

# Install Exalate for Salesforce

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## Supported Salesforce Editions

Exalate supports the following Salesforce editions:

- Developer Edition
- Enterprise Edition
- Unlimited Edition
- *Professional Edition*

For *Professional Edition* organizations, all requests for API access must be purchased according to [Salesforce guidelines](#).

Editions without API Access like *Group Edition* and *Essentials Edition* are not supported at the moment.

Exalate is fully compatible with Salesforce

- Spring '23
- Summer '23
- Winter '24
- Spring '24
- Summer '24
- Winter '25
- Spring '25
- Summer '25

## 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](#).

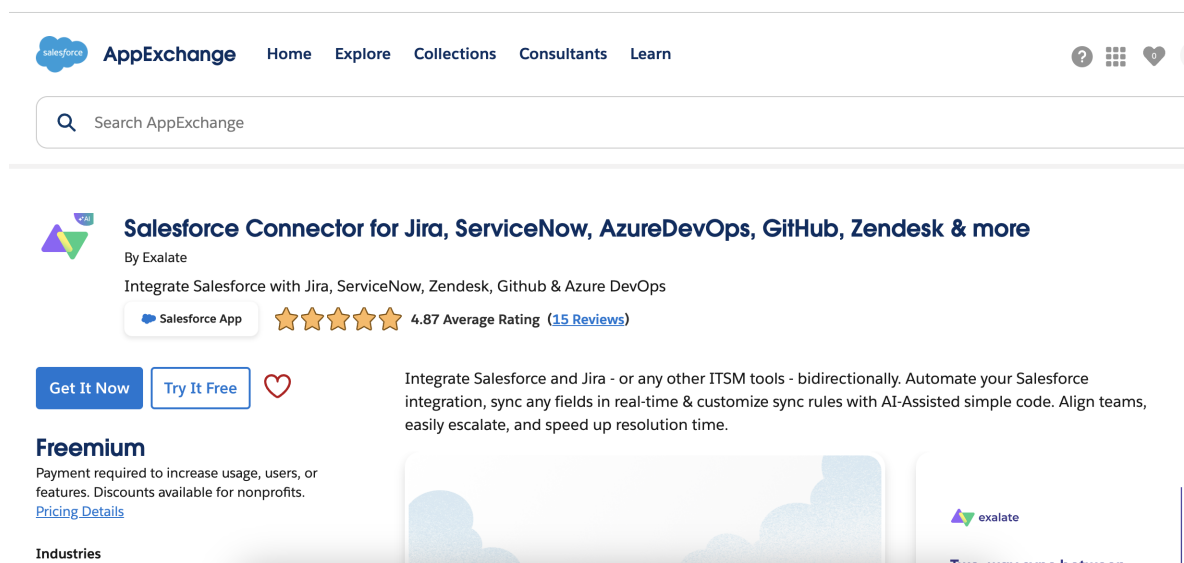
# Install Exalate on Salesforce from the AppExchange

**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**



The screenshot shows the Salesforce AppExchange interface. At the top, there's a navigation bar with 'AppExchange' and links for 'Home', 'Explore', 'Collections', 'Consultants', and 'Learn'. A search bar is present with the text 'Search AppExchange'. Below the search bar, the app 'Salesforce Connector for Jira, ServiceNow, AzureDevOps, GitHub, Zendesk & more' by Exalate is displayed. It features a 'Salesforce App' badge, a 4.87 average rating from 15 reviews, and two buttons: 'Get It Now' and 'Try It Free'. A heart icon is also visible. The description states: 'Integrate Salesforce and Jira - or any other ITSM tools - bidirectionally. Automate your Salesforce integration, sync any fields in real-time & customize sync rules with AI-Assisted simple code. Align teams, easily escalate, and speed up resolution time.' Below this, the 'Freemium' pricing model is explained: 'Payment required to increase usage, users, or features. Discounts available for nonprofits.' A link to 'Pricing Details' is provided. The 'Industries' section is partially visible at the bottom. On the right side of the app card, there's a small Exalate logo and the text 'Two-way sync between'.

or Click **Try It Free** to install it on Sandbox



## Start Your Trial

### Step 1 Choose a trial type

Here's how you can try out this solution. [Learn about trial types.](#)



#### Try in your sandbox

- Test before deploying to production
- Explore with your data & configurations
- Manage installation & setup yourself



Website  
<https://>  
Email  
[support](mailto:support)  
Phone  
[+32 3 3](tel:+3233)

### Step 2 Share your contact info

Here's what we found in your Trailblazer account. To edit anything, go your account.

First Name

Last Name

**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 Production Environment

Install this package in the org where you or your users work, including Developer Edition orgs.

\* Connected Salesforce Accounts ⓘ

[Account Name]



Don't see your account? [More Info](#)

Install in Production

Cancel

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

APPEXCHANGE HOME

All Apps
Exalate Connector for Salesforce, Jira, ServiceNow, AzureDevOps, GitHub, Zendesk
by Exalate

Confirm installation details Exalate Connector for Salesforce, Jira, ServiceNow, AzureDevOps, GitHub, Zendesk ?

*i* Review the customization guide for installation and configuration steps.

package	Version
Exalate Bridge App v2	ver 0.5 / 0.5.0
Subscription	Organization
Free	Exhale BV
Duration	Number of Subscribers
Does Not Expire	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 read and agree to the [terms and conditions](#) .

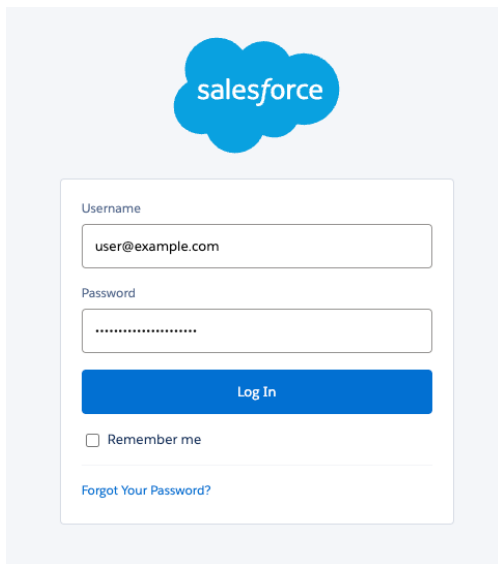
Salesforce.com Inc. is not the provider of this application but has conducted a limited security review. [Learn More about the AppExchange Security Review](#) .

☐ Allow the provider to contact me by email, phone, or SMS about other products or services I might like

cancel Confirm and Install

#### 4. Log in to your Salesforce account

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



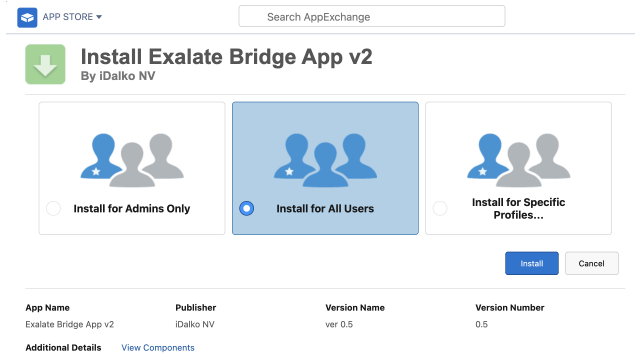
The image shows the Salesforce login interface. At the top is the Salesforce logo. Below it is a login form with fields for 'Username' (containing 'user@example.com') and 'Password' (masked with dots). A blue 'Log In' button is below the password field. There is a 'Remember me' checkbox and a 'Forgot Your Password?' link at the bottom of the form.

## 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.



The image shows the 'Install Exalate Bridge App v2' screen in the Salesforce App Store. It features three installation options: 'Install for Admins Only', 'Install for All Users' (which is selected), and 'Install for Specific Profiles...'. Below the options are 'Install' and 'Cancel' buttons. At the bottom, there is a table with app details.

App Name	Publisher	Version Name	Version Number
Exalate Bridge App v2	iDalko NV	ver 0.5	0.5

Additional Details View Components

## 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	<input checked="" type="checkbox"/>


☒ Yes, grant access to these third-party web sites

ContinueCancel

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

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

 **Install ExalateBridgeApp**  
By Exalate

 Installation Complete!

Done

App Name	Publisher	Version Name	Version Number
ExalateBridgeApp	Exalate	1.1.0	1.1

## 9. Add new trusted URL

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

- 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**.

Action	Permission Set Label	Permission Sets - Salesforce - Developer Edition	License
<a href="#">Clone</a>	Buyer	Allows access to the store. Lets users see products and categorie...	B2B Buyer Permission Set One Seat
<a href="#">Clone</a>	Buyer Manager	Includes all Buyer capabilities, and allows access to manage cart...	B2B Buyer Manager Permission Set One Seat
<a href="#">Clone</a>	CRM User	Denotes that the user is a Sales Cloud or Service Cloud user.	CRM User
<a href="#">Clone</a>	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seat
<a href="#">Clone</a>	Contact Center Admin	Manage Service Cloud Voice contact centers that use Amazon C...	Service Cloud Voice User
<a href="#">Clone</a>	Contact Center Agent	Access agent features in Service Cloud Voice contact centers tha...	Service Cloud Voice User
<a href="#">Clone</a>	Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact center...	Service Cloud Voice User
<a href="#">Clone</a>	Exalate Admin		Salesforce
<a href="#">Clone</a>	Exalate User		

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 Connected App

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

SETUP

Lightning Experience App Manager

Salesforce CRM Communities

New Lightning App

New Connected App

22 items · Sorted by App Name · Filtered by All appmenuitems - TabSet Type

	App Name ↑	Developer Name	Description	Last Modified ...	App Type	Vi...	
1	All Tabs	AllTabSet		24/07/2023, 4:36 p...	Classic		
2	Analytics Studio	Insights	Build CRM Analytics dashboards and apps	24/07/2023, 4:36 p...	Classic	✓	
3	App Launcher	AppLauncher	App Launcher tabs	24/07/2023, 4:36 p...	Classic	✓	
4	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your i...	24/07/2023, 4:38 p...	Lightning	✓	
5	Community	Community	Salesforce CRM Communities	24/07/2023, 4:36 p...	Classic	✓	
6	Content	Content	Salesforce CRM Content	24/07/2023, 4:36 p...	Classic	✓	
7	Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manag...	24/07/2023, 4:36 p...	Lightning	✓	
8	Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	24/07/2023, 4:36 p...	Lightning	✓	
9	Exalate	Exalate		24/07/2023, 4:49 p...	Lightning (Managed)	✓	
10	Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	24/07/2023, 4:36 p...	Lightning	✓	
11	Marketing	Marketing	Best-in-class on-demand marketing automation	24/07/2023, 4:36 p...	Classic	✓	
12	Platform	Platform	The fundamental Lightning Platform	24/07/2023, 4:36 p...	Classic		

Select the "Create a Connected App" option:

## Create a Connected App

To use OAuth 2.0, create an external client app. As the next generation of connected apps, external client apps provide increased security and a better user experience. Learn more about [connected apps](#) and [external client apps](#) in Salesforce Help.

### Create a Connected App

Connected Apps support plugins other than OAuth 2.0.

### Create an External Client App

External Client Apps support only OAuth 2.0 plugins.

Cancel

Continue

On the setup page, fill in these fields:

- **Connected 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.

**SETUP App Manager**

**New Connected App** [Help for this Page](#)

**Basic Information** [Save](#) [Cancel](#)

Connected App Name:  Required Information

API Name:

Contact Email:

Contact Phone:

Logo Image URL:

Icon URL:

Info URL:

Description:

**API (Enable OAuth Settings)**

Enable OAuth Settings: ☒

Enable for Device Flow: ☐

Callback URL:

Use digital signatures: ☐

Selected OAuth Scopes:

**Available OAuth Scopes**

- None-

**Selected OAuth Scopes**

- Access Analytics REST API Charts Geodata resources (eclair\_api)
- Access Analytics REST API resources (weave\_api)
- Access Connect REST API resources (chatter\_api)
- Access Einstein GPT services (einstein\_gpt\_api)
- Access Headless Forgot Password API (forgot\_password)
- Access Headless Passwordless Login API (pwdless\_login\_api)
- Access Headless Registration API (user\_registration\_api)
- Access Interaction API resources (interaction\_api)
- Access Lightning applications (lightning)
- Access Visualforce applications (visualforce)

**Require Proof Key for Code Exchange (PKCE)**  
Extension for Supported Authorization Flows

Require Secret for Web Server Flow: ☒

Require Secret for Refresh Token Flow: ☒

Enable Client Credentials Flow: ☐

Enable Authorization Code and Credentials Flow: ☐

Issue JSON Web Token (JWT)-based access tokens for named users: ☐

Intrinspect All Tokens: ☐

Configure ID Tokens:

Enable Asset Tokens:

Enable Single Logout:

Click **Save** when done.

## New Connected App

Changes can take up to 10 minutes to take effect. Deleting a parent org also deletes all connected apps with OAuth settings enabled.

[Continue](#) [Cancel](#)

**Important:** Wait 10-20 minutes after creating the connected app for the changes to be fully applied.

Go to **Setup > Apps > App Manager > Your created App > View > Manage Consumer Details** and collect the **Consumer Key** and **Consumer Secret** from the connected app.

Connected App Name

## Exalate

[« Back to Manage Connected Apps](#)

### Consumer Details

Consumer Key 3MVG9pRzvMkjMb6lr8ob0wDiwI7BQfOhANZEWprL\_z0b2wiBACWuAH1SQmxjsSy00jc1ubsmuAsjuRjkzdfC2  
[Copy](#)

Consumer Secret FCDFA74AE26391207F3EB45B97CC72BAA618C190805D167100B19A4F0CFAD7CD  
[Copy](#)

### Staged Consumer Details

Generate staged values for the consumer key and secret. When you apply the staged values, they replace the original consumer details.

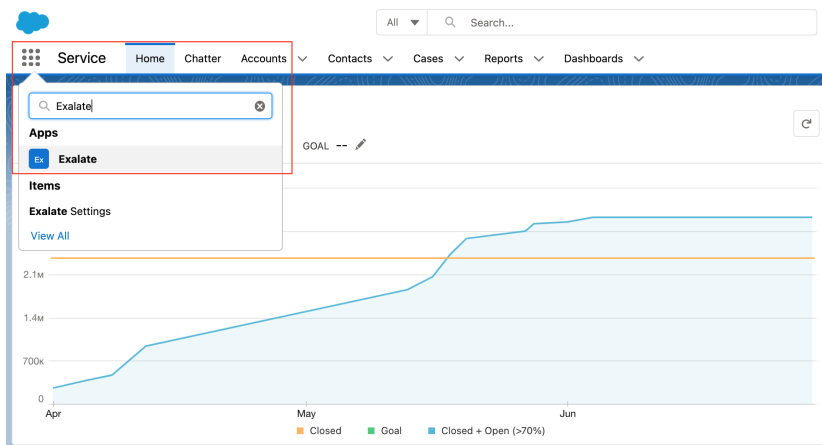
Staged Consumer Key Not generated  
Staged Consumer Secret Not generated

[Generate](#) [Apply](#) [Cancel](#)

## 12. Request an Exalate node

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

- Access the Exalate app from the search bar



- Copy the **Consumer Key** and **Secret** from the connected app and paste here, then click on **Request Node**.

The screenshot shows the 'Exalate Console' form. It has a message: 'We are preparing to create a node in the background, please wait.' Below this message are two input fields: 'Consumer Key' and 'Consumer Secret'. At the bottom of the form is a blue button labeled 'Request Node'.

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

- Access Analytics REST API Charts Geodata resources
- 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?)

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.

The screenshot shows the Exalate Console interface. At the top, there's a navigation bar with the Exalate logo and a search bar. Below the navigation bar, the main content area is titled "Exalate Console" and features a "Registration" form. The form includes fields for Email (user@example.com), Contact name (User), Organization (Exalate), and Phone (12-123-1234). Below the form, there's a checkbox for "By clicking Agree and submit below, you agree to our End User License Agreement" and links for "More Integrations", "Documentation", "EULA", "Support", and "Report a bug". The footer indicates the version is "Powered by Exalate v. 5.5.5 (Core v. 5.5.5)".

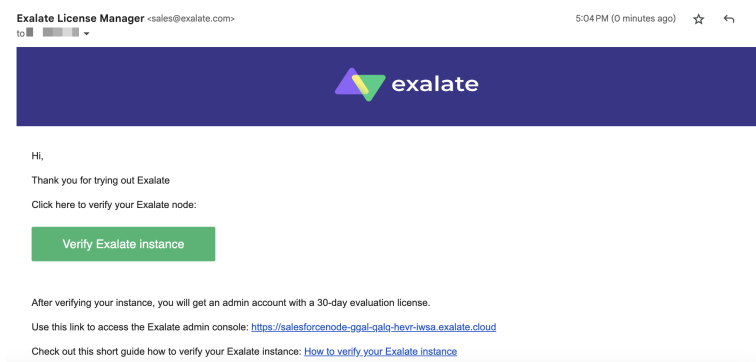
2. Click **Agree and submit**, to agree to the [EULA](#) and continue.

**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**



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

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