Nuvovis

Software License Manager

for Salesforce

Installation Guide

November 2018

Introduction

The Nuvovis Software License Manager is run as an App within a Salesforce environment. This document takes you through a step-by-step guide for the installation of License Manager. Once you have installed License Manager you can follow the Getting Started Guide document to take your first steps in using the system.

License Manager Installation

If you are not already a Salesforce user then to use License Manager you need to sign up for a Salesforce environment that can host Apps. Browse to http://www.salesforce.com and click on the **Free Trial** link. This will provide you with the full Salesforce CRM system (free for 30 days).

Click on the **Get it Now** link from the License Manager listing on the Salesforce AppExchange: http://appexchange.salesforce.com/listingDetail?listingId=a0N30000007q7gWEAQ

When you have followed the License Manager installation link and logged on you will be presented with the Package Installation screen shown below. Install for Admins Only using the **Install** button.
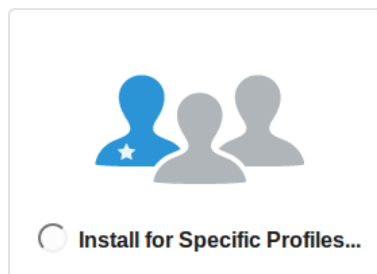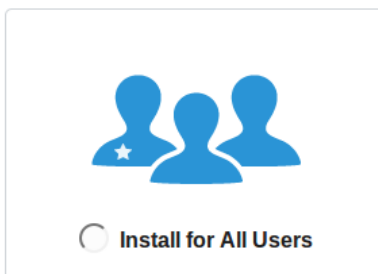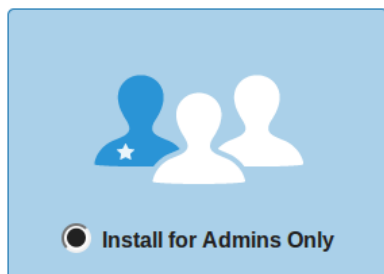
When you click on the **Install** button you will be prompted to approve access to the Nuvovis

web services. The License Manager GUI needs to access the cloud servers to function.
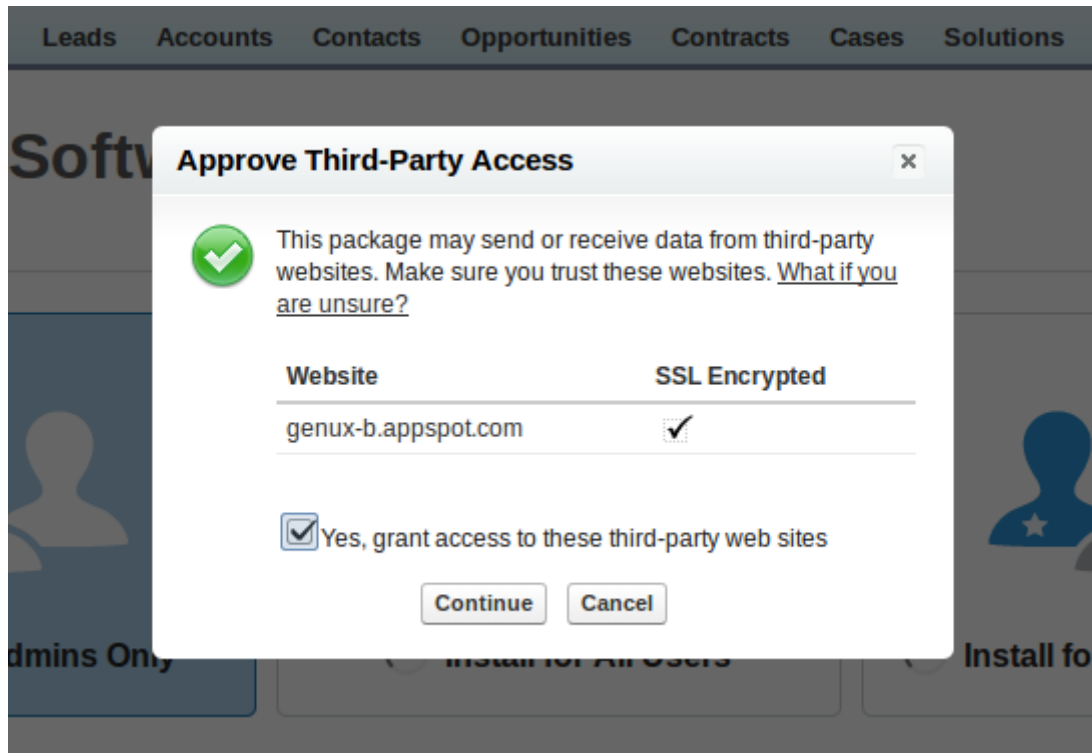
Click on the **Yes** checkbox and the **Continue** button.

License Manager Configuration

You can adjust exiting user profiles to use License Manager but for this example we will create a new user profile called Licensing User to use the License Manager application within Salesforce. Go to **Administration Setup – Manage Users – Profiles** and click on the **New Profile** button.

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

| | | ❚ = Required Information |

Existing Profile ❚ Standard User

User License Salesforce

Profile Name ❚ Licensing User

Save   Cancel

We will base the Licensing User profile on the Standard User profile. Select Standard User in the **Existing Profile** drop-down list, type Licensing User in the **Profile Name** field and click on the **Save** button. Once saved click on the **Edit** button so that we can change the new user profile to use License Manager.

Make the License Manager App the default for the Licensing users and enable Genux-B:

Custom App Settings

	Visible	Default		Visible	Default
App Launcher	☐	○	Marketing	☐	○
Call Center	☐	○	Sales	☐	○
Community	☐	○	Salesforce Chatter	☐	○
Force.com	☐	○	Sample Console	☐	○
Licensing	☑	◉	Site.com	☐	○

Connected App Access

GenuxB   ☑

Make the License Manager custom tabs visible to Licensing users (Service Status is not used):

Custom Tab Settings

Control Panel	Default On		Software Licenses	Default On
Service Status	Tab Hidden		Start Here	Default On

The rest of the profile settings can be left set to their defaults. Click on the **Save** button to update the Licensing User profile.

Next we create a new user with the Licensing User profile. Go to **Administration Setup – Manage Users – Users** and click on the **New User** button.

User Edit
Bob Test

User Edit   [Save] [Save & New] [Cancel]

General Information

First Name	Bob	Role	<None Specified>
Last Name	Test	User License	Salesforce
Alias	btest	Profile	Licensing User
Email	colin@company.com	Active	☑
Username	bobtest@company.com	Marketing User	☐
Community Nickname	bob	Offline User	☐
Title		Knowledge User	☐
Company		Force.com Flow User	☐
Department		Service Cloud User	☐
Division		Siteforce Contributor User	☐

Specify the email address of the user who is going to use the system as a Licensing User. Note that you need to specify a valid email address to receive a link from Salesforce to enable the new user to login and set their password. If the new user account is for the same individual as the System Administrator carrying out the installation use the correct email address but specify a new Username for the new role for that user (e.g. licadmin@mycompany.com). Although the Username is in the format of an email address it does not have to be a valid email address.

Select Salesforce as the User License, select Licensing User as the Profile and click on the **Save** button.

Now we need to assign the licensing Permission Set to the new user to ensure that the user has all the correct object and field level permissions. Click on the User Name to open the user detail view for the user, scroll down to the **Permission Set Assignments** section and click on the **Edit Assignments** button.
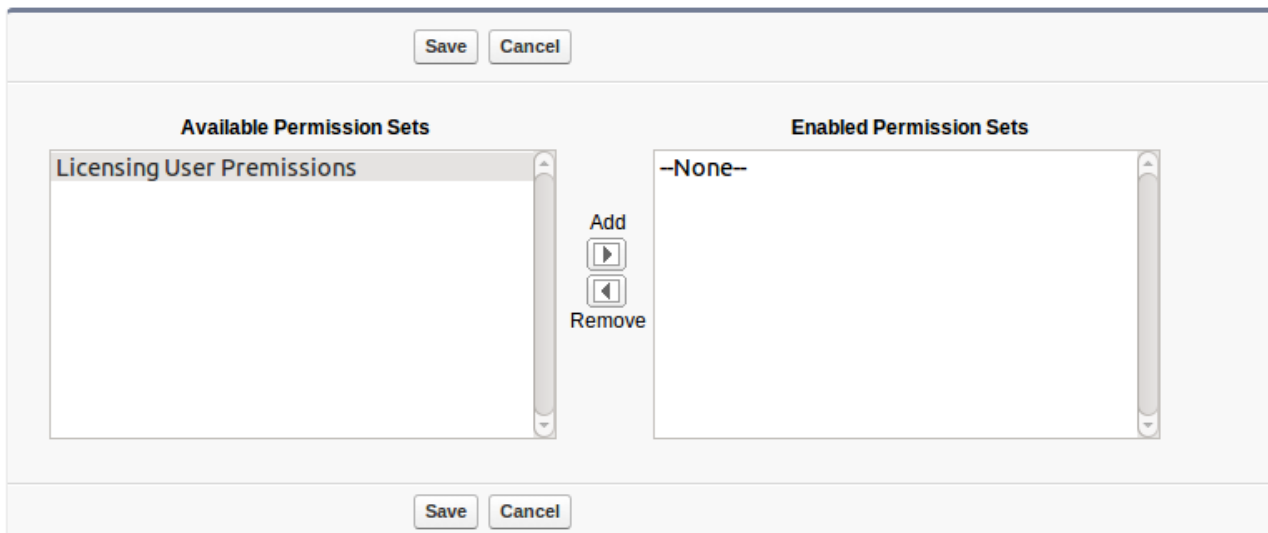
Select the Licensing User Permissions and click on the **Add** button to move it into the list of Enabled Permission Sets. Click on the **Save** button to apply the permissions.

Now you can login using the newly created user and use the License Manager App. Follow the instructions in the Getting Started document.