

Set up a Connection in Basic Mode for Freshdesk & Freshservice

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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.

With these connections, you can sync tickets. Ticket types are mirrored, meaning tickets in Freshdesk (or Freshservice) will be synced as tickets in the connected system.

Exalate syncs a basic set of ticket fields: summary, description, comments, and attachments.

If the entity type doesn't match on the destination instance, Exalate syncs an entity type based on the default entity type set in the destination instance.

All public and internal comments are synced as public.

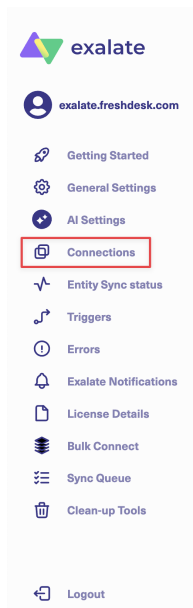
Note: You cannot modify **Sync Rules** in Basic Mode.

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

Initiate a Connection in Basic Mode from Freshdesk (or Freshservice)

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.



2. Click **Connections** → **Initiate connection**.

Connections

Connection defines synchronization behavior, including communication details, sync rules, and scope.

Initiate connection

Accept invitation



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.

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 **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 can establish a connection on their end.

Initiate connection

Do you have admin access to the destination instance?

✓

Yes, I have admin access

- You will be redirected to the destination instance to establish the connection

⊘

No, I don't have admin access

- You will generate an invitation and send it to the destination instance admin to establish the connection

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Initiate

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 does not apply 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

8. Click **Confirm**.

The Connection has been set up.

Exalate

Connection established successfully ✓

Sync your first issue to see how it works.

Please enter an issue key from the project **Test (TEST)** to proceed

TEST-1

Exalate

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**.

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

12. Click **Next**.

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

14. Click **Confirm**.

The Connection has been set up.

Exalate

Connection established successfully ✓

Sync your first issue to see how it works.

Please enter an issue key from the project **Test (TEST)** to proceed

TEST-1

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

✕

Connection established successfully ✓

Sync your first issue to see how it works.

Please enter an issue key from the project **Company (COM)** to proceed

TEST-1

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.

Exalate

✕

Congratulations!

Side A

COM-1

Side B

KAN1-19

Preparing ⓘ

Sending ⓘ

Waiting for remote ⓘ

Finalizing ⓘ

Synchronized ⓘ

When you go to the basic connection rules, you will see a sample visualization of the Basic connection rules, like this:

exalate_to_unknown

Pending

Back to Connections ✓

Publish

Upgrade

Scope

Rules

Statistics

Info

Configure the synchronization behavior with the help of field mappings and script rules.

Export all

Compare all

+ Add mapping

Order

exalate

Sync direction

unknown

1

Type

↔

Type

✓

2

Summary

↔

Summary

✓

3

Description

↔

Description

✓

4

Comments

↔

Comments

✓

Please note that these rules do not correspond to the actual sync rules on the connection. For example, the Status and Priority fields are mandatory for Freshdesk and Freshservice but are not shown in this visualization. To gain more flexibility over the synchronization, please switch to Script mode connection.

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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