

Initiate a Connection in Script Mode for Salesforce

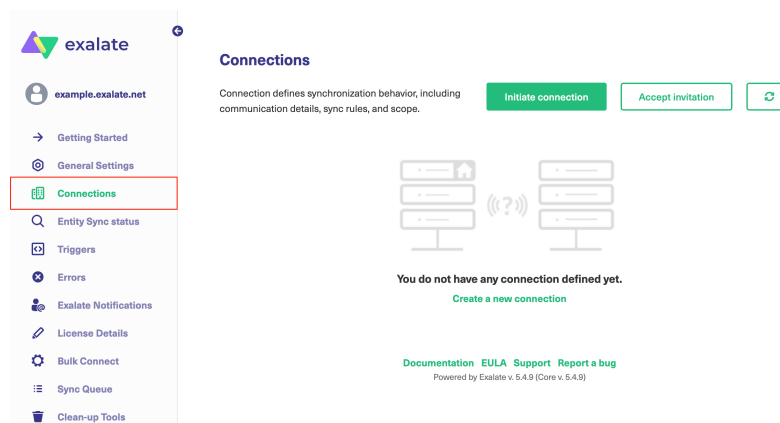
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Important: You cannot toggle between the different modes. To do so, you need to create a new Connection in Visual mode, Script mode, or Basic mode.

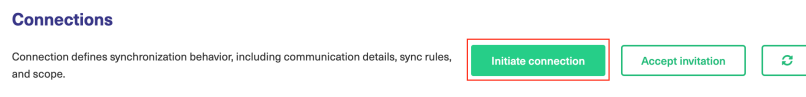
Initiate a Connection in Script Mode from Salesforce

Note: It doesn't matter which side you start initiating the Connection from. The Exalate UI remains the same. If you are initiating the connection you become the source and the other side becomes the destination.

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



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.

Initiate connection

Destination instance URL ⓘ

https://example.exalate.net

I don't have a URL ☒

Next

Exalate suggests available Configuration Modes based on the destination instance.

4. Select the Configuration Mode. In this case, **Script Mode**.


Initiate connection

Destination instance URL ⓘ


https://example.exalate.com

I don't have a URL ☐


Choose the configuration type


Basic

- Automatic configuration of basic fields
- Sync rules cannot be edited
- Only Issues can be synced
- Recommended for use cases of basic complexity


Visual

- Low-code, visual interface
- Configure both sides of the connection using a single interface
- Recommended for use cases of basic to intermediate complexity


Script

- Groovy-based scripting
- Configure each side of the connection separately
- Recommended for use cases of basic to advanced complexity

Next

5. Click **Next**.

6. Enter the Connection Information

| Field | Description |
|--|---|
| Local instance short name | A short name for your instance |
| Destination instance short name | A short name for the destination instance |
| Connection name | Name of the connection |
| Description | Description of the connection |

Initiate connection

Connection information

Source side shortname*

Destination side shortname*

Connection name*

Description

< Previous

Initiate

7. Click **Initiate**.

8. Click **Copy invitation code**.

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

Initiate connection

On the “company B” side, you (or their application administrator) need to **Accept the invitation**.

Use the following invitation code:

Copy invitation code

Done

9. Click **Go to remote** to access the destination instance.

Note: When the other side accepts your invitation your connection is activated. Refresh the **Connections** page to see the Connection status change.

What's Next?

You need to accept the Connection Invitation on the platform you want to set up an integration with. Go to the **Connections** tab in the Exalate Admin console on that platform and click the **Accept Invitation** button. Then paste the invitation code you have copied above.

Product

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