Set up a Connection in Basic Mode for Asana

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This article describes how to set up a connection in basic mode between your Asana workspace and another system.

Basic Mode: Basic mode provides predefined field mappings that cover common synchronization scenarios including summary, description, comments, attachments and labels. It's perfect for teams who want to get started quickly without custom scripting.

Before you begin

Ensure you have:

- Asana workspace registered with Exalate
- Admin permissions in your Asana workspace
- Destination system configured with Exalate

Step 1: Initiate the connection

1. Log into your Exalate dashboard
2. Navigate to **Connections**
3. Click **Create Connection**
4. Select **Asana** as your platform
5. Choose your destination system
6. Select **Basic Mode**
7. Click **Continue**

[SCREENSHOT NEEDED: Exalate connection creation wizard showing Basic Mode selection]

Step 2: Configure basic settings

1. Enter a **Connection Name**
2. Select your **Asana workspace**
3. Choose the **destination project/space**
4. Set the **sync direction** (bidirectional or unidirectional)
5. Select **entity types** to sync (Tasks, Projects, or both)
6. Click **Create Connection**

Step 3: Configure triggers

Set up triggers to control which items are synchronized:

- **All tasks in workspace:** Syncs every task
- **Specific projects:** Select individual projects
- **Custom queries:** Use field-based filters (e.g., `projects="Engineering"`)

[SCREENSHOT NEEDED: Trigger configuration screen in Exalate]

Step 4: Test the connection

1. Create a test task in one of your configured Asana projects
2. Add description and a comment to the task
3. Wait 1-2 minutes for the sync to process
4. Check the destination system to verify the task appears
5. Make a change to test bidirectional sync

Basic mode limitations

Note: Basic mode has fixed field mappings and does not support custom fields or conditional logic. For advanced customization, use Script Mode.

More information

- How to Configure Triggers in Asana
- How to Sync Tasks in Asana
- How to Sync Projects in Asana

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