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.





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**.

APP INSTALLATION	×
Exalate	
support	
Select account to install this app:	
d3v-svitlanatest.zende Y	
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.

À	Exalate Synchronize Zendesk tickets with Jira, ServiceNow, GitHub, HP QC/ALM and more
App det	tails
Version: Framewo Email: su Location	1.0 ork Version: 2.0 Ipport@idalko.com : Main Navigation, Ticket
INSTALL	ATION
Title <u>*</u>	
Exalat	te
Select th	ole role restrictions? ne roles that should have access to this app:
Enat	ble group restrictions?
Select w	hich groups should have access to this app:
By instal Marketp Ir	lling this app you hereby agree to the <mark>Zendesk</mark> blace Terms of Use. hstall

Field descriptions:

Title

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

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.

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8	Marketplace (2 Manage	Upload private app			
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	Exate × Citch this (on to seen the app Organization Fields Brands Views Macros Tapa Ticket Finds Ticket Finds Ticket Finds	Zandesk Churi Exatite			
	Sandbox				
	CHANNELS				da Maria
	Email				
	Chat				
	Facebook				
	Talk				
	Text				
ZK	Widget				

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.

Registration
Email 🕕 🔹
Contact name *
Organization *
Phone *
By clicking Agree and submit below, you agree to our end user license agreement - available here
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.

	🚵 exalate
Hi.	
Thank	you for trying out Exalate
Click h	iere to verify your instance
After v	Verify Exalate instance
Check	out this short quide how to verify your Exalate instance: How to verify your Exalate instance
lf you l	have any questions, send us an email at: <u>support@idalko.com</u>
Enjoy, The Ex	xalate team

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

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f	Custom Objects ⊠ Sandbox	Zendesk API	 API token successfully deleted 	×
9 11	CHANNELS	Settings OAuth Clients Activity Target Failures Password Access		
٥	Email Twitter	Enable API authentication using an agent's email address and password.		Disabled
æ	Chat Facebook Talk	Token Access We recommend that you use API tokens to keep your agents' passwords safe. When authenticating with tokens, add / token to the end of your username.		Enabled 🚺
	Text Widget API	Active API Tokens (0)		+
	Mobile SDK Channel Integrations	You currently don't have any API tokens. Click the plus icon to a	dd one.	
	BUSINESS RULES			
	Routing Triggers Automations			daH
	Service Level Agreements Rule Analysis			
75	Answer Bot			

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.

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♠ ⊒	Uynamic Content Custom Objects 🕑 Sandbox	Settings OAuth Clients Activity Target Failures Image: Client Clients API token created Password Access Image: Client Clients Image: Client Clients Image: Client Clients <		×
ıl ¢	CHANNELS Email Twitter Chat	Token Access We recommend that you use API tokens to keep your agents' passwords safe. When authenticating with tokens, add / tokens to the end of your username.	Enabled	D
	Facebook Talk Text Widget	Active API Tokens (1) ETKmA46T Here Used	+ Delete	
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	BUSINESS RULES	AP! Token		•
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ZK	SETTINGS			

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.

App det	ails		
Version: Framewo Email: su Location	I.0 rk Version: 2.0 pport@idalko.com Main Navigation, Ticket		
INSTALLATION			
Title <u>*</u>			
Exalat	e		
Enak	le role restrictions?		
Select th	e roles that should have access to this app:		
Enab	le group restrictions?		
Select w	hich groups should have access to this app:		

Video Tutorial

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Proxy User Permissions

Video Tutorial