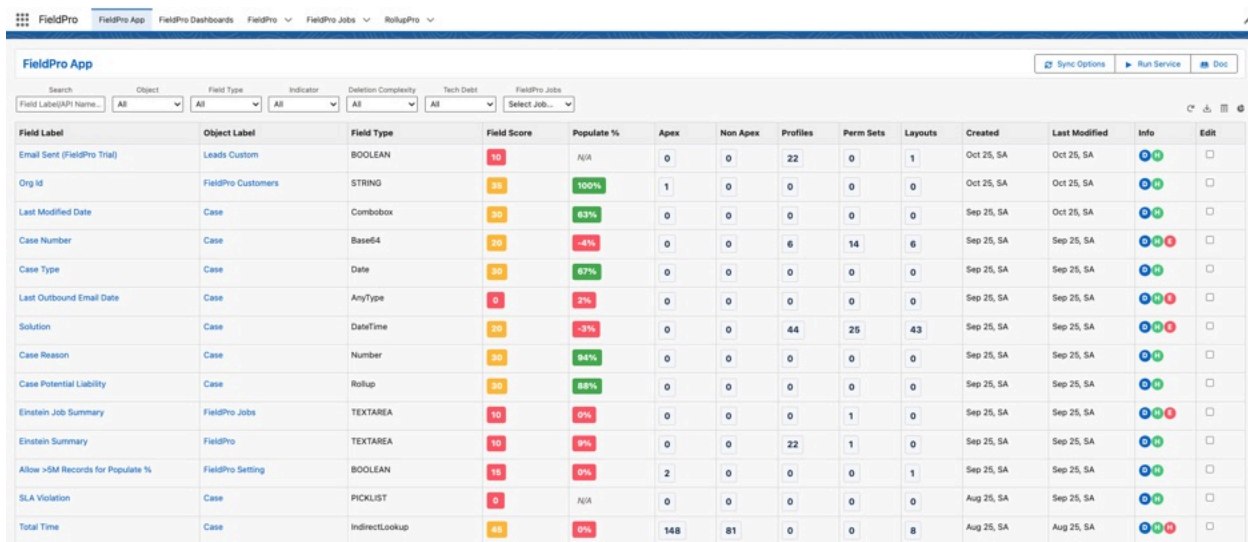


FieldPro Introduction

FieldPro: Salesforce Field Dictionary and Field Health

FieldPro is a lightweight **Salesforce AppExchange** application that helps Salesforce teams reduce technical debt, improve performance, and maintain long-term org health by giving clear visibility into **custom field usage and impact**.

As Salesforce orgs mature, custom fields accumulate across objects. Over time, this slows page loads and reports, clutters user interfaces, increases admin effort, and raises the risk of hitting Salesforce limits. FieldPro helps you **identify unused and underused fields, understand dependencies, and take safe cleanup actions**—without disrupting business operations.



The screenshot displays the FieldPro App interface. At the top, there's a navigation bar with 'FieldPro' and several tabs: 'FieldPro App', 'FieldPro Dashboards', 'FieldPro', 'FieldPro Jobs', and 'RollupPro'. Below the navigation bar, there's a search bar and several filters: 'Object' (All), 'Field Type' (All), 'Indicator' (All), 'Deletion Complexity' (All), 'Tech Debt' (All), and 'FieldPro Jobs' (Select Job...). The main table lists various custom fields with columns for Field Label, Object Label, Field Type, Field Score, Populate %, Apex, Non Apex, Profiles, Perm Sets, Layouts, Created, Last Modified, Info, and Edit. The table includes fields like 'Email Sent (FieldPro Trial)', 'Org Id', 'Last Modified Date', 'Case Number', 'Case Type', 'Last Outbound Email Date', 'Solution', 'Case Reason', 'Case Potential Liability', 'Einstein Job Summary', 'Einstein Summary', 'Allow >5M Records for Populate %', 'SLA Violation', and 'Total Time'. Each row shows the field's health score (e.g., 10, 30, 40) and its impact on system performance (e.g., 100%, 83%, 41%, 67%, 2%, -3%, 84%, 68%, 0%, 9%, 0%, 0%).

Field Label	Object Label	Field Type	Field Score	Populate %	Apex	Non Apex	Profiles	Perm Sets	Layouts	Created	Last Modified	Info	Edit
Email Sent (FieldPro Trial)	Leads Custom	BOOLEAN	10	N/A	0	0	22	0	1	Oct 25, SA	Oct 25, SA	Info	Edit
Org Id	FieldPro Customers	STRING	30	100%	1	0	0	0	0	Oct 25, SA	Oct 25, SA	Info	Edit
Last Modified Date	Case	Combobox	30	83%	0	0	0	0	0	Sep 25, SA	Oct 25, SA	Info	Edit
Case Number	Case	Base64	30	41%	0	0	6	14	6	Sep 25, SA	Sep 25, SA	Info	Edit
Case Type	Case	Date	30	67%	0	0	0	0	0	Sep 25, SA	Sep 25, SA	Info	Edit
Last Outbound Email Date	Case	AnyType	0	2%	0	0	0	0	0	Sep 25, SA	Sep 25, SA	Info	Edit
Solution	Case	DateTime	30	-3%	0	0	44	25	43	Sep 25, SA	Sep 25, SA	Info	Edit
Case Reason	Case	Number	30	84%	0	0	0	0	0	Sep 25, SA	Sep 25, SA	Info	Edit
Case Potential Liability	Case	Rollup	30	68%	0	0	0	0	0	Sep 25, SA	Sep 25, SA	Info	Edit
Einstein Job Summary	FieldPro Jobs	TEXTAREA	10	0%	0	0	0	1	0	Sep 25, SA	Sep 25, SA	Info	Edit
Einstein Summary	FieldPro	TEXTAREA	10	9%	0	0	22	1	0	Sep 25, SA	Sep 25, SA	Info	Edit
Allow >5M Records for Populate %	FieldPro Setting	BOOLEAN	10	0%	2	0	0	0	1	Sep 25, SA	Sep 25, SA	Info	Edit
SLA Violation	Case	PICKLIST	0	N/A	0	0	0	0	0	Aug 25, SA	Sep 25, SA	Info	Edit
Total Time	Case	IndirectLookup	40	0%	148	81	0	0	8	Aug 25, SA	Aug 25, SA	Info	Edit

Product Snapshot

- **Product:** FieldPro – Salesforce AppExchange Application
- **Listing ID:** a0N3A00000EcsCZUAZ
- **Current Version:** FieldPro 1.105 (1.105.0)
- **Last Updated:** January 2026
- **Prepared by:** Sid Agarwal

Business Value

FieldPro delivers measurable outcomes by helping organizations:

- Improve Salesforce page load, query, and report performance
- Reduce manual audits and administrative overhead

- Lower the risk of hitting Salesforce governor limits
 - Enable safer cleanups before releases, migrations, or audits
 - Maintain a clean, scalable Salesforce architecture
-

What FieldPro Provides

FieldPro is an admin-controlled toolkit focused on **metadata, not business data**:

- **Complete field inventory:** Build a full dictionary of standard and custom fields
- **Field health analysis:** Identify unused, underused, and high-impact fields
- **Dependency visibility:** Surface metadata references before deprecation
- **Bulk actions:** Clone fields, edit properties, and clean up field permissions
- **Scheduled scans:** Track field health and population trends over time
- **Exportable reports:** CSV outputs for documentation and decision-making

Important: FieldPro never deletes fields automatically. All actions are explicit and controlled by administrators.

Who It's For

- Salesforce Administrators and Architects
 - Platform and Center of Excellence (CoE) teams
 - Enterprise Salesforce org owners
 - Teams managing large, complex, or long-running Salesforce environments
-

Security & Trust

FieldPro is built entirely on the Salesforce platform and:

- Operates on **metadata only** (no business data or PII)
 - Respects object-level and field-level security
 - Runs in the authenticated user's context
 - Meets Salesforce AppExchange Security Review standards
 - Aligns with GDPR, CCPA, and SOC 2 principles
-

Deployment & Adoption

- Installed directly from Salesforce AppExchange

- No coding or external integrations required
 - Permission-based access via the **FieldProApp** permission set
 - Safe for Production and Sandbox environments
-

Availability

FieldPro is available on Salesforce AppExchange:

<https://appexchange.salesforce.com/appxListingDetail?listingId=a0N3A00000EcsCZUAZ>

FieldPro helps Salesforce teams clean up with confidence—faster performance, lower risk, and a healthier org, all from a simple, focused app.

Installation Guide

FieldPro – Installation Guide

This guide explains how to install the **FieldPro** application from Salesforce AppExchange and grant access to users.

Step 1: Download FieldPro from Salesforce AppExchange

1. Open the FieldPro listing on **Salesforce AppExchange** using the link below:



<https://appexchange.salesforce.com/appxListingDetail?listingId=a0N3A00000EcsCZUAZ>

2. Click **Get It Now**
 3. Log in using your Salesforce credentials
 4. Select the org where you want to install FieldPro (Production or Sandbox)
-

Step 2: Install the Application

During installation, Salesforce will prompt you to choose user access.

You can either:

- **Install for All Users**
Recommended if all admins should have access

OR

- **Install for Specific Profiles**
You can grant access later using permission sets (recommended for controlled rollout)

Complete the installation and wait for Salesforce to confirm success.

Step 3: Grant User Access (Required)

After installation, users must be assigned the **FieldProApp** permission set to access the application.

Assign Permission Set

1. Go to **Setup**
2. Search for **Permission Sets**
3. Open **FieldProApp**
4. Click **Manage Assignments**
5. Click **Add Assignments**
6. Select the users who need access
7. Click **Assign**

✓ Users with this permission set will be able to use FieldPro.

Step 4: Verify Installation

To confirm successful installation:

1. Log in as a user with the **FieldProApp** permission set
2. Open the **App Launcher**
3. Search for **FieldPro**
4. Open the **FieldPro App**

You should now see the FieldPro interface and be able to run scans.

Recommended Users

FieldPro is typically assigned to:

- Salesforce Administrators
 - Salesforce Developers
 - Salesforce Architects
 - Business Analysts
 - Platform / CoE team members
-

Notes & Best Practices

- No additional configuration is required after installation
 - FieldPro respects existing Salesforce permissions
 - No coding or metadata changes are made automatically
 - Safe to install in **Production and Sandboxes**
-

Field Dictionary

FieldPro Data Dictionary

FieldPro builds a **centralized Data Dictionary** by fetching Salesforce field metadata and storing it in the `FieldPro__c` custom object.

This dictionary becomes the foundation for **field health analysis, technical debt identification, metadata lookup, and safe field deprecation**.

What Is the FieldPro Data Dictionary?

The FieldPro Data Dictionary is a complete inventory of Salesforce fields that includes:

- Standard and custom fields
- Field attributes (type, length, labels, etc.)
- Field ownership and audit attributes
- Metadata relationships (Flows, Apex, Layouts, Reports, etc.)
- Technical debt indicators (unused, unreferenced, or unsecured fields)

This data is used across FieldPro dashboards, reports, and dashboards.

Field Metadata Sync Options

	Metadata Retrieved	API used	Estimated Duration
Basic	Field Details: Object Label/API, Field Label/API, Custom?, Formula?, Type, External ID?, Unique?, Help Text, Namespace Prefix	SOAP	5 mins
Advanced	Field Details: Salesforce Id, Created/Modified By & Date, Manageable State, Default/Formula Value, Label, Description, Length, Precision, Reference/Relationship (To, Label, Name), Required?, Summarized Field, Summary Key/Operation, Track History, Type, Compliance Category, Data Owner/Sensitivity, Usage, Picklist Values Metadata References: Apex Class/Trigger, VF Page/Component, Formula Fields, Page Layouts, Profiles, Permission Sets, Validation/Workflow Rules, Field Updates, Flows, Report Types.	Tooling References	30 mins

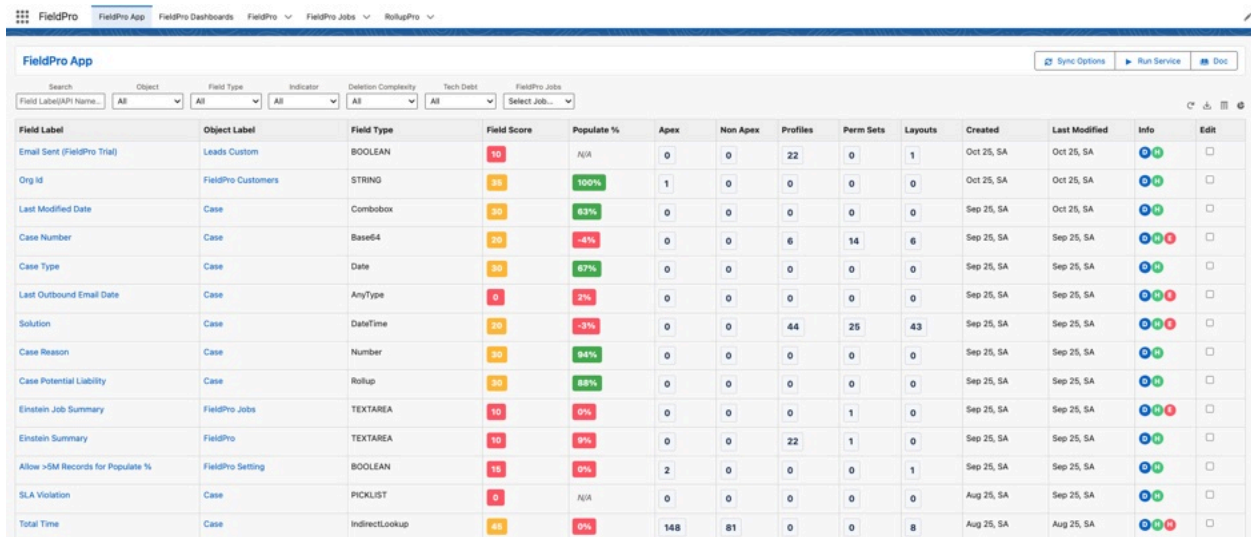
Standard Fields	Fetch all Standard fields for an object — FieldPro skips some by default to prevent overflow, so use this to pull them on demand.	SOAP	2 mins
Report References	Fetches Report references for all fields. Beta: Runs on reports used in the last 30 days. Contact FieldPro Support to enable full scan.	Analytics	30 mins
Field Trip	Fetches complete field details (in Advanced) along with population percentages for the selected object, helping you complete your data dictionary and identify unused fields.	Tooling References SOAP	1-2 hours

How to Run: “FieldPro” App -> “Sync Options” and “Run Service”

How to Track: “Under Setup → Apex Jobs” or “FieldPro Jobs” tab

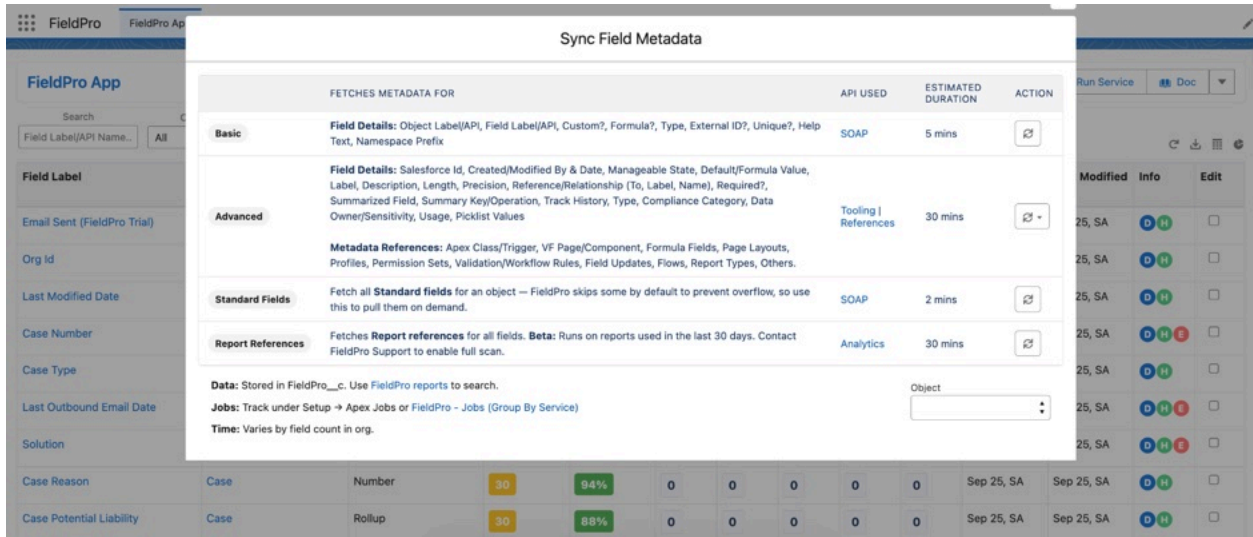
Time: Varies by field count in org.

FieldPro App

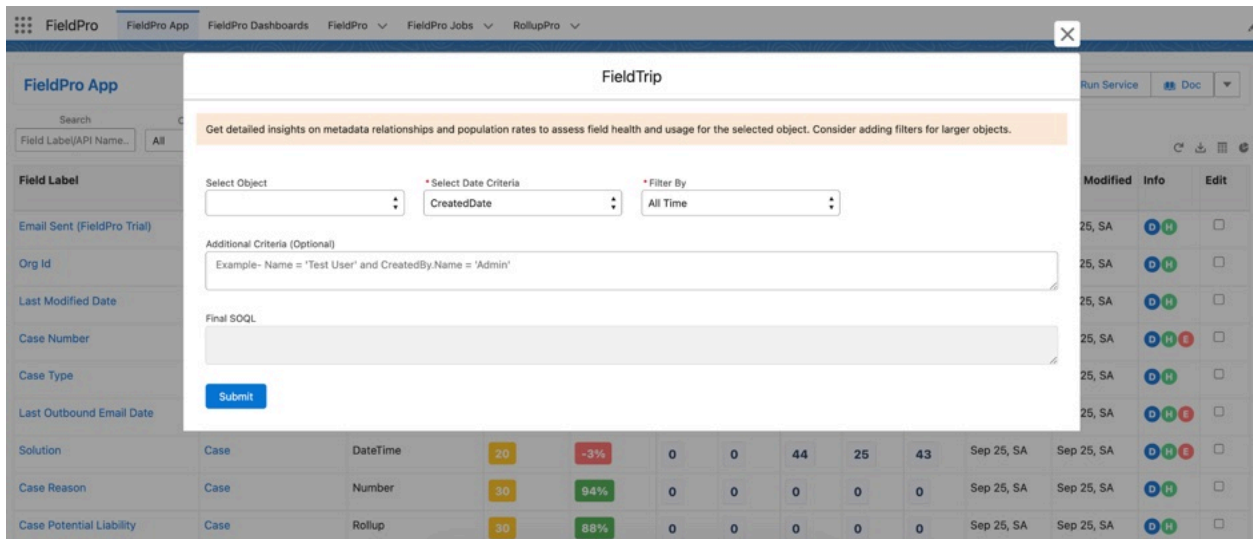


Field Label	Object Label	Field Type	Field Score	Populate %	Apex	Non Apex	Profiles	Perm Sets	Layouts	Created	Last Modified	Info	Edit
Email Sent (FieldPro Total)	Leads Custom	BOOLEAN	10	N/A	0	0	22	0	1	Oct 25, SA	Oct 25, SA	Info Edit	☐
Org Id	FieldPro Customers	STRING	35	100%	1	0	0	0	0	Oct 25, SA	Oct 25, SA	Info Edit	☐
Last Modified Date	Case	Combobox	35	63%	0	0	0	0	0	Sep 25, SA	Oct 25, SA	Info Edit	☐
Case Number	Case	Base64	39	-4%	0	0	6	14	6	Sep 25, SA	Sep 25, SA	Info Edit	☐
Case Type	Case	Date	39	87%	0	0	0	0	0	Sep 25, SA	Sep 25, SA	Info Edit	☐
Last Outbound Email Date	Case	AnyType	6	2%	0	0	0	0	0	Sep 25, SA	Sep 25, SA	Info Edit	☐
Solution	Case	DateTime	35	-3%	0	0	44	25	43	Sep 25, SA	Sep 25, SA	Info Edit	☐
Case Reason	Case	Number	35	94%	0	0	0	0	0	Sep 25, SA	Sep 25, SA	Info Edit	☐
Case Potential Liability	Case	Rollup	39	88%	0	0	0	0	0	Sep 25, SA	Sep 25, SA	Info Edit	☐
Einstein Job Summary	FieldPro Jobs	TEXTAREA	10	0%	0	0	0	1	0	Sep 25, SA	Sep 25, SA	Info Edit	☐
Einstein Summary	FieldPro	TEXTAREA	10	9%	0	0	22	1	0	Sep 25, SA	Sep 25, SA	Info Edit	☐
Allow >5M Records for Populate %	FieldPro Setting	BOOLEAN	18	0%	2	0	0	0	1	Sep 25, SA	Sep 25, SA	Info Edit	☐
SLA Violation	Case	PICKLIST	6	N/A	0	0	0	0	0	Aug 25, SA	Sep 25, SA	Info Edit	☐
Total Time	Case	IndirectLookup	45	0%	148	81	0	0	8	Aug 25, SA	Aug 25, SA	Info Edit	☐

Sync Options



Run Service “FieldTrip”



FieldPro “Sample Record Page”

Detailed view of the custom field record. It shows

- Complete field details
- Friendly view of all metadata references and
- Einstein's next best action recommendations
- SOAP and Tooling response (devs would love this)

FieldPro

FieldPro AppFieldPro DashboardsFieldProFieldPro JobsRollupPro

FieldPro

Field Type

EditPrintable View

Field Type

Object Label

Namespace Prefix

Field Score

STRING

FieldPro

fpro

55

Summary

Details

Field Type

Details

fpro__Field_Type__c • fpro • STRING • Link

Object Details

FieldPro • fpro__FieldPro__c • FieldPro

Audit

Created SFDC Admin • Wednesday, Nov 28, 17

Modified SFDC Admin • Wednesday, Jan 03, 18

Field Score (55)

Populate Percentage

99.99% • 11716 / 11716 • Wednesday, Nov 12, 25

Field References

7 Apex • 2 Non-Apex • Friday, Jan 02, 26

Metadata References

Apex Class (7)

FieldProAccess

FieldProAccess

FieldProUsageService

FieldPro

FieldProFieldActions

FieldProController

Profile (25)

Guest License User

Anypoint Integration

Custom Support Profile

External Apps Login User

Salesforce API Only System

Integrations

Fields (2)

Field_Type

Field_Type

Page Layout (1)

FieldPro

Permission Sets (1)

FieldProApp

Field Metadata

Soap Api

Tooling Api

Info

```
{
  "aggregatable": true,
  "apiPredictionField": false,
  "autoNumber": false,
  "byteLength": 765,
  "calculated": false,
  "calculatedFormula": null,
  "cascadeDelete": false,
  "caseSensitive": false,
  "compoundFieldName": null,
  "controllerName": null,
  "createable": true,
  "custom": true,
  "defaultValue": null,
  "defaultValueFormula": null,
  "defaultedOnCreate": false,
  "dependentPicklist": false,
  "deprecatedAndHidden": false,
  "digits": 0,
  "displayLocationInDecimal": false,
  "encrypted": false,

```

FieldPro

FieldPro AppFieldPro DashboardsFieldProFieldPro JobsRollupPro

FieldPro

Field Score

EditPrintable View

Field Type

Object Label

Namespace Prefix

Field Score

DOUBLE

FieldPro

fpro

55

Summary

Details

Field Score

Details

fpro__Field_Score__c • fpro • DOUBLE • Link

Object Details

FieldPro • fpro__FieldPro__c • FieldPro

Audit

Created SFDC Admin • Monday, Dec 18, 17

Modified SFDC Admin • Thursday, Sep 04, 25

Field Score (55)

Populate Percentage

100% • 11716 / 11716 • Wednesday, Nov 12, 25

Field References

2 Apex • 1 Non-Apex • Monday, Jan 05, 26

Metadata References

Apex Class (2)

FieldPro

FieldProController

Profile (25)

Guest License User

Anypoint Integration

Force.com - App

Subscription User

External Apps Login

User

Fields (1)

Field_Score_Color

Page Layout (1)

FieldPro

Permission Sets (1)

FieldProApp

Field Metadata

Soap Api

Tooling Api

Formula Value

Info

```
{
  "aggregatable": true,
  "apiPredictionField": false,
  "autoNumber": false,
  "byteLength": 0,
  "calculated": true,
  "calculatedFormula": "IF(ISNULL(fpro__Last_Refresh_Date_MCD_
  ",
  "cascadeDelete": false,
  "caseSensitive": false,
  "compoundFieldName": null,
  "controllerName": null,
  "createable": false,
  "custom": true,
  "defaultValue": null,
  "defaultValueFormula": null,
  "defaultedOnCreate": null,
  "dependentPicklist": false,
  "deprecatedAndHidden": false,
  "digits": 0,
  "displayLocationInDecimal": false,
  "encrypted": false,

```

Summary

Details

Field Information

Label

Field Type

API Name

fpro__Field_Type__c

Namespace Prefix

fpro

Salesforce Record Link

Link

Salesforce Id

00N100000G0GFZUA3

Field Score

55

Deletion Complexity

Object Information

Object Label

FieldPro

Object API Name

fpro__FieldPro__c

Object (Report)

FieldPro

Timeline

Created By

SFDC Admin

Created Date

11/28/2017, 10:09 PM

Last Modified By

SFDC Admin

Last Modified Date

1/2/2018, 10:55 PM

Standard Salesforce Data (Read Only)

Is Custom Field?

☒

Is External id?

☐

Is Unique?

☐

Is Required?

☐

Is Formula Field?

☐

Field Type

STRING

Field Type (Tooling)

Text

Object Type

Custom Object

Field Type (Status)

Managed Field

Description

Indicates the field type for the field in SF. Returns one of the DisplayType enum values, depending on the type of field. Fetched using DescribeFieldResult.

FieldPro

Field Type

EditPrintable View

Is Formula Field?

☐

FieldPro is User-Entered?

☐

Track History?

☐

Default Value

Summarized Field

Summary Foreign Key

Summary Operation

Unique Id

fpro__FieldPro__c.fpro__Field_Type__c

Manageable State

released

Description

Indicates the field type for the field in SF. Returns one of the DisplayType enum values, depending on the type of field. Fetched using DescribeFieldResult.

Inline Help Text

Indicates the field type for the field in SF. Returns one of the DisplayType enum values, depending on the type of field. Fetched using DescribeFieldResult.

Length

255

Precision

Relationship Name

Relationship Label

Reference To

Picklist Values

Formula Value

Data Classification

Data Owner

Field Usage

Data Sensitivity Level

Compliance Categorization

Recorded Errors

Error Field Data

Custom Admin Notes

Custom Admin Notes

Population Summary

Populate Percentage

99.99%

Populated On

11,715

Total Count

11,716

Run Service (Usage)?

☒

Last Refresh Date (Usage)

11/12/2025, 9:14 AM

Sample Records/Values

Link: DATETIME

Link: ID

FieldTrip SQL

SELECT [ALL FIELDS] FROM fpro_FieldPro_c

Last Populated Record

Last Populated Record ID

a00hp000010zcQmIAJ

Last Populated Date

10/22/2025, 7:14 PM

References Counts

References (Apex Class) Count	7	Run Service (MCD)?	
References (Apex Trigger) Count	0	Last Refresh Date (MCD)	1/4/2026, 8:52 PM
References (Page Layouts) Count	1	References (Visual-Force Page) Count	0
References (Workflow Rules) Count	0	References (Visual-Force Component) Count	0
References (Validation Rules) Count	0	References (Profile Visibility) Count	29
References (Flow) Count	0	References (Workflow Field Update) Count	0
References (Formula Fields) Count	2	References (Permission Sets) Count	1
References (Others) Count	0	References (Reports) Count	0
References Total Count	39	References (Report-Type) Count	0
References Total Count (Apex)	7	References Total Count (Automations)	2

Apex (Referencing this field)

References (Apex Class)	FieldProRecs FieldProTests FieldProUsageService FieldPro FieldProFieldActions FieldProController	References (Visual-Force Page)	
-------------------------	---	--------------------------------	--

Other Metadata References

References (Page Layouts)	FieldPro	References (Profile Visibility)	Guest License User Anypoint Integration External Apps Login User Salesforce API Only System Integrations Custom: Marketing Profile Analytics Cloud Integration User Analytics Cloud Security User Contract Manager Cross Org Data Proxy User Custom: Sales Profile Custom: Support Profile Force.com - App Subscription User Force.com - Free User Gold Partner User Identity User Marketing User Partner App Subscription User Partner Community Login User Partner Community User Read Only Silver Partner User Solution Manager Standard Platform User Standard User System Administrator Work.com Only User B2B Reordering Portal Buyer Profile FieldProAnalytics Profile Standard Guest
References (Workflow Rules)		References (Permission Sets Visibility)	FieldProApp
References (Validation Rules)		References (Workflow Field Updates)	
References Flow		References (Formula)	Field_Type

Field Health

Field Health – Identify, Prioritize, and Safely Deprecate Fields

Field Health in FieldPro helps you understand which custom fields matter, which don't, and how risky it is to clean them up. It combines **usage data**, **metadata dependencies**, and **technical debt indicators** so admins can take confident, low-risk actions.

FieldTrip: The Core of Field Health

FieldTrip is FieldPro's advanced scan that analyzes a selected object in depth.

It fetches:

- Complete field metadata
- Metadata relationships (flows, Apex, formulas, layouts, etc.)
- Field population percentages over a chosen time window

Why it matters:

FieldTrip gives you a clear picture of **actual field usage**, not just field existence—making it the foundation for accurate field health scoring and cleanup decisions.

FieldTrip

Calculate metadata references and populate percentage on all fields for an object.

Select Object: Case (874)

Select Date Criteria: CreatedDate

Filter By: LAST_N_YEARS

*X: 3

Additional Criteria (Optional): Status = 'Closed'

Final SOQL: SELECT [ALL FIELDS] FROM Case WHERE CreatedDate >= LAST_N_YEARS:3 AND Status = 'Closed'

Submit Close

Field Health Score

Each field is evaluated using multiple signals to produce a **Field Health Score**, helping you quickly prioritize action.

Typical inputs include:

- Population percentage (how often the field is used)
- Metadata references (Apex, automation, reports, layouts)
- Missing best practices (description, help text, compliance info)
- Permission footprint (profiles and permission sets)

Result:

Admins can instantly spot:

- Safe cleanup candidates
- Fields that need review
- High-risk fields that should not be touched

FieldPro

FieldPro App

FieldPro Dashboards

FieldPro

FieldPro Jobs

RollupPro

FieldPro Jobs

FieldPro Jobs-01456

Job

Job Details

fieldpro@force.com
7/14/2025, 9:14 AM
SELECT [ALL FIELDS] FROM Case
Completed

Object Details

Case(Case)
762 Total Fields
708 Custom Fields
255 Tech Debt *
-786 number of records

Technical Debt Review

Best Practices

708 Missing Data Classifications
23 No Layouts
108 No Permissions

Performance Impact

113 0% Populated
196 Less Than 1% Populated
255 Less Than 5% Populated
255 Less Than 10% Populated

Fields Populated Less Than 5%

Deletion Complexity

120 Easy (No Metadata Refs)
63 Medium (Non Apex Refs like flows, layouts)
72 Hard (Apex Refs like apex, triggers)

Performance Gain

21 Relationship Fields
39 Long/Rich Text Fields

Related

Details

FieldPro Jobs Name

FieldPro Jobs-01456

Object (Report)

Case

Service Name

FieldProUsageService

Object Name

Case

FieldTrip SOQL

SELECT [ALL FIELDS] FROM Case

Status Bar

Apex Job Details (Auto Fill - Do Not Modify)

Apex Job Status

Completed

Apex Job Submitted_By

fieldpro@force.com

Apex Job Id

707Hp0000KdSZ4flQG

Apex Job SubmittedDate

7/14/2025, 9:14 AM

Apex Job Id (Parent)

707Hp0000KdSYs1lQG

Apex Job CompletedDate

7/14/2025, 9:14 AM

Apex Job JobItemsProcessed

1

Apex Job ExtendedStatus

Apex Job TotalJobItems

1

Time to complete (minutes)

0

Apex Job NumberOfErrors

0

(Deleted) Apex Job details

Deletion Complexity

FieldPro classifies fields by **deletion complexity**, so there are no surprises during cleanup:

- **Easy** – No metadata references, low usage

- **Medium** – Referenced by declarative tools (flows, reports, email templates)
- **Hard** – Referenced by Apex, triggers, or critical integrations

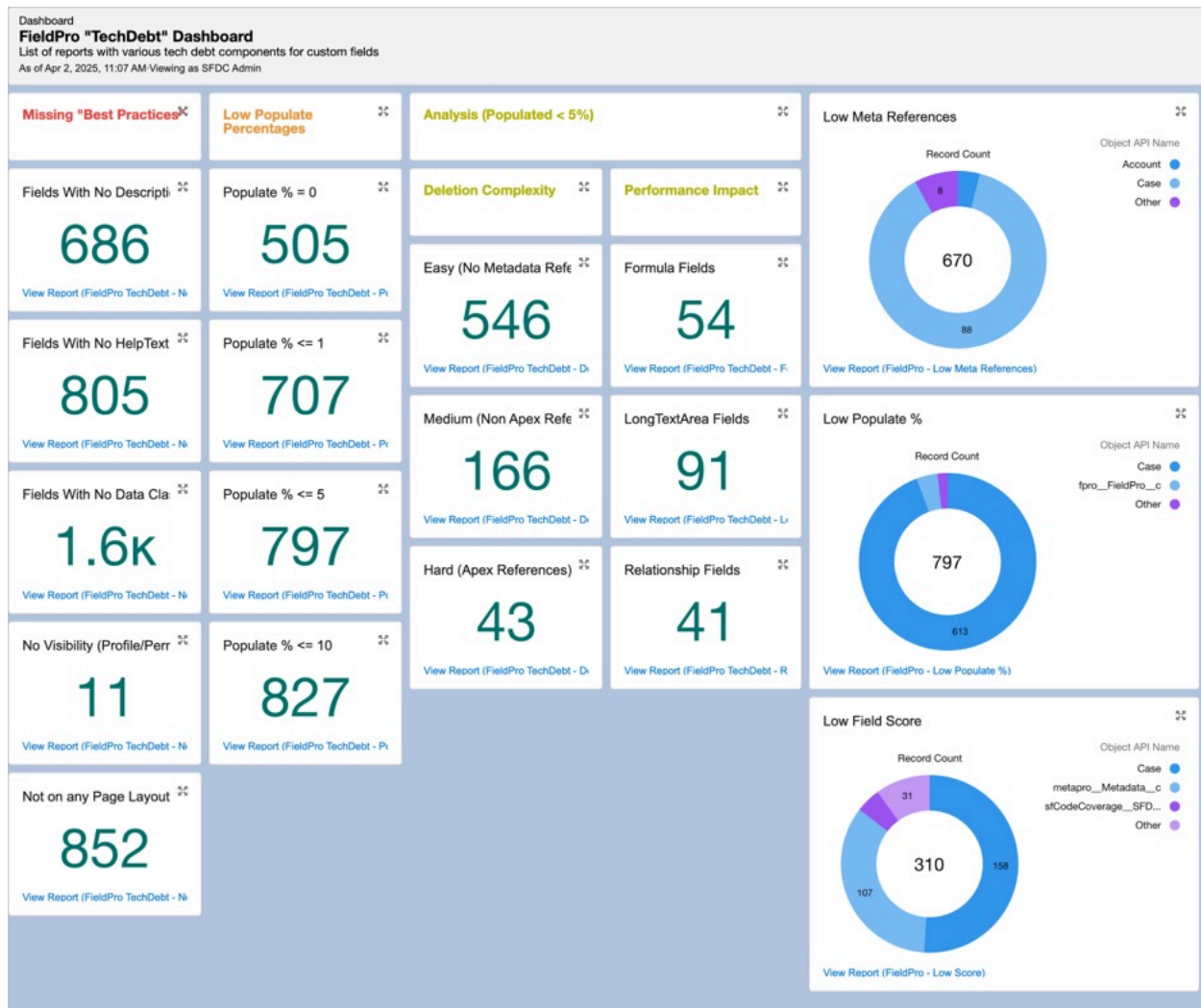
This allows teams to sequence cleanup work safely and avoid breaking production logic.

Technical Debt Dashboard

The **Field Technical Debt Dashboard** gives an org-wide view of field health:

- Fields grouped by usage, impact, and deletion complexity
- Visibility into permission sprawl and unused fields
- Clear breakdown of low-hanging cleanup opportunities

Use this dashboard to track progress and measure improvement over time.



Reports

FieldPro generates **exportable reports** to support planning and governance:

- Unused and underused fields
- Fields missing best practices
- Fields by deletion complexity
- High-impact fields affecting performance

Reports can be shared with architects, business owners, and release managers for approval and alignment.

Outcome

By combining **FieldTrip, Field Health scores, deletion complexity, dashboards, and reports**, FieldPro enables teams to:

- Reduce Salesforce technical debt safely
- Improve performance and usability
- Establish a repeatable, low-risk cleanup process

Field Health turns field cleanup from guesswork into a structured, confident operation.

Use Case: Identify and Deprecate Unused Custom Fields on the Case Object (4 Weeks)

Week	Step	Purpose	Actions
Week 1	Identify fields to delete	Find unused or low-usage fields	• Open FieldPro App • Click Run Service and submit the job on the Case object • Wait for job completion • Use Production or recent Full Copy Sandbox for accurate results
	Review job results	Analyze field usage	• Review FieldPro reports or results in the app • Identify low-usage and zero-usage fields
	Demo deletes	Validate safe deletion	• Create a new Developer Sandbox from Production • Attempt deleting identified fields • Remove fields that fail deletion due to dependencies or recent

			usage
Week 2	Notify users / business	Avoid business disruption	• Notify users about fields planned for deprecation • Share target deletion date • Allow 1 week for feedback • Remove fields from the list if issues are reported
Week 3	Remove field permissions	Prepare fields for deletion	• Backup Production FLS using a new Developer Sandbox • Use FieldPro reports to identify where FLS is provisioned • Optionally use FieldPro Field Actions to remove FLS in bulk • In FieldPro App: select object → select fields → click Edit → remove FLS • Optionally add (DEL) to field label and deprecation notice in help text
	Notify users (post-FLS removal)	Final validation	• Notify users that field access has been removed • Wait 1 week • Restore permissions for any fields reported as required
Week 4	Delete fields	Final cleanup	• Delete fields from sandboxes • Delete fields from Production
	Notify completion	Close the loop	• Inform users about fields successfully deleted

Misc. Features

Bulk Field Actions

FieldPro Bulk Field Actions

Overview

FieldPro Bulk Field Actions enable administrators to **clone, edit, and update multiple fields at once**, eliminating repetitive manual work in Salesforce Setup. These actions help reduce technical debt and accelerate large-scale field maintenance.

What It Does

- Perform bulk actions on selected fields
 - Clone fields between objects with optional FLS copy
 - Edit field properties across multiple fields simultaneously
 - Clean up field permissions before deprecation
-

Supported Actions

- Clone multiple fields from one object to another
 - Copy Field-Level Security (FLS) during cloning
 - Update field Description and Help Text in bulk
 - Add prefixes to Field API Name or Label (e.g., **(DEL)**) for deprecation tracking
 - Remove profile and permission set FLS for all users
-

How to Use

1. Open the **FieldPro App** Lightning tab
 2. Select one or more fields
 3. Click the **Edit** icon and choose the desired action
 4. Submit the job
-

Execution & Monitoring

- **Execution:** Realtime
- **Monitoring:**
 - Setup → Apex Jobs, or

- **FieldPro Jobs** object records

Key Benefits

- Reduces manual setup effort
 - Enables safe and consistent bulk updates
 - Accelerates technical debt cleanup
 - Simplifies large-scale field deprecation
-

When to Use

- Preparing fields for deprecation
 - Migrating or standardizing fields across objects
 - Cleaning up unused field permissions
 - Performing org-wide field maintenance
-

Use Cases

Field Cloning

The screenshot displays the FieldPro application interface. At the top, a navigation bar includes 'FieldPro', 'FieldPro App', 'FieldPro Dashboards', and dropdown menus for 'FieldPro', 'FieldPro Jobs', and 'RollupPro'. A modal window titled 'Field Actions' is open, with the subtitle 'Perform field cloning and edits in bulk'. Inside the modal, a table lists fields for cloning:

Label	Type	Object	Created	Score
Case Priority	Hierarchy	Case	Jun 12, 2025	45
Time to Resolution	MasterDetail	Case	Jun 16, 2025	0
Case Number	Base64	Case	Sep 14, 2025	20
Last Modified Date	Combobox	Case	Sep 21, 2025	30
Status	STRING	RollupPro Log	Jun 10, 2025	50
Org Id	STRING	FieldPro Customers	Oct 6, 2025	35
Email Sent (FieldPro Trial)	BOOLEAN	Leads Custom	Oct 22, 2025	10

To the right of the table, there are configuration options for the cloning action:

- Field Action:** A dropdown menu set to 'Field Cloning'.
- Copy Field Permissions?** A checkbox that is checked.
- Clone on same object?** A checkbox that is checked.
- Select Object To Clone Into:** A dropdown menu set to 'Account'.
- API Name (Add Prefix):** An empty text input field.
- API Name (Add Suffix):** An empty text input field.

At the bottom of the modal, there are 'Submit' and 'Close' buttons. Below the modal, a portion of the main application table is visible, showing columns for field details, scores, and dates.

Field Edits

Field Actions

Perform field cloning and edits in bulk

Label	Type	Object	Created	Score
Case Priority	Hierarchy	Case	Jun 12, 2025	45
Time to Resolution	MasterDetail	Case	Jun 16, 2025	0
Case Number	Base64	Case	Sep 14, 2025	20
Last Modified Date	Combobox	Case	Sep 21, 2025	30
Status	STRING	RollupPro Log	Jun 10, 2025	50
Org Id	STRING	FieldPro Customers	Oct 6, 2025	35
Email Sent (FieldPro Trial)	BOOLEAN	Leads Custom	Oct 22, 2025	10

Field Action

Field Edits

Description

Inline Help Text

Deprecating on 02/04/2026. Please raise a ticket if you are using this field.

Label (Add Prefix)

DEP_

API Name (Add Prefix)

Submit

Close

Field Remove Perms

Field Actions

Perform field cloning and edits in bulk

Label	Type	Object	Created	Score
Case Priority	Hierarchy	Case	Jun 12, 2025	45
Time to Resolution	MasterDetail	Case	Jun 16, 2025	0
Case Number	Base64	Case	Sep 14, 2025	20
Last Modified Date	Combobox	Case	Sep 21, 2025	30
Status	STRING	RollupPro Log	Jun 10, 2025	50
Org Id	STRING	FieldPro Customers	Oct 6, 2025	35
Email Sent (FieldPro Trial)	BOOLEAN	Leads Custom	Oct 22, 2025	10

Field Action

Field Remove Perms

Select Perms to remove

Available

Chosen

Profiles

Permission Sets

Submit

Close

Scan Schedules

FieldPro Scan Schedules

Overview

FieldPro Scan Schedules let admins schedule automated scans on Salesforce objects to capture **time-based snapshots of field population percentages**. This helps track usage trends over time and supports safe field optimization and deprecation.

What It Does

- Schedule FieldPro scans on one or more objects
- Run scans on a defined interval (weekly, monthly, etc.)
- Capture **historical snapshots** of field population percentages
- Enable trend comparison across time

Examples

- **Cases:** Run on the **1st of every month** to measure population of records created in the last month
- **Opportunities:** Run **every Sunday** to measure population of records created during the week

The screenshot displays the 'FieldPro Schedules-0040' configuration page. The top navigation bar includes 'FieldPro', 'FieldPro App', 'FieldPro Dashboards', 'FieldPro', 'FieldPro Jobs', 'RollupPro', and a dropdown for 'FieldPro Schedules-0040'. The main content area is divided into two sections. The left section, titled 'FieldPro Schedules-0040', contains a form with the following fields: 'FieldPro Schedules Name' (FieldPro Schedules-0040), 'Object API Name' (Case), 'Owner' (SFDC Admin), 'Active?' (checkbox), 'Run Frequency' (Daily), 'Save Results On' (FieldPro Records), 'Email Results?' (checkbox), 'Weekly Schedules' (1), and 'Monthly Schedules' (1). Below this is a 'Most Recent Job' section showing 'FieldPro Jobs-01175' with a status of 'Completed' and a progress bar. The right section, titled 'FieldPro Jobs (3+)', lists three jobs: 'FieldPro Jobs-01112', 'FieldPro Jobs-01115', and 'FieldPro Jobs-01120', each with details on Object Name, Apex Job Status, and Created By. A 'View All' link is at the bottom of this section. The bottom of the page shows 'Created By' (SFDC Admin, 3/7/2024, 9:26 AM) and 'Last Modified By' (SFDC Admin, 7/2/2024, 12:42 PM).

How to Configure

1. Open **FieldPro Schedules** (Lightning tab)
 2. Click **New** button
 3. Select **object(s)** and schedule frequency
 4. Save and activate
-

Monitoring

- **Setup** → **Apex Jobs**, or
 - **FieldPro Jobs** object records
-

Runtime

- **Minutes to hours**
 - Depends on:
 - Number of custom fields
 - Record volume on scheduled objects
-

When to Use

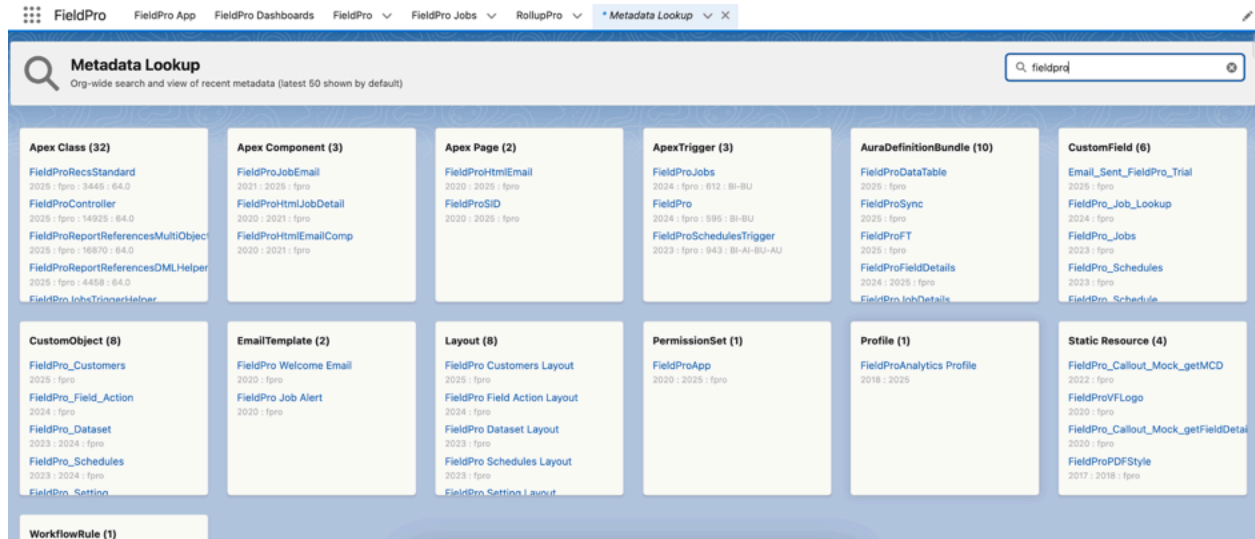
- Ongoing field usage monitoring
 - Adoption tracking after new field rollouts
 - Governance and audit readiness
 - Confident field deprecation decisions
-

Metadata Lookup

FieldPro Metadata Lookup

Overview

FieldPro Metadata Lookup provides a fast, real-time way to search Salesforce org metadata by name. It eliminates the need to navigate through Setup and multiple configuration pages.



What It Does

- Instantly searches org metadata
- Finds objects, fields, automation, profiles, layouts, and other components
- Runs in real time with no background jobs

How to Access

1. Open on the **Metadata Lookup** (Lightning tab)

Execution & Monitoring

- **Execution:** Realtime
- **Monitoring:** Not applicable (no Apex jobs created)

Key Benefits

- Saves time locating metadata
- Simplifies impact analysis before making changes
- Improves day-to-day admin productivity

When to Use

- Quickly locating fields or metadata by name
 - Investigating dependencies before updates or deletions
 - Admin troubleshooting and org exploration
-

Reports & Dashboards

FieldPro Reports & Dashboards

Overview

FieldPro Reports & Dashboards provide a centralized view of custom field health across your Salesforce org. They turn FieldPro scan results into **actionable insights** that help admins identify technical debt, performance impact, and safe cleanup opportunities.

What It Does

- Visualizes all custom fields across the org
 - Surfaces field usage, population, and risk signals
 - Highlights technical debt and optimization opportunities
 - Provides downloadable reports for analysis and audit needs
-

Available Reports & Dashboards

- **Field Dictionary** – Complete inventory of all standard and custom fields
 - **Field Technical Debt** – Fields grouped by risk, usage, and deletion complexity
 - **Object-Level Scan Reports** – Detailed results from FieldPro scans on individual objects
 - **Performance & Usage Views** – Identify low-usage and high-impact fields
-

How to Access

- **Dashboards:** Open the **FieldPro Dashboards** to view org-wide field analysis
 - **Reports:** Open **FieldPro** reports folder
-

Key Metrics Included

- Field population percentage
- Usage trends over time
- Metadata references and dependencies
- Deletion complexity (easy, medium, hard)
- Performance impact indicators

Key Benefits

- Eliminates manual field audits
- Provides data-driven cleanup recommendations
- Improves governance and audit readiness
- Enables confident, low-risk field deprecation

When to Use

- Reviewing org-wide field health
- Planning technical debt cleanup
- Supporting architecture and governance reviews
- Preparing documentation for audits or stakeholders

“FieldPro” Reports Folder

FieldPro

FieldPro AppFieldPro DashboardsFieldProFieldPro JobsRollupProReports

Reports

All Folders > FieldPro

65 items

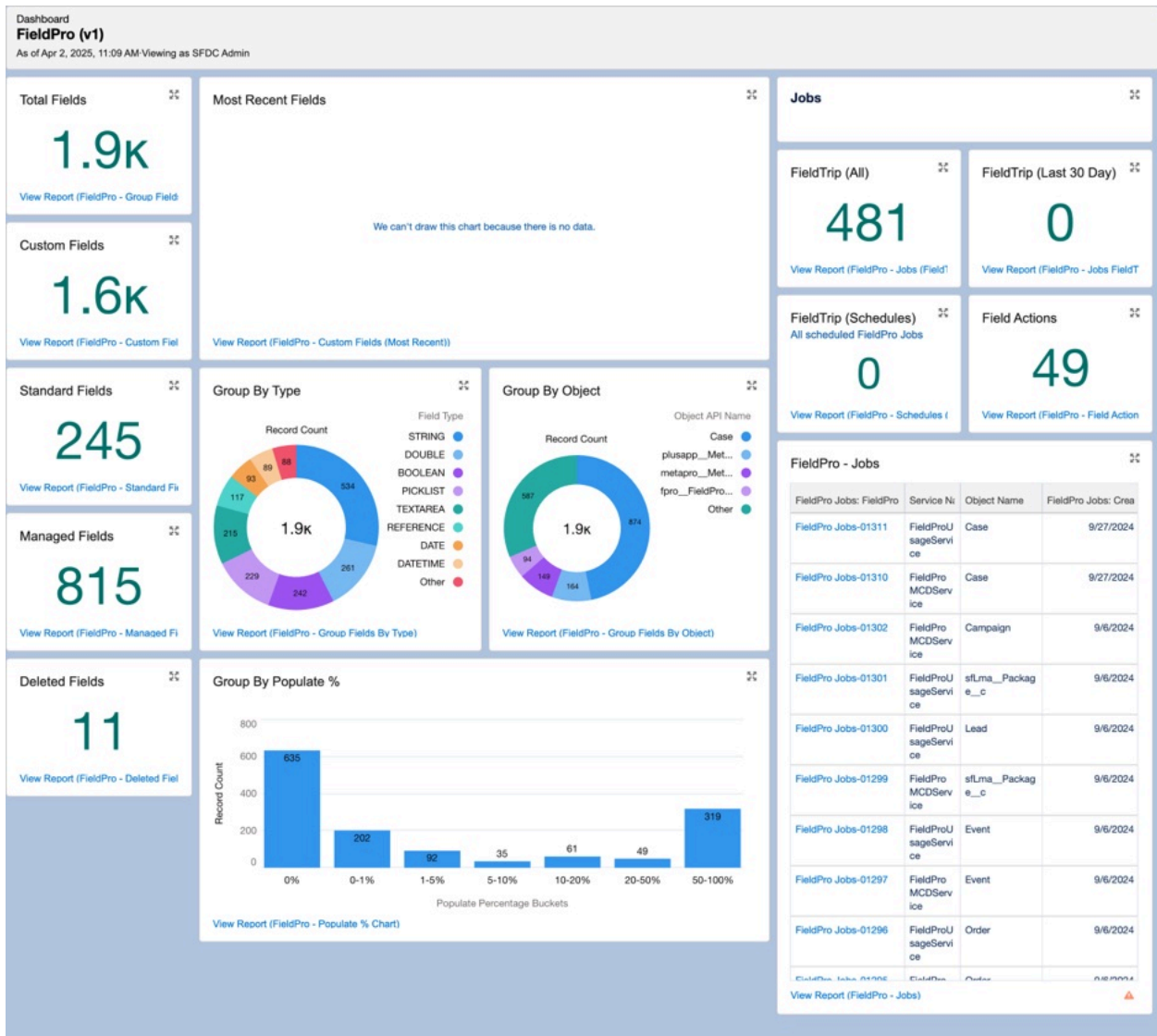
Search all folders...

New ReportNew Folder

REPORTS	Name	Description	Folder	Created By	Created On
Recent	FieldPro - Complete Object Analysis	Display all fields for an particular object with all analysis details.	FieldPro	SFDC Admin	12/15/2017, 10:04 AM
Created by Me	FieldPro - Custom Fields		FieldPro	SFDC Admin	6/18/2024, 11:41 AM
Private Reports	FieldPro - Custom Fields (Most Recent)		FieldPro	SFDC Admin	7/7/2024, 9:40 AM
Public Reports	FieldPro - Delete Potential (NEW)	List of custom fields with low Field Score. Consider them deprecating.	FieldPro	SFDC Admin	3/26/2020, 9:13 AM
All Reports	FieldPro - Deleted Fields	List of all custom fields that are deleted in the Org.	FieldPro	SFDC Admin	3/2/2023, 9:04 AM
FOLDERS	FieldPro - Field Actions		FieldPro	SFDC Admin	4/15/2024, 5:08 PM
All Folders	FieldPro - Field Score	List of custom fields with Field Score calculated.	FieldPro	SFDC Admin	3/16/2020, 9:10 PM
Created by Me	FieldPro - Fields with no description	List of custom fields with no description.	FieldPro	SFDC Admin	3/27/2020, 9:07 AM
Shared with Me	FieldPro - Group Fields By Object	FieldPro recs grouped by Object API Name, sorted by Count Desc	FieldPro	SFDC Admin	12/18/2017, 9:23 AM
FAVORITES	FieldPro - Group Fields By Object Type		FieldPro	SFDC Admin	6/28/2025, 8:11 PM
All Favorites	FieldPro - Group Fields By Score		FieldPro	SFDC Admin	7/7/2022, 11:26 AM
	FieldPro - Group Fields By Type	FieldPro recs grouped by field_type	FieldPro	SFDC Admin	3/20/2019, 9:10 AM
	FieldPro - Group Fields By Type (Status)		FieldPro	SFDC Admin	7/1/2025, 6:57 PM
	FieldPro - Jobs	List of jobs submitted in FieldPro App	FieldPro	SFDC Admin	4/21/2020, 2:50 PM
	FieldPro - Jobs (FieldTrip)		FieldPro	SFDC Admin	6/18/2024, 12:04 PM
	FieldPro - Jobs (Group By Service)		FieldPro	SFDC Admin	9/5/2025, 5:54 PM
	FieldPro - Jobs (Metadata References)		FieldPro	SFDC Admin	7/19/2025, 12:51 PM

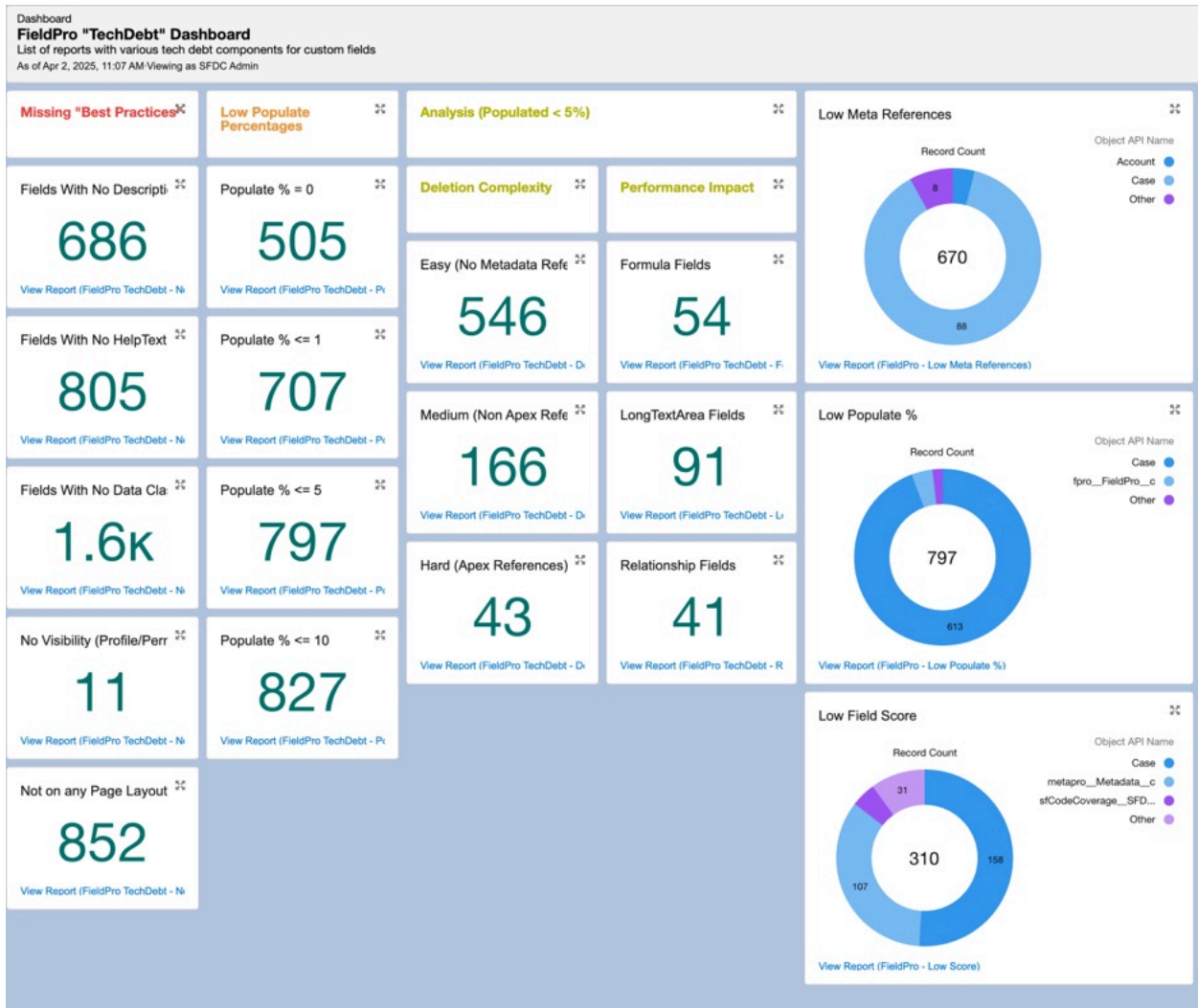
FieldPro Dashboard “Field Dictionary”

Visual representation of all custom fields in your Salesforce organization.



FieldPro Dashboard “Field Health”

A detailed view of all custom fields, segregated by tech debt, performance impact, deletion complexity, and performance gain. This is similar to scan results, but for the whole organization.



RollUpPro

FieldPro Field Rollups – White Paper

Enabling Scalable, No-Code Field Rollups for Smarter Salesforce Data Management

Executive Summary

As Salesforce environments evolve, administrators face increasing demands to maintain data quality while reducing manual intervention. **FieldPro**, already a trusted tool for custom field management and optimization, now introduces **Field Rollups** — a native, no-code solution to automate aggregate data calculations such as counts, sums, and averages directly within Salesforce.

1. The Challenge of Aggregated Data Management in Salesforce

Many Salesforce organizations rely on rollup summaries to surface key business metrics at the parent record level, such as the total value of related Opportunities on an Account.

However, Salesforce's out-of-the-box rollup summary fields are limited to **master-detail relationships**. Extending rollup logic to lookup relationships or complex filter criteria often requires custom Apex development, third-party tools, or manual processes — increasing maintenance cost and technical risk.

2. Introducing FieldPro Field Rollups

FieldPro Field Rollups removes these limitations by enabling Salesforce administrators to:

- Define rollup jobs on **any object and relationship type**
- Support both **standard and custom objects**
- Work with **master-detail and lookup relationships**
- Automate aggregate calculations such as **COUNT, SUM, and AVG**
- Run rollups **on-demand or on a schedule**
- Process large datasets using **native asynchronous Apex** for performance and reliability

All of this is delivered **without writing code**.

3. How Field Rollups Works

Field Rollups allows administrators to configure rollup definitions directly from the FieldPro app. Jobs can be executed on-demand or scheduled at regular intervals.

The solution uses asynchronous Apex processing to efficiently handle large volumes of records, ensuring scalability and stability. No Apex coding, Flow configuration, or external tooling is required.

4. Key Benefits

FieldPro Field Rollups delivers:

- **Speed** – Quickly surface aggregate insights without development cycles
 - **Flexibility** – Support for complex filters and relationship types
 - **Scalability** – Efficient processing of large datasets
 - **Security** – Native Salesforce permission enforcement
 - **Time Savings** – Reduced dependency on developers and manual updates
-

5. Example Use Cases

Below are representative examples across different aggregate types, filters, and relationships.

Count Rollups

- Count of open Opportunities per Account
- Number of active Cases per Customer
- Count of high-priority Tasks per Project
- Number of Calls logged by a rep today
- Count of Contacts with Email per Account

Sum Rollups

- Sum of Opportunity Amounts per Account
- Sum of Invoice Amounts per Project
- Sum of Hours logged on Tasks per Case
- Sum of Line Item Subtotals per Quote
- Sum of Donation Amounts per Campaign

Average Rollups

- Average Opportunity Age per Account
- Average Lead Score per Source Campaign
- Average Time to Close per Opportunity Owner
- Average Customer Satisfaction Rating per Agent
- Average Task Duration per Project

Min / Max Rollups

- Maximum Discount Percentage per Account
- Minimum Time to First Response per Case
- Latest Invoice Due Date per Project
- Earliest Start Date of active Campaign Phases
- Largest Payment Amount per Vendor

Advanced Filters & Relationships

- Count of Opportunities where Stage = “Proposal” and Amount > 50K
- Sum of billable Hours where Task Status = Completed
- Average Maintenance Cost for Assets of type “Vehicle”
- Maximum Contract End Date where Status = Active
- Rollups across both **Master-Detail and Lookup relationships**

6. Security and Compliance

FieldPro Field Rollups inherits Salesforce’s robust security model and operates entirely within the authenticated user’s context.

Key security characteristics include:

- All operations respect **object-level and field-level security (FLS)**
- No external API calls — processing occurs entirely within Salesforce
- Only records and fields accessible to the user are processed
- Compliant with Salesforce AppExchange Security Review standards
- Aligned with **GDPR, CCPA, and SOC 2** principles

7. Installation Guide

To enable FieldPro Field Rollups:

Assign Permission Set

Assign the **FieldProApp** permission set to administrators or users responsible for configuring rollups.

Schedule Rollup Job

Schedule the RollUpProScheduler Apex job to execute active rollups at regular intervals. Run the following in **Developer Console** → **Execute Anonymous**:

```
fpro.RollUpProScheduler scheduler = new fpro.RollUpProScheduler();  
  
System.schedule(  
    'RollUpProScheduler (Runs Every Hour)',  
    '0 0 * * * ?',  
    scheduler  
);
```

Use a service account with read/write access to all relevant objects.

Optional: Generate Demo Workflows

For demonstration purposes only, sample rollup definitions can be created using:

```
fpro.RollUpProUtils.createDemoRecords();
```

These demo workflows are not intended for production use.

8. Competitive Advantage

FieldPro Field Rollups is fully integrated into the FieldPro platform, combining:

- Metadata intelligence
- Field health analysis
- Rollup automation
- Enterprise-grade security

All within a **single, lightweight Salesforce-native app**, without third-party dependencies or additional infrastructure.

9. Future Outlook

Planned enhancements include:

- AI-driven suggestions for commonly required rollups
 - Visual designers for complex relationship mapping
 - Audit dashboards for rollup execution and history
-

10. Conclusion

Field Rollups extends FieldPro's mission of empowering Salesforce administrators with a **secure, scalable, no-code toolkit** for smarter data management.

Upgrade to the latest version of FieldPro and activate **Field Rollups** to automate aggregate calculations with confidence and ease.

Compliance / FAQs

Case Study

FieldPro: Case Study

Streamlining Salesforce Efficiency with FieldPro at Horizon Tech Solutions

Company Overview

Horizon Tech Solutions is a mid-sized technology consulting firm specializing in cloud-based solutions for small and medium-sized businesses. With a team of 150 employees and a growing client base of over 300 companies, Horizon relies heavily on Salesforce to manage customer relationships, track project milestones, and deliver tailored solutions. Over the years, their Salesforce instance had accumulated hundreds of custom fields across various objects, leading to performance slowdowns, administrative overhead, and confusion among end users.

The Challenge

By early 2025, Horizon's Salesforce environment had become unwieldy. Their Sales, Service, and Project Management teams had created numerous custom fields to accommodate unique client requirements and internal processes. However, many of these fields were no longer in use or had become redundant due to evolving business needs. Administrators struggled to identify which fields were still valuable and could be safely removed. This clutter led to:

- **Performance Issues and Degradation:** Excessive custom fields slow down page loads, queries, and reports.
- **User Frustration:** Employees found it hard to navigate cluttered object layouts. Cluttered layouts confuse users and increase training time.
- **Administrative Burden:** The team spent hours manually reviewing fields, with no clear way to assess their usage. Manual audits of field usage are time-consuming and error-prone.
- **Hitting governor limits:** Some objects, like Cases and Opportunities, are nearing governor limits concerning custom fields
- **Cost Implications:** Unoptimized orgs may require additional storage or licensing.

With a goal to optimize their Salesforce org ahead of a major product launch in Q2 2025, Horizon needed a solution to quickly analyze and clean up their custom fields without disrupting day-to-day operations.

The Solution: FieldPro

Horizon’s Salesforce Admin, Sarah Patel, discovered **FieldPro** on the Salesforce AppExchange. Billed as a lightweight, one-page application designed to calculate custom field health and generate actionable reports, FieldPro seemed like the perfect fit. After a quick installation in March 2025, Sarah and her team put it to the test.

FieldPro's key features included:

- **Field Dictionary:** Download all field metadata and metadata relationships into a custom object.
- **Custom Field Health Analysis:** A comprehensive scan of all custom fields across objects like Accounts, Opportunities, and Cases.
- **Reports & Dashboards:** Generates exportable reports on the complete field dictionary and usage.

The ability to process objects of any size is critical for Horizon's extensive Salesforce setup.

Sarah ran FieldPro’s optimizer on their largest object, **Cases**, which contained over 800 custom fields. Within minutes, the tool generated a detailed report highlighting:

FieldPro

FieldPro App

FieldPro Dashboards

FieldPro

FieldPro Jobs

RollupPro

FieldPro Jobs

FieldPro Jobs-01456

Job

Job Details

fieldpro@force.com
7/14/2025, 9:14 AM
SELECT [ALL FIELDS] FROM Case
Completed

Object Details

Case(Case)
762 Total Fields
708 Custom Fields
255 Tech Debt*
~786 number of records

Technical Debt Review

Best Practices

708 Missing Data Classifications
23 No Layouts
108 No Permissions

Performance Impact

113 0% Populated
196 Less Than 1% Populated
255 Less Than 5% Populated
255 Less Than 10% Populated

Fields Populated Less Than 5%

Deletion Complexity

120 Easy (No Metadata Refs)
63 Medium (Non Apex Refs like flows, layouts)
72 Hard (Apex Refs like apex, triggers)

Performance Gain

21 Relationship Fields
39 Long/Rich Text Fields

Related

Details

FieldPro Jobs Name

FieldPro Jobs-01456

Service Name

FieldProUsageService

Object (Report)

Case

Object Name

Case

FieldTrip SOQL

SELECT [ALL FIELDS] FROM Case

Status Bar

Apex Job Details (Auto Fill - Do Not Modify)

Apex Job Status

Completed

Apex Job Submitted_By

fieldpro@force.com

Apex Job Id

707Hp0000KdSZ4fl1QG

Apex Job SubmittedDate

7/14/2025, 9:14 AM

Apex Job Id (Parent)

707Hp0000KdSYs1l1QG

Apex Job CompletedDate

7/14/2025, 9:14 AM

Apex Job JobItemsProcessed

1

Apex Job ExtendedStatus

Apex Job TotalJobItems

1

Time to complete (minutes)

0

Apex Job NumberOfErrors

0

(Deleted) Apex Job details

- Flagged fields missing best practices, like description, data categorization, etc.

- 400+ fields with zero usage in the past 12 months.
- 600+ fields used in fewer than 10% of records.
- 400+ fields as easy deletes, with no metadata references
- 150+ fields flagged as medium deletes, with soft metadata references, like flows, workflows, email templates, etc.
- 30+ fields flagged as hard deletes, with apex metadata references, like triggers, apex etc

Implementation

Armed with FieldPro's insights, Horizon's team took a phased approach, spreading the field deprecation process into 4 weeks as listed below.

Use Case: Cleanup "Case" Object		
	Step Name	Actions
Week 1	Identify fields to delete	Run "FieldPro" on object - Open "FieldPro App". Click the "Run Service" button and submit the job on the object - Wait for the job to complete - Note: Use Production or recent Full Copy Sandbox for complete results
		Review job results - Use FieldPro reports, or FieldPro App to identify low usage fields
		Demo deletes - Create a new developer sandbox from production - Try deleting the identified fields to gain confidence - Remove fields that were unable to be deleted due to complex metadata relations, or were new, etc.
Week 2	Notify Users/Business	Notify users on fields targeted for deprecation. - Give a week's notice to reply and targeted date of deletion - Remove fields from the deprecation list if issues were raised
Week 3	Remove Field Permissions	Remove FLS from both profiles and permissions sets in Production - Backup Production FLS, by creating a new developer sandbox - FieldPro report will show the areas the FLS is provisioned - Optionally, use FieldPro Field Actions to perform this in bulk - Open "FieldPro App". Select the object. Select the fields to deprecate. Click the "Edit" icon, submit the job to remove FLS - Optionally, also, add a (DEL) to the field label and an inline help text saying that these will be deprecated on this date.
		Notify users that FLS has been removed from Production - Wait for a week - Revert permissions on fields where issues are reported by business or external integrations
Week 4	Delete Fields	Delete fields from sandboxes and production
		Notify users on fields successfully deleted

Results

Within a month of implementing FieldPro, Horizon Tech Solutions saw measurable improvements:

- **Performance Boost:** Page load times decreased by 25%, and report generation sped up by 30%.

- **User Satisfaction:** Employees reported a cleaner, more intuitive interface, reducing training time for new hires by 15%.
 - **Admin Efficiency:** Sarah's team saved over 20 hours per month on manual field audits, allowing them to focus on strategic projects.
 - **Cost Savings:** By optimizing their Salesforce org, Horizon avoided the need for additional storage upgrades, saving an estimated \$10,000 annually.
-

Testimonial

"FieldPro turned a daunting cleanup project into a quick win for our team," said Sarah Patel, Salesforce Administrator at Horizon Tech Solutions. "Its simplicity and speed gave us the confidence to declutter our Salesforce instance without second-guessing. We're now running a leaner, faster system that our users love."

Conclusion

For Horizon Tech Solutions, FieldPro proved to be a game-changer in maintaining a healthy Salesforce environment. As they prepare for their Q2 2025 product launch, the company is confident that their optimized CRM will support their growth without missing a beat. FieldPro's ability to deliver fast, actionable insights has made it an indispensable tool in their Salesforce toolkit.

Security & Compliance

FieldPro: Security Compliance

1. Overview

FieldPro is a lightweight one-page application that enables Salesforce users to calculate the custom field's health. Run the optimizer on objects of any size and generate reports on unused custom fields that can be considered deprecated within minutes. This Security Compliance Document outlines the measures taken to ensure FieldPro adheres to Salesforce security standards, protects customer data, and complies with applicable regulations as an AppExchange app.

2. Security Objectives

- Ensure the confidentiality, integrity, and availability of customer data and metadata processed by FieldPro.
 - Comply with Salesforce AppExchange Security Review requirements.
 - Mitigate risks associated with unauthorized access, data breaches, and misuse of permissions.
 - Align with industry standards such as GDPR, CCPA, and SOC 2, where applicable.
-

3. Application Architecture

FieldPro operates as a managed package within the Salesforce Platform, leveraging native Salesforce security features. It is a single-page application hosted on Salesforce servers, ensuring no external hosting vulnerabilities. Key components include:

- Field Dictionary: Download all field metadata and metadata relationships into a custom object.
 - Field Health Analyzer: Scans custom fields and calculates usage metrics.
 - Reports & Dashboards: Generates exportable reports on the complete field dictionary and usage.
-

4. Data Handling and Privacy

4.1 Data Processed

FieldPro uses Salesforce APIs to access metadata related to custom fields within a Salesforce org, including:

API	API Name	Details
SOAP	Describe CustomField	Basic information like Field name, object name, field type, etc
Tooling	CustomField	Field complete details, like ID, description, help text, picklist values, compliance categorization, length, etc.
Tooling	MetadataComponentDependency	Field metadata relationships and dependencies
Apex	SOQL	Usage statistics. Field's Populate Percentage, sample values, last populated date, and record

No personally identifiable information (PII) is collected.

4.2 Data Storage

- **Temporary Storage:** FieldPro processes data in-memory during analysis and report generation, with no persistent storage outside Salesforce.
- **Report Exports:** Generated reports are stored in Salesforce as downloadable files (e.g., CSV) and are subject to the org's data retention policies.
- **Encryption:** Follows Salesforce's AES-256 encryption standards.

4.3 Data Access

- FieldPro operates under the user's Salesforce permissions, requiring at least "Customize Application" privileges to function fully.
- The "FieldProApp" permission set is required to use the app in Salesforce.
- No external API calls or third-party integrations are utilized, minimizing exposure.

5. Security Controls

5.1 Authentication

- FieldPro uses Salesforce logged in users' session ID, ensuring users are authenticated via their existing credentials.
- No additional login mechanisms are required.

5.2 Authorization

- Access is restricted to users with appropriate Salesforce profiles or permission sets (e.g., System Administrator).
- The “FieldProApp” permission set ensures that only authorized users can run scans or export reports.

5.3 Input Validation

- All user inputs (e.g., object selection) are validated server-side to prevent injection attacks (e.g., SOQL injection).
- FieldPro leverages Salesforce’s built-in platform security to sanitize inputs.

5.4 Session Management

- Sessions are managed by Salesforce, with automatic timeouts based on org settings.
- No local session data is stored by FieldPro.

5.5 Logging and Monitoring

- FieldPro logs basic operational events (e.g., scan initiation); or exceptions.
- No sensitive data is included in logs.

6. Compliance with Salesforce AppExchange Security Requirements

FieldPro has undergone the Salesforce AppExchange Security Review process, adhering to:

- **Secure Coding Standards:** No use of unsafe SOQL queries or dynamic Apex that could expose vulnerabilities.
 - **Permission Management:** Minimal permissions requested, scoped to metadata access only.
 - **Penetration Testing:** Simulated attacks (e.g., XSS, CSRF) mitigated through Salesforce Lightning Component Framework protections.
 - **Security Health Check:** No critical vulnerabilities were reported in pre-submission scans.
-

7. Regulatory Compliance

- **GDPR:** No PII is processed; data minimization principles are followed.
 - **CCPA:** Customers control data export and deletion via Salesforce org settings.
 - **SOC 2:** Aligns with Salesforce's SOC 2 Type II certification for hosted apps.
-

8. Incident Response

- In case of a security incident, FieldPro relies on Salesforce's incident response framework.
 - Customers are notified via Salesforce Trust (trust.salesforce.com) for platform-wide issues.
 - App-specific issues are reported to the developer via support channels within 24 hours of detection.
-

9. Maintenance and Updates

- **Patch Management:** FieldPro follows a quarterly update cycle, with security patches deployed as needed.
 - **Version Control:** The current version (1.81) includes all security enhancements as of April 2025.
 - **Deprecation Policy:** Features are deprecated with a 6-month notice to customers.
-

10. Customer Responsibilities

- Configure user permissions to limit FieldPro access to authorized personnel.
 - Review package reports and dashboards for sensitive data before distribution.
-

11. Contact Information

- **Support:** fieldproadmin@umanjali.com
 - **Security Issues:** fieldproadmin@umanjali.com
-

Conclusion

FieldPro is designed with security and compliance as core priorities, leveraging Salesforce's robust platform security to protect customer data and ensure operational integrity. By adhering to AppExchange standards and minimizing its data footprint, FieldPro provides a secure solution for Salesforce administrators to optimize their orgs effectively.

FAQs

FieldPro – Frequently Asked Questions (FAQ)

1. What is FieldPro?

FieldPro is a lightweight Salesforce AppExchange app that helps administrators **analyze, optimize, and clean up custom fields** across their Salesforce org. It identifies unused, underused, and high-impact fields so you can safely reduce tech debt and improve performance.

2. Who should use FieldPro?

FieldPro is designed for:

- Salesforce **Admins**
- **Architects**
- **Technical Leads**
- Salesforce **Operations / CoE teams**

It is especially useful for orgs with **large numbers of custom fields** or long Salesforce history.

3. What problems does FieldPro solve?

FieldPro helps you:

- Identify **unused or low-usage custom fields**
 - Reduce **page load and report performance issues**
 - Avoid hitting **Salesforce custom field limits**
 - Clean up **technical debt**
 - Save hours of **manual field audits**
-

4. What Salesforce objects are supported?

FieldPro supports **all standard and custom objects**, including high-volume objects like:

- Account
- Opportunity

- Case
- Custom objects

There is **no object size limitation**.

5. How does FieldPro determine field usage?

FieldPro analyzes:

- Field population percentage
- Sample record data
- Last populated dates
- Metadata dependencies (Flows, Apex, Reports, etc.)

This helps classify fields as **easy, medium, or hard to delete**.

6. Does FieldPro delete fields automatically?

 No.

FieldPro **never deletes anything automatically**.

It provides **reports and insights** so admins can make safe, informed decisions.

You stay fully in control.

7. Can FieldPro bulk edit or clone fields?

 Yes.

FieldPro supports **bulk field actions**, including:

- Clone multiple fields
 - Edit descriptions and help text
 - Add prefixes like (DEL) for deprecation
 - Remove Field-Level Security (FLS) in bulk
-

8. Does FieldPro work in Production?

✔ Yes.

FieldPro is safe to run in:

- Production
- Full Copy Sandbox
- Partial / Developer Sandboxes

For best results, **Production or recent Full Copy sandboxes** are recommended.

9. How long does a scan take?

Scan duration depends on:

- Number of custom fields
- Number of records
- Object complexity

Typical times:

- Small objects: **2–10 minutes**
- Large objects (500+ fields): **30–90 minutes**

All scans run asynchronously in the background.

10. Can scans be scheduled?

✔ Yes.

FieldPro allows **scheduled scans**, such as:

- Monthly scans for trend tracking
 - Weekly scans for active objects
 - Snapshot comparisons over time
-

11. Does FieldPro store or access business data?

🔒 No business or customer data is stored.

FieldPro:

- Works primarily with **metadata**
 - Uses Salesforce APIs
 - Does **not** store PII
 - Does **not** send data outside Salesforce
-

12. Is FieldPro secure and AppExchange compliant?

 Yes.

FieldPro:

- Passed Salesforce **AppExchange Security Review**
 - Uses Salesforce native authentication
 - Runs entirely within Salesforce
 - Follows GDPR and CCPA principles
-

13. What permissions are required?

Users need:

- The **FieldProApp** permission set
- Typically **System Administrator** or equivalent access

FieldPro always respects **user permissions**.

14. Will FieldPro impact Salesforce performance?

 No negative impact.

FieldPro runs jobs asynchronously and is designed to:

- Minimize API usage
- Avoid UI blocking
- Respect Salesforce governor limits

Many customers see **performance improvements** after cleanup.

15. Can FieldPro be used during audits or org cleanups?

✓ Absolutely.

Common use cases:

- Pre-migration cleanup
 - Org health audits
 - Release readiness
 - Governor limit risk assessment
 - Technical debt reduction initiatives
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16. Is FieldPro suitable for enterprise orgs?

✓ Yes.

FieldPro is built to handle:

- Hundreds or thousands of custom fields
 - Large enterprise Salesforce orgs
 - Multi-team admin environments
-

17. How often should we run FieldPro?

Recommended cadence:

- **Monthly** for active objects
 - **Quarterly** for full org reviews
 - **Before major releases or migrations**
-

18. Does FieldPro provide reports?

✓ Yes.

FieldPro generates **exportable reports and dashboards** showing:

- Field usage
- Deletion complexity
- Performance impact

- Technical debt indicators
-

19. Is any setup or coding required?

 No coding required.

Setup takes:

- ~10 minutes to install
 - Assign permission set
 - Start scanning immediately
-

20. Why are some standard objects (e.g., Campaign) missing in FieldPro?

Some standard objects may not appear until their metadata is synced.

Solution:

- Open the **FieldPro App**
 - Click **Sync Options** (top-right)
 - Run the **Basic** action
 - Wait ~5 minutes for completion
 - Recheck FieldPro App to see if the object/fields (e.g., Campaign) are now available
-

21. Why are some standard fields missing in FieldPro?

FieldPro skips some by default to prevent overflow, so use this to pull them on demand.

Solution:

- Open the **FieldPro App**
- Click **Sync Options** (top-right)
- Run **Standard Fields** action (select object to fetch all standard fields for)
- Wait ~5 minutes for completion
- Recheck FieldPro App to see if the missing standard fields are now available

Support

FieldPro Support

- **Support Email**

-  fieldproadmin@umanjali.com
 - Contact us for setup help, issues, questions, or feature requests
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- **Try FieldPro**

- Install / try FieldPro using this link:
 -  FieldPro AppExchange Link – Version 1.105
 - </packaging/installPackage.apexp?p0=04tHp000001CgWo>
 -  Includes 3 free object scans per Salesforce org where FieldPro is installed
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- **Free Demo**

- Schedule a free 1:1 demo to see FieldPro in action
 - Walkthrough of scans, reports, and bulk field actions
 -  Book a demo: <https://calendly.com/fieldproteam/30min>
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- **What We Help With**

- Field scans & optimization
 - Missing fields / metadata issues
 - Bulk field actions (clone, edit, deprecate)
 - Best practices for safe field cleanup
 - Performance & technical debt guidance
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