

Install Exalate for Salesforce

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Introduction

In this article, we are going to show you how to:

- Install Exalate on Salesforce from the AppExchange
 - Generate a security token to log into the Exalate Admin console on Salesforce.
- [Install Exalate on Salesforce on Docker](#).

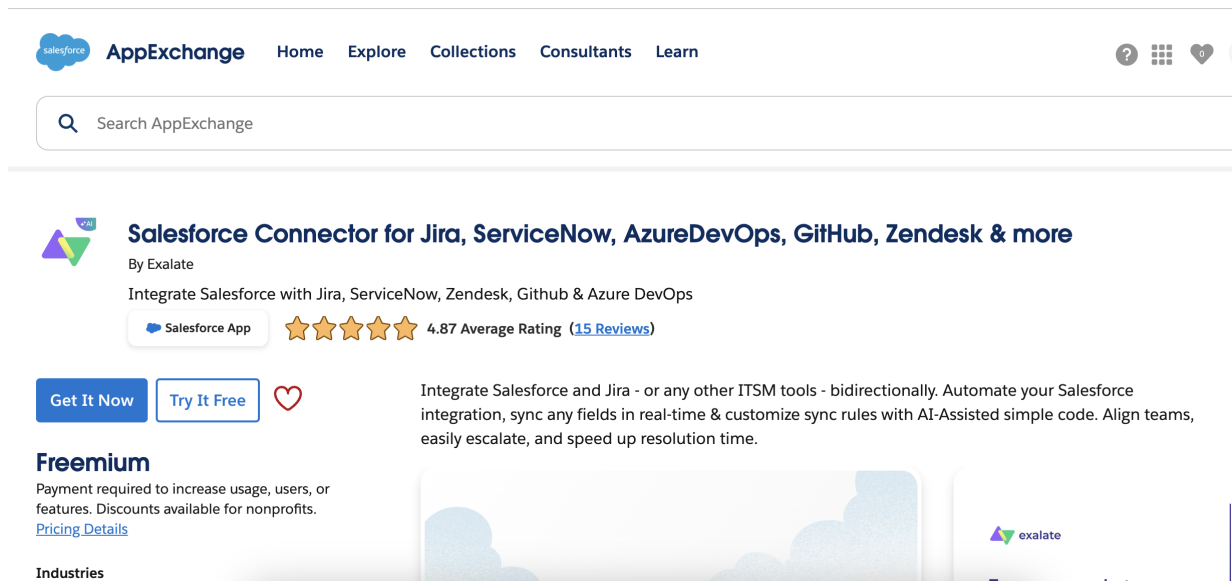
Install Exalate on Salesforce from the AppExchange

Note: When installing Exalate for Salesforce, the account used to initiate the installation will automatically be designated as the proxy user. If you plan to use an Integration User, ensure that the user is created and set up beforehand, then proceed with the installation using that account.

This article describes how to install Exalate to Salesforce from the AppExchange marketplace.

1. Access the [AppExchange marketplace](#) and search for the Exalate app

2. Click **Get it Now** to install it on Production



The screenshot shows the Salesforce AppExchange interface. At the top, there's a navigation bar with the Salesforce logo, 'AppExchange', and links for Home, Explore, Collections, Consultants, and Learn. A search bar is located below the navigation bar. The main content area displays the 'Salesforce Connector for Jira, ServiceNow, AzureDevOps, GitHub, Zendesk & more' app by Exalate. The app description states: 'Integrate Salesforce with Jira, ServiceNow, Zendesk, Github & Azure DevOps'. It features a 'Salesforce App' badge, a 4.87 average rating from 15 reviews, and a 'Freemium' pricing model. The 'Get It Now' button is highlighted. A description of the app's functionality is provided: 'Integrate Salesforce and Jira - or any other ITSM tools - bidirectionally. Automate your Salesforce integration, sync any fields in real-time & customize sync rules with AI-Assisted simple code. Align teams, easily escalate, and speed up resolution time.'

or Click **Try It Free** to install it on Sandbox



Start Your Trial

Step 1 Choose a trial type

Here's how you can try out this solution. [Learn about trial types.](#)



Try in your sandbox

- ✔ Test before deploying to production
- ✔ Explore with your data & configurations
- ✔ Manage installation & setup yourself



Website
<https://>
Email
[support](#)
Phone
[+32 3 3](#)

Step 2 Share your contact info

Here's what we found in your Trailblazer account. To edit anything, go your account.

First Name

Last Name



Note: For alternative installation on the Sandbox instance, append
/packaging/installPackage.apexp?p0=04tQs00000014hVIAQ to your sandbox URL.

For example: `https://{mydomain--
sandbox.salesforce.com}/packaging/installPackage.apexp?p0=04tQs00000014hVIAQ`

3. Confirm installation details

Where do you want to install this package?

Install in a Production Environment

Install this package in the org where you or your users work, including Developer Edition orgs.

* Connected Salesforce Accounts ⓘ

[Dropdown menu with account names] [Refresh icon]

Don't see your account? [More Info](#)

Install in Production

[Cancel](#)

- Fill out the required fields
- Check that you have read and agree to the terms and conditions
- Click **Confirm and Install**

APPEXCHANGE HOME

Search AppExchange

All Apps

Exalate Connector for Salesforce, Jira, ServiceNow, AzureDevOps, GitHub, Zendesk

by Exalate

Confirm installation details Exalate Connector for Salesforce, Jira, ServiceNow, AzureDevOps, GitHub, Zendesk ?

Review the customization guide for installation and configuration steps.

package	Version
Exalate Bridge App v2	ver 0.5 / 0.5.0
Subscription	Organization
Free	Exhale BV
Duration	Number of Subscribers
Does Not Expire	site-wide
User Name	
jose@exalate.sandbox	

Tell us about yourself

* First Name

* last name

Job Title

* Company

* Email

Phone

* Country

Choose...

* State

Choose...

I have read and agree to the [terms and conditions](#).

Salesforce.com Inc. is not the provider of this application but has conducted a limited security review. [Learn More](#) about the [AppExchange Security Review](#).

☐

Allow the provider to contact me by email, phone, or SMS about other products or services I might like

cancel

Confirm and Install

4. Log in to your Salesforce account

You are automatically redirected to the Salesforce login screen once you confirm the installation

salesforce

Username

user@example.com

Password

.....

Log In

☐ Remember me

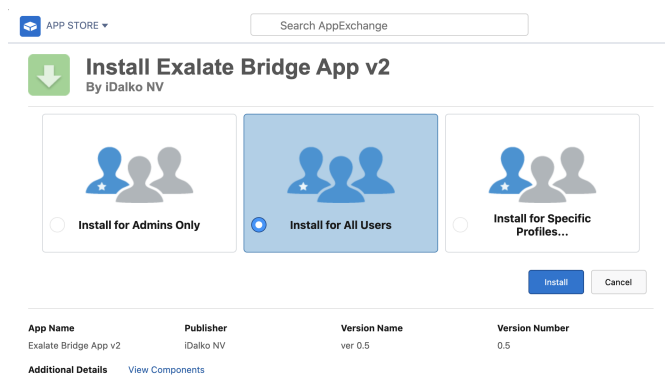
[Forgot Your Password?](#)

5. Select a group of users that has permission to use the Exalate app

If you install Exalate for **Admins Only**, only the administrators have permission to use Exalate. You can grant permissions to other users later. Check out [How to manage users' permissions in Exalate for Salesforce](#).

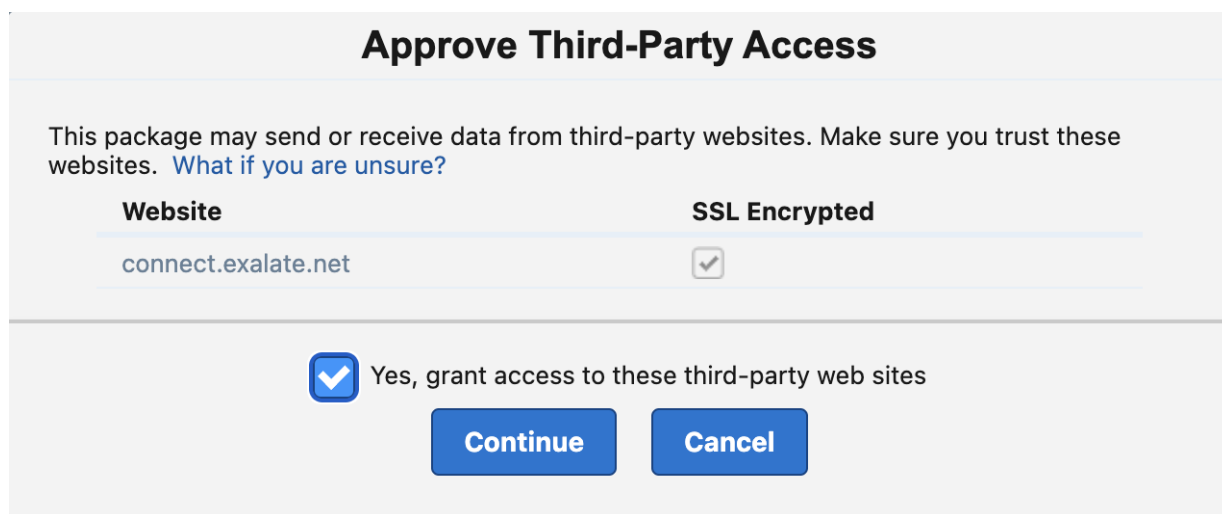
Installing Exalate for **All Users** grants permission to use the app to all registered users.

If you choose to install Exalate for **Specific Profiles**, you see the list of the available profiles and their permissions that should be set before you proceed.



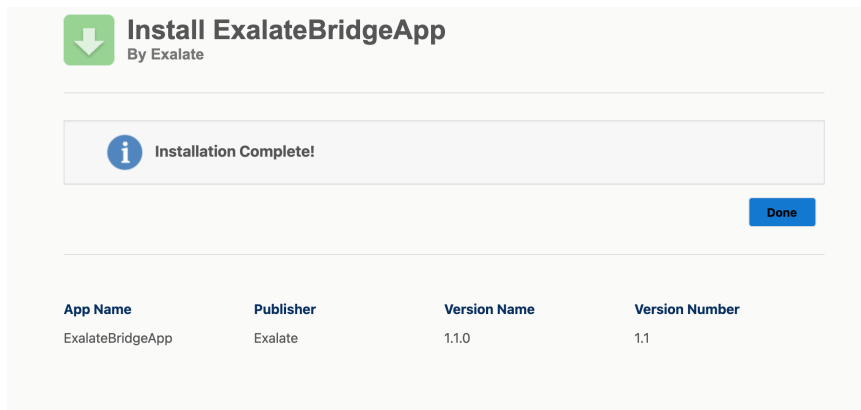
6. Click Install

7. Approve third-party access



- Check **Yes, grant access to these third-party websites**
- Click **Continue**

8. Installation complete. Click Done to go back to your Salesforce instance



9. Add new trusted URL

- Go to **Setup** and search for **Trusted URLs**
- Click **Add new trusted URL**

Trusted URL Information

API Name:

URL:

Description:

Active: ☒

Content Security Policy (CSP) Settings

To help prevent cross-site scripting (XSS) and other code injection attacks, the Lightning component framework uses CSP to impose restrictions on content. To control which pages can load content from this trusted URL, select the CSP context.

CSP Context:

CSP Directives

Select the directives that Lightning components, third-party APIs, and WebSocket connections can load from this trusted URL. Each CSP directive controls access to a resource type. Lightning components can load the resources within Lightning or within your CSP-secured [Aura or LWR sites](#).

To use the [Salesforce Console Integration Toolkit](#) from within this trusted URL, select the connect-src (scripts) directive. Then add the trusted URL in the Security settings of Experience Builder for your [Visualforce sites](#). When you select that directive, connections from Lightning to this trusted URL can use the Javascript methods in the toolkit. Otherwise, you can't load JavaScript resources from a third-party, even if it's a trusted URL. To use a JavaScript library from a third-party, add the third-party URL to a static resource, and then add the static resource to your component.

connect-src (scripts): ☒

font-src (fonts): ☒

frame-src (frame content): ☒

img-src (images): ☒

media-src (audio and video): ☒

style-src (stylesheets): ☒

Permissions Policy Directives

- Fill in **Trusted URL Information**:
 - API Name: free input string
 - URL: ***.exalate.cloud**
- Check all the boxes in **CSP Directives** section
- Click **Save**

10. Next, you need to set the Permissions. Go to **Setup> Permission sets**.

SETUP
Permission Sets

Permission Sets Help for this Page

On this page you can create, view, and manage permission sets.

In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#) | [Android](#)

All Permission Sets | [Edit](#) | [Delete](#) | [Create New View](#)

Action	Permission Set Label	Permission Sets - Salesforce - Developer Edition	License
<input type="checkbox"/> Clone	Buyer	Allows access to the store. Lets users see products and categorie...	B2B Buyer Permission Set One Seat
<input type="checkbox"/> Clone	Buyer Manager	Includes all Buyer capabilities, and allows access to manage cart...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/> Clone	CRM User	Denotes that the user is a Sales Cloud or Service Cloud user.	CRM User
<input type="checkbox"/> Clone	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seat
<input type="checkbox"/> Clone	Contact Center Admin	Manage Service Cloud Voice contact centers that use Amazon C...	Service Cloud Voice User
<input type="checkbox"/> Clone	Contact Center Agent	Access agent features in Service Cloud Voice contact centers tha...	Service Cloud Voice User
<input type="checkbox"/> Clone	Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact center...	Service Cloud Voice User
<input type="checkbox"/> Clone	Exalate Admin		Salesforce
<input type="checkbox"/> Clone	Exalate User		

To assign a permission set to a user, go through these steps: **Exalate Admin > Manage Assignments > Add assignment > Select User with System Administrator Profile > Assign > Done.**

11. Create the New External Client App

The next step is to create the New External Client App. Go to **Setup > Apps > App Manager** and click on **New External Client App**.

SETUP
Lightning Experience App Manager

[New Lightning App](#) [New External Client App](#)

24 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type, App Type

	App Name	Developer Name	Description	Last Modified	App Type	Visible
1	All Tabs	AllTabSet		14.01.2025, 18:16	Classic	<input type="checkbox"/>
2	Analytics Studio	Insights	Build CRM Analytics dashboards and apps	14.01.2025, 18:16	Classic	<input checked="" type="checkbox"/>
3	App Launcher	AppLauncher	App Launcher tabs	14.01.2025, 18:16	Classic	<input checked="" type="checkbox"/>
4	Approvals	Approvals	Manage approvals and approval flows	14.01.2025, 18:16	Lightning	<input checked="" type="checkbox"/>
5	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for yo...	14.01.2025, 18:20	Lightning	<input checked="" type="checkbox"/>
6	Community	Community	Salesforce CRM Communities	14.01.2025, 18:16	Classic	<input checked="" type="checkbox"/>

Fill in these fields:

- **External Client App Name**
- **API Name**
- **Contact Email**
- In **API (Enable OAuth Settings)**, check **Enable OAuth Settings**
- In the **Callback URL** field paste: <https://connect.exalate.net/rest/oauth/callback>
- Select and add all rows in **Selected OAuth Scopes**
- **Require Secret for Web Server Flow** should be selected
- **Require Secret for Refresh Token Flow** is optional

Important: Do not select **Require Proof Key for Code Exchange (PKCE)**!

In case this field is not editable, or this feature is required by your organization, please [contact support](#) for help with the additional steps required.

This issue is being addressed and will be resolved in an upcoming release.

API (Enable OAuth Settings)

☒ Enable OAuth

App Settings

* Callback URL
https://connect.exalate.net/rest/oauth/callback

OAuth Scopes

Available OAuth Scopes

Selected OAuth Scopes

- Access the identity URL service (id, profile, email, address, phone)
- Manage user data via APIs (api)
- Manage user data via Web browsers (web)
- Full access (full)
- Access Connect REST API resources (chatter_api)
- Access Visualforce applications (visualforce)

☐ Introspect all Tokens
☐ Configure ID token

Flow Enablement

- ☐ Enable Client Credentials Flow
- ☐ Enable Authorization Code and Credentials Flow
- ☐ Enable Device Flow
- ☐ Enable JWT Bearer Flow
- ☐ Enable Token Exchange Flow

Security

- ☒ Require secret for Web Server Flow
- ☒ Require secret for Refresh Token Flow
- ☐ Require Proof Key for Code Exchange (PKCE) extension for Supported Authorization Flows
- ☐ Enable Refresh token rotation
- ☐ Issue JSON Web Token (JWT)-based access tokens for named users

Cancel Create

Click **Create** when done.

Important: Wait 10-20 minutes after creating the External Client App Name for the changes to be fully applied.

Go to **Setup > Apps > External Client Apps > External Client App Manager > Your created App > Settings > OAuth settings** and collect the **Consumer Key** and **Consumer Secret** from the External Client App.

OAuth Settings

App Settings

Consumer Key and Secret

* Callback URL
https://connect.exalate.net/rest/oauth/callback

OAuth Scopes

Available OAuth Scopes

Selected OAuth Scopes

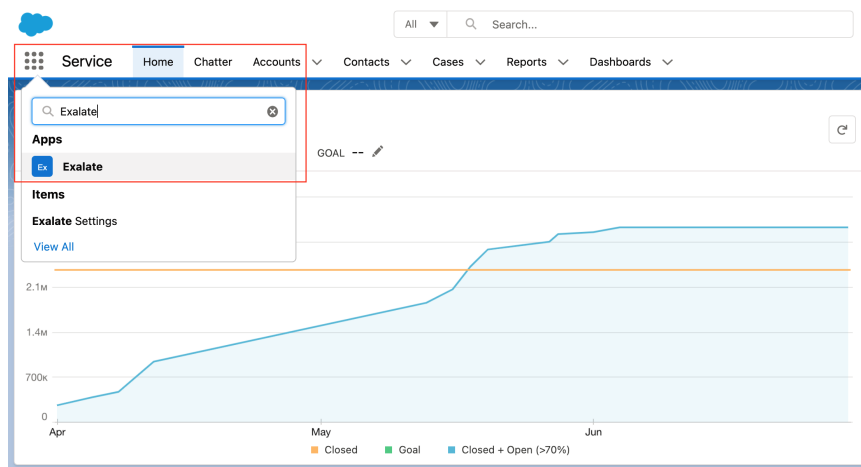
- Access the identity URL service (id, profile, email, address, phone)
- Manage user data via APIs (api)
- Manage user data via Web browsers (web)

[illegible]


12. Request an Exalate node

Once the application is installed, you can request an Exalate node:

- Access the Exalate app from the search bar





- Copy the **Consumer Key** and **Secret** from the External Client App and paste here, then click on **Request Node**.





Exalate


Exalate Console















Search...



Exalate Console

We are preparing to create a node in the background, please wait.

Consumer Key

Consumer Secret

Request Node

- Click **Allow** on the app permissions.

- Access Analytics REST API Charts Geodata resources
- Manage hub connections
- Manage Pardot services
- Access Lightning applications
- Access content resources
- Manage Data Cloud Ingestion API data
- Manage Data Cloud profile data
- Perform ANSI SQL queries on Data Cloud data
- Access chatbot services
- Perform segmentation on Data Cloud data
- Manage Data Cloud Identity Resolution
- Access Headless Forgot Password API
- Manage Data Cloud Calculated Insight data
- Access Headless Registration API
- Access the Salesforce API Platform
- Access Interaction API resources
- Access all Data Cloud API resources
- Perform requests at any time

Do you want to allow access for
teja.buthada@exalate.com? (Not you?)

To revoke access at any time, go to your personal settings.

After you allow the permissions you are being redirected back to the Salesforce interface.

Note: Exalate console may render in a few minutes.

13. Configure Exalate for Salesforce

Once you have requested the node it is time to configure it. Follow the steps listed below:

1. Fill in your contact information in the registration form. Exalate sends you a verification email. With this info Exalate:

- Verifies your instance.
- Activates an evaluation license.
- Makes an admin account to receive error notifications.

The screenshot shows the Exalate Console interface. At the top, there's a navigation bar with the Exalate logo and a search bar. Below the navigation bar, the main content area is titled "Exalate Console". On the left side, there's a sidebar with the Exalate logo and a list of items, including "exalate-a5-dev-ed.dev..." and "Registration". The main content area displays the "Registration" form. The form has the following fields: "Email" (with a dropdown arrow), "Contact name", "Organization", and "Phone". The "Email" field contains "user@example.com", "Contact name" contains "User", "Organization" contains "Exalate", and "Phone" contains "12-123-1234". At the bottom of the form, there's a line of text: "By clicking Agree and submit below, you agree to our End User License Agreement". Below this line, there are links for "More Integrations", "Documentation", "EULA", "Support", and "Report a bug". At the very bottom, it says "Powered by Exalate v. 5.5.5 (Core v. 5.5.5)".

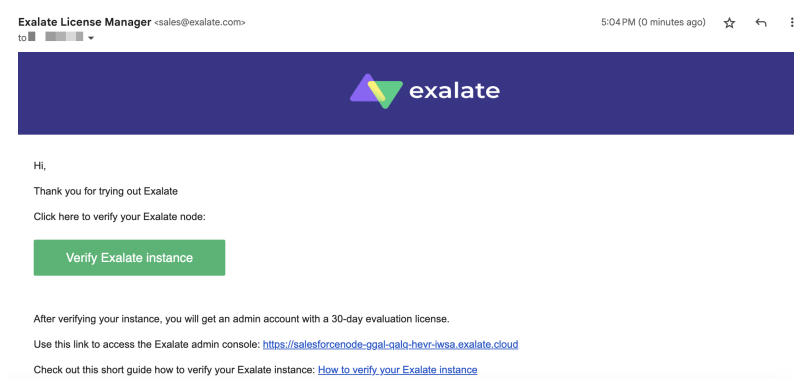
2. Click **Agree and submit**, to agree to the [EULA](#) and continue.

Note: After clicking **Agree and submit**, you accept our End User License Agreement (EULA). You can read it here: <https://static.exalate.com/legal/eula-addons.pdf>

Click **Resend email** if you have not received a confirmation email. Click **Change email** to modify the email address provided earlier.

Note: If you encounter an error during verification, check out [Solving issues with email verification](#).

3. Open your email and click **Verify Exalate instance**



4. Once you receive the email and verify the registration of the node, you are redirected to the Exalate **console admin > Connections** screen.

Congratulations! The registration process has been completed.

Install Exalate for Salesforce on Docker

You can host Exalate for Salesforce on your own server. To do so, you need to install Exalate on Docker.

Note: You need to install Docker. Check the [docker documentation](#) for more details.

1. How to install Exalate for Salesforce on Docker?

1.1. Create or download the docker-compose.yml

1.2. Ensure that a correct database is set up using a createdb.sh

1.3. Set environment variables if necessary

- 1.4. Register the node
- 1.5. Start the application
- 2. Troubleshooting

Note: Check out the [how to host Exalate for Salesforce on your own server detailed guide](#).

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