Data Privacy, Protection and Security for Salesforce

Sponsored By: Cloud Compliance

The most comprehensive GDPR/CCPA App for Salesforce
AppExchange: bit.ly/dataprivacyapp

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Data Privacy, Protection and Security for Salesforce

> **What is data security?**

> Umm...It is like making your data wear a helmet ⛑️

> **Hmm..then what is data privacy?**

> Imagine your data is wearing a mask at Mardi Gras 🎭

> **Is it really that simple?**

> Not really. But I can't think of a better way 😜

> **What about laws regarding all of these?**

> How much time you got? It is a long discussion 😴

Definition of Data Security, Data Protection and Data Privacy may depend on who you ask.

A menagerie of the regulatory and compliance-related definition has not helped this either. However, concerns around data do continue to drive new regulations.

This makes compliance with the ever-changing landscape of regulations and data security threats an ongoing challenge.

Fortunately, Salesforce and its AppExchange partner ecosystem have been building capabilities for customers of all sizes, resulting in an array of choices.

This paper highlights common Data Privacy and Security use cases and our perspective.

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Formerly the Sr. Director of Global Enterprise Architecture at Salesforce, Saurabh has worked for 17+ years with CRM customers of all sizes.

His passion for 'Privacy by Design' solutions that are fast to implement, highly customizable and enterprise ready, led to Cloud Compliance.

This booklet is a compilation of use cases that we frequently hear from Salesforce customers. Drawing on our experience, we have shared our perspective indicated by a green checkmark. We hope this is useful.

If you have specific questions about Data Privacy or Data Security, please reach out to us on info@plumcloudlabs.com.

I need all my data stored on Salesforce to be encrypted including file attachments.

Options
- Build Your Own with Crypto API
- Salesforce Shield Data Encryption

✔ Shield encryption offers native Salesforce platform level encryption capabilities with advanced features including support for Hardware Security Modules.

I need to encrypt some custom text fields so that it is stored as encrypted in Salesforce

Options
- Build Your Own with Crypto API
- Salesforce Classic Encryption

✔ Classic encryption is a declarative and lightweight approach for basic encryption requirements.

"He's making a list, he's checking it twice, he's gonna find out who's naughty or nice, Santa Claus is in contravention of article 4 of the GDPR" – Joe(@mutablejoe)

I need to monitor what data my users are accessing, and be notified if they try to export data out of Salesforce.

Options
- Salesforce Shield Event Monitoring
- Salesforce Shield with AppExchange Apps

✔ Shield Event Monitoring logs and tracks up-to 48 events. Customers can further harness the capability of Shield with value add apps like Fair Warning, RevCult etc.

My security team needs to detect if Salesforce user's access has an unusual pattern such as different locations, IP addresses, too many downloads etc.

Options
- Third party (Authentication services)
- Salesforce Shield Activity Monitoring
- Salesforce Shield Threat Detection (Beta)

✔ Shield Threat detection offers anomaly reporting capabilities, and uses statistical and machine learning methods to detect threats to your Salesforce org.

"...the failure to protect personal data is not only a danger to consumers, it also poses one of the greatest threats to the long-term health of the high-tech industry itself." – Marc Benioff

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I need to keep track of data updates to specific fields in the recent past.

Options

- Salesforce Field History Tracking
- Salesforce Shield Field History

✔ Field History Tracking is a declarative and lightweight approach to track basic field changes for the last 18 months.

I need to keep track of data updates to a large number of fields over a long period of time.

Options

- Salesforce Field History Tracking
- Salesforce Shield Field History

✔ Shield Field History can track up-to 60 fields/object for over 10 years.

We shouldn't ask our customers to make a tradeoff between privacy and security. We need to offer them the best of both. Ultimately, protecting someone else's data protects all of us. – Tim Cook

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You can name your dog whatever you like, but be sure it is something you can remember. You may be using it as an answer to a security question for the rest of your life. – Somewhere on the internet

I need a way to remove personal data from Salesforce that is no longer needed.
Example: Leads lost 10 years ago.

Options

- Build Your Own - Batch/Schedule Apex
- Cloud Compliance's Policy based Data Retention
- Other AppExchange packages

✔ Custom Batch+Scheduled Apex can be developed in-house. Customers wanting to avoid custom code can quickly achieve policy-based Data retention via Cloud Compliance.

I need a basic way to log and track Data Privacy related requests (DSAR) in Salesforce.

Options

- Build Your Own - Web2Case / Email2Case
- Salesforce Communities
- Cloud Compliance Self Service Portal
- Other AppExchange Package

✔ Salesforce's Web2Case is the appropriate lightweight approach that enables site visitors to log data privacy cases.

I need to meet a legal requirement and manage customer's communication preferences in Salesforce.

• Build Your Own with Individual/Consent Objects
• Cloud Compliance Preference Management
• Other AppExchange Packages

Options

✓ Cloud Compliance manages all aspects of consent management including communication preferences, using Salesforce's native Individual and Consent objects.

How can I prevent Marketing Automation from sending email newsletter to leads that have opted-out.

• Build Your Own (Apex + Individual/Consent Objects)
• Unsubscribe using Marketing tools capabilities
• Cloud Compliance Salesforce-Marketing Integration
• Other AppExchange Packages

Options

✓ Salesforce standard data privacy objects are a good choice. Cloud Compliance makes it quick and easy to keep customer preferences in sync between Salesforce and Marketing Cloud/Pardot etc.

If you make customers unhappy in the physical world, they might each tell 6 friends. If you make customers unhappy on the Internet, they can each tell 6,000 friends. – Jeff Bezos

I want my Salesforce Sandbox to not contain any personal information of lead and contact such as Email, Phone, etc.

• Build Your Own with SandboxPostCopy Apex
• Salesforce Data Masking
• Cloud Compliance Sandbox Anonymization
• Other AppExchange Package

Options

✓ Custom sandbox anonymization solutions can vary from simple to fairly complex. Consider apps such as Salesforce Data Masking, Cloud Compliance, and others.

I want to meet the legal requirement to track objects and fields that store lead and contact personal information.

• Salesforce Data Classification Metadata Fields
• Cloud Compliance Personal Data Inventory Feature
• Other AppExchange Package

Options

✓ Salesforce data classification is a good start. To document additional compliance info e.g Personal data sources and whom it is shared with, consider apps such as Cloud Compliance.

Passwords are like underwear: make them personal, make them exotic, and change them on a regular basis. – overheard at SecureWorld Atlanta"

I need to extract personal data from multiple Salesforce objects for GDPR/CCPA portability requests received by my legal department.

• Manually identify/extract with data loader+reports
• Build Your Own with Apex
• Cloud Compliance Data Portability Feature
• Other AppExchange Package

Options

✓ Manual data extract may work for smaller orgs, but can be inconsistent and tedious. Apps such as Cloud Compliance automate and standardize data extraction across multiple objects.

My company received a data deletion/erasure request under GDPR/CCPA. How do I remove personal data from multiple objects in Salesforce?

• Identify/manually delete from multiple objects
• Build Your Own with Apex
• Cloud Compliance Data De-identification Feature
• Other AppExchange Package

Options

✓ Deletion can impact reporting, integration and loss of valuable non-personal data. Automate data anonymization with Cloud Compliance to avoid deletion and manual effort.

Cheat Sheet - Data Privacy, Protection and Security for Salesforce

Capability	Salesforce	AppExchange
Data and File Encryption	Shield	
Event Monitoring	Shield	
Extended Field History	Shield	
Sandbox Anonymization	Data Mask	Cloud Compliance
Shield Add-ons/Value add Apps		RevCult, Fair Warning etc
Data Backup		Own Backup, Odaseva etc.
Data Archiving		Own Backup, Odaseva etc.
Data Inventory	Metadata Classification Fields	Cloud Compliance
Data Portability	Reports	Cloud Compliance
Data Deletion / Erasure		Cloud Compliance
Data Retention & Minimization		Cloud Compliance
Consent Management	Consent Mgmt. Objects (with BYO)	Cloud Compliance
Self-service Preference thru Communities	Communities (with BYO)	Cloud Compliance
Self-service Preference Center		Cloud Compliance
Communication Preference Integration - Pardot		Cloud Compliance/Pardot Integration
Communication Preference Integration - Marketing Cloud		Cloud Compliance/SMC Integration
Generate/Match Individual records for Lead & Contact		Cloud Compliance
Consolidate Personal Data / Single View of Customer	Customer 360	

Cloud Compliance enables meaningful privacy controls with enterprise capabilities and a consumer grade user experience.

It is most comprehensive data privacy solution on AppExchange for GDPR, CCPA, HIPAA etc. Your data never leaves Salesforce because Cloud Compliance is 100% native.

Find us on AppExchange: bit.ly/dataprivacyapp