

Set up a Connection in Basic Mode for Salesforce

Last Modified on 01/15/2026 7:22 pm EST

Note: Before you set up a Connection in Basic mode ensure that you don't use an older version of Exalate.

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

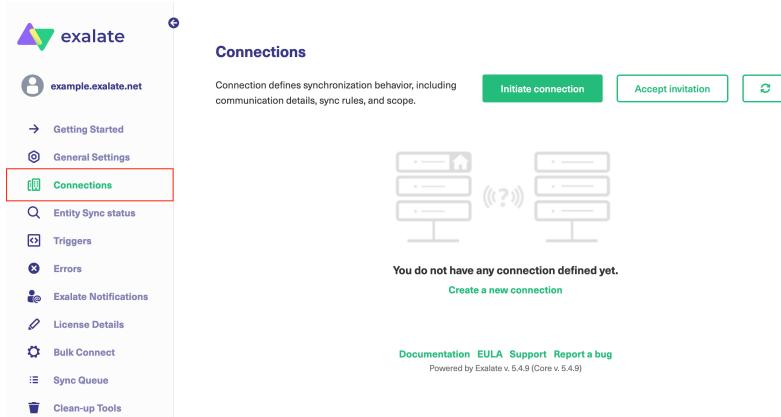
Note: You cannot modify **Sync Rules** in Basic Mode.

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

Initiate a Connection in Basic Mode from Salesforce

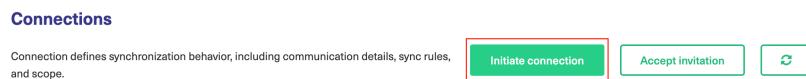
Note: It doesn't matter which side you start initiating the Connection from. The Exalate UI remains the same.

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



Click **Connections**.

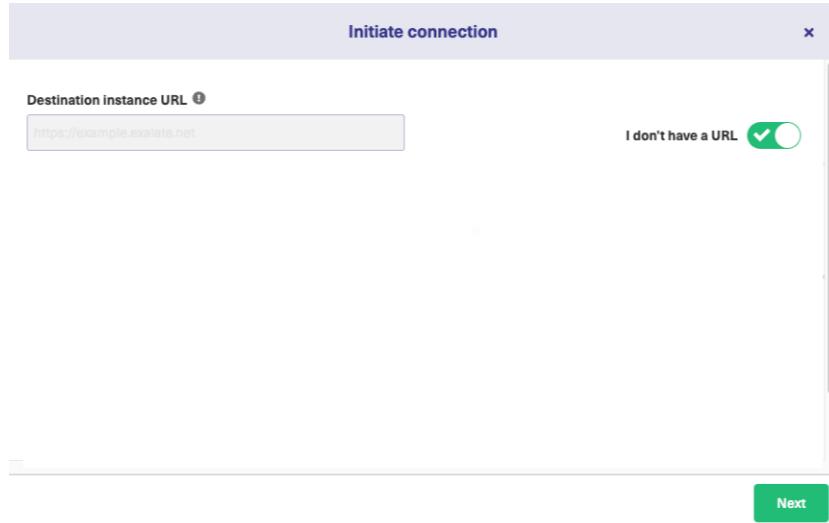
2. Click **Initiate connection**.



3. Enter the **Destination Instance URL**.

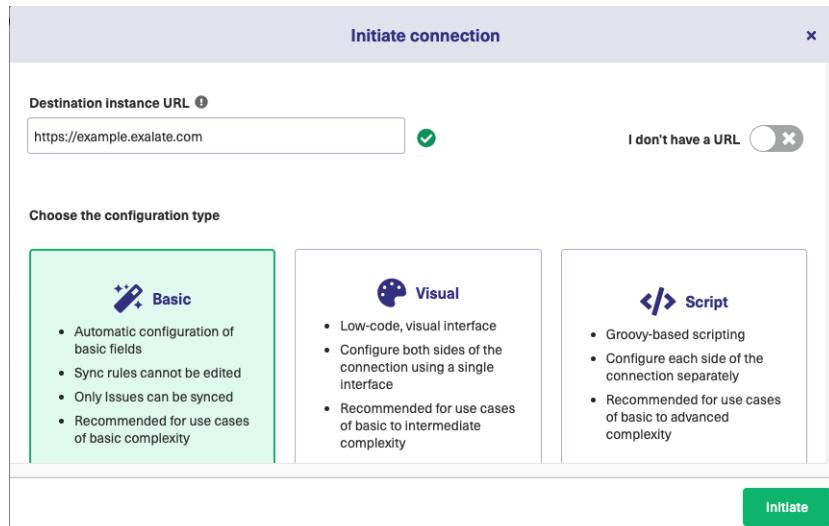
The **Destination Instance URL** is the link to the instance you want to set up a connection with. You can directly enter the link of that instance or the **Exalate URL** from the **General Settings** tab in the Exalate admin panel.

Note: If you enter the URL of your own instance here, Exalate determines it's a local connection between 2 projects within your instance.



Exalate suggests available Configuration Modes based on the destination instance.

4. Select **Basic**.



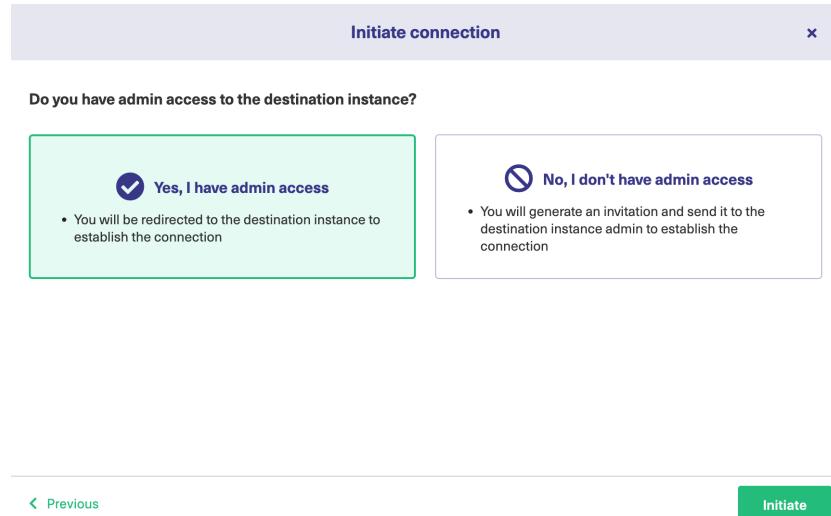
5. Click **Next**.

6. Confirm if you have admin access to the destination instance.

Further steps are different if you have or don't have admin access to the destination instance.

- Select **Yes, I have admin access** if you have admin access to the destination instance. You are redirected to the destination instance to establish a connection.

- Select **No, I don't have admin access** if you don't have admin access to the destination instance. You generate an invitation for the destination instance admin so they could establish a connection on their end.



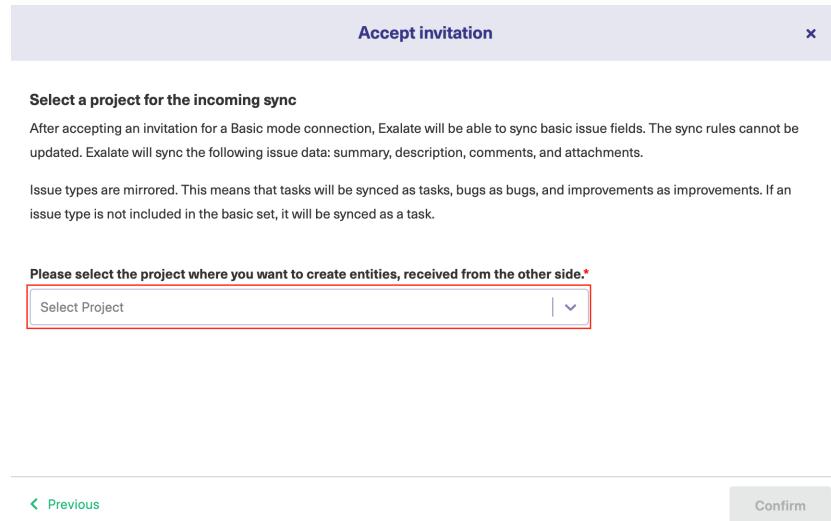
Steps for: Yes, I have Admin Access

Click **Yes, I have admin access & Initiate** the connection.

Note: You will be required to verify access on the destination instance. After that, complete the following steps on the destination instance.

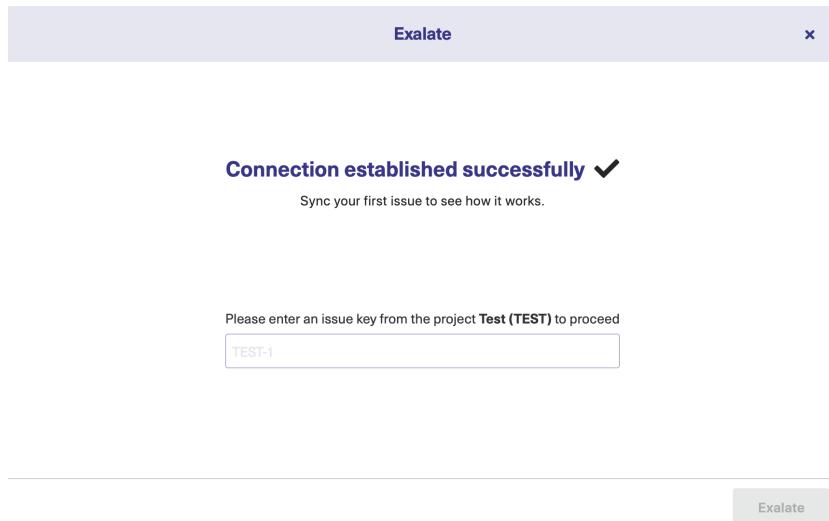
7. Select the project or repository where you want to sync entities.

Note: Selecting the project or repository is not applicable to all platforms. In this case, the Connection is established after the previous step.



8. Click **Confirm**.

The Connection has been set up.

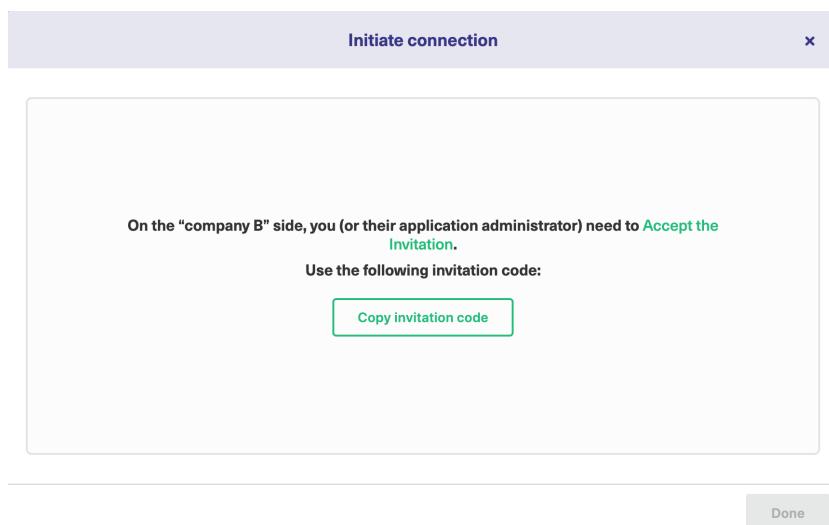


Steps for: No, I don't have Admin Access

Click **No, I have admin access & Initiate** the connection.

7. Click **Copy invitation code**.

You can send the invitation code to the destination instance admin.



8. Click **Done**.

Note: Complete the following steps on the destination instance:

9. Click on **Accept Invitation** under the **Connections** tab in the Exalate Admin Console in the destination instance and Paste the invitation code.

Accept Invitation
×

Please paste the invitation code, received from your partner

Enter the invitation code

eyJpbnZpdGF0aW9uU2VjcmV0joiNUI2SpnGckZHbGhZInVGQb1NKN3pablp0clV3MWUiLCJpbnZpdGVkSW5zdGFuY2VvWaWQoIjNmMDYwYmE2Yy0xNTg5LTQxNDUyTk2MS03MGizNWUyMjgzjQlCJub2RISW5mbly6eyJuVW1ljoibmFib28lCjYXNIVXjsjoiHROcHM6Ly9qY2xvdWRub2RILWxxZ2Ytb3Zzei14c250LXFcmEuZxhbbGF0ZS5jB91ZCIsImz3VlVHJhY2tclVybCl6mh0dHBzOi8vbmFib28uYXRsyXNzaWfUlm5dCIsI5vZGVUeXbIjjoSkisQV9DTE9RCIsImz3VlVHJhY2tclZcnNpb24iOiI3J_AuMCIsIm5vZGVbchHWZxJzaW9uljoIly4wLjAiLCjub2RIVmVyc2lvbi6jUuM4y2lwiZxhbbGF0ZBsdWdpbIzCnNpb24iOiI1LjMuMyIsIm1pbkh1Yk9iamVjdHNWZxJzaW9uljoIMs4yLjAiLCjIYXhldWJPYmpIY3RzVmVyc2lvbi6jUuM4y0liwicmF3RXhhQ29tcFzCnNpb24iOiI1LjMuNClIsImIuc3RhbmNIVWlkjioOdiIZWE2MWllyTk2M100YjdiLWl1NzUtzjE5MDRIOGU0ZDAliwiZWRpdG9yjlp7ImFkbWluUHJvb2ZVcmxUZw1wbGF0ZS16mh0dHbzOi8vbmFib28uYRsXXNzaWfUlm5ldC9sb2dpbj9yZVRpcmVjdE NvdW50XHuvMDNkMVx1MDAyNmRlc3QdXjsXHUwMDNkaHR0cHMl0EIMkYIMkZuYWVbby5hdGxh3NpYW4ubmV0JTJGcGx1Z2lucyUyRnNlc...

Next

10. Click **Next**.

11. Select the project where you want to sync issues.

Note: Selecting the project is not applicable to all platforms. In this case, the Connection is established after the previous step.

Accept invitation
×

Select a project for the incoming sync

After accepting an invitation for a Basic mode connection, Exalate will be able to sync basic issue fields. The sync rules cannot be updated. Exalate will sync the following issue data: summary, description, comments, and attachments.

Issue types are mirrored. This means that tasks will be synced as tasks, bugs as bugs, and improvements as improvements. If an issue type is not included in the basic set, it will be synced as a task.

Please select the project where you want to create entities, received from the other side.*

Select Project

◀ Previous
Confirm

12. Click **Confirm**.

The Connection has been set up.



Exalate

Start Synchronizing

You can sync your first entity in Exalate to see how it works: enter the entity URN on the previous screen and click **Exalate**.

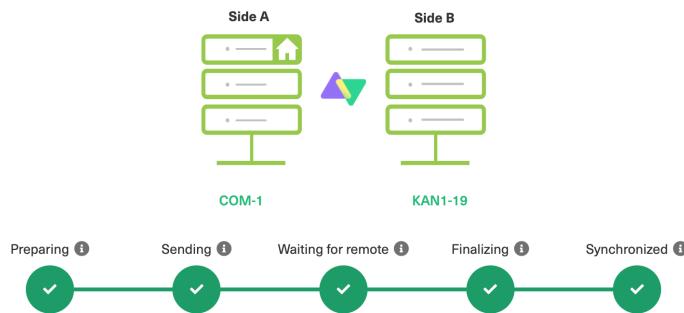


Exalate

When syncing your first entity, you see the status of your sync. The links to both entities are displayed at the bottom as shown below. You can open them up to see more details.



Congratulations!



What's Next?

Next, you can choose to

- sit back and relax while the sync works!
- [Manually synchronize entities](#).
- [Connect an entity](#).
- [Sync entities in bulk](#).
- Create a [trigger](#).

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