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# Improve Your Implementation with Salesforce Optimizer



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# Improve Your Implementation with Salesforce Optimizer

Salesforce is a powerful tool, but as veteran administrators know, maintaining a suite of features can be cumbersome. Salesforce Optimizer takes the guesswork out of how to best maintain features so that they can be optimized to help your users get work done. Run Salesforce Optimizer in sandbox or production to get recommendations for feature improvement, clean up customizations, reduce complexity, and drive feature adoption. Receive a personalized report with advice and recommendations about how you can improve your implementation.

## REQUIRED EDITIONS

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Optimizer App Available in: Lightning Experience

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

### [Salesforce Optimizer App \(English Only\)](#)

#### **Features Evaluated in Salesforce Optimizer**

Salesforce Optimizer analyzes a subset of features across Salesforce. New features are added on a rolling basis throughout the release.

#### **Salesforce Optimizer Considerations**

Analyze your Salesforce org effectively by understanding Optimizer's limitations.

#### **Run the Salesforce Optimizer App**

The Salesforce Optimizer app analyzes features in an interactive and actionable format. Quickly identify issues that require immediate attention by using the sortable list view. Read through expert Salesforce recommendations to plan next steps.

## Features Evaluated in Salesforce Optimizer

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-  **Note** Salesforce Optimizer accesses only your org's metadata. That means that Optimizer evaluates only supporting data, not the data within your records or other content that you add to Salesforce.

Salesforce Optimizer Feature Availability

Feature	Available in Salesforce Optimizer App
Active Sharing Rule	✓
Active Validation Rule	✓
Active Workflow Rule Limits	✓
Admin Permissions	
API Versions	✓
Case Feed	✓
Convert Attachments to Files	✓
Critical Permission Assignments	
Custom Fields	✓
Custom Profiles with Low Numbers of Users	
Data Storage	✓
Details on Record Pages (Lightning Experience only)	✓
Disable Bug Mode	✓
Duplicate Management	✓
Fields on Page Layouts	✓
Field Usage	✓

Feature	Available in Salesforce Optimizer App
Files Adoption	✓
File Storage	✓
Formula Fields with JavaScript Code	✓
Hard-Coded URLs	✓
Inactive Chatter Users	✓
Inactive Validation Rules	✓
Inactive Workflow Rules	✓
Incomplete Chatter Profiles	
Insecure Experience Cloud site Sharing Settings	✓
Insecure Default External Access Levels	✓
Keyboard Shortcuts	
Lightning Components on Record Lightning Pages (Lightning Experience only)	✓
Lightning Sales Console	
Lightning Service Console	✓
Macros	✓
Migrating Workflow Rules to Flow Builder	✓
Multi-Factor Authentication Adoption	
Multiple Apex Triggers per Object	✓
My Domain	✓
New Code Using Old API Versions	
News and Twitter (Lightning Experience only)	✓
Notes and Attachments Related List	✓
Omni-Channel	✓
Out-of-Date Browsers	
Page Layouts per Object	✓
Path	✓

Feature	Available in Salesforce Optimizer App
Permission Sets with Low Numbers of Users	✓
Process Builder	
Profile Assignments	
Public Groups and Queues with Guest Users	
Record Types per Object	✓
Related Lists on Page Layouts (Salesforce Classic only)	
Release Updates Pending Review	✓
S-Controls	✓
Sharing Rules for All External Users	
Static Resource	✓
Unassigned Custom Profiles	
Unassigned Page Layouts	✓
Unassigned Permission Sets	✓
Unassigned Record Types	✓
Unassigned Roles	✓
Unsupported Browsers	
Unused Dashboards	
Unused Reports	
User Logins	

In Spring '25, these features were removed from the Optimizer tool.

- Critical Permission Assignments
- Custom Profiles with a Low Number of Users
- Incomplete Chatter Profiles
- Lightning Sales Console
- Multi-Factor Authentication Adoption
- New Code Using Old API Versions
- Out-of-Date Browsers
- Profile Assignments
- Public Groups and Queues with Guest Users
- Sharing Rules for All External Users

- Unassigned Custom Profiles
- Unsupported Browsers
- Unused Dashboards
- Unused Reports
- User Logins

## Salesforce Optimizer Considerations

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Analyze your Salesforce org effectively by understanding Optimizer's limitations.

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## General Considerations

Keep these considerations in mind when using Salesforce Optimizer.

- Salesforce Optimizer is available in sandbox and production environments.
- Salesforce Optimizer isn't supported in Internet Explorer 11.
- Optimizer evaluates your org's metadata only, not your records or other content you store in Salesforce.
- Not all features and customizations are evaluated.
- If you have a large Salesforce org, analysis can take more than 24 hours. After you start a run, close the app and check back later. Or, refresh the browser tab to see the latest run status. Don't run Optimizer again until the run has finished.
- Optimizer evaluates users only with these licenses.
  - Chatter Only (Chatter Plus)
  - Company Community User
  - Lightning Platform App Subscription
  - Lightning Platform - One App
  - Knowledge Only User
  - Salesforce
  - Salesforce Platform

Optimizer flags an object as unassigned if the object's page layout or record type is assigned solely to a profile with a license not in this list.

- The number of fields shown under Custom Field Limits in Salesforce Optimizer can differ from the number shown under Object Limits in the Object Manager. Optimizer counts only fields for which an admin has visibility. Also, Optimizer counts fields that are installed from managed packages, which sometimes don't count against field limits.

For an accurate count of field usage, go to **Setup | Object Manager | Object | Object Limits**.

- The Static Resource Limit report in Salesforce Optimizer always shows a limit of 250 MB per org, even

if the limit is manually increased. Salesforce Optimizer can dynamically adjust maximum limits only for [org limits available to REST API](#).

## Run the Salesforce Optimizer App

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### USER PERMISSIONS NEEDED

To run Salesforce Optimizer:

Customize Application, Modify All Data, AND  
Manage Users

Consider running Salesforce Optimizer as part of your monthly maintenance, before installing a new app, before each Salesforce release, or at least once a quarter. You can run the report as often as you want to keep on top of maintenance activities. You can set the App to run automatically on a monthly basis.

1. From Setup, enter *Optimizer* in the Quick Find box, then select **Optimizer**.
2. Enable Optimizer by allowing access, if you haven't done so already.
3. Decide if the app should automatically run and update.
4. Click **Open Optimizer**.

**!** **Important** If you have a large Salesforce org, analysis can take more than 24 hours. After you start a run, close the app and check back later. Or, refresh the browser tab to see the latest run status. Don't run Optimizer again until the run has finished.

Salesforce sends an in-app notification when results are ready. Access Optimizer results by clicking the notification. Or, return to the Optimizer in Setup to review your results.

In the App, Org Metric History is shown with graphs for file storage limits, data storage limits, and static resource limits. These graphs give a high-level visual overview for how these limits have impacted your org.

Salesforce also saves an `.xls` file in Salesforce Files. The file includes some of the information from the report:

- Feature section and subsection per the report's table of contents
- Type of feature analyzed, along with the number of items found
- Severity of observation

Use the .xls file to load the data into Salesforce to analyze it for trending and historical analysis. By uploading data into a Salesforce custom object, you can create workflow triggers and alerts when various thresholds are reached.