

Initiate a Private Connection in Basic Mode for Salesforce

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Note: For Private Connections:

- an instance you have access to is considered a public side.
- an instance you don't have access to is considered a private side: destination instance.

The main difference between private and public connection types is whether the HTTP/HTTPS requests are initiated from one side or from both sides. In this case, HTTP/HTTPS requests are initiated from the destination's private side only.

Introduction

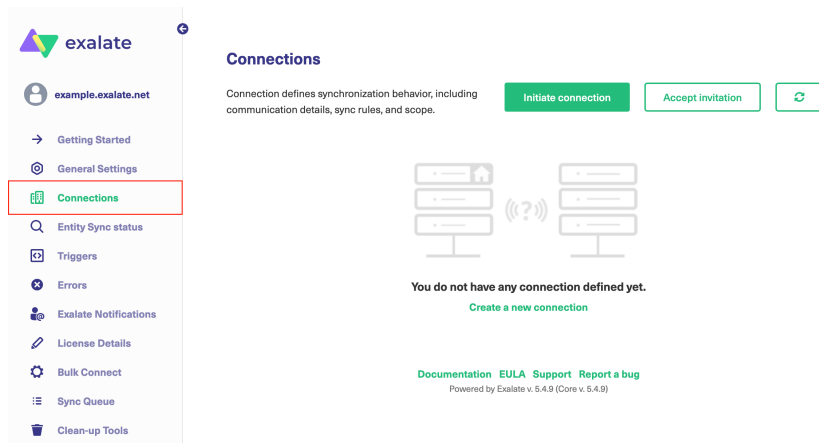
Connections in Basic mode have a set of **Sync Rules**, generated by Exalate. In Basic connections, you can only sync **cases**.

Note: You cannot modify **Sync Rules** in Basic Mode.

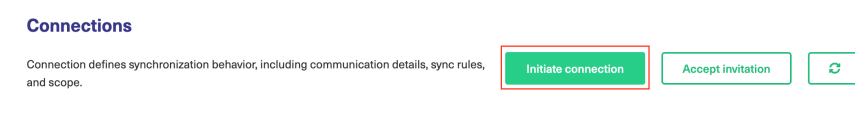
If you want to edit/delete Sync Rules, you can upgrade the connection to Visual Mode or Script Mode.

Initiate a Private Connection from Salesforce

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

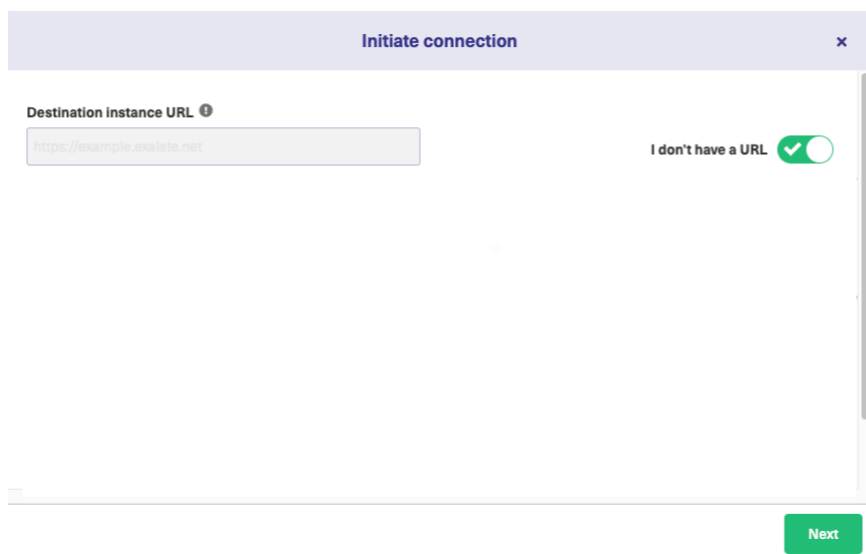


2. Click **Initiate Connection**.



3. Click **I don't have a URL**

If the destination instance is in a private network click **I don't have a URL**. Exalate suggests available connection types based on the destination instance's version of Exalate.



4. Choose a **Basic** connection mode.

Initiate connection


Destination instance URL ⓘ

https://example.exalate.net


✓

I don't have a URL

Choose the configuration type

 **Basic**

- Automatic configuration of basic fields
- Sync rules cannot be edited
- Only issues can be synced
- Recommended for use cases of basic complexity

 **Script**

- Groovy-based scripting
- Configure each side of the connection separately
- Recommended for use cases of basic to advanced complexity

Next

5. Click **Next**.

Initiate connection


Destination instance URL ⓘ

https://example.exalate.net


✓

I don't have a URL

Choose the configuration type

 **Basic**

- Automatic configuration of basic fields
- Sync rules cannot be edited
- Only issues can be synced
- Recommended for use cases of basic complexity

 **Script**

- Groovy-based scripting
- Configure each side of the connection separately
- Recommended for use cases of basic to advanced complexity

Next

8. Click **Next**.

Note: As this is a Public-Private connection and you don't have admin access to the other side, you can continue to configure on your end and then send an invitation to your partner.

9. Click **Copy Invitation Code**

Here you can copy the invitation code and send it over to your partner. The destination side is shown as "unknown" since this is a private side.

Initiate connection

Ensure that Exalate is installed on the destination side “unknown”

On the “unknown” side, you (or their application administrator) need to Accept the Invitation.

Use the following invitation code:

Copy invitation code

Done

10. Click **Done**

Once your partner accepts the invitation, you can start synchronization.

Note: When the connection is set up on the Public source side, the Private side administrator should accept the invitation in the Private-Public connection.

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