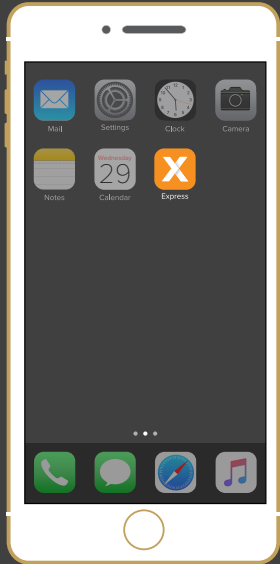


LICENSES FOR EXPRESS

THE EXPRESS APP



Xactly Express is an app on the Salesforce platform.

If Salesforce is thought of as a smart phone and Express is an app on that smart phone, in order to get access to the app for all users in a company, the company must:

1. Purchased a smart phone for each user
2. Pay for a mobile contract per user
3. Download app(s) needed per smart phone, per user

Similarly, in order to get access to Express, a company must have purchased Salesforce (the smart phone), pay for an Xactly license (the mobile contract) and download Express (the app). From there, the company can decide to give out the smart phones to all users, or hold onto the phones until a later date.

It is important to note:

1. Purchasing one license with Xactly includes **one Salesforce Platform License** and **one Express License**.
2. Xactly does not allow the purchasing of a combination of Express Seats vs Express Licenses vs Salesforce Platform/Standard Salesforce License.
3. Both licenses are provided when purchasing one license. **One license (both Salesforce and Express/Express Seat) per user.**
4. The purchasing of an additional Standard Salesforce License must be completed with Salesforce Support.
5. Xactly provides each company one Standard Salesforce License.
6. There must be at least one Salesforce System Admin at all times per company.

OVERVIEW



It is as if you and your friends want to go see a 3D movie. To get into the movie, you must first buy a ticket. One ticket per person. This allows you access into the movie theater.

Salesforce is this movie theater and each user needs to have a Salesforce license (either standard or platform) in order to get into the theater.



Now that you have purchased your ticket into the theater. To view this specialized 3D movie, you must be given a pair of 3D glasses. A user can sit in the theater without the glasses, but their experience will be limited.

Just having a License in Express does not allow a user to view details on the dashboard. It allows users see the Express tab in their Salesforce header, but no other details are provided when they click on that tab.



You have your ticket, your 3D glasses, and now you can take a seat in the theater and can enjoy the movie.

Users can sit in the theater at any time, but unless the Admin wants them to view details produced by Express, an Express License must be given.



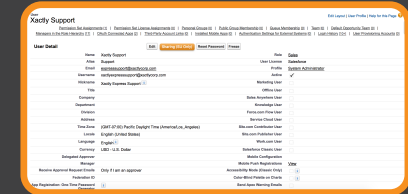
SALESFORCE LICENSE

Licenses with Salesforce come in two forms:

STANDARD SALESFORCE LICENSE: access to all apps. Permissions within Salesforce depending on profile settings.

SALESFORCE PLATFORM LICENSE: limited access to Salesforce. Often a user can edit if permission within profile given, but not create anything new and cannot view Salesforce Dashboards.

Either it be a Standard Salesforce License or the Salesforce Platform License, a user cannot access Express without first getting access to Salesforce.

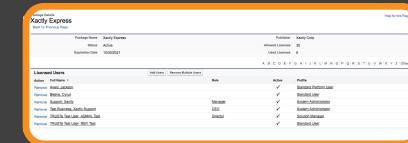


To give overall access:

1. Go to Salesforce > Setup
2. User Profile > Edit > Check "Active"

EXPRESS LICENSE

Once a Salesforce License has been given. Admins have the option to give the user access to Express by giving them an Express License.



The Express License is broken up into two pieces, the **EXPRESS LICENSE** that allows you to view Express and an **EXPRESS SEAT** which allows Admins to add users into the Express app and calculate against them.

This license allows users to see the Xactly Express tab when going to the header > "+" > Xactly Express. This does not add the user to plans. If a user is setup as a Sales Manager or Sales Rep they can view the Dashboard only.

To give viewing access:

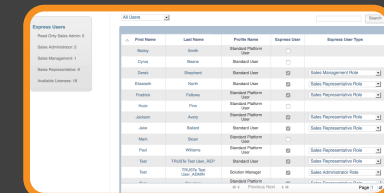
1. Go to Salesforce > Setup
2. Installed Packages > Manage Licenses > Add Users

NOTE: Results can still be calculated against a user as long as they have a seat in Express.

EXPRESS SEAT

Express Licenses and Express Seats are designed to go hand-in-hand (i.e. a 1:1 relationship).

That being said, often times during implementation or for various other reasons, an Admin can choose not to give a user an Express License, but can still calculate results on them. This requires the user to have an Express seat.



To give calculation access:

1. Go to Express > Setup > Manage Users
2. Check the box next to the reps name > assign a role

Sales Admin, Sales Manager, Sales Rep, or Read ONLY Sales Admin