

License Management and Support Guide

Salesforce, Summer '15




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LICENSE MANAGEMENT APP (LMA) OVERVIEW

The License Management App (LMA) helps developers and publishers apply licensing to their uploaded and registered AppExchange apps. Each time a customer or a prospective customer installs your managed package, a lead record and a license record are created in the LMA. By specifying defaults for the license records, you can apply licensing to control how many users in the customer organization can access your package, and for how long. Using the LMA, you can keep track of how many customers have installed a package and which version of the package they currently use. You can also use it to manage the leads associated with the licenses.

 **Note:** The LMA is available in English only.

The LMA is developed by Salesforce and is available to eligible partners. For more information on the Partner Program, including eligibility requirements, please visit us at www.salesforce.com/partners.

SEE ALSO:

- [Installing the LMA](#)
- [Configuring the LMA](#)
- [Integrating with Sales and Marketing](#)
- [Associating a Package with Your LMO](#)
- [Best Practices](#)
- [Troubleshooting](#)
- [Using the LMA](#)
- [License Management App FAQ](#)

Understanding License Management

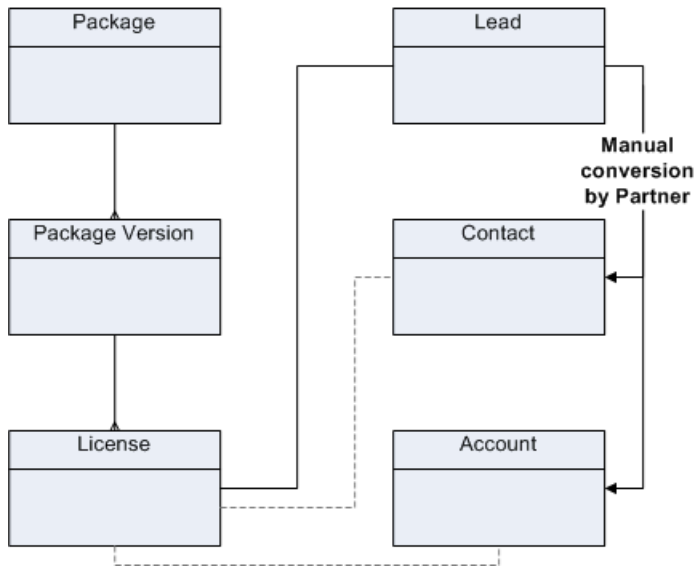
The license management process begins when someone installs an app from AppExchange. Salesforce automatically performs the following actions.

- Creates a license in the installer's organization. A copy of that license is stored in the Licenses tab of the LMA installed in your LMO.
- Updates the package version with the license information.
- Creates a lead with the installer's name, company, and email address. The lead source for installers is always *Package Installation*.

Use the LMA to manage licenses for managed packages. By modifying the license records, you can control how many users in the customer organization can access your package, and for how long.

Entity Relationship Diagram

The LMA has three custom objects that directly and indirectly relate to standard Salesforce objects. See the entity relationship diagram below to understand how the custom objects relate to other objects.



- The package object is the root object for all information in the LMA.
- Each package can have multiple package versions. Package version has a master-detail relationship with the package object.
- Each package version can have multiple licenses. License has a lookup relationship with the package version object.
- Each license has a direct relationship with a single lead. License has a lookup relationship with the lead object.
- The lead can be manually converted into an account and contact. When that happens, the license record is automatically associated with the converted account and contact records. License has a lookup relationship with the account and contact objects.

LMA Terminology

Apps

A collection of Salesforce components such as tabs, reports, dashboards, Apex classes and triggers, etc., that addresses a specific business need. You store an app in a package to upload it to AppExchange.

Developer

The developer of an app is the Salesforce user who created the app and its components. The developer of an app can be the same as or different from the [publisher](#).

Installer

The installer of an app is the person who installed the app from Force.com AppExchange into their Salesforce organization.

Lead Manager

The lead manager is the user responsible for following up on the leads that are automatically created when a managed package is installed. New leads are assigned to the license manager by default. The publisher (who owns the LMO) uses the lead manager to follow-up on customers who uninstall the managed packages.

License

An installation of a package by a Salesforce organization. Each license entry in the LMA represents an installation of a managed package.

License Manager

The license manager user is automatically created when an organization installs the LMA. A corresponding Package License Manager profile is also created. This user is the default owner for all packages managed using the LMA and all licenses created for those packages.

License Management Organization (LMO)

A license management organization is the Salesforce organization that you use to track all the Salesforce users who install your package. A license management organization must have the LMA installed. It automatically receives notification every time your package is installed or uninstalled so that you can easily notify users of upgrades.

Managed Package

Managed packages are packages that can be upgraded in the installer's organization. They differ from unmanaged packages in that some components are locked, allowing for the upgrade process.

Package

The container for an app and its components. In the LMA, the term package refers only to managed packages. A package may contain zero, one, or many apps.

Package License Manager

The Package License Manager profile gives a single user, the license manager, full access to the LMA. You cannot edit this profile or assign it to any other users.

Package Version

A specific version of a managed package. A new version is created when the developer uploads the updated package from a developer organization.

Publisher

The publisher of an app is the Salesforce user or organization that published the app on AppExchange. After registering their app, publishers are required to register using their contact information.

INSTALLING THE LMA

Before you install the LMA, you need to decide which organization is your License Management Organization (LMO). Because the LMA is an integral part of the sales, billing, and marketing of a managed package, putting the LMA in the wrong organization makes it difficult to manage licenses as a part of the sales and marketing process.

The LMA creates lead and license records when customers install a trial package. When they buy the package, those licenses are converted to paid licenses (either by site or based on a number of users). The LMA tracks who has installed a trial package, who is using it, how many licenses have been purchased, when it's up for renewal, etc. These are all important parts of the sales, billing, and marketing process ongoing in your production organization.

If you haven't already requested a CRM for ISV organization through the [Partner Community](#), do that now. CRM for ISVs is available to eligible partners. For more information on the Partner Program, including eligibility requirements, please visit us at www.salesforce.com/partners.



Note: If you have a Developer Edition organization that is being used to create a managed package, do *not* use this organization as your LMO.



Warning: Once you begin to manage a package license out of a specific LMO, you can't move those licenses, leads, and other information to another organization. Once you install the LMA, you cannot uninstall it. You must contact Salesforce Support if you want to uninstall the LMA.

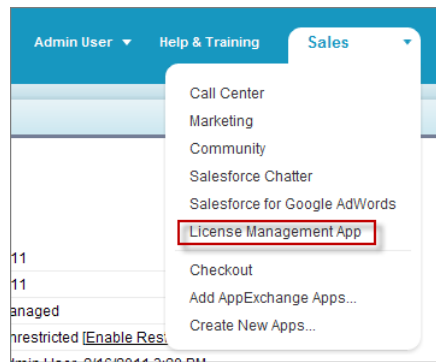
The LMA comes pre-installed with your ISV business organization. To install the LMA in a different organization, follow these steps.

1. File a case in the Partner Community under the **AppExchange and Feature Requests > License Management App** category.
2. Once the case is resolved, you will receive an email with an installation URL. Log in to the organization you plan to use as your LMO and click the LMA link in the email.
3. You can read the blurb about the app, then click **Get It Now**.
4. In the pop-up, choose **In my production Salesforce**.
5. Read and agree to the terms and conditions and then click **Install**.
6. Verify your password and then click **Submit**.
7. On the Package Installation Details page, click **Continue**.
8. Click **Next**, **Next**, and **Install**.

Click in the upper right corner and confirm you have the LMA installed.

Installing the LMA

License Management App



SEE ALSO:

[Configuring the LMA](#)

CONFIGURING THE LMA

After installing the LMA, configure it as follows.

1. **Assign a lead manager.** It is critical that a user in your organization is the owner of all lead records created as a result of package installations.
 2. Set the custom object permissions.
 - a. Licenses: most users in your organization do not need any permissions. Users who view licenses need the “Read” permission and users who modify license records need “Read” and “Edit” permissions.
 - b. Packages: only users who assign the lead manager need “Edit” permissions. Other users have either “Read” permissions or no permissions.
 - c. Package Versions: all users have “Read” permissions or no permissions, as there is no need to create, modify, or delete these records.
-
- Warning:**
- The licenses, packages, and package versions managed in the LMA are different from most records in that they are created automatically by AppExchange. For this reason, license, package, and package version records should not be modified or deleted.
 - Users with the System Administrator profile can create, modify, and delete records of all of these custom objects, as they have the “Modify All Data” permission.
3. Set field-level security in user profiles or permission sets.
 - a. Licenses: settings depend on how you want to manage these fields for different users in your organization.
 - b. Packages: make all fields `Read-Only`. If you want users to edit the `Lead Manager` field, you can make this field editable.
 - c. Package Versions: make all fields `Read-Only`.
 4. Override the standard **Edit** button on the license record to use the **Modify License** Visualforce page.
 5. Add related lists:
 - Add the Licenses related list to the appropriate Lead page layouts. License managers can use this list on the lead detail page to view the licenses associated with a particular lead.
 - Add the Licenses related list to the appropriate Account page layouts. Users can view this list and identify the licenses associated with a particular account.
 - Add the Licenses related list to the appropriate Contact page layouts. Users can view this list and identify the licenses associated with a particular contact.

USER PERMISSIONS

To configure the LMA:

- System Administrator profile

To edit licenses and packages:

- “Read”

AND

“Edit”

To view licenses, packages, and package versions:

- “Read”

ASSOCIATING A PACKAGE WITH YOUR LMO

To receive lead and license records from customer installs, you must associate your managed package with your [License Management Organization \(LMO\)](#), the Salesforce organization where the License Management App is installed.



Warning: Once you associate a package with an LMO, that package's leads and licenses must permanently be managed out of the LMO. You can't migrate licenses.

You can associate your managed package with your LMO on AppExchange.

1. Go to <http://www.appexchange.com>
2. Click the **Publishing** tab.
3. Enter the Developer Edition organization where you created the package.
4. Agree to the terms and conditions.
5. Fill in a brief profile; a name will suffice.
6. Click **Your Uploaded Packages** tab and find your package version.
7. Click the **Manage Licenses** link for the package version.
8. Click **Register**.
9. Specify the LMO by providing user credentials for that organization and specify the other default license parameters.
10. Click **Save**. It may take 30 minutes or longer for a package record to appear as associated with the LMO.



Note: All versions of a managed package are associated with the same LMO, therefore, the LMO is associated only once with the package.

License Defaults

1. Log in to the Partner Community.
2. On the Publishing page, click the **Packages** tab.
3. Click **Manage Licenses** next to the package that you want to register.
4. Click **Register**. Enter the login credentials for the organization where the LMA is installed. Usually, the organization is your partner business organization.
5. Select whether your default license is Free Trial or Active.
6. If you selected a free-trial license, enter the length of the trial, up to 90 days.
7. Enter the number of seats associated with your default license, or select **License is site-wide** to offer the license to all users in the installer's organization.
8. Click **Save**.

When a customer installs the package, these default values are used to set the `Status`, `Expiration Date`, and `Seats` fields on the license record in the LMA and in the installer's organization. If you want to update these values, you can modify this license record in the LMA.



Note: Default values are at the package version level, therefore, different versions of the same package may have different default values.

USING THE LMA

Use the License Management App (LMA) to apply licensing to your managed package to control how many users in the installer's organization can access your package and for how long. Every time your package is installed, a lead record is created in the LMA. You can use this information to contact the prospect and try to convert the lead to a customer, or to tell them about updates to your applications.

About Leads

When an installer installs a managed package, a lead is automatically created in the LMO. The lead contains the installer's name, company, and email address. The lead source defaults to `Package Installation`.

This information is important because it links the license to an actual Salesforce user that you can contact to notify about upgrades. If an installer uninstalls the package from his or her organization, a customer retention specialist for the developer's organization may want to contact the installer. Additionally, if there is an upgrade for a particular package, a license manager might want to mass email all installers with that package to let them know that an upgrade is available.

Each LMO should have a [lead manager](#) that is responsible for following up on all leads associated with licenses. When a new lead is created as a result of someone installing a package from AppExchange, the `Lead Owner` field on the lead record defaults to the [lead manager](#) specified for the package. If there is no lead manager specified for a package, the lead owner defaults to the `License Manager`.

EDITIONS

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To edit licenses and packages:

- "Read"

AND

"Edit"

To view licenses, packages, and package versions:

- "Read"


About Packages

Packages in the LMA refer to managed packages that have been uploaded to AppExchange. On AppExchange, these packages are referred to as apps, regardless of what components they contain. Each package has one or more package versions, for which there can be multiple licenses. A Developer Edition organization can only contain one managed package at a time, but an LMO can manage multiple packages from multiple developers.

Click the Packages tab to display all the packages that a user has recently viewed. To view all packages that the LMO manages, select `All` from the list view. You can click a package name to view details including release date, latest version, owner, and developer name.

Package Details

From the Packages tab, click a package name to view package details. The package detail page contains information on the package, as well as relevant related lists. In the Package Version related list, you can see all the uploaded and registered package versions on AppExchange. The package version object has a master-detail relationship with package object.


 **Important:** Do not edit, delete, clone, or create packages or package versions. Do not delete, clone, or create licenses. These records are automatically created and contain important information for tracking the licenses and packages in the License Management App. They cannot be repopulated.

Here are the attributes of a package.

Field	Description
Created By	Defaults to the License Manager user.
Developer Name	The package developer's organization name.
Developer Org ID	The 18-character ID of the package developer's organization.
Last Modified By	The name of the user that last modified this record, as well as the date and time the record was updated.
Latest Version	The most recent uploaded and registered version of the package. The developer enters this information when uploading the package.
Lead Manager	The LMO user that automatically becomes the owner of the leads created as a result of package installation. <code>Lead Manager</code> is blank when the package record is created. If you don't assign a lead manager, the License Manager user becomes the owner of the leads.
Owner	Defaults to the license manager user. You can transfer ownership at any time to any user in the organization by clicking Change next to the current owner's name.
Package ID	The 18-character GUID (Globally Unique ID) that identifies the package.
Package Name	The name of the package, as specified by the developer.
Release Date	The date the developer uploaded this package to AppExchange.

Editing Package Owners

The package owner automatically defaults to the [License Manager](#) user. You can change the owner of a package at any time, provided you have the appropriate permissions.

 **Note:** You can assign ownership to any user in your organization. Therefore, it is very important to ensure that the user to which you are transferring ownership has access to the LMA and the custom app, and has the appropriate user permissions.

To change the owner of a single package:

1. Click the Packages tab.
2. Select a package.
3. Click the **Change** link next to the owner.
4. Click the lookup icon and choose a new owner.
5. Optionally, check the **Send Notification Email** checkbox to email the current and new owners.
6. Click **Save**.

You can also transfer ownership for multiple packages to a single owner by viewing a specific package list view. To change the owner of more than one license:

1. Click the Packages tab.
2. Select a package list view.
3. Select the packages you want to change.
4. Click **Change Owner**.

USER PERMISSIONS

To edit licenses and packages:

- "Read"
- AND
- "Edit"

5. Click the lookup icon and choose a new owner.
6. Optionally, check the **Send Notification Email** checkbox to email the current and new owners.
7. Click **Save**.

Editing the Lead Manager for a Package

When a new lead is created as a result of someone installing a package from AppExchange, the `Lead Owner` field on the lead record defaults to the `lead manager` specified for the package. If there is no lead manager specified for a package, the lead owner defaults to the `License Manager`.

To assign or change the lead manager for a package.

1. Select a package from the Packages tab.
2. Click **Edit**.
3. Click the lookup icon next to the `Lead Manager` field to search for a user.
4. Select a user.
5. Click **Save**.

USER PERMISSIONS

To edit licenses and packages:

- "Read"
- AND
- "Edit"

About Package Versions

Package versions are specific uploads of a package. A package version may contain updated or additional objects, representing an upgrade of a package. A package may also have a new version if the package was originally uploaded as "Managed - Beta" but has been changed to "Managed - Released."

Licenses represent the package version a user has installed. All versions of a managed package are [associated with the same LMO](#). If you view the detail for a package version, you see a list of all licenses for installers that have installed that version.



Note: Do not edit, delete, clone, or create packages or package versions. Do not delete, clone, or create licenses. These records are automatically created and contain important information for tracking the licenses and packages in the License Management App. They cannot be repopulated.

Package Version Details

You can access the package version detail page by clicking the package version name in the Licenses, Packages, or Package Versions tabs. In the Licenses related list, you can see all the licenses associated with this package version. The license object has a lookup relationship with package version object.



Note: Do not edit, delete, clone, or create packages or package versions. Do not delete, clone, or create licenses. These records are automatically created and contain important information for tracking the licenses and packages in the License Management App. They cannot be repopulated.

Here are the attributes of a package version.

Field	Description
Beta	An early version of a managed package that is uploaded to AppExchange for a sampling of your intended audience to test it.
Created By	Defaults to the License Manager user.

Field	Description
Last Modified By	The name of the user that last modified this record, as well as the date and time the record was updated.
Package	The package for which this is a package version.
Package Version Name	The name of the package version, as specified by the developer during upload.
Release Date	The date this package version was uploaded to AppExchange by the developer.
Version	The version, as specified by the developer during upload to Force.com AppExchange.
Version ID	The 18-character ID of this package version.

About Licenses

When an app is installed, Salesforce creates a license entry in the LMA. This license is directly related to the version of the package that the installer has installed. Click the Licenses tab to display all licenses that a user has recently viewed. To view all licenses for the packages that the LMO manages, select **All** from the drop-down list and click **Go!**



Note: Do not edit, delete, clone, or create packages or package versions. Do not delete, clone, or create licenses. These records are automatically created and contain important information for tracking the licenses and packages in the License Management App. They cannot be repopulated.

License Details


From the License tab, you can click a license name to view details including status, package version, owner, and install date. Here are the attributes of a license.

Field	Description
Account	The account for a converted lead.
Contact	The contact for a converted lead.
Created By	Defaults to the License Manager user.
Expiration Date	Displays the expiration date or Does not expire if the license does not expire. The default value is Does not expire .
Information Current As Of	The last time Salesforce retrieved information about the installer's organization.
Install Date	The date the package version was initially installed by the installer.
Instance	The Salesforce instance where the installer's organization resides.
Last Modified By	The name of the user that last modified this record, as well as the date and time the record was updated.

Field	Description
Lead	<p>The lead that the LMA automatically created when the app was installed. This lead represents the user who owns the license.</p> <p>If the lead is converted into an opportunity, the lead name is retained but the lead record no longer exists. Therefore, if you click this link, a page displays indicating that the lead has been converted.</p>
License Name	Represents an instance of a license. The license name is an auto-number that increments by one for each new license.
Licensed Seats	A formula field that displays the number of licenses or <code>Site License</code> . The default value is <code>Site License</code> .
License Status	Indicates the type of license. Available values are <code>Trial</code> , <code>Active</code> , <code>Suspended</code> , and <code>Uninstalled</code> .
License Type	Indicates whether the license is editable.
Org Edition	The edition of the organization where the package is installed.
Org Expiration Date	If the installer is using a trial organization, the date when the trial expires.
Org Status	The status of the installer's organization. Possible values include <code>Trial</code> or <code>Active</code> .
Owner	Defaults to the license manager user. You can transfer ownership at any time to any user in the organization by clicking Change next to the current owner's name.
Package Version	Links to the detail page for the package version that is the parent of this license.
Package Version Number	The version number of the installed package.
Sandbox	If the license is for a package installed in a sandbox organization.
Subscriber Org ID	A globally unique 15-character ID representing the installer's organization.
Used Licenses	<p>Displays the number of users in an organization who have a license to a package. (Read only)</p> <p>This field is blank if:</p> <ul style="list-style-type: none"> • A customer uninstalled the package • <code>Licensed Seats</code> is set to <code>Site License</code>. This is because all users in an organization implicitly have a license to the package when <code>Licensed Seats</code> is set to <code>Site License</code>.

Editing License Owners

The license owner automatically defaults to the [License Manager](#) user. You can change the owner, provided you have the appropriate permissions. You can also transfer ownership for multiple licenses to a single owner by navigating to a specific license list view.

 **Note:** You can assign ownership to any user in your organization. Therefore, it is very important to ensure that the user to which you are transferring ownership has access to the LMA and the custom app, and has the appropriate user permissions.

To change the owner of a license:

1. Click the Licenses tab.
2. Select a license.
3. Click the **Change** link next to the owner.
4. Click the lookup icon and choose a new owner.
5. Optionally, check the **Send Notification Email** checkbox to email the current and new owners.
6. Click **Save**.


To change the owner of more than one license:

1. Click the Licenses tab.
2. Select a license list view.
3. Select the licenses you want to change.
4. Click **Change Owner**.
5. Click the lookup icon and choose a new owner.
6. Optionally, check the **Send Notification Email** checkbox to email the current and new owners.
7. Click **Save**.

Editing Licenses

You can modify licenses for each installer. To modify a license:

1. Click the Licenses tab.
2. Select the appropriate license.
3. Click **Modify License**.

 **Note:** If **Modify License** is not visible, check your page layout or contact your administrator.

4. Make the necessary changes to [editable fields](#).
5. Click **Save**.

Editable License Fields

You can modify the following License fields.

USER PERMISSIONS


To edit licenses and packages:

- "Read"
- AND
- "Edit"

USER PERMISSIONS

To edit licenses and packages:

- "Read"
- AND
- "Edit"

Field	Description
Expiration	Enter the expiration date to identify the last day the installer can access the package under the license agreement, or check Does not expire if the license does not expire.
Seats	Enter a positive number to set the number of licenses or check Site License to make the package available to all users in the installer's organization. The value defaults to Site License.
Status	<p>Use the drop-down list to set the license status. Available values are:</p> <ul style="list-style-type: none">• Trial: Set to Trial to allow the installer to try out the package for up to 90 days. Once a trial license is converted to an active license, it cannot return to a trial license.• Active: Set to Active to allow the installer to use your package according to your license agreement.• Suspended: Set to Suspended to prohibit the installer from accessing the package. You may want to set a package to Suspended if a user fails to pay for the license. <p> Note: When the installer uninstalls the package, the status is set to Uninstalled. The license manager cannot set or change this status. Once the package is uninstalled the license becomes read only and is no longer editable. The allowed status changes are:</p> <ul style="list-style-type: none">• Trial to Active• Active to Suspended• Suspended to Active

INTEGRATING WITH SALES AND MARKETING

You can use the information in the LMA to send notifications to your customers.



Warning: Do not create workflow rules, triggers, or validation rules that required custom fields on the license or lead objects. Do not impose any conditions on updating or creating license or lead records. Doing so will block creation of the license or lead records by the LMA, resulting in the loss of data concerning the packages installed by your customers.

Send upgrade notifications

Create an email template for notifying customers that an upgrade is available.

Send license expiration notifications

Create a workflow rule that automatically emails the sales representative or account manager before the license expires. To do this, create an email template for the notification. Then, create a workflow rule with a filter that specifies a time period (month) before the `Expiration` date. Finally, associate the workflow rule with a workflow alert that sends an email to the appropriate team member or sales representative. You should configure the rule so that your sales representative and the customer have sufficient time to explore contract renewal options before the license expires. It is also a good idea to send emails to customers warning them of license expiration.

Retain customers

Create a workflow rule that automatically emails a customer service representative or customer retention specialist when the package is no longer installed in that organization. To do this, create an email template for the notification. Then, create a workflow rule with a filter that specifies that the `License Status` equals "Uninstalled". Finally, associate the workflow rule with a workflow alert that sends an email to the appropriate team member or customer retention specialist.

Use the API to find licensed users

You can use the `isCurrentUserLicensed` method to determine if a user has a license to a managed package. For more information, see the *Apex Developer's Guide*.

BEST PRACTICES

Avoid mandatory fields

Do not create mandatory custom fields on lead, license, package and package version objects.

Avoid before-create triggers and validation rules

Don't define before-create triggers or validation rules on lead, license, package, or package version objects.

Use Custom Domains

When using Package Support Access to troubleshoot customer setup issues, you may be automatically logged out of your LMO. To avoid being logged out, use a custom domain for your LMO. For more information, see “My Domain Overview” in the Salesforce online help.

Make sure the lead user is a valid, active user

This is necessary for lead and license creation.

Track licenses

Create a lead list view filter for leads created by installed packages.

Set up history tracking for license fields.

Send license expiration notifications

Create a workflow rule that automatically emails the sales representative or account manager before the license expires. To do this, create an email template for the notification. Then, create a workflow rule with a filter that specifies a time period (for example, month) before the `Expiration` date. Finally, associate the workflow rule with a workflow alert that sends an email to the appropriate team member or sales representative. You should configure the rule so that your sales representative and the customer have sufficient time to explore contract renewal options before the license expires. It is also a good idea to send emails to customers warning them of license expiration.

Send upgrade notifications

Create an email template for notifying customers that an upgrade is available. The Leads tab in the LMA has a list of all customers.

Use the API to find licensed users

You can use the `isCurrentUserLicensed` method to determine if a user has a license to a managed package. For more information, see the [Force.com Apex Code Developer's Guide](#).

Retain customers

If a customer uninstalls a package, the status of the license in the LMO changes to Uninstalled. Create a workflow rule that automatically emails a customer service representative when the package is no longer installed in that organization. To do this, create an email template for the notification. Then, create a workflow rule with a filter that specifies that the `License Status` equals “Uninstalled”. Finally, associate the workflow rule with a workflow alert that sends an email to the appropriate team member or customer retention specialist.



Warning: Do not create workflow rules, triggers, or validation rules that require custom fields on the license or lead objects. Do not impose any conditions on updating or creating license or lead records. Doing so will block creation of the license or lead records by the LMA, resulting in the loss of data concerning the packages installed by your customers.

SEE ALSO:

[Troubleshooting](#)

[License Management App FAQ](#)

LICENSE MANAGEMENT APP FAQ

How do I change my License Management Organization?

Contact Salesforce support. License records in the current LMO don't move to the new LMO. They stay with the original LMO.

Why aren't Lead and License records being created in my LMO?

- Your LMO hasn't been associated with your package.
- Your package version hasn't been registered.
- There are mandatory custom fields in lead, license, package, and package version custom objects.
- The LMO Lead Manager (the lead records owner) is not a valid active user.
- The `before_` triggers are preventing lead creation.

For more possibilities, see [Troubleshooting](#).

Why can't I see the Modify License button?

Customize the page layout by adding the **Modify License** button to your page.

A customer installed my package before I associated it with my LMO. How can I manage the license record?

Ask the customer to install your package again without uninstalling it.

What happens when I decrease the number of licenses below the current number of licensed users?

All users still have access until a system administrator in the installer's organization revokes the extra licenses.

Why should I install the LMA into my production Salesforce organization?

The LMA is an important part of a partner's sales, billing, and marketing of a package on the Salesforce Platform. Installing it in a separate organization means they can't manage package licenses as a part of their sales and marketing process.

Installing the LMA into the customer's production organization means they can manage the lead, trial, licensing, and billing as part of their overall Salesforce dataset.

Can I automate the assignment of package licenses to users in the subscriber organization?

Yes, you can use the API to assign or revoke licenses for managed packages installed in your organization. For more information, see the [PackageLicense](#) and [UserPackageLicense](#) objects in the *SOAP API Developer's Guide*.

SEE ALSO:

[Troubleshooting](#)

TROUBLESHOOTING

The most frequent troubles arise from leads and licenses not being created or a proxy user being deactivated.

Leads and licenses are not being created

When a subscriber installs my package, leads or licenses are not being created in the LMO. Usually this is caused by a misconfiguration of the organization where the LMA is installed. Here is a list of things to check:

Did the subscriber really install the package?

AppExchange counts the installation when the user clicks "Get it now", but the installation may fail or be canceled and the license won't be delivered unless the installation was completed.

Is State and Country picklist validation enabled?

If so, try disabling it. There is a known issue that prevents leads from being created in the LMA if this feature is enabled. The issue occurs if subscribers haven't provided State and Country values in their user profiles, or those values are incorrect.

Is there a trigger on the lead or license object in the LMO?

There should never be a `before_create` or `before_update` trigger on a lead or license in the LMO. Try using `after_` triggers instead. Or try removing the trigger; if the trigger fails for some reason, it can block license creation.

Is there a required custom field on the lead or license record?

If so remove the requirement; the LMA doesn't populate that required field, so it can block license or lead creation.

Is the LMO Lead Manager user a valid, active user?

The Lead Manager (the owner of lead records) must be a valid, active user, if not, it will block license or lead creation.

Is there a validation rule on the lead or license record?

Often these will block creation of the LMA lead or license records because that required field is not there.

Is there a workflow rule on lead or licenses?

These might be preventing creation of the license. Try removing the workflow rule.

Was the lead converted to an account?

When leads are converted to accounts, they are no longer leads.



Note: Licenses that were not delivered to an LMO will usually be re-delivered after a few days if the issue is solved in the above steps.

A proxy user has deactivated

If a "proxy user has deactivated" message appears when editing a license in the LMO, a subscriber organization may be locked, deleted, or otherwise disabled. Check the following:

Verify the organization is active

Check with the organization administrator to see if the organization is active or deleted. If the organization is deleted, delete the corresponding license record.

Verify the package is installed

Check with the organization administrator to see if the package is still installed. If the organization is locked or the package no longer installed, the license may not be updated. Have the subscriber reinstall the package.

SEE ALSO:

[License Management App FAQ](#)

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