

# How to upgrade a Basic connection?

Last Modified on 12/17/2024 8:44 am EST

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

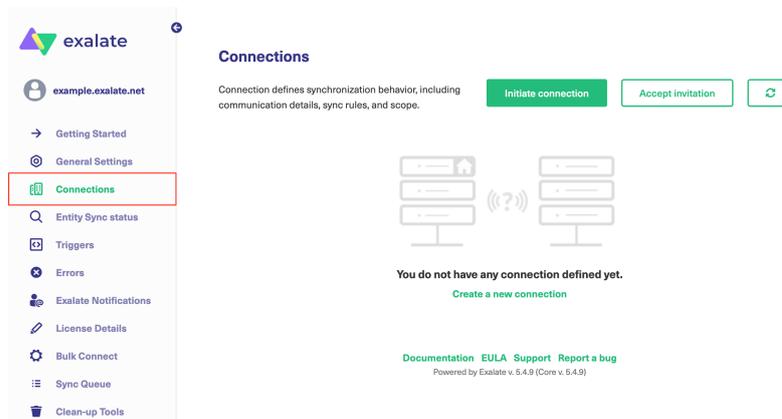
**Note:** You can upgrade a Basic connection to a Visual configuration mode for Jira Cloud, Jira On-premise, Azure DevOps, or Zendesk.

**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.



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

Connection	Issues under sync	Last sync	Status
Company A to Company B <small>Description of the connection lorem ipsum sit amet</small>	123	Issue TEST-777 46 minutes ago	Active

3. Click the **Upgrade button**.

Define the context for the synchronization: what issues you want to sync and how to start the synchronization process.  
Using Basic connection, you can only sync **Issues**.

#### 4. Select **Visual mode**.

### 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

Visual mode requires admin access to the destination side <https://svitlana-blue.exalate.net>

Verify admin access

Upgrade

#### 5. Click the **Verify admin access** button.

### Upgrade connection

Upgrade the connection for more features

#### Visual mode

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#### Script mode

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Visual mode requires admin access to the destination side <https://svitlana-blue.exalate.net>

Verify admin 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.



Exalate wants to set up a connection between <https://qayuratest001.atlassian.net> and <https://svitlana-blue.exalate.net>

<https://svitlana-blue.exalate.net> will be able to access the following data on <https://qayuratest001.atlassian.net>:

- Issues (including descriptions, attachments, and comments)
- Other entities available for **Mariana**

If you trust <https://svitlana-blue.exalate.net>, press Accept.

Decline

Accept

> Safe check details

6. Click the **Upgrade** button.

Once the verification is confirmed you can upgrade the connection.

**Upgrade connection** ✕

Upgrade the connection for more features

**BETA**

 **Visual mode**

- Low-code, visual interface
- Configure both sides of the connection using a single interface
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 **Script mode**

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- Configure each side of the connection separately
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 **Verification confirmed**

You can continue setting up the connection.

**Upgrade**

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

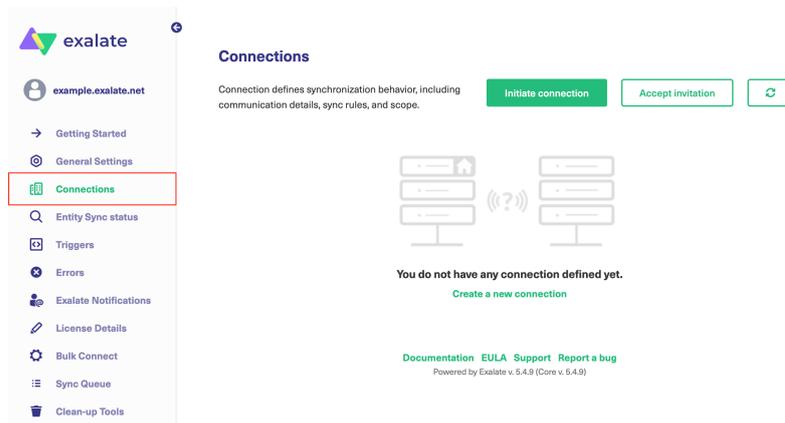
## How to Upgrade a Basic Connection to a Script Configuration Mode

**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:

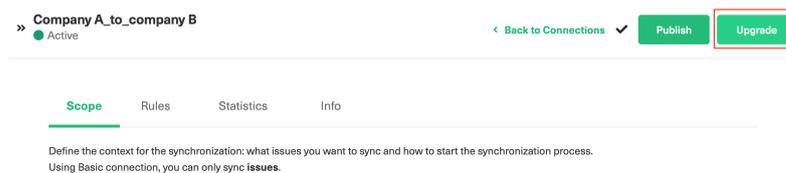
1. Navigate to the **Connections** tab in the Exalate console.



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

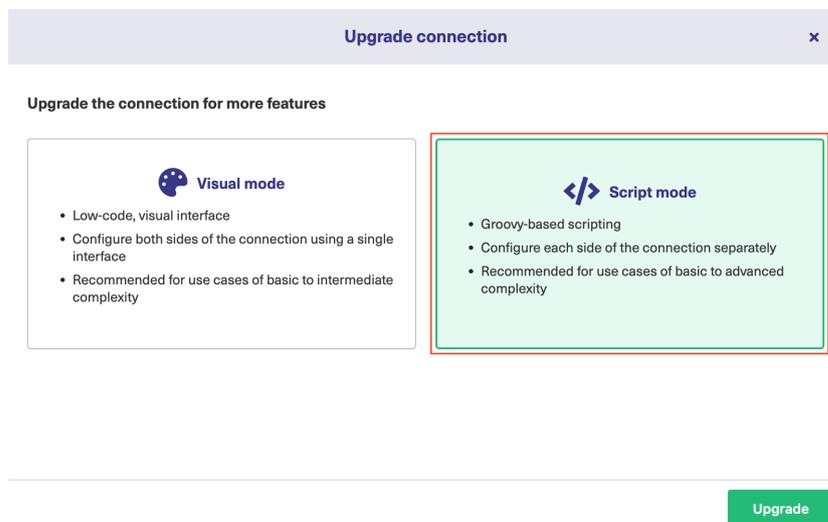
Connection	Issues under sync	Last sync	Status	
 Company A to Company B <small>Description of the connection lorem ipsum sit amet</small>	123	Issue TEST-777 46 minutes ago	Active	

3. Click the **Upgrade** button.



4. Select **Script mode**.

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



5. Click the **Upgrade** button.

## 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](#)

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

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