
# About **the Author**

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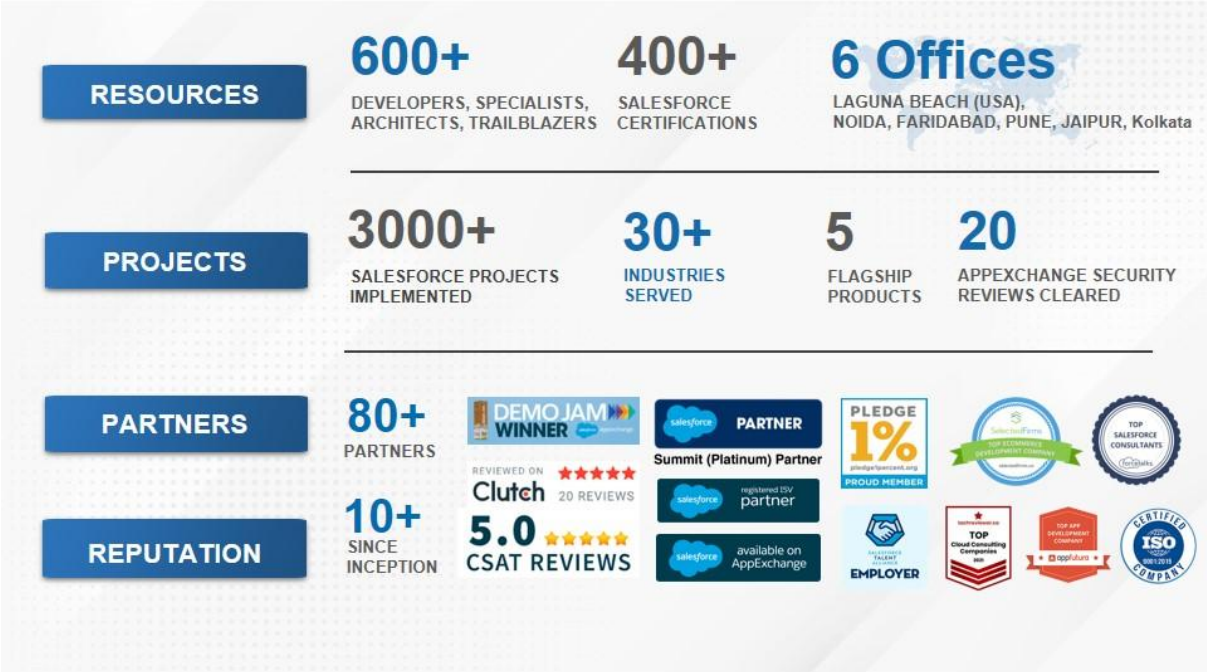
## Live, Eat, and breathe Salesforce

- 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

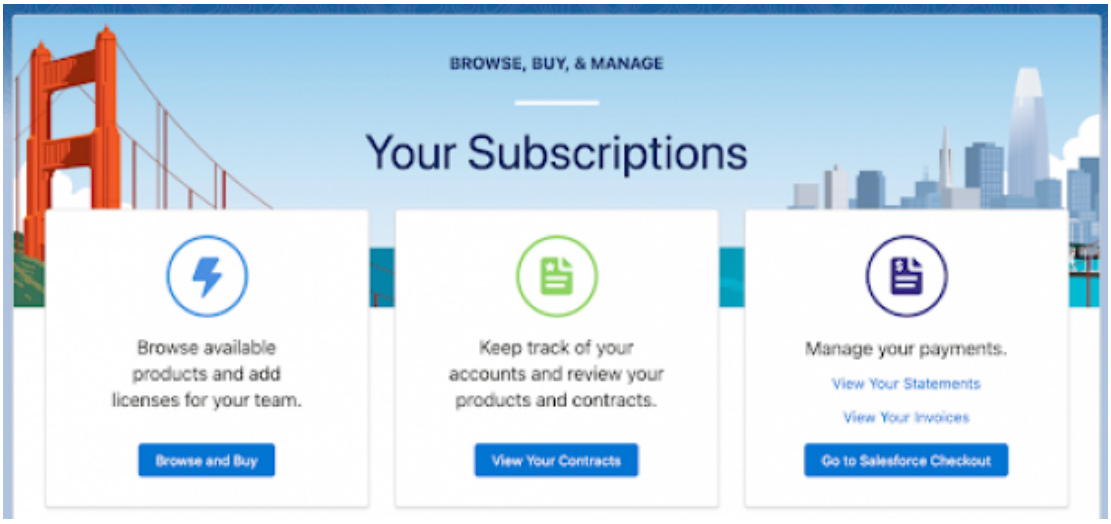
**Salesforce Contract**

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:

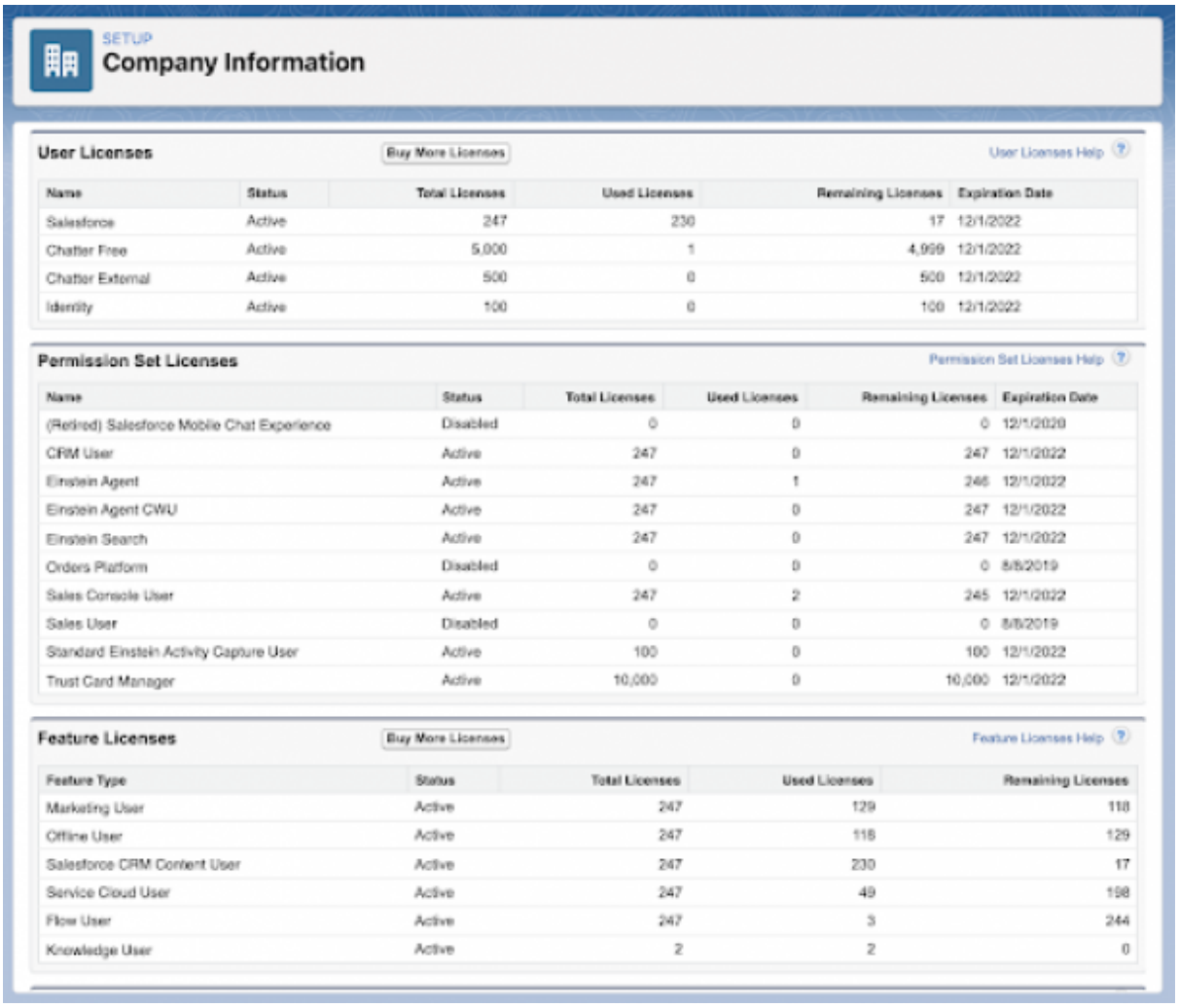
- Evaluate where you are in the buying cycle.
- Find out what products you have.
- Analyze if you're actually using those products.

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.




**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**

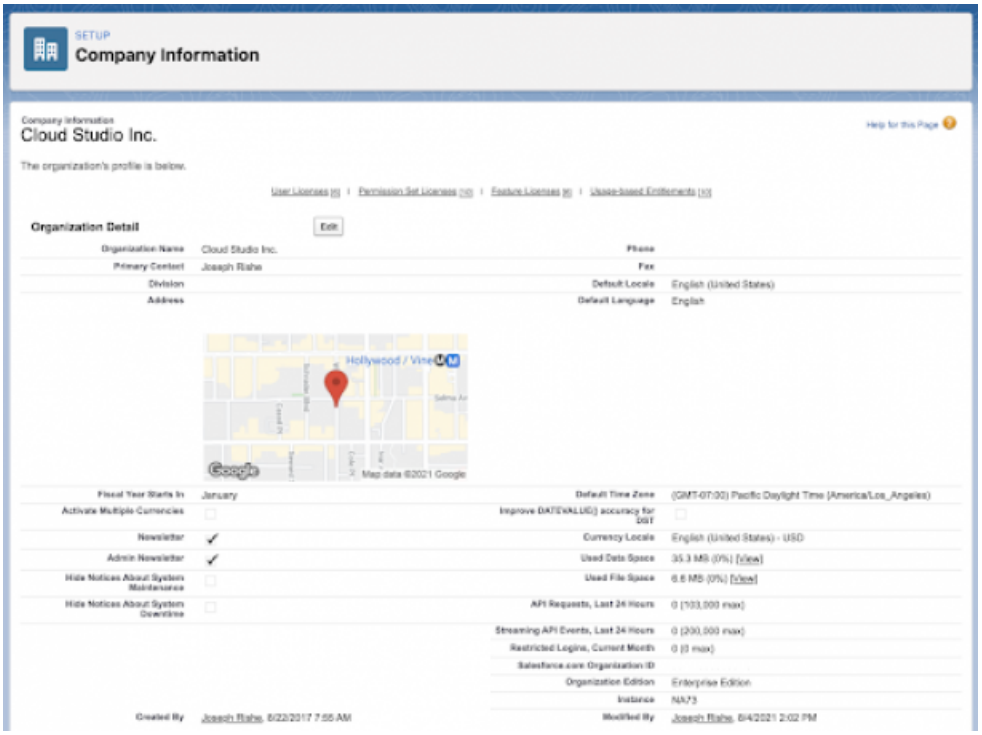
If you have any limits on license usage, you have to dive deeper and find out who is using your licenses.

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.

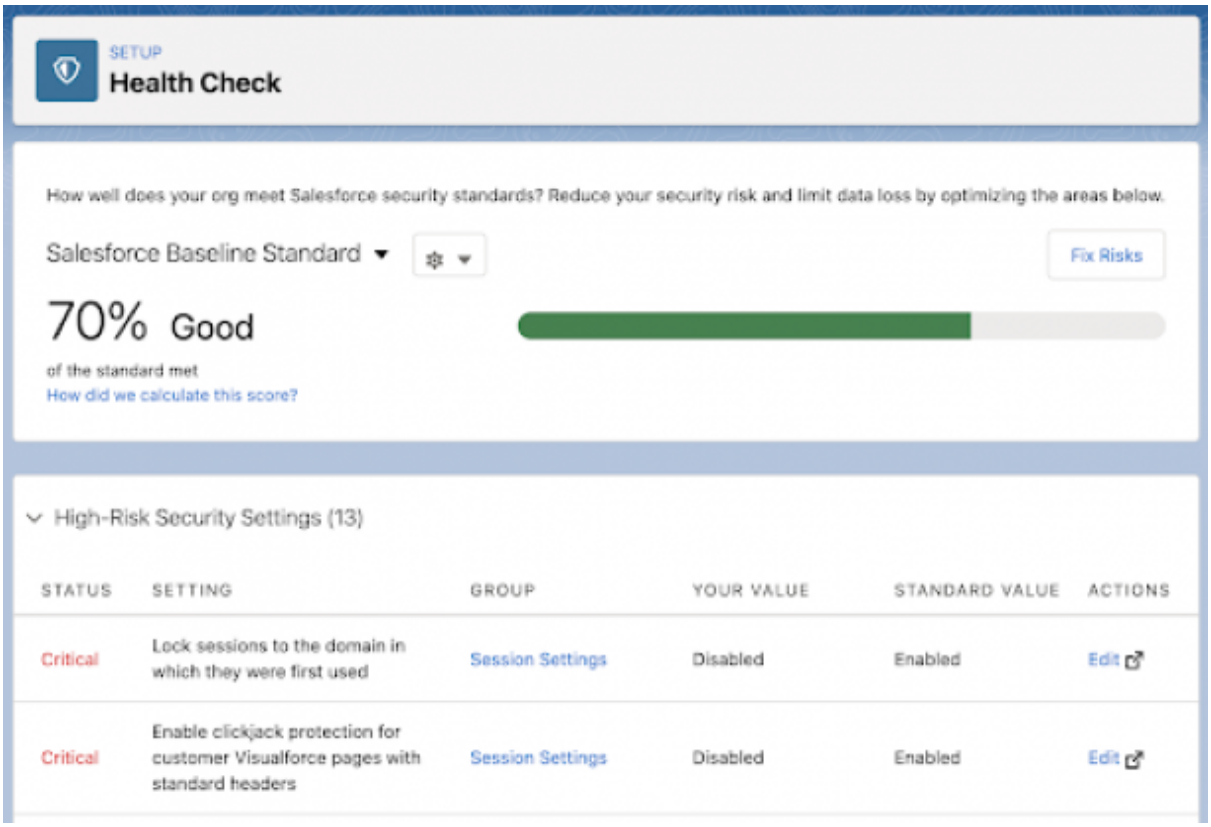


About halfway down the page to the right, you'll find "API Requests, last 24 hours". Here, you'll find the number of API requests against the maximum allowed number, within the timeframe of any 24-hour period. You should also consider looking at Data and File usage

## Step 2- Conduct Security Check

### Health Check

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

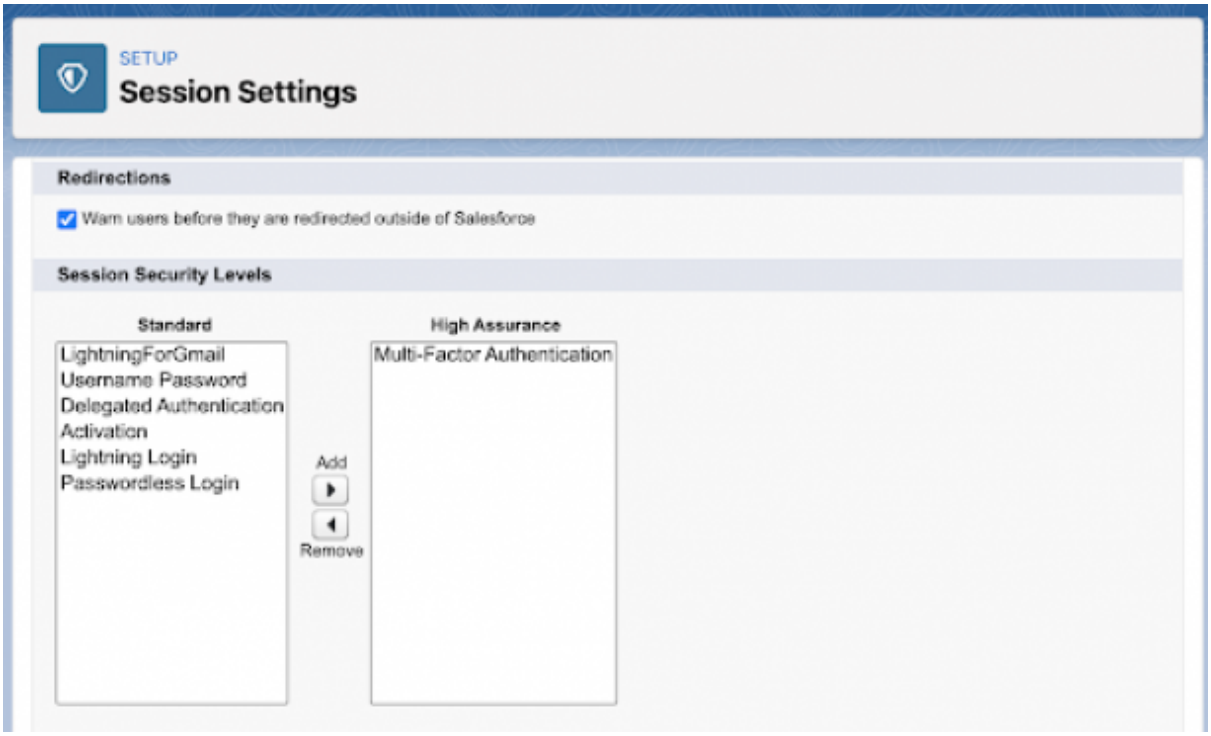



Go to Setup > Health Check. You'll find a Baseline score for your Salesforce org. You'll also find that the Security Settings are divided into three segments - High, Medium, and Low risk.

### 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.

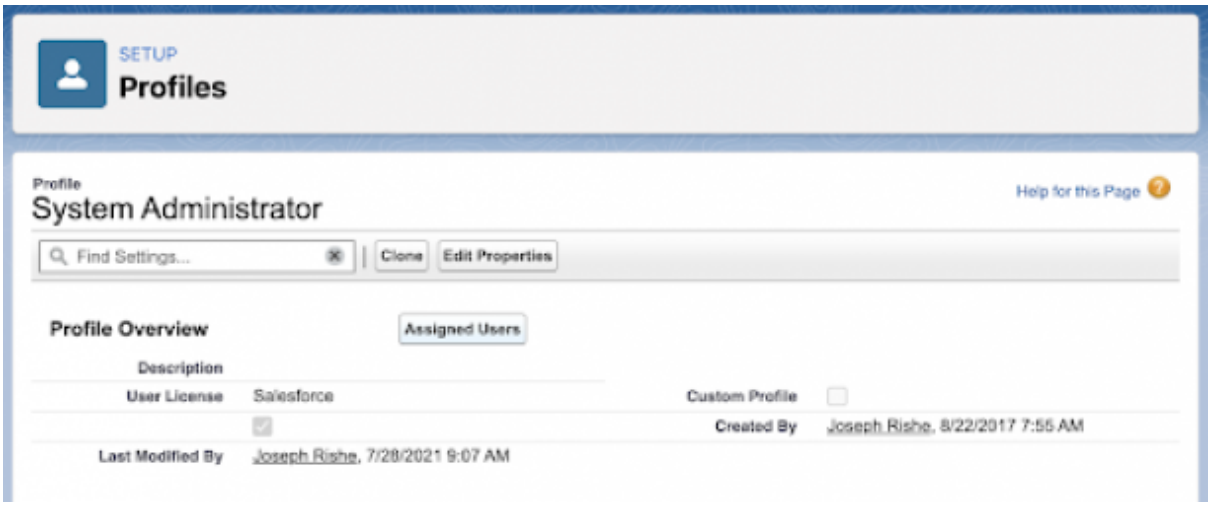
## Step 3- Check Access Controls for Users

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

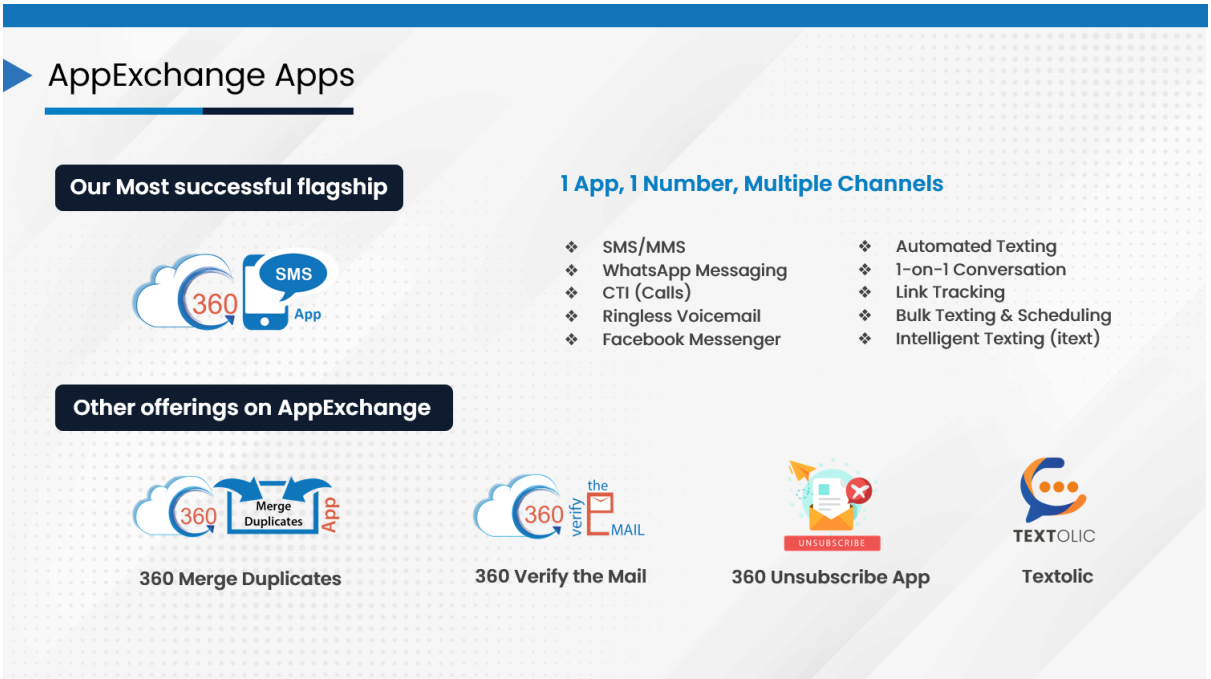
**Salesforce Optimizer**

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.


# Our Apps on AppExchange




# Thank You

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