



| an OSF Product

LICENSES OPTIMIZER

Licensing Tool for Salesforce Community

OSF | DIGITAL

Cut expenses by implementing licensing
that boosts ROI



AppExchange
Certified



LIVE
Demo



FREE
Trial



CUSTOMIZATION
Services Available



| an OSF Product

LICENSES OPTIMIZER

Licensing Tool for Salesforce Community

Too often costly unlimited login licenses are wasted on users who log in only a few times per month. Gain transparency into your Salesforce Experience Cloud users' login activity with Licenses Optimizer and know which licenses are really needed in your organization to get the job done.

Choosing to use **Licenses Optimizer**, our visibility tool, means a clear picture of how your **Salesforce Experience Cloud** logins are being used and actionable data for optimizing community engagement and maximizing your savings. It's a small investment that pays off big time and a tool you will value for the duration of your Salesforce partnership.

WHAT'S IN IT FOR YOU?



IDENTIFY

and list users by community type, license type, number of logins and login frequency



ORGANIZE

all licensing data using various types of user lists, and create custom lists of your own



REASSIGN

users to the most economically efficient license types according to their login behavior



IMPROVE

the community usage experience with efficient planning on licensing strategies. Get custom reports on user's login behavior



REDUCE

license costs and maximize the return on your investment

NEW LICENSING STRATEGY FOR COMMUNITY

OSFDIGITAL

EASY-TO-USE PLUGIN

Reap benefits from this easily integrated app. 15-day Free Trial available.

CONVENIENTLY SORT LICENSING DATA

Increase Community engagement. Maximize ROI in your Salesforce Experience Cloud. Organize your licensing data using off-the-shell user lists or create a new one for your unique business needs.

SCHEDULE A LIVE DEMO

GROUP COMMUNITY USERS

Organize all licensing data using various types of user lists and gain transparency into community users' login activities.

VALUABLE REPORTING

Get custom reports on users' login behavior and have complete visibility on community licenses usage. Use built-in or custom filtered lists and track the activity by number of logins within a designated time period.

OPTIMIZE COMMUNITY LICENSES

Reassign community profiles and permission sets to users of the most economically efficient license type based on login behavior generated directly from the filtered lists.

PREDEFINED AND CUSTOM LISTS OF COMMUNITY USERS

The screenshot displays the 'License Optimizer' interface. At the top, a navigation bar includes links for 'Dashboards', 'Event Type Colors', 'Users Lists', 'Accounts', 'Contacts', 'Calendar', and 'License Optimizer'. Below this, the 'Home Page' section features a 'Saved Lists' dropdown menu with the selected list: 'Member-based Partner Users with less than 5 logins in the last 30 days'. A red box highlights this dropdown, and a red arrow points from it to the table below. The table lists users with the following columns: Name, License, Profile, LastLoginDate, and Number of logins. Two users are listed: Denisa Viasceanu and Erin Jones, both with 'Partner Community' licenses and 'Partner Community User Clone' profiles. The table also includes a 'Records per page' dropdown set to 10 and pagination controls showing 'Page 1 of 1'. A dark blue callout box on the right contains the text: 'Use a predefined list or create a new one to gain transparency into community users' login activities.'

Name	License	Profile	LastLoginDate	Number of logins
Denisa Viasceanu	Partner Community	Partner Community User Clone	02/12/2016 12:02	0
Erin Jones	Partner Community	Partner Community User Clone	23/03/2017 09:41	2

OFF-THE-SHELF LISTS OF USERS

Home Page

Saved Lists

Member-based Partner Users with less than 5 logins in the last 30 days

Go! Delete List New List

- None -

Member-based Partner Users with less than 5 logins in the last 30 days

Member-based Partner Users who never logged in the last 90 days

Member-based Partner Users who never logged in the last 30 days

Member-based Customer Users with less than 5 logins in the last 30 days

Member-based Customer Users who never logged in the last 90 days

Member-based Customer Users who never logged in the last 30 days

Login-based Partner 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 Customer Users with more than 20 logins in the last 120 days

Login-based Customer Users with more than 10 logins in the last 30 days

Users with Le
Partner;Partn

Reassign

☐ Name Me

☐ Deni

☐ Erin

Records p

Profile	LastLoginDate	Number of logins
Partner Community User Clone	02/12/2016 12:02	0
Partner Community User Clone	23/03/2017 09:41	2

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OSF LICENSES OPTIMIZER FOR SALESFORCE COMMUNITIES

Off-the-shelf lists help to sort community users. Get started by using the default lists right away.

CUSTOM LISTS OF COMMUNITY USERS

Home Accounts Contacts License Optimizer +

Create New...

Recent Items

No records to display

Recycle Bin

OSF LICENSES OPTIMIZER FOR SALESFORCE COMMUNITIES

Custom List

List Name: New Test List 1

Community Type: Customer Community

License Type:

- ☒ Customer Community
- ☒ Customer Community Login
- ☒ Customer Community Plus
- ☒ Customer Community Plus Login
- ☒ Customer Portal Manager
- ☒ Customer Portal Manager Custom
- ☒ Customer Portal Manager Standard
- ☒ High Volume Customer Portal

Number of Logins: Less Than 15

Permission Sets:

- ☐ CC Permission Set
- ☐ CCL Permission Set

Save Cancel

Take advantage of the ability to create Custom lists for an improved view that better suits your unique needs. Filter community users by 1. Number of Logins within designated time period, 2. License Type or 3. Permission Sets.

FILTER ACCORDING TO NUMBER OF DAYS

The screenshot displays the OSF License Optimizer web application. The main section is titled 'Custom List' and contains several configuration fields:

- List Name:** New Test List 1
- Community Type:** Customer Community
- License Type:** A list of checkboxes including Customer Community, Customer Community Login, Customer Community Plus, Customer Community Plus Login, Customer Portal Manager, Customer Portal Manager Custom, Customer Portal Manager Standard, and High Volume Customer Portal.
- Number of Logins:** (Empty field)
- Number of Days:** A picklist menu is open, showing options: --None-- (selected), 7, 30, 60, 90, and 120.
- Permission Sets:** (Empty field)

At the bottom of the configuration area are 'Save' and 'Cancel' buttons. The footer of the application shows 'Copyright © 2000-2017 salesforce.com'.

Visualize a list of community Users according to Default values featured in the Number of Days picklist: 7, 30, 60, 90 and 120. Additional values can be added by OSF Support if required.

FILTER & REASSIGN

Dashboards

Event Type Colors

Users Lists

Accounts

Contacts

Calendar

License Optimizer

OSF

LICENSES OPTIMIZER

FOR SALESFORCE COMMUNITIES

Home Page

Saved Lists

Member-based Customer Users who never logged in the last 90 days

Go!

Delete List

New List

Users who never logged in the past 90 days with the following license types
Customer Community;Customer Community Plus;Customer Portal Manager;Customer Portal Manager Custom;Customer Portal Manager Standard;High Volume Customer Portal

Reassign

Reassign All

☒

Name ▲

☒

CustomerPlus User

☒

Customer User

☒

Radu Customer User

Records per page

10

License	Profile	LastLoginDate	Number of logins
Customer Community Plus	Customer Community Plus User		0
Customer Community	Customer Community User	02/12/2016 13:00	0
Customer Community	Customer Community User	02/12/2016 11:27	0

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Page 1 of 1

Next

Last

Filter community Licenses according to your criteria and Reassign either some or all of the licenses to Users to assign them to the most economically efficient license type (based on login behavior).

REASSIGN COMMUNITY USERS

Dashboards

Event Type Colors

Users Lists

Accounts

Contacts

Calendar

License Optimizer

OSF

LICENSES OPTIMIZER

FOR SALESFORCE COMMUNITIES

Home Page

Saved Lists

Member-based Customer Users who never logged in the last 90 days

Go!

Delete List

New List

Users who never logged in the past 90 days with the following license types

er Community Plus;Customer Portal Manager;Customer Portal Manager Custom;Customer Portal Manager Standard;High Volume Customer Portal

Reassign

Reassign All

☒	Name ▲	License	Profile	LastLoginDate	Number of logins
☒	CustomerPlus User	Customer Community Plus	Customer Community Plus User		0
☒	Customer User	Customer Community	Customer Community User	02/12/2016 13:00	0
☒	Radu Customer User	Customer Community	Customer Community User	02/12/2016 11:27	0

Records per page

10

First

Previous

Page 1 of 1

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Last

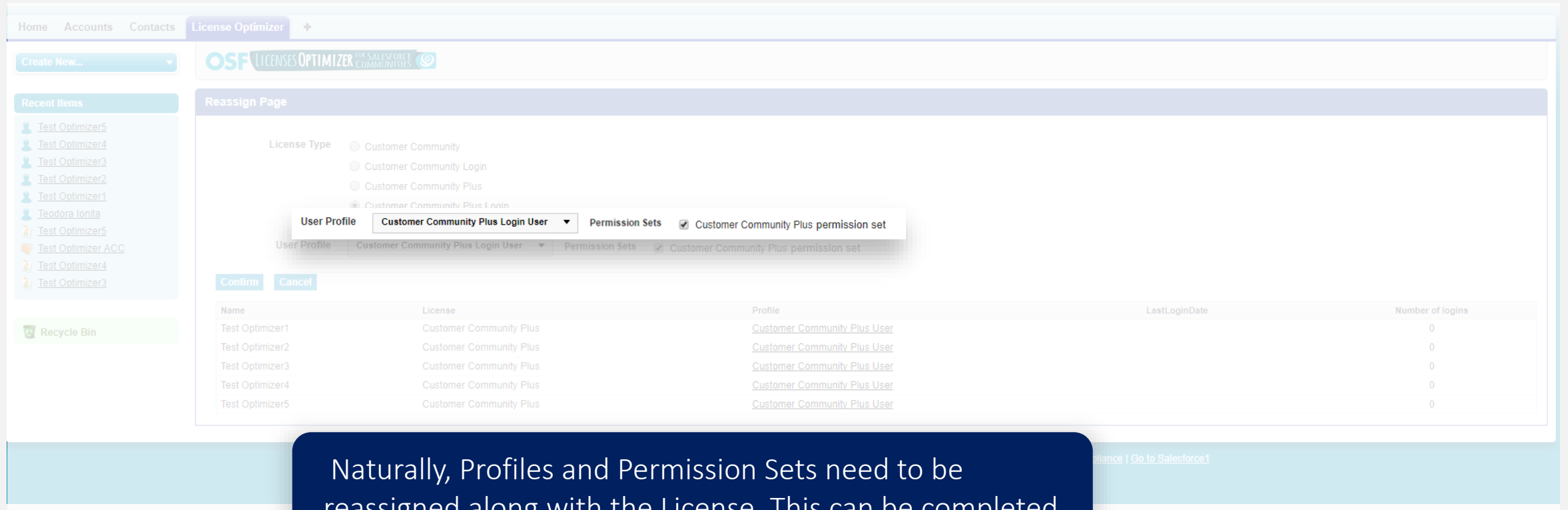
Statement

Terms of Use

508 Compliance

Choose the preferred user profile to reassign Community Users by selecting the desired user lists and clicking Reassign/Reassign All.

REASSIGN: PROFILES & PERMISSION SETS



The screenshot displays the 'License Optimizer' interface for Salesforce Communities. The 'Reassign Page' is active, showing a modal for assigning a user profile and permission set to a license. The modal is titled 'Reassign Page' and contains the following information:

- License Type:** Customer Community Plus Login (selected)
- User Profile:** Customer Community Plus Login User (selected)
- Permission Sets:** Customer Community Plus permission set (checked)

Below the modal, there are 'Confirm' and 'Cancel' buttons. At the bottom of the page, there is a table with the following columns: Name, License, Profile, LastLoginDate, and Number of logins.

Name	License	Profile	LastLoginDate	Number of logins
Test Optimizer1	Customer Community Plus	Customer Community Plus User		0
Test Optimizer2	Customer Community Plus	Customer Community Plus User		0
Test Optimizer3	Customer Community Plus	Customer Community Plus User		0
Test Optimizer4	Customer Community Plus	Customer Community Plus User		0
Test Optimizer5	Customer Community Plus	Customer Community Plus User		0

Naturally, Profiles and Permission Sets need to be reassigned along with the License. This can be completed directly from the License reassignment page.

HomeAccountsContactsLicense Optimizer+

Create New...

Recent Items

Test Optimizer5

Test Optimizer4

Test Optimizer3

Test Optimizer2

Test Optimizer1

Teodora Ionita

Test Optimizer5

Test Optimizer ACC

Test Optimizer4

Test Optimizer3

Recycle Bin

OSF LICENSES OPTIMIZER FOR SALESFORCE COMMUNITIES

Reassign Page

License Type

☐ Customer Community

☐ Customer Community Login

☐ Customer Community Plus

☒ Customer Community Plus Login

☐ High Volume Customer Portal

User Profile

Customer Community Plus Login User

Permission Sets

☒ Customer Community Plus permission set

User Profile

Customer Community Plus Login User

Permission Sets

☒ Customer Community Plus permission set

Confirm

Cancel

Name	License	Profile	LastLoginDate	Number of logins
Test Optimizer1	Customer Community Plus	Customer Community Plus User		0
Test Optimizer2	Customer Community Plus	Customer Community Plus User		0
Test Optimizer3	Customer Community Plus	Customer Community Plus User		0
Test Optimizer4	Customer Community Plus	Customer Community Plus User		0
Test Optimizer5	Customer Community Plus	Customer Community Plus User		0

Whenever you select a License Type, all affiliated Profiles and Permission Sets will also be displayed and can be reassigned accordingly.

WANT MORE THAN JUST OUT OF THE BOX?

OSFDIGITAL

Our Certified Commerce Specialists can help you with:



Integration Services

Nobody knows better than us how to seamlessly integrate our products on your website



Live Demo

We want to show you our products in action and give you tips on how to use them best



Customization Services

Your business is unique and we know how to enhance our products to better suit your needs

SCHEDULE A LIVE DEMO

REACH THE POTENTIAL OF YOUR ONLINE SHOP

with our Apps & Components for Salesforce

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LICENSES OPTIMIZER

Licensing Tool for Salesforce Community



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CALENDAR PRO

Shared Calendar for Salesforce



| an OSF Product

Community PLANNER

Calendar for Partner Community



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Picklist INSIGHTS

Picklist Data Tracking for Salesforce

EXPLORE FULL CATALOG

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THANK YOU