Install Exalate for Salesforce

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.
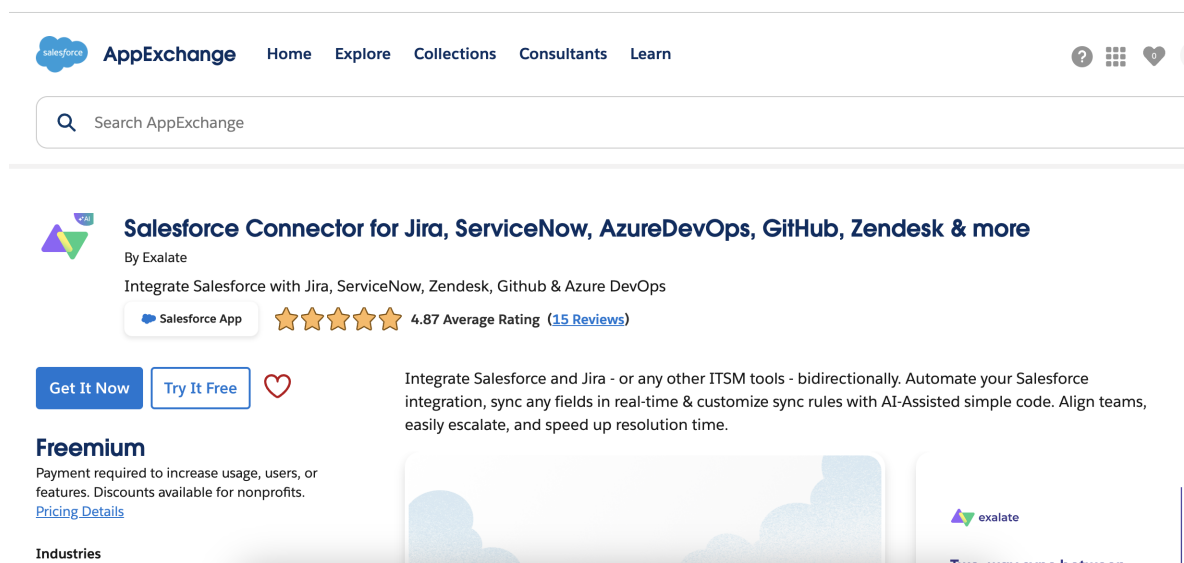- Install Exalate on Salesforce on Docker.

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

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

AppExchange

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

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

Website
https://
Email
suppor
Phone
+32 3 3

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

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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 ⓘ

[_____] ⇳ ↻

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**
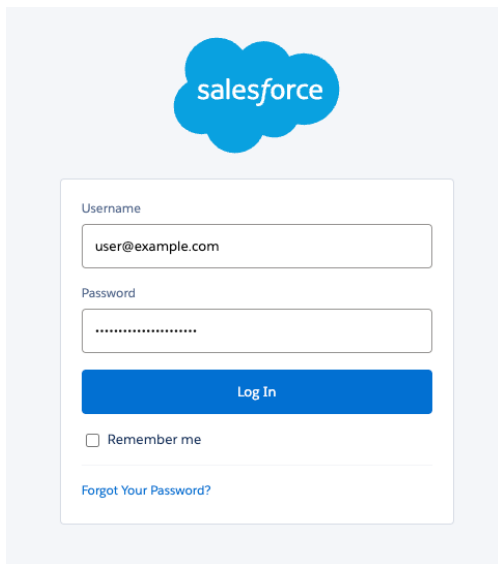
4. Log in to your Salesforce accoun t

You are automatically redirected to the Salesforce login screen once you confirm the installation
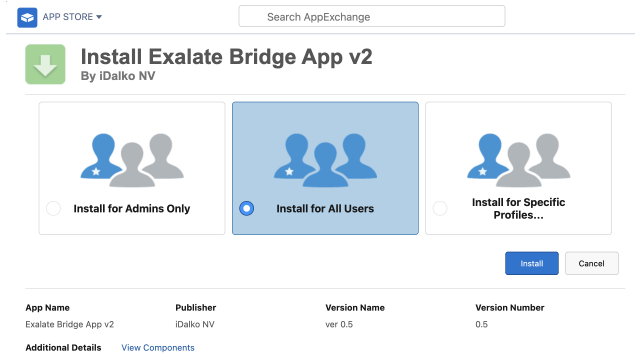
5. Select a group of users that has permission to use the Exalate app

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	☑

☑ 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

Install ExalateBridgeApp
By Exalate

ℹ **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**.

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**.

Select the "Create a Connected App" option:

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.

Click **Save** when done.

Go to **Setup > Apps> App Manager > Your created App > View > Manage Consumer Details** and **c**ollect 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.

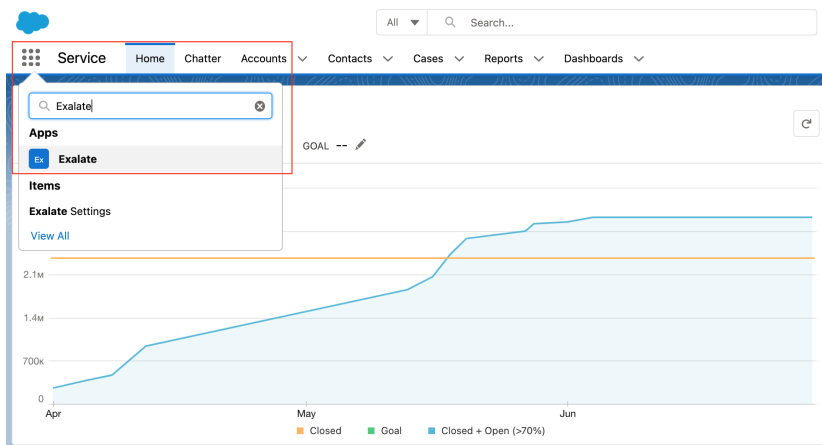|	
Staged Consumer Key	Not generated
Staged Consumer Secret	Not generated

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**.

- 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?)

| 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.

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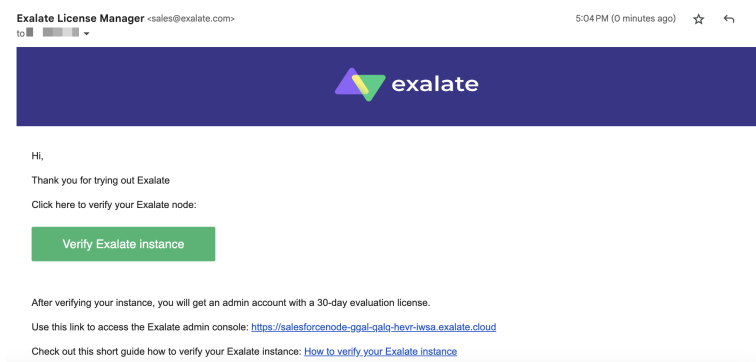
4. Once you receive the email and verify the registration of the node, you are redirected to the Exalate **console admin > Connections** screen.

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