

DAILY, WEEKLY, MONTHLY & QUARTERLY

Tasks That Keep Your Salesforce Org Secure and Running Smoothly



Daily Checklist
Small daily actions prevent surprises and keep the Org stable.

- ☐ **Review the daily change report**
Start by checking what changed since yesterday. Elements shows every metadata modification so you can confirm expected deployments and catch unexpected updates quickly.
- ☐ **Triage new change requests or bug reports**
Open Elements to investigate related metadata the moment a request comes in. The dependency view speeds up impact analysis and helps you understand complexity up front.
- ☐ **Update process documentation or user stories**
Any time a new change begins, document the requirement and stories, link it to metadata and map the business process if relevant. This removes undocumented quick fixes that turn into long term debt.
- ☐ **Link process activities to metadata**
If a new flow, automation or process step has been added, make sure the correct metadata node is linked in Elements.
- ☐ **Add notes and context for changes**
Leave comments, link tickets or add annotations in Elements so future Admins can understand why a change was made.

The role of a Salesforce Admin or Architect is demanding whether you are a solo Admin managing everything yourself or part of a larger team supporting a complex Org. The rise of AI Agents, Vibe Coding and rapid platform innovation only increases the pressure. While those capabilities are exciting, they rely on strong foundations. You need well understood business processes, documented metadata and governed data before any AI can reliably build or support automation.

This article shares practical habits that Admins and Architects can build into their routine, supported by Elements.cloud and inspired by themes highlighted by Kate Lessard and Jennifer Le at the Agentforce World Tour New York event: security, documentation, user experience and Org management. The goal is simple. Give teams a cadence that keeps the Org secure, documented and running smoothly.

Why Admin Cadence Matters

Salesforce Orgs evolve constantly. New metadata, process tweaks, stakeholder requests and unexpected changes can create complexity quickly. Without structure, documentation gaps grow, technical debt accumulates and risk increases. Good Admin habits protect you from this. A regular rhythm supports clarity, compliance and safe change.

Elements.cloud is designed for exactly that kind of structured intelligence. It consolidates metadata, process understanding, documentation and governance in one place. With the right habits, it becomes the daily map of how the Org works and how it is changing.

What Elements.cloud Provides

A quick overview of the capabilities this cadence relies on:



Metadata dictionary

Elements automatically syncs your Salesforce Org into a living metadata dictionary. Objects, fields, automations, permissions and relationships are captured together with searchable detail and dependency visibility.



Configuration Mining

Elements can generate data model diagrams, automation dependency views and business processes directly from Salesforce metadata. This gives Admins a blueprint of how things actually operate behind the scenes.



Change tracking

Every metadata change is tracked. Daily summaries tell you who changed what, when and how. This supports tight governance, fast troubleshooting and an audit trail.



Documentation & context

Admins can link process maps, notes, business requirements and user stories directly to metadata. Nothing gets lost. Future teams understand why changes were made. Stakeholders get transparency. Consistency improves across the change lifecycle.

These foundations allow Admins and Architects to work proactively rather than reactively.



You can try many of the practices in this guide for free. **Elements.cloud offers a free plan** that lets you explore your Org, understand your metadata, and start building better documentation **straight away**. For teams that want deeper insight, automation, and collaboration, full access is available on paid plans ranging from \$100 to \$300 per month.

A Practical Admin Cadence

Daily, weekly, monthly and quarterly habits that strengthen your Org and reduce firefighting.



Daily Checklist

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Review the daily change report

Start by checking what changed since yesterday. Elements shows every metadata modification so you can confirm expected deployments and catch unexpected updates quickly.



Triage new change requests or bug reports

Open Elements to investigate related metadata the moment a request comes in. The dependency view speeds up impact analysis and helps you understand complexity up front.



Update process documentation or user stories

Any time a new change begins, document the requirement and stories, link it to metadata and map the business process if relevant. This removes undocumented quick fixes that turn into long term debt.



Link process activities to metadata

If a new flow, automation or process step has been added, make sure the correct metadata node is linked in Elements.



Add notes and context for changes

Leave comments, link tickets or add annotations in Elements so future Admins can understand why a change was made.



Weekly Cadence

These activities maintain structure and help you prepare for upcoming work.



Review the planned changes queue

Ensure all work has documented requirements, stories and links to metadata or process maps.



Generate or update diagrams for new processes

If anything new went live this week, use Configuration Mining to update your visual blueprints.



Run dependency checks for upcoming changes

Before implementing new fields, flows or permissions, run an impact analysis in Elements to reduce risk.



Ensure documentation completeness

New or modified metadata should always have clear descriptions and linked documentation.



Review sync status

Elements syncs metadata nightly but a weekly glance prevents missed updates.



Share weekly updates with stakeholders

Provide a simple summary of recent configuration changes, new processes or upcoming work.



Monthly Governance and Maintenance

These tasks protect against long term complexity and reduce technical debt.



Run a documentation completeness audit

Use reporting to identify gaps in metadata documentation, user stories or process links and close them.



Review usage and field population

Check which fields, picklists or objects are actually used. Identify unused items for cleanup.



Assess technical debt

Look for outdated fields, redundant automations, unused permission sets or low value metadata.



Update review dates or lifecycle metadata

For compliance critical items, mark when they should next be reviewed.



Prepare for upcoming releases

Ensure all diagrams, requirements and changes are accurately documented before large deployments.



Review governance and permissions

Check profiles, permission sets and access to sensitive data, supported by dependency and usage insights.



Update training materials and handover notes

Keep user documentation, in-app help and internal notes aligned to your most recent changes.



Quarterly or Annual Deep Dive

Periodic reviews catch strategic issues and help reset the Org's direction.



Identify stale reports, dashboards or jobs

Archive or delete items unused for long periods.



Conduct a full Org health review

Understand metadata growth and evaluate areas of rising complexity.



Prioritise technical debt backlog

Choose which items to address and which can wait.



Run security and compliance audits

Review sharing rules, permissions and documentation readiness.



Refresh process maps

Ensure diagrams reflect how the business works today.



Review onboarding and team documentation

Confirm new team members have what they need and close any knowledge gaps.



Check object record counts

Ensure custom objects remain below recommended volume thresholds and archive or delete where needed.

Example Workflow Snapshot

A simple summary Admins and Architects can use as a reference.

Cadence	Focus
Daily	Change report, request triage, documentation links, impact checks
Weekly	Sync check, updated diagrams, dependency analysis, documentation validation, stakeholder briefings
Monthly	Documentation audit, usage review, technical debt, permissions review, training and materials
Quarterly or Annual	Org health review, debt prioritisation, security audit, process refresh, report cleanup

Why This Cadence Works

- ✓ **It reduces the risk of configuration drift**
Teams always know what changed and why.
- ✓ **Documentation stays up to date**
Future Admins and Architects get clarity and context.
- ✓ **Technical debt is identified early**
Unused fields and outdated automations are removed before becoming a problem.
- ✓ **Change management becomes safer**
Impact analysis reduces the chance of breaking something unintentionally.
- ✓ **Governance improves**
Admins have reliable oversight of permissions, metadata lifecycle and audit trails.
- ✓ **Long term maintainability increases**
The Org becomes easier to run, easier to scale and easier for new team members to understand.

Final Thoughts

Managing a Salesforce Org will never be simple, but with the right habits and the right tools, it becomes far more predictable. A consistent cadence supported by Elements.cloud helps Admins and Architects move away from reactive firefighting and toward proactive governance.