

Configure the Connection in Script Mode for Asana

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Configure the Synchronization (Optional)

Set up Sync Rules

Once you test the Connection, you can choose to configure the synchronization behavior with the help of Sync Rules (Groovy-based scripts).

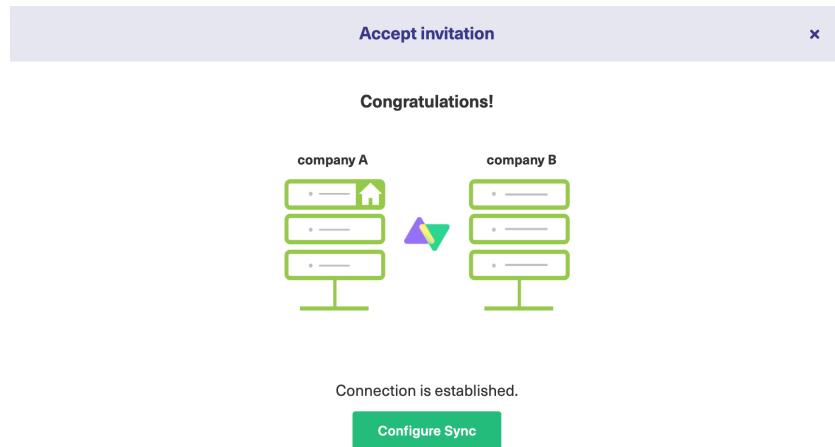
1. Edit your Connection.

There are multiple ways to edit your connection:

- Navigate to **Connections** →  **Edit connection**.

Connection	Issues under sync	Last sync	Status
 Company A to Company B Description of the connection lorem ipsum sit amet	123	Issue TEST-777 46 minutes ago	Active   

- If you just created a connection, select **Configure sync**.



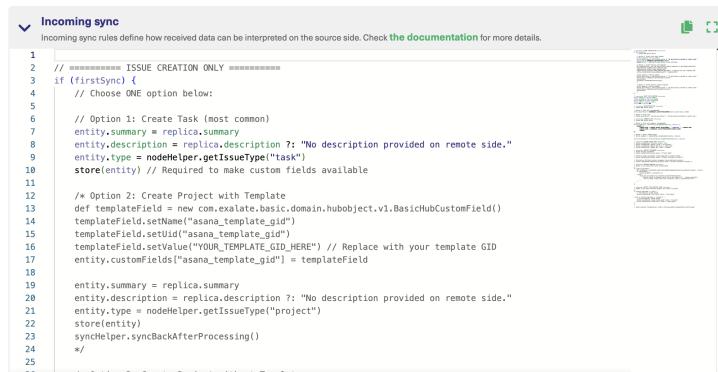
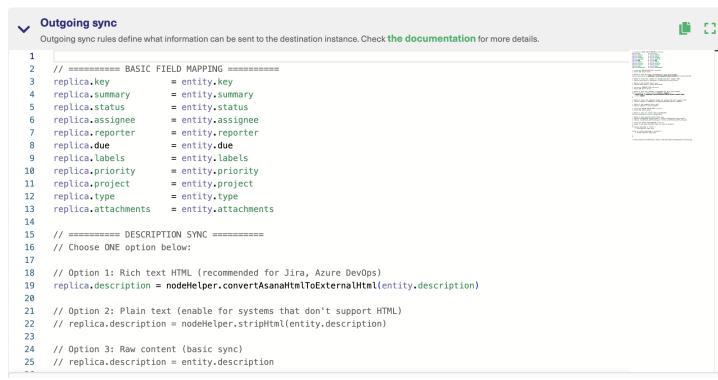
2. Set up **Outgoing sync** and **Incoming sync** in the **Rules** tab.

Note: Outgoing sync and Incoming sync scripts:

- are generated by default once the connection has been set up. You can, however, add, edit or remove these scripts to configure your sync according to your requirements.
- are platform specific.
- are present at both the source and the destination instance to give independent control over what data needs to be sent or received.

In the **Outgoing sync**, you can enter scripts to specify what data you will send.

In the **Incoming sync**, you can enter scripts to specify what data you will receive.



The Outgoing sync configuration screen displays a code editor with the following script:

```
1 // ===== BASIC FIELD MAPPING =====
2 replica.key = entity.key
3 replica.summary = entity.summary
4 replica.status = entity.status
5 replica.assignee = entity.assignee
6 replica.reporter = entity.reporter
7 replica.due = entity.due
8 replica.labels = entity.labels
9 replica.priority = entity.priority
10 replica.project = entity.project
11 replica.type = entity.type
12 replica.attachments = entity.attachments
13
14 // ===== DESCRIPTION SYNC =====
15 // Choose ONE option below:
16
17 // Option 1: Rich text HTML (recommended for Jira, Azure DevOps)
18 replica.description = nodeHelper.convertAsanHTMLtoExternalHTML(entity.description)
19
20 // Option 2: Plain text (enable for systems that don't support HTML)
21 // replica.description = nodeHelper.stripHTML(entity.description)
22
23 // Option 3: Raw content (basic sync)
24 // replica.description = entity.description
25
```

The Incoming sync configuration screen displays a code editor with the following script:

```
1 // ===== ISSUE CREATION ONLY =====
2 if (firstSync) {
3   // Choose ONE option below:
4
5   // Option 1: Create Task (most Common)
6   entity.summary = replica.summary
7   entity.description = replica.description ?: "No description provided on remote side."
8   entity.type = nodeHelper.getIssueType("task")
9   store(entity) // Required to make custom fields available
10
11   /* Option 2: Create Project with Template
12   def templateField = new com.exalate.basic.domain.hubobject.v1.BasicHubCustomField()
13   templateField.setName("asana_template_gid")
14   templateField.setUUID("asana_template_gid")
15   templateField.setValue("YOUR TEMPLATE_GID_HERE") // Replace with your template GID
16   entity.customFields["asana_template_gid"] = templateField
17
18   entity.summary = replica.summary
19   entity.description = replica.description ?: "No description provided on remote side."
20   entity.type = nodeHelper.getIssueType("project")
21   store(entity)
22   syncHelper.syncBackAfterProcessing()
23
24 */
25
```

Automate your Synchronization through Triggers

Specify **Triggers** if necessary.

With triggers, you can set up automatic sync of entities that fit a specific search query.

You can create **Triggers** by editing the connection or by configuring the sync as shown in the previous step. You can also create them on the Exalate Admin Console under the **Triggers** tab.

Note: For more information, check out [How to create a trigger](#).

Publish the changes made to the Connection

Click **Publish** to save a connection.

You can also use these hotkeys to publish a connection:

- **Ctrl + S** on Windows or Linux
- **Cmd + S** on Mac

Note: Changes in existing connections are not applied until you update the entity. Please make sure to update the entity if you want to apply changes.

What's Next?

Well done! You have successfully completed your "Getting Started" journey. But there's more.

Options you can consider next:

- Sit back and relax! Sync will happen based on the Sync Rules and Triggers you have set up in this step.
- You can also check out the [Configuration Guides](#) to see more synchronization examples.
- You can also check out the [Exalate API Reference Documentation](#) to learn more about how to work with incoming and outgoing sync scripts (aka Sync Rules).

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