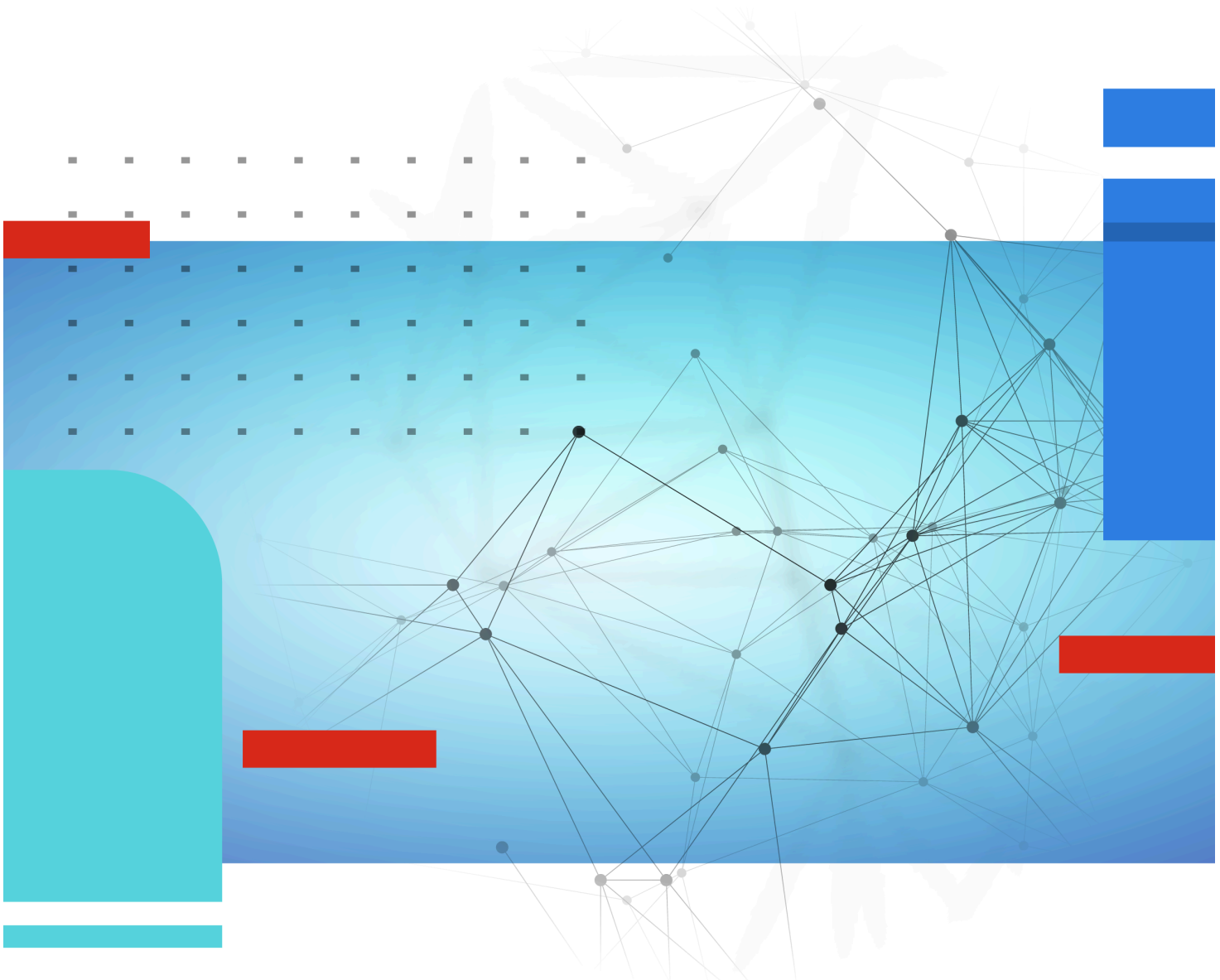
FortiCASB-SSPM Application Connector

Salesforce Connector



Salesforce Connector

Category

- Sales & Marketing

Connection Method

- OAuth

Data Collected

- Misconfigurations
- 3rd Party Applications
- Identities
- Tokens
- Activities

Supported Actions

- Revoke Permissions to 3rd-party apps
- Data Actions- Delete
- Data Actions- Preview
- Data Actions- Download

Integration Guide

Intro

Use this guide to add Salesforce as a secure application on the Fortinet SaaS Security platform. During the onboarding, the platform leverages OAuth method to connect with Salesforce, delivering actionable remediation steps tailored to effectively mitigate risks and support your organization's security goals.

Required Permissions for the Connection

Permissions Needed: OAuth authorization by Salesforce Admin account

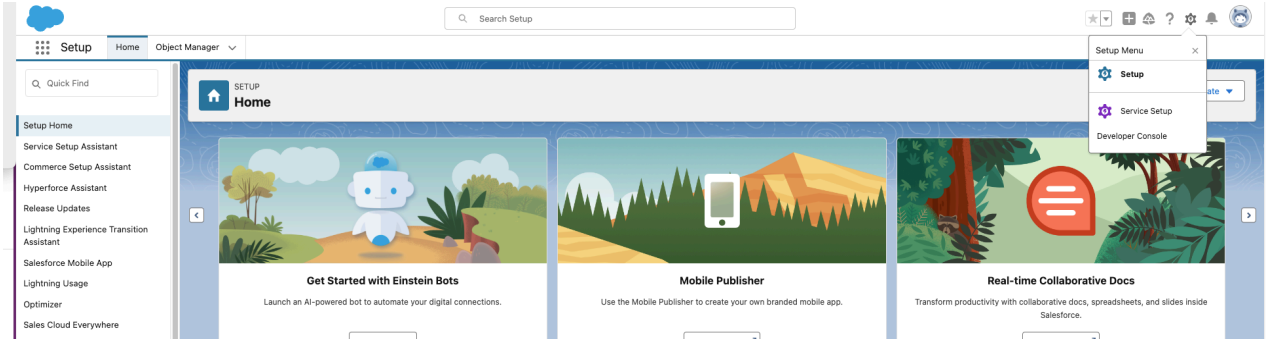
Requirement	Description
Salesforce administrator Must have: - View Setup and Configuration - API enabled - Modify All Data OR Modify MetaData (for full misconfigurations risk scan)* - Customize Application	The admin account is required to authorize the OAuth process.
"Customize Application"	It provides the necessary access for the application to interact with.

* For comprehensive misconfigurations risks scan of all security configurations, grant either Modify All Data OR Modify Metadata permissions. Alternatively, you can grant View All Data permission, which will only scan a subset of misconfigurations risks.

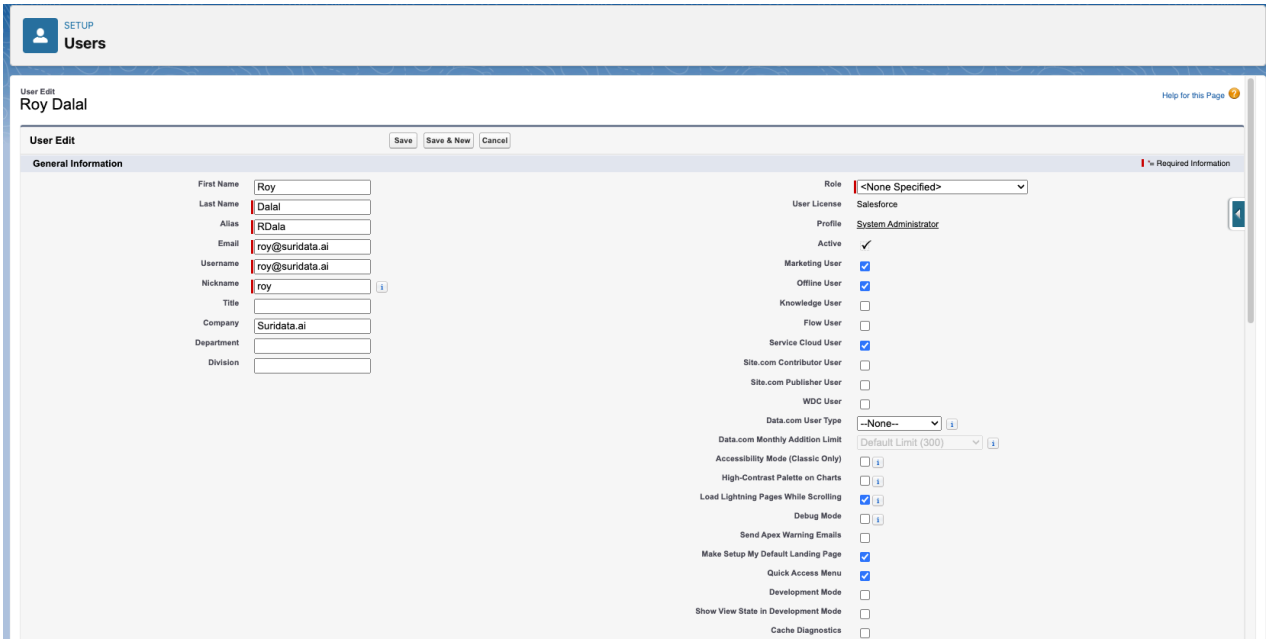
Integration Process

Step 1: Verify the Salesforce Admin account has the required permissions

1. Log in to the relevant admin account in Salesforce
2. In the top right corner, click on "Setup"



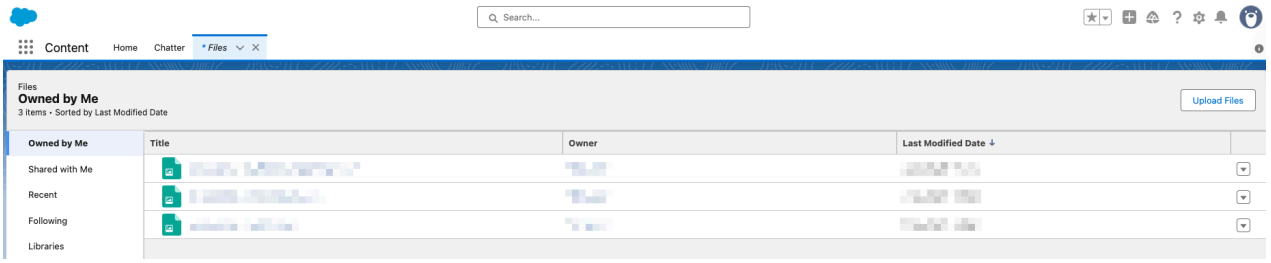
3. In the left-hand menu, click on "Users" to expand the options, then select "Users" at the bottom of the list
4. Click "Edit" next to the relevant admin account
5. On the right, click on the Profile to edit the permissions



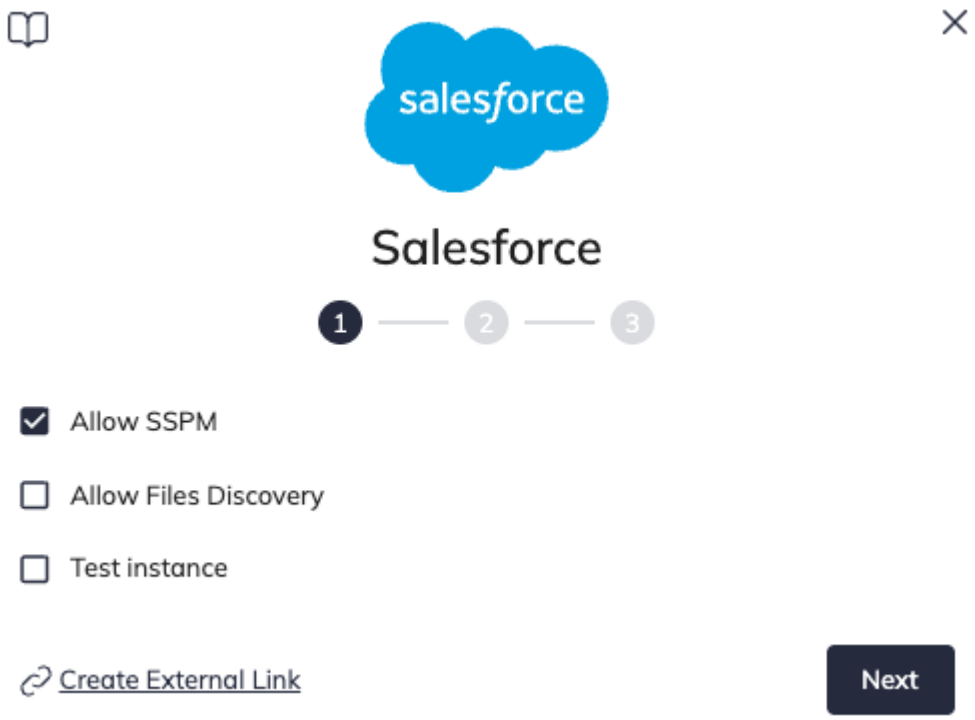
6. Use the find setting search bar to search for "Modify Metadata Through Metadata API Functions" permission, make sure its selected, if not please select it.
7. Repeat and select the "Customize Application" permission as well

Step 2: Authorize the application

1. Log in to your Forticasb-sspm account and navigate to the Apps Store
2. Search "Salesforce"
3. For misconfigurations, users, 3rd party apps and tokens collection, keep the "Allow SSPM" checkbox marked. For files collection, mark the "Allow Files Discovery"áand click "Next". This will be enabled if you have a "Files" section in Salesforce. For example:



For connecting a test or sandbox instance, check the "Test instance" checkbox.



4. Click Connect
5. Log in using the appropriate Admin credentials and click "Authorize"
6. If your organization uses a custom domain, please select it before logging in.

That's it! You're all set.

Your SaaS security is our priority!

The Fortinet Team