

Install Exalate for Salesforce

Last Modified on 07/21/2023 12:03 pm EDT

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, and Winter 23 releases.



Exalate

Exalate Console



Exalate Console

We are preparing to create a node in the background, please wait.

Consumer Key

Consumer Secret

Request Node

Introduction

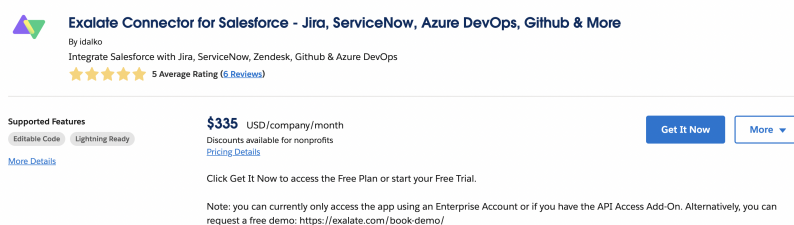
You can

- 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 a new Exalate Bridge App version created as a workaround for the installation problem on Salesforce](#)

Install Exalate on Salesforce from the AppExchange

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**



Exalate Connector for Salesforce - Jira, ServiceNow, Azure DevOps, Github & More
 By idalko
 Integrate Salesforce with Jira, ServiceNow, Zendesk, Github & Azure DevOps
 ★★★★★ 5 Average Rating (6 Reviews)

Supported Features
 Editable Code | Lightning Ready

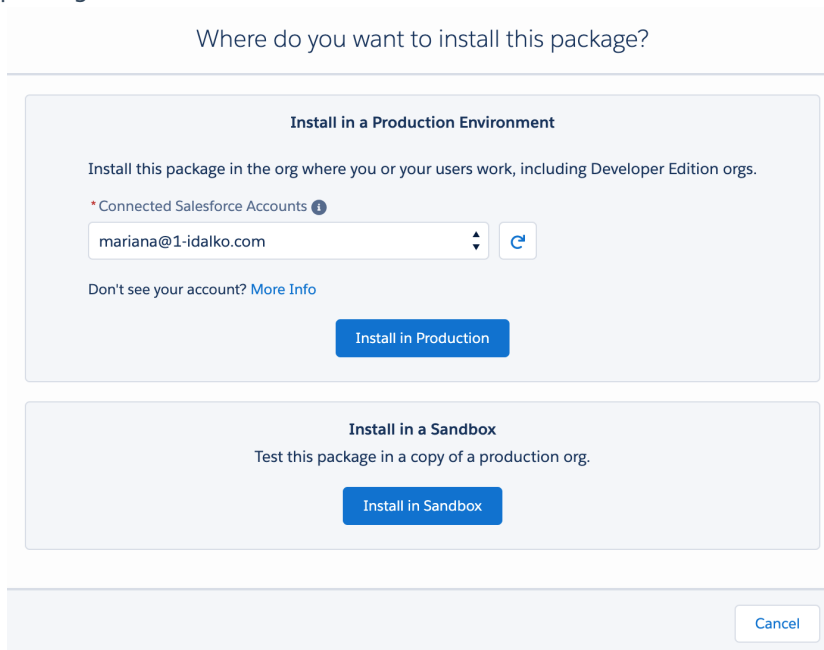
\$335 USD/company/month
 Discounts available for nonprofits
[Pricing Details](#)

[Get It Now](#) [More](#)

Click Get It Now to access the Free Plan or start your Free Trial.

Note: you can currently only access the app using an Enterprise Account or if you have the API Access Add-On. Alternatively, you can request a free demo: <https://exalate.com/book-demo/>

3. Select **Production** or **Sandbox** environment depending on where you want to install the package



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 ⓘ

mariana@1-idalko.com

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

[Install in Production](#)

Install in a Sandbox

Test this package in a copy of a production org.

[Install in Sandbox](#)

[Cancel](#)

4. Confirm installation details

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

Confirm Installation Details

i Review the [customization guide](#) for installation and configuration steps.

Package ExalateBridgeApp (1.1.0 / 1.1.0)	Version 1.1.0 / 1.1.0
Subscription Free	Organization Idalko
Duration Does Not Expire	Number of Subscribers Site-wide
Username mariana@1-idalko.com	

Here are the details we'll share from your profile [Edit Profile](#)


* First Name	mariana	* Company	idalko
* Last Name	kolomiets	* Country	Ukraine
Job Title	tech writer	State/Province	
* Email	mariana@idalko.com		
Phone			

I have read and agree to the terms and conditions.

Cancel
Confirm and Install

5. Log in to your Salesforce account

You will be automatically redirected to the salesforce login screen once you confirm the installation



Username

Password

Log In

Remember me

[Forgot Your Password?](#)
[Use Custom Domain](#)

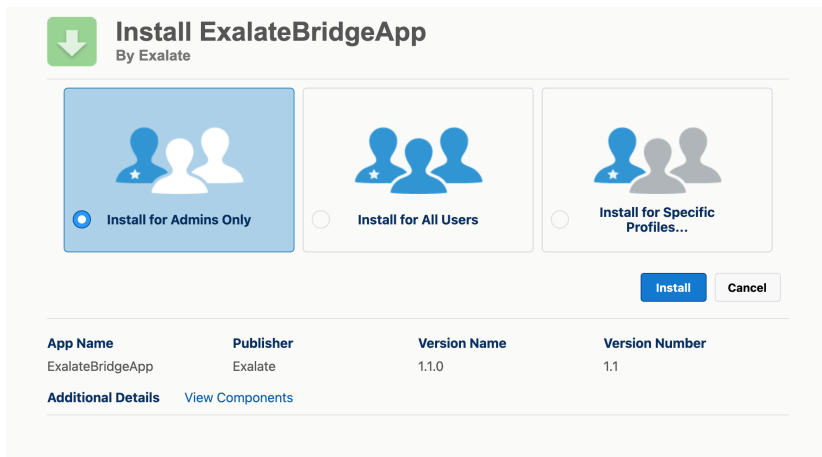
Not a customer? Try for Free

6. Select a group of users that will have permission to use the Exalate app

If you install Exalate for **Admins Only**, only the administrators will 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** will grant permission to use the app to all registered users.

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

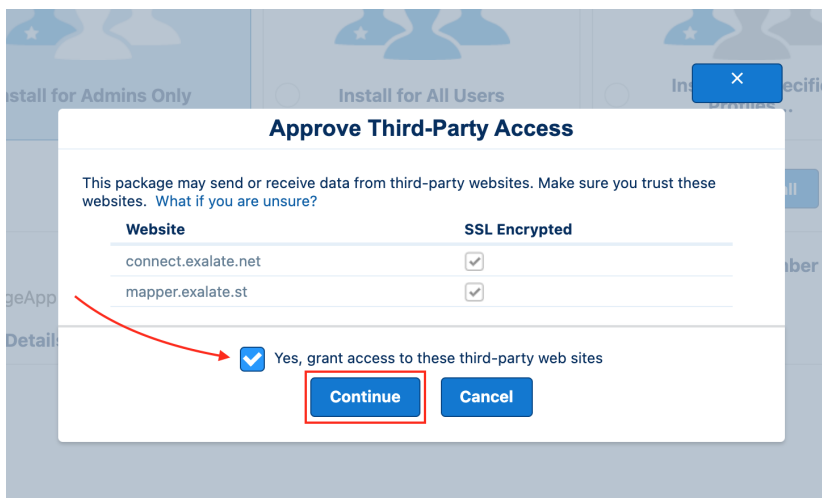


7. Click **Install**

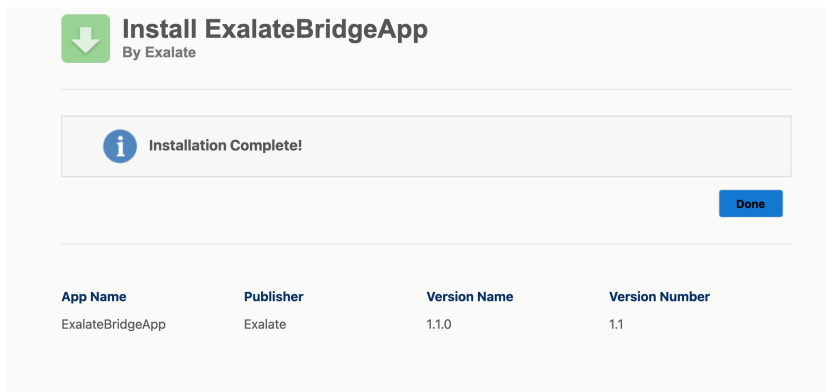
8. Approve third-party access

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

Note: mapper.exalate.st is not exchanging requests with your Exalate node. It has been added for development purposes only.

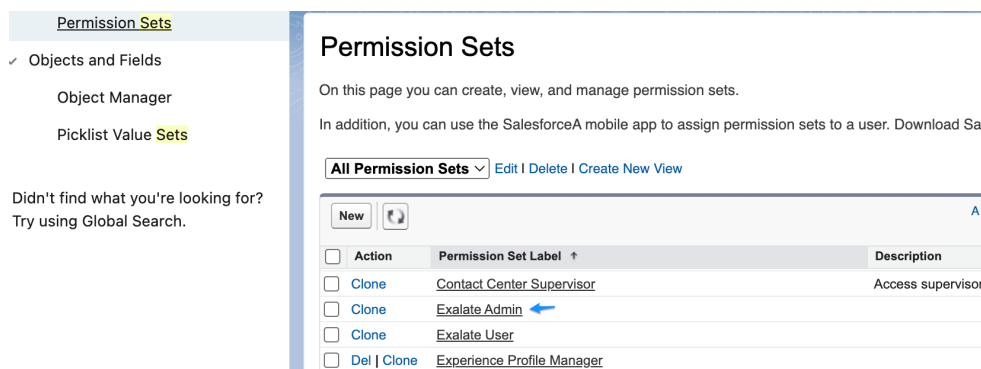


9. Installation complete. Click **Done** to go back to your Salesforce instance



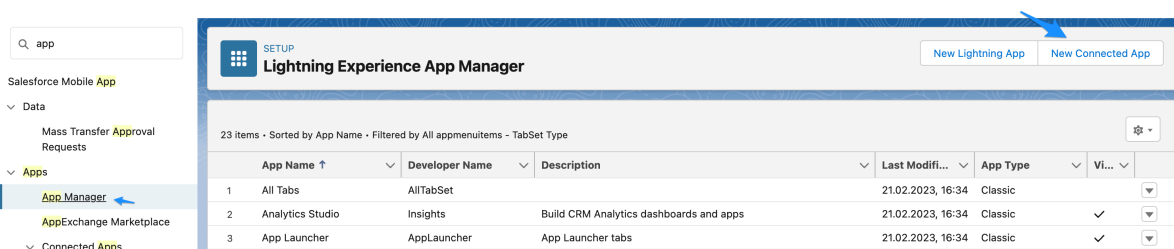
How to create a connected app

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



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**.

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



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

SETUP App Manager

Connected App Name: Exalate

API Name: Exalate

Contact Email: dev@exalate.com

Contact Phone: [Empty]

Logo Image URL: [Empty]
Upload logo image or Choose one of our sample logos

Icon URL: [Empty]
Choose one of our sample logos

Info URL: [Empty]

Description: [Empty]

API (Enable OAuth Settings)

Enable OAuth Settings:

Enable for Device Flow:

Callback URL: https://connect.exalate.net/rest/oauth/callback

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 (wave_api)
- Access Connect REST API resources (chatter_api)
- Access Headless Forgot Password API (forgot_password)
- Access Headless Registration API (user_registration_api)
- Access Interaction API resources (interaction_api)
- Access Lightning applications (lightning)
- Access Visualforce applications (visualforce)
- Access all Data Cloud API resources (cdp_api)
- Access chatbot services (chatbot_api)

Require Secret for Web Server Flow:

Require Secret for Refresh Token Flow:

Enable Client Credentials Flow:

Click **Save** when done.

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

Connected App Name
Exalate_new

[« Back to List: Custom Apps](#)



[Edit](#) [Delete](#) [Manage](#)

Version	1.0
API Name	Exalate_new
Created Date	19.07.2023, 14:31
	By: QA QA
Contact Email	lidiya.zhhuta+dev@idalko.com
Contact Phone	
Last Modified Date	19.07.2023, 14:31
	By: QA QA
Description	
Info URL	

API (Enable OAuth Settings)

Consumer Key and Secret

[Manage Consumer Details](#)

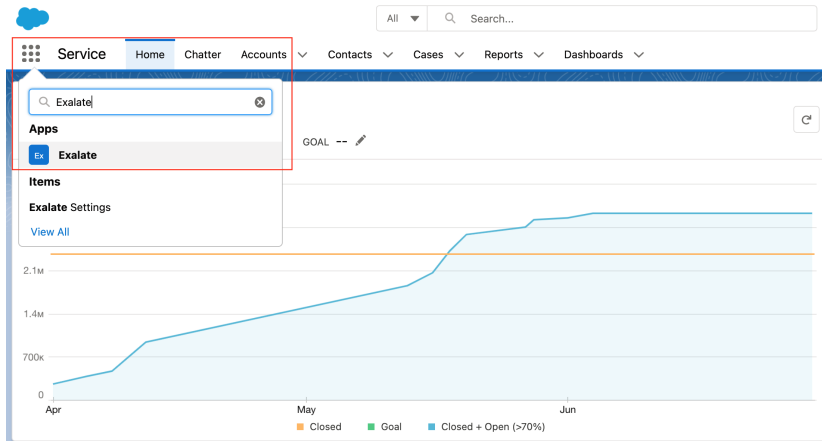
Selected OAuth Scopes

Access the identity URL service (id, profile, email, address, phone)
 Manage user data via APIs (api)
 Manage user data via Web browsers (web)
 Full access (full)
 Access Connect REST API resources (chatter_api)
 Access Visualforce applications (visualforce)
 Perform requests at any time (refresh_token, offline_access)
 Access unique user identifiers (openid)
 Access custom permissions (custom_permissions)
 Access Analytics REST API resources (wave_api)
 Access Analytics REST API Charts Geodata resources (eclair_api)

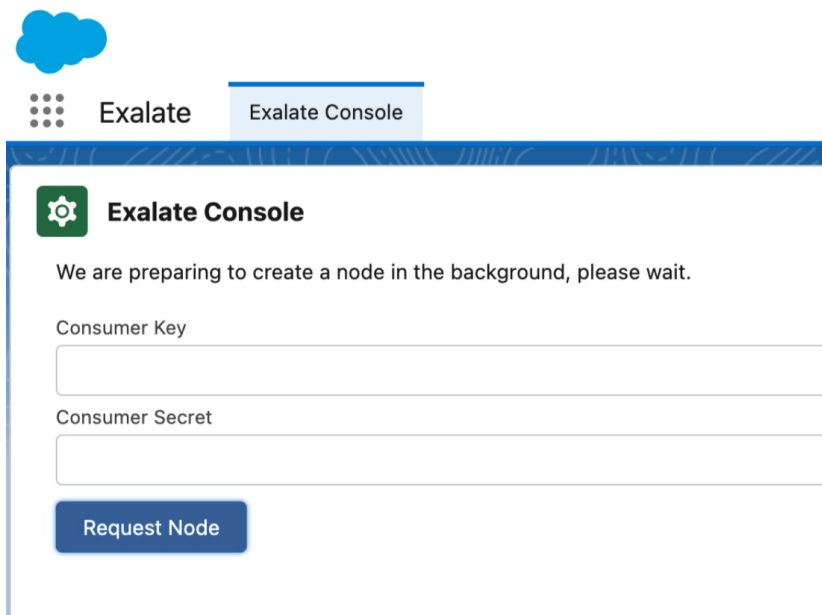
10. Request an Exalate node

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

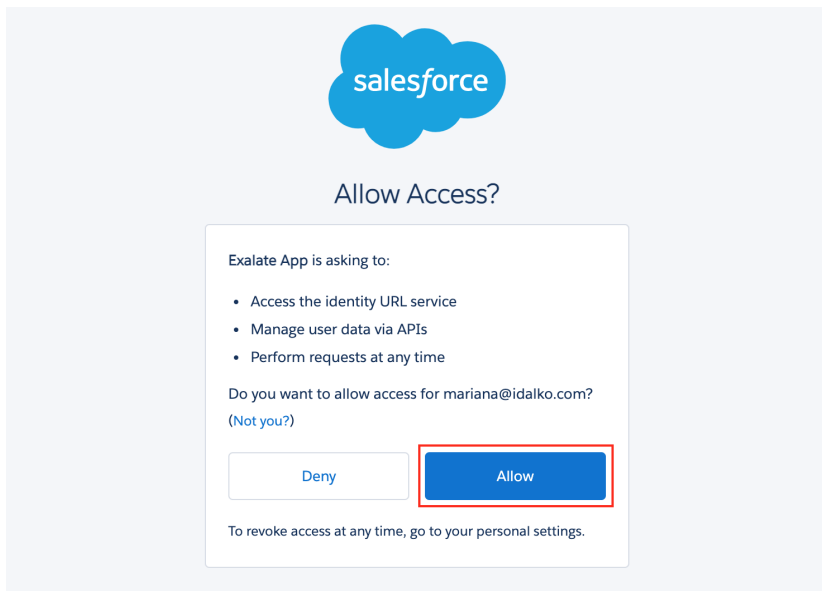
- Access the Exalate app from the search bar



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



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



After you allow the permissions you will be redirected back to the Salesforce interface.

11. 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 will send you a verification email. With this info Exalate will:

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

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

Note: 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>

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**



Hi,

Thank you for trying out Exalate

Click here to verify your Exalate node:



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://exalate.tracker.net>

Check out this short guide how to verify your Exalate instance: [How to verify your Exalate instance](#)

If you have any questions - please [raise a ticket on our service portal](#).

Enjoy,
The Exalate team

If you received this message by accident, you can ignore this message, or [contact our support](#)

4. Click **Continue**

Congratulations! The registration process has been completed.

How to a Generate Security Token for Salesforce?

Check out this guide on [how to generate a security token for Salesforce](#).

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.

Check out [Docker documentation](#) for details on how to install Docker.

1. How to install Exalate for Salesforce on Docker?
 1. Create or download the docker-compose.yml
 2. Ensure that a correct database is setup using a createdb.sh
 3. Set environment variables if necessary

4. Register the node
 5. Start the application
2. Troubleshooting

Check out the [how to host Exalate for Salesforce on your own server detailed guide](#).

Video Tutorial

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