

# Secure Your Salesforce Org - FREE!

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Compliance



# 1 Assess Org Health

Resources	↔ References & Links	Notes
Health Check	Setup   Health Check Eg. <a href="https://yourdomain.lightning.force.com/lightning/setup/HealthCheck/home">https://yourdomain.lightning.force.com/lightning/setup/HealthCheck/home</a>	A tool to provide a score on some of your security settings
Portal Health Check	Setup   Portal Health Check Eg. <a href="https://yourdomain.lightning.force.com/lightning/setup/PortalSecurityReport/home">https://yourdomain.lightning.force.com/lightning/setup/PortalSecurityReport/home</a>	Assists in highlighting object access for communities that you may not expect.
Optimizer	Setup   Portal Health Check Eg. <a href="https://yourdomain.lightning.force.com/lightning/setup/SalesforceOptimizer/home">https://yourdomain.lightning.force.com/lightning/setup/SalesforceOptimizer/home</a>	Excellent general information & security checks. <ul style="list-style-type: none"><li>- Watch out for sharing rules.</li><li>- Go through Public Read/Write.</li><li>- A potential red flag as all users who have access to the object can read and write all records.</li></ul>



Mask Your Sandbox  
in 30 mins

# 2 Secure Your Application

Resources	↪ References & Links	Notes
Lightning Platform Code Security scanner	<a href="https://security.secure.force.com/security/tools/forcecom/scanner">https://security.secure.force.com/security/tools/forcecom/scanner</a>	Checkmarx and Salesforce bring you a static code analyser
Salesforce Security Guide	<a href="https://developer.salesforce.com/docs/atlas.enus.securityImplGuide.meta/securityImplGuide/salesforce_security_guide.htm">https://developer.salesforce.com/docs/atlas.enus.securityImplGuide.meta/securityImplGuide/salesforce_security_guide.htm</a>	A good overview of the Salesforce security settings
API Access Control Feature	<a href="https://help.salesforce.com/s/articleView?id=sf.security_api_access_control_about.htm&amp;type=5">https://help.salesforce.com/s/articleView?id=sf.security_api_access_control_about.htm&amp;type=5</a>	A feature that needs to be enabled by Tech Support. Before enabling in production, test in a sandbox as all unapproved apps will get disabled.



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# 3 Secure Your Data

Resources	↔ References & Links	Notes
Configure Communities security for Guest Users	<a href="https://help.salesforce.com/s/articleView?id=sf.networks_secure_community.htm&amp;type=5">https://help.salesforce.com/s/articleView?id=sf.networks_secure_community.htm&amp;type=5</a> <a href="https://compliance.salesforce.com/en/documents/a006e00000yTRBFAA4">https://compliance.salesforce.com/en/documents/a006e00000yTRBFAA4</a>	You will need a Salesforce production login to access the compliance website information.
Secure your Sandbox with <b>DataMasker</b> (AppExchange product)	<a href="https://appexchange.salesforce.com/listingDetail?listingId=a0N3u00000002JKEA1&amp;tab=e">https://appexchange.salesforce.com/listingDetail?listingId=a0N3u00000002JKEA1&amp;tab=e</a>	Contact us for a <a href="#">Free trial</a> —World's Fastest Salesforce Data Masking by Cloud Compliance.
Comply your production with <b>Data Retention &amp; Minimization</b> (AppExchange product)	<a href="https://appexchange.salesforce.com/listingDetail?listingId=a0N3A00000FADZgUAP">https://appexchange.salesforce.com/listingDetail?listingId=a0N3A00000FADZgUAP</a>	Contact us to sign up for <a href="#">Free trial</a> . Limit breach exposure by reducing your data footprint. Old data increases breach impact and storage cost.
Review "Who sees what" with Salesforce video series	<a href="https://www.youtube.com/playlist?list=PLFNbZmUNjID5ILGyXqm_1oJHcTDoLkW0W">https://www.youtube.com/playlist?list=PLFNbZmUNjID5ILGyXqm_1oJHcTDoLkW0W</a>	

"Ask for free trial"



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# Improve Security Awareness

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Resources	↪ References & Links	Notes
Security blogs : Platinum7	<a href="https://doug-merrett.medium.com/">https://doug-merrett.medium.com/</a>	
Security blogs : Cloud Compliance	<a href="https://cloudcompliance.app/resources/blogs/">https://cloudcompliance.app/resources/blogs/</a>	
Trailhead Security Superbadge	<a href="https://trailhead.salesforce.com/content/learn/superbadges/superbadge_security_specialist">https://trailhead.salesforce.com/content/learn/superbadges/superbadge_security_specialist</a>	
Trailhead Security Awareness	<a href="https://trailhead.salesforce.com/content/learn/modules/security-awareness-and-training">https://trailhead.salesforce.com/content/learn/modules/security-awareness-and-training</a>	



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# Improve Security Awareness

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Resources	↪ References & Links	Notes
Transformational Security Awareness: What Neuroscientists, Storytellers, and Marketers Can Teach Us About Driving Secure Behaviours	<a href="https://www.google.com/search?q=978-1119566342">https://www.google.com/search?q=978-1119566342</a>	This gives security leaders the information and resources they need to assemble and deliver effective security awareness programs that drive secure behaviours and culture change.
Salesforce 'Well Architected Secure'	<a href="https://architect.salesforce.com/well-architected/trusted/secure">https://architect.salesforce.com/well-architected/trusted/secure</a>	Good overview of architecture considerations for Salesforce security (MFA, Encryption, Data Security etc.)
Salesforce Developer's Security Microsite	<a href="https://developer.salesforce.com/developer-centers/security">https://developer.salesforce.com/developer-centers/security</a>	Discusses code security and has the Checkmarx scanner
Salesforce Admin's Security Microsite	<a href="https://admin.salesforce.com/security">https://admin.salesforce.com/security</a>	Good information for Admins around MFA and other security capabilities



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# Use AI Securely

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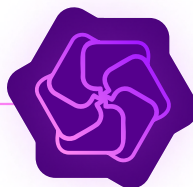


GPTfy is the Salesforce-native, enterprise-grade solution that accelerates your Salesforce integration with ChatGPT.

## GRUNT WORK Slows You



## AUTOMATE With AI Securely



## WIN & RETAIN Customers

- Personalized emails
- Case summary
- Account 360
- Sentiment analysis
- Intent analysis
- Chain of thought



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# Executive leadership

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