Set up a Connection in Basic Mode for Salesforce

Connections in Basic mode have a set of **Sync Rules**, generated by Exalate. In Basic connections, you can only sync **cases**.
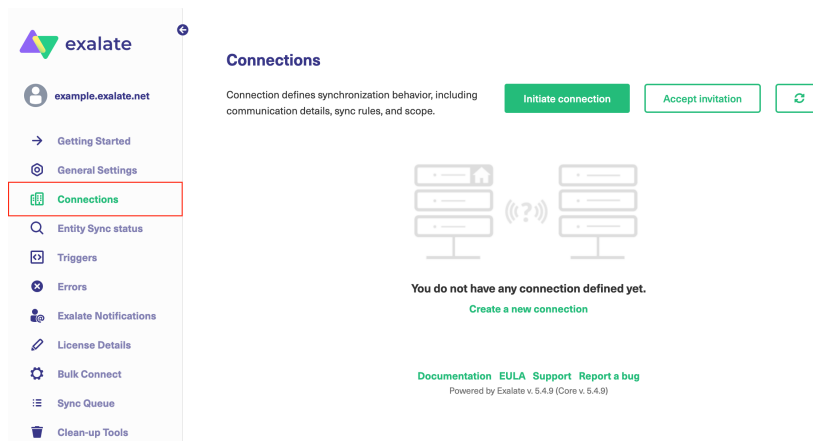
Note: You cannot modify **Sync Rules** in Basic Mode.

If you want to edit/delete Sync Rules, you can upgrade the connection to Visual Mode or Script Mode.

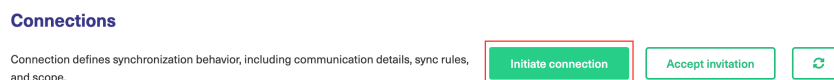## Initiate a Connection in Basic Mode from ServiceNow

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

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

Click **Connections.**
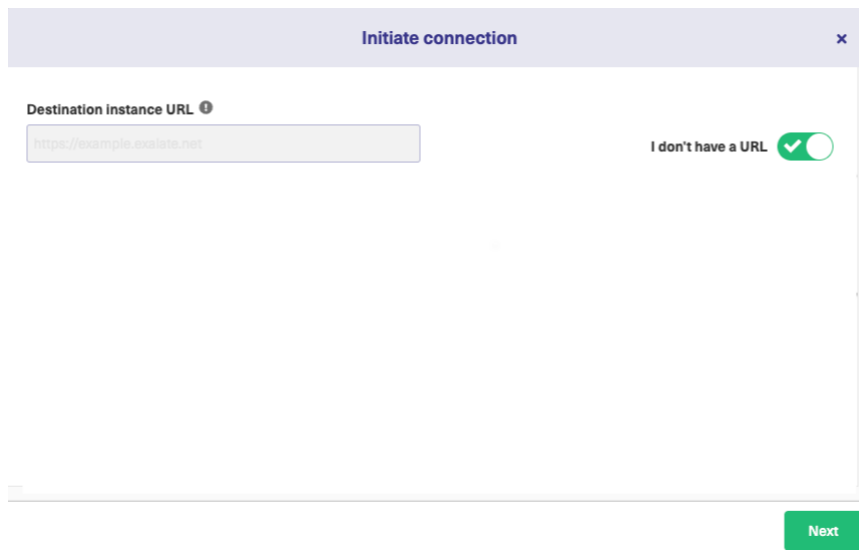
2. Click **Initiate connection**.

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**
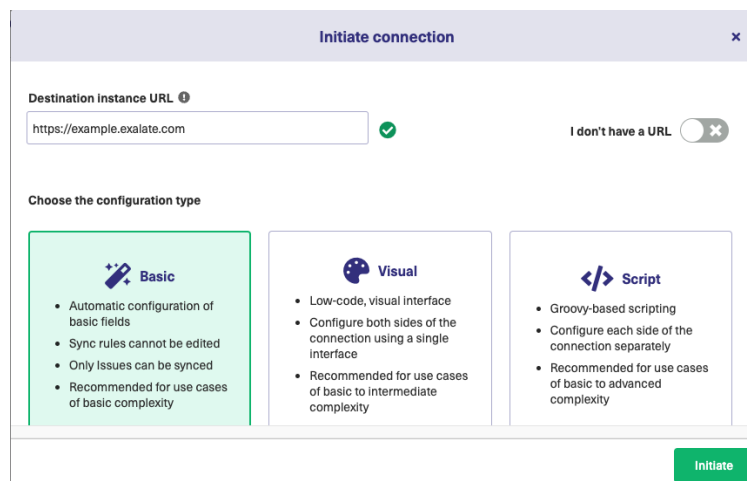
Settings tab in the Exalate admin panel**.**

> **Note**: If you enter the URL of your own instance here, Exalate determines it's a local connection between 2 projects within your instance.

Exalate will suggest available Configuration Modes based on the destination instance.

4. Select **Basic**.

5. Click **Next**.

6. Confirm if you have admin access to the destination instance.

Further steps will be different if you have or don't have admin access to the destination instance.

- Select **Yes, I have admin access** if you have admin access to the destination instance. You will be redirected to the destination instance to establish a connection.
- Select **No, I don't have admin access** if you don't have admin access to the destination instance. You will generate an invitation for the destination instance admin so they could establish a connection on their end.

Initiate connection   ✕

Do you have admin access to the destination instance?

✓ **Yes, I have admin access**

• You will be redirected to the destination instance to establish the connection

🚫 **No, I don't have admin access**

• You will generate an invitation and send it to the destination instance admin to establish the connection

‹ Previous   **Initiate**

Steps for: Yes, I have Admin Access

Click **Yes, I have admin access & Initiate** the connection.

Note: You will be required to verify access on the destination instance. After which complete the following steps on the destination instance.

7. Select the project or repository where you want to sync entities.

Note: Selecting the project or repository is not applicable to all platforms. In this case, the Connection will be established after the previous step.

Accept invitation   ✕

Select a project for the incoming sync

After accepting an invitation for a Basic mode connection, Exalate will be able to sync basic issue fields. The sync rules cannot be updated. Exalate will sync the following issue data: summary, description, comments, and attachments.

Issue types are mirrored. This means that tasks will be synced as tasks, bugs as bugs, and improvements as improvements. If an issue type is not included in the basic set, it will be synced as a task.

Please select the project where you want to create entities, received from the other side.*

Select Project   ⌄

‹ Previous   Confirm

8. Click **Confirm**.

The Connection has been set up.

Steps for: No, I don't have Admin Access

Click **No, I have admin access & Initiate** the connection.

7. Click **Copy invitation code**.

You can send the invitation code to the destination instance admin.

8. Click **Done**.

> **Note**: Complete the following steps on the destination instance.

9. Click on **Accept Invitation** under the **Connections** tab in the Exalate Admin Console in the destination instance and Paste the invitation code.

10. Click **Next.**

11. Select the project where you want to sync issues.

> **Note**: Selecting the project is not applicable to all platforms. In this case, the Connection will be established after the previous step.

12. Click **Confirm**.

The Connection has been set up.

Connection established successfully ✔

Sync your first issue to see how it works.

Please enter an issue key from the project **Test (TEST)** to proceed

TEST-1

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