How to Manage User Permissions in Exalate for Salesforce

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This article describes how to grant users permission to use Exalate on Salesforce.

When installing Salesforce from the AppExchange marketplace you can choose whether to install the app for all the users, admins only, or some specific profiles.



If you later change your mind, you can grant permissions to specific user profiles to use Exalate.

Follow the steps below to assign Exalate Admin permissions:

1. Go to Setup -> Users -> Permissions sets -> Exalate Admin.

Setup Home Object	ct Manager 🗸 🗸						
ADMINISTRATION	Per Per	rmission Sets	TE MANOME ZOST <i>O TIZZA</i> ULE MANOME ZOSTO <i>TIZZ</i> AULE				
Permission Set Groups							
Permission Sets	Permiss	ion Sets					
Profiles	On this page y	On this page you can create, view, and manage permission sets.					
Public Groups	In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: iOS						
Queues	All Permissi	on Sets ✓ Edit I Delete I Create New View					
Roles		Edit i Delete i Create ivew view					
User Management Settings	New 🔇	/	A B C D E F G H I J K L M N O P Q R S T U V W X Y Z				
Users	Action	Permission Set Label ↑	Description				
> Data	Clone	Commerce Admin	Allow access to commerce admin features.				
•	Clone	Exalate Admin					
> Email	Clone	Exalate User					
	Clone	Facility Manager	Lets users create, read, edit, and delete locations, sublocations, que				
PLATFORM TOOLS	Clone	Merchandiser	Allow access to commerce merchandising features.				
> Apps	Clone	Order Management Agent	Read Access to all entities enabled by Order Management				
Franking Orthings	Clone	Order Management Operations Manager	Access to all features enabled by Order Management				
> Feature Settings	Clone	Order Management Shopper	Limited access to Order Management features for Self Service				

2. Click Manage Assignments.

SETUP Permission Se	ets				
Permission Set Exalate Admin					Video Tutorial
Q Find Settings	× Clone	Manage Assignments			
Permission Set Overview					
Description			API Name	ExalateAdmin	
License	Salesforce		Namespace Prefix	exalate	
Session Activation Required			Created By	mariana	05/11/2021, 08:48
Last Modified By	<u>mariana</u>	05/11/2021, 08:48			

3. Click Add Assignments.

SETUP Permission	Sets		
Assigned Users Exalate Admin « Back to: Permission Set			
			Add Assignments Remove Assignments
Full Name 🛧	Alias	Username	Assign users to this permission set. This button is not available if any users are selected.
No records to display.			
			Add Assignments Remove Assignments
			A B C D E F G H I J K L M N O

4. Select a user you want to give permissions to and click **AssignExalate admin** permissions to grant access to the Exalate console. With **Exalate user** permissions, a user can only access the sync panel.

Users						
View: All Users	e New View					
				A B C D E	F G H I J K L	M N O P Q R S
		A	Cancel			
Action Full Name +	Alias	Username	Last Login	Role	Active	Profile
Edit mariana	mkolo	mariana@idalko.com	30/09/2021, 10:04	SVP, Customer Service & Support	1	System Administrato

5. Click **Done**.

Delegated Admin Access for Non-System Admins

In some situations, you may need to grant non-system admins access to the Exalate Admin Console without giving away system-wide admin permissions. This would allow you to delegate admin maintenance tasks, such as adding, editing, and deleting Exalate configurations.

Product

For **Salesforce**, it is possible to install the app for specific profiles and the system admin can configure aispecific profile to access the app configuration. This is done by assigning the "Exalate Admin's perimission set to the salesforce user with Standard User Profile.

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