

Set Up a Connection in Visual Mode for Zendesk

Last Modified on 03/11/2024 9:07 am EDT

Important: You cannot toggle between the different modes. To do so, you need to create a new Connection in Visual mode, Script mode, or Basic mode.

Note: Before you set up a Connection in Visual mode ensure that:

- your instance is public.
- you have admin access to the destination instance.
- you are either in the Evaluation (trial) period or have a Paid license.

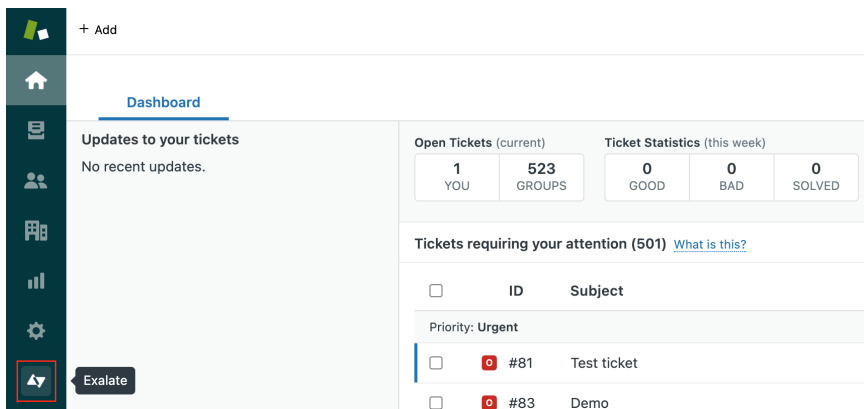
Initiate a Connection in Visual Mode from Zendesk

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.

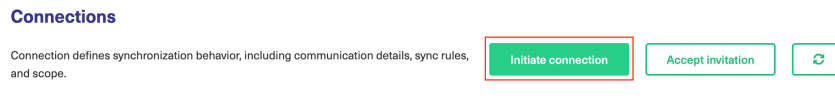
To navigate to the **Connections** tab:

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



2. Click **Connections**.

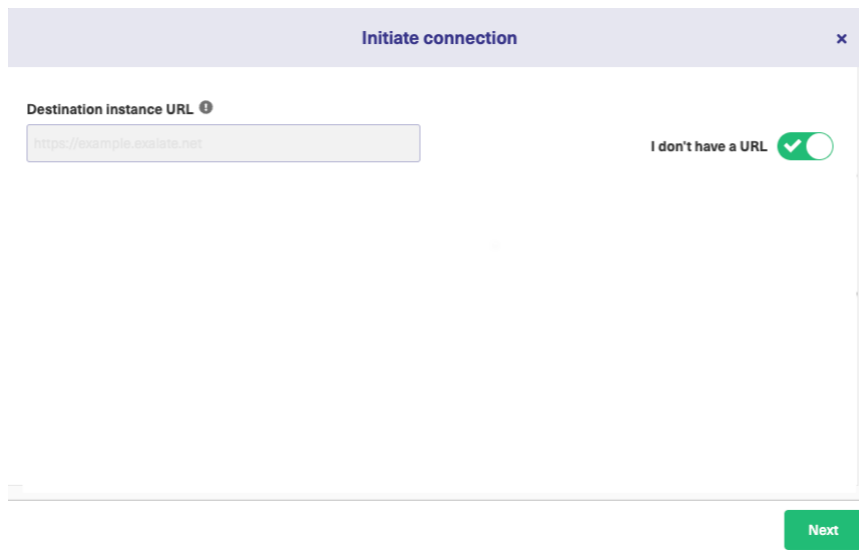
2. Click **Initiate Connection**.



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 don't have the link, toggle **I don't have a URL**. In this case, you are only able to set up a Connection in Script mode.



Exalate suggests available Configuration Modes based on the destination instance..

4. Select the Configuration Mode. In this case, **Visual Mode**.

Note: We are exploring ways to enhance or replace Visual Mode with an AI-Configuration mode for a better user experience. Check the **Beta** label added to the Visual mode screens. Your feedback is crucial, [so let us know what you think](#).

Initiate connection
✕

Destination instance URL ⓘ

✓

I don't have a URL ✕

Choose the configuration type

Basic

- Automatic configuration of basic fields
- Sync rules cannot be edited
- Only Issues can be synced
- Recommended for use cases of basic complexity

BETA
Visual

- Low-code, visual interface
- Configure both sides of the connection using a single interface
- Recommended for use cases of basic to intermediate complexity

Script

- Groovy-based scripting
- Configure each side of the connection separately
- Recommended for use cases of basic to advanced complexity

Next

5. Click **Next**.

6. Enter the Connection Information

Field	Description
Local instance short name	A short name for your instance
Destination instance short name	A short name for the destination instance
Connection name	Name of the connection
Description	Description of the connection

Initiate connection
✕

Connection information

Local instance short name*

Remote instance short name*

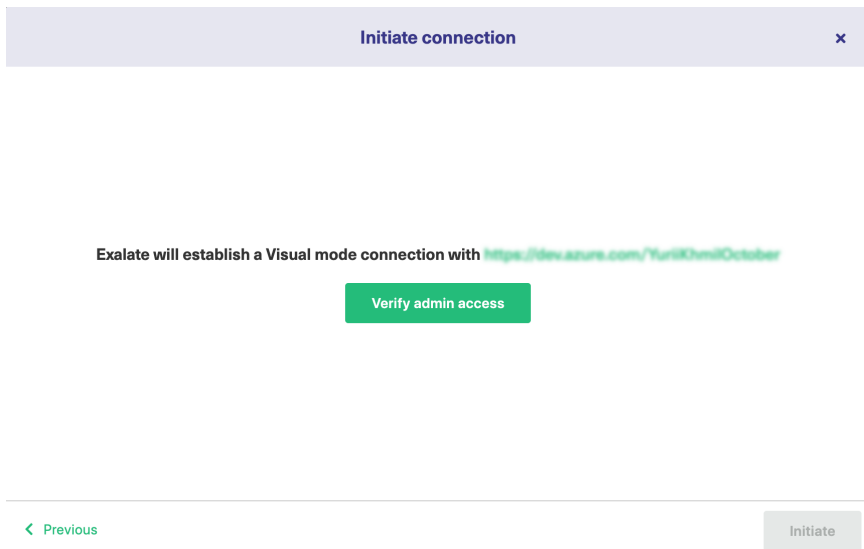
Connection name*

Description

← Previous
Next

7. Click **Next**.

8. Click **Verify admin access** to confirm you have admin rights to the destination instance. Then click **Initiate**.

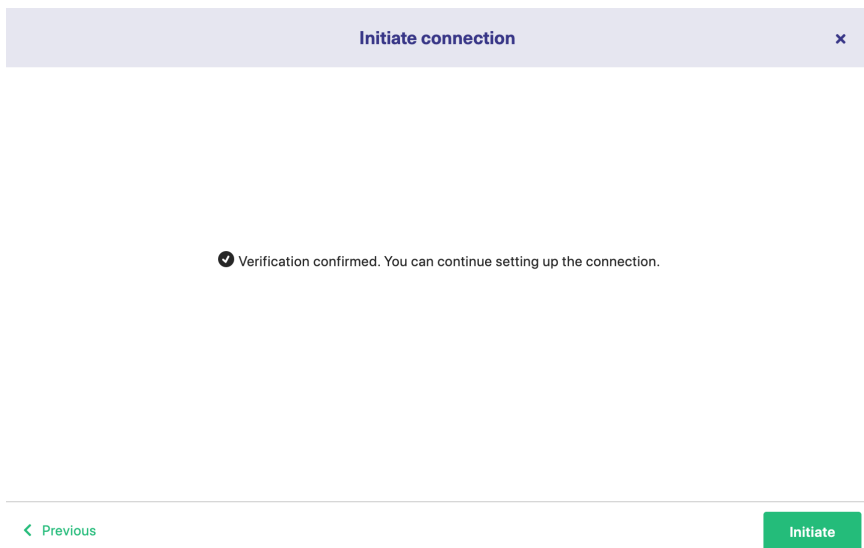


9. Click **Accept** to finish the verification process.

You see a pop-up window within the remote instance to finish the verification. You are also notified about the permissions that the destination instance user has.

The destination instance user has different permissions based on the platforms to be synced.

10. Click **Initiate**.



11. The Connection has been set up.

Initiate connection

x

Congratulations!



Connection is established.

Configure Sync

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