Install Exalate for Salesforce

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Introduction

In this article, we are going to show you how to:

- Install Exalate on Salesforce from the AppExchange
 - Generate a security token to log into the Exalate Admin console on Salesforce.
- Install Exalate on Salesforce on Docker.

Install Exalate on Salesforce from the AppExchange

Note: When installing Exalate for Salesforce, the account used to initiate the installation will automatically be designated as the proxy user. If you plan to use an Integration User, ensure that the user is created and set up beforehand, then proceed with the installation using that account.

This article describes how to install Exalate to Salesforce from the AppExchange marketplace.

- 1. Access the AppExchange marketplace and search for the Exalate app
- 2. Click Get it Now to install it on Production



or Click Try It Free to install it on Sandbox



Note: For alternative installation on the Sandbox instance, append /packaging/installPackage.apexp?p0=04tQs00000014hVIAQ to your sandbox URL.

For example: https://{mydomain-sandbox.salesforce.com}/packaging/installPackage.apexp?p0=04tQs00000014hVIAQ

3. Confirm installation details

Where do you want	to install this package?
Install in a Prod	luction Environment
Install this package in the org where you or y	our users work, including Developer Edition orgs.
* Connected Salesforce Accounts ()	
fallige altifuzion des Bildalles com	¢ C
Don't see your account? More Info	
Install in	n Production
	Cancel

- Fill out the required fields
- Check that you have read and agree to the terms and conditions
- Click Confirm and Install

S APPE	XCHANGE HOME 🔻	Search AppExchange	
All App Exalate C	S Connector for Salesforce, Jira, Ser	viceNow, AzureDevOps, GitHub, Zendesk	by Exalate
Confirm	n installation details Exalate Conn	ector for Salesforce, Jira, ServiceNow, AzureDevO Zendesk ?	os, GitHub,
	Review the customization guide	for installation and configuration steps.	
	package Exalate Bridge App v2 Subscription	Version ver 0.5 / 0.5.0 Organization	
	Free Duration Does Not Expire	Exhale BV Number of Subscribers site-wide	
	User Name jose@exalate.sandbox		
	Tell us about yourself First Name	• Email	
	• last name	Phone	
	Job Title	Country Choose	
	• Company	•State Choose	
	* ✓ I have re Salesforce.com Inc. is not the provider of th about t	ad and agree to the terms and conditions . his application but has conducted a limited security review. Learn Mo he AppExchange Security Review .	ore
	Allow the provider to contact me b	y email, phone, or SMS about other products or services I might like	
	C	Confirm and Install	

4. Log in to your Salesforce $\mbox{accoun}\,t$

You are automatically redirected to the Salesforce login screen once you confirm the installation

	sales	force	
Username			
user@exa	mple.com		
Password			
••••••			
	Log	In	
🗌 Remem	ber me		

5. Select a group of users that has permission to use the Exalate app

If you install Exalate for **Admins Only**, only the administrators have permission to use Exalate. You can grant permissions to other users later. Check out How to manage users' permissions in Exalate for Salesforce.

Installing Exalate for **All Users** grants permission to use the app to all registered users.

If you choose to install Exalate for **Specific Profiles**, you see the list of the available profiles and their permissions that should be set before you proceed.



6. Click Install

7. Approve third-party access

Approve Third-Party Access				
This package may send or receive data from third-party websites. Make sure you trust these websites. What if you are unsure?				
Website	SSL Encrypted			
connect.exalate.net	\checkmark			
Yes, grant access to these third-party web sites Continue Cancel				

- Check Yes, grant access to these third-party websites
- Click Continue

8. Installation complete. Click Done to go back to your Salesforce instance

By Exalate	Exalatebridg	еАрр	
i Installat	ion Complete!		
			Done
App Name	Publisher	Version Name	Version Number
	Evolata	110	11

9. Add new trusted URL

- Go to Setup and search for Trusted URLs
- Click Add new trusted URL

Trusted URLs	
Trusted URL Information	I '= Required Information
API Name 😡	qa
URL	*.exalate.cloud
Description	
Active Ø	0
Content Security Policy (CSP) Settin	gs
To help prevent cross-site scripting (XSS) a CSP context.	nd other code injection attacks, the Lightning component framework uses CSP to impose restrictions on content. To control which pages can load content from this trusted URL, select the
CSP Context CSP Directives	
Select the directives that Lightning compon within Lightning or within your CSP-secured	ents, third-party APIs, and WebSocket connections can load from this trusted URL. Each CSP directive controls access to a resource type. Lightning components can load the resources 1 <u>Aura or LWR sites</u> .
To use the <u>Salesforce Console Integration</u> select that directive, connections from Light from a third-party, add the third-party URL t	Toolis from within this trusted URL, select the connect-arc (scripts) directive. Then add the trusted URL in the Security settings of Experience Builder for your <u>Visualforce sites</u> . When you ning to this trusted URL can use the Javascript methods in the tookit. Otherwise, you can't load JavaScript resources from a third-party, even if it's a trusted URL. To use a JavaScript Iterrary a static resource, and then add the static resource to your component.
connect-src (scripts) 6	
font-src (fonts)	
frame-src (iframe content) 0	
img-src (images)	
media-src (audio and video)	
style-src (stylesheets)	2
Permissions Policy Directives	

- Fill in Trusted URL Information:
 - API Name: free input string
 - URL: *.exalate.cloud
- Check all the boxes in **CSP Directives** section
- Click Save

10. Next, you need to set the Permissions. Go to **Setup> Permission sets**.

Permission Sets					
Permissi	on Sets			Help for this Page 🥹	
On this page yo	u can create, view, and manage permission sets.				
In addition, you	can use the SalesforceA mobile app to assign perr	nission sets to a user. Download SalesforceA from th	ie App Store or Google Pl	ay: iOS I Android	
All Permissio	n Sets V Edit I Delete I Create New View			8	
New		A B C) D E F G H I J K	X L M N O P Q R S T U V W X Y Z Other All	
Action	Permission Set Label ↑	Permission Sets ~ Salesforce - Developer Edition		License	
Clone	Buyer	Allows access to the store. Lets users se	ee products and categorie	B2B Buyer Permission Set One Seat	
Clone	Buyer Manager	Includes all Buyer capabilities, and allow	vs access to manage cart	B2B Buyer Manager Permission Set One Seat	
Clone	CRM User	Denotes that the user is a Sales Cloud of	or Service Cloud user.	CRM User	
Clone	Commerce Admin	Allow access to commerce admin feature	es.	Commerce Admin Permission Set License Seat	
Clone	Contact Center Admin	Manage Service Cloud Voice contact ce	nters that use Amazon C	Service Cloud Voice User	
Clone	Contact Center Agent	Access agent features in Service Cloud	Voice contact centers tha	Service Cloud Voice User	
Clone	Contact Center Supervisor	Access supervisor features in Service C	loud Voice contact center	Service Cloud Voice User	
Clone	Exalate Admin			Salesforce	
Clone	Exalate Liser				

To assign a permission set to a user, go through these steps: **Exalate Admin > Manage Assignments > Add assignment > Select User with System Administrator Profile > Assign > Done**.

11. Create the New External Client App

The next step is to create the New External Client App. Go to **Setup > Apps> App Manager** and click on **New External Client App**.

	SETUP Lightning Experience Ap	p Manager	ACTING AND	New Lightni	ing App New Ext	ernal Client App
24 ite	ms • Sorted by App Name • Filtered by All ap	opmenuitems - TabSet Type, A	pp Type		A	
	App Name T V	Developer Name V	Description	Last Modifi 🗸	App Type	∽ Vi ∽
1	All Tabs	AllTabSet		14.01.2025, 18:16	Classic	
2	Analytics Studio	Insights	Build CRM Analytics dashboards and apps	14.01.2025, 18:16	Classic	✓ ▼
3	App Launcher	AppLauncher	App Launcher tabs	14.01.2025, 18:16	Classic	 ✓
4	Approvals	Approvals	Manage approvals and approval flows	14.01.2025, 18:16	Lightning	< <
5	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for yo	14.01.2025, 18:20	Lightning	 ✓
6	Community	Community	Salesforce CRM Communities	14.01.2025, 18:16	Classic	 ✓
-	0	^	0-1	14 01 0005 10:10	0	

Fill in these fields:

- External Client App Name
- API Name
- Contact Email
- In API (Enable OAuth Settings), check Enable OAuth Settings
- In the **Callback URL** field paste: https://connect.exalate.net/rest/oauth/callback
- Select and add all rows in Selected OAuth Scopes
- Require Secret for Web Server Flow should be selected
- Require Secret for Refresh Token Flow is optional

Important: Do not select Require Proof Key for Code Exchange (PKCE)!

In case this field is not editable, or this feature is required by your organization, please contact support for help with the additional steps required.

This issue is being addressed and will be resolved in an upcoming release.

C Enable OAuth			
App Settings Caliback URL			
https://connect.exalate.net/rest/oauth/callback			
• OAuth Scopes		Selected Quith Scopes	
	•	Access the identity URL service (id, profile, email, address, phone)	
		Manage user data via APIs (api)	
	4	Manage user data via Web browsers (web)	
		Full access (full)	
		Access Connect REST API resources (chatter_api)	
		Access Visualforce applications (visualforce)	
Introspect all Tokens			
Configure ID token			
Flow Enablement			
Enable Client Credentials Flow			
Enable Device Flow			
Enable JWT Bearer Flow			
Enable Token Exchange Flow			
Security			
Require secret for Web Server Flow			
Require secret for Refresh Token Flow			
Require Proof Key for Code Exchange (PKCE) extension for Supported Authorization Flows			
Enable Refresh Token Rotation			

Click **Create** when done.

Important: Wait 10-20 minutes after creating the External Client App Name for the changes to be fully applied.

Go to Setup > Apps> External Client Apps > External Client App Manager > Your created App > Settings > OAuth settings and collect the Consumer Key and Consumer Secret from the External Client App.

✓ OAuth Settings		
App Settings Consumer Key and Secret		
*Callback URL		
https://connect.exalate.net/rest/oauth/callback		
	11	
OAuth Scopes		
Available OAuth Scopes		Selected OAuth Scopes
	►	Access the identity URL service (id, profile, email, address, phone)
	4	Manage user data via APIs (api)
		Manage lieer data via Web broweere (web)

Consumer De	etails
-------------	--------

Consumer Key	
Consumer Secret	

12. Request an Exalate node

Once the application is installed, you can request an Exalate node:

• Access the Exalate app from the search bar

-	All 💌 Q. Search
Service Home Chatter Account	s 🗸 Contacts 🗸 Cases 🗸 Reports 🗸 Dashboards 🗸
C Exalate S	GOAL /
Items Exalate Settings View All	
2.1m 1.4m	
700k 0 Apr	May Jun Closed = Goal Closed + Open (>70%)

• Copy the **Consumer Key** and **Secret** from the External Client App and paste here, then click on **Request Node**.

			[Q Search					* *	₽⇔	? \$	þ 🗜	6
	Exalate	Exalate Console	SAL ZHZENIGU N		- CHLONIGI (N	NSMA HUGOS - 1130	SAN 11115	SULLET A NAME	JUNIT JEW	-711-7711	es uch	× 11:3000	1111151 C
Ŕ	Exalate (Console					<u></u>						
We	are preparing	to create a node in t	he background, please w	ait									
C0	nsumer Kev		ne baokground, picase i										
	illumini illuj												
Co	nsumer Secret												
	Request Node												

• Click **Allow** on the app permissions.



- Manage hub connections
- Manage Pardot services
- Access Lightning applications
- Access content resources
- Manage Data Cloud Ingestion API data
- Manage Data Cloud profile data
- Perform ANSI SQL queries on Data Cloud data
- Access chatbot services
- Perform segmentation on Data Cloud data
- Manage Data Cloud Identity Resolution
- Access Headless Forgot Password API
- Manage Data Cloud Calculated Insight data
- Access Headless Registration API
- Access the Salesforce API Platform
- Access Interaction API resources
- Access all Data Cloud API resources
- Perform requests at any time

Do you want to allow access for

teja.buthada@exalate.com? (Not you?)

Deny	Allow

To revoke access at any time, go to your personal settings.

After you allow the permissions you are being redirected back to the Salesforce interface.

Note: Exalate console may render in a few minutes.

13. Configure Exalate for Salesforce

Once you have requested the node it is time to configure it. Follow the steps listed below:

1. Fill in your contact information in the registration form. Exalate sends you a verification email. With this info Exalate:

- Verifies your instance.
- Activates an evaluation license.
- Makes an admin account to receive error notifications.

*	Q Search
Exalate Exalate Console	
Exalate Console	
A exalate	Registration
exalate-a5-dev-ed.dev	Email 0 • user@example.com
C Registration	Contact name*
	User
	Organization*
	Exalate
	Phone*
	12-123-1234
	By clicking Agree and submit below, you agree to our End User License Agreement
	More Integrations Documentation EULA Support Report a bug Powered by Exalate v. 5.5.5 (Core v. 5.5.5)

2. Click **Agree and submit**, to agree to the EULA and continue.

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

Click **Resend email** if you have not received a confirmation email. Click **Change email** to modify the email address provided earlier.

Note: If you encounter an error during verification, check out Solving issues with email verification.

3. Open your email and click Verify Exalate instance

to	5:04 PM (0 minutes ago)	☆	÷	:	
A exalate					
Hi,					
Thank you for trying out Exalate					
Click here to verify your Exalate node:					
Verify Exalate instance					
After verifying your instance, you will get an admin account with a 30-day evaluation license.					
Use this link to access the Exalate admin console: https://salesforcenode-ggal-galg-hevr-iwsa.exalate.cloud					
Check out this short guide how to verify your Exalate instance: How to verify your Exalate instance					

4. Once you receive the email and verify the registration of the node, you are redirected to the Exalate **console admin > Connections** screen.

Congratulations! The registration process has been completed.

Install Exalate for Salesforce on Docker

You can host Exalate for Salesforce on your own server. To do so, you need to install Exalate on Docker.

Note: You need to install Docker. Check the docker documentation for more details.

1. How to install Exalate for Salesforce on Docker?

- 1.1. Create or download the docker-compose.yml
- 1.2. Ensure that a correct database is set up using a createdb.sh
- 1.3. Set environment variables if necessary

- 1.4. Register the node
- 1.5. Start the application
- 2. Troubleshooting

Note: Check out the how to host Exalate for Salesforce on your own server detailed guide.

Video Tutorial

Release History ?Glossary ?API Reference ?Security ?Pricing and Licensing ?ResourcesSubscribe for a weekly Exalate hack ?Academy ?Blog ?YouTube Channel ?Ebooks ?Still need help?Join our Community ?Visit our Service Desk ?Find a Partner ?