

How to upgrade a Basic connection?

Last Modified on 01/15/2026 2:27 pm EST

As it is not possible to update the Sync Rules in Basic Connections, you need to upgrade it to a Script or, if applicable, a Visual configuration mode.

How to Upgrade a Basic Connection to a Visual Configuration Mode

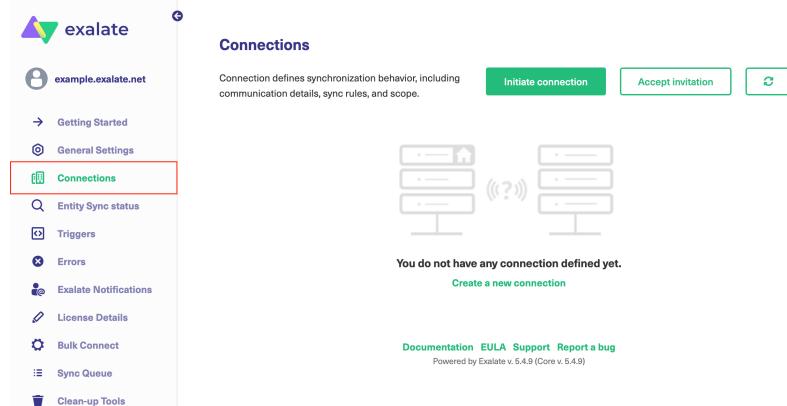
Note: You can upgrade a Basic connection to a Visual configuration mode for Jira Cloud, Jira On-premise, Azure DevOps, or Zendesk.

Note: Before upgrading a Basic connection to the Visual mode ensure that:

- you have admin access to the destination instance.
- you are either in the Evaluation (trial) period or have a Paid license.

To upgrade a Basic connection to the Visual configuration mode:

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



2. Click the **Edit Connection** button.

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	

3. Click the **Upgrade** button.



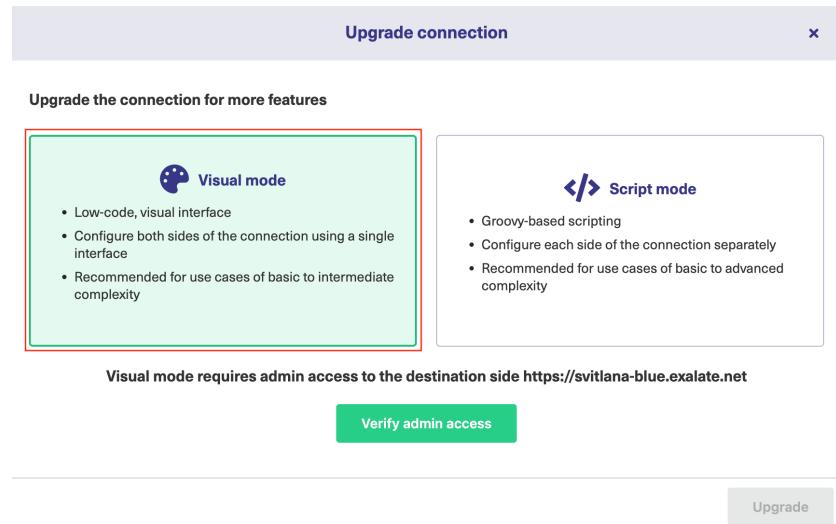
Company A_to_company B
Active

Back to Connections ✓ Publish Upgrade

Scope Rules Statistics Info

Define the context for the synchronization: what issues you want to sync and how to start the synchronization process.
Using Basic connection, you can only sync **Issues**.

4. Select **Visual mode**.



Upgrade connection

Upgrade the connection for more features

Visual mode

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

Script mode

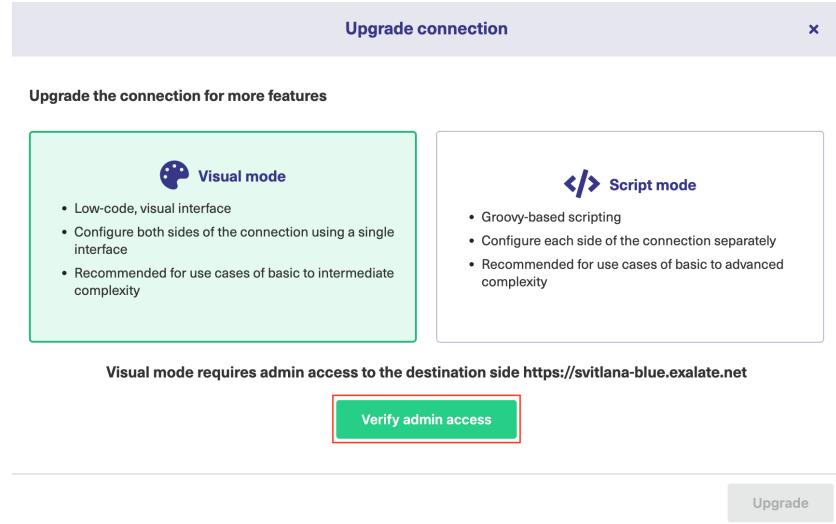
- Groovy-based scripting
- Configure each side of the connection separately
- Recommended for use cases of basic to advanced complexity

Visual mode requires admin access to the destination side <https://svitlana-blue.exalate.net>

Verify admin access

Upgrade

5. Click the **Verify admin access** button.



Upgrade connection

Upgrade the connection for more features

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Visual mode requires admin access to the destination side <https://svitlana-blue.exalate.net>

Verify admin access

Upgrade

You see a pop-up window within the remote instance. Click the **Accept** button to finish the verification process.

Note: Make sure your browser or any additional application is not blocking pop-ups.



Exalate wants to set up a connection between
<https://qayuratest001.atlassian.net> and <https://svitlana-blue.exalate.net>

<https://svitlana-blue.exalate.net> will be able to access the following data on
<https://qayuratest001.atlassian.net>:

- Issues (including descriptions, attachments, and comments)
- Other entities available for **Mariana**

If you trust <https://svitlana-blue.exalate.net>, press Accept.

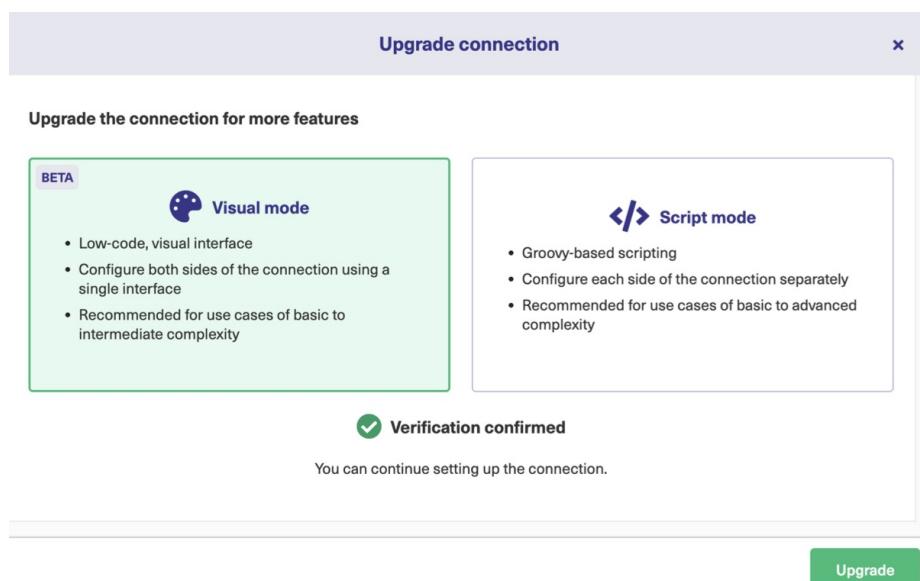
Decline

Accept

➤ Safe check details

6. Click the **Upgrade** button.

Once the verification is confirmed you can upgrade the connection.



Now that the connection has been upgraded to the Visual configuration mode, you can edit the sync rules.

How to Upgrade a Basic Connection to a Script Configuration Mode

Note: Before upgrading a Basic connection to the Script mode ensure that:

- you are either in the Evaluation (trial) period or have a Paid license.
- in case of a Private-to-Public connection, the upgrade is performed from the Private side.

To upgrade a Basic connection to Script:

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

2. Find the connection that you want to upgrade in the list of connections and click **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

3. Click the **Upgrade** button.

4. Select **Script mode**.

Note: In case your platform doesn't support Visual mode configuration, you see the Script mode block only.

Upgrade the connection for more features

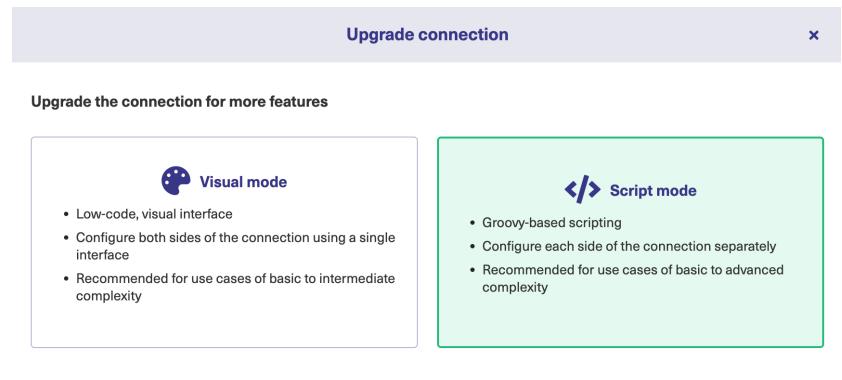
Visual mode

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

Script mode

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

5. Click the **Upgrade** button.



Now when the connection has been upgraded to the Script configuration mode, you can edit the sync rules.

ON THIS PAGE

Product

[About Us](#)  [How to Upgrade a Basic Connection to a Visual Configuration Mode](#)
[Release History](#)  [Glossary](#) 
[How to Upgrade a Basic Connection to a Script](#)
[API Reference](#) 
[Configuration Mode](#) 

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