



| an OSF Product

Community Cloud **LICENSES OPTIMIZER**

Licensing Tool for Salesforce Community

OSF LICENSES OPTIMIZER for SALESFORCE COMMUNITY CLOUD

Installation Guide

Table of Contents

1	Package Installation	3
2	Installing Application from AppExchange	3
2.1	Editing the Available Licenses.....	6

1 Package Installation

Prerequisites:

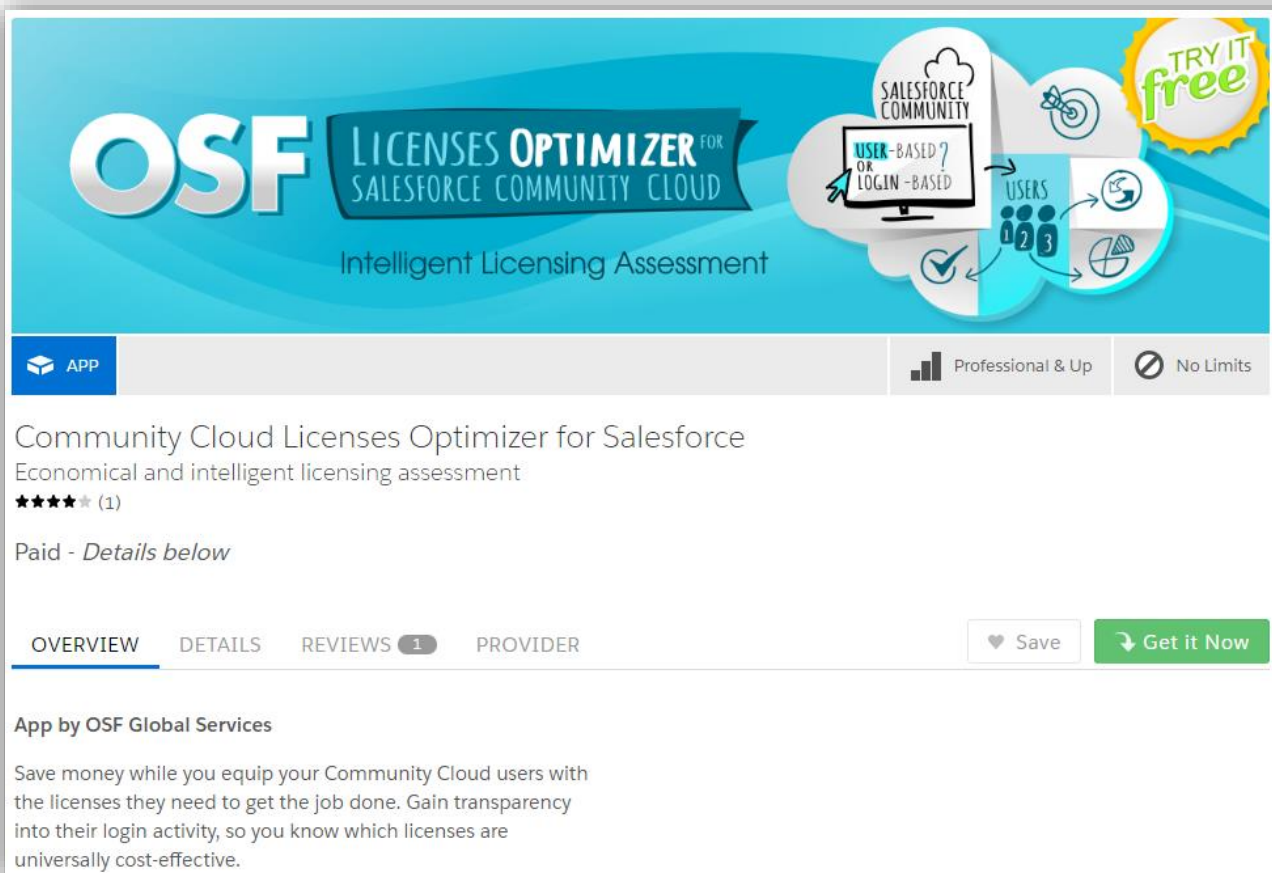
1. To install the application, you have to be logged in as an administrator in your Salesforce instance.
2. Salesforce Communities have to be enabled on the organization you intend to install the application in.
3. The application can be installed in Professional, Enterprise, Unlimited, Force.com and Developer Salesforce editions.

2 Installing Application from AppExchange

Step 1:

To get the application, please follow this link:

<https://appexchange.salesforce.com/listingDetail?listingId=a0N3000000B5Z2vEAF>



After clicking the "Get It Now" button from the AppExchange page and logging in with your Salesforce credentials, a page like the one below will appear.

Step 2:

Choose where you want to install the application:

- In your production environment, or
- In the sandbox environment

You will be able to choose by clicking one of the available buttons.



After clicking one of the buttons, you will be redirected to a page, where you are provided with information about the package installation.

Step 3:

In order to proceed, you will need to check the box at the bottom of the package information form, next to the text "I have read and agree to the terms and conditions."

To start installation:

1. Check the box in front of "I have read and agree to the terms & conditions.";
2. Click "Confirm and Install".

OVERVIEW
DETAILS
REVIEWS 1
PROVIDER

Save
Get it Now

Almost there!

Before installing, please review the [customization guide](#) to familiarize yourself with the installation and configuration steps for this application.

WHAT YOU ARE INSTALLING	WHERE YOU ARE INSTALLING
PACKAGE Community Cloud Licenses Optimizer for Salesforce	ORGANIZATION
VERSION OSF Community License Optimizer (March 17, 2015 / 1.6.7)	EDITION
SUBSCRIPTION Free Trial	USER NAME
DURATION 15 Days	
NUMBER OF SUBSCRIBERS Site-wide	

☐ I have read and agree to the [terms and conditions](#).

[Cancel Install](#) | [Back to previous step](#)

Confirm and Install!

Important: We recommend that before proceeding with installation you read the **User Guide**, which is available by clicking the link in the information box at the top of the page.

Step 4:

You will be prompted to select the users you want the app to be available for in your Salesforce org. Select „Install for All Users” option and click „Install”.

Install OSF Community License Optimizer
By OSF Global Services (Partner Main)

☐ Install for Admins Only

☒ Install for All Users

☐ Install for Specific Profiles...

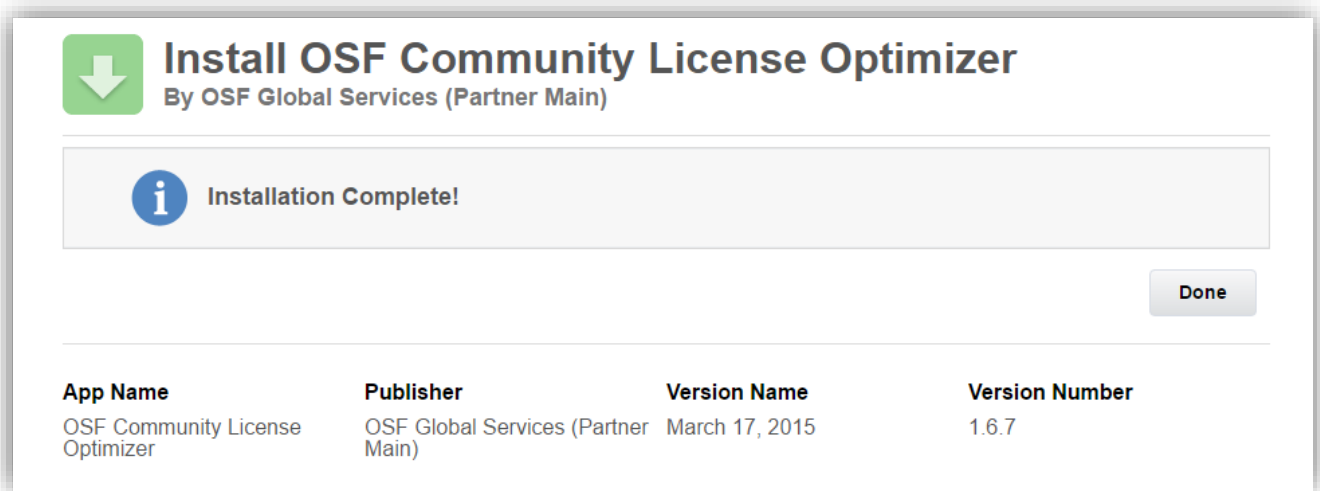
Install
Cancel

App Name	Publisher	Version Name	Version Number
OSF Community License Optimizer	OSF Global Services (Partner Main)	March 17, 2015	1.6.7

Additional Details
View Components
API Access

Step 5:

Once the app is installed, click „Done” to finalize process.



2.1 Editing the Available Licenses

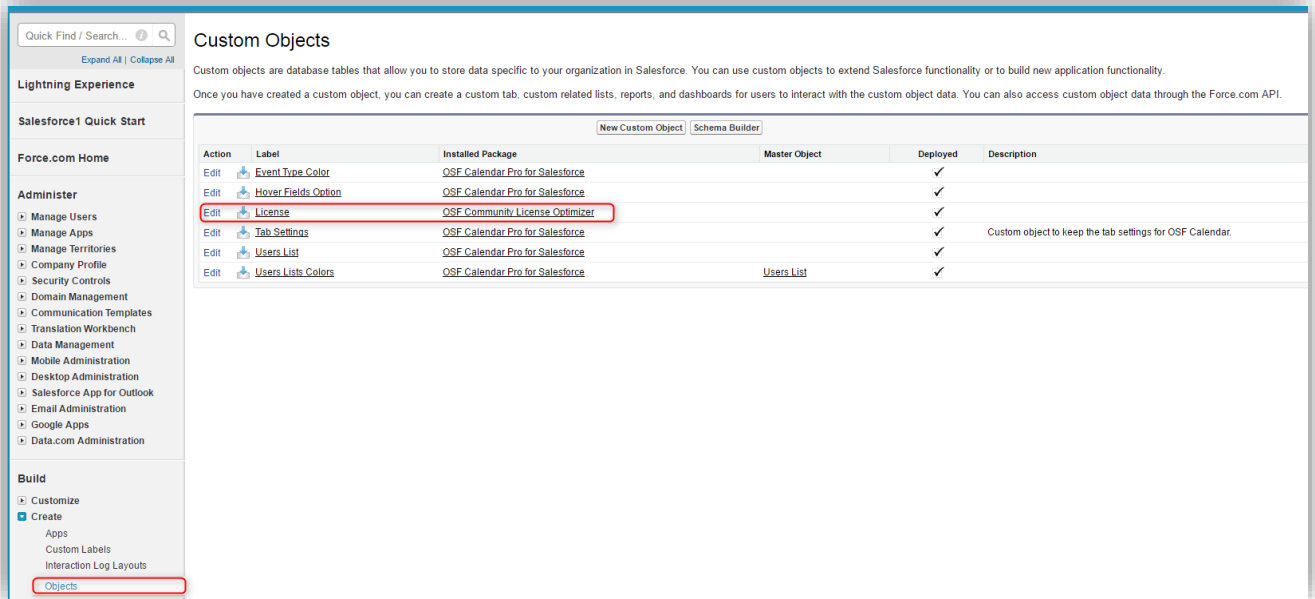
Step 1:

In order to be able to edit the licenses available for selection you have to access the setup page, which is available from the dropdown menu, in the upper right corner, which appears after you click on your profile.



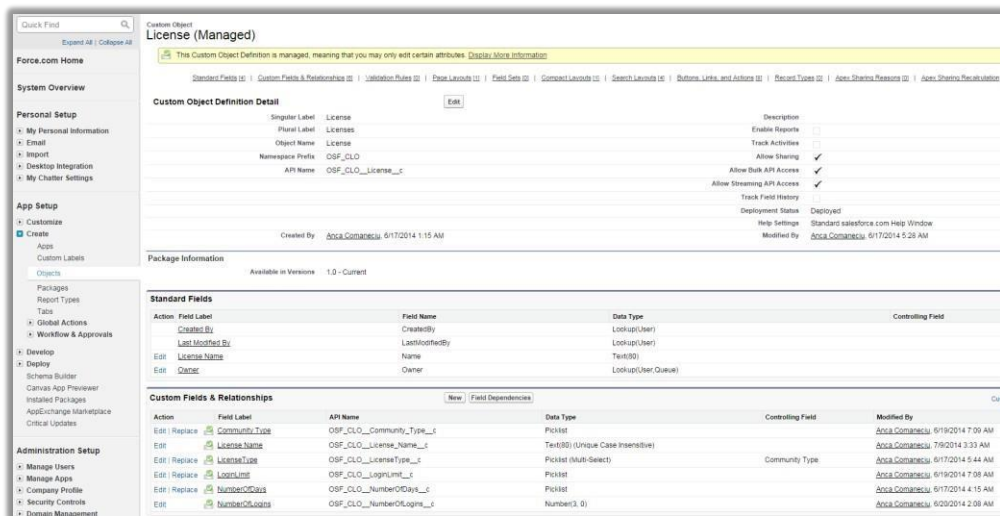
Step 2:

In the setup menu on the right, in the “Build” section, select “Objects” and then click on the “License” custom object. This will open the Custom Object page, where you can view and edit the License label.



Step 3:

On the License (Managed) page, scroll down until you see the Custom Fields & Relationships section. Here you will be able to view and edit the "Community Type" and "License Type" buttons.



Step 4:

After you click one of these buttons you will be taken to either the Community Type (Managed) page or the License Type (managed) page depending on which one you clicked. On these pages you will need to scroll down until you see the "Picklist Values" section, where you will see the option present here and also the "Del" button that will allow you to remove a certain option.

Picklist Values			
New Reorder Replace Printable View			
Action	Values	Default	Modified By
Edit Del	Customer Community	☐	Anca Comaneci, 6/17/2014 4:12 AM
Edit Del	Customer Community Login	☐	Anca Comaneci, 6/17/2014 4:12 AM
Edit Del	Partner Community Login	☐	Anca Comaneci, 6/17/2014 4:12 AM
Edit Del	Partner Community	☐	Anca Comaneci, 6/17/2014 4:12 AM
Edit Del	Partner	☐	Anca Comaneci, 6/17/2014 4:12 AM
Edit Del	Customer Portal Manager	☐	Anca Comaneci, 6/17/2014 4:12 AM
Edit Del	High Volume Customer Portal	☐	Anca Comaneci, 8/6/2014 12:55 AM
Edit Del	Customer Portal Manager Custom	☐	Anca Comaneci, 6/17/2014 4:12 AM
Edit Del	Customer Portal Manager Standard	☐	Anca Comaneci, 6/17/2014 4:12 AM
Edit Del	Customer Community Plus	☐	Anca Comaneci, 8/7/2014 1:18 AM
Edit Del	Chatter Only	☐	Anca Comaneci, 8/29/2014 1:28 AM

Step 5:

On both pages (Community Type and License type) you can see the "New" button. After clicking on this button, you will see the following screen, where you can add the value that you want, then click on "Save".

Add Picklist Values
LicenseType

Add one or more picklist values below. Each value should be on its own line.

Save
Cancel

Step 6:

In the Community Type (managed) page you can see the section "Field Dependencies"; click on the edit button to include or exclude values corresponding to the one that you removed or added in the previous step.

Click button to include or exclude selected values from the dependent picklist			
Include Values Exclude Values			
Community Type:		Partner Community	Showing Columns: 1 - 2 (of 2) < Previous Next > View All > Go to
LicenseType:		Customer Community	Customer Community
		Customer Community Login	Customer Community Login
		Partner Community Login	Partner Community Login
		Partner Community	Partner Community
		Partner	Partner
		Customer Portal Manager	Customer Portal Manager
		High Volume Customer Portal	High Volume Customer Portal
		Customer Portal Manager Custom	Customer Portal Manager Custom
		Customer Portal Manager Standard	Customer Portal Manager Standard
		Customer Community Plus	Customer Community Plus
		Chatter Only	Chatter Only
Click button to include or exclude selected values from the dependent picklist			
Include Values Exclude Values			
Save Cancel Preview			

If you have any questions, contact us at info@osf-commerce.com.