How to upgrade a Basic connection?

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As it is not possible to update the Sync Rules in Basic Connections, you need to upgrade it to a Script or, if applicable, a Visual configuration mode.

How to Upgrade a Basic Connection to a Visual Configuration Mode

Note: You can upgrade a Basic connection to a Visual configuration mode for Jira Cloud, Jira On-premise, Azure DevOps, or Zendesk.

Note: Before upgrading a Basic connection to the Visual mode ensure that:

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

To upgrade a Basic connection to the Visual configuration mode:

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

4	exalate G	Connections
θ	example.exalate.net	Connection defines synchronization behavior, including Initiate connection Accept invitation
→	Getting Started	
0	General Settings	
00	Connections	
Q	Entity Sync status	
O	Triggers	
۵	Errors	You do not have any connection defined yet.
łe	Exalate Notifications	Create a new connection
0	License Details	
0	Bulk Connect	Documentation EULA Support Report a bug
:=	Sync Queue	Powered by Exalate v. 5.4.9 (Core v. 5.4.9)
Ť	Clean-up Tools	

2. Click the **Edit Connection** button.

Connection	Issues under sync	Last sync	Status	
Company A to Company B Description of the connection forem (psum sit amet	123	Issue TEST-777 46 minutes ago	Active	B S

3. Click the Upgrade button.

	Company A_to_company B ● Active Scope Rules Statistics Info		< Back to Connec	ctions 🗸	Publish	Upgrade				
	Scope	Rules	Statistics	Info						
	Define the cont Using Basic cor	ext for the synchronic for the synchronic for the synchronic formation and	onization: what issues y only sync issues .	you want to sync and	how to start the	synchronization proce	288.			
4. Select Visua	al mode.									
				Upgrade o	connectio	'n				×
4. Select Visual mode. Upgrade connection Upgrade the connection for more features Upgrade the connection for more features ↓ Script mode . Groovy-based scripting . Configure both sides of the connection using a single interface										
	Low-code, Configure I interface Recommer complexity	Vis visual interfac poth sides of t aded for use of	ual mode ce the connection us cases of basic to in	iing a single ntermediate	• Gr • Cc • Re co	oovy-based scrip onfigure each sid commended for mplexity	Scrip oting e of the c use case	t mode connection s as of basic to	separately o advanced	
	Visua	al mode req	uires admin ac	cess to the de	estination s	ide https://svi	tlana-bl	ue.exalate	.net	

5. Click the Verify admin access button.

bygrade the connection for more features Visual mode Low-code, visual interface Configure both sides of the connection using a single interface	Script mode Groovy-based scripting Configure each side of the connection separately Recommended for use cases of basis to advanced		
Visual mode requires admin access to the development of the devel	complexity estination side https://svitlana-blue.exalate.net min access		

Upgrade

You see a pop-up window within the remote instance. Click the **Accept** button to finish the verification process.

Note: Make sure your browser or any additional application is not blocking pop-ups.



6. Click the **Upgrade** button.

Once the verification is confirmed you can upgrade the connection.

 Visual mode Low-code, visual interface Configure both sides of the connection single interface Recommended for use cases of basic intermediate complexity 	 to Script mode Groovy-based scripting Configure each side of the connection separately Recommended for use cases of basic to advanced complexity
	Verification confirmed

Now that the connection has been upgraded to the Visual configuration mode, you can edit the sync rules.

How to Upgrade a Basic Connection to a Script Configuration Mode

Note: Before upgrading a Basic connection to the Script mode ensure that:

- you are either in the Evaluation (trial) period or have a Paid license.
- in case of a Private-to-Public connection, the upgrade is performed from the Private side.

To upgrade a Basic connection to Script:

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

4 0	exalate example.exalate.net	Connections Connection defines synchronization behavior, including communication details, sync rules, and scope. Connection Connecti
→	Getting Started	
٢	General Settings	
0	Connections	
Q	Entity Sync status	
O	Triggers	
8	Errors	You do not have any connection defined yet.
	Exalate Notifications	Create a new connection
0	License Details	
0	Bulk Connect	Documentation EULA Support Report a bug
:=	Sync Queue	Powered by Exalate v. 5.4.9 (Core v. 5.4.9)
Ť	Clean-up Tools	

2. Find the connection that you want to upgrade in the list of connections and click **Edit**

Connection.

Connection	Issues under sync	Last sync	Status	
Company A to Company B Description of the connection lovern josum sit arrest	123	Issue TEST-777 46 minutes ago	Active	e • ••

3. Click the **Upgrade** button.

»	Company A_to	_company B				< Back to Connections	~	Publish	Upgra	ıde
	Scope	Rules	Statistics	Info						
	Define the conte Using Basic con	ext for the synchr nection, you can	onization: what issue only sync issues .	s you want to syne	and how to start th	e synchronization process.				

4. Select Script mode.

Note: In case your platform doesn't support Visual mode configuration, you see the Script mode block only.

Upgrade connection						
Upgrade the connection for more features	[
Visual mode • Low-code, visual interface • Configure both sides of the connection using a single interface • Recommended for use cases of basic to intermediate complexity	 Script mode Groovy-based scripting Configure each side of the connection separately Recommended for use cases of basic to advanced complexity 					

Upgrade

5. Click the **Upgrade** button.





Now when the connection has been upgraded to the Script configuration mode, you can edit the sync rules.

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