

Check Limit

Proactively manage salesforce limits and licenses

Introduction

Get a detailed overview of your organization's standard limitations and its current usage with Check Limit, it provides administrators with a customized analytical experience featuring six distinct pie charts on the dashboard. Enabling you to hold the authority to choose the precise limits you want to monitor on the dashboard

Why is it important?

Navigating the complexities of Salesforce organization limits, licenses, and code coverage presents a significant challenge for administrators and developers. Check Limit addresses these intricacies and helps administrators, developers to manage more cost-effectively, improving efficiency, through the customizable features.

key Features

Advance Analytics	Offers advanced visualization to SFDC limits, licenses, and code coverage, to facilitate quick understanding and monitoring. Gives you the ability to handpick and monitor precise limits, aligning with organization's unique requirements.
Personalized Notifications	Proactive alerts for limit thresholds ensure timely actions to prevent usage issues, enhancing resource management efficiency.
Detailed License Information	Get insights to the license consumption and types facilitate informed decision-making and optimization of license usage.

Measure Code Coverage

Visibility into overall code aids developers and administrators in maintaining quality code standards.

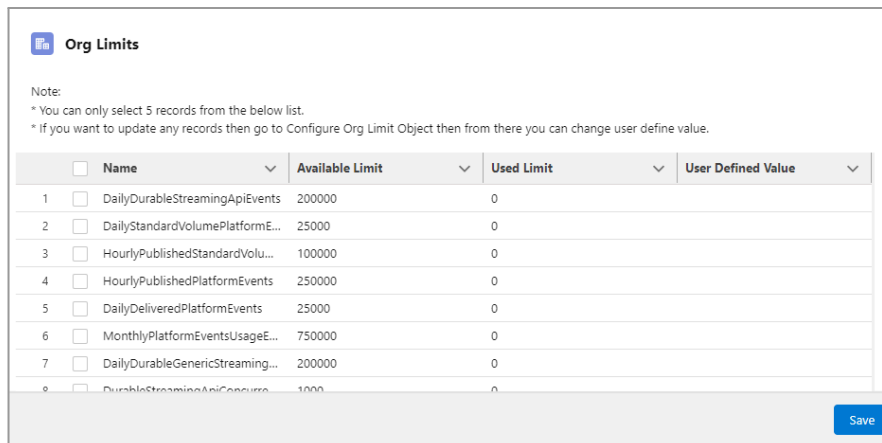
Get Started with Check Limit

To begin utilizing the Check Limit application, we'll start by setting up the necessary custom objects. Here are the four custom objects used:

- Configure Standard Org Limit
- Configure User License
- Configure Permission Set License
- Configure Feature License

1. Configure Org standard Limit

Navigate to the Configure Standard Org Limit tab and create a new entry and set your personalized limits with User Defined Value. These license constraints will be depicted on the [Salesforce Org Standard Limits](#) dashboard component.



☐	Name	Available Limit	Used Limit	User Defined Value
☐	DailyDurableStreamingApiEvents	200000	0	
☐	DailyStandardVolumePlatformE...	25000	0	
☐	HourlyPublishedStandardVolu...	100000	0	
☐	HourlyPublishedPlatformEvents	250000	0	
☐	DailyDeliveredPlatformEvents	25000	0	
☐	MonthlyPlatformEventsUsageE...	750000	0	
☐	DailyDurableGenericStreaming...	200000	0	
☐	DurableStreamingApiConsume...	1000	0	

2. Configure User License

Navigate to the Configure User License tab and create a new entry and set your personalized limits with User Defined Value. These license constraints will be depicted on the [Salesforce User Licenses Data](#) dashboard

component.

 **User Licenses**

Note:

- * You can only select 10 records from the below list.
- * If you want to update any records then go to Configure User License Object then from there you can change user define value.

	☐ Name	Total Licenses	Used Licenses	User Defined Value
1	☐ Cloud Integration User	1	0	
2	☐ Chatter External	500	0	
3	☐ Chatter Free	5000	1	
4	☐ Guest User License	25	0	
5	☐ Identity	100	0	
6	☐ Salesforce	2	2	
7	☐ Salesforce Limited Access - Free	100	4	

Save

3. Configure Permission Set License

Navigate to the Configure User License tab and create a new entry and set your personalized limits with User Defined Value. These license constraints will be depicted on the [Salesforce Permission Set License Data](#) dashboard component.

 **Permission Set Licenses**

Note:

- * You can only select 5 records from the below list.
- * If you want to update any records then go to Configure Permission set Licenses then from there you can change user define value.
- * Enter value in User defined Value column and press enter key or click anywhere.

	☐ Name	Total Licenses	Used Licenses	User Defined Value
1	☐ Service Cloud Voice User	2	0	
2	☐ Commerce Admin Permission Set Lic...	1020	0	
3	☐ Commerce Merchandiser User Permi...	1020	0	
4	☐ Lightning Order Management User	100000	0	
5	☐ Salesforce Scheduler	5	0	
6	☐ Facility Manager	10	0	
7	☐ Queue Manager	90	0	
8	☐ B2B Buyer Manager Permission Set ...	20	0	
9	☐ B2B Buyer Permission Set One Seat	20	0	
10	☐ Commerce User	1000020	0	
11	☐ Salesforce CPQ AA License	2	0	

4. Configure Feature License

Navigate to the Configure User License tab and create a new entry and set your personalized limits with User Defined Value. These license constraints will be depicted on the [Salesforce Feature Licenses Data](#) dashboard component.

 **Feature Licenses**

Note:

* You can only select 10 records from the below list.

* If you want to update any records then go to Configure Feature Licenses Object then from there you can change user define value.

☐	Name	Total Licenses	Used Licenses	User Defined Value
1 ☐	MarketingUser	2	1	
2 ☐	OfflineUser	2	0	
3 ☐	SupportUser	2	1	
4 ☐	SFContentUser	2	0	
5 ☐	InteractionUser	2	0	

Save

Analytics

Upon setting up the user-defined limits, access Salesforce dashboard components through the **Home** tab.

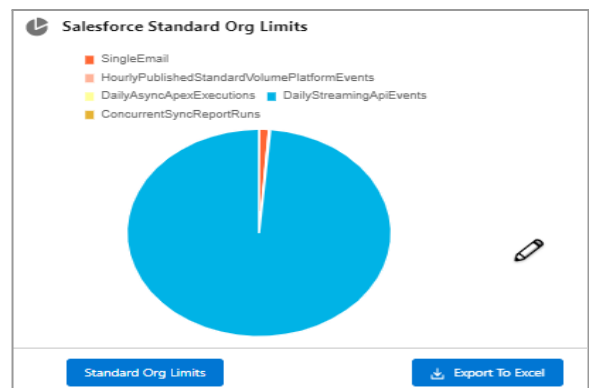
The home tab showcases an array of six distinct dashboard components.

1. Salesforce Org Standard Limits
2. Org Code Coverage
3. Salesforce User Licenses Data
4. Salesforce Permission Set License Data
5. Salesforce Feature Licenses Data
6. Salesforce Usage-based licenses Data

Salesforce Org Standard Limits

Get insights into utilization levels across diverse standard limits within your Salesforce org, the component provides two interactive features:

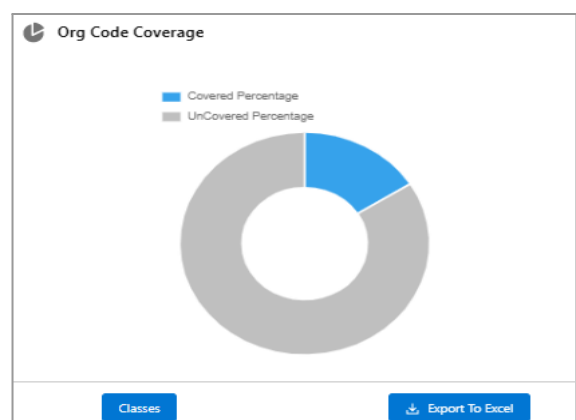
Org Standard Limit	Conveniently displays all standard limits within the organization
Export to Excel	Exports all organization standard limit data



Org Code Coverage

The component showcases all class names alongside their respective code coverage percentages, facilitating efficient tracking and management of code quality, the component provides two interactive features:

Classes	Displaying all class names and their corresponding code coverage percentages
Export to Excel	Exports all organization standard limit data



Note - To configure this component establish a Connected App, Authentication Provider, and Name Creds

Steps to establish a Connected App

1. In the setup Quick Find box, search for App.
2. Click on **App Manager**
3. Select **New Connected App**
4. Enter the name of the Connected App - **CodeCoverageCheckLimit**
5. Input your contact email.
6. Check the **Enable OAuth Settings** checkbox.
7. For the Callback URL, temporarily copy your URL and paste it until `force.com/` (e.g., `https://testing-dev-ed.lightning.force.com/`).
8. Choose all Available OAuth Scopes and Add them to the Selected OAuth Scopes.
9. Leave the remaining settings unchanged and the settings should resemble the screenshot provided below. Click on Save and Continue. The Connected App setup may take ~10 minutes.

The screenshot shows the 'New Connected App' configuration page in the Salesforce App Manager. The page is divided into two main sections: 'Basic Information' and 'API (Enable OAuth Settings)'. In the 'Basic Information' section, the 'Connected App Name' and 'API Name' are both set to 'CodeCoverageCheckLimit'. The 'Contact Email' field is empty. The 'Logo Image URL' and 'Icon URL' fields have links to upload or choose sample logos. The 'Info URL' and 'Description' fields are also empty. In the 'API (Enable OAuth Settings)' section, the 'Enable OAuth Settings' checkbox is checked. The 'Enable for Device Flow' checkbox is unchecked. The 'Callback URL' is set to 'https://testing-dev-ed.lightning.force.com/'. The 'Use digital signatures' checkbox is unchecked. The 'Selected OAuth Scopes' section shows a list of available scopes on the left and a list of selected scopes on the right. The selected scopes include 'Access Analytics REST API Charts Geodata resources (eclair_api)', 'Access Analytics REST API resources (wave_api)', 'Access Connect REST API resources (chatter_api)', 'Access Lightning applications (lightning)', 'Access Visualforce applications (visualforce)', 'Access chatbot services (chatbot_api)', 'Access content resources (content)', 'Access custom permissions (custom_permissions)', 'Access the identity URL service (id, profile, email, address, phone)', and 'Access unique user identifiers (openid)'. At the bottom, there are checkboxes for 'Require Secret for Web Server Flow' (checked), 'Require Secret for Refresh Token Flow' (checked), 'Enable Client Credentials Flow' (unchecked), and 'Introspect All Tokens' (unchecked).

Steps to create Authentication Provider

1. In the Setup Quick Find Box, search for Auth.
2. Click on **Auth. Providers** and Select **New** and Choose Provider Type as Salesforce
3. Enter the Name as **RecentItems** (Do not alter this Name; otherwise, your Code Coverage Component will not function properly).
4. For the Consumer Key, open the Connected App created in the above step.
 - a. In the left side Quick Search Box, search for **App Manager** and right-click on it, and open it in a new tab.
 - b. Click the Drop-Down button on the right of the Connected App you created (**CodeCoverageCheckLimit**), then click View.
 - c. Click on "Manage Consumer Details" for the Consumer Key and Secret.
 - d. A verification code will be sent to your email address; enter the OTP and click Verify.
 - e. Copy the Consumer Key and Consumer Secret, and paste them in the Auth Provider's Consumer Key and Consumer Secret fields.
5. Save your changes, upon saving, locate the Callback URL at the bottom of the detail page. Copy this URL, as it will be needed to update the Connected App created in the initial step.
6. Return to the App Manager by searching for an **App** in the Quick Find Box. Proceed to edit the Connected App **CodeCoverageCheckLimit** by selecting it from the dropdown menu.
7. Within the Callback URL section, replace the existing URL with the copied Callback URL obtained from the Authentication Providers **RecentItems**.
8. Save your modifications, then select **Save and Continue** for the Connected App **CodeCoverageCheckLimit** and allow approximately 10 minutes for the changes to take effect.

Steps to create Named Credentials

1. In the setup Quick Find Box, search for **Named Credentials** and click on it. Click on the dropdown beside New and select New Legacy.
2. Enter the details: Label: **CodeCoverageData**; Name: **CodeCoverageData**
Note: Do not alter this Name and label, as it may affect the functionality of your Code Coverage Component.
3. For the URL, search for My Domain in the Quick Find Box and right-click on it to open it in a new tab. Copy the Current My Domain URL (e.g., test.sandbox.my.salesforce.com) – it may differ from one organization to

another. Paste this URL in the Named Credentials URL field and prefix it with "https://" (e.g., https://test.sandbox.my.salesforce.com).

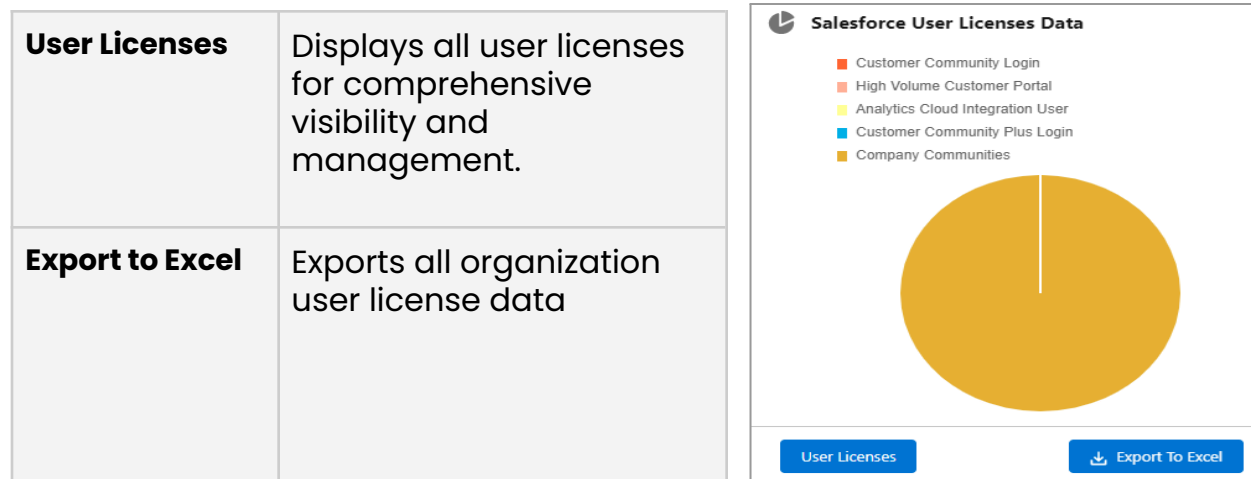
4. Select Identity Type as Named Principle.
5. Choose Authentication Protocol as OAuth 2.0.
6. Set Authentication Provider as RecentItems.
7. Scope type: refresh_token full.
8. Leave the remaining settings unchanged.
9. Click on Save. You will be redirected to the authentication page. Grant the necessary access and authenticate by logging into your org.
10. After successful authentication, you are now able to utilize the Code Coverage Component.

Troubleshooting Steps for ResizeObserver Error

1. Navigate to setup and type "session settings" in the quick find box. Click on session settings.
2. Search for [Use Lightning Web Security for Lightning web components \(GA\) and Aura components \(Beta\)](#) and enable this setting. This setting is enabled by default in new orgs, but may need to be manually enabled in orgs created before SU-23.
3. After enabling the setting, perform a hard refresh by pressing ctrl+shift+R. If the issue persists, please contact us via the provided email address.
4. **Note:** If you encounter any further issues during setup or usage of this app, please don't hesitate to reach out to us via the provided email address.

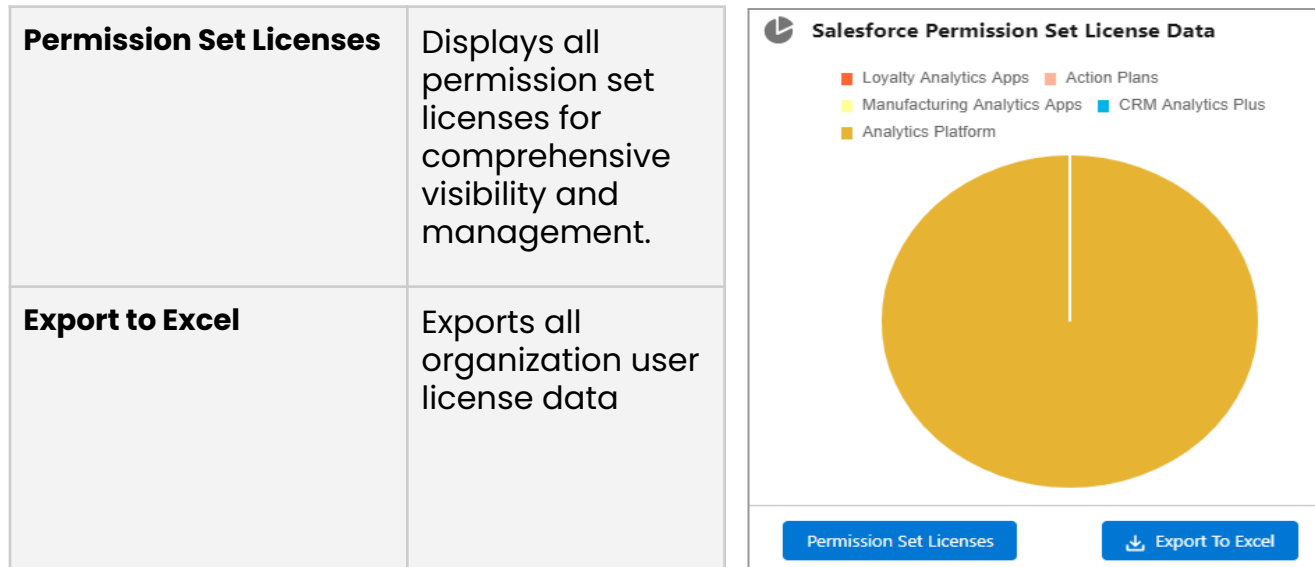
Salesforce User Licenses Data

Understand the utilization and distribution of user licenses within the Salesforce environment. It enables administrators to monitor user license usage and ensure efficient allocation across the organization.



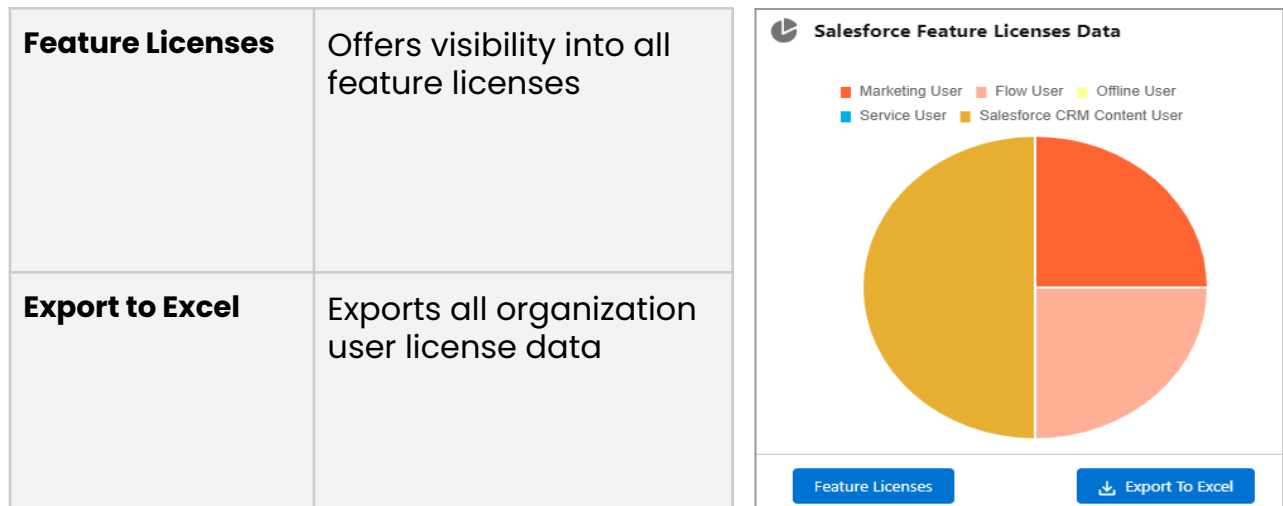
Salesforce Permission Set License Data

Understand the utilization and distribution of permission set licenses within the Salesforce environment.



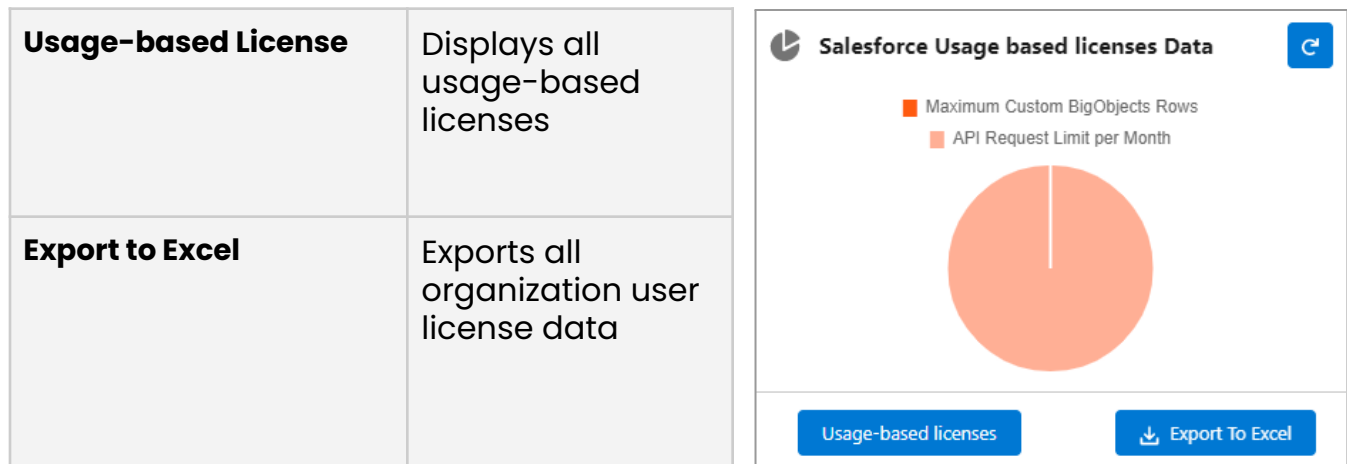
Salesforce Feature Licenses Data

Understand the utilization and distribution of permission set licenses within the Salesforce environment.



Salesforce Usage-based licenses Data

Dashboard highlights three values with high usage, providing insights into the utilization of usage-based licenses.



Email Cadences

To schedule email alerts using Schedule Apex, follow these steps:

1. Go to Setup and in the Quick Find box, search for **Apex Classes** and click on it.
2. In Apex Classes, click on the Schedule Apex button.
3. Enter the Job Name as **CheckLimitEmailAlerts**
4. In Apex Class, select the ScheduleEmailAlertForCheckLimit class.
5. Customize the email alert frequency according to your preference. For example, for daily alerts, select Frequency as 'Weekly' and choose all the days.
6. Specify the Start and End Date for the scheduled alerts.
7. For Preferred Start Time, select 10:00 PM.
8. Click on Save to schedule the email alerts.

Schema Diagram

In the above diagram, the user entity exhibits the following relationships:

- One-to-many relationship with Configure Standard Org Limit.
- One-to-many relationship with Configure Permission set license.
- One-to-many relationship with Configure User License.
- One-to-many relationship with Configure Feature License.

