



# Caravel Salesforce Health Check

Salesforce orgs grow as quickly your company grows and increase in complexity as more features are added and used. Your Salesforce org's health is just as important as the health of your sales pipeline, last quarter's finances, or customer satisfaction. Caravel's new Health Check package allows us to evaluate your org's health from many perspectives to ensure it can continue to scale, grow, and perform at its best.



Our new package utilizes the Tooling and Metadata APIs to quickly analyze key areas of focus and report on them in an intuitive and interactive interface.

## Tooling and Metadata APIs



**FIELD USAGE  
REPORTER**



**APEX TRIGGER AND  
FLOW ANALYSIS**



**SECURITY  
COMPLIANCE SCAN**



**INSTALLED PACKAGE  
BROWSER**



**APEX CODE  
ANALYSIS**



**APEX TEST  
EXECUTION**

# Features

## Field Usage Reporter

Over time as business processes change, custom fields to support those processes can become deprecated or simply never usage. Excessive fields can not only degrade system performance, but they can clutter page layouts and slow down high performing teams. By analyzing how fields across all your data are utilized, we can streamline page layouts, remove unnecessary fields, improve load times, and enhance user navigation. Ultimately, this will lead to a healthier org and can even improve your data quality, causing positive downstream impacts in the business.

Filter Options

Fields to Include

Both Standard & Custom

☒ Include Required Fields

☒ Include Formula Fields

Apply

Field Analysis Fill Rates Summary

Fill Rate Buckets

Percent Filled	Number of Fields
0%	41
0% - 1%	45
1% - 10%	18
10% - 25%	8
25% - 45%	2
45% - 67%	2
67% - 90%	13
90% - 100%	65

Export to Excel

Excel filename

Export.xlsx

Export All Objects

Export Current Object

Field Analysis Details

Search

Search by field name

Sort By

Field Label (A-Z)

Field Name	Data Type	Required?	Custom?	Populated Count	Percent Populated
Account Description	Multiline Text			22	0.06%
Account Fax	Phone Number			0	0%
Account Group	Lookup/Master Detail		✓	25563	74.37%
Account Name	Text	✓		34372	100%

## Apex Trigger and Flow Analysis

Salesforce lets admins and developers create powerful automations using flows and custom apex that improve user experience and simplify everyday tasks. Caravel's Health Check tool can analyze these automations and provide insight into their complexity and usage. Apex triggers and flows which do not follow best practices or are too complex can be more closely analyzed while skipping automation that is already in a healthy and performant state. This enables us to optimize existing processes, clean up old automation, and improve your org's performance for users and system integrations while increasing stability of the platform.

Record Triggered Flow Summary

Include Managed Flows

Active

Flows List

	Object Name	Flow Count
Details	Account	8
Details	Account Contact Relationship	2
Details	Assist Credit	4
Details	Case	5
Details	Contact	1
Details	Email Message	1
Details	Engagement	1
Details	Job	4

Object's Flows

Opportunity

Opportunity - Add Inside Team Member

Before Insert Only

Complexity Score: 2

Disabled

Record Updates: 1

Opportunity - RT - After - SEC Approval Check

After Insert or Update

Complexity Score: 28

Active

Actions: 1

Decisions: 5

Assignments: 4

Record Lookups: 2

## Security Compliance Scan

Understand the state of your org's security by leveraging Salesforce's security analysis across over 35 different settings. This package puts you in control of your org's security to ensure both your corporate and customers' information is safe and secure with the ability to review settings such as MFA, password policies, and encryption key size. Quickly and easily view a report of non-compliant settings grouped by severity along with minimum recommended settings to meet Salesforce best practices.

### Security Scan

Show All Risks Rescan

Security Score  
**88%**

High Risk: 1 Medium Risk: 4 Low Risk: 0

#### High-Risk Settings

Status	Setting	Group	Your Value	Standard Value
Warning	Number of Objects with Default External Access Set to Public	Sharing Settings	1	0

#### Medium-Risk Settings

Status	Setting	Group	Your Value	Standard Value
Critical	Require a minimum 1 day password lifetime	Password Policies	Disabled	Enabled
Critical	Force relogin after Login-As-User	Session Settings	Disabled	Enabled
Critical	Enforce login IP ranges on every request	Session Settings	Disabled	Enabled
Critical	Administrators Can Log in as Any User	Login Access Policies	Enabled	Disabled

#### Informational Settings

Status	Setting	Group	Your Value	Standard Value
Critical	Require permission to view record names in lookup fields	User PII Settings	Disabled	Enabled
Warning	Number of Objects to which Guest User Profiles have Read Access	Guest User Access	9.0	4.0
Warning	Key Size	Certificate & Key Management	2048	4096

## Installed Package Browser

The AppExchange is a powerfully unique tool to Salesforce that gives admins the ability to add features to the org with low/no-code solutions. Our package browser generates a list of all the packages installed in the org to review and take action on. Too many unused packages can degrade performance and may cause users frustration with unnecessary or poorly configured tools.

### Installed Packages Summary

#### Package List

	Name	Version	Managed?	Namespace Prefix
<a href="#">See Details</a>	Box for Salesforce	3.96.2.1	Yes	box
<a href="#">See Details</a>	CloudAnswers Report Sender	1.81.0.18	Yes	analyticsengine
<a href="#">See Details</a>	Declarative Lookup Rollup Summaries Tool	2.19.0.8	Yes	dlrs
<a href="#">See Details</a>	DevOps Center	6.4.0.279	Yes	sf_devops
<a href="#">See Details</a>	Field Trip	2.10.0.1	Yes	Field_Trip
<a href="#">See Details</a>	Files Attachment Notes	1.34.0.1	Yes	fan_astrea
<a href="#">See Details</a>	GS_Sales_Reports_Dashboards	1.0.0.1	-	
<a href="#">See Details</a>	HubSpot Integration	3.0.0.1	Yes	HubSpot_Inc
<a href="#">See Details</a>	Introhive	5.31.0.1	Yes	IntroHive
<a href="#">See Details</a>	Org Check	3.2.0.1	Yes	orgcheck
<a href="#">See Details</a>	PMT	1.8.1.1	Yes	inov8

### CONTACT US

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**CARAVEL**  
BPM Technology Solutions

Static Apex Code Analysis

Clean code is easier to maintain and less error-prone. Our code analysis can highlight warnings of your code being too complex, difficult to maintain, unsecure, or error prone all sorted by severity. These reports can arm you with the knowledge needed to reduce the possibility of having unexpected errors occur and refactor code that does not follow best practices without needing to manually review every line of code by hand.

Apex Test Results

Apex unit tests are the first line of defense against production defects that can range from a minor inconvenience to a complete system failure. With two clicks, all tests in the org can be executed to ensure the functional requirement driven health of your Apex codebase. Code coverage reporting can highlight areas of the codebase that are not well protected by rigorous unit tests. Failed tests provide information about their failure that can be reviewed to triage and diagnose the issue before fixing it.

Apex Tests

Refresh List

Stop All Tests

Expand All

Collapse All

<input type="checkbox"/> Class/Method Name	Status	Run Time (ms)	Result
<input type="checkbox"/> > BackfillCaseLastActivityDateBatch_Test	Processing	1840 ms	1/1 Passed - 1 Total
<input type="checkbox"/> > ChangePasswordControllerTest	Queued		
<input type="checkbox"/> > CommunitiesLandingControllerTest	Queued		
<input type="checkbox"/> > CommunitiesLoginControllerTest	Queued		
<input type="checkbox"/> > CommunitiesSelfRegConfirmControllerTest	Queued		
<input type="checkbox"/> > CommunitiesSelfRegControllerTest	Processing	14 ms	1/1 Passed - 1 Total
<input type="checkbox"/> > CRVL_ActionResponse_Test	Queued		
<input type="checkbox"/> > CRVL_AutomationReporterController_Test	Processing	916 ms	1/1 Passed - 1 Total
<input type="checkbox"/> > CRVL_CustomAssert	Queued		
<input type="checkbox"/> > CRVL_Exception_Test	Processing	27 ms	1/1 Passed - 1 Total
<input type="checkbox"/> > CRVL_FieldAnalysisReportController_Test	Processing	3277 ms	1/1 Passed - 1 Total
<input type="checkbox"/> > CRVL_FieldUsageBatch_Test	Queued		
<input type="checkbox"/> > CRVL_FlowMetadataService_Test	Queued		
<input type="checkbox"/> > CRVL_HttpResponseFactory	Completed		

User and Role Overview

Bundled in the Health Check are a number of premade reports to provide insight into your users: login history, profile assignment, and users who have never logged in. Incorrectly granted roles can prevent an employee from effectively performing their job or even expose sensitive customer data to the improper individuals. Our role and sharing analysis tool will show what roles exist in your org and how many users are assigned to them.

Report: Users

User Logins by Date and Browser

This report has more results than we can show (up to 2,000 rows). Summary information is calculated from full report results.

Total Records

19,200

Login Date	Q3 CY2024	Q2 CY2024	Q1 CY2024	-	Total
Browser	Count	Count	Count	Count	Count
-	0	0	0	52	52
Chrome 100	1	3	10	0	14
Chrome 102	0	0	1	0	1
Chrome 104	0	1	0	0	1
Chrome 107	0	0	1	0	1

## Honest to a Fault

The consulting industry is plagued with firms willing to take advantage of a customer's inexperience around budget, deployment timeline, and software knowledge. At Caravel, we are upfront and honest about everything. The reality is that implementing enterprise business applications (if done right) takes time and money. Caravel would rather forfeit jobs to other firms promising cheaper pricing and unrealistic timelines than cut corners and costs at the detriment of the customer. Our goal is to meet customer expectations on Day 1 by finding the best fit for an implementation, helping to set customers up for success from the start.



**FULL-SERVICE FIRM.**



**EXPERTISE.**



**TEAM.**



## About Caravel

Caravel has served more than 500 clients over the past decade, providing a comprehensive range of services, including accounting, strategy, business processes and technology selection. Our commitment to excellence drives us to continually improve and refine our approach, helping our clients solve complex problems with modern tools.

Caravel is proud to be a part of the technology services group of BPM LLP, a top 40 accounting and advisory firm. With our team by your side, you can unlock your business's true potential and drive success in an ever-evolving marketplace.

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