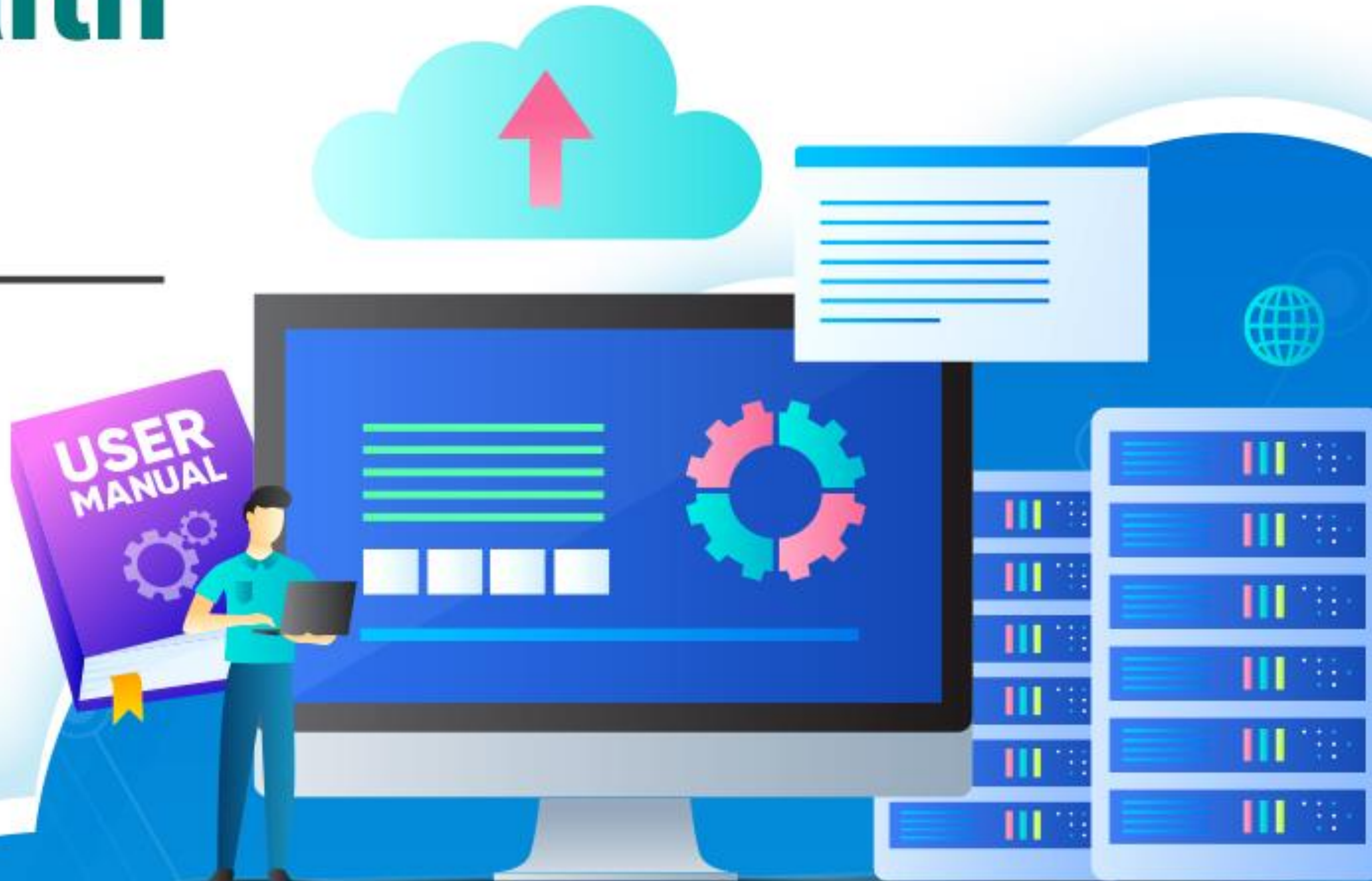
Aress Software & Education Technologies (P) Ltd.

Technology that Impacts Business

ORG Health Tracker

User Manual



salesforce
PARTNER

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Technology that Impacts Business

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Introduction

In the dynamic world of business, maintaining the health and efficiency of your Salesforce org is paramount. As your organization grows and evolves, so do the complexities within your Salesforce instance. Ensuring its optimal performance becomes not just a necessity but a strategic imperative.

Enter the Salesforce Org Health Tracker app, your comprehensive solution available on the Salesforce AppExchange. Designed to empower Salesforce administrators, developers, and stakeholders, this app revolutionizes the way you monitor, analyze, and enhance your Salesforce org's health.

Overview

The Salesforce Org Health Tracker App provides administrators with a comprehensive toolkit for visualizing and managing various facets of their organization's configuration and usage. With features ranging from storage utilization to user profiles and metadata analysis, this application equips administrators with the insights necessary to enhance the efficiency and effectiveness of their Salesforce instance.

Objective

The Salesforce Org Health Tracker App is meticulously crafted to empower administrators with comprehensive insights and analytics for monitoring, managing, and optimizing their Salesforce organization's health and performance.

By furnishing detailed visualizations, reports, and analyses of critical metrics like data storage utilization, integration setups, user licenses, and more, the app enables administrators to make informed decisions, preemptively tackle challenges, and uphold the smooth operation of their Salesforce environment.

Emphasis on bolstering data visibility, refining processes, and ensuring compliance, the app facilitates administrators in maximizing the value and efficiency of their Salesforce deployment, thereby fostering organizational success and expansion.

Key Features

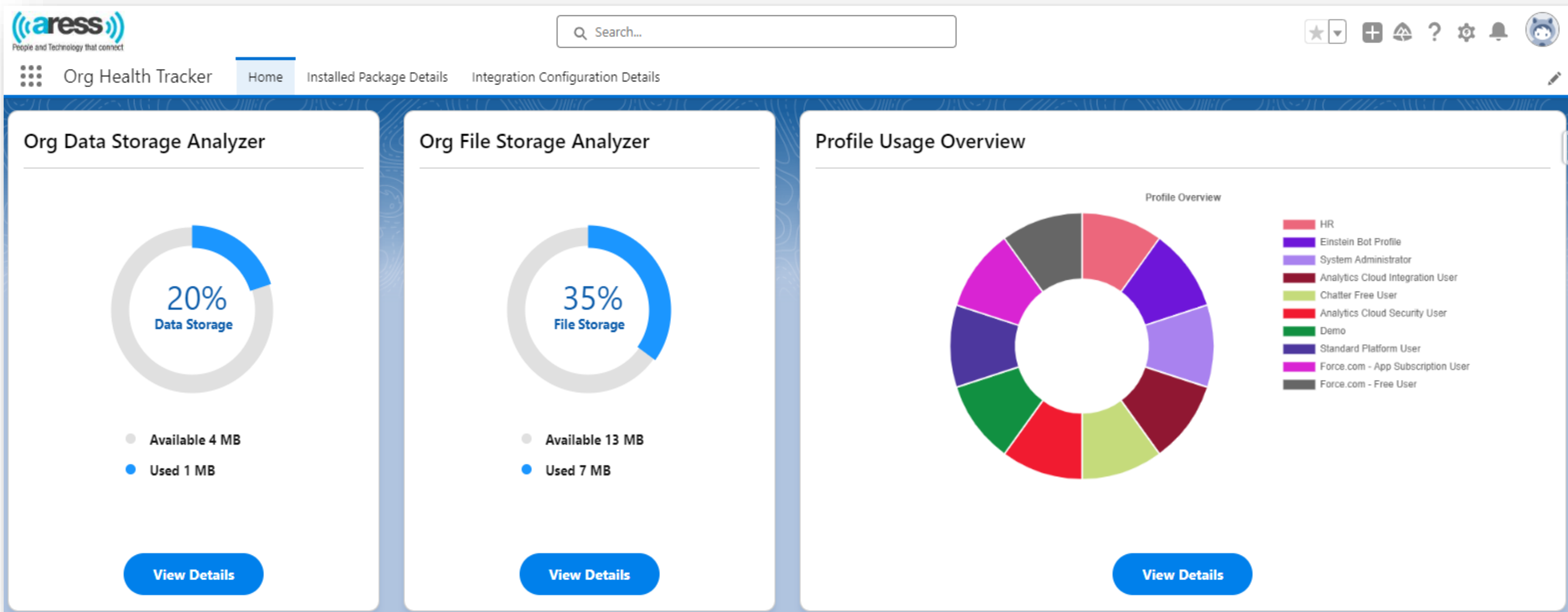
1. **Org Storage Visualization:** Gain a holistic view of your organization's storage usage through intuitive visualizations.
    - **Object Storage Details:** Dive deep into object storage utilization, with detailed visualizations to identify areas of focus.
    - **File Object Storage Visualization:** Easily track file storage usage over time using customizable date filters.
2. **Profile & Users Overview:** Experience a dynamic user interface that effortlessly visualizes profiles and their assigned users along with user status.
3. **User License Details:** Obtain insights into user licenses, including permission set licenses and feature licenses.
4. **Role-user Hierarchy Visualization:** Empowers administrative experience with captivating Role-user Hierarchy Visualization, offering an intuitive graphical display of role hierarchies alongside their associated users, empowering seamless user role management at a glance.
5. **Static Resource Usage:** Visualize static resources created in the organization, specifying storage usage in megabytes and displaying available storage.
6. **Apex Coverage Visualization:** Tracks the comprehensiveness of your org apex code, enables monitoring of test class coverage to visualize both uncovered and covered line counts for robust code quality assurance.
7. **Installed Package Details:** Explore information about org-managed and unmanaged packages installed in your Salesforce instance.
8. **Integration Details Visualization:** Explore integration details including connected apps, named credentials, remote site settings, and OAuth provider details.
9. **Scheduled Email Notification:** Offers two types of email notifications supporting administrators with essential insights into their organization's health status.

Navigating the Interface

A. Health Tracker Dashboard:

The **Home** tab serves as the central dashboard within the Salesforce Org Health Check App, providing administrators with an at-a-glance overview of key metrics and insights regarding their Salesforce organization.

Here's a breakdown of the components available on the Home Tab:



Org Data Storage Analyzer:

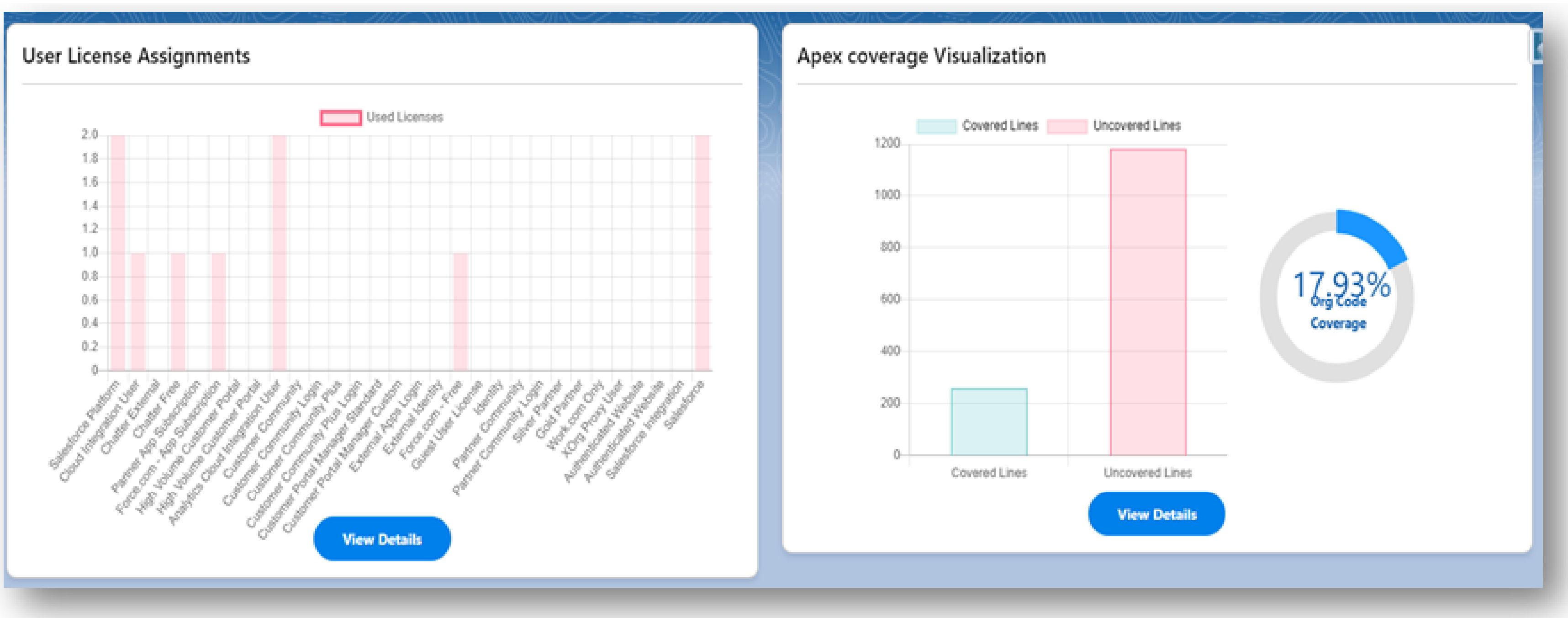
- This section presents graphical representations of Available and Used Org data Storage.

Org File Storage Analyzer:

- Like the Data Storage Analyzer, this section offers visualizations of Available and Used Org File Storage.

Profile Usage Overview:

- Here, administrators can view a summary of profile usage within the organization. This includes donut charts to show such as the number of active profiles, the distribution of profile assignments across users, and any notable trends or anomalies in profile utilization. This overview empowers administrators to ensure that profiles are effectively configured and utilized throughout the organization.

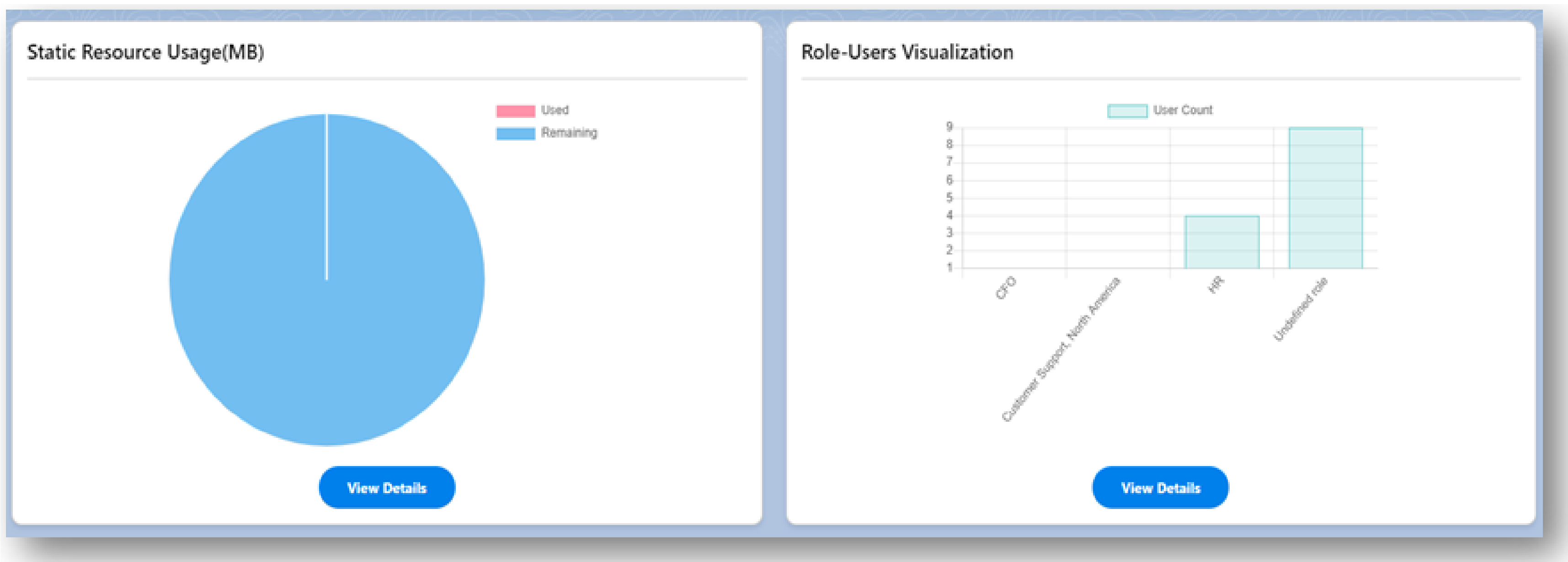


User License Assignments:

- This section provides insights into user license assignments within the organization. Administrators can visualize the distribution of user licenses across different license types, track license utilization rates, and identify any potential discrepancies or inefficiencies in license allocation. This information enables administrators to optimize license usage and ensure compliance with licensing agreements.

Apex Coverage Visualization:

- Administrators can assess the test coverage of Apex code within the organization through interactive visualizations on this tab. This includes graphs illustrating the percentage of code covered by tests, as well as detailed breakdowns of coverage by individual Apex classes or triggers. Administrators can identify areas of code with insufficient test coverage and prioritize efforts to improve code quality and reliability.



Static Resource Usage:

- This section offers insights into the utilization of static resources within the organization. Administrators can track resource consumption, monitor usage trends over time, and identify opportunities for optimization or cleanup. Visualizations include charts depicting resource usage by type, size, or frequency of access.

Role-Users Visualization:

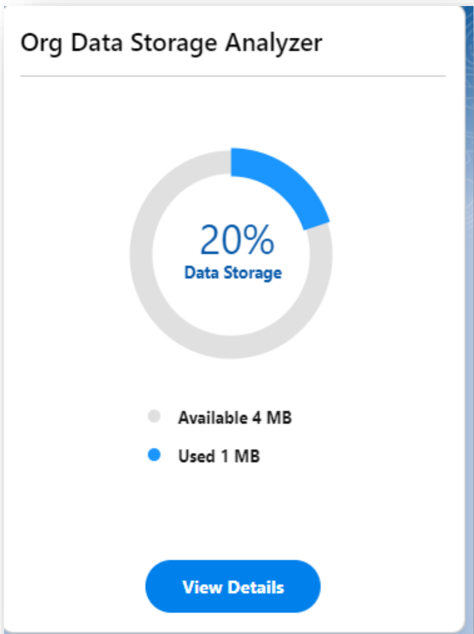
- Here, administrators can visualize the role hierarchy within the organization and the distribution of users across different roles. Graphical representations, such as tree diagrams or hierarchical charts, provide a clear overview of the organizational structure and the relationships between roles and users. This visualization aids administrators in understanding access permissions, role assignments, and overall user management within the organization.

Overall, the Home Tab serves as a comprehensive dashboard, consolidating essential metrics and visualizations to empower administrators in monitoring and optimizing their Salesforce organization effectively. By providing actionable insights into data storage, profile usage, license assignments, code coverage, and more, the Home Tab facilitates informed decision-making and proactive management of the Salesforce environment.

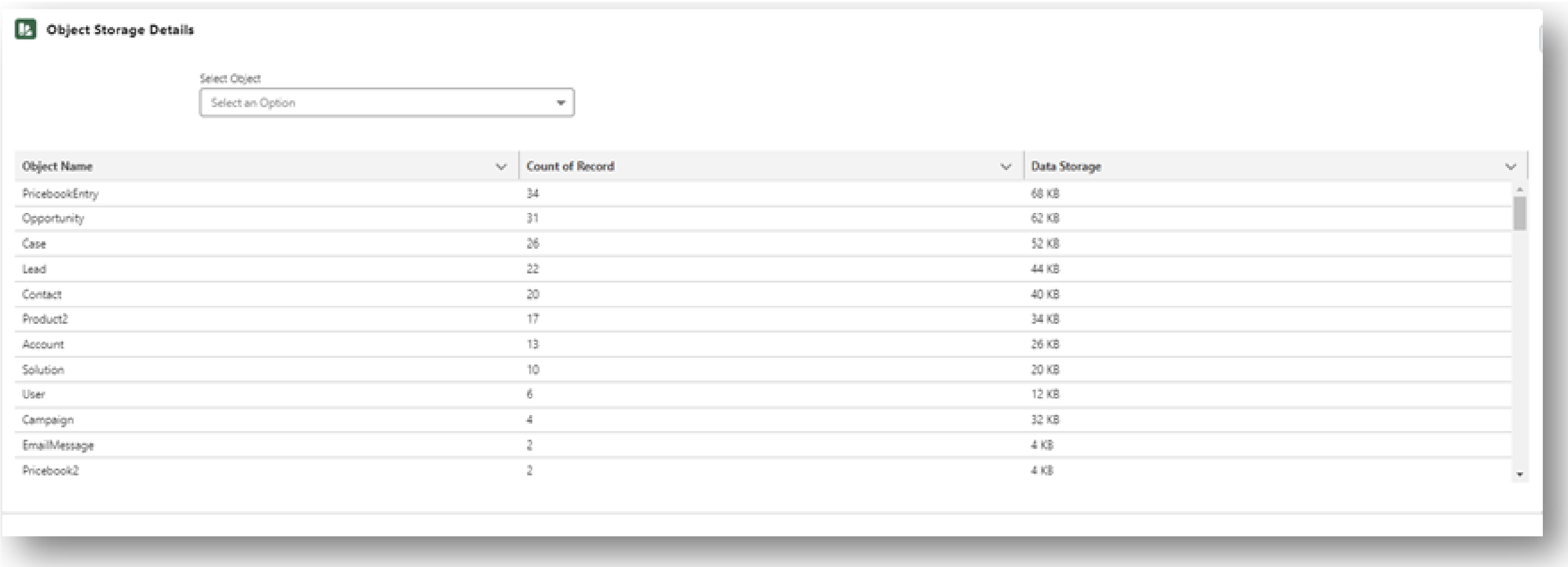
Data Storage Visualization Tab

After clicking on the view details button from the Org Data Storage Analyzer you are navigating to the Data Storage Visualization Tab (Page).

The **Data Storage Visualization Tab** within the Salesforce Org Health Check App provides administrators with insights into the data storage usage of various objects within their organization. This tab presents a comprehensive list of objects, along with their respective record count and data storage usage. Additionally, administrators can view the storage usage of individual objects in graphical format by selecting an object from the dropdown menu.



That page contains the list of objects, and their records count and Data Storage size



Object Storage Details

Select Object

Select an Option

Object Name	Count of Record	Data Storage
PricebookEntry	34	68 KB
Opportunity	31	62 KB
Case	26	52 KB
Lead	22	44 KB
Contact	20	40 KB
Product2	17	34 KB
Account	13	26 KB
Solution	10	20 KB
User	6	12 KB
Campaign	4	32 KB
EmailMessage	2	4 KB
Pricebook2	2	4 KB

Here's a detailed breakdown of the features available on this tab:

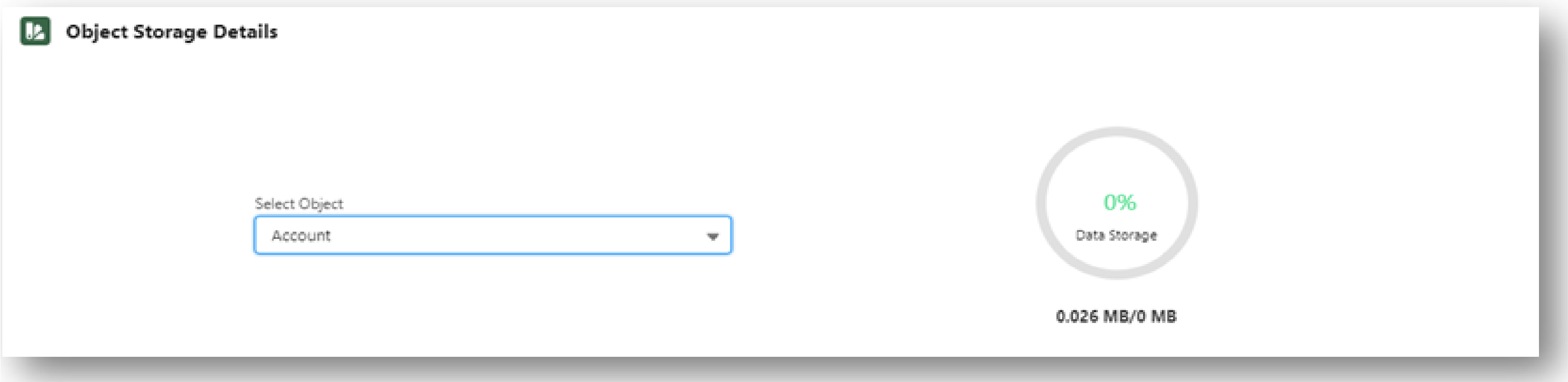
List of Objects: The tab displays a list of objects present within the Salesforce organization, including:

- **Object Name**: This column lists the names of objects within the organization. Each row corresponds to a specific object, allowing administrators to easily identify and locate individual objects.
- **Records Count:** The records count column displays the number of records stored for each object. This information provides administrators with insights into the volume of data stored for each object and helps identify objects with high record counts.
- **Data Storage:** The data storage column indicates the amount of storage space consumed by each object's data. Administrators can use this information to assess the storage usage of individual objects and identify areas for optimization.

Graphical Format for Single Object Storage:

Administrators have the option to view the storage usage of individual objects in graphical format by selecting an object from the dropdown menu. The graphical visualization typically includes:

- **Object Name**: The selected object's name is displayed prominently in the graph, allowing administrators to easily identify the object being analyzed.
- **Storage Usage:** The graph illustrates the storage usage of the selected object, providing administrators with a visual representation of the amount of storage space consumed by the object's data.



Utilization of Table Information:

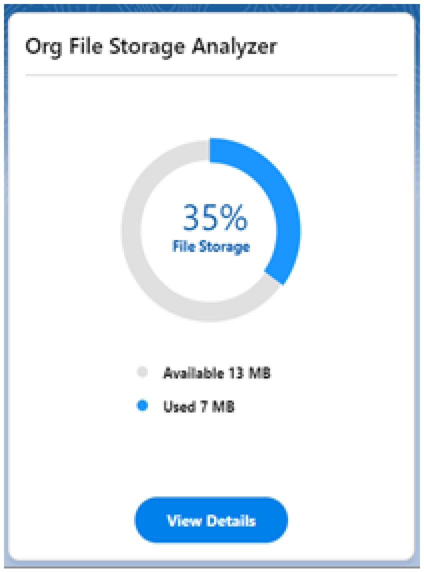
- **Storage Optimization**: Use the table to identify objects with high record counts and significant storage usage. By reviewing the records count and data storage columns, administrators can prioritize efforts to optimize storage consumption for specific objects.
- **Data Management**: The table enables us to assess the volume of data stored for each object and make informed decisions regarding data management strategies. Administrators can identify objects with excessive data storage usage and implement strategies to reduce storage consumption where necessary.
- **Graphical Analysis**: By selecting an object from the dropdown menu and viewing its storage usage in graphical format, administrators can gain deeper insights into the distribution of data storage within the organization. Graphical visualizations provide a clear overview of storage usage trends and help identify outliers or areas for further investigation.

Overall, the Data Storage Visualization Tab empowers administrators to effectively manage data storage usage.
By leveraging the table information and graphical analysis capabilities, administrators can optimize storage consumption, implement data management strategies, and ensure efficient utilization of storage resources.

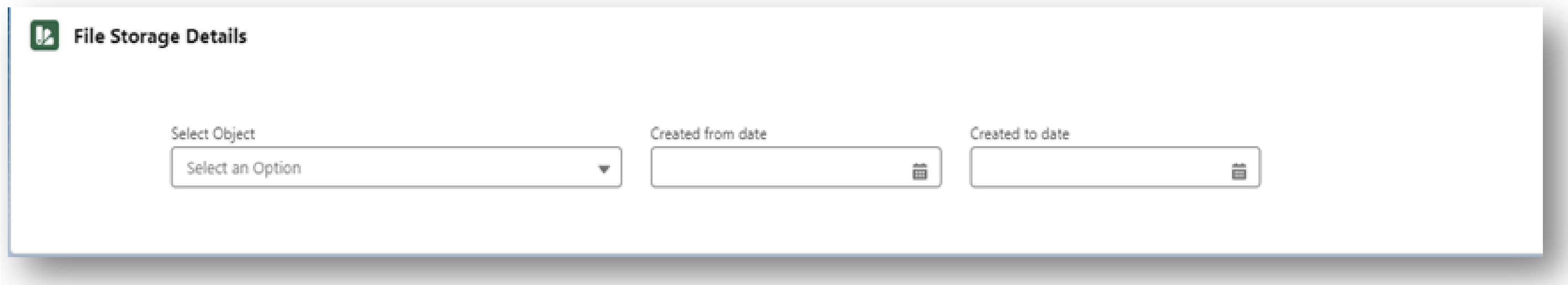
File Storage Visualization Tab

After clicking on the view details button from the File Data Storage Analyzer you are navigating to the File Storage Visualization Tab (Page).

The **File Storage Visualization Tab** within the Salesforce Org Health Check App offers administrators insights into the usage and distribution of file storage within their organization. This tab presents graphical visualizations of file storage, including Files, Attachments, and Notes, and allows administrators to filter the data by date.



Here's a detailed breakdown of the features available on this tab:



Graphical Format of File Storage:
The tab displays graphical representations of file storage usage, typically including:

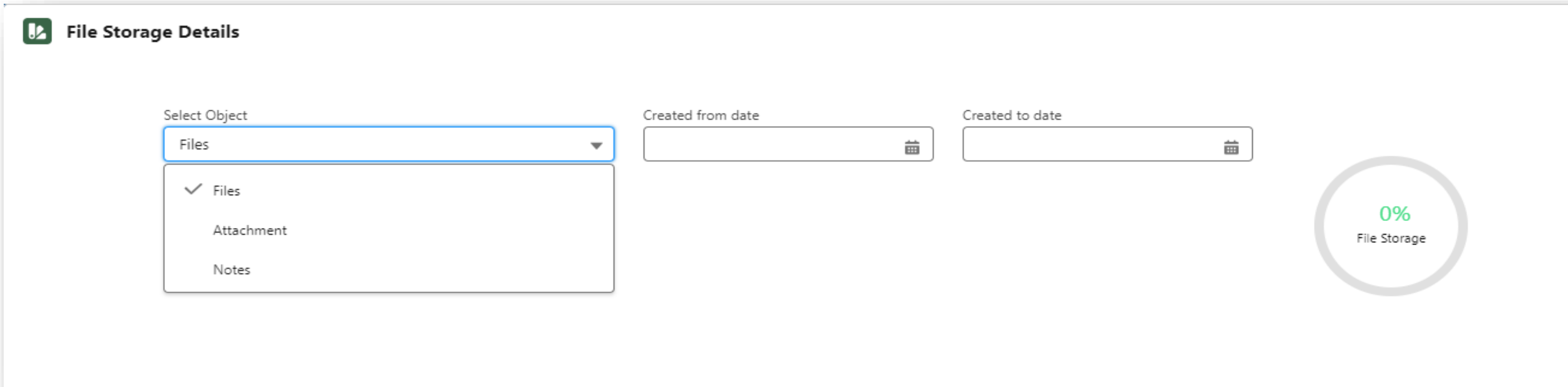
- **Files Storage**: This section presents the usage of storage dedicated to Files uploaded within the organization. Administrators can visualize the distribution of file storage consumption and track trends over time.
- **Attachments Storage**: The visualizations depict the usage of storage allocated for Attachments associated with records in the organization. This allows administrators to understand the impact of Attachments on overall storage usage.
- **Notes Storage**: Administrators can also view the storage usage for Notes created within the organization. Visualizations provide insights into the volume of Notes stored and their contribution to overall storage consumption.
  Filtering by Date:
  Administrators can filter the data displayed on the tab by date. This functionality allows users to focus on specific periods and analyze storage trends over time. By selecting a date range, administrators can customize the visualizations to meet their specific analysis needs.

Utilization of Graphical Format:

- **Storage Optimization**: Administrators can use visualizations to identify areas of high storage usage and prioritize efforts to optimize storage consumption. By understanding the distribution of file storage across different types of files (Files, Attachments, Notes), administrators can implement strategies to reduce storage usage where necessary.
- **Trend Analysis:** By tracking storage usage trends over time, administrators can identify patterns and anticipate future storage needs. This allows for proactive management of storage resources and ensures that the organization maintains sufficient storage capacity to support its operations.

- **Data-driven Decision Making**: The visualizations empower administrators to make informed decisions regarding storage allocation and usage policies. By visually representing storage data, administrators can communicate storage-related insights to stakeholders and drive organizational initiatives aimed at optimizing storage efficiency.

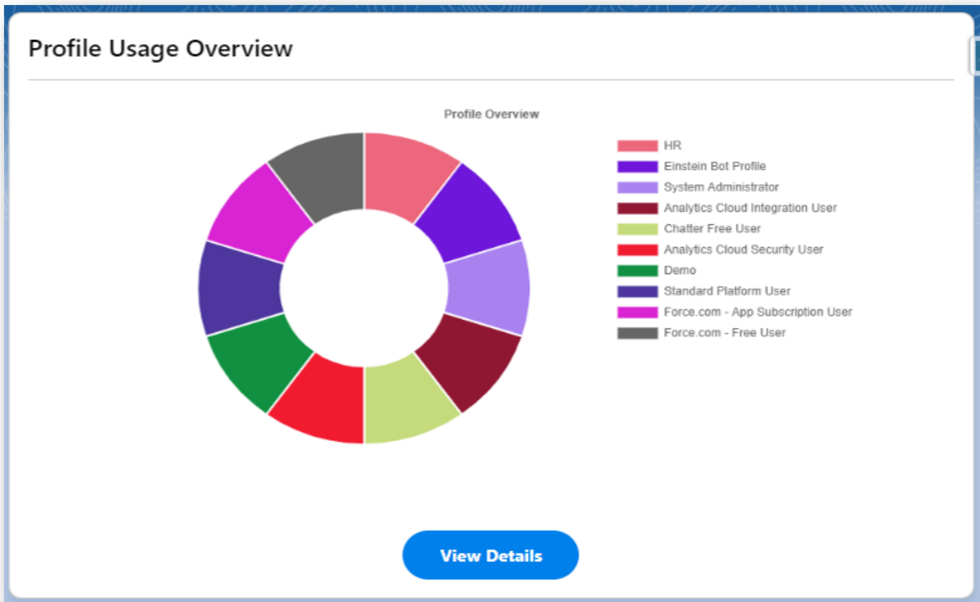
Overall, the "File Storage Visualization Tab" provides administrators with valuable insights into the usage and distribution of file storage within their Salesforce organization. By leveraging graphical visualizations and filtering capabilities, administrators can analyze storage trends, identify areas for optimization, and make data-driven decisions to ensure efficient storage management.



Profile Users Analysis Tab

After clicking on the View Details button from Profile Usage Overview you are navigating to the Profile Users Analysis Tab (Page).

The **Profile Users Analysis Tab** within the Salesforce Org Health Check App offers administrators insights into user assignments and activity associated with each profile within their organization. This tab provides a comprehensive list of profiles, along with the usernames, user emails, and user activation status for users assigned to each profile.



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Here's a detailed breakdown of the features available on this tab:

List of Profiles:

The tab presents a comprehensive list of profiles available within the organization, including details such as:

- **Profile Name**: This column lists the names of profiles within the organization. Each row corresponds to a specific profile, allowing administrators to easily identify and locate individual profiles.
- **Username:** The username column displays the names of users assigned to each profile. Administrators can review the list of users associated with each profile and ensure that user assignments align with organizational requirements and permissions.
- **User Email**: The user email column indicates the email addresses of users assigned to each profile. This information helps administrators identify and contact users associated with specific profiles, if necessary.
- **User Activation Status:** The user activation status column specifies whether each user assigned to a profile is active or inactive. Administrators can use this information to monitor user activity and ensure that user accounts are appropriately managed and maintained.

Utilization of Table Information:

- **Profile Management:** Administrators can use the table to manage profile assignments effectively by reviewing information such as profile names, usernames, user emails, and user activation statuses. This enables administrators to make informed decisions regarding profile assignments, permissions, and user access.
- **User-Profile Relationships**: By reviewing the list of users assigned to each profile, administrators can ensure that profiles are appropriately assigned based on user roles and responsibilities. This helps optimize profile usage and ensure compliance with organizational requirements.
- **User Activation Monitoring:** Administrators can monitor user activation statuses to ensure that user accounts are appropriately managed and maintained. This helps mitigate security risks associated with inactive user accounts and ensures that only authorized users have access to the Salesforce organization.

Overall, the "Profile Users Analysis Tab" provides administrators with valuable insights into user assignments and activity associated with each profile within their Salesforce organization. By leveraging the table information, administrators can effectively manage profile assignments, monitor user activity, and ensure alignment with organizational requirements and permissions.

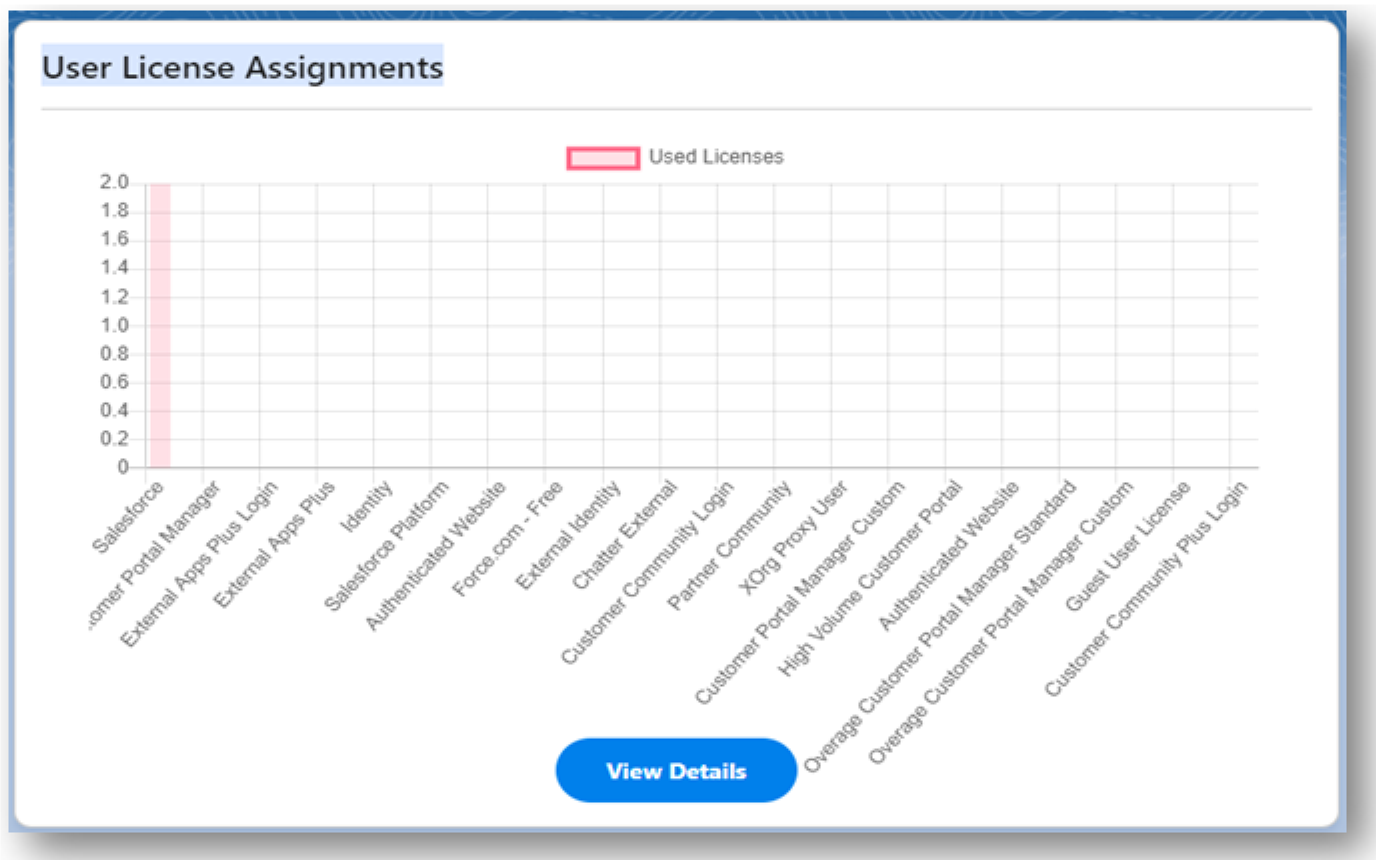
Profile User Details

	Profile Name	User Name	User Email	User Status
1	› Service Cloud			
2	› Customer Portal Manager			
3	⌄ System Administrator			
4		[redacted]	[redacted]	✓
5		[redacted]	[redacted]	✓
6	› External Apps Plus Login User			
7	› External Apps User			
8	› External Apps Plus User			
9	› External Apps Login User			
10	› Identity User			
11	› Salesforce API Only System Integrations			
12	› Minimum Access - Salesforce			
13	› Standard Platform User			
14	› Partner User			

User License Analysis Tab

After clicking on the View Details button from User License Assignments you are navigating to User License Analysis Tab (Page).

The **User License Analysis Tab** within the Salesforce Org Health Check App offers administrators insights into the allocation and utilization of user licenses within their organization. This tab provides a list of licenses, their total count, and use count, and allows administrators to view which users are assigned each license.



Here's a detailed breakdown of the features available on this tab:

List of Licenses:
The tab presents a comprehensive list of licenses available within the organization, including details such as:
- **License Name:** This column lists the names of user licenses available in the organization. Each row corresponds to a specific license, allowing administrators to easily identify and locate individual licenses.
- **Total Count:** The total count column displays the total number of licenses available for each license type. This information helps administrators assess the overall availability of licenses and identify any potential shortages or excesses in license allocation.
- **Use Count:** The use count column indicates the number of licenses currently in use for each license type. Administrators can use this information to track license utilization rates and identify any licenses that may be underutilized or overutilized.

User-License Assignments:
In addition to license details, the tab provides insights into user-license assignments, allowing administrators to view which users are assigned each license. This functionality typically includes:
- **User-Role Relationships:** Administrators can view a list of users assigned to each license type, providing insights into user-license relationships, and ensuring that licenses are appropriately assigned based on user roles and responsibilities.

Utilization of Table Information:
- **License Management:** Administrators can use the table to manage user licenses effectively by reviewing information such as license names, total counts, use counts, and user assignments. This enables administrators to make informed decisions regarding license allocation, optimization, and compliance.
- **License Utilization Monitoring:** By comparing total license counts with use counts, administrators can assess license utilization rates and identify any licenses that may be underutilized or overutilized. This allows for proactive management of license allocation and optimization of license usage efficiency.
- **User-License Relationships:** By reviewing the list of users assigned to each license type, administrators can ensure that licenses are appropriately assigned based on user roles and responsibilities. This helps optimize license usage and ensure compliance with licensing agreements.

  Overall, the "User License Analysis Tab" provides administrators with valuable insights into the allocation and utilization of user licenses within their Salesforce organization. By leveraging the table information, administrators can effectively manage license allocation, monitor license utilization rates, and ensure alignment with organizational requirements and user roles.

User License Details

	License Name	Total Licenses	Used Licenses
1	Salesforce	20	2
2	Service Cloud	20	0
3	Customer Portal Manager	0	0
4	Cloud Integration User	1	0
5	External Apps Plus Login	20	0
6	External Apps	1	0
7	External Apps Plus	1	0
8	External Apps Login	40	0
9	Identity	10	0
10	Salesforce Integration	1	0
11	Salesforce Platform	20	0

User License Details

	License Name	Total Licenses	Used Licenses
1	Salesforce	20	2
2	Service Cloud		
3	Customer Port		
4	Cloud Integrati		
5	External Apps		
6	External Apps		
7	External Apps		
8	External Apps Login	40	0
9	Identity	10	0
10	Salesforce Integration	1	0
11	Salesforce Platform	20	0

Salesforce Users

	First Name	Last Name	User Name	Status
1	[redacted]	[redacted]	[redacted]	true
2	[redacted]	[redacted]	[redacted]	true

Cancel

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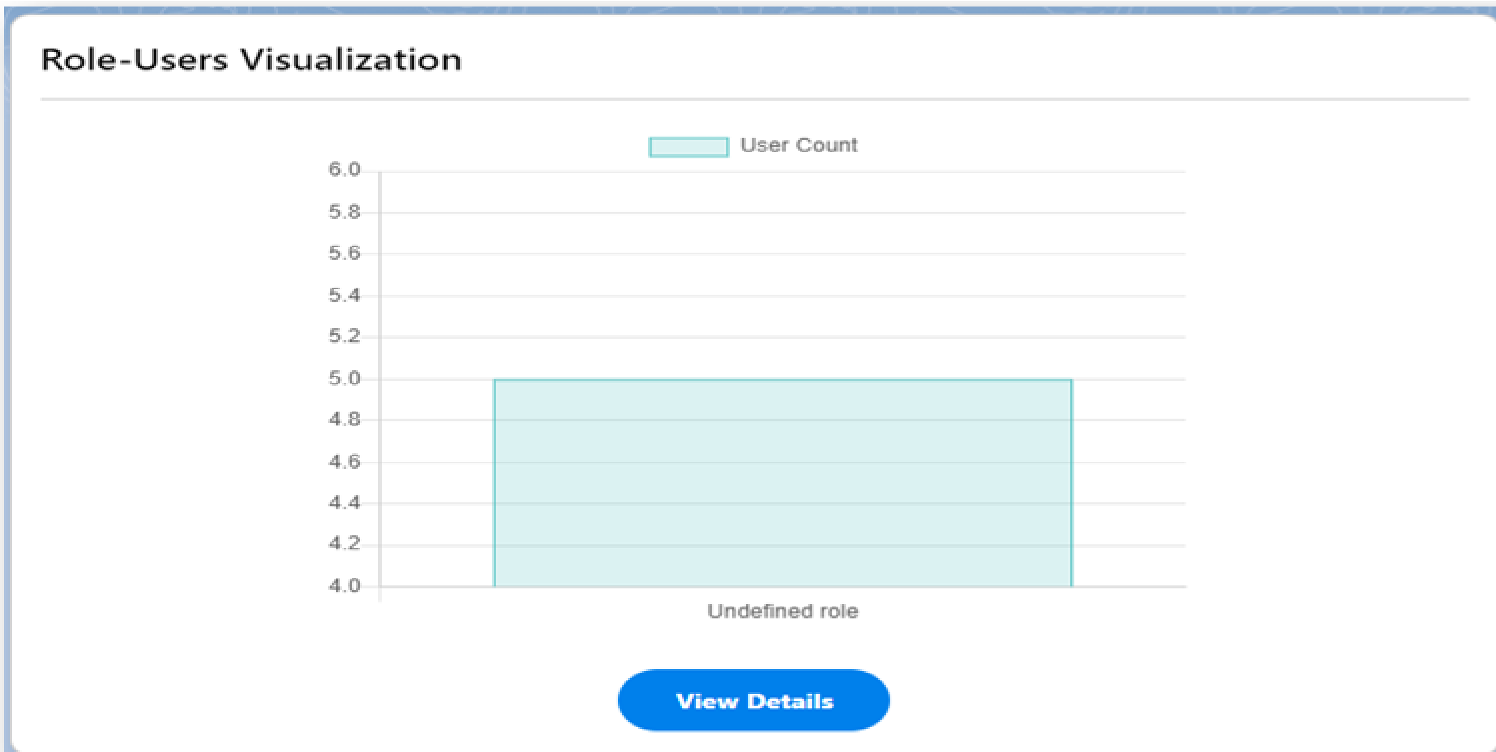
Org Role Hierarchy Visualization Tab

After clicking on the View Details button from Role-Users Visualization you are navigating to the Org Role Hierarchy Visualization Tab (Page).

The **Org Role Hierarchy Visualization** tab within the Salesforce Org Health Check App offers administrators a graphical representation of the organizational role hierarchy. In addition to visualizing the hierarchy, this tab provides a list of all roles and users assigned to each role. Furthermore, administrators can manage user roles directly from this page.



Here's a detailed breakdown of the features available on this tab:

Role Hierarchy Visualization:
The graphical representation of the organizational role hierarchy provides administrators with a visual understanding of the hierarchical structure within the Salesforce organization.
This visualization typically includes:

- **Hierarchy Tree:** A hierarchical tree diagram illustrating the relationships between different roles within the organization. Administrators can easily visualize the parent-child relationships between roles, facilitating an understanding of the organizational structure.
- **Role Nodes:** Each role is represented by a node in the hierarchy tree, with lines connecting parent roles to their respective child roles. This allows administrators to identify the position of each role within the hierarchy and its relationship to other roles.

List of Roles and Assigned Users:
In addition to the visual hierarchy, the tab presents a list of all roles within the organization along with the users assigned to each role. The table typically includes the following information:

- **Role Name:** This column lists the names of roles within the organization. Each row corresponds to a specific role, allowing administrators to easily identify and locate individual roles.
- **Assigned Users:** The table displays the users assigned to each role, providing administrators with insights into role assignments and user-role relationships. Administrators can review the list of assigned users for each role and manage role assignments as needed.

Role Management:
Administrators can manage user roles directly from this page, allowing for seamless role assignment and adjustment. Key functionalities may include:

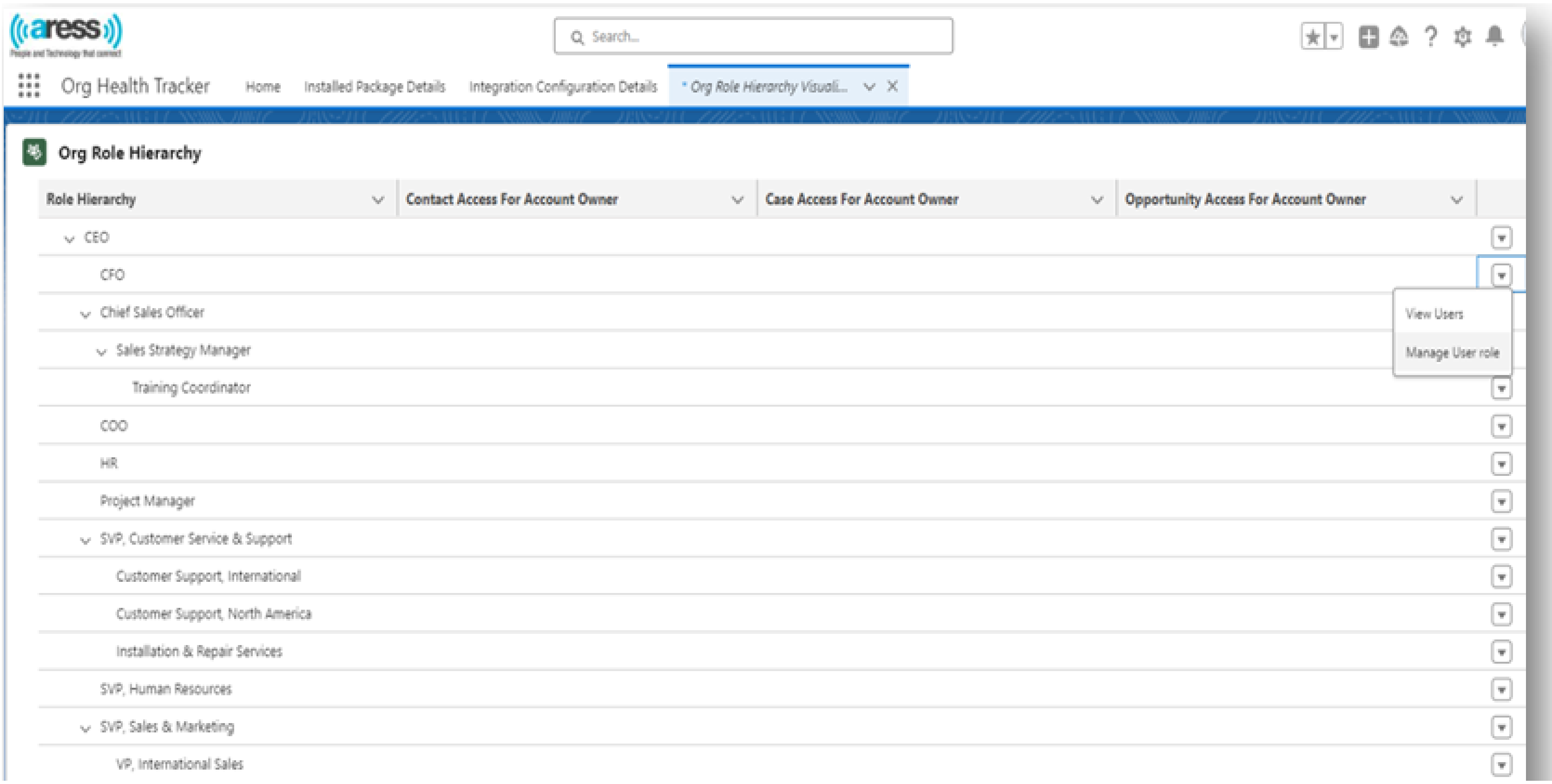
- **Role Assignment:** Administrators can assign users to roles directly from the tab, simplifying the process of managing user roles within the organization.
- **Role Modification:** Additionally, administrators may have the ability to modify existing role assignments, such as reassigning users to different roles or adjusting role hierarchies as needed.

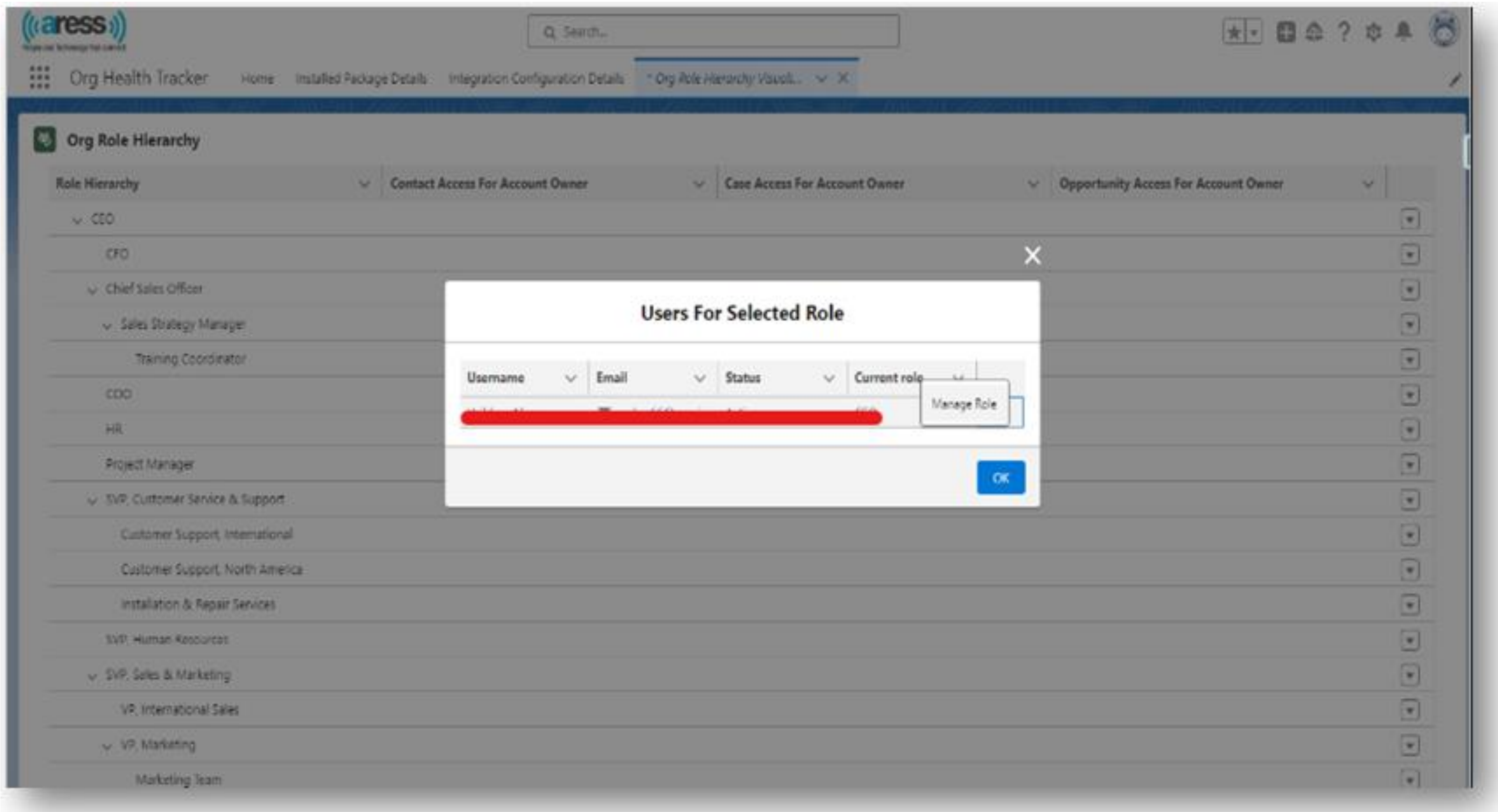
Utilization of Table Information:

- **Role Assignment Management:** Administrators can use the table to manage role assignments effectively by reviewing information such as role names and assigned users. This enables administrators to make informed decisions regarding role assignments and adjustments within the organization.

- **User-Role Relationships:** By reviewing the list of assigned users for each role, administrators can gain insights into user-role relationships and ensure that users are assigned appropriate roles based on their responsibilities and permissions.

Overall, the "Org Role Hierarchy Visualization" tab provides administrators with valuable insights into the organizational role hierarchy and user-role relationships within the Salesforce organization. By leveraging the visual hierarchy and table information, administrators can effectively manage role assignments, optimize role hierarchies, and ensure alignment with organizational requirements and structures.




Org Health Tracker
Home
Installed Package Details
Integration Configuration Details
Org Role Hierarchy
Role Hierarchy
Contact Access For Account Owner
Case Access For Account Owner
Opportunity Access For Account Owner
CEO
CFO
Chief Sales Officer
Sales Strategy Manager
Training Coordinator
COO
HR
Project Manager
SVP, Customer Service & Support
Customer Support, International
Customer Support, North America
Installation & Repair Services
SVP, Human Resources
SVP, Sales & Marketing
VP, International Sales
VP, Marketing
Marketing Team
Users For Selected Role
Username
Email
Status
Current role
Manage Role
OK

Static Resource Usage

After clicking on the View Details button from Static Resource Usage you are navigating to Static Resource Usage Details (Page).

The **Static Resource Usage Tab** offers insights into the static resources present in their Salesforce organization. This tab provides a detailed view of static resources, including their content type, body length, created date, and the ability to filter resources based on content type.

Here's a breakdown of the components available on the Static Resource Usage Tab:

Table Displaying Static Resources Information:
The table presents a comprehensive overview of static resources within the Salesforce organization, displaying relevant information for each resource. Here's a description of the table columns and their significance:

Static Resource Name:

- This column lists the names of static resources present in the organization. Each row corresponds to a specific static resource, allowing administrators to easily identify and locate individual resources.

Content-Type:

- The content type column indicates the type of content stored in each static resource. Content types may include text files, images, JavaScript files, CSS files, or other types of resources. Administrators can use this information to categorize and manage static resources effectively.

Body Length:

- The body length column displays the size of each static resource's body in bytes. This information helps administrators assess the storage space consumed by each resource and identify any resources that may be particularly large or resource intensive.

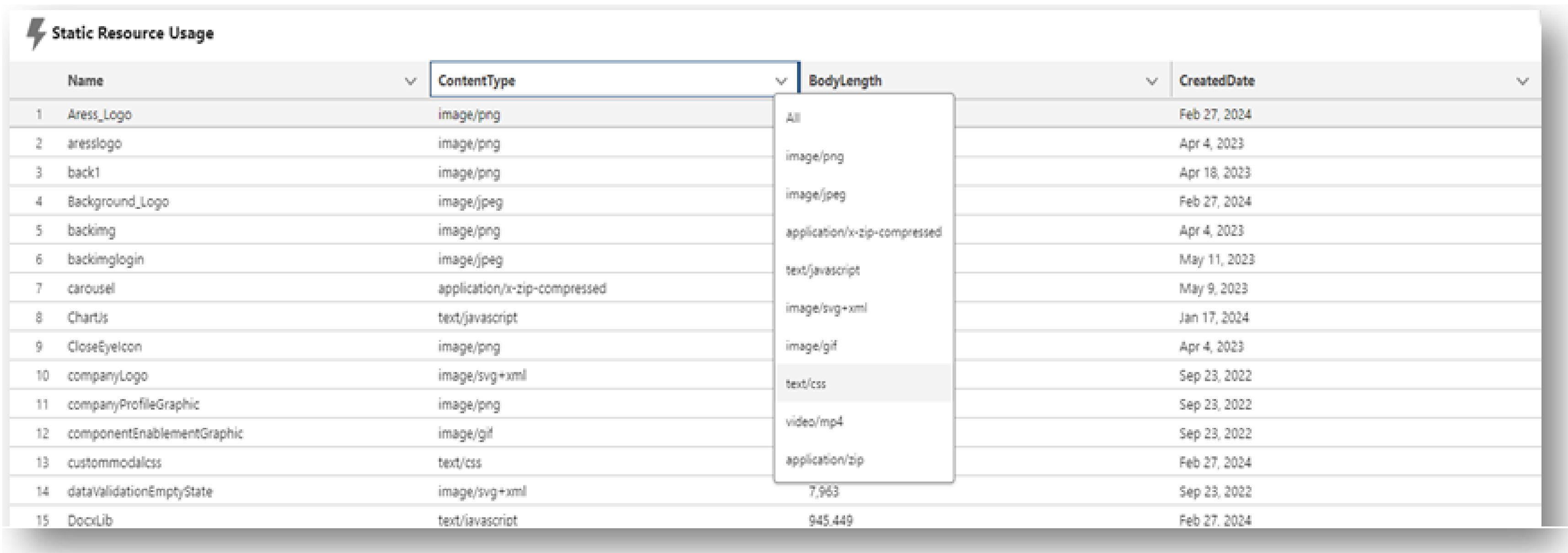
Created Date:

- The created date column indicates the date when each static resource was created in the Salesforce organization. Administrators can use this information to track the creation timeline of resources and assess their age or relevance.

Filtering Static Resources by Content-Type:
Administrators have the option to filter static resources based on their content type, allowing for targeted analysis and management of specific types of resources. By selecting a content type from the available filter options, administrators can narrow down the list of displayed resources to only those of the selected type. This feature enhances usability and enables administrators to focus on specific categories of static resources as needed.

Utilization of Table Information:

- **Resource Management:** Administrators can use the table to manage static resources effectively by reviewing information such as content type, body length, and creation date. This allows for informed decision-making regarding resource usage, optimization, and cleanup.
- **Storage Optimization:** By analyzing the body length of static resources, administrators can identify and address resource-intensive files that may be contributing to excessive storage consumption. This enables proactive management of storage usage and optimization of resource storage efficiency.
- **Content Categorization:** The content type column facilitates the categorization and organization of static resources based on their type. Administrators can use this information to classify resources, streamline resource management workflows, and ensure consistency in resource usage practices.


Static Resource Usage

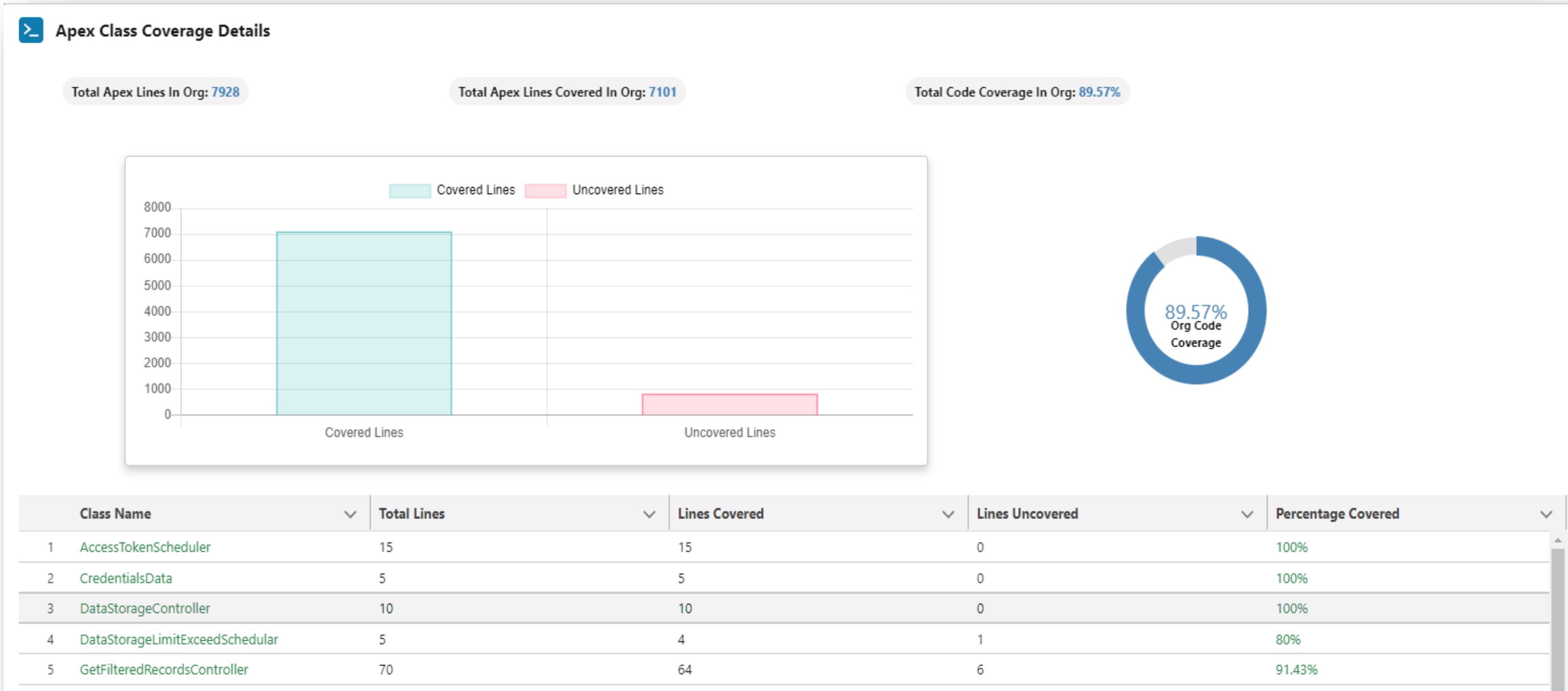
	Name	ContentType	BodyLength	CreatedDate
1	Aress_Logo	image/png		Feb 27, 2024
2	aresslogo	image/png		Apr 4, 2023
3	back1	image/png		Apr 18, 2023
4	Background_Logo	image/jpeg		Feb 27, 2024
5	backimg	image/png		Apr 4, 2023
6	backimglogin	image/jpeg		May 11, 2023
7	carousel	application/x-zip-compressed		May 9, 2023
8	ChartJs	text/javascript		Jan 17, 2024
9	CloseEyeIcon	image/png		Apr 4, 2023
10	companyLogo	image/svg+xml		Sep 23, 2022
11	companyProfileGraphic	image/png		Sep 23, 2022
12	componentEnablementGraphic	image/gif		Sep 23, 2022
13	custommodalcss	text/css		Feb 27, 2024
14	dataValidationEmptyState	image/svg+xml	7,963	Sep 23, 2022
15	DocxLib	text/javascript	945,449	Feb 27, 2024

Overall, the "Static Resource Usage Tab" provides administrators with valuable insights into the static resources present in their Salesforce organization. By leveraging the table information and filtering capabilities, administrators can effectively manage resources, optimize storage usage, and ensure the efficient utilization of static resource assets within the organization.

Apex Class Coverage Details

After clicking on the View Details button from Apex Coverage Visualization you are navigating to Apex Coverage Visualization Tab (Page).

Apex Class Coverage Tab offers insights into the test class coverage of Apex code within their organization. This tab features both graphical representations and a detailed table to provide a comprehensive overview of Apex class coverage metrics.



Here's a breakdown of the components available on the Apex Class Coverage Tab:

Graphical Format of Apex Test Class Coverage:
The graphical format presents an intuitive visualization of the test class coverage for Apex code within the Salesforce organization. This visualization may include charts or graphs that depict:

- **Percentage of Code Covered:** Administrators can visually assess the percentage of Apex code covered by test classes. This provides a quick understanding of the overall test coverage and helps identify areas with insufficient test coverage.
- **Coverage Trends Over Time:** Graphs may also display coverage trends over time, allowing administrators to track changes in test coverage and assess the effectiveness of efforts to improve code coverage.

Table Displaying Apex Classes Coverage:
The table provides a detailed breakdown of Apex classes, including information on covered and uncovered lines, as well as the total percentage of test class coverage. Here's a description of the table columns and their significance:

Apex Class Name:

- This column lists the names of Apex classes within the Salesforce organization. Each row corresponds to a specific Apex class, allowing administrators to easily identify and locate individual classes.

Covered Lines:

- The covered lines column displays the number of lines of code covered by test classes for each Apex class. This information helps administrators assess the extent of test coverage for each class and identify classes with comprehensive test coverage.

Uncovered Lines:

- Conversely, the uncovered lines column indicates the number of lines of code that are not covered by test classes for each Apex class. Administrators can use this information to identify classes with insufficient test coverage and prioritize efforts to improve coverage for these classes.

Total Percentage of Test Class Coverage:

- This column presents the total percentage of test class coverage for each Apex class, calculated based on the ratio of covered lines to total lines of code. Administrators can gauge the overall test coverage for each class and identify classes that may require additional testing efforts.

Utilization of Table Information:

- **Identifying Coverage Discrepancies:** Administrators can use the table to identify Apex classes with discrepancies in test class coverage, such as classes with a high number of uncovered lines or low overall coverage percentages.

* **Prioritizing Testing Efforts**: By reviewing the coverage metrics for individual Apex classes, administrators can prioritize testing efforts and focus on improving coverage for classes with lower coverage percentages or significant numbers of uncovered lines.
* **Monitoring Coverage Trends:** Administrators can track coverage trends over time by comparing coverage metrics across different periods. This enables them to assess the effectiveness of efforts to improve test coverage and identify areas for further improvement.

Overall, the "Apex Class Coverage Tab" provides administrators with valuable insights into the test class coverage of Apex code within their Salesforce organization. By leveraging the graphical format and detailed table information, administrators can assess coverage metrics, prioritize testing efforts, and drive continuous improvement in code quality and reliability.

Installed Package Details Tab

Within the Salesforce Org Health Tracker App, the **Installed Package Details** tab offers administrators valuable insights into the packages installed in their Salesforce instance. This tab presents a comprehensive table, allowing administrators to easily access key information about each installed package.

Installed Package Details

	Package Name	Version Number	Installation Date	Used Licenses	Available Licenses	Namespace Prefix
1	Recruiting App Package	1.0				
2	Contacts Today	1.3				
3	Contacts Today	0.1				
4	Opportunity Alert	0.1				
5	Process Automation Specialist Email Te...	1.2				
6	AppX Dashboard Pak	0.0				
7	ApexSpecialistSuperbadgePackage	0.2				
8	Salesforce Connected Apps	1.7	2020/12/29, 11:46:47 AM	0	1	sf_com_apps
9	Data Fetcher	1.4	2023/09/22, 12:36:15 PM	0	1	joshdaymentlabs
10	SF Org Health Tracker	1.1	2024/03/15, 2:26:11 PM	0	1	sfhc

Here's a breakdown of the table columns and their significance:

Table Columns:

- **Package Name:** This column lists the names of the packages installed in the Salesforce organization. Each row corresponds to a specific package, providing administrators with a clear overview of the packages deployed within the environment.
- **Version Number:** The version number column displays the version of each installed package. This information is crucial for tracking the version history of packages and identifying any updates or changes made to them over time.
- **Installation Date:** The installation date column indicates the date when each package was installed in the Salesforce organization. Administrators can refer to this information to track the installation timeline of packages and understand their deployment history.

- **Used Licenses:** This column shows the number of licenses currently in use for each installed package. It provides administrators with insights into license utilization, allowing them to monitor the license consumption and ensure compliance with licensing agreements.
- **Available Licenses:** The available licenses column displays the remaining number of licenses available for each installed package. Administrators can use this information to assess license availability, allocate licenses efficiently, and avoid potential license shortages.
- **Namespace Prefix:** The namespace prefix column presents the namespace prefix associated with each installed package, if applicable. Namespace prefixes are unique identifiers used to distinguish components within managed packages. This information helps administrators identify the origin and ownership of installed packages, particularly for managed packages developed by third-party vendors.

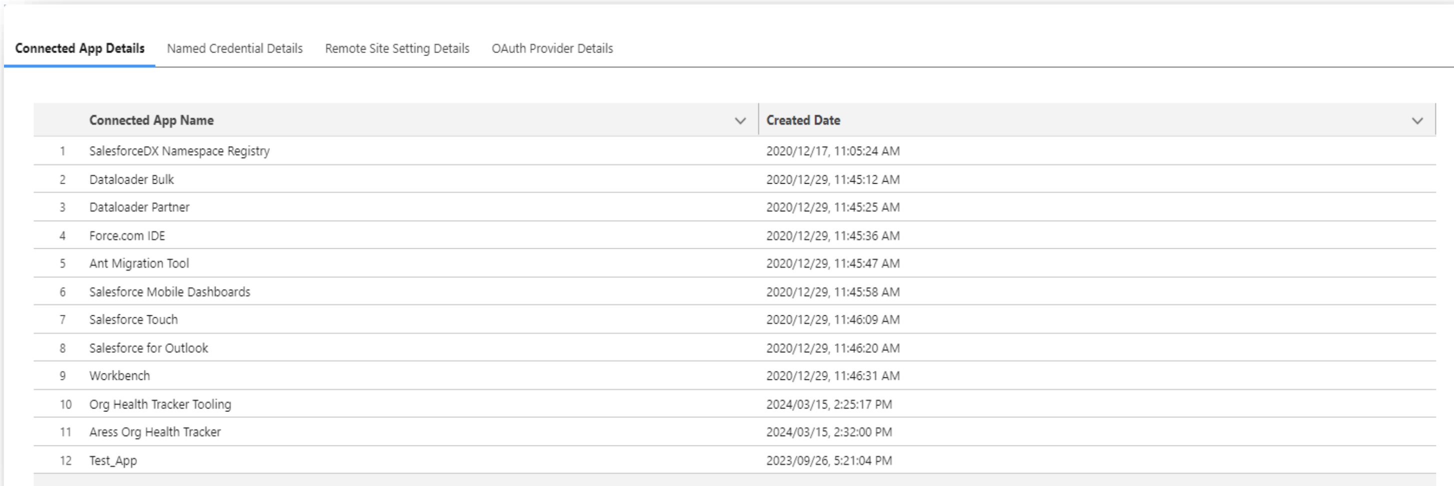
Utilization of Table Information:

- **Tracking Package Deployment:** Administrators can utilize the table to track the deployment of packages within the Salesforce organization, including the installation date and version history of each package.
- **License Management:** By monitoring the used and available licenses for each package, administrators can effectively manage license allocation, ensure compliance with licensing agreements, and avoid license shortages.
- **Version Control:** The version number column enables administrators to track the version history of installed packages, facilitating version control and ensuring that the latest versions are deployed.
- **Namespace Identification:** The namespace prefix column allows administrators to identify the origin and ownership of installed packages, particularly for managed packages developed by third-party vendors. This information aids in troubleshooting, support, and collaboration with package developers.

Overall, the "Installed Package Details" tab provides administrators with valuable insights into the packages installed in their Salesforce organization, facilitating effective package management, license allocation, and version control. By leveraging the information presented in the table, administrators can make informed decisions regarding package deployment, licensing, and maintenance within the Salesforce environment.

Integration Configuration Details Tab

The **Integration Configuration Details Tab** within the Salesforce Org Health Check App provides administrators with insights into the configuration of various integrations within their organization. This tab consists of four tabs: Connected App Details, Named Credentials Details, Remote Site Setting Details, and OAuth Provider Details. Each tab presents a list of respective integration configurations along with relevant details.



Connected App Details | Named Credential Details | Remote Site Setting Details | OAuth Provider Details

	Connected App Name	Created Date
1	SalesforceDX Namespace Registry	2020/12/17, 11:05:24 AM
2	Dataloader Bulk	2020/12/29, 11:45:12 AM
3	Dataloader Partner	2020/12/29, 11:45:25 AM
4	Force.com IDE	2020/12/29, 11:45:36 AM
5	Ant Migration Tool	2020/12/29, 11:45:47 AM
6	Salesforce Mobile Dashboards	2020/12/29, 11:45:58 AM
7	Salesforce Touch	2020/12/29, 11:46:09 AM
8	Salesforce for Outlook	2020/12/29, 11:46:20 AM
9	Workbench	2020/12/29, 11:46:31 AM
10	Org Health Tracker Tooling	2024/03/15, 2:25:17 PM
11	Aress Org Health Tracker	2024/03/15, 2:32:00 PM
12	Test_App	2023/09/26, 5:21:04 PM

Here's a breakdown of the features available on each tab:

Connected App Details Tab:
The Connected App Details tab presents a list of connected apps present in the organization. The table includes the following columns:

- **Connected App Name:** This column lists the names of connected apps within the organization. Each row corresponds to a specific connected app, allowing administrators to easily identify and locate individual apps.
  Created Date: The created date column indicates the date when each connected app was created in the Salesforce organization. This information helps administrators track the creation timeline of connected apps.

Named Credentials Details Tab:

The Named Credentials Details tab displays a list of named credentials present in the organization. The table includes the following columns:

- **Named Credential Name:** This column lists the names of named credentials within the organization. Each row corresponds to a specific named credential, allowing administrators to easily identify and locate individual credentials.
- **Created Date:** The created date column indicates the date when each named credential was created in the Salesforce organization. This information helps administrators track the creation timeline of named credentials.

Remote Site Setting Details Tab:

The Remote Site Setting Details tab presents a list of remote site settings present in the organization. The table includes the following columns:

- **Remote Site Setting Name:** This column lists the names of remote site settings within the organization. Each row corresponds to a specific remote site setting, allowing administrators to easily identify and locate individual settings.
  Created Date: The created date column indicates the date when each remote site setting was created in the Salesforce organization. This information helps administrators track the creation timeline of remote site settings.

Connected App Details | Named Credential Details | **Remote Site Setting Details** | OAuth Provider Details

	Site Name	Endpoint URL	isActive
1	Animal	https://th-apex-http-callout.herokuapp.com	true
2	ApexSpecialist	https://th-superbadge-apex.herokuapp.com	true
3	ApexDevNet	http://www.apexdevnet.com	true
4	chatGPTURL	https://api.openai.com	true

OAuth Provider Details Tab

The **OAuth Provider Details Tab** displays a list of OAuth providers present in the organization.

The table includes the following columns:

- **OAuth Provider Name:** This column lists the names of OAuth providers within the organization. Each row corresponds to a specific OAuth provider, allowing administrators to easily identify and locate individual providers.
- **Created Date:** The created date column indicates the date when each OAuth provider was created in the Salesforce organization. This information helps administrators track the creation timeline of OAuth providers.

Utilization of Table Information:

- **Integration Management:** Administrators can use the tables to manage integration configurations effectively by reviewing information such as integration names and creation dates. This enables administrators to make informed decisions regarding integration setup, maintenance, and optimization.
- **Configuration Tracking:** By tracking the creation dates of integration configurations, administrators can monitor the evolution of integrations within the organization and ensure that configurations align with organizational requirements and best practices.
  Audit and Compliance: The tables provide a record of integration configurations, facilitating audit and compliance efforts. Administrators can use this information to ensure that integrations are properly configured and compliant with organizational policies and regulatory requirements.

Overall, the "Integration Configuration Details Tab" empowers administrators to effectively manage integration configurations within their Salesforce organization. By leveraging the table information, administrators can optimize integration setup, monitor configuration changes, and ensure compliance with organizational standards and regulations.

Scheduled Email Notification

The Org Health Tracker App offers two types of email notifications, providing administrators with essential insights into their organization's health status.

1. **Weekly Scheduled Notification:**
    a. Sent on a weekly basis.
    b. This email furnishes a detailed overview of the organization's vitality.
    c. It encompasses various aspects such as storage utilization for objects and files, profile usage statistics, license utilization data, static resource consumption, apex code coverage metrics, and role hierarchy details, including counts of assigned and unassigned user roles.

2. **Storage Exceeding 80% Notification:**
    a. In addition to the weekly email, administrators receive a notification when the organization's storage surpasses 80% of its limit.
    b. This email contains similar information as the weekly notification, in addition it is purposely activated when the organization reaches its storage threshol

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Thank you

for your interest in Aress Software.

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