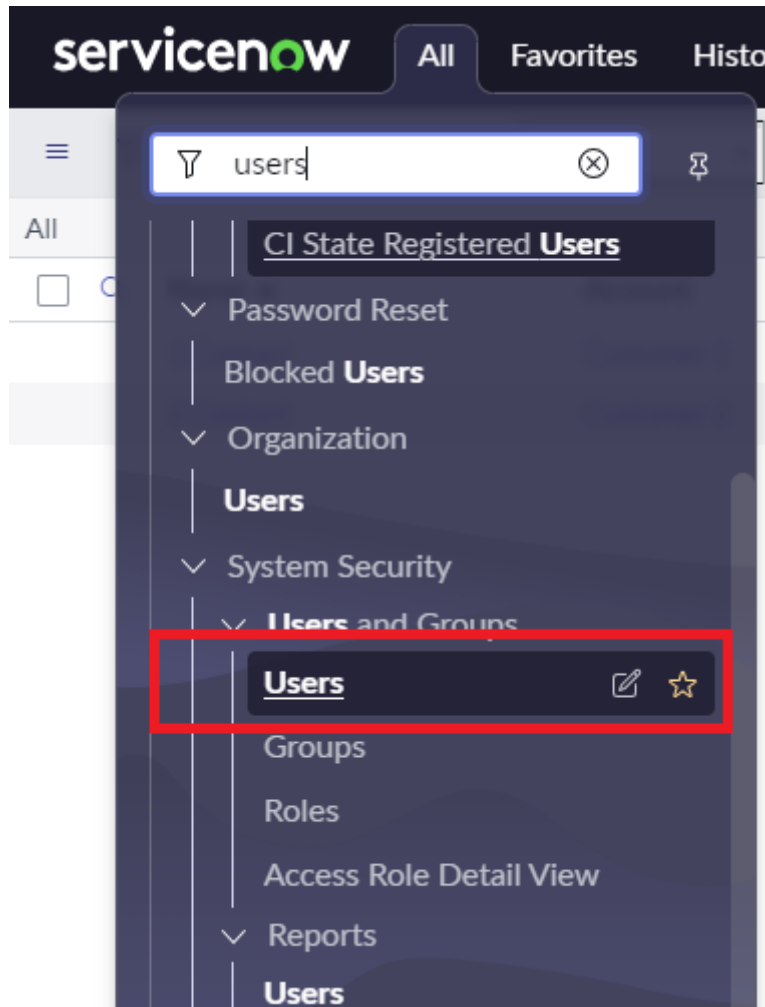
[Learn more](#)

Cancel
Activate

Create a ServiceNow user

After the Customer Servicedesk plugin is added to the instance, an user have to be created to be used for the CRM replicator.

Go to the users screen (all > users)



And add a new user to be used as the CRM replicator user. Check the Web Service access only toggle box.



servicenow All Favorites History : **User - New Record** ☆ Search

< ≡ User New record

ⓘ To set up the User's password, save the record and then click Set Password.

User ID	ROGER365.io	Email	
First name	ROGER365.io	Language	-- None --
Last name	CRM Replicator	Calendar integration	Outlook
Title		Time zone	System (America/Los_Angeles)
Department		Date format	System (yyyy-MM-dd)
Password needs reset	☐	Business phone	
Locked out	☐	Mobile phone	
Active	☒	Photo	Click to add...
Web service access only	☒		
Internal Integration User	☐		

Submit

Create the user and open it again to set a password for the CRM replicator user

servicenow All Favorites History : **User - ROGER365.I...** ☆ Search

< ≡ User ROGER365.io CRM Replicator Update Set Password Delete

User ID	ROGER365.io	Email	
First name	ROGER365.io	Language	-- None --
Last name	CRM Replicator	Calendar integration	Outlook
Title		Time zone	System (America/Los_Angeles)
Department		Date format	System (yyyy-MM-dd)
Password needs reset	☐	Business phone	
Locked out	☐	Mobile phone	
Active	☒	Photo	Click to add...
Web service access only	☒		
Internal Integration User	☐		

Update **Set Password** Delete

Related Links

After generating a password and saving the user. The role `csm_ws_integration` has to be added to the CRM replicator user. This also can be done in the user screen by pressing the edit button on the Roles tab.

Internal Integration User ☐

[Update](#) [Set Password](#) [Delete](#)

Related Links
[View linked accounts](#)
[View Subscriptions](#)
[Reset a password](#)

[Roles \(2\)](#) [Groups](#) [Delegates](#) [Skills](#) [Subscriptions](#)

Actions on selected rows... [Edit...](#)

User = ROGER365.io CRM Replicator

[Add Filter](#) [Run filter](#) ?

-- choose field -- -- oper -- -- value --

Collection

--None--

Roles List

ROGER365.io CRM Replicator

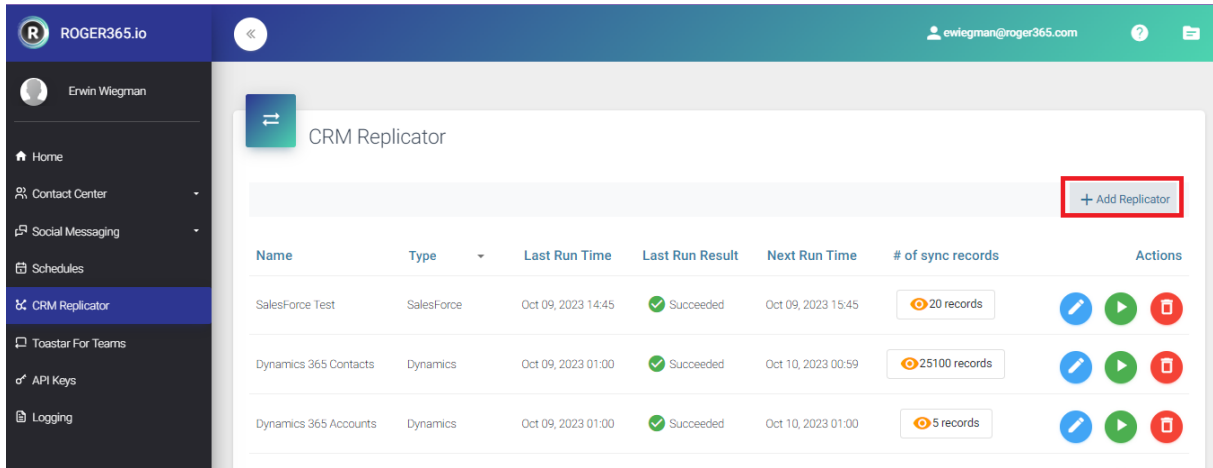
> <

[Cancel](#) [Save](#)

Name `csm_ws_integration`

Creating the ROGER365 ServiceNow replicator

In the ROGER365.IO portal choose the CRM replicator option and choose the + add replicator



The screenshot shows the ROGER365.io CRM Replicator interface. The left sidebar contains navigation options: Home, Contact Center, Social Messaging, Schedules, CRM Replicator (selected), Toaster For Teams, API Keys, and Logging. The main content area is titled 'CRM Replicator' and features a '+ Add Replicator' button in the top right corner, highlighted with a red box. Below this is a table listing existing replicators.

Name	Type	Last Run Time	Last Run Result	Next Run Time	# of sync records	Actions
SalesForce Test	SalesForce	Oct 09, 2023 14:45	✓ Succeeded	Oct 09, 2023 15:45	20 records	[Edit] [Run] [Delete]
Dynamics 365 Contacts	Dynamics	Oct 09, 2023 01:00	✓ Succeeded	Oct 10, 2023 00:59	25100 records	[Edit] [Run] [Delete]
Dynamics 365 Accounts	Dynamics	Oct 09, 2023 01:00	✓ Succeeded	Oct 10, 2023 01:00	5 records	[Edit] [Run] [Delete]

Give the replicator a Name and choose the type ServiceNow from the pull-down menu. If done correctly the screen changes to the screen below.



Create a new Replicator

Name *

ServiceNow

Description

Connection configuration

Type *

ServiceNow

Entity *

ConnectionUrl *

User *

Password *

Replication configuration

Start Time *

Frequency *

Day

Interval *

10

Contact Url

Country Code *

Netherlands (+31)

CANCEL

SAVE

In this screen all the configuration from the previous steps will be used.



Setting	Value
Connection URL	URL to the ServiceNow tenant for example: <code>https://dev178427.service-now.com/</code>
User	Username of the CRM replicator user created earlier
Password	Password of the CRM replicator user created earlier
Contact URL	URL syntax is: <code>https://<Url-to-your-ServiceNow-Instance>/{{Custom0}}?sys_id={{SourceId}}</code> For example: https://dev178427.service-now.com/{{Custom0}}?sys_id={{SourceId}}
Country Code	All phone numbers must be in E164 format. This setting gives the default country if local phone numbers are used. For more information see doc.roger365.io