

# How to Change the Proxy user for Salesforce

Last Modified on 03/25/2025 5:34 pm EDT

By default, Exalate sets the Salesforce user who installed the app as the Proxy user. However, you can change this user to fit your specifications.

First you'll need to create the user who will become the proxy user, keep in mind that this is the user that Exalate will use to update the tickets on behalf of the remote side of the integration.

You may also opt to use an API integration user as a proxy user, given that it has all the required permissions stated below:

Application Permissions:	
	Access unique user identifiers
	Perform requests at any time
	Manage Data Cloud Calculated Insight data
	Access Visualforce applications
	Access Headless Forgot Password API
	Access the identity URL service
	Manage Data Cloud profile data
	Manage Data Cloud Ingestion API data
	Access content resources
	Access Lightning applications
	Access Connect REST API resources
	Manage Data Cloud Identity Resolution
	Full access
	Perform segmentation on Data Cloud data
	Manage user data via Web browsers
	Access chatbot services
	Manage user data via APIs
	Perform ANSI SQL queries on Data Cloud data
	Manage Pardot services
	Access Analytics REST API Charts Geodata resources
	Access Headless Registration API
	Access Einstein GPT services
	Access all Data Cloud API resources
	Access Interaction API resources
	Access the Salesforce API Platform
	Access Analytics REST API resources
	Access custom permissions
	Access Headless Passwordless Login API

Once you have created/chosen who will be the Proxy user you may assign the Exalate Admin permission set:

## Assign Exalate Admin permission set

1. Go to **Setup** -> **Users** -> **Permissions sets** -> **Exalate Admin**.

**Setup** Home Object Manager

ADMINISTRATION

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  - Permission Sets**
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**Permission Sets**

On this page you can create, view, and manage permission sets.

In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#)

All Permission Sets Edit | Delete | Create New View

Action	Permission Set Label	Description
<input type="checkbox"/> Clone	Commerce Admin	Allow access to commerce admin features.
<input type="checkbox"/> Clone	<b>Exalate Admin</b>	
<input type="checkbox"/> Clone	Exalate User	
<input type="checkbox"/> Clone	Facility Manager	Lets users create, read, edit, and delete locations, sublocations, que...
<input type="checkbox"/> Clone	Merchandiser	Allow access to commerce merchandising features.
<input type="checkbox"/> Clone	Order Management Agent	Read Access to all entities enabled by Order Management
<input type="checkbox"/> Clone	Order Management Operations Manager	Access to all features enabled by Order Management
<input type="checkbox"/> Clone	Order Management Shopper	Limited access to Order Management features for Self Service

2. Click **Manage Assignments**.

**Permission Sets**

Permission Set **Exalate Admin** Video Tutorial

Find Settings... Clone **Manage Assignments**

**Permission Set Overview**

Description	API Name	ExalateAdmin
License	Namespace Prefix	exalate
Session Activation Required	Created By	mariana 05/11/2021, 08:48
Last Modified By	mariana	05/11/2021, 08:48

3. Click **Add Assignments**.

**Permission Sets**

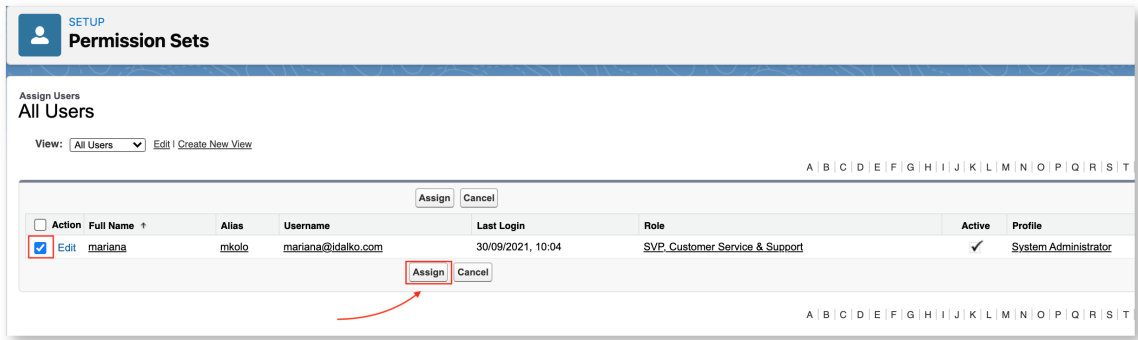
Assigned Users **Exalate Admin** « Back to: Permission Set

Add Assignments Remove Assignments

Full Name	Alias	Username	active	Profile
No records to display.				

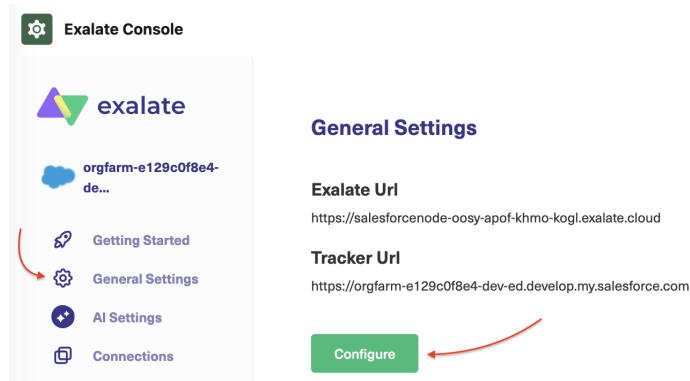
Add Assignments Remove Assignments

4. Select a user you want to give permissions to and click **Assign** to grant access to the Exalate console.



5. Click **Done**.

6. Go to your Exalate console and access the **General Settings** tab, then click on **Configure**:



7. On this window you will see the **Proxy User** field below:

### Configure General Settings


\*Tracker Url

\*Exalate Url

\*Organization type ⓘ

\*Consumer Key ⓘ

\*Consumer Secret ⓘ

\*Proxy User ⓘ  
 

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8. Click on the **Pencil Icon** to edit the proxy user, you will be prompted with a Salesforce login page to login, **the user who you log in with will become the new proxy user**.

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