



LOGIsense

**LogiSense Advanced Usage Based Pricing and Data Transformation -
For Salesforce**

Version 1.0

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Step 1: Steps to Install and Setup Package

Install for All Users

Install Package for All Users using the below link.

<https://login.salesforce.com/packaging/installPackage.apexp?p0=04t8c000000tlw8>



Install LogiSense Advanced Usage Based Pricing and Data Transformation - For Salesforce

By LogiSense



What if existing component names conflict with ones in this package?

☒ Do not install.

☐ Rename conflicting components in package.



☐ Install for Admins Only



☒ Install for All Users



☐ Install for Specific Profiles...

Install

Cancel

App Name	Publisher	Version Name	Version Number
LogiSense Advanced Usage Based Pricing and Data Transformation - For Salesforce	LogiSense	Version 1	1.0

Note: If you are installing into a sandbox organization you must replace the initial portion of the URL with <http://test.salesforce.com>

Admin will receive a package installation confirmation email once the package is successfully installed or will be navigated to below screen.



Install LogiSense Advanced Usage Based Pricing and Data Transformation - For Salesforce

By LogiSense



Installation Complete!

Done

App Name	Publisher	Version Name	Version Number
LogiSense Advanced Usage Based Pricing and Data Transformation - For Salesforce	LogiSense	Version 1	1.0

Package installation can also be confirmed from installed packages page

Setup -> Apps -> Packaging -> Installed Packages



SETUP

Installed Packages

Installed Packages

On AppExchange you can browse, test drive, download, and install pre-built apps and components right into your salesforce.com environment. [Learn More about Installing Packages.](#)

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "In Development" and are not deployed to your users. This allows you to test and customize before deploying. You can deploy the components individually using the other features in setup or as a group by clicking Deploy.

Depending on the links next to an installed package, you can take different actions from this page.

To remove a package, click Uninstall. To manage your package licenses, click Manage Licenses.



Installed Packages

Action	Package Name	Publisher	Version Number	Namespace Prefix	Install Date	Limits	Apps	Tabs	Objects
Uninstall	LogiSense Advanced Usage Based Pricing and Data Transformation - For Salesforce	LogiSense	1.0		2/24/2022, 12:59 PM	✓	0	1	0
Description Package Allows Access to LogiSense Advanced Usage Based Pricing and Data Transformation Tableau Dashboard. Pre-Requisite: Tableau Online License.									

Note: To view the dashboard users need to have a Tableau Online Account. The tab grants access to the login page of Tableau online. However, without an active Tableau online account users cannot successfully login to view the dashboard.

To know more about the tableau licenses, refer below document.

<https://www.tableau.com/pricing/teams-orgs>

Skip to Step 2

Install for Admins

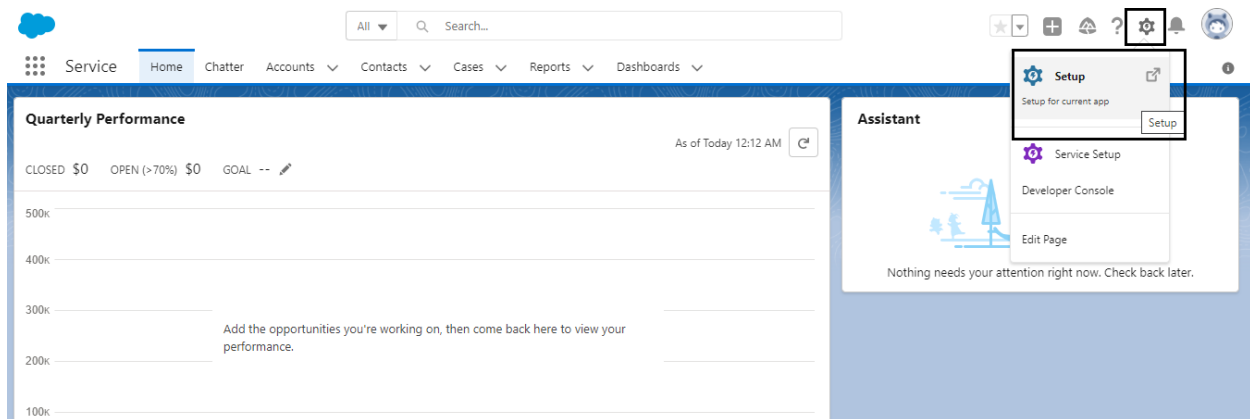
Install Package for Admin using the below link.

<https://login.salesforce.com/packaging/installPackage.apexp?p0=04t8c000000tlw8>

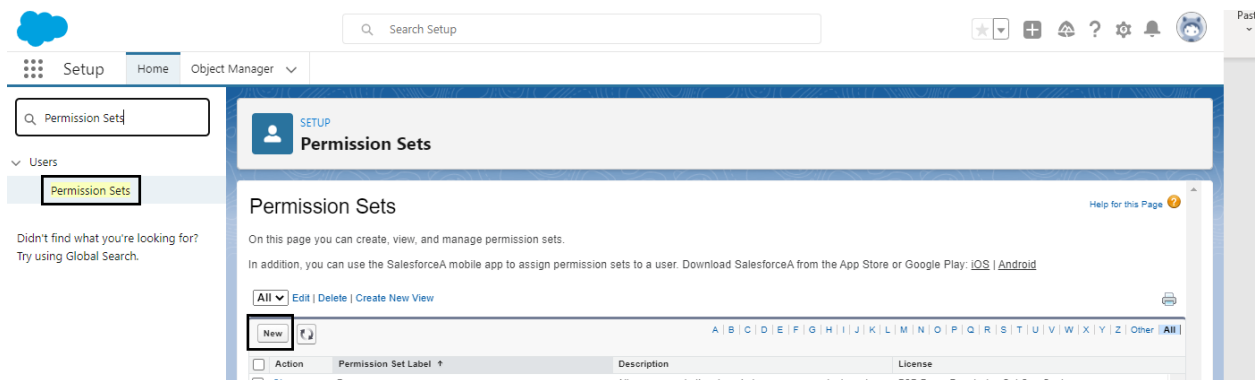
Note: Admin users can access the dashboard with out any additional steps as mentioned in Step 2. However, a permission set should be created and assigned to Non – Admin Users for Tab access and VisualForce Page access.

Create Permission Set for Non – Admins for Dashboard Access

Go to Setup



Navigate to Permission Sets and click new



Enter Permission Set information.

Example Name: LogiSense Usage Dashboard

API name will be updated.

Description: Allows access to LogiSense Usage Dashboard Tab

Session Activation Required and License can be left unchecked and blank and Save.

Permission Set
Create

[Help for this Page](#)

Save

Cancel

Enter permission set information

Label

LogiSense Usage Dashboard

API Name

LogiSense_Usage_Dashboard

Description

Allows access to LogiSense Usage Dashboard Tab

Session Activation Required

☐

Select the type of users who will use this permission set

Who will use this permission set?

-Choose --None-- if you plan to assign this permission set to multiple users with different user and permission set licenses.

-Choose a specific user license if you want users with only one license type to use this permission set.

-Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.

Not sure what a permission set license is? [Learn more here.](#)

License

--None--

Navigate to Object Setting -> Go to Usage Dashboard

Permission Set

LogiSense Usage Dashboard

Find Settings...

Clone

Delete

Edit Properties

Manage Assignments

Permission Set Overview

Description

Allows access to LogiSense Usage Dashboard Tab

API Name

LogiSense_Usage_Dashboard

License

Namespace Prefix

Session Activation Required

☐

Created By

summer 20, 2/21/2022, 12:21 AM

Last Modified By

summer 20, 2/21/2022, 12:21 AM

Apps

Assigned Apps

Settings that specify which apps are visible in the app menu

Assigned Connected Apps

Settings that specify which connected apps are visible in the app menu

Object Settings

Permissions to access objects and fields, and settings such as tab availability

Update Tab Setting as Available and Visible -> Save.

Permission Set

LogiSense Usage Dashboard

Find Settings...

Clone

Delete

Edit Properties

Manage Assignments

[Permission Set Overview](#) > [Object Settings](#) ▼ **Usage Dashboard** ▼

Usage Dashboard

Save

Cancel

Tab Settings

Available	Visible
☒	☒ i

Navigate to Visualforce Page Access and move the **LogiSense_Usage_Dashboard** to Enabled Visualforce Pages section -> Save

The screenshot shows the 'LogiSense Usage Dashboard' configuration page. At the top, there's a 'Permission Set' header with a search bar 'Find Settings...' and buttons for 'Clone', 'Edit Properties', and 'Manage Assignments'. Below this is a breadcrumb 'Permission Set Overview > Visualforce Page Access'. The main section is titled 'Visualforce Page Access' and contains two columns: 'Available Visualforce Pages' and 'Enabled Visualforce Pages'. The 'Available' column currently shows '--None--'. The 'Enabled' column shows 'UsageLogisense.LogiSense_Usage_Dashboard'. Between the columns are 'Add' and 'Remove' buttons. At the top right of the main section are 'Save' and 'Close' buttons.

Note: To grant access to the Dashboard, admin needs to complete below steps. (Admin can either assign permission set to user directly from user detail page or assign multiple users from permission set itself from setup)

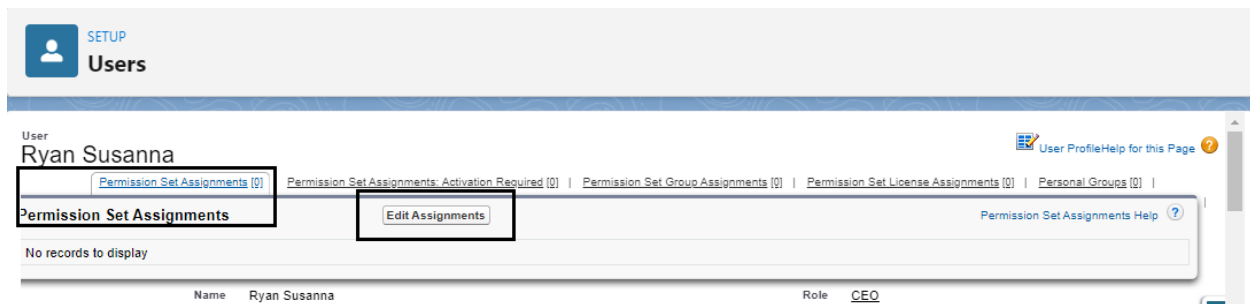
Option 1: Assign Permission Set to User

Navigate to Setup and Select Users

The screenshot shows the Salesforce Setup page. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar on the left contains 'user'. The left sidebar shows a list of setup items: 'Users' (highlighted), 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', and 'Users' (highlighted). The main content area is titled 'All Users' and includes a description: 'On this page you can create and manage users. In addition, download Salesforce user guides.' Below this is a 'View:' dropdown set to 'All Users'. At the bottom, there's a table with columns 'Action' and 'Full Name'. The table contains one row with an 'Edit' link and the text '20, 300'.

Select the user who needs access to the Dashboard.

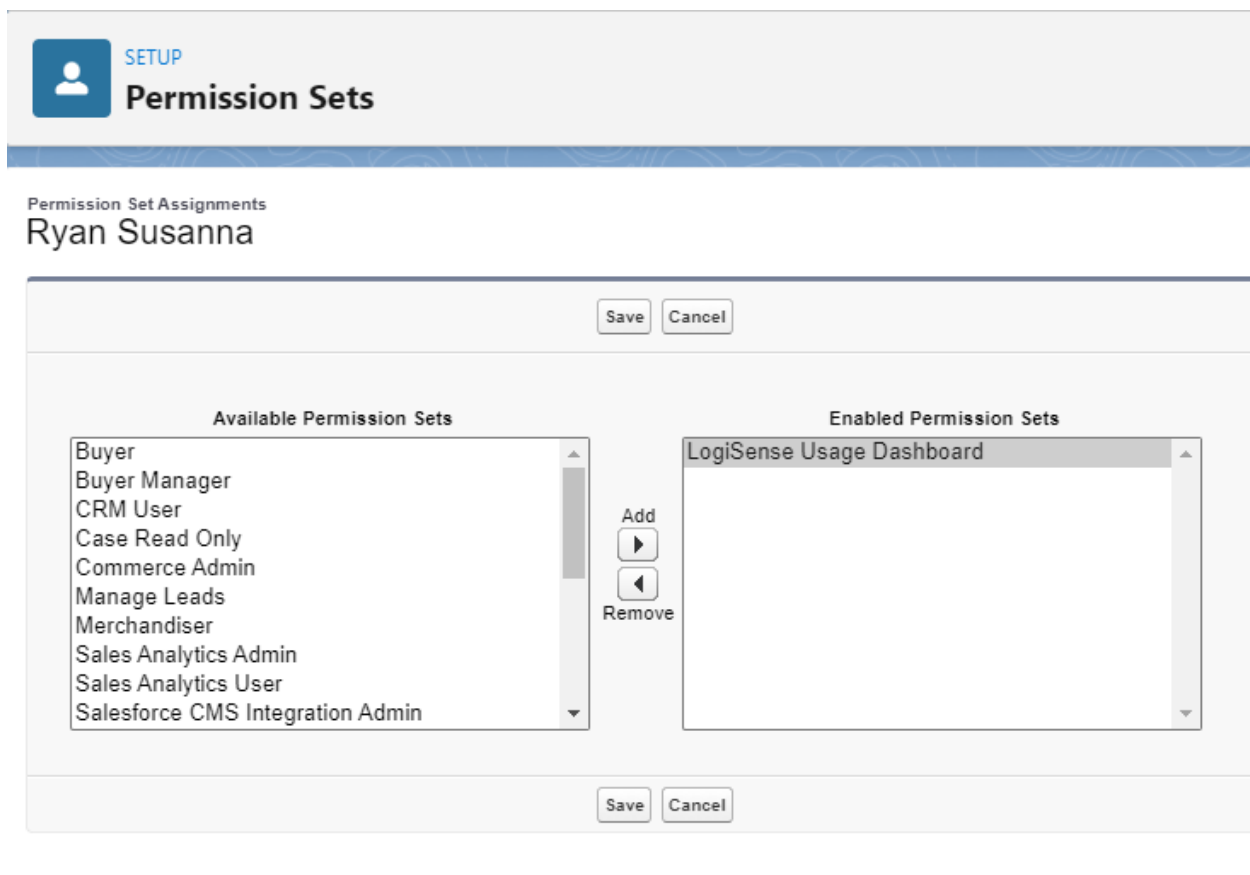
Open the User Detail page and click on Permission Set Assignments.



The screenshot shows the 'Users' section of a system. The user 'Ryan Susanna' is selected. The 'Permission Set Assignments' tab is active, showing a table with no records. The 'Edit Assignments' button is highlighted.

Name	Role
Ryan Susanna	CEO

Assign the **LogiSense Usage Dashboard** permission set and save.



The screenshot shows the 'Permission Set Assignments' page for 'Ryan Susanna'. The 'Available Permission Sets' list includes: Buyer, Buyer Manager, CRM User, Case Read Only, Commerce Admin, Manage Leads, Merchandiser, Sales Analytics Admin, Sales Analytics User, and Salesforce CMS Integration Admin. The 'Enabled Permission Sets' list includes: LogiSense Usage Dashboard. The 'Add' button is highlighted.

Available Permission Sets	Enabled Permission Sets
Buyer Buyer Manager CRM User Case Read Only Commerce Admin Manage Leads Merchandiser Sales Analytics Admin Sales Analytics User Salesforce CMS Integration Admin	LogiSense Usage Dashboard

Users with the permission set will now be able to access the Dashboard from their apps.

Option 2: Assign Users to Permission Set

Navigate to permission sets from setup and Select **LogiSense Usage Dashboard** permission set from the list

Setup Home Object Manager

Q Permission Sets

Users

Permission Sets

Didn't find what you're looking for? Try using Global Search.

SETUP
Permission Sets

Permission Sets

On this page you can create, view, and manage permission sets.
In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#) | [Android](#)

All Edit Delete Create New View

New

Permission Set Label + Description License

Del Clone LogiSense Usage Dashboard Allows access to LogiSense Usage Dashboard Tab

Select Manage Assignments

SETUP
Permission Sets

Permission Set
LogiSense Usage Dashboard

Find Settings... Clone Edit Properties Manage Assignments

Permission Set Overview

Description	Allows access to LogiSense Usage Dashboard Tab	API Name	LogiSense_Usage_Dashboard
License		Namespace Prefix	
Session Activation Required	☐	Created By	summer 20 2/21/2022, 12:21 AM
Last Modified By	summer 20 2/21/2022, 12:24 AM		

Select **Add Assignment** and Select the users you want to grant access to the dashboard and click Assign -> Done

Assignment Summary
LogiSense Usage Dashboard

Permission set LogiSense Usage Dashboard has been assigned to 1 user.

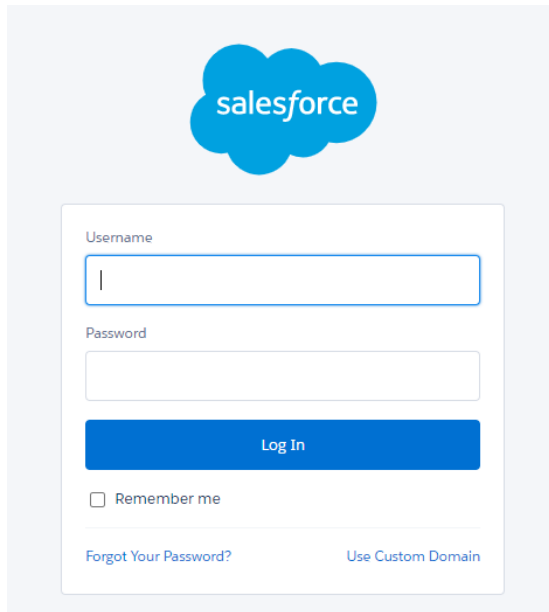
Done

Full Name	Username
Ryan Susanna	

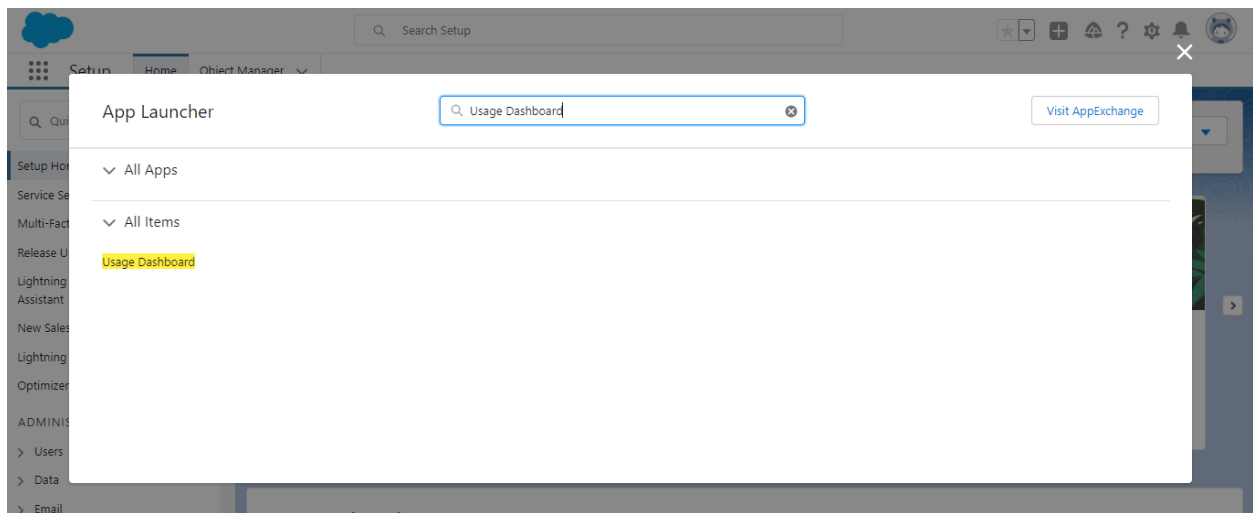
Done

Step 2: Steps for a User to View the Dashboard

Login to Salesforce Instance

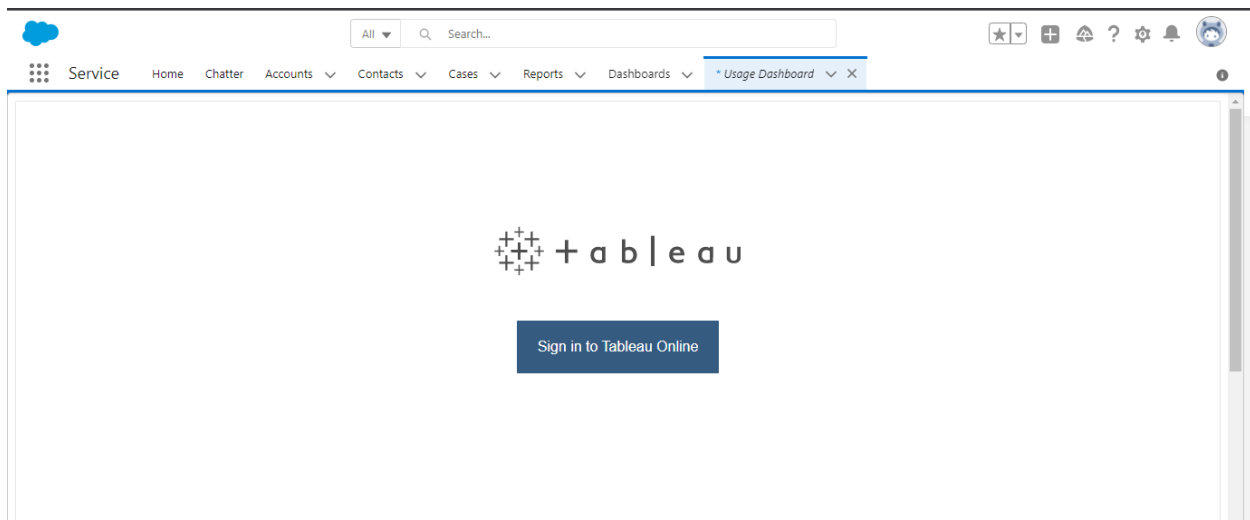


Navigate to App Launcher and Select **Usage Dashboard Tab** from App Launcher

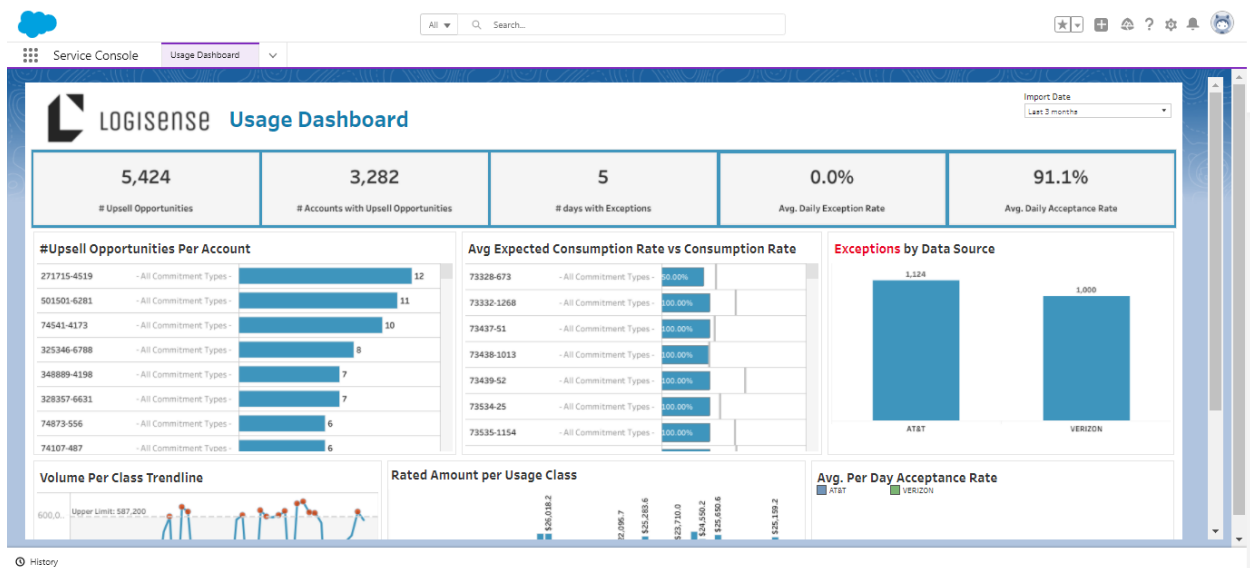


You will be prompted to login to **Tableau Online** for the first time. Please login using Tableau Online Credentials

(Note: if you select the remember password option, re-login is not required)



After Login, you will be re-directed to the Tableau Dashboard. Tableau filters can be used to filter the data as needed.



You can also add the Tab to Navigation menu in console app.

