How to Configure Sync Panel Viewing Permissions Using Component Filters

SALESFORCE

This article describes how to configure Sync Panel component viewing permissions on a Salesforce object view, using the component's advanced filters.
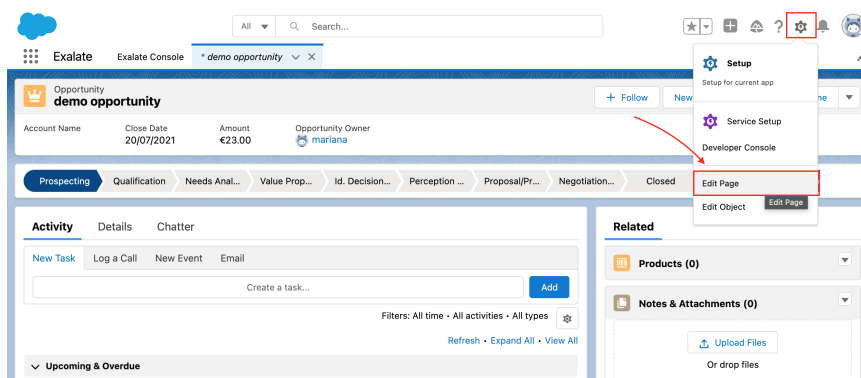
You might need to configure viewing permissions if the Exalate app has been installed for the Admins only. In this case, the users will not be able to use Exalate but the Sync Panel will still be visible to them, showing up the error message.

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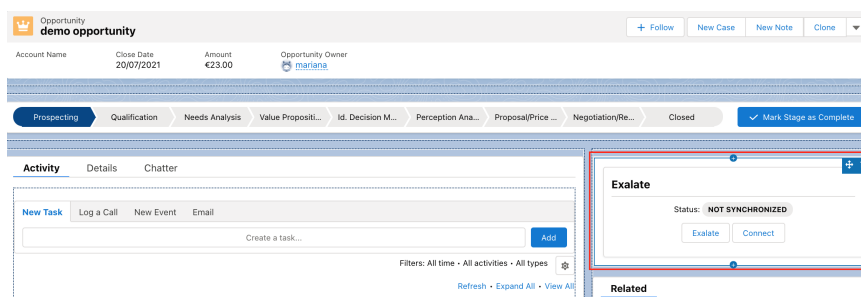
If you have not added a Sync Panel to any object yet, check out How to add a Sync panel to Salesforce first.

2. Click Setup icon > Edit page

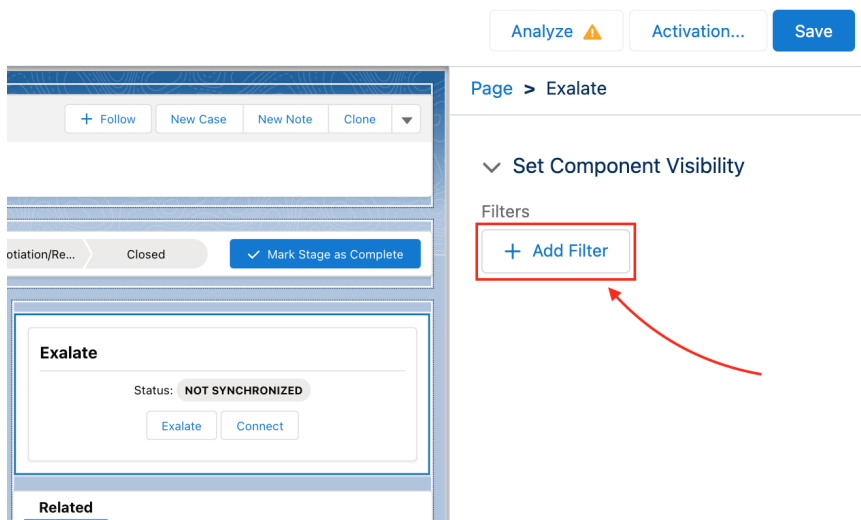You will be redirected to the Lighting App builder where you can manage the look of the certain object page by adding or removing components.
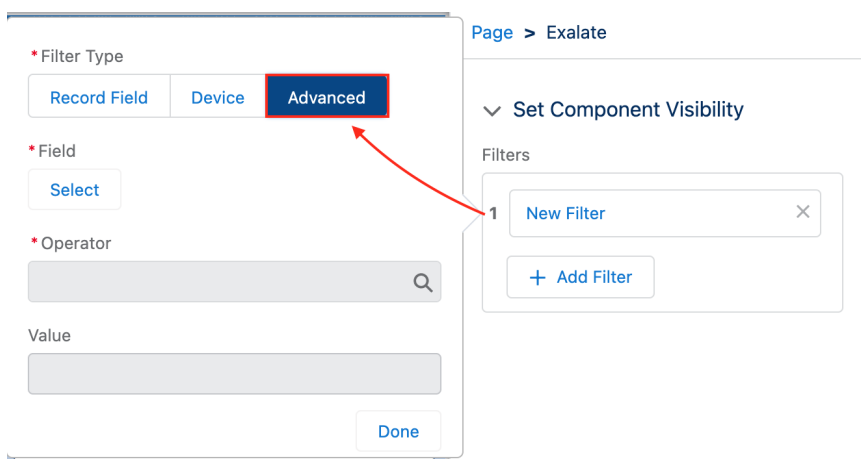
3. Click anywhere on the Exalate component area

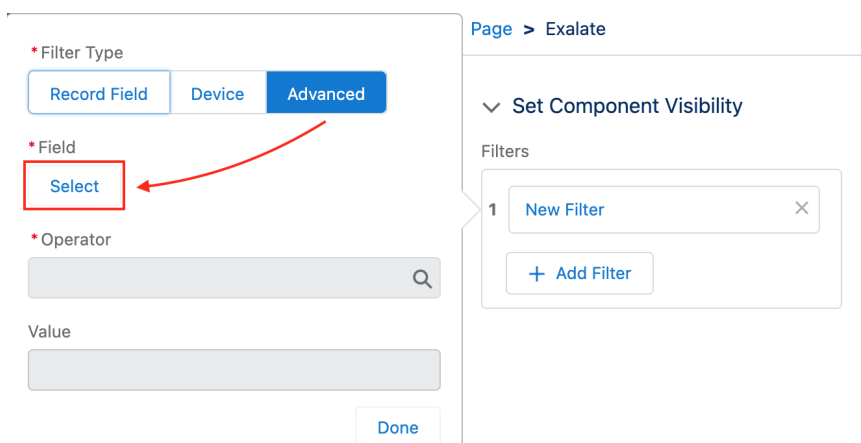4. Click **Add Filter** on the right sidebar

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	>
SAML Federation ID	
Start of Day	
State/Province	
Street	

Profile

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 > Name ✕

* Operator

Contains   🔍

✓ **Contains**

Equal

Not Equal

Page > Exalate

⌄ Set Component Visibility

Filters

1   New Filter   ✕

＋ Add Filter

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

* Filter Type

Record Field   Device   **Advanced**

* Field

User > Profile > Name ✕

* Operator

Contains   ✕

* Value

System Administrator

Done

Page > Exalate
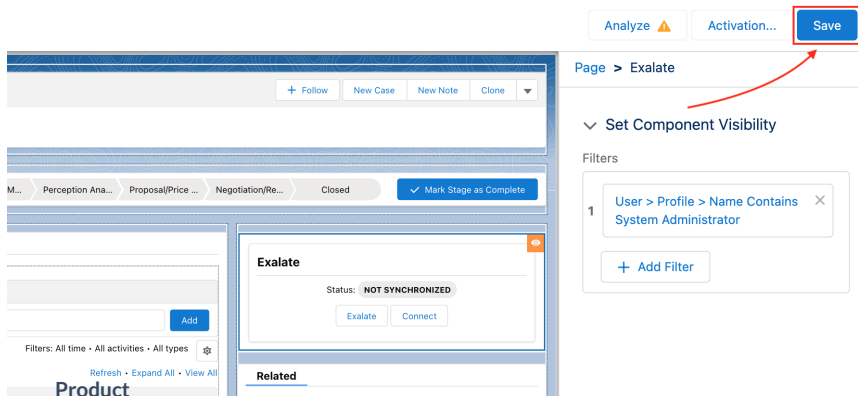
⌄ Set Component Visibility

Filters

1   User > Profile > Name Contains   ✕
     System Administrator

＋ 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.

Have more questions? Ask the community