



## Launching Exalate for the World's Leading CRM: Exalate for Salesforce is here!



## Table of contents

- Don't Leave Your Favorite Tool
- Close the Gap between Your Teams
- Invest Your Time in What Matters Most
- What does Exalate for Salesforce Offer?
- Get Started



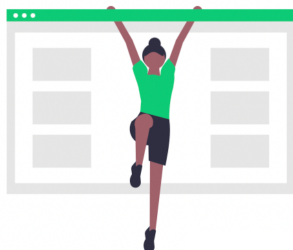
Salesforce is a one-stop destination for the complete sales workflow right from generating leads to providing after-sales support, all through a single interface. It also offers a high level of flexibility, is easy to manage, and comes with a variety of best-in-class apps.

<https://youtu.be/vYg4GBVDiBk>

There's no doubt then that Salesforce is the world's no.1 CRM tool. And now with Exalate's newest [Salesforce integration](#), we bring the power of this tool to help you close the gaps between your sales, support, and product teams. And you can start it for free with the Exalate Free Plan today.

## Don't Leave Your Favorite Tool NO GRAPH

Jira, GitHub, Zendesk, ServiceNow, Azure DevOps, ... are some popular tools that are used by many teams worldwide for a variety of purposes: customer support, software development, project management, service management, DevOps, and the like.



With Exalate's Salesforce integrations, you can now enjoy the comfort of your favorite tool, work in an environment you are familiar with, and still experience a smooth integration with your CRM.

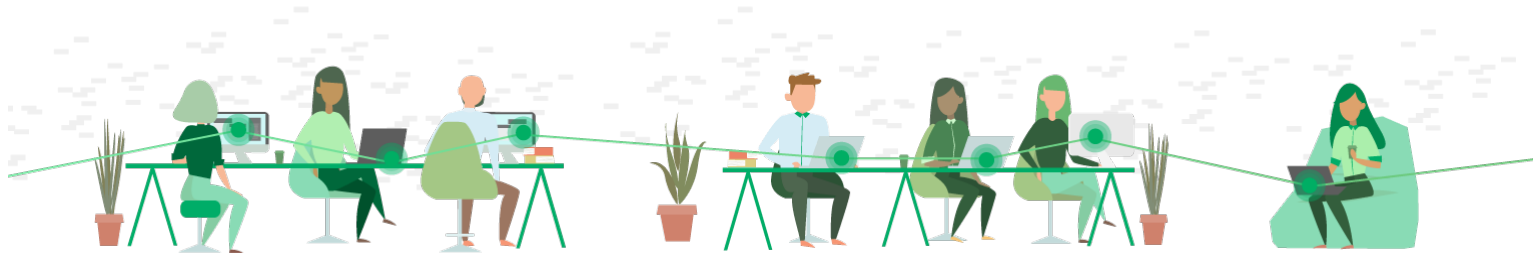
## Close the Gap between Your Teams NO BARRIER

Modern sales teams no longer work in silos. They need to quickly find experts who can help them close deals faster.

See your business and revenue-driving data flow seamlessly between these different tools in a unified manner through a single interface.

They also often have to make a collaborative effort to engage with different teams like:

- customer support agents, to resolve tickets faster
- developers, to ensure product updates or bug fixes are implemented and communicated in a timely manner
- customer success representatives, to maintain a low churn
- back-office, to ensure licensing or contracts are generated and maintained effectively
- marketing, to drive personalized customer campaigns



To get the right information from the right people, sales often has to resort to endless meetings, phone calls, emails, or simply toggle between different applications for copy-pasting.

This leads to delays, manual data-entry errors, discrepancies in information, a waste of time and effort, and ultimately drives down customer satisfaction and revenues.

Exalate's Salesforce integration helps your sales team make the transition from switching between applications for information to envisioning a single source of truth in Salesforce.

Such integration can help them get all the information they need without having to leave Salesforce. At the same time, it enables them to get real-time, automatic updates from other teams inside their Salesforce environment. This promotes data transparency and ensures everyone stays on the same page.

## Invest Your Time in What Matters Most NO BUNNY

Time is of the essence! This is especially true for sales teams since a delay in closing deals can lead to revenue and business loss.

So instead of going through the pain of getting the information you need through mundane, unnecessary manual tasks, increase efficiency and productivity by focusing on what's important. Collaborate with other teams for critical tasks and spend time resolving key issues.

With Exalate's automatic, real-time, two-way synchronization, you can:

- connect your Zendesk or ServiceNow with Salesforce and get updates on support tickets or incidents of key Opportunities without having to track them through endless phone calls and emails.



- allow your customer success teams to have a complete customer overview from Account, Case, and Opportunity in Salesforce to ensure they maintain a low churn and deliver a consistent customer experience.
- bridge the gap between your development team using Github, Jira, or Azure DevOps and your sales team by:
  - enabling the sales team to escalate bugs and feature requests right from within Salesforce.
  - tracking issues or work items straight from Salesforce.
  - getting product updates directly into Salesforce.
- allow stakeholders using project management tools like Jira to sync Opportunities in Salesforce with back-office tasks like managing licenses and contracts and tracking deal progress.

## What does Exalate for Salesforce Offer?

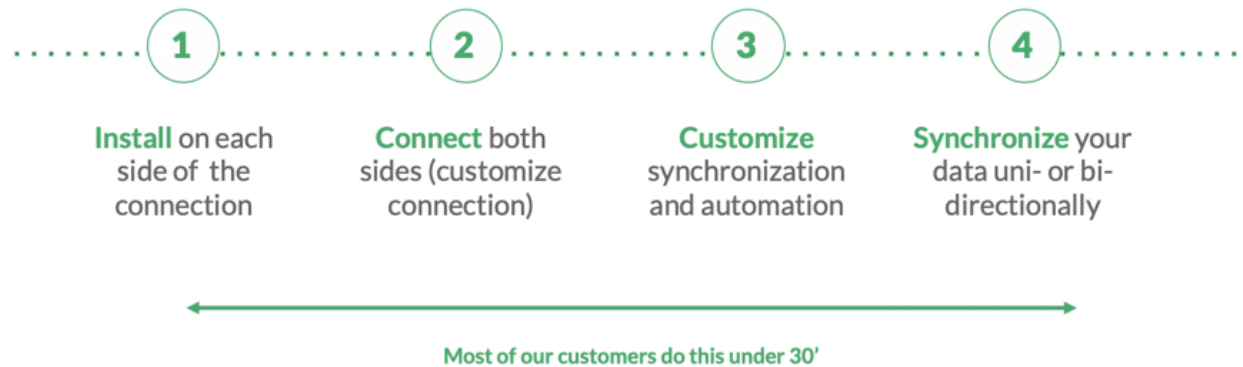
1. A **holistic view of information** to revenue-owning teams by bi-directionally syncing Salesforce objects with Jira, Github, Zendesk, Azure DevOps, ServiceNow, or HP ALM. The most popular ones that can be synced are **Task, Case, Account, Product, and Opportunity**.
2. **Flexibility** by not being confined to inflexible UI. The integration comes in 2 configuration modes:



- Basic mode, a low-code, no configuration UI that allows basic synchronization scenarios straight out of the box. With this mode, you get up to 1000 syncs per month for free.
- Script mode with advanced scripting options for extended customizability; suitable for complex integration cases.

3. **5-minute** (or less) **sync** set-up

## How to get started



3. Maximizing business agility due to **decentralized integration**. So each side of the synchronization can control what information is sent to the other side and how incoming information is interpreted, without having to worry about configuring the other side.

### Congratulations!



Connection is established.

[Configure Sync](#)

- 5. A **Free Plan** allowing you to experience Exalate firsthand with up to 1000 free syncs per month. It comes with the Basic mode only and is suitable for simple synchronization use cases.



## Get Started

You can get Exalate for Salesforce on the [Salesforce AppExchange](#).