Own{backup}

Salesforce Shield Platform Encryption Checklist

A guide for determining what fields can be encrypted and why some can't

Data classification exercise

Identify which fields you want to encrypt based on regulatory, security, privacy and compliance requirements.

For each field, answer the following questions

Answer the following questions for a single field to determine if it can be encrypted:

	YES	NO
Is the field referenced in a criteria-based sharing rule?	☐	☐
If the field is referenced in an ApexClass or Trigger…	☐	☐
Is the field aggregated in a SOQL query?	☐	☐
Is the field used within a SOQL/SOSL where clause?	☐	☐
Is the field used within a SOQL/SOSL group by clause?	☐	☐
Is the field used within a SOQL/SOSL order by clause?	☐	☐
Is the field a custom field with a data type that does not include those below?	☐	☐

Email	Phone	Text Area
Text	URL	Date/Time
Text Area (Long)	Date	Rich Text Area

	YES	NO
Is the field on an external data object?	☐	☐
Is the field used in an Account Contact relation?	☐	☐
Is the field referenced in an Index?	☐	☐
Does the field have data translation enabled?	☐	☐
Is the field a Rich Text Area Type on Knowledge Articles?	☐	☐
If Partner Portal is enabled, is the field a standard field?	☐	☐

If Partner Portal is not enabled, is the field a standard field?

	YES	NO
Lead object and not listed below?	☐	☐

Name	Email	Fax
Phone	Company	Description
Title	Mobile	Website
Address		

Account object and not listed below? ☐ ☐

Description	Website	Fax
Name	Phone	Shipping Address
Account Site	Billing Address	

Contact object and not listed below? ☐ ☐

Description	Other Phone	Assistant
Email	Home Phone	Assistant Phone
Fax	Phone	Address
Mobile	Mailing Address	Title
Name		

Email Message object and not listed below? ☐ ☐

Text Body	Address	To Address
HTML Body	Subject	CC Address
Headers	From Name	BCC Address
Email Message Relation	From Address	

Case object and not listed below? ☐ ☐

Subject	Description

Case Comments object and not listed below? ☐ ☐

Body

Opportunity object and not listed below? ☐ ☐

Name	Description	Next Step

Contract object and not listed below? ☐ ☐

Billing Address	Shipping Address

Individual object and not listed below? ☐ ☐

Name

List Email object and not listed below? ☐ ☐

From Name	From Address	Reply to Address

List Email Sent Result object and not below? ☐ ☐

Email

Service Appointment object and not listed below? ☐ ☐

Address	Description	Subject

Work Order object and not listed below? ☐ ☐

Address	Description	Subject

Work Order Line Item object and not listed below? ☐ ☐

Address	Description	Subject

	YES	NO

Activity (Task/Event) object and not listed below? ☐ ☐

Description   Subject

Chat Transcript object and not listed below? ☐ ☐

Body   Supervisor Transcript Body

Conversation Entries object and not listed below? ☐ ☐

Actor Name   Message

Messaging end user object and not listed below? ☐ ☐

Profile Picture URL

Business License object and not listed below? ☐ ☐

Identifier

Business License Application object and not listed below: ☐ ☐

Site Address

Business Profile object and not listed below: ☐ ☐

Business Operating Name   Business Tax Identifier

Course Offering object and not listed below: ☐ ☐

Name

Conversation Context Entry object and not listed below: ☐ ☐

Key   Value

Contact Point Address object and not listed below: ☐ ☐

Address

Contact Point Email object and not listed below: ☐ ☐

Email Address

Contact Point Phone object and not listed below: ☐ ☐

Telephone Number

Web Quote object and not listed below: ☐ ☐

Introduction	Ship to Name	Product Code
Ship to Name	Description	Ship to Country
Ship to Street	Ship to City	Ship to Stat
Notes	Ship to Postal Code	

Custom Objects object and not listed below: ☐ ☐

Name

Public Complaint object and not listed below: ☐ ☐

| Business Name | Email | Last Name |
| Business Address | First Name | Mobile Number |

	YES	NO

Recommendations object and not listed below:

Description

☐ ☐

Regulatory Code Violation object and not listed below:

Description   Corrective Action Description

☐ ☐

Training Course object and not listed below:

Description   Name

☐ ☐

Violation Enforcement Action object and not listed below:

Description

☐ ☐

Employee object and not listed below:

Alternate Email   Home Address   First Name
Email   Preferred First Name   Middle Name
Home Phone   Last Name   Work Phon

☐ ☐

Identity Document object and not listed below?

Expiration Date   Issue Date   Document Number

☐ ☐

If Health Cloud is enabled, is the field a standard field on the…

Care Request object and not listed below

Admission Notes   Member First   Member Last Name Root
Medical Director   Name Resolution   Cause Notes
Notes Member Group   Notes   First Reviewer Notes
Number   Facility   Member ID
Disposition Notes   RecordNumber

☐ ☐

Care Request Drug object and not listed below?

Prescription Number

☐ ☐

Contact Encounter object and not listed below?

Name

☐ ☐

Coverage Benefit object and not listed below?

Benefit Notes   Out-of-Pocket Notes   Deductible Notes
Lifetime Maximum Notes   Copay Notes
Coinsurance Notes   Source System Identifier

☐ ☐

Coverage Benefit Item object and not listed below?

Coverage Level   Notes   Identifier
Service Type Code   Source System   Service Type

☐ ☐

Member Plan object and not listed below?

Affiliation   Group Number   Issuer Number
Member Number   Primary Care Physician   Source System Identifier

☐ ☐

	YES	NO
Purchaser Plan object and not listed below?	☐	☐

Plan Number   Service Type
Source System   Source System Identifier

Purchaser Plan Association object and not listed below?	☐	☐

Source System   Status   ID
Source System Identifier   Purchaser Plan Association

OCR Document Scan Result object and not listed below?	☐	☐

Extracted Values

OCR Scan Result Template Mapping object and not listed below?	☐	☐

Mapped Fields

If Financial Services Cloud is enabled, is the field a standard field on the…

Business milestone object and not listed below?	☐	☐

Name

Financial Deal object and not listed below?	☐	☐

Description   Financial Deal Code   Name
(FinancialDealCode)

Financial Deal Interaction object and not listed below?	☐	☐

Comment

Financial Deal Interaction Summary object and not listed below?	☐	☐

Comment

Interaction object and not listed below?	☐	☐

Description   Name

Interaction Summary object and not listed below?	☐	☐

Next Steps(NextSteps)   Meeting Notes   Title (Name)
(MeetingNotes)

Interaction Summary Discussed Account object and not listed below?	☐	☐

Comment

Claim object and not listed below?	☐	☐

Claim Number   Incident Site   Report Number

Customer property object and not listed below?	☐	☐

Address   Lien Holder Name

Insurance policy object and not listed below?	☐	☐

Policy Number   Servicing Office   Universal Policy Number

	YES	NO
Person life event object and not listed below? Event Name	☐	☐
Security holding object and not listed below? Name	☐	☐

If Salesforce CPQ is enabled, is the field a standard field on the…

	YES	NO
Lookup Data object and not listed below? Lookup Data	☐	☐
Process Input Value object and not listed below? Value	☐	☐

Quote object and not listed below?   ☐ ☐

Bill To City	BillToStreet	Ship To Name
Bill To Country	Introduction	Ship To Postal Code
Bill To Name	Notes	Ship To State
Bill To Postal Code	Ship To City	Ship To Street
Bill To State	Ship To Country	

	YES	NO
Quote Template object and not listed below? Company Name	☐	☐

Quote Term object and not listed below?

Body

Tax Exemption Certificate object and not listed below?   ☐ ☐

Certificate Number	Notes	Street Address
Country	Postal Code	Street Address_2
Exempt Company Name	State	County

If Salesforce Surveys is enabled, is the field a standard field on the…

Survey Question Response object and not listed below?   ☐ ☐

Date Value	Response Value
Date Time Value	Choice Value

If Einstein Bots are enabled, is the field a standard field on the…

	YES	NO
Utterance Suggestion object and not the Utterance field?	☐	☐

	YES	NO

If the field is referenced within a formula field...

	YES	NO
Is the field referenced by a function, other than those below?	☐	☐

IF (RETURNVALUE)	IMAGE	BLANKVALUE
HYPERLINK	ISBLANK	
ISNULL	NULLVALUE	

	YES	NO
Is the field referenced by an operator other than "&" or "+" ?	☐	☐

Name

	YES	NO
Is the field referenced within Process Builder, other than an Update Records action?	☐	☐
Does the field have "Unique" checked?	☐	☐
Is the field an external ID?	☐	☐
Is the field referenced within a Flow in any of these elements and resources below?	☐	☐

Dynamic Record Choice resource	Fast Lookup element	Record Lookup element
Record Update element	Fast Lookup element	Record Lookup element
	Record Delete element	

	YES	NO
Is the field used in a report filter?*	☐	☐
Is the field used in list view filter or sort?*	☐	☐

This does not prevent encryption. However, encrypting a field that is used in a report filter or list view filter will remove the field from report filters / list view filters after encryption.

Validate if desired fields can be encrypted

Were all your list items marked?

Awesome, you can encrypt with Probablistic Encryption!

Were any of the list items answered?

Sorry, this means the field cannot be encrypted by Salesforce Shield with the Probablistic Encryption scheme.

But not all is lost!

The new Deterministic encryption scheme may work. Follow the steps on the next page to determine if you can encrypt using Deterministic encryption.

For Each Field, Answer the Following Questions

Answer the following questions for a single field to determine if it can be encrypted with Deterministic encryption:

	YES	NO
Is the field referenced in a criteria-based sharing rule?	☐	☐

If the field is referenced in an ApexClass or Trigger…

	YES	NO
Is the field aggregated in a SOQL query?	☐	☐
Is the field used within a SOQL/SOSL where clause with an operator other than those below?	☐	☐

=	not in	in
!=		

	YES	NO
Is the field used within a SOQL/SOSL group by clause?	☐	☐
Is the field used within a SOQL/SOSL order by clause?		
Is the field referenced in a criteria-based sharing rule?	☐	☐

Email	Phone	Text Area
Text	URL	Date/Time
Text Area (Long)	Date	Rich Text Area

	YES	NO
Is the field on an external data object?	☐	☐
Is the field used in an Account Contact relation?	☐	☐
Is the field referenced in an Index?	☐	☐
Does the field have data translation enabled?	☐	☐
Is the field a Rich Text Area Type on Knowledge Articles?	☐	☐
If Partner Portal is enabled, is the field a standard field?	☐	☐

If Partner Portal is not enabled, is the field a standard field on the…

	YES	NO
Lead object and not listed below?	☐	☐

Name	Email	Description
Phone	Company	Website
Title	Mobile	
Address	Fax	

	YES	NO
Account object and not listed below?	☐	☐

Description	Website	Fax
Name	Phone	Shipping Address
Account Site	Billing Address	

	YES	NO

Contact object and not listed below?   ☐ ☐

Description	Name	Mailing Address Assistant
Email	Other Phone	Assistant Phone Address
Fax	Home Phone	Title
Mobile	Phone	

Email Message object and not listed below?   ☐ ☐

Text Body	Subject	To Address
HTML Body	From Name	CC Address
Headers	From Address	BCC Address
Email Message Relation Address		

Case object and not listed below?   ☐ ☐

Subject	Description

Case Comments object and not listed below?   ☐ ☐

Body

Opportunity object and not listed below?   ☐ ☐

Name	Description	Next Step

Contract object and not listed below?   ☐ ☐

Billing Address	Shipping Address

Individual object and not listed below?   ☐ ☐

Name

List Email object and not listed below?   ☐ ☐

From Name	From Address	Reply to Address

List Email Sent Result object and not below?   ☐ ☐

Email

Service Appointment object and not listed below?   ☐ ☐

Address	Description	Subject

Work Order object and not listed below?   ☐ ☐

Address	Description	Subject

Work Order Line Item object and not listed below?   ☐ ☐

Address	Description	Subject

Activity (Task/Event) object and not listed below?   ☐ ☐

Description	Subject

Chat Transcript object and not listed below?   ☐ ☐

Body	Supervisor Transcript Body

Conversation Entries object and not listed below?   ☐ ☐

Actor Name Message

	YES	NO
Messaging end user object and not listed below? Profile Picture URL	☐	☐
Business License object and not listed below? Identifier	☐	☐
Business License Application object and not listed below: Site Address	☐	☐
Business Profile object and not listed below: Business Operating Name Business Tax Identifier	☐	☐
Course Offering object and not listed below: Name	☐	☐
Conversation Context Entry object and not listed below: Key Value	☐	☐
Contact Point Address object and not listed below: Address	☐	☐
Contact Point Email object and not listed below: Email Address	☐	☐
Contact Point Phone object and not listed below: Telephone Number	☐	☐
Web Quote object and not listed below: Introduction Ship to Name Ship to Country Ship to Name Description Ship to State Ship to Street Ship to City Notes Ship to Postal Code	☐	☐
Custom Objects object and not listed below: Name	☐	☐
Public Complaint object and not listed below: Business Name Business Email Last Name Address First Name Mobile Number	☐	☐
Recommendations object and not listed below: Description	☐	☐
Regulatory Code Violation object and not listed below: Description Corrective Action Description	☐	☐
Training Course object and not listed below: Description Name	☐	☐
Violation Enforcement Action object and not listed below: Description	☐	☐

	YES	NO

Employee object and not listed below: ☐ ☐

Alternate Email	Home Address	First Name
Email	Preferred First Name	Middle Name
Home Phone	Last Name	Work Phone

Identity Document object and not listed below? ☐ ☐

Expiration Date	Issue Date	Document Number

If Health Cloud is enabled, is the field a standard field on the…

Care Request object and not listed below ☐ ☐

Admission Notes	Member First Name	Root Cause Notes
Medical Director Notes	Resolution Notes	First Reviewer Notes
Member Group Number	Facility Record Member	Member ID
Disposition Notes	Last Name	

Care Request Drug object and not listed below? ☐ ☐

Prescription Number

Contact Encounter object and not listed below? ☐ ☐

Name

Coverage Benefit object and not listed below? ☐ ☐

Benefit Notes	Source System Identifier	Out-of-Pocket Notes
Copay Notes	Coinsurance Notes	Deductible Notes
Lifetime Maximum Notes		

Coverage Benefit Item object and not listed below? ☐ ☐

Coverage Level	Notes	Identifier
Service Type Code	Source System	Service Type

Member Plan object and not listed below? ☐ ☐

Affiliation	Group Number	Issuer Number
Member Number	Primary Care Physician	Source System Identifier

Purchaser Plan object and not listed below? ☐ ☐

Plan Number	Service Type	Source System Identifier
Source System		

Purchaser Plan Association object and not listed below? ☐ ☐

Source System	Status
Source System Identifier	Purchaser Plan Association ID

OCR Document Scan Result object and not listed below? ☐ ☐

Extracted Values

OCR Scan Result Template Mapping object and not listed below? ☐ ☐

Mapped Fields

If Financial Services Cloud is enabled, is the field a standard field on the...

		YES	NO
Business milestone object and not listed below? Name		☐	☐

Financial Deal object and not listed below?   ☐ ☐

Description   Financial Deal Code   Name
                 (FinancialDealCode)

Financial Deal Interaction object and not listed below?   ☐ ☐

Comment

Financial Deal Interaction Summary object and not listed below?   ☐ ☐

Comment

Interaction object and not listed below?   ☐ ☐

Description   Name

Interaction Summary object and not listed below?   ☐ ☐

Next Steps(NextSteps)   Meeting Notes   Title (Name)
                            (MeetingNotes)

Interaction Summary Discussed Account object and not listed below?   ☐ ☐

Comment

Claim object and not listed below?   ☐ ☐

Claim Number   Incident Site   Report Number

Customer property object and not listed below?   ☐ ☐

Address   Lien Holder Name

Insurance policy object and not listed below?   ☐ ☐

Policy Number   Servicing Office   Universal Policy Number

Person life event object and not listed below?   ☐ ☐

Event Name

Security holding object and not listed below?   ☐ ☐

Name

If Salesforce CPQ is enabled, is the field a standard field on the...

Lookup Data object and not listed below?   ☐ ☐

Lookup Data

Process Input Value object and not listed below?   ☐ ☐

Value

Quote object and not listed below?   ☐ ☐

Bill To City   Bill To Name   Bill To State
Bill To Country   Bill To Postal Code   Bill To Street
Ship To City   Ship To Postal Code   Ship To Street
Ship To Country   Ship To State   Introduction
Ship to Name   Notes

| Quote Template object and not listed below?
Company Name | ☐ | ☐ |

| Quote Term object and not listed below?
Body | ☐ | ☐ |

| Tax Exemption Certificate object and not listed below? | ☐ | ☐ |

Certificate Number   Notes   Street Address
Country   Postal Code   Street Address_2
Exempt Company Name   State   County

If Salesforce Surveys is enabled, is the field a standard field on the…

| Survey Question Response object and not listed below? | ☐ | ☐ |

Date Value   Choice Value   Response Value
Date Time Value

If Einstein Bots are enabled, is the field a standard field on the…

| Utterance Suggestion object and not the Utterance field? | ☐ | ☐ |

If the field is referenced within a formula field…

| Is the field referenced by a function, other than those below? | ☐ | ☐ |

IF (RETURNVALUE)   ISNULL   ISBLANK
HYPERLINK   IMAGE   NULLVALUE
    BLANKVALUE

| Is the field referenced by an operator other than "&" or "+" ?
Name | ☐ | ☐ |

| Is the field referenced within Process Builder, other than an Update Records action? | ☐ | ☐ |

| Does the field have "Unique" checked? | ☐ | ☐ |

| Is the field an external ID? | ☐ | ☐ |

| Is the field referenced within a Flow in any of these elements and resources below? | ☐ | ☐ |

Dynamic Record Choice   Fast Lookup element   Record Lookup element
Record Update element   Record Delete element

| Is the field used in a report filter, and not include the below?* | ☐ | ☐ |

=   contains   does not contain
!=

PLEASE NOTE: Deterministic encryption only accommodates direct equality matches.

| Is the field used in a list view filter or sort*? | ☐ | ☐ |

This does not prevent encryption. However, encrypting a field that is used in a report filter or list view filter will remove the field from report filters / list view filters after encryption.

Validate If Desired Fields Can Be Encrypted

If all the items in Step 4 were marked **No**, you can use Deterministic Encryption!
If any of the list items were marked **yes**, you cannot use Deterministic Encryption.

Repeat For All Desired Fields

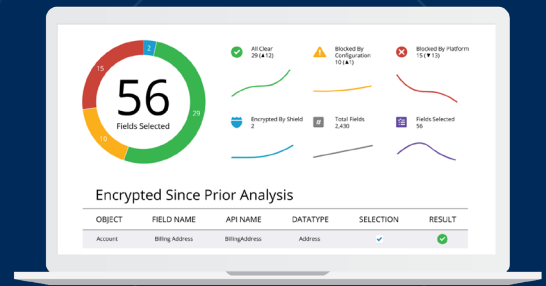Repeat this checklist process for every field that you want to encrypt.

Implement Encryption in Salesforce Shield PE

✔ Automate the Analysis & Simplify the Encryption Process!

✔ Implement Salesforce Shield in weeks, not months.

salesforce available on AppExchange

OwnBackup Secure For Shield Automate Platform Encryption

Reduce up to 4 months of implementation time

- Easily compare what you want to encrypt versus what you actually can encrypt
- Know which fields require mitigation to allow for encryption

Produce compliance reports and ensure ongoing maintenance

- Automatically keep up to date with Salesforce releases (3x a year) and instantly see changes to your org
- See the encryption status of all your fields in real-time.
- Easily share encryption status reports to InfoSec with confidence

available on AppExchange

Own{backup}

About OwnBackup

OwnBackup, the leading SaaS data protection platform, provides secure, automated, daily backups and rapid data restore tools of SaaS and PaaS data. Helping nearly 4,000 businesses worldwide safeguard critical cloud data, OwnBackup covers data loss and corruption caused by human errors, malicious intent, integration errors and rogue applications.

Co-founded by seasoned data-recovery, data-protection, and information-security experts, OwnBackup is a backup and restore independent software vendor (ISV) on the Salesforce AppExchange. Headquartered in Englewood Cliffs, New Jersey, with research and development (R&D), support, and other functions in Israel, EMEA and APAC, OwnBackup is the partner of choice for some of the world's largest users of SaaS applications.

ownbackup.com