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

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✓ Upcoming &	Overdue									Or drop files

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

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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.

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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

demo oppo	ortunity			+ Follow New Case New Note Clone 💌	Page > Exalate
count Name	Close Date Amount 20/07/2021 €23.00	Opportunity Owner	0		✓ Set Component Visibility
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6. Click **Activate** to make the changes visible

	Related To		×
	Page Saved		
a	Activate this page to make it visible to your us Activate the page now, or do it later using the Activatic App Builder toolbar.		
	Don't show this message again	Not Yet	Activate
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	30/07/2021		Related To
	High		

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

Activation: Task Record Page

		ecified, overrides the org default.
	p, record type, profile assighting page assignment.	ignments override org and app defaults.
DRG DEFAULT	APP DEFAULT	APP, RECORD TYPE, AND PROFI
		becific Lightning apps. An app default page displays for all the object's records in an app un
	e, and profile assignments	are made.
Assign as App Defau	lt	

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

s	elect 1	the Lightning apps to display "Task Record Page" as the app def	ault page.
	Ligh	ntning 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
			_
С	ancel		Back Next

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

	Select Form Factor	
	this page to as the app default, select the form factor that you want the page to apply to. For examp en this page will be the app default page for this app only when viewed on a mobile device.	ole, if you
Lightning Apps (1)		
App Name	FORM FACTOR	
Exalate	Desktop and phone O Desktop O Phone	
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10. Review assignments and click **Save**

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

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Opportunity demo opportunity		+ Follow New Case New Note Clone V
Account Name Close Date 20/07/2021	Amount Opportunity Owner €23.00 ∰ mariana kolomiiets <u>c</u>	
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Activity Details Chat	21	Related
New Task Log a Call New E	vent Email	Exalate
	Create a task Add	
	Filters: All time - All activities - All types	Status: NOT SYNCHRONIZED
	Refresh - Expand All - View A	Exalate Connect
✓ Upcoming & Overdue		
	No next steps. To get things moving, add a task or set up a meeting.	Products (0)
	No past activity. Past meetings and tasks marked as done show up here.	Notes & Attachments (0)
		▲ Upload Files
		Or drop files

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.

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	Most Recent Act	ivity ▼ Call Logs	Text Posts	Status Changes	5			Q Search	n this feed	EG
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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:

Activation: Case Record Page	
Custom record pages can be assigned at different levels:	
Ithe 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 org default to display it for all Case records, except when app default or app, record type, or profile-specific assignments defined.	are
In standard Salesforce console apps, some objects have a system app default record page. For those objects, if you assign a custom or default page, it doesn't display to users. To enable a custom org default page to show up in the console for those objects, assign a custom page as the app default. Check your assignments.	g
Assign as Org Default	
	Close

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

		Assign form	factor	
		Select the form factors that you want your org Desktop Phone O Desktop and phone	default page to be available for.	
	Cancel			Back Next
1. Rev	view the assign	nments and click Save :		
		Review assign	nment	
	Review Assignments	\$ (2)		
	Form Factor	Current Org Default	New Org Default	
	Desktop	System Default	Case Record Page	
	Phone	System Default	Case Record Page	
Product About Us	Cancel			Back Save
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