A Salesforce org audit in five areas. Where to look in Setup.

An audit finds problems. It does not fix them.

Throughset

BEFORE YOU START

Day one: export what expires

SETUP AUDIT TRAIL DOWNLOAD

180 days

LOGIN HISTORY

Up to 20,000 records, past six months

API USAGE

The last 24 hours only

TOOLS

Optimizer is going. Four tools help.

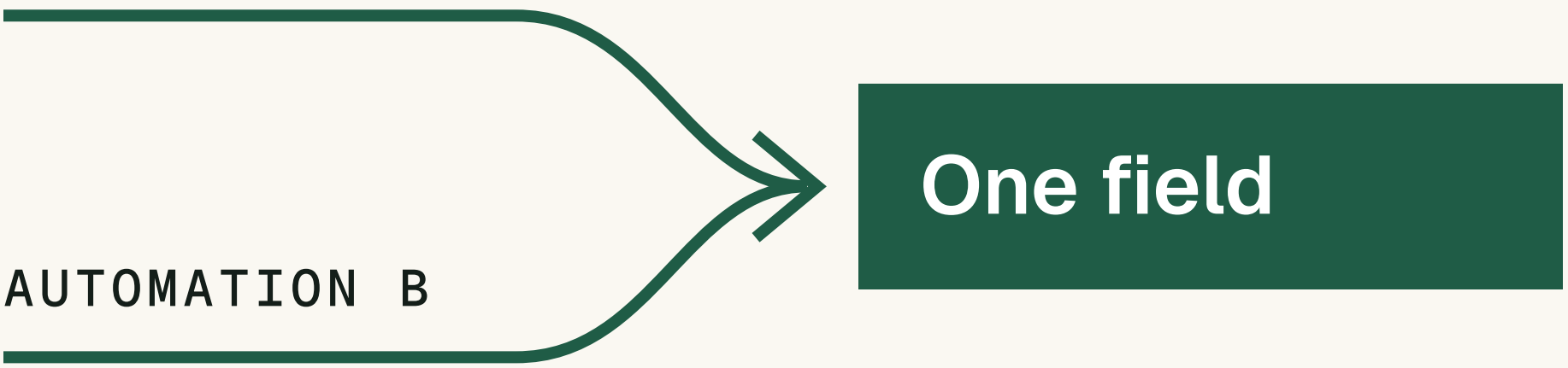
Salesforce scheduled Optimizer for retirement as of Winter '26. None of these tools replaces reading the org.

~~Optimizer~~

- Org Check
- Health Check
- Code Analyzer 5
- Setup Audit Trail

Automation: what runs when a record saves

List every rule, process, flow and trigger on each key object. Mark any field with two or more writers.



AREA 2 OF 5

Data: can people trust what is in the org?

Count custom fields per object. Before calling one unused, open Where is this used? An empty list is not proof.



AREA 3 OF 5

Integrations: what writes in, and what happens when it fails

List connected apps, installed packages and API users. Note the owner of each.

- Connected apps
- Installed packages
- API users

AREA 4 OF 5

Access: who can change what

List who holds these three permissions. Find leavers and frozen users.

View All Data

Modify All Data

Export Reports

AREA 5 OF 5

The admin backlog: our own method

Export every open request. Add one column: symptom of which finding in areas 1 to 4? Count requests with one cause.

OBJECT	PROCESS	REQUESTER	AGE	SYMPTOM OF WHICH FINDING?

Our method, not Salesforce's

THE PLAN

Turn findings into a ranked plan

For each finding: what is broken, what it costs to leave it, what it takes to fix.

High

Medium

Low

High, Medium and Low is our scale, not Salesforce's

THE CHECKLIST

Save this for your next audit.

Full checklist with the Salesforce sources: throughset.com/insights/salesforce-org-audit-checklist. Salesforce statements checked 28 October 2026.

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Your Salesforce has grown messy. We fix it.

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