

# Install Exalate for Salesforce

Last Modified on 07/15/2024 11:01 am 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, Winter 24, Spring 24, and Summer 24 releases.

## 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

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**

**AppExchange** Home Solutions by Type Product Collections Industry Collections Consultants Learn Latest Collections

Search AppExchange

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

**Business Need**  
 Integration

**Requires**  
 Service Cloud

**Compatible With**  
 Service Cloud

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

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/>

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

[More Details](#)

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

APP STORE Search AppExchange

Exalate Connector for Salesforce - Jira, ServiceNow, Azure DevOps, Github & More by Exalate

Where do you want to install Exalate Connector for Salesforce - Jira, ServiceNow, Azure DevOps, Github & More?

Before you install in a production org, we recommend testing in a sandbox first.

**!** Salesforce.com Inc. is not the provider of this listing and has not conducted any review of it. Please [click here](#) to understand what this means with respect to security and trust.

**Install in This Org**  
 Get going in the org where you're logged in right now.  
[Install Here](#)

**Install in a Sandbox Org**

4. Confirm installation details

- 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 Exalate Bridge App v2	Version ver 0.5 / 0.5.0
Subscription Free	Organization Exhale BV
Duration Does Not Expire	Number of Subscribers site-wide
User Name jose@exalate.sandbox	

**Tell us about yourself**

\* First Name

\* last name

Job Title

\* Company

\* Email

Phone

\* Country

\* State


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

## 5. Log in to your Salesforce account

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



Username

Password

Remember me

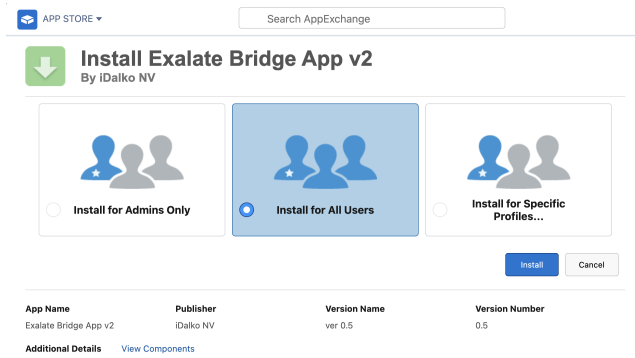
[Forgot Your Password?](#)

## 6. 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](#).

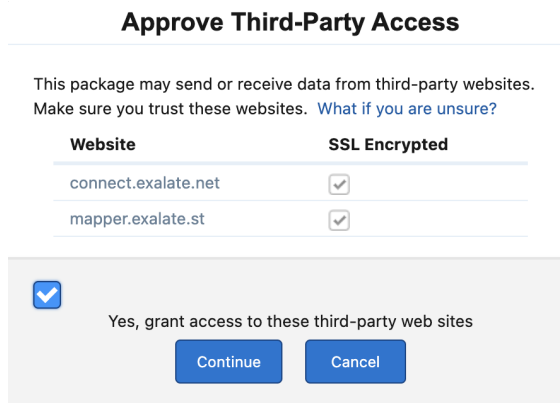
Installing Exalate for **All Users** grant permission to use the app to all registered users.

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.



7. Click **Install**

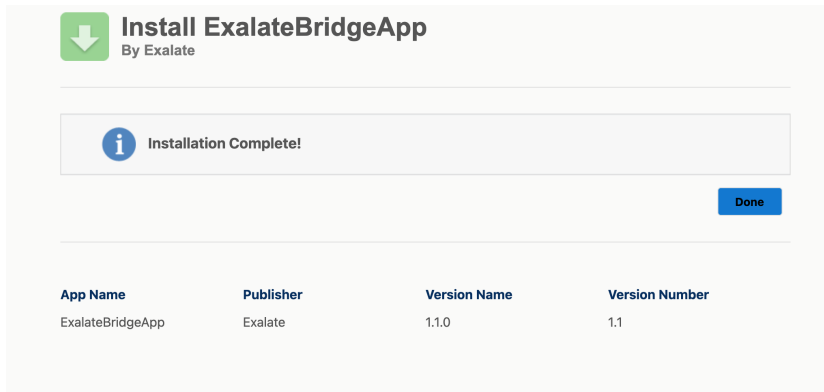
8. Approve third-party access



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

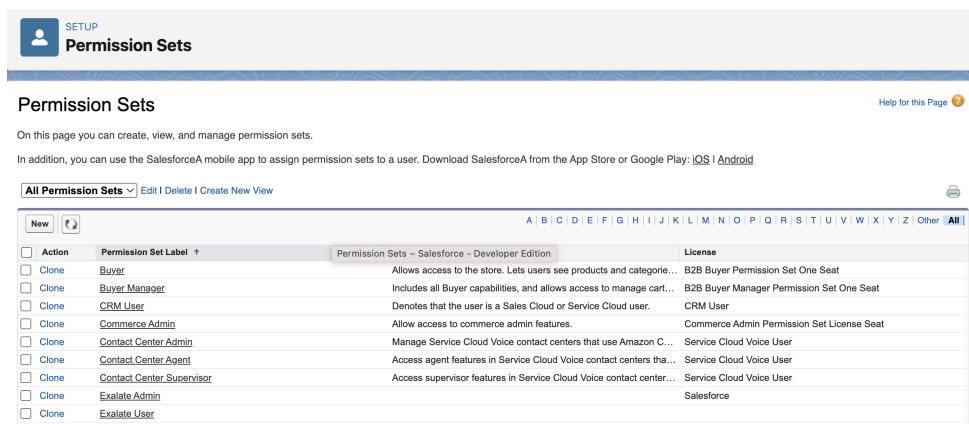
**Note:** mapper.exalate.st is not exchanging requests with your Exalate node. It has been added for development purposes only.

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



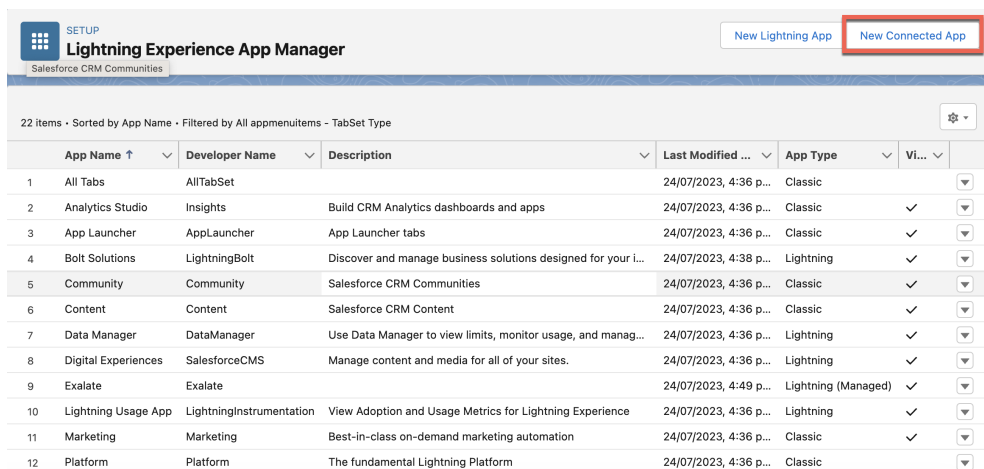
## How to create a connected app

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

**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 organisation, please [contact support](#) for help with the additional steps required. This issue is being addressed and is resolved in an upcoming release.

The screenshot shows the 'New Connected App' configuration page in App Manager. The 'Basic Information' section includes fields for Connected App Name, API Name, Contact Email, Contact Phone, Logo Image URL, Icon URL, Info URL, and Description. The 'API (Enable OAuth Settings)' section is expanded, showing 'Enable OAuth Settings' checked, 'Enable for Device Flow' checked, and 'Callback URL' set to 'https://connect.exalate.net/rest/oauth/callback'. A list of 'Available OAuth Scopes' is displayed, with a red box highlighting the 'Require Proof Key for Code Exchange (PKCE)' option, which is currently unchecked. Other options like 'Require Secret for Refresh Token Flow' are checked.

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

[« 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.

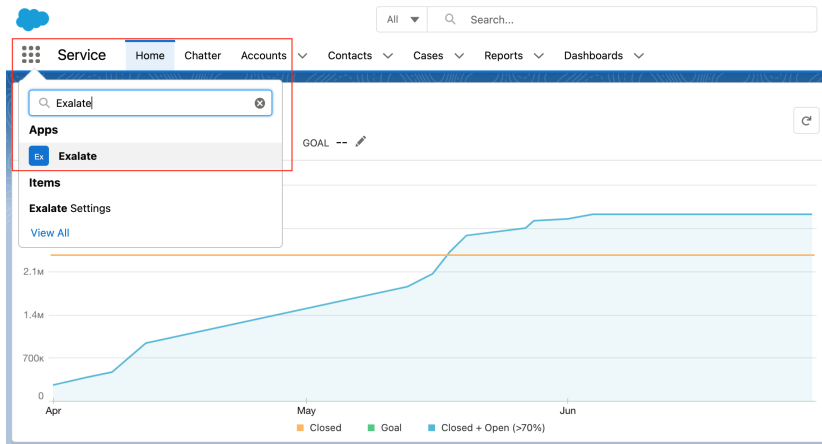
Staged Consumer Key Not generated  
Staged Consumer Secret Not generated

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

## 11. 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 interface. The page title is 'Exalate Console'. The main content area says 'We are preparing to create a node in the background, please wait.' Below this, there are two input fields for 'Consumer Key' and 'Consumer Secret'. At the bottom, there 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 be redirected back to the Salesforce interface.

## 12. 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 registration page. The left sidebar contains the Exalate logo and navigation options like 'Registration'. The main content area is titled 'Registration' and contains the following form fields:

- Email**: user@example.com
- Contact name**: User
- Organization**: Exalate
- Phone**: 12-123-1234

Below the form, there is a checkbox for 'Agree and submit' and a link to the 'End User License Agreement'. At the bottom, there are links for 'More Integrations', 'Documentation', 'EULA', 'Support', and 'Report a bug', along with the text 'Powered by Exalate v. 5.5.5 (Core v. 5.5.5)'.

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

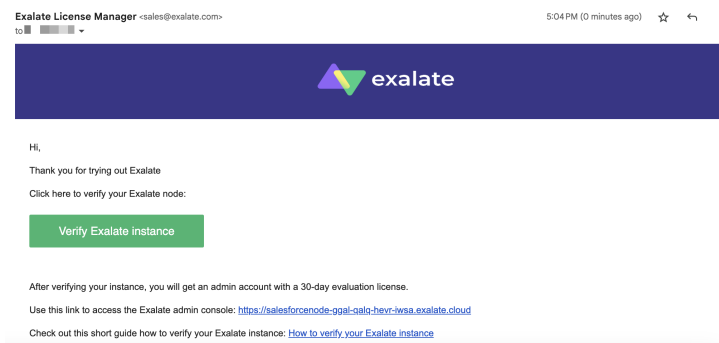
**Note:** After clicking **Agree and submit**, you accept our End User License Agreement (EULA). You can read it here: <https://static.idalko.com/legal/eula-addons.pdf>



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**



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 setup 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

## ON THIS PAGE

### Product

[Supported Salesforce Editions](#)

[About Us](#)

[Release History](#)

[Introduction](#)

[Glossary](#)

[Install Exalate on Salesforce from the AppExchange](#)

[API Reference](#)

[Security](#)

[Tutorial](#)

[Pricing and Licensing](#)

[Resources](#)

[Subscribe for a weekly Exalate hack](#)

[Academy](#)

[Blog](#)

[YouTube Channel](#)

[Ebooks](#)

[Still need help?](#)

[Join our Community](#)

[Visit our Service Desk](#)

[Find a Partner](#)