IN THE UNITED STATES DISTRICT COURT FOR THE NORTHERN DISTRICT OF TEXAS DALLAS DIVISION

LILLY PAIN	WAY LLC,
Plaintiff,	

v.

SALESFORCE, INC.,

Defendant.

CIVIL ACTION NO.: 3:22-cv-1651 JURY TRIAL DEMANDED

COMPLAINT FOR PATENT INFRINGEMENT

1. This is an action under the patent laws of the United States, Title 35 of the United States Code, for patent infringement in which Lilly Pathway LLC ("Lilly" or "Plaintiff") makes the following allegations against Salesforce, Inc. ("Salesforce" or "Defendant").

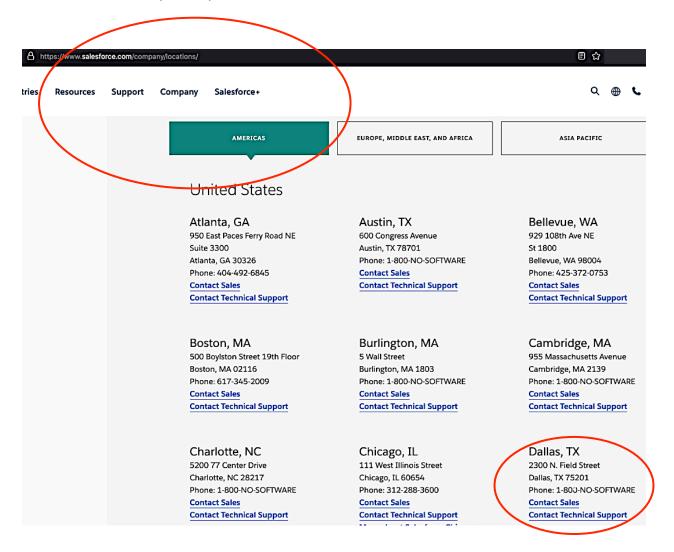
PARTIES

- 2. Plaintiff is a Texas limited liability company, having its primary office at 2100 14th St., Suite 107 (PMB 1046), Plano, TX 75074 located in Collin County, Texas.
- 3. Defendant is a Delaware corporation with a principal place of business at 50 Fremont St., Suite 300, San Francisco, CA 94105. Defendant has a regular and established place of business at in Dallas County at 2300 N. Field St., Dallas, TX 75201. Defendant's Registered Agent for service of process in Texas appears to be Corporation Service Co., 1999 Bryan St., Suite 900, Dallas, TX 75201.

JURISDICTION AND VENUE

- 4. This action arises under the patent laws of the United States, Title 35 of the United States Code. This Court has subject matter jurisdiction pursuant to 28 U.S.C. §§ 1331 and 1338(a).
- 5. Venue is proper in this district under 28 U.S.C. §§ 1391(c), generally, and under 1400(b), specifically. Defendant has a regular and established place of business in this Judicial District, and Defendant has also committed acts of patent infringement in this Judicial District.

- 6. Defendant is subject to this Court's specific and general personal jurisdiction pursuant to due process and/or the Texas Long Arm Statute, due at least to their substantial business in this forum, including: (i) at least a portion of the infringements alleged herein; and (ii) regularly doing or soliciting business, engaging in other persistent courses of conduct, and/or deriving substantial revenue from goods and services provided to individuals in Texas and in this Judicial District.
- 7. Defendant has a regular and established place of business in Dallas County, Texas at 2300 N. Field St., Dallas, TX 75201:



- 8. The instrumentalities accused of infringement (as detailed hereafter) are used and operated daily at this location.
- 9. Defendant has infringed, and does infringe, by operating, transacting, and conducting business within the Northern District of Texas.
- 10. Defendant's location in Dallas County is a regular and established place of business in this Judicial District, and Defendant has committed acts of infringement at its location within this District. Venue is therefore proper in this District under 28 U.S.C. § 1400(b).

COUNT I INFRINGEMENT OF U.S. PATENT NO. 7,715,564

- 11. Plaintiff is the owner by assignment of the valid and enforceable United States Patent No. 7,715,564 ("the '564 Patent") entitled "License Information Conversion Apparatus" including all rights to recover for past, present and future acts of infringement. The '564 Patent issued on May 11, 2010 and has a priority date of August 8, 2001. A true and correct copy of the '564 Patent is attached as Exhibit A.
- 12. The Defendant makes, uses, provides, offers for sale, and/or sells their customer relationship management (CRM) products, systems, and platforms including, but not limited to Salesforce's Customer 360 (the "Salesforce Systems"):

What is Salesforce?

Salesforce is a company that makes cloud-based software designed to help businesses find more prospects, close more deals, and wow customers with amazing service.

Customer 360, our complete suite of products, unites your sales, service, marketing, commerce, and IT teams with a single, shared view of customer information, helping you grow relationships with customers and employees alike.

13. More specifically, the Salesforce Systems that Defendant directly uses in commerce are the infringing instrumentalities ("Defendant's Infringing Instrumentalities" or "Infringing Instrumentalities").

- 14. The Defendant's Infringing Instrumentalities operate based upon an enterprise license from Salesforce to a client, for use of the Infringing Instrumentalities, stored in or accessible from the client's systems.
- 15. An admin within the client manages other end-users by assigning a permission set. The admin can create a permission set from the stored enterprise license that can be shared/assigned and deployed to various other end-users and their systems:

Manage Users

In Salesforce, each user is uniquely identified with a username, password, and profile. Together with other settings, the profile determines which tasks a user can perform, what data the user can see, and what the user can do with the data.

REQUIRED EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

The available user management options vary according to which Salesforce Edition you have

• User Management Administration

As a Salesforce administrator, you manage users in your org. Besides creating and assigning users, user management includes working with permissions and licenses, delegating users, and more.

User Management Settings

Manage org-wide user settings to improve user experience and increase org security.

View and Manage Users

In the user list, you can view and manage all users in your org, partner portal, and Salesforce Customer Portal. https://help.salesforce.com/s/articleView?id=sf.users_mgmt_overview.htm&type=5

Licenses Overview

To enable specific Salesforce functionality for your users, you must choose one user license for each user. To enable more functionality, you can assign permission set licenses and feature licenses to your users or purchase usage-based entitlements for your organization.

https://help.salesforce.com/s/articleView?id=sf.users licenses overview.htm&type=5

User Licenses

A user license determines the baseline of features that the user can access. Every user must have exactly one user license. You assign user permissions for data access through a profile and optionally one or more permission sets.

Permission Set Licenses

A permission set is a convenient way to assign users specific settings and permissions to use various tools and functions.

Permission set licenses incrementally entitle users to access features that are not included in their user licenses. Users can be assigned any number of permission set licenses.

• Feature Licenses Overview

A feature license entitles a user to access an additional feature that is not included with his or her user license, such as Marketing or WDC. Users can be assigned any number of feature licenses.

https://help.salesforce.com/s/articleView?id=sf.users licenses overview.htm&type=5

Create a Permission Set Associated with a Permission		
Set License		
For users to access license functionality, they must be	oth be assigned the permission set lice	ense and a permission set containing the
feature permissions.		
REQUIRED EDITIONS AND USER PERMISSION	ıs	
Available in: both Salesforce Classic (not available in all or	rgs) and Lightning Experience	
Available in: Professional, Enterprise, Performance, Unli	mited, and Developer Editions	
USER PERMISSIONS NEEDED		
To assign a permission set license:	Manage Users	
To assign a permission set to users:	Assign Permission Sets	
https://help.salesforce.com/s/articleView?id=sf.u	users_permissionset_licenses_and	_perm_sets.htm&type=5
USER PERMISSIONS NEEDED		
To manage licenses for an AppExchange app:	Manage Package Licenses	

Administrators can use the API to assign or revoke licenses for any managed package installed in their organization. License information for a package is stored in two objects, PackageLicense and UserPackageLicense, which were previously accessible only from the Manage Licenses page under Setup. These are now accessible as standard objects, so an administrator can assign licenses to specific users via API calls. This makes managing package licenses in a subscriber organization faster and easier, especially for large-scale deployments.

For example, suppose an administrator installs an app for use by all 200 salespeople in the company. Assigning a license to each salesperson from the UI is inefficient and time-consuming. Using the API, the administrator can assign licenses to all salespeople, based on their profile, in one step.

Here are some $\underline{\text{common licensing tasks that administrators can use the API to }\underline{\text{do}}.$

- · Determine the number of package licenses in use and available.
- Verify if a specific user has a license for the package.
- · Get a list of all users who have a license for the package.
- · Assign a package license to a user or group of users.
- Revoke a package license that was previously assigned to a user.
- 16. The admin can configure various permissions in the license package that will affect the way an end-user accesses applications within the Infringing Instrumentalities. As shown, first license information (*e.g.*, enterprise license) includes at least two pieces of usage permission information for permitting use of content data:

. What Are Permission Set Licenses?

Permission set licenses incrementally entitle users to access features that are not included in their user licenses. Users can be assigned any number of permission set licenses.

. Create a Permission Set Associated with a Permission Set License

For users to access license functionality, they must both be assigned the permission set license and a permission set containing the feature permissions.

View and Manage Your Permission Set Licenses

View information about the permission set licenses that you purchased and manage user assignments.

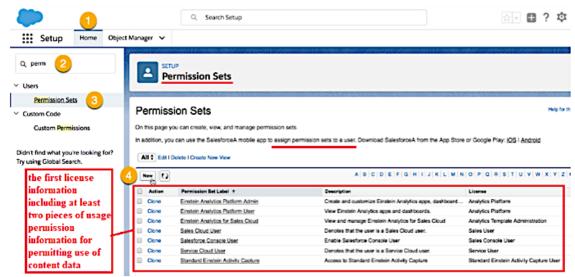
Assign a Permission Set License to a User

You might need to assign a permission set license to a user before you can assign certain permissions.

· Remove a Permission Set License from a User

First remove or modify the relevant assigned permission sets that require the license, and then remove the assigned permission set license.

https://help.salesforce.com/s/articleView?id=sf.users permissionset licenses overview.htm&type=5



https://sfdx-isv.github.io/sfdx-workshop/sfdx-managed-packages/create-permission-set-for-your-app/

17. The admin accesses the stored license package, which can be translated/converted to a sharable package that can be deployed to different devices/platforms and end-users. The Infringing Instrumentalities store license information for a package. End-users who are assigned permissions via a package license do not have permission to share or assign the generated license or further create a permission set for other packages:

USER PERMISSIONS NEEDED	
To manage licenses for an AppExchange app:	Manage Package Licenses

Administrators can use the API to assign or revoke licenses for any managed package installed in their organization. License information for a package is stored in two objects, PackageLicense and UserPackageLicense, which were previously accessible only from the Manage Licenses page under Setup. These are now accessible as standard objects, so an administrator can assign licenses to specific users via API calls. This makes managing package licenses in a subscriber organization faster and easier, especially for large-scale deployments.

For example, suppose an administrator installs an app for use by all 200 salespeople in the company. Assigning a license to each salesperson from the UI is inefficient and time-consuming. Using the API, the administrator can assign licenses to all salespeople, based on their profile, in one step.

Here are some common licensing tasks that administrators can use the API to do.

- · Determine the number of package licenses in use and available.
- Verify if a specific user has a license for the package.
- · Get a list of all users who have a license for the package.
- · Assign a package license to a user or group of users.
- Revoke a package license that was previously assigned to a user.

Permission Sets

Assign permission sets included in a package to the users who need access to the package.

You can't edit permission sets that are included in a managed package. If you clone a permission set that comes with the package or create your own, you can make changes to the permission set, but subsequent upgrades won't affect it.

https://help.salesforce.com/s/articleView?id=sf.distribution_configuring_packages.htm&type=5

Assigning Licenses for Installed Packages

REQUIRED EDITIONS AND USER PERMISSIONS

Available in: Salesforce Classic (not available in all orgs)

Available in: Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions

USER PERMISSIONS
NEEDED

To manage licenses for an AppExchange app:

Manage Package Licenses

https://help.salesforce.com/s/articleView?id=sf.distribution_assigning_user_licenses.htm&type=5

Create a Permission Set Associated with a Permission Set License

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ISER PERMISSIONS NEEDED		
o assign a permission set license:	Manage Users	
o assign a permission set to users:	Assign Permission Sets	

- From Setup, enter Company Information in the Quick Find box, then select Company Information and scroll down to Permission Set Licenses.
 - You can see how many permission set licenses are available and have already been assigned. You can also see how many types of permission set licenses you have for different features.
- 2. From Setup, enter Permission Sets in the Quick Find box, then select Permission Sets.
- Click New.
- 4. Enter your permission set information.
- 5. For License, select the license to associate with this permission set.

https://help.salesforce.com/s/articleView?id=sf.users_permissionset_licenses_and_perm_sets.htm&type=5

Assign Permission Sets and Permission Set Licenses

With permission set licenses, users can get more features than with the basic license. To enable users to work with Volunteer Projects and Volunteer Shifts, assign them the necessary permission set licenses.

REQUIRED EDITIONS AND USER PERMISSIONS

Available in: Enterprise, Performance, and Unlimited editions.	
USER PERMISSIONS NEEDED	
To assign permission set licenses:	Manage Users

- 1. In Setup, in the Quick Find box select Users, and then click the user name that you want to assign permission set licenses to.
- 2. In the Permission Set License Assignments section of the User record, click Edit Assignments.
- Select one or more permission set licenses to assign.
 For volunteers (site users), make sure to select the Public Sector For Community permission set license.

https://help.salesforce.com/s/articleView?id=sf.users_permissionset_licenses_and_perm_sets.htm&type=5

Namespace permission set licenses appear on the Company Information page along with other permission set licenses. You assign them in the same manner as other permission set licenses. You can entitle access to an entire package or multiple packages, respectively, within a single namespace.

To view the properties and permissions of your namespace permission set license, from Setup, in the Quick Find box, enter Users, and then select Users. Select a user and from the Permission Set License Assignments related list, click Edit Assignments. Here you can view the contents of a permission set license, the package namespace, and license expiration policy details.



License Expiration Policy indicates whether package access is blocked for existing users when all namespace permission set licenses expire.

https://help.salesforce.com/s/articleView?id=sf.distribution license npsl.htm&type=5

18. The Infringing Instrumentalities convert information contained in the first license (e.g., license information associated with admin), except for at least one piece of usage permission information (e.g., permission to create a permission set and assign permission set license/package license for installed packages) which is not given permission in the conversion-permission information (e.g., package license information), into the second license information (e.g., license information associated with an end-user):

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To manage licenses for an AppExchange app:	Manage Package Licenses

Administrators can use the API to assign or revoke licenses for any managed package installed in their organization. License information for a package is stored in two objects, PackageLicense and UserPackageLicense, which were previously accessible only from the Manage Licenses page under Setup. These are now accessible as standard objects, so an administrator can assign licenses to specific users via API calls. This makes managing package licenses in a subscriber organization faster and easier, especially for large-scale deployments.

For example, suppose an administrator installs an app for use by all 200 salespeople in the company. Assigning a license to each salesperson from the UI is inefficient and time-consuming. Using the API, the administrator can assign licenses to all salespeople, based on their profile, in one step.

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- · Get a list of all users who have a license for the package.
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Permission Sets

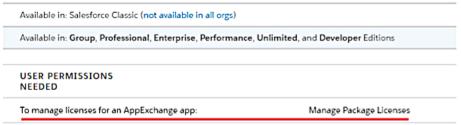
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You can't edit permission sets that are included in a managed package. If you clone a permission set that comes with the package or create your own, you can make changes to the permission set, but subsequent upgrades won't affect it.

https://help.salesforce.com/s/articleView?id=sf.distribution_configuring_packages.htm&type=5

Assigning Licenses for Installed Packages

REQUIRED EDITIONS AND USER PERMISSIONS



https://help.salesforce.com/s/articleView?id=sf.distribution_assigning_user_licenses.htm&type=5

Create a Permission Set Associated with a Permission Set License

For users to access license functionality, they must both be assigned the permission set license and a permission set containing the feature permissions.

REQUIRED EDITIONS AND USER PERMISSIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

NEEDED

To assign a permission set license:

Manage Users

To assign a permission set to users:

Assign Permission Sets

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 From Setup, enter Company Information in the Quick Find box, then select Company Information and scroll down to Permission Set Licenses.

You can see how many permission set licenses are available and have already been assigned. You can also see how many types of permission set licenses you have for different features.

- 2. From Setup, enter Permission Sets in the Quick Find box, then select Permission Sets.
- 3. Click New.
- 4. Enter your permission set information.
- For License, select the license to associate with this permission set.

https://help.salesforce.com/s/articleView?id=sf.users_permissionset_licenses_and_perm_sets.htm&type=5

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- 1. In Setup, in the Quick Find box select Users, and then click the user name that you want to assign permission set licenses to.
- 2. In the Permission Set License Assignments section of the User record, click Edit Assignments.
- Select one or more permission set licenses to assign.
 For volunteers (site users), make sure to select the Public Sector For Community permission set license.

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Namespace permission set licenses appear on the Company Information page along with other permission set licenses. You assign them in the same manner as other permission set licenses. You can entitle access to an entire package or multiple packages, respectively, within a single namespace.

To view the properties and permissions of your namespace permission set license, from Setup, in the Quick Find box, enter Users, and then select **Users**. Select a user and from the Permission Set License Assignments related list, click **Edit Assignments**. Here you can view the contents of a permission set license, the package namespace, and license expiration policy details.



License Expiration Policy indicates whether package access is blocked for existing users when all namespace permission set licenses expire.

https://help.salesforce.com/s/articleView?id=sf.distribution_license_npsl.htm&type=5

- 19. Plaintiff herein restates and incorporates by reference paragraphs 12 18, above.
- 20. All recited elements of at least claims 1 and 2 of the '564 Patent are present within the structure and/or operation of Defendant's Infringing Instrumentalities.
- 21. Defendant's Infringing Instrumentalities convert first license information (*e.g.*, enterprise level license information associated with admin) for a first system (*e.g.*, admin's system) into second license information (*e.g.*, license information associated with an end-user) for a second system (*e.g.*, end-user's system), which is different from the first system.

- 22. The first license information of the Defendant's Infringing Instrumentalities comprises at least two pieces of usage permission information for permitting use of content data.
- 23. Defendant's Infringing Instrumentalities store conversion-permission information (e.g., permissions selected as part of an end-user license package) that indicates at least one piece of usage permission information from the first license information (e.g., permission to create packages) that is not permitted to be converted into the second license information.
- 24. Defendant's Infringing Instrumentalities convert information contained in the first license information (*e.g.*, license information associated with admin), except the at least one piece of usage permission information (*e.g.*, permission to create packages), into the second license information (*e.g.*, license information associated with end-user license package).
- 25. Defendant's Infringing Instrumentalities infringe at least claims 1 and 2 of the '564 Patent.
- 26. Defendant's Infringing Instrumentalities literally and directly infringe at least claims 1 and 2 of the '564 Patent.
- 27. Defendant's Infringing Instrumentalities perform or comprise all required elements of at least claims 1 and 2 of the '564 Patent.
- 28. In the alternative, Defendant's Infringing Instrumentalities infringe at least claims 1 and 2 of the '564 Patent under the doctrine of equivalents. Defendant's Infringing Instrumentalities perform substantially the same functions in substantially the same manner with substantially the same structures, obtaining substantially the same results, as the required elements of at least claims 1 and 2 of the '564 Patent. Any differences between Defendant's Infringing Instrumentalities and the claims of the '564 Patent are insubstantial.
- 29. All recited elements of at least claims 1 and 2 of the '564 Patent are present within, or performed by, Defendant's Infringing Instrumentalities.
- 30. Defendant's Infringing Instrumentalities, when used and/or operated in their intended manner or as designed, infringe at least claims 1 and 2 of the '564 Patent, and Defendant is therefore liable for infringement of the '564 Patent.

[12]

DEMAND FOR JURY TRIAL

Plaintiff, under Rule 38 of the Federal Rules of Civil Procedure, requests a trial by jury of any issues so triable by right.

PRAYER FOR RELIEF

WHEREFORE, Plaintiff respectfully requests that this Court enter:

- a. A judgment in favor of Plaintiff that Defendant has infringed the '564 Patent;
- b. A permanent injunction enjoining Defendant and its officers, directors, agents, servants, affiliates, employees, divisions, branches, subsidiaries, parents, and all others acting in active concert therewith, from infringement of the '564 Patent;
- c. A judgment and order requiring Defendant to pay Plaintiff its damages, costs, expenses, and pre-judgment and post-judgment interest for Defendant's infringement of the '564 Patent, as provided under 35 U.S.C. § 284;
- d. An award to Plaintiff for enhanced damages resulting from the knowing and deliberate nature of Defendant's prohibited conduct with notice being made at least as early as the service date of this complaint, as provided under 35 U.S.C. § 284;
- e. A judgment and order finding that this is an exceptional case within the meaning of 35 U.S.C. § 285 and awarding to Plaintiff its reasonable attorneys' fees; and
 - f. Any and all other relief to which Plaintiff may show itself to be entitled.

July 29, 2022

Respectfully Submitted,

By: /s/ Ronald W. Burns

Ronald W. Burns (*Lead Counsel*) Texas State Bar No. 24031903 Fresh IP, PLC 5999 Custer Road, Suite 110-507 Frisco, Texas 75035 972-632-9009 ron@freship.com

ATTORNEY FOR PLAINTIFF LILLY PATHWAY LLC