How to Add a Sync Panel to Salesforce
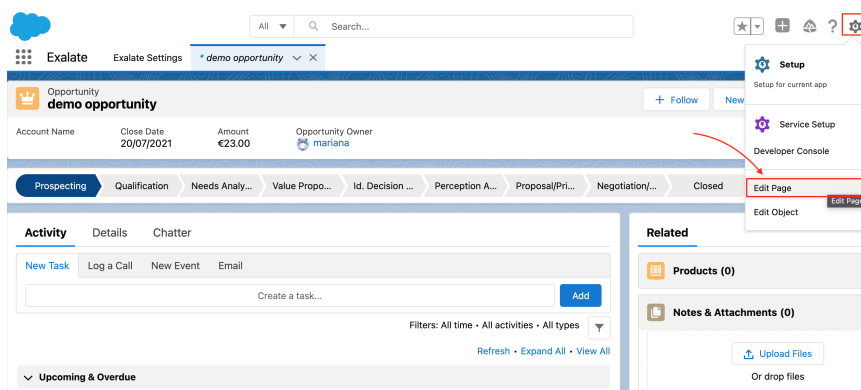
This article describes how to add a Sync Panel to a Salesforce object.

> **Note**: The Exalate Sync Panel for Salesforce is only provided if you have downloaded the Exalate Bridge App from Salesforce AppExchange and installed it on your Salesforce organization.
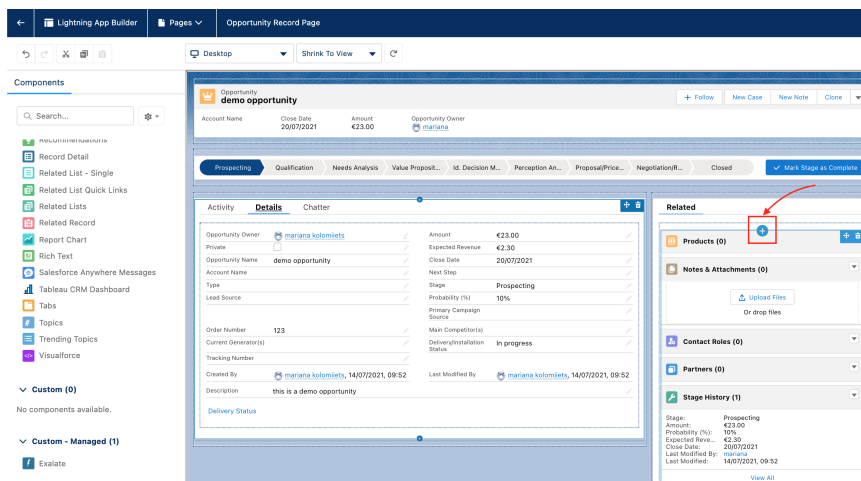
Add the Sync Panel to a Salesforce object.

1. Create a new object or open an existing one
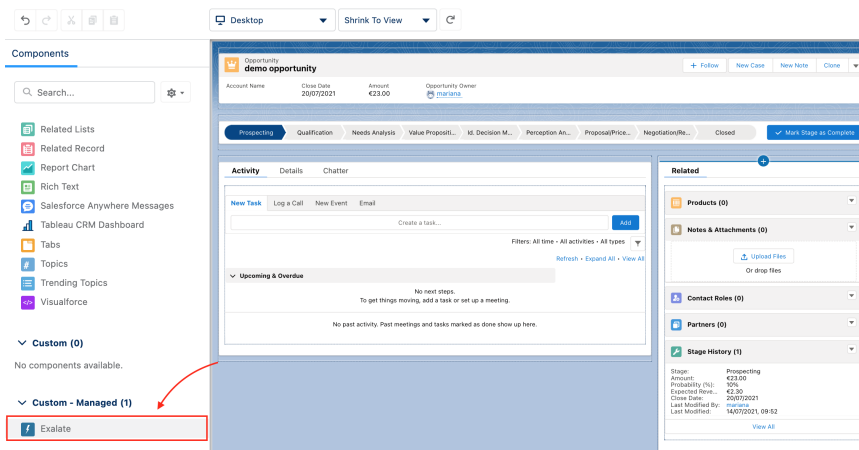
2. Click Setup icon -> Edit page

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.

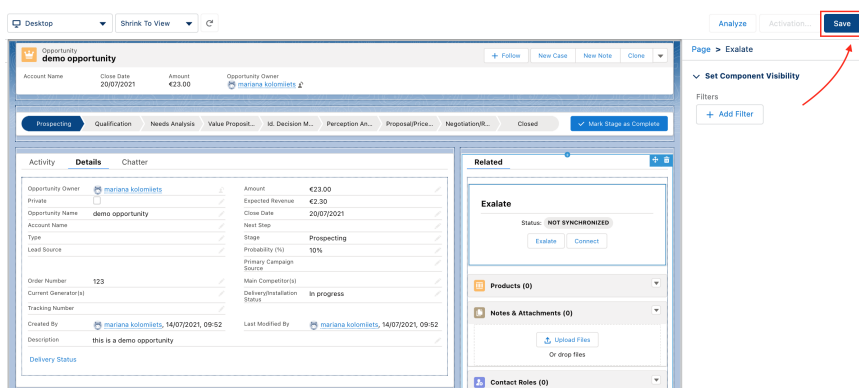3. Click + to add a Sync panel to the selected area

4. Select **Exalate** in Components -> Custom - Managed

You can also add **Exalate** to the page by simply dragging it from the left side panel to any required place in the builder area.
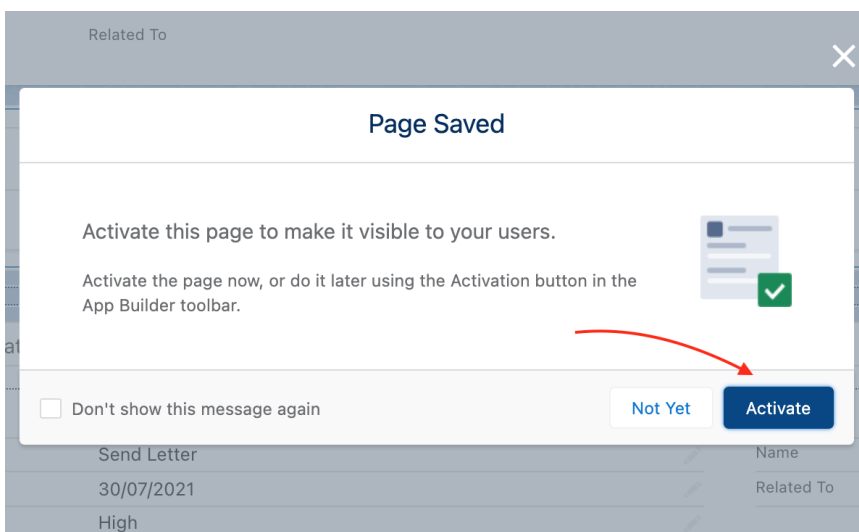

You can add different filters to the component, for example, to configure view permissions. It might be useful if the Exalate has been installed for Admins only. Check out How to configure Sync Panel viewing permissions using component filters.

5. Click **Save** once the Exalate panel is in place

6. Click **Activate** to make the changes visible

7. Select the **App Default** tab and click **Assign as App Default**

Activation: Task Record Page

Custom record pages can be assigned at different levels:

🌐 **The org default** record page displays for an object unless more specific assignments are made.

⚡ **App default** page assignment, if specified, overrides the org default.

📋 **App, record type, profile** assignments override org and app defaults.

Learn more about Lightning page assignment.

ORG DEFAULT	**APP DEFAULT**	APP, RECORD TYPE, AND PROFI...

Set this page as the default for Task records for specific Lightning apps. An app default page displays for all the object's records in an app unless specific app, record type, and profile assignments are made.

Assign as App Default

Close

8. Select **Exalate** and click **Next**

Select Apps

Select the Lightning apps to display "Task Record Page" as the app default page.

Lightning Apps (9)

	App Name	Description
☑	Exalate	
☐	Lightning Scheduler Setup	Set up personalized appointment scheduling.
☐	LightningBolt	Discover and manage business solutions designed for your indus...
☐	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience
☐	Queue Management	Create and manage queues for your business.
☐	Sales	Manage your sales process with accounts, leads, opportunities, a...

Cancel   Back   Next

9. Select **Desktop and phone** and click **Next**

Select Form Factor

For each app that you assigned this page to as the app default, select the form factor that you want the page to apply to. For example, if you select only the Phone option, then this page will be the app default page for this app only when viewed on a mobile device.

Lightning Apps (1)

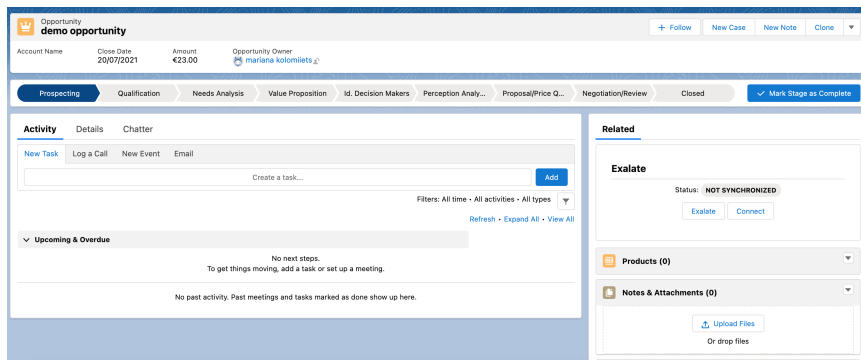| App Name	FORM FACTOR
Exalate	⦿ Desktop and phone ○ Desktop ○ Phone

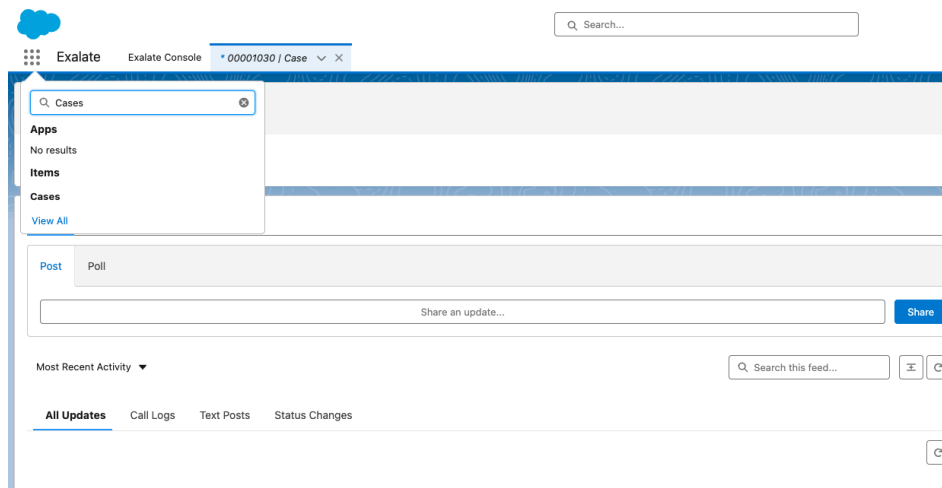Cancel   Back   Next

10. Review assignments and click **Save**

Congratulations. The Sync panel has been added to an object view.

How to access the Sync Panel

1. Access the Exalate app from the search bar.

2. Open **Cases** (can be any other entity for which Sync Panel is added).

3. Select any case.

If you want to see the Sync Panel in any app, such as Services, or Sales:

1. Select the **Org Default** tab and click **Assign as Org Default:**

2. Select **Desktop and Phone** and click **Next**:

Assign form factor

Select the form factors that you want your org default page to be available for.

- ○ Desktop
- ○ Phone
- ● Desktop and phone

Cancel   Back   Next

1. Review the assignments and click **Save**:

Review assignment

Review Assignments (2)

Form Factor	Current Org Default	New Org Default
Desktop	System Default	Case Record Page
Phone	System Default	Case Record Page

Product

Cancel   Back   Save

Have more questions? Ask the community

Resources

Still need help?