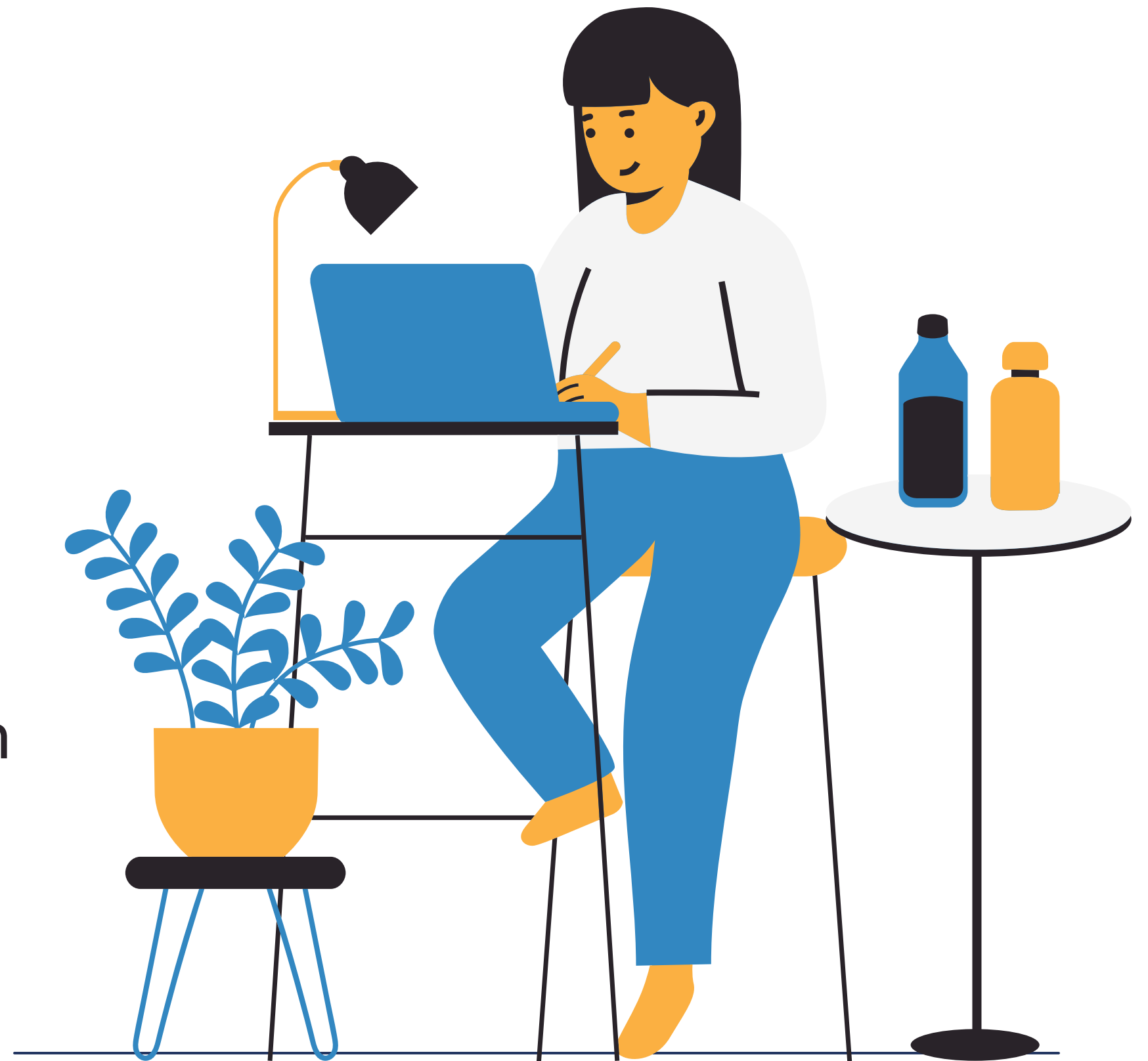


# Salesforce org self-assessment tool

Assess your Salesforce org - it's a great start to see where you're at with your Salesforce journey.



# Check your Users & Company Info



# Are all your users **active** in Salesforce?

You can find it in the Users section in Setup.

New User

Reset Password(s)

Add Multiple Users

<input type="checkbox"/> Action	Full Name ↑	Alias	Username	Last Login	Role	Active	Profile	Manager
<input type="checkbox"/>   <a href="#">Edit</a>	Cappellini, Serena	SCapp	serena.cappellini@brave-shark-h03bh7.com	8/14/2021, 2:20 AM		✓	System Administrator	
<input type="checkbox"/>   <a href="#">Edit</a>	Chatter Expert	Chatter	chatty_00d5g0000071kpceaa.poa2xop7xnpz@chatter.salesforce.com			✓	Chatter Free User	
<input type="checkbox"/>   <a href="#">Edit</a>	User, Integration	integ	integration@00d5g0000071kpceaa.com			✓	Analytics Cloud Integration User	
<input type="checkbox"/>   <a href="#">Edit</a>	User, Security	sec	insightssecurity@00d5g0000071kpceaa.com			✓	Analytics Cloud Security User	

New User

Reset Password(s)

Add Multiple Users

One good way to check is to see when their **Last Login** date was.

Divide your number of **active users** by the number of **total users** and add the number to the **Ao Health Chart**.

$$\frac{\text{active users}}{\text{total users}} = \text{active users \%}$$

# Check your User and Feature Licenses



# Do you need all your **licenses**?

You can find it in the Company Information section in Setup.

SETUP Company Information					
User Licenses <a href="#">User Licenses Help ?</a>					
Name	Status	Total Licenses	Used Licenses	Remaining Licenses	Expiration Date
Salesforce	Active	2	1	1	
Chatter Free	Active	5,000	1	4,999	
Salesforce Platform	Active	3	0	3	
Customer Community Login	Active	5	0	5	
XOrg Proxy User	Active	2	0	2	
Work.com Only	Active	3	0	3	
Customer Portal Manager Custom	Active	5	0	5	
Identity	Active	10	0	10	
Customer Community Plus	Active	5	0	5	
Silver Partner	Active	2	0	2	
<a href="#">Show 10 more »</a>   <a href="#">Go to list (23) »</a>					
Feature Licenses <a href="#">Feature Licenses Help ?</a>					
Feature Type	Status	Total Licenses	Used Licenses	Remaining Licenses	
Marketing User	Active	2	1	1	
Apex Mobile User	Active	2	1	1	
Offline User	Active	2	1	1	
Knowledge User	Active	2	0	2	
Flow User	Active	3	0	3	
Service Cloud User	Active	2	1	1	
Data.com User	Active	2	0	2	
Chat User	Active	2	0	2	
Site.com Contributor User	Active	1	0	1	
Site.com Publisher User	Active	2	0	2	
Chatter Answers User	Active	30	0	30	
WDC User	Active	5	0	5	
Salesforce CRM Content User	Active	5	1	4	

Have a close look at:

- **User Licenses**
- **Feature Licenses**

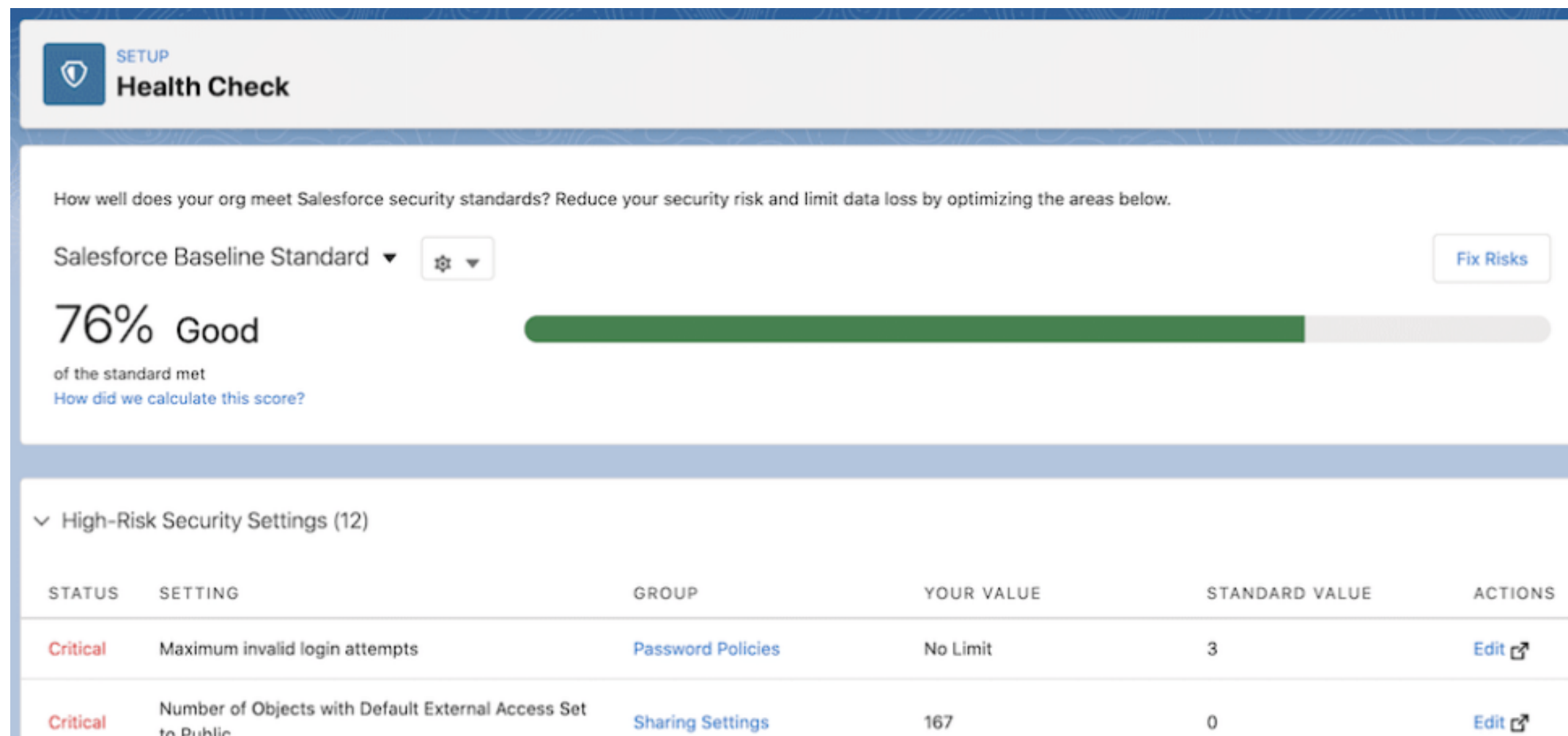
Add your findings in the **Ao Health Chart** if you wish to discuss with us.

# Run a Security Health Check Report



# Run the **Salesforce** Health Check Report

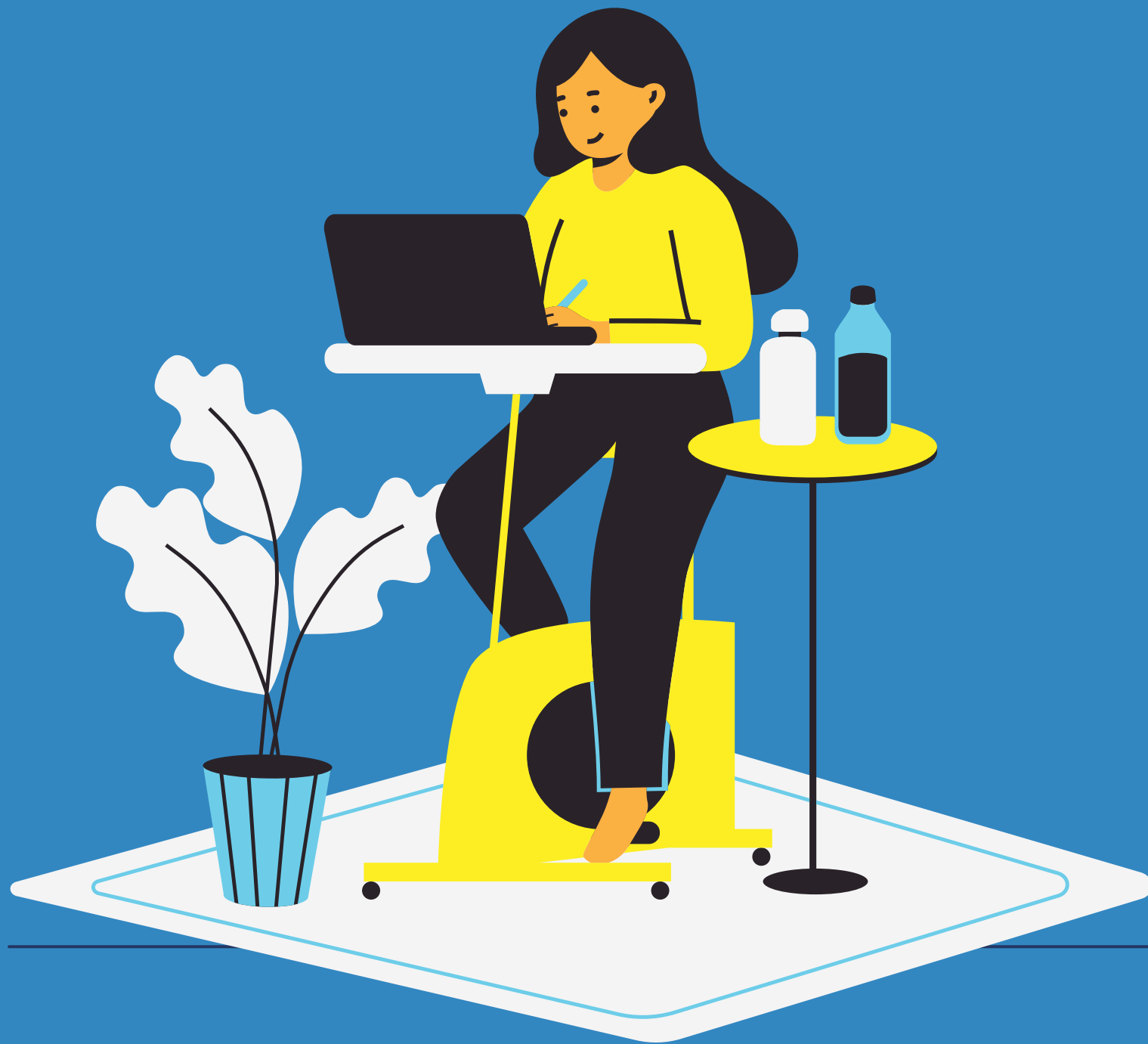
You can find and run it in the Security Settings section in Setup.



Add your Salesforce Baseline Standard % in the **Ao Health Chart** if you wish to discuss with us.

PRO tip: if you haven't already, make sure you implement **MFA**

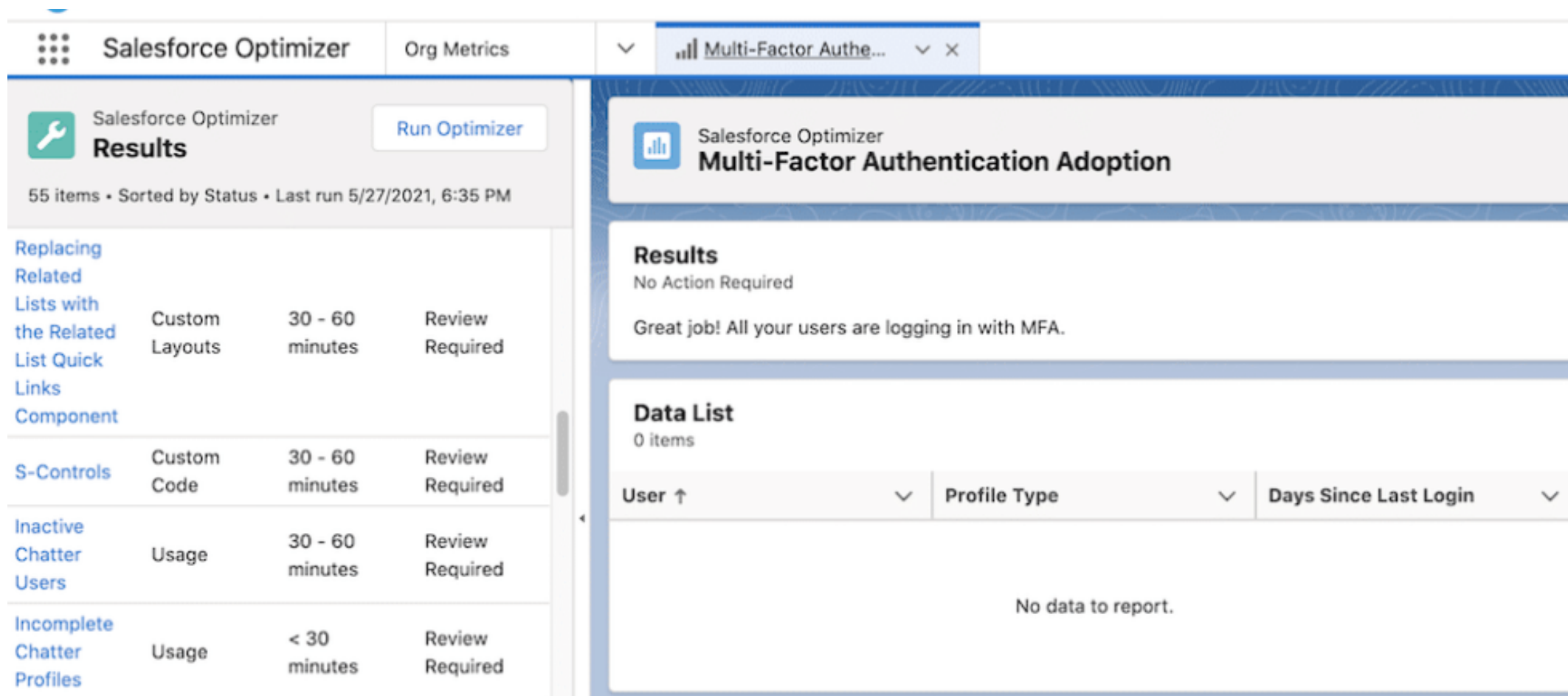
# Run the Optimizer Report





# Run the **Salesforce** Optimizer App

You can find it in the Optimizer section in Setup if you need to allow access.



The screenshot displays the Salesforce Optimizer interface. The top navigation bar includes 'Salesforce Optimizer', 'Org Metrics', and a dropdown menu with 'Multi-Factor Authen...'. The main content area is divided into two panels. The left panel, titled 'Salesforce Optimizer Results', shows a list of items with columns for Component, Custom Layouts, Time (30 - 60 minutes), and Review Required. The right panel, titled 'Salesforce Optimizer Multi-Factor Authentication Adoption', shows the results of the MFA adoption. It includes a 'Results' section with 'No Action Required' and 'Great job! All your users are logging in with MFA.' Below this is a 'Data List' section with '0 items' and a table with columns for User, Profile Type, and Days Since Last Login. The table is currently empty, displaying 'No data to report.'

Component	Custom Layouts	Time	Review Required
Replacing Related Lists with the Related List Quick Links Component	Custom Layouts	30 - 60 minutes	Review Required
S-Controls	Custom Code	30 - 60 minutes	Review Required
Inactive Chatter Users	Usage	30 - 60 minutes	Review Required
Incomplete Chatter Profiles	Usage	< 30 minutes	Review Required

User	Profile Type	Days Since Last Login
No data to report.		

Click on the **Run Optimizer** button on the top right corner to get the most recent data.

Add your findings in the **Ao Health Chart** if you wish to discuss with us.

# Ao Health Chart



Active Users %

Licenses to Review

Security Health Check %

Salesforce Optimizer

Get in touch with us to discuss your results and plan your next steps.



*Collaboration*

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