



License Management and Support Guide

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LICENSE MANAGEMENT APP

The License Management App (LMA) lets you manage leads and licenses for your AppExchange offerings. By integrating the LMA into your sales and marketing processes, you can better engage with prospects, retain existing customers, and grow your ISV business.

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

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

How Does the License Management App Work?

Each time a customer installs your packaged offering, the License Management App (LMA) creates lead and license records. To use the LMA effectively, it's important to understand how that process works.

Integrate the License Management App into Your Business Processes

Our most successful partners don't just use the License Management App (LMA) to manage leads and licenses. Instead, they integrate the LMA into their existing business processes and with other Salesforce tools. Here are some examples of how you can use the LMA to grow your business and retain customers.

Best Practices for the License Management App

Follow these guidelines and best practices when you use the License Management App (LMA).

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions

How Does the License Management App Work?

Each time a customer installs your packaged offering, the License Management App (LMA) creates lead and license records. To use the LMA effectively, it's important to understand how that process works.

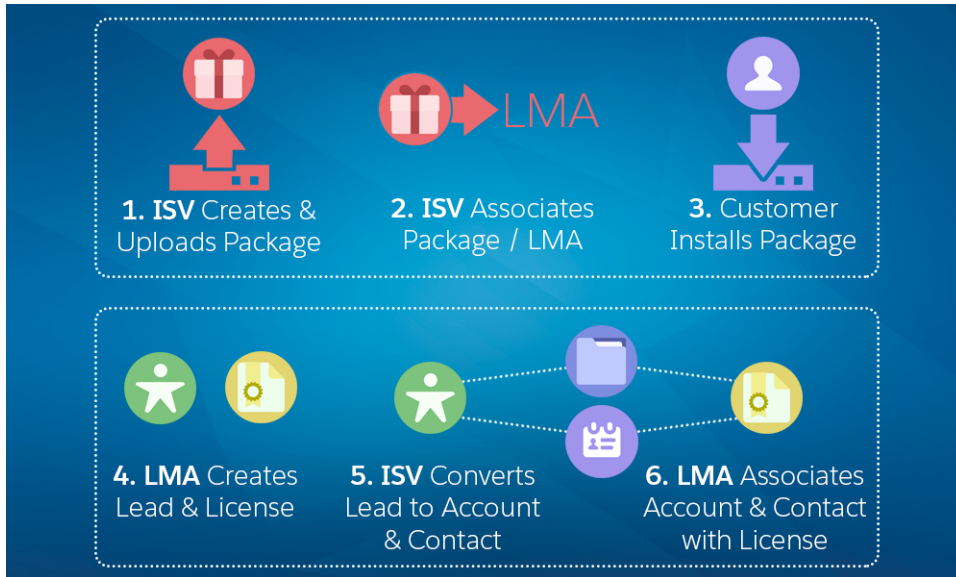
Packages, Leads, and Licenses

The key objects in the LMA are packages, leads, and licenses.

- *Packages* are container for apps or Lightning components and can be either managed or unmanaged. In the LMA, packages refer to managed packages that have been uploaded to AppExchange. Packages can have one or more versions, and each package version can have multiple licenses.
- *Leads* give you details about who installed your offering, such as the installer's name, company, and email address. Leads generated by the LMA are just like the ones you use elsewhere in Salesforce, except the lead source is Package Installation. When you set up the LMA, you designate a *lead manager* in your org to receive the new leads. You can manually convert leads into accounts and contacts in the LMA. The license is then associated with the converted account and contact.
- *Licenses* give you control over how many users in the customer's org can access your offering and for how long. Licenses are unique to the LMA, and each license has a direct relationship with a lead.

How Leads and Licenses Are Created

Lead and license records are the end result of a process that involves, you, the customer, and the LMA. Here's how the process unfolds, starting with the creation of your package.



Step	Who Does This	Where This Happens
[1] Your offering is packaged, and a version is uploaded to the AppExchange.	You (ISV partner)	Your Developer Edition org
[2] Your package version is associated with the LMA, and default license values are set.	You (ISV partner)	The Partner Community
[3] Your offering is installed as part of a purchase or trial.	Customer or prospect	Any compatible org
[4] A lead record is created with the customer’s name, company, and email address.	The LMA	Your business org
[4] License records are created according to the default values you specified.	The LMA	Your business org The customer’s org
[5] The lead record is converted to account and contact records.	You (ISV partner)	Your business org
[6] Account and contact records are associated with the license record.	The LMA	Your business org

[LMA Packages](#)

In the LMA, packages refer to managed packages that have been uploaded to the AppExchange for distribution. Packages can have one or more versions, and each package version can have multiple licenses. Package version has a master-detail relationship with a package. The package object is the root object for all information in the LMA.

[LMA Licenses](#)

Licenses give you control over how many users in the customer’s org can access your offering and for how long. Licenses are unique to the LMA, and each license has a direct relationship with a lead. Licenses have lookup relationships with leads and package versions.

LMA Packages

In the LMA, packages refer to managed packages that have been uploaded to the AppExchange for distribution. Packages can have one or more versions, and each package version can have multiple licenses. Package version has a master-detail relationship with a package. The package object is the root object for all information in the LMA.

In the LMA, from **Packages**, select a package name to view its details, including information about the org where you developed it. In the Package Version related list, you can see all the uploaded and registered package versions on the AppExchange

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

Package Details

A package contains the following information.

Field	Description
Created By	Defaults to the License Manager.
Developer Name	The name of the org where you developed the package.
Developer Org ID	The 18-character ID of the org where you developed the package.
Last Modified By	The name of the last user to modify this record, along with the date and time it was updated.
Latest Version	The most recent uploaded and registered version of the package. You enter this information when uploading the package.
Lead Manager	The owner of leads created when customers install your package. <code>Lead Manager</code> is blank when the package record is created. If you don't assign a lead manager, the License Management App owns the lead.
Owner	The License Management App. Don't change this value.
Package ID	The 18-character GUID (Globally Unique ID) that identifies the package.
Package Name	The name you specified when you created the package.
Release Date	The date you uploaded this package to the AppExchange.

Package Version Details

A package version contains the following information.


Field	Description
Beta	Indicates an early version of a managed package for testing by your customers. You specify beta status when you upload the package to the AppExchange
Created By	Defaults to the License Management App.
Last Modified By	The name of the last user to modify this record, along with the date and time it was updated.
Package	The package for which this is a package version.
Package Version Name	The name you specified when you created the package.
Release Date	The date you uploaded this package to the AppExchange.
Version	The version, as specified during upload to the AppExchange.

Field	Description
Version ID	The 18-character ID of this package version.

LMA Licenses

Licenses give you control over how many users in the customer's org can access your offering and for how long. Licenses are unique to the LMA, and each license has a direct relationship with a lead. Licenses have lookup relationships with leads and package versions.

In the LMA, from **Licenses**, select a license record to view details including status, package version, owner, and install date.

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

License Details

A license contains the following information.

Field	Description
Account	The account for a converted lead.
Contact	The contact for a converted lead.
Created By	Defaults to the License Manager.
Expiration Date	Displays the expiration date or <code>Does not expire</code> if the license does not expire. The default is <code>Does not expire</code> .
Information Current As Of	The last time Salesforce retrieved information about the installer's org.
Install Date	The date the customer installed this package version.
Instance	The Salesforce instance where the installer's org resides.
Last Modified By	The name of the last user to modify this record, along with the date and time it was updated.
Lead	The lead that the LMA created when the app was installed. A lead represents the user who owns the license. If you convert the lead into an opportunity, the lead name is retained but the lead record no longer exists. If you click the link, a page states that the lead has been converted.
License Name	A number that represents an instance of a license. The number is incremented by one for each new license.
Licensed Seats	Displays the number of licenses or <code>Site License</code> . The default 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 installer's org.
Org Expiration Date	If the installer is using a trial org, the date when the trial expires.

Field	Description
Org Status	The status of the installer's org. Possible values include Trial or Active.
Owner	Always the License Management App. Don't change this value.
Package Version	Links to the package version that is the parent of this license.
Package Version Number	The version number of the installed package.
Sandbox	Indicates whether the license is for a package installed in a sandbox org.
Subscriber Org ID	A globally unique 15-character ID representing the installer's org.
Used Licenses	Displays the number of users who have a license to the package. This field is blank if: <ul style="list-style-type: none"> • A customer uninstalled the package. • <code>Licensed Seats</code> is set to Site License.

Limits

You can allocate up to 99,000,000 seats per subscriber license.

Integrate the License Management App into Your Business Processes

Our most successful partners don't just use the License Management App (LMA) to manage leads and licenses. Instead, they integrate the LMA into their existing business processes and with other Salesforce tools. Here are some examples of how you can use the LMA to grow your business and retain customers.

EDITIONS

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Alert Sales Reps Before a License Expires

If you're managing licenses for several offerings, it can be difficult to keep track of what expires and when. If a license expires accidentally, you could even lose a customer. To help your customers with renewals, set up a workflow rule to email a sales rep on your team before the license expires.

To automatically email the sales rep, follow these high level steps.

1. Create an email template for the notification.
2. Create a workflow rule with a filter that specifies enough time before the expiration date to discuss renewal options.
3. Associate the workflow rule with a workflow alert that sends an email to the appropriate team member or sales rep.

Notify Customer-Retention Specialists When an Offering Is Uninstalled

If a customer uninstalls your offering, find out why. By speaking to the customer, you have an opportunity to restore the business relationship or receive feedback that helps you improve your offering.

To notify a customer-retention specialist on your team, follow these high level steps.

1. Create an email template for the notification.

2. Create a workflow rule with a filter that specifies that the `License Status` equals `Uninstalled`.
3. Associate the workflow rule with a workflow alert that sends an email to the retention specialist.

Best Practices for the License Management App

Follow these guidelines and best practices when you use the License Management App (LMA).

- Set up My Domain in the Salesforce org where the LMA is installed. A custom domain prevents you from being logged out of your org when you use the Subscriber Support Console to help customers troubleshoot issues. For more information, see “My Domain” in the Salesforce online help.
- Create a list view filter for leads created by installed packages. The filter helps your team separate subscriber-based leads from leads coming from other sources.
- Use the API to find licensed users. The `isCurrentUserLicensed` method determines if a user has a license to a managed package. For more information, see the [Force.com Apex Code Developer's Guide](#).
- Don't create workflow rules, triggers, or validation rules that require custom fields on the license or lead objects. Likewise, don't impose conditions on updating or creating license or lead records. These kinds of customizations prevent the LMA from working.
- Don't create required custom fields on lead, license, package and package version objects.
- Don't define `before-create` triggers or validation rules on lead, license, package, or package version objects.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions

GET STARTED WITH THE LICENSE MANAGEMENT APP

To start managing leads and licenses with the License Management App (LMA), install the LMA in your Salesforce org. Then associate at least one package that you've uploaded to the AppExchange and configure the LMA.

[Install the License Management App](#)

Install the License Management App (LMA) in the production Salesforce environment where you manage sales, billing, and marketing at your company. If you received a Partner Business Org when you joined the Partner Program, the LMA is pre-installed there, so you can skip this step.

[Associate a Package with the License Management App](#)

To receive lead and license records for an offering, you associate a package with the Salesforce org in which the License Management App (LMA) is installed. Before you associate a package with the LMA, upload the package to the AppExchange. You can only manage licenses for managed packages.

[Configure the License Management App](#)

After you associate a managed package with the LMA, assign a lead manager and set object permissions so that people on your team can use the LMA.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions

Install the License Management App

Install the License Management App (LMA) in the production Salesforce environment where you manage sales, billing, and marketing at your company. If you received a Partner Business Org when you joined the Partner Program, the LMA is pre-installed there, so you can skip this step.

 **Important:** Don't install the LMA in the Developer Edition org where you created a managed package.

1. Log in to the Partner Community requesting the LMA.
 - a. Log in to the [Partner Community](#) and go to the Support tab.
 - b. Select **New Case**.
 - c. Select **License Management Application**, and then select **Create a Case**.
 - d. For Subtopic, select **Request LMA**.
 - e. Enter the required information in the `Description` field, and then select **Submit Case**.
After Partner Operations reviews the case, you receive an email with an installation URL.
2. Log in to the org where you want to install the LMA, and then select the installation URL.
3. Choose which users can access the LMA, and then select **Install**.
4. Confirm that you have installed the LMA by opening the app launcher in Lightning Experience or app menu in Salesforce Classic. If the installation was successful, License Management App appears in the list of available apps.


USER PERMISSIONS

To install packages:

- "Download AppExchange Packages"

Associate a Package with the License Management App

To receive lead and license records for an offering, you associate a package with the Salesforce org in which the License Management App (LMA) is installed. Before you associate a package with the LMA, upload the package to the AppExchange. You can only manage licenses for managed packages.

1. Log in to the [Partner Community](#) and go to the Publishing tab.
2.  **Note:** If you've already linked your packaging org, you can skip this step.

Connect your packaging org to the publishing console.

- a. On the Organizations tab, select **Connect Organization**.
 - b. Enter the login credentials for the org in which you created the package, and then select **Submit**.
3. Associate your package with the LMA.
 - a. On the Packages tab, select the package you want to associate with the LMA, and then select **Manage Licenses**.
 - b. Select **Register**.
 - c. Enter the login credentials for the org in which the LMA is installed, and then select **Submit**.
 - d. Choose default license values for your offering, and then select **Save**.
It can take 30 minutes or more to associate a package record with the LMA.

You associate a managed package with the LMA only once. After a package is associated, the new versions that you create are automatically linked to the LMA.


USER PERMISSIONS

- To manage licenses in the Partner Community:
- "Manage Listings"

Configure the License Management App

After you associate a managed package with the LMA, assign a lead manager and set object permissions so that people on your team can use the LMA.

1. Assign a lead manager. If you don't assign a lead manager, you don't receive the lead records that are created when customers install your offering.
 - a. Select a package in the LMA.
 - b. Select **Edit**.
 - c. For Lead Manager, search for a user. In most cases, the lead manager is someone from your sales team.
 - d. Select **Save**.
2. Set custom object permissions.

 **Note:** Users with the System Administrator profile can create, modify, and delete these objects by default because they have the "Modify All Data" permission.

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"

Licenses	Most users in your org don't need any permissions. Users who view licenses need the "Read" permission. Users who modify license records need "Read" and "Edit" permissions.
Packages	Only users who assign the lead manager need "Edit" permission. Other users have either "Read" permission or no permissions.

Package Versions	All users have "Read" permission or no permissions, because they don't need to create, modify, or delete these records.
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3. Set field-level security in user profiles or permission sets.

Licenses	Your settings depend on how you want to manage these fields for different users in your org.
Packages	Make all fields Read-Only.
Package Versions	Make all fields Read-Only.

4. To use the `Modify License` Visualforce page, override the Edit control on the license record.

5. Add related lists.

- Add the Licenses related list to the appropriate Lead page layouts. License managers can use this list 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.

MANAGE LEADS AND LICENSES FOR YOUR OFFERING

After you configure the LMA, you can change lead manager, modify license records, and refresh licenses.

[Modify a License Record in the License Management App](#)

You can change a customer's access to your offering by modifying a license record. For example, increase or decrease the number of seats included with a license or change the expiration date.

[Change the Lead Manager in the License Management App](#)

You can change who receives leads created when a customer or prospect installs your offering from the AppExchange. Usually, the lead manager is someone from your sales team. When new leads are created in the License Management App (LMA), the `Lead Owner` field on lead records defaults to the package's lead manager. If you haven't specified a lead manager, the lead owner defaults to the LMA.

[Refresh Licenses for an Offering in the License Management App](#)

Refresh licenses to sync license records for a package across all customer installations. Consider refreshing licenses if discrepancies appear between the number of licenses in a customer's org and the License Management App (LMA) or if you installed the LMA in a new org.

[Move the License Management App to Another Salesforce Org](#)

By default, the License Management App (LMA) is installed in your Partner Business Org (PBO). Salesforce strongly recommends managing licenses from your PBO. However, if your company chooses to use another org for ISV business processes, you can install the LMA in that org.

EDITIONS


Available in: both Salesforce Classic and Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions

Modify a License Record in the License Management App

You can change a customer's access to your offering by modifying a license record. For example, increase or decrease the number of seats included with a license or change the expiration date.

1. Go to a license record in the License Management App (LMA).
2. Select **Modify License**. If you don't see **Modify License**, edit the page layout to add the control.

 **Warning:** In Salesforce Classic and Lightning Experience, sometimes the license detail page includes an **Edit** control. Don't use this control—use **Modify License** instead.

3. Update field values as needed.

USER PERMISSIONS


To edit licenses and packages:

- "Read"

AND

"Edit"

Field	Description
Expiration	Enter the last day that the customer can access your offering, or select Does not expire if the license doesn't expire.
Seats	Enter the number of licensed seats, or select Site License to make your offering available to all users in the customer's org. You can allocate up to 99,000,000 seats.

Field	Description
Status	<p>Select a value from the drop-down list.</p> <ul style="list-style-type: none"> • Trial—Allows the customer to try your offering for up to 90 days. After the trial license converts to an active license, it cannot return to a trial state. • Active—Allows the customer to use your offering according to the license agreement. • Suspended—Prohibits the customer from accessing your offering. <p> Note: When your offering is uninstalled, its status is set to Uninstalled, and the license can't be edited.</p>

4. Select **Save**.

Change the Lead Manager in the License Management App

You can change who receives leads created when a customer or prospect installs your offering from the AppExchange. Usually, the lead manager is someone from your sales team. When new leads are created in the License Management App (LMA), the `Lead Owner` field on lead records defaults to the package's lead manager. If you haven't specified a lead manager, the lead owner defaults to the LMA.

1. Go to a package in the LMA. If you don't see any packages, check your list view.
2. Select **Edit**, and then locate a user. Make sure that you're selecting someone who has permission to access license records in the LMA.
3. Select **Save**.

USER PERMISSIONS

To edit licenses and packages:

- "Read"
- AND
- "Edit"

Refresh Licenses for an Offering in the License Management App

Refresh licenses to sync license records for a package across all customer installations. Consider refreshing licenses if discrepancies appear between the number of licenses in a customer's org and the License Management App (LMA) or if you installed the LMA in a new org.

 **Note:** You can refresh licenses for a package once per week.

1. Go to a package record in the LMA. If you don't see any packages, check your list view.
2. Select **Refresh Licenses**. In Lightning Experience, you might need to select the drop-down list to see this control.
3. Confirm that you want to refresh licenses for this package, and then select **Refresh Licenses** again.

USER PERMISSIONS

To edit licenses and packages:

- "Read"
- AND
- "Edit"

Move the License Management App to Another Salesforce Org

By default, the License Management App (LMA) is installed in your Partner Business Org (PBO). Salesforce strongly recommends managing licenses from your PBO. However, if your company chooses to use another org for ISV business processes, you can install the LMA in that org.

ⓘ Important: When you move the LMA to a new org, you must manually re-associate your packages and refresh the licenses. Your package and license records don't move to the new org.

1. Log a case to break the association between the LMA and the org where it's currently installed.
 - a. Log in to the [Partner Community](#) and go to the Support tab.
 - b. Select **New Case**.
 - c. Select **License Management Application**, and then select **Create a Case**.
 - d. For Subtopic, select **Other**.
 - e. Enter the required information in the `Description` field, and then select **Submit Case**.
2. [Install the LMA in the new org](#) on page 7.
3. [Associate your packages with the new org](#) on page 8.
4. [Refresh licenses for your packages](#) on page 11.

USER PERMISSIONS

To install packages:

- "Download AppExchange Packages"

To manage licenses in the Partner Community:

- "Manage Listings"

To edit licenses and packages:

- "Read"

AND

"Edit"

TROUBLESHOOT THE LICENSE MANAGEMENT APP

The most frequent problems arise when leads and licenses aren't created or a proxy user is deactivated.

[Leads and Licenses Aren't Being Created](#)

When a customer installs your package, leads or licenses are created. If they aren't, check the configuration in the org in which the LMA is installed. If you resolve the issue with one of these recommendations, the licenses usually appear in the LMA after a few days.

[Proxy User Has Deactivated Message](#)

If a "proxy user has deactivated" message appears when editing a license in the LMA, a subscriber org could be locked, deleted, or disabled. Here's a list of things to check.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions

Leads and Licenses Aren't Being Created

When a customer installs your package, leads or licenses are created. If they aren't, check the configuration in the org in which the LMA is installed. If you resolve the issue with one of these recommendations, the licenses usually appear in the LMA after a few days.

Did the customer really install the package?

When a customer selects **Get it Now** on your AppExchange listing, Salesforce counts this as an installation. However, the customer can cancel the installation before it completed, or the installation could have failed. If the installation doesn't finish, a license doesn't appear in the LMA.

Is State and Country picklist validation enabled?

If it is enabled, try disabling it. A known issue prevents leads from being created in the LMA if this feature is enabled. The issue occurs if customers haven't provided state and country values in their user profiles, or those values are incorrect.

Does the lead or license object have a trigger?

Don't use `before_create` or `before_update` triggers on leads and licenses in the LMA. Instead, use `after_` triggers, or remove all triggers. If a trigger fails, it can block license creation.

Does the lead or license record have a required custom field?

If yes, remove the requirement. The LMA doesn't populate required custom field, so it can prevent licenses or leads from being created.

Is the lead manager a valid, active user?

If not, the LMA can't create leads and licenses.

Does the lead or license record have a validation rule?

Validation rules often block the creation of LMA lead or license records because the required field isn't there.

Does the lead or license have a workflow rule?

Workflow rules sometimes prevent leads and licenses from being created. Remove the workflow rule.

Was the lead converted to an account?

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

Proxy User Has Deactivated Message

If a “proxy user has deactivated” message appears when editing a license in the LMA, a subscriber org could be locked, deleted, or disabled. Here’s a list of things to check.

Is the org active?

Check to see if the customer deleted the org. If the org has been deleted, delete the corresponding license record.

Has the package been installed?

If the org is locked or the package has been uninstalled, the license record can’t be updated. Ask the customer to reinstall the package.

LICENSE MANAGEMENT APP FAQ

Answers to common questions about the License Management App (LMA).

[Is the LMA compatible with Lightning Experience?](#)

[Can I install the LMA in a non-production Salesforce org?](#)

[Why can't I see the Modify License button on my license records?](#)

[A customer installed my package before I associated it with the LMA. How can I manage the license record?](#)

[Can I automate the assignment of licenses to users in the subscriber org?](#)

[Why aren't leads and licenses being created in the LMA?](#)

[What happens when I decrease the number of available licenses below the current number of licensed users?](#)

EDITIONS

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Is the LMA compatible with Lightning Experience?

Yes, both Salesforce Classic and Lightning Experience support the LMA.

Can I install the LMA in a non-production Salesforce org?

By default, the LMA is installed in your Partner Business Org, a production environment that includes the ISV tools needed to run your business. When the LMA is part of a production environment, you can fully integrate license management into your sales, billing, and marketing processes. Our most successful partners make use of the LMA in their production orgs.

Additionally, some types of non-production environments, such as trial orgs, eventually expire. If this happens, your mission critical data becomes temporarily inaccessible. For these reasons, Salesforce strongly discourages moving the LMA to a non-production org.

Why can't I see the **Modify License** button on my license records?

You must add the Modify License button to the layout of your license detail page.

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

Go to the package's detail page in the LMA, and then select **Refresh Licenses**. A license record for this customer now appears.

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

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

Why aren't leads and licenses being created in the LMA?

Common reasons why leads and licenses aren't created in the LMA include:

- You haven't associated the package or package version with the LMA.
- Lead, license, package, or package version custom objects have mandatory custom fields. Try removing the mandatory custom fields.
- The lead manager is not a valid, active user.
- `before_` triggers are preventing lead creation. Try removing the triggers, or use `after_` triggers instead.

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

Users in the customer's org who already have access to your offering continue to have access. Their system administrator must manually revoke the extra licenses. Until the admin revokes access, the license count remains negative.