



SALESFORCE OPTIMIZER REPORT

29 September 2020 | ORG ID: 00D4W000005iQHIUAM

Enterprise Edition

Report v 2.7



Check out the Optimizer App.

[Learn more](#)



Join us for an interactive discussion with your peers on how to use this report to your advantage.

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WELCOME

What's in This Report?

We analyzed your Salesforce implementation to determine how your company uses certain features. We then identified a few ways that you can improve your implementation for your company. If you're curious about which features we included in our analysis, see [Which Features Does the Optimizer Report Evaluate?](#)

Note: If you're running Optimizer on a Lightning app, Optimizer only analyzes a subset of features. Your Lightning app Optimizer report won't include all the features that are included in a full report.

How Do I Use This Report?

Review your report to learn about the tweaks you need to make for your users to get the most out of Salesforce. Throughout this report, we include concrete recommendations that you can implement in Salesforce.

First time running the Optimizer report? Learn more in the [Salesforce Help](#).

Impact Scale



A green icon indicates that all is well with a feature.



A yellow icon indicates that a feature might not comply with Salesforce's advised best practices. These issues might not require immediate attention.



An orange icon indicates that a feature doesn't comply with Salesforce's best practices. These issues likely require attention.



A red icon indicates that a feature doesn't comply with Salesforce's best practices or that you're approaching limits in your implementation. These issues require immediate attention.



A purple icon indicates ways that you can improve your implementation by enabling Salesforce features.

Accelerate Your Path to Success

Need more help? To learn more about how Optimizer can help you improve your implementation:

- Join the [Success Community](#).
- Sign up for our [Circles of Success](#) webinar.
- Check out a tailored list of success resources.

Learn from Others

Join us for an interactive discussion with your peers on how to use this report to your advantage.

- Sign up for the [Optimizer webinar](#).



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MONITOR LIMITS SUMMARY

File Storage Limit >

LIMIT: 13.3 GB PER ORG

0 GB

in use



✓ Great job! You're using less than **70% of your file storage limit**. Export or delete files, or purchase more storage space.

Data Storage Limit >

LIMIT: 10.4 GB PER ORG

0 GB

in use



✓ Great job! You're using less than **70% of your data storage limit**. Export or delete data, or purchase more storage space.

Static Resource Limit >

LIMIT: 250 MB PER ORG

4 MB

in use



✓ Great job! You're using less than **70% of your static resource limit**. Export static resources, and then delete them.

Custom Field Limit >

LIMIT: 500 FIELDS PER OBJECT

1
object

✓ Great job! Your field usage looks good. Delete unnecessary custom fields.

Active Sharing Rule Limits >

LIMIT: 300 SHARING RULES PER OBJECT

0
objects

✓ Great job! Your implementation uses sharing rules according to our best practices. Delete unnecessary sharing rules.

Active Workflow Rule Limits >

LIMIT: 50 WORKFLOW RULES PER OBJECT

0
objects

✓ Great job! Your implementation uses workflow rules according to our best practices. Delete unnecessary workflow rules, or consolidate them with Process Builder.

Was this helpful?



MONITOR LIMITS SUMMARY

Active Validation Rule Limits >

LIMIT: **100 VALIDATION RULES PER OBJECT**

0
objects



Great job! Your implementation uses validation rules according to our best practices. Delete unnecessary validation rules.

Was this helpful?



• MONITOR LIMITS

- Org Limits
 - File Storage Limit
 - Data Storage Limit
 - Static Resource Limit
- Object Limits

OPTIMIZE & MAINTAIN
INCREASE ADOPTION

SUCCESS RESOURCES

File Storage Limit

Limit:
13.3 GB per org

OBSERVATION



Great job! You're using less than **70% of your file storage limit.**

0 GB (0%)



IMPACT

If you meet or exceed your file storage limit, users receive errors and can't add new files to Salesforce.

RECOMMENDATION

Determine whether you need old files that are lingering in your implementation. Export the files that your users no longer need, and then delete them from Salesforce. If your users still need access to these files, contact your Salesforce account executive to purchase more storage space.

[Monitor Data and Storage Resources Documentation](#)

[Data Management Trailhead](#)

Top Success Resource

[Data Management Rockstar Circles of Success Webinar](#)

[View All](#)

• MONITOR LIMITS

- Org Limits
 - File Storage Limit
- Data Storage Limit
 - Static Resource Limit

Object Limits

OPTIMIZE & MAINTAIN
INCREASE ADOPTION

SUCCESS RESOURCES

Data Storage Limit

Limit:
10.4 GB per org

OBSERVATION



Great job! You're using less than **70% of your data storage limit.**

0 GB (0%)



IMPACT

If you meet or exceed your data storage limit, users receive errors and can't add new records or data to Salesforce.

RECOMMENDATION

Determine whether you need old records that are lingering in your implementation. Export the data that your users no longer need, and then delete it from Salesforce. If your users still need access to this data, contact your Salesforce representative to purchase more storage space.

[Data and File Storage Allocations Documentation](#)

[Best Practices for Deployments with Large Data Volumes](#)

[Data Loader Documentation](#)

[Data Management Trailhead](#)

Top Success Resource

[View All](#)

[Streamline Salesforce Experience Through Data Archival and Cleanup Circles of Success Webinar](#)

• MONITOR LIMITS

Org Limits

File Storage Limit

Data Storage Limit

• Static Resource Limit

Object Limits

OPTIMIZE & MAINTAIN
INCREASE ADOPTION

SUCCESS RESOURCES

Static Resource
Limit

Limit:
250 MB per org

OBSERVATION

Static resources in managed packages count against your static resource limits. We include static resources in managed packages in this analysis.



Great job! You're using less than **70% of your static resource limit.**

4MB (2%)



IMPACT

If you meet or exceed your data storage limit, users receive errors and can't add new records or data to Salesforce.

RECOMMENDATION

Determine whether you need old static resources that are lingering in your implementation. Export the static resources that your users no longer need, and then delete them from Salesforce.

[Monitor Data and Storage Resources Documentation](#)

[Best Practices for Static Resources](#)
[Use Static Resources Trailhead](#)

Top Success Resource

[View All](#)

[Streamline Salesforce Experience Through Data Archival and Cleanup Circles of Success Webinar](#)

• MONITOR LIMITS

Org Limits

Object Limits

- Custom Field Limits

Active Sharing Rule Limits

Active Workflow Rule Limits

Active Validation Rule Limits

OPTIMIZE & MAINTAIN
INCREASE ADOPTION

SUCCESS RESOURCES

Custom Field Limit

Limit:
500 fields per object

OBSERVATION



Great job! Your field usage looks good.

NUMBER OF
FIELDS

● 0-350

● 351-450
(>70%)

● 451-500
(>90%)

Opportunity

4

IMPACT

You can't add new fields to an object when you reach the field limit for your edition.

• MONITOR LIMITS

- Org Limits
- Object Limits
 - Custom Field Limits
 - Active Sharing Rule Limits
 - Active Workflow Rule Limits
 - Active Validation Rule Limits

OPTIMIZE & MAINTAIN
INCREASE ADOPTION

SUCCESS RESOURCES

Custom Field
Limit
(continued)

RECOMMENDATION

Delete custom fields that your users don't use or need. Use your [sandbox](#) to test changes before you deploy them to your users. If your users need these fields, consider [upgrading your Salesforce edition to increase your field limits](#).

- Custom Fields Documentation
- Field Footprint App
- Data Modeling Trailhead

Top Success Resource

Getting Started with Salesforce Customizations Circles of Success Webinar

View All

• MONITOR LIMITS

Org Limits

Object Limits

Custom Field Limits

- Active Sharing Rule Limits
 - Active Workflow Rule Limits
 - Active Validation Rule Limits

OPTIMIZE & MAINTAIN
INCREASE ADOPTION

SUCCESS RESOURCES

Active Sharing Rule Limits

Limit:
300 sharing rules per object

OBSERVATION



Great job! Your implementation uses sharing rules according to our best practices.

IMPACT

Too many sharing rules on objects can increase the time it takes to save and load records.

• MONITOR LIMITS

- Org Limits
- Object Limits
 - Custom Field Limits
 - Active Sharing Rule Limits
 - Active Workflow Rule Limits
 - Active Validation Rule Limits

OPTIMIZE & MAINTAIN
INCREASE ADOPTION

SUCCESS RESOURCES

Active Sharing Rule Limits (continued)

RECOMMENDATION

Delete unnecessary sharing rules, and use your [sandbox](#) to test changes before you deploy them to users.

- [Sharing Rules Documentation](#)
- [Sharing Rule Limits Documentation](#)
- [Overview of Data Security Trailhead](#)

Top Success Resource

[Automate Key Business Processes with Lightning Process Builder](#)

View All

• MONITOR LIMITS

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Active Sharing Rule Limits

- Active Workflow Rule Limits

Active Validation Rule Limits

OPTIMIZE & MAINTAIN
INCREASE ADOPTION

SUCCESS RESOURCES

Active Workflow Rule Limits

Limit:
50 workflow rules per object

OBSERVATION



Great job! Your implementation uses workflow rules according to our best practices.

IMPACT

Too many workflow rules on objects can increase the time it takes to save and load records.

• MONITOR LIMITS

- Org Limits
- Object Limits
 - Custom Field Limits
 - Active Sharing Rule Limits
 - Active Workflow Rule Limits
 - Active Validation Rule Limits

OPTIMIZE & MAINTAIN
INCREASE ADOPTION

SUCCESS RESOURCES

Active Workflow
Rule Limits
(continued)

RECOMMENDATION

Delete unnecessary workflow rules for each object, and use your [sandbox](#) to test changes before you deploy them to your users.

Consolidate the workflow rules on an object into a single process with the [Lightning Process Builder](#).

Workflow Limits Documentation	Process Limits Documentation
Automate Basic Business Processes with Process Builder Trailhead	Workflow Rule Migration Trailhead

Top Success Resource

[Automate Key Business Processes with Lightning Process Builder](#)

[View All](#)

• MONITOR LIMITS

Org Limits

Object Limits

Custom Field Limits

Active Sharing Rule Limits

Active Workflow Rule Limits

- Active Validation Rule Limits

OPTIMIZE & MAINTAIN
INCREASE ADOPTION

SUCCESS RESOURCES

Active Validation Rule Limits

Limit:
100 validation rules per object

OBSERVATION



Great job! Your implementation uses validation rules according to our best practices.

IMPACT

It takes longer for users to save records that have a high number of validation rules, and you might be approaching validation rule limits.

• MONITOR LIMITS

Org Limits

Object Limits

Custom Field Limits

Active Sharing Rule Limits

Active Workflow Rule Limits

- Active Validation Rule Limits

OPTIMIZE & MAINTAIN
INCREASE ADOPTION

SUCCESS RESOURCES

Active Validation
Rule Limits
(continued)

RECOMMENDATION

Delete unnecessary validation rules for each object, and use your [sandbox](#) to test changes before you deploy them to your users.

If all the validation rules are necessary to your users, consider [upgrading your Salesforce edition to increase your validation rule limits](#).

[Validation Rules Documentation](#)

[Validation Rules Developer Documentation](#)

[Examples of Validation Rules Developer Documentation](#)

[Creating Validation Rules Trailhead](#)

Top Success Resource

[View All](#)

[Transform Your Business with Automation Circles of Success Webinar](#)

Was this helpful?



OPTIMIZE & MAINTAIN SUMMARY

Field Usage >

1
field



One field was completed less than 10% of the time within the past three months. Delete custom fields that your users don't use or need.

Fields on Page Layouts >

6
page layouts



Great job! Your page layouts meet our best practices. Delete custom fields that your users don't use or need.

Details Tab on Record Pages >

0
lightning pages



Great job! Your use of the Details tab meets our best practices. Move the Details tab so that it's not shown by default on a Lightning record page.

Unused Reports >

108
reports



You have 108 unused reports. Delete unused reports that haven't been run recently.

Unused Dashboards >

6
dashboards



You have 6 unused dashboards. Delete unused dashboards.

Unassigned Page Layouts >

2
page layouts



You have 2 page layouts that aren't assigned to a record type. Assign page layouts to a record type, or delete them.



Was this helpful?



OPTIMIZE & MAINTAIN SUMMARY

Unassigned Record Types >

0
record types



Great job! You don't have unassigned record types. Delete unassigned record types.

Page Layouts per Object >

4
objects



Great job! You use page layouts according to our best practices. Implement consistent page layouts, and delete unnecessary ones.

Record Types per Object >

4
objects



Great job! You use record types according to our best practices. Implement consistent record types on objects, and delete unnecessary ones.

Replacing Related Lists with the Related List Quick Links Component >

0
objects



Great job! You use related lists according to our best practices. Replace default related lists with the Related List Quick Links Lightning component.

News and Twitter >

0
Components



Great job! Your News and Twitter components are already behind a tab. Put the News and Twitter components on a secondary tab to increase performance.

Lightning Components on Record Lightning Pages >

0
lightning pages



Great job! You use Lightning components according to our best practices. For record Lightning pages, move some Lightning components to the Tabs or Accordion Lightning component.



Was this helpful?



OPTIMIZE & MAINTAIN SUMMARY

Inactive Validation Rules >

0
validation rules



Great job! You don't have any inactive validation rules. Delete inactive validation rules.

Inactive Workflow Rules >

0
workflow rules



Great job! You don't have any inactive workflow rules. Delete inactive workflow rules.

User Logins >

0%
of users



0 users haven't logged in lately. Determine whether these users need access to Salesforce.

Administrator Permissions >

1
administrator



Great job! You have an appropriate number of administrators for your implementation. Reduce the number of users who have administrator permissions.

Unassigned Roles >

1
role



You have 1 unassigned role. Delete roles that don't have users assigned to them.

Unassigned Custom Profiles >

3
custom profiles



You have 3 unassigned custom profiles. Delete custom profiles that don't have users assigned to them.



MONITOR LIMITS

• OPTIMIZE & MAINTAIN
INCREASE ADOPTION

SUCCESS RESOURCES

Was this helpful?



OPTIMIZE & MAINTAIN SUMMARY

Custom Profiles with a Low Number of Users >

0
custom profiles



Great job! You don't have profiles with a low number of users. Consolidate profiles with a low number of active users.

Unassigned Permission Sets >

0
permission sets



Great job! You don't have unassigned permission sets. Delete permission sets that don't have users assigned to them.

Permission Sets with a Low Number of Users >

2
permission sets



You have 2 permission sets with a low number of users. Consolidate permission sets with a low number of active users.

Formula Fields with JavaScript Code >

0
formula fields



Great job! You don't have formula fields that contain JavaScript code. Remove all JavaScript code from formula fields.

Multiple Apex Triggers per Object >

0
objects



Great job! You use triggers according to our best practices. Consolidate triggers, or replace them by using the Lightning Process Builder.

API versions >

Number of out-of-date APIs:

0

Apex Classes

0

Apex Triggers

0

Visualforce Pages



Great job! Your code is up to date. Ask your developer to update this code.



MONITOR LIMITS

• OPTIMIZE & MAINTAIN
INCREASE ADOPTION

SUCCESS RESOURCES

Was this helpful?



OPTIMIZE & MAINTAIN SUMMARY

New Code Using Old API Versions >

Number of out-of-date APIs:

0

Apex Classes

0

Apex Triggers

0

Visualforce
Pages



Great job! Your code is up to date. Ask your developer to update this code.

My Domain >



Great job! My Domain is enabled in your org. Add a subdomain to your Salesforce org URL with My Domain.



MONITOR LIMITS

• OPTIMIZE & MAINTAIN

Fields

• Field Usage

Fields On Page Layouts

Details Tab On Record Pages

Reports And Dashboards

Custom Layouts For Objects

Lightning Pages

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Custom Code


INCREASE ADOPTION

SUCCESS RESOURCES

Field Usage

OBSERVATION

We analyze the field usage on the five objects with the most records in your implementation over the past three months.

 **1 fields** were completed less than 10% of the time within the last three months.

IMPACT

Unnecessary fields clutter your objects and make your implementation difficult to maintain.

RECOMMENDATION

Delete custom fields that your users don't use or need. Use your [sandbox](#) to test changes before you deploy them to your users.

[Delete Fields Documentation](#)

[Custom Fields Allowed Per Object Documentation](#)

[Field Footprint App](#)

[Data Modeling Trailhead](#)

Top Success Resource

[View All](#)

[Getting Started with Salesforce Customizations Circles of Success Webinar](#)

MONITOR LIMITS

• OPTIMIZE & MAINTAIN

Fields

- Field Usage
 - Fields On Page Layouts
 - Details Tab On Record Pages

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INCREASE ADOPTION

SUCCESS RESOURCES

Field Usage
(continued)

Object	Number of Fields
Opportunity >	1

MONITOR LIMITS

• OPTIMIZE & MAINTAIN

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- Field Usage
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INCREASE ADOPTION

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Field Usage
(continued)

Opportunity

[Back to Objects](#)

UNUSED FIELD	RELATED PAGE LAYOUT
Loss_Reason	Opportunity Layout

MONITOR LIMITS

• OPTIMIZE & MAINTAIN

Fields

- Field Usage
- Fields On Page Layouts
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INCREASE ADOPTION

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Fields on Page Layouts

OBSERVATION



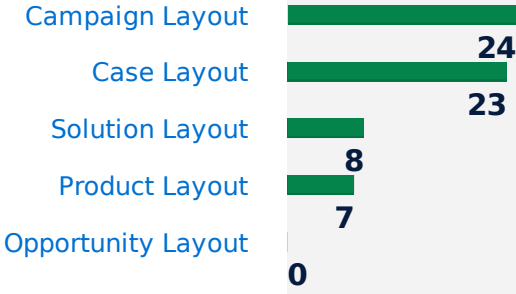
Great job! Your page layouts meet our best practices.

NUMBER OF FIELDS

● 0-59

● 60-120

● > 120



IMPACT

Excessive fields clutter your page layouts, make your implementation difficult to maintain, and increase page load time.

RECOMMENDATION

Delete custom fields that your users don't use or need. Use your [sandbox](#) to test changes before you deploy them to your users.

- MONITOR LIMITS
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INCREASE ADOPTION

SUCCESS RESOURCES

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Delete Fields Documentation

Field Footprint App

Data Modeling Trailhead

Top Success Resource

Create the User Experience Circles of Success Webinar

View All

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INCREASE ADOPTION

SUCCESS RESOURCES

Details Tab on Record Pages

OBSERVATION



Great job! Your use of the Details tab meets our best practices.

IMPACT

Excessive fields clutter your page, make your implementation difficult to maintain, and increase page load time.

RECOMMENDATION

The Details tab displays fields and sections from the page layout associated with the object. When you have a high number of fields on this tab, you can increase performance by moving the Details tab so that it's not shown by default on a Lightning record page.

MONITOR LIMITS

• OPTIMIZE & MAINTAIN

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INCREASE ADOPTION

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Details Tab on
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(continued)

[Customize Tabs on Lightning Experience Record Pages Using the Lightning App Builder Documentation](#)

MONITOR LIMITS

• OPTIMIZE & MAINTAIN

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- Unused Reports

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INCREASE ADOPTION

SUCCESS RESOURCES

Unused Reports

OBSERVATION



You have **108 unused reports**.

IMPACT

Unused reports make your implementation difficult to maintain.

RECOMMENDATION

Delete the reports that you no longer need.

[Delete a Report Documentation](#)

[Salesforce Reports and Dashboards Limits Per Edition Documentation](#)

Top Success Resource

[View All](#)

[Tech Lounge: Reporting Basics Circles of Success Webinar](#)

REPORT NAME	LAST VIEWED	LAST RUN	LAST MODIFIED
Sample Report: Document Library	Never	Never	Sep 29, 2020
Sample Flow Report: Screen Flows	Never	Never	Sep 29, 2020
Opportunity Amount by Stage (Sample)	Never	Jul 17, 2015	Sep 29, 2020
Sales Exec Closed Deals by Owner	Never	Aug 03, 2015	Sep 29, 2020

MONITOR LIMITS

• OPTIMIZE & MAINTAIN
Fields

Reports And Dashboards

- Unused Reports
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INCREASE ADOPTION

SUCCESS RESOURCES

Unused Reports
(continued)

REPORT NAME	LAST VIEWED	LAST RUN	LAST MODIFIED
Sales Exec Closed Deals QTD	Never	Aug 03, 2015	Sep 29, 2020
Sales Exec Opportunity Product Pipeline	Never	Aug 03, 2015	Sep 29, 2020
Sales Exec Pipeline	Never	Aug 03, 2015	Sep 29, 2020
Sales Exec Open Pipeline next 90 days	Never	Aug 03, 2015	Sep 29, 2020
Sales Exec Top Closed Deals	Never	Aug 03, 2015	Sep 29, 2020
Sales Exec Open Deals	Never	Aug 03, 2015	Sep 29, 2020
Sales Exec Lost Deals	Never	Aug 03, 2015	Sep 29, 2020
Cases Currently Open by Origin	Never	Aug 03, 2015	Sep 29, 2020
Cases by Origin	Never	Aug 03, 2015	Sep 29, 2020
Marketing Exec Converted Amount	Never	Aug 04, 2015	Sep 29, 2020
Marketing Exec Amount per Camp	Never	Aug 04, 2015	Sep 29, 2020
Marketing Exec Leads by Source	Never	Aug 04, 2015	Sep 29, 2020
Marketing Exec Leads by Industry	Never	Aug 04, 2015	Sep 29, 2020
Marketing Exec Campaigns by ROI	Never	Aug 04, 2015	Sep 29, 2020

Unused Reports
(continued)

REPORT NAME	LAST VIEWED	LAST RUN	LAST MODIFIED
Marketing Exec Campaign ROI by Camp Type	Never	Aug 04, 2015	Sep 29, 2020
Marketing Exec Leads by Campaigns	Never	Aug 04, 2015	Sep 29, 2020
Marketing Exec Leads Converted	Never	Aug 04, 2015	Sep 29, 2020
Marketing Exec Lead Trends by Status	Never	Aug 04, 2015	Sep 29, 2020
Marketing Exec Converted by Month	Never	Aug 04, 2015	Sep 29, 2020
Marketing Exec Converted and Won Amount	Never	Aug 04, 2015	Sep 29, 2020
Marketing Exec # of Leads	Never	Aug 04, 2015	Sep 29, 2020
Marketing Exec Conversion Rate	Never	Aug 04, 2015	Sep 29, 2020
Conversion Rate	Never	Aug 04, 2015	Sep 29, 2020
Sales Exec Bookings Trend	Never	Aug 04, 2015	Sep 29, 2020
Sales Person Current Month Open Pipeline	Never	Aug 04, 2015	Sep 29, 2020
Sales Person MTD Sales	Never	Aug 04, 2015	Sep 29, 2020
Sales Person Activity	Never	Aug 04, 2015	Sep 29, 2020
Sales Person Open Pipeline by stage	Never	Aug 04, 2015	Sep 29, 2020

MONITOR LIMITS

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Unused Reports
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REPORT NAME	LAST VIEWED	LAST RUN	LAST MODIFIED
Sales Person All Activities	Aug 04, 2015	Never	Sep 29, 2020
Sales Manager Activities	Aug 07, 2015	Never	Sep 29, 2020
Sales Manager Open Opportunities	Aug 07, 2015	Never	Sep 29, 2020
Sales Manager Top Closed Deals	Aug 07, 2015	Never	Sep 29, 2020
Sales Manager Leader Board	Aug 07, 2015	Never	Sep 29, 2020
Activities by Salesperson	Aug 07, 2015	Never	Sep 29, 2020
Sales Manager Open Pipeline	Aug 07, 2015	Never	Sep 29, 2020
Sales Manager Pipeline Next 90 days	Aug 07, 2015	Never	Sep 29, 2020
Sales Manager Closed Deals	Aug 07, 2015	Never	Sep 29, 2020
Sample Report: Sales Pipeline by Stage	Aug 07, 2015	Never	Sep 29, 2020
Sample Report: Closed Sales	Aug 07, 2015	Never	Sep 29, 2020
Sample Report: Open Cases By Priority	Aug 07, 2015	Never	Sep 29, 2020
Sample Report: Open Deals	Aug 07, 2015	Never	Sep 29, 2020
Sample Report: Pipeline By Close Month	Aug 07, 2015	Never	Sep 29, 2020

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Unused Reports
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REPORT NAME	LAST VIEWED	LAST RUN	LAST MODIFIED
Sample Report: Leads by Lead Source	Aug 07, 2015	Never	Sep 29, 2020
Sample Report: Top Accounts	Aug 07, 2015	Never	Sep 29, 2020
Sample Report: Solutions Added	Aug 07, 2015	Never	Sep 29, 2020
Sample Report: Pipeline History	Aug 07, 2015	Never	Sep 29, 2020

Note: We found 58 more unused reports. To see the status of more reports, resolve these issues, and then run Optimizer again.

MONITOR LIMITS

• OPTIMIZE & MAINTAIN

Fields

Reports And Dashboards

Unused Reports

• Unused Dashboards

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INCREASE ADOPTION

SUCCESS RESOURCES

Unused Dashboards

OBSERVATION



Your have **6 unused dashboards**.

IMPACT

Unused dashboards make your implementation difficult to maintain.

RECOMMENDATION

Delete the dashboards that you no longer need.

[Delete a Dashboard Documentation](#)

[Salesforce Reports and Dashboards Limits Per Edition Documentation](#)

Top Success Resource

[View All](#)

[Drive Metrics Using Reports and Dashboards Circles of Success Webinar](#)

DASHBOARD NAME	LAST VIEWED	LAST MODIFIED
Adoption Dashboard	Never	Sep 29, 2020
Sales Manager Dashboard	Never	Sep 29, 2020

MONITOR LIMITS

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DASHBOARD NAME	LAST VIEWED	LAST MODIFIED
Service KPIs	Never	Sep 29, 2020
Agent Supervisor Overview	Never	Sep 29, 2020
Service Executive Overview	Never	Sep 29, 2020
Marketing Dashboard	Never	Sep 29, 2020

MONITOR LIMITS

• OPTIMIZE & MAINTAIN

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Unassigned Page Layouts

OBSERVATION

 You have **2 page layouts** that aren't assigned to a record type.

IMPACT

Page layouts that aren't assigned to record types take up unnecessary space and make your implementation harder to maintain.

RECOMMENDATION

Delete unassigned page layouts in your implementation, and use your [sandbox](#) to test changes before you deploy them to your users. If you need to keep the page layout, [assign it to a record type](#).

[Page Layouts Documentation](#)

[Customize Record Details with Page Layouts Trailhead](#)

Top Success Resource

[Streamline Salesforce Experience Through Data Archival and Cleanup Circles of Success Webinar](#)

View All

UNASSIGNED PAGE LAYOUTS

[Opportunity Layout](#)

[Lead Layout](#)

MONITOR LIMITS

• OPTIMIZE & MAINTAIN

Fields

Reports And Dashboards

Custom Layouts For Objects

Unassigned Page Layouts

• Unassigned Record Types

Page Layouts Per Object

Record Types Per Object

Lightning Pages

Workflow

User Management

Custom Code

INCREASE ADOPTION

SUCCESS RESOURCES

Unassigned Record Types

OBSERVATION



Great job! You don't have unassigned record types.

IMPACT

Record types that aren't assigned to profiles take up unnecessary space and make your implementation harder to maintain.

RECOMMENDATION

Delete unassigned record types in your implementation, and use your [sandbox](#) to test changes before you deploy them to your users.

[Considerations for Creating and Updating Record Types and Picklists Documentation](#)

Top Success Resource

[View All](#)

[Streamline Salesforce Experience Through Data Archival and Cleanup Circles of Success Webinar](#)



MONITOR LIMITS

• OPTIMIZE & MAINTAIN

Fields

Reports And Dashboards

Custom Layouts For Objects

Unassigned Page Layouts

Unassigned Record Types

• Page Layouts Per Object

Record Types Per Object

Lightning Pages

Workflow

User Management

Custom Code

INCREASE ADOPTION

SUCCESS RESOURCES

Page Layouts per Object

OBSERVATION



Great job! You use page layouts according to our best practices.

NUMBER OF PAGE LAYOUTS

0-15

16-30

> 31

Opportunity
Lead
Case
Campaign

1
1
1
1

IMPACT

Unnecessary page layouts make your implementation difficult to maintain.

RECOMMENDATION

Implement a consistent page layout for as many objects as possible, and delete the page layouts that you no longer need.

[Page Layouts Documentation](#)

MONITOR LIMITS

• OPTIMIZE & MAINTAIN

Fields

Reports And Dashboards

Custom Layouts For Objects

Unassigned Page Layouts

Unassigned Record Types

• Page Layouts Per Object

Record Types Per Object

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Custom Code

INCREASE ADOPTION

SUCCESS RESOURCES

Page Layouts per Object (continued)

Top Success Resource

[View All](#)

[Streamline Salesforce Experience Through Data Archival and Cleanup Circles of Success Webinar](#)

MONITOR LIMITS

• OPTIMIZE & MAINTAIN

- Fields
- Reports And Dashboards
- Custom Layouts For Objects
 - Unassigned Page Layouts
 - Unassigned Record Types
 - Page Layouts Per Object
- Record Types Per Object
- Lightning Pages
- Workflow
- User Management
- Custom Code

INCREASE ADOPTION

SUCCESS RESOURCES

Record Types per Object

OBSERVATION



Great job! You use record types according to our best practices.

NUMBER OF RECORD TYPES

● 0-10

● 11-20

● > 21



IMPACT

Unnecessary record types make your implementation difficult to maintain.

RECOMMENDATION

Implement a consistent record type for as many objects as possible, and delete the record types that you no longer need.

[Considerations for Creating and Updating Record Types and Picklists Documentation](#)

MONITOR LIMITS

• OPTIMIZE & MAINTAIN

Fields

Reports And Dashboards

Custom Layouts For Objects

Unassigned Page Layouts

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Page Layouts Per Object

- Record Types Per Object

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INCREASE ADOPTION

SUCCESS RESOURCES

Record Types per Object (continued)

Top Success Resource

[View All](#)

[Streamline Salesforce Experience Through Data Archival and Cleanup Circles of Success Webinar](#)

MONITOR LIMITS

• OPTIMIZE & MAINTAIN

Fields

Reports And Dashboards

Custom Layouts For Objects

Lightning Pages

- Replacing Related Lists With The Related

List Quick Links Component

News And Twitter

Lightning Components On Record

Lightning Pages

Workflow

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INCREASE ADOPTION

SUCCESS RESOURCES

Replacing Related Lists with the Related List Quick Links Component

We analyze related lists only in layouts assigned to a profile.

OBSERVATION



Great job! You use related lists according to our best practices.

IMPACT

Scrolling through several related lists to find the right one is time consuming. With the Related List Quick Links component, users can hover over links to see all the related list columns without opening the View All page. Users see all options at a glance and can find the right one faster. Users can also customize the quick link order in their personal settings.

RECOMMENDATION

Replace all Related Lists components with the Related List Quick Links component. If there's a related list that should be easily accessible to users, you can add a Related List - Single component. If a page layout includes many related lists, consider moving some to a second tab.

[Standard Lightning Page Components Documentation](#)

[Customize Related Lists Documentation](#)

Top Success Resource

[View All](#)

[Streamline Salesforce Experience Through Data Archival and Cleanup Circles of Success Webinar](#)

MONITOR LIMITS

• OPTIMIZE & MAINTAIN

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Replacing Related Lists With The Related

List Quick Links Component

• News And Twitter

Lightning Components On Record

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INCREASE ADOPTION

SUCCESS RESOURCES

News and Twitter

OBSERVATION



Great job! Your News and Twitter components are already behind a tab.

IMPACT

Having the News or Twitter component directly on a page can cause the page to load slowly.

RECOMMENDATION

Move the News and Twitter components from the page to a tab.

[Customize Tabs on Lightning Experience Record Pages Using the Lightning App Builder Documentation](#)



MONITOR LIMITS

• OPTIMIZE & MAINTAIN

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• Replacing Related Lists With The Related

List Quick Links Component

News And Twitter

• Lightning Components On Record

Lightning Pages

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Custom Code

INCREASE ADOPTION

SUCCESS RESOURCES

Lightning Components on Record Lightning Pages

We only analyze Lightning pages for the record page type.

OBSERVATION



Great job! You use Lightning components according to our best practices.

IMPACT

Too many components on a page can cause it to load slowly.

RECOMMENDATION

Move some Lightning components to the Tabs or Accordion Lightning component.

MONITOR LIMITS

• OPTIMIZE & MAINTAIN

Fields

Reports And Dashboards

Custom Layouts For Objects

Lightning Pages

• Replacing Related Lists With The Related

List Quick Links Component

News And Twitter

• Lightning Components On Record

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INCREASE ADOPTION

SUCCESS RESOURCES

Lightning
Components on
Record Lightning
Pages
(continued)

[Customize Tabs on Lightning Experience
Record Pages Using the Lightning App
Builder Documentation.](#)

[Standard Lightning Page Components
Documentation](#)

MONITOR LIMITS

• OPTIMIZE & MAINTAIN

Fields

Reports And Dashboards

Custom Layouts For Objects

Lightning Pages

Workflow

- Inactive Validation Rules

[Inactive Workflow Rules](#)

User Management

Custom Code

INCREASE ADOPTION

SUCCESS RESOURCES

Inactive Validation Rules

OBSERVATION



Great job! You don't have any inactive validation rules.

IMPACT

Inactive validation rules make your implementation difficult to maintain.

RECOMMENDATION

Delete validation rules that you don't need, and use your [sandbox](#) to test changes before you deploy them to your users.

[Validation Rule Limits Documentation](#)

[Creating Validation Rules Trailhead](#)

[Process Automation Trailhead](#)

MONITOR LIMITS

• OPTIMIZE & MAINTAIN

Fields

Reports And Dashboards

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Lightning Pages

Workflow

Inactive Validation Rules

• Inactive Workflow Rules

User Management

Custom Code

INCREASE ADOPTION

SUCCESS RESOURCES

Inactive Workflow Rules

OBSERVATION



Great job! You don't have any inactive workflow rules.

IMPACT

Inactive workflow rules make your implementation difficult to maintain.

RECOMMENDATION

Delete workflow rules that you don't need, and use your [sandbox](#) to test changes before you deploy them to users.

[Lightning Process Builder Documentation](#)

[Process Automation Trailhead](#)

Top Success Resource

[View All](#)

[Transform Your Business with Automation Circles of Success Webinar](#)

MONITOR LIMITS

• OPTIMIZE & MAINTAIN

- Fields
- Reports And Dashboards
- Custom Layouts For Objects
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 - Unassigned Roles
 - Unassigned Custom Profiles
 - Custom Profiles With A Low Number Of Users
 - Unassigned Permission Sets
 - Permission Sets With A Low Number Of Users

Custom Code

INCREASE ADOPTION

SUCCESS RESOURCES

User Logins

Total Users:
1

OBSERVATION



0 users haven't logged in lately.

0 of 1 Users (0%)



30-89 Days ago	90-179 Days ago	180+ Days ago	Never Logged In
0 users	0 users	0 users	0 users

IMPACT

If users aren't managing their business in Salesforce, your teams might not be working efficiently, and your data might be at risk.

RECOMMENDATION

Determine whether these users need access to Salesforce. Deactivate accounts of former employees or anyone who doesn't need to access Salesforce.

- Deactivate (Delete) Users Documentation
- User Management Trailhead
- Data Security Trailhead

Top Success Resource

Getting Started Series: Create the User Experience Circles of Success Webinar

View All

MONITOR LIMITS

• OPTIMIZE & MAINTAIN

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Custom Code

INCREASE ADOPTION

SUCCESS RESOURCES

Administrator Permissions

OBSERVATION

For this report, we define an administrator as a user who has both Customize App and Modify All Data permissions in Salesforce.



Great job! You have an appropriate number of administrators for your implementation.

Current

1 administrators >

Recommended

1 full-time administrator for up to 30 users

IMPACT

Having too many administrators can make it more difficult to keep your settings and data secure.

RECOMMENDATION

Reduce the number of users who have the Customize App and Modify All Data permissions. Assign users those permissions only if they are responsible for maintaining and updating users and settings in your implementation.

[Edit Users Documentation](#)

[Profiles Documentation](#)

[User Management Trailhead](#)

[Data Security Trailhead](#)

Top Success Resource

[Getting Started with Salesforce Customizations Circles of Success Webinar](#)

[View All](#)

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 Permission Sets With A Low Number Of
 Users

Custom Code

INCREASE ADOPTION

SUCCESS RESOURCES

Administrator
Permissions
(continued)

USERS ASSIGNED THE CUSTOMIZE APP AND MODIFY ALL DATA PERMISSIONS

Mohan Chinnappan (mohan.chinnappan.n-7nte@force.com)

MONITOR LIMITS

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 Users

Custom Code

INCREASE ADOPTION

SUCCESS RESOURCES

Unassigned Roles

OBSERVATION



You have **1 unassigned role**.

IMPACT

Unassigned roles make your implementation difficult to maintain.

RECOMMENDATION

Delete roles that don't have active users assigned to them, and use your [sandbox](#) to test changes before you deploy them to your users.

[User Role Hierarchy Documentation](#)

[Data Security Trailhead](#)

Top Success Resource

[View All](#)

[Streamline Salesforce Experience Through Data Archival and Cleanup](#)

UNASSIGNED ROLES

CEO

MONITOR LIMITS

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 Permission Sets With A Low Number Of
 Users

Custom Code

INCREASE ADOPTION

SUCCESS RESOURCES

Unassigned Custom Profiles

OBSERVATION



You have **3 unassigned custom profiles**.

IMPACT

Unassigned custom profiles make your implementation difficult to maintain.

RECOMMENDATION

Delete custom profiles that don't have active users assigned to them, and use your [sandbox](#) to test changes before you deploy them to your users.

[Profiles Documentation](#)

[Security for Profiles Documentation](#)

[Data Security Trailhead](#)

Top Success Resource

[View All](#)

[Getting Started with Salesforce Customizations Circles of Success Webinar](#)

UNASSIGNED CUSTOM PROFILES

[Personal Banker](#)

[Relationship Manager](#)

[Advisor](#)

MONITOR LIMITS

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Permission Sets With A Low Number Of Users

Custom Code

INCREASE ADOPTION

SUCCESS RESOURCES

Custom Profiles with a Low Number of Users

OBSERVATION



Great job! You don't have profiles with a low number of users.

IMPACT

Excessive custom profiles make your implementation difficult to maintain.

RECOMMENDATION

Consolidate profiles that have a low number of active users, and delete the profiles that you no longer need.

[Profiles Documentation](#)

[Security for Profiles Documentation](#)

[Data Security Trailhead](#)

Top Success Resource

[Getting Started with Salesforce Customizations Circles of Success Webinar](#)

[View All](#)

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Permission Sets With A Low Number Of
Users

Custom Code

INCREASE ADOPTION

SUCCESS RESOURCES

Unassigned Permission Sets

OBSERVATION



Great job! You don't have unassigned permission sets.

IMPACT

Unassigned permission sets make your implementation difficult to maintain.

RECOMMENDATION

Delete permission sets that don't have active users assigned to them, and use your [sandbox](#) to test changes before you deploy them to your users.

[Permission Sets Documentation](#)

[Security for Permission Sets
Documentation](#)

[Data Security Trailhead](#)

Top Success Resource

[Getting Started with Salesforce Customizations Circles of Success Webinar](#)

[View All](#)

MONITOR LIMITS

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 - Unassigned Permission Sets
 - Permission Sets With A Low Number Of Users

Custom Code

INCREASE ADOPTION

SUCCESS RESOURCES

Permission Sets with a Low Number of Users

OBSERVATION



You have **2 permission sets** with a low number of users.

IMPACT

Excessive permission sets make your implementation difficult to maintain.

RECOMMENDATION

Consolidate permission sets that have a low number of active users, and delete the permission sets that you no longer need.

[Permission Sets Documentation](#)

[Security for Permission Sets Documentation](#)

[Data Security Trailhead](#)

Top Success Resource

[Getting Started with Salesforce Customizations Circles of Success Webinar](#)

[View All](#)

MONITOR LIMITS

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INCREASE ADOPTION

SUCCESS RESOURCES

Permission Sets
with a Low
Number of Users
(continued)

PERMISSION SET	NUMBER OF USERS	PERMISSION SET	NUMBER OF USERS
----------------	-----------------	----------------	-----------------

CLM Access	1	Lightning Scheduler Resource	1
------------	---	------------------------------	---

MONITOR LIMITS

• OPTIMIZE & MAINTAIN

Fields

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Custom Code

- Formula Fields With JavaScript Code

Multiple Apex Triggers Per Object

API Versions

New Code Using Old API Versions

My Domain

INCREASE ADOPTION

SUCCESS RESOURCES

Formula Fields with JavaScript Code

OBSERVATION



Great job! You don't have formula fields that contain JavaScript code.

IMPACT

JavaScript security issues can put your data at risk if you use JavaScript code in formula fields.

RECOMMENDATION

Remove all JavaScript code from your formula fields. Use your [sandbox](#) to test changes before you deploy them to your users.

[Build a Formula Field Documentation](#)

[Use Formula Fields Trailhead](#)

Top Success Resource

[Ask Salesforce Anything Circles of Success Webinar](#)

[View All](#)

MONITOR LIMITS

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Custom Code

Formula Fields With JavaScript Code

- Multiple Apex Triggers Per Object

API Versions

New Code Using Old API Versions

My Domain

INCREASE ADOPTION

SUCCESS RESOURCES

Multiple Apex Triggers per Object

OBSERVATION

We filtered out triggers from apps that you downloaded from AppExchange and other managed packages.



Great job! You use triggers according to our best practices.

IMPACT

Having more than one trigger on an object can cause you to reach Apex limits. Triggers can also execute in a random order.

RECOMMENDATION

If an object contains multiple triggers, consolidate them into a single trigger. If coding isn't your thing, use the [Lightning Process Builder](#) to consolidate triggers.

[Triggers Developer Documentation](#)

[Apex Triggers Trailhead](#)

Top Success Resource

[View All](#)

[Getting Started with Salesforce Live: Q&A Office Hours](#)

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Multiple Apex Triggers Per Object

• API Versions

New Code Using Old API Versions

My Domain

INCREASE ADOPTION

SUCCESS RESOURCES

API Versions

OBSERVATION



Great job! Your code is up to date.

IMPACT

API versions that are more than nine releases—or three years—old can hinder your code's performance.

RECOMMENDATION

Ask your Salesforce developer to update these elements with the current API version. Give your developer the following resources for best practices on updating code.

[Apex Release Notes](#)

[Apex Code Versions Developer Documentation](#)

[Metadata API Developer Guide](#)

[API Basics Trailhead](#)

Top Success Resource

[View All](#)

[Ask Salesforce Anything Circles of Success Webinar](#)

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API Versions

- New Code Using Old API Versions

My Domain

INCREASE ADOPTION

SUCCESS RESOURCES

New Code Using Old API Versions

OBSERVATION



Great job! Your code is up to date.

IMPACT

Out-of-date API versions don't provide the latest functionality and security features.

RECOMMENDATION

Ask your Salesforce developer to update these elements with the current API version. Give your developer the following resources for best practices on updating code.

[Apex Release Notes](#)

[Apex Code Versions Developer Documentation](#)

[Metadata API Developer Guide](#)

[API Basics Trailhead](#)

Top Success Resource

[Ask Salesforce Anything Circles of Success Webinar](#)

[View All](#)

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New Code Using Old API Versions

- My Domain

INCREASE ADOPTION

SUCCESS RESOURCES

My Domain

OBSERVATION



Great job! My Domain is enabled in your org.

IMPACT

My Domain is required before you can use single sign-on (SSO) with external identity providers or social sign-on with authentication providers, such as Google and Facebook. A subdomain name also helps you to create unique domain URL, to brand your login screen, and to preserve deep links through future org splits and migrations.

Using Lightning Experience? My Domain is also required before you can use Lightning components in Lightning component tabs, Lightning pages, the Lightning App Builder, or standalone apps.

RECOMMENDATION

[Set up a My Domain](#) name to add a subdomain to your Salesforce org URL to personalize Salesforce for your company. A subdomain is a convenient way to highlight your brand and to manage login and authentication for your org.

[My Domain Documentation](#)

[Enable My Domain Trailhead Module](#)

Top Success Resource

[View All](#)

[Getting Started with Salesforce Customizations Circles of Success Webinar](#)

MONITOR LIMITS

OPTIMIZE & MAINTAIN

• INCREASE ADOPTION

SUCCESS RESOURCES

Was this helpful?



INCREASE ADOPTION SUMMARY

Unsupported Browsers >

1
user



One user accessed Salesforce with an unsupported browser within the past 30 days. Ask users to upgrade to the latest versions of supported browsers.

Out-of-Date Browsers >

0
users



Great job! Your users access Salesforce with up-to-date browsers. Ask users to upgrade to the latest versions of supported browsers.

Inactive Chatter Users >

0%
of users



Great job! All your users have contributed to Chatter within the past 30 days. Remind them to check their Chatter accounts.

Incomplete Chatter Profiles >

100%
of users



100% of your users haven't completed their Chatter profiles. Remind users to update their information.

Files Adoption >

100%
of users



Great job! All your users have used Files in the past 30 days. Encourage users to start using Files to manage their documents.



- MONITOR LIMITS
- OPTIMIZE & MAINTAIN
- INCREASE ADOPTION

- Usage
 - Unsupported Browsers
 - Out-Of-Date Browsers
 - Inactive Chatter Users
 - Incomplete Chatter Profiles
 - Files Adoption

Improve User Experience

SUCCESS RESOURCES

Unsupported Browsers

OBSERVATION

 **One user** accessed Salesforce with an unsupported browser within the past 30 days.

IMPACT

Unsupported browsers don't give users the most stability and security when they work in Salesforce.

RECOMMENDATION

Ask users to upgrade their browser to one that supports Salesforce's Lightning Experience.

[Supported Browsers Documentation](#)

[Recommendations and Requirements for All Browsers Documentation](#)

USER	BROWSER AND PLATFORM	LAST USED
Mohan Chinnappan	Chrome 61 for iOS Browser. iPhone	Sep 29, 2020 at 03:11am
Mohan Chinnappan	Unknown Browser. Unknown	Sep 29, 2020 at 03:11am

MONITOR LIMITS
OPTIMIZE & MAINTAIN
• INCREASE ADOPTION

Usage

Unsupported Browsers

- Out-Of-Date Browsers

Inactive Chatter Users

Incomplete Chatter Profiles

Files Adoption

Improve User Experience

SUCCESS RESOURCES

Out-of-Date Browsers

OBSERVATION



Great job! Your users access Salesforce with up-to-date browsers.

IMPACT

Out-of-date browsers don't give users the most stability and security when they work in Salesforce.

RECOMMENDATION

Ask users to upgrade to the latest version of a browser that supports Salesforce's Lightning Experience.

[Supported Browsers Documentation](#)

[Recommendations and Requirements for All Browsers Documentation](#)

- MONITOR LIMITS
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Usage

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- Out-Of-Date Browsers
- Inactive Chatter Users
- Incomplete Chatter Profiles
- Files Adoption

Improve User Experience

SUCCESS RESOURCES

Inactive Chatter Users

OBSERVATION



Great job! All your users have contributed to Chatter within the past 30 days.

IMPACT

If users aren't logging in and contributing regularly, your company might not be taking full advantage of Chatter's benefits.

RECOMMENDATION

Remind users who haven't logged in to Chatter recently to check their accounts regularly. Monitor your org's Chatter engagement with [Chatter dashboards](#).

[Chatter Overview Documentation](#)

[Chatter Basics for Users Trailhead](#)

Top Success Resource

[Success with Chatter](#)

[View All](#)

- MONITOR LIMITS
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 - Files Adoption

Improve User Experience

SUCCESS RESOURCES

Incomplete Chatter Profiles

OBSERVATION



100% of your users haven't completed their Chatter profiles.

1 of 1 users

don't have profile photos

1 of 1 users

don't have “About Me” sections.

IMPACT

Users across your organization might have trouble finding who they need to talk to if users don't have complete profiles.

RECOMMENDATION

Remind users who haven't completed their profiles to update their information. Monitor your org's Chatter engagement with [Chatter dashboards](#).

[Chatter Overview Documentation](#)

[Chatter Basics for Users Trailhead](#)

Top Success Resource

[Welcome to Getting Started with Chatter!](#)

[View All](#)

MONITOR LIMITS

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• Incomplete Chatter Profiles

Files Adoption

Improve User Experience

SUCCESS RESOURCES

Incomplete
Chatter Profiles
(continued)

USER	NO PROFILE PHOTO	NO “ABOUT ME”
Mohan Chinnappan (mohan.chinnappan.n@gmail.com)	X	X

MONITOR LIMITS
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[Incomplete Chatter Profiles](#)

• Files Adoption

[Improve User Experience](#)

SUCCESS RESOURCES

Files Adoption

OBSERVATION



Great job! All your users have used Files in the past 30 days.

IMPACT

If your users aren't using Files to manage their documents, your sensitive customer data might be at risk. Salesforce Files are the best way to save, organize, and share files in Salesforce. Salesforce Files will continue to see improvements.

RECOMMENDATION

Remind your users about the benefits of using Salesforce Files to manage and collaborate on documents and files in Salesforce. Let them know that Salesforce Files lets you share and collaborate on files, store files privately, manage version updates, associate files with other records, and connect to external file systems right from Salesforce.

If your org currently uses Documents, make time to move most of your documents to Files. Your users will be more productive in Lightning Experience with all their files at their fingertips.

[Salesforce Files Documentation](#)

[Moving Documents to Salesforce Files](#)

Top Success Resource

[View All](#)

[How to Successfully Transition to Lightning Circles of Success Webinar](#)





SUCCESS
PLAN
RESOURCES

Let Us Help You on Your Journey with Salesforce

You can choose how to engage with us.

Your plan: **Standard**



Do It Myself

- Explore and set up Salesforce features with [Trailhead](#).
- Find answers about features and products in the [Salesforce Help](#).
- Connect with experts, get best practices, and follow trails with the [Success Journey Hub](#).
- Join more than two million other users in the [Success Community](#).
- Learn more about getting up and running with [Lightning Experience](#).
- Find answers to questions in the [Trailblazer Community](#).
- Get a visual tour of Salesforce features with our [videos](#).



Show Me How

- Let us help you get set up in the [Getting Started Trailblazer Community](#).
- Stay up to date on the latest and greatest Salesforce features in the [Release Readiness and Feature Adoption Trailblazer Community](#).
- Join Salesforce experts who can help you get set up in our [Q&A Office Hours webinar](#).
- Attend a [virtual event or webinar](#).
- Register for an [Ask Salesforce Anything webinar](#).
- Find [user groups near you](#).
- Register for a five-week engagement to prioritize your to-do list and execute key tasks with [Optimizer Rescue](#).



THANK YOU

Thank you for using Salesforce Optimizer! We're grateful to have you as part of the Salesforce family, and we look forward to helping you and your company achieve more with your implementation.

We want to hear your feedback! Was this report useful? How can we improve? Post your comments to our [Success community](#), and tag it with #OptimizerReportFeedback to hear from us!

Was this helpful?



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