

Initiate a Connection in Script Mode for Freshdesk

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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 Script mode ensure that:

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

Initiate a Connection in Script Mode from Freshdesk

Note: It doesn't matter which side you start initiating the Connection from. The Exalate UI remains the same. If you are initiating the connection you become the source and the other side becomes the destination.

1. Navigate to the **Connections** tab in the Exalate console.
2. Click **Initiate connection**.

Connections

Connection defines synchronization behavior, including communication details, sync rules, and scope.

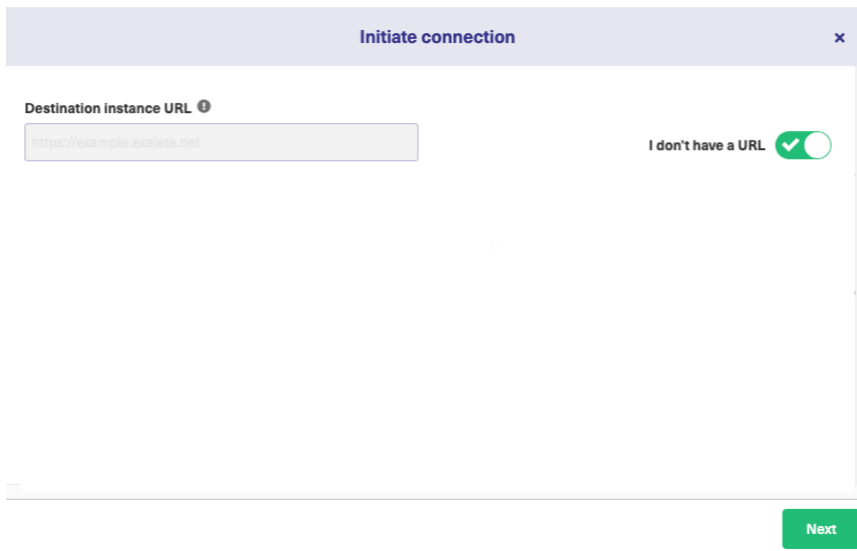
Initiate connection

Accept invitation



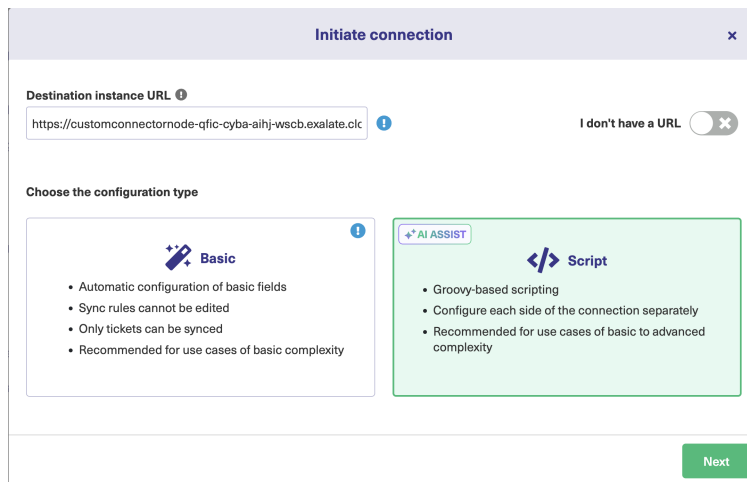
3. Enter the **Destination Instance URL**. The **Destination Instance URL** is the link to the instance you want to set up a connection with. You can directly enter the link of that instance or the **Exalate URL** from the **General Settings** tab in the Exalate admin panel.

[check image below]



Exalate suggests available Configuration Modes based on the destination instance.

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



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. Select a project where you would like to sync issues received from the destination side.

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Select a project for the incoming sync

Exalate generates default sync rules to synchronize basic issue fields. You can adapt the sync rules later. By default the following issue data will be synchronized: summary, description, comments, labels and attachments.

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

Select Project

[← Previous](#) Initiate

9. Click **Initiate**.

10. Click **Copy invitation code**.

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

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

Use the following invitation code:

[Copy invitation code](#)

Done

11. Click **Done**.

Product

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Note: When the other side accepts your invitation, your connection is activated. Refresh the **Connections** page to see the Connection status change.

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