

Initiate a Private Connection in Basic Mode for Salesforce

Last Modified on 03/13/2024 5:50 am EDT

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

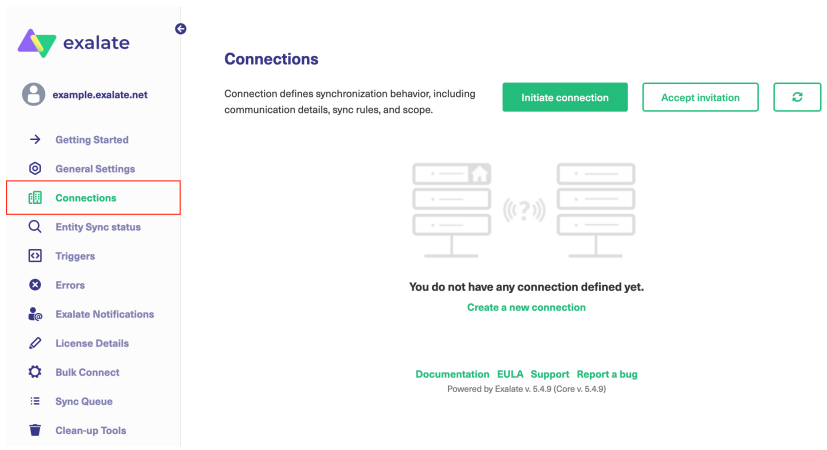
Connections in Basic mode have a set of **Sync Rules**, generated by Exalate. In Basic connections, you can only sync **cases**.

Note: You cannot modify **Sync Rules** in Basic Mode.

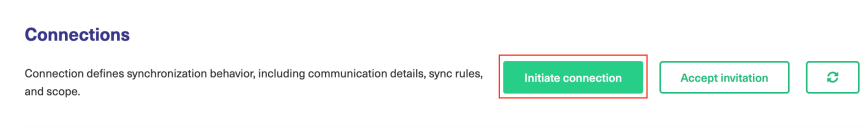
If you want to edit/delete Sync Rules, you can upgrade the connection to Visual Mode or Script Mode.

Initiate a Private Connection from Salesforce

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

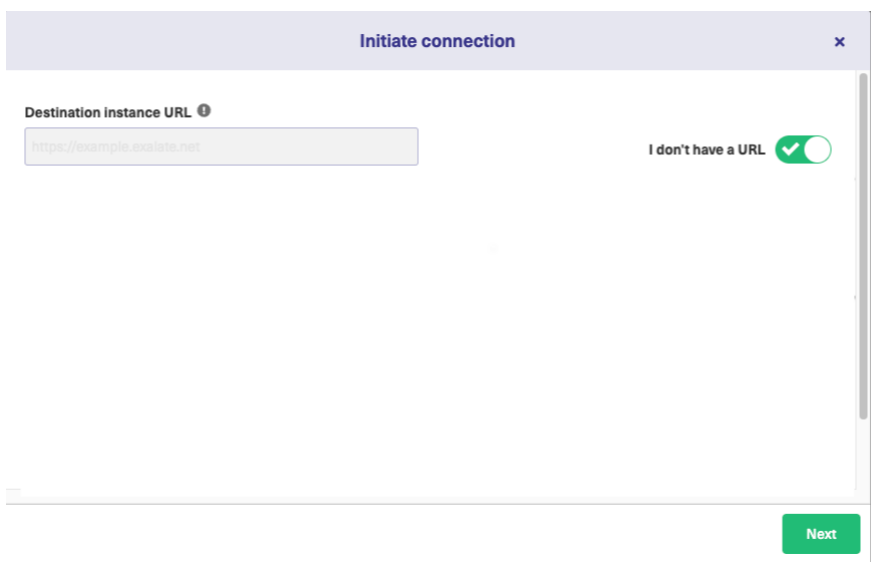


2. Click **Initiate Connection**.



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.




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

Initiate connection ✕


Destination instance URL ⓘ

✓ I don't have a URL

Choose the configuration type

 **Basic**

- Automatic configuration of basic fields
- Sync rules cannot be edited
- Only issues can be synced
- Recommended for use cases of basic complexity

 **Script**

- Groovy-based scripting
- Configure each side of the connection separately
- Recommended for use cases of basic to advanced complexity

Next


5. Click **Next**.

Initiate connection ✕


Destination instance URL ⓘ

✓ I don't have a URL

Choose the configuration type

 **Basic**

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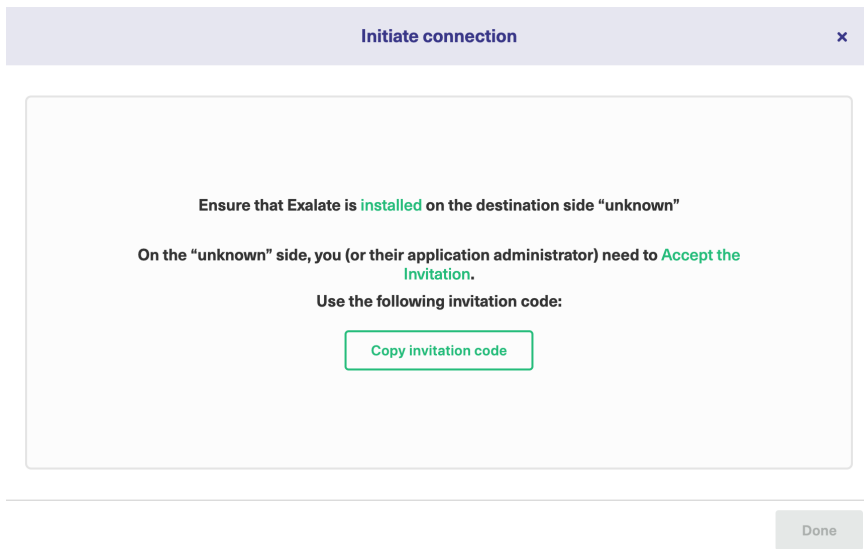
Next

8. 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.

9. Click **Copy Invitation Code**

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



10. 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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