

How to Add a Sync Panel to Salesforce

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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 Lightning 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**
8. Select **Exalate** and click **Next**
9. Select **Desktop and phone** and click **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:**

Product

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

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