

QMan SMS Hero Installation

Before you get started, the installation will need to be done by someone that has System Administrative privileges to your Salesforce instance. If that is you, read on!

If you have installed packages from the AppExchange before, you will be familiar with steps 1 through 6 and can probably go ahead and do the installation without reading those steps. Once the QMan package is installed, go to step 7 for information specific to QMan.



Step 1

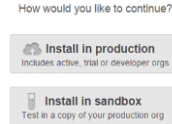
On the QMan pages of the AppExchange, click the  button

Step 2

The next screen may ask you to log in to the AppExchange or continue as a guest. If you have an AppExchange login, use it. Otherwise select continue as guest. If you do not see this screen, no worries, go to Step 3.

Step 3

You should be on a screen that looks something like this:



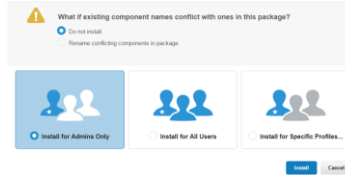
Select whether you are going to install QMan into your sandbox or production Salesforce and then agree to terms and conditions before confirming your installation

Step 4

You will be presented with a Salesforce login screen. Input the credentials for the Salesforce instance that you will be installing into.

Step 5

After you have successfully logged in to Salesforce, the following screen will appear



If there is a box that asks “What if existing component names...” at the top of your screen, we recommend that you keep the default selection of “Do not install” to the question. It is very unlikely there will be any name conflicts, but just in case.

Indicate if QMan is going to be used by Admins Only, All Users, or users with specific profiles. *Note that if you choose to install for admins only and later decide to make QMan available for non-admins, you will have to grant access to individual QMan screens to those users, so only pick Install for Admins Only if you know what you are getting into.*

Click the Install button and Salesforce will notify you once the installation is complete.

The next steps is to assign the QMan licenses to your users.

Navigate to the *Setup -> Installed Packages* screen and click the “Manage Licenses” link next to the QMan package.

Step 6

Click the “Add Users” button and select the users that will be using QMan on the next page. You will only be able to select the number of users up to the number of licenses that you have purchased. Once you have selected the users, click the “Add” button under the lower table.

Step 7

There is actually no Step 7 for the *installation*...the next steps are to configure QMan. To do this, download and follow the steps outlined in the Qman SMS Hero Configuration Guide. You can get the configuration guide from the QMan AppExchange website.