Set Up a Connection in Visual Mode for Zendesk

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Important: You cannot toggle between the different modes. To do so, you need to create a new Connection in Visual mode, Script mode, or Basic mode.

Note: Before you set up a Connection in Visual mode ensure that:

- your instance is public.
- you have admin access to the destination instance.
- you are either in the Evaluation (trial) period or have a Paid license.

Initiate a Connection in Visual Mode from Zendesk

Note: It doesn't matter which side you start initiating the Connection from. The Exalate UI remains the same.

Note: We are exploring ways to enhance or replace Visual Mode with an Al-Configuration mode for a better user experience. Check the **Beta** label added to the Visual mode screens. Your feedback is crucial, so let us know what you think.

1. Navigate to the **Connections** tab in the Exalate console.

To navigate to the **Connections** tab:

1. Click **Exalate** in the list of apps.

	+ Add					
A	Dashboard					
2	Updates to your tickets	Open Tickets (current)	Ticket Statistic	s (this week)	
2:	No recent updates.	1 YOU	523 GROUPS	0 GOOD	0 BAD	0 SOLVED
用		Tickets requ	iring your att	ention (501) What	at is this?	
ul			ID Su	ubject		
¢		Priority: Urg	ent			
ÁŢ	Exalate		#81 Te	st ticket		
			#83 De	emo		

2. Click Connections.

	\land exalate	© Connections
	example.exalate.net	Connection defines synchronization behavior, including communication details, sync rules, and acope.
	→ Getting Started	
	General Settings	
	Connections	
	Q Entity Sync status	
	O Triggers	
	Errors	You do not have any connection defined yet.
	Exalate Notifications	Create a new connection
	🖉 License Details	
	Dulk Connect	Documentation EULA Support Report a bug
	IE Sync Queue	Powered by Exalate v. 5.4.9 (Core v. 5.4.9)
	Clean-up Tools	
2. Click Initiate	Connection	

Connections			
Connection defines synchronization behavior, including communication details, sync rules, and scope.	Initiate connection	Accept invitation	C

3. Enter the Destination Instance URL.

The **Destination Instance URL** is the link to the instance you want to set up a connection with. You can directly enter the link of that instance or the **Exalate URL** from the **General Settings** tab in the Exalate admin panel.

don't have the link, click I don't ection in Script mode.	have a URL. In th	nis case, you are	only able to
Initiate	connection	×	
Destination instance URL		l don't have a URL 💽	
		Next	

Exalate suggests available Configuration Modes based on the destination instance..

4. Select the Configuration Mode. In this case, Visual Mode.

Note: We are exploring ways to enhance or replace Visual Mode with an Al-Configuration mode for a better user experience. Check the **Beta** label added to the Visual mode screens. Your feedback is crucial, so let us know what you think.



5. Click Next.

6. Enter the Connection Information

Field	Description
Local instance short name	A short name for your instance
Destination instance short name	A short name for the destination instance
Connection name	Name of the connection
Description	Description of the connection

Connection information		
Local instance short name*	Remote instance short name*	
	0	
Connection name*		
Description		

7. Click Next.

8. Click **Verify admin access** to confirm you have admin rights to the destination instance. Then click **Initiate**.

	Initiate connection	×
Exalate will establish a Visual mode	e connection with	
I	Verify admin access	

9. Click **Accept** to finish the verification process.

You see a pop-up window within the remote instance to finish the verification. You are also notified about the permissions that the destination instance user has.

The destination instance user has different permissions based on the platforms to be synced.

10. Click Initiate.

	Initiate connection	×
	Verification confirmed. You can continue setting up the connection.	
	< Previous	Initiate
11. The Connec	tion has been set up.	
	Initiate connection	×

Initiate connection	×
Congratulations!	
company A company B	
Connection is established. Configure Sync	

Configure the Sync (Scope)

1. Click **Configure Sync** to start configuring the connection.

You can even configure an existing connection by navigating to the **Connections** tab. Then click

the Edit Connection $\ensuremath{\fbox{Connection}}$ icon in front of the Connection name.

2. Select Project on both sides.

Select the projects you want to use for the Connection, at both ends.

Note: Projects are not applicable to	Zendesk in which	case only the Filte	r Entities screen are
visible.			

Scope		Rules 2
efine the context for the synchronization: wh	at issues you want to sync and how to start the s	ynchronization process.
company A		company E
Select Project	Sync method	Select Project
Select Project 🗸 🗸	Manual → V	Select Project V
▼ Filter entities	Manual ← ✓	T Filter entities

3. Click Filter entities (Optional)

With this option, you can decide what information must be synchronized.

Select conditions to t	filter entities for sv	nchronization:			
abels	Issue 1		s	itatus	
Labels	Issue	type	· ·	Status	~
Priority					
Priority	∣ ~ -	- More			

Set the **Filters**

You can also choose to have multiple filter options.

Filter example:

Status = Open, Hold		
Type = Task		
Priority = Urgent		

In this case, the following combinations are synced:

- 1) Task with the Open status and Urgent priority
- 2) Task with the Hold status and Urgent priority
- 4. Set the Sync Method

Sync method

Automatic >	~
Manual <	~

This option allows you to decide how information must be synced between the task management systems. You can choose from the following options:

Manual

The issue is synchronized manually.

Automatic

The issue is synchronized automatically based on the entities you have filtered in the previous step.

Disabled

The synchronization is disabled.

The arrows decide the direction of the synchronization.

5. Click **Next** to configure the field mappings.

Add the Field Mappings (Rules)

Rules denote the mapping between different entities & decide what must be synchronized. There are predefined default mappings for basic fields in every Visual mode Connection.

You can access these mappings by clicking **Next** after configuring the sync. The **Rules** section consists of these mappings.

npany_ .ctive	A_to_company_B		•	Back to Connections P
		Scope	Rules	
Configure	the synchronization behavio	r with the help of field mappings and script rules.		
Expand	all Collapse all			+ Add mapping ~
Order	company A	Sync direction	company B	
1	Tags	\longleftrightarrow	Labels	e 🗊
2	> Туре	\longleftrightarrow	Issue type	2 🕯
3	> State	\longleftrightarrow	Status	2 🕯
4	Priority	\longleftrightarrow	Priority	c û
5	Title	\longleftrightarrow	Summary	6 🗊
6	Description	\longleftrightarrow	Description	6 🗊
7	Comments	<>	Comments	e 💼

Note: The above is just an example of mapping. The actual mappings depend on the platforms under sync.

The top bar displays the local instance's short name and the remote instance's short name. These are the names you provided while setting up a connection.

It also has a **Sync direction**. The arrows indicate the direction, whether uni or bi-directional. You can choose to **Expand all** or **Collapse all** the mappings.

You can **Edit connection C** or **Delete mapping**. You can also drag and drop them, up or down to re-prioritize.

Edit Mappings

For instance, if you want to edit the Tags \leftrightarrow Labels mapping, click the **Edit mapping** \square icon.

An Edit mapping dialog box opens.

Sync direction	company B*
$\longleftrightarrow \lor \checkmark$	Labels
	If no matching value *
	Do nothing 🗸 🗸

Select the new fields to be mapped on both sides from the drop-down list. You can also edit the **Sync direction.** Sync direction allows you to control your sync in a specific direction, where the arrows indicate the direction.

Delete Mappings

You can delete a certain mapping if you don't want it.

Delete mappi	ng rule?	×
You are about to delete the mapping rule. Synchr will stop.	onization of the field, based on	this rule
	Cancel	Delete

Clicking the bin icon opens up a prompt to ensure you really want to delete the mapping. Click **Delete** to confirm the deletion.

Add New Mappings

To add a new mapping, click the **Add mapping** button.

Company A_to_company B Active	Back to Connections	Publish
Scope	Rules	
Configure the synchronization behavior with the help of field mappings and script rules.		
Expand all Collepse all	+ Add mapp	ing 🗸

An Add mapping dialog box opens.

company A*		Sync c	lirection			company B*
Select	~			~	Select	· ·

Select the required fields at both ends from a drop-down list. You can choose to keep the **Sync direction** as it is by default or edit it. Sync direction allows you to control your sync in a specific direction, where the arrows indicate the direction.

Cancel

You can add sub-mappings by clicking the plus icon.

You can also specify what to do if the selected values do not match.

matching value	*
nothing	~
a default value	
port an error	
nothing	

If no matching value is found you can choose to:

Option	If the value doesn't exist
Set a default value	Fields are set to a default value you specify
Report an error	An error appears & is displayed on the Errors tab. The synchronization is blocked in this case.
Do nothing	The values stay the same

Save the changes whenever you are ready.

Custom field mappings

When you set up a Visual mode connection, Exalate fetches some of the custom fields for you. These are available through a drop-down list while adding a mapping.

If you don't find the custom field, there is always an option to add Scripts.

The following are the supported custom field types:

Text:

- Jira Cloud: Text Field (multi-line), Text Field (single line)
- ADO: Text (single line), Text (multiple lines)
- Zendesk: Text, Multi-line, Date, Number, Decimal

Option:

- Jira Cloud: Radio Buttons, Select List (single choice)
- ADO: Picklist (string), Picklist (integer)
- Zendesk: Drop-down

User:

- Jira Cloud, on-prem: User Picker (single user)
- ADO: Identity
- Zendesk: Not supported

Add Scripts for Advanced Configuration (Optional)

For advanced synchronization use cases, you can add Groovy Scripts to your Visual mode Connection.

To do so, click the arrow on the Add Mapping button. Select Add Script.

<pre>>> company A_to_company B ● Active</pre>		< Back	to Connections	Publish
Scope		Rules		
Configure the synchronization behavior with the help of fi	eld mappings and script rules.			
Expand all Collapse all			+ Add mapping Add script	<u> </u>
Order न company A Sy	ync direction	company B		

There is a default Script in the dialog box. You can edit it or simply delete the entire Script to start writing from scratch. Click **Save** when you finish adding the Scripts.

	Add script
1 2 3 4 5 6 7	<pre>cripting to add an advanced rule. Check examples. // sync value from "remote side text custom field" to the local "text custom field" // jcloud.issue.customFields."text custom field" value = jirablue.issue.customFields."remote side text custo // Set a fixed value "Exalate" in the custom field with name "My custom field" // jcloud.issue.customFields."My custom field" value = jirablue // sync value from "remote side select list custom field" to the local "select list custom field" // jcloud.issue.customFields."select list custom field" value = jirablue.issue.customFields."remote side sel // jcloud.issue.customFields."Select list custom field " value = jirablue.issue.customFields."remote side sel // jcloud.issue.customFields."My select list".value = "Red" // labels sync // jcloud.issue.labels = jirablue.issue.labels</pre>
	Cancel Save

Script Syntax:

As a general rule of thumb, the Scripts follow the following syntax:

your_instance_shortname.issue.customFields."your custom field name".value = remote.issue.customFields."remote custom field name

Where,

1. your_instance_shortname is the source instance.

2. remote_instance_shortname is the destination instance.

These are the names you provided while setting up the Connection.

Initiate connection		
Connection information Source side shortname*	Destination side shortname*	
Connection name*		
Description		
< Previous		Initiate

3. This is followed by other issue properties, each separated with a "." operator.

Publish the Changes

To save the changes made to the **Scope** and **Rules** section and apply them to the Connection you have created, click **Publish**.

	» company A_to_company B ● Active	< Back to Connections	Publish
	Scope	Rules	
	Configure the synchronization behavior with the help of field mappings and script rules.		
	Expand all Collapse all	+ Add mapping	~
	Order 🕂 company A Sync direct	ion 🗙 company B	
• Ctrl+S o • Cmd+S	an also use these hotkeys to p on Windows or Linux on Mac	oublish a connection:	
Glossary 🖸 API Reference 🗗	ration changes made to the Co	onnection are applied on the	next synchronization.
Security 🖸 Pricing and Licensing 🖸			
Resources Academy [2] Blog [2] YouTube Channel [2] Ebooks [2] Still need help?			
Join our Community 🗗 Visit our Service Desk 🗗 Find a Partner 🗗			