

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.

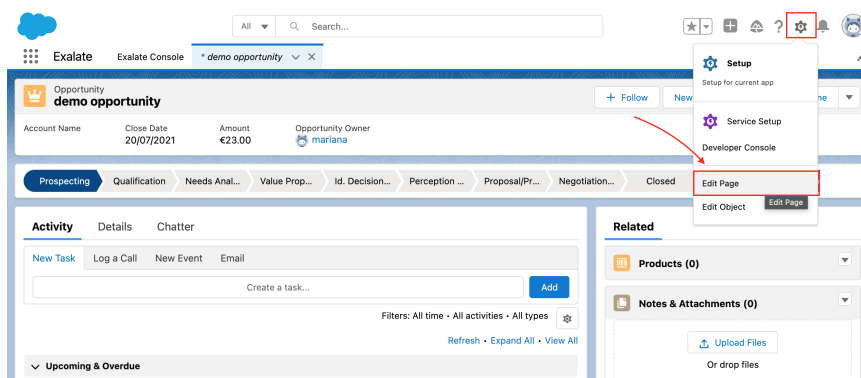
You might need to configure viewing permissions if the Exalate app has been installed for the Admins only. In this case, the users will not be able to use Exalate but the Sync Panel will still be visible to them, showing up the error message.

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

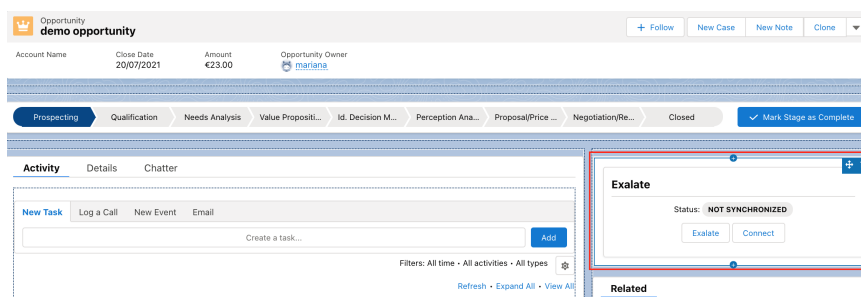
If you have not added a Sync Panel to any object yet, check out [How to add a Sync panel to Salesforce](#) first.

2. Click Setup icon > Edit page

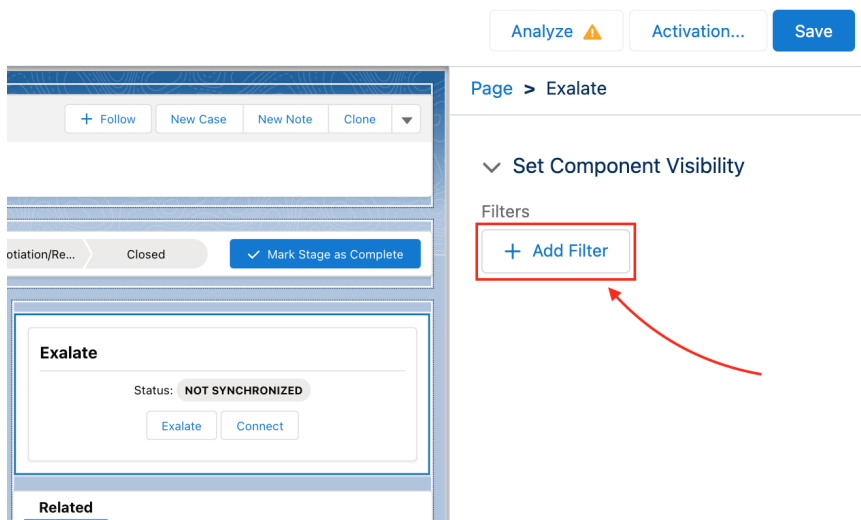


You will be redirected to the Lightning App builder where you can manage the look of the certain object page by adding or removing components.

3. Click anywhere on the Exalate component area

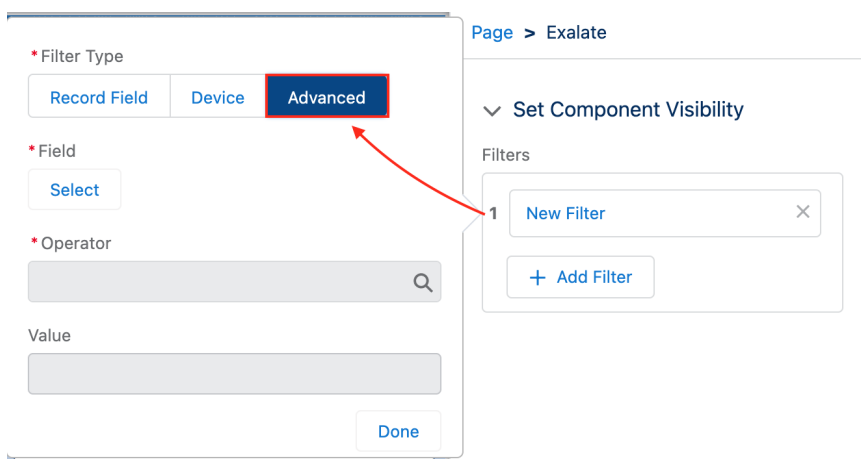


4. Click **Add Filter** on the right sidebar

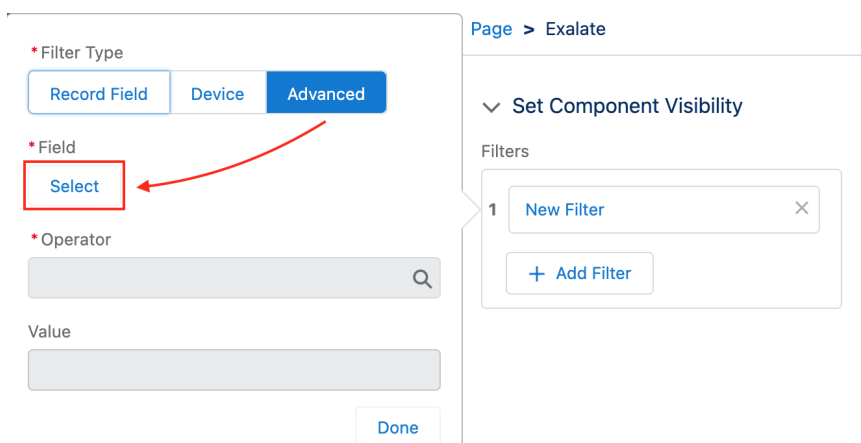


Here you can add as many filters as you need to configure the component.

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



6. Click the **Select** button



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

Profile

>

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**

Select field

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

User ► Profile ► Name

Field Label
Name
Field Type
Text
API Name
Name

Cancel

Done

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

* Filter Type

Record Field Device **Advanced**

* Field

User > Profile > NameX

* Operator

Contains

✓ Contains

Equal

Not Equal

Page > Exalate

Set Component Visibility

Filters

1 New Filter X

+ Add Filter

12. In the **Value** field type **System Administrator**

* Filter Type

Record Field Device **Advanced**

* Field

User > Profile > NameX

* Operator

Contains X

* Value

System Administrator

Done

Page > Exalate

Set Component Visibility

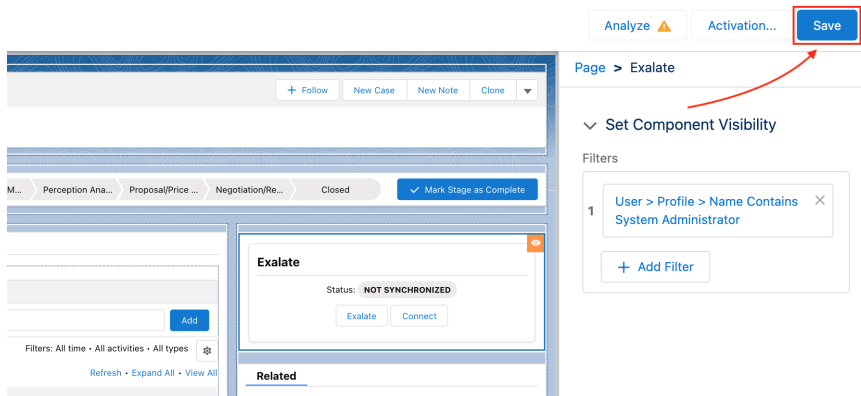
Filters

1 User > Profile > Name Contains System Administrator X

+ Add Filter

13. Click **Done**

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



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

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