ServiceNow Integration with Alchemer Workflow

Overview

ServiceNow is a cloud-based IT service management platform used by organizations to manage digital workflows, automate operations, and streamline IT, HR, and business processes.

The Alchemer integration with ServiceNow supports automated record retrieval, record updates, and record creation. The Alchemer ServiceNow integration allows Alchemer to use information from ServiceNow to personalize workflow paths, enrich routing logic, create merge codes, and update ServiceNow records without manual intervention.

Common uses for the Alchemer ServiceNow integration

- Personalize emails and workflow steps with data from ServiceNow records
- Use ServiceNow record fields in workflow logic and branching
- Automate retrieval and updates of incidents, problems, change requests, and service catalog items
- Create new ServiceNow records triggered by workflow events
- Reduce manual data entry and record maintenance
- Keep ServiceNow records synchronized with data collected in Alchemer

What can the Alchemer ServiceNow integration do?

- Get record
- Update record
- Create record

Supported ServiceNow tables

- Incident
- Problem
- Change Request
- SC Request
- SC Req Item
- SC Task

You will need

- ServiceNow OAuth credentials (Instance URL, Client ID, and Client Secret). More details in the authentication how-to guide.
- An Alchemer plan that includes integrations and the Integration Manager permission enabled.

- Contact us if you are unsure if your plan includes integrations.

Setup Alchemer ServiceNow integration in workflow

ServiceNow | Get Record

You will need:

- ServiceNow OAuth credentials. More details in the authentication how-to guide.
- A workflow field containing a unique identifier for the ServiceNow record you want to retrieve

Configure the action

1. Open your workflow in **Workflow Builder**.
2. On the right side, drag and drop the **ServiceNow** connection where you want the action to trigger.
3. In the connection box, click the pencil icon in the top-right corner.
4. Select **ServiceNow | Get Record**.
5. **ServiceNow | Authentication:** Select an existing authentication or create a new authentication.
6. **ServiceNow | Select table:** Select the table that contains the record you want to retrieve (e.g., Incident, Problem, Change Request).
7. **ServiceNow | Get Record:** Select the Alchemer field(s) containing the unique identifier for the record you want to look up. Multiple fields will be combined with the AND operator.
8. **ServiceNow | Get data back:** Select the ServiceNow record fields you want returned to the workflow. These can be used to personalize emails or drive workflow logic.
9. Save the action.

Status codes

- 200: Successfully found record
- 201: Query ran successfully, but no records were found
- 202: Multiple records were found. The first record was used for the return
- 400: The external integration returned an error

ServiceNow | Update Record

You will need:

- ServiceNow OAuth credentials. More details in the authentication how-to guide.

- A workflow field containing a unique identifier for the ServiceNow record you want to update

Configure the action

1. Open your workflow in **Workflow Builder**.
2. On the right side, drag and drop the **ServiceNow** connection where you want the action to trigger.
3. In the connection box, click the pencil icon in the top-right corner.
4. Select **ServiceNow | Update Record**.
5. **ServiceNow | Authentication:** Select an existing authentication or create a new authentication.
6. **ServiceNow | Select table:** Select the table that contains the record you want to update (e.g., Incident, Problem, Change Request).
7. **ServiceNow | Find Record:** Select the Alchemer field(s) containing the unique identifier for the record you want to update. Multiple fields will be combined with the AND operator.
8. **ServiceNow | Update Record:** Map Alchemer fields to the ServiceNow record fields you want to update.
9. **ServiceNow | Get data back:** Select metadata fields (e.g., message, status code) to return. These can be used to help debug your action setup.
10. Save the action.

Status codes

- 200: Successfully updated record
- 201 Query ran successfully, but no records were found
- 202: Multiple records were found. No records were updates
- 400: The external integration returned an error

ServiceNow | Create Record

You will need:

- ServiceNow OAuth credentials. More details in the authentication how-to guide.
- Workflow fields containing the data needed to populate the new ServiceNow record

Configure the action

1. Open your workflow in **Workflow Builder**.
2. On the right side, drag and drop the **ServiceNow** connection where you want the action to trigger.
3. In the connection box, click the pencil icon in the top-right corner.

4. Select **ServiceNow | Create Record**.

5. **ServiceNow | Authentication:** Select an existing authentication or [create a new authentication].

6. **ServiceNow | Select table:** Select the table where the new record will be created (e.g., Incident, Problem, Change Request).

7. **ServiceNow | Create Record:** Map Alchemer fields to the ServiceNow record fields you want to populate.

8. **ServiceNow | Get data back:** Select metadata fields (e.g., message, status code) to return. These help with debugging your integration.

9. Save the action.

Status codes

- 200: Successfully created record
- 400: The external integration returned an error

Testing and Troubleshooting

Testing and Validation

How to test

- Trigger the workflow and monitor individual runs in the **Monitor** tab.
  - Click on individual workflow runs to see input/output metadata.
- Confirm the expected retrieval, update, or creation occurs in ServiceNow.
- Use metadata values returned to verify success or help debug issues.

How to verify results

- Check the impacted record directly in ServiceNow.
- Ensure all retrieved or updated values match workflow expectations.

Monitoring Integration Activity

Where to find logs

- Go to **Results → Monitor**.
- Select the integration step you want to inspect.

What logs display

- Input/Output

Troubleshooting

Authentication issues

- Incorrect or expired OAuth credentials
- Client ID or Client Secret not matching the ServiceNow OAuth application
- User lacks permission to access or modify the target ServiceNow table

Lookup failures

- Invalid or missing unique record identifier
- No matching record found in the selected table

Mapping errors

- Invalid field types or unsupported values for the selected table
- Incorrect formatting (e.g., date fields must match ServiceNow expected formats)

API errors

- Validation issues from the ServiceNow API
- Endpoint or table access restrictions

FAQs

What permissions do I need?

Integration Manager in Alchemer and an OAuth application configured in ServiceNow with appropriate table access.

When does the integration run?

When the workflow triggers and reaches the ServiceNow integration step.

Can I use multiple ServiceNow actions in one workflow?

Yes. Actions can work independently or together.

Which tables are supported?

Incident, Problem, Change Request, SC Request, SC Req Item, and SC Task.

Why isn't my data updating?

Check the Monitor logs for lookup issues, mapping problems, or API errors.

What if I need additional functionality?

Contact Alchemer Support for enhancement requests.

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