

Set up a Connection in Basic Mode for Zendesk

Last Modified on 03/18/2024 10:06 am EDT

Note: Before you set up a Connection in Basic mode ensure that you don't use an older version of Exalate.

Connections in Basic mode have a set of **Sync Rules**, generated by Exalate.

With these connections, you can sync certain ticket types: questions, incidents, problems, and tasks. Ticket types are mirrored: questions are synced as questions, incidents as incidents, and so on.

Exalate syncs a basic set of ticket fields: summary, description, comments, and attachments.

If the entity types don't match on the destination instance, Exalate syncs an entity type based on the default entity type set in the destination instance.

All public and internal comments are synced as public.

Note: You cannot modify **Sync Rules** in Basic Mode.

If you want to edit/delete Sync Rules, you can upgrade the connection to Visual Mode or Script Mode.

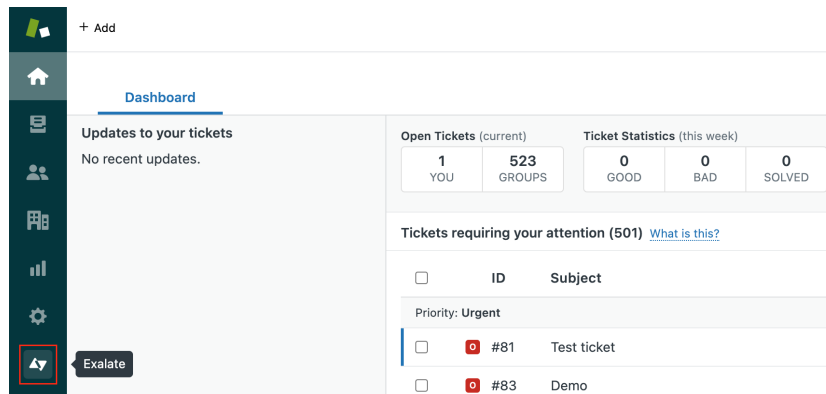
Initiate a Connection in Basic Mode from Zendesk

Note: It doesn't matter which side you start initiating the Connection from. The Exalate UI remains the same.

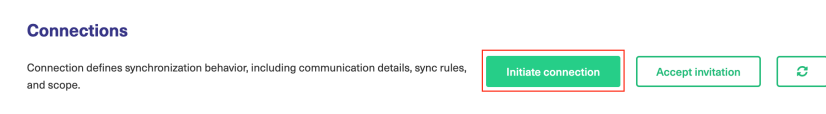
1. Navigate to the **Connections** tab in the Exalate console.

To navigate to the **Connections** tab:

Click the **Exalate** icon in the list of apps.



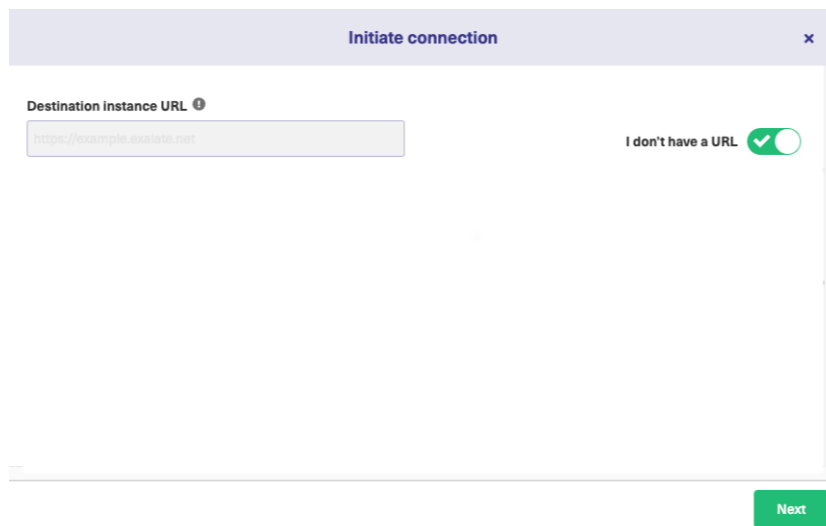
2. Click **Connections** → **Initiate connection**.



3. Enter the **Destination Instance URL**.

The **Destination Instance URL** is the link to the instance you want to set up a connection with. You can directly enter the link of that instance or the **Exalate URL** from the **General Settings** tab in the Exalate admin panel.

Note: If you enter the URL of your own instance here, Exalate determines it's a local connection between 2 projects within your instance.



Exalate suggests available Configuration Modes based on the destination instance.

4. Select **Basic**.

5. Click **Next**.


6. Confirm if you have admin access to the destination instance.

Further steps are different if you have or don't have admin access to the destination instance.


- Select **Yes, I have admin access** if you have admin access to the destination instance. You are redirected to the destination instance to establish a connection.
- Select **No, I don't have admin access** if you don't have admin access to the destination instance. You generate an invitation for the destination instance admin so they could establish a connection on their end.

Initiate connection x

Do you have admin access to the destination instance?

 **Yes, I have admin access**

- You will be redirected to the destination instance to establish the connection

 **No, I don't have admin access**

- You will generate an invitation and send it to the destination instance admin to establish the connection

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Steps for: Yes, I have Admin Access

Click **Yes, I have admin access & Initiate** the connection.

Note: You will be required to verify access on the destination instance. After that, complete the following steps on the destination instance.

7. Select the project or repository where you want to sync entities.

Note: Selecting the project or repository is not applicable to all platforms. In this case, the Connection is established after the previous step.

Accept invitation✕

Select a project for the incoming sync

After accepting an invitation for a Basic mode connection, Exalate will be able to sync basic issue fields. The sync rules cannot be updated. Exalate will sync the following issue data: summary, description, comments, and attachments.

Issue types are mirrored. This means that tasks will be synced as tasks, bugs as bugs, and improvements as improvements. If an issue type is not included in the basic set, it will be synced as a task.

Please select the project where you want to create entities, received from the other side.*

▾

[< Previous](#)Confirm

8. Click **Confirm**.

The Connection has been set up.

Exalate✕

Connection established successfully ✓

Sync your first issue to see how it works.

Please enter an issue key from the project **Test (TEST)** to proceed

Exalate

Steps for: No, I don't have Admin Access

Click **No, I have admin access & Initiate** the connection.

7. Click **Copy invitation code**.

You can send the invitation code to the destination instance admin.

Accept invitation x

Select a project for the incoming sync

After accepting an invitation for a Basic mode connection, Exalate will be able to sync basic issue fields. The sync rules cannot be updated. Exalate will sync the following issue data: summary, description, comments, and attachments.

Issue types are mirrored. This means that tasks will be synced as tasks, bugs as bugs, and improvements as improvements. If an issue type is not included in the basic set, it will be synced as a task.

Please select the project where you want to create entities, received from the other side.*

v

[< Previous](#) Confirm

14. Click **Confirm**.

The Connection has been set up.

Exalate x

Connection established successfully ✓

Sync your first issue to see how it works.

Please enter an issue key from the project **Test (TEST)** to proceed

Exalate

Start Synchronizing

You can sync your first entity in Exalate to see how it works: enter the entity URN on the previous screen and click **Exalate**.

Connection established successfully ✓

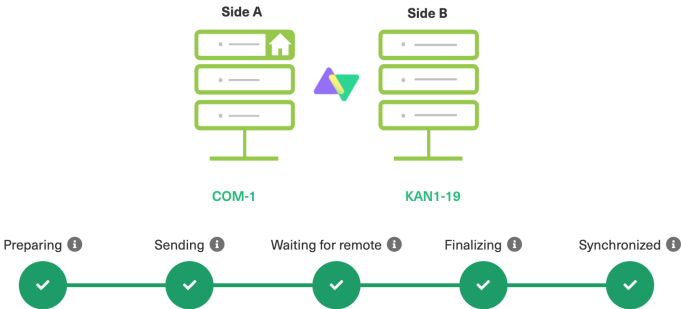
Sync your first issue to see how it works.

Please enter an issue key from the project **Company (COM)** to proceed

Exalate

When syncing your first entity, you see the status of your sync. The links to both entities are displayed at the bottom as shown below. You can open them up to see more details.

Congratulations!



What's Next?

Next, you can choose to

- sit back and relax while the sync works!
- [Manually](#) synchronize entities.
- [Connect an](#) entity.
- [Sync entities in bulk](#).
- Create a [trigger](#).

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