

12 Salesforce features your org is *probably not using*

Each one closes a leak investor teams know well: duplicate sellers, missed calls, offers above MAO, profit nobody ties to a campaign. Check your org the way each line says, then tick a box. Editions checked against Salesforce Help on October 20, 2026.

1	Scheduled paths in record-triggered flows <i>Follow-up at day 3, 14, 45 that resets when a rep logs a call; contract deadline reminders.</i> CHECK Open Setup > Flows and your Lead flows. If none has a Scheduled Paths section in the Start element, you are not using it. EDITION All paid editions; Pro Suite capped at 5 flows	☐ Using ☐ Not yet
2	Matching and duplicate rules <i>Catch the same seller from three stacked lists before a second rep calls.</i> CHECK Setup > Duplicate Rules. If only the standard rules are active and nobody changed them, you are on defaults that do not know about property addresses. EDITION Essentials, Professional, Enterprise, Unlimited	☐ Using ☐ Not yet
3	Omni-Channel routing for leads <i>Hand each new seller lead to the next available rep, by capacity and market.</i> CHECK Setup > Omni-Channel Settings. If it is off, or on with no routing configuration for Lead, you are not using it. EDITION Edition and licensing: confirm with Salesforce	☐ Using ☐ Not yet
4	Custom notifications from Flow <i>Missed seller call: phone alert to the owner plus a callback task.</i> CHECK Setup > Notification Builder. If the list of custom notification types is empty, you are not using it. EDITION Essentials, Professional, Enterprise, Unlimited	☐ Using ☐ Not yet
5	Path with guidance <i>Key fields and a checklist at each deal stage: no offer without comps and repairs.</i> CHECK Open any deal. If the stage bar has no "Key Fields" or "Guidance for Success" panel, the path is there but empty. EDITION Essentials to Unlimited; Lightning only	☐ Using ☐ Not yet
6	Dynamic Forms and Dynamic Actions <i>Underwriting fields after the appointment; contract fields only when under contract.</i> CHECK Open the record page in Lightning App Builder. If you see one big "Record Detail" component, you are still on page layouts. EDITION Group to Unlimited; Starter/Pro Suite not confirmed	☐ Using ☐ Not yet

7

Screen flows for intake and offers
☐ Using
☐ Not yet
Seller intake script that creates the Property and a draft MAO during the call.

CHECK Setup > Flows, filter Type = Screen Flow. If the list is empty or only has sample flows, intake still happens in free text.

EDITION Uses your flow allowance (5 on Pro Suite)

8

Field History Tracking and Setup Audit Trail
☐ Using
☐ Not yet
Who reassigned the lead, moved the stage, changed the lead source. Who edited that flow.

CHECK Open a deal and look for a History related list. If it is missing or empty, nobody is tracking.

EDITION 20 fields per object, no currency fields; Professional and up

9

Joined reports and report subscriptions
☐ Using
☐ Not yet
Campaign spend next to closed profit, emailed every Monday at 7.

CHECK Reports tab, filter by format. If you have no joined reports and nobody gets a Monday email, the owner is building ROI in a spreadsheet.

EDITION Joined reports: Enterprise and up

10

Flow approval processes
☐ Using
☐ Not yet
Offers above MAO need a manager's yes before they go out.

CHECK Setup > Approval Processes and Setup > Flows. If neither has anything on Opportunity, offers above MAO are approved over text messages.

EDITION Enterprise and up; Lightning only

11

HTTP Callout in Flow with Named Credentials
☐ Using
☐ Not yet
Send leads to your texting tool or pull property data without Zapier.

CHECK Setup > Named Credentials. If it is empty and you pay for Zapier, there is probably a Zap that could be a flow.

EDITION GA; edition not stated, confirm with Salesforce

12

Einstein Conversation Insights
☐ Using
☐ Not yet
Search calls for "probate" or "already got an offer" and coach from real calls.

CHECK Setup > Einstein Conversation Insights. If it is off, the call recordings you already pay for are not searchable in Salesforce.

EDITION Enterprise: up to 2,000 free licenses; no summaries on Starter/Pro

Your score: ____ / 12. Count the "Using" boxes.

10–12

In good shape. Read the gotchas on the ones you use.

6–9

Solid base. Your gaps are the next leaks.

0–5

Most of what you pay for is off. Start with 2 and 4.

Salesforce Help documents editions under the older names (Professional, Enterprise, Unlimited); Salesforce began selling Core, Advanced and Max in September 2026. Confirm limits for your contract with Salesforce. Salesforce is a trademark of Salesforce, Inc.; this checklist is independent.

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Scored under 6? I'll walk through your org with you.

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