2021

# StealthAUDIT®

## AnyData_SalesforceNotes User Guide

## v1.0

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# Contents

# Introduction

This document is designed to enable a user to install, configure, and execute AnyData_SalesforceNotes in their environment. AnyData_SalesforceNotes connects to a Salesforce tenant and scans Notes for sensitive data.

AnyData then aggregates sensitive data scan results into a view within the StealthAUDIT Access Information Center (AIC), which will show the Notes and user hierarchy of the scanned Salesforce tenant, which Notes contain sensitive data, which sensitive data criteria were found, and, optionally, the specific sensitive strings of text that were found.

***NOTE:*** *Only the modern Salesforce "ContentNote" objects will be scanned. Legacy "Notes" objects are not supported by this job.*

**IMPORTANT:** AnyData jobs do not support StealthAUDIT's job history functionality. For each AnyData job, ensure job history has been disabled (which will override global job history settings). Failure to disable job history for an AnyData job may result in data inaccuracies after multiple runs.

# AnyData for Salesforce Notes

This document describes the process for installing and configuring AnyData_SalesforceNotes into an environment where the StealthAUDIT Management Platform and AIC are already installed and running.

# Prerequisites

Prior to adding the AnyData_SalesforceNotes job to your StealthAUDIT environment, confirm you have administrator rights on the StealthAUDIT server, as well as enough rights to download or copy files to the server.

You will need:

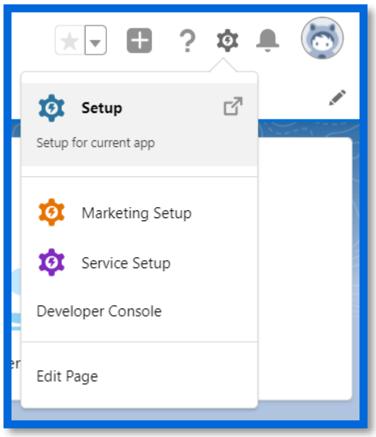
1. StealthAUDIT 11.5.0.127+
2. Access to Salesforce tenant, StealthAUDIT server, & SQL Server administrator accounts.
3. A Salesforce Connected App with enough permissions to download Notes.

Should the Salesforce Connected App not exist, this guide will walk you through how to create it in the target Salesforce tenant.

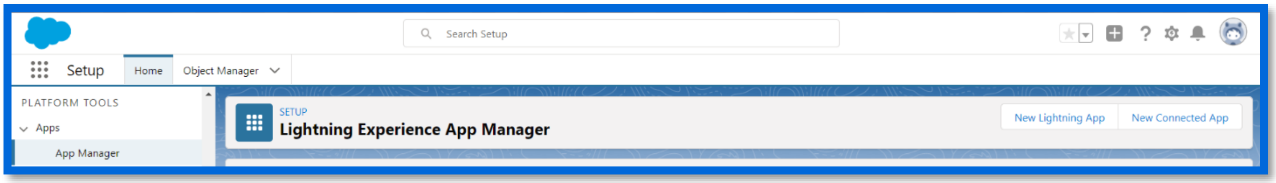
# Configuration

## Creating a Connected App in a Salesforce Tenant

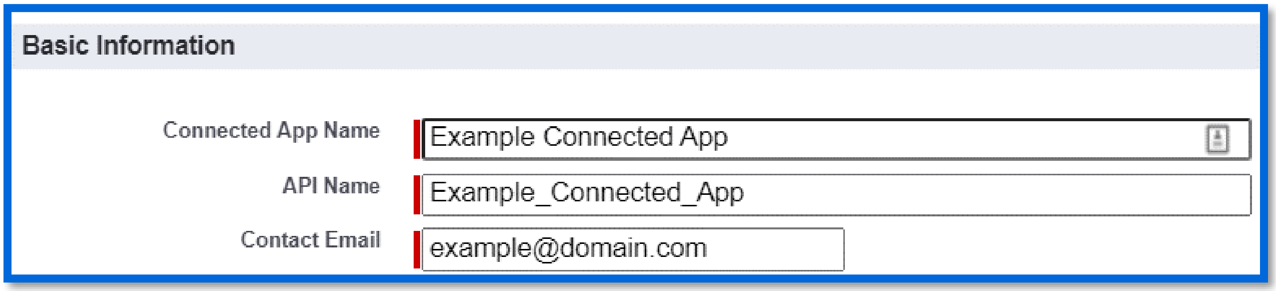
**Step 1 –** Log-in to the target Salesforce tenant as an admin and navigate to the **Gear Icon > Setup**.



**Step 2 –** In the left sidebar, navigate to **Apps > App Manager** under **Platform Tools**. Then, click **New Connected App** in the upper-right of the **Lightening Experience App Manager**.



**Step 3 –** Under **Basic Information**, fill out the following required fields to name the app. The email can be any email address, although it's recommended to make it the current Salesforce admin.



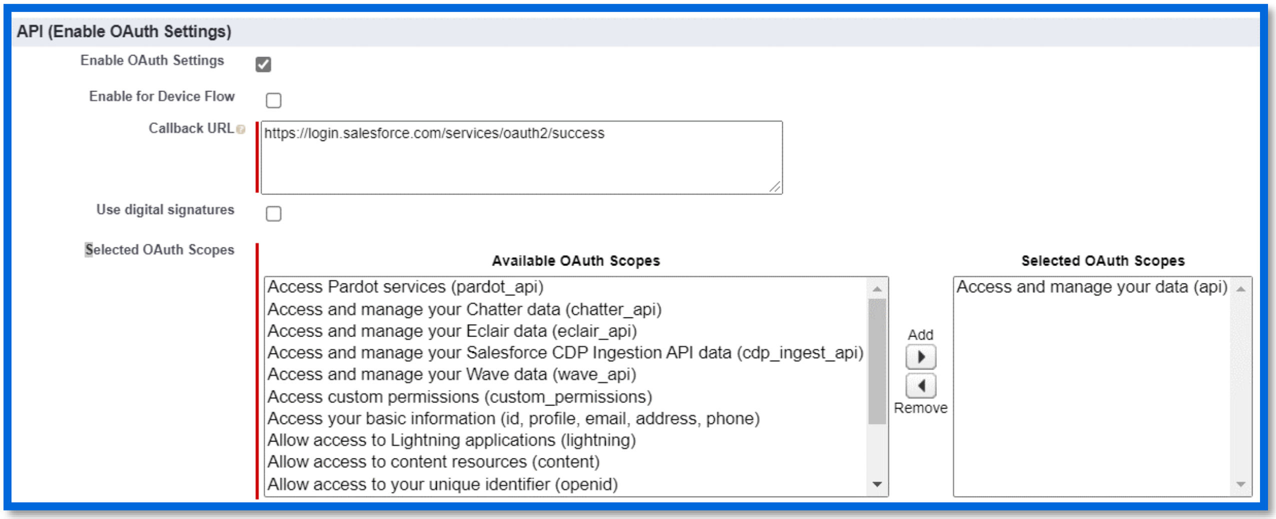
Basic Information

| | |
|---|---|
| Connected App Name | Example Connected App |
| API Name | Example_Connected_App |
| Contact Email | example@domain.com |

**Step 4 –** Under **API (Enable OAuth Settings)**, enter the following value in the **Callback URL** field:

```
https://login.salesforce.com/services/oauth2/success
```

**Step 5 –** Under **API (Enable OAuth Settings)**, look for **Access and managed your data (api)** under the **Available OAuth Scopes** list. When located, highlight that row, and click the **Add** arrow so the scope moves over to the **Selected OAuth Scopes** field.



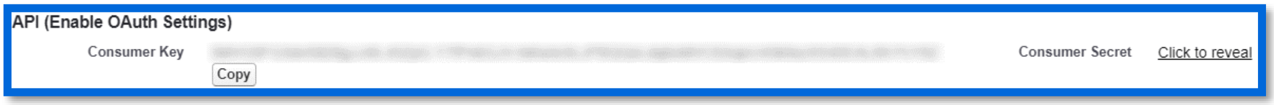
API (Enable OAuth Settings)

| | |
|---|---|
| Enable OAuth Settings | ☑ |
| Enable for Device Flow | □ |
| Callback URL | https://login.salesforce.com/services/oauth2/success |
| Use digital signatures | □ |
| Selected OAuth Scopes | |

| Available OAuth Scopes | Selected OAuth Scopes |
|---|---|
| Access Pardot services (pardot_api)<br>Access and manage your Chatter data (chatter_api)<br>Access and manage your Eclair data (eclair_api)<br>Access and manage your Salesforce CDP Ingestion API data (cdp_ingest_api)<br>Access and manage your Wave data (wave_api)<br>Access custom permissions (custom_permissions)<br>Access your basic information (id, profile, email, address, phone)<br>Allow access to Lightning applications (lightning)<br>Allow access to content resources (content)<br>Allow access to your unique identifier (openid) | Access and manage your data (api) |

**Step 6 –** Scroll back up to the top, click **Save**, then click **Continue**.

**Step 7 –** Scroll down and locate **API (Enable OAuth Settings)**. Note the **Consumer Key** and **Consumer Secret** (after clicking to reveal the latter). Both will be used as part of the Connection Profile in StealthAUDIT.



API (Enable OAuth Settings)

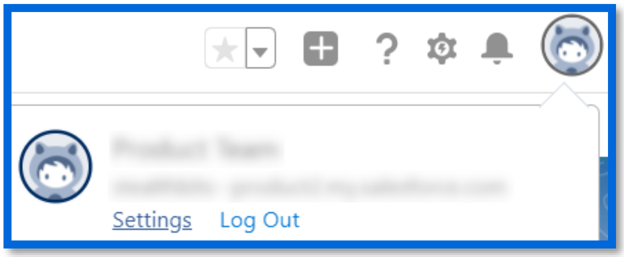
Consumer Key [redacted]

Consumer Secret Click to reveal

Finally, the Salesforce tenant's Security Token is required for API access. A tenant's Security Token is a secret value that applies to all Connected Apps, API requests, etc. If the Security Token is not known, then it must be reset to view the new one.

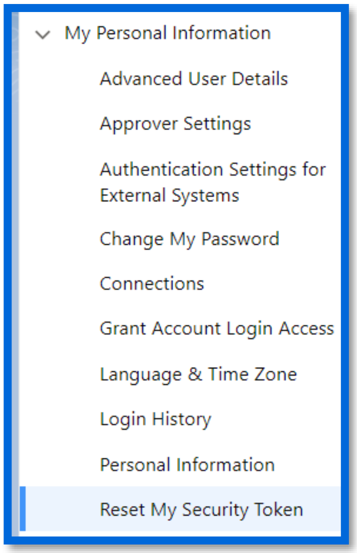
***IMPORTANT:*** *Resetting the Security Token to view the new one will interrupt any other Connected App or Salesforce API communications using the old Security Token.*

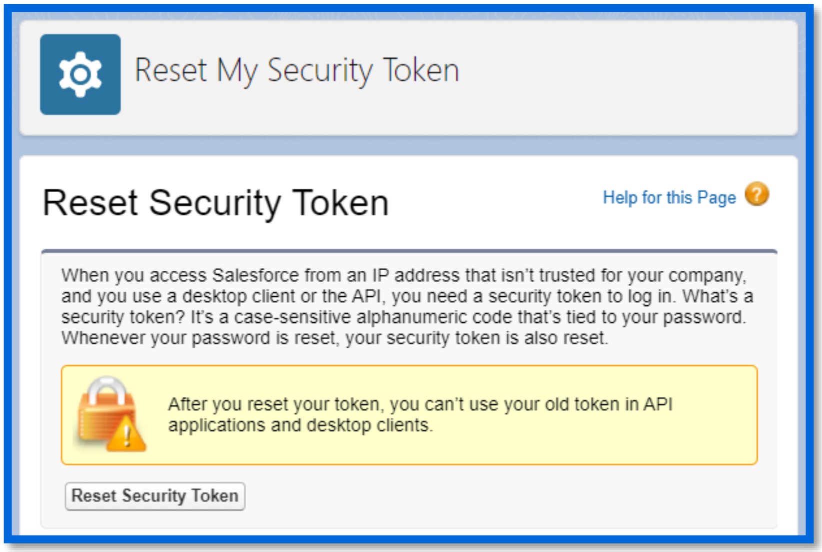
To reset the Security Token, click on the user icon in the upper-right, then click on **Settings**.



[redacted]

Under **My Personal Information**, click **Reset My Security Token** followed by **Reset Security Token**.





Reset My Security Token

Reset Security Token

When you access Salesforce from an IP address that isn't trusted for your company, and you use a desktop client or the API, you need a security token to log in. What's a security token? It's a case-sensitive alphanumeric code that's tied to your password. Whenever your password is reset, your security token is also reset.

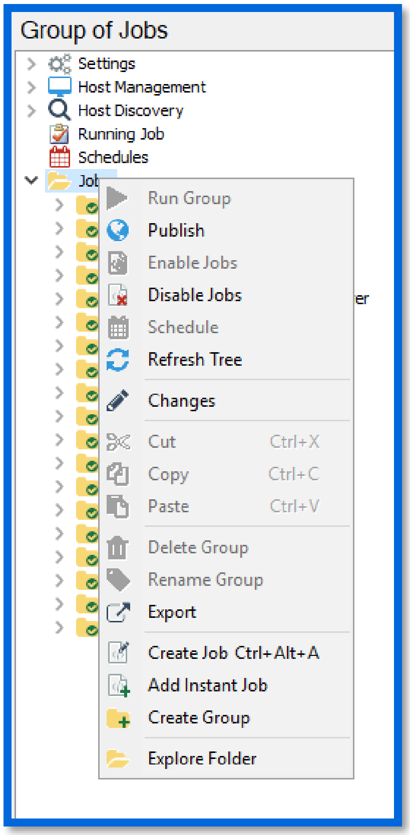
After you reset your token, you can't use your old token in API applications and desktop clients.

# Implementation

This section will walk through how to extract the package downloaded from the Stealthbits website, how to import the AnyData_SalesforceNotes job to StealthAUDIT, and how to configure and run the job to scan for sensitive data in Salesforce Notes.

## Extracting the Downloaded AnyData_SalesforceNotes Job

Step 1 – Create a new Group in the StealthAUDIT job hierarchy by right-clicking **Jobs** and clicking **Create Group**. Name the group however you chose, for example: AnyData for Salesforce



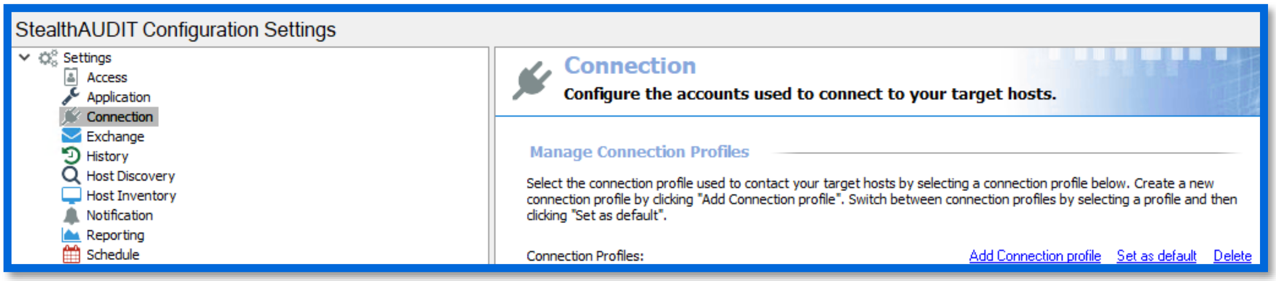
Step 2 – Right-click on the new Group and click **Explore Folder**. The directory that opens is where the AnyData_SalesforceNotes job that has been downloaded will be placed. Extract the job to this location and make sure any files in the job folder marked as read-only have that RO flag removed.

Step 3 – Right-click on the new Group and click **Refresh Tree**. The AnyData_SalesforceNotes job should now be visible within this Group in StealthAUDIT.

# Configuring the AnyData_SalesforceNotes Job

Now that the downloaded job has been imported to StealthAUDIT, you can configure it to scan for sensitive data in a Salesforce tenant's Notes.

Step 1 – Add a new set of credentials by navigating in the StealthAUDIT hierarchy to **Settings** > **Connection**. Click **Add Connection Profile**.



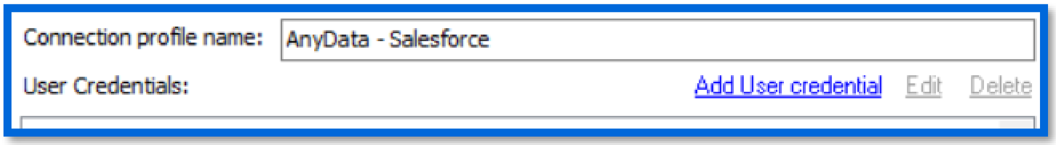
Configure the accounts used to connect to your target hosts.

Manage Connection Profiles

Select the connection profile used to contact your target hosts by selecting a connection profile below. Create a new connection profile by clicking "Add Connection profile". Switch between connection profiles by selecting a profile and then clicking "Set as default".

Connection Profiles:

Step 2 – Name the profile however you chose, for example: AnyData – Salesforce. Click **Add User Credential**.



Connection profile name: AnyData - Salesforce

User Credentials:

Step 3 – For this first credential's Account Type, select **Active Directory Account**. The User Name and Password should be for a user with the ability to authenticate to the SQL Server database used by StealthAUDIT. Click **OK** when finished.

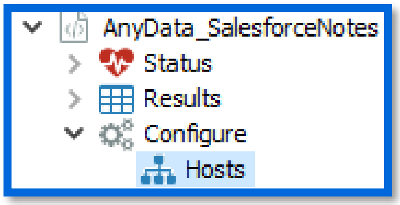
*IMPORTANT: The **Active Directory Account** needs to be the first credential in the list for this Connection Profile. If it's not, use the **Move Up** button to adjust this credential's position.*

Step 4 – Click **Add User Credential** again. For this credential's Account Type, select **StealthAUDIT Task (Local)**. The User Name is the previously recorded Consumer Key for the Salesforce Connected App. The Password is the previously recorded Consumer Secret for the Salesforce Connected App. Click **OK** when finished.

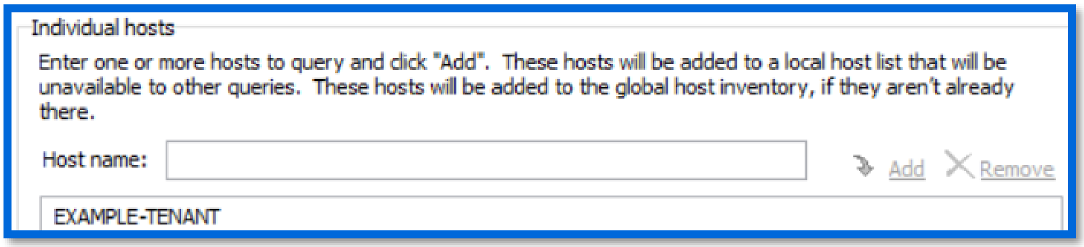
Step 5 – Click **Add User Credential** again. For this credential's Account Type, select **StealthAUDIT Task (Local)**. The User Name is a Salesforce admin login, and the Password is the admin's password. Click **OK** when finished.

Step 6 – Click **Add User Credential** again. For this credential's Account Type, select **StealthAUDIT Task (Local)**. The User Name is the URL of the target Salesforce tenant, and the Password is the Salesforce tenant's Security Key. Click **OK** when finished, then click **Save**.

Step 7 – Navigate back to the AnyData_SalesforceNotes job and go to the job's Host Selection via **[Job Name] > Configure > Hosts**.



In the Hosts menu, locate the Individual Hosts section, use the name of your Salesforce tenant for the Host Name, and click **Add** then **Save**. For example, for the tenant "example-tenant.my.salesforce", you would add "example-tenant" to the Individual Hosts list.



Individual hosts

Enter one or more hosts to query and click "Add". These hosts will be added to a local host list that will be unavailable to other queries. These hosts will be added to the global host inventory, if they aren't already there.

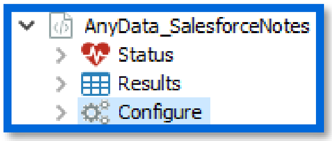
Host name:

EXAMPLE-TENANT

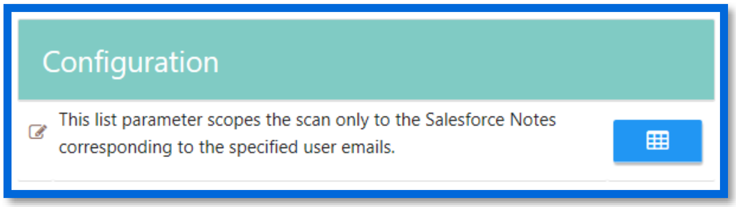
Step 8 – The following parameters can also be configured for the job:

| | |
|---|---|
| **User Email Scoping** | This list parameter scopes the scan only to the Salesforce Notes corresponding to the specified user emails |

To configure the parameters above, navigate to the job's node in the job tree.



The parameters will be displayed along with other job information and can be modified in the **Configuration** section.

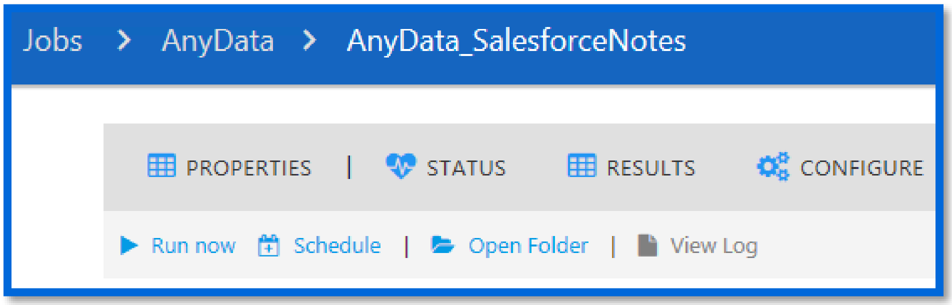


Configuration

This list parameter scopes the scan only to the Salesforce Notes corresponding to the specified user emails.

# Execution

To execute the job, highlight the AnyData_SalesforceNotes job in the StealthAUDIT job hierarchy, and click **Run Now** below the breadcrumb trail and other job configuration options.

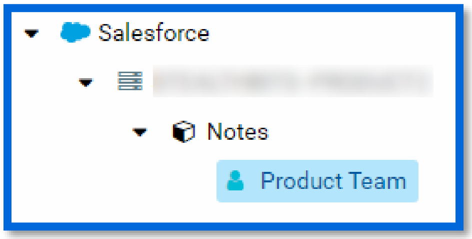

Jobs > AnyData > AnyData_SalesforceNotes
PROPERTIES | STATUS RESULTS CONFIGURE
Run now
Schedule |
Open Folder |
View Log

# View Results

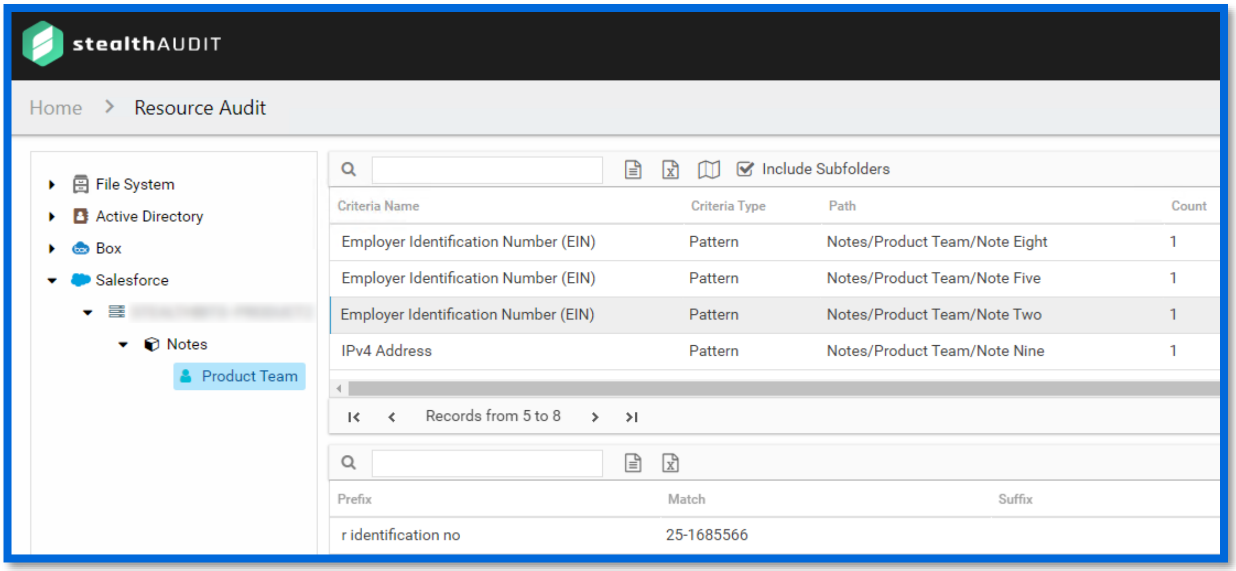
Sensitive data scan results from the AnyData_SalesforceNotes job will be output to the Access Information Center (AIC).

Step 1 – Launch the AIC by double-clicking its icon on the StealthAUDIT server's desktop or by navigating to its URL. Log-in as required.

Step 2 – Click on **Resource Audit** and navigate to Salesforce in the left sidebar. Expand the node, and nodes below it, to view details.



Information is broken down in a hierarchical view by **Salesforce** > **Tenant** > **Users > Notes**. Clicking on a scope allows you to select Sensitive Data reports in the AIC's right sidebar, which shows sensitive data found at the selected hierarchical level and below.



| Criteria Name | Criteria Type | Path | Count |
|---|---|---|---|
| Employer Identification Number (EIN) | Pattern | Notes/Product Team/Note Eight | 1 |
| Employer Identification Number (EIN) | Pattern | Notes/Product Team/Note Five | 1 |
| Employer Identification Number (EIN) | Pattern | Notes/Product Team/Note Two | 1 |
| IPv4 Address | Pattern | Notes/Product Team/Note Nine | 1 |

Records from 5 to 8

| Prefix | Match | Suffix |
|---|---|---|
| r identification no | 25-1685566 | |

*IMPORTANT: Salesforce supports full version history for Notes. Salesforce stores each version in full, separate Notes, which this AnyData job can individually scan. As a result, Note names are post-fixed by the Note version number as well as a date/timestamp in the AIC.*