

How to Change the Proxy user for Salesforce

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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

Users

Permission Set Groups

Permission Sets **Exalate Admin**

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Data

Email

PLATFORM TOOLS

Apps

Feature Settings

Permission Sets

All Permission Sets | Edit | Delete | Create New View

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

2. Click **Manage Assignments**.

SETUP Permission Sets

Exalate Admin

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

Permission Set Overview

Description	API Name
License: Salesforce	ExalateAdmin
Namespace Prefix: exalate	
Session Activation Required: <input type="checkbox"/>	Created By: mariana
Last Modified By: mariana	05/11/2021, 08:48

3. Click **Add Assignments**.

SETUP Permission Sets

Assigned Users

Exalate Admin

« Back to: Permission Set

Add Assignments Remove Assignments

Full Name Alias Username Active Profile

No records 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.

Assign Users
All Users

View: All Users [Edit](#) | [Create New View](#)

Action	Full Name	Alias	Username	Last Login	Role	Active	Profile
<input type="checkbox"/>	Edit mariana	mkolo	mariana@idalko.com	30/09/2021, 10:04	SVP_Customer Service & Support	<input checked="" type="checkbox"/>	System Administrator

[Assign](#) [Cancel](#)

5. Click **Done**.

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

Exalate Console

General Settings

Exalate Url
https://salesforcenode-oosy-apof-khmo-kogl.exalate.cloud

Tracker Url
https://orgfarm-e129c0f8e4-dev-ed.develop.my.salesforce.com

[Configure](#)

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

Configure General Settings

*Tracker Url

https://orgfarm-e129c0f8e4-dev-ed.develop.my.salesforce.com

*Exalate Url

https://salesforcenode-oosy-apof-khmo-kogl.exalate.cloud

*Organization type [?](#)

Production

*Consumer Key [?](#)

*Consumer Secret [?](#)

*Proxy User [?](#)

daniel.carvajal828@agentforce.com

8. Click on the **Pencil Icon** to edit the proxy user, you will be prompted with a Salesforce Product [About](#) [Login](#) page to login, **the user who you log in with will become the new proxy user** .

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