

CHOOSING THE RIGHT LICENCES



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► Salesforce Licences can be confusing

Salesforce is, unashamedly, a premium price product. However, managing your licences correctly can make a huge difference to your budget. This can often be a confusing exercise. This document is intended to assist you in correct licence management for efficient budgeting.



Simply put,

You cannot mix Essential, Professional, Enterprise or Unlimited licences
Once you have 1 Enterprise or Unlimited licence there are cheaper options for other users.

*(*Salesforce changes licence structure regularly - contact us for a chat as this data is subject to change.)*

In detail,

Sales Cloud and Service Cloud come with

Essential, Professional, Enterprise and Unlimited plans

Each incremental upgrade activates new features which can be seen here:

Sales Cloud

Service Cloud

It is also possible to buy **combined licences**

However, not everybody may need Sales Cloud and Service Cloud.

If you have staff not involved in Sales or Service functions but simply want access to customer high level data OR data from an AppExchange product there are cheaper options for them.



Users with this licence cannot see leads or opportunities, but can see account and contact data. They are able to use ALL custom objects so if you install an app from the app exchange, eg. Mission Control for project management, Employee App users can manage your projects.

To enable Employee Apps you must have an Enterprise or Unlimited Edition Sales or Service Cloud Licence.

There are also Free and Paid Chatter licences available, but these aren't quite as useful.

EXTERNAL LICENCES

Community Licences

for partners and customers.

Generally speaking:

- If there is a low volume of users and they are going to login frequently per week/month it is recommended to choose a named user function.
- If there is a high volume of users and they are going to login infrequently it is recommended to choose a per login price package.
- If there is a high Volume of users logging in frequently it is best to look at using Heroku to build a service for them,

Partner and Customer Community licences are available on a per login or named user basis.

Partner Licences

are available for you to collaborate with business partners so they can access the same data platform.

Who qualifies for a Partner Licence?

- 3rd Party Business Partners
- Contractors/Sub-Contractors.

If you outsource any of your business functions and users are NOT actual employees they can make use of a Partner Licence.

Customer Community Licences

These are available for Customers to login and access their data stored in Salesforce. Customer community licences are suitable for customer support or membership functionality as they don't give access to opportunity data but it is possible to customise a solution which would allow customers to make purchases.