



DataMasker

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What's New in Data Masking

[Release Notes 1.28.5 \(May 2023\)](#)

[Release Notes 1.28.4 \(Jan-2023\)](#)

[Release Note 1.27.1 \(Sep-2022\)](#)

[Release Note 1.26 \(Jul-2022\)](#)

[Release Note 1.24 \(May-2022\)](#)

[Release Note 1.23 \(Feb-2022\)](#)

[Release Note 1.22 \(Dec-2021\)](#)

[Release Note 1.21 \(Sep-2021\)](#)

Install and Setup Data Masker

FAQ

Is DataMasker Free?

Yes. DataMasker is FREE for life for up to 4 objects. You can mask millions of records at a blazing-fast speed for \$0. The installation is easy with the setup wizard handholding you at every step. And if you get stuck or need support, then contact us through the website chat. We are here to make sure you are successful with your Salesforce Sandbox masking needs.

What are the steps to deploy DataMasker?

4 EASY STEPS TO DEPLOY DATAMASKER

- 1** **INSTALL & TEST DATAMASKER IN SANDBOX**
Setup and Test all your masking use cases, ideally in a full-copy Sandbox.
- 2** **INSTALL DATAMASKER IN PRODUCTION**
Install DataMasker in Prod. This will ensure that future refresh move DataMasker install & mappings to all sandboxes.
- 3** **IMPORT MAPPING INTO PRODUCTION**
Import masking mappings into Production. These cannot be tested here as DataMasker does NOT run in Prod Orgs.
- 4** **REFRESH SANDBOX**
Refresh sandbox. DataMasker and all the mappings get copied to the Sandbox. You are ready to hit the button 'Run Masking' 🚀

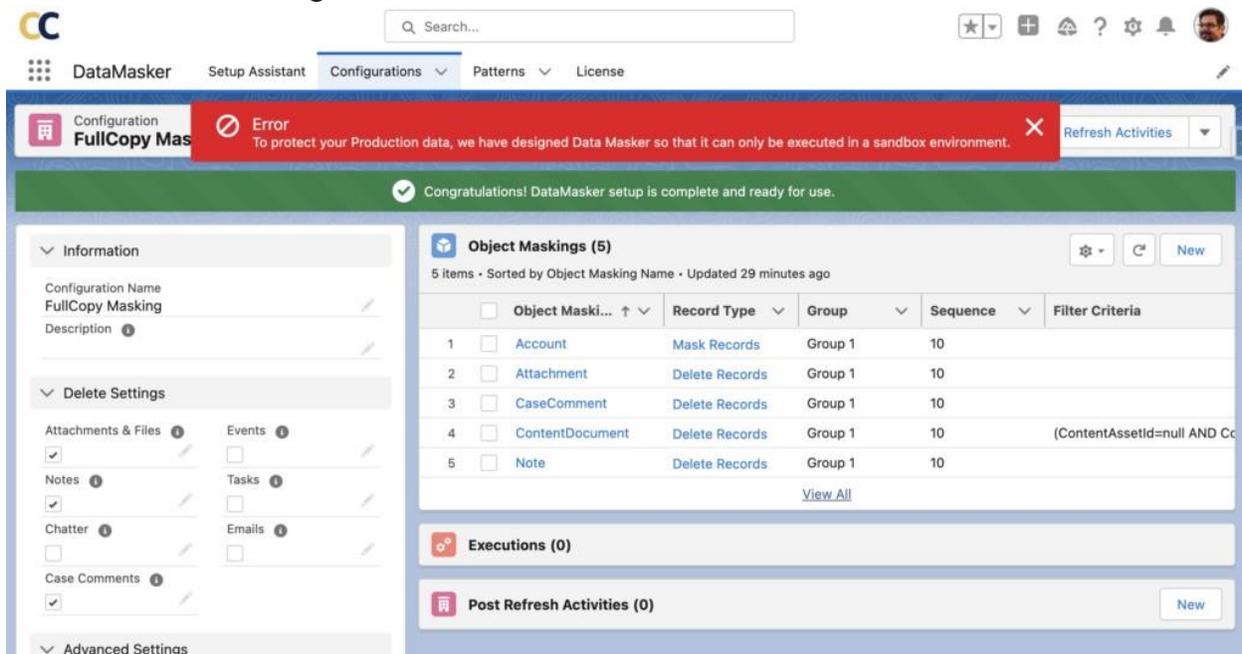
Can DataMasker run in PROD (I hope NOT 🙄)

DataMasker is deployed in PROD so that it gets copied into every refreshed sandbox org. To ensure that DataMasker **NEVER** runs in a PROD Salesforce Org, we have constraints built into it.

DataMasker uses Salesforce standards-based approach(isSandbox) when masking is initiated. It only runs if it detects that the Org is a Dev or a Sandbox Org.

No matter how masking is initiated – By clicking the ‘Run Masking’ Button or through the APEX or REST API – DataMasker will **NOT** run in a PROD org.

Appended is a screenshot of the error users will see in case masking is triggered in PROD from the button ‘Run Masking’.



The screenshot shows the DataMasker interface. At the top, there is a search bar and navigation tabs for 'DataMasker', 'Setup Assistant', 'Configurations', 'Patterns', and 'License'. A red error banner at the top reads: 'Error To protect your Production data, we have designed Data Masker so that it can only be executed in a sandbox environment.' Below the error banner is a green success message: 'Congratulations! DataMasker setup is complete and ready for use.' The main content area is divided into sections: 'Information' (Configuration Name: FullCopy Masking, Description), 'Delete Settings' (Attachments & Files, Notes, Chatter, Case Comments, Events, Tasks, Emails), and 'Advanced Settings'. The 'Object Maskings (5)' section is expanded, showing a table with 5 items. The table has columns for Object Masking Name, Record Type, Group, Sequence, and Filter Criteria. The items are: 1. Account (Mask Records, Group 1, Sequence 10), 2. Attachment (Delete Records, Group 1, Sequence 10), 3. CaseComment (Delete Records, Group 1, Sequence 10), 4. ContentDocument (Delete Records, Group 1, Sequence 10, Filter Criteria: (ContentAssetId=null AND Co...), 5. Note (Delete Records, Group 1, Sequence 10). Below the table are sections for 'Executions (0)' and 'Post Refresh Activities (0)'. A 'View All' link is present at the bottom of the table.

	Object Maski...	Record Type	Group	Sequence	Filter Criteria
1	Account	Mask Records	Group 1	10	
2	Attachment	Delete Records	Group 1	10	
3	CaseComment	Delete Records	Group 1	10	
4	ContentDocument	Delete Records	Group 1	10	(ContentAssetId=null AND Co...
5	Note	Delete Records	Group 1	10	

Appended is the REST response indicating that DataMasker execution is prohibited in Production Org.

Try the [Salesforce APIs for Postman](#).

Choose an HTTP method to perform on the REST API service URI below:

GET POST PUT PATCH DELETE HEAD

/services/apexrest/pcldm/v1/DataMaskerService

Request Body

```
{
  "dataMaskingRequest": {
    "maskingId": "conf-001"
  }
}
```

[Expand All](#) | [Collapse All](#) | [Show Raw Response](#)

- status: **false**
- message: **Data Masker Run only in Sandbox**

Installing The DataMasker Application

Step 1: Search for DataMasker

Navigate to the DataMasker listing on AppExchange. Here is the [LINK](#)

The screenshot shows the Salesforce AppExchange search results for 'DataMasker'. The search bar at the top contains 'DataMasker'. The results list includes 'Cloud Compliance DataMasker - World's Fastest Salesforce Data Masking', which is highlighted with a red box. A detailed view of this app is shown on the right, including its features, rating (5 stars), and categories (Data Cleansing). The app is listed as 'Free' and has a 'More' button at the bottom right.

Step 2: Install DataMasker

To install the application, click on the **Get It Now** button.

appexchange

Search AppExchange

Sign Up Log In

Home Solutions by Type Product Collections Industry Collections Consultants Learn Latest Collections COVID-19

< SEARCH RESULTS | ALL APPS > IT & ADMINISTRATION > DATA CLEANSING

Cloud Compliance DataMasker - World's Fastest Salesforce Data Masking By Cloud Compliance

WORLD'S FASTEST DATA MASKING

Mask 99M Records in 24 Hours

100% Salesforce Native

No Email Blasts

Get going in 30 mins!

TRUSTED BY

PayPal Deloitte iRobot Revolution Life

1 of 12 : Datamasker By Cloud Compliance

Get It Now

Free

Watch Demo

RATING ★★★★★ (6)

CATEGORIES Data Cleansing

LATEST RELEASE 3/21/2022

Protect Your Organization from Breaches and GDPR/CPRA Fines!
World's fastest on-platform Data Masking tool

- Mask 99 Million in 24 hours
- Get Customized Masking
- Comply with CPRA/GDPR/LGPD
- Prevent email blasts by muting other automations
- Turned on by DevOps ❤️

Step 3: Add Installation Details

- Key in the Installation Key (Contact Cloud Compliance Team at **info@cloudcompliance.app**)
- Select the option *Install for Admins Only*



Install Data Masker

By PlumCloud Labs



This app is protected by an installation key.

Password

Install for Admins Only

Install for All Users

Install for Specific Profiles...

Install

Cancel

App Name

Data Masker

Publisher

PlumCloud Labs

Version Name

ver 1.0

Version Number

1.23

[Additional Details](#)

[View Components](#)

Note – User can confirm completion of installation by going to **Setup -> Deployment Status**



SETUP

Deployment Status

Deployment Status

Deployment Succeeded

Name: 0AfB00000nBVGe
Type: API
Deployed By: [Radha H](#)
Start Time: 08/02/2023, 11:16 am
End Time: 08/02/2023, 11:19 am

1 Deploy Components

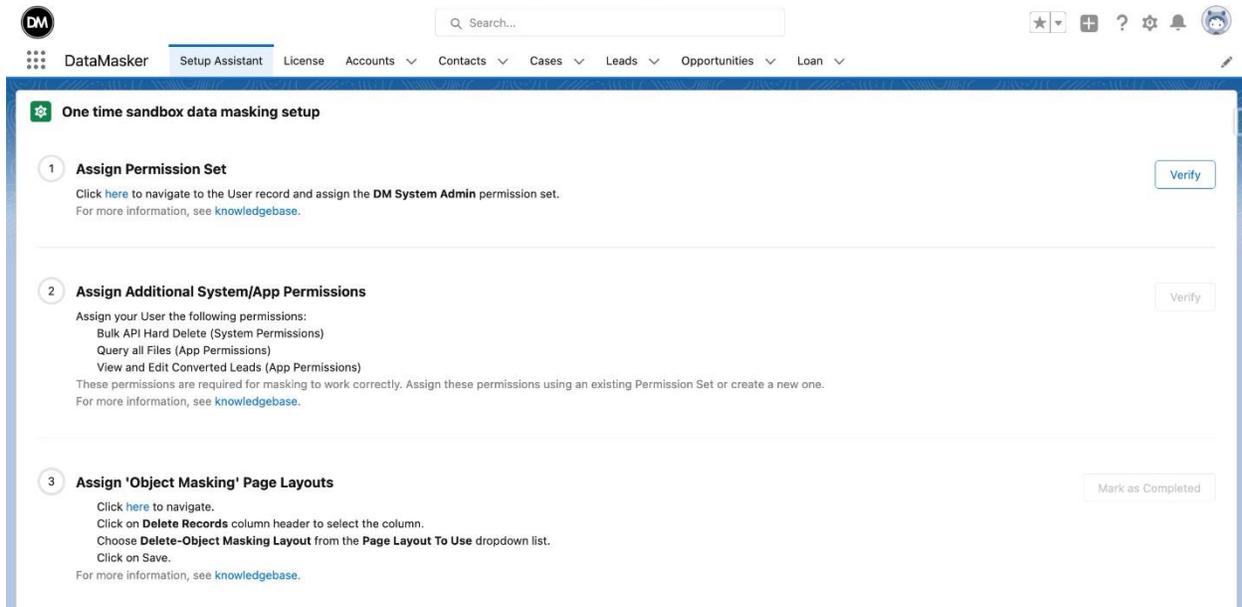


2 Run Apex Tests



Setup Assistant

This article covers the use of the DataMasker Setup Assistant to configure the org and run the DataMasker application. Once you switch to the DataMasker application, you will automatically be navigated to the Setup Assistant tab. This tab will help you set up and configure the application and allow you to create a sample configuration.



Step 1: Assign Permissions Set

- You can assign DataMasker System Administrator permissions to a user with System Administrator or an equivalent profile.
- Click on the link labeled 'here' to navigate to the permission set assignment. Here, you can see the 'DM System Admin' permission set that can then be assigned.

Assign the permission set 'DM System Admin'.

SETUP
Permission Sets

Permission Set Assignments
Chetan Paunikar

Save Cancel

Available Permission Sets

- CRM User
- DM System Admin Clone 1.22 beta 4
- DM System Admin Clone 1.4 released
- DM System Admin Clone 1.5 beta 1
- Rollup Helper - All Access
- Rollup Helper - Read Access
- Salesforce CMS Integration Admin
- Salesforce Console User
- Slack Service User
- Standard Einstein Activity Capture

Add
Remove

Enabled Permission Sets

- DM System Admin

Save Cancel

Click on the Save button.

Note – For more information on permission sets, you can navigate to a different knowledge base article titled, “Assign Permission Sets to your Profile”.

For more information, [click here](#).

DM

DataMasker Setup Assistant License Accounts Contacts Cases Leads Opportunities Loan

Search...

★ + ? ⚙️ 🔔 🗨️

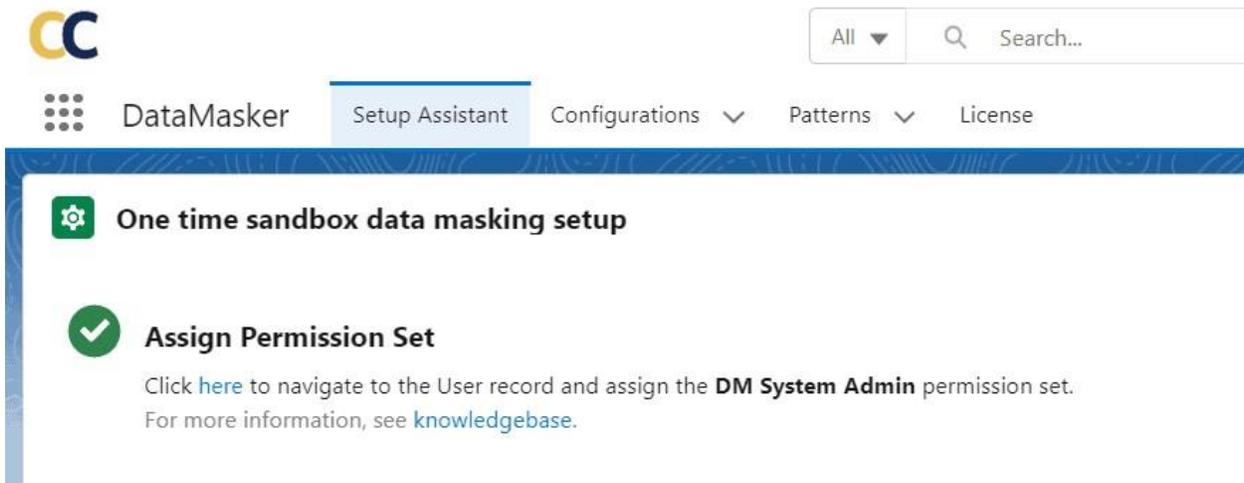
One time sandbox data masking setup

- 1 Assign Permission Set** Verify
Click [here](#) to navigate to the [User record](#) and assign the **DM System Admin** permission set.
For more information, [see knowledgebase](#).
- 2 Assign Additional System/App Permissions** Verify
Assign your User the following permissions:
 - Bulk API Hard Delete (System Permissions)
 - Query all Files (App Permissions)
 - View and Edit Converted Leads (App Permissions)These permissions are required for masking to work correctly. Assign these permissions using an existing Permission Set or create a new one.
For more information, see [knowledgebase](#).
- 3 Assign 'Object Masking' Page Layouts** Mark as Completed
Click [here](#) to navigate.
Click on **Delete Records** column header to select the column.
Choose **Delete-Object Masking Layout** from the **Page Layout To Use** dropdown list.
Click on Save.
For more information, see [knowledgebase](#).

- After assigning the Permission set, you can click on “Verify” on the Home page of the Setup Assistant to check that the permission set has been successfully assigned.
- After clicking on “Verify”, a green tick will appear that indicates that the Permission Set has been assigned successfully



- If you assigned the DM System Admin permission set directly without navigating from the Setup Assistant page, just refresh the page to see the green marker appear as shown above.



To perform Data Masking, you’ll need 3 additional permissions:

- I. Bulk API Hard Delete (User can find System Permission in Permission Set)
- II. Query all Files (User can find App Permission in Permission Set)
- III. View & Edit Converted Leads (User can find App Permission in Permission Set)

You’ll need to assign these through an already existing permission set or by creating a new Permission Set.

The screenshot shows the 'One time sandbox data masking setup' page in the DataMasker application. It is currently on step 2, 'Assign Additional System/App Permissions'. The list of permissions to be assigned is highlighted with a red box: Bulk API Hard Delete (System Permissions), Query all Files (App Permissions), and View and Edit Converted Leads (App Permissions). A 'Verify' button is visible at the end of the step.

For more information, [click here](#).

This screenshot shows the same setup page as above, but step 2 is now completed, indicated by a green checkmark. The 'Verify' button is no longer present. The list of permissions remains highlighted with a red box.

- As mentioned in Step 1, after assigning the permissions you can click on “Verify” to check whether the permission set has been assigned correctly.

This screenshot shows the setup page with step 2 completed. The 'Verify' button at the end of step 2 is highlighted with a red box.

- After clicking on the **Verify** button user will see a green tick that shows Permission Set has been assigned successfully.

 **Assign Additional System/App Permissions**

Assign your User the following permissions:

Bulk API Hard Delete (System Permissions)

Query all Files (App Permissions)

View and Edit Converted Leads (App Permissions)

These permissions are required for masking to work correctly. Assign these permissions using an existing Permission Set or create a new one.

For more information, see [knowledgebase](#).

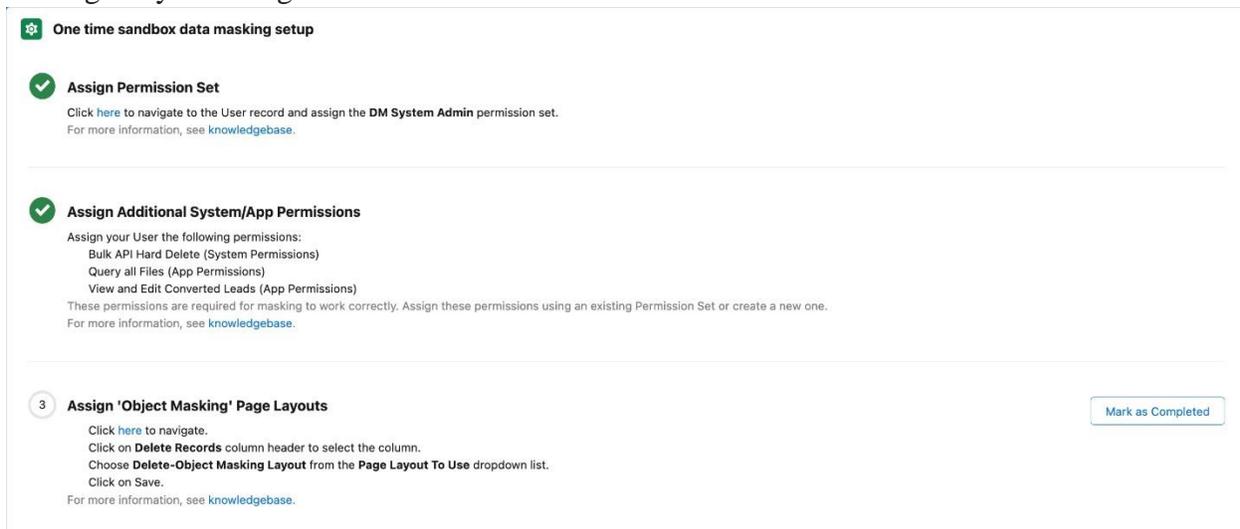
- Suppose the user has given these three permissions directly without navigating from the Setup Assistant page. Then the user needs just to Refresh the page and will see the Green tick will appear automatically as shown above.

Step 3: Assign Object Masking Page Layouts

Data Masker offers different page layouts for 'Masking' and 'Deletion'.

The 'Masking Page Layout' is used to add field masking, whereas the 'Deletion Page Layout' is used to delete records.

To assign an Object Masking Page Layout click on the link 'here' as seen. It will redirect you to the Page Layout Assignment screen.



One time sandbox data masking setup

 **Assign Permission Set**
Click [here](#) to navigate to the User record and assign the **DM System Admin** permission set.
For more information, see [knowledgebase](#).

 **Assign Additional System/App Permissions**
Assign your User the following permissions:
Bulk API Hard Delete (System Permissions)
Query all Files (App Permissions)
View and Edit Converted Leads (App Permissions)
These permissions are required for masking to work correctly. Assign these permissions using an existing Permission Set or create a new one.
For more information, see [knowledgebase](#).

3 **Assign 'Object Masking' Page Layouts** Mark as Completed
Click [here](#) to navigate.
Click on **Delete Records** column header to select the column.
Choose **Delete-Object Masking Layout** from the **Page Layout To Use** dropdown list.
Click on **Save**.
For more information, see [knowledgebase](#).

For more information about page layout assignments, [click here](#).



Assign 'Object Masking' Page Layouts

- Click [here](#) to navigate.
- Click on **Delete Records** column header to select the column.
- Choose **Delete-Object Masking Layout** from the **Page Layout To Use** dropdown list.
- Click on Save.

For more information, see [knowledgebase](#).

- After assigning the layouts, click “Mark as Completed”.



One time sandbox data masking setup



Assign Permission Set

Click [here](#) to navigate to the User record and assign the **DM System Admin** permission set.
For more information, see [knowledgebase](#).



Assign Additional System/App Permissions

Assign your User the following permissions:

- Bulk API Hard Delete (System Permissions)
- Query all Files (App Permissions)

View and Edit Converted Leads (App Permissions)

These permissions are required for masking to work correctly. Assign these permissions using an existing Permission Set or create a new one.

For more information, see [knowledgebase](#).

3

Assign 'Object Masking' Page Layouts

Click [here](#) to navigate.
Click on **Delete Records** column header to select the column.
Choose **Delete-Object Masking Layout** from the **Page Layout To Use** dropdown list.
Click on Save.

For more information, see [knowledgebase](#).

Mark as Completed

- Now, the green tick should be displayed showing that you have assigned the Object Masking Page Layouts successfully.



Assign 'Object Masking' Page Layouts

Click [here](#) to navigate.

Click on **Delete Records** column header to select the column.

Choose **Delete-Object Masking Layout** from the **Page Layout To Use** dropdown list.

Click on Save.

For more information, see [knowledgebase](#).

Step 4: Assigning 'Pattern' Page Layouts



Assign Additional System/App Permissions

Assign your User the following permissions:

Bulk API Hard Delete (System Permissions)

Query all Files (App Permissions)

View and Edit Converted Leads (App Permissions)

These permissions are required for masking to work correctly. Assign these permissions using an existing Permission Set or create a new one.

For more information, see [knowledgebase](#).



Assign 'Object Masking' Page Layouts

Click [here](#) to navigate.

Click on **Delete Records** column header to select the column.

Choose **Delete-Object Masking Layout** from the **Page Layout To Use** dropdown list.

Click on Save.

For more information, see [knowledgebase](#).



Assign 'Pattern' Page Layouts

Click [here](#) to navigate.

Click on the **Regex** column header to select the column.

Choose **Regex** from the **Page Layout To Use** dropdown list.

Click on Save.

For more information, see [knowledgebase](#).

Mark as Completed

DataMasker also offers a page layout for pattern objects. To set the page layout for pattern objects, users have to click the link and follow the same steps as above and select the appropriate pattern page layout for pattern object record types as shown in the below image.

Once clicking on the 'Mark as Complete', a green tick will appear and show 'The user has assigned Pattern Page Layouts successfully'.



Assign 'Pattern' Page Layouts

Click [here](#) to navigate.

Click on the **Regex** column header to select the column.

Choose **Regex** from the **Page Layout To Use** dropdown list.

Click on Save.

For more information, see [knowledgebase](#).

Step 5: Get a Sample Masking Configuration

Data Masker comes with a sample configuration for Accounts & Contacts.

Click on “Create Configuration” to get started with the sample configuration. If you know how to create a configuration, you can click directly on ‘Mask as Completed’ and skip the entire process.



The screenshot shows a configuration wizard with three steps. Step 5, 'Get a Sample Masking Configuration', is the active step. It includes a 'Create Configuration' button (highlighted with a red box) and a 'Mark as Completed' button. The previous step, 'Assign 'Pattern' Page Layouts', is completed and has a 'Take me there' button. The next step, 'View Masking Configurations', is also completed and has a 'Take me there' button.

Assign 'Pattern' Page Layouts

- Click here to navigate.
- Click on the **Regex** column header to select the column.
- Choose **Regex** from the **Page Layout To Use** dropdown list.
- Click on Save.

5 Get a Sample Masking Configuration

Data Masker comes packaged with sample configuration for **Accounts & Contacts**. Click on **Create Configuration** to get started with the sample configuration.

Create Configuration **Mark as Completed**

View Masking Configurations

Check out the Configuration and get going.

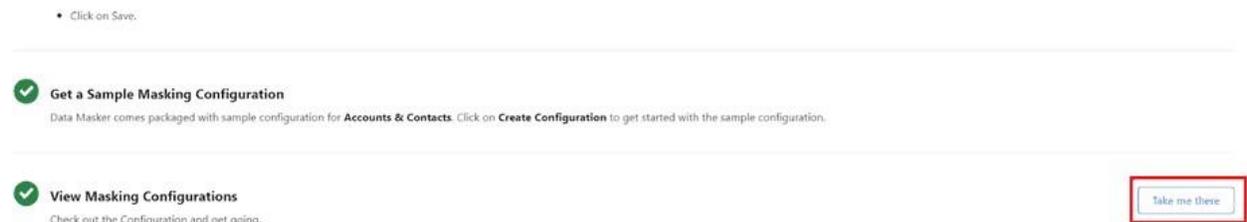
Take me there

When you click on ‘Create Configuration’, a popup will appear displaying ‘Sample Configuration Created Successfully’. This will create a sample configuration of Accounts & Contacts Object Masking Records and some sample Field Masking Records.

Step 6: View Masking Configurations

To view the Sample Configuration or to create a new configuration click on ‘Take me there’.

Click on the ‘**Take me there**’



The screenshot shows the same configuration wizard as in Step 5, but now Step 6, 'View Masking Configurations', is the active step. The 'Take me there' button is highlighted with a red box. The previous step, 'Get a Sample Masking Configuration', is completed and has a 'Take me there' button.

Get a Sample Masking Configuration

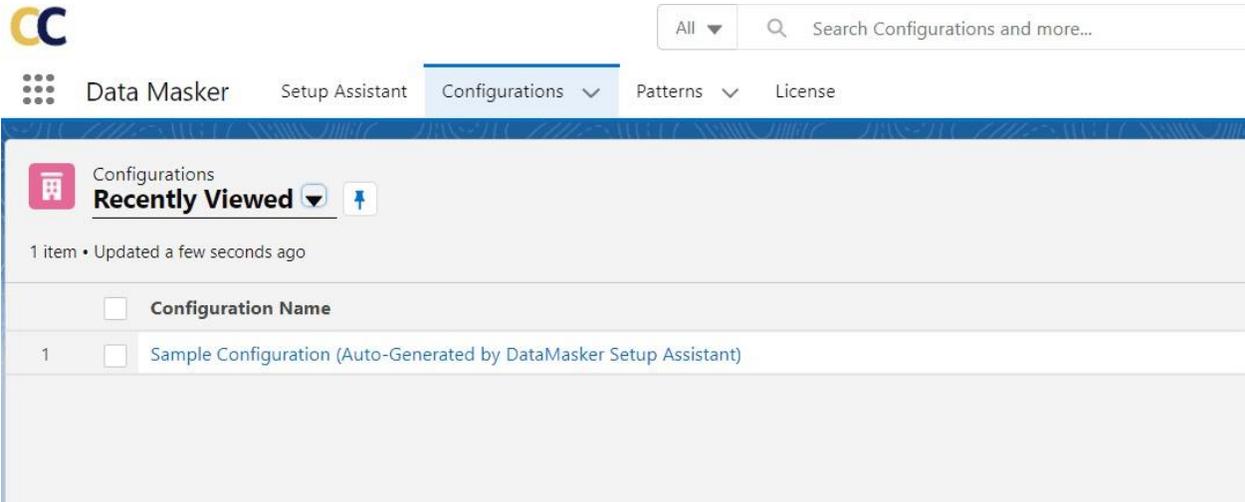
Data Masker comes packaged with sample configuration for **Accounts & Contacts**. Click on **Create Configuration** to get started with the sample configuration.

View Masking Configurations

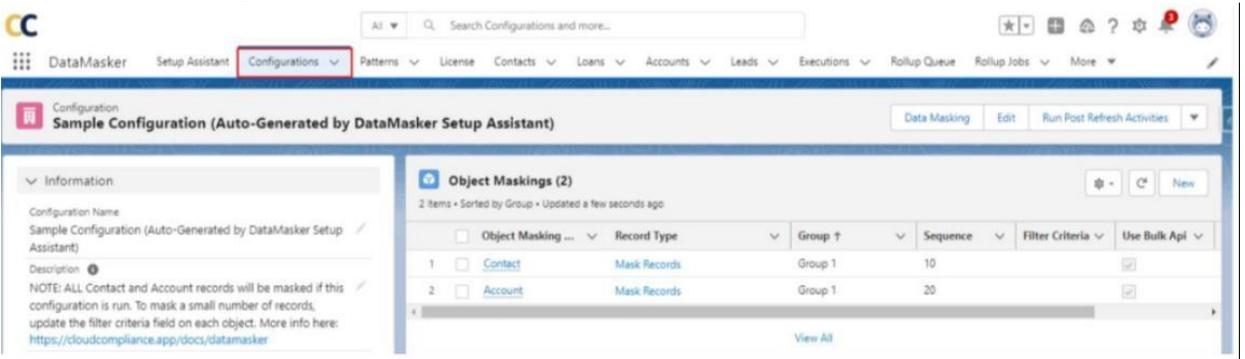
Check out the Configuration and get going.

Take me there

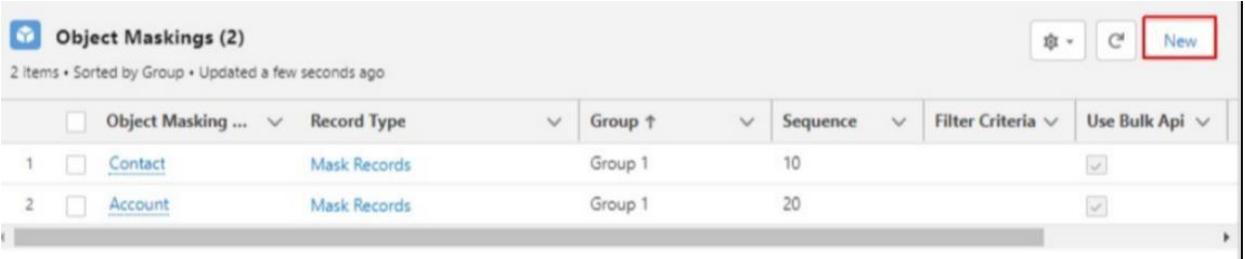
This link will directly take you to the Configuration page where the Sample Configuration has already been created.



Click on the Configuration name



In the Object Masking section, some sample object masking records should already be there. If you want to add some additional object masking records, then click on the 'New' button.



On the Contact Object Masking, some sample field records are provided. If you want to add some additional field masking records, then click on the 'New' button.

Object Label: Contact Record Type: Mask Records Configuration: [Sample Configuration \(Auto-Generated by DataMasker Setup Assistant\)](#) Batch Size: 2,000

Details

Object API: Contact
Description:
Filter Criteria: ⓘ
Group: Group 1
Sequence: 10

Field Maskings

Reset Save

<input type="checkbox"/>	Field	Action	Replace With	Replacing Value
<input type="checkbox"/>	(CC_DateField_c)	Erase	Random	Auto-Generated
<input type="checkbox"/>	CC_DateTimeField (CC_DateTimeField_c)	Erase	Random	Auto-Generated
<input checked="" type="checkbox"/>	CC_EmailField (CC_EmailField_c)	Replace	Pattern - Regex	Email-Regex
<input checked="" type="checkbox"/>	CC_EncryptedField (CC_EncryptedField_c)	Replace	Random	Auto-Generated
<input type="checkbox"/>	CC_GeoLocationField (Latitude) (CC_GeoLocationField_Latt...	Erase	Random	Auto-Generated

Track Masking Progress With The Custom Field ‘Masking Status’ (Optional)

It is important to track if all the records did mask after the masking operation is complete. The recommended way to track this is by adding a custom field ‘Masking Status’ on each of the objects that are being masked. All the records that are successfully masked will be set with the value ‘Masked’ by DataMasker. Any record with the ‘Masking Status’ = NULL is not masked. This field helps in re-trying masking failures and also helps in troubleshooting.

Adding the custom field ‘Masking Status’ on each of the Objects being masked is highly recommended.

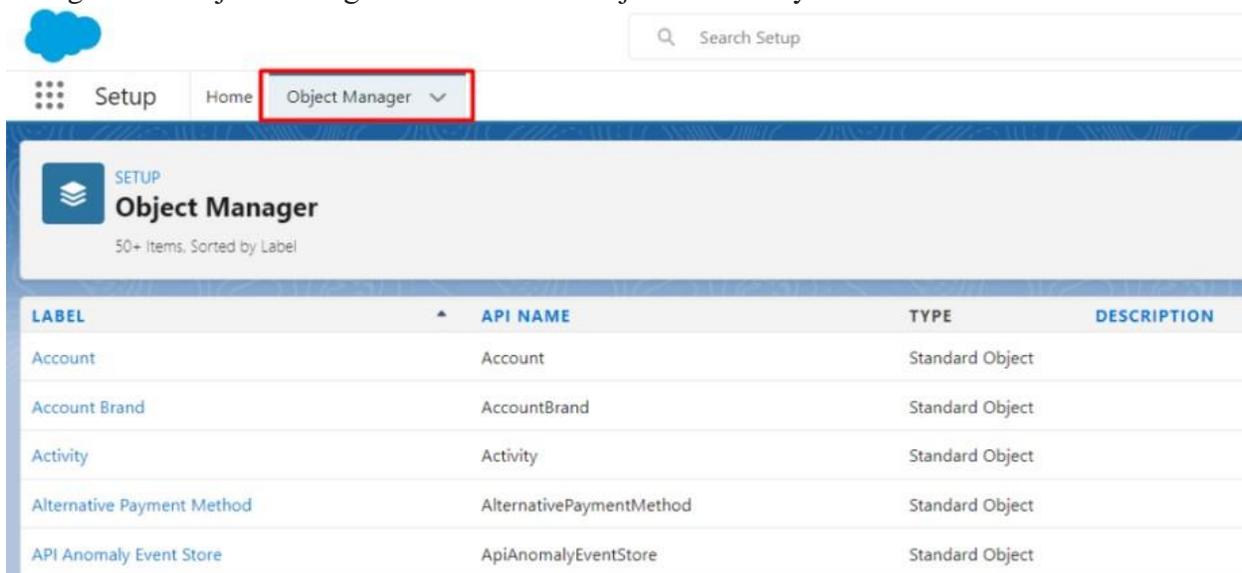
Overview

1. Create a custom field ‘Masking Status’
2. Add ‘Masking Status’ to each of the ‘Object Masking’ records

Step 1: Create a custom field ‘Masking Status’

Add Custom Field ‘Masking Status’ to each of the Object that is being masked.

Navigate → ‘Object Manager’ and Select the object in which you need to add a field.

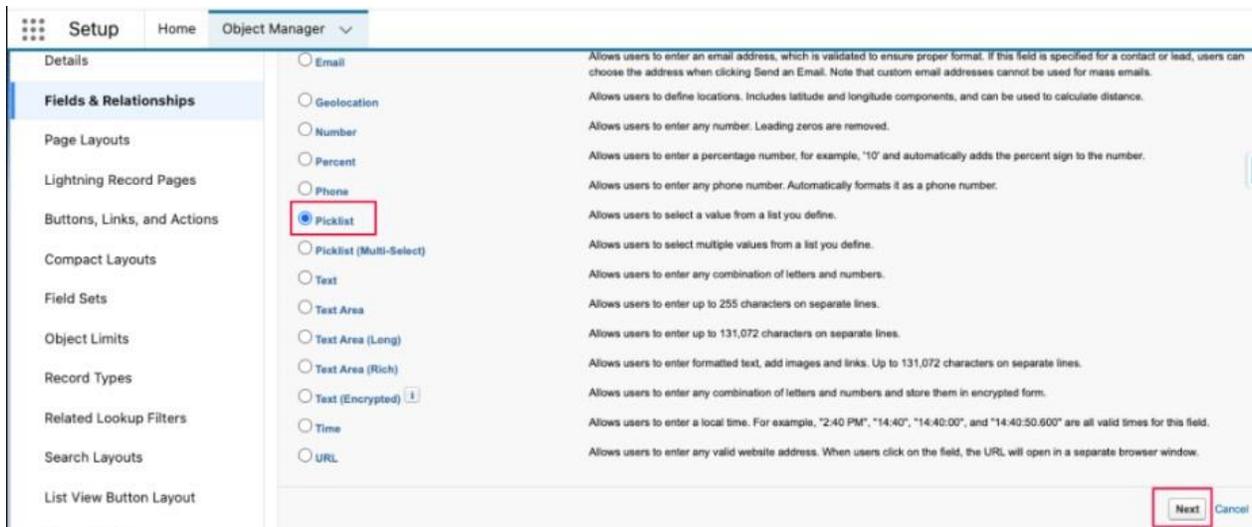


The screenshot shows the Salesforce Object Manager interface. At the top, there is a navigation bar with 'Setup', 'Home', and 'Object Manager' (highlighted with a red box). Below this is a search bar labeled 'Search Setup'. The main content area is titled 'Object Manager' and shows a list of objects. The table below is a representation of the objects shown in the screenshot.

LABEL	API NAME	TYPE	DESCRIPTION
Account	Account	Standard Object	
Account Brand	AccountBrand	Standard Object	
Activity	Activity	Standard Object	
Alternative Payment Method	AlternativePaymentMethod	Standard Object	
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object	

Navigate -> ‘Fields and Relationships’, and click on ‘New’

- Select Data Type Picklist
- Click on Button ‘Next’



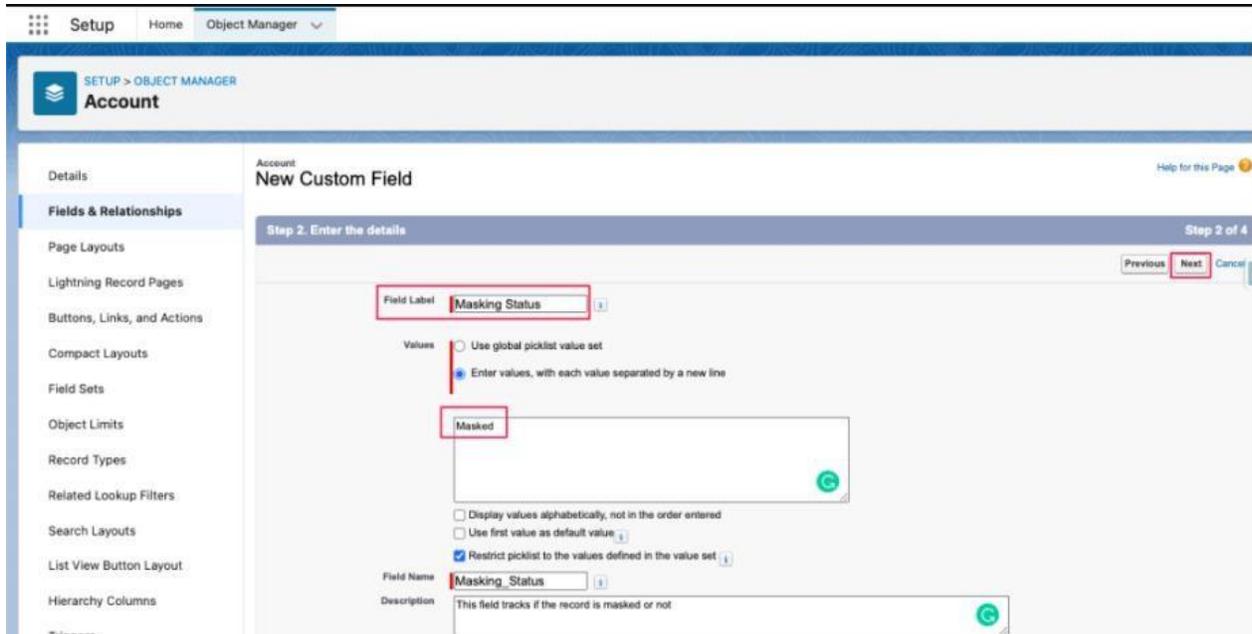
Key in the field details:

-Field Label: 'Masking Status'

-Values: Select 'Enter values, with each value separated by a new line'

Enter Value: Masked

Click on Button 'Next'



Select 'Visible' for each of the profiles under which DataMasker will run.

Click 'Next'

Field Label: Masking Status
Data Type: Picklist
Field Name: Masking_Status
Description: This field tracks if the record is masked or not

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Field-Level Security for Profile	<input type="checkbox"/> Visible	<input type="checkbox"/> Read-Only
Adviser	<input type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Integration User	<input type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input type="checkbox"/>	<input type="checkbox"/>
Customer Community Login User	<input type="checkbox"/>	<input type="checkbox"/>
Customer Community Plus Login User	<input type="checkbox"/>	<input type="checkbox"/>
Customer Community Plus User	<input type="checkbox"/>	<input type="checkbox"/>
Customer Community User	<input type="checkbox"/>	<input type="checkbox"/>
FSC Admin	<input type="checkbox"/>	<input type="checkbox"/>
FSC Associate Banker	<input type="checkbox"/>	<input type="checkbox"/>
FSC Mortgage Officer	<input type="checkbox"/>	<input type="checkbox"/>
FSC Personal Banker	<input type="checkbox"/>	<input type="checkbox"/>
FSC Wealth Advisor	<input type="checkbox"/>	<input type="checkbox"/>
Marketing User	<input type="checkbox"/>	<input type="checkbox"/>
Minimum Access - Salesforce	<input type="checkbox"/>	<input type="checkbox"/>
Partner Community Login User	<input type="checkbox"/>	<input type="checkbox"/>
Partner Community User	<input type="checkbox"/>	<input type="checkbox"/>
Personal Banker	<input type="checkbox"/>	<input type="checkbox"/>
Read Only	<input type="checkbox"/>	<input type="checkbox"/>
Relationship Manager	<input type="checkbox"/>	<input type="checkbox"/>
Service Cloud	<input type="checkbox"/>	<input type="checkbox"/>
Service Cloud User	<input type="checkbox"/>	<input type="checkbox"/>
Solution Manager	<input type="checkbox"/>	<input type="checkbox"/>
Standard User	<input type="checkbox"/>	<input type="checkbox"/>
System Administrator	<input checked="" type="checkbox"/>	<input type="checkbox"/>

- Unselect all of the Page Layout
- Click on the button 'Save'

Account
New Custom Field

Step 4. Add to page layouts

Field Label: Masking Status
Data Type: Picklist
Field Name: Masking_Status
Description: This field tracks if the record is masked or not

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout. To change the values that appear, you will need to customize the Record Types.

<input type="checkbox"/> Add Field	Page Layout Name
<input type="checkbox"/>	Account (Business Referral) Layout
<input type="checkbox"/>	Account (Business) Layout
<input type="checkbox"/>	Account (Household) Layout
<input type="checkbox"/>	Account (Individual) Layout
<input type="checkbox"/>	Account (Institution) Layout
<input type="checkbox"/>	Account (Policyholder) Layout
<input type="checkbox"/>	Account (Retail Client - Individual) Layout
<input type="checkbox"/>	Person Account Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Step 2: Add 'Masking Status' to each of the 'Object Masking' records

- Navigate to the DataMasker App
- Configurations tab
- Click on the Configuration Name

– Click on the Object. Example ‘Contact’ in the screenshot below

The screenshot shows the DataMasker configuration interface. At the top, it says 'Sample Configuration (Auto-Generated by DataMasker Setup Assistant)'. Below that, a green banner reads 'Congratulations! DataMasker setup is complete and ready for use.' The main content area is divided into two sections. On the left, under 'Information', there is a note: 'NOTE: ALL Contact and Account records will be masked if this configuration is run. To mask a small number of records, update the filter criteria field on each object. More info here'. On the right, under 'Object Maskings (2)', there is a table with the following data:

<input type="checkbox"/>	Object Masking ...	Record Type	Description	Group	Sequence	Filter Crit...
1	Contact	Mask Records		Group 1	10	
2	Account	Mask Records		Group 1	20	

Buttons for 'Run Masking', 'Edit', and 'Run Post Refresh Activities' are visible at the top right. A 'View All' link is at the bottom right of the table.

Click on the button ‘Edit’

The screenshot shows the 'Edit' page for the 'Contact' object. The top navigation bar includes 'DataMasker', 'Setup Assistant', 'Configurations', 'Patterns', and 'License'. The main header shows 'Object Masking Contact' with an 'Edit' button highlighted in a red box. Below the header, there is a summary section with the following details:

- Object Label: Contact
- Record Type: Mask Records
- Configuration: Sample Configuration (Auto-Generated by DataMasker Setup Assistant)
- Batch Size: 2,000

The main content area is divided into two sections. On the left, under 'Details', there is a 'Filter Criteria' field. On the right, under 'Field Maskings', there is a table with the following data:

<input type="checkbox"/>	Field	Action	Replace With	Replacing Value
<input checked="" type="checkbox"/>	Asst. Phone (AssistantPhone)	Replace	Pattern - Regex	Phone-Regex(Au...
<input checked="" type="checkbox"/>	Department (Department)	Erase	Random	Auto-Generated
<input checked="" type="checkbox"/>	Email (Email)	Replace	Pattern - Regex	Email-Regex
<input checked="" type="checkbox"/>	First Name (FirstName)	Replace	Pattern - Custom List	First Name-List
<input checked="" type="checkbox"/>	*Last Name (LastName)	Replace	Pattern - Custom List	Last Name-List
<input checked="" type="checkbox"/>	Mailing City (MailingCity)	Replace	Pattern - Custom List	City-List(Slobal)
<input checked="" type="checkbox"/>	Mailing Street (MailingStreet)	Replace	Pattern - Custom List	Street Address-List

Buttons for 'Reset' and 'Save' are visible at the top right of the 'Field Maskings' section.

Update value of field ‘Filter Criteria’

masking_status_C = NULL

Click on the Button ‘Save’

Object Masking

* Select Object

Contact

Description

Filter Criteria ⓘ

masking_status__C = NULL

Advanced Settings

Select Group

Group 1

Sequence

10

Use Bulk Api

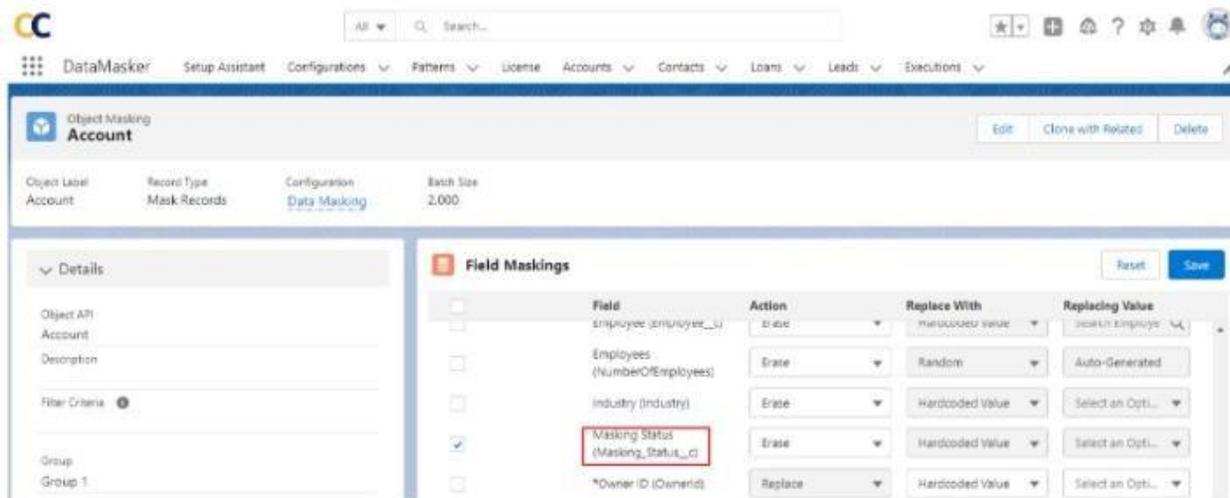
Batch Size ⓘ

2,000

Cancel Save

Add 'Masking Status' to Field Masking

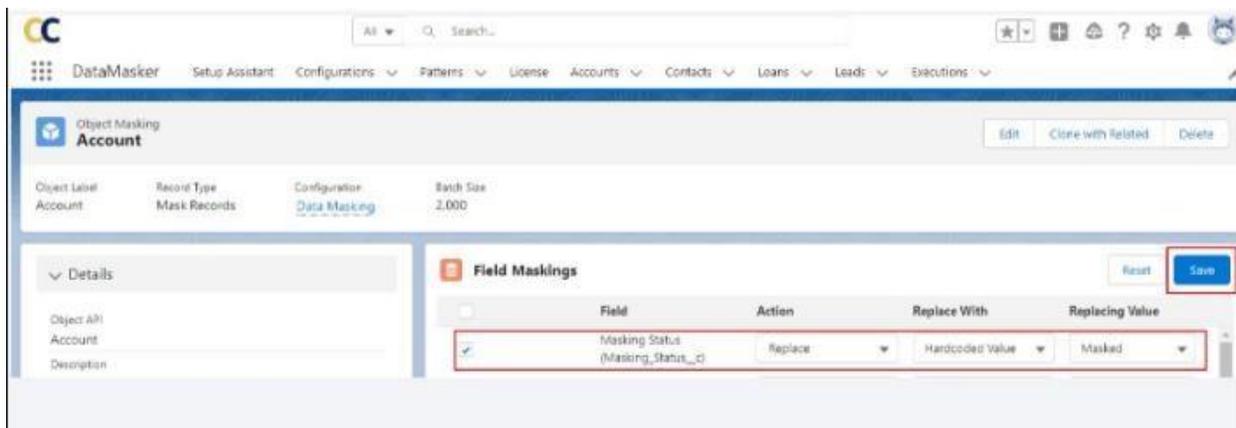
– Click on the button 'New'



Enter details of this new field

- Select Action: ‘Replace’
- Select Further Action: ‘Hardcoded Value’
- Select Field: ‘Masking Status’
- Select Value: ‘Masked’

Click on the button ‘Save’



Masking Status Field should show under Field Maskings as below

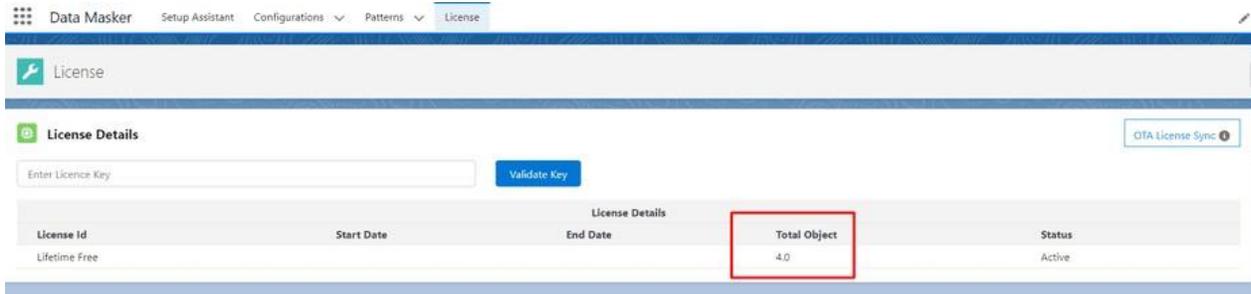
The screenshot shows the DataMasker application interface. At the top, there is a navigation bar with the DataMasker logo and a search bar. Below the navigation bar, the main content area is titled 'Object Masking Account'. On the left, there is a 'Details' section with fields for 'Object API', 'Account', and 'Description'. On the right, there is a 'Field Maskings' table with the following columns: 'Field', 'Action', 'Replace With', and 'Replacing Value'. The table contains one row for 'Masking Status (Masking_Status__c)' with the following values: 'Replace', 'Hardcoded Value', and 'Masked'. There are 'Reset' and 'Save' buttons at the top right of the table.

Field	Action	Replace With	Replacing Value
Masking Status (Masking_Status__c)	Replace	Hardcoded Value	Masked

Repeat adding the custom field 'Masking Status' to all the remaining Objects that are being masked.

Get an Unlimited License (Optional)

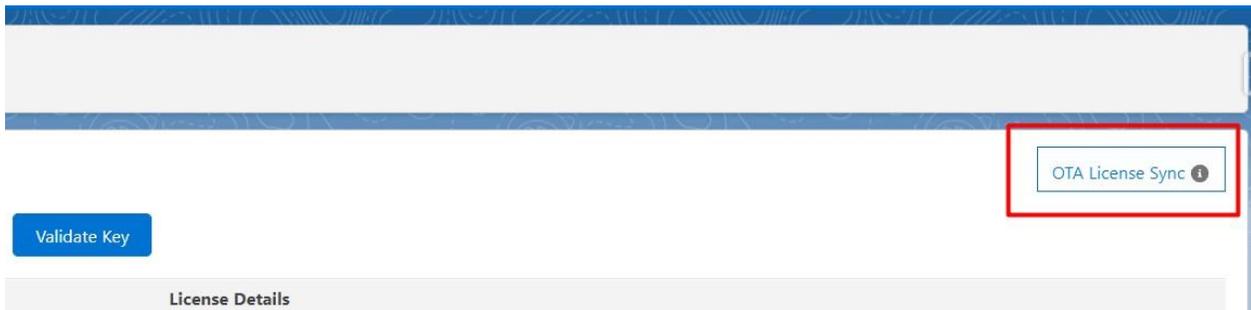
DataMasker offers a complimentary trial period of one month to its users. During this trial, users are able to mask an unlimited number of objects. However, once the trial period comes to an end, the license will expire. When you install the DataMasker application from AppExchange, you'll be able to view the license in the license details section. In order to continue using DataMasker beyond the trial period, users will need to contact info@cloudcompliance.app to obtain the necessary license.



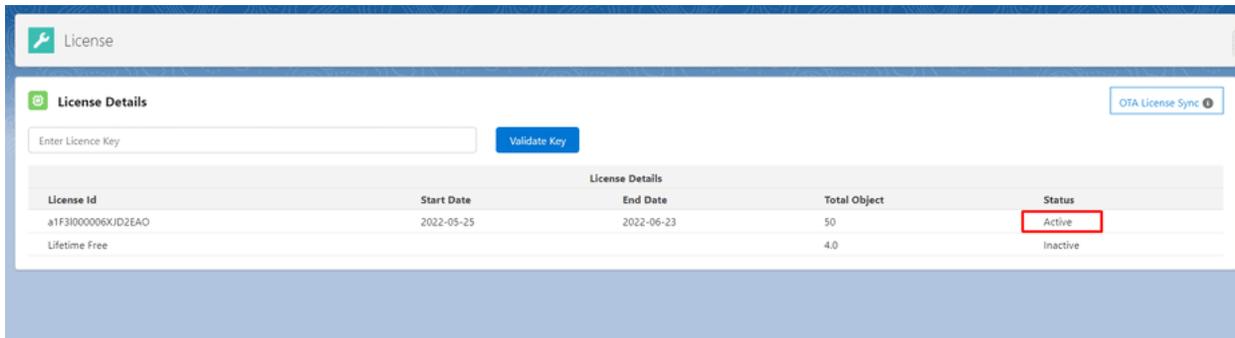
Once you have the Unlimited License, there are two ways to install it on your Salesforce Org.

1. Over The Air Licenses Sync

Prerequisite: You'll have to create a Remote Site URL in your own org. You'll also need to contact Cloud Compliance to ensure that your license has been successfully activated in the Cloud Compliance licensing server. Once the prerequisites have been met, navigate to the 'License' tab, then click 'OTA Licenses Sync'.



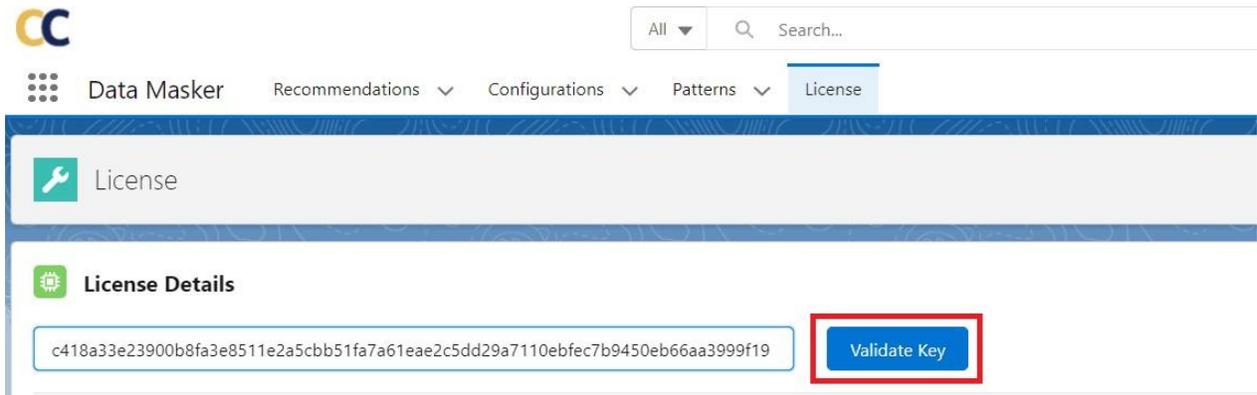
You'll see a license with the status "Active".



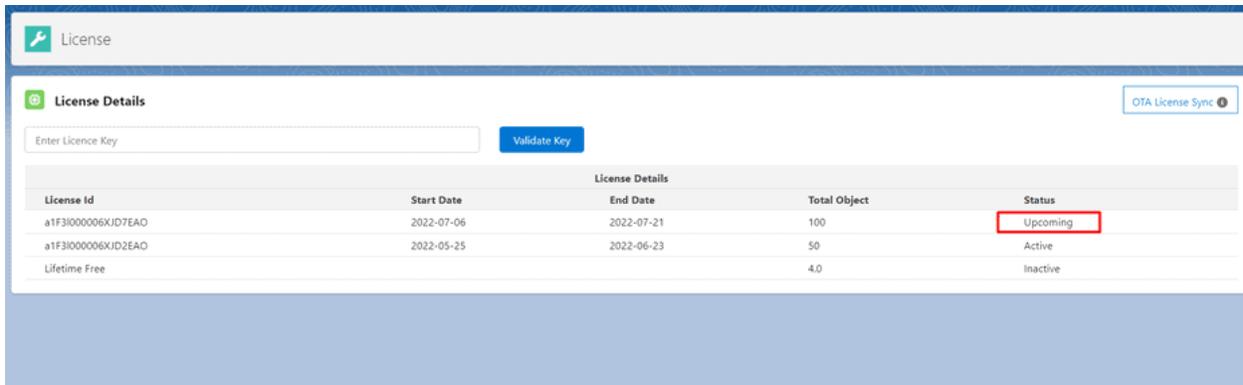
The license start date and end date can be seen in the license detail records.

2. Validate Key

Prerequisite: You'll need to contact Cloud Compliance to receive your Encrypted License Key



Click on the 'License' Tab, then enter the key provided by Cloud Compliance and click on 'Validate Key'. You will see a license record with the status 'Active'. If the Start Date is in the future, then the status will display as 'Upcoming'.



Migration From Salesforce Data Mask To Cloud Compliance DataMasker (Optional)

Migrating from Salesforce Data Mask to DataMasker is simple. We have an Apex script that does the job. The migration process must be executed in the Sandbox org where both Salesforce Data Mask and Cloud Compliance DataMasker are installed. Here are the steps to migrate

1. Create Apex Class

Login to the Salesforce sandbox org where Salesforce Data Mask and Cloud Compliance DataMasker is installed. Navigate to Setup->Custom Code->Apex Classes and click the 'New' button. Copy & Paste the appended code. And save the Apex class.

```
public class DataMaskerMigrationScript {

public static void migrate(){

Set<String> objectsWithNonBulkApi = new Set<String>{'User', 'Attachment'};

Map<String, Schema.SObjectType> schemaMap = Schema.getGlobalDescribe();

Map<String, pcldm_Configuration_c> mapOfSourceIdToConfiguration = new Map<String,
pcldm_Configuration_c>();
for(datamask_DataMask_Configuration_mdt conf : [select id, MasterLabel,
datamask__Anonymize_Case_Comments__c, datamask__Delete_Chatter__c,
datamask__Delete_Email__c,
datamask__Notes__c from datamask_DataMask_Configuration_mdt]){
pcldm_Configuration_c c = new pcldm_Configuration_c();
c.Name = conf.MasterLabel;
c.pcldm_Description_c = 'Automatically imported configuration from SFDC DM.';
c.pcldm_Chatter_c = conf.datamask__Delete_Chatter__c;
c.pcldm_Emails_c = conf.datamask__Delete_Email__c;
if(!mapOfSourceIdToConfiguration.containsKey(conf.Id)){
mapOfSourceIdToConfiguration.put(conf.Id, c);
}
}
}
```

```

if(!mapOfSourceIdToConfiguration.isEmpty()){
insert mapOfSourceIdToConfiguration.values();

Set<String> nonMaskingObjects = new Set<String>();
for(pclm_DM_App_Config_mdt mdt : [SELECT Id, pclm_Value_c FROM
pclm_DM_App_Config_mdt WHERE pclm_Module_Name_c =
'ObjectMaskingUnselectable']){
nonMaskingObjects.add(mdt.pclm_Value__c);
}

Map<String, pclm_Object_Masking_c> mapOfKeyToObjectMasking = new Map<String,
pclm_Object_Masking_c>();
Map<String, Map<String, Schema.SObjectField>> mapOfObjectNameToFieldMap = new Map<String,
Map<String, Schema.SObjectField>>();
for(datamask_Masking_Object_mdt obj : [select id, datamask_API_Name_c,
datamask_DataMask_Configuration_c, datamask_Where_Criteria_LT_c
FROM datamask_Masking_Object_mdt
WHERE datamask_DataMask_Configuration_c IN :mapOfSourceIdToConfiguration.keySet()
AND datamask_API_Name_c NOT IN :nonMaskingObjects]){
String key = obj.datamask_DataMask_Configuration_c + '~' + obj.datamask_API_Name_c;
if(schemaMap.containsKey(obj.datamask_API_Name_c) &&
mapOfSourceIdToConfiguration.containsKey(obj.datamask_DataMask_Configuration_c) &&
!mapOfKeyToObjectMasking.containsKey(key)){
pclm_Object_Masking_c o = new pclm_Object_Masking_c();
o.pclm_Active_c = true;
o.Name = schemaMap.get(obj.datamask_API_Name_c).getDescribe().getLabel();
o.pclm_Batch_Size_c = 2000;
o.pclm_Configuration__c =
mapOfSourceIdToConfiguration.get(obj.datamask_DataMask_Configuration_c).Id;
o.pclm_Filter_Criteria_c = obj.datamask_Where_Criteria_LT_c;
o.pclm_Group__c = '1';
o.pclm__Object_API_c = obj.datamask__API_Name__c;
o.pclm__Object_Label__c = schemaMap.get(obj.datamask__API_Name__c).getDescribe().getLabel();
}
}

```

```

o.pcldm_Sequence_c = 10;
o.pcldm_Use_Bulk_Api_c = true;
o.RecordTypeId =
Schema.SObjectType.pcldm_Object_Masking__c.getRecordTypeInfoByDeveloperName().get('Mask
_Records').getRecordTypeId();
if(objectsWithNonBulkApi.contains(o.pcldm_Object_API_c)){
o.pcldm_Use_Bulk_Api_c = false;
o.pcldm_Batch_Size__c = 200;
}
mapOfKeyToObjectMasking.put(key, o);
if(!mapOfObjectNameTofieldMap.containsKey(o.pcldm_Object_API_c)){
mapOfObjectNameTofieldMap.put(obj.datamask_API_Name_c,
schemaMap.get(obj.datamask_API_Name_c).getDescribe().fields.getMap());
}
}
}
if(!mapOfKeyToObjectMasking.isEmpty()){
insert mapOfKeyToObjectMasking.values();

//map of SF-DM to CC-DM pattern mappings
Map<String, String> mapOfSourceToTargetPattern = new Map<String, String>{
'First Name' => 'First Name-List',
'Last Name' => 'Last Name-List',
'Company Name' => 'Account Name-List',
'Email' => 'Email-Regex',
'Street' => 'Street Address-List',
'City' => 'City-List(US)',
'State' => 'State-List(US)',
'Postal Code' => 'Postal Code-Regex(US)',
'Postal Code (Canada)' => 'Postal Code-Regex(US)',
'Country' => 'Country Name-List',
'Phone N/A' => 'Phone-Regex(US)',
'Social Security No' => 'SSN-Regex(US)',
'Social Security No Values' => 'SSN-Regex(US)',

```

```
'Country (abbr)' => 'Country ISO Code-List',  
'Full Name' => 'First Name-List'  
};
```

```
Map<String, pcldm_Pattern_c> mapOfDmPatternNameToPattern = new Map<String,  
pcldm_Pattern_c>();  
for(pcldm_Pattern_c p : [SELECT Id, Name, pcldm_Type_c FROM pcldm_Pattern_c]){  
mapOfDmPatternNameToPattern.put(p.Name, p);  
}
```

```
List<datamask_Masking_Field__mdt> lstOfFieldMaskings = [SELECT Id,  
datamask_API_Name__c, datamask_Custom_Pattern__c, datamask_Field_Length__c,  
datamask_Field_Type__c, datamask_Masking_Category_c, datamask_Masking_Object_c,  
datamask_Masking_Type_c,  
datamask_Pattern_Data_c, datamask_Required_c, datamask_Unique_c,  
datamask_Masking_Object_r.datamask_API_Name__c,  
datamask_Masking_Object_r.datamask_DataMask_Configuration_c  
FROM datamask_Masking_Field__mdt  
WHERE datamask_Masking_Object__r.datamask__DataMask_Configuration__c IN  
:mapOfSourceIdToConfiguration.keySet()  
AND datamask_Masking_Object__r.datamask__API_Name__c != 'User'];
```

```
Map<String, pcldm_Pattern_c> mapOfPatternsToInsert = new Map<String, pcldm_Pattern_c>();  
for(datamask_Masking_Field__mdt fm : lstOfFieldMaskings){  
if(fm.datamask_Masking_Type_c == 'Patternize' &&  
String.isNotBlank(fm.datamask_Custom_Pattern__c) &&  
!mapOfDmPatternNameToPattern.containsKey(fm.datamask_Custom_Pattern__c)){  
pcldm_Pattern_c p = new pcldm_Pattern_c();  
p.Name = fm.datamask__Custom_Pattern__c;  
p.RecordTypeId =  
Schema.SObjectType.pcldm_Pattern_c.getRecordTypeInfoByDeveloperName().get('Regex').getRe  
cordTypeId();  
p.pcldm_Data_Type__c = 'Text';  
p.pcldm_Type__c = 'Regex';
```

```

p.pcldm_Value_c = parsePattern(fm.datamask__Custom_Pattern_c);
mapOfPatternsToInsert.put(p.name, p);
}
}
if(!mapOfPatternsToInsert.isEmpty()){
insert mapOfPatternsToInsert.values();

for(pcldm_Pattern_c p : mapOfPatternsToInsert.values()){
mapOfDmPatternNameToPattern.put(p.Name, p);
}
}

List<pcldm_Field_Masking_c> lstOfFieldMaskingToInsert = new
List<pcldm_Field_Masking_c>();
for(datamask_Masking_Field_mdt fm : lstOfFieldMaskings){
String key =
fm.datamask_Masking_Object_r.datamask_DataMask_Configuration_c+'~'+fm.datamask_Maski
ng_Object_r.datamask__API_Name_c;
if(mapOfKeyToObjectMasking.containsKey(key) &&
mapOfObjectNameToFieldMap.containsKey(fm.datamask_Masking_Object__r.datamask__API_Nam
e_c)){
Map<String, Schema.SObjectField> mapOffieldDescribes =
mapOfObjectNameToFieldMap.get(fm.datamask_Masking_Object_r.datamask_API_Name_c);
if(mapOffieldDescribes.containsKey(fm.datamask__API_Name__c)){
Schema.DescribeFieldResult dfield =
mapOffieldDescribes.get(fm.datamask_API_Name_c).getDescribe();
pcldm_Field_Masking__c f = new pcldm_Field_Masking__c();
f.pcldm_Active_c = true;
f.pcldm_Field_API_c = fm.datamask_API_Name_c;
f.pcldm_Field_Label_c = dfield.getLabel();
f.Name = dfield.getLabel();
f.pcldm_Field_Type_c = String.valueOf(dfield.getType());

```

```

f.pclDm_Unique__c = false;
f.pclDm_Object_Masking__c = mapOfKeyToObjectMasking.get(key).Id;
if((f.pclDm_Field_Type_c == 'TEXTAREA' || f.pclDm_Field_Type_c == 'STRING') &&
fm.datamask_Unique_c){
f.pclDm_Unique__c = true;
}
f.pclDm_Action__c = 'Replace';
if(fm.datamask_Masking_Type_c == 'Delete'){
f.pclDm_Action_c = 'Erase';
}else if(fm.datamask_Masking_Type_c == 'Anonymize'){
f.pclDm_Further_Action_c = 'Random';
f.pclDm_Value__c = 'Auto-Generated';
}else if(fm.datamask_Masking_Type_c == 'Patternize'){
if(String.isNotBlank(fm.datamask_Custom_Pattern_c) &&
mapOfDmPatternNameToPattern.containsKey(fm.datamask_Custom_Pattern_c)){
pclDm_Pattern_c ptrn = mapOfDmPatternNameToPattern.get(fm.datamask_Custom_Pattern_c);
f.pclDm_Further_Action_c = 'Pattern - '+ptrn.pclDm_Type_c;
f.pclDm_Pattern_c = ptrn.Id;
f.pclDm_Value_c = ptrn.Name;
}else{
f.pclDm_Further_Action_c = 'Random';
f.pclDm_Value_c = 'Auto-Generated';
}
}else{
if(String.isNotBlank(fm.datamask_Masking_Category_c) &&
mapOfSourceToTargetPattern.containsKey(fm.datamask_Masking_Category_c)){
String dmPattern = mapOfSourceToTargetPattern.get(fm.datamask_Masking_Category_c);
if(String.isNotBlank(dmPattern) && mapOfDmPatternNameToPattern.containsKey(dmPattern)){
pclDm_Pattern_c ptrn = mapOfDmPatternNameToPattern.get(dmPattern);
f.pclDm_Further_Action_c = 'Pattern - '+ptrn.pclDm_Type_c;
f.pclDm_Pattern_c = ptrn.Id;
f.pclDm_Value__c = ptrn.Name;
}else{
f.pclDm_Further_Action__c = 'Random';
}
}
}

```

```
f.pcldm_Value__c = 'Auto-Generated';
}
}else{
f.pcldm_Further_Action_c = 'Random';
f.pcldm_Value_c = 'Auto-Generated';
}
}
lstOfFieldMaskingToInsert.add(f);
}
}
}
```

```
List<pcldm_Object_Masking_c> lst = [select id FROM pcldm_Object_Masking_c WHERE
pcldm_object_Api_c = 'User'
```

```
AND Id IN :mapOfKeyToObjectMasking.values());
```

```
if(lst != null && !lst.isEmpty()){
```

```
for(pcldm_Object_Masking__c obj : lst){
```

```
pcldm_Field_Masking__c f = new pcldm_Field_Masking_c();
```

```
f.pcldm_Active_c = true;
```

```
f.pcldm_Field_API_c = 'isActive';
```

```
f.pcldm_Field_Label_c = 'Active';
```

```
f.Name = 'Active';
```

```
f.pcldm_Field_Type_c = 'BOOLEAN';
```

```
f.pcldm_Unique_c = false;
```

```
f.pcldm_Object_Masking_c = obj.Id;
```

```
f.pcldm_Action_c = 'Replace';
```

```
f.pcldm_Further_Action_c = 'Hardcoded Text';
```

```
f.pcldm_Value_c = 'false';
```

```
lstOfFieldMaskingToInsert.add(f);
```

```
}
```

```
}
```

```
if(!lstOfFieldMaskingToInsert.isEmpty()){
```

```
insert lstOfFieldMaskingToInsert;
```

```

}
}
}
}

public static String parsePattern(String pattern){
while(pattern.containsIgnoreCase('%')){
pattern = pattern.replace('%', '[percent]');
}
String currentPattern = "";
Boolean patternRunning = false;
for(Integer i = 0; i < pattern.length(); i++){
String currentChar = pattern.substring(i, i+1);
if(currentChar == '%'){
patternRunning = true;
}else if(currentChar == 'd' && patternRunning){
patternRunning = false;
String randomInt = '[1-9]{'+Integer.valueOf(currentPattern)+'}';
pattern = pattern.substring(0, (i-1-currentPattern.length()))+randomInt+pattern.substring(i+1,
pattern.length());
currentPattern = "";
}else if(currentChar == 'c' && patternRunning){
patternRunning = false;
String randomStr = '[a-z]{'+Integer.valueOf(currentPattern)+'}';
pattern = pattern.substring(0, (i-1-currentPattern.length()))+randomStr+pattern.substring(i+1,
pattern.length());
currentPattern = "";
}else if(patternRunning){
currentPattern += currentChar;
}
}
while(pattern.containsIgnoreCase('[percent]')){
pattern = pattern.replace('[percent]', '%');
}
}

```

```
return pattern;
```

```
}
```

```
}
```

2. Run Execute Anonymous

Navigate to the developer console. Select Debug->Open Execute Anonymous Window. Copy & Paste the appended code and hit the 'Execute' Button

```
DataMaskerMigrationScript.migrate();
```

3. Verify the Migrated Configuration

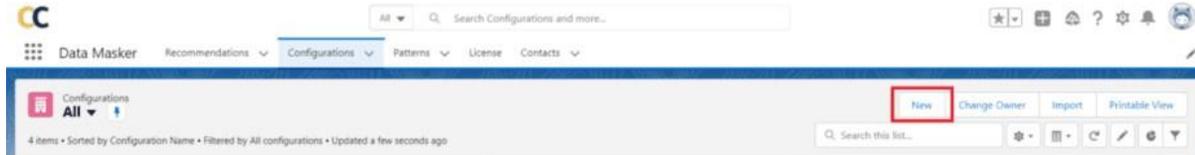
The migration script will create a new configuration in DataMasker, the name of this configuration will be the same as the one in Salesforce Data Mask. Verify this configuration and if it looks good, you are ready to test masking your sandbox.

Configure Masking Mapping

Create Masking Configuration

To add objects and fields for the masking process, you'll need to create at least one Configuration.

Step 1: Navigate to the 'Configuration' tab. Click on 'New'.



Step 2: Enter a configuration name. We also recommend entering a description, but this is optional.

You will also see the 'Retry Count' field on this screen. It is used to repeat the execution of DataMasker if an error has occurred while processing. It is a numeric field with an initial value of 0. If all the records are processed successfully and the status displays as "Completed" in the first execution, no additional executions will be performed. Retry Execution also gets updated in the current execution, no new execution will be created.

Step 3: Check all of the boxes in the 'Delete Settings' section. [If you select any activity in 'Delete Settings', the records of that activity will be deleted after the data masking execution completes.]

After setting up all Delete Settings, click on 'Save'.

New Configuration

Configuration Name ⓘ

Configuration Id ⓘ

Description ⓘ

Retry Count ⓘ

Delete Settings

Attachments & Files ⓘ

Events ⓘ

Notes ⓘ

Tasks ⓘ

Chatter ⓘ

Emails ⓘ

Case Comments ⓘ

Notify Users ⓘ

Activate Users ⓘ

Advanced Configuration

The 'Advanced Configuration' section offers two distinct features: 'Notify Users' and 'Activate Users'.

Advanced Settings

Configuration Id ⓘ

Retry Count

Notify Users ⓘ

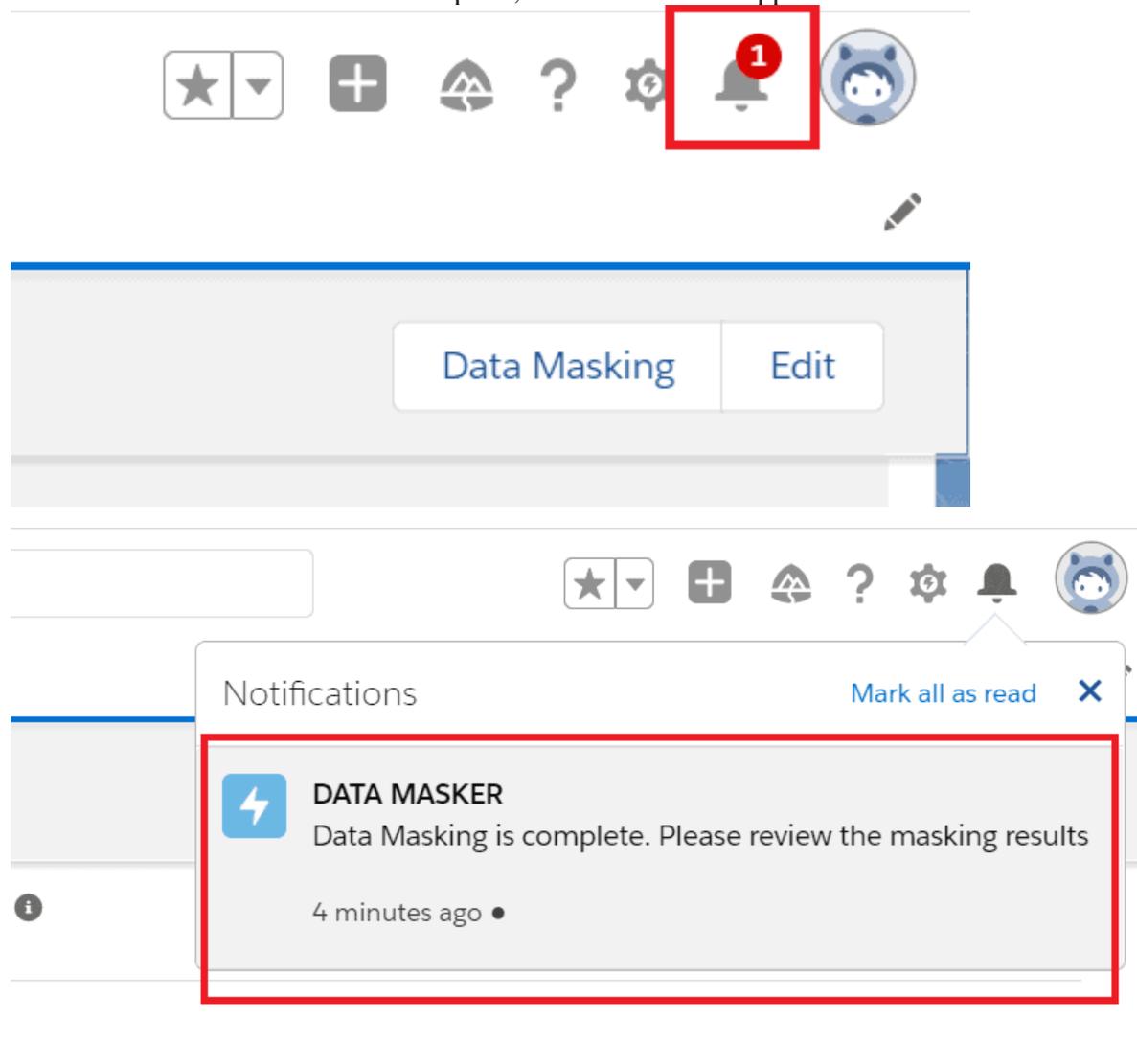
Activate Users ⓘ

1. Notify Users:-

The 'Notify Users' feature allows users to get notifications after the successful execution of a masking batch. Simply add the username of any user who should be notified.

To add multiple usernames, separate each username with a comma.

- After batch execution is complete, notifications will appear at the bell icon.



2. Activate User:-

When you create, refresh, or clone a sandbox, user email addresses are modified in your sandbox so that production users don't receive automatically generated email messages from the sandbox. In your modified sandbox, user email addresses will now be appended with ".invalid". If you want to activate these users, you need to input the user's Email ID here. As a result, the ".invalid" is removed.

Advanced Settings

Configuration Id ⓘ

Retry Count

Notify Users ⓘ

Activate Users ⓘ

Cancel Save & New Save

3. Retry Count:-

Whenever any execution log errors out or the execution contains error records then those records will be retried again. The Retry Count will be specified in this field.

It should be more than 0. The retry frequency will be defined based on the count mentioned in this field. For e.g. If Retry Count is 1, and the main execution contains an error record or any of the execution logs shows the status as Errored, then it will be retried once.

Advanced Settings

Configuration Id ⓘ

Retry Count

Notify Users ⓘ

Activate Users ⓘ

Cancel Save & New Save

Specify Object & Field Masking

Overview :

To achieve scalability and high performance, you can split records of the same objects into different chunks.

For example, the Contact object contains 18 million records distributed evenly over three years. Suppose we then decide to split the Contact object into three unique mappings – this means that each mapping will now have six million records. This split allows the processing of all three batches of six million records simultaneously instead of processing one contact masking batch containing all 18 million records.

Solution :

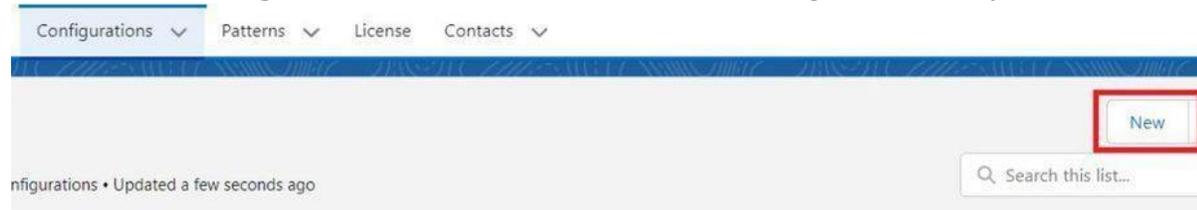
After the creation of the Configuration record, you need to add objects and fields to the object masking and field masking records.

The following steps cover how to create these object-masking and field-masking records.

Object Masking

Step 1: Navigate to the ‘Configuration’ tab

Click on the ‘Configuration’. You will now see all of the configurations that you have created.

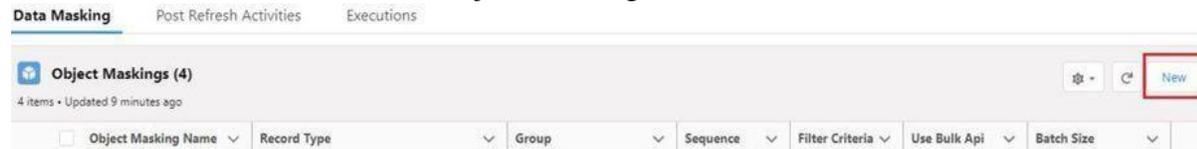


Step 2: Navigate to the ‘Object Masking’ section

Click on any configuration record and scroll down to the ‘Object Masking’ section.

Step 3: Create an Object Masking record

Click the ‘New’ button to add an Object Masking record.



You will then be prompted to select a record type: ‘Delete Records’ or ‘Mask Records’

Delete Records: If you want to delete records, select the ‘Delete Records’ button and click ‘Next’. By doing this, the Delete Records Page Layout will display.

New Object Masking

Select a record type

- Delete Records
Use this Record type if you want to Delete the records of the Object
- Mask Records
Use this Record type if you want to Replace or Erase field values of the Object

Cancel

Next

Mask Records: If you want to mask records, then select the “Mask Records” radio button. By clicking on this, the Mask Records Page Layout will display.

New Object Masking

Select a record type

- Delete Records
Use this Record type if you want to Delete the records of the Object
- Mask Records
Use this Record type if you want to Replace or Erase field values of the Object

Cancel

Next

Select an Object and determine Group, Sequence, Batch Size, and Filter Criteria, then select the ‘Use Bulk API’ checkbox. This allows you to process records in bulk and improve masking performance.

New Object Masking

Select Object

Account

Select Group

Group 1

Sequence

10

Use Bulk Api



Batch Size ⓘ

2,000

Filter Criteria ⓘ

e.g FirstName = 'John'

Save

Cancel

- **Group**

The Group criteria decide on masking priority. That means objects that are added in Group 1 will be masked first, followed by objects in Group 2, and so on up to Group 10. You can add an unlimited amount of objects in a single Group and put Standard as well as Custom Objects in the same Group or a different Group

- **Sequence**

The Sequence criteria work within different Groups. The Sequence criteria allow you to decide the priority for an object to be masked within a Group. For example – an object which has a Sequence value of 1 will be masked first, and so on for an infinite number of values. Manually, you may set as many sequences in a single group on both Standard and Custom Objects.

- **Batch size**

The Batch Size determines the number of records that should be processed in a single batch. You can set it from a minimum value of 1 to a maximum of 2000 records.

- **Filter Criteria**

You can use the Filter Criteria to filter records based on your own criteria. Everything that can fit into the SOQL WHERE clause can also fit into the Filter Criteria. Logical operators, Literals, LIMIT, and others can be utilized.

Here's an example of how to mask all active Contacts with the record type of 'Partner' and where the Partner is based in the 'United Kingdom'.

The screenshot shows a web interface titled "Object Masking". It contains the following elements:

- A dropdown menu labeled "* Select Object" with "Contact" selected.
- A text input field labeled "Description" containing "All Active Partner Contacts from UK".
- A section labeled "Filter Criteria" with an information icon. It contains a text area with the following SQL-like filter criteria:

```
Active__C=True  
AND RecordTypeID='012DE000005dpS6YAI'  
AND Account.BillingCountry='United Kingdom'
```
- A green circular refresh icon in the bottom right corner of the filter criteria text area.
- A link labeled "> Advanced Settings".
- At the bottom right, there are two buttons: "Cancel" and "Save".

Step 4: Save your changes

Click on 'Save'. Likewise, you can create multiple records of object masking with different groups and sequences.

Object Maskings (4)
4 items • Updated a few seconds ago

<input type="checkbox"/>	Object Masking Name	Record Type	Group	Sequence
1	Case	Mask Records	Group 1	2
2	Account	Mask Records	Group 1	1
3	Asset	Mask Records	Group 2	1
4	Contact	Mask Records	Group 3	1

Field Masking

Step 4.1: Pick an Object

Click on the Object name for which the user wants to add Field masking. You will be redirected to the field masking component which allows adding multiple fields simultaneously.

Data Masking | Post Refresh Activities | Executions

Object Maskings (4)
4 items • Updated 10 minutes ago

<input type="checkbox"/>	Object Masking Name	Record Type	Group	Sequence
1	Case	Mask Records	Group 1	2
2	Account	Mask Records	Group 1	1
3	Asset	Mask Records	Group 2	1
4	Contact	Mask Records	Group 3	1

Step 4.2: Choose Fields

Here users can select multiple fields at a time. Also, the user can specify the action which needs to be implemented for masking the field. To achieve this user needs to select the fields by clicking the checkbox. Then further select 'Action', 'Replace with', and 'Replacing Value'.

Field Maskings |

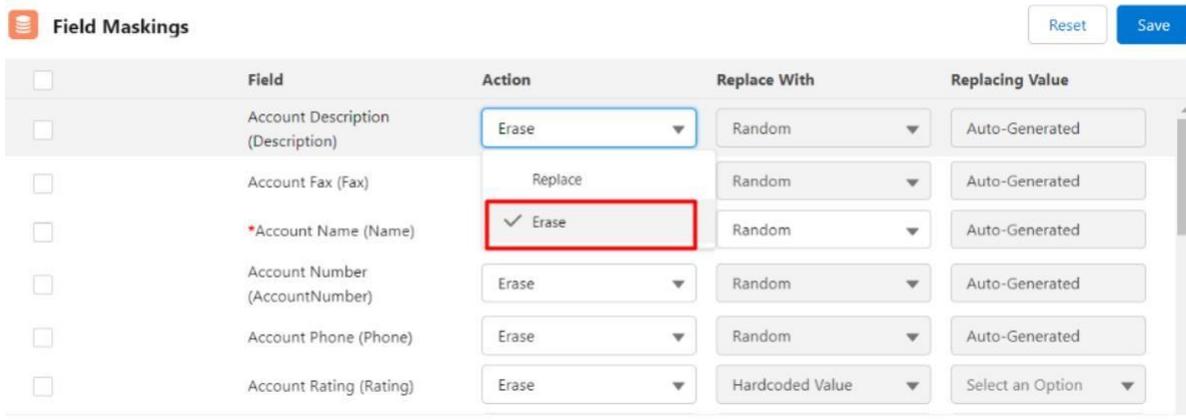
<input type="checkbox"/>	Field	Action	Replace With	Replacing Value
<input type="checkbox"/>	Account Description (Description)	Erase	Random	Auto-Generated
<input type="checkbox"/>	Account Fax (Fax)	Erase	Random	Auto-Generated
<input type="checkbox"/>	*Account Name (Name)	Replace	Random	Auto-Generated
<input type="checkbox"/>	Account Number (AccountNumber)	Erase	Random	Auto-Generated
<input type="checkbox"/>	Account Phone (Phone)	Erase	Random	Auto-Generated
<input type="checkbox"/>	Account Rating (Rating)	Erase	Hardcoded Value	Select an Option

Actions: – User can select two actions by clicking the dropdown –

1. Erase: To erase the field values.
2. Replace: To replace the field values with another value from the option provided by DataMasker.

If you select Erase, select the field from the dropdown list and click 'Save'. This function is used to erase the field (e.g. name, number, email, address, etc.)

Note – Never add mandatory fields under erase action.



The screenshot shows the 'Field Maskings' configuration page. It features a table with columns for 'Field', 'Action', 'Replace With', and 'Replacing Value'. The 'Account Name (Name)' row is highlighted with a red box around the 'Erase' action dropdown. Other rows include 'Account Description (Description)', 'Account Fax (Fax)', 'Account Number (AccountNumber)', 'Account Phone (Phone)', and 'Account Rating (Rating)'. The 'Replace With' dropdowns are set to 'Random' for most fields, and 'Hardcoded Value' for 'Account Rating (Rating)'. The 'Replacing Value' column is set to 'Auto-Generated' for most fields and 'Select an Option' for 'Account Rating (Rating)'. 'Reset' and 'Save' buttons are located at the top right.

Field	Action	Replace With	Replacing Value
Account Description (Description)	Erase	Random	Auto-Generated
Account Fax (Fax)	Replace	Random	Auto-Generated
*Account Name (Name)	Erase	Random	Auto-Generated
Account Number (AccountNumber)	Erase	Random	Auto-Generated
Account Phone (Phone)	Erase	Random	Auto-Generated
Account Rating (Rating)	Erase	Hardcoded Value	Select an Option

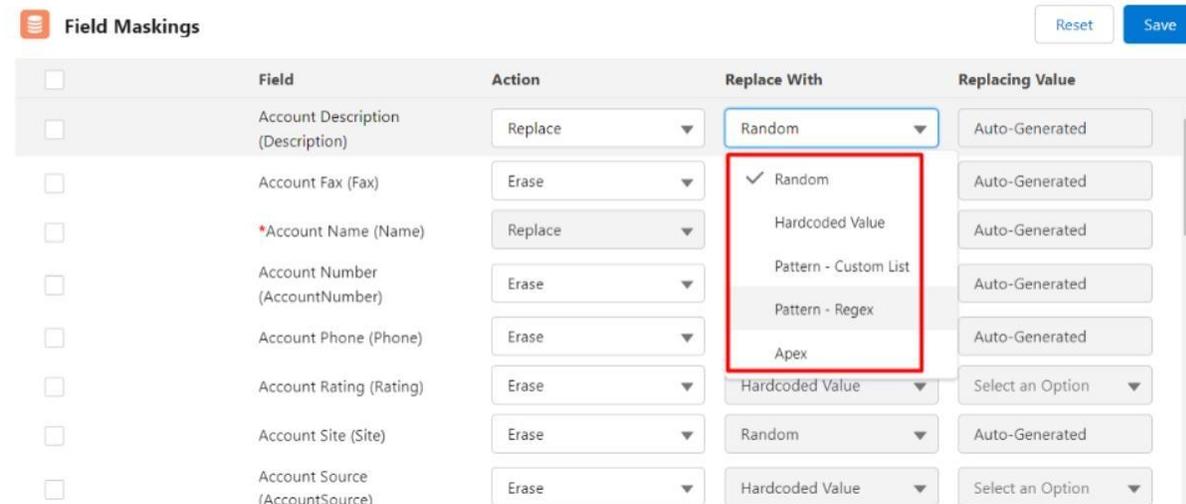
If you select Replace, select one of the following further actions:

I. Random: Replace with randomized (autogenerated) text/string.

II. Hardcoded: Replace with a hardcoded string.

III. Pattern: Replace with a custom list or Regex.

IV. Apex: Replace with specific characters.



The screenshot shows the 'Field Maskings' configuration page with the 'Account Description (Description)' row selected. The 'Action' dropdown is set to 'Replace', and the 'Replace With' dropdown is open, showing options: 'Random' (checked), 'Hardcoded Value', 'Pattern - Custom List', 'Pattern - Regex', and 'Apex'. The 'Replacing Value' column is set to 'Auto-Generated' for most fields and 'Select an Option' for 'Account Rating (Rating)'. 'Reset' and 'Save' buttons are located at the top right.

Field	Action	Replace With	Replacing Value
Account Description (Description)	Replace	Random	Auto-Generated
Account Fax (Fax)	Erase	Random	Auto-Generated
*Account Name (Name)	Replace	Random	Auto-Generated
Account Number (AccountNumber)	Erase	Random	Auto-Generated
Account Phone (Phone)	Erase	Random	Auto-Generated
Account Rating (Rating)	Erase	Hardcoded Value	Select an Option
Account Site (Site)	Erase	Random	Auto-Generated
Account Source (AccountSource)	Erase	Hardcoded Value	Select an Option

Hardcoded Value: Hardcoded values are values where you can add any hardcoded text/string to replace the actual value with chosen one.

Select the field where you want to apply masking to and click 'Save'. Repeat this until desired field maskings are set up.

Field Maskings Reset Save

<input type="checkbox"/>	Field	Action	Replace With	Replacing Value
<input checked="" type="checkbox"/>	Account Description (Description)	Replace	Hardcoded Value	<input type="text"/>
<input type="checkbox"/>	Account Fax (Fax)	Erase	Random	Auto-Generated
<input type="checkbox"/>	*Account Name (Name)	Replace	Random	Auto-Generated
<input type="checkbox"/>	Account Number (AccountNumber)	Erase	Random	Auto-Generated
<input type="checkbox"/>	Account Phone (Phone)	Erase	Random	Auto-Generated

Enter any String in the 'Enter Value' textbox field by which you want to hardcode the selected field. Make sure the value entered in the textbox is of the same data type of the field selected for masking.

In the following example, the output of the Account Description will be Hardcoded Value.

Field Maskings Reset Save

<input type="checkbox"/>	Field	Action	Replace With	Replacing Value
<input checked="" type="checkbox"/>	Account Description (Description)	Replace	Hardcoded Value	Hardcoded Value
<input type="checkbox"/>	Account Fax (Fax)	Erase	Random	Auto-Generated
<input type="checkbox"/>	*Account Name (Name)	Replace	Random	Auto-Generated
<input type="checkbox"/>	Account Number (AccountNumber)	Erase	Random	Auto-Generated
<input type="checkbox"/>	Account Phone (Phone)	Erase	Random	Auto-Generated

A Pattern – Custom List: – While selecting 'Pattern – Custom List' from further actions,

choose the value by which you want to replace the selected field by using patterns.

A Pattern – Custom List can be any combination of items or names from the default list or the lists created by the users.

Field Maskings Reset Save

<input type="checkbox"/>	Field	Action	Replace With	Replacing Value
<input type="checkbox"/>	Account ID (Accountid)	Erase	Hardcoded Value	Search Accounts... <input type="text"/>
<input checked="" type="checkbox"/>	Assistant's Name (AssistantName)	Replace	Pattern - Custom List	<input type="text" value="Pattern - Custom ..."/> <ul style="list-style-type: none"> Account Name-List City-List(Global) City-List(US) Country ISO Code-List Country Name-List First Name-List Last Name-List State-List(US)
<input type="checkbox"/>	Asst. Phone (AssistantPhone)	Erase	Random	Auto-Generated
<input type="checkbox"/>	Birthdate (Birthdate)	Erase	Random	Auto-Generated
<input type="checkbox"/>	Business Fax (Fax)	Erase	Random	Auto-Generated
<input type="checkbox"/>	Business Phone (Phone)	Erase	Random	Auto-Generated
<input type="checkbox"/>	CC_CurrencyField (CC_CurrencyField_c)	Erase	Random	Auto-Generated
<input type="checkbox"/>	CC_DateField (CC_DateField_c)	Erase	Random	Auto-Generated
<input type="checkbox"/>	CC_DateTimeField (CC_DateTimeField_c)	Erase	Random	Auto-Generated

Pattern – Regex:- While Selecting ‘Pattern – Regex’ from further actions, choose the value by which you want to replace the selected field by using patterns from your sandbox (e.g. email, phone number, etc.).

The screenshot shows the 'Field Maskings' configuration page. The 'Asst. Phone (AssistantPhone)' row is selected, and the 'Replace With' dropdown is set to 'Pattern - Regex'. The 'Replacing Value' dropdown is also set to 'Pattern - Regex', and its menu is open, showing options like 'Phone-Regex(Australia)', 'Phone-Regex(Brazil)', 'Phone-Regex(UK)', and 'Phone-Regex(US)'. A red box highlights the selected row and the open dropdown menu.

Field	Action	Replace With	Replacing Value
Account ID (AccountId)	Erase	Hardcoded Value	Search Accounts...
Assistant's Name (AssistantName)	Replace	Random	Auto-Generated
<input checked="" type="checkbox"/> Asst. Phone (AssistantPhone)	Replace	Pattern - Regex	Pattern - Regex
Birthdate (Birthdate)	Erase	Random	Phone-Regex(Australia)
Business Fax (Fax)	Erase	Random	Phone-Regex(Brazil)
Business Phone (Phone)	Erase	Random	Phone-Regex(UK)
CC_CurrencyField (CC_CurrencyField__c)	Erase	Random	Phone-Regex(US)
CC_DateField (CC_DateField__c)	Erase	Random	Auto-Generated
CC_DateTimeField (CC_DateTimeField__c)	Erase	Random	Auto-Generated

You can also **add your own Masking Pattern.**

Random:- While selecting ‘Random’ from further actions, choose the field by which you want to replace the selected field with a Random text/string.

The screenshot shows the 'Field Maskings' configuration page. The 'Asst. Phone (AssistantPhone)' row is selected, and the 'Replace With' dropdown is set to 'Random'. The 'Replacing Value' dropdown is also set to 'Random', and its menu is open, showing options like 'Random', 'Hardcoded Value', 'Pattern - Custom List', 'Pattern - Regex', and 'Apex'. A red box highlights the selected row and the open dropdown menu.

Field	Action	Replace With	Replacing Value
Account ID (AccountId)	Erase	Hardcoded Value	Search Accounts...
Assistant's Name (AssistantName)	Replace	Random	Auto-Generated
<input checked="" type="checkbox"/> Asst. Phone (AssistantPhone)	Replace	Random	Auto-Generated
Birthdate (Birthdate)	Erase	Random	Auto-Generated
Business Fax (Fax)	Erase	Hardcoded Value	Auto-Generated
Business Phone (Phone)	Erase	Pattern - Custom List	Auto-Generated
CC_CurrencyField (CC_CurrencyField__c)	Erase	Pattern - Regex	Auto-Generated
CC_DateField (CC_DateField__c)	Erase	Apex	Auto-Generated
CC_DateTimeField (CC_DateTimeField__c)	Erase	Random	Auto-Generated

Apex:- While selecting ‘Apex’ from further actions, choose the field by which you want to replace the selected field with Apex texts/strings. For more information about **Apex text strings**, [read this article](#).

The top screenshot shows the 'Field Maskings' configuration interface. The table below represents the data shown in the interface:

Field	Action	Replace With	Replacing Value
Account ID (AccountId)	Erase	Hardcoded Value	Search Accounts...
<input checked="" type="checkbox"/> Assistant's Name (AssistantName)	Replace	Apex	Apex class name
Asst. Phone (AssistantPhone)	Replace	Random	Auto-Generated
Birthdate (Birthdate)	Erase	Hardcoded Value	Auto-Generated
Business Fax (Fax)	Erase	Pattern - Custom List	Auto-Generated
Business Phone (Phone)	Erase	Pattern - Regex	Auto-Generated
CC_CurrencyField (CC_CurrencyField_c)	Erase	Random	Auto-Generated

The bottom screenshot shows the 'Field Maskings' configuration interface with the 'Assistant's Name' field selected. The 'Replacing Value' field is set to 'DM_OfbuscationCustomV1'.

Field	Action	Replace With	Replacing Value
Account ID (AccountId)	Erase	Hardcoded Value	Search Accounts...
<input checked="" type="checkbox"/> Assistant's Name (AssistantName)	Replace	Apex	DM_OfbuscationCusto
Asst. Phone (AssistantPhone)	Replace	Random	Auto-Generated
Birthdate (Birthdate)	Erase	Random	Auto-Generated
Business Fax (Fax)	Erase	Random	Auto-Generated

After adding all fields, you can see a list of your field masking, as shown.

The screenshot shows the 'Field Maskings' configuration interface with the following table:

Field	Action	Replace With	Replacing Value
<input checked="" type="checkbox"/> Assistant's Name (AssistantName)	Replace	Apex	DM_OfbuscationCusto
<input checked="" type="checkbox"/> Asst. Phone (AssistantPhone)	Replace	Pattern - Regex	Phone-Regex(UK)
<input checked="" type="checkbox"/> Birthdate (Birthdate)	Replace	Hardcoded Value	Jul 5, 1978
<input checked="" type="checkbox"/> Business Fax (Fax)	Erase	Random	Auto-Generated
<input checked="" type="checkbox"/> Business Phone (Phone)	Erase	Random	Auto-Generated
<input type="checkbox"/> Account ID (AccountId)	Erase	Hardcoded Value	Search Accounts...

Formula Field:- The action 'Formula Field' is used to mask the records by formula field return values. Users can enter the API name of the Formula Field at the value in the Field Masking. Initially, after post-install the action 'Formula Field' is hidden from the Data Masker field masking.

To use this action refer to the article – [Data Masking by Formula Field](#).

Unique Checkbox– Unique functionality is used to create unique values for each field value that has been added to the field masking. Users can check the Unique checkbox in the Field Masking component to create unique values and after masking, the Data Masker will append the ID of that record next to the value.

Note – User can create Unique values for the fields with Text and Text area data types only.

<input type="checkbox"/>	Field	Action	Replace With	Replacing Value	Unique
<input checked="" type="checkbox"/>	Account Description (Description)	Replace	Random	Auto-Generated	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	*Account Name (Name)	Replace	Hardcoded Value	Masked	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Account Phone (Phone)	Replace	Pattern - Regex	Phone-Regex(US)	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Billing City (BillingCity)	Replace	Pattern - Custom ...	City-List(Global)	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Billing Street (BillingStreet)	Replace	Pattern - Custom ...	Street Address-List	<input type="checkbox"/>

After Masking with Unique Checkbox, the record value will append the Record Id along with the value mapped by 'Replace With' action that makes the record value unique.

Query Results

Returned records 1 - 200 of 1003 total records in 1.000 seconds:

More...	AccountNumber	Description	Name	pcdm__CC_long_text_area__c	pcdm__CC_Rich_Text__c	Site
1	3276 3771 37710013h00001mezcMAAQ	02b3ba76b19e1bf8822ad63ce9c1d9e0013h00001mezcMAAQ	Masked0013h00001mezcMAAQ	Cachare!_Updated0013h00001mezcMAAQ	1301 Greene Street0013h00001mezcMAAQ	Euclid0013h00001mezcMAAQ
2	8886 3496 34960013h00001mezcNAAQ	504488318b40c71350e3aeffd8bf38920013h00001mezcNAAQ	Masked0013h00001mezcNAAQ	Donato_Updated0013h00001mezcNAAQ	300 E 3rd St0013h00001mezcNAAQ	Pukwana0013h00001mezcNAAQ
3	7883 4091 40910013h00001mezcOAAQ	25e884f72052efa41b432fa65e9cd7060013h00001mezcOAAQ	Masked0013h00001mezcOAAQ	Mozes_Updated0013h00001mezcOAAQ	105 Amity Way0013h00001mezcOAAQ	Hudson0013h00001mezcOAAQ
4	6844 5928 54280013h00001mezcPAAQ	881867500f18e29e7cd3d6eac0fb7ada0013h00001mezcPAAQ	Masked0013h00001mezcPAAQ	Sujit_Updated0013h00001mezcPAAQ	2300 4th Ave0013h00001mezcPAAQ	Kimberly0013h00001mezcPAAQ
5	6968 4694 46940013h00001mezcQAAQ	25f87f4c5d99d0b79172ed87dbb175f0013h00001mezcQAAQ	Masked0013h00001mezcQAAQ	Traci_Updated0013h00001mezcQAAQ	337 Brightseat Road0013h00001mezcQAAQ	Welaka0013h00001mezcQAAQ
6	4826 0615 06150013h00001mezcRAAQ	9358ade516fd8cc6ba2b6f627f425660013h00001mezcRAAQ	Masked0013h00001mezcRAAQ	Saleem_Updated0013h00001mezcRAAQ	158 N Scott Street0013h00001mezcRAAQ	Radom0013h00001mezcRAAQ
7	2777 7768 77680013h00001mezcSAAQ	52a4dd725d57a96b61e8c3c9242ad1d90013h00001mezcSAAQ	Masked0013h00001mezcSAAQ	Elke_Updated0013h00001mezcSAAQ	1207 Network Centre Dr0013h00001mezcSAAQ	Manville0013h00001mezcSAAQ
8	8662 4177 41770013h00001mezcTAAQ	96037d5465e09b7ccf0ba7e52c025c70013h00001mezcTAAQ	Masked0013h00001mezcTAAQ	Sadé_Updated0013h00001mezcTAAQ	602 South Michigan St0013h00001mezcTAAQ	Madison0013h00001mezcTAAQ
9	3198 4628 46280013h00001mezcUAAQ	f817562639bb2f441d8e836aece0013h00001mezcUAAQ	Masked0013h00001mezcUAAQ	Heath_Updated0013h00001mezcUAAQ	177 Main Street0013h00001mezcUAAQ	Beeville0013h00001mezcUAAQ
10	7914 4374 43740013h00001mezcVAAQ	92fe9f912e33ed526e2ce9aa8df76ac60013h00001mezcVAAQ	Masked0013h00001mezcVAAQ	Dhukhu_Updated0013h00001mezcVAAQ	115 N Webb Rd0013h00001mezcVAAQ	Oakton0013h00001mezcVAAQ

Middle Name and Suffix Fields-

If the user wants to add a Middle name field and a Suffix field for masking, then two permissions need to be assigned to the user.

Permissions –

1. Enable Middle Names for Person Names
2. Enable Name Suffixes for Person Names

Users can assign these permissions from 'User Interface'. To assign those permissions follow the below path,

Setup -> Home -> User Interface -> Scroll Down and click on the 'User Interface' -> Go to the section 'Name Settings'

Users can check the two checkboxes and click on the Save button to assign these permissions as shown in the screenshot below.

The screenshot shows the Salesforce Setup interface. The left sidebar contains a navigation menu with categories like 'Sites and Domains', 'Translation Workbench', and 'User Interface'. The 'User Interface' option is highlighted with a red box. The main content area is titled 'SETUP User Interface' and contains several settings. A red box highlights the 'Name Settings' section, which includes the following options:

- Enable Click-and-Create Events on Calendar Views
- Enable Drag-and-Drop Scheduling on List Views
- Enable Hover Links for My Tasks list
- Enable Japanese Imperial Calendar in Lightning Experience for the Japanese locale

Below the 'Name Settings' section is the 'Setup' section, which includes the following options:

- Enable Enhanced Page Layout Editor
- Enable Streaming API
- Enable Dynamic Streaming Channel Creation
- Enable "Set Audit Fields upon Record Creation" and "Update Records with Inactive Owners" User
- Enable "Delete from Field History" and "Delete from Field History Archive" User Permissions [i](#)
- Enable Custom Object Truncate

Special Use Case – User Masking

Masking User records is considered one of the best ways to protect the personal information of org's users. When utilized, Salesforce permanently scrambles the user's object data and replaces it with random character strings. The user's detail page exists, but all of its fields will contain meaningless strings of characters. Salesforce simply obfuscates or scrambles personal data because you can't delete a user in Salesforce; you can only disable or deactivate a user. In other words, the user record still remains in the database, but this method performs a soft delete. This masking process does not work on Custom fields.

For further information on **masking, and user records read this article.**

Start Masking Records

Data Masking Execution

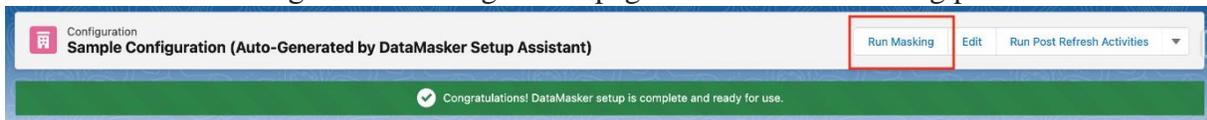
Before starting the Data masking process, you'll need to check a few things.

Ensure that the DM System Admin Permission Set is assigned to the user.

Note: If you are going for Bulk Deletion, then clone the "DM System Admin" permission set or create the new custom permission set. The "DM System Admin Clone" permission set should have "Bulk API Hard Delete" system permission enabled. In Custom Metadata Types, the value of "Use Bulk API" should be "TRUE".

Step 1: Initiate the Data Masking process

Click on 'Run Masking' on the Configuration page to initiate the masking process.



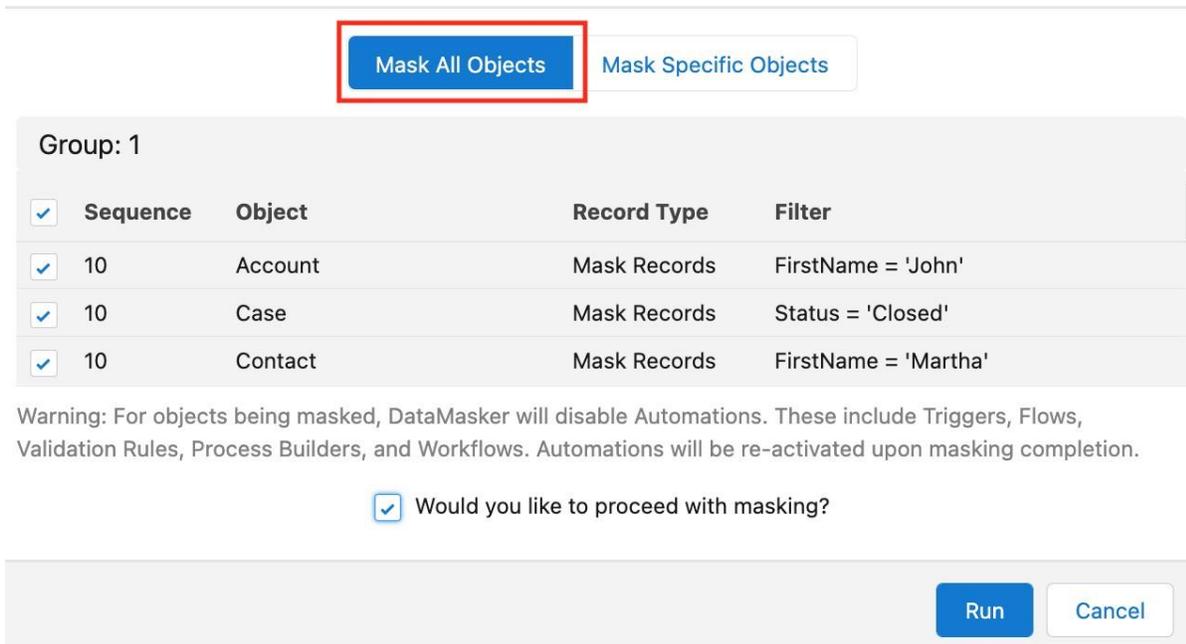
Step 2: Decide whether to 'Mask All' or 'Mask Specific' records

Once you click on the 'Data Masking' button, you will see two options with radio buttons

Mask All: Masking of All records

Mask Specific: Masking of Specific object records

Run Masking



The 'Run Masking' dialog box has two radio buttons: 'Mask All Objects' (selected and highlighted with a red box) and 'Mask Specific Objects'. Below the buttons is a table with the following data:

Group: 1	Sequence	Object	Record Type	Filter
<input checked="" type="checkbox"/>	10	Account	Mask Records	FirstName = 'John'
<input checked="" type="checkbox"/>	10	Case	Mask Records	Status = 'Closed'
<input checked="" type="checkbox"/>	10	Contact	Mask Records	FirstName = 'Martha'

Warning: For objects being masked, DataMasker will disable Automations. These include Triggers, Flows, Validation Rules, Process Builders, and Workflows. Automations will be re-activated upon masking completion.

Would you like to proceed with masking?

Buttons: Run, Cancel

'Mask All' processes all objects that are added in the object masking and contain records.

Click on the 'Run' button to start the masking process for your batch.

'Mask Specific' allows you to select specific objects to be masked from multiple objects that are added in object masking.

Run Masking

Group: 1

<input checked="" type="checkbox"/>	Sequence	Object	Record Type	Filter
<input checked="" type="checkbox"/>	10	Account	Mask Records	Id != null limit 10
<input checked="" type="checkbox"/>	10	Loan	Mask Records	Id = 'a0F3h00000BLVF9EAP'
<input checked="" type="checkbox"/>	10	Lead	Mask Records	Id = '00Q3h00000PoT9zEAF'
<input checked="" type="checkbox"/>	10	Opportunity	Mask Records	Id = '0063h00000IxRCvAAN'

Warning: For objects being masked, DataMasker will disable Automations. These include Triggers, Flows, Validation Rules, Process Builders, and Workflows. Automations will be re-activated upon masking completion.

Would you like to proceed with masking?

Confirm the checkbox 'Would you like to proceed with masking' and Click on the 'Run' button to begin the masking of the batch.

Masking of records created by inactive Users –

If a user wants to mask the records created by any user which is currently inactive then the user needs to assign one permission to mask those records.

Permission Name – Enable “Set Audit Fields upon Record Creation” and “Update Records with Inactive Owners” User Permissions

Follow the path to assign this permission –

Setup -> Home -> User Interface -> Scroll Down and click on the 'User Interface' -> Go to section 'Setup' -> Check the checkbox as shown in the below screenshot

SETUP
User Interface

- Enable Home Page Hover Links for Events
- Enable Drag-and-Drop Editing on Calendar Views
 - Enable Click-and-Create Events on Calendar Views
 - Enable Drag-and-Drop Scheduling on List Views
- Enable Hover Links for My Tasks list
- Enable Japanese Imperial Calendar in Lightning Experience for the Japanese locale

Name Settings

- Enable Middle Names for Person Names
- Enable Name Suffixes for Person Names
- Enable Local Names

Setup

- Enable Enhanced Page Layout Editor
- Enable Streaming API
- Enable Dynamic Streaming Channel Creation
- Enable Salesforce Platform REST API, OpenAPI 3.0 Spec Generation (Beta) ⓘ
- Enable "Set Audit Fields upon Record Creation" and "Update Records with Inactive Owners" User Permissions ⓘ
- Enable "Delete from Field History" and "Delete from Field History Archive" User Permissions ⓘ
- Enable Custom Object Truncate
- Use custom address fields ⓘ

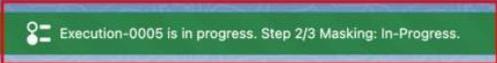
Custom address fields can't be disabled.
Before you enable custom address fields, review the [feature limitations](#) and [configure states, countries, and territories](#).

Advanced

- Enable Extended Mail Merge ⓘ

Dynamic Progress Banner – This is a progress banner that shows the masking progress stepwise and it gets changes dynamically as masking makes progress. It also shows the message when the masking gets completed or errored.

Configuration
Account Data Masking Mapping Run Masking Edit



Information

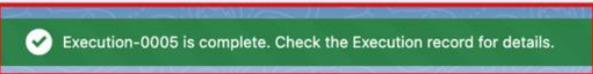
Configuration Name
Account Data Masking Mapping

Description ⓘ
Account Data Masking Mapping

Object Maskings (3)
3 items • Sorted by Object Masking Name • Updated a few seconds ago

	Object Mas...	Record Type	Description	Group	S
1	<input type="checkbox"/> Account	Mask Records		Group 1	11

Run Masking Edit Run Post Refresh Activitie



Object Maskings (3)
3 items • Sorted by Object Masking Name • Updated a few seconds ago

	Object Mas...	Record Type	Description	Group	Sequence	Filter Crit
1	<input type="checkbox"/> Account	Mask Records		Group 1	10	Id != null

The masking cycle is now complete. You can check on the status of your execution in the 'Execution Section

Monitor Masking Performance

Execution and Logs keep track of DataMasker's performance at a high level ('Execution') and a detailed level ('Execution Log').

To check the execution click on the "Executions" tab and the user can see the list of executions.

The screenshot shows a list of Mask Records with columns for ID, Name, Mask Records, Group, and Limit. Below this is a section titled "Executions (2)" with a sub-header "2 items • Sorted by Execution Name • Updated a minute ago". It contains a table with the following data:

Execution Name	Execution Status	Batch Status	Records To...	Records Pr...	Records Er...	Execution Du...
↑ Execution-0016	Completed	Completed	11,164,213	11,164,213	0	02 h : 32 mm

Open the most recently completed Execution.

The screenshot shows the "Executions" tab selected in the navigation bar. Below it is a section titled "Executions (1)" with a sub-header "1 item • Updated a few seconds ago". It contains a table with the following data:

Execution Name	Execution Sta...	Batch Status	Records To...	Records Pr...	Records Er...
1 Execution-0006	Completed	Completed	30	30	0

After clicking on the Execution tab, it will display the Execution Details page

The master object shows a summary of all Execution Logs of the executed Data Masking Configurations.

Execution-0006

Execution Name Execution-0006	Configuration UAT Sandbox
Execution Status Completed	Batch Status Completed
Records Total 30	Objects Total 3
Records Processed 30	Objects In-Progress 0
Records Errored 0	Objects Masked 3
Type All	Objects Errored 0
Start time 6/25/2021, 6:17 PM	End time 6/25/2021, 6:18 PM

Execution Log:-

Execution-0006 Edit Printable View Delete

Type **All** Start time **6/25/2021, 6:17 PM** Objects Errored **0** End time **6/25/2021, 6:18 PM**

Execution Logs (3) 3 items • Updated a minute ago Settings Copy New

Execution ...	Execution Log Status	Status	Records To...	Records Pr...	Records Er...	Apex Job Id Link	Exception ...	Start
1 Contact	Completed	Masked	10	10	0	/7075g00000I5NBEEA3		6/25/2021, 6:17 PM
2 Contact	Completed	Masked	10	10	0	/7075g00000I5NBGAA3		6/25/2021, 6:17 PM
3 Contact	Completed	Masked	10	10	0	/7075g00000I5NBHAA3		6/25/2021, 6:17 PM

Also, the user can see the section ‘Retry Executions’ which contains automatically created Retry Execution records.

To see the ‘Retry Execution’ section on the Execution Details page, you’ll need to add it from the Page Layout of the Execution object.

To add the Retry Executions section on the Execution detail page, you can follow the below steps –

Step 1: Go to Object Manager.

Step 2: Search for an object, “Execution”.

The screenshot shows the Salesforce Object Manager interface. At the top, there is a search bar labeled "Search Setup". Below it, the navigation menu includes "Setup", "Home", and "Object Manager". The main header displays "SETUP Object Manager" with a sub-header "2 Items, Sorted by Label". A table lists two objects:

LABEL	API NAME	TYPE	DESCRIPTION
Execution	pclm__Execution__c	Custom Object	
Execution Log	pclm__Execution_Log__c	Custom Object	

- **Step 3:** Click on the Page Layout and open the Execution Layout.

The screenshot shows the Salesforce Object Manager interface for the "Execution" object. The navigation menu includes "Setup", "Home", and "Object Manager". The main header displays "SETUP > OBJECT MANAGER Execution". A left sidebar contains a menu with "Page Layouts" highlighted. The main content area shows "Page Layouts" with a sub-header "1 Items, Sorted by Page Layout Name". A table lists one page layout:

PAGE LAYOUT NAME	CREATED BY
Execution Layout	Akash Ajagekar, 09/04/2022, 15:43

- **Step 4:** Click on the Related List.

SETUP > OBJECT MANAGER
Execution

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Quick Find Related List Name

Approval History Groups
Content Deliveries Notes & Attachments
Execution Logs Retry Executions
Files

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
Search Layouts for Salesforce

Fields
Buttons
Quick Actions
Mobile & Lightning Actions
Expanded Lookups
Related Lists
Report Charts

Mobile Cards (Salesforce mobile only)

Drag expanded lookups and mobile-enabled Visualforce pages here to display them as mobile cards.

Related Lists

Execution Logs New Change Owner

Execution Log Name	Execution Log Status	Status	Records Total	Records Processed	Records Errored
Sample Text	Sample Text	Sample Text	64,016	35,121	87,643

- **Step 5:** Drag the 'Retry Execution' section below the Execution Logs.

SETUP > OBJECT MANAGER
Execution

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Quick Find Related List Name

Approval History Groups
Content Deliveries Notes & Attachments
Execution Logs Retry Executions
Files

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
Search Layouts for Salesforce Classic

Fields
Buttons
Quick Actions
Mobile & Lightning Actions
Expanded Lookups
Related Lists
Report Charts

Mobile Cards (Salesforce mobile only)

Drag expanded lookups and mobile-enabled Visualforce pages here to display them as mobile cards.

Related Lists

Execution Logs New Change Owner

Execution Log Name	Execution Log Status	Status	Records Total	Records Processed	Records Errored
Sample Text	Sample Text	Sample Text	64,016	35,121	87,643

Retry Executions New Change Owner

Execution Name
Sample Text

- **Step 6:** Click on the Save button.

Now you can see the 'Retry Execution' section on the detail page of Executions.

Execution
Execution-0020

All 1

Start time 11/04/2022, 16:05 End time 11/04/2022, 16:43

Parent Execution Current Retry Count 0

Execution Logs (3)
3 items • Sorted by Group • Updated a few seconds ago

<input type="checkbox"/>	Execution Log Name	Execution ...	Status	Records Total	Records Processed	Records Errored	Group
1	Account	██████████	Errored				1
2	Contact	██████████	Masked	200,000	200,000	0	1
3	Employee	██████████	Masked	10,000	10,000	0	2

[View All](#)

Retry Executions (1)
1 item • Updated a few seconds ago

<input type="checkbox"/>	Execution Name
1	Execution-0021

You can click on the automatically created ‘Retry Executions’ and check the execution logs as well.

CC

Search...

Data Masker Configurations Patterns License

Parent Execution Current Retry Count 0

Execution Logs (3)
3 items • Sorted by Group • Updated 22 minutes ago

<input type="checkbox"/>	Execution Log Name	Execution ...	Status	Records Total	Records Processed	Records Errored	Re
1	Account	██████████	Errored				
2	Contact	██████████	Masked	200,000	200,000	0	0
3	Employee	██████████	Masked	10,000	10,000	0	0

[View All](#)

Retry Executions (1)
1 item • Updated 22 minutes ago

<input type="checkbox"/>	Execution Name
1	Execution-0021

[View All](#)

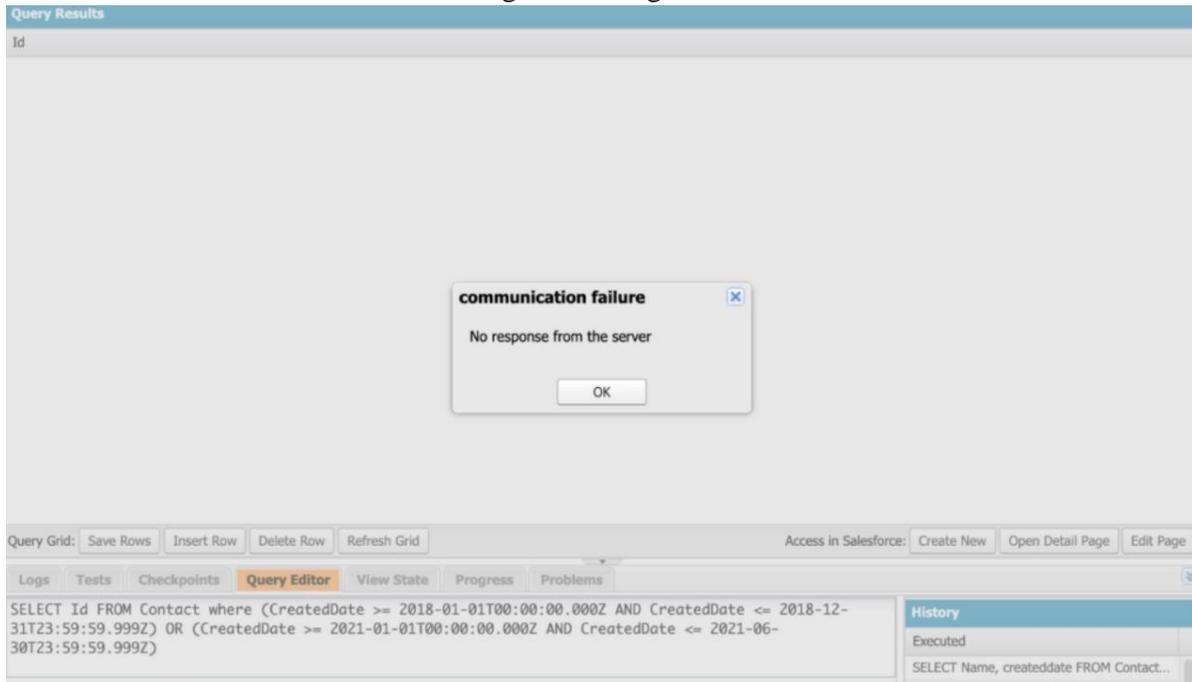
Now, click on any object name from the Execution Log – it will show detailed information for that single object. Here we click on “Contact” and it will show the object performance details. Users will find all performance-related information and Execution Log status here.

Advanced Configuration: Dealing with large data set (LDV)

Got millions of records in your Salesforce Org? You'll need to chunk millions of records into smaller data-set.

Example: There are 20 million contacts. It could take tens of hours to mask them, the masking operation can also encounter SOQL time-outs. The optimal approach is to slice them into five 4 million data sets. This way all of these five data sets will process in parallel. This also prevents any SOQL time-out exceptions.

To slice large data sets into smaller data sets, DataMasker 'Filter Criteria' can be used. Filter Criteria contains the where clause of a SOQL. The challenge with utilizing the 'where' clause in this situation, is that when you attempt to perform the SOQL operation on a chunk of records, it can time out. This makes it difficult to guess the right number of records to mask.



Method -1

This is where Postman comes in. Postman is an API platform for building and using APIs. It simplifies each step of the API lifecycle and streamlines collaboration, helping you create better APIs faster.

Below are the steps on how to utilize Postman:

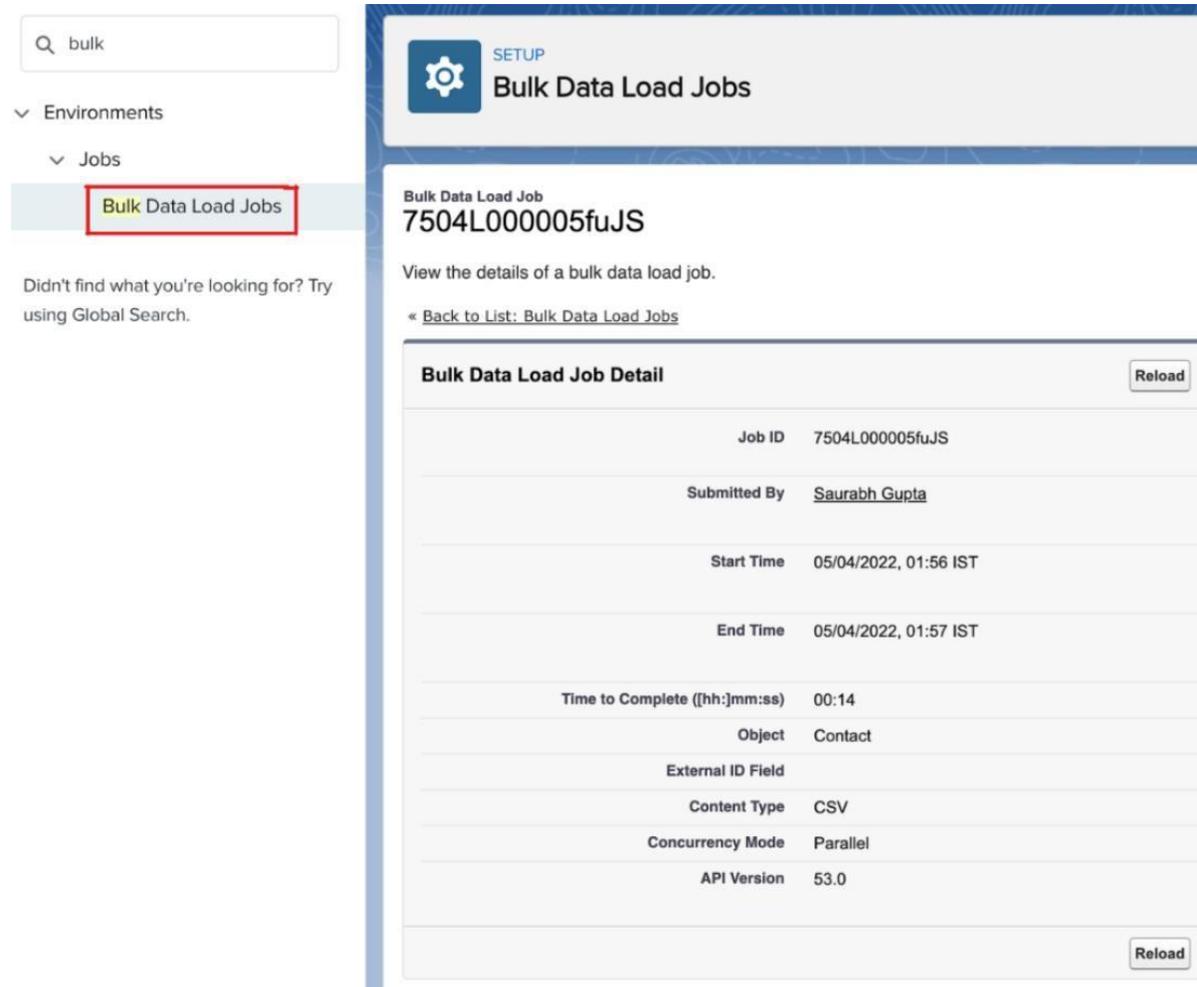
Step 1: Refer article to [download Postman and connect to your Salesforce Org](#)

Step 2: Once the connection is made, you now have the ability to submit simple query batch jobs using Bulk API. This will make it easier for you to get the count as it would not time out. For this refer to the following article, linked here.

Setup and Connect Postman

Use Bulk API 2.0

Step 3: Once a job is submitted, go to 'Navigate' -> 'Salesforce Dashboard Setup' -> 'Bulk Data Load Jobs.'



The screenshot shows the Salesforce Bulk Data Load Jobs setup page. On the left, there is a search bar with 'bulk' entered and a navigation menu with 'Bulk Data Load Jobs' highlighted. The main content area shows the job details for ID 7504L000005fuJS, including submission time, end time, and completion status.

Search: bulk

Environments

Jobs

Bulk Data Load Jobs

Didn't find what you're looking for? Try using Global Search.

Bulk Data Load Jobs

Bulk Data Load Job
7504L000005fuJS

View the details of a bulk data load job.

[« Back to List: Bulk Data Load Jobs](#)

Bulk Data Load Job Detail Reload

Job ID	7504L000005fuJS
Submitted By	Saurabh Gupta
Start Time	05/04/2022, 01:56 IST
End Time	05/04/2022, 01:57 IST
Time to Complete ([hh:]mm:ss)	00:14
Object	Contact
External ID Field	
Content Type	CSV
Concurrency Mode	Parallel
API Version	53.0

Reload

Now, you can see the status of the job, and prevent your masking from being impacted by time-outs.

Monitor Bulk Data Load Jobs

Monitor the status of recent bulk data load jobs. These jobs are created by Data Loader and other Bulk API client applications.

Quota

Your organization has processed **0** batches in the last 24 hours. Your organization can process **15,000** batches in a 24-hour period.

Resource used in the last 24 hours:
CPU: **2,191** milliseconds
IO: **0** bytes
Disk: **0** bytes

In Progress

Job ID	Submitted By	Start Time +	Status	Job Type
No records to display.				

Completed last 7 days

Job ID	Submitted By	Start Time	End Time +	Status
7504L000005g6WO	Gupta, Saurabh	11/04/2022, 12:06	11/04/2022, 12:07	Failed
7504L000005fuJN	Gupta, Saurabh	05/04/2022, 01:55	05/04/2022, 02:05	Failed
7504L000005fuJS	Gupta, Saurabh	05/04/2022, 01:56	05/04/2022, 01:57	Job Complete
7504L000005fsor	Gupta, Saurabh	04/04/2022, 10:30	04/04/2022, 10:40	Failed
7504L000005fsno	Gupta, Saurabh	04/04/2022, 10:10	04/04/2022, 10:10	Job Complete
7504L000005fsne	Gupta, Saurabh	04/04/2022, 10:09	04/04/2022, 10:09	Job Complete

Method -2

This makes it difficult for you to guess the right number of records to mask.

Here **Workbench** comes to the rescue. Workbench is an API platform for building and using APIs. It simplifies each step of the API lifecycle and streamlines collaboration, helping you create better APIs—faster.

Enable ability to execute Bulk API queries through an exposed DataMasker API `pclm.DM_DataMaskingService.createBulkQueryJob('_____');`

For eg.,

`pclm.DM_DataMaskingService.createBulkQueryJob('select id from Contact limit 3000000');`

Goto workbench, login with your salesforce org and click on the 'Apex Execute'.

The screenshot shows the Salesforce Workbench interface. At the top, there are navigation tabs: 'workbench', 'info', 'queries', 'data', 'migration', and 'utilities'. The 'utilities' tab is selected, and a dropdown menu is open, showing options: 'REST Explorer', 'Apex Execute' (highlighted with a red box), 'Password Manager', 'Bulk API Job Status', and 'Metadata API Process Status'. A tooltip for 'Apex Execute' says 'Execute Apex code as an anonymous block.' Below the navigation, there is a 'SQL Query' section with a message: 'Visual Studio Code now includes a SQL Builder. Try it today!'. A large blue box contains the text: 'First choose an object to use the SQL builder wizard.' Below this, there is a form to build a SQL query. It includes an 'Object:' dropdown, a 'View as:' section with radio buttons for 'List' (selected), 'Matrix', 'Bulk CSV', and 'Bulk XML', and a 'Deleted and archived records:' section with radio buttons for 'Exclude' (selected) and 'Include'. There are also fields for 'Sort results by:', 'Filter results by:', and 'Max Records:'.

Click on 'Execute'.

workbench  info queries data migration utilities

Apex Execute CHETAN PAUNIKAR AT CLOUDCOMPLIANCE ON API 54.0

Anonymous Apex can be executed from Visual Studio Code. [Try it today!](#)

Enter Apex code to be executed as an anonymous block:

Log Category: Log Level:

```
pcldm.DM_DataMaskingService.createBulkQueryJob('select id from contact limit 5000000');
```

Execute Reset

After Execute the query it will give the result

workbench  info queries data migration utilities

Apex Execute CHETAN PAUNIKAR AT CLOUDCOMPLIANCE ON API 54.0

Anonymous Apex can be executed from Visual Studio Code. [Try it today!](#)

Enter Apex code to be executed as an anonymous block:

Log Category: Log Level:

```
pcldm.DM_DataMaskingService.createBulkQueryJob('select id from contact limit 5000000');
```

Execute Reset

Results

```
54.0 APEX_CODE,DEBUG
Execute Anonymous: pcldm.DM_DataMaskingService.createBulkQueryJob('select id from contact limit 5000000');
18:22:30.682 (1682658511)|USER_INFO|[EXTERNAL]|0055i000005HJ8J|dm1.26beta3@test.com|(GMT+05:30) India Standard Time (Asia/Kolkata)|GMT+05:30
18:22:30.682 (1682690806)|EXECUTION_STARTED
18:22:30.682 (1682694865)|CODE_UNIT_STARTED|[EXTERNAL]|execute_anonymous_apex
18:22:30.682 (2417143445)|CODE_UNIT_FINISHED|execute_anonymous_apex
18:22:30.682 (2417166528)|EXECUTION_FINISHED
```

The User has to check in Bulk Data Loads Jobs.

 **SETUP Bulk Data Load Jobs**

Monitor Bulk Data Load Jobs Help for this Page

Monitor the status of recent bulk data load jobs. These jobs are created by Data Loader and other Bulk API client applications.

Quota

Your organization has processed 0 batches in the last 24 hours. Your organization can process 15,000 batches in a 24-hour period.

Resource used in the last 24 hours:
CPU: 0 milliseconds
IO: 0 bytes
Disk: 0 bytes

In Progress

Job ID	Submitted By	Start Time	Status	Job Type	Operation	Object	Records Processed	Records Failed	Progress
No records to display.									

Completed last 7 days

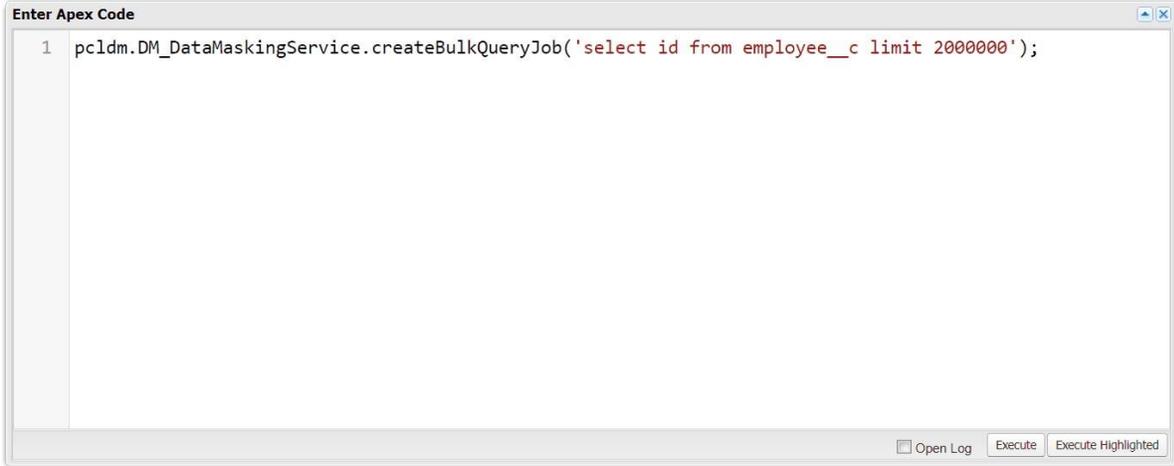
Job ID	Submitted By	Start Time	End Time	Status	Job Type	Operation	Object	Records Processed	Records Failed	Time to Complete (hh:mm:ss)
7504L000009SHN	Hampihalikar_Radha	08/08/2022, 12:24	08/08/2022, 12:34	Job Complete	Bulk V2 Query	Query	Contact	3000000	0	09:44

Method -3

Enable the ability to execute Bulk API queries through an exposed DataMasker API via Developer Console

```
pclm.DM_DataMaskingService.createBulkQueryJob('select id from employee_c limit 2000000');
```

Click on 'Execute'.



The User has to check in Bulk Data Loads Jobs.

The screenshot displays the 'Bulk Data Load Jobs' monitoring page. The page header includes a 'SETUP' icon and the title 'Bulk Data Load Jobs'. Below this, the section 'Monitor Bulk Data Load Jobs' is visible, along with a 'Help for this Page' link. The main content area is divided into three sections: 'Quota', 'In Progress', and 'Completed last 7 days'. The 'Quota' section shows that the organization has processed 0 batches in the last 24 hours and can process up to 15,000 batches. The 'In Progress' section shows a table with no records. The 'Completed last 7 days' section shows a table with two rows of completed jobs. The first row is highlighted with a red border.

Job ID	Submitted By	Start Time	End Time	Status	Job Type	Operation	Object	Records Processed	Records Failed	Time to Complete ([hh:]mm:ss)
7504L0000091917	Hampihalikar, Radha	08/08/2022, 12:43	08/08/2022, 12:48	Job Complete	Bulk V2 Query	Query	Contact	2000000	0	05:03
7504L000009191N	Hampihalikar, Radha	08/08/2022, 12:24	08/08/2022, 12:34	Job Complete	Bulk V2 Query	Query	Contact	3000000	0	09:44

Apex Action Masking

Apex Action is a special action provided in the DataMasker for masking the field value. Using Apex Action, users can encrypt the field value. This encryption will be based on the key specified in the custom metadata types. This key works by encrypting the field value character by character.

(Note: Users have to create custom metadata types with the values that should replace the old values after masking the desired records/fields.)

For example – Here “Key” is the custom metadata type and “New” and “Old” are the two custom fields that will hold both the list of characters and their replaceable characters.

The screenshot shows the Salesforce Setup page for Custom Metadata Types. The left sidebar has a search bar with 'custom metadata' and a navigation menu with 'Custom Code' and 'Custom Metadata Types'. The main content area is titled 'Custom Metadata Types' and shows details for a type named 'Key'. The 'Custom Metadata Type Detail' section includes fields for Singular Label (Key), Plural Label (Keys), Object Name (Key), API Name (Key__mdt), and Created By (Akash Test Ajagekar, 24/06/2021, 1:13 pm). Below this is a 'Standard Fields' table.

Action	Field Label	Field Name
	<u>Created By</u>	CreatedBy
Edit	<u>Custom Metadata Record Name</u>	DeveloperName
Edit	<u>Label</u>	MasterLabel

This screenshot shows the same Salesforce Setup page, but with the 'Custom Fields' section highlighted by a red box. The 'Custom Fields' table lists two fields: 'New' and 'Old', both of type Text(255) and with 'Upgradable' field manageability. The 'Validation Rules' section is also visible at the bottom.

Action	Field Label	API Name	Data Type	Field Manageability
Edit Del	<u>New</u>	New__c	Text(255)	Upgradable
Edit Del	<u>Old</u>	Old__c	Text(255)	Upgradable

Now click on the “Manage Keys” button and add labels for keys.

Q custom metadata

Custom Code

Custom Metadata Types

Didn't find what you're looking for? Try using Global Search.

Custom Metadata Types

Key

Standard Fields (0) | Custom Fields (2) | Validation Rules (0)

Custom Metadata Type Detail

Edit Delete **Manage Keys**

Singular Label	Key	
Plural Label	Keys	
Object Name	Key	Prot
API Name	Key__mdt	
Created By	Akash Test Ajagekar	24/06/2021, 1:13 pm

Standard Fields

Q custom metadata

Custom Code

Custom Metadata Types

Didn't find what you're looking for? Try using Global Search.

Custom Metadata Types

Keys

View: All Create New View

New

Action	Label ↑	Key Name
Edit Del	Lower a	Lower_a
Edit Del	Lower b	Lower_b
Edit Del	Lower c	Lower_c
Edit Del	Lower d	Lower_d

Click on the label link to add “New” and “Old” values.

Q custom metadata

Custom Code

Custom Metadata Types

Didn't find what you're looking for? Try using Global Search.

Custom Metadata Types

Key

Key Detail

Edit Delete Clone

Label	Lower a
Key Name	Lower_a
New	q
Old	a

Created By Akash Test Ajagekar 24/06/2021, 1:28 pm

Edit Delete Clone

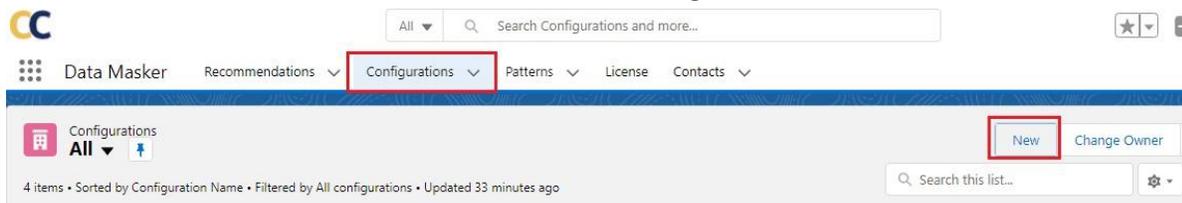
After the creation of all the keys users have to add a custom class 'DM_OfbuscationCustomV1' in the org which will inherit managed package class 'DM_OfbuscationService' to mask data using Apex action.

```
global class DM_OfbuscationCustomV1 implements peldm.DM_OfbuscationService {
global map < String, Object > ofbuscateData(map < String, Object > dataMap) {
if (dataMap.containsKey('objectName') && dataMap.containsKey('fieldName') && dataMap.containsKey('fieldType') &&
dataMap.containsKey('fieldValue')) {
String objectName = (String) dataMap.get('objectName');
String fieldName = (String) dataMap.get('fieldName');
String fieldType = (String) dataMap.get('fieldType');
String fieldValue = (String) dataMap.get('fieldValue');
if (String.isNotBlank(fieldValue)) {
Map < String, String > charMap = new Map < String, String > ();
for (Key__mdt k: Key__mdt.getall().values()) {
charMap.put(k.Old_c, k.New_c);
}
List < String > tempArray = fieldValue.split("");
String returnStr = "";
for (String character: tempArray) {
returnStr += charMap.containsKey(character) ? charMap.get(character) : character;
}
if (String.isBlank(returnStr)) {
returnStr = fieldValue;
}
returnStr = returnStr.escapeCsv();
dataMap.put('fieldValue', returnStr);
}
}
return dataMap;
}
}
```

Below are the steps to implement an Apex Action masking solution –

Step 1: Create a New Configuration

Open the Data Masker app and click on 'Configuration' in order to create a new configuration record. Click on the 'New' button and name the configuration.



New Configuration

Configuration Name ↻

Configuration Id ?

Description ?

Delete Settings

Attachments & Files ?

Events ?

Notes ?

Tasks ?

Chatter ?

Emails ?

Case Comments ?

Field History ?

Open the configuration by clicking on the link.

CC All ▾ 🔍 Search Configurations and more...

Data Masker Recommendations ▾ **Configurations** ▾ Patterns ▾ License Contacts ▾

Configurations
All ▾ ↑

4 items • Sorted by Configuration Name • Filtered by All configurations • Updated 39 minutes ago 🔍 Search this list

	Configuration Name ↑	Description
1	Apex action testing	
2	Sample	
3	Sample Configuration	Test Case to Reproduce Attempt to De-reference Null object issue
4	Test Case	Case (Dereference Null Object error)

Step 2: Create an Object Masking record

Create an Object Masking record for the Object on which you want to use Apex Action. In this case, the Object is Contact.

Configuration
Masking with Apex Action Run Masking Edit Run Post Refresh Activities ▾

✔ Congratulations! DataMasker setup is complete and ready for use.

Information

Configuration Name
Masking with Apex Action

Description ?

Object Maskings (2) ⚙️ 🗑️ New

2 items • Sorted by Group • Updated a few seconds ago

	Object Masking Na...	Record Type	Description	Group ↑	Sequence	Filter Crit...
1	Account	Mask Records		Group 1	10	
2	Contact	Mask Records		Group 1	10	

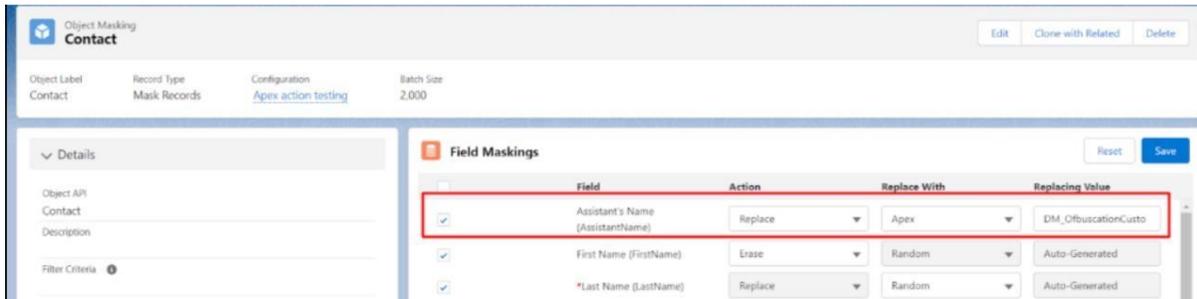
View All

Step 3: Click on the object link to add fields for making. Users will be redirected to the field masking layout.

Add the Apex Action Class Name.

Add the Apex Action class name in the 'Enter Value' text field. Here, you can add more fields as per business requirements.

Users can add multiple fields at the same time by checking the checkbox. Select Replace with 'Apex' and enter the class name 'DM_OfbuscationCustomV1' at the replacing value. Click on the Save button.



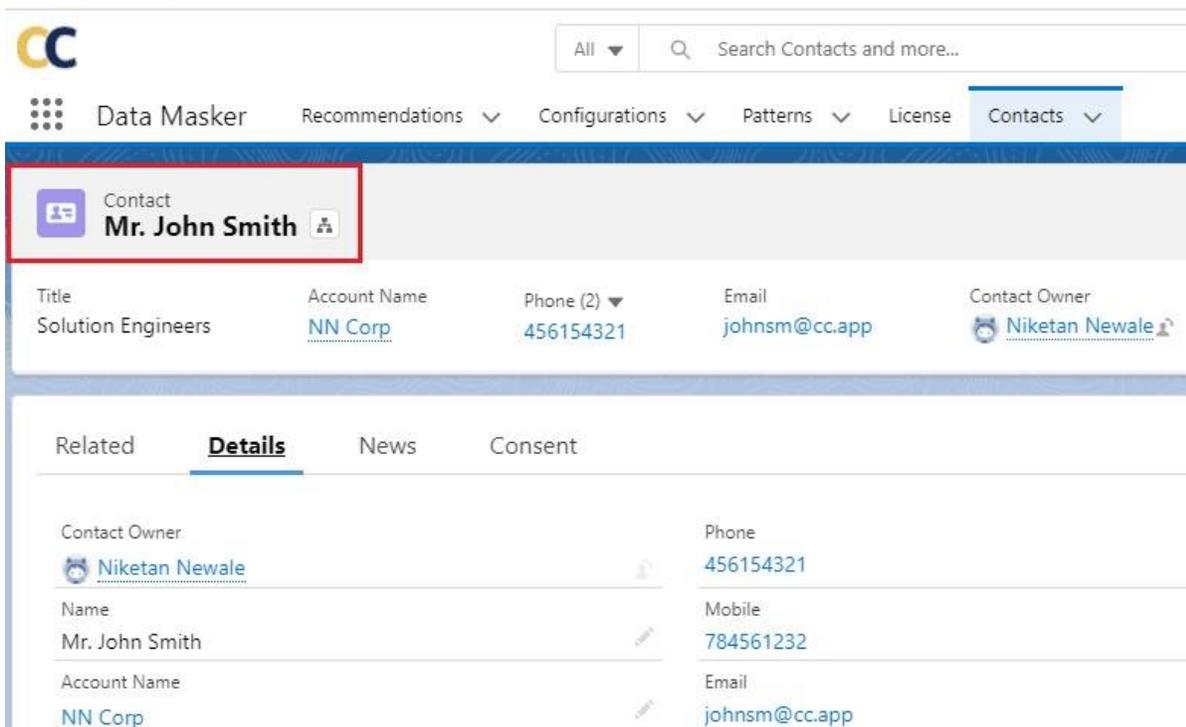
Here, mapping is all set and users can mask records with defined Apex Action.

For example, suppose we want to replace first name "John" of the contact with Apex Action and the user has created a key as follows –

J -> X , o -> w , h -> b , n -> c.

Then, after masking "John", it will be masked with the mentioned key and the new first name will look like "Xwbc".

Let's take a Contact record "John Smith".



Now open the configuration and start masking for Apex Action by clicking on the "Run Masking" button and following the steps.

Configuration
Masking with Apex Action

Run Masking Edit Run Post Refresh Activities

✔ Congratulations! DataMasker setup is complete and ready for use.

Information

Configuration Name
Masking with Apex Action

Description

Org-Wide Delete Settings

Attachments & Files Events

Object Maskings (2)

2 Items - Sorted by Group - Updated a few seconds ago

Object Masking Na...	Record Type	Description	Group	Sequence	Filter Crit...
1 Account	Mask Records		Group 1	10	
2 Contact	Mask Records		Group 1	10	

View All

After successfully masking, the record will be masked as mentioned keys in the Custom Metadata. In this case “John” will be replaced with the text “Xwbc”.

CC

All Search...

Data Masker Recommendations Configurations Patterns License Contacts

Contact

Mr Xwbc Smith

Title: Solution Engineers
Account Name: NN Corp
Phone (2): 456154321
Email: johnsm@cc.app
Contact Owner: Niketan Newale

Related **Details** News Consent

In this way, the user can add multiple fields in masking and can mask data with APEX action.

Data Masking Using Action – Formula Field

Data Masker supports the action ‘Formula Field’ which replaces the field value with the value returned by the Formula Field.

There are several data types that support Formula Field return types like Checkbox, Currency, Date, Number, Percent, Text, and Time.

Pre-requisites:

Initially, Formula Field action is hidden from the Field Mapping Layout, so the user needs to unhide this from the Setup.

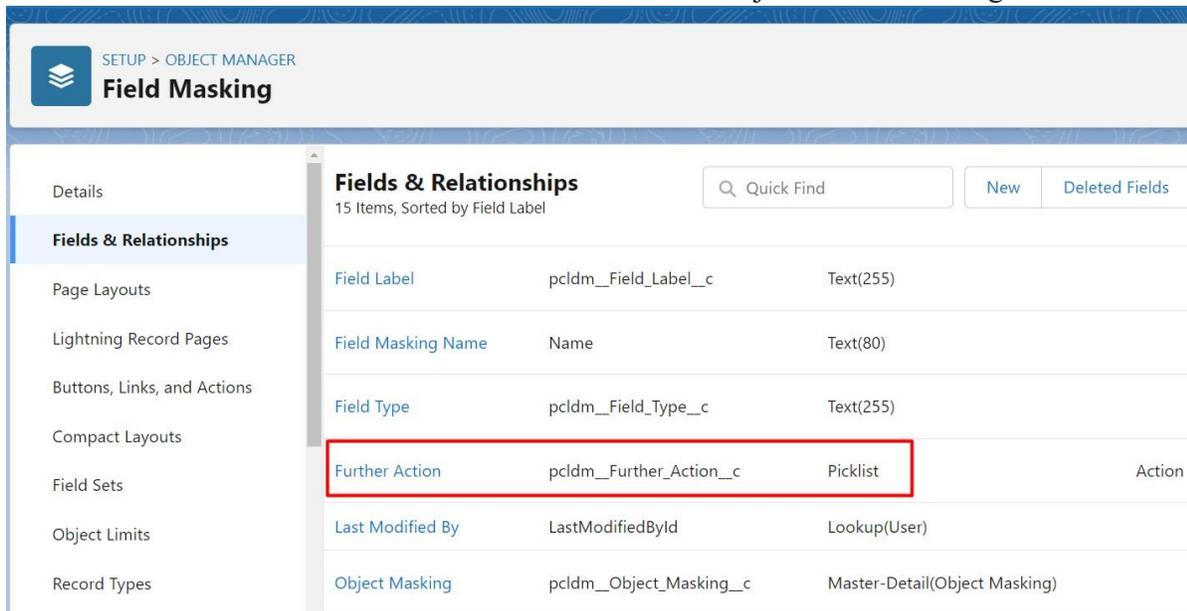
To unhide the Formula Field follow the below steps –

Solution Steps –

Step 1: i. Go to Object Manager

ii. Search for an object ‘Field Masking’

iii. Click on the Field ‘Further Action’ from the object ‘Field Masking’



The screenshot shows the Salesforce Object Manager interface for the 'Field Masking' object. The breadcrumb is 'SETUP > OBJECT MANAGER'. The page title is 'Field Masking'. On the left, a navigation menu lists various object settings: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, and Record Types. The main content area is titled 'Fields & Relationships' and shows 15 items sorted by Field Label. A table lists the fields with their API names and data types. The 'Further Action' field is highlighted with a red box. The table also includes 'Action' column for the 'Further Action' field.

Field Label	API Name	Data Type	Action
Field Label	pcldm__Field_Label__c	Text(255)	
Field Masking Name	Name	Text(80)	
Field Type	pcldm__Field_Type__c	Text(255)	
Further Action	pcldm__Further_Action__c	Picklist	Action
Last Modified By	LastModifiedById	Lookup(User)	
Object Masking	pcldm__Object_Masking__c	Master-Detail(Object Masking)	

iv. Scroll Down to the Inactive Values section

SETUP > OBJECT MANAGER
Field Masking

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Validation Rules New

No validation rules defined.

Values New Reorder Replace Printable View Chart Colors

Action	Values	API Name	Default	Chart Colors
Edit Del Deactivate	Random	Random	<input type="checkbox"/>	Assigned dynamically
Edit Del Deactivate	Hardcoded Value	Hardcoded Text	<input type="checkbox"/>	Assigned dynamically
Edit Del Deactivate	Pattern - Custom List	Pattern - Custom List	<input type="checkbox"/>	Assigned dynamically
Edit Del Deactivate	Pattern - Regex	Pattern - Regex	<input type="checkbox"/>	Assigned dynamically
Edit Del Deactivate	Apex	Apex	<input type="checkbox"/>	Assigned dynamically

Inactive Values Delete Unused Values ^{Beta!}

Action	Values	API Name	Modified By
Del Activate	Formula Field	Formula Field	Akash Ajagekar, 9/20/2022, 3:19 PM

[Back To Top](#) Always show me [more records per related list](#)

v. Click on the 'Activate'

SETUP > OBJECT MANAGER
Field Masking

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

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No validation rules defined.

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Action	Values	API Name	Default	Chart Colors
Edit Del Deactivate	Random	Random	<input type="checkbox"/>	Assigned dynamically
Edit Del Deactivate	Hardcoded Value	Hardcoded Text	<input type="checkbox"/>	Assigned dynamically
Edit Del Deactivate	Pattern - Custom List	Pattern - Custom List	<input type="checkbox"/>	Assigned dynamically
Edit Del Deactivate	Pattern - Regex	Pattern - Regex	<input type="checkbox"/>	Assigned dynamically
Edit Del Deactivate	Apex	Apex	<input type="checkbox"/>	Assigned dynamically

Inactive Values Delete Unused Values ^{Beta!}

Action	Values	API Name	Modified By
Del Activate	Formula Field	Formula Field	Akash Ajagekar, 9/19/2022, 5:02 PM

- After completing Step 1, the User needs to complete Step 2 to include the 'Formula Field' action in the Field Masking component.

Step 2: i. Go to Object Manager

ii. Search for object 'Field Masking'

iii. Click on the Field 'Further Action' from the object 'Field Masking'

iv. Scroll Down to the 'Picklist Options' section

SETUP > OBJECT MANAGER

Field Masking

- Details
- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters

Description	This is Dependent on the Action selected before so as to give furth
Help Text	This is Dependent on the Action selected before so as to give furth
Data Owner	
Field Usage	
Data Sensitivity Level	
Compliance Categorization	
Created By	Akash Ajagekar , 9/19/2022, 5:02 PM

Package Information

Installed Package [Data Masker](#)

General Options

Required

Default Value [i](#)

Picklist Options

Restrict picklist to the values defined in the value set

Controlling Field [Action \[Change\]](#)

v. Click on the link 'Change' next to the Controlling Field

SETUP > OBJECT MANAGER

Field Masking

- Details
- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts

Required

Default Value [i](#)

Picklist Options

Restrict picklist to the values defined in the value set

Controlling Field [Action \[Change\]](#)

Picklist Values Used

Active and inactive picklist values 6 (1,000 max)

vi. After Clicking on the 'Change' user will be redirected to the 'Edit Field Dependency' page. Click on the Formula Field

Click button to include or exclude selected values from the dependent picklist:

Showing Columns: 1 - 2 (of 2) < Previous Next > View All Go to		
Action:	Erase	Replace
Further Action:	Random	Random
	Hardcoded Value	Hardcoded Value
	Pattern - Custom List	Pattern - Custom List
	Pattern - Regex	Pattern - Regex
	Apex	Apex
	Formula Field	Formula Field

Showing Columns: 1 - 2 (of 2) < Previous | Next > View All

Click button to include or exclude selected values from the dependent picklist:

- Click on the 'Include Values'

Click button to include or exclude selected values from the dependent picklist:

Showing Columns: 1 - 2 (of 2) < Previous Next > View All Go to		
Action:	Erase	Replace
Further Action:	Random	Random
	Hardcoded Value	Hardcoded Value
	Pattern - Custom List	Pattern - Custom List
	Pattern - Regex	Pattern - Regex
	Apex	Apex
	Formula Field	Formula Field

Showing Columns: 1 - 2 (of 2) < Previous | Next > View All

Click button to include or exclude selected values from the dependent picklist:

- Now Formula Field action is ready to use.
- To mask the records with the help of Formula Field action, user needs to enter the API name of the respective Formula Field in the Replacing Value section.

Note – While adding a field for masking with the formula field, the user needs to make sure Formula Field with respective return type is created.

Eg. If the user is adding Number Field in the field masking then Formula Field with a Number return type should be created for that particular object.

Field Maskings

<input type="checkbox"/>	Field	Action	Replace With	Replacing Value	Unique
<input checked="" type="checkbox"/>	CC Number (CC_Number_c)	Replace	Formula Field	Formula_Number_c	<input type="checkbox"/>
<input checked="" type="checkbox"/>	CC Percentage (CC_Percentage_c)	Replace	Formula Field	Formula_Percentage_c	<input type="checkbox"/>
<input type="checkbox"/>	Account ID (AccountId)	Erase	Hardcoded Value	Search Accounts... <input type="text"/>	<input type="checkbox"/>
<input type="checkbox"/>	Alternate Email (Alternate_Email_c)	Erase	Random	Auto-Generated	<input type="checkbox"/>

- Click on the Save button and execute the Data Masking
- After masking, users can check that field values will be replaced by the value returned by the Formula Field.

CC Date/Time	
CC Number	5,414
CC Percentage	5,400%
Formula Time	08:38:29
CC Time Field	

- Likewise, users can perform masking by Formula Field action as per the business requirement.

Note – There may be some variations in the value for Data type ‘Date/Time from the value returned by the Formula Field for it.

Considerations for Person Account Org

For Data Masker App

You need to create a mapping in two groups. The first group will have the record type Id of Business Account and Person Account and Group 2 will contain the Contact object (in case you want to mask contact along with the account).

Note – Keeping Person account and Contact in different groups avoids row locking issues.

The Group 1 mapping contains Business Account and hence the filter criteria will contain RecordTypeId = 'RecordTypeID of Business Account'. In the field mapping for this business account users have to add only the “Name” field in the field mapping under the Account Object- Account

Field- Name

Apart from this, the user can add any number of fields in the field mapping

Person Account

For Example- Group 1 contains the filter criteria of Person Account RecordTypeId and users have to add only the “FirstName” and “LastName” fields in the field mapping under the Account Object

Object- Account

Field- First name

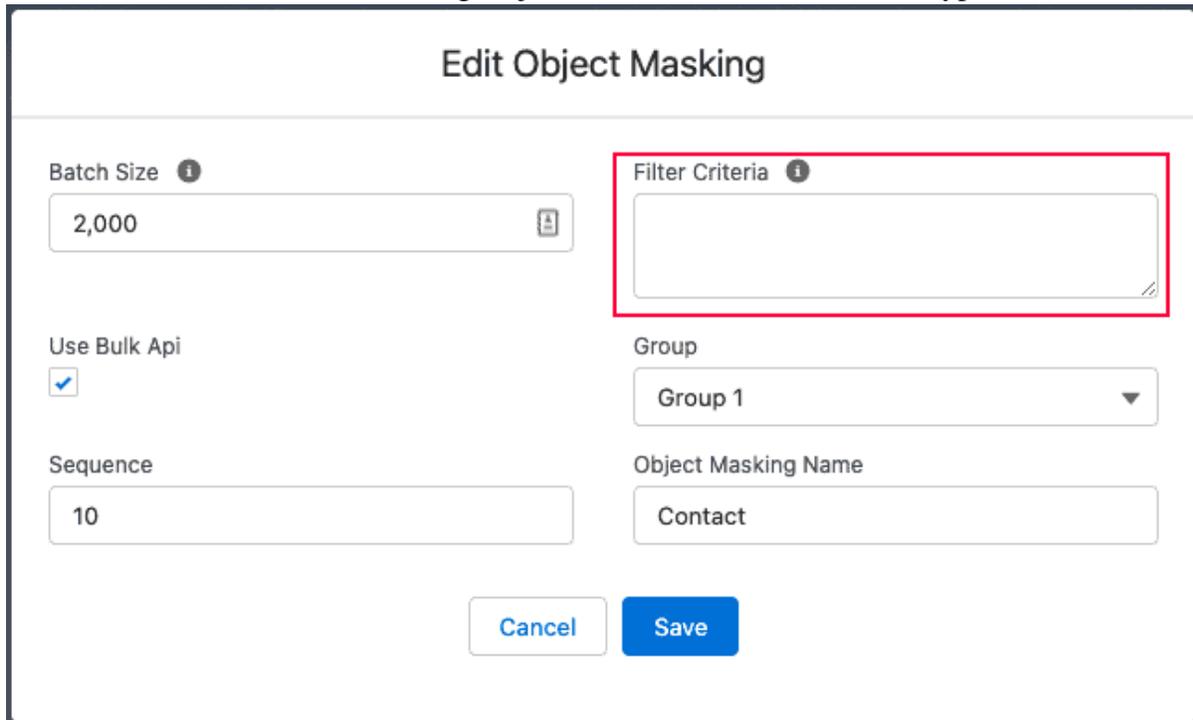
Field- Last name

Apart from this, the user can add any number of fields in the field mapping

Note – For more information on the person account please refer to the Salesforce Knowledge Article – [Person Accounts in Salesforce](#)

Considerations for Shield Org

DataMasker is compatible with Salesforce Shield and you should find no performance degradation or product limitation. However, one of the considerations for Shield Orgs is that the 'Filter Criteria' field on the Masking Object can not include a Shield encrypted field.



Edit Object Masking

Batch Size ⓘ
2,000 ⓘ

Filter Criteria ⓘ

Use Bulk Api

Sequence
10

Group
Group 1 ▼

Object Masking Name
Contact

Cancel Save

Salesforce Shield Org with Person Account Enabled

Shield Orgs with Person Account enabled have Account and Contact somewhat intertwined. Encrypting some of the specific fields on Account encrypts the equivalent Contact fields and vice versa. A list of fields that follow this behavior are:

- Name
- Description
- Mailing Address
- Phone
- Fax
- Mobile
- Home Phone
- Other Phone
- Email

Reactivate Automations

DataMasker application Deactivates all the automations like Process Builders, Workflows, Flows, Triggers, and Validation Rules while processing. After Masking is completed, Data Masker reactivates those Automations that are deactivated already.

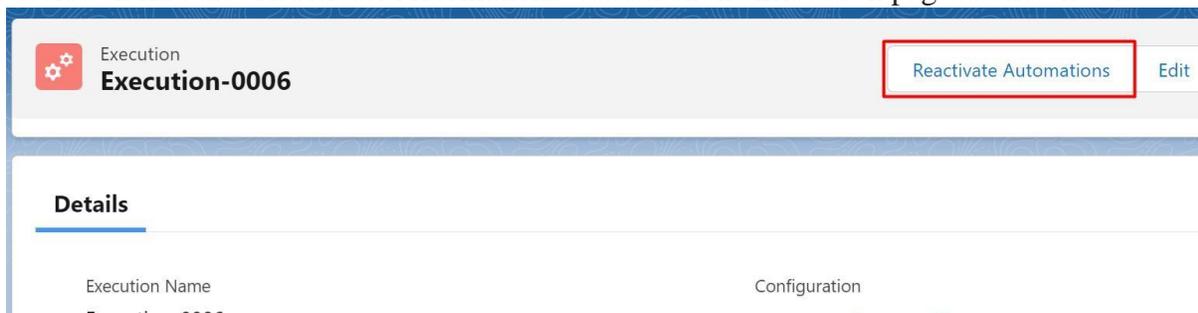
But in the case that due to some uncertain error or exception masking gets stuck and Data Masker has already deactivated all automations then the user can use the button 'Reactivate Automations' to reactivate those automations instead of activating them manually.

Prerequisites-

- The user should know which execution has errored out and deactivated all the automations.

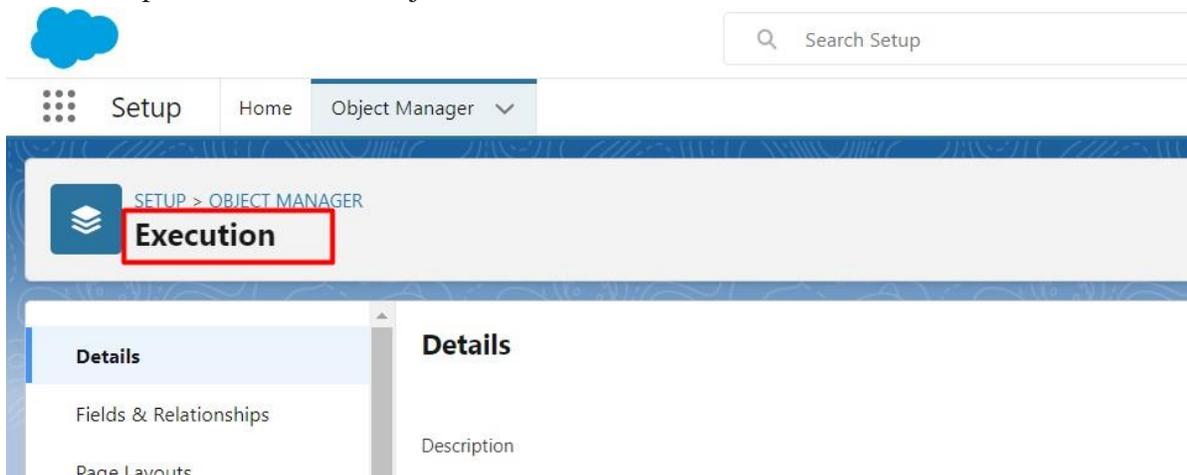
Solution Steps –

Users can find the 'Reactivate Automations' button on the Execution page as shown below.



If it is not available on the Execution page then the user can add it from the page layout of the Execution object.

Go to Setup -> Search for an object Execution



Go to Page Layouts –> Open Execution Layout

Setup > Object Manager

Execution

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Page Layouts

1 Items, Sorted by Page Layout Name

PAGE LAYOUT NAME	CREATED BY
Execution Layout	Akash Ajagekar, 8/23/2022, 1:19 PM

Click on the Mobile and Lightning Action and search for the button 'Reactivate Automations'

Setup > Object Manager

Execution

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Quick Find Mobile Action Name

Edit	Log a Call	New Contact	New Note	Post	Submit for
Email	Mobile Smart Actions	New Event	New Opportunity	Printable View	Thanks
File	New Account	New Group	New Task	Question	
Link	New Case	New Lead	Poll	Reactivate Automa...	

Drag the 'Reactivate Automation' button to the Layout

Setup > Object Manager

Execution

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

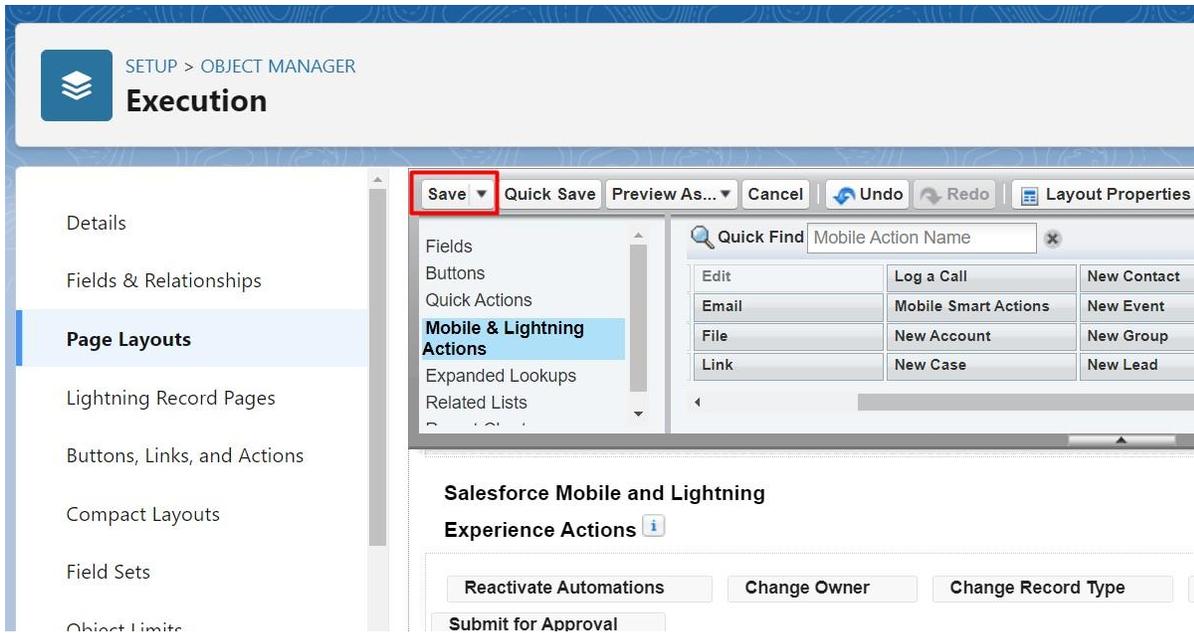
Quick Find Mobile Action Name

Edit	Log a Call	New Contact	New Note
Email	Mobile Smart Actions	New Event	New Opportunity
File	New Account	New Group	New Task
Link	New Case	New Lead	Poll

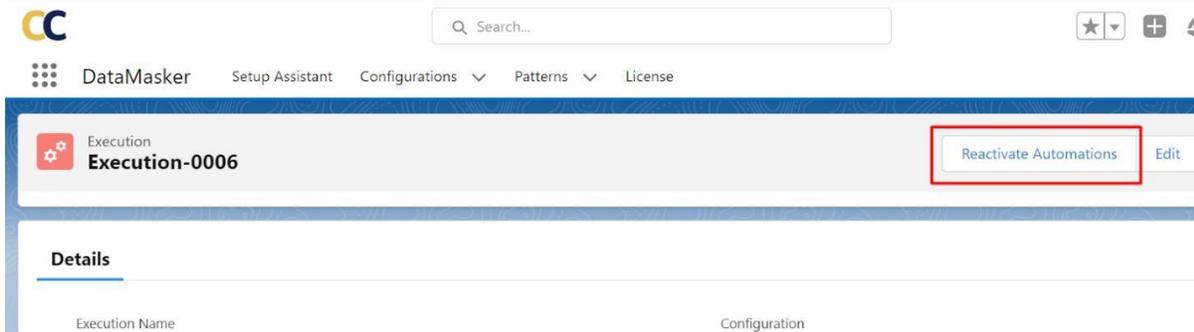
Salesforce Mobile and Lightning Experience Actions

Reactivate Automations	Change Owner	Change Record Type	Edit	Printable View
Submit for Approval				

Click on the Save button



Go back to the Execution Page and Refresh it, User will see the 'Reactivate Automation' but is visible.



Now go to the execution by which all the automations got deactivated and Click on the 'Reactivate Automation' button.

All the automations will be reactivated

User can check all the automations has been reactivated by the workbench

	pcldm__Deactivated_on__c	pcldm__Entity_Id__c	pcldm__Object_API__c	pcldm__Reactivated_On__c
1	2022-08-23T11:34:48.000Z	Contact	Contact	2022-08-23T12:06:23.000Z
1	2022-08-23T11:34:52.000Z	Contact	Contact	2022-08-23T12:06:28.000Z
1	2022-08-23T09:47:04.000Z	Case	Case	2022-08-23T09:49:07.000Z
1	2022-08-23T09:47:07.000Z	Case	Case	2022-08-23T09:49:11.000Z
1	2022-08-23T09:47:09.000Z	Asset	Asset	2022-08-23T09:49:12.000Z
1	2022-08-23T09:47:10.000Z	Asset	Asset	2022-08-23T09:49:13.000Z
1	2022-08-23T09:47:15.000Z	Loan__c	Loan__c	2022-08-23T09:49:18.000Z
1	2022-08-23T09:47:22.000Z	Loan__c	Loan__c	2022-08-23T09:49:24.000Z
1	2022-08-23T09:47:26.000Z	Contact	Contact	2022-08-23T09:49:28.000Z
1	2022-08-23T09:47:30.000Z	Contact	Contact	2022-08-23T09:49:32.000Z

Likewise, user can use the 'Reactivate Automations' to activate all the automations which has been deactivated by Data Masker during processing.

Automate Post Refresh

Step 1: Update Custom Labels With Post Refresh Activities

**This step is Optional*

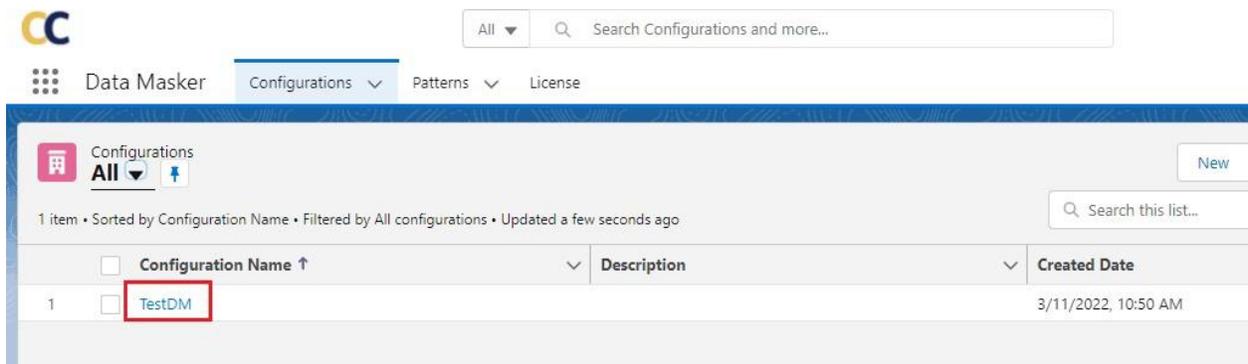
Custom Labels:- Custom labels enable developers to create multilingual applications by automatically presenting information (for example, help text or error messages) in a user’s native language.

Prerequisites –

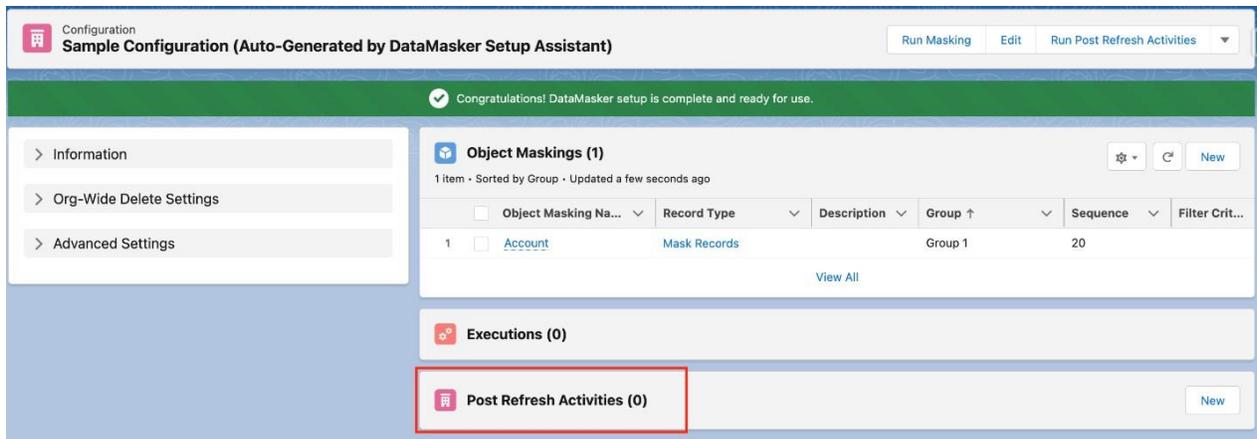
Assign "DM System Admin" permission set to the appropriate user.

Solution –

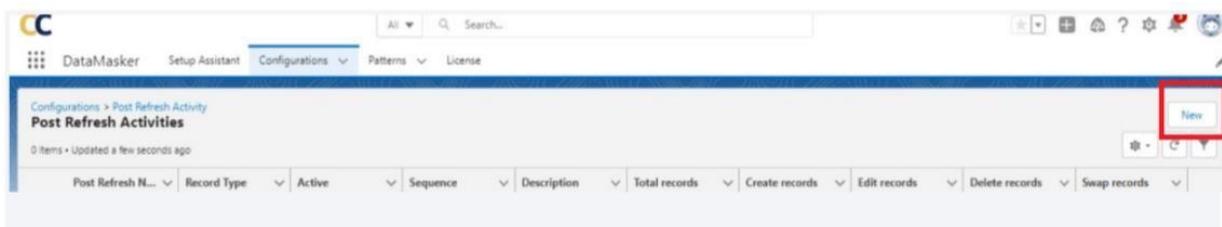
1. Navigate to the Configuration tab and open the configuration record.



2. Now scroll down to the "Post Refresh Activities" section. To create a new Post Refresh Activity record, click on the Post Refresh Activities Tab.



Click on the New Button



3. A pop-up will appear where you will see two record types in which you can select Custom Labels and click on the Next button.

New Post Refresh Activity

Select a record type

- Custom Labels
- Remote Site Settings

Cancel

Next

4. Second pop-up will appear. Enter the details to create a new Custom Label record.

New Post Refresh Activities: Custom Label

Information

*** Post Refresh Name**

Record Type

Custom Label

*** Configuration**

📄
Data Masker Configuration
✕

Active

Description

📄
Custom Label Description
🔄

Sequence

Cancel Save & New Save

Post Refresh Name – Name of Post Refresh Activity

Description – Description for Post Refresh Activity

Active – You need to check the Active checkbox

Sequence – Sequence that decides which Post Refresh Activity will execute first.

Click on the Save button.

5. Now click on the Custom Label record that has been created

Post Refresh Name	Record Type	Active	Sequence	Description	Total records	Create records	Edit records	Delete records	Swap records
CustomLabel	Custom Label	<input checked="" type="checkbox"/>	1	Custom Label Description	0	0	0	0	0

This will open the detail page where you can find the two sections,

- Post Refresh Activities
- Post Refresh Activity Details

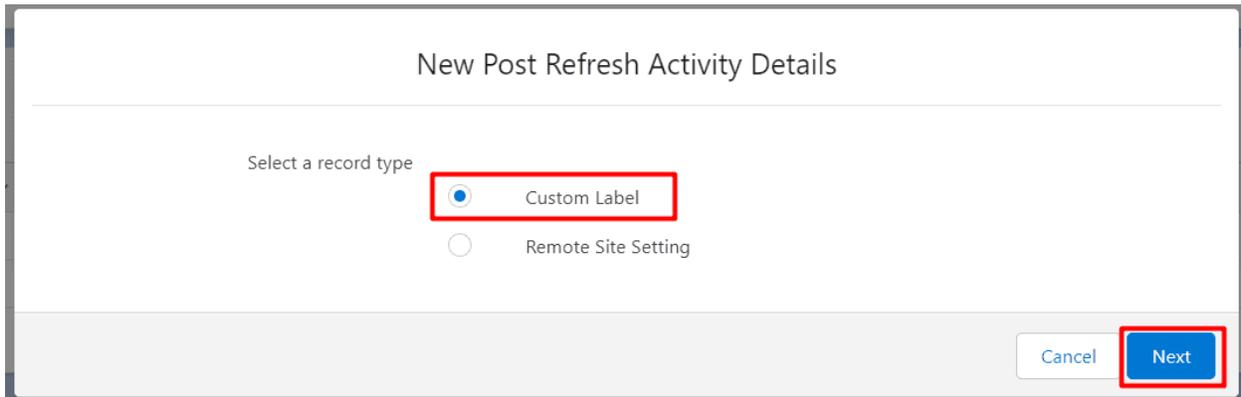
6. Click on the New button to create the Post Refresh Activity Details record.

Post Refresh Activities
Custom Label

Record Type: Custom Label Configuration: [Data Masker Configuration](#) Active: Sequence: 1 Total records: 1 Create records: 1

Post Refresh Activity Details (0) New

7. After clicking on the New button you will see two record types, user can select Custom Label and click on the Next button.



New Post Refresh Activity Details

Select a record type

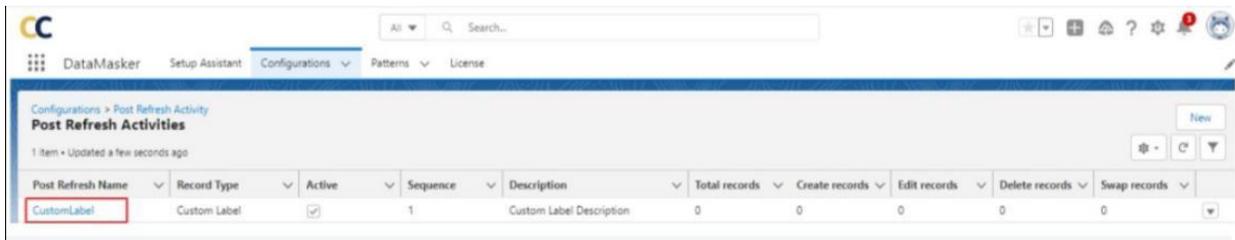
Custom Label

Remote Site Setting

Cancel Next

8. Now click on the Next button, and the detail page will appear where the user can fill in the required details.

There is an Edit action in Custom Label, users can update existing Custom Label records as per the business use case.



CC DataMasker Setup Assistant Configurations Patterns License

Configurations > Post Refresh Activity

Post Refresh Activities New

1 item • Updated a few seconds ago

Post Refresh Name	Record Type	Active	Sequence	Description	Total records	Create records	Edit records	Delete records	Swap records
CustomLabel	Custom Label	<input checked="" type="checkbox"/>	1	Custom Label Description	0	0	0	0	0

Update Existing Custom Label –

- To Update the existing custom label you need to select the Edit action.
- Click on the Custom Label that has been already created under the Post Refresh Tasks tab.
- After clicking on the Post Refresh Name you can enter the name of the custom label that has been created or the existing custom label name and then the new value that the user wants to replace with.
- Here user needs to change the Action Edit as shown below screenshot and click on the Save button.

New Post Refresh Activity Details: Custom Label

Information

* Post Refresh Activities

Custom Label
✕

* Operation

Edit
▼

Custom Label

* Label

Review

Custom Label Value

new update
G

* Description

Update Review
G

Protected Component

Post Refresh Activity Execution Details

Status

--None--
▼

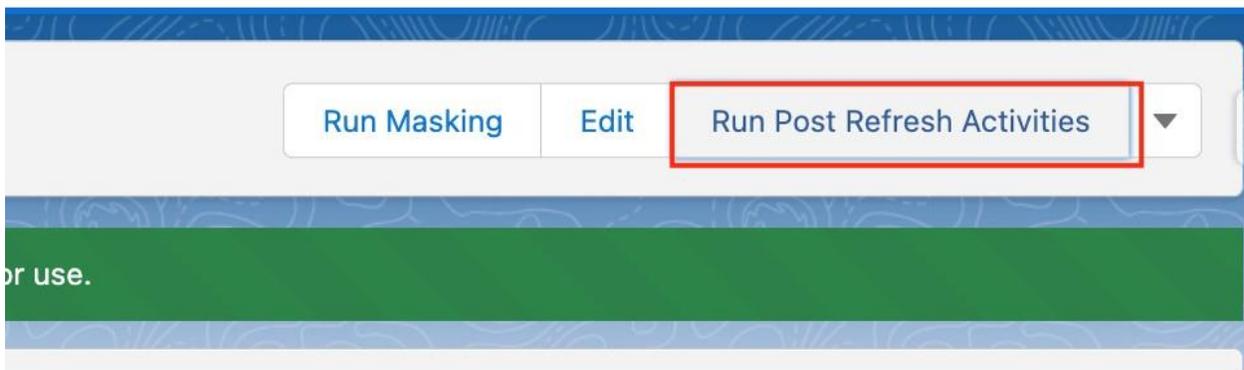
Exception Message

Cancel

Save & New

Save

- Navigate to -> Configuration section and click on the Run Post Refresh Activities button.



- Click on the Next button

Run Post Refresh Activities

Do you want to proceed with the Post Refresh Activities.

- Yes
 No

Next

- Click on the Finish button,

Run Post Refresh Activities

Your Post Refresh Activities Automation has been initiated. Depending upon your Configuration it may take several minutes.
Job Id: 7075j000017UN3T

Finish

- Now user can check that the Custom Label record has been updated in the Custom Label list.

Step 2: Update Remote Site Setting With Post Refresh Activities

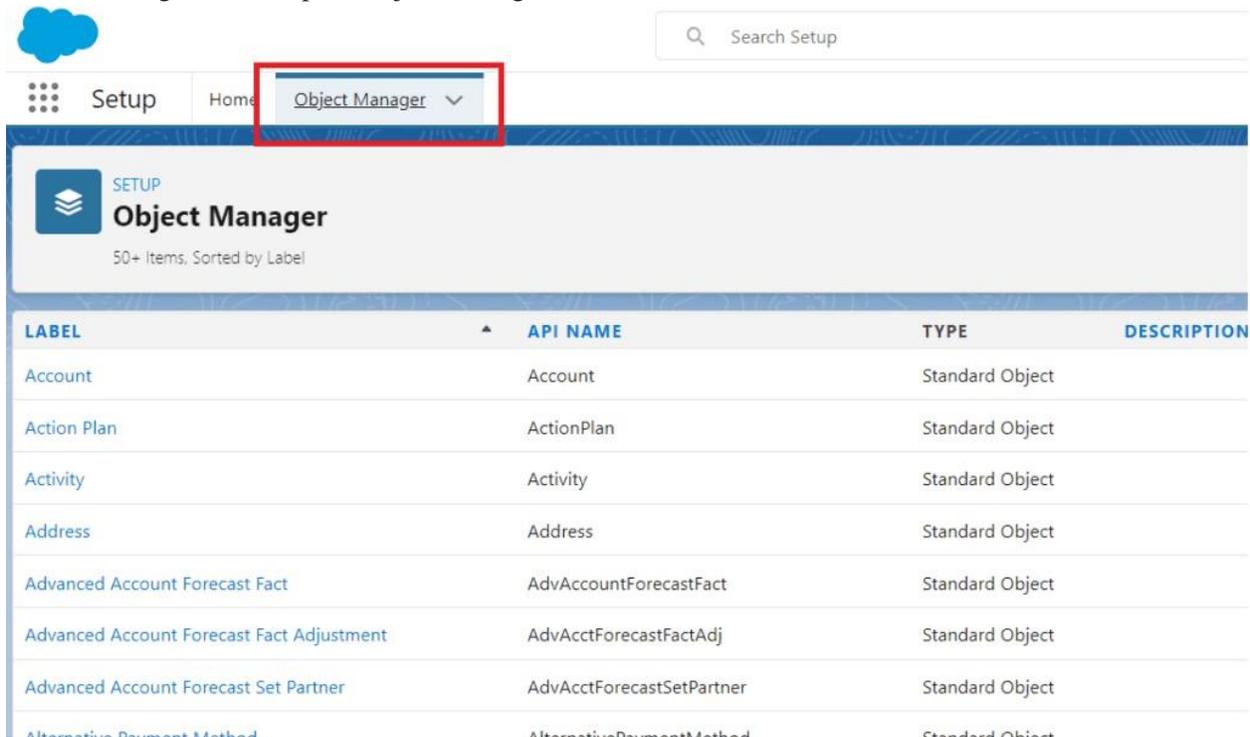
**This step is optional*

Prerequisites –

1. Assign "DM System Admin" permission set to the appropriate user.
2. Page layout assignment for Post Refresh Activities and Post Refresh Activity Details.

Page Layout Assignment for Post Refresh Activities

- Navigate → Setup → Object Manager tab



The screenshot shows the Salesforce Setup interface. The 'Object Manager' tab is selected and highlighted with a red box. The page displays a list of objects with the following columns: LABEL, API NAME, TYPE, and DESCRIPTION. The objects listed include Account, Action Plan, Activity, Address, Advanced Account Forecast Fact, Advanced Account Forecast Fact Adjustment, Advanced Account Forecast Set Partner, and Alternative Payment Method.

LABEL	API NAME	TYPE	DESCRIPTION
Account	Account	Standard Object	
Action Plan	ActionPlan	Standard Object	
Activity	Activity	Standard Object	
Address	Address	Standard Object	
Advanced Account Forecast Fact	AdvAccountForecastFact	Standard Object	
Advanced Account Forecast Fact Adjustment	AdvAcctForecastFactAdj	Standard Object	
Advanced Account Forecast Set Partner	AdvAcctForecastSetPartner	Standard Object	
Alternative Payment Method	AlternativePaymentMethod	Standard Object	

- Search "Post Refresh Activities" in the Quick Find box and press enter. Click on the object named "Post Refresh Activities" in the search result.



The screenshot shows the Salesforce Setup interface with the search box containing "Post Refresh Activities". The search results show one object, "Post Refresh Activities", which is highlighted with a red box. The object details are as follows:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Post Refresh Activities	poldm__Post_Refresh_Activities__c	Custom Object		3/11/2022	✓

- Click on "Page Layout" as shown below screenshot.



Post Refresh Activities

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Details

Description

API Name

pcldm__Post_Refresh_Activities__c

Custom



Singular Label

Post Refresh Activities

- Click on the 'Page Layout Assignment' button to add page layout.

Page Layouts
12 items, Sorted by Page Layout Name

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Custom Label Layout	Chetan Paunikar, 09/03/2022, 18:17	Chetan Paunikar, 09/03/2022, 18:18
Custom Metadata Layout	Chetan Paunikar, 09/03/2022, 18:18	Chetan Paunikar, 09/03/2022, 18:18
Custom Settings Layout	Chetan Paunikar, 09/03/2022, 18:18	Chetan Paunikar, 09/03/2022, 18:18
Email Alert Layout	Chetan Paunikar, 09/03/2022, 18:18	Chetan Paunikar, 09/03/2022, 18:18

- User will find a list of all the records types and their assigned page layouts
- Noe user needs to click on "Edit Assignment" to make changes

Page Layout Assignment Post Refresh Activities

[← Back to Custom Object: Post Refresh Activities](#)

The table below shows the page layout assignments for different record type and profile combinations.

Profiles	Record Types		
	Master	Custom Label	Custom Metadata
Analytics Cloud Integration User	Custom Label Layout	Custom Label Layout	Custom Label Layout
Analytics Cloud Security User	Custom Label Layout	Custom Label Layout	Custom Label Layout
Chatter External User	Custom Label Layout	Custom Label Layout	Custom Label Layout
Chatter Free User	Custom Label Layout	Custom Label Layout	Custom Label Layout
Chatter Moderator User	Custom Label Layout	Custom Label Layout	Custom Label Layout
Chatter Only User	Custom Label Layout	Custom Label Layout	Custom Label Layout
Company Communities User	Custom Label Layout	Custom Label Layout	Custom Label Layout
Contract Manager	Custom Label Layout	Custom Label Layout	Custom Label Layout
Identity User	Custom Label Layout	Custom Label Layout	Custom Label Layout
Marketing User	Custom Label Layout	Custom Label Layout	Custom Label Layout
Minimum Access - Salesforce	Custom Label Layout	Custom Label Layout	Custom Label Layout
Partner Community Login User	Custom Label Layout	Custom Label Layout	Custom Label Layout
Partner Community User	Custom Label Layout	Custom Label Layout	Custom Label Layout

- Select column "Remote Site Setting" and choose "remote site setting layout" from the drop-down list and click on the "Save" button.

Edit Page Layout Assignment
Post Refresh Activities

[Help for this Page](#)

The table below shows the page layout assignments for different record type and profile combinations. Use SHIFT + click or click and drag to select a range of adjacent cells. Use CTRL + click to select multiple cells that are not adjacent. Then choose a new page layout from the dropdown.

Save Cancel

Page Layout To Use: Remote site setting Layout 19 Selected 19 Changed

Profiles	Record Types			< Prev (5-8 of 12) Next >
	Email Alert	Email Template	Organization Wide Email Address	Remote site setting Layout
Analytics Cloud Integration User	Custom Label Layout	Custom Label Layout	Custom Label Layout	Remote site setting Layout
Analytics Cloud Security User	Custom Label Layout	Custom Label Layout	Custom Label Layout	Remote site setting Layout
Chatter External User	Custom Label Layout	Custom Label Layout	Custom Label Layout	Remote site setting Layout
Chatter Free User	Custom Label Layout	Custom Label Layout	Custom Label Layout	Remote site setting Layout
Chatter Moderator User	Custom Label Layout	Custom Label Layout	Custom Label Layout	Remote site setting Layout
Chatter Only User	Custom Label Layout	Custom Label Layout	Custom Label Layout	Remote site setting Layout
Company Communities User	Custom Label Layout	Custom Label Layout	Custom Label Layout	Remote site setting Layout
Contract Manager	Custom Label Layout	Custom Label Layout	Custom Label Layout	Remote site setting Layout
Identity User	Custom Label Layout	Custom Label Layout	Custom Label Layout	Remote site setting Layout
Marketing User	Custom Label Layout	Custom Label Layout	Custom Label Layout	Remote site setting Layout
Minimum Access - Salesforce	Custom Label Layout	Custom Label Layout	Custom Label Layout	Remote site setting Layout
Partner Community Login User	Custom Label Layout	Custom Label Layout	Custom Label Layout	Remote site setting Layout
Partner Community User	Custom Label Layout	Custom Label Layout	Custom Label Layout	Remote site setting Layout
Read Only	Custom Label Layout	Custom Label Layout	Custom Label Layout	Remote site setting Layout
Solution Manager	Custom Label Layout	Custom Label Layout	Custom Label Layout	Remote site setting Layout

Page Layout Assignment for Post Refresh Activity Details

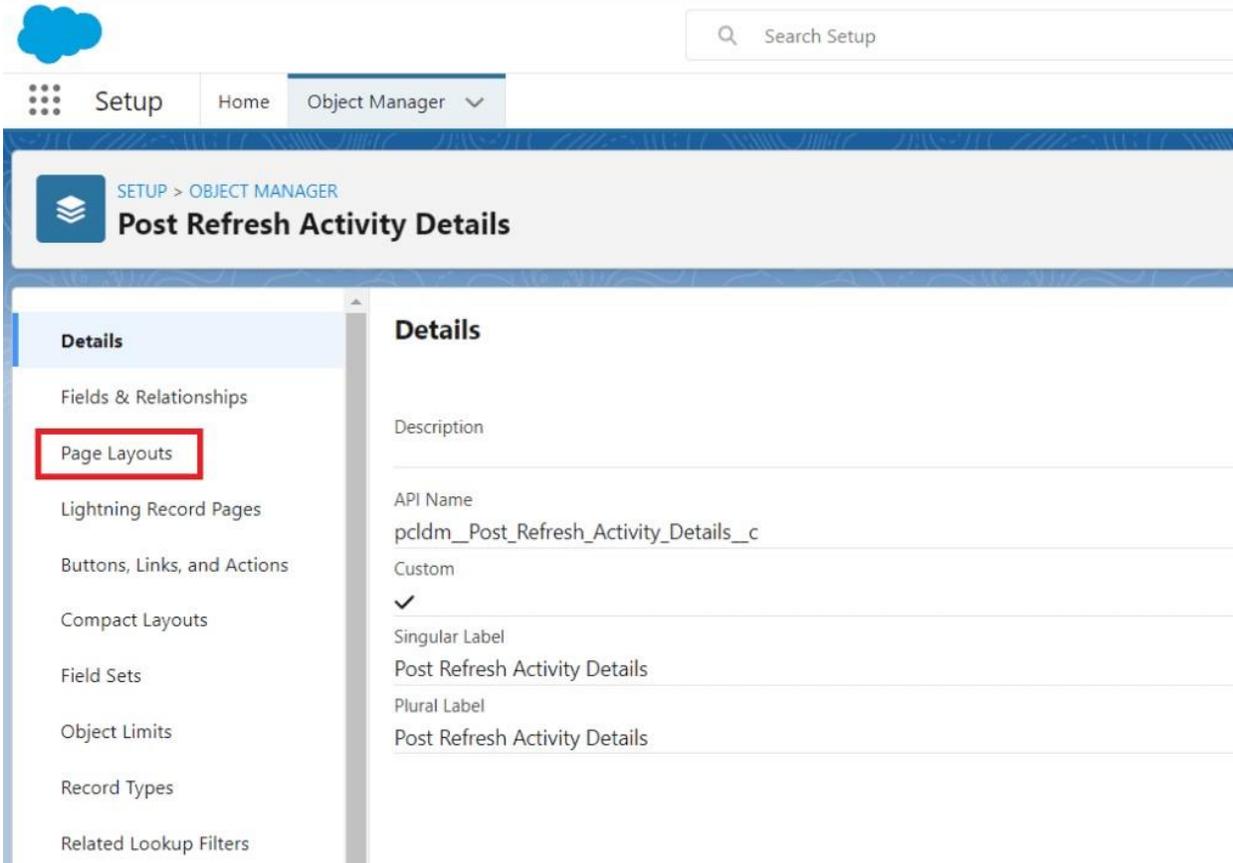
- Navigate → Setup → Object Manager tab

The screenshot shows the Salesforce Setup interface. The 'Object Manager' tab is highlighted with a red box. Below the navigation bar, the 'Object Manager' section is visible, showing a list of objects with columns for Label, API Name, Type, and Description. The list includes objects like Account, Action Plan, Activity, Address, and various forecast-related objects.

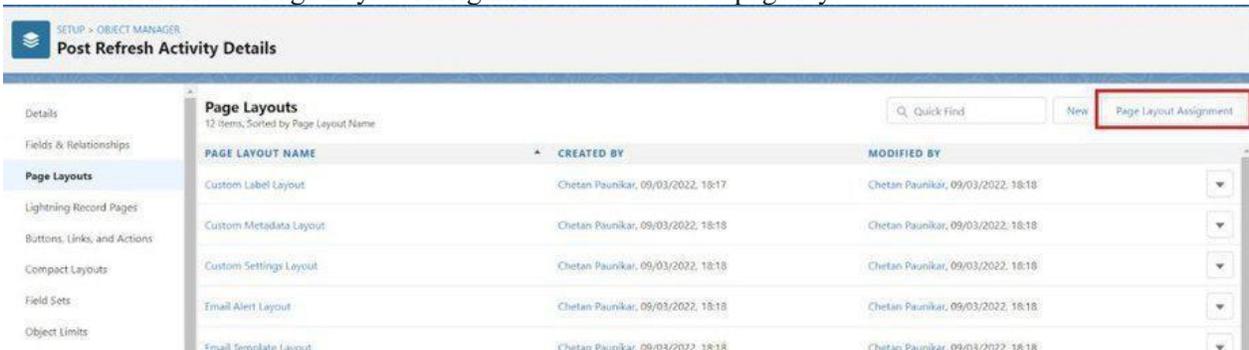
- Enter “Post Refresh Activity Details” in the Quick Find box and press enter.
- Click on the object named “Post Refresh Activity Details” in the search result.



- Click on “Page Layouts” as shown in the below screenshot.



- Click on the “Page Layout Assignment” button to add page layout.



- User will find a list of all the records types and their assigned page layouts
- Noe user needs to click on “Edit Assignment” to make changes

Page Layout Assignment
Post Refresh Activity Details

[← Back to Custom Object: Post Refresh Activity Details](#)

The table below shows the page layout assignments for different record type and profile combinations.

Edit Assignment				
Profiles	Record Types			
	Master	Custom Label	Custom Metadata	
Analytics Cloud Integration User	Custom Label Layout	Custom Label Layout	Custom Label Layout	
Analytics Cloud Security User	Custom Label Layout	Custom Label Layout	Custom Label Layout	
Chatter External User	Custom Label Layout	Custom Label Layout	Custom Label Layout	
Chatter Free User	Custom Label Layout	Custom Label Layout	Custom Label Layout	
Chatter Moderator User	Custom Label Layout	Custom Label Layout	Custom Label Layout	
Chatter Only User	Custom Label Layout	Custom Label Layout	Custom Label Layout	
Company Communities User	Custom Label Layout	Custom Label Layout	Custom Label Layout	
Contract Manager	Custom Label Layout	Custom Label Layout	Custom Label Layout	
Identity User	Custom Label Layout	Custom Label Layout	Custom Label Layout	
Marketing User	Custom Label Layout	Custom Label Layout	Custom Label Layout	
Minimum Access - Salesforce	Custom Label Layout	Custom Label Layout	Custom Label Layout	
Partner Community Login User	Custom Label Layout	Custom Label Layout	Custom Label Layout	
Partner Community User	Custom Label Layout	Custom Label Layout	Custom Label Layout	
Read Only	Custom Label Layout	Custom Label Layout	Custom Label Layout	
Solution Manager	Custom Label Layout	Custom Label Layout	Custom Label Layout	

Select column “Remote Site Setting” and choose “Remote Site Setting Layout” from the drop-down list and click on the “Save” button.

Edit Page Layout Assignment
Post Refresh Activity Details

[Help for this Page](#)

The table below shows the page layout assignments for different record type and profile combinations. Use SHIFT + click or click and drag to select a range of adjacent cells. Use CTRL + click to select multiple cells that are not adjacent. Then choose a new page layout from the dropdown.

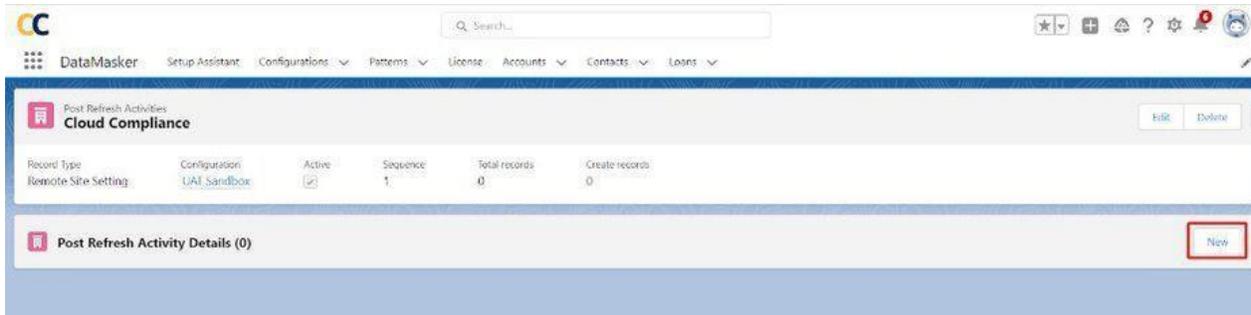
Save Cancel				
Page Layout To Use: Remote site setting Layout 19 Selected 19 Changed				
Profiles	Record Types			
	Email Alert	Email Template	Organization Wide Email Address	Remote Site Setting
Analytics Cloud Integration User	Custom Label Layout	Custom Label Layout	Custom Label Layout	Remote site setting Layout
Analytics Cloud Security User	Custom Label Layout	Custom Label Layout	Custom Label Layout	Remote site setting Layout
Chatter External User	Custom Label Layout	Custom Label Layout	Custom Label Layout	Remote site setting Layout
Chatter Free User	Custom Label Layout	Custom Label Layout	Custom Label Layout	Remote site setting Layout
Chatter Moderator User	Custom Label Layout	Custom Label Layout	Custom Label Layout	Remote site setting Layout
Chatter Only User	Custom Label Layout	Custom Label Layout	Custom Label Layout	Remote site setting Layout
Company Communities User	Custom Label Layout	Custom Label Layout	Custom Label Layout	Remote site setting Layout
Contract Manager	Custom Label Layout	Custom Label Layout	Custom Label Layout	Remote site setting Layout
Identity User	Custom Label Layout	Custom Label Layout	Custom Label Layout	Remote site setting Layout
Marketing User	Custom Label Layout	Custom Label Layout	Custom Label Layout	Remote site setting Layout
Minimum Access - Salesforce	Custom Label Layout	Custom Label Layout	Custom Label Layout	Remote site setting Layout
Partner Community Login User	Custom Label Layout	Custom Label Layout	Custom Label Layout	Remote site setting Layout
Partner Community User	Custom Label Layout	Custom Label Layout	Custom Label Layout	Remote site setting Layout
Read Only	Custom Label Layout	Custom Label Layout	Custom Label Layout	Remote site setting Layout
Solution Manager	Custom Label Layout	Custom Label Layout	Custom Label Layout	Remote site setting Layout

Remote Site Setting –

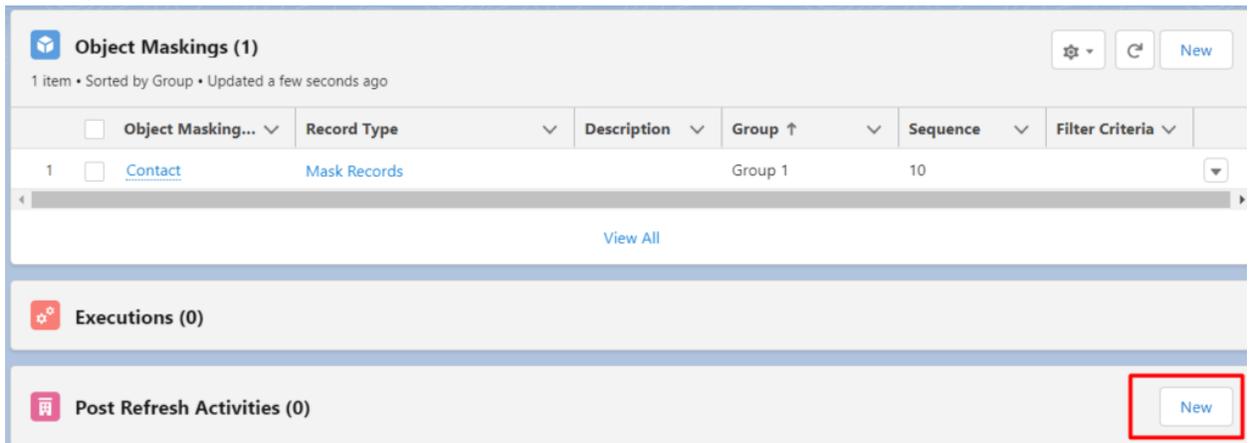
Using Data Masker users can update Remote Site Settings

Solution Steps –

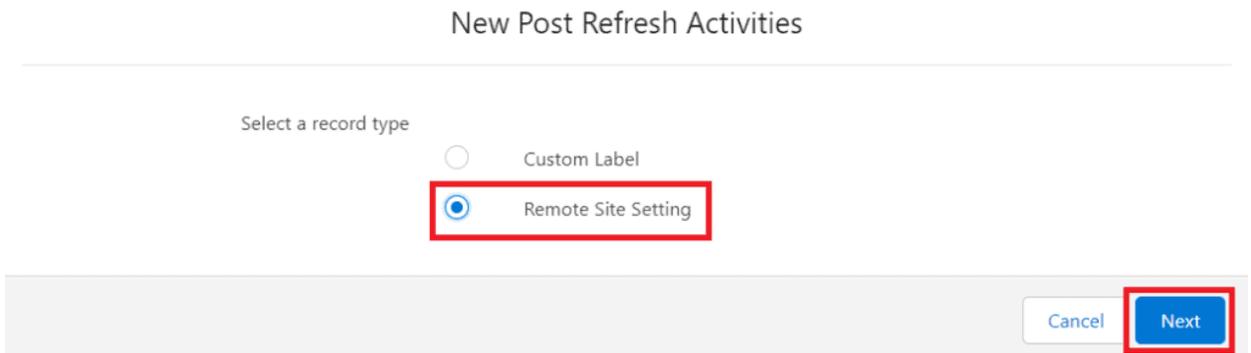
1. Navigate → Configuration tab and open the configuration record.



2. Now scroll down to the “Post Refresh Task” section. To create a new Post Refresh Activity record, click on the New button.



3. Select record type “Remote Site Setting” and click the “Next” button



4. Give the Post Refresh Name and Sequence as per the requirement and make sure to Active the checkbox.

New Post Refresh Activities: Remote Site Setting

Information

* Post Refresh Name Record Type Remote Site Setting

* Configuration Active

Description Sequence

5. Users can See “Remote Site Setting” is added to the list view of Post Refresh Activities then click on the record link to add Post Refresh Activity Details

Configurations > UAT Sandbox
Post Refresh Activities
1 item • Updated a few seconds ago

	Post Refresh Name	Record Type	Active	Sequence	Description	Tc
1	Cloud Compliance	Remote Site Setting	<input checked="" type="checkbox"/>	1		0

6. Click on the “New” button to create a record of the Post Refresh Activity Details record.

CC

Data Masker Configurations Patterns License Accounts Contacts Employees

Post Refresh Activities
Cloud Compliance Edit Delete

Record Type: Remote Site Setting Configuration: UAT Sandbox Active: Sequence: 1 Total records: 0 Create records: 0

Post Refresh Activity Details (0)

7. Select record type “Remote Site Setting” and click the “Next” button.

New Post Refresh Activities

Select a record type

Custom Label

Remote Site Setting

The Remote Site Setting has edit operation –

- **Edit** – Enter the value that the user wants to replace with the existing value and click on the Save button

Make sure to add the appropriate “Remote Site Setting” name in the right format and click on the Save button

New Post Refresh Activity Details: Remote Site Setting

Information

* Post Refresh Activities
Cloud Compliance

* Operation
Edit

Remote Site Setting

* Remote Site Name
CC_APP

Remote Site URL
http://www.cloudcompliance.app

Disable Protocol Security

Active

Description

Post Refresh Activity Execution Details

Status
None

Exception Message

Note: The Remote Site Setting API name can only contain underscores and alphanumeric characters. It must be unique, begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores.

The URL protocol, URL should start with http:// or https://

New Post Refresh Activity Details: Remote Site Setting

Information

* Post Refresh Activities: Cloud Compliance ✕

* Operation: Edit ▼

Remote Site Setting

* Remote Site Name: CC_APP ↶

Remote Site URL: http://www.cloudcompliance.app ↶

Disable Protocol Security:

Active:

Description:

Post Refresh Activity Execution Details

Status: None ▼

Exception Message:

Cancel Save & New Save

User can see the record of Remote Site Setting in the Post Refresh Activities Details.

Record Type	Configuration	Active	Sequence	Total records	Create records
Remote Site Setting	UAT Sandbox	<input checked="" type="checkbox"/>	1	1	0

Sequence	Remote Site Name	Remote Site URL	Operation	Status	Exception ...
1	CC_APP	http://www.cloudcompliance.app	Edit		

8. After saving the record, go back to the configuration detail page and click on the “Run Post Refresh Activities” button

Run Masking Edit **Run Post Refresh Activities**

✔ Congratulations! DataMasker setup is complete and ready for use.

Object Maskings (1)

1 item • Sorted by Group • Updated 3 minutes ago

<input type="checkbox"/>	Object Masking...	Record Type	Description	Group	Sequence	Filter Criteria
1	Contact	Mask Records		Group 1	10	

[View All](#)

Executions (0)

Post Refresh Activities (1)

1 item • Updated a few seconds ago

<input type="checkbox"/>	Post Refresh Name	Record Type	Active	Sequence	Desc
1	PRA	Remote Site Setting	<input checked="" type="checkbox"/>		

9. Check the radio button “Yes” to proceed with the post refresh activities and click on the “Next” button to continue.

Run Post Refresh Activities

Do you want to proceed with the Post Refresh Activities.

Yes
 No

Next

10. Click on the “Finish” button

Run Post Refresh Activities

Your Post Refresh Activities Automation has been initiated. Depending upon your Configuration it may take several minutes.
Job Id: 7074L00001H1mEZ

Finish

11. User can see the Remote Site Setting record is edited as per the action defined.

SETUP
Remote Site Settings

All Remote Sites Help for this Page

Below is the list of Web addresses that your organization can invoke from salesforce.com. To add another Web address, click New Remote Site.

View: All Remote Sites Create New View

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | **AR**

New Remote Site									
Action	Remote Site Name	Namespace Prefix	Remote Site URL	Active	Created By	Created Date	Last Modified By	Last Modified Date	
Edit Del	CC_App	-	https://www.cloudcompliance.aqa	<input checked="" type="checkbox"/>	Paunikar_Chetan	10/03/2022, 16:17	Paunikar_Chetan	10/03/2022, 16:17	

Integrate - APIs & DevOps

Step 1: Run DataMasker From 3rd Party Tools Via REST API

**This step is Optional*

Overview

Data Masking is a process to mask all sensitive data available in Sandbox which will prevent developers or other users from viewing sensitive data. In the particular use cases where the Data Masking needs to be invoked by an external system, Cloud Compliance offers a REST API interface for masking sensitive data.

You can automate running Data Masking from Enterprise schedulers like Tidal, KRON & others that can make a REST API call.

This document explains how to invoke Data Masking configurations that are pre-configured via REST API using a JSON-based callout. The API performs data masking of sensitive data in the relevant sandbox whose details are provided in the configuration.

The REST APIs that are developed for this requirement are as follows –

1. POST Request: This is the 1st API that is used to execute data masking via REST.

URL

```
/services/apexrest/pcldm/v1/DataMaskerService
```

Request Body

```
{  
  "dataMaskingRequest": {  
    "maskingId": "cff536a0adbf672d982a4136088fbe9e"  
  }  
}
```

2. POST Request: This is the second API that is used to retrieve the Status of masking after the execution is completed.

URL

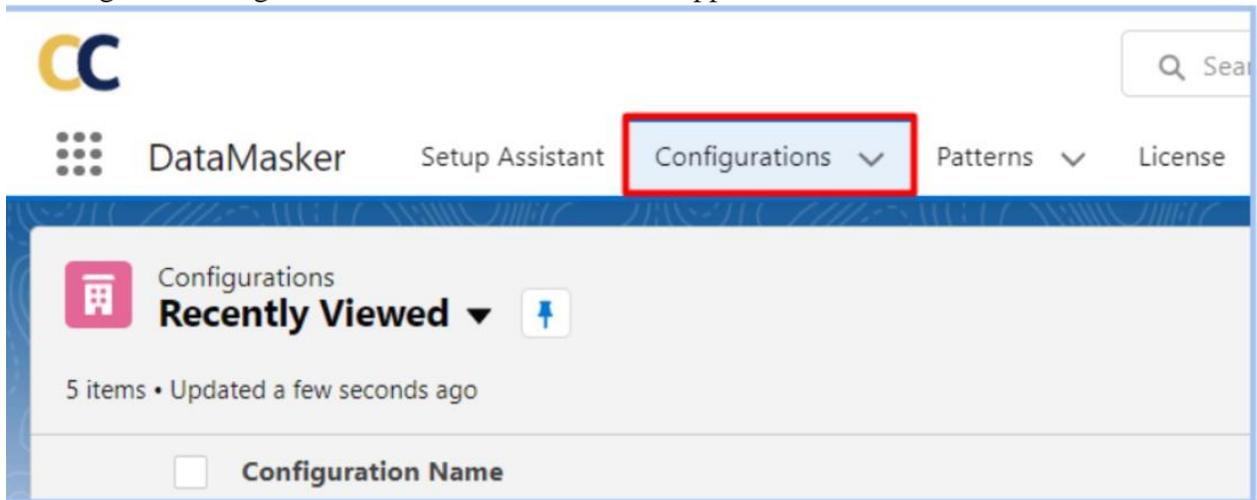
```
/services/apexrest/pcldm/v1/FetchMaskingStatus
```

Request Body

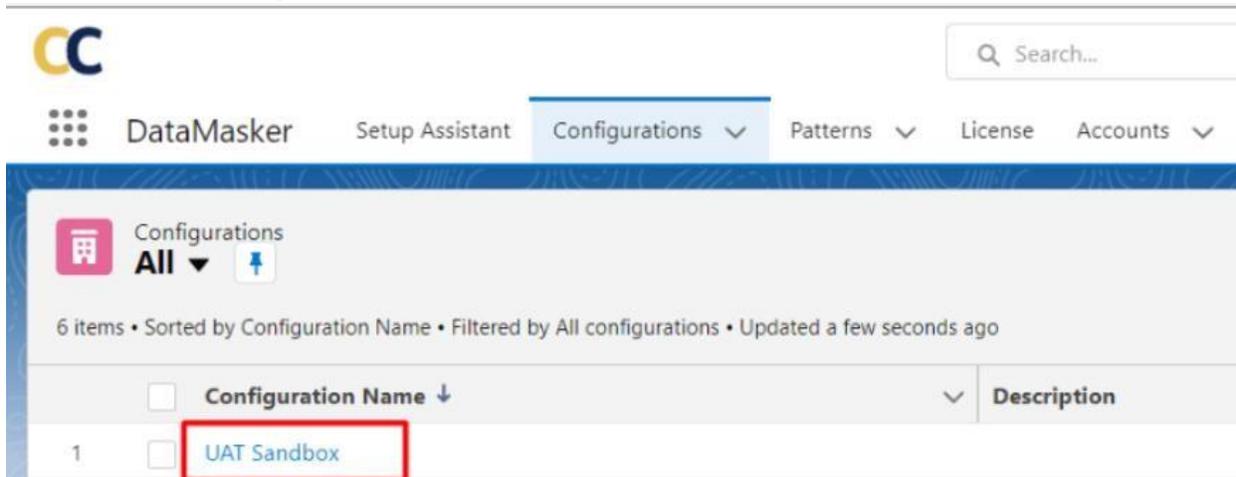
```
{  
  "dataMaskingRequest": {  
    "executionId": "a043h00000QvyytAAB"  
  }  
}
```

Solution Steps

1. Navigate->Configurations tab of the Data Masker application.



2. Click on the Configuration name. In this case, click on 'UAT sandbox'.



3. Copy the Configuration id and paste this id into the REST script that needs to be executed for data masking.



Configuration

APEX API - UAT Sandbox

Description ⓘ

Data Masking configuration for UAT Sandbox

▼ Delete Settings

Attachments & Files ⓘ



Events ⓘ



Notes ⓘ



Tasks ⓘ



Chatter ⓘ



Emails ⓘ



Case Comments ⓘ



▼ Advanced Settings

Configuration Id ⓘ

1f0073ddb5033b591303342af52db1ef



Retry Count

0



Notify Users ⓘ

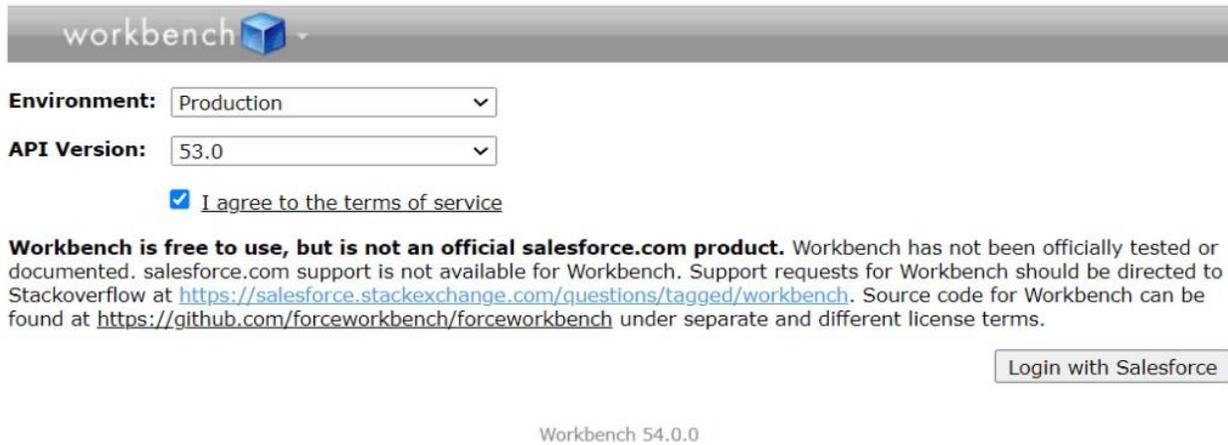


Activate Users ⓘ

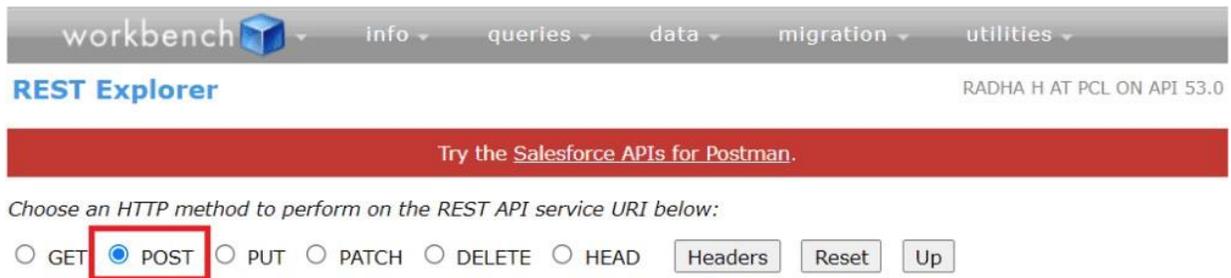


4. Navigate-> REST tool such as Salesforce developer workbench, Postman, Insomnia, etc.

(This example uses Salesforce Developer Workbench)



5. Navigate-> ‘REST Explorer’ from the Utility tab within the workbench and select the “POST” method



6. For the “POST” method, enter the DataMaskerService REST call URL

/services/apexrest/pcldm/v1/DataMaskerService

7. Copy the Configuration id and paste it in the following JSON format of the request body.

```
{
  "dataMaskingRequest": {
    "maskingId": "58dbdf18d60675f69638b45445556f8b"
  }
}
```

workbench  info queries data migration utilities

REST Explorer RADHA H AT PCL ON API 53.0

Try the [Salesforce APIs for Postman](#).

Choose an HTTP method to perform on the REST API service URI below:

GET POST PUT PATCH DELETE HEAD Headers Reset Up

/services/apexrest/pcldm/v1/DataMaskerService Execute

Request Body

```
{
  "dataMaskingRequest": {"maskingId": "58dbdf18d60675f69638b45445556f8b" }
}
```

8. Click the “Execute” button to invoke the REST API

workbench  info queries data migration utilities

REST Explorer RADHA H AT PCL ON API 53.0

Try the [Salesforce APIs for Postman](#).

Choose an HTTP method to perform on the REST API service URI below:

GET POST PUT PATCH DELETE HEAD Headers Reset Up

/services/apexrest/pcldm/v1/DataMaskerService **Execute**

Request Body

```
{
  "dataMaskingRequest": {"maskingId": "58dbdf18d60675f69638b45445556f8b" }
}
```

9. The REST API returns a Success status as True or False and the execution Id.

Try the Salesforce APIs for Postman.

Choose an HTTP method to perform on the REST API service URI below:

GET POST PUT PATCH DELETE HEAD Headers Reset Up

Execute

Request Body

```
{  
  "dataMaskingRequest": {"maskingId": "58dbdf18d60675f69638b45445556f8b" }  
}
```

[Expand All](#) | [Collapse All](#) | [Show Raw Response](#)

```
status: true  
executionId: a045j000008VCN0AAO
```

10. Use the 2nd REST API to get the execution status. Copy the execution id retrieved from the First API call and pass it to the second API to get the execution details. Again this is the POST method used to fetch the details.

URL

```
{  
  "dataMaskingRequest": {  
    "executionId": "a045j000008VCN0AAO"  
  }  
}
```

Request Body

workbench  info queries data migration utilities

REST Explorer RADHA H AT PCL ON API 53.0

Try the Salesforce APIs for Postman.

Choose an HTTP method to perform on the REST API service URI below:

GET POST PUT PATCH DELETE HEAD Headers Reset Up

/services/apexrest/pcldm/v1/FetchMaskingStatus Execute

Request Body

```
{
  "dataMaskingRequest" :
  {
    "executionId": "a045j000008VCN0AAO"
  }
}
```

11. Click on Execute to get the execution details. The attributes extracted from this REST API call out are as follows –

- **status:** true
- **isProcessCompleted:** true
- execution
 - **sfId:** a045j000008VCN0AAO
 - **recordUrl:** <https://scaleplabs.my.salesforce.com/a045j000008VCN0AAO>
 - **recordsTotal:** 23
 - **recordsProcessed:** 23
 - **recordsErrored:** 0
 - **maskingStatus:** Completed
 - **executionType:** All

Try the Salesforce APIs for Postman.

Choose an HTTP method to perform on the REST API service URI below:

GET POST PUT PATCH DELETE HEAD Headers Reset Up

/services/apexrest/pcldm/v1/FetchMaskingStatus Execute

Request Body

```
{
  "dataMaskingRequest":
  {
    "executionId": "a045j000008VCN0AAO"
  }
}
```

Expand All | Collapse All | Show Raw Response

- status: true
- isProcessCompleted: true
- execution
 - sfId: a045j000008VCN0AAO
 - recordUrl: https://pcl-af-dev-ed.my.salesforce.com/a045j000008VCN0AAO
 - recordsTotal: 23
 - recordsProcessed: 23
 - recordsErrored: 0
 - maskingStatus: Completed
 - executionType: All

12. The detail raw response is as follows:

```
HTTP / 1.1 200 OK
Date: Fri, 04 Mar 2022 11: 35: 36 GMT
Set - Cookie: CookieConsentPolicy = 0: 1;
path = /;
expires = Sat, 04 - Mar - 2023 11: 35: 36 GMT;
Max - Age = 31536000 Set - Cookie: LSKey - c$CookieConsentPolicy = 0: 1;
path = /;
expires = Sat, 04 - Mar - 2023 11: 35: 36 GMT;
Max - Age = 31536000 Strict - Transport - Security: max - age = 63072000;
includeSubDomains X - Content - Type - Options: nosniff X - XSS - Protection: 1;
mode = block X - Robots - Tag: none Cache - Control: no - cache, must - revalidate, max -
age = 0, no - store,
private Set - Cookie: BrowserId = NbheW5uvEey1zs2_8w2v5Q;
```

```
domain = .salesforce.com;
path = /;
expires = Sat, 04 – Mar – 2023 11: 35: 36 GMT;
Max – Age = 31536000 Content – Type: application / json Vary: Accept – Encoding Content –
Encoding: gzip Transfer – Encoding: chunked {
“status”: true,
“isProcessCompleted”: true,
“execution”: {
“sfId”: “a045j000008VCN0AAO”,
“recordUrl”: “https://pcl-af-dev-ed.my.salesforce.com/a045j000008VCN0AAO”
“,
“recordsTotal”: 23,
“recordsProcessed”: 23,
“recordsErrored”: 0,
“maskingStatus”: “Completed”,
“executionType”: “All”
}
}
```

Step 2: Run DataMasker From DevOps – Copado

**This step is Optional*

Overview

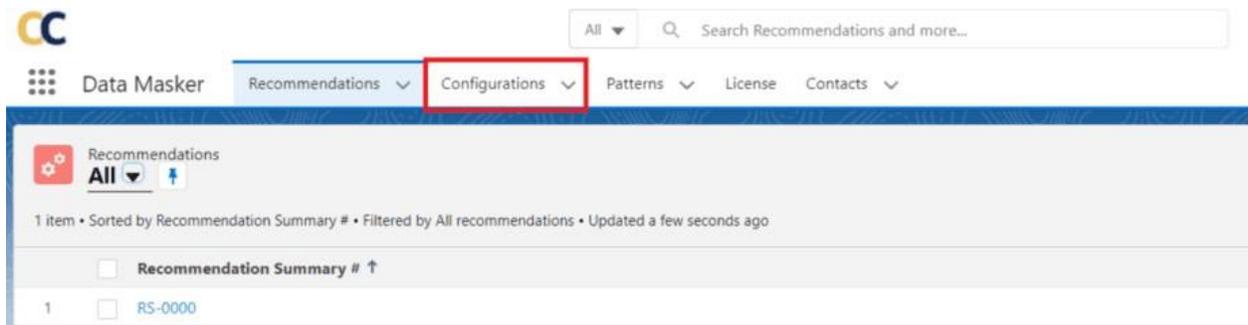
Data Masking is a process to mask all sensitive data available in Sandbox which will prevent developers or other users from viewing sensitive data. In the particular use cases where the Data Masking needs to be invoked by an external system, Cloud Compliance offers an API interface for masking sensitive data.

You can automate your Data Masking to be triggered from leading DevOps & CI/CD tools such as Copado, Gearset, Jenkins, AutoRABIT, Flosum, or GitHub.

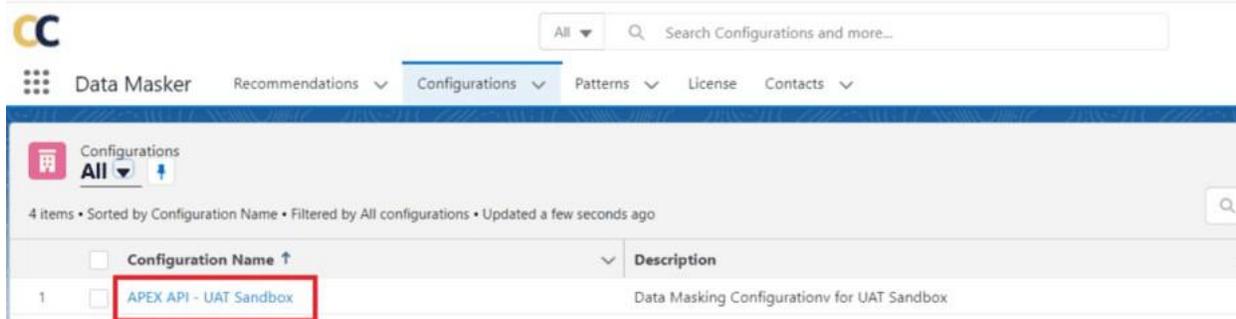
This document explains how to invoke Data Masking configurations that are pre-configured via APEX based callout. The API performs data masking of sensitive data in the relevant sandbox whose details are provided in the configuration.

The APEX APIs that are developed for this requirement are as follows –

1. Navigate->Configurations tab of the Data Masker application.



2. Click on the Configuration name. In this case, Click on ‘APEX API – UAT sandbox’.



3. Copy the Configuration id and paste this id in the APEX API script that needs to be executed for data masking.

The screenshot displays the Copado Release Management application interface. At the top, there is a navigation bar with the Copado logo (CC) on the left and a search bar on the right containing the text "Search Configurations and more...". Below the navigation bar, a menu includes "Data Masker", "Recommendations", "Configurations", "Patterns", "License", and "Contacts". The main content area is titled "Configuration APEX API - UAT Sandbox". Underneath, there are two tabs: "Configuration Details" (which is active) and "Advance Configuration". A dropdown arrow is visible above the details section. The details section contains a table with the following information:

Configuration Name	APEX API - UAT Sandbox	Configuration Id	58dbdf18d60675f69638b45445556f8b
Description	Data Masking Configurationv for UAT Sandbox		

The "Configuration Id" value is highlighted with a red rectangular box.

Solution Steps

1. Navigate-> Copado Release Management app and Make sure that 'Destination org' should be connected in Deployments.

The screenshot shows the Copado Release Manager interface. At the top, there is a navigation bar with 'Copado Release Ma...', 'Home', 'Getting Started', 'Deployments', and 'Snapshot Differences'. The 'Deployments' menu is highlighted with a red box. Below this, the main header displays 'DEPLOYMENT CI Deployment - UAT Sandbox'. A summary row shows 'Source Org: Copado', 'Status: Completed Successfully', and 'Promotion'. The 'Information' section contains fields for 'Deployment Name' (CI Deployment - UAT Sani), 'Send Deployment Complete email' (checked), 'Attach Deployment File' (unchecked), 'Source Org' (Copado), and 'To Org' (pre-release-sg). The 'To Org' field is highlighted with a red box. Below the information section is a table with columns: ACTION, STEP NAME, TYPE, CHECKONLY, and PRE-RELEASE-SG. The table contains one row: 'Apex Call to Data Masker', 'Apex', and a green flag. Below the table is a 'Details' section for the 'Apex' step, showing the 'Apex Script' field with the value: `pcldm.DM_DataMaskingService.execute('5856347d64232790a3157ca39f341477');`. This script value is highlighted with a red box.

2. Select 'Apex' from the type of call-outs and use our Data Masking API to execute data masking. The input parameter is the Configuration Id which was copied above for eg. '5856347d64232790a3157ca39f341477'
`pcldm.DM_DataMaskingService.execute('5856347d64232790a3157ca39f341477');`
3. Click on 'Deploy' and then 'Deploy All'

Status Deploy Cancel Deployment View Deployment Status Show Hook URL

Close Deploy All Deploy Outstanding

Deploy now or later? * Required Information

Deploy now ▾

STEP NAME	CHECKONLY	TOTAL CREDITS	OUTSTANDING CREDITS
Apex Call to Data Masker	<input type="checkbox"/>		1
		Total credits estimated	1
			Destination Orgs 1

Close Deploy All Deploy Outstanding

4. Check The Status

Status Deploy Cancel Deployment View Deployment Status Show Hook URL

Status **Completed Successfully**

Date ⓘ 13/07/2021 2:11 PM

% Completed 100%

Compliance Status

Last Compliance Scan Date

Last Modified By [Aniket Save](#)

Last Modified Date 13/07/2021 2:11 PM

Copado Deployment History

ACTION	COPADO DEPLOYMENT HISTORY NAME	EVENT	OBJECT	FIELD	OLD VALUE	NEW VALUE
1 Edit Del	CDH-0000150	Updated	Deployment	Status	In progress	Completed Successfully

5. You can check the execution status in the Data masker.

Executions (1) [New](#)

1 item • Updated a few seconds ago

Execution Na...	Execution Status	Batch Status	Records To...	Records Pr...	Records Er...	Start time	End time
1 <input type="checkbox"/> Execution-0000	Completed	Completed	1	1	0	29/6/2021, 10:36 pm	29/6/2021, 10:36 pm

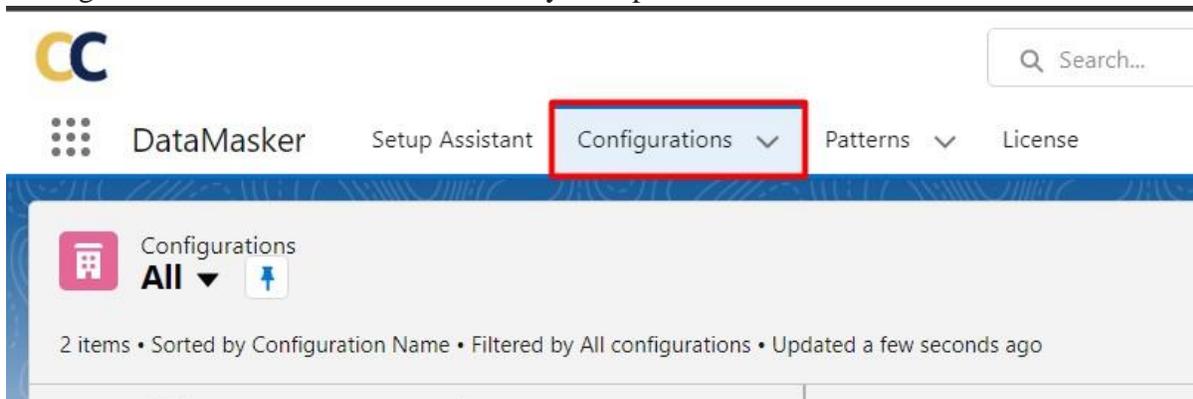
Go-live-Data Masking

Data Masker -Import/Export Wizard

In the Data Masker application, the user can create a Configuration that is used for the Data Masking process. This document showcases how Data Masker Configuration can be transferred from one org to another in order to efficiently migrate data from sandbox to production using the Import/Export feature of the Data Masker application.

Note – This feature is available from DM 1.26 Release version onwards.

Solution Steps – 1. Navigate to the Configuration tab in the application. User will see all the Configurations which are created and ready to export.



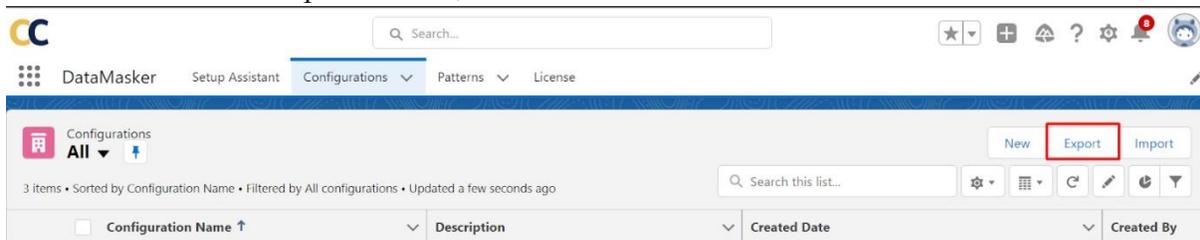
Users will find the **Export** and **Import** button on this page.

Export- The user can Export the Configuration from the current org and can import it to the current or destination org.

Import – The user can import the mapping which is exported from the source org.

Note- While importing the Configuration user needs to make sure that all the objects, fields and Patterns which are available in the Exported file(JSON file) are available in the Destination org.

2. User will see the 'Export' button, Click on it.



Here, the user will see all the configurations that the user can Export, the configurations which are not required to export the user can cancel by clicking on the 'Close' symbol.

The screenshot shows the DataMasker interface with the following elements:

- Header: CC logo, search bar, and navigation icons (star, plus, trash, question mark, gear, notification, user).
- Navigation: DataMasker, Setup Assistant, Configurations (selected), Patterns, License.
- Section: Configurations (with a Close button).
- Table:

Name	Description	
Data Masker Configuration	Data Masker Configuration to mask all the records	X
Sandbox - Data Masking Configuration	Data Masker Configuration for Sandbox	X

Reset Cancel Download

After closing the unnecessary Configuration user will see only the Configuration that needs to be exported.

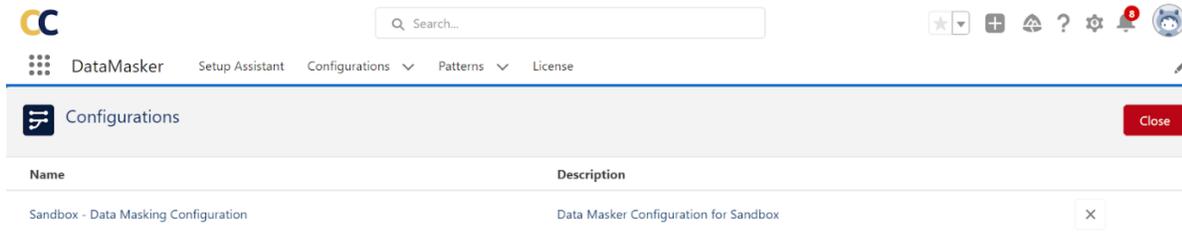
The screenshot shows the DataMasker interface with the following elements:

- Header: CC logo, search bar, and navigation icons (star, plus, trash, question mark, gear, notification, user).
- Navigation: DataMasker, Setup Assistant, Configurations (selected), Patterns, License.
- Section: Configurations (with a Close button).
- Table:

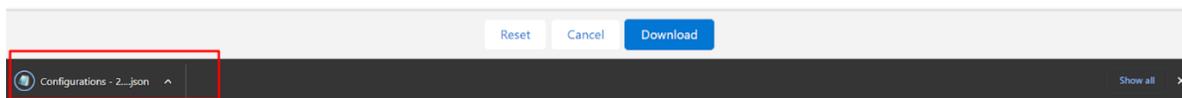
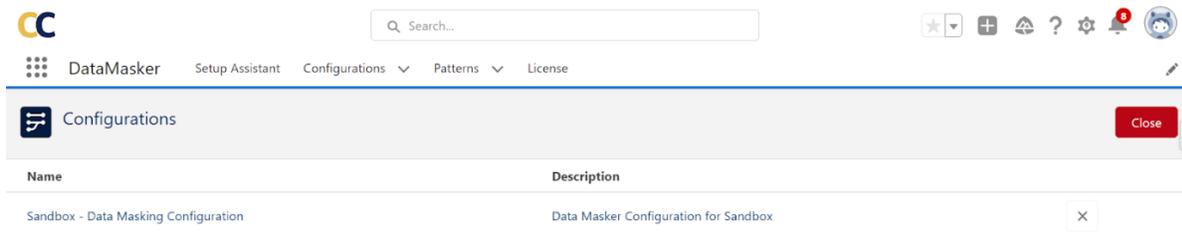
Name	Description	
Sandbox - Data Masking Configuration	Data Masker Configuration for Sandbox	X

Reset Cancel Download

3. Click on the 'Download' button to save the configuration in the System. It will download the file in the format of JSON.



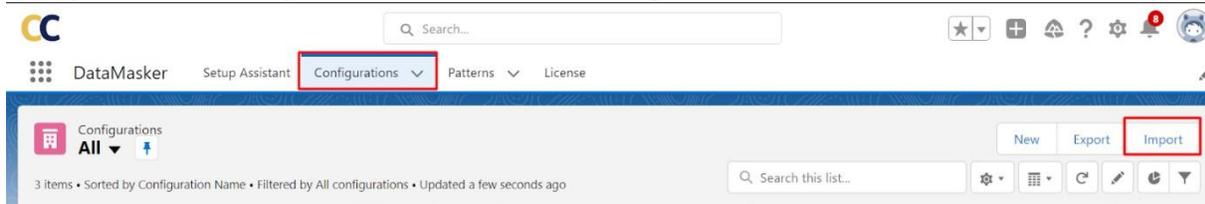
After clicking on the 'Download' button the file will be downloaded



All set, the Configuration is Downloaded successfully.

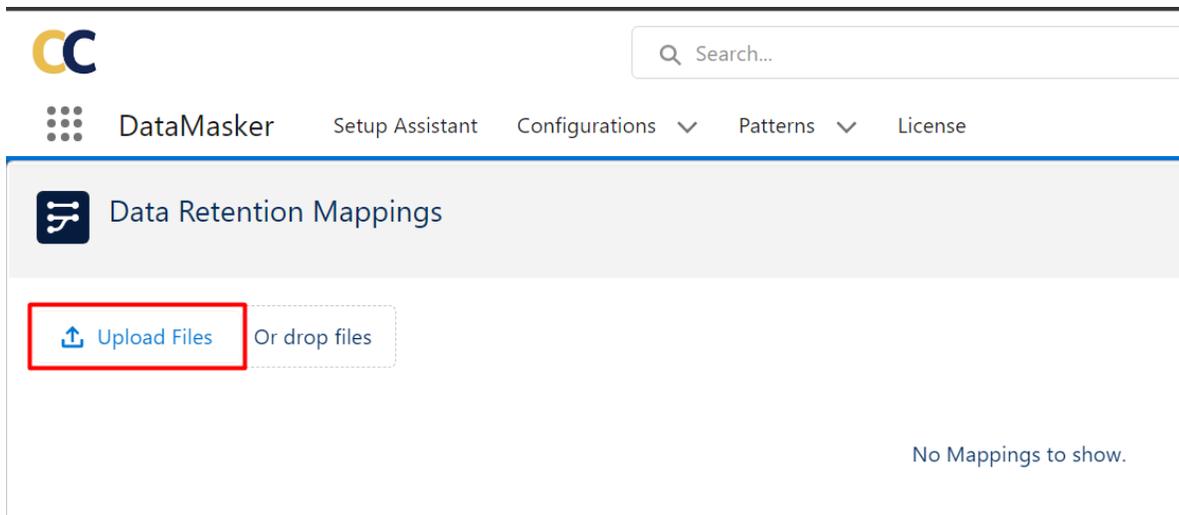
4. Now, go to the Destination org in which the user wants to Import the Configuration to run the Data Masker.

Navigate to the Configuration tab, the user will Import Button there.

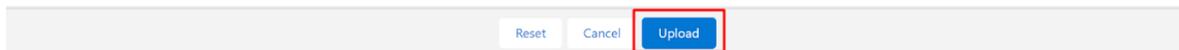
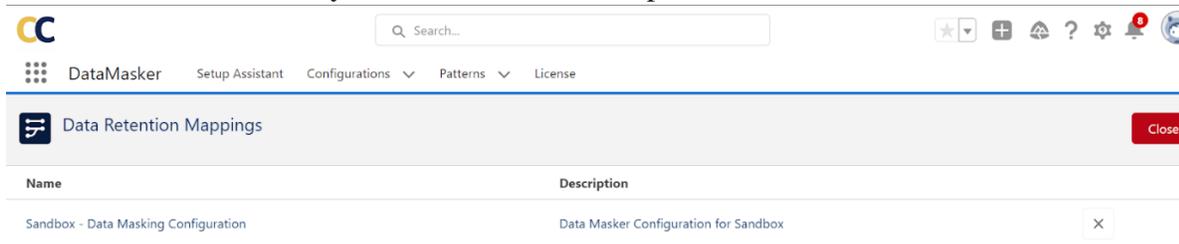


5. Click on the 'Import' button, it will take the user to the page where the user needs to upload the JSON file which is to be imported into the destination org.

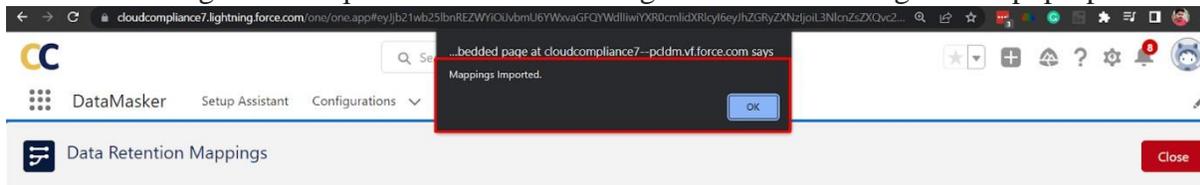
Click on the Upload Files button



6. Select a file from the System and click on the Upload button



7. After clicking on the 'Upload' button user will get a Success message in the pop-up.



8. Now click on the Close button to close the window

Here the user has successfully imported the mapping from the Source org to Destination org. Likewise, the user can migrate the Data Masker configuration between the orgs without losing the information.

Import/Export handles Patterns during migration –

Data Masker handles the Patterns while importing the Configuration from Source org to destination org.

If Destination org doesn't have the patterns which are exported from the source org, then the patterns will be created automatically after importing and will be assigned to the respective field masking so that the user doesn't need to create patterns manually for importing the configuration.

If the pattern is already available in the destination org, Data Masker updates the Pattern values as per the values stored in the exported file so that it will not create a duplicate pattern after migration.

Troubleshooting DataMasker

Identify Bulk Job Exceptions

DataMasker uses Bulk API 2.0 to mask records. Sometimes records being updated by Bulk Job can fail because of an underlying exception. Bulk API 2.0 provides REST endpoints that allow admins to fetch a raw response that shows exception records. Here are the steps to get the exception raw response.

Identify Bulk Jobs with errors

```
SELECT
    pcdm_Type__c,
    pcdm_Entity_Id__c,
    pcdm_Records_Total__c,
    pcdm_Records_Processed__c,
    pcdm_Records_Errored__c
FROM
    pcdm_Entity_Log__c
WHERE
    pcdm_Type__c = 'Bulk Job Id'
    AND pcdm_Records_Errored__c > 0
    AND pcdm_Execution_Log__r.pcdm_Execution__r.Name='Execution-XXXX'
```

Update Execution-XXXX with the name of your execution. This SOQL will return the Bulk Job ID in the 2nd column(pcdm_Entity_Id__c). Make a note of these Bulk Job IDs, we will need them in the next step.

Login to workbench.salesforce.com

Use your Salesforce credentials and select the latest API version from the drop-down.



Once you are in the workbench, navigate to Utilities->Rest Explorer and execute the REST endpoint as shown below

workbench info queries data migration utilities

REST Explorer RAHUL GUPTA AT CALLMEAT ON API 56.0

Try the [Salesforce APIs for Postman](#).

Choose an HTTP method to perform on the REST API service URI below:

GET POST PUT PATCH DELETE HEAD Headers Reset Up

/services/data/v56.0/jobs/ingest/750DE000006dnTH/failed Execute

Requested in 0.003 sec
Workbench 56.0.0

Example: Rest Call

/services/data/v56.0/jobs/ingest/750DE000006dnTH/failedResults

Note: Update the version from v56.0 to the latest one and replace the '750DE000006dnTH' with your Bulk Job ID

Generate Exception Logs

Data masking is a complex operation and can run into issues because of a variety of reasons- Data, Metadata, and Salesforce Platform limitations. DataMasker has a way to capture exceptions in a custom object. This functionality only needs to be enabled, if Cloud Compliance support requests so.

Here are the steps:

Step 1: Search Custom Metadata Type

In your Salesforce Org, search for "Custom Metadata Types"

The screenshot shows the Salesforce Setup interface. At the top left is the Salesforce logo. To its right is a search bar labeled "Search Setup". Below the logo is a navigation bar with "Setup", "Home", and "Object Manager" (with a dropdown arrow). A search bar on the left contains the text "custom metadata". Below it, a dropdown menu is open under "Custom Code", with "Custom Metadata Types" highlighted in a red box. Below the dropdown is the text "Didn't find what you're looking for? Try using Global Search." The main content area on the right has a header "SETUP Home" with a home icon. Below the header is a banner for "Activate Digital Trust Cards" with a laptop icon showing a checklist. The banner text reads: "Show your teams and customers how you'll safely re business during COVID." Below the banner are two buttons: "Get Started" and "Learn More". At the bottom of the main content area is the section "Most Recently Used".

Step 2: Update Metadata Value

Click on 'Manage Records' for 'DM App Config'



SETUP

Custom Metadata Types

All Custom Metadata Types

Custom metadata types enable you to create your own setup objects whose records are metadata rather than data. These are typically used to define application configurations that to another, or packaged and installed.

Rather than building apps from data records in custom objects or custom settings, you can create custom metadata types and add metadata records, with all the manageability that upgrade. Querying custom metadata records doesn't count against SOQL limits.

New Custom Metadata Type					
Action	Label	Installed Package	Namespace Prefix	Visibility	API Name
Manage Records	DM App Config		pclm	Public	pclm__DM_App_Config__mdt
Manage Records	Recommendation Lite Object		pclm	Public	pclm__Recommendation_Lite_Object__mdt
Manage Records	Seed Data Pattern		pclm	Public	pclm__Seed_Data_Pattern__mdt
Manage Records	Seed Data Recommendation Rule		pclm	Public	pclm__Seed_Data_Recommendation_Rules__mdt

Click on the 'Edit' link



SETUP

Custom Metadata Types

DM App Configs

View: DM All | Edit | Create New View

Action	Label	DM App Config Name	Module Name	Value	New
Edit	Capture Exceptions	Capture_Exceptions	Application	FALSE	
Edit	Data Masker License Activation	Data_Masker_License_Activation	Application	https://plumcloudcommunity.force.com/services/apexrest/v1/LicenseManager	
Edit	DeleteOperationType	DeleteOperationType	Application	hardDelete	
Edit	Email Invalid String	Email_Invalid_String	Application	.invalid	
Edit	Hide Attachment	Hide_Attachment	ObjectMaskingUnselectable	Attachment	
Edit	Hide CaseComment	Hide_CaseComment	ObjectMaskingUnselectable	CaseComment	
Edit	Hide ContentDocument	Hide_ContentDocument	ObjectMaskingUnselectable	ContentDocument	
Edit	Hide EmailMessage	Hide_EmailMessage	ObjectMaskingUnselectable	EmailMessage	
Edit	Hide Event	Hide_Event	ObjectMaskingUnselectable	Event	
Edit	Hide FeedItem	Hide_FeedItem	ObjectMaskingUnselectable	FeedItem	
Edit	Hide Note	Hide_Note	ObjectMaskingUnselectable	Note	
Edit	Hide Task	Hide_Task	ObjectMaskingUnselectable	Task	

Update the value to "True"



SETUP

Custom Metadata Types

DM App Config (Managed)

This DM App Config is managed, meaning that you may only edit certain attributes. [Display More Information](#)

DM App Config Edit Save Save & New Cancel

Information

Label Namespace Prefix

DM App Config Name i

Module Name

Value

Save Save & New Cancel

The value of 'Label Capture_Exceptions' is now successfully set to "True". This means DataMasker will now capture metadata exceptions.



SETUP

Custom Metadata Types

DM App Configs

View: DM All Edit Create New View

Action	Label ↑	DM App Config Name	Module Name	Value
Edit i	Capture_Exceptions	Capture_Exceptions	Application	TRUE
Edit i	Data Masker License Activation	Data_Masker_License_Activation	Application	https://plumcloudcommunity.force.com/services/apexrest/v1/LicenseManager
Edit i	DeleteOperationType	DeleteOperationType	Application	hardDelete
Edit i	Email_Invalid_String	Email_Invalid_String	Application	.invalid
Edit i	Hide Attachment	Hide_Attachment	ObjectMaskingUnselectable	Attachment
Edit i	Hide CaseComment	Hide_CaseComment	ObjectMaskingUnselectable	CaseComment
Edit i	Hide ContentDocument	Hide_ContentDocument	ObjectMaskingUnselectable	ContentDocument

Troubleshooting Internal Server Error Issues

“Getting error InternalServerError : Connection pool is shutting down: ConnectionPool2:InvalidJobState : Job has been set to terminal state”

This is standard salesforce exception – 'InvalidJobState' which mean the job state specified in a job update operation is invalid. Hence it is set to terminal state.

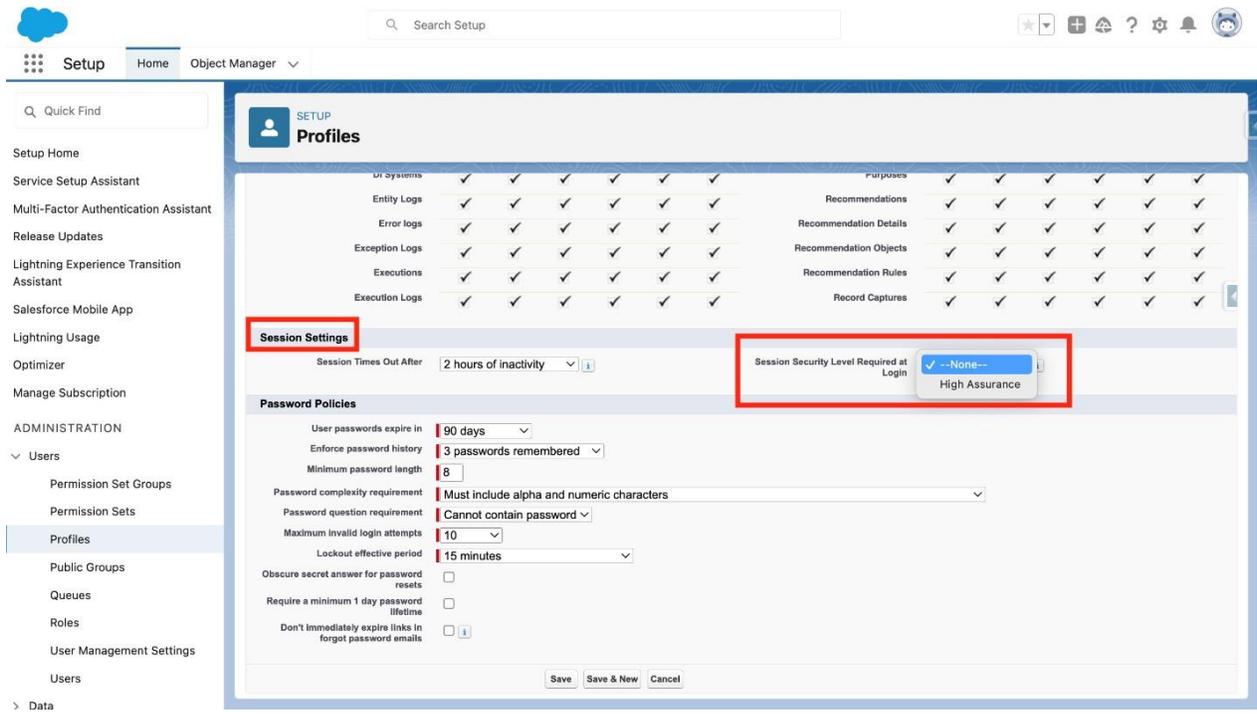
It has nothing to do with DataMasker Application.

User can ignore these types of error because it will be fixed in the Retry Operation of DataMasker.

Resolution: To get more details about such type of exceptions, user can raise a case with Salesforce.

Troubleshooting: How to fix the missing execution record issue while running DataMasker

Every time the 'Run Masking' button is clicked, DataMasker creates an Execution record. If the record is not getting created, it might be an issue with the session settings. This issue can be due to the default organizational security settings that is set to 'High Assurance' value in the 'Session Security Level Required at Login' field. Hence, the execution record is not being created when running DataMasker. To resolve this issue, follow the steps below:



Step 1: Change the value of the 'Session Security Level Required at Login' field in System Admin Profile from 'High Assurance' to 'None' and save the settings.

Step 2: Navigate back to the configuration and click on the 'Run Masking' button. An execution record will now be created.

It is important to note that changing the 'Session Security Level Required at Login' field value to 'None' can have implications for session security settings. Therefore, it is recommended to change the value back to its original setting after completing the DataMasker execution or consulting with the Security Team.

Following these steps should resolve the missing execution record issue when running DataMasker. However, if the issue persists or if you have any further questions, please contact our support team for further assistance.

What's New in Data Masking

Release Notes 1.28.5 (May-2023)

Release Date

- 10-May-2023

AppExchange Link

[Download Free DataMasker here](#)

Enhancements

- **Optimized Import mapping JSON:** Import mapping JSON file is now optimized and of smaller size
- **Optimized Feed Tracking Deactivation:** Optimization to how feed tracking is turned off and on for Standard, Custom, and Managed Package fields during and after data masking
- **History Tracking Automation:** Optimization to how history tracking is turned off and on for Standard, Custom, and Managed Package fields during and after data masking

Bug Fixes

- **Pattern Duplicate ID error:** Import configuration displays error for a pattern used across multiple fields in the source mapping layout. This bug is now fixed.

Known Issues

- **Formula Field action type:** DataMasker doesn't support masking of DateTime field using Formula field action.

Release Notes 1.28.4 (Jan-2023)

Release Date

- 29-Jan-2023

AppExchange Link

[Download Free DataMasker here](#)

Enhancements

- **Optimized Import mapping JSON:** Import mapping JSON file is now optimized and of smaller size
- **Optimized Feed Tracking Deactivation:** Optimization to how feed tracking is turned off and on for Standard, Custom, and Managed Package fields during and after data masking
- **History Tracking Automation:** Optimization to how history tracking is turned off and on for Standard, Custom, and Managed Package fields during and after data masking

Bug Fixes

- **Pattern Duplicate ID error:** Import configuration displays error for a pattern used across multiple fields in the source mapping layout. This bug is now fixed.

Known Issues

Release Note 1.27.1 (Sep-2022)

Release Date

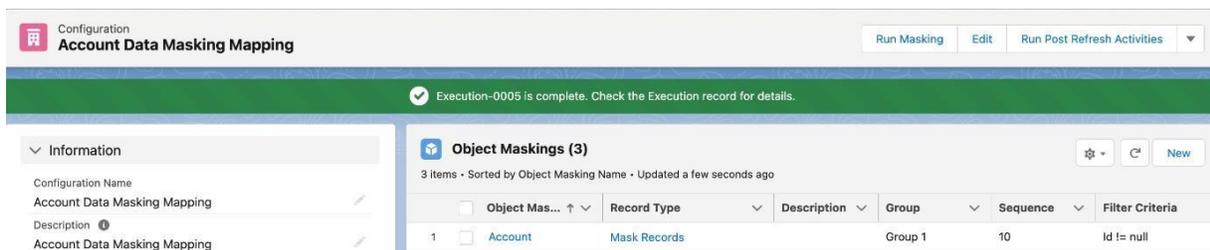
- 28-Sep-2022

AppExchange Link

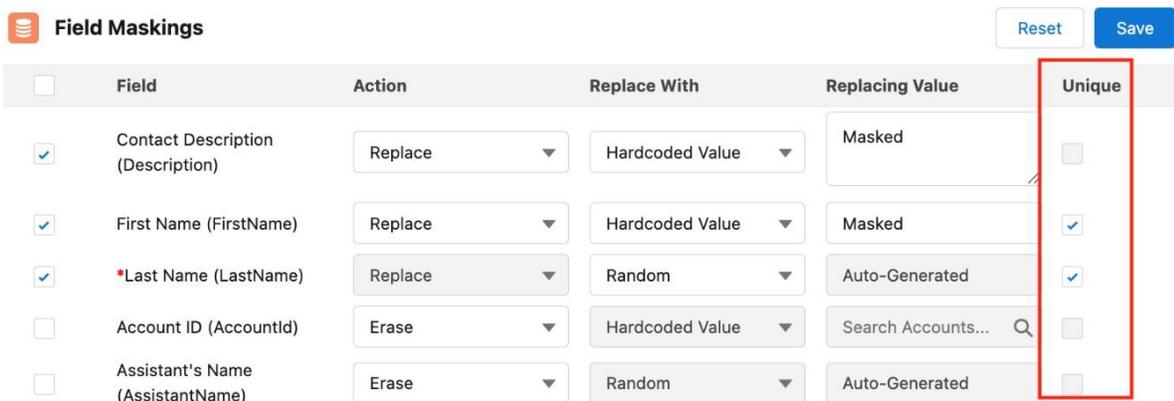
[Download Free DataMasker here](#)

New Functionality

- **Dynamic Progress Banners:** DataMasker now supports lightning banners throughout the masking life cycle. These banners will indicate to the user about missing steps required to complete the configuration, masking progress, and status of execution at every stage.



- **Mask Data with Unique Value:** Replace sensitive information stored under Text and Text Area fields for any object by checking Unique field in the field masking layout. Unique checkbox offers a fresh approach to masking your data over frequently used masking actions.



- **Label Replacement:** Delete Settings Label name is now replaced by 'Org-Wide Delete Settings'

Enhancements

- **Data Masking Action button:** Previous button (DataMasking) has now been deprecated from the configuration page layout. Initiate DataMasking execution using the new LWC component

'Run Masking' action button that supports modern UX design and faster loading of the execution cycle.

- **Mask Data using Formula Field:** DataMasker allows the user to mask their sandbox data using the power of the formula field. Simply add the Formula field action from Object Manager under the field masking layout to mask data using multiple reference field values.
- **Prevent Multiple Masking Executions:** DataMasker will alert the user and display the details about the existing execution if any user attempts to initiate multiple executions at any given point in time.

Bug Fixes

- **Execution Status Bar:** Fixed bar length alignment issues that display Green, Red, and Yellow status bar based tally of total records masked, In-progress and errored. This fix will ensure accurate status for objects with zero records, errored records, etc under Execution and Execution Logs records.

Known Issues

- **Formula Field action type:** DataMasker doesn't support masking of DateTime field using Formula field action.

Release Note 1.26 (Jul-2022)

Release Date

- 05-Jul-2022

AppExchange Link

[Download Free DataMasker here](#)

New Functionality

- **Export/Import Masking Configuration:** DataMasker supports the migration of masking configurations from source org to destination org and vice versa. DataMasker allows users to export or import specific configurations based on their requirements. In addition, DataMasker detects the existing configurations and supports ‘Upsert’ of updated mappings.

Enhancements

- **Bulk Queries using DataMasker API:** Perform SOQL on bulk queries through exposed DataMasker API. This API fetches the count of large data sets without entering a timeout session.
- **Enhanced visibility of Masking Record count:** DataMasker now refreshes the masking count every 15 minutes. Users can now view the exact count of records processed or errored under execution logs.

The screenshot shows a table titled "Execution Logs (10+)" with 10 rows of data. Each row represents a masking job for a specific object type. The columns include: Execution Log (with a checkbox), Execution L... (with a progress bar), Status (all "Masked"), Object Masking (the object name), Records Total, Records (Pr..., Records (...), Apex Job Id Link, and Exception ... (with a dropdown arrow).

<input type="checkbox"/> Execution Log ...	Execution L...	Status	Object Masking	Records Total	Records (Pr...	Records (...	Apex Job Id Link	Exception ...
<input type="checkbox"/> Contact	<div style="width: 100%; height: 10px; background-color: red;"></div>	Masked	Contact	1,000,000	142,815	857,185	/7075i00001DXLczAAH	
<input type="checkbox"/> Lead	<div style="width: 100%; height: 10px; background-color: green;"></div>	Masked	Lead	990,000	990,000	0	/7075i00001DXLd1AAH	
<input type="checkbox"/> Account	<div style="width: 100%; height: 10px; background-color: green;"></div>	Masked	Account	990,000	990,000	0	/7075i00001DXMIBAAX	
<input type="checkbox"/> Contact	<div style="width: 100%; height: 10px; background-color: green;"></div>	Masked	Contact	1,000,000	1,000,000	0	/7075i00001DXMIDAAX	
<input type="checkbox"/> Lead	<div style="width: 100%; height: 10px; background-color: green;"></div>	Masked	Lead	990,000	990,000	0	/7075i00001DXMIFAAX	
<input type="checkbox"/> Employee	<div style="width: 100%; height: 10px; background-color: green;"></div>	Masked	Employee	990,000	990,000	0	/7075i00001DXMIMAAX	
<input type="checkbox"/> Employee	<div style="width: 100%; height: 10px; background-color: green;"></div>	Masked	Employee	990,000	990,000	0	/7075i00001DXMINAAX	
<input type="checkbox"/> Attachment	<div style="width: 100%; height: 10px; background-color: green;"></div>	Masked	Attachment	0	0	0	/7075i00001DXMIOAAX	
<input type="checkbox"/> ContentDocument	<div style="width: 100%; height: 10px; background-color: green;"></div>	Masked	ContentDocument	1	1	0	/7075i00001DXMIPAAX	
<input type="checkbox"/> FeedItem	<div style="width: 100%; height: 10px; background-color: green;"></div>	Masked	FeedItem	9	9	0	/7075i00001DXMpAAH	

- **Managed Package Validation Rule:** Validation Rules of Managed Packages can now be deactivated during DataMasking execution and supports reactivation after completion of the entire execution.

Bug Fixes

- **Field Mapping Component:** The field masking page encountered a loading issue due to 200+ fields associated with the Case object. This is now fixed and the field masking layout for any object can accommodate the loading of 350+ fields instantly.
- **Disjointed Bar Chart:** DataMasker showed inaccurate alignment of the masking status field based on the count of processed or errored records. This is fixed now.
- **OwnerID Field Type:** OwnerID 'Lookup' field is now replaced with the 'Text' field on the field masking layout. A high volume of user metadata led to a field loading issue. This has been resolved now.
- **Removal of Compliance Categorization Values:** DataMasker wiped out the Compliance Categorization value assigned to a particular field during masking execution. This has been fixed now.

Known Issues

- **Managed Package Object History:** DataMasker does not disable the Object 'Set Field History' of managed packages after initiating the DataMasking operation.

Release Note 1.24 (May-2022)

Release Date

- 10-May-2022

AppExchange Link

[Download Free DataMasker here](#)

New Functionality

- **Inline Edit Field Masking:** The 'Field Masking' user interface(Lightning Web Component) component has been re-written to allow inline editing. This allows adding and removing multiple fields all in one go. This saves dozens of clicks and page reload and refreshes and improves user efficiency.

Enhancements

- **Optimized Configuration Page layout:** The configuration page layout has been optimized for better visibility. It uses a Header and Left Sidebar page style that helps to show the configuration details and the related records without the need for scrolling.
- **History Objects** - Users can now add [Object] History to the object masking. This enables removing history records for all history-tracked objects. Example: Account History, Contact History
- **New Field 'Description' on Object Masking** - This allows users to add comments on each of the Object Masking records.

Bug Fixes

- None

Known Issues

- None

Release Note 1.23 (Feb-2022)

Release Date

- 17-Feb-2022

AppExchange Link

[Download Free DataMasker here](#)

New Functionality

- **Clone with Related:** Many customers with large data volumes have a need to add the same object and all the fields multiple times(with different filter criteria). This was very time-consuming and frustrating. The 'Clone with Related' button is released to make it easy for admins to clone the Object Masking record along with all the Field Masking records.

Enhancements

- **License Count Changes:** DataMasker Lifetime Free license allows up to 4 Objects to be masked. Many customers with large data volumes have a need to add the same object multiple times(with different filter criteria). This allows DataMasker to mask a subset of records for the same object in parallel. This works great but was counting against the 4 object limit. With this release, DataMasker has changed the way Object count is calculated. Now the count of objects is unique by Object name.
- **Object Masking - User Interface:** LWC page has been enhanced for better usability
- **Field Masking - User Interface:** LWC page has been enhanced for better usability
- **DataMasker Flow:** Instructions on the 'DataMasker' flow component have been simplified

Bug Fixes

- **Field Masking Action:** In the earlier versions of DataMasker, changing the Further Action from 'Hardcode' to 'Regex' or 'Custom List' was buggy and was causing the masking to fail. This has been resolved.
- **Masking Status:** In the earlier releases, there was a bug that could cause the masking counts - Records Total, Records(Processed), Records(Errored)- to be inaccurate on the Execution Log record. This has been resolved.

Known Issues

- None

Release Note 1.22 (Dec-2021)

[Release Date](#)

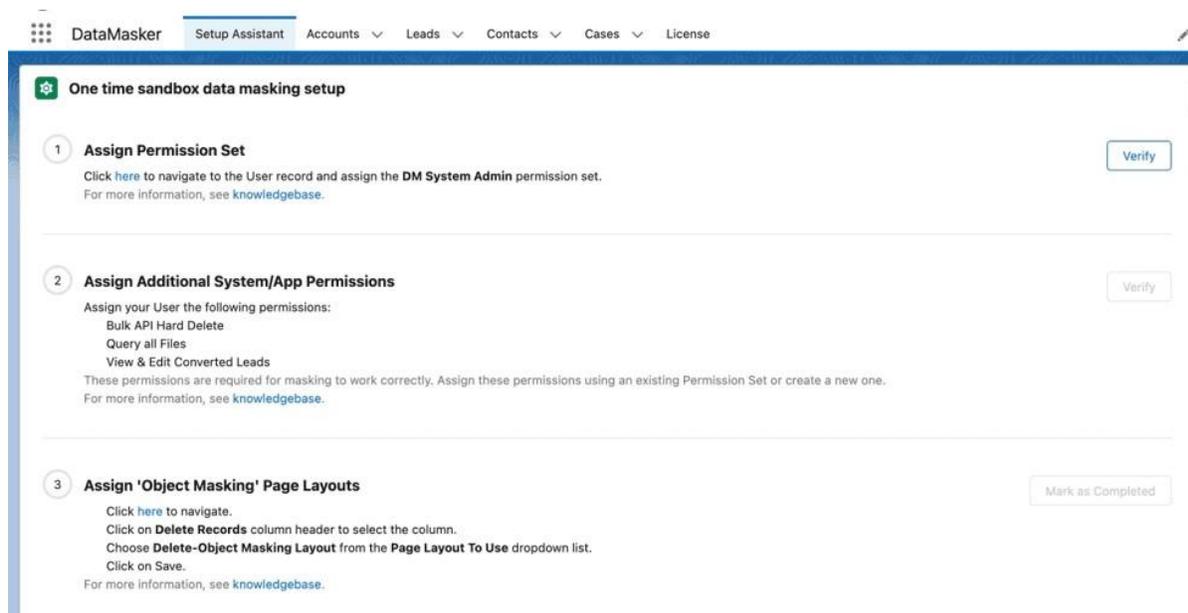
- 27-Dec-2021

[AppExchange Link](#)

[Download Free DataMasker here](#)

[New Functionality](#)

- New Tab "Setup Assistant" is introduced which makes the DataMasker configuration process easy for users.



[Enhancements](#)

- Data Masker Free version now allows 4 Objects with unlimited records for a lifetime.
- Data Masker to validate multiple settings and permissions checks to enhance exception handling.
- Users can now enrich the masking of PII data through newly created lists available in the Pattern object.

[Bug Fixes](#)

- Non-editable fields (Audit fields, Formula fields, Compound fields) are removed from the field masking dropdown.

Release Note 1.21 (Sep-2021)

Release Date

- 12-Sep-2021

AppExchange Link

<https://appexchange.salesforce.com/appxListingDetail?listingId=a0N3u000000O2JKEA1>

New Functionality

- **Retry Count:** Automatically retries to mask failed records. Often in LDV, record locking prevents some records from masking, and all the failed records are retried by DataMasker.
- **Post Refresh Activity:** Admins spend hours updating metadata on refreshed Sandboxes. DataMasker has now the functionality to automatically update Custom Label and Remote Site Settings at a click of a button.

Data Masking **Post Refresh Activities** Executions

Post Refresh Activities (2) 2 items • Updated 3 minutes ago

<input type="checkbox"/>	Post Refresh Name	Record Type	Active	Sequence	Description
<input type="checkbox"/>	Remote Site Setting	Remote Site Setting	<input checked="" type="checkbox"/>	1	Remote Site Setting edit
<input type="checkbox"/>	Custom Label	Custom Label	<input checked="" type="checkbox"/>	2	Custom Label edit

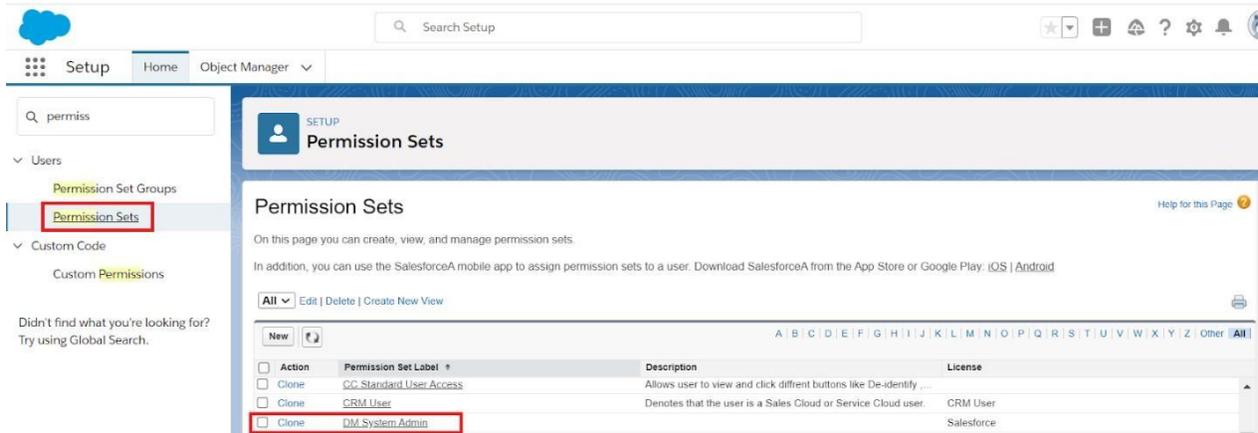
Enhancements

- Improved exception handling and reporting
- Data Masker free now allows 2 Objects with unlimited records for a Lifetime
- License for paid DataMasker customers can now be enabled via an Encrypted License Key

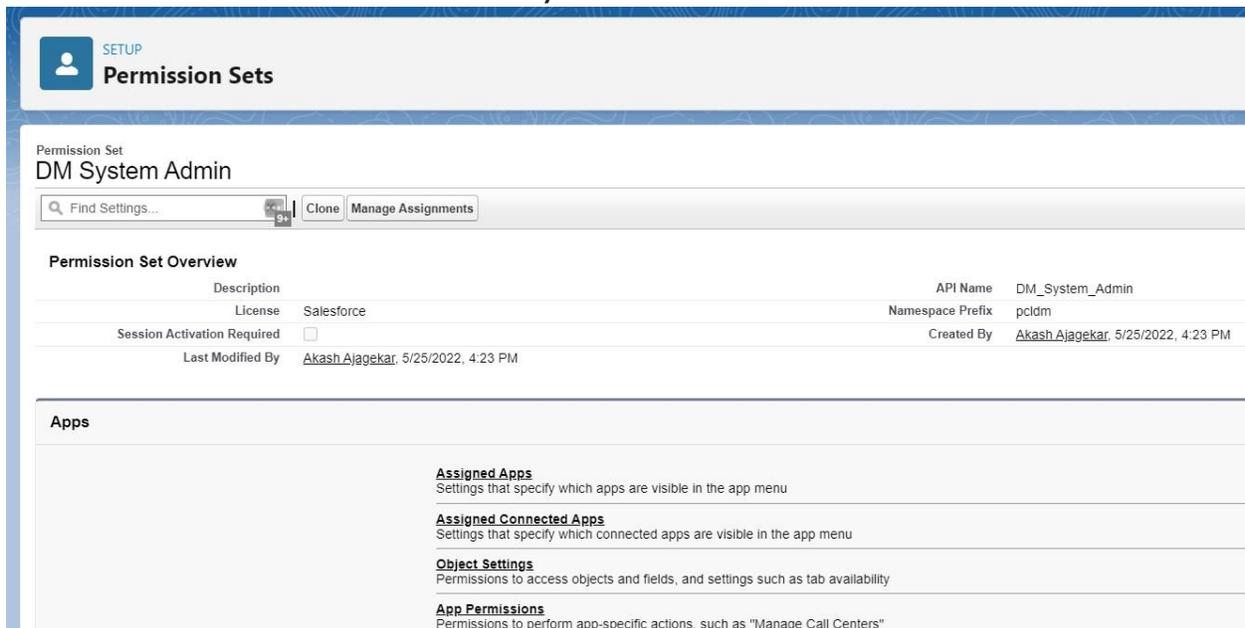
Step 3: Assign Permission Sets To Your Profile

Data Masker includes a single Permission Set "DM System Admin" that can be assigned to the appropriate user, thus allowing them to configure the product.

Step 1: Go to "Setup", and enter "Permission Sets" in the Quick Find box. Click on Permission Sets as shown below screenshot.



Click on the Permission set 'DM System Admin'



Click on the Manage Assignment button to assign this permission set to the appropriate user

SETUP **Permission Sets**

Permission Set
DM System Admin

Find Settings... Clone **Manage Assignments**

Permission Set Overview

Description		API Name	DM_System_Admin
License	Salesforce	Namespace Prefix	pcdm
Session Activation Required	<input type="checkbox"/>	Created By	Akash Ajagekar, 5/25/2022, 4:23 PM
Last Modified By	Akash Ajagekar, 5/25/2022, 4:23 PM		

Apps

- Assigned Apps**
Settings that specify which apps are visible in the app menu
- Assigned Connected Apps**
Settings that specify which connected apps are visible in the app menu
- Object Settings**
Permissions to access objects and fields, and settings such as tab availability
- App Permissions**
Permissions to perform app-specific actions, such as "Manage Call Centers"
- Apex Class Access**
Permissions to execute Apex classes

Click on the Add Assignments button

SETUP **Permission Sets**

Assigned Users
DM System Admin
« Back to: Permission Set

A | B | C | D | E | F | C

Add Assignments Remove Assignments

Full Name ↑	Alias	Username	Role	Active
No records to display.				

Add Assignments Remove Assignments

A | B | C | D | E | F | C

Select the user from the user list.

[Note: Permission set can be assigned to multiple users so we can add more than one user by selecting the checkboxes.]

Click on the "Assign" button.

SETUP **Permission Sets**

Assign Users
All Users

View: All Users | Edit | Create New View

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X

<input type="checkbox"/>	Action	Full Name	Alias	Username	Role	Active	Profile
<input checked="" type="checkbox"/>	Edit	Ajagekar, Akash	AAja9	dmp1.5@beta22.com		✓	System Administrator
<input type="checkbox"/>	Edit	Chatter Expert	Chatter	chatty_00d5g0000a3oeweaf.vis0pg4cixb@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/>	Edit	User, Integration	integ	integration@00d5g0000a3oeweaf.com		✓	Analytics Cloud Integration User
<input type="checkbox"/>	Edit	User, Security	sec	insightssecurity@00d5g0000a3oeweaf.com		✓	Analytics Cloud Security User
<input type="checkbox"/>	Edit	W. Abhishek	aw	dmp1.5@beta25.com	CEO	✓	System Administrator

Assign Cancel

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X

Click on the Done button

SETUP **Permission Sets**

Assignment Summary
DM System Admin

✓ Permission set DM System Admin has been assigned to 1 user.

Done

Full Name	Username	User License	Message
Akash Ajagekar	dmp1.5@beta22.com	Salesforce	Success

Done

Here 'DM System Admin' permission set has been assigned to the user successfully.

Step 2: There are three more permissions that need to be assigned to the user. The permissions are,

1. Bulk API Hard Delete
2. Query all Files
3. View & Edit Converted Leads

So, there are three options by which user can assign these permissions. User can choose either any one of the below,

Option 1: Add permissions to the existing permission set.

Option 2: Add permissions to the user's profile.

Option 3: Create a new custom permission set and assign these permissions.

User can follow the below steps to add these three permissions,

Option 1: Add permissions to the existing permission set.

Step 1: Goto Permission Set and click on the link "App Permissions".

Permission Set
Permission Set

Find Settings... Clone Delete Edit Properties Manage Assignments

Permission Set Overview

Description	API Name	Permission_Set
License	Namespace Prefix	
Session Activation Required <input type="checkbox"/>	Created By	Akash Ajagekar, 5/26/2022, 2:27 PM
Last Modified By	Akash Ajagekar, 5/26/2022, 2:27 PM	

Apps

- Assigned Apps**
Settings that specify which apps are visible in the app menu
- Assigned Connected Apps**
Settings that specify which connected apps are visible in the app menu
- Object Settings**
Permissions to access objects and fields, and settings such as tab availability
- App Permissions**
Permissions to perform app-specific actions, such as "Manage Call Centers"
- Apex Class Access**
Permissions to execute Apex classes
- Visualforce Page Access**
Permissions to execute Visualforce pages
- External Data Source Access**
Permissions to authenticate against external data sources

Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform
[Learn More](#)

Step 2: Click on the Edit button to make changes.

Permission Set
Permission Set

Find Settings... Clone Delete Edit Properties Manage Assignments

[Permission Set Overview](#) > **App Permissions**

App Permissions Edit

▼ Call Center

Permission Name	Enabled	Description
Access Conversation Entries	<input type="checkbox"/>	Grants users access to Conversation Entries
Agent Initiated Outbound Messaging	<input type="checkbox"/>	Initiate messaging with customers.
Configure Messaging	<input type="checkbox"/> i	Configure Messaging settings.
Edit Case Comments	<input type="checkbox"/> i	Edit their own case comments but not other user's comments.
End Messaging Session	<input type="checkbox"/>	End in-progress Messaging sessions with end users.
Import Solutions	<input type="checkbox"/> i	Import solutions for the organization.
Manage Business Hours Holidays	<input type="checkbox"/> i	Create, edit, and delete business holidays.
Manage Call Centers	<input type="checkbox"/> i	Create, import, edit, and delete a call center configuration.
Manage Cases	<input type="checkbox"/> i	Administer case settings, including Email-to-Case and mass transfer of cases.

Step 3: Find "Query All Files" and enable the checkbox next to "Query All Files".



SETUP

Permission Sets

Transfer Cases	<input type="checkbox"/>	Change a case's owner.
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▼ Content

Permission Name	Enabled	Description
Manage Content Permissions	<input type="checkbox"/>	Create, edit, and delete library permissions in Salesforce CRM Content.
Manage Content Properties	<input type="checkbox"/>	Create, edit, and delete custom fields in Salesforce CRM Content.
Manage record types and layouts for Files	<input type="checkbox"/>	Create, edit, and delete content types in Salesforce CRM Content.
Manage Salesforce CRM Content	<input type="checkbox"/>	Create, edit, and delete libraries and library memberships.
Query All Files	<input checked="" type="checkbox"/>	Allows View All Data users to SOQL query all files in the org.

Step 4 : On the same page find “View and Edit Converted Leads” and enable the checkbox next to “View and Edit Converted Leads”.



SETUP

Permission Sets

▼ Partner Relationship Management

Permission Name	Enabled	Description
IP Restrict Requests	<input type="checkbox"/>	Restrict what IP addresses can access in the PRM Portal.

▼ Sales

Permission Name	Enabled	Description
Access to view Data Assessment	<input type="checkbox"/>	Access to view Data Assessment. Data Assessment provides a summary of account data.
Activate Contracts	<input type="checkbox"/>	Change contract status to Activated.
Activate Orders	<input type="checkbox"/>	Change order status to Activated.
Convert Leads	<input type="checkbox"/>	Convert leads into accounts, contacts, and opportunities.
Delete Activated Contracts	<input type="checkbox"/>	Delete contracts, regardless of their status.
Edit Activated Orders	<input type="checkbox"/>	Edit an order record once it is activated.
Edit Opportunity Product Sales Price	<input type="checkbox"/>	Change the sales price on opportunity line items.
Import Leads	<input type="checkbox"/>	Import leads and update campaign history.
Import Personal Contacts	<input type="checkbox"/>	Import personal accounts and contacts.
Manage Leads	<input type="checkbox"/>	Change the status of multiple leads in a list view.
Send Stay-in-Touch Requests	<input type="checkbox"/>	Send Stay-in-Touch update emails.
Transfer Leads	<input type="checkbox"/>	Change a lead's owner.
Use Team Reassignment Wizards	<input type="checkbox"/>	Mass reassign account team and opportunity team members.
View and Edit Converted Leads	<input checked="" type="checkbox"/>	View and edit converted lead records.

Click on the "Save" button.

SETUP
Permission Sets

Permission Set
DM System Admin Clone

Find Settings... | Clone Edit Properties Manage Assignments

Permission Set Overview > App Permissions

App Permissions Save Cancel

▼ Call Center

Permission Name	Enabled	Description
Access Conversation Entries	<input type="checkbox"/>	Grants users access to Conversation Entries
Edit Case Comments	<input type="checkbox"/> i	Edit their own case comments but not other user's comments.
Import Solutions	<input type="checkbox"/> i	Import solutions for the organization.
Manage Business Hours Holidays	<input type="checkbox"/> i	Create, edit, and delete business holidays.
Manage Call Centers	<input type="checkbox"/> i	Create, import, edit, and delete a call center configuration.
Manage Cases	<input type="checkbox"/> i	Administer case settings, including Email-to-Case and mass transfer o
Manage Categories	<input type="checkbox"/> i	Define and modify solution categories settings.

Step 5: Scroll down to System Permissions and click on the link to enable "Bulk API Hard Delete".

SETUP
Permission Sets

Define access to data categories

Custom Permissions
Permissions to access custom processes and apps

Custom Metadata Types
Permissions to access custom metadata types

Custom Setting Definitions
Permissions to access custom settings

System

Settings that apply across all apps, such as record and user management
[Learn More](#)

System Permissions
Permissions to perform actions that apply across apps, such as "Modify All Data"

Service Providers
Permissions that let users switch to other websites using single sign-on.

Step 6: Click on the Edit button to make changes.

Permission Set
Permission Set

Find Settings... Clone Delete Edit Properties Manage Assignments

Permission Set Overview > **System Permissions**

System Permissions Edit

▼ System

Permission Name	Enabled	Description
Access Activities	<input type="checkbox"/>	Access tasks, events, calendar, and email.
Access Customer Asset Lifecycle Management APIs	<input type="checkbox"/>	Use APIs to manage lifecycle-managed assets.
Access Custom Mobile Apps	<input type="checkbox"/>	Allow user to run custom mobile apps.
Access drag-and-drop content builder	<input type="checkbox"/>	Create and manage email templates and content in a drag-and-drop builder.
Access Experience Management	<input type="checkbox"/>	Access pages and dashboards available in Experience Management.
Access Libraries	<input type="checkbox"/>	Access libraries.

Step 7: Find "Bulk API Hard Delete" and enable the checkbox next to "Bulk API Hard Delete".

SETUP
Permission Sets

Allow user to modify Private Connections	<input type="checkbox"/>	Allow users to modify Private Connections through the metadata, tooling, and Connect APIs.
Apex REST Services	<input type="checkbox"/>	Allow access to Apex REST services.
API Enabled	<input type="checkbox"/>	Access any Salesforce.com API.
Assign Topics	<input type="checkbox"/>	Assign existing topics to feed items. Remove topics from feed items.
Author Apex	<input type="checkbox"/>	Create Apex classes and triggers.
Bulk API Hard Delete	<input checked="" type="checkbox"/>	Delete records in the Bulk API without storing them in the Recycle Bin.
Can Approve Feed Post and Comment	<input type="checkbox"/>	Lets users control the visibility of content to other users by updating the status of a feed item or comment from pending review to published or from review.
Change Dashboard Colors	<input type="checkbox"/>	Choose dashboard color theme and palette.
Chatter Internal User	<input type="checkbox"/>	Use all Chatter features.
Close Conversation Threads	<input type="checkbox"/>	Close conversation threads in profile, group, and topic feeds in Experience Cloud sites.
Configure Custom Recommendations	<input type="checkbox"/>	Add custom recommendations in the feed, motivating users to get engaged and take action.
Connect Organization to Environment Hub	<input type="checkbox"/>	Allows a user to connect this organization to an Environment Hub.
Connect Org to Customer 360 Data Manager	<input type="checkbox"/>	Allows a user to connect the org to Customer 360 Data Manager.
Connect Org to Salesforce CDP	<input type="checkbox"/>	Allows a user to connect the org to Salesforce CDP.
Create AI Insight Objects	<input type="checkbox"/>	Create objects associated with AI record insights, including the insight, value, reason, and feedback.
Create and Customize Dashboards	<input type="checkbox"/>	Create, edit, and delete dashboards in personal folders.

Click on the "Save" button.

Permission Set
Permission Set

Find Settings... Clone Delete Edit Properties **Manage Assignments**

Permission Set Overview > System Permissions

System Permissions Save Cancel

▼ System

Permission Name	Enabled	Description
Access Activities	<input type="checkbox"/>	Access tasks, events, calendar, and email.
Access Customer Asset Lifecycle Management APIs	<input type="checkbox"/>	Use APIs to manage lifecycle-managed assets.
Access Custom Mobile Apps	<input type="checkbox"/>	Allow user to run custom mobile apps.
Access drag-and-drop content builder	<input type="checkbox"/>	Create and manage email templates and content in a drag-and-drop builder.
Access Experience Management	<input type="checkbox"/>	Access pages and dashboards available in Experience Management.
Access Libraries	<input type="checkbox"/>	Access libraries.

Step 8: Now user can assign this permission set to the appropriate user if it is not assigned already.

Click on the "Manage Assignment" button.

SETUP
Permission Sets

Permission Set
Permission Set

Find Settings... Clone Delete Edit Properties **Manage Assignments**

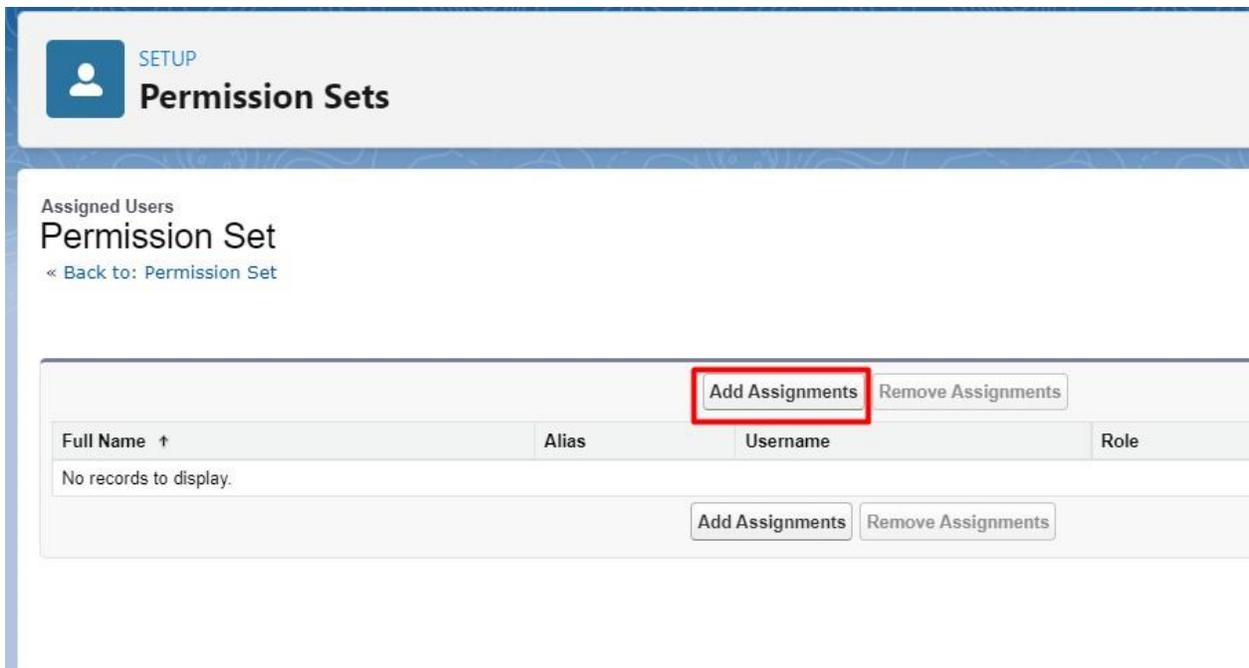
Permission Set Overview > System Permissions

System Permissions Save Cancel

▼ System

Permission Name	Enabled	Description
Access Activities	<input type="checkbox"/>	Access tasks, events, calendar, and email.
Access Customer Asset Lifecycle Management APIs	<input type="checkbox"/>	Use APIs to manage lifecycle-managed assets.
Access Custom Mobile Apps	<input type="checkbox"/>	Allow user to run custom mobile apps.
Access drag-and-drop content builder	<input type="checkbox"/>	Create and manage email templates and content in a drag-and-drop builder.
Access Experience Management	<input type="checkbox"/>	Access pages and dashboards available in Experience Management.
Access Libraries	<input type="checkbox"/>	Access libraries.

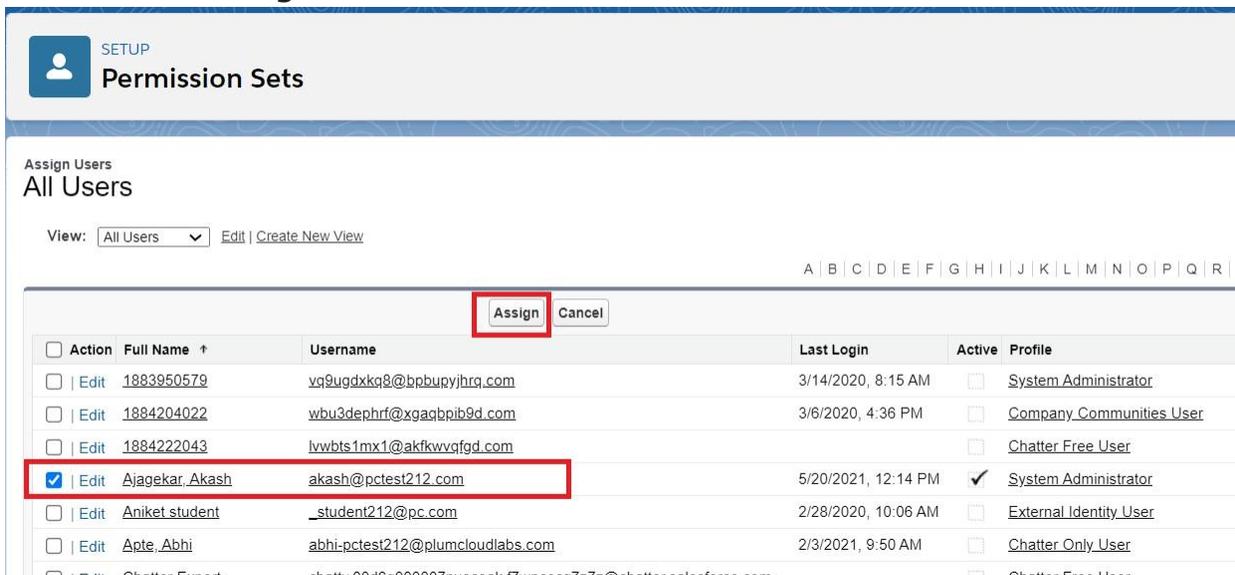
Step 9: Click on the "Add Assignment" button and the user will see a list of all users.



Step 10: Select the user from the user list.

[Note: Permission set can be assigned to multiple users so we can add more than one user by selecting the checkboxes.]

Click on the "Assign" button.



Step 11: Click on the "Done" button and now the selected user has been added to the assignment.

Assigned Users
Permission Set
 < Back to: Permission Set

Help for this

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z C

Add Assignments Remove Assignments

<input type="checkbox"/> Action	Full Name ↑	Alias	Username	Role	Active	Profile	Expires On
<input type="checkbox"/> Edit	Ajagekar, Akash	AAjag	dmp1_5@beta22.com		✓	System Administrator	

Add Assignments Remove Assignments

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z C

Option 2: Add permissions to the System Administrator cloned or System Administrator equivalent profile.

Step 1: Go to the Profile (We have taken a 'Data Masker User' profile for demo purpose here)

SETUP
Profiles

Profile
Data Masker User

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges \(0\)](#) |
 [Enabled Apex Class Access \(7\)](#) |
 [Enabled Visualforce Page Access \(1\)](#) |
 [Enabled External Data Source Access \(0\)](#) |
 [Enabled Named Credential Access \(0\)](#) |
 [Enabled Custom Metadata Type Access \(0\)](#) |
 [Enabled Custom Setting Definitions Access \(0\)](#) |
 [Enabled Flow Access \(0\)](#) |
 [Enabled Service Presence Status Access \(0\)](#) |
 [Enabled Custom Permissions \(0\)](#)

Profile Detail Edit Clone Delete View Users

Name	Data Masker User	Custom Profile	✓
User License	Salesforce		
Description			
Created By	Akash Ajagekar, 5/26/2022, 3:16 PM	Modified By	Akash Ajagekar, 5/26/2022, 3:16 PM

Page Layouts

Standard Object Layouts	
Global	Global Layout [View Assignment]
Macro	Macro Layout [View Assignment]
Email Application	Not Assigned [View Assignment]
Object Milestone	Object Milestone Layout [View Assignment]
Home Page Layout	DE Default [View Assignment]
Operating Hours	Operating Hours Layout [View Assignment]
Account	Account Layout [View Assignment]
Opportunity	Opportunity Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]
Opportunity Product	Opportunity Product Layout [View Assignment]
Asset	Asset Layout [View Assignment]
Order	Order Layout [View Assignment]

Step 2: Click on the Edit button to make changes.

SETUP Profiles

Profile
Data Masker User

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges \(0\)](#) | [Enabled Apex Class Access \(7\)](#) | [Enabled Visualforce Page Access \(1\)](#) | [Enabled External Data Source Access \(0\)](#) | [Enabled Named Credential Access \(0\)](#) | [Enabled Custom M](#)
[Enabled Custom Setting Definitions Access \(0\)](#) | [Enabled Flow Access \(0\)](#) | [Enabled Service Presence Status Access \(0\)](#) | [Enabled Custom Permissions \(0\)](#)

Profile Detail

[Edit](#) [Clone](#) [Delete](#) [View Users](#)

Name	Data Masker User		
User License	Salesforce	Custom Profile	<input checked="" type="checkbox"/>
Description			
Created By	Akash Ajagekar , 5/26/2022, 3:16 PM	Modified By	Akash Ajagekar , 5/26/2022, 3:16 PM

Page Layouts

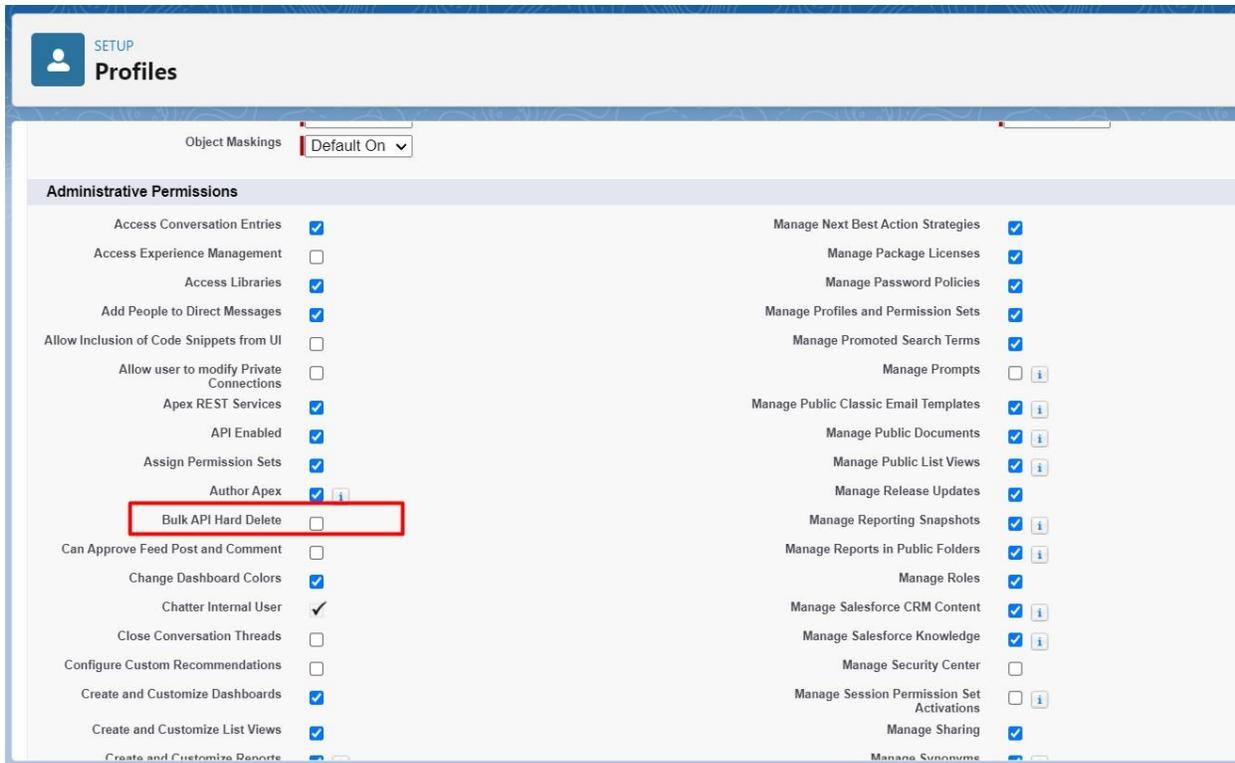
Standard Object Layouts	Global	Global Layout <small>(View Assignment)</small>	Macro	Macro Layout <small>(View Assignment)</small>
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Step 3: Scroll down to the section 'Administrative Permissions'

Administrative Permissions

Access Conversation Entries	<input checked="" type="checkbox"/>	Manage Next Best Action Strategies	<input checked="" type="checkbox"/>
Access Experience Management	<input type="checkbox"/>	Manage Package Licenses	<input checked="" type="checkbox"/>
Access Libraries	<input checked="" type="checkbox"/>	Manage Password Policies	<input checked="" type="checkbox"/>
Add People to Direct Messages	<input checked="" type="checkbox"/>	Manage Profiles and Permission Sets	<input checked="" type="checkbox"/>
Allow Inclusion of Code Snippets from UI	<input type="checkbox"/>	Manage Promoted Search Terms	<input checked="" type="checkbox"/>
Allow user to modify Private Connections	<input type="checkbox"/>	Manage Prompts	<input type="checkbox"/> i
Apex REST Services	<input checked="" type="checkbox"/>	Manage Public Classic Email Templates	<input checked="" type="checkbox"/> i
API Enabled	<input checked="" type="checkbox"/>	Manage Public Documents	<input checked="" type="checkbox"/> i
Assign Permission Sets	<input checked="" type="checkbox"/>	Manage Public List Views	<input checked="" type="checkbox"/> i
Author Apex	<input checked="" type="checkbox"/> i	Manage Release Updates	<input checked="" type="checkbox"/>
Bulk API Hard Delete	<input type="checkbox"/>	Manage Reporting Snapshots	<input checked="" type="checkbox"/> i
Can Approve Feed Post and Comment	<input type="checkbox"/>	Manage Reports in Public Folders	<input checked="" type="checkbox"/> i
Change Dashboard Colors	<input checked="" type="checkbox"/>	Manage Roles	<input checked="" type="checkbox"/>
Chatter Internal User	<input checked="" type="checkbox"/>	Manage Salesforce CRM Content	<input checked="" type="checkbox"/> i
Close Conversation Threads	<input type="checkbox"/>	Manage Salesforce Knowledge	<input checked="" type="checkbox"/> i
Configure Custom Recommendations	<input type="checkbox"/>	Manage Security Center	<input type="checkbox"/>
Create and Customize Dashboards	<input checked="" type="checkbox"/>	Manage Session Permission Set Activations	<input type="checkbox"/> i
Create and Customize List Views	<input checked="" type="checkbox"/>	Manage Sharing	<input checked="" type="checkbox"/>

Step 4: User will find 'Bulk Api Hard Delete' permission, Enable the checkbox next to it



Step 5: In the same section, user will find 'Query All Files' permission, enable the checkbox next to it



Step 6: Again in the current section that is 'Administrative Permissions' user will find 'View and Edit Converted Leads' permission. Enable the checkbox next to it

Manage Dynamic Dashboards	<input checked="" type="checkbox"/>	View All Data	<input checked="" type="checkbox"/>
Manage Email Client Configurations	<input checked="" type="checkbox"/>	View All Lookup Record Names	<input type="checkbox"/>
Manage Encryption Keys	<input type="checkbox"/>	View All Profiles	<input checked="" type="checkbox"/>
Manage Entitlements	<input checked="" type="checkbox"/>	View All Users	<input checked="" type="checkbox"/>
Manage Experiences	<input type="checkbox"/>	View and Edit Converted Leads	<input type="checkbox"/>
Manage Health Check	<input checked="" type="checkbox"/>	View Dashboards in Public Folders	<input checked="" type="checkbox"/>
Manage Internal Users	<input checked="" type="checkbox"/>	View Data Categories in Setup	<input checked="" type="checkbox"/>
Manage IP Addresses	<input checked="" type="checkbox"/>	View Flow Usage and Flow Event Data	<input checked="" type="checkbox"/>
Manage Knowledge Article Import/Export	<input checked="" type="checkbox"/>	View Health Check	<input checked="" type="checkbox"/>
Manage Learning	<input type="checkbox"/>	View Help Link	<input checked="" type="checkbox"/>
Manage Learning Reporting	<input type="checkbox"/>	View Reports in Public Folders	<input checked="" type="checkbox"/>
Manage Letterheads	<input checked="" type="checkbox"/>	View Restriction and Scoping Rules	<input type="checkbox"/>
Manage Lightning Sync	<input checked="" type="checkbox"/>	View Roles and Role Hierarchy	<input checked="" type="checkbox"/>
Manage Login Access Policies	<input checked="" type="checkbox"/>	View Security Center pages	<input type="checkbox"/>
Manage Macros Users Can't Undo	<input checked="" type="checkbox"/>	View Setup and Configuration	<input checked="" type="checkbox"/>

Step 7: Now click on the Save button

Profile Edit
Data Masker User

Set the permissions and page layouts for this profile.

Profile Edit

Name:

User License: Salesforce

Description:

Custom Profile:

Custom App Settings

	Visible	Default		Visible	Default
All Tabs (standard__AllTabSet)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Sales (standard__LightningSales)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Sales (standard__Sales)	<input type="checkbox"/>	<input checked="" type="radio"/>
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Sales Console (standard__LightningSalesConsole)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Bolt Solutions (standard__LightningBolt)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Salesforce Chatter (standard__Chatter)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Community (standard__Community)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Salesforce Scheduler Setup (standard__LightningScheduler)	<input checked="" type="checkbox"/>	<input type="checkbox"/>

So we have given all three permissions here in the profile. Now user can assign this profile if not assigned already.

Option 3: Create a new custom permission set and assign these permissions.

Step 1: Goto Permission Set and click on the New button

Permission Sets

On this page you can create, view, and manage permission sets.

In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#) | [Android](#)

All Permission Sets

	Action	Permission Set Label ↑	Description
<input type="checkbox"/>	Clone	Buyer	Allows access to the store. Lets users see products and categories, ...
<input type="checkbox"/>	Clone	Buyer Manager	Includes all Buyer capabilities, and allows access to manage carts an...
<input type="checkbox"/>	Clone	CRM User	Denotes that the user is a Sales Cloud or Service Cloud user.
<input type="checkbox"/>	Clone	Commerce Admin	Allow access to commerce admin features.

Step 2: Enter Name for the Permission Set

Permission Set
Create

Save Cancel

Enter permission set information

Label Custom Permission Set

API Name Custom_Permission_Set

Description

Session Activation Required

Select the type of users who will use this permission set

Who will use this permission set?

- Choose '--None--' if you plan to assign this permission set to multiple users with different user and permission set licenses.
- Choose a specific user license if you want users with only one license type to use this permission set.
- Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.

Step 3: Click on the Save button

After Clicking on the Save button the newly created permission set will open

SETUP
Permission Sets

Permission Set
Custom Permission Set

Find Settings... Clone Delete Edit Properties Manage Assignments

Permission Set Overview

Description	API Name	Custom_Permission_Set
License	Namespace Prefix	
Session Activation Required <input type="checkbox"/>	Created By	Akash Ajagekar: 5/26/2022, 2:45 PM
Last Modified By	Akash Ajagekar: 5/26/2022, 2:45 PM	

Apps

- Assigned Apps**
Settings that specify which apps are visible in the app menu
- Assigned Connected Apps**
Settings that specify which connected apps are visible in the app menu
- Object Settings**
Permissions to access objects and fields, and settings such as tab availability
- App Permissions**
Permissions to perform app-specific actions, such as "Manage Call Centers"
- Apex Class Access**
Permissions to execute Apex classes
- Visualforce Page Access**
Permissions to execute Visualforce pages
- External Data Source Access**
Permissions to authenticate against external data sources

Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform
[Learn More](#)

Step 4: Now to assign these permissions, user can click on the link "App Permissions"

Permission Set
Custom Permission Set Video 1

Find Settings... | Clone Delete Edit Properties Manage Assignments

Permission Set Overview

Description	API Name	Custom_Permission_Set
License	Namespace Prefix	
Session Activation Required <input type="checkbox"/>	Created By	Akash Ajagekar, 5/26/2022, 2:45 PM
Last Modified By	Akash Ajagekar, 5/26/2022, 2:45 PM	

Apps

- Assigned Apps**
Settings that specify which apps are visible in the app menu
- Assigned Connected Apps**
Settings that specify which connected apps are visible in the app menu
- Object Settings**
Permissions to access objects and fields, and settings such as tab availability
- App Permissions**
Permissions to perform app-specific actions, such as "Manage Call Centers"
- Apex Class Access**
Permissions to execute Apex classes
- Visualforce Page Access**
Permissions to execute Visualforce pages

Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform

Step 5: Click on the Edit button to make changes.

SETUP **Permission Sets**

Permission Set
Custom Permission Set

Find Settings... | Clone Delete Edit Properties Manage Assignments

Permission Set Overview > App Permissions

App Permissions Edit

▼ Call Center

Permission Name	Enabled	Description
Access Conversation Entries	<input type="checkbox"/>	Grants users access to Conversation Entries
Agent Initiated Outbound Messaging	<input type="checkbox"/>	Initiate messaging with customers.
Configure Messaging	<input type="checkbox"/>	Configure Messaging settings.
Edit Case Comments	<input type="checkbox"/>	Edit their own case comments but not other user's comments.
End Messaging Session	<input type="checkbox"/>	End in-progress Messaging sessions with end users.
Import Solutions	<input type="checkbox"/>	Import solutions for the organization.

Step 6: Find "Query All Files" and enable the checkbox next to "Query All Files".



SETUP

Permission Sets

<input type="checkbox"/>	Can transfer on multiple records	<input type="checkbox"/>	Can transfer on multiple records at the same time.
<input type="checkbox"/>	Transfer Cases	<input type="checkbox"/>	Change a case's owner.

Content

Permission Name	Enabled	Description
Manage Content Permissions	<input type="checkbox"/>	Create, edit, and delete library permissions in Salesforce CRM Content.
Manage Content Properties	<input type="checkbox"/>	Create, edit, and delete custom fields in Salesforce CRM Content.
Manage record types and layouts for Files	<input type="checkbox"/>	Create, edit, and delete content types in Salesforce CRM Content.
Manage Salesforce CRM Content	<input type="checkbox"/>	Create, edit, and delete libraries and library memberships.
Query All Files	<input checked="" type="checkbox"/>	Allows View All Data users to SOQL query all files in the org.

Step 7 :On the same page find "View and Edit Converted Leads" and enable the checkbox next to "View and Edit Converted Leads"



SETUP

Permission Sets

Partner Relationship Management

Permission Name	Enabled	Description
IP Restrict Requests	<input type="checkbox"/>	Restrict what IP addresses can access in the PRM Portal.

Sales

Permission Name	Enabled	Description
Access to view Data Assessment	<input type="checkbox"/>	Access to view Data Assessment. Data Assessment provides a summary of account data.
Activate Contracts	<input type="checkbox"/>	Change contract status to Activated.
Activate Orders	<input type="checkbox"/>	Change order status to Activated.
Convert Leads	<input type="checkbox"/>	Convert leads into accounts, contacts, and opportunities.
Delete Activated Contracts	<input type="checkbox"/>	Delete contracts, regardless of their status.
Edit Activated Orders	<input type="checkbox"/>	Edit an order record once it is activated.
Edit Opportunity Product Sales Price	<input type="checkbox"/>	Change the sales price on opportunity line items.
Import Leads	<input type="checkbox"/>	Import leads and update campaign history.
Import Personal Contacts	<input type="checkbox"/>	Import personal accounts and contacts.
Manage Leads	<input type="checkbox"/>	Change the status of multiple leads in a list view.
Send Stay-in-Touch Requests	<input type="checkbox"/>	Send Stay-in-Touch update emails.
Transfer Leads	<input type="checkbox"/>	Change a lead's owner.
Use Team Reassignment Wizards	<input type="checkbox"/>	Mass reassign account team and opportunity team members.
View and Edit Converted Leads	<input checked="" type="checkbox"/>	View and edit converted lead records.

Step 8: Click on the "Save" button.

SETUP
Permission Sets

Permission Set
Custom Permission Set

Find Settings... Clone Delete Edit Properties Manage Assignments

Permission Set Overview > App Permissions

App Permissions **Save** Cancel

Call Center

Permission Name	Enabled	Description
Access Conversation Entries	<input type="checkbox"/>	Grants users access to Conversation Entries
Agent Initiated Outbound Messaging	<input type="checkbox"/>	Initiate messaging with customers.
Configure Messaging	<input type="checkbox"/> i	Configure Messaging settings.
Edit Case Comments	<input type="checkbox"/> i	Edit their own case comments but not other user's comments.
End Messaging Session	<input type="checkbox"/>	End in-progress Messaging sessions with end users.
Import Solutions	<input type="checkbox"/> i	Import solutions for the organization.

Step 9: Scroll down to System Permissions and click on the link to enable "Bulk API Hard Delete".

SETUP
Permission Sets

Define access to data categories

Custom Permissions
Permissions to access custom processes and apps

Custom Metadata Types
Permissions to access custom metadata types

Custom Setting Definitions
Permissions to access custom settings

System

Settings that apply across all apps, such as record and user management
[Learn More](#)

System Permissions
Permissions to perform actions that apply across apps, such as "Modify All Data"

Service Providers
Permissions that let users switch to other websites using single sign-on.

Step 10: Click on the Edit button to make changes.

SETUP **Permission Sets**

Permission Set
Custom Permission Set

Find Settings... Clone Delete Edit Properties Manage Assignments

Permission Set Overview > System Permissions

System Permissions Edit

▼ System

Permission Name	Enabled	Description
Access Activities	<input type="checkbox"/>	Access tasks, events, calendar, and email.
Access Customer Asset Lifecycle Management APIs	<input type="checkbox"/>	Use APIs to manage lifecycle-managed assets.
Access Custom Mobile Apps	<input type="checkbox"/>	Allow user to run custom mobile apps.
Access drag-and-drop content builder	<input type="checkbox"/>	Create and manage email templates and content in a drag-and-drop builder.
Access Experience Management	<input type="checkbox"/>	Access pages and dashboards available in Experience Management.
Access Libraries	<input type="checkbox"/>	Access libraries.

Step 11: Find "Bulk API Hard Delete" and enable the checkbox next to "Bulk API Hard Delete".

SETUP **Permission Sets**

Allow user to modify Private Connections	<input type="checkbox"/>	Allow users to modify Private Connections through the metadata, tooling, and Connect APIs.
Apex REST Services	<input type="checkbox"/>	Allow access to Apex REST services.
API Enabled	<input type="checkbox"/>	Access any Salesforce.com API.
Assign Topics	<input type="checkbox"/>	Assign existing topics to feed items. Remove topics from feed items.
Author Apex	<input type="checkbox"/>	Create Apex classes and triggers.
Bulk API Hard Delete	<input checked="" type="checkbox"/>	Delete records in the Bulk API without storing them in the Recycle Bin.
Can Approve Feed Post and Comment	<input type="checkbox"/>	Lets users control the visibility of content to other users by updating the status of a feed item or comment from pending review to published or from review.
Change Dashboard Colors	<input type="checkbox"/>	Choose dashboard color theme and palette.
Chatter Internal User	<input type="checkbox"/>	Use all Chatter features.
Close Conversation Threads	<input type="checkbox"/>	Close conversation threads in profile, group, and topic feeds in Experience Cloud sites.
Configure Custom Recommendations	<input type="checkbox"/>	Add custom recommendations in the feed, motivating users to get engaged and take action.
Connect Organization to Environment Hub	<input type="checkbox"/>	Allows a user to connect this organization to an Environment Hub.
Connect Org to Customer 360 Data Manager	<input type="checkbox"/>	Allows a user to connect the org to Customer 360 Data Manager.
Connect Org to Salesforce CDP	<input type="checkbox"/>	Allows a user to connect the org to Salesforce CDP.
Create AI Insight Objects	<input type="checkbox"/>	Create objects associated with AI record insights, including the insight, value, reason, and feedback.
Create and Customize Dashboards	<input type="checkbox"/>	Create, edit, and delete dashboards in personal folders.

Step 12: Click on the "Save" button.

SETUP
Permission Sets

Permission Set
Custom Permission Set

Find Settings... | Clone Delete Edit Properties Manage Assignments

Permission Set Overview > **System Permissions**

System Permissions Save Cancel

▼ **System**

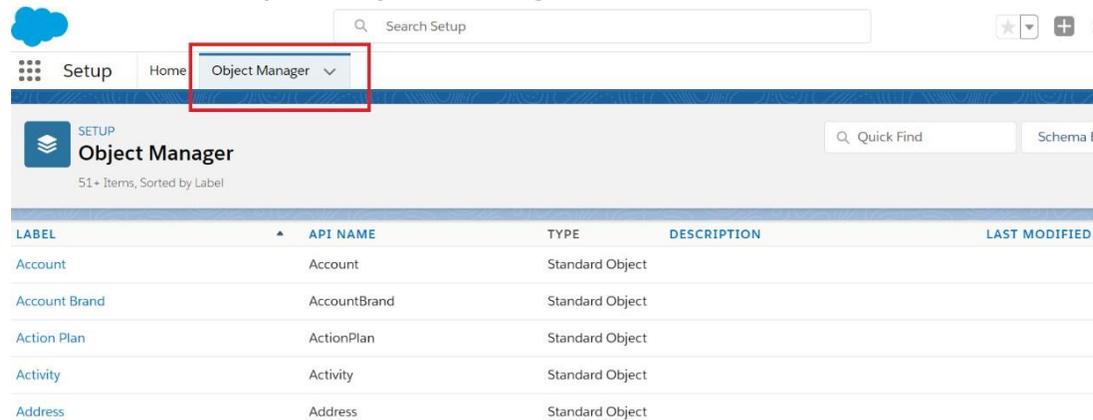
Permission Name	Enabled	Description
Access Activities	<input type="checkbox"/>	Access tasks, events, calendar, and email.
Access Customer Asset Lifecycle Management APIs	<input type="checkbox"/>	Use APIs to manage lifecycle-managed assets.
Access Custom Mobile Apps	<input type="checkbox"/>	Allow user to run custom mobile apps.
Access drag-and-drop content builder	<input type="checkbox"/>	Create and manage email templates and content in a drag-and-drop builder.
Access Experience Management	<input type="checkbox"/>	Access pages and dashboards available in Experience Management.
Access Libraries	<input type="checkbox"/>	Access libraries.

Now user can assign this permission set to the appropriate user if it is not assigned already as explained above in Option 1.

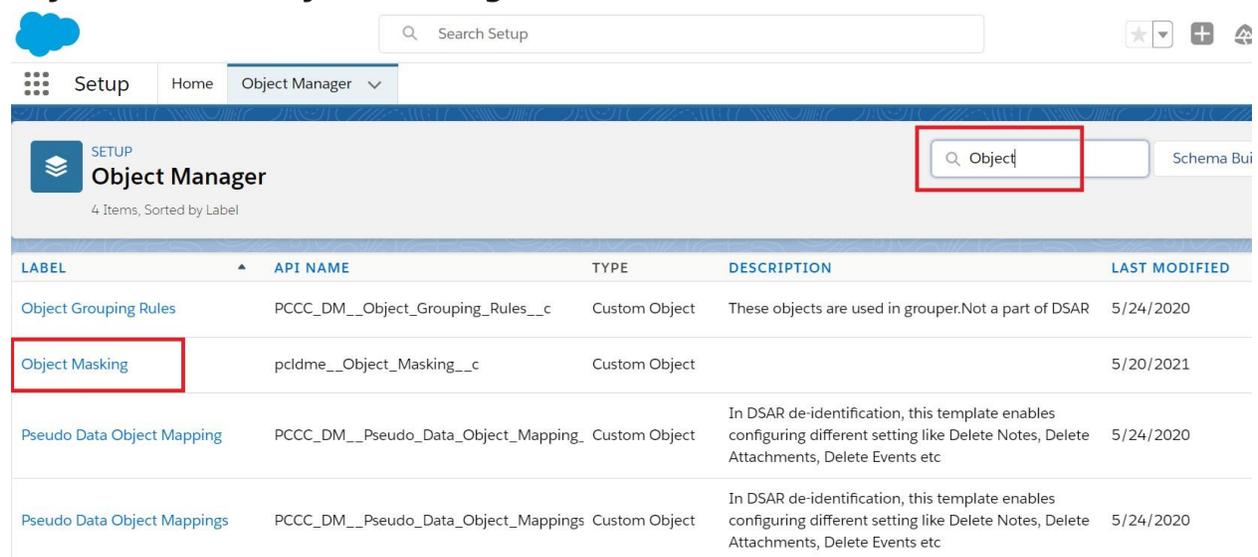
Step 4: Assign Page Layouts

Data Masker has provided different page layouts for “Masking” and “Deletion”. A masking Page layout is used if a user wants to add field masking. whereas “Deletion Page Layout” is used when the user is going to perform delete records operation as users don’t use field masking for “Delete Records”.

1. Go to the Setup → Object Manager tab



2. Enter “Object Masking” in the Quick Find box and press enter. Click on the object named “Object Masking” in the search result.



3. Click on “Page Layout” as shown below in the image.

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Object Masking

Details

- Details
- Fields & Relationships
- Page Layouts**
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits

Details

Description

API Name: pclme__Object_Masking__c

Custom:

Singular Label: Object Masking

Plural Label: Object Maskings

Enable Reports

Track Activities

Track Field History

Deployment Status: Deployed

4. Click on the "Page Layout Assignment" button to add page layout.

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Object Masking

Page Layouts

3 Items, Sorted by Page Layout Name

Quick Find New Page Layout Assignment

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY	
delete - Object Masking Layout	Radha Hampihallikar, 5/20/2021, 11:49 AM	Radha Hampihallikar, 5/20/2021, 11:49 AM	▼
Mask- Object masking Layout	Radha Hampihallikar, 5/20/2021, 11:49 AM	Radha Hampihallikar, 5/20/2021, 11:49 AM	▼
Object Masking Layout	Radha Hampihallikar, 5/20/2021, 11:49 AM	Radha Hampihallikar, 5/20/2021, 11:49 AM	▼

5. User will find the below screen, there are three Record Types

1. Master
2. Delete Records
3. Mask Records

The user needs to Click on "Edit Assignment" to make changes.

« Back to Custom Object: Object Masking

The table below shows the page layout assignments for different record type and profile combinations.

Edit Assignment			
Profiles	Record Types		
	Master	Delete Records	Mask Records
Analytics Cloud Integration User	Mask- Object masking Layout	Mask- Object masking Layout	Mask- Object masking Layout
Analytics Cloud Security User	Mask- Object masking Layout	Mask- Object masking Layout	Mask- Object masking Layout
Chatter External User	Mask- Object masking Layout	Mask- Object masking Layout	Mask- Object masking Layout
Chatter Free User	Mask- Object masking Layout	Mask- Object masking Layout	Mask- Object masking Layout
Chatter Moderator User	Mask- Object masking Layout	Mask- Object masking Layout	Mask- Object masking Layout
Chatter Only User	Mask- Object masking Layout	Mask- Object masking Layout	Mask- Object masking Layout
Company Communities User	Mask- Object masking Layout	Mask- Object masking Layout	Mask- Object masking Layout

6. Select column "Delete Records" and choose "delete-Object Masking Layout" from the "Page Layout To Use" dropdown list and click on the Save button.

The table below shows the page layout assignments for different record type and profile combinations. Use SHIFT + click or click and drag to select a range of adjacent cells. Use CTRL + click to select multiple cells that are not adjacent. Then choose a new page layout from the dropdown.

Save Cancel			
Page Layout To Use: delete - Object Masking Layout 25 Selected 25 Changed			
Profiles	Record Types		
	Master	Delete Records	Mask Records
Analytics Cloud Integration User	Mask- Object masking Layout	delete - Object Masking Layout	Mask- Object masking Layout
Analytics Cloud Security User	Mask- Object masking Layout	delete - Object Masking Layout	Mask- Object masking Layout
Chatter External User	Mask- Object masking Layout	delete - Object Masking Layout	Mask- Object masking Layout
Chatter Free User	Mask- Object masking Layout	delete - Object Masking Layout	Mask- Object masking Layout
Chatter Moderator User	Mask- Object masking Layout	delete - Object Masking Layout	Mask- Object masking Layout
Chatter Only User	Mask- Object masking Layout	delete - Object Masking Layout	Mask- Object masking Layout
Company Communities User	Mask- Object masking Layout	delete - Object Masking Layout	Mask- Object masking Layout
Contract Manager	Mask- Object masking Layout	delete - Object Masking Layout	Mask- Object masking Layout
Customer Community Login User	Mask- Object masking Layout	delete - Object Masking Layout	Mask- Object masking Layout
Customer Community Plus Login User	Mask- Object masking Layout	delete - Object Masking Layout	Mask- Object masking Layout
Customer Community Plus User	Mask- Object masking Layout	delete - Object Masking Layout	Mask- Object masking Layout

7. After selecting the page layout "Delete Records", the user can see the change by adding an object masking record and going to the field masking section. Users will not see the Field Masking section.

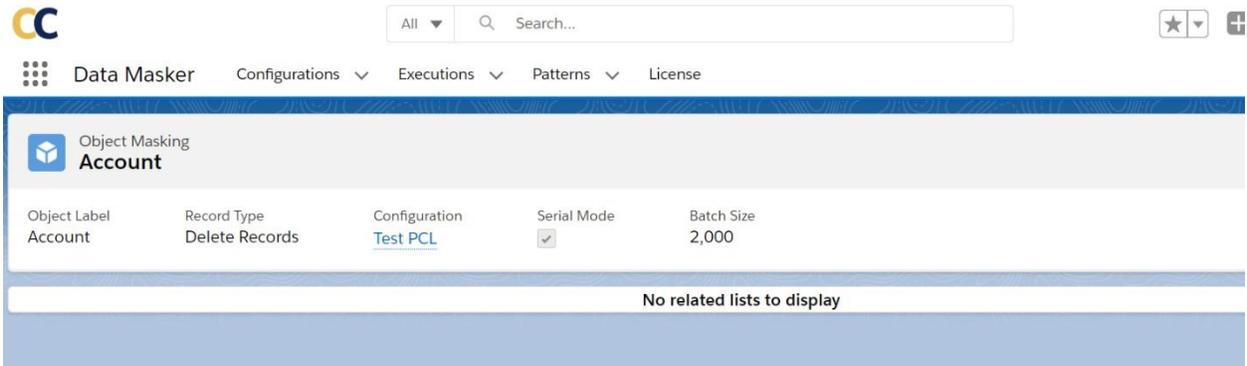
New Object Masking

Select a record type

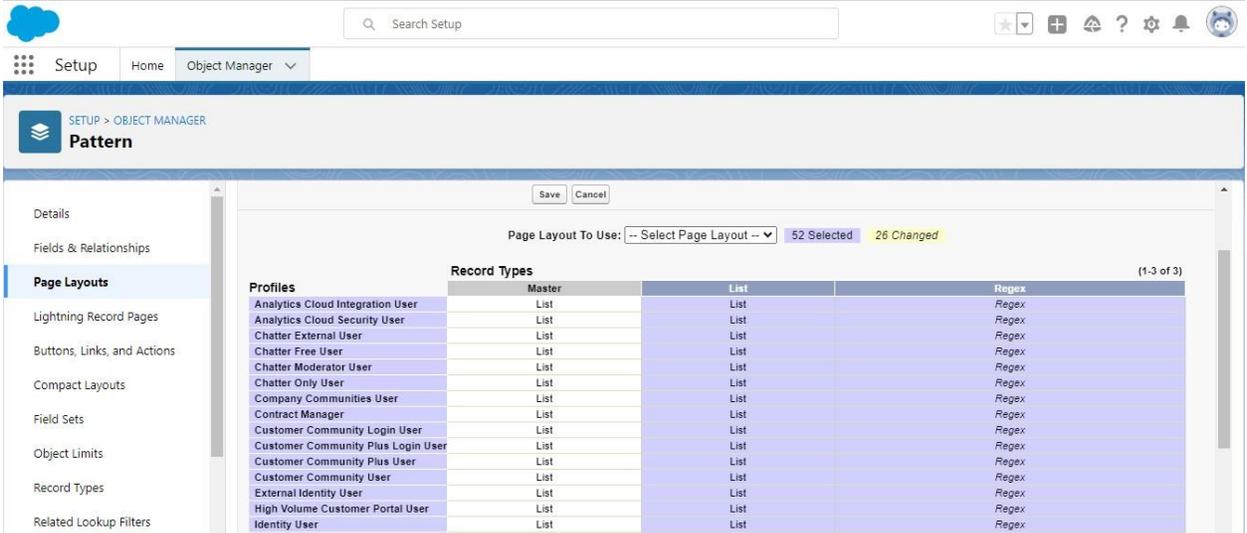
- Delete Records
Use this Record type if you want to Delete the records of the Object
- Mask Records
Use this Record type if you want to Replace or Erase field values of the Object

Cancel Next

8. The user will see the below page after adding object masking. No field masking section will appear.



9. Data Masker also has a page layout for pattern objects. To set the page layout for pattern object, users have to follow the same steps as above and select the appropriate pattern page layout for pattern object record types as shown in the below screenshot.

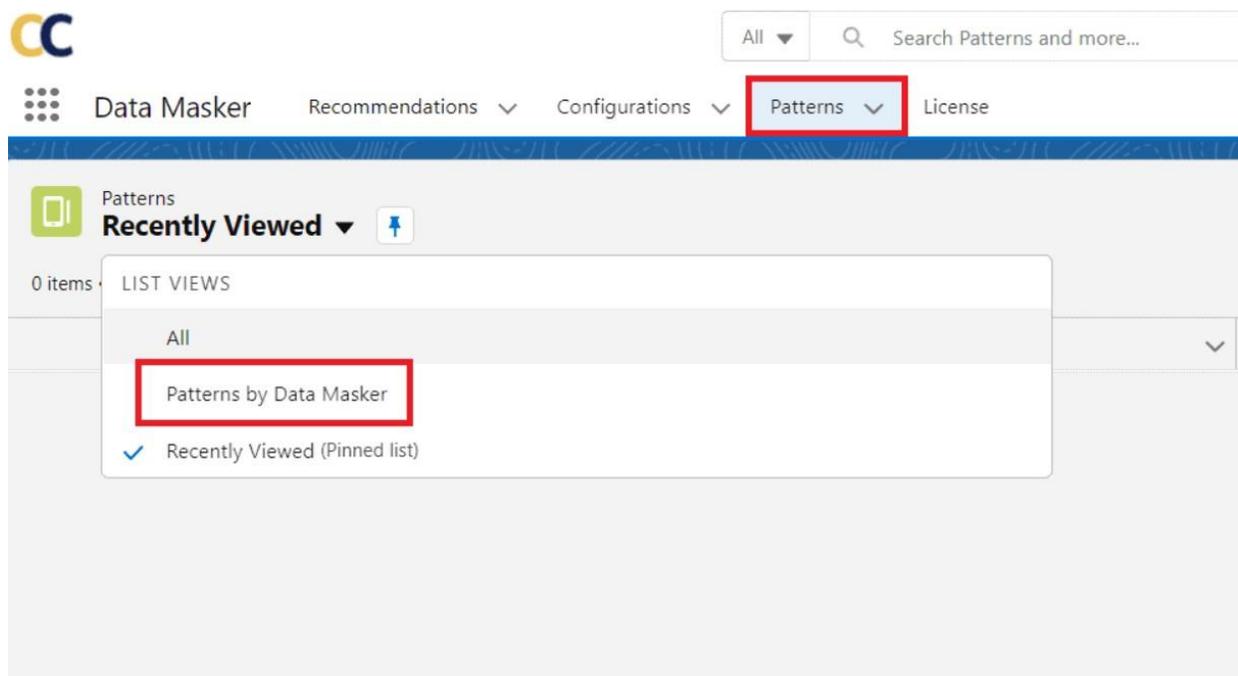


Step 3: Add Your Own Masking Patterns (Optional)

Patterns are nothing but a custom library of names, email, phone numbers that can be used for the masking data. After the Data masking process, field values in the records are updated with respect to the values associated with the pattern record.

Data Masker Application comes with some sample pattern records. Users can directly use these pattern records or can create their own.

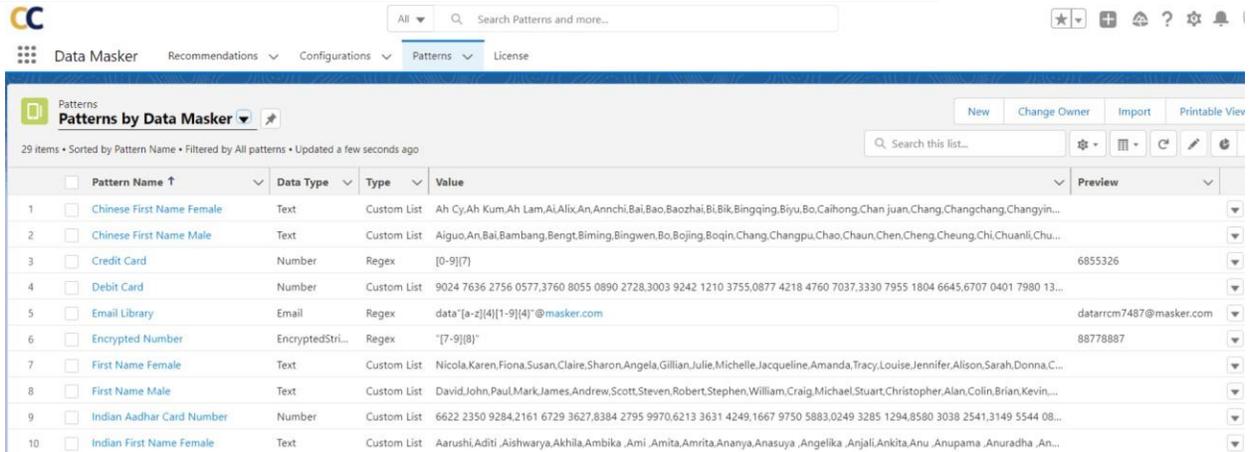
Navigate to Pattern tab and Select 'Patterns by Data Masker' list view to see sample pattern records provided by Data Masker Application.



There are total 8 sample patterns provided by Data Masker –

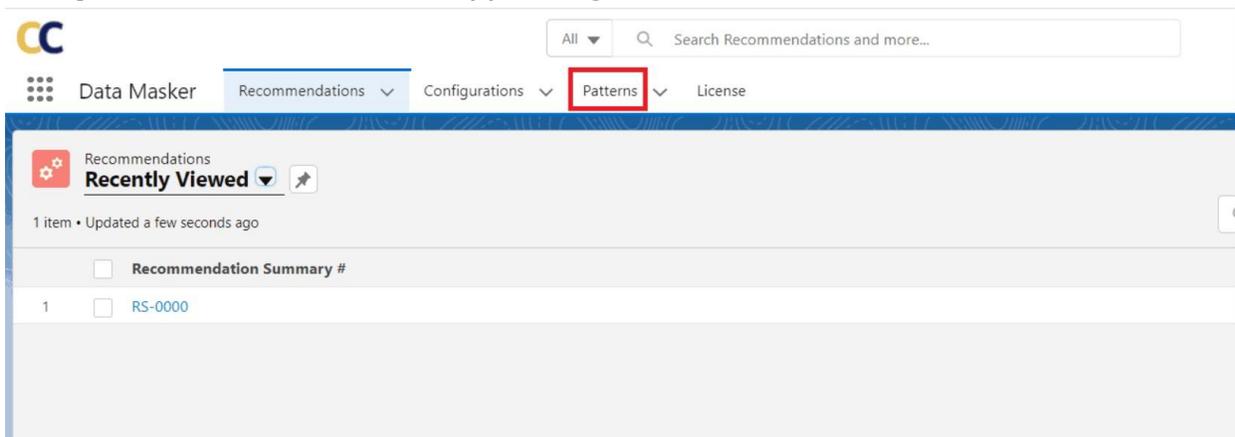
#	Pattern Name	Data Type	Action Type	Value	Preview
1	Email Library	Email	Regex	data"[a-z]{4}[1-9]{4}"@masker.com	datavpus5877@masker.com
2	Encrypted Number	EncryptedString	Regex	"[2-9]{8}[0-9]{8}"	3258774489431380
3	Phone Number (UK)	Phone	Regex	[0-9]{4} [0-9]{6}	6681 315413
4	Phone Number (USA)	Phone	Regex	(([0-9]{3})[0-9]{3}-[0-9]{4})	(461) 461-1569
5	Regex Number	Number	Regex	[0-9]{7}	5457148
6	First Name Female	Text	Custom List	There approx 300 comma-separated sample values provided in the Library e.g. Nicola, Karen, Fiona, Susan, etc	
7	First Name Male	Text	Custom List	There approx 600 comma-separated sample values provided in the Library e.g. David, John, Paul, Mark, Jame, etc	
8	Last Name	Text	Custom List	There approx 300 comma-separated	

				sample values provided in the Library e.g. Juniper, Justice, Justine, etc
--	--	--	--	---

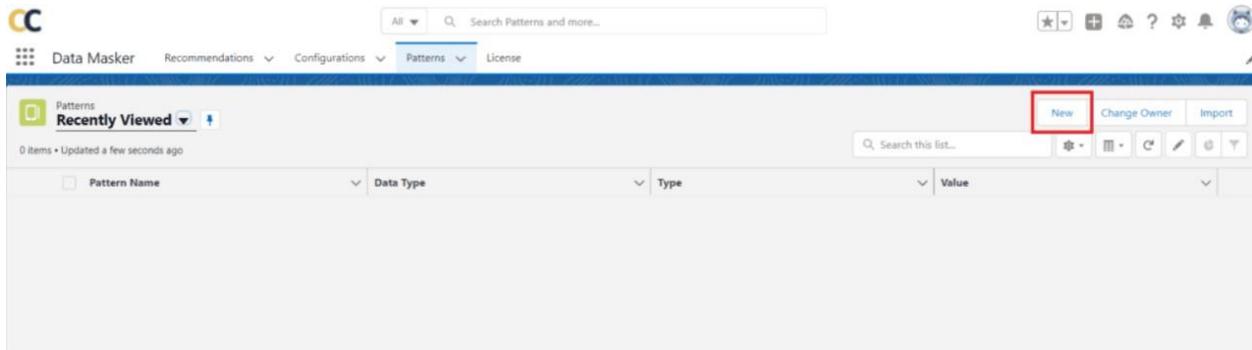


The procedure to create a new pattern record is as follows –

Step 1: In the Data Masker app, navigate to the “Patterns” tab .



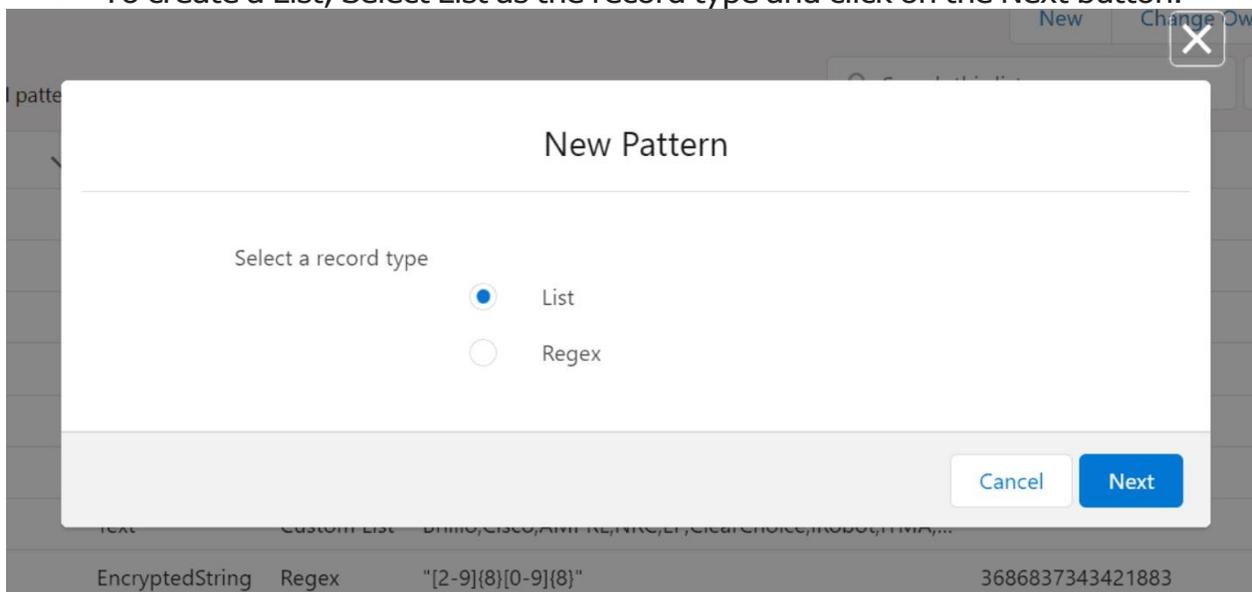
Step 2: Now click on the “New” button.



Step 3: Select the type of patterns.

Users can create two types of Pattern records: List and Regex.

1. List – It is a set of Library containing noticeable random data which is used for masking personally identifiable information. These libraries can be usually used to mask fields of the type Text, Address. For Example – FirstName, LastName, City, Country etc.
- To create a List, Select List as the record type and click on the Next button.



- Fill in all the details and Save the record.
- Pattern Name – Provide appropriate pattern name.
- Type – As the record type selected is List, the type will be auto-populated as Custom List.
- Data Type – Select data type as per the requirement. The available data type are as follows –
 1. Currency

2. Date
 3. Date/Time
 4. Email
 5. Number
 6. Percent
 7. Phone
 8. Text
 9. Text Area
 10. URL
 11. Encrypted String
- Value – This is the library containing different sets of recognizable values. For e.g., If the user wants to Mask Country field then the Value field should be populated with a set of different country names separated by a comma as shown in the image below.

New Pattern: List

Information

* Pattern Name	Country	* Type	Custom List
* Data Type	Text	Value	Afghanistan, Albania, Algeria, American Samoa, Andorra, Angola, Anguilla, Antarctica, Antigua and Barbuda, Argentina, Armenia, Aruba, Australia, Austria, Azerbaijan, Bahamas, Bahrain, Bangladesh, Barbados, Belarus, Belgium, Belize, Benin, Bermuda, Bhutan, Bolivia, Bosnia and Herzegovina, Botswana

Cancel Save & New Save

2. **Regex** – The regular expression which is used to generate data using defined patterns. Basically, these are patterns used to match character combinations in strings. This can be used to mask fields of the type Email, Phone, Text, Numbers etc.

- To create Regex as a pattern, Select Regex as the record type and click on the next button.

New Pattern

Select a record type

List

Regex

Cancel Next

- Fill in all the details and Save the record.
 - Pattern Name – Provide appropriate pattern name.
 - Type – As the record type selected is Regex, the type will be auto populated as Regex.
 - Data Type – Select data type as per the requirement. The available data type are as follows –

- Email
- Number
- Phone
- Text
- Text Area
- URL
- Encrypted String
- **Value** – In this user needs to define the pattern or sequence of how he wants to mask a particular field. Considering Phone number as the field that needs to be masked here is the sample REGEX for Phone number in USA format

`([0-9]{3}) [0-9]{3}-[0-9]{4}`

New Pattern: Regex

Information

<p>* Pattern Name ↶</p> <input style="width: 90%;" type="text" value="Phone Number"/>	<p>* Type</p> <div style="border: 1px solid #ccc; padding: 2px;">Regex</div>
<p>* Data Type ↶</p> <div style="border: 1px solid #ccc; padding: 2px;">Phone</div>	<p>Value ↶</p> <div style="border: 1px solid #ccc; padding: 2px;">[0-9]{4} [0-9]{6}</div>

Cancel Save & New Save

Once the record gets saved, the user can see the Pattern details and also the preview field which shows the actual sample value of the Regex expression. So the user can compare and verify whether the pattern value matches with the business use case or not.

CC
All ▾ 🔍 Search Patterns and more...
★ ▾ + 🗑️ ? ⚙️ 🔔 👤

☰ Data Masker
Recommendations ▾
Configurations ▾
Patterns ▾
License

Pattern
New Contact Edit New Opportunity ▾

Phone Number(UK)

Pattern Name	Type
Phone Number(UK)	Regex
Data Type	Value
Phone	[0-9]{4} [0-9]{6}
	Preview
	9372 855621

In this way, users can create more pattern records either of the type list or Regex based on the requirement.

Step 5: Masking User Records (Optional)

Step-by-step instructions (assumes an installed product with appropriate permission sets assigned):

1. Initial configuration, test and validate: Do this in a Dev Sandbox first
 - a. Start by creating a SOQL to filter out users that do NOT need to be masked. Test the SOQL from the workbench or other SOQL editors to make sure it works well.

Note: This is a crucial step to get right, as any users not in this query will be masked and inactivated.

```
//This query will show the details of the users that WILL BE MASKED.

//Make sure to put all user ids that do not need to be masked in the SOQL query. Especially add user ids of Site guest
Integration & Platform Integration users.

//You can also use other criteria such as profile name, role or others that DO NOT CHANGE between Prod and Sandbo

//Do NOT use username as it changes between prod and sandboxes.

select id, name, username, profileid from user where Id not in ('0054K000002hqbxQAA', '0054K000002hqbxQAA', '00
'0054K000003PklrQAC',
'0054K000003PklvQAC')

//Use your user record's Id, not the ones provided here for example.
```

2. Copy the filter criteria (Everything after the 'where' in the SOQL clause)

```
//From the query above, the filter criteria is the following Id not in ('0054K000002hqbtQAA',
'0054K000002hqbxQAA', '0054K000003PkltQAC', '0054K000003PklrQAC', '0054K000003PklvQAC' )
```

3. Navigate to Data Masker App Configuration and modify (or add) a Configuration

Configurations	
Configuration Name	Description
1 Mask User Data	Masking configuration to mask and inactivate user records in a sandbox.
2 Personal data mask	Masking configuration for leads, contacts and accounts.

4. Navigate to the configuration details view. Click the “New” button and select the record type ‘Mask Records’ and further add an object for “User” (if one does not exist). Make sure to add the filter criteria as shown below.

New Object Masking

Select Object

User

Select Group

Group 1

Sequence

10

Use Bulk Api

Batch Size

2,000

Filter Criteria

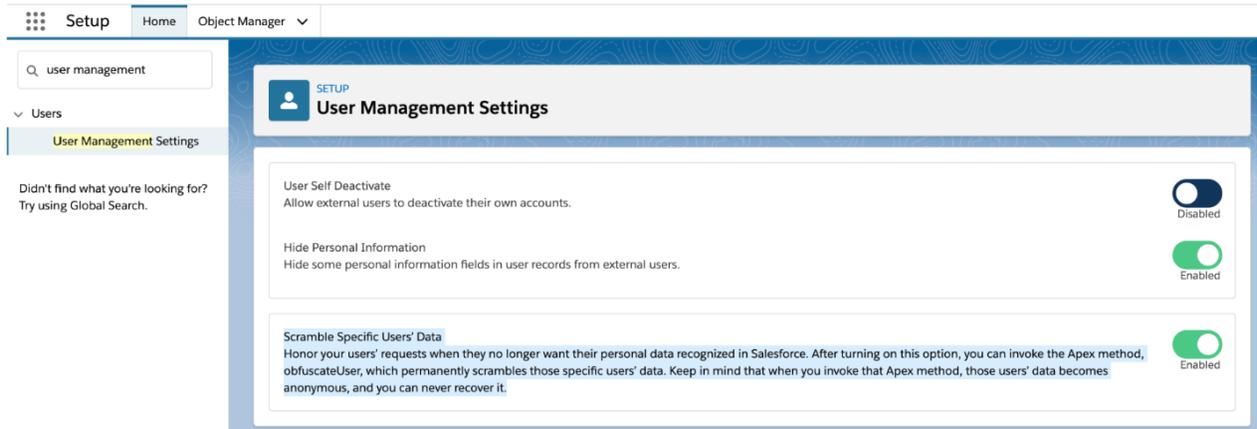
Id not in ('0054K000002hqbtQAA','0054K000002HqbxQAA','0054K000003PkItQAC','0054K000003PkIrQAC','0054K000003PkIvQAC')

Save Cancel

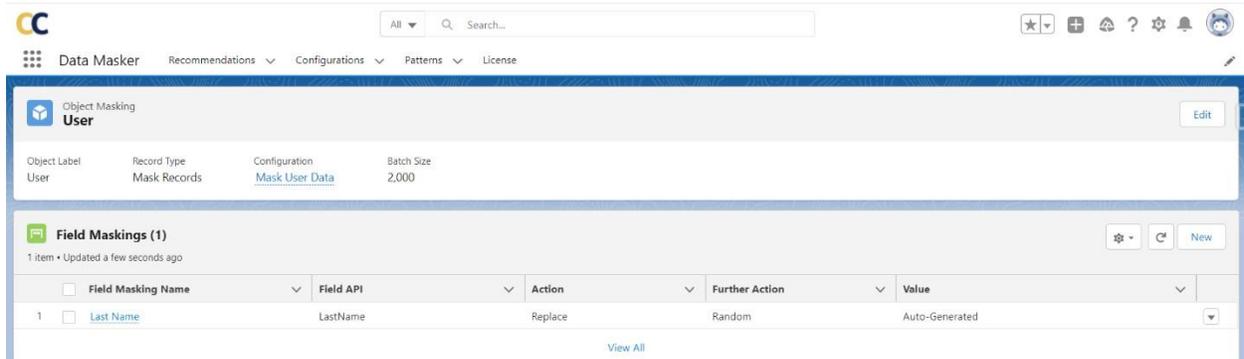
Your completed record would look similar to this.

Object Ma...	Record Type	Group	Sequence	Filter Criteria	Use Bulk Api	Batch Size
1 User	Mask Records	Group 1	10	Id not in ('0054K000002hqbtQAA','0054K000002HqbxQAA','0054K000003PkItQAC','0054K000003P...	<input type="checkbox"/>	2,000

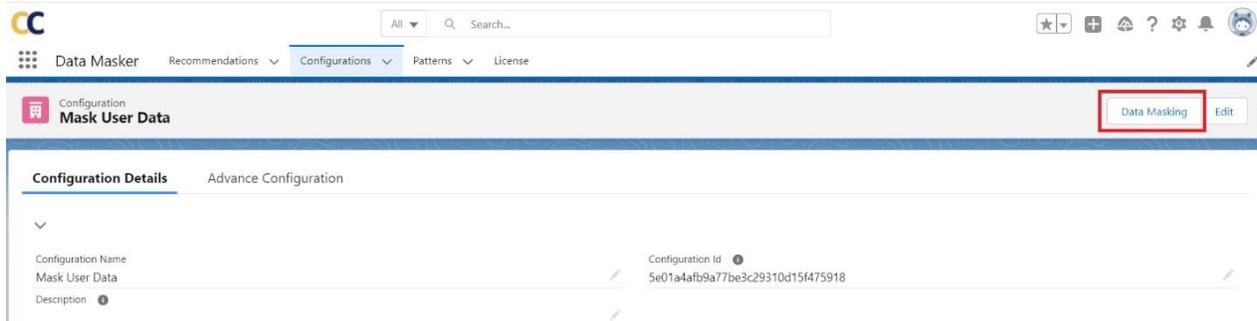
5. Navigate to Setup Users User Management Settings and enable "Scramble Specific Users' Data".



6. Create a new mapping for the 'User' Object, and add the 'Full Name' field for replacement with 'Random'. This is all that is needed. Note: Data Masker uses a Salesforce-provided API that will mask the entire user record, inactivate it and no email or notification will be sent to the user.



7. Invoke Data Masker from 'Configuration' 'Data Masking' button



8. Select "Mask specific".

Data Masking



Welcome to Data Masker.
Please select an appropriate masking option.



* Masking Options

- Mask All
- Mask Specific

Next

9. Select the "User" object in the next screen and continue till the end of the wizard to begin execution.

Data Masking

▼ Group 1

<input type="checkbox"/> Object Label	Object Api Name	Filter Criteria
<input checked="" type="checkbox"/> User	User	Id = '0055j000005CHxQAAW'
<input type="checkbox"/> Attachment	Attachment	
<input type="checkbox"/> ContentDocument	ContentDocument	(ContentAssetId=null AND ContentAs...
<input type="checkbox"/> FeedItem	FeedItem	
<input type="checkbox"/> EmailMessage	EmailMessage	
<input type="checkbox"/> Event	Event	
<input type="checkbox"/> Note	Note	
<input type="checkbox"/> Task	Task	
<input type="checkbox"/> CaseComment	CaseComment	

Next

Data Masking



Proceed with the Next option if you want to Mask the Specific data or click Previous to select another option.

Previous

Next

10. Validate that the execution was successful by navigating to the data masker's 'Execution' tab.

The screenshot shows the Data Masker interface. At the top, there's a search bar and navigation links for Data Masker, Recommendations, Configurations, Patterns, License, and Contacts. The main content area is titled 'Execution-0020' and includes a 'Details' section with various metrics like Execution Name, Status (Completed), Records Total (1), and Start time (3/4/2022, 3:16 PM). Below this is an 'Execution Logs (1)' table with columns for Execution Log Status, Status, Records To..., Records Pr..., Records Er..., and Apex Job Id Link. A red box highlights the first row of the table, which shows a masked record.

Execution Log Status	Status	Records To...	Records Pr...	Records Er...	Apex Job Id Link
[Masked]	Masked	1	1	0	/7075j000013q2hSAAQ

11. Navigate to the user record to validate that it was successfully anonymized

The screenshot shows the Salesforce 'Users' setup page for user '398808404'. It includes a 'User Detail' section with fields for Name, Alias, Email, Username, Nickname, Title, Company, and Department. The 'Role' section shows 'User License: Salesforce Platform', 'Profile: Standard Platform User', and checkboxes for 'Active', 'Marketing User', 'Offline User', 'Sales Anywhere User', and 'Flow User'. Action buttons for 'Edit', 'Sharing', 'Reset Password', and 'Freeze' are also visible.

User Detail		Role	
Name	398808404	User License	Salesforce Platform
Alias	39880840	Profile	Standard Platform User
Email	398808404@398808404.com	Active	<input type="checkbox"/>
Username	bsl45nlmqm@6w1jasc9i3.com	Marketing User	<input type="checkbox"/>
Nickname	User16167021716454447191	Offline User	<input type="checkbox"/>
Title		Sales Anywhere User	<input type="checkbox"/>
Company		Flow User	<input type="checkbox"/>
Department			

This concludes the masking of user records in a Salesforce Sandbox.

Optional: Configure in Production so that it gets automatically propagated to full and partial copy sandboxes

Note: Data Masker is designed to not run in Production. We are configuring it here so that all Sandboxes created and refreshed after this step will always

have Data Masker as part of the Sandbox image. Full and partial copy sandboxes will also get this configuration. Make sure your Sandbox templates have our Objects 'Configuration, Object Masking & Field Masking' selected. However, Data Masker mappings are considered data and will not migrate to Dev and Dev Pro sandboxes. For those, you will have to manually create the configuration/mapping above.