



Quick Start Guide

Use Valo AI in 3 Simple Steps



What is Valo?

Valo is a **ready-made Salesforce security and optimization product** that allows organizations to secure and manage their Salesforce data without the complexity, extensive configuration, or constant resourcing typically required by add-on products like Salesforce Shield or Event Monitoring.

Designed for immediate value, Valo works **out of the box** to provide critical insights into **Salesforce security, platform health, and adoption**. It eliminates the need for an Event Monitoring license while offering the ability to **block threats, send alerts, optimize costs**, and **refine user permissions**, enabling businesses to avoid data breaches and grow with smarter, zero-configuration security.

Whether you're a Salesforce expert or just starting out, you can use Valo for:

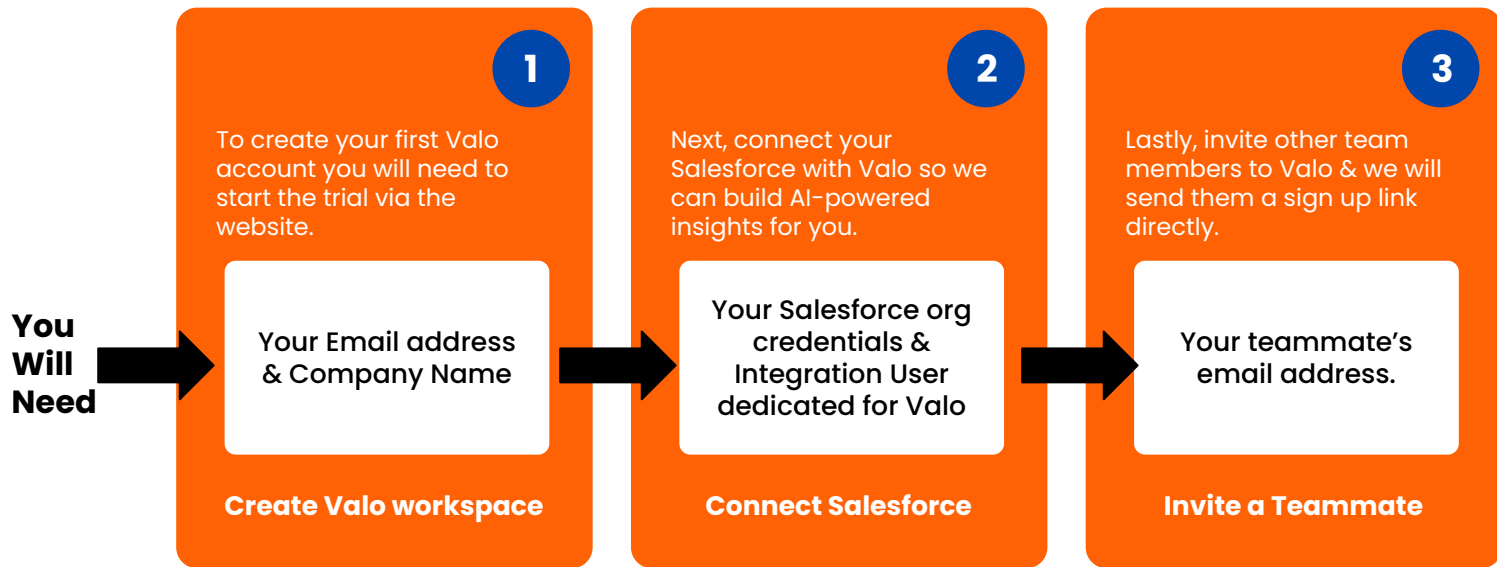
- **Apps & Connections:** Keep all your apps and Salesforce connections secure. This includes third-party apps and browser extensions. AI-powered security insights quickly show you how your apps are behaving and suggest ways to improve security.
- **User Permissions:** Easily manage who can access Salesforce, simplifying user access permissions.
- **License Management:** Monitor user activities in Salesforce. This helps you make smart decisions about license assignments and improve overall user adoption.

This guide will walk you through the basics to get you started with Valo.

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Get your Valo Workspace Set Up in 3 Simple Steps

Just 3 simple steps to AI-powered Salesforce management...



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Create Your Valo Workspace

1 Let's Create Your Valo Workspace

Have you already signed up and created a Valo workspace? If so, you can simply login directly to the workspace:

Login

If not, we have you covered:

[Click here](#)



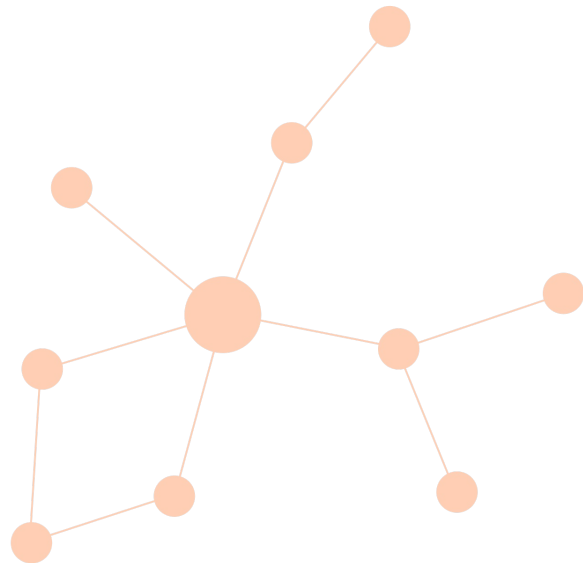
Enter your details



Check your email to
set a new password

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Connect Your Salesforce Org With Your Valo Workspace



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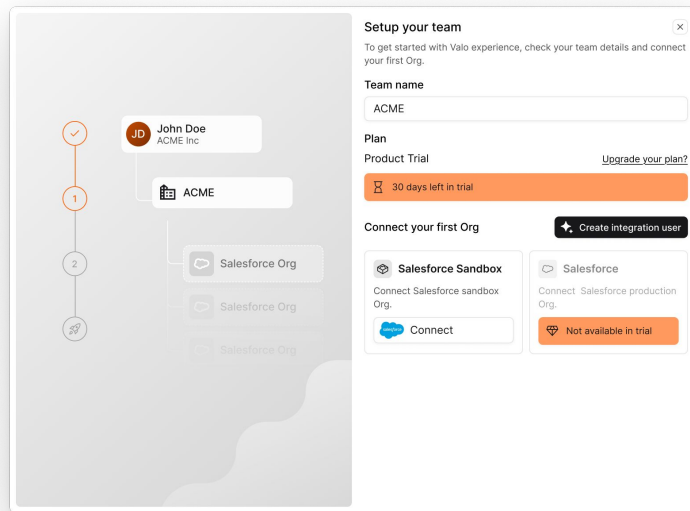
Connect Your Salesforce with Your Valo Workspace

Connecting your Salesforce with your Valo Workspace is super simple! After you log in for the first time (Step 1), we'll walk you through an onboarding process so you don't miss a beat. Here are your connection options:

- Connect Salesforce Sandbox(s) with Valo or,
- Connect Salesforce Production(s)

Just hit 'Connect' and login using the integration user credentials you just set up or then use your existing Salesforce credentials.

And voilà! Once you're authenticated, you'll be smoothly redirected to Valo.



Valo Tip: You can link multiple Salesforce orgs with Valo. Eliminate the need to login to Salesforce repeatedly.

We highly recommend using an integration user to connect your Salesforce with Valo. You can find detailed instructions on what permissions the user require [here](#).

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Invite a Teammate to Your Valo Workspace

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Invite a Teammate to Your Valo Workspace

You can invite your teammate(s) to the Valo workspace to increase collaboration across your Salesforce team. Click on "Invite User" and enter their email address and name, then click "Invite." They'll receive an invite to join in.

You're all set!

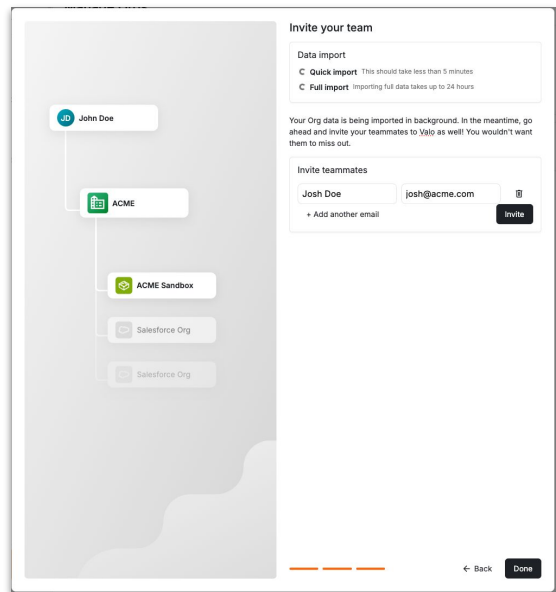
Now take a breather and grab a coffee.

While you're at it, AI magic will be happening in the background to set things up for you.

Valo will send you an email when the data sync is complete.

Up next

Let's Explore Your Valo Workspace Together



Just a heads-up: the initial metadata import might take a little while, but Valo imports some quick data so you can already start exploring.

Turn on Generative AI features for Your Workspace

Valo leverages Generative AI to provide proactive insights that help secure your Salesforce environment. These are opt-in features which you can disable/enable via the Admin interface.

Valo Admin

Settings

Users

Action Log

Subscription

Workspace name

Valo.ai

Opt-in features

☒

Generative AI features ⓘ



Enable Generative AI Features

Valo enables users to define personal or workspace preferences so that you have command over your settings.

How? Navigate to Valo Admin (located under your username on the left-hand bottom corner) to define your preferences. **You can enable our AI features by checking the Generative AI Features option.**

Up next

Let's Explore Valo Together

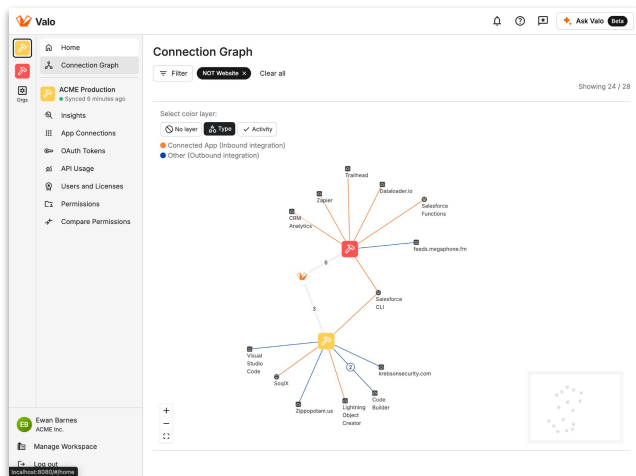


Time to Explore Your Valo Workspace



Explore All Your Apps & Connections

Inside Valo you can observe ALL your apps and connections to your Salesforce with our interactive graph view. Just click on the Connection Graph from the left-hand panel. Plus, you can easily dive into the security details of these connections by clicking on each connection.



Security Score

Valo rates the security of your apps to enable secure and smart choices when it comes to integrations in your Salesforce.

How? Click on any app name on the graph to see more details via the app detail panel.

Users, API Calls and Object Usage

Valo provides visibility into the users using the apps and their location analytics. You can further view the data these apps can access within your Salesforce.

How? Click on any app name on the graph to see more details via the app detail panel.



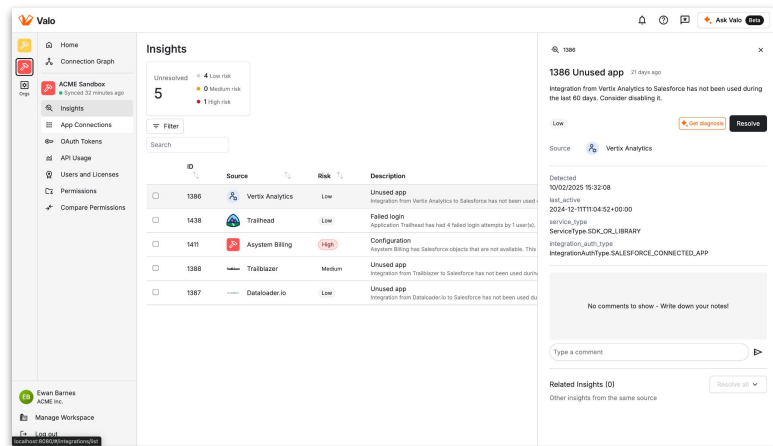
Valo Tip: If an app appears outside your geographical location, dig deeper. Customers have discovered unauthorized users and rogue apps by using our Connection Graph's visibility and data.

Up next

Let's Review Proactive Insights Valo has

Valo's AI-based Insights for Your Apps & Connections

Understanding your unique Salesforce landscape, Valo AI figures out what actions to take to keep your Salesforce secure. The more you use insights, the more powerful you also become as you learn common troublespots and how to mitigate them.



AI-powered Insights

Valo provides AI-powered insights to alert you of any misconfiguration or unexpected behaviour related to your connections in order to ensure the security of your Salesforce.

How? View app specific insights on the app detail panel or then navigate to Insights from the left-hand panel to view all insights.



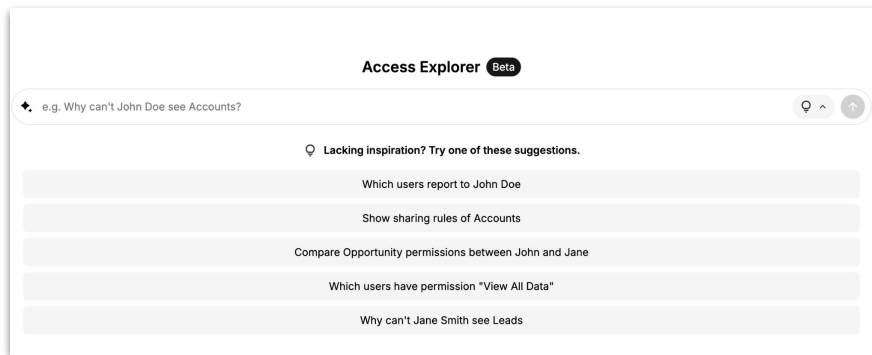
Scroll to the end of this document to learn more about the AI-powered Insights in Valo

Up next

Let's Understand Who Can See and Do What in Salesforce

Use Valo to Master Who Can See and Do What

As an Admin, you're responsible find and fix permission gaps — like lingering access for former employees — and troubleshoot why users can't access something. You can do all of that that with Valo's access explorer that provides answers about user permissions, profiles, and permission sets.



Access Explorer

Let's assume you want to clone Anna Garcia's permissions to use for newly onboarding user Amel Saarela..

How? Navigate to Access Explore and ask any question that you have in your mind. If you lack inspiration try one of the suggestions.



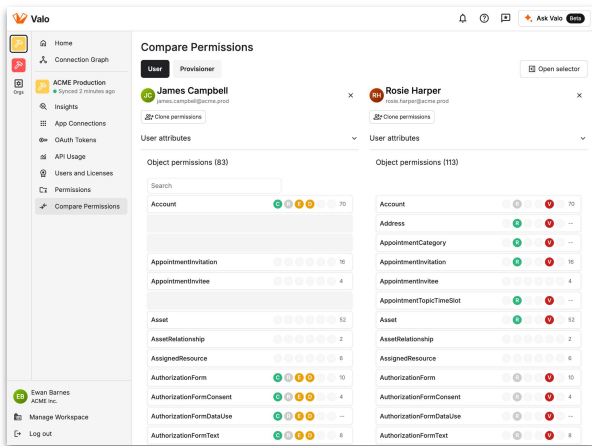
Valo Tip: Access Explorer supports **Sharing Rules** and other complex relationships.

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Let's Compare Permissions for Users in 3 Clicks

Use Valo to Compare & Resolve User Permissions

Inside Valo you can compare the permissions of all your Salesforce users in the same – or even across multiple orgs – that are connected with Valo. This one feature can help Admins save up to 3 hours of work time every day as they troubleshoot access management tickets. Close even more tickets from your backlog with this AI superpower!



Compare User Permissions

Valo makes troubleshooting user access tickets easier & reduces your daily task backlog.

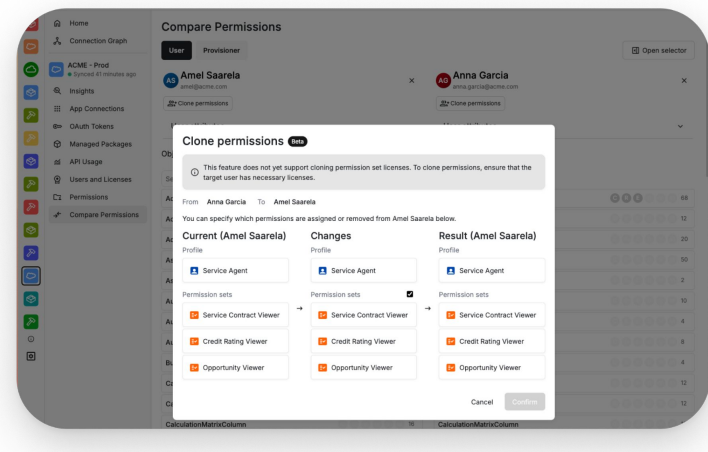
How? Navigate to Compare Permissions, click Open Selector and select the users you want to compare permissions for.

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Rapidly Onboard New Users in Your Company with ease

Rapidly Onboard New Salesforce Users with Ease

As an Admin, you're responsible for onboarding new users to Salesforce. Valo makes it a breeze by letting you quickly clone user permissions for new team members, saving you time and hassle. Enjoy the smoother onboarding experience!



Clone Users

Let's assume you want to clone Anna Garcia's permissions to use for newly onboarding user Amel Saarela..

How? Navigate to Compare Permissions, click Open Selector, select relevant users & click on Clone permissions under Anna Garcia to clone their permissions to Amel Saarela.



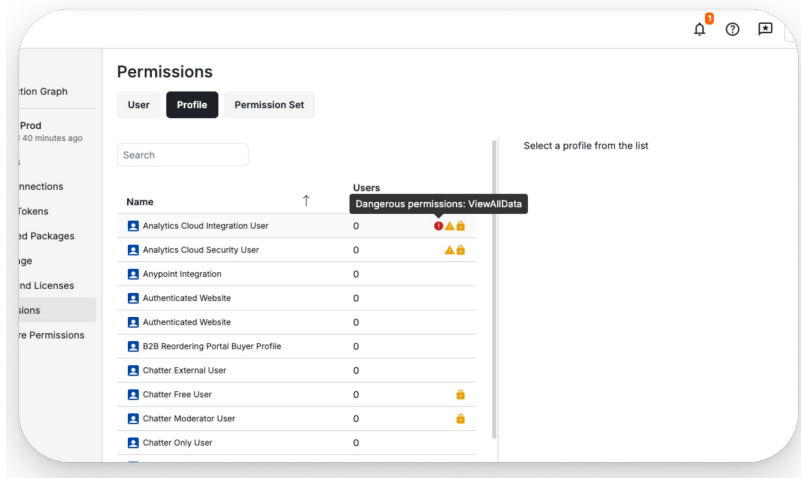
Valo Tip: Clone a user that's in the same team, role and geographic location. What used to take 7-10 clicks across different screens can now take seconds!

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Let's Uncover Dangerous Permissions in Your Salesforce

Uncover Dangerous Permissions in Your Salesforce

Valo takes a close look at all your permission sets and profiles to flag any risky permissions (if any), giving you a heads-up so you can keep your Salesforce landscape safe and sound.



AI-powered Insights for Permissions

Valo analyses permissions, profiles and permissions sets to alert you about dangerous permissions in your Salesforce.

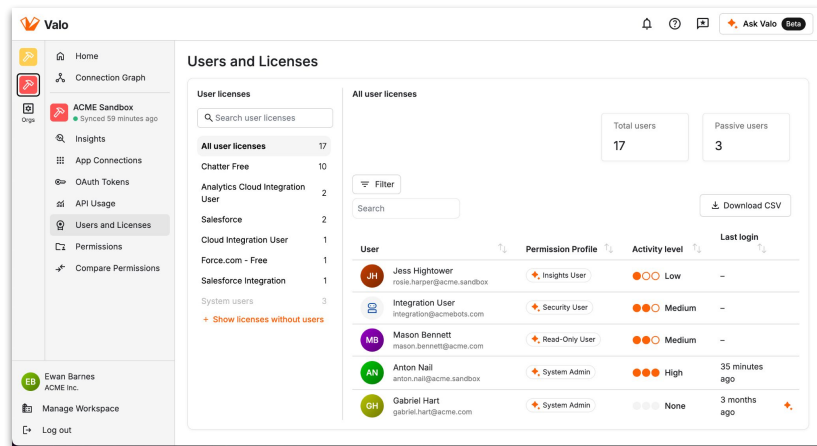
How? Navigate to Permissions, switch to Profile or Permission Sets as per your use case & view alerts raised by Valo for specific profiles/permissions sets.

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Optimize Salesforce License Costs with Valo

Let's Optimize Salesforce License Cost with Valo

With Valo's help, you can save costs by re-purposing Salesforce licenses and even lead user adoption activities within your company (finally, that promotion!). Navigate to the Users and Licenses tab to learn about your Salesforce user licenses.



AI-powered Recommendations by Valo

Valo analyses your Salesforce user license allocation & recommends smarter re-purposing of user licenses to drive cost reductions in your company.

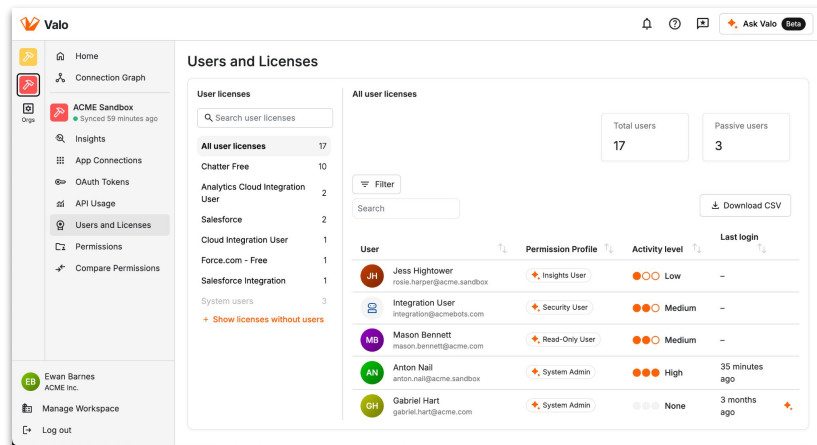
How? Navigate to Users and Licenses from the left-hand panel & if you see a sparkle icon next to the username, click on it to view the recommendation.

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Learn More About Your Salesforce Users & their Activity

Learn More About Your Salesforce Users

With Valo's help, you can better understand your Salesforce users by seeing more of their behavior and “connecting the dots” between their various actions. Navigate to the Users and Licenses tab to learn about your Salesforce user licenses.



AI-powered User Personas & User Activity

Valo segments your users based on their behaviour in Salesforce & enables you to understand more about them.

Valo also analyses user's activity (based on logins & object usage) & enables Salesforce Admins to drive user adoption activities in their companies.

How? Navigate to Users and Licenses from the left-hand panel to view the user personas. Click on the username to see more details on the activity level i.e. app-based login heatmap or object usage details.



Just a heads-up: **You need to enable Generative AI features from Manage Workspace for this to work. (See Page 9 for the How to)**

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Bonus Information to Get the Most From Valo



Bonus Information to Get the Most From Valo



Types of Insights in Valo

Valo's insider understanding of your Salesforce users, licenses and data can help you uncover personalized insights.

Categories of insights include:

Unexpected Object Usage

Displays an insight when unexpected read or write operations are performed on the following objects:

- requiring only admin access or,
- containing Personal Identifiable Information

Furthermore this can also be indicative of a scenario when an app is writing to an object that it has not accessed before. This kind of insight should be dealt with immediate investigations from admins as they can be early indicators of a potential attack or regulatory violation.

Unusual API Call Volume

Displays an insight when API Call Volume differs statistically from normal days e.g. the behavior is significantly different from the pattern Valo AI has observed in the past. A sudden spike in API activity could indicate an ongoing attack, such as data exfiltration or attempts to exploit vulnerabilities within the API. This could also be an indication of the app or connection not working.

Unused Integrations

Displays an insight when an application or connection is not used for the last 60 days or at all. Such apps and connections can be deprecated to reduce costs and avoid potential attacks that can occur due to abandoned entry points to your org.

Suspicious Access

Displays an insight when the organization is being accessed from a suspicious IP address detected by our AI. Sometimes this access is legitimate, such as for remote work, but it could also signal stolen login credentials and should be investigated by admins.

Misconfiguration

Displays an insight when security has been weakened by user configuration, for example, if a guest account is opened to the World via APEX REST API. Misconfigurations can lead to unauthenticated users exploiting APIs to gain access to sensitive data.

Failed Login

Displays an insight when the user - technical or real - is not able to login. In case of end users, this is likely just human error, but in the case of integration users, it could indicate faulty credentials or attempted unauthorized access. In the case of integration users, check if the integration is using outdated or incorrect login credentials and update them if required.

Low Reputation

Displays an insight when the service or application connecting cannot be verified to have a mature security posture. The security posture is calculated by Valo based on publicly available information about service or application.

Recent Breach

Displays an insight when there was a data breach in one of the SaaS services being used by the organization and could potentially compromise access credentials.

Insecure Authentication

Displays an insight when the authentication method used is obsolete or risky. This should be investigated immediately as attackers could potentially exploit weaker or deprecated OAuth methods to impersonate users or gain unauthorized access. In case of third-party services admins will need to contact the vendor to make the change in their product.

FAQs

What can Valo access in my Salesforce?

Valo is designed to only access the meta-data of your Salesforce org. Hence, Valo does not have access to any of your customer data in Salesforce. You can review our privacy policies on our website, www.valo.ai.

Is Valo approved, reviewed and security tested by Salesforce?

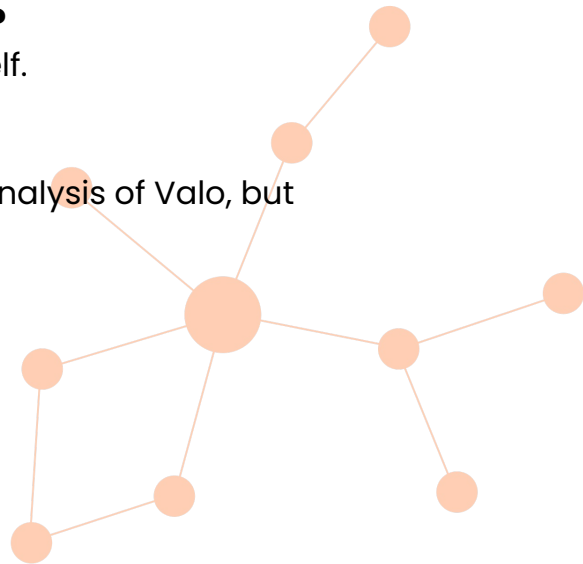
Valo has been approved, reviewed and tested by the Salesforce team itself.

Do I need Shield or Event Monitoring to use Valo?

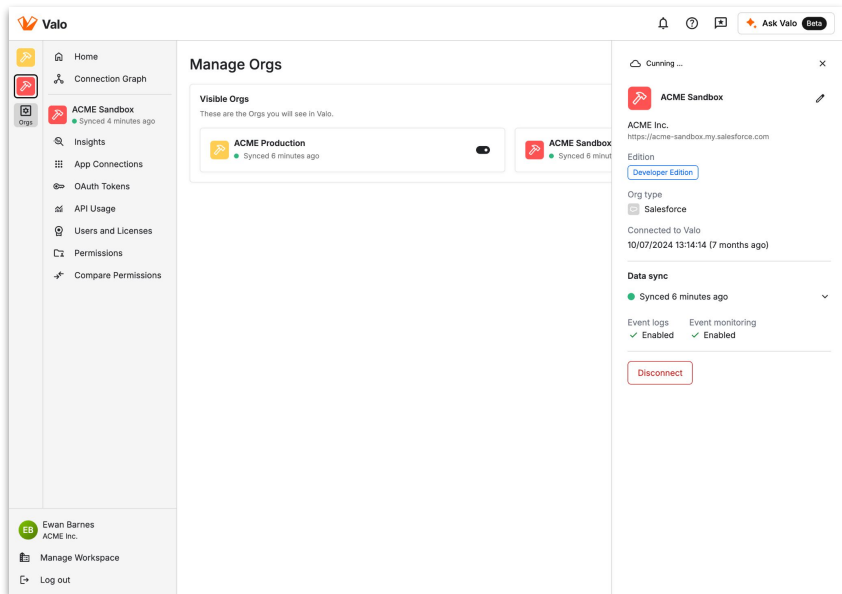
No. However, having Event Monitoring enabled will enhance some of the analysis of Valo, but most of the functionality works without it



For additional FAQs, visit the product page on our website.



What if I want to disconnect my Salesforce Org from my Valo Workspace?



We hope the disconnection is temporary and you'll be back in the Valo Workspace soon! If it's within 90 days, it will be faster to restart with your data.

Disconnect your Salesforce org from Valo workspace

How? Navigate to the gear icon on the left-hand menu bar. Now you can view all your existing orgs in Valo. Click on any org > click on Disconnect to proceed.



Disconnecting will remove the Org and its integration data from Valo. **All your data will be deleted from Valo databases in the next 90 days.** If you decide to connect your org again within the 90 day period, we can simply re-sync your data to your Workspace.



A Crucial Message for Salesforce Teams: How hackers view your Salesforce landscape

With recent security changes affecting connected apps in the Salesforce ecosystem, it's more important than ever to understand how these updates impact your organization.

Valo's CTO and co-founder **Mika Ståhlberg** gave a keynote to walk you through the recent threat landscape, explain why these changes are happening, and detail the steps you can take to keep your org safe.





**Watch Tech Talk to
understand more
about user access
management in
Salesforce.**

A screenshot of a video player interface. The title 'Tech Talk: Valo.ai' is at the top in orange. Below it, the main title 'The Access Control Dilemma: User Management Challenges & Solutions' is displayed in blue. In the top right corner, there are three small video thumbnails showing participants. At the bottom left, the Valo and Salesforce logos are visible. At the bottom right, there is a dark blue sidebar with three icons and labels: 'Discover' (magnifying glass), 'Observe' (heart), and 'Resolve' (wrench).

Tech Talk: Valo.ai

**The Access Control Dilemma:
User Management
Challenges & Solutions**

Valo Salesforce

Discover
Observe
Resolve



CONGRATULATIONS!

Your Quick Start is Complete!

We hope you enjoy using Valo.



To provide feedback to our product team,
contact us at support@valo.ai

