



| an OSF Product

Community Cloud

LICENSES OPTIMIZER

Licensing Tool for Salesforce Community

**OSF LICENSES OPTIMIZER
for SALESFORCE COMMUNITY CLOUD**

User Guide

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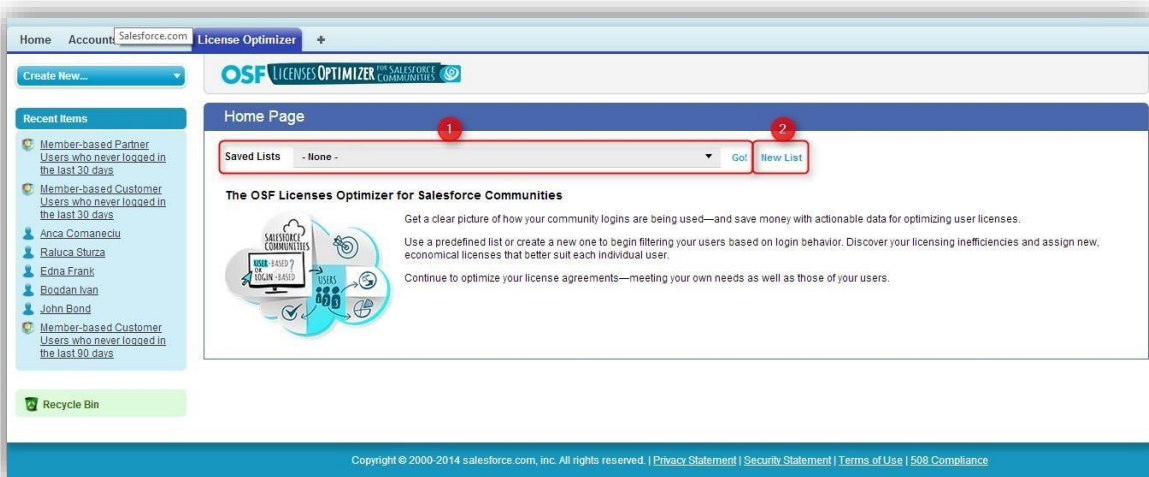
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1 Introduction

The OSF LICENSES OPTIMIZER for Salesforce Community Cloud is designed to provide companies that use Salesforce Communities the ability to identify and sort their Community users by frequency of login and license type, and assign them an appropriate license type to reduce their Salesforce license costs.

2 The Home Page

On the OSF LICENSES OPTIMIZER for Salesforce Community Cloud home page you can start optimizing your Community licenses usage. For doing so, 2 options are available:



1. Choose from one of the saved, predefined lists available in the newly installed application;
2. Create a new custom list by choosing your own filtering criteria.

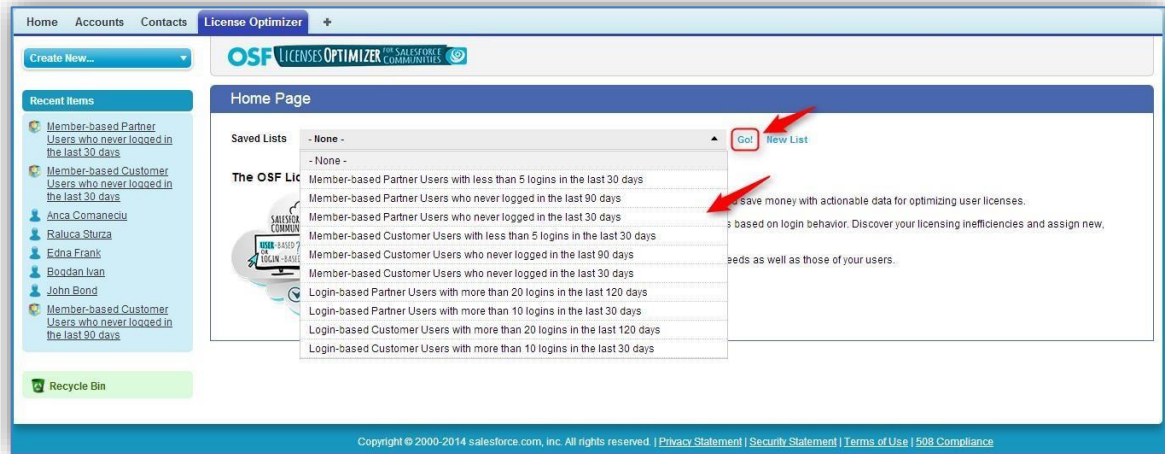
2.1 Saved Lists

The OSF LICENSES OPTIMIZER for Salesforce Community Cloud comes with 10 off-the-shelf predefined lists to get you started.

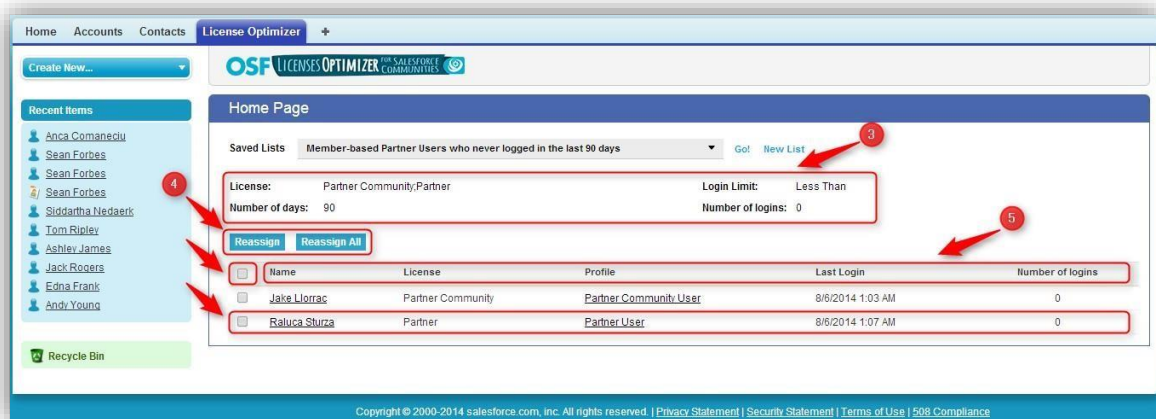
- Login-based Customer Users with more than 10 logins in the last 30 days;
- Login-based Customer Users with more than 20 logins in the last 120 days;
- Login-based Partner Users with more than 10 logins in the last 30 days;
- Login-based Partner Users with more than 20 logins in the last 120 days;
- Member-based Customer Users who did not login in the last 30 days;
- Member-based Customer Users who never logged in in the last 90 days;
- Member-based Customer Users with less than 5 logins in the last 30 days;
- Member-based Partner Users who did not login in the last 30 days;

- Member-based Partner Users who never logged in in the last 90 days;
- Member-based Partner Users with less than 5 logins in the last 30 days.

If one of these lists suits your needs, select it and click "Go" next to the Saved Lists dropdown.



The below screen will appear:



3. The criteria used to filter the displayed users to whom the Community licenses are assigned.

4. Two „Reassign” buttons:

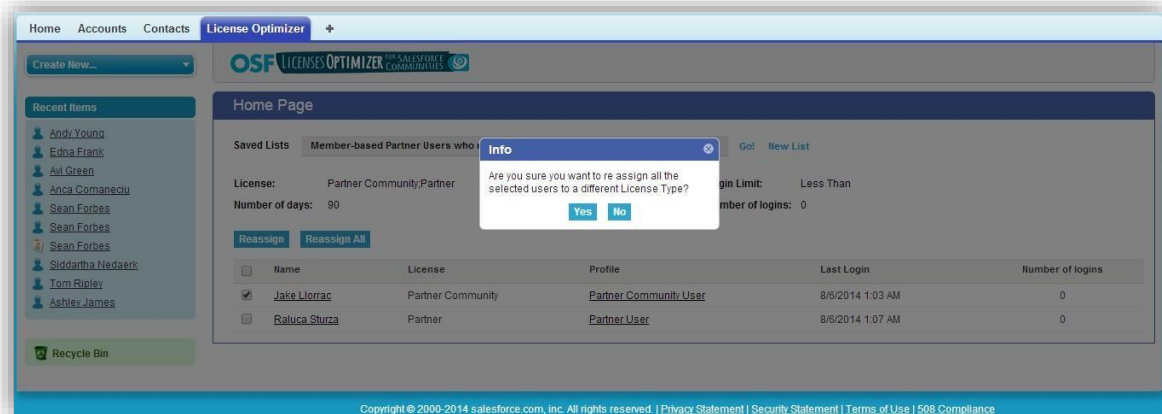
- “Reassign”–reassigns only the selected users from the displayed list;
- “Reassign All”–reassigns all users in the displayed list.

5. The user list which displays all users that match the selected filter criteria

- The list displays the following information about the users: Name, License Type, Profile Type, Last Login (date and time), Number of Logins from the selected time period (this information is available in the section where the filter criteria are displayed);

- The users from the paginated list can be selected individually by checking the boxes in front of their names;
- A whole page of the user list can be selected by checking the box at the top of the user list.

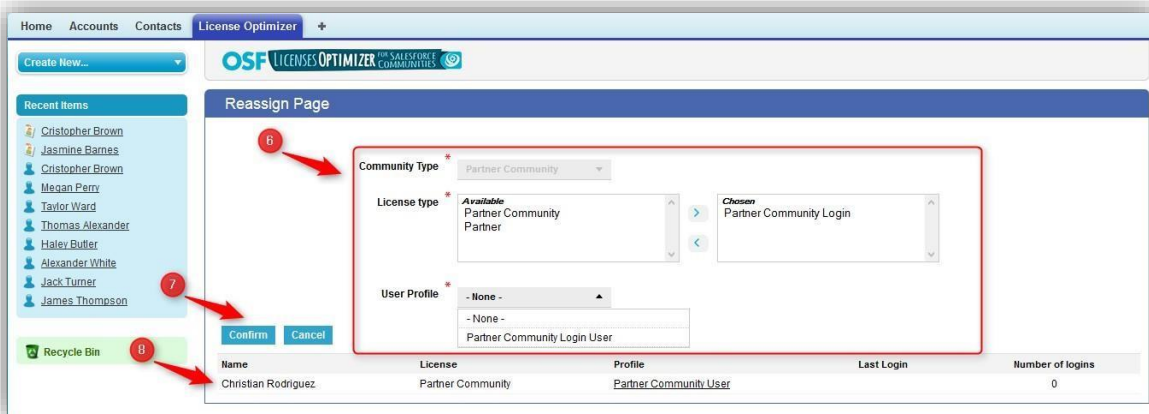
After you chose the users you want to reassign to a different license type, click “Reassign” and you will be prompted with a message to confirm that you want to reassign the selected users.



After, you will be redirected to the Reassign Form allowing you to select which license type and profile you want to reassign the selected users to.

2.2 Reassigning users

The Reassign Form has the following sections:



6. Reassign Section, which allows you to select the desired license type and profile type;
 - You can only reassign within the same community type, therefore the Community Type dropdown will be locked to the Community type the selected users belong to;

- In the License Type multi-select picklist only the license types available for the respective community type are displayed;
 - The reassignment can be made to only one license;
 - **NOTE:** Due to Salesforce restrictions, more than one license can be selected from the list; however, if more than one are selected, when you try to confirm the reassignment you will receive an error message warning you about the fact that you cannot reassign users to multiple licenses;
 - **NOTE:** Please note that the reassignment process has limits concerning the target licenses; if a reassignment is not available, you will receive an error message after clicking the “Confirm” button, stating what causes the restriction;
 - You can also choose the profile to which you can assign the users selected for reassignment;
7. After selecting the desired license type and profile type, you can push the “Confirm” button to execute the reassignment.

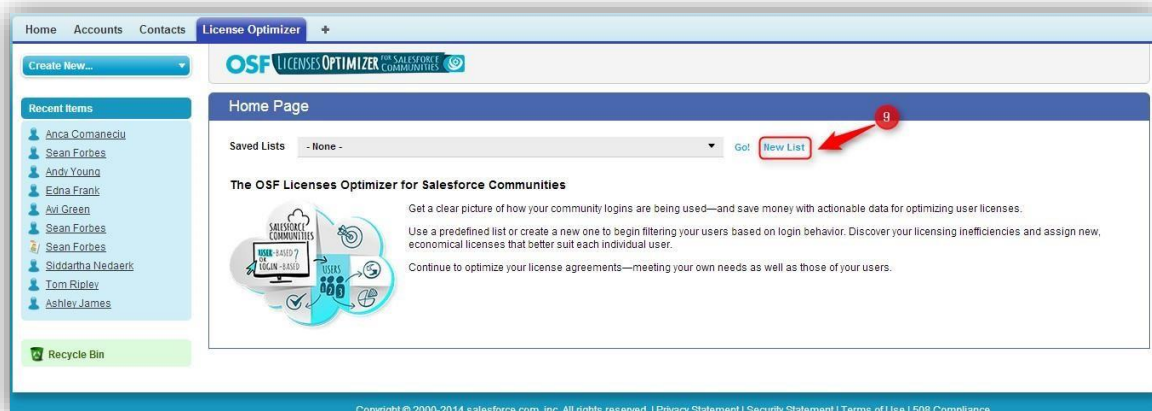
If you decide to abort reassignment process, click “Cancel” to get redirected to the previous screen with the displayed user list;

8. In the bottom section of the page, you can review the users selected for reassignment

The displayed information is the same as in the list where you can choose the users for reassignment; however, you cannot make any changes from here.

2.3 New Lists

If neither of the predefined lists suits your needs, from the home page, you have the option to create a new custom list with the desired filter criteria. To do so, push the “New List” button (9). This new list that you create will be saved in the Saved Lists dropdown.



To select the needed filter criteria for your custom list, fill out the fields of the New List form where:

10. New List Name –give your new list a name;

Each list should have an unique name; if you try to save a list with an already used name, an error message will be displayed;

- 11. Community type – you can choose users from the particular Community type to be displayed;
- 12. In the multi-picklist, the license types available for the chosen community type will be displayed;
- 13. Number of logins – choose either “Less Than” or “More Than”; after, choose the number of logins to display;
- 14. Number of days in which the selected logins occurred.

Once you have selected all the needed criteria, you will be redirected to the home page and your custom list will appear in the Saved Lists dropdown.

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