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Guide to Data Loss Prevention (DLP) on Salesforce

How to implement data loss prevention (DLP) on Salesforce to sensitive data leakage across objects, fields in production & sandbox organizations.

salesforce

Data leakage in context of Salesforce

For many organizations, Salesforce's cloud-based customer management (CRM) platform is a centerpiece of their marketing technology stack, with Salesforce making up over 23% of the CRM market.[1]

As with most SaaS applications, within Salesforce it is your organization's responsibility to determine whether Salesforce's default security settings meet your specific security and compliance obligations.

Many organizations will find that **cloud data protection** solutions are essential for maintaining both visibility and control over the large volumes of **unstructured data** stored in SaaS platforms like Salesforce.

1. "IDC, Worldwide Semiannual Software Tracker, October 2021" - Seeking Alpha

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What can contribute to data exposure risk in Salesforce?

- Salesforce environments present unique challenges for ensuring infosec best practices are followed:
  - Organizations may lack **dedicated stakeholders** explicitly responsible for understanding how security policies and best practices should inform Salesforce platform configuration
  - **Usage of standard, custom objects and fields must be actively audited** in accordance to compliance with PCI DSS, CCPA, HIPAA as well as security policies and practices.
  - **Sandbox organizations are often a lower priority**. However, this can be **a massive attack surface as sensitive data can be copied** from production to sandbox organizations.
  - **Emails, attachments, chatter messages** create complexity by expanding the number of places where data can live as well as the types of sensitive data security teams must look for.
  - **Very few organizations using Salesforce have classified their data** and therefore do not know what data is part of their risk surface or where it's even located.
  - **Internal data breaches are a serious threat.** The more users have access to sensitive data, the more risk there is to the Salesforce org.

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What are the consequences of data exposure risks?

- **Real-time security risks:** Sensitive data can be shared in standard or custom objects like case comments, accounts, or attachments and seen in real-time by unauthorized persons.

- **Sandbox data exposure:** Without automated tooling to mask sensitive data, manually managing data privacy in sandbox orgs is cumbersome and can lead to exposure incidents that result in non-compliance.

WESTLAW NEWS   NOVEMBER 21, 2020 / 4:03 AM / UPDATED A YEAR AGO

Hanna Andersson, Salesforce ink deal to settle CCPA data breach class action

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Best practices for protecting sensitive data in Salesforce

1. **Identify engaged stakeholders** who are Salesforce experts and make sensitive data protection in Salesforce a top priority by using security and compliance policies to determine the appropriate Salesforce security configurations and user best practices.

2. Implement the **appropriate security & privacy configurations** for your Salesforce instance based on your compliance and security policies (multi-factor authentication, field level encryption, etc) and ensure employees are educated on the importance of maintaining these configurations.

3. Invest in technologies like **cloud data loss prevention** (DLP) to enforce **consistent sensitive data protection policies across all your cloud applications** from a centralized product. DLP can also streamline Salesforce security across orgs to **auto-discover sensitive data, enforce protection controls and continually meet compliance** requirements.

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What is Data Loss Prevention (DLP)?

DLP ensures confidential or sensitive information (like credit card and social security numbers) isn't exposed outside of Salesforce by scanning for content within any standard or custom object and fields across production and sandbox organizations.

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How does Salesforce benefit from DLP?

Highly customizable CRM applications like Salesforce, with enormous amounts of sensitive data, create environments where data privacy and security best practices are difficult to maintain or enforce without an excessive time or resource commitment.

Data loss prevention helps provides companies with a feasible alternative to address this problem.

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Does Salesforce have DLP functionality built-in?

No, Salesforce relies on third-party apps (like Nightfall) to provide DLP functionality in Salesforce. Nightfall's Salesforce DLP package shall be available on the Salesforce AppExchange soon.
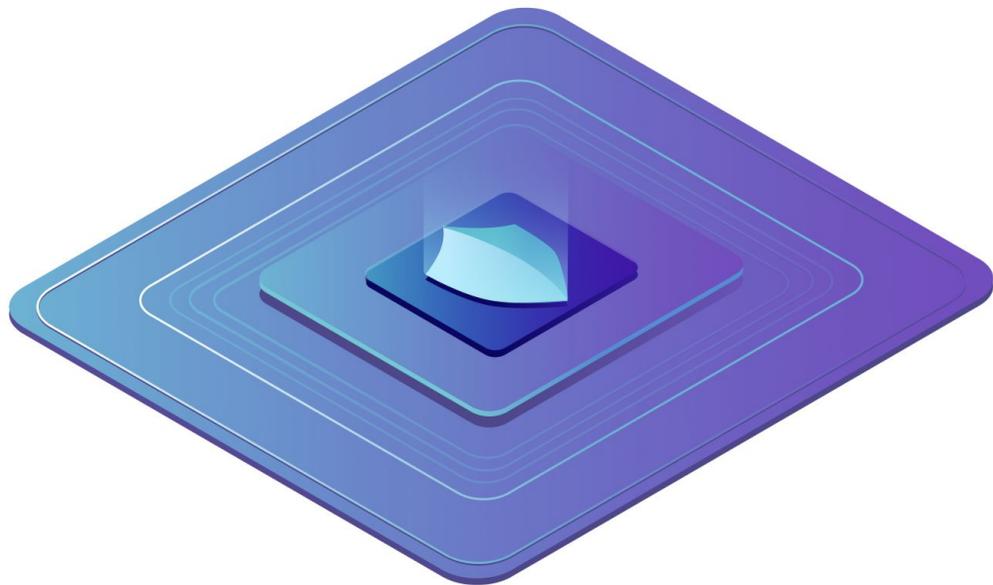
Designed for

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How do I implement DLP on Salesforce?

Grant access to your Salesforce org via OAuth 2.0. Nightfall's API based integration can start scanning selected objects in seconds.

No additional set up, tuning, or installed agents are required.

Request a free trial with us.

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Does Nightfall support any Salesforce edition?

Nightfall Enterprise is designed for:

- Salesforce Enterprise
- Salesforce Unlimited
- Salesforce Developer
- Salesforce Performance editions

Both production and sandbox organizations are supported. Nightfall creates Apex triggers to scan objects and fields in real-time across these editions.

Soon to be available in

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What is Nightfall?

- Nightfall is a platform to discover, classify, and protect sensitive data across cloud SaaS & data infrastructure via machine learning.
- Nightfall's Salesforce package auto-detects sensitive data in objects & fields in real-time.
- Get alerted & take remediative action within minutes.
- Nightfall supports compliance efforts with PCI, GDPR, HIPAA, CCPA, SOX, and many others.

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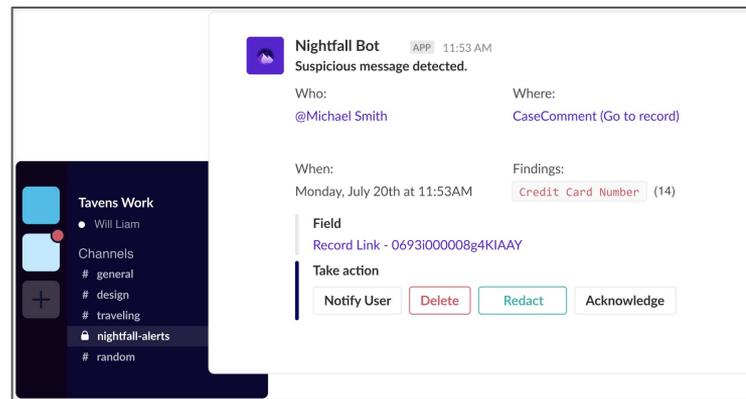
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Key Benefits

Get started now for free - no setup or tuning required.

Leverage multiple pre-tuned, standard detectors of PII out of the box.

Configure detection rules to fine-tune the conditions and contexts that trigger Nightfall detectors.

Apply policies with a high level of granularity to individual objects, fields in Salesforce.

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Enterprise-Grade Security

- **Does not store or track sensitive findings,** only non-identifying metadata is gathered to improve accuracy.

- TLS 1.2+ and AES 256 encryption.

- Fully hosted on AWS and GCP.

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Detectors

16M

Average # instances of sensitive data classified per month

Types of Detectors

👤 **Standard PII & Names**

👤 **ID Numbers**

$ **Finance & PCI**

📡 **Network & Geographical Addresses**

〜 **Health & PHI**

₿ **Credentials & Secrets**

⚙ **Custom Regexes & Word Lists**

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File Scanning Capabilities

Nightfall can scan common many file types, including images using optical character recognition

COMMON FILE TYPES

Plaintext

Google Drive file types

Open Office

Microsoft Office

Adobe PDF

HTML

XML

Images

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Standard, custom objects, fields ... and many more!

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Customer: Bluecore

Brent Lassi, CISO

Industry: SaaS, Retail Marketing Services

Use Cases: DLP, policy enforcement

"Nightfall helps us prove to our customers that we have a high level of hygiene diligence. Our clients want to know that we're responsibly managing their data."

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Case Study: Galileo Health

Michael Supon, Head of Security and Compliance

Industry: Healthcare

Employees: 55

Use Cases: HIPAA compliance, DLP,

credentials/secrets detection

"Nightfall's ease of setup and accuracy of identified data are both on point.
Nightfall has eased our collective mind."

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How do I get started?

To get started with Nightfall for Salesforce, schedule time with our product team by choosing a slot that works for you or email us at product@nightfall.ai with any questions.

Request a discovery call

Not ready yet? Learn more at www.nightfall.ai or contact us at sales@nightfall.ai.

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