Manual Synchronization for Salesforce

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Before we start the synchronization process:

Test your Connection from Salesforce

Manual synchronization in Salesforce happens via the **Exalate** button in the Sync Status Panel present under the Salesforce Object view.

> **Note**: The Sync Status Panel is available under the specific entity (i.e issue, work item, tickets, Cases, etc) view in Jira, Zendesk, Azure DevOps, and Salesforce.
>
> For other platforms like GitHub, ServiceNow, HP ALM/QC including Jira, Zendesk, Azure DevOps, and Salesforce this button is available under the Exalate admin console in the **Entity Sync Status** tab.

Exalate the Entities from Salesforce.

1. Open the particular Salesforce entity.

There is an Exalate panel under the entity view.
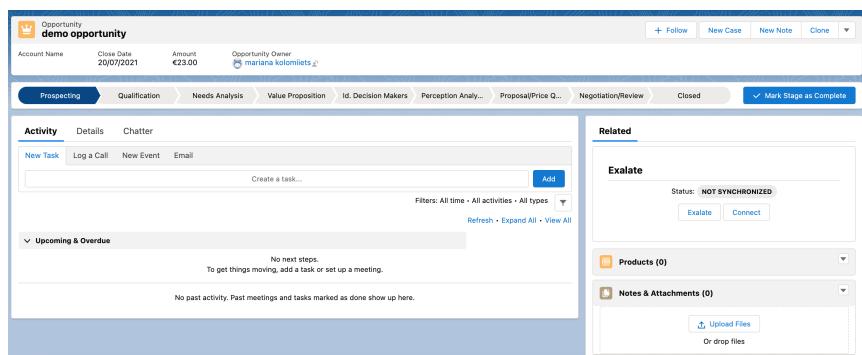
> **Note**: Learn how to add the sync panel to Salesforce entity views.

2. **Exalate** the Entity

You can see 2 buttons at the bottom on the Exalate panel: **Exalate** & **Connect**. If the entity is not synchronized the following status will be displayed.
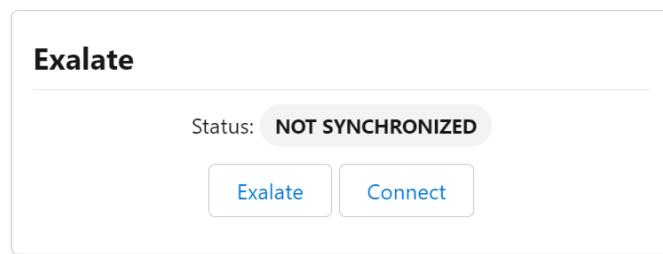
Exalate allows you to synchronize & create a new entity on the destination instance.

Connect allows you to connect 2 existing entities present in both instances.

> 2.1. To Exalate an entity, click the **Exalate** button.
>
> 2.2. Choose the name of the Connection you have created.
>
> 2.3. Click **Submit**.

You will be able to see the progress of the synchronization within the panel in the form of sync statuses.
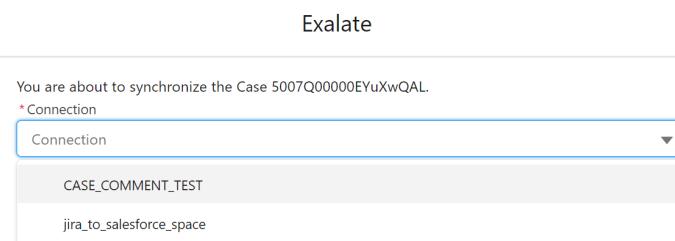
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