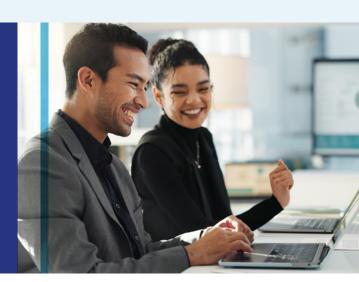


# **Caravel Salesforce Health Check**

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

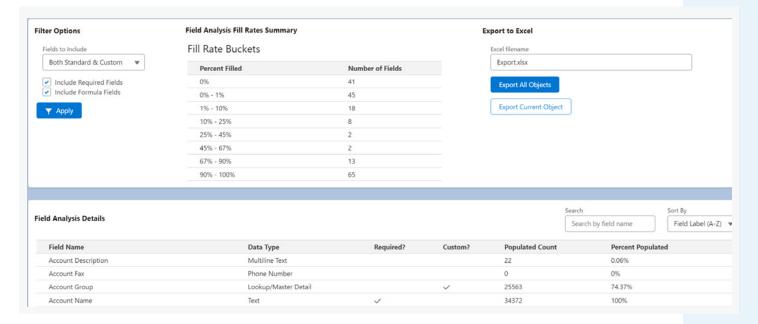


**APEX TEST EXECUTION** 

## **Features**

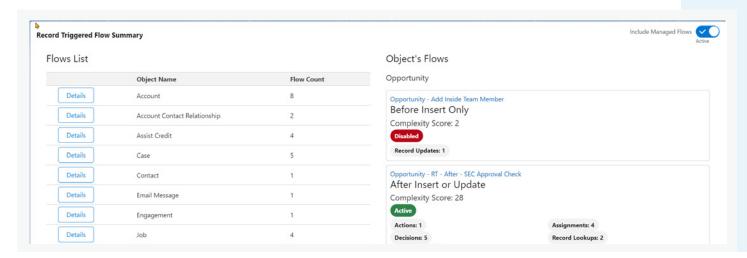
#### **Field Usage Reporter**

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.



## **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.

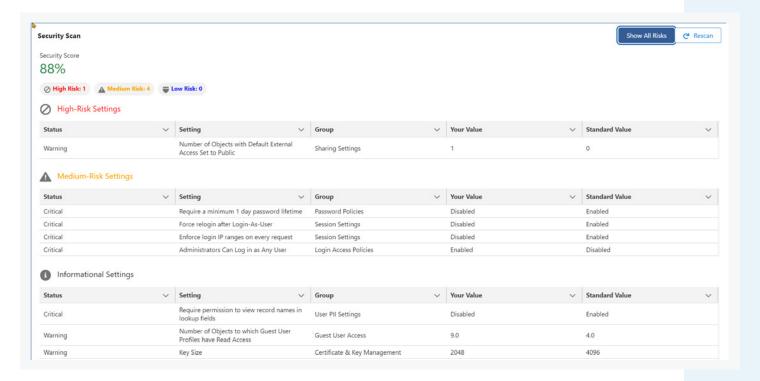




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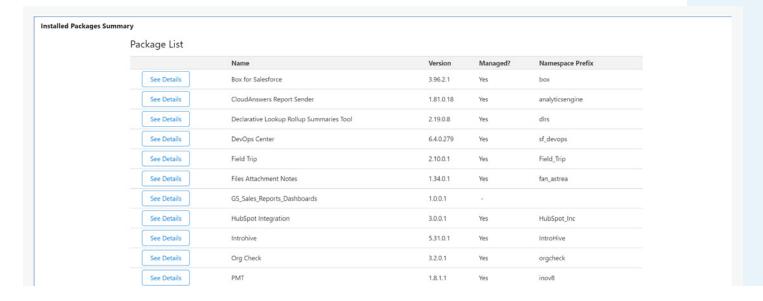
#### **Security Compliance Scan**

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.



#### **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.



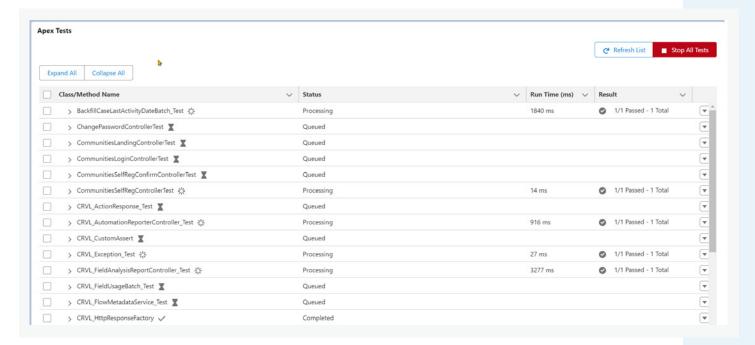


#### **Static Apex Code Analysis**

Clean code is easier to maintain and less error-prone. Our code analysis can highlight warnings of your code being too complex, diffcult 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.



#### **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.

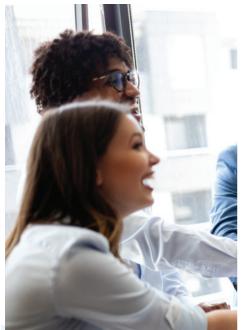






# **Honest to a Fault**

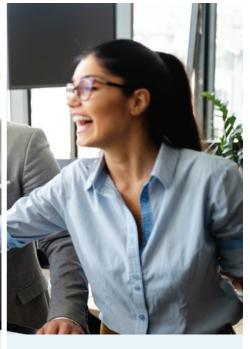
The consulting industry is plagued with firms willing to take advantage of a customer's inexperience around budget, deployment timeline, and software knowledge. At Caravel, we are upfront and honest about everything. The reality is that implementing enterprise business applications (if done right) takes 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.



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TEAM.

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# **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.

