How to Configure Sync Panel Viewing Permissions Using Component Filters

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SALESFORCE

This article describes how to configure Sync Panel component viewing permissions on a Salesforce object view, using the component's advanced filters.

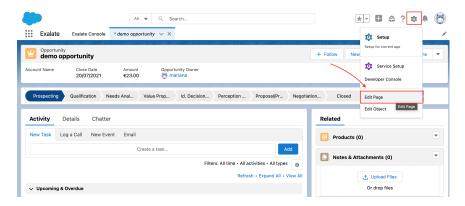
You might need to configure viewing permissions if the Exalate app has been installed for the Admins only. In this case, the users will not be able to use Exalate but the Sync Panel will still be visible to them, showing up the error message.

To avoid such situations, you can configure viewing permission for the Exalate Sync Panel component and hide it from specific groups of users.

1. Open a Salesforce object with the Exalate Sync Panel component on

If you have not added a Sync Panel to any object yet, check out How to add a Sync panel to Salesforce first.

2. Click Setup icon > Edit page



You will be redirected to the Lighting App builder where you can manage the look of the certain object page by adding or removing components.

3. Click anywhere on the Exalate component area

Opportuni demo d	ity opportunity							+ Follow	New Case	New Note	Clone 🔻
Account Name	Close Date 20/07/2021	Amount €23.00	Opportunity O Mariana	lwner		- 410 3 41			110 1 1		
Prospecting	Qualification	Needs Analysis	Value Propositi			Proposal/Price			losed	✓ Mark Stag	
Activity	Details Chatte						Б	alate	0		± 1
New Task	Log a Call New Even		Create a task			Add		1	Status: NOT SYN	Connect	
				F	ilters: All time • All ac				0		
					Refres	Expand All View	All Re	lated			

4. Click Add Filter on the right sidebar

	Analyze 🛕 Activation Save
	Page > Exalate
+ Follow New Case New Note Clone	 Set Component Visibility Filters + Add Filter
Exalate Status: NOT SYNCHRONIZED Exalate Connect Related	

Here you can add as many filters as you need to configure the component.

5. In the New Filter panel click **Advanced**

* Filter Type			Pag	e > Exalate	
Record Field	Device	Advanced	~	Set Component Visib	ility
Field			Filt	ers	
Select				New Filter	×
* Operator					
		Q		+ Add Filter	
Value					
		Done			

6. Click the **Select** button

*Filter Type				Page	> Exalate	
Record Field	Device	Advanced		~	Set Component Visibi	lity
* Field				Filte	ers	
* Operator				1	New Filter	×
			Q		+ Add Filter	
Value						
		Γ	Done	J		

7. Select a field type **User**

Select field

Select a field type, then a field. Labels followed by a ">" indicate that there are more fields available.

User	•
Device	>
User	>
Permissions	>
Record	>

8. Select Profile

Select field

Select a field type, then a field. Labels followed by a ">" indicate that there are more fields available.

User 🕨	Profile	•
	Nickname	
	Phone	
	Profile	>
	Role	>
	SAML Federation ID	
	Start of Day	
	State/Province	
	Street	

9. Select Name

Select field

Select a field type, then a field. Labels followed by a ">" indicate that there are more fields available.

User 🕨 Profile 🕨	Name	•
	Created By	>
	Description	
	Last Modified By	>
	License Type	
	Name	
	Usage Type	
	User Type	

10. Review your selection and click **Done**

fields available.	pe, then a field. Labels followed by a ">" indicate that there are	more
Jser 🕨 Profile	e 🕨 Name	
	Field Label	
	Name	
	Field Type	
	Text	
	API Name	
	Name	

11. In the **Operator** field choose **Contains**

* Filter Type				Page	e > Exalate	
Record Field	Device	Advanced				
* Field					Set Component Visi	bility
User > Profile > N	lameX		/	Filte	ers	
* Operator		/		1	New Filter	×
Contains		<u> </u>	Q		+ Add Filter	
✓ Contains					+ Add Filter	
Equal						
Not Equal						

Done

12. In the Value field type System Administrator

* Filter Type				Page	> Exalate
Record Field	Device	Advanced		~	Set Component Visibility
* Field User > Profile > N	lamoY			Filte	
*Operator	Iditie			1	User > Profile > Name Contains × System Administrator
Contains			×		
* Value					+ Add Filter
System Adminis	trator				
		De	one		

13. Click Done

14. Click a **Save** button on the top right corner of the page

	Analyze A Activation Save
+ Follow New Case New Note Clone V	Page > Exalate
M Perception Ana Proposal/Price_ Negotiation/Re_ Closed	✓ Set Component Visibility Filters
M / Perception Ana / Proposeprine / Regional on fine Closed V Mark Stagle as Compare	1 User > Profile > Name Contains × System Administrator
Addi Filters: All time - All activities - All types & Refresh - Expand All - View All	+ Add Filter

Product The Sync panel on this specific object type will now be only visible to the System administrators.

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