TRIFECTA

Get Ready to Score Your Org!

Please follow the steps below, before your scheduled webinar, in order to create a personalized Salesforce Optimizer Report that will include areas noting how you can improve your Salesforce implementation.

Note that the Optimizer Report is available for the following editions: Professional, Enterprise, Performance, Unlimited and Developer.

1. Check Your User Permissions

Make sure your administrator or whoever will run the report has the following permissions enabled:

- Customize Application
- Modify All Data
- Manage Users

To receive the Optimizer notifications in email, make sure the **API Enabled** user permission is also enabled, and in **Setup**, make sure the **Email Delivery** option is set to the **All Email** access level.

2. Run The Report

From Setup, enter "Optimizer**"** in the Quick Find box, then select **Optimizer**.

Click **Create PDF** | **Allow** | **Got It**.
Note: Some implementations have Sandbox and Production buttons instead of the Launch button. If that's the case for you, select the button that corresponds to the environment where you want to run the report.

Salesforce then generates the Optimizer Report in PDF format and also an XLS file which includes additional information. Both of these are saved in Salesforce Files.

Please be sure to run this report and have it readily available when you attend the Trifecta Score Your Org Webinar!