

Initiate a Private Connection in Basic Mode for Zendesk

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Note: For Private Connections:

- an instance you have access to is considered a public side.
- an instance you don't have access to is considered a private side: destination instance.

The main difference between private and public connection types is whether the HTTP/HTTPS requests are initiated from one side or from both sides. In this case, HTTP/HTTPS requests are initiated from the destination's private side only.

Introduction

Connections in Basic mode have a set of **Sync Rules**, generated by Exalate.

With these connections, you can sync certain ticket types: questions, incidents, problems, and tasks. Ticket types are mirrored: questions are synced as questions, incidents as incidents, and so on.

Exalate syncs a basic set of ticket fields: summary, description, comments, and attachments.

If the entity types don't match on the destination instance, Exalate syncs an entity type based on the default entity type set in the destination instance.

All public and internal comments are synced as public.

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 Private Connection from Zendesk

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

To navigate to the **Connections** tab:

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

+ Add

Dashboard

Updates to your tickets
No recent updates.

Open Tickets (current)
1 YOU, 523 GROUPS

Ticket Statistics (this week)
0 GOOD, 0 BAD, 0 SOLVED

Tickets requiring your attention (501) [What is this?](#)

ID	Subject
Priority: Urgent	
#81	Test ticket
#83	Demo

Click **Connections**.

exalate

example.exalate.net

- Getting Started
- General Settings
- Connections**
- Entity Sync status
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- Errors
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- License Details
- Bulk Connect
- Sync Queue
- Clean-up Tools

Connections

Connection defines synchronization behavior, including communication details, sync rules, and scope.

[Initiate connection](#) [Accept invitation](#) [Refresh](#)

You do not have any connection defined yet.

[Create a new connection](#)

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Powered by Exalate v. 5.4.9 (Core v. 5.4.9)

2. Click **Initiate Connection**.

Connections

Connection defines synchronization behavior, including communication details, sync rules, and scope.

[Initiate connection](#) [Accept invitation](#) [Refresh](#)

3. Click **I don't have a URL**

If the destination instance is in a private network click **I don't have a URL**. Exalate suggests available connection types based on the destination instance's version of Exalate.

Initiate connection

Destination instance URL

https://example.exalate.net

I don't have a URL

Next

4. Choose a **Basic** connection mode.

5. Click **Next**.

6. Click **Next**.

Note: As this is a Public-Private connection and you don't have admin access to the other side, you can continue to configure on your end and then send an invitation to your partner.

7. Click **Copy Invitation Code**

Here you can copy the invitation code and send it over to your partner. The destination side are shown as "unknown" since this is a private side.

Initiate connection

Ensure that Exalate is installed on the destination side "unknown"

On the "unknown" side, you (or their application administrator) need to Accept the Invitation.

Use the following invitation code:

Copy invitation code

Done

8. Click **Done**

Once your partner accepts the invitation, you can start synchronization.

Note: When the connection is set up on the Public source side, the Private side administrator should accept the invitation in the Private-Public connection.

To do so, click on the **Accept invitation** button in the **Connections** tab of the Exalate Admin Console and paste the copied invitation code.

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