

# Install Exalate for Zendesk

Last Modified on 11/23/2022 9:52 am EST

## Introduction

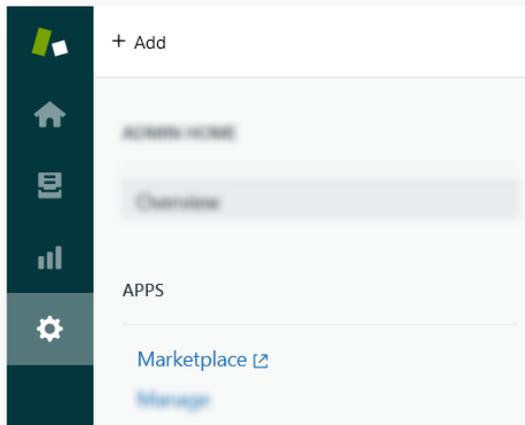
You can

- install Exalate on Zendesk from the Marketplace

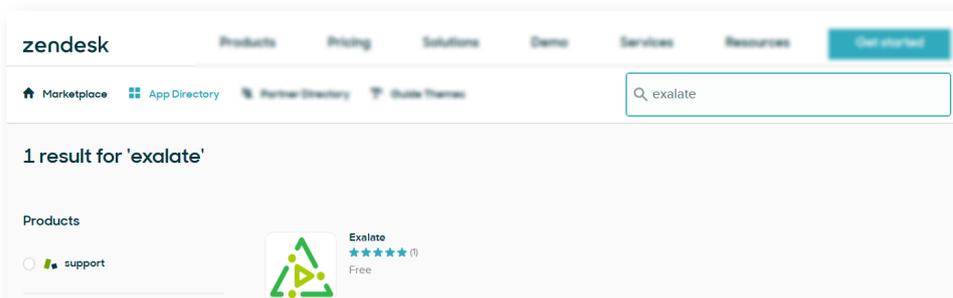
Then proceed to generate an Access token that needs to be used at the time of the App installation. Next, configure the proxy user permissions.

## Install Exalate on Zendesk from the Marketplace

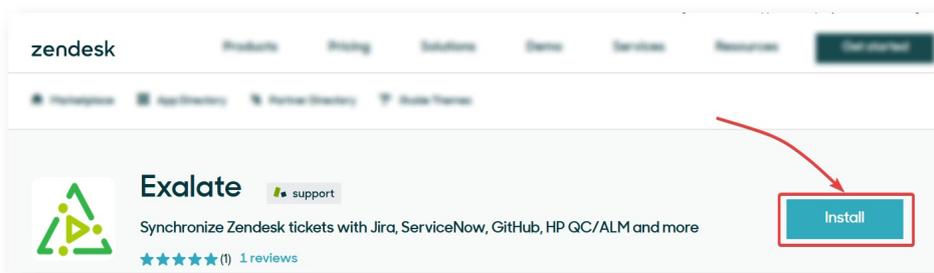
1. Log in to your Zendesk account.
2. Navigate to  → **Marketplace** in the **Apps** section.



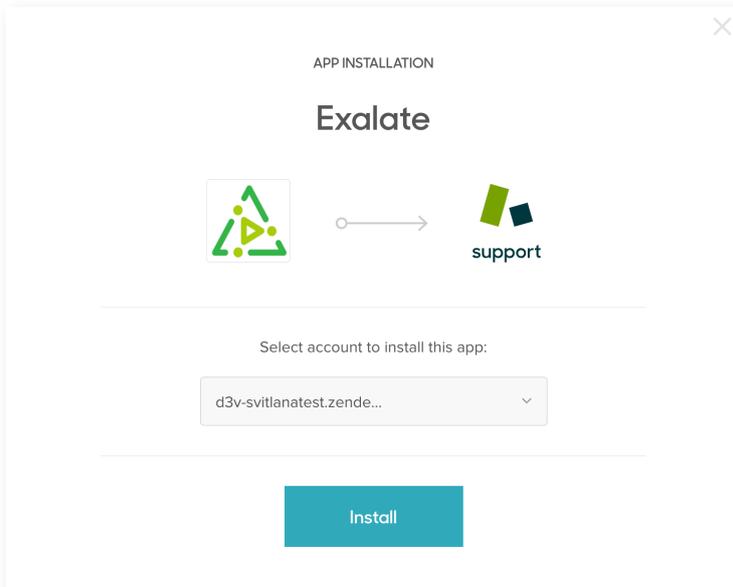
3. Find Exalate in the Marketplace.



4. Click **Install** to begin the installation.

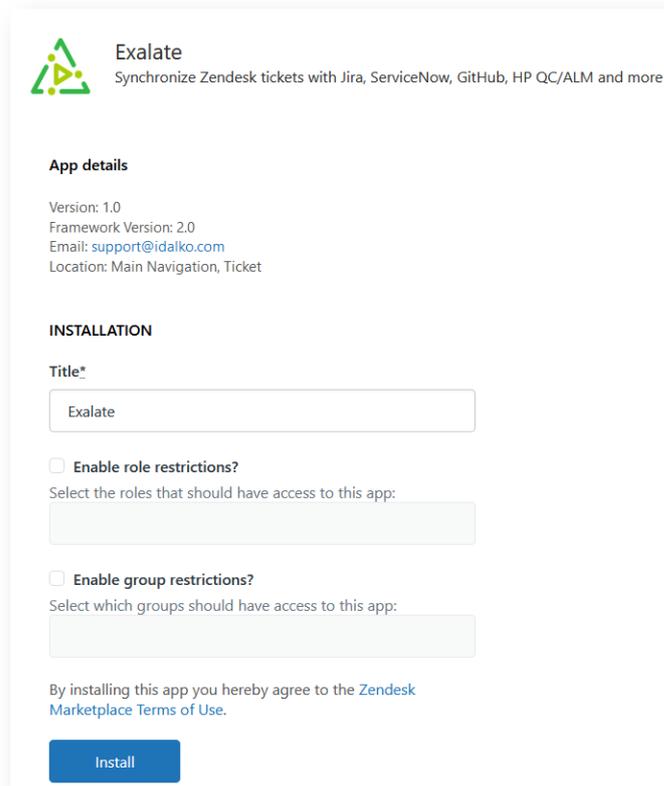


5. Select an account you want to install the app with (applicable only if you have multiple Zendesk accounts) and click **Install**.



6. Configure the app before installation.

Before installing the app, you will be able to update the name of the app and set which roles and groups will be able to access it.



**Exalate**  
Synchronize Zendesk tickets with Jira, ServiceNow, GitHub, HP QC/ALM and more

**App details**

Version: 1.0  
Framework Version: 2.0  
Email: [support@idalko.com](mailto:support@idalko.com)  
Location: Main Navigation, Ticket

**INSTALLATION**

Title\*

**Enable role restrictions?**  
Select the roles that should have access to this app:

**Enable group restrictions?**  
Select which groups should have access to this app:

By installing this app you hereby agree to the [Zendesk Marketplace Terms of Use](#).

**Field descriptions:**

**Title**

Your custom name of the app. Required field. The default value for the field is

**Enable role restrictions?**

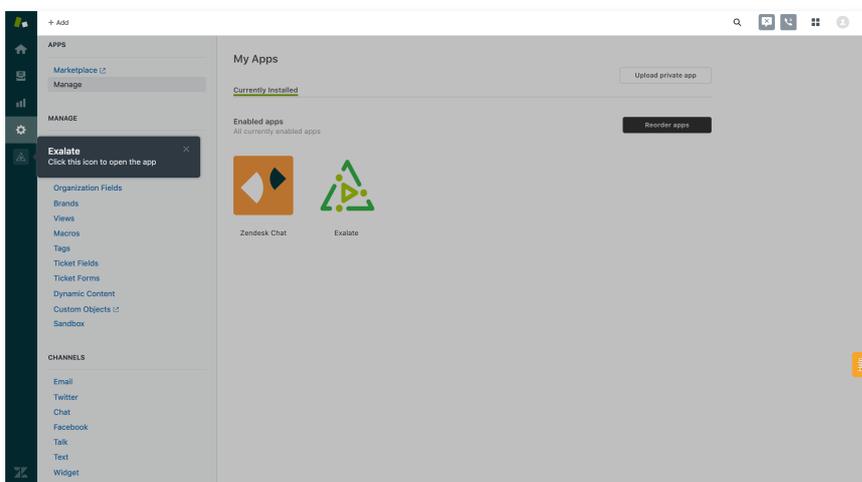
If checked, you can set which roles can access the app.

**Enable group restrictions?**

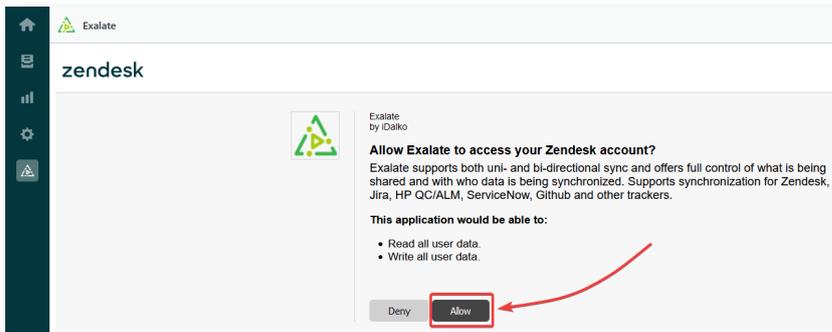
If checked, you can choose which user groups can access the app.

7. Click **Install**.

8. Select **Exalate** in the side panel.



9. Click **Allow** to confirm that Exalate can have access to read and write your data.



10. Input your credentials in the **Registration** screen.

Exalate uses this info to:

- Verify your instance.
- Activate an evaluation license.
- Create an admin account to receive error notifications.

A screenshot of the 'Registration' screen. The title 'Registration' is at the top. Below it are four input fields: 'Email', 'Contact name', 'Organization', and 'Phone'. Each field has a small red asterisk indicating it is required. Below the input fields, there is a paragraph of text: 'By clicking Agree and submit below, you agree to our end user license agreement - available [here](#)'. At the bottom of the form is a green button with the text 'Agree and submit'.

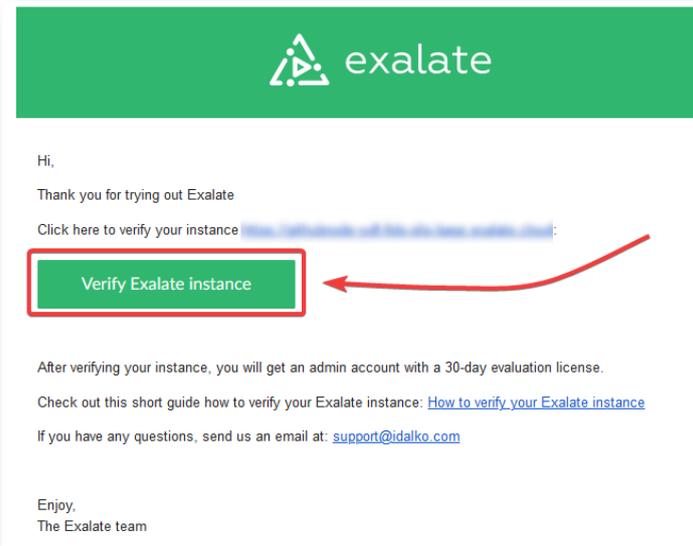
11. Select **Agree and submit**.

After selecting **Agree and submit** you will get an email to complete our security check.

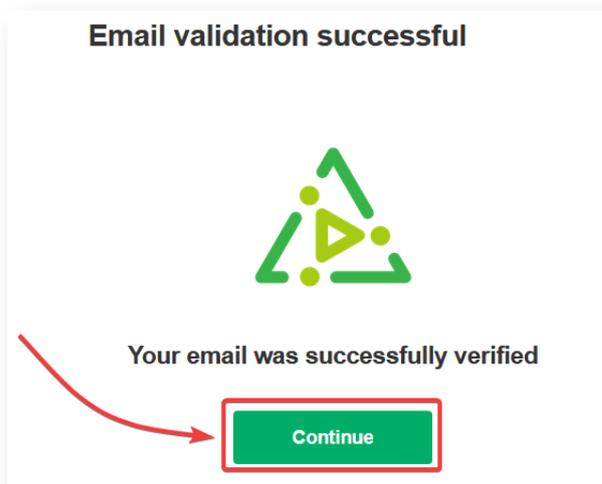
After clicking **Agree and submit** you will accept our End User License Agreement (EULA). You can read it here:  
<https://static.idalko.com/legal/eula-addons.pdf>

12. Open your email and select **Verify Exalate instance**.

You will be redirected back to your Exalate console.



14. Select **Continue**.



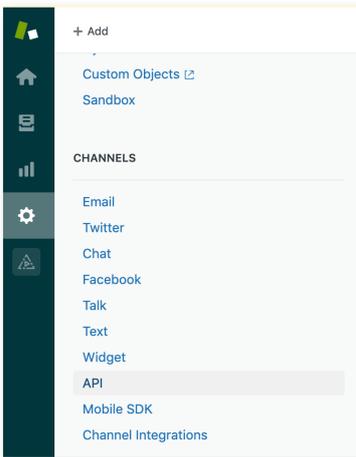
Congratulations! The app is installed.

## How to Generate an Access Token?

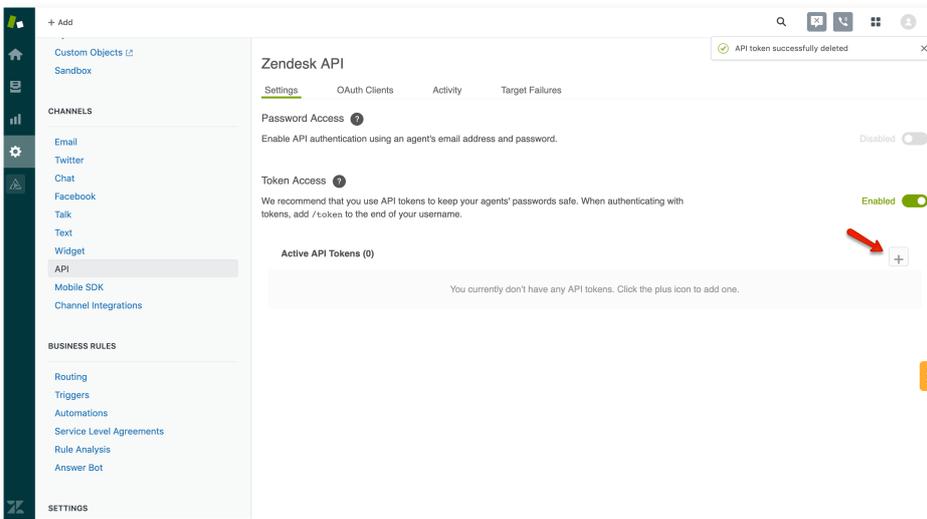
1. Log in to your Zendesk admin as a proxy user

It's important to generate the token as a [Proxy User](#).

2. Navigate to Channels - API tab

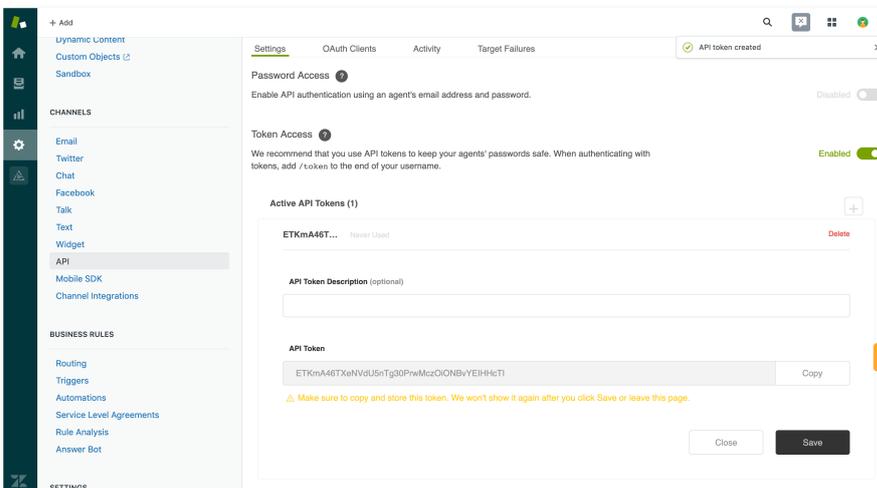


### 3. Generate the access token



Once the token has been generated, you can copy it and proceed with the app installation.

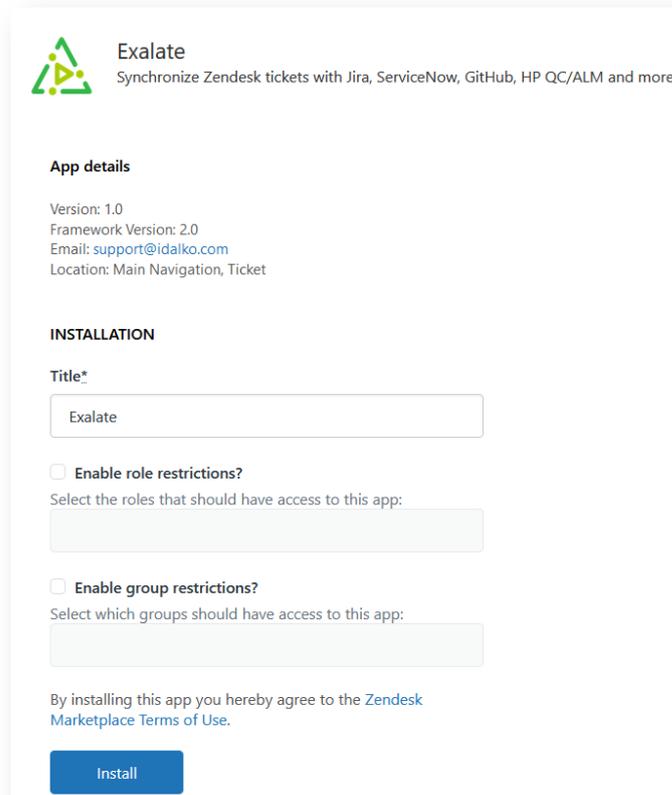
The token will be used during the Exalate app installation.



# Proxy User Permissions

Exalate requires a dedicated Zendesk admin as a proxy user.

The proxy user can restrict the roles or groups that can access Exalate. It is possible when installing the app or when managing the app settings.



The screenshot shows the installation configuration page for the Exalate app. At the top left is the Exalate logo, a green triangle with a play button icon. To its right, the text reads "Exalate" and "Synchronize Zendesk tickets with Jira, ServiceNow, GitHub, HP QC/ALM and more". Below this is the "App details" section, which lists: "Version: 1.0", "Framework Version: 2.0", "Email: support@idalko.com", and "Location: Main Navigation, Ticket". The "INSTALLATION" section follows, starting with a "Title\*" field containing the text "Exalate". There are two unchecked checkboxes: "Enable role restrictions?" and "Enable group restrictions?". Below each checkbox is a text prompt and an empty selection box: "Select the roles that should have access to this app:" and "Select which groups should have access to this app:". At the bottom of the form, there is a line of text: "By installing this app you hereby agree to the [Zendesk Marketplace Terms of Use](#)." and a blue "Install" button.

## Video Tutorial

[Introduction](#)

[Install Exalate on Zendesk from the Marketplace](#)

[How to Generate an Access Token?](#)

[Proxy User Permissions](#)

[Video Tutorial](#)

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