

How to Use the Sync Panel

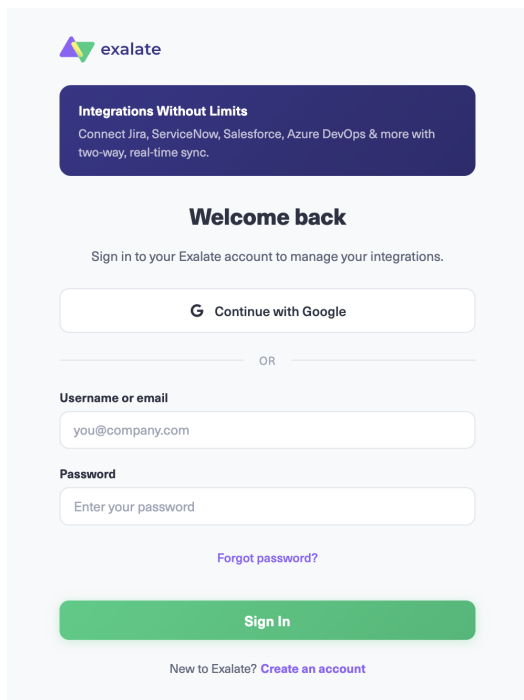
Last Modified on 04/29/2026 10:15 am EDT

The Sync Panel extension lets you check sync status and take sync actions directly from your system, without opening the Exalate app.

Create an Exalate Account

If you don't have an Exalate account yet, you'll need to create one before you can use the panel.

1. Open the [Exalate extension](#) from your browser toolbar.
2. Click **Create an account** at the bottom of the login screen.



The screenshot shows the Exalate login interface. At the top left is the Exalate logo. Below it is a dark blue box with the text "Integrations Without Limits" and "Connect Jira, ServiceNow, Salesforce, Azure DevOps & more with two-way, real-time sync." The main heading is "Welcome back" followed by the instruction "Sign in to your Exalate account to manage your integrations." There is a "Continue with Google" button. Below that is a horizontal line with "OR" in the center. The "Username or email" field contains "you@company.com". The "Password" field contains "Enter your password". There is a "Forgot password?" link. At the bottom is a green "Sign In" button and a link for "New to Exalate? Create an account".

3. Fill in your **First name**, **Last name**, **Business Email**, and **Password** (minimum 12 characters).



Create your account

Business email required

 Sign up with Google

or

First name

Last name

Business Email

Password



Sign In >

Already have an account? [Sign in](#)

Alternatively, click **Sign up with Google** to use a managed Google Workspace account.

4. Click **Sign In**.

5. Check your inbox for a verification email and click the link inside to activate your account.

6. Return to the extension.

Note: Personal email addresses (such as gmail.com or yahoo.com) and personal Google accounts are not accepted. You must use a business email.

Once your account is verified, you're taken directly to the panel.

Log in to the Sync Panel Extension

1. Open the Exalate extension from your browser toolbar.

2. Enter your **Email** and **Password**, then click **Sign In**.



Welcome back

Sign in to your Exalate account

or

Email

Password

No account? [Create one](#)

Alternatively, click **Continue with Google**.

The panel keeps you logged in across sessions. You'll only be asked to log in again when your session has fully expired.

If you haven't verified your email yet, login is blocked — use the resend option to get a new verification email.

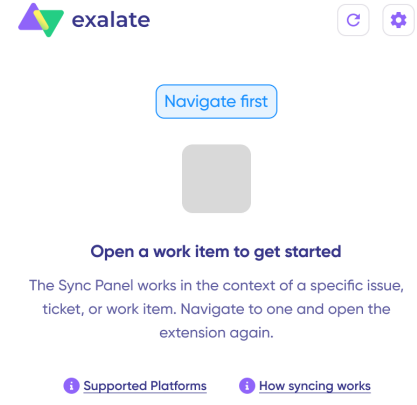
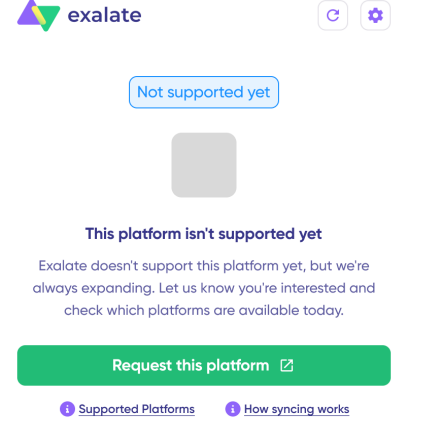
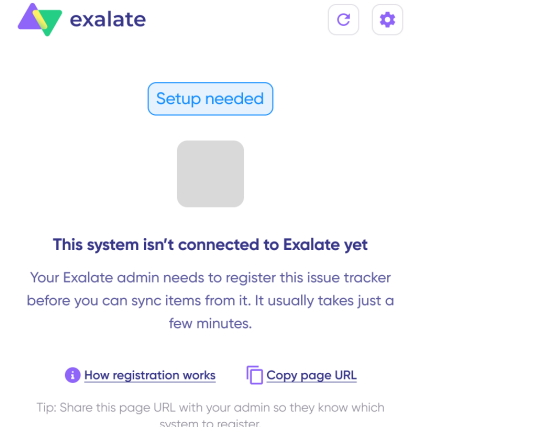
Note: If you open the Exalate App directly in a browser tab, you'll see a page indicating that your account doesn't have admin access. This is expected — Sync Panel accounts are scoped to the extension.

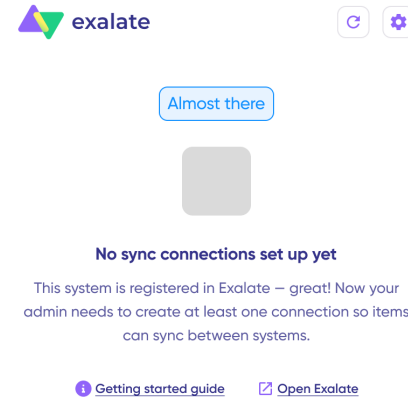
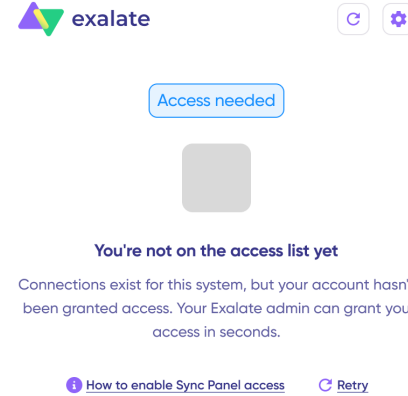
View Sync Status

Open the panel on any item that you want to sync or view the sync status for. The Sync Panel shows the sync state for that item.

The panel checks a few things before showing connection data — if something isn't set up yet, you'll see one of these states:


What you see	What it means
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What you see	What it means
<p data-bbox="229 232 647 259">"Open a work item to get started"</p>  <p>The screenshot shows the Exalate logo and navigation icons at the top. A blue button labeled 'Navigate first' is centered. Below it is a grey square placeholder. The main heading is 'Open a work item to get started'. The text below explains that the Sync Panel works in the context of a specific issue, ticket, or work item, and instructs the user to navigate to one and open the extension again. At the bottom, there are two links: 'Supported Platforms' and 'How syncing works'.</p>	<p data-bbox="847 450 1385 524">You're not on an issue, ticket, or work item page. Navigate to one first.</p>
<p data-bbox="229 777 655 804">"This platform isn't supported yet"</p>  <p>The screenshot shows the Exalate logo and navigation icons. A blue button labeled 'Not supported yet' is centered. Below it is a grey square placeholder. The main heading is 'This platform isn't supported yet'. The text explains that Exalate doesn't support this platform yet but is always expanding, and asks the user to let them know if they're interested and check which platforms are available today. A green button labeled 'Request this platform' with an external link icon is prominent. At the bottom, there are two links: 'Supported Platforms' and 'How syncing works'.</p>	<p data-bbox="855 1008 1362 1034">Exalate doesn't support your system yet.</p>
<p data-bbox="229 1299 775 1326">"This system isn't connected to Exalate yet"</p>  <p>The screenshot shows the Exalate logo and navigation icons. A blue button labeled 'Setup needed' is centered. Below it is a grey square placeholder. The main heading is 'This system isn't connected to Exalate yet'. The text explains that the Exalate admin needs to register this issue tracker before the user can sync items from it, and that it usually takes just a few minutes. At the bottom, there are two links: 'How registration works' and 'Copy page URL'. A tip at the very bottom says: 'Tip: Share this page URL with your admin so they know which system to register.'</p>	<p data-bbox="847 1509 1394 1583">Your admin needs to register this system in Exalate.</p>


What you see	What it means
<p data-bbox="229 232 638 259">"No sync connections set up yet"</p>  <p>The screenshot shows the Exalate interface with the title "No sync connections set up yet". It includes the Exalate logo, a refresh icon, and a settings icon. A blue button labeled "Almost there" is at the top. Below it is a grey square placeholder. The main text reads: "No sync connections set up yet. This system is registered in Exalate – great! Now your admin needs to create at least one connection so items can sync between systems." At the bottom, there are two links: "Getting started guide" and "Open Exalate".</p>	<p data-bbox="849 434 1378 510">The system is registered, but there are no active connections.</p>
<p data-bbox="229 752 638 779">"You're not on the access list yet"</p>  <p>The screenshot shows the Exalate interface with the title "You're not on the access list yet". It includes the Exalate logo, a refresh icon, and a settings icon. A blue button labeled "Access needed" is at the top. Below it is a grey square placeholder. The main text reads: "You're not on the access list yet. Connections exist for this system, but your account hasn't been granted access. Your Exalate admin can grant you access in seconds." At the bottom, there are two links: "How to enable Sync Panel access" and "Retry".</p>	<p data-bbox="849 1120 1378 1236">Connections exist, but your email domain hasn't been granted access. Contact your admin.</p>

Once everything is set up, you'll see the work item's sync state:


- **Not synchronized** — the item hasn't been synced yet. See **Sync Now** in the next step.





PRJ-420
Not synchronized






Ready to sync


Sync Now to create a linked copy of this item on another system. Once synced, updates flow both ways automatically.

Sync Now


- **Synced** — the item is connected and in sync.







PRJ-420
1 connection 1 synced

Product Development Synced 




1845906
Engineering Team



Work item



Unlink

+ Sync with another connection


- **Syncing...** — a sync operation is in progress.






PRJ-420
1 connection

Product Development Syncing... 



Step 3 of 6 – Preparing

Cancel

+ Sync with another connection

- **Error** — something went wrong with the last sync. Contact administrator to find out more about error.

The screenshot shows the Exalate interface. At the top left is the Exalate logo. To its right are two icons: a refresh icon and a settings icon. Below this is a header bar for project PRJ-420, showing '2 connection', '1 synced', and '1 error'. The main content area contains two collapsible cards. The first card, 'Product Development', is expanded and shows a 'Synced' status. The second card, 'Marketing Sales Int', is expanded and shows an 'Error' status. Inside this card, there is a sub-card for '1845906' from the 'Engineering Team', which is a 'Work item'. A red error message box states: 'Something went wrong with the last sync. Try syncing again, or let your admin know if it keeps happening.' Below this message are two buttons: 'Retry sync' and 'Unlink'. At the bottom of the interface is a button labeled '+ Sync with another connection'.

If the item has multiple connections, each one appears as a separate collapsible card. The header shows a summary, e.g. "2 connections · 1 synced · 1 error".

Sync Now

Sync Now is available when an item shows **Not synchronized**.



PRJ-420

Not synchronized

< Choose a connection

🔍 Search connections...



Marketing Sales Int

Marketing Team → Sales Team



Product Development

Product Team → Engineering Team ✓



Customer Support

Support Team → Quality Assurance



Customer Relations

Advocacy Team → Solutions Team

Start Sync

1. Click **Sync Now** on the panel.
2. On the **Choose a connection** screen, select the connection you want to use.
3. Click **Start Sync**.

The panel shows progress ("Step X of 6") while the sync runs. Once complete, the item moves to the **Synced** state, and the connected item appears in the panel. You can also navigate to the remote item using the link displayed.

To sync the same item with an additional connection, click + **Sync with another connection**.

The screenshot shows the Exalate interface for a connection named 'PRJ-420' with '1 connection'. The connection is in a 'Syncing...' state. A progress bar shows 'Step 3 of 6 - Preparing' with a green checkmark on the first step and a blue starburst on the second. A 'Cancel' button is visible below the progress bar. At the bottom, there is a button labeled '+ Sync with another connection'.

If the sync fails, the item moves to the **Error** state.

Unlink

Unlink removes the sync between the current item and its remote counterpart. It's available for the **Synced** or **Error** states.

The screenshot shows the Exalate interface for a connection named 'PRJ-420' with '1 connection' and '1 synced'. The connection is in a 'Synced' state. A card for '1845906' from the 'Engineering Team' is shown with a 'Work item' link. A confirmation dialog is displayed, asking 'Unlink this connection?' and stating: 'This will stop the sync and remove the link between with 1845906. The items won't be deleted.' The dialog has 'Unlink' and 'Cancel' buttons. At the bottom, there is a button labeled '+ Sync with another connection'.

1. Click **Unlink** on the connection card.
2. Review the confirmation message — this will stop the sync and remove the link between

items. The items themselves won't be deleted.

3. Click **Unlink** to confirm, or **Cancel** to go back.

Once unlinked, the item returns to the **Not synchronized** state.

Error State

If a sync connection shows an **Error**, the panel displays: *"Something went wrong with the last sync. Try syncing again, or let your admin know if it keeps happening."*

You can click **Retry sync** button to attempt the sync again immediately.

The screenshot shows the Exalate Sync Panel interface. At the top, the Exalate logo is on the left, and refresh and settings icons are on the right. Below this is a header for 'PRJ-420' with a status of '2 connection 1 synced 1 error'. The main content area is divided into two sections. The first section, 'Product Development', is in a 'Synced' state. The second section, 'Marketing Sales Int', is in an 'Error' state. This section includes a 'Work item' link and a red error message: 'Something went wrong with the last sync. Try syncing again, or let your admin know if it keeps happening.' Below the message are two buttons: 'Retry sync' and 'Unlink'. At the bottom of the panel is a button labeled '+ Sync with another connection'.

The remote item link and **Unlink** option remain available even in the error state.

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