



## About the Author

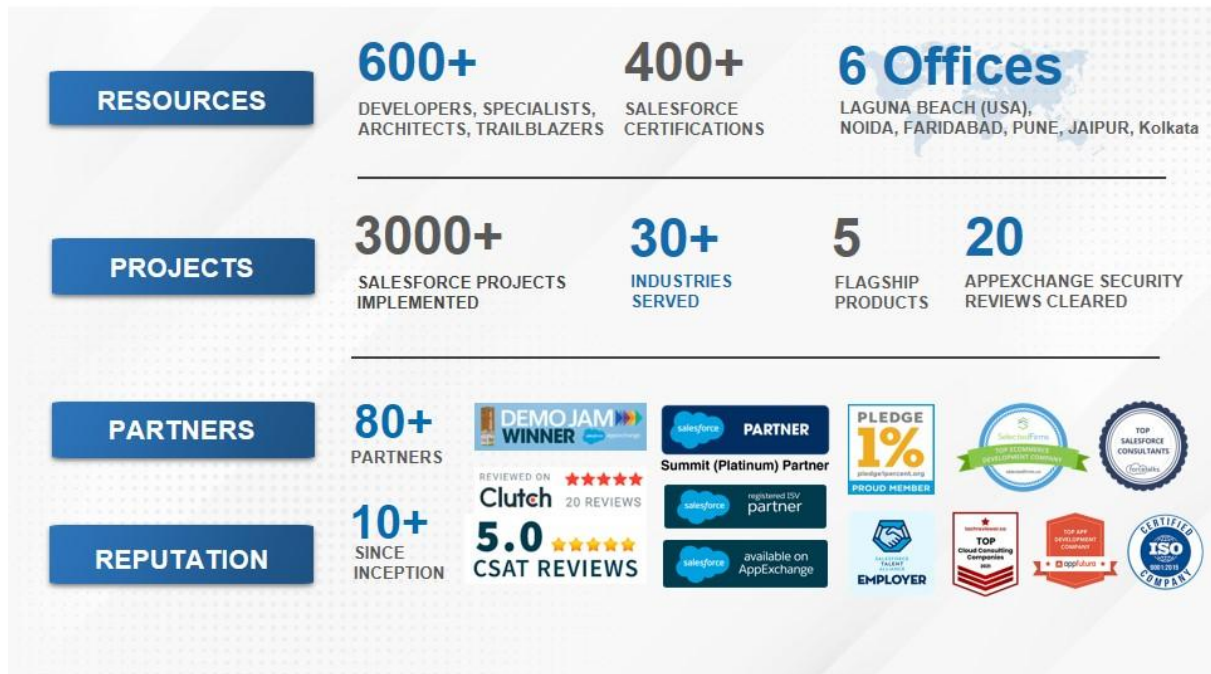


**Rohit Bhalla | COO**

**Live, Eat, and breathe Salesforce**

- Salesforce **Certified Veteran**
- **Strategist** of ISV & OEM Apps, Salesforce **Solution Consultant**
- Experienced Business **Process Implementation Expert** | 8 years, 500+ Implementations
- Salesforce **Evangelist, Speaker** at multiple Salesforce and Product Events
- Upcoming **Author** of *"11 Blunders of Bleeding Money with Salesforce Partners"*

# About Us



## Steps to Conduct Salesforce Health Check Up

It's time to have a look at the steps to conduct Salesforce Health Check

### Step 1- Verify your Salesforce Contract and Product Usage

#### Salesforce Contract

It is essential to always be aware of when the contract renews, and what exactly you have purchased from Salesforce.


Here are some points that you'll cover with this first check:

- Evaluate where you are in the buying cycle.
- Find out what products you have.
- Analyze if you're actually using those products.

If you are using Lightning Experience, go to the top right and click on the gear icon. Click the link "Your Account" and then click on "View Your Contracts". You'll be able to see a list of products your org has purchased.


BROWSE, BUY, & MANAGE

## Your Subscriptions




Browse available products and add licenses for your team.

[Browse and Buy](#)



Keep track of your accounts and review your products and contracts.

[View Your Contracts](#)



Manage your payments.

[View Your Statements](#)

[View Your Invoices](#)

[Go to Salesforce Checkout](#)

## Check Usage

Now, you can move to Setup > Company information.

**SETUP**  
**Company Information**

### User Licenses

[Buy More Licenses](#) [User Licenses Help](#)

Name	Status	Total Licenses	Used Licenses	Remaining Licenses	Expiration Date
Salesforce	Active	247	230	17	12/1/2022
Chatter Free	Active	5,000	1	4,999	12/1/2022
Chatter External	Active	500	0	500	12/1/2022
Identity	Active	100	0	100	12/1/2022

### Permission Set Licenses

[Permission Set Licenses Help](#)

Name	Status	Total Licenses	Used Licenses	Remaining Licenses	Expiration Date
(Retired) Salesforce Mobile Chat Experience	Disabled	0	0	0	12/1/2020
CRM User	Active	247	0	247	12/1/2022
Einstein Agent	Active	247	1	246	12/1/2022
Einstein Agent CWU	Active	247	0	247	12/1/2022
Einstein Search	Active	247	0	247	12/1/2022
Orders Platform	Disabled	0	0	0	8/8/2019
Sales Console User	Active	247	2	245	12/1/2022
Sales User	Disabled	0	0	0	8/8/2019
Standard Einstein Activity Capture User	Active	100	0	100	12/1/2022
Trust Card Manager	Active	10,000	0	10,000	12/1/2022

### Feature Licenses

[Buy More Licenses](#) [Feature Licenses Help](#)

Feature Type	Status	Total Licenses	Used Licenses	Remaining Licenses
Marketing User	Active	247	129	118
Offline User	Active	247	118	129
Salesforce CRM Content User	Active	247	230	17
Service Cloud User	Active	247	49	198
Flow User	Active	247	3	244
Knowledge User	Active	2	2	0

In the “User Licenses” section, you’ll find the different license types in the org. You’ll also find the number of available licenses vs. assigned licenses.

From here, you’ll get an idea of how many of each type of the main license is assigned from the Salesforce contract.

Next, you’ll find the “Feature Licenses” section that will provide you with finer detail. You’ll find here details of any additional products that are purchased for supplementing regular Salesforce licenses, like, Live Agent, the use of Knowledge, etc.

## License Usage

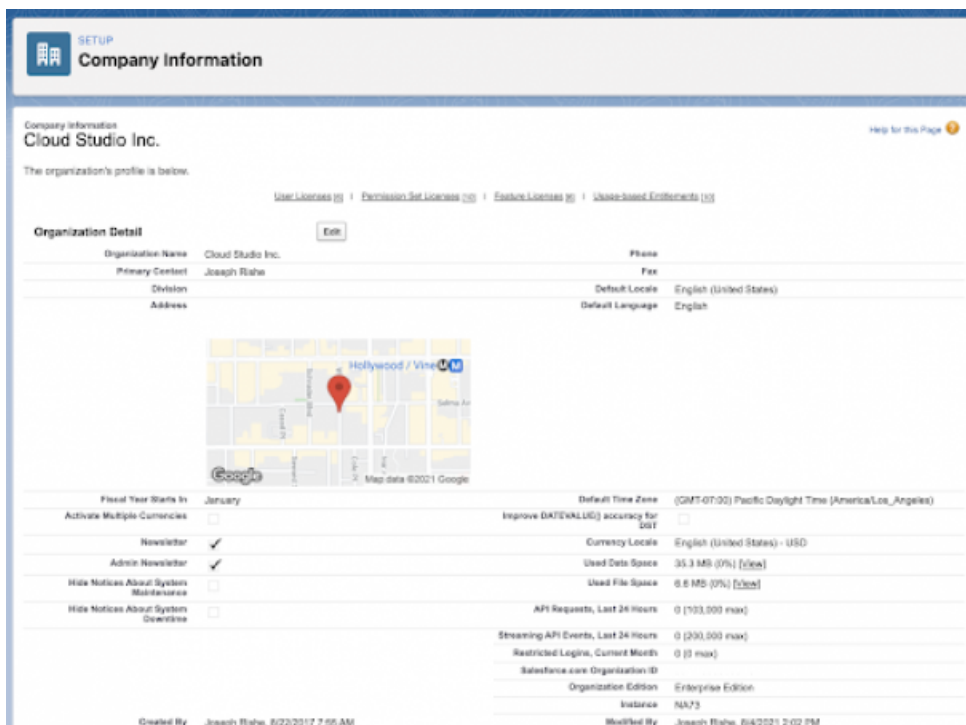
If you have any limits on license usage, you have to dive deeper and find out who is using your licenses.

You can find out by creating the report. Go to the Reports tab and select “Users” to be your Report Type.

You will automatically discover the fields you were looking for. But if not, conduct a filter based on “active” users to discover the last login date.

## Other Usage Information

On the “Company Information” page in Setup, you should focus on some important usage metrics.



The screenshot shows the "Company Information" page in the Salesforce Setup interface. The page title is "Company Information" with a sub-header "Cloud Studio Inc.". Below the title, it says "The organization's profile is below." and provides navigation links: "User Licenses (0)", "Permission Set Licenses (0)", "Feature Licenses (0)", and "Usage-based Entitlements (0)".

The "Organization Detail" section includes an "Edit" button and the following fields:

- Organization Name: Cloud Studio Inc.
- Primary Contact: Joseph Rabe
- Division
- Address
- Phone
- Fax
- Default Locale: English (United States)
- Default Language: English

Below the details is a map showing the location near Hollywood/Vine.

The bottom section contains various settings and usage metrics:

- Fiscal Year Starts In: January
- Activate Multiple Currencies: ☐
- Newsletter: ☒
- Admin Newsletter: ☒
- Hide Notices About System Maintenance: ☐
- Hide Notices About System Downtime: ☐
- Default Time Zone: (GMT-07:00) Pacific Daylight Time (America/Los\_Angeles)
- Improve DATEVALUE() accuracy for DAT: ☐
- Currency Locale: English (United States) - USD
- Used Data Space: 35.3 MB (0%) [View]
- Used File Space: 0.6 MB (0%) [View]
- API Requests, Last 24 Hours: 0 (100,000 max)
- Streaming API Events, Last 24 Hours: 0 (200,000 max)
- Restricted Logins, Current Month: 0 (0 max)
- Salesforce.com Organization ID
- Organization Edition: Enterprise Edition
- Instance: NA75

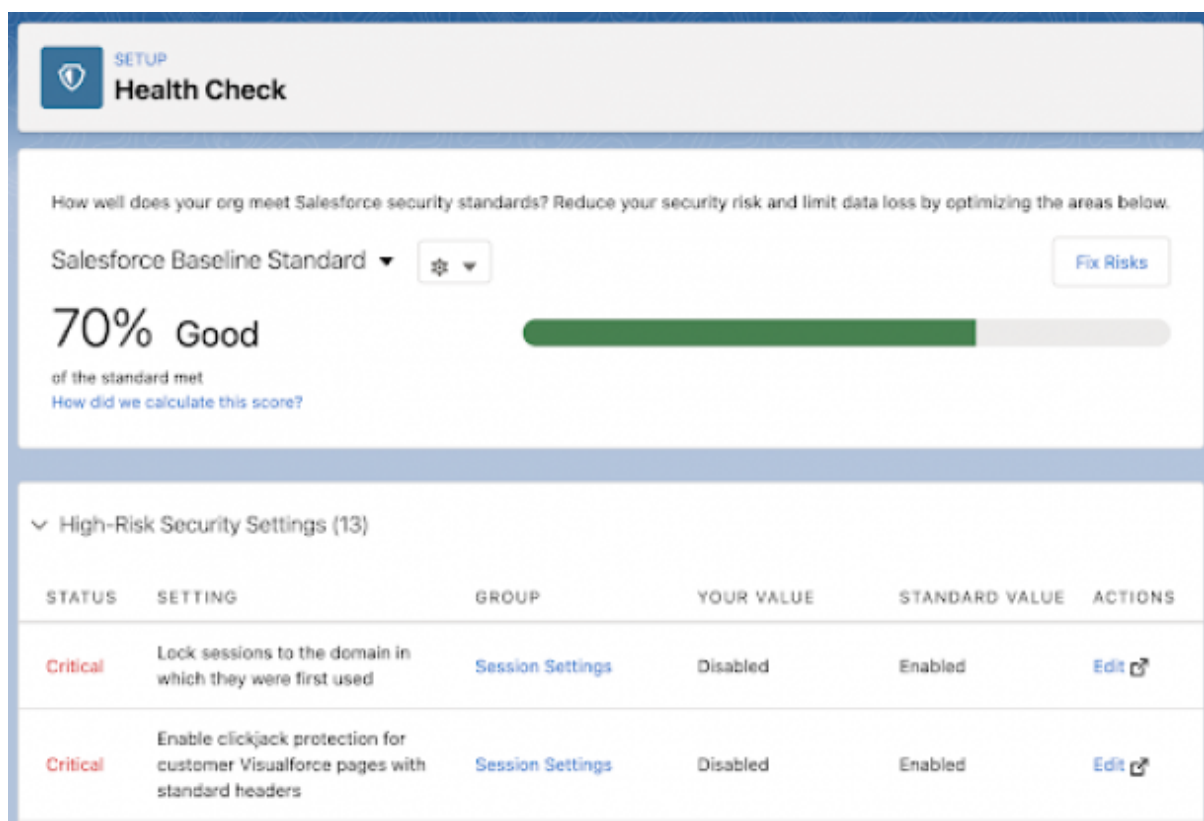
At the bottom, it shows "Created By: Joseph Rabe, 5/22/2017 7:55 AM" and "Modified By: Joseph Rabe, 5/4/2021 2:02 PM".

About halfway down the page to the right, you'll find "API Requests, last 24 hours". Here, you'll find the number of API requests against the maximum allowed number, within the timeframe of any 24-hour period. You should also consider looking at Data and File usage

## Step 2- Conduct Security Check

### Health Check

Next, you'll be covering the aspect of security. Let's start with conducting the Health Check.



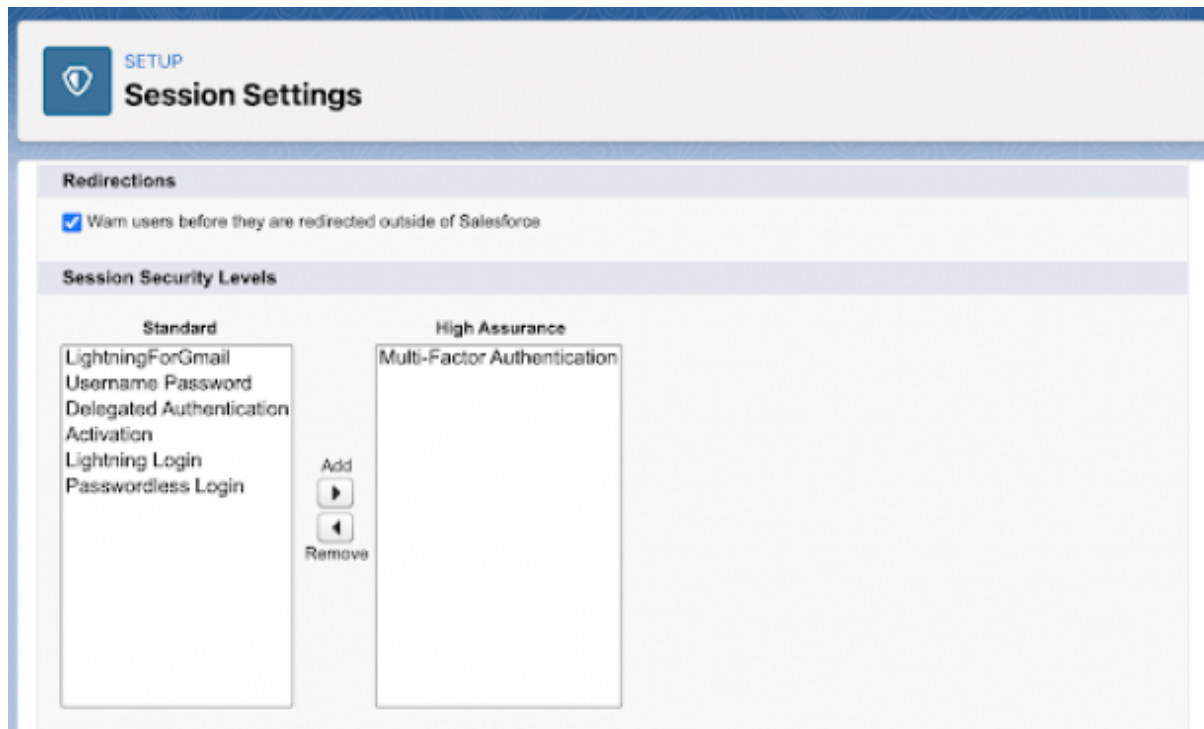
Go to Setup > Health Check. You'll find a Baseline score for your Salesforce org. You'll also find that the Security Settings are divided into three segments - High, Medium, and Low risk.

### Multi-Factor Authentication (MFA)

MFA is hands down one of the best ways to safeguard your Salesforce org from unauthorized users. It helps by pairing your password with another factor (like your email or a text) for added security.

All you have to do is go to Setup > Session Settings > Session Security Levels > Multi-Factor Authentication.





## My Domain

Go to Setup > My Domain.

With My Domain, you can make your Salesforce URL specific to your company.

It not just customized your domain but also helps to secure your org. Unauthorized users would first need to have knowledge about your “my domain” before they try to access your org.

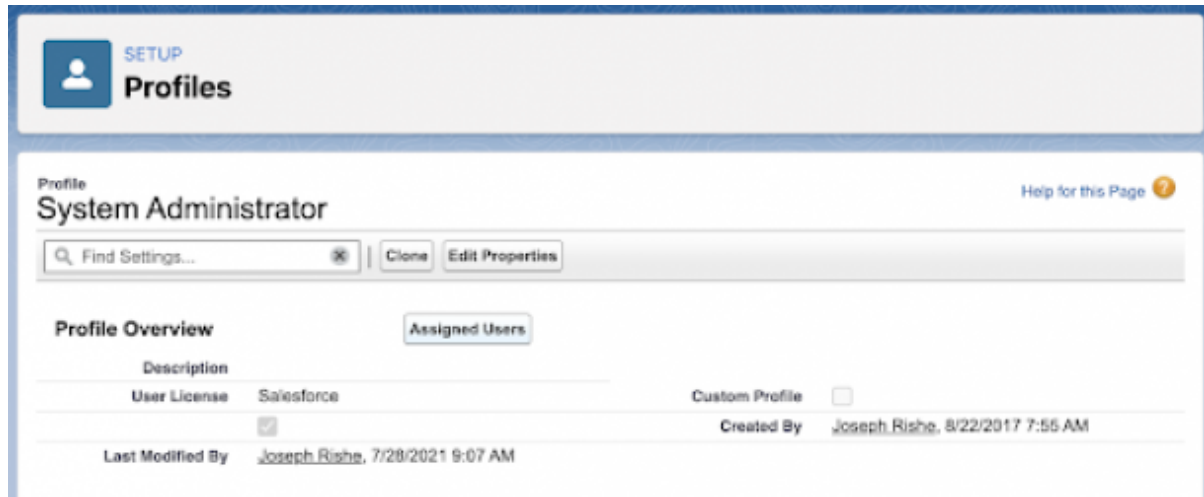
## Step 3- Check Access Controls for Users

This step helps to ensure that all users in the org have an appropriate amount of access.

### Admins

System Administrators are the users with the most amount of access in Salesforce. In a Salesforce org where the majority of users are Admins, access control can become a nightmare. That's the reason it should be corrected as soon as possible.

You have to go to Setup > Profiles > “System Administrator” profile > Assigned Users. Here you'll see which users are assigned with the Admin profile.



## Sensitive Permission

Beyond Administrators, there can be other users too with permissions that are “sensitive”, but they might not actually need those.

This is the reason that you have to ensure Profiles contain relevant permissions. You need to know which users are assigned to these profiles so you can know which users have been granted access.

To ensure this, go to Setup > Profiles.

## Step 4- Org Build Analysis

### Salesforce Optimizer

The Salesforce Optimizer is a solid tool native to Salesforce that will help you by highlighting the problem areas with your system.

Navigate to Setup > Optimizer for running the tool.

The tool helps to identify Profiles, Fields, Roles, and Permission Sets that are not being utilized. It also helps users by providing suggestions to remedy the problem.

 **SETUP**  
**Optimizer**

## Salesforce Optimizer


Analyze your implementation to find ways to simplify customizations and drive feature adoption. 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.



## Our Apps on AppExchange

▶ **AppExchange Apps**

**Our Most successful flagship**





**I App, I Number, Multiple Channels**


- ❖ SMS/MMS
- ❖ WhatsApp Messaging
- ❖ CTI (Calls)
- ❖ Ringless Voicemail
- ❖ Facebook Messenger


- ❖ Automated Texting
- ❖ 1-on-1 Conversation
- ❖ Link Tracking
- ❖ Bulk Texting & Scheduling
- ❖ Intelligent Texting (itext)

**Other offerings on AppExchange**

  
360 Merge Duplicates

  
360 Verify the Mail

  
360 Unsubscribe App

  
Textolic

## Thank You