



Install Instructions

Salesforce Optimizer App (Beta)

Salesforce, Summer '19

© Copyright 2000–2019 salesforce.com, inc. All rights reserved. Salesforce is a registered trademark of salesforce.com, inc., as are other names and marks. Other marks appearing herein may be trademarks of their respective owners.

CONSIDERATIONS



Important: As a beta feature, Salesforce Optimizer App is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for the Salesforce Optimizer App in the [Optimizer Trailblazer Community](#).

INSTALL THE APP

Install Salesforce Optimizer App (Beta) to start reviewing recommendations on how to streamline your org's implementation.

USER INTERFACE

Available in:

- Lightning Experience

EDITIONS

Available in:

- Professional
- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To run Salesforce Optimizer:

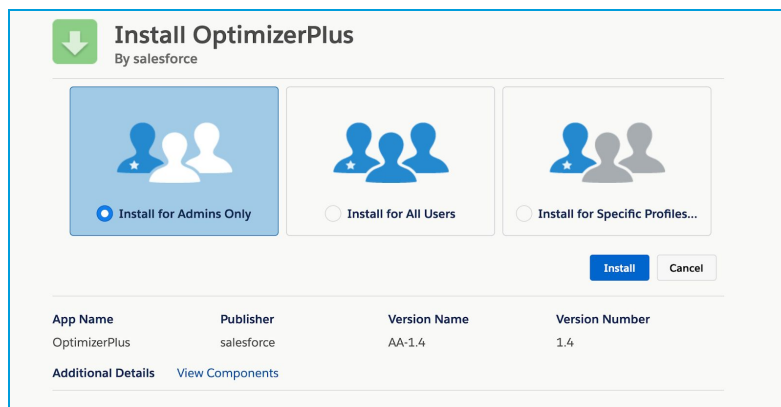
- Customize Application
- Modify All Data
- Manage Users

REQUIREMENTS

To run Salesforce Optimizer:

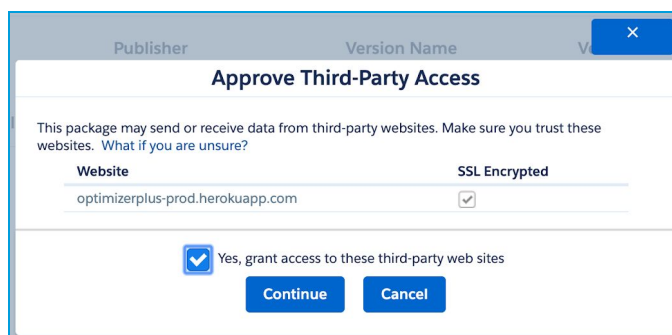
- Enable My Domain

1. Install the Salesforce Optimizer App from the AppExchange listing page.
2. On the installation page, install the app by selecting **Install for Admins Only**.



3. A window appears for you to approve third-party access.

 **Important:** The app is built on Heroku.





Tip: Installation takes a while. You are notified via email when installation is complete. If you see a Salesforce Optimizer Setup window, skip to Step 5.

4. From the Installed Packages setup page, click **Configure** under the Action column.

Installed Packages										
Action	Package Name	Publisher	Version Number	Namespace Prefix	Install Date	Limits	Apps	Tabs	Objects	AppExchange Ready
Uninstall Configure	OptimizerPlus	salesforce	1.4	adapps	7/18/2019 3:22 PM	✓	1	3	92	Passed

5. In the Salesforce Optimizer Setup window:
 - a. Click **Allow Access**. A confirmation window appears.
 - b. Click **Allow Scheduled Run**. The app runs after installation, so recommendations are available the first time you open the app. Future runs are scheduled to run during off hours.

Salesforce Optimizer Setup

1 **Allow access**

Salesforce Optimizer needs access to basic information and supporting metadata to create custom recommendations for your org.

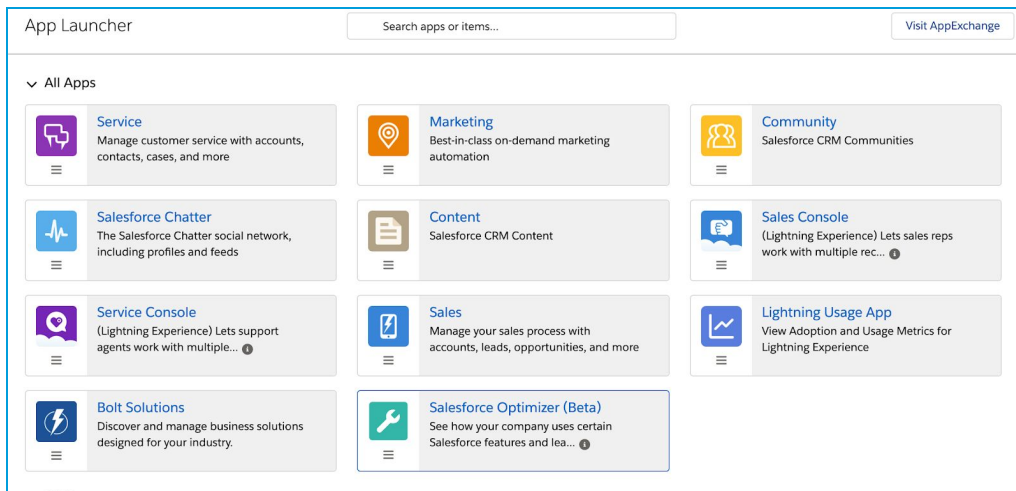
[Allow Access](#)

2 **Start Salesforce Optimizer scheduled runs**

Salesforce Optimizer is scheduled to run every two weeks. You can see when the next run is scheduled by going to Scheduled Jobs in Setup. To change the schedule, use the Developer Console.

[Allow Scheduled Run](#)

6. Open the App Launcher, then search for **Salesforce Optimizer (Beta)** and open the app.



7. To run the Optimizer on-demand, click **Run Optimizer** on the Results page. The process takes several minutes.



Warning: Don't run the Optimizer again until the update has finished. The last refreshed time and date appear above the Results list view.

KNOWN ISSUES



Important: As the Salesforce Optimizer App is Beta, there are some known issues.

- The Results list view filter may not open when clicked. Refresh the page and try again, or use sorting.
- Some of the Help resources are outdated or not available. Search Salesforce Help for the latest documentation.