

# Set up a Connection in Basic Mode for Salesforce

Last Modified on 03/18/2024 10:22 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. In Basic connections, you can only sync **cases**.

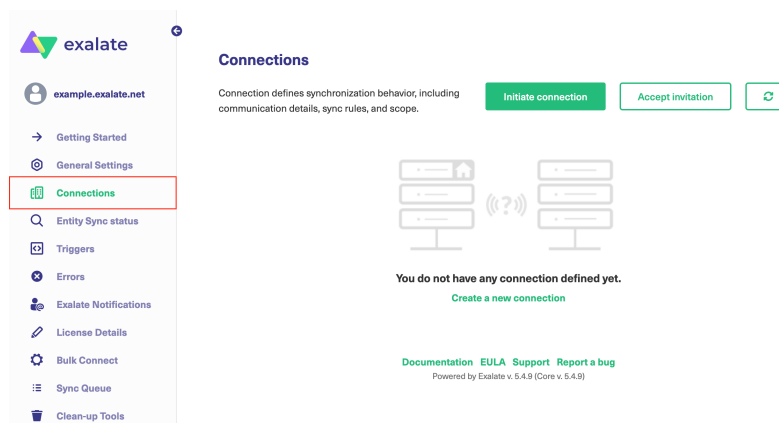
**Note:** You cannot modify **Sync Rules** in Basic Mode.

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 Salesforce

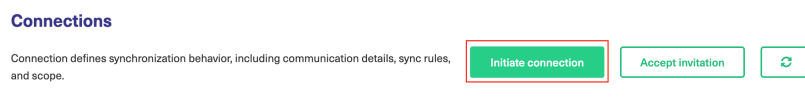
**Note:** It doesn't matter which side you start initiating the Connection from. The Exalate UI remains the same.

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



Click **Connections**.

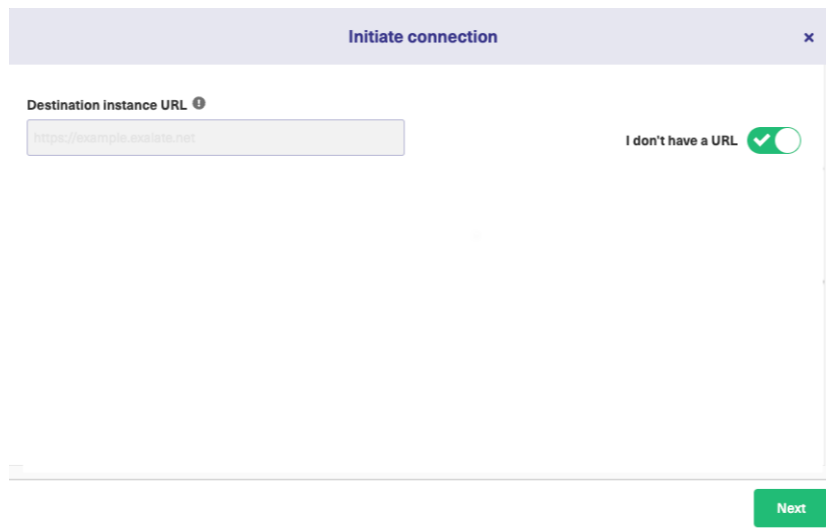
2. Click **Initiate connection**.



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.

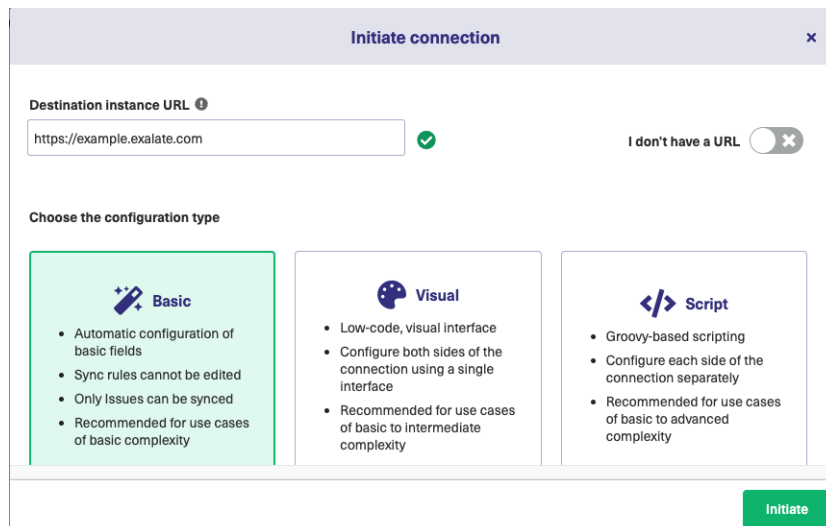
**Note: If you enter the URL of your own instance here, Exalate determines it's a local connection between 2 projects within your instance.**



The screenshot shows a dialog box titled "Initiate connection" with a close button (x) in the top right corner. Below the title bar, there is a label "Destination instance URL" with a help icon (i). A text input field contains the URL "https://example.exalate.net". To the right of the input field is a toggle switch labeled "I don't have a URL" which is currently turned on (green). At the bottom right of the dialog, there is a green button labeled "Next".

Exalate suggests available Configuration Modes based on the destination instance.

4. Select **Basic**.



The screenshot shows the same "Initiate connection" dialog box. The "Destination instance URL" field now contains "https://example.exalate.com" and has a green checkmark to its right. The "I don't have a URL" toggle is now turned off (grey). Below this, there is a section titled "Choose the configuration type" with three options: "Basic" (highlighted with a green border and a pencil icon), "Visual" (with a palette icon), and "Script" (with a code icon). Each option has a list of bullet points describing its features. At the bottom right, there is a green button labeled "Initiate".

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** 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.\***

Select Project | v

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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

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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.

Initiate connection ×

On the "company B" side, you (or their application administrator) need to **Accept the Invitation**.

Use the following invitation code:

[Copy invitation code](#)

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Done

8. Click **Done**.

**Note:** Complete the following steps on the destination instance:

9. Click on **Accept Invitation** under the **Connections** tab in the Exalate Admin Console in the destination instance and Paste the invitation code.

Accept Invitation ✕

**Please paste the invitation code, received from your partner**

**Enter the invitation code**

eyJpbnZpdGF0aW9uU2VjcmV0IjoieU2SnGckZHqZHGqZINrVGIQb1NKN3pablp0clV3MWUuILCJpbnZpdGVkSW5zdGFuY2VvaWQio  
 iJmMDYwYmE2Yy0xNTg5LTQxNDUyTk2MS03MGlzNWUyMjgzZjQlCjU2RiSW5mbyleyJyYm1ljoibmFib28iLCJjYXNlVXJsjoiaH  
 R0cHM6Iy9qY2xvdWRub2RlWxxZ2Ytb3Zzei14c250LXFicmEuZXhhbGF0ZS5jbG91ZCIsImZlc3VlVHJhY2t0ciZlcnNpb24iOii1LjMuMyIsIm1pbkh1Yk9ia  
 bmFib28uYXRsYXNzaWFlLm5ldCIsIm5vZGVUeXBlljoieU2SnGckZHqZHGqZINrVGIQb1NKN3pablp0clV3MWUuILCJpbnZpdGVkSW5zdGFuY2VvaWQio  
 cHBlWZkzaW9uIjoieU2SnGckZHqZHGqZINrVGIQb1NKN3pablp0clV3MWUuILCJpbnZpdGVkSW5zdGFuY2VvaWQioeU2SnGckZHqZHGqZINrVGIQb1NKN3pablp0clV3MWUuILCJpbnZpdGVkSW5zdGFuY2VvaWQio  
 mVjdHNWZkzaW9uIjoieU2SnGckZHqZHGqZINrVGIQb1NKN3pablp0clV3MWUuILCJpbnZpdGVkSW5zdGFuY2VvaWQioeU2SnGckZHqZHGqZINrVGIQb1NKN3pablp0clV3MWUuILCJpbnZpdGVkSW5zdGFuY2VvaWQio  
 XhSZXN0VmYyc2lvaW9uIjoieU2SnGckZHqZHGqZINrVGIQb1NKN3pablp0clV3MWUuILCJpbnZpdGVkSW5zdGFuY2VvaWQioeU2SnGckZHqZHGqZINrVGIQb1NKN3pablp0clV3MWUuILCJpbnZpdGVkSW5zdGFuY2VvaWQio  
 b24iOii1LjMuNCIsIm1uc3RhbmlNIVWlkiOid0ZWE2MWRiYTk2Mi00YjdiLW1NzUzZjE5MDRiOGU0ZDA3IiwiaWZWRpdG9yIjpw71mFkb  
 WluUHJvb2ZvcmxUZW1wbGF0ZSI6Imh0dHBzOi8vbmFib28uYXRsYXNzaWFlLm5ldCIsIm5vZGVUeXBlljoieU2SnGckZHqZHGqZINrVGIQb1NKN3pablp0clV3MWUuILCJpbnZpdGVkSW5zdGFuY2VvaWQio  
 NkMvX1MDAyaNmRlc3QtdXJsXHUwMDNkaHR0cHMIM0EIMkYIMkZuYWVjby5hdGxhc3NpYW4ubmV0JTJGeGx1Z2lyUyRnNlcn...

Next

10. Click **Next**.

11. Select the project where you want to sync issues.

**Note:** Selecting the project 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.\***

Select Project | ▾

< Previous
Confirm

12. Click **Confirm**.

The Connection has been set up.

**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** ✓

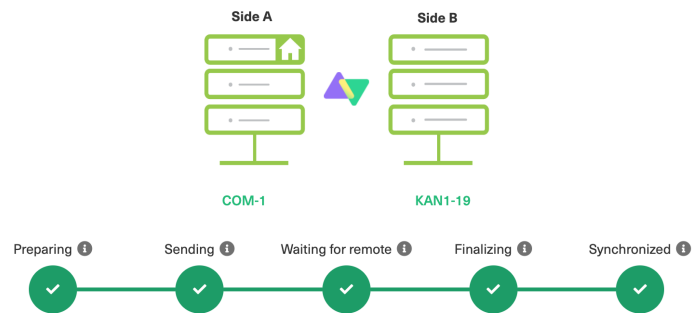
Sync your first issue to see how it works.

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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