SALESFORCE OPTIMIZER REPORT

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.

Salesforce Optimizer Report

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Was this helpful? 👍 👎

MONITOR LIMITS SUMMARY

File Storage Limit >

LIMIT: **50 MB PER ORG**

2 MB

in use

4%

0%   70%   90%

✓ 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: **200 MB PER ORG**

1 MB

in use

1%

0%   70%   90%

✓ 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

2%

0%   70%   90%

✓ 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**

5

objects

✓ 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.

Salesforce Optimizer Report

Was this helpful? 👍 👎

MONITOR LIMITS SUMMARY

Active Validation Rule Limits >

LIMIT: **100 VALIDATION RULES PER OBJECT**

1
object

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

Salesforce Optimizer Report

Salesforce Optimizer Report

File Storage Limit

Limit:
50 MB per org

OBSERVATION

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

2 MB (4%)
▼

0   • 35 MB   • 45 MB   • 50 MB
     (70%)   (90%)   (100%)

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

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Data Management Rockstar Circles of Success Webinar

Data Storage Limit

Limit:
200 MB per org

OBSERVATION

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

1 MB (1%)

0   • 140 MB (70%)   • 180 MB (90%)   • 200 MB (100%)

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

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Salesforce Optimizer Report

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%)

| 0 | • 175 MB (70%) | • 225 MB (90%) | • 250 MB (100%) |

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

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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%)

Fund	■ **10**
Account	■ **10**
Fundo	■ **6**
Sector	▎ **1**
DreamInvest Settin...	▎ **1**

IMPACT

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

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

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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.

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 　　　　　　　　　　　　　　　　　　View All

Automate Key Business Processes with Lightning Process Builder

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.

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   ⛃ Workflow Rule Migration Trailhead
    Process Builder Trailhead

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Automate Key Business Processes with Lightning Process Builder

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Active Validation Rule Limits

Limit:
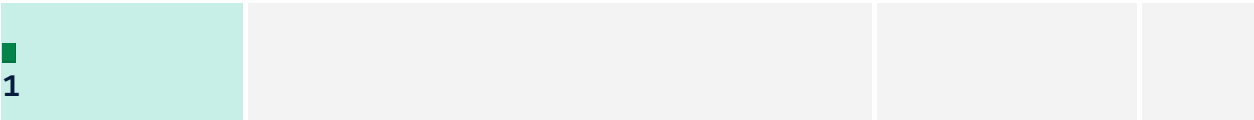**100 validation rules per object**

OBSERVATION

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

NUMBER OF VALIDATION RULES   ● 0-19   ● 20-69   ● 70-90 (>70%)   ● 91-100 (>90%)

Account

1

▲
< 20: BEST PRACTICE

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.

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

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Salesforce Optimizer Report

OPTIMIZE & MAINTAIN SUMMARY

Field Usage >

0
fields

✓ Great job! Your users regularly use the fields on your objects. Delete custom fields that your users don't use or need.

Fields on Page Layouts >

27
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 >

0
reports

✓ Great job! You don't have unused reports. Delete unused reports that haven't been run recently.

Unused Dashboards >

0
dashboards

✓ Great job! You don't have unused dashboards. Delete unused dashboards.

Unassigned Page Layouts >

1
page layout

! You have 1 page layout that isn't assigned to a record type. Assign page layouts to a record type, or delete them.

Was this helpful? 👍 👎

Salesforce Optimizer Report

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 >

9

objects

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

Record Types per Object >

1

object

✓ 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 >

1

lightning page

⚠ **One Lightning page** might not be taking advantage of the Related List Quick Links component. 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 >

1

lightning page

✓ 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 >

2

administrators

! You have a high number of administrators. Reduce the number of users who have administrator permissions.

Unassigned Roles >

18

roles

! You have 18 unassigned roles. 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.

Salesforce Optimizer Report

Was this helpful? 👍 👎

Salesforce Optimizer Report

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 >

1

permission set

⚠ You have 1 permission set 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	0	0
Apex Classes	Apex Triggers	Visualforce Pages

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

Was this helpful? 👍 👎

OPTIMIZE & MAINTAIN SUMMARY

New Code Using Old API Versions >

Number of out-of-date APIs:

2	0	0
Apex Classes	Apex Triggers	Visualforce Pages

⚠ You have 2 new code elements that use out-of-date API versions. 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.

Notes and Attachments Related List >

13
page layouts

⚠ You have 13 page layouts that use the Notes and Attachments related list. Convert attachments to files, and replace the Notes and Attachments related list with the Files related list.

Salesforce Optimizer Report

Field Usage

OBSERVATION

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

✓ Great job! Your users regularly use the fields on your objects.

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

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Salesforce Optimizer Report

Fields on Page Layouts

OBSERVATION

✓ Great job! Your page layouts meet our best practices.

NUMBER OF FIELDS ● 0-59   ● 60-120   ● > 120

Campaign Layout — 24
Case Layout — 22
Case (Support) Lay… — 22
Case (Sales) Layou… — 22
Case (Marketing) L… — 22

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.

Fields on Page Layouts (continued)

📄 Delete Fields Documentation

📄 Field Footprint App

⛰ Data Modeling Trailhead

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Salesforce Optimizer Report

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.

Details Tab on Record Pages (continued)

Customize Tabs on Lightning Experience Record Pages Using the Lightning App Builder Documentation

Unused Reports

OBSERVATION

✓ Great job! You don't have 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

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Tech Lounge: Reporting Basics Circles of Success Webinar

Salesforce Optimizer Report

Unused Dashboards

OBSERVATION

✓ Great job! You don't have 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

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Drive Metrics Using Reports and Dashboards Circles of Success Webinar

Unassigned Page Layouts

OBSERVATION

! You have **1 page layout** that isn'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

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UNASSIGNED PAGE LAYOUTS

Investor Account Layout

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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

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Page Layouts per Object

OBSERVATION

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

NUMBER OF PAGE LAYOUTS   ● 0-15   ● 16-30   ● > 30

Account	5
Opportunity	4
Lead	4
Contact	4
Case	4

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

Page Layouts per Object (continued)

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Record Types per Object

OBSERVATION

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

NUMBER OF RECORD TYPES   ● 0-10   ● 11-20   ● > 20

Account   ▬ **1**

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

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Replacing Related Lists with the Related List Quick Links Component

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

OBSERVATION

! **One Lightning page** might not be taking advantage of the Related List Quick Links component.

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

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Salesforce Optimizer Report

Replacing Related Lists with the Related List Quick Links Component (continued)

LIGHTNING PAGE	NUMBER OF RELATED LISTS
Account Record Page	7 •

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

Lightning Components on Record Lightning Pages

We only analyze Lightning pages for the record page type.

OBSERVATION

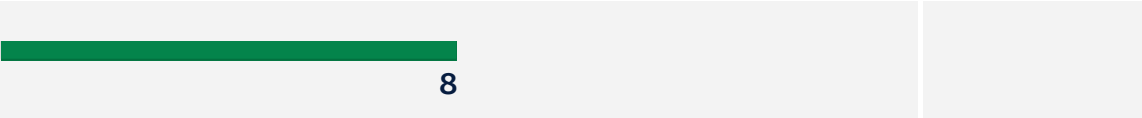✓ Great job! You use Lightning components according to our best practices.

LIGHTNING COMPONENTS	● 0-15		● 16-20	● > 20
Account Record ...	8			

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.

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

Salesforce Optimizer Report

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

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

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Salesforce Optimizer Report

Salesforce Optimizer Report

User Logins

Total Users:

2

OBSERVATION

✓ **0 users** haven't logged in lately.

0 of 2 Users (0%)

▼

5-10%	11-15%	16-100%

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

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Salesforce Optimizer Report

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.

⚠ You have a high number of administrators.

Current	Recommended
2 administrators >	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

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Administrator Permissions (continued)

USERS ASSIGNED THE CUSTOMIZE APP AND MODIFY ALL DATA PERMISSIONS

User User (test-sljr8chiklhn@example.com)

Rafael Bonoldi (rbonoldidreams@gmail.com)

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Unassigned Roles

OBSERVATION

⚠ You have **18 unassigned roles**.

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	CFO
Channel Sales Team	COO
Customer Support, International	Customer Support, North America
Director, Channel Sales	Director, Direct Sales

Unassigned Roles (continued)

UNASSIGNED ROLES	
Eastern Sales Team	Installation & Repair Services
Marketing Team	SVP, Customer Service & Support
SVP, Human Resources	SVP, Sales & Marketing
VP, International Sales	VP, Marketing
VP, North American Sales	Western Sales Team

Salesforce Optimizer Report

Salesforce Optimizer Report

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

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UNASSIGNED CUSTOM PROFILES

Custom: Support Profile   Custom: Marketing Profile

Custom: Sales Profile

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   View All

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Salesforce Optimizer Report

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   View All

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Salesforce Optimizer Report

Salesforce Optimizer Report

Permission Sets with a Low Number of Users

OBSERVATION

! You have **1 permission set** 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

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Getting Started with Salesforce Customizations Circles of Success Webinar

Permission Sets with a Low Number of Users (continued)

PERMISSION SET	NUMBER OF USERS
dreaminvest	2

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   View All
Ask Salesforce Anything Circles of Success Webinar

Salesforce Optimizer Report

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

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Getting Started with Salesforce Live: Q&A Office Hours

Salesforce Optimizer Report

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

Salesforce Optimizer Report

New Code Using Old API Versions

OBSERVATION

⚠ You have **2 new code elements** that use out-of-date API versions.

New Code Elements with Out-of-Date API Versions

2 Apex Classes >   0 Apex Triggers >   0 Visualforce Pages >

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

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Ask Salesforce Anything Circles of Success Webinar

New Code Using Old API Versions (continued)

Out-of-Date Apex Classes

NAME	API VERSION	LAST MODIFIED
FundController	44.0	May 01, 2020
FundControllerTest	44.0	May 01, 2020

Salesforce Optimizer Report

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

Salesforce Optimizer Report

Notes and Attachments Related List

OBSERVATION

! You have **13 page layouts** that use the Notes and Attachments related list.

IMPACT

In Lightning Experience, existing attachments in the Notes and Attachments related list are read only, and which actions users can take is limited. New attachments are uploaded as Files. The Files related list offers improved functionality, and it will eventually replace the Notes and Attachments related list.

RECOMMENDATION

Convert your existing notes and attachments to Salesforce Files with the Attachments to Files app. Then, on all your page layouts, replace the Notes and Attachments related list with the Files related list.

📄 Salesforce Files Documentation

Top Success Resource   View All

How to Successfully Transition to Lightning Circles of Success Webinar

PAGE LAYOUT	
Investor Account Layout	Account (Marketing) Layout
Account (Sales) Layout	Account (Support) Layout
Account Layout	Contact (Marketing) Layout

Notes and Attachments Related List (continued)

PAGE LAYOUT	
Contact (Sales) Layout	Contact (Support) Layout
Contact Layout	Opportunity (Marketing) Layout
Opportunity (Sales) Layout	Opportunity (Support) Layout
Opportunity Layout	

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 >

Recommended Feature

⭐ It looks like Chatter is disabled in your org. Enable Chatter, then run Optimizer again.

Incomplete Chatter Profiles >

Recommended Feature

⭐ It looks like Chatter is disabled in your org. Enable Chatter, then run Optimizer again.

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.

Path >

2
objects

⭐ Increase your user's productivity by enabling Path on 2 of your top 5 objects. Enable Path on these objects.

Salesforce Optimizer Report

Was this helpful? 👍 👎

INCREASE ADOPTION SUMMARY

Omni-Channel >

Recommended Feature

⭐ Your support reps might benefit from Omni-Channel. Enable Omni-Channel for your support reps.

Macros >

Recommended Feature

⭐ Your support reps might benefit from macros. Enable macros for your support reps.

Salesforce Optimizer Report

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
Rafael Bonoldi	Salesforce 224 Browser. iPhone	May 05, 2020 at 02:48am

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

Inactive Chatter Users

OBSERVATION

It looks like Chatter is disabled in your org. Enable Chatter, then run Optimizer again.

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   View All

Success with Chatter

Incomplete Chatter Profiles

OBSERVATION

It looks like Chatter is disabled in your org. Enable Chatter, then run Optimizer again.

0 of 0 users
don't have profile photos

0 of 0 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   View All

Welcome to Getting Started with Chatter!

Salesforce Optimizer Report

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

Path

OBSERVATION

⭐ Increase your users' productivity by enabling Path on 2 of your top 5 objects.

IMPACT

Path guides your users along the steps in a process, such as working an opportunity from a fresh lead to a successfully closed deal.

RECOMMENDATION

Determine whether to enable Path on these objects.

📄 Guide Users with Path Documentation   ☁ Path and Workspaces Trailhead

☁ Customize a Sales Path for Your Team Trailhead

Top Success Resource   View All

Get Going with Lightning, Now! Video

OBJECTS THAT AREN'T USING PATH

Fund   Sector

Omni-Channel

OBSERVATION

Your support reps might benefit from Omni-Channel.

IMPACT

Omni-Channel is a comprehensive customer service solution that lets your call center route incoming work items–including cases, chats, and leads–to the most qualified, available agents in your organization.

RECOMMENDATION

Determine whether to enable Omni-Channel.

Omni-Channel for Administrators Documentation

Deliver Omni-Channel Service Trailhead.

Top Success Resource

Omni-Channel Routing Review Video

View All

Macros

OBSERVATION

⭐   Your support reps might benefit from macros.

IMPACT

Support agents who use Case Feed can run macros to complete repetitive tasks, such as selecting an email template, sending an email to a customer, and updating the case status, all in a single click.

RECOMMENDATION

Determine whether to enable macros.

🛢 Set Up and Use Macros Documentation   🛢 Create Macros in Lightning Experience Documentation

🛢 Get Started with Macros Trailhead   🛢 Automate Case Management Trailhead Module

Top Success Resource   View All

Welcome to Getting Started with Service Cloud!

Salesforce Optimizer Report

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? 👍 👎