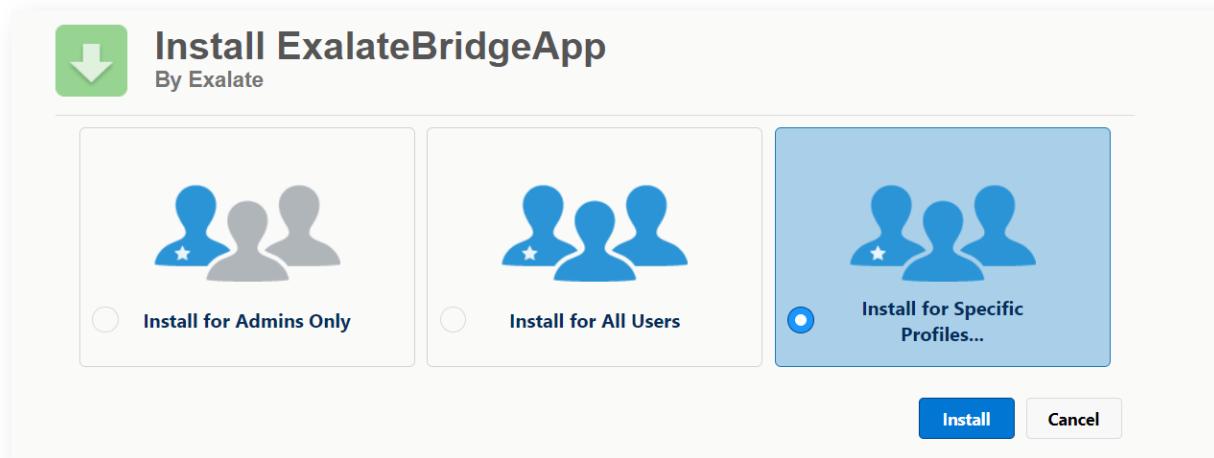


How to Manage User Permissions in Exalate for Salesforce

Last Modified on 01/15/2026 7:27 pm EST

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

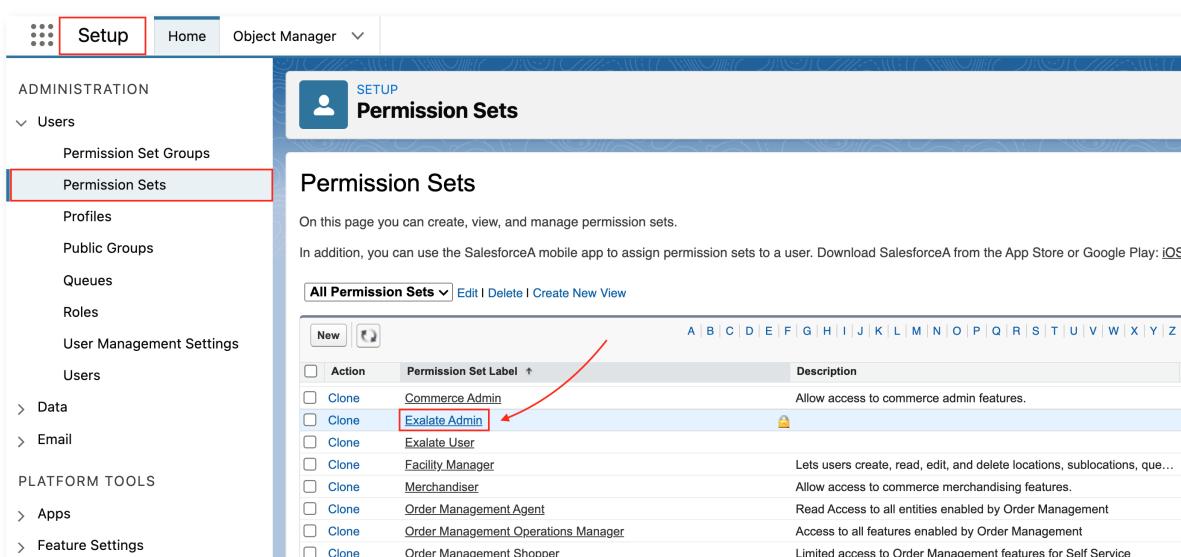
When installing Salesforce from the AppExchange marketplace you can choose whether to install the app for all the users, admins only, or some specific profiles.



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**.



The screenshot shows the Salesforce Setup interface with the following details:

- Setup** tab is selected.
- Permission Sets** page is displayed.
- Permission Sets** section header.
- Text: "On this page you can create, view, and manage permission sets. 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](#) [Android](#)".
- Action** and **Permission Set Label** columns.
- Description** column.
- Table data:

Action	Permission Set Label	Description
<input type="checkbox"/>	Commerce Admin	Allow access to commerce admin features.
<input type="checkbox"/>	Exalate Admin	Lets users create, read, edit, and delete locations, sublocations, que...
<input type="checkbox"/>	Exalate User	Allow access to commerce merchandising features.
<input type="checkbox"/>	Facility Manager	Read Access to all entities enabled by Order Management
<input type="checkbox"/>	Merchandiser	Access to all features enabled by Order Management
<input type="checkbox"/>	Order Management Agent	Limited access to Order Management features for Self Service
<input type="checkbox"/>	Order Management Operations Manager	
<input type="checkbox"/>	Order Management Shopper	

2. Click **Manage Assignments**.

The screenshot shows the 'Permission Sets' page in the Salesforce Setup. The permission set is named 'Exalate Admin'. The 'Manage Assignments' button is highlighted with a red box. The 'Permission Set Overview' section displays the following details:

Description	API Name
Salesforce	ExalateAdmin
Namespace Prefix	exalate
Session Activation Required	<input type="checkbox"/>
Created By	marianna
Last Modified By	marianna
Created	05/11/2021, 08:48

3. Click **Add Assignments**.

The screenshot shows the 'Assigned Users' page for the 'Exalate Admin' permission set. The 'Add Assignments' button is highlighted with a red box. A tooltip indicates: 'Assign users to this permission set. This button is not available if any users are selected.' The page also includes 'Remove Assignments' and 'Profile' buttons.

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

The screenshot shows the 'Assign Users' page for 'All Users'. A user named 'marianna' is selected, and the 'Assign' button is highlighted with a red box. The 'Assign' button is part of a modal dialog with 'Assign' and 'Cancel' buttons.

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 administration tasks, such as adding, editing, and deleting Exalate configurations.

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

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