8 Steps for a Clean Salesforce Org

metazoa

Index

Sun Life Financial
kareo
GLOBALFOUNDRIES
Pernod Ricard
Senseonics
PERFICIENT
vision. execution. value.
Micron
NATIONAL INSTRUMENTS
illumina
CLEAResult
edmentum
Ellie Mae
voya FINANCIAL
SEISMIC
elisa
BIO-RAD
XPO Logistics
carecentrix
DMCC
A-LIGN
GEARS CRM
HIGHMARK.
Cigna
Capgemini
Kindred Healthcare
John Hancock
Allianz
DART
Prudential
LAFI
MERCK
Relativity
vyaire
propel
riskonnect
Rimini Street

Intro

Salesforce orgs can become unmanageably complex over time. The complexity might stem from corporate mergers and acquisitions, poor change and release management practices, failed development projects, or disruptive administrative turnover.

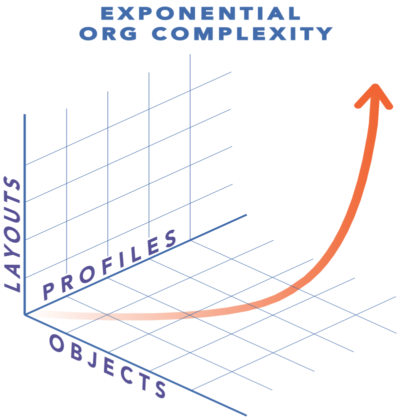
Complexity can result in slow performance, reduced agility, sluggish adoption, and IT/ business misalignment.

Older projects must be cleaned up to make room for new initiatives, or any Salesforce org can become unhealthy over time.

Snapshot provides over fifty reports to help you understand and visualize the complexity of your Salesforce Org.

Most Salesforce accounts get more complex every day.

Cleanup and optimization should become a regular part of your change and release management practice.



*"As **admins**, we know that it's ultra important to keep the database clean and manageable,"*

- Leyna Hoffer, Salesforce MVP

*"We had something that was tedious and time-consuming and was costing us a lot of money and **Snapshot** provided us with a tool that everyone was able to pickup super-fast and just did precisely what we needed it to do,"*

– September Higham, VP of Professional Services

Step 1: Monitor Field Usage

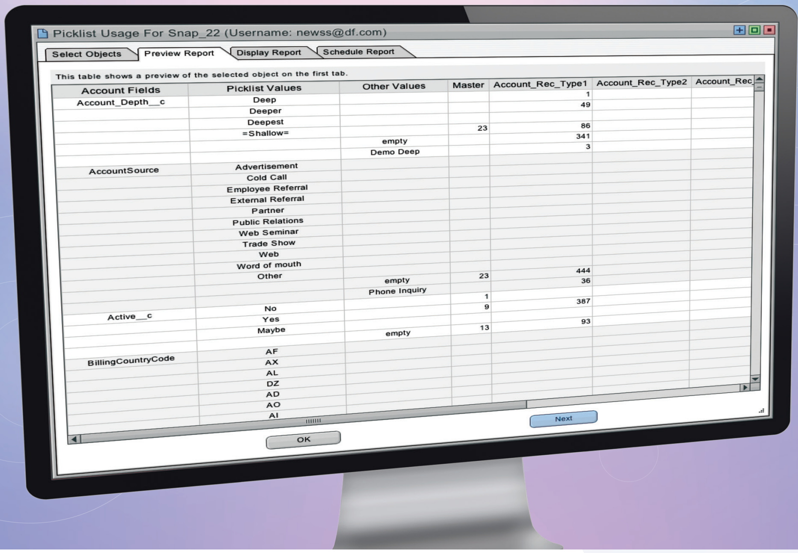
Some of the Custom Fields in your Salesforce account are more useful than others.

Some are rarely used, others not at all. One way to measure usefulness is to look at fields that are empty or contain default values.

The more distinct the field values, the more the field is being used versus fields with more uniform values, which contain lots of duplicate information.

Snapshot's Field Usage Report presents all of this information for any set of selected records.

Once this information is gathered, you can drill down to determine the usefulness on a field by field basis and us judgement on whether a field should be deleted or not.



Step 2: *Identify Picklist Usage*

The only thing more complex than fields are picklists.

Picklists are multiplexed by Record Types, and further complicated by controlling versus dependent picklists.

Picklists will have a defined list of values, but they will likely have many other values that have been entered by hand over the years.

What values should be on the defined list? What other values need to be remapped to one of the defined values? Which picklist items should be eliminated from the list entirely?

Snapshot's Picklist Usage Report displays all of this information.

The Record Types Vs. Picklists Report and the Controlling Vs. Dependent Picklists Report provide additional information about the structure and usage of picklists in your org.

*"Not only can you schedule full-org metadata **snapshots**, but to also generate comparison reporting from **snapshot** to **snapshot** and across orgs."*

- Dale Zeigler, Salesforce MVP

Step 3: *Find Forgotten Assets*

There are over 150 asset types currently handled by the Metadata API. These metadata assets describe all the customizations in your org.

But this information can also be used to discover forgotten, hidden, and inactive assets. In some cases, an asset will not be enabled by any of the Profiles or Permission Sets in the org.

In other cases, there will be no metadata references to the asset.

Many metadata assets have an “active” or “visible” flag that can be checked. The Data API can also be used to find assets that have no assigned users.

*Here is a list of common problems **Snapshot’s** Forgotten Assets Report can discover:*

- Groups not referenced by Custom Objects or Assignment Rules
- Roles, Profiles, and Permission Sets with no assigned users
- Custom Objects and Fields not referenced by other metadata assets.
- Record Types, Custom Tabs, and Custom Applications that are not visible.
- Web Links not referenced by Page Layouts or Home Page Components.
- Inactive Rules: Workflow, Approval, Assignment, Moderation, Escalation.

Step 4: *View Last Activity Date*

Some assets are enabled and properly connected to your Salesforce account, but they have not been used in a very long time.

Email Templates have a Times Used and Last Used Date field available from the Data API. Likewise, Reports have a Last Run Date.

The Refresh Date for Dashboards can be calculated from the connected Reports.

You will likely find Reports and Email Templates that have never been used, but be careful, because sometimes these objects are simply new, so be sure to also check the Created and Last Modified Dates.

Snapshot's Last Activity Date Report provides all of this information.

> *"I use **Snapshot** for a few different things - comparing org to org to see what things are different and to run reports to help with org cleanup and maintenance. I highly recommend this tool for anyone that has a development cycle of different orgs, and they are trying to keep track of the moving parts."*
>
> ***– Yelena Slobard, Salesforce Consultant***

Step 5: *Manage Profiles & Permissions*

Every user has a Profile that defines what they can see and do.

Profile permissions include Application and Tab Visibility, Apex Class and Page Access, Object and Field Permissions, User and Custom Permissions, and Layout Assignments.

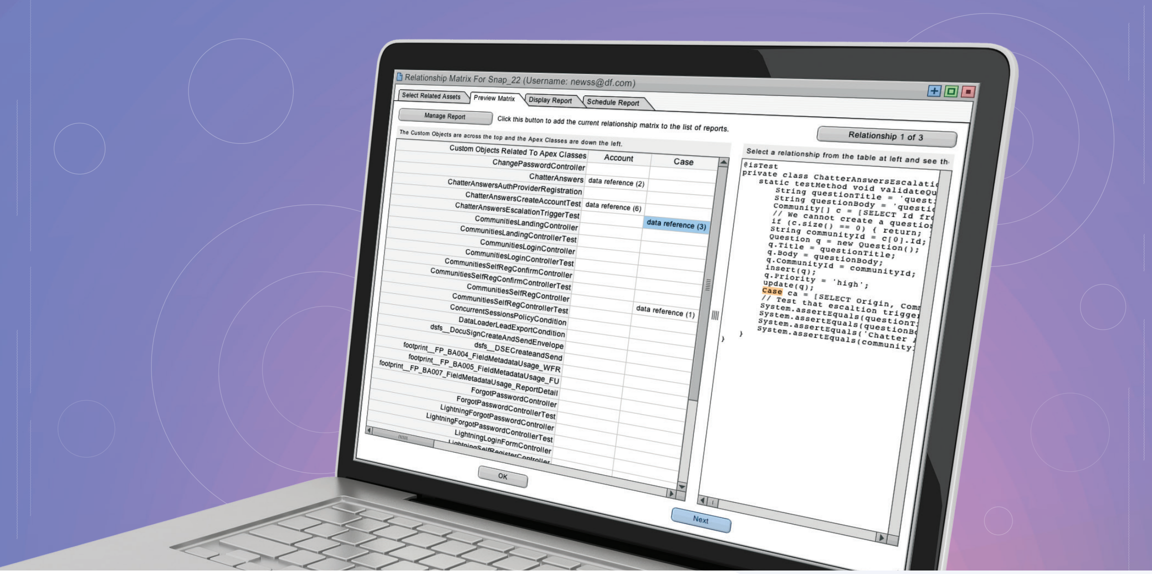
An administrator can also assign any number of Permission Sets to a user.

Permission Sets are similar to Profiles. They are used to grant additional permissions for special situations.

Profiles and Permission Sets are the key junction object that manage complexity at the heart of a Salesforce account.

Snapshot allows you to visualize Profiles and Permission sets with mass edit and user assignment capabilities.

Detailed reporting makes it easy to compare user profiles and manage permission sets across multiple orgs.



Step 6: *Understand Metadata Relationships*

Sometimes old projects and systems need to be removed from a Salesforce account. Maybe they are no longer in use, or perhaps they are being replaced by a new project.

If the project is a Managed Package, then removal is simple, but be aware that Managed Packages can contain unpackaged customizations that will also be removed when the package is uninstalled.

Unmanaged Packages are more likely to be tangled up with the Salesforce account because their assets can be customized directly without any kind of namespace to help identify them.

A much more complex situation occurs when a project is built out of unpackaged assets and customizations.

In this situation, understanding the metadata relationships and constructing with the ***Snapshot*** Relationship Matrix Report can be very helpful.

By keying on unique names, all of the related assets in a project can often be identified in the sea of unpackaged assets.

The Search Palette in the View Assets dialog can also find related assets. Then the entire project can be removed from the org, roots and all.

Step 7: User Connection Cleanup

Administrators need a clear picture of the connections between active/ inactive Users and their Salesforce Org.

There are permission assignments that control what Users can see and do. Users that are a member of a role, group, or queue can also have access to sensitive data.

There are important metadata assets that are connected to individual usernames and also store raw email addresses that are used for notifications and approvals.

Users can also be the owners of both standard and custom objects. There are over 40 different places for users to hide out in Salesforce.

Here are some of the different types of connections:

- User Permissions
- Data Connections
- Metadata Links
- Email addresses
- Team Members

In order to assist admins with this task, ***Snapshot*** has a report called User Connection Cleanup.

This report will document all of the connections between active and inactive Users and your Salesforce Org. You can select the connection types that you want to focus on, or choose all types.

This report interface can also clean up these connections. Various objects are deleted and in other situations the inactive user is replaced with an active one. And, all of the objects owned by an inactive user can be transferred to another User as well.

Understanding the connections between users and your Salesforce Org is a vital part of org management, compliance, and security.

Step 8: *Follow Org Management Best Practices*

Here are some org management best practices that every organization should have in place to ensure that their Salesforce Org is clean and optimized.

- Identify problematic assets that need to be cleaned up or optimized.

- Test what happens when these customizations are deleted in a Sandbox.

- Communicate to other users what customizations are being removed.

- Restrict access to the assets with user Profiles or by disabling the assets.

- Monitor the impact of the changes before actually deleting the assets.

- Decommission the assets with change and release and org management software.

The adoption of an effective change and release and org management practice will ensure that your Salesforce org remains healthy. In fact, org cleanup and optimization should become a regular priority in the release cycle.

Snapshot provides extremely powerful tools that can help, including powerful interfaces for Taking Snapshots and Deploying Metadata.

These tools will ensure that your Salesforce org continues to grow with new capabilities and robust user adoption but without crippling complexity.

Sun Life Financial

kareo

GLOBALFOUNDRIES

Pernod Ricard

Senseonics

PERFICIENT
vision. execution. value.

Micron

NATIONAL INSTRUMENTS

illumina

CLEAResult

edmentum

Ellie Mae

voya FINANCIAL

SEISMIC

elisa

BIO-RAD

XPO Logistics

carecentrix

DMCC

A-LIGN

GEARS CRM

HIGHMARK

Cigna

Capgemini

Kindred Healthcare

John Hancock

Allianz

DART

Prudential

LAFI

MERCK

Relativity

vyaire

propel

riskonnect

Rimini Street

Join the **Thousands** of Salesforce Professionals!

Metazoa Snapshot is a comprehensive Org management solution to help maintain, manage, clean up, and optimize your Salesforce Orgs.

With clicks, not code, Snapshot provides best practices for Admins and Developers working together to keep their Org optimized and running smoothly while expanding the Salesforce platform.

metazoa

INFO@METAZOA.COM

Find us on the Salesforce AppExchange.