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The ultimate Salesforce Org Cleanup cheatsheet

Cleaning up your Salesforce org is a useful exercise to tackle technical debt and remove unnecessary complexity. This cheatsheet has a list of areas you should look into and information on how to act.

Cleaning up your org involves looking at many different areas. These are the most common ones

Org Cleanup Areas

Problem	What is it	Impact	How to tackle it
Duplicate fields	Fields with the same name and same intention. You could also have two different fields, with different names but they are used for the same purpose.	Your data is diluted between the two fields. Reporting consistently is not possible. Everyone has their own view of where and how the data should be captured.	1. Decide which field to keep 2. Migrate the data from the old field to this field 3. Find where the old field is being used and migrate those references to point to the new field
Unused Fields	Custom fields that are not used anywhere in your org. They are not referenced by Flows, Validation Rules, etc.	Your org has a limit of custom fields per object. Over time, these unused fields will add up and eat that limit. It also creates confusion amongst both users and admins as no one knows why the field is there and whether it's safe to remove it.	Once you are sure the field is not used anywhere, do the right thing; delete it.
Cluttered Page Layouts	Page layouts with too many fields and too many related lists.	End users are overwhelmed when editing or creating a record. Hard to understand which fields are important and which ones aren't. Slow performance.	Work with your end users to figure out a hierarchy of importance for your fields. Use sections on the page layout to group fields that relate to the same concept. Use the Lightning App Builder to create conditional sections that only appear when relevant.

Org Cleanup Areas

Unused Apex Classes	Like custom fields, apex classes can be left unused. Not referenced by any other class, Process Builder, Flow, etc.	It becomes a burden to developers working on the code base. It's not clear if the code is needed and if so, how, when, and why.	Keep the code in version control, then delete it. You can always restore it if needed.
Big chunks of commented code	Apex code that is commented out and not used	Similar to the above, it confuses developers working in the code base. No one knows why the code was commented, whether it's still relevant and whether it's safe to delete it.	Keep the code in version control, then delete it. You can always restore it if needed.
Hardcoded IDs	Harcoded Profile or User IDs in Validation Rules, Workflows, apex code and Flows	If the Profile is deleted or the User is deactivated, the automation now references invalid metadata. The automation would no longer run and you would not know unless someone reports it.	Use Custom Settings and Custom Metadata Types instead of hardcoding values.
Redundant Automation	Automation is repeated across Workflows, Process Builders, Flows, and apex.	It is difficult to understand which automation should take precedence. A record could go through the same logic twice, resulting in hard-to-debug bugs and unexpected behaviors.	When you identify duplicate automation, decide which tool should be used to host all those rules. For example, you might decide to consolidate 5 Workflows into a simpler Flow.
Conditions that can never be met	Conditions in Workflows, Validation Rules, etc., that can never be met. For example, a Validation Rule looks at a picklist value that has been renamed or deleted.	The automation or validation will no longer run. Reports using the value as a filter will now return the wrong data.	Before deleting/renaming a picklist value, find all the metadata that uses that value, and modify them to point to the new one.

Deleting fields can sometimes be useful to remove clutter, reduce complexity and prevent your org from hitting the limit of custom fields.

Before you delete a field, you must be aware of all the metadata where a field can be referenced, as deleting the field could break other areas in your org.

Field Usage Reference

Used by	How is it used
Page Layout	On the layout itself and their related lists
Custom Fields	On formula fields
Workflow Rules	On their criteria, fields to update and outbound messages
Validation Rules	On their criteria
Process Builder	On their criteria and fields to update
Flow	Entry criteria, decision, screen elements, assignment, etc.
Apex code	SOQL queries, DML and apex expressions
Sharing Rules	On their criteria
Assignment Rules (Lead, Case)	On their criteria
Restriction Rules	On their criteria
Reports	On their criteria
Dashboards	Dashboard filters
Email Templates	On the template content
Lightning Web Components	By importing the field using @salesforce/schema
Lightning Page	As the criteria for visibility rules in individual components
Path	The fields of the path itself
Field Set	Fields that make up the field set
CPQ data	Hardcoded in CPQ records such as attributes, pricing rules, etc.

Start your org cleanup today!