amersecurityarchitects

salesforce

# Trusted Agentics

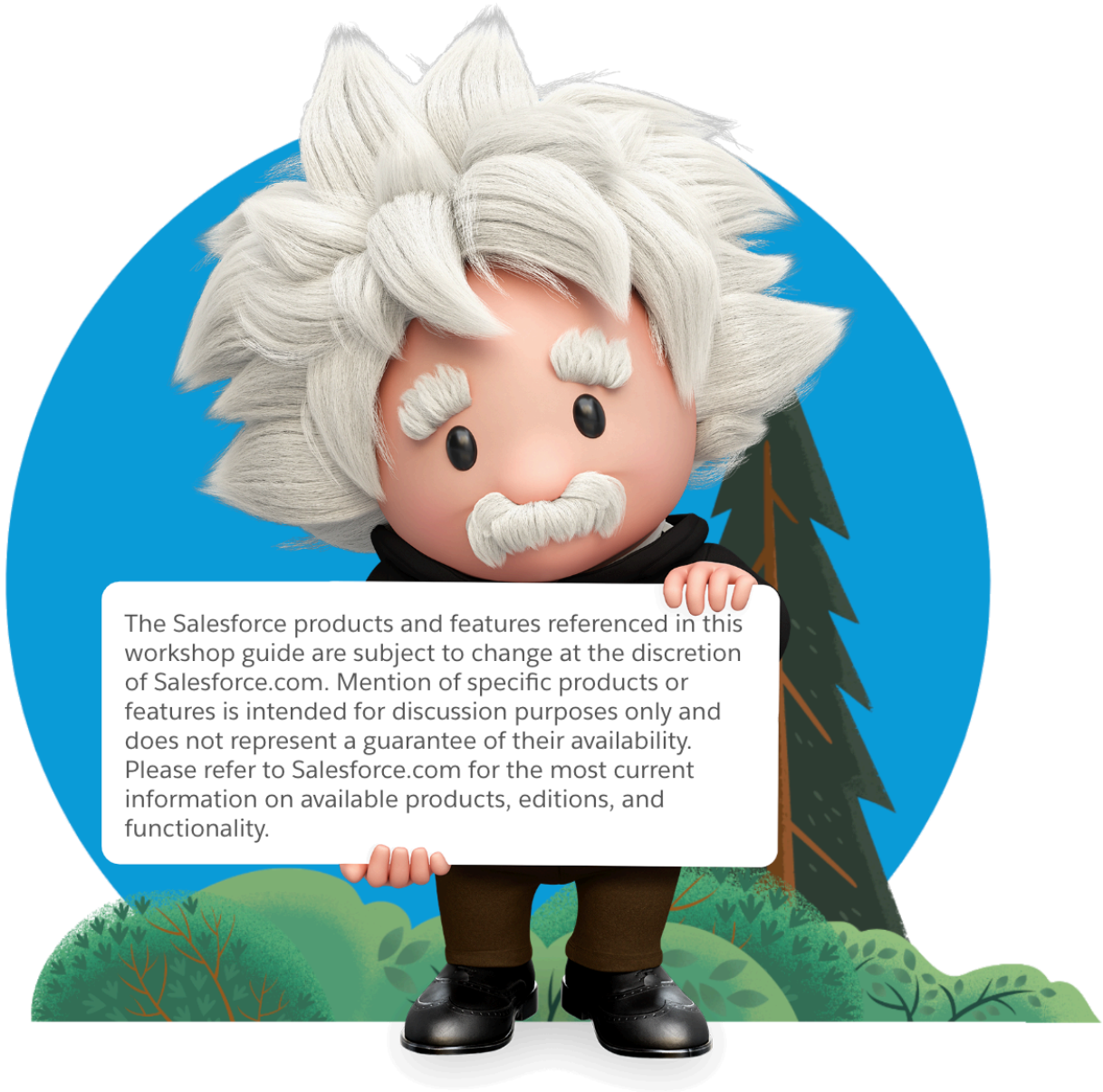
# Hands-On Workshop

## Close the Trust Gap with the Einstein Trust Layer and Salesforce Trusted Services

## Attendee Guide

ECS - January 7, 2026

# Disclaimer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# Table of Contents

# Scenario

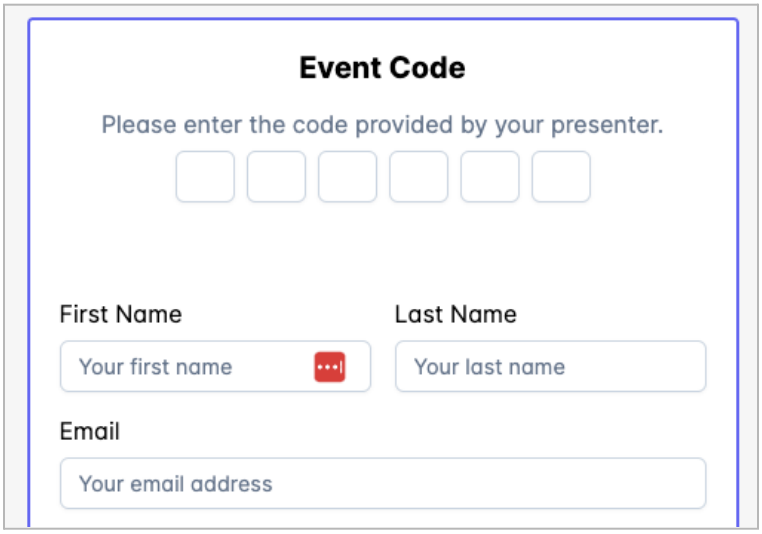
Your organization is looking at incorporating Agents and generative AI functions in order to improve customer service. Your Chief Information Security Officer (CISO) has asked you to ensure that you are using generative AI in a secure and compliant manner.

To innovate while enhancing trust you will leverage several important salesforce capabilities:

- Configure the Einstein Trust Layer for data masking and feedback
- Understand permissions needed for agent actions
- Create a data management policy for data minimization
- Configure a policy to reduce the risk of data exfiltration
- Enable encryption for sensitive fields
- Enable change history tracking on contact records

## Get your workshop Salesforce org: https://sfdc.co/getmyorg

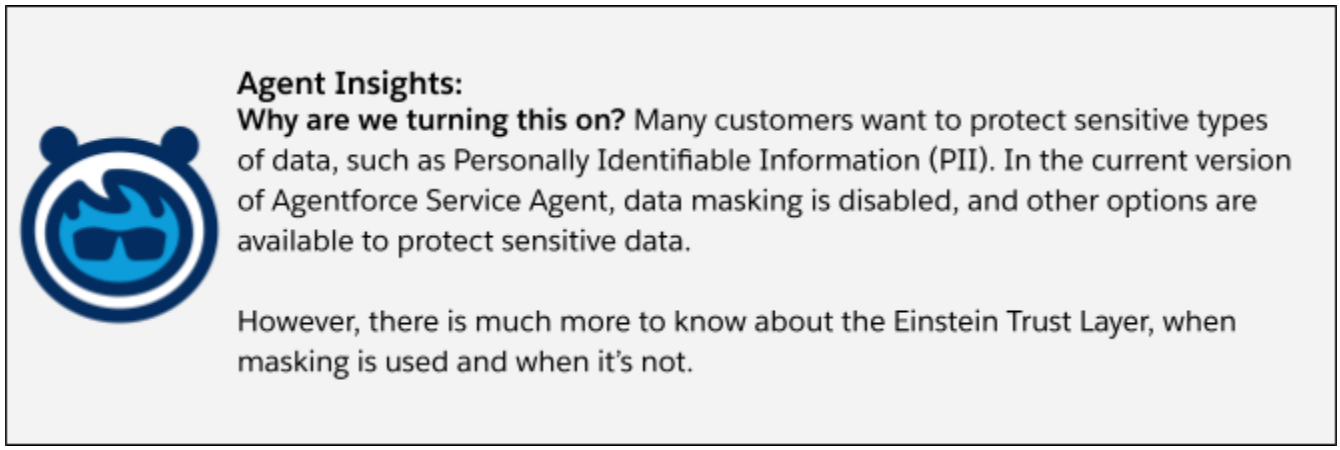
**Your workshop facilitator will provide you with an Event Code for signup.**



# Exercise 1: Trust Layer Data Masking and Einstein Feedback

- **What to do:** Verify the configuration of the Einstein Trust Layer
- **Value of it:** Understanding of how the Trust Layer is set up and the various configurations for Data Masking
- **Tools used:** Einstein Trust Layer Setup
- **Time to Complete:** 15 minutes

- Click the **Setup** icon (it is in the upper right-corner of the browser window) and select **Setup**
- In the Setup quick find box, type **Einstein Setup**, then select **Einstein Setup**
  - Switch **"Turn on Einstein"** from **Off** to **On**
- Refresh your browser page
- In the Setup quick find box, type **Agentforce**, and click **Agentforce Agents**.
  - Switch "**Agentforce**" to **On**
  - Switch "**Enable the Agenforce (Default) Agent**" to **On**
- In the Setup quick find box, type **Trust Layer**, and click **Einstein Trust Layer**
  - If the "**Large Language Model Data Masking**" is **Off**, switch it to **On**




- Scroll down to review the types of data that are selected for masking by default

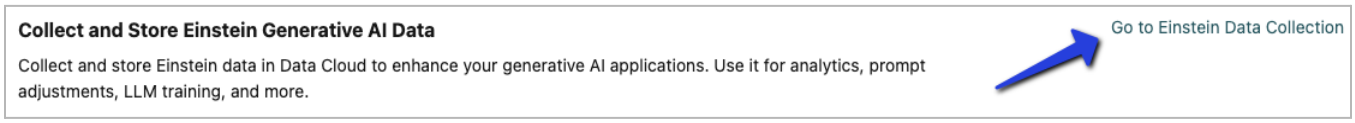
**Agent Insights:**
Notice that the **Name** attribute is selected to be Masked. That means a person's first, middle, or last name, or a combination of these will be turned into a string like <PERSON_0> for a variable we use in a prompt, such as *User.FirstName*. That's an example of data masking happening before the prompt is sent through the LLM Gateway, which is part of the Einstein Trust Layer.

As it comes back through the Einstein Trust Layer it will return to its original format, as the CRM data point: *User.FirstName*. However, this is using Pattern Based masking, which isn't as accurate as Field Based masking, based on Compliance Categories and Data Sensitivity levels. Data Sensitivity Levels are metadata attributes applied to fields and can be configured to indicate the sensitivity of data. Compliance Categories are also metadata attributes applied to fields focused on a compliance act, regulation or definition. If you configured fields with these settings, they can also be masked when used in Prompts.

You will also see an option to mask Shield Platform Encrypted Fields. This will allow you to mask fields that have already been encrypted using Platform Encryption. This ensures that fields already considered sensitive will be masked if they are used in prompts.

It will be normal for customers to want to analyze what is happening with their prompts and the data going to and from the LLMs. This can be done with the data collected with Agent Analytics for topic usage, action usage, key metrics such as deflection, token count, and more. It can all be very useful for compliance purposes.

- In the Quick Find box, type **Einstein Setup**, and then select **Einstein Setup**
- Scroll down to **Collect and Store Einstein Generative AI Data**
- Click **Go to Einstein Data Collection**




- Ensure that the following are set to **On:**
  - **Audit and Feedback**
  - **Agent Analytics**

  By doing the above steps, you will eventually get two dashboards that are ready for you to review if you **navigate to Dashboards from the App Launcher**, then select **All Dashboards**. These dashboards will take some time to populate as the data comes from actively using the agent.

Look for the dashboards named:

**Einstein Generative AI Audit & Feedback Data**
**Einstein Trust Layer**

Once those dashboards are created and the underlying reports are populated, you can see the data that's in Data Cloud that you'll eventually have reports built from.

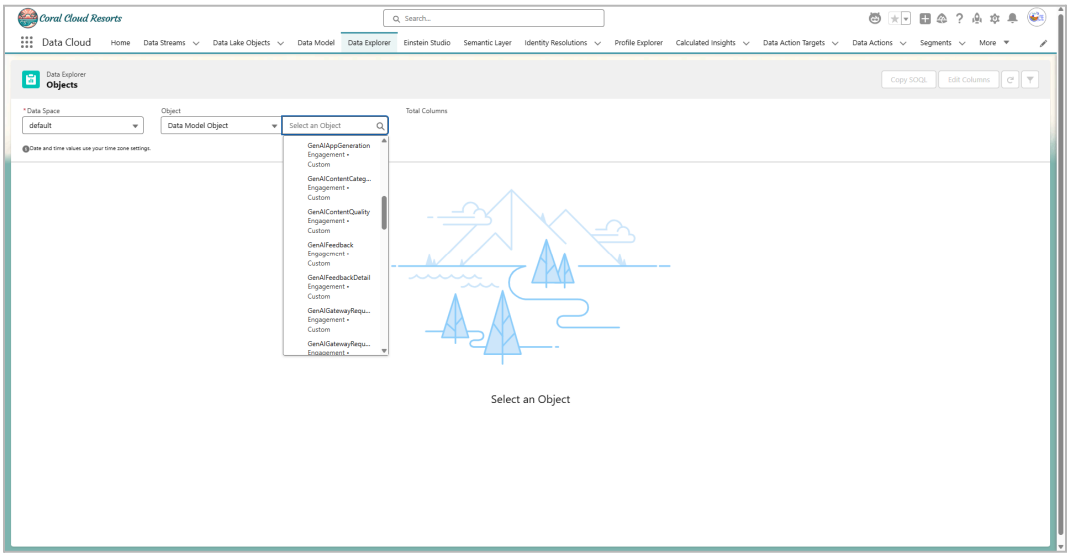
Follow these steps to see that data:

- Click the **App Launcher** and select **Data Cloud**
- Click the **Data Model** tab
- You now have a number of objects that start with **GenAI**

🔵**Note:** If you don't see them, click the small refresh button on the right-hand side of the toolbar (not your browser's refresh button).

You can use Data Explorer to browse the Data Model objects that start with **GenAI**

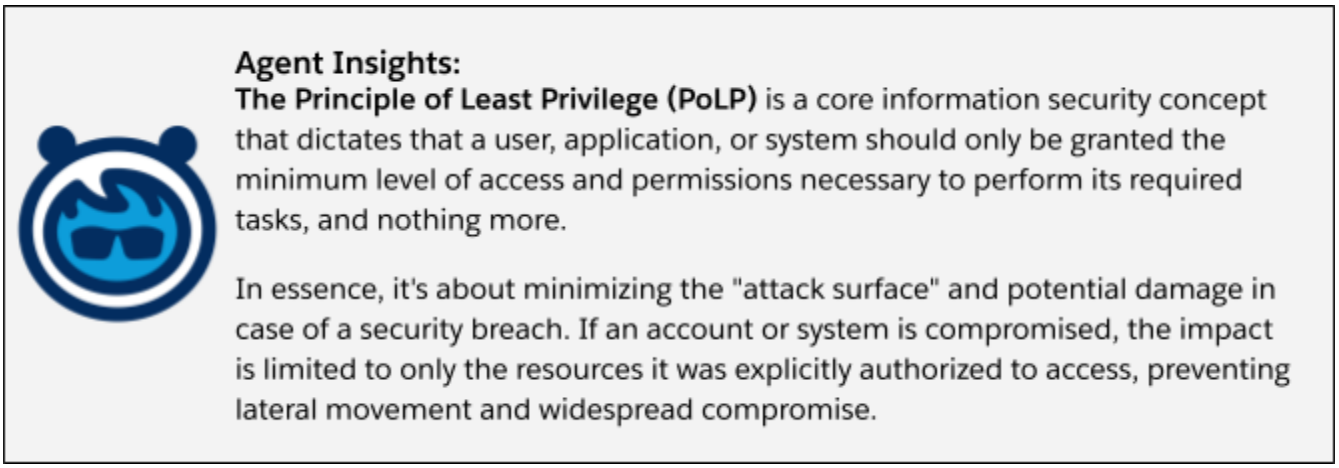
- Click the **Data Explorer** tab
- Select *default* for **Data Space,** for *Object* select **Data Model Object**
  Select any one of the objects that start with **GenAI** to view the columns in the object



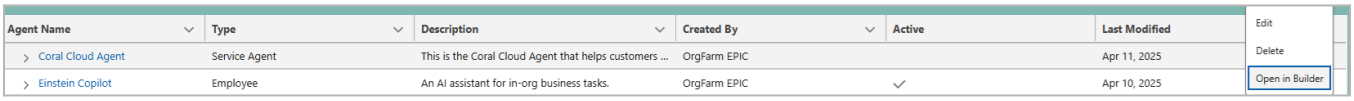

🔵**Note:** These are the objects that contain the data for the user feedback, audit data, and prompt usage that you just turned on. These objects will be populated with data after your agents and prompt templates have been used.

# Exercise 2: Agent Permissions

- **What to do:** Verify that the Agent is returning the correct results and has proper permissions. You will identify the user that executes the Agent and verify it has the correct permissions.
- **Value of it:** Understanding what the Agent has permissions for will help with Least Privilege.
- **Tools used:** Who Sees What Explorer
- **Time to Complete:** 15 minutes

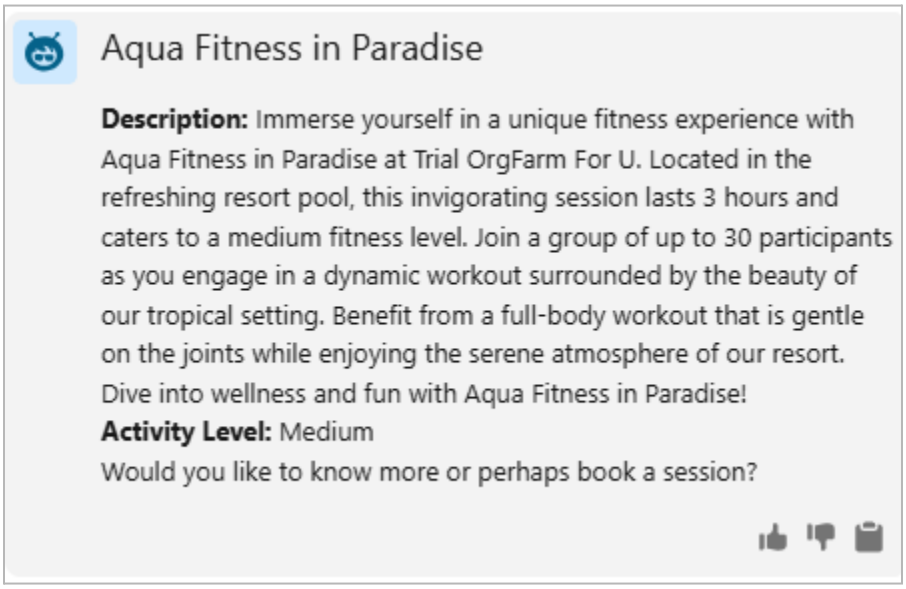



- In the Setup quick find box, type **Agent** and select **Agentforce Agents**
- Click the dropdown arrow on the **Coral Cloud Agent** and select **Open in Builder**



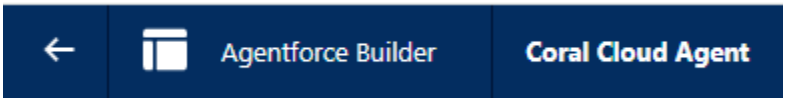

- If needed, click the 'Got It' button in the Conversation Preview


- Enter the following prompt to get us started:
  **I am sofiarodriguez@example.com and my membership number is 10008155**
- After it responds, enter the next prompt:
  **Tell me about the Aqua Fitness in Paradise experience**
- While the response does discuss the experience, it would be a better user experience for the user if the price was listed as well

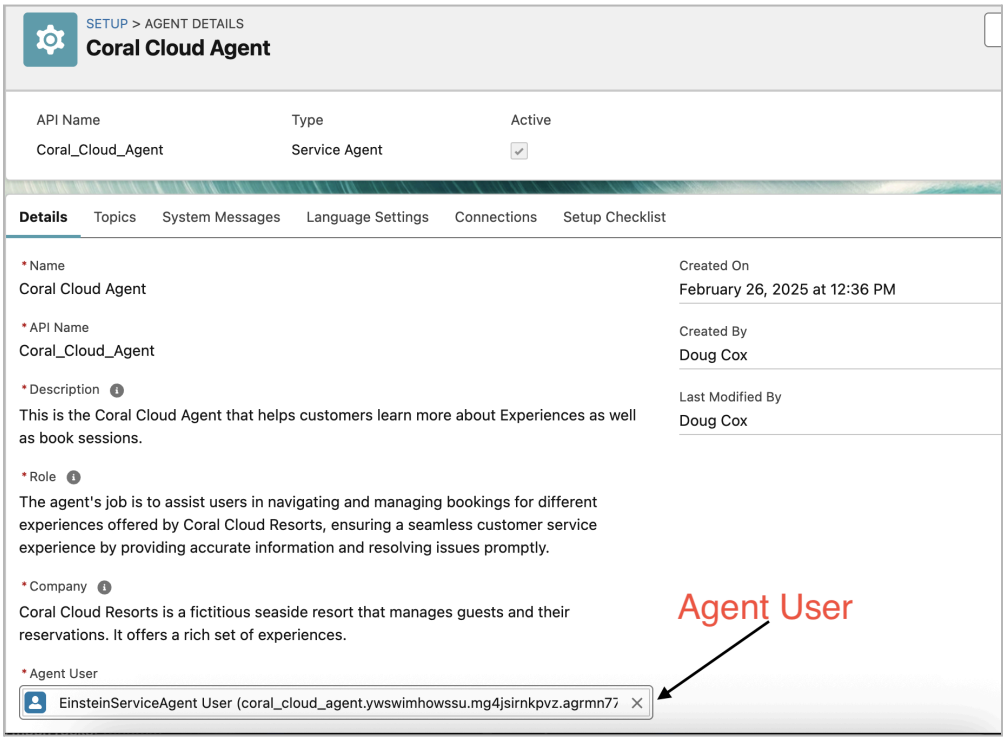



Lets make sure the coral cloud agent user has access to the proper field to get the price for the experience. We will use the “Who Sees What” explorer in the Security Center Extension to determine what permissions the **EinsteinServiceAgent User** has. We know this user is assigned the **Coral Cloud Service Agent Permissions** Permission Set, so we will search to make sure that the proper permissions have been assigned on the Experience object, which includes the Price field.

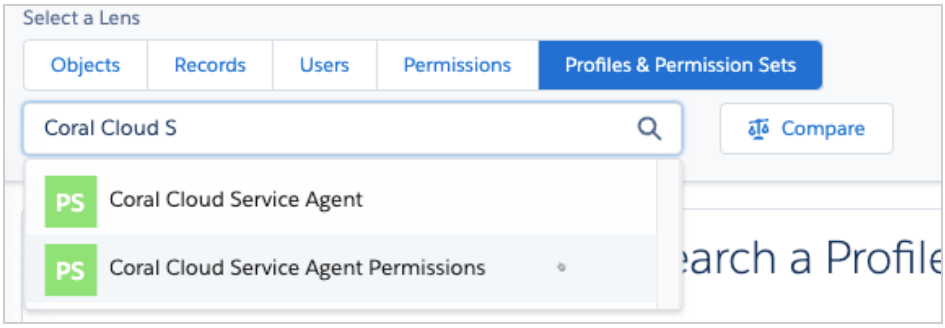
- Close out of Agentforce Builder by clicking the back arrow



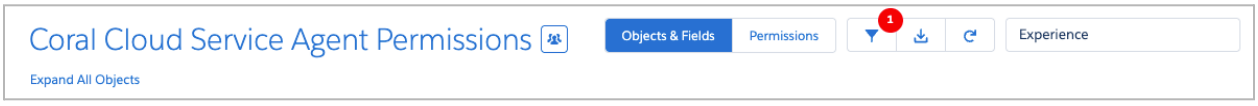

- Click on **Coral Cloud Agent**
- On the bottom of this page the User assigned to this agent is displayed
  The Coral Cloud Agent user’s name is **EinsteinServiceAgent User**



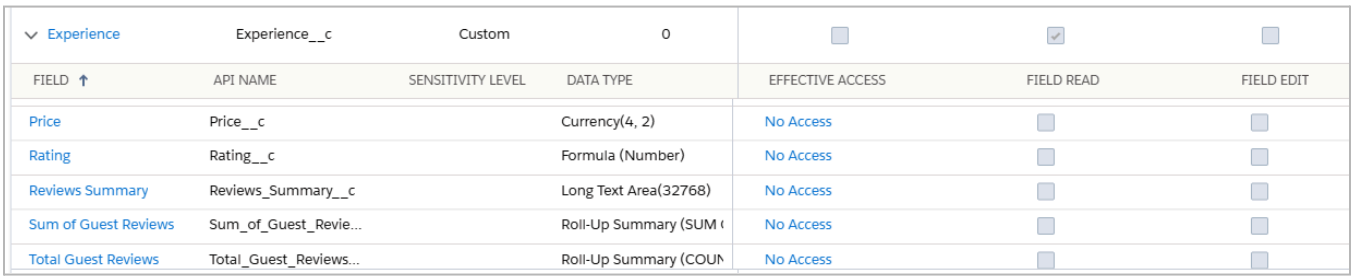

- Click the **App Launcher** icon and search for "**Security**"
- Open the **Security Center Extension** App and select **Who Sees What Explorer** (It might take minute to load since this is the first time it is starting up)
- Click "**Profiles and Permission Sets**"
- Search for "**Coral Cloud Service Agent Permissions**"



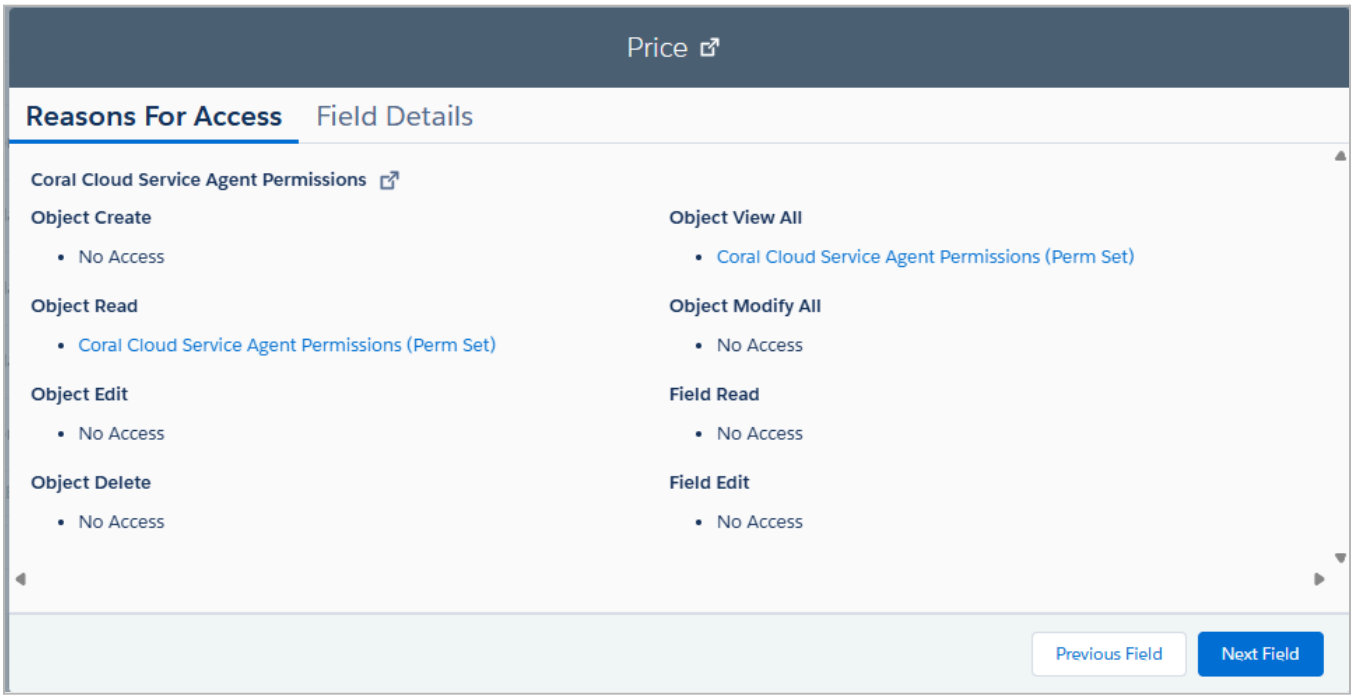

- In the **"Search Objects & Fields"** box, type "**Experience**"



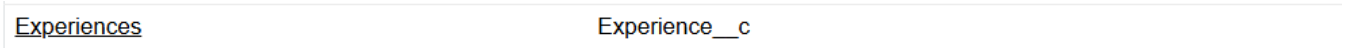

- Expand the **Experience** object and scroll down to the **Price** field.
  You will see that the Effective Access is "No Access"




- Click on the "**No Access"** link on the Price field. This screen will provide more information on the Reason for Access and the Field Details
- Click the "**Coral Cloud Service Agent Permissions (Perm Set)"** link. This will open up the permission set so that you can edit the permissions



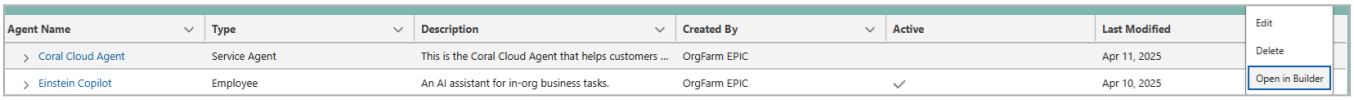

- In the **Apps** section, click **Object Settings**
- In the Find Settings... box, search for **Experience**
- Select **Experiences** from the list




- Click **Edit**
- Scroll down to the Field Permissions and select the **Read Access check box** for the Price field:


- Click **Save**

- Now, let's go back and test the agent again. In the Setup quick find box, type **Agent** and select **Agentforce Agents**
- Click the dropdown arrow on the **Coral Cloud Agent** and select **Open in Builder**




- Select the refresh icon at the top of the Conversation Preview


- Enter the following prompt to get us started:
  **I am sofiarodriguez@example.com and my membership number is 10008155**

- After it responds, enter the next prompt:
  **Tell me about the Aqua Fitness in Paradise experience**
- Now you will see the price in the response

# Exercise 3: Shield Event Monitoring

Salesforce Shield **Transaction Security** is a feature that provides advanced security and risk monitoring capabilities for critical business processes and data within the Salesforce platform. It is one of the advanced features found in the Shield Event Monitoring solution. It helps organizations detect and prevent potential threats, fraud, and policy violations by analyzing and evaluating user actions and transactions in real-time.

Transaction Security allows administrators to define transaction policies that specify the criteria for identifying potentially risky or anomalous activities. These policies can be based on various factors, such as user profiles, IP addresses, geographic locations, time of day, or specific data patterns.

When a user performs an action that violates a defined policy, Transaction Security can take appropriate actions, such as blocking the transaction, requiring additional verification steps, or generating alerts and notifications to administrators or security teams.

By continuously monitoring and evaluating transactions, Transaction Security helps organizations maintain the integrity of their Salesforce data and processes. It provides a detailed audit trail of user activities, enabling organizations to investigate and respond to potential security incidents effectively.

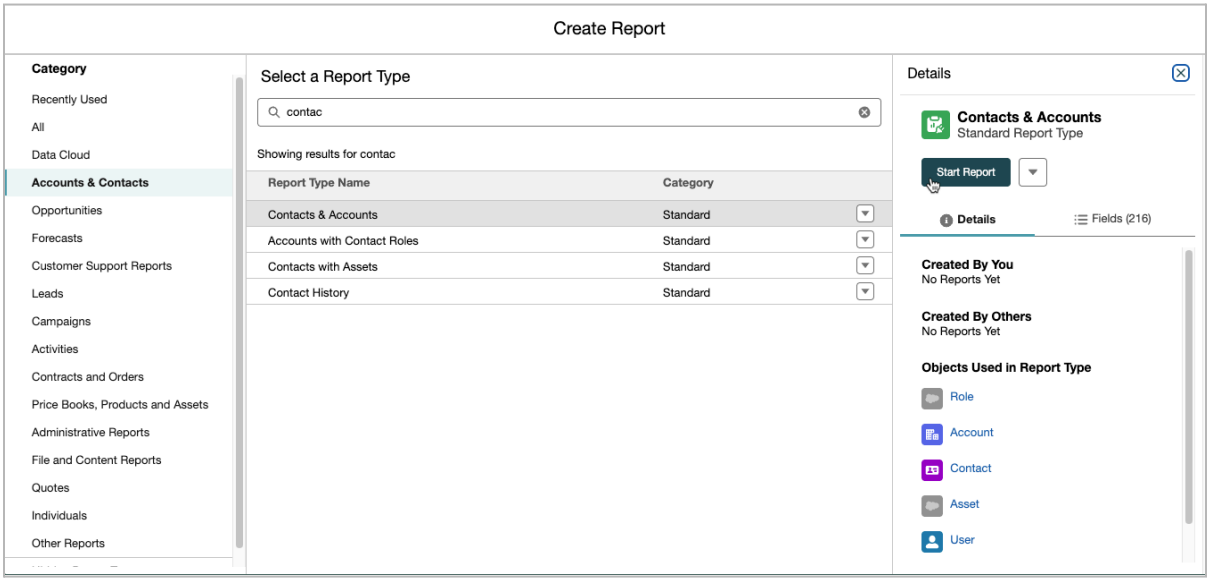
**Objective:**

- Set up a policy to prohibit downloads of sensitive data from Data Cloud

**Estimated Time:** 7 minutes

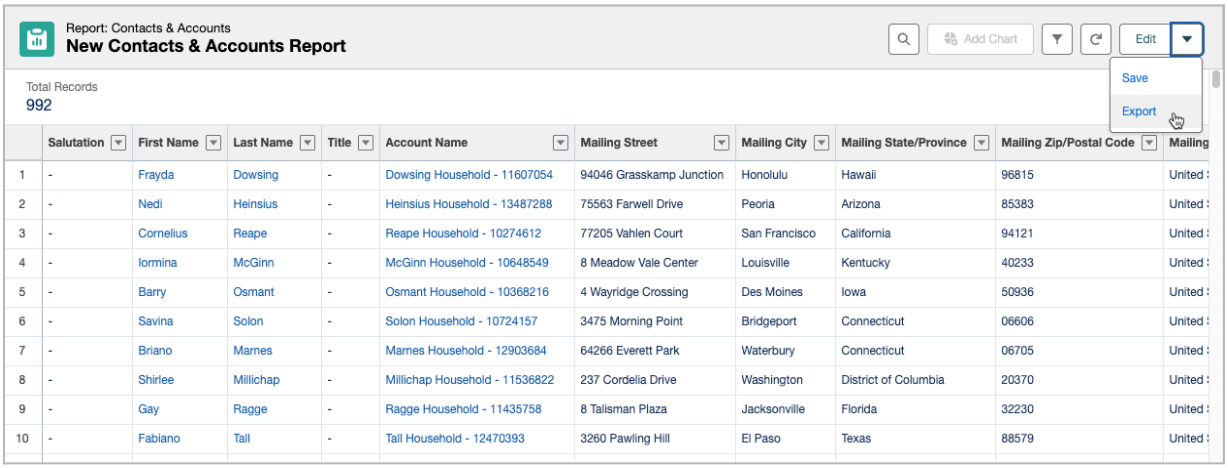
**Instructions:**

- See How Users can Download Sensitive Data
  - Use the App Launcher to navigate to Reports
  - Click the **New Report** button
  - Select the **Accounts & Contacts** Category
  - Select the **Contacts & Accounts** Report Type
  - Click **Start Report**




- Click the **Filters** tab and change the **Created Date** filter to a date in 2024 and click **Apply**
- Enable **Update Preview Automatically** to view your changes
- Click **Save & Run**, accept the defaults and click **Save**

Note that this report includes almost 1000 rows of sensitive data like names, street addresses, phone numbers, and email addresses, which are considered personally identifiable information (PII) and protected by data privacy laws, including GDPR and CCPA.



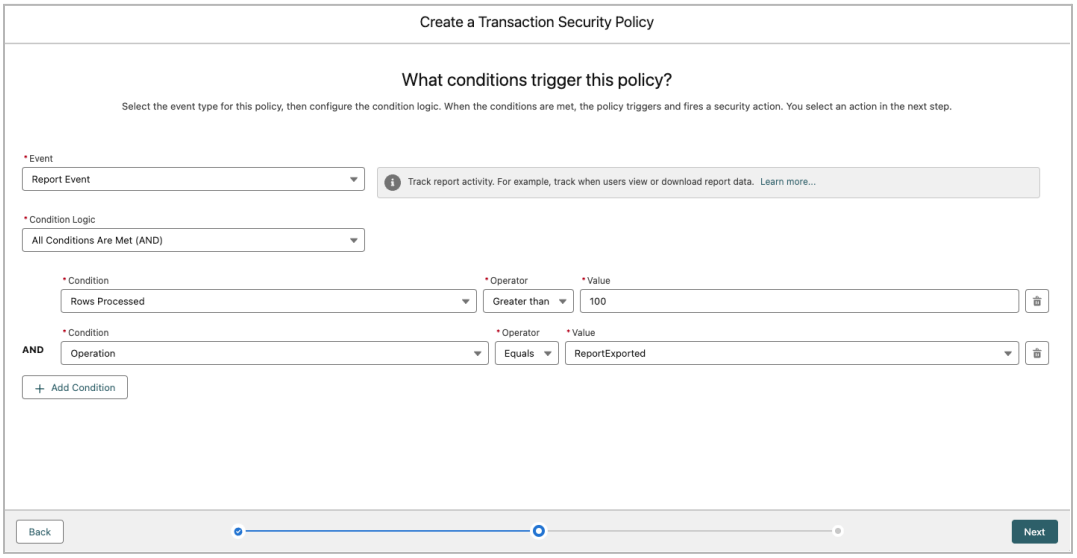

- In the top-right corner, select the down arrow next to **Edit** and select **Export**
- Select **Details Only** and click **Export** 

- Click **Cancel**. You've validated a user could export the report data by getting to the Save dialog

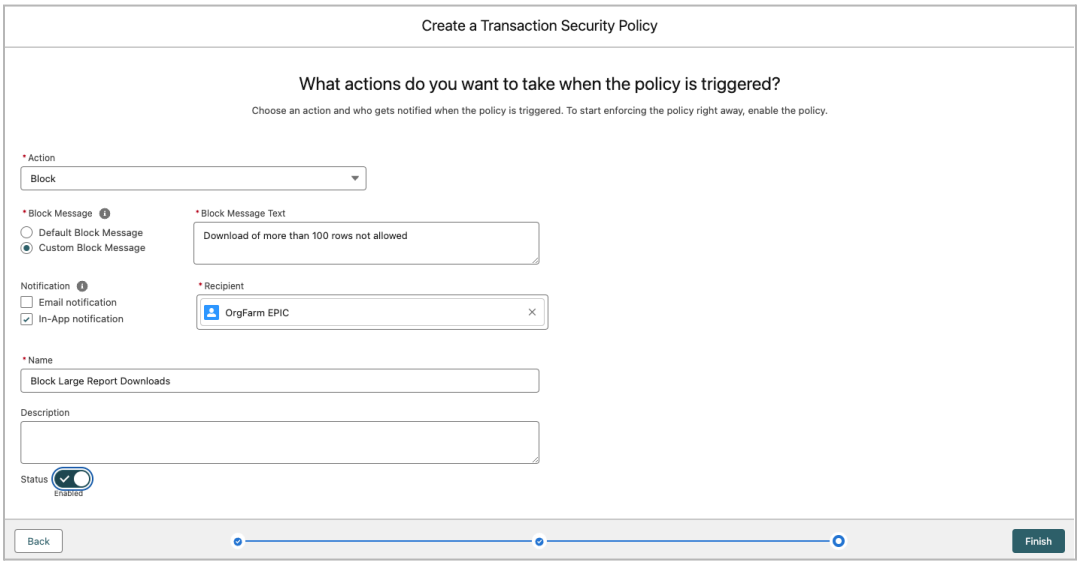
- Create a **Transaction Security Policy** to Block Downloads of Sensitive Data

- Use the App Launcher to Navigate to the Shield app. Enter **Shield** in the search box
- Select the **Event Monitoring** tab
- Click **Transaction Security Policies** in the left navigation pane
- Click the **Enable** button
- Click the **New** button
- Click **Condition Builder** and click **Next**
- On the Create a Transaction Security Policy page, set the following values:
    - Event: **Report Event**
    - Condition Logic: **All Conditions Are Met (AND)**
    - Condition: **Rows Processed**
    - Operator: **Greater than**
    - Value: **100**
    - Click **+Add Condition** 

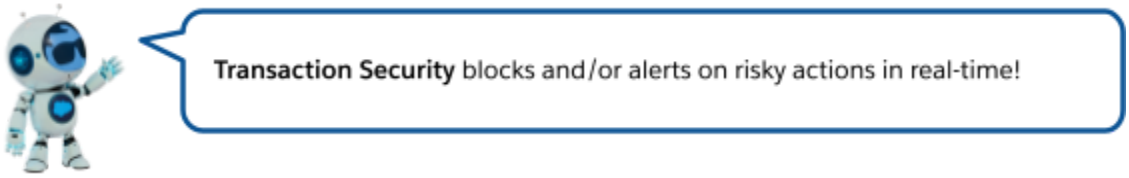
    - Condition: **Operation**
    - Operator: **Equals**
    - Value: **ReportExported**




- Click **Next**
- Set the following values:
    - Action: **Block**
    - Custom Block Message: **Download of more than 100 rows not allowed** (feel free to customize this message text)
    - In-App notification: **Checked**
    - Recipient: **OrgFarm EPIC (your User)**
    - Name: **Block large report downloads**
    - Status: click to **Enabled**




- Click **Finish**
- Return to the **Contacts & Accounts report**
- Attempt the download again: click the down arrow next to **Edit** and select **Export**
- You should see a message that the download of large amounts of data is not allowed and the action has been blocked



# Exercise 4: Shield Field Audit Trail

Salesforce Shield Field Audit Trail is a compliance and governance tool that allows organizations to track the state and value of their data over time. It provides a comprehensive, long-term forensic trail of field-level changes, enabling businesses to satisfy strict regulatory requirements and internal auditing standards.

With Field Audit Trail, administrators can define data retention policies and specify which fields should be tracked for audit purposes across standard and custom objects. This includes the ability to monitor up to 60 fields per object–triple the capacity of standard field history tracking–extending the reach of compliance monitoring to a wider range of business-critical data.

Field Audit Trail provides a verifiable "proof of state" for any record at any point in time. It integrates seamlessly with Salesforce's metadata API, allowing developers and admins to manage retention policies programmatically or through tooling.

**Objectives:**

- Enable Field Audit Trail
- Track changes on the Contact object's First Name, Last Name and Email fields
- Add the field history component to the Contact Record Page
- Create a report showing all Contact record changes

**Estimated Time:** 10 minutes

**Instructions:**
In our use case we have determined that our organization needs to track changes to the contact records in our Salesforce org.  Changes to the First Name, Last Name and Email fields of contact records need to be tracked, including when the change was made, who made the change and what the prior value was before the change.

First we'll enable **History Tracking** (Field Audit Trail) in **Setup**, then you add a component to the Contact record Page Layout.  Then, you'll edit a contact record to ensure Field Audit Trail is functioning as expected.  Finally, you'll create a report to view all contact Field Audit Trail tracked changes.

Start by enabling History Tracking on the Contact object and desired fields.

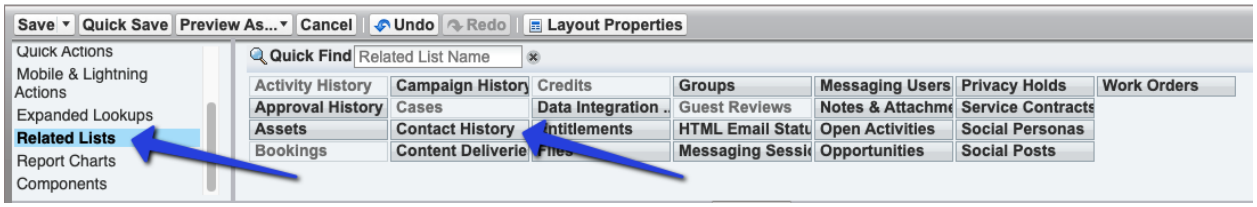
- Click the **Setup** icon  (it is in the upper right-corner of the browser window) and select **Setup**
- Click the **Object Manager** tab
- Enter **Contact** in the Quick Find
- Click **Contact** in the results to open the Contact object
- Click **Fields & Relationships** in the **Details** panel

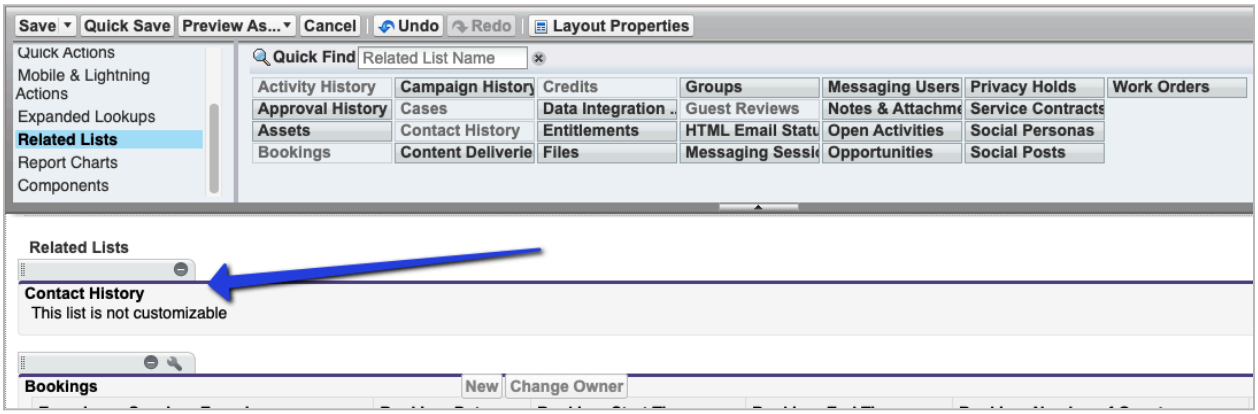
- Click **Set History Tracking** on the top right of the page


- Click **Enable Contact History** to enable it
- Click **Email** and **Name** ensuring you have a check in each box
- Click **Save**

You'll now add the History component to the Page Layout

- Click **Page Layouts** in the **Details** panel
- Click the **Contact Layout**
- On the Contact Layout page scroll down in the list and click **Related Lists**
- Click and Drag **Contact History** to the top of the **Related Lists** section, above **Bookings**



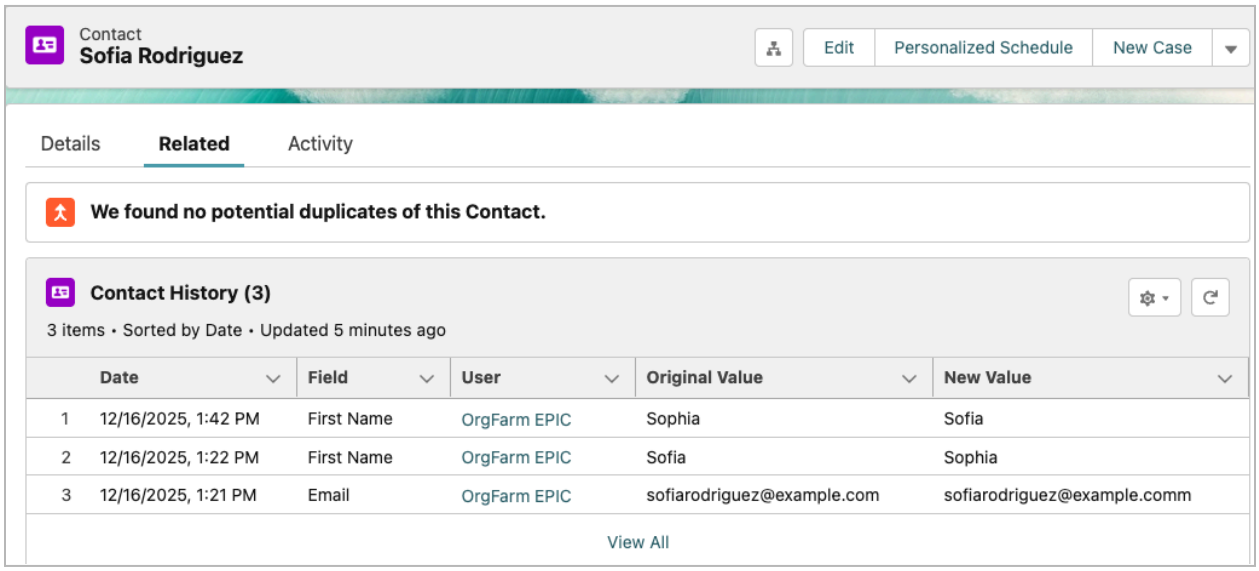

- Click **Save**
- Click **Yes** if prompted to **Overwrite Users' Related List Customizations**

You'll now verify Field Audit Trail is working correctly

- Click the **App Launcher** and select **Sales**
- In the **Search** bar, type "**Sofia**" and click the contact record for **Sofia Rodriguez**


- Click the **Related** tab

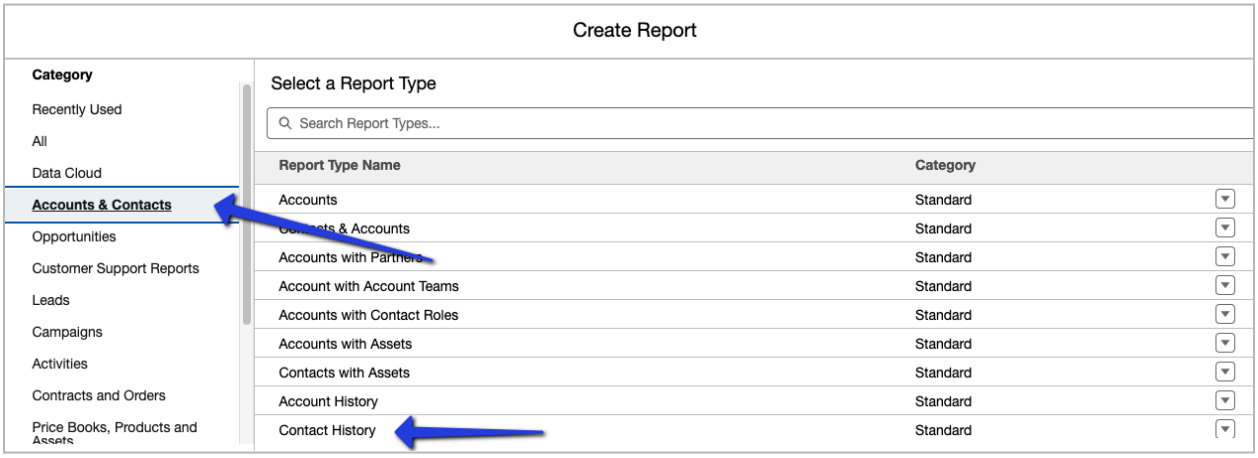
- Notice the **Contact History (0)** list is displayed, this will display the tracked changes
- Click the **Edit** button on the top of the record
- Change Sofia's email address to whatever you'd like
- Change Sofia's name, for example Sophia
- Click **Save**
- The page will update and the **Contact History** list will show your changes including Date, Field Changed, User Name, and the Original and New Values



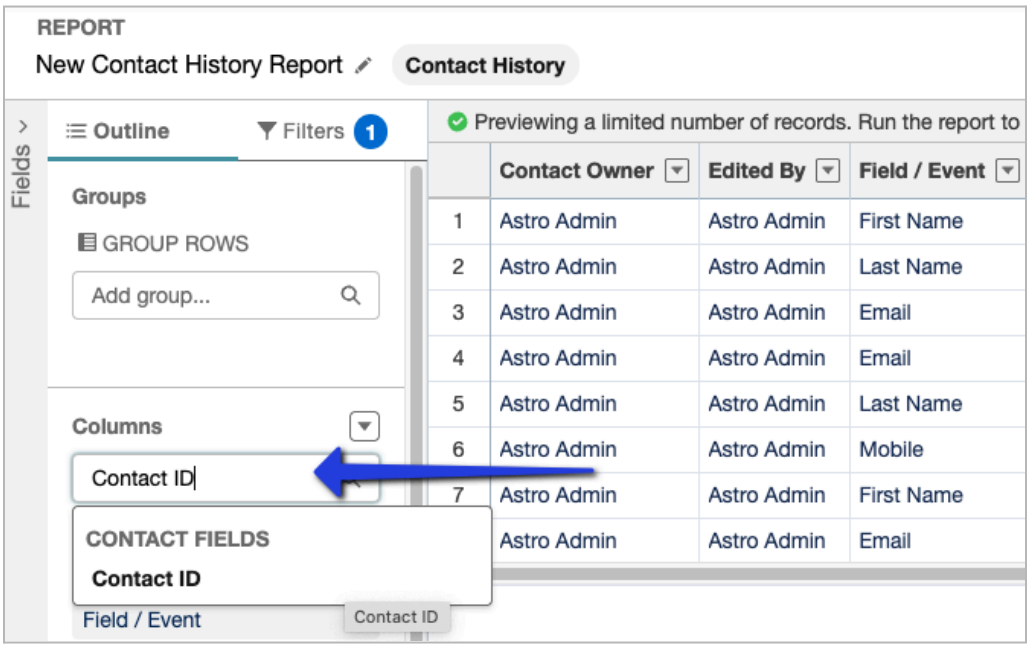

Now you'll create a Contact History Report to easily view changes

- Click the **Reports** tab
- Click **New Report**

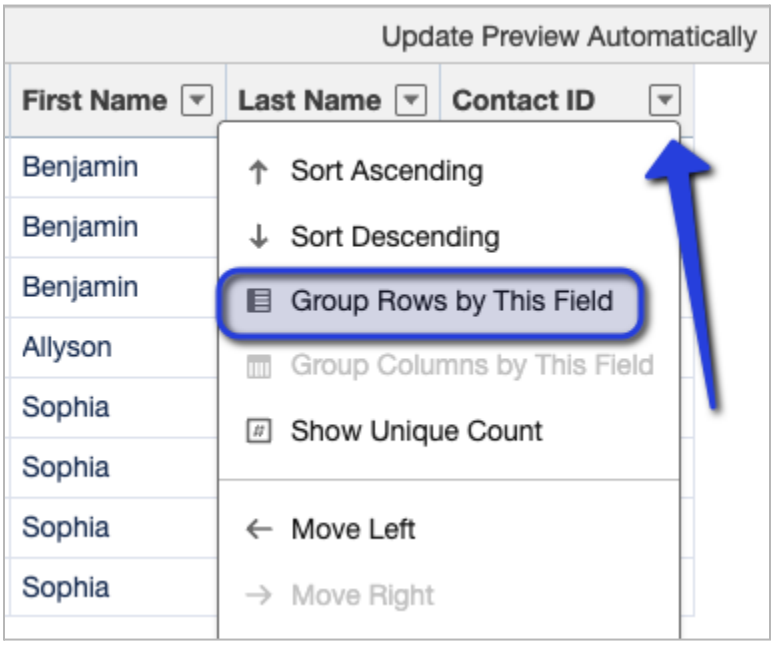

- Click **Accounts & Contacts** in the **Category** list
- Click **Contact History** in the report type list




- Click **Start Report**
- In the report editor enter **Contact ID** in the **Columns** search box




- Click the down arrow on **Contact ID**
- Select **Group Rows by This Field**




- Click **Save & Run**
- Accept defaults and click **Save**

# Exercise 5: Shield Platform Encryption

Salesforce Shield Platform Encryption is a data protection tool that allows organizations to encrypt sensitive data at rest within their Salesforce org and Data Cloud. It provides an additional layer of security by rendering data unintelligible to anyone or any system that does not have the appropriate decryption keys.

With Shield Platform Encryption, administrators can define encryption policies and specify which fields, files, and attachments should be encrypted in their Salesforce org. This includes standard and custom fields, Communities, and other Salesforce features.

The encryption process is seamless and transparent to users, as Salesforce automatically encrypts and decrypts data as it moves in and out of the platform. Encrypted data remains protected even in backups, exports, and other data operations.

Platform Encryption uses industry-standard AES-256 bit encryption and supports various key management options, including tenant secrets, customer-supplied keys, and key management services like AWS KMS or Azure Key Vault.

**Objectives:**

- Generate a Tenant Secret
- Enable Encryption Key Management for Data Cloud
- Enable Encryption for Files and Attachments
- Enable Encryption for Sensitive Fields

**Estimated Time:** 10 minutes

**Instructions:**
In our use case we have determined that our users are inputting sensitive data in a few fields that are associated with cases. In order to protect that sensitive data we are going to encrypt those fields using Platform Encryption.

First we are going to use the **Platform Encryption Analyzer** as part of the **Shield Extension** to verify that we will have no issues with field level encryption for the fields we intend to encrypt.

- Click the **App Launcher** in the upper right hand corner and search for "**Shield Extension**"
- Click on the **Platform Encryption Analyzer**
- After the **Platform Encryption Analyzer** opens, **refresh** your web browser.
- Search for "**Case**" in the **Objects** filter

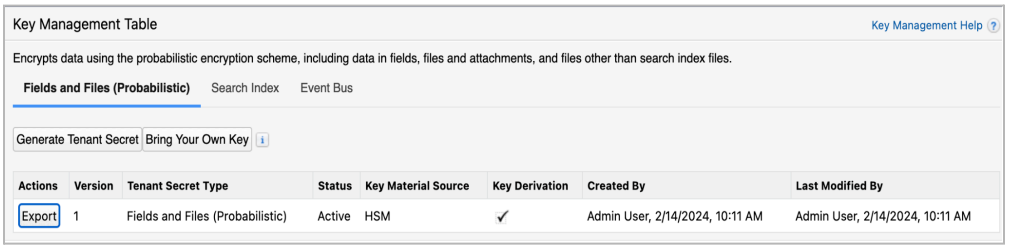
- Select the **Case** object
- In the **Case Fields** list, select **Description** and **Subject**
- In the **Objects** filter select **Case Comment**
- In the **Case Comment Fields** list select **Body** and **Rich-Text Body**
- Click the **Analyze** button in the upper right corner

You will now see the Analysis job progress. It will take a few minutes for it to complete.

- When analysis is complete
  Click **Exit Job Progress**
- The 4 fields we have selected are clear for encryption. You can see the results by selecting the **Case** and **Case Comment** objects and verifying the green checkbox in the results column.

Now we are going to enable Platform Encryption and encrypt those fields as well as encrypt our Data Cloud instance.

- Use the App Launcher to navigate to the **Shield app**
- Select the **Platform Encryption** tab
- Select **Key Management** in the left navigation bar
- Click **Generate Tenant Secret** 


- In the Setup Quick Find box, Search for “**Encryption**”
- Click **Encryption Settings**
- In the **Encryption Policy** section turn on following settings:
  - Manage Data Cloud Keys
  - Encrypt Files and Attachments
- Scroll down to “**Advanced Encryption Settings”** and turn on the following settings
  - **Restrict Access to Encryption Policy Settings**
  - Encrypt Standard Fields → Click **Select Fields** 

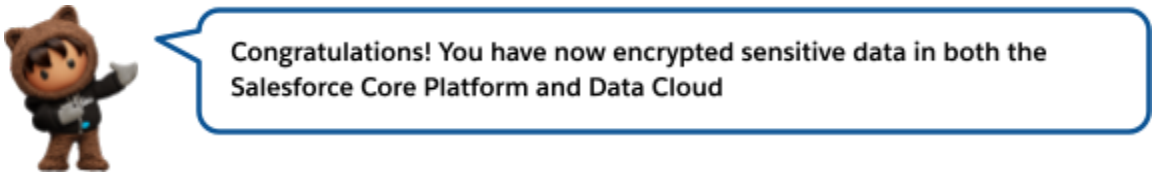
  - On the next screen - Click **Edit** 

  - Scroll down to **Case** and select the “**Subject**” and “**Description**” fields
  - On **Case Comment** select the **Body** and **Rich-Text Body** fields
  - You should have the following fields checked:


- Click **Save** 

- Go back to the **Key Management** settings
- You will now see two sections for Key Management, one for Salesforce Platform and one for Data Cloud


- Select the **Data Cloud Tab**
- Salesforce generates a root key for you. This triggers the encryption of all previously ingested data in Data Cloud.



# Exercise 6: Privacy Center

Salesforce Privacy Center is a centralized hub that helps organizations manage and maintain compliance with various data privacy regulations, such as the General Data Protection Regulation (GDPR) and the California Consumer Privacy Act (CCPA). It provides a single point of control for managing data privacy requests, consent tracking, and preference management within the Salesforce ecosystem. This also ensures that data being used for Agentforce is up to date to ensure agent accuracy.

With Privacy Center, organizations can streamline the process of handling data subject requests, such as requests for access, deletion, or rectification of personal data. Users can submit requests through a self-service portal, and administrators can manage and track the fulfillment of these requests from within Privacy Center.

Privacy Center also enables organizations to capture and manage individual consent preferences, ensuring that personal data is processed and used in accordance with the consent provided by individuals. This includes tracking consent for marketing communications, data sharing, and other relevant activities.

Additionally, Privacy Center complements other Salesforce features, such as Salesforce Shield and Data Detect, to provide a comprehensive data governance and compliance solution. It supports audit trails, encryption, and data masking, further enhancing data privacy and security within the Salesforce platform.

- **What to do:** You will create a case Data Management policy to delete old cases in order to ensure accuracy of data used in Generative AI workloads
- **Value of it:** Understand how to configure data management policies
- **Tools used:** Privacy Center
- **Time to Complete:** 15 minutes

**Instructions:**

- Create a Data Management Policy to delete any Case Comment records associated with cases that have been closed for more than three years
  - Use the **App Launcher** to navigate to the **Privacy Center** app
  - Click the link **Go to Data Management Policies**
  - Click **New** 

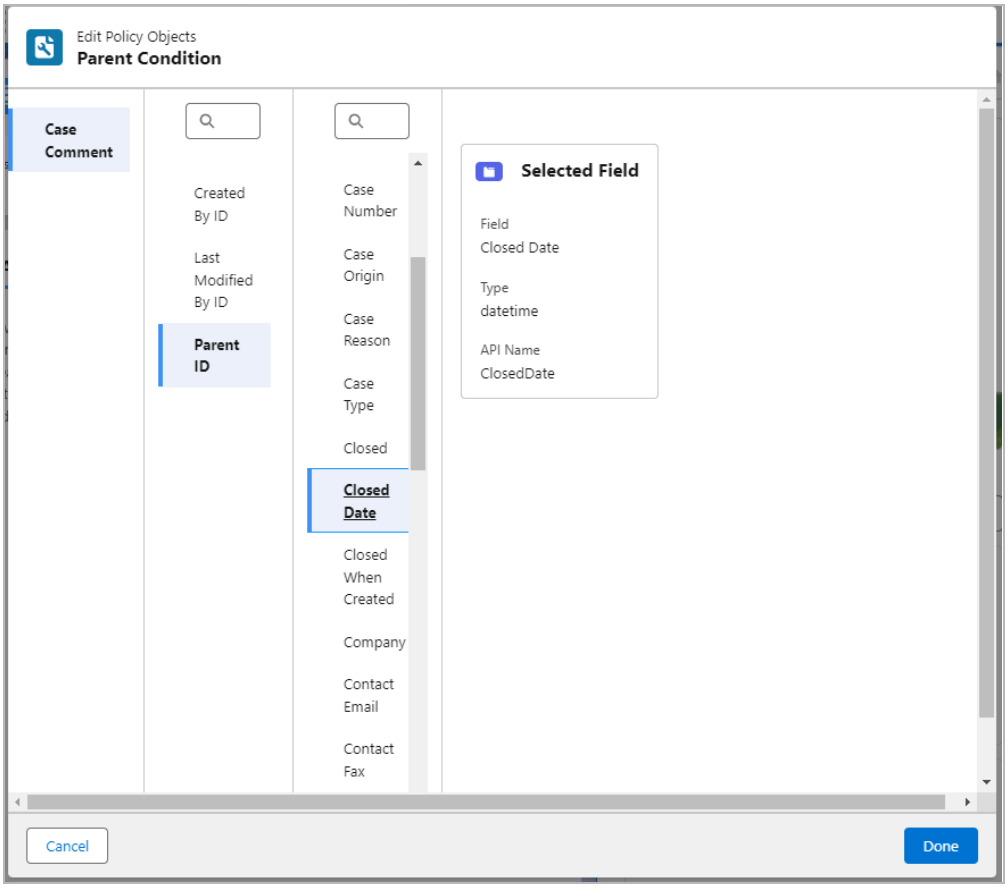
  - Select **Data Management Policy** and click 

  - For **Data Management Policy Name**, enter “Cases - delete comments 3 years after closed"
  - Click 

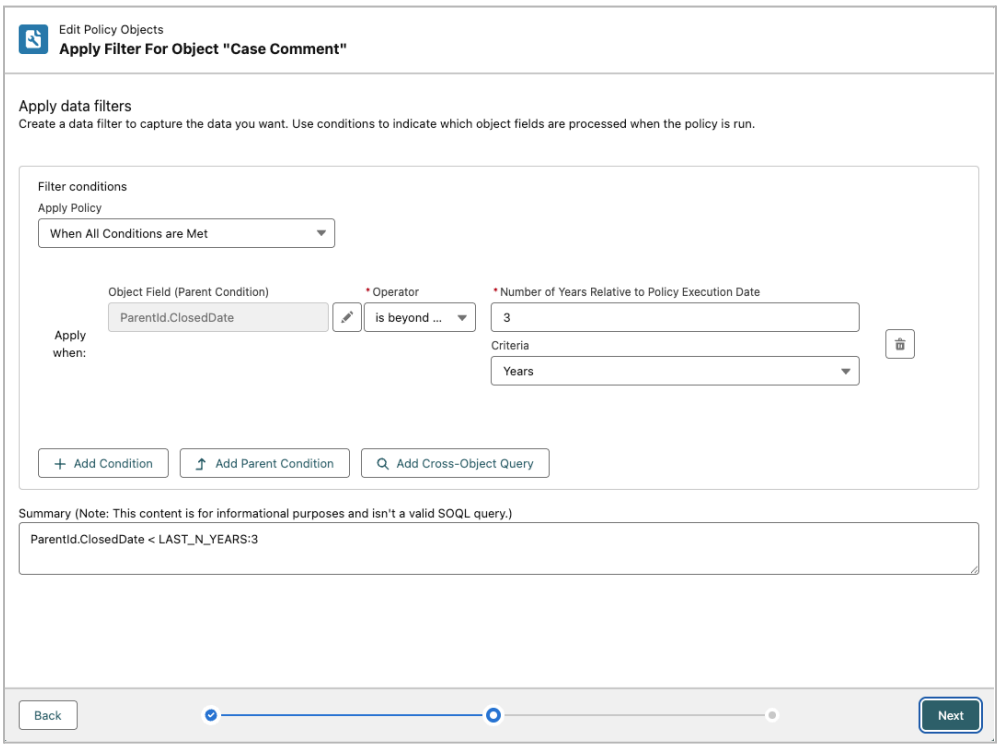
  - Under **Active Objects**, click 

  - In the Quick Find box under **Available Objects**, type “Case”, and then select the **Case Comment** Object

- Click Next
- On the **Apply data filters** page, click the Add Parent Condition button
- Click **Parent ID**, then click **Closed Date**, and click Done



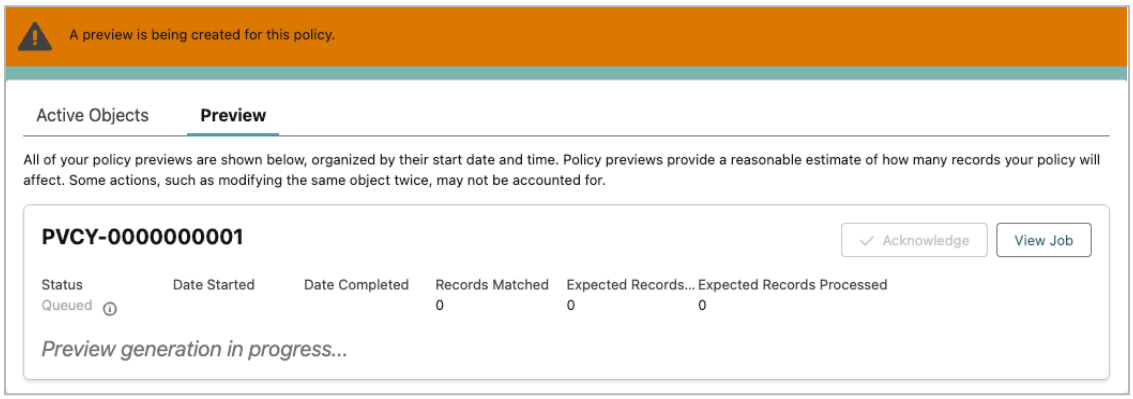

- On the **Apply data filters** page, set the **Operator** to "is beyond the last"
- Set **Number of Days Relative to Policy Execution Date** to "3"
- Set **Criteria** to “Years”

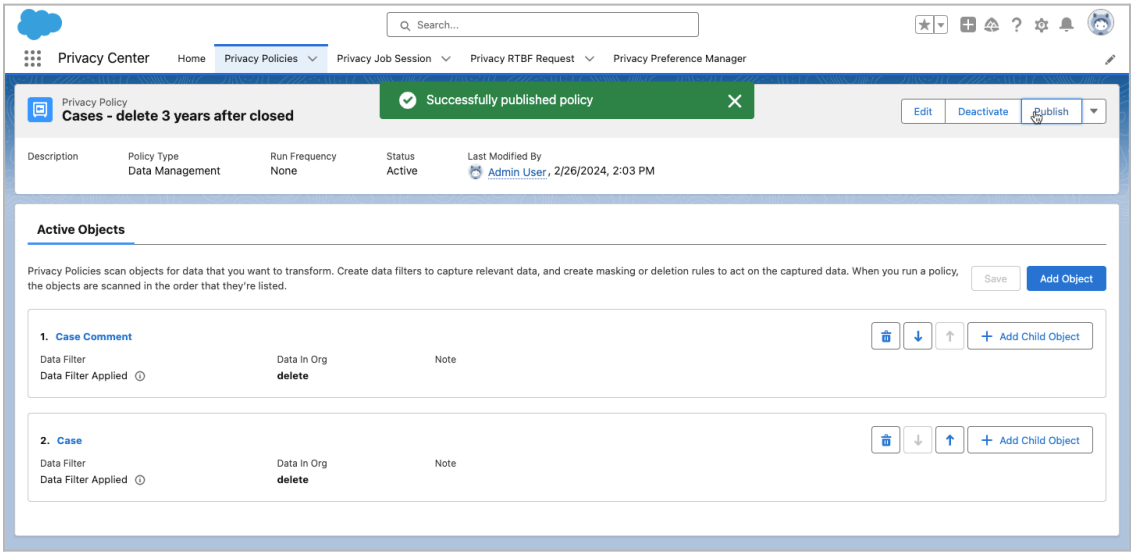



- Click Next
- On the **Add data transformation rules** page, scroll to the bottom, and next to **Action on Files and Attachments**, choose **Delete All**
- Click Next
- Click Done

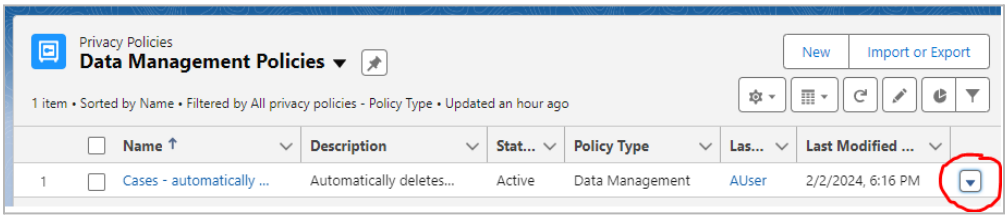
- Delete any Case records that have been closed for more than three years
  - Click Add Object
  - In the **Available Objects** Quick Find box, type “Case” and select the **Case** Object
  - Click Next
  - Click + Add Condition
  - For **Object Field**, select the **Closed Date (DATETIME)** field
  - For **Operator**, select ‘“is beyond the last”
  - For **Number of Days**, enter “3”
  - Set **Criteria** to “Years”
- Click Next
- Click Next
- Click Done

- Click Save
- Click Generate Preview on the top right of the page
- Click Generate Generation may take a minute
- Click the **Preview** tab



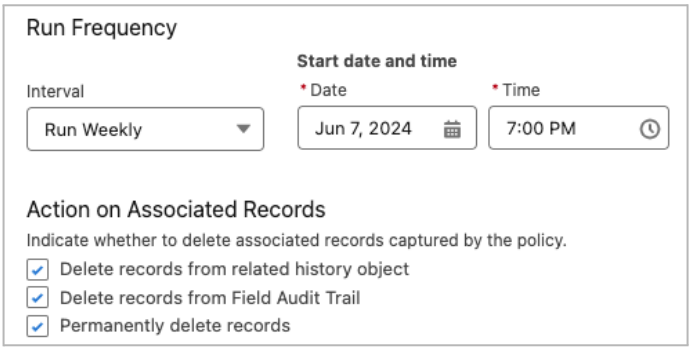




- Schedule your policy to run on a regular basis
  - Click the **Privacy Policies** tab
  - Click the down-arrow (right-hand side) next to your newly saved policy and select **Edit**

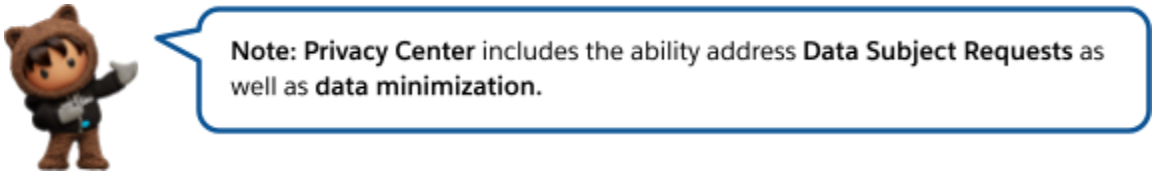



  - Under **Run Frequency**, set the Interval to **Run Weekly**
  - Set the start date and time to this Friday at 7 pm

- Tick the checkboxes at the bottom of the page to delete records from the related history object, delete records from Field Audit Trail, and permanently delete records rather than move them to the recycle bin.




- Click **Save**



# Want to learn more?

As the capabilities of Einstein and Salesforce Trusted Services continue to expand, Salesforce is providing a growing set of enablement offerings to help customers maximize the value of the platform. A wide range of resources are now available to learn more about getting started with AI and closing the trust gap.

## Trailhead

There are many courses on **Trailhead** to help you get up to speed.  Check out some Trailmixes at http://sfdc.co/tai-thsec.

## Community Groups

You are not alone. People all over the world are learning about AI and Security. Salesforce has a forum for those people (and you) to discuss and learn.

- Join the Einstein Group: http://sfdc.co/tai-einsteingroup
- Join the Salesforce Shield and Security Center Group: http://sfdc.co/tai-shieldgroup

## Documentation

- Add Intelligence To Your Apps: http://sfdc.co/tai-intelligent
- Einstein Generative AI: http://sfdc.co/tai-genai
- Sales Cloud Einstein: http://sfdc.co/tai-sales
- Shield Learning Map: https://shieldlearningmap.com/
- Security Center: http://sfdc.co/tai-securitycenter
- Privacy Center: http://sfdc.co/tai-privacycenter
- Salesforce Backup: http://sfdc.co/tai-backup

## Certification Support

- Salesforce Certified AI Associate credential: http://sfdc.co/tai-aiassociate
- Salesforce Certified AI Specialist credential: http://sfdc.co/tai-aispecialist

## Get a Copy of This Guide:

- Download a copy of this guide from: http://sfdc.co/tai-guide
- Get a copy of the workshop presentation: http://sfdc.co/tai-preso

## Where Do We Go From Here?

Reach out to your Account Executive today to schedule a customized session with our Security Architects. Together, we'll explore how you can close the trust gap at your own company with the Einstein Trust Layer and Salesforce Trusted Services.