Set up a Connection in Basic Mode for Salesforce

Last Modified on 03/13/2024 5:49 am EDT

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.

	exalate	e Connections
θ	example.exalate.net	Connection defines synchronization behavior, including Initiate connection Accept invitation Communication details, sync rules, and scope.
→	Getting Started	
0	General Settings	
0	Connections	
Q	Entity Sync status	
Ø	Triggers	
0	Errors	You do not have any connection defined yet.
ł	Exalate Notifications	Create a new connection
0	License Details	
0	Bulk Connect	Documentation EULA Support Report a bug
:=	Sync Queue	Powered by Exalate v. 5.4.9 (Core v. 5.4.9)
Ť	Clean-up Tools	

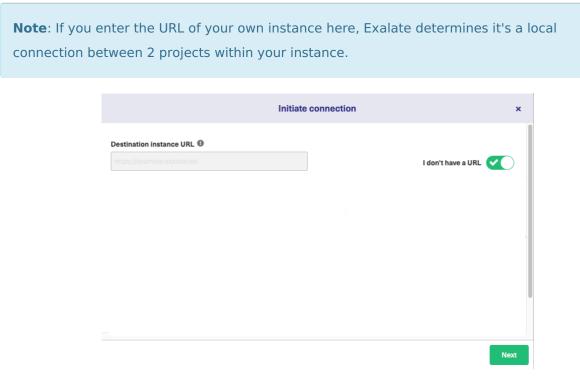
Click Connections.

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.



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

4. Select **Basic**.

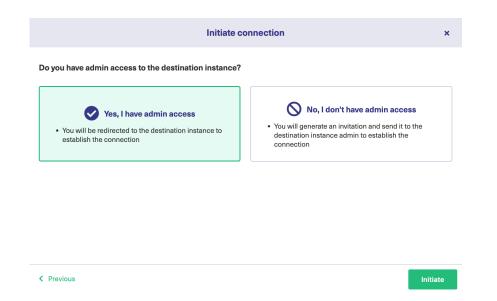
estination instance URL		
ttps://example.exalate.com	Ø	I don't have a URL 🔵 🗙
hoose the configuration type Resic • Automatic configuration of basic fields • Sync rules cannot be edited	Visual Low-code, visual interface Configure both sides of the connection using a single interface	Grooy-based scripting Configure each side of the connection separately

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.



Steps for: Yes, I have Admin Access

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

	ll be required to verify access on the destination instance. After whi steps on the destination instance.	ch complete
7. Select the pr	oject or repository where you want to sync entities.	
	ng the project or repository is not applicable to all platforms. In this ill be established after the previous step.	case, the
	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.

Exalate	×
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	
	Exalate

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.

Initiate connection	×
On the "company B" side, you (or their application administrator) need to Accept the Invitation. Use the following invitation code: Copy invitation code	
	Done

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.

Please paste the invitation code, received from your partner Enter the invitation code
evipbnZpdGF0aW9uU2VjcmV0joiNUI2SnpGckZHZGhqZlNrVGlQb1NKN3pablp0clV3MWUiLCJpbnZpdGVkSW5zdGFuY2VVaWQiO i/mMDYwYmE2Yy0xNTg5LTQxNDUtYTk2MS03MGlzNWUyMjgzZjQiLCJub2RlSW5mbyl6eyJuYW1IIjoibmFib28iLCJiYXNIVXJsIjoiaH R0cHM6Ly9qY2xvdWRub2RlLWxxZ2Ytb3Zzei14c250LXFicmEuZXhhbGF0ZS5jbG912ClsImlzc3VIVHJhY2tlcIVbCl6Imh0dHBzOi8v bmFib28uYXRYXNzaWFuLm5idClsIm5vZGVUeXBIIjoiSklSQV9DTE9VRCIsImlzc3VIVHJhY2tlcIZIcnNpb24iOil3LJAuMCIsIm5vZGVB cHBWZXJzaW9uIjoiMS4vLjAiLCJub2RlVmVyc2Ivbil6IjUuMy4zIiwiZXhhbGF0ZVBsdWdpbIZIcnNpb24iOil1LjMuMQIsIm1pbkh1Yk9ia mVjdHNWZXIzaW9uIjoiMS4vLjAiLCJtVXhIdWJPYmpIY3RzVmVyc2Ivbil6IjEuMTQuMCIsImtpbIJIc3RWZXIzaW9uIjoiMS4vLjAiLCJtY XhSZXN0VmVyc2Ivbil6IjUuMi4wliwicG9sbE9ubHkiOmZhbHNILCJIeGFDb21wVmVyc2Ivbil6IjUuMy40liwicmF3RXhhQ29tcF2IcnNp b24iOi1LJMuNCIsImuc3RhomNIVWIkIjoiODdiZWE2MWIYTK2Mi00YjdiLW11NzUt2jE5MDRiOGU02DA3IiwiZWRpdG9yIjp7ImFkb WiuUHJvb2ZVcmxUZW1wbGF0ZSI6Imh0dHBzOi8vbmFib28uYXRsYXNzaWFuLm5idC9sb2dpj9yZWRpcmVjdENvdW50XHUwMD NkMvx1MDAyNmRlc3QtdXJsXHUwMDNkaHR0cHMIM0EIMkYIMkZuYWJvby5hdGxhc3NpYW4ubmV0JTJGcGx1Z2lucyUyRnNIcn
Next

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

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12. Click **Confirm**.

The Connection has been set up.

Exalate

×

Connection established successfully \checkmark

Sync your first issue to see how it works.

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

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