What is Salesforce Optimizer, Salesforce Health Check

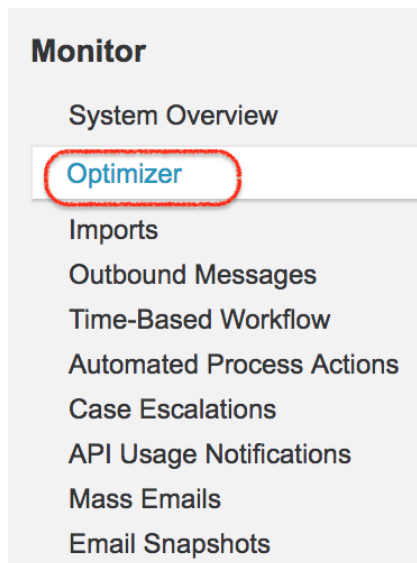## What is Salesforce Optimizer?

Salesforce Optimizer has been introduced by Salesforce.com in Summer'17 release. This Optimizer scans your entire organization and determines how your company uses Field usage & limits, Apex Triggers, page layouts, record types, validation rules, profiles and sharing and other Salesforce features, then suggests required customizations that to be performed.

Using Salesforce Optimizer, we can monitor our organization and helps to boost productivity. Before running our report we must follow the steps given below.

- Whitelist your organizations restricted IP addresses.
- Make sure you're logged in to the Org where you want to run the report.
- Verify your email settings to receive the report.

How to launch Salesforce Optimizer?

To launch Salesforce Optimizer, Navigate to Setup | Monitor | Optimizer.

Monitor

System Overview

Optimizer

Imports

Outbound Messages

Time-Based Workflow

Automated Process Actions

Case Escalations

API Usage Notifications

Mass Emails

Email Snapshots

- Click on Optimizer, now a new page will be opened where we have to run Salesforce optimizer.

Salesforce Optimizer

Salesforce Optimizer analyzes your implementation to determine ways that you can simplify customizations and drive adoption of features.

Monitor Your Org

See how your implementation stacks up to Salesforce's best practices.

Boost Productivity

Streamline your features to make them easier to use and maintain.

Get Tailored Resources

Browse resources that help you solve your implementation's unique problems.

Run Optimizer

- Click on Run optimizer.
- Now click on Allow to your basic information.

Allow Access?

Salesforce Optimizer Report is asking to:

- Access your basic information
- Access and manage your data

Do you want to allow access for prasanth.tutorialkart@gmail.com? (Not you?)

Deny   Allow

To revoke access at any time, go to your personal settings.

- Click on Allow button.

We're evaluating your implementation. This process takes a few minutes to a few hours, depending on the size of your org.

We'll email you the completed report and upload it to your Salesforce Files.

Got It

After successful evaluation, an email will be send to and the email will be attached with PDF files that can be share around Salesforce organization to bring some of the issues to light.

Salesforce Optimizer

Your Optimizer report is attached

Say hello to your very own Optimizer report.
Download it to get started.

View the report in Salesforce Files

For your convenience, you can also
access the report from your Files in Salesforce.

- Click on the link shown above to download report in Pdf, to set file sharing settings, to upload new version, to edit detail and to delete the report.
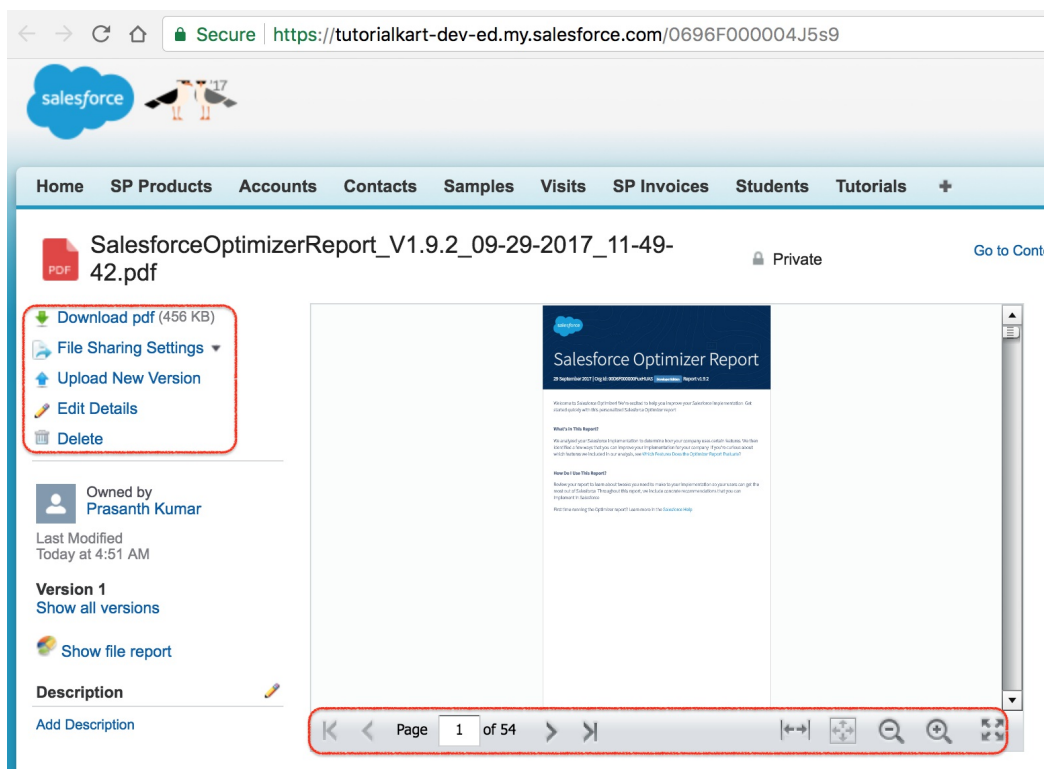
As shown above, we have got 54 pages Pdf report. Review your report to learn about tweaks you need to make

to your implementation so your users can get the most out of Salesforce. Throughout this report, we include concrete recommendations that you can implement in Salesforce.

Salesforce optimizer report content.

1. Storage.
    1. File storage limits.
    2. Data Storage limits.
    3. Static Resource limits.
2. Fields.
    1. Field Limits per Object.
    2. Field usage per Object.
    3. Field usage per Page layout.
    4. Number of Fields per Page layout.
3. Custom Code.
    1. Apex trigger per Object.
    2. API version.
    3. Fresh Code on Stale API Versions.
    4. Hard-coded URLs per Org.
4. Custom Layouts for Objects.
    1. Page Layouts per Object.
    2. Unassigned page layouts.
    3. Related lists on page layouts.
    4. Record types per object.
    5. Unassigned record types.
5. Reports and Dashboards.
    1. Unused reports.
    2. Unused Dashboards.
6. Validation Rules.
    1. Active validation Rules per Object.
    2. Inactive validation rules per Org.
7. Sharing Rules.
    1. Active sharing rules per Object.
8. Workflow Rules.
    1. Active workflow rules limits per object.
    2. Inactive Workflow rules per Org.
9. User Management.
    1. Administrator permissions.
    2. User Logins.
    3. Unassigned Roles.
    4. Unsupported browsers.
10. Profile and Permission Sets.
    1. Unassigned custom profiles.
    2. Unassigned permission sets.
    3. Profiles with 10 or fewer users.
    4. permission sets with 10 or fewer users.
11. Chatter adoption.

1. Inactive Chatter users.
2. Incomplete Chatter profiles.

12. Sales Cloud Adoption.
    1. Path.
    2. Duplicate management.

13. Service Cloud Adoption.
    1. Omni-Channel.
    2. macros.

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