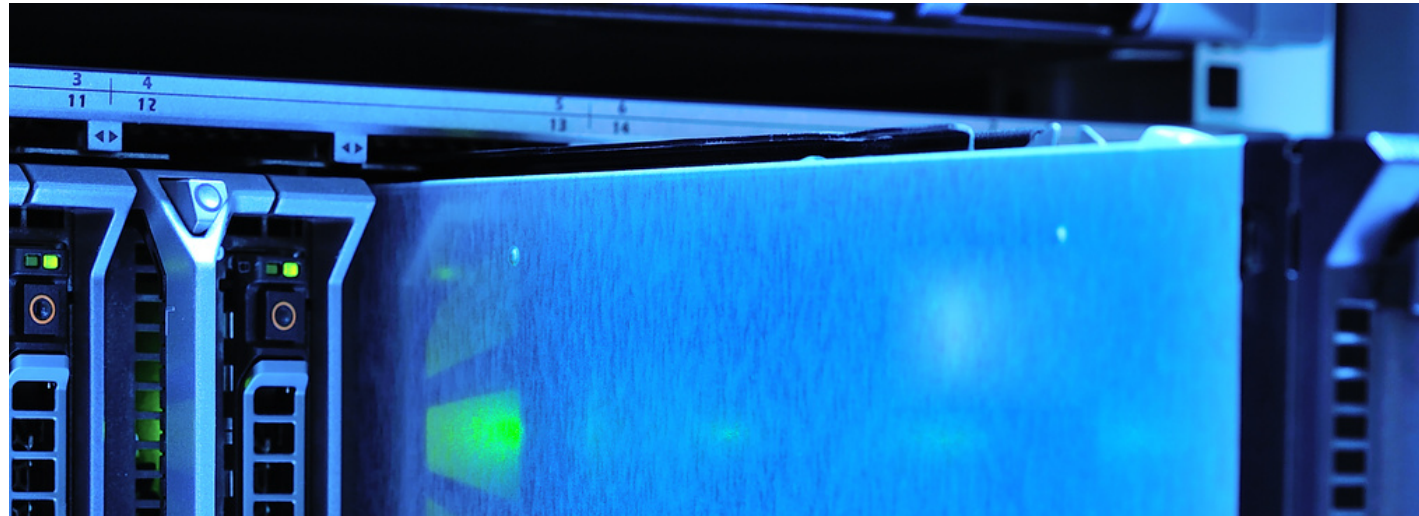




SPECIALIZATION
MANAGER



INSTALLATION AND CONFIGURATION GUIDE



Installation and Configuration of Specialization
Manager from the AppExchange

RATIONAL **RC** **CLOUD**

STEP 1

Go to the Salesforce App Exchange and search for Specialization Manager, from the App Store click "Get it Now"

STEP 2

If you are not logged in to the AppExchange, the form will ask you to log in and "Allow" access to Salesforce.

STEP 3

If you are in the AppStore within your Salesforce org, you will be redirected to the full AppExchange website to complete the installation process.

Where do you want to install this package?

Install in a Production Environment
Install this package in the org where you or your users work, including Developer Edition orgs.

* Connected Salesforce Accounts ⓘ

azmain@rtnccloud.com

Don't see your account? [More Info](#)

Install in Production

Install in a Sandbox
Test this package in a copy of a production org.

Install in Sandbox

Cancel

STEP 4

Choose if you would like to install the package in your Sandbox for testing, or your Production Org. We recommend installing our package in Sandbox first and promoting configuration to production. Please check the user guide for detailed instructions.

STEP 5

When installing Specialization Manager from the AppExchange, it's recommended to choose: "Install for System Administrators only" if you are using the default System Administrator profile for your Administrators (most organizations do that). You can also choose to install it for all users.

The application itself makes checks for the following permissions on the running user: customize application, and edit users. These permissions are required to run the application.

Manually Grant Access to Specialization Manager

To have access to Specialization Manager users have to have access to Specialization Manager's apex classes, customize applications and manage users' profile permissions.

CONGRATULATIONS

You have successfully installed the Specialization Manager app!

Your next step would be to configure the Specializations themselves.

Please visit the **Adoption flow guide** or **User guide** if you do not know what to do next.

