

Einstein Platform Security, Privacy and Architecture

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Salesforce's Corporate Trust Commitment

Salesforce is committed to achieving and maintaining the trust of our customers. Integral to this mission is providing a robust security and privacy program that carefully considers data protection matters across our suite of services, including protection of Customer Data as defined in Salesforce's [MSA](#).

Services and Features Covered

This documentation describes the architecture of the security- and privacy-related audits and certifications received for, and the administrative, technical, and physical controls applicable to, the services and features provided by Salesforce that are branded as follows (collectively, for the purposes of this document, the "Covered Services"):

- **The Covered Services branded as Agentforce (collectively, "Agentforce"), which includes the following features:**
 - **Agentforce Assistant¹**
 - **Agentforce Employee Agent**
 - **Agentforce Sales Coach**
 - **Agentforce SDR**
 - **Agentforce Service Agent**
 - **Agentforce for Flow (formerly, Einstein for Flow)**
 - **Agentforce Voice**
- **Einstein Bots²**
- **Einstein Copy Insights**
- **Einstein Conversation Insights³**
- **Einstein for Platform, which includes the following features:**
 - **Prompt Builder**
 - **Einstein for Formulas**
 - **Field Generation**
 - **Agentforce for Flow (formerly, Einstein for Flow)**
- **Einstein for Sales⁴, which includes the following features:**
 - **Prompt Builder**
 - **Einstein for Formulas**
 - **Field Generation**
 - **Einstein GPT for Sales**
 - **Sales Cloud Einstein**
 - **Contracts AI**
 - **Transaction Disputes**

¹ Formerly known as Einstein Copilot

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³ Formerly known as Einstein Call Coaching, and is available both as its own Service and as a feature of Sales Engagement.

⁴ The Services branded as Einstein for Sales and Einstein for Services include the Covered Services Sales Cloud Einstein and Service Cloud Einstein, respectively. Sales Cloud Einstein and Service Cloud Einstein have separate security, certification, and infrastructure disclosures as noted in this document and the [Infrastructure and Subprocessors](#) documentation.

- Automatic Contact Enhancements
- Sales Signals
- Generative Conversation Insights
- Agentforce for Flow (formerly, Einstein for Flow)
- Einstein for Service, which includes the following features:
 - Prompt Builder
 - Einstein for Formulas
 - Field Generation
 - Einstein GPT for Service
 - Service Cloud Einstein
 - Contracts AI
 - Transaction Disputes
 - Surveys AI
 - Knowledge Creation
 - Agentforce for Flow (formerly, Einstein for Flow)
- Einstein for Field Service, which includes the following features:
 - Pre-Work Brief
 - Post-Work Summary
 - Schedule Summary
 - Mobile Copilot
 - Onsite Knowledge Search
 - Dispatcher Desktop Copilot
 - Service Notes
 - Next Best Action
 - Recommendation Builder
 - Einstein for Service Innovations
 - Einstein for Service, in part
- Einstein GPT for Sales, which includes the following features:
 - Call Explorer
 - Call Summaries
 - Sales Emails
 - Sales Summaries
- Einstein GPT for Service, which includes the following features:
 - Work Summaries
 - Service Replies
 - Search Answers⁵
- Einstein GPT for Commerce
- Einstein Prediction Builder (included in CRM Analytics⁶ Plus and Einstein Prediction)
- Einstein Vision and Language
- Einstein Vision for Social Studio
- Sales Engagement (formerly High Velocity Sales)
- Sales Cloud Einstein, which includes the following features:
 - Einstein Account Insights;
 - Einstein Automated Contacts;
 - Einstein Forecasting;

⁵ Also included in certain Einstein 1 Editions.

⁶ CRM Analytics refers to Services formerly branded as Tableau CRM.

- Einstein Opportunity Insights;
- Lead Scoring;
- and the features listed below and designated as part of Sales Cloud Einstein
- **Salesforce Inbox**
- **Service Cloud Einstein, which includes the features listed below and designated as part of Service Cloud Einstein**
- **Einstein Activity Capture⁷ feature, Einstein Opportunity Scoring feature, Einstein Deal Insights feature, and Account Intelligence feature as part of Sales Cloud. These features are also included in the Covered Service branded as Sales Cloud Einstein.**
- **Sales Cloud Einstein feature as part of Sales Cloud and CRM Analytics**
- **Salesforce Inbox feature, Sales Engagements feature, and Einstein Conversation Insights feature as part of Sales Cloud⁸**
- **Einstein Bots feature, Einstein Case Classification feature, Einstein Case Wrap-Up feature, Einstein Reply Recommendation feature, and Einstein Article Recommendations feature as part of Service Cloud. These features are also included in the Covered Service branded as Service Cloud Einstein⁹.**
- **Einstein Object Detection feature as part of the Consumer Goods Cloud Service**
- **Einstein Prediction Builder feature¹⁰ as part of Sales Cloud, Service Cloud, or Lightning Platform.**
- **Einstein Recommendation Builder feature as part of Lightning Platform**
- **Intelligent Forecasting Machine Learning feature as part of Workforce Engagement Management.**
- **Einstein for Marketing Cloud Account Engagement feature as part of Marketing Cloud Account Engagement (formerly branded as Pardot).**
- **Einstein Conversation Mining feature as part of Service Intelligence.**
- **Pre-Work Brief and Proactive Asset Service & Sales features as part of Field Service - Einstein 1 Edition.**
- **Customer Experience Intelligence feature of Service Cloud.**
- **ApexGuru and Agentforce for Scale features of Scale Center.**
- **Agentforce Vibes (f/k/a Agentforce for Developers).**
- **Other Einstein Generative AI Services for [Salesforce Industries Clouds](#).**

This documentation does not apply to Einstein-branded services or features unless listed above.

Covered Services Accessed Through Other Services

With the exception of Einstein Vision and Language—which is accessed directly via the Einstein.ai API—the Covered Services run across two different infrastructures, each described in separate Documentation as referenced in the table below. Customers access a Covered Service’s backend data science infrastructure, such as Sales Cloud Einstein, through another Service (an “Underlying Service”) such as Sales Cloud. This Documentation describes the back-end infrastructure used by an Underlying Service to store and process Customer Data for data science. The Underlying Service, including the data stored on the Underlying

⁷ Einstein Activity Capture is available as Einstein Activity Capture for Financial Services Cloud as features of Financial Service Cloud Unlimited Edition and related SKUs.

⁸ Sales Cloud Einstein, Salesforce Inbox, Sales Engagement, and Einstein Conversation Insights are available both as their own Services, and as features included in certain Sales Cloud and related SKUs.

⁹ Agentforce IT Service leverages Case Classification, which is part of Service Cloud.

¹⁰ The Einstein Prediction Builder Security, Privacy, and Architecture Documentation applies to the Einstein for Nonprofits feature.

Services, the predictions written back to the Underlying Service, and User’s login to the Underlying Service, remains subject to the Underlying Service’s Documentation, available [here](#).

Covered Service	Underlying Service Documentation
Agentforce Voice Agentforce Service Agent Einstein Bots Service Cloud Einstein Einstein for Service Einstein GPT for Service	Salesforce Services Documentation, specifically those terms that apply to Service Cloud Messaging Documentation (Agentforce Service Agent & Einstein Bots only)
Einstein Copy Insights	Marketing Cloud Documentation, specifically those terms that apply to “ExactTarget” and “Marketing Cloud Einstein ”
Einstein Prediction Builder Einstein for Platform ApexGuru Agentforce for Scale Agentforce Vibes (f/k/a Agentforce for Developers)	Salesforce Services Documentation
Einstein Vision and Language	N/A
Einstein Vision for Social Studio	Social Studio Documentation
Einstein for Marketing Cloud Account Engagement (formerly Pardot Einstein)	Account Engagement (formerly Pardot) Services Documentation
Sales Cloud Einstein	Salesforce Services Documentation, specifically those terms that apply to Sales Cloud and CRM Analytics
Agentforce SDR Agentforce Sales Coach Salesforce Inbox Sales Engagement Einstein Conversation Insights Einstein for Sales Einstein GPT for Sales	Salesforce Services Documentation, specifically those terms that apply to Sales Cloud
Einstein for Field Service Pre-Work Brief	Salesforce Services Documentation, specifically those terms that apply to the Salesforce Field Service managed package ("FSMP"), which is a feature of Service Cloud.
Proactive Asset Service & Sales	Salesforce Services Documentation, specifically those terms that apply to the Salesforce Field Service

	managed package ("FSMP"), which is a feature of Service Cloud, and CRM Analytics. Salesforce Data 360 (fka Salesforce Data Cloud) Documentation
Customer Experience Intelligence	Salesforce Services Documentation, specifically those terms that apply to Service Cloud

Architecture and Data Segregation

The Covered Services are operated in a multitenant architecture that is designed to segregate and restrict Customer Data access based on business needs. The architecture provides an effective logical data separation for different customers via unique ID. Additional data segregation is ensured by providing separate environments for different functions, especially for testing and production. Further, except for Einstein Vision and Language, the architecture allows the use of customer and user role-based access privileges.

The specific infrastructure used to host Customer Data is described in the “Infrastructure and Sub-processors” documentation for the Covered Services is available [here](#).

Control of Processing

Salesforce has implemented procedures designed to ensure that Customer Data is only processed as instructed by the customer, throughout the entire chain of processing activities by Salesforce and its sub-processors. In particular, Salesforce and its affiliates have entered into written agreements with their sub-processors containing privacy, data protection and data security obligations that provide a level of protection appropriate to the processing activities provided by them. Compliance with such obligations as well as the technical and organizational data security measures implemented by Salesforce and its sub-processors are subject to regular audits.

The “[Infrastructure and Sub-processors](#)” documentation describes the sub-processors and certain other entities material to Salesforce’s provision of the Covered Services. As described in this documentation, Amazon Web Services, Inc. (“AWS”) provides architecture that supports the provision of the Covered Services.

Audits and Certifications

The Covered Services undergo security assessments by internal personnel and third parties, which include infrastructure vulnerability assessments and application security assessments, on at least an annual basis.

The following security- and privacy-related audits and certifications are applicable to one or more of the Covered Services, as described below¹¹:

- **APEC Privacy Recognition for Processors (PRP):** Customer Data submitted to the Covered Services is within the scope of Salesforce's PRP certification under the APEC Privacy Framework. The current certification is published in the PRP Compliance Directory at <http://cbprs.org/compliance-directory/prp/>.

¹¹ The following audits and certifications applicable to Agentforce generally are not applicable to Agentforce for Scale or Agentforce Vibes.

- **EU and UK Binding Corporate Rules (BCR) for Processors:** Customer Data submitted to the Covered Services is within the scope of the Salesforce EU and UK BCR for Processors. The most current versions of the Salesforce EU and UK BCR for Processors are available on Salesforce’s website, currently located at <https://www.salesforce.com/company/privacy/>.
- **Data Privacy Framework Certifications:** Customer Data submitted to the Covered Services is within the scope of annual certifications to the EU-US Data Privacy Framework, UK Extension to the EU-US Data Privacy Framework, and Swiss-US Data Privacy Framework as administered by the US Department of Commerce and further described in our [Notice of Certification](#). The current certifications are available at <https://www.dataprivacyframework.gov/s/> by searching under “Salesforce.”
- **ISO 27001/27017/27018 certification:** Salesforce operates an information security management system (ISMS) for Agentforce, Salesforce Inbox, Einstein Activity Capture, Einstein Bots, Einstein Prediction Builder, Einstein Case Classification, Einstein Case Wrap-up, Einstein Recommendation Builder, Einstein Reply Recommendations, and Einstein Vision and Language in accordance with the ISO 27001 international standard and aligned to ISO 27017 and ISO 27018. Salesforce has achieved ISO 27001/27017/27018 certification for its ISMS from an independent third party.
- **ISO 42001:** Agentforce and Einstein (AI Platform) are certified under the [ISO 42001](#) accreditation. ISO/IEC 42001 is an international standard for Artificial Intelligence Management Systems (AIMS), providing a structured framework for organizations to establish, implement, maintain, and continually improve responsible AI practices. It is designed for entities that develop or use AI-based products and services, ensuring ethical, transparent, and accountable AI operations.
- **System and Organization Controls (SOC) reports:** Salesforce’s information security control environment applicable to Agentforce, Einstein Prediction Builder, Einstein Case Classification, Einstein Case Wrap-up, Einstein Bots, Einstein Recommendation Builder, Einstein Reply Recommendations, and Einstein Vision And Language undergoes an independent evaluation in the form of SOC 2. Salesforce’s most recent SOC 2 reports are available upon request from your organization’s Salesforce account executive.
- **TRUSTe certification:** Salesforce’s [Website Privacy Statement](#) and privacy practices related to the Covered Services are assessed by TRUSTe annually, for compliance with TRUSTe’s Certification and Verification Assessment Criteria. For more information on the status of Salesforce's certification/verification status, click [here](#).
- **Information System Security Management and Assessment Program (ISMAP):**The Covered Services are registered in ISMAP, a program that was established to assess and register cloud services that meet security criteria defined by the Japanese government. This audit is undertaken annually. The services covered by ISMAP are Case Classification and Einstein Prediction Builder.
- **Information Security Registered Assessors Program (IRAP):** The following Covered Services are registered in IRAP, managed by the Australian Cyber Security Centre (ACSC), which enables government agencies to confidently adopt cloud services that meet rigorous security standards: Agentforce, Contracts AI, Einstein Article Recommendations, Einstein Bots, Einstein Case Classification, Einstein Case Wrap-up, Einstein Conversation Mining, Einstein for Field Service AI (Pre Work Brief), Einstein for Formulas, Einstein GPT for Commerce, Einstein GPT for Sales, Einstein GPT for Service, Einstein Prediction Builder, Einstein Recommendation Builder, Einstein Reply Recommendations, Einstein Vision and Language, Field Generation, Knowledge Creation, Prompt Builder, Surveys AI, and Transaction Disputes.

Information about security and privacy-related audits and certifications received by AWS, including information on ISO 27001 certification and Service Organization Control (SOC) reports, is available from the [AWS Security Website](#) and the [AWS Compliance Website](#).

Security Controls

With the exception of Einstein Vision and Language, the Covered Services covered by this Security, Privacy and Architecture Documentation remain subject to other documentation as set forth in the chart above.

Security Policies and Procedures

Access to Einstein Vision and Language is via API and requires a valid API key/secret/token which is encrypted via TLS while in transmission. Einstein Vision and Language are operated in accordance with the following procedures to enhance security:

- Org IDs are assigned to ensure that activities can be attributed to the responsible account.
- Einstein Vision and Language does not use any Customer-defined username or password, authentication is key-based; and
- User access log entries will be maintained, containing date, time, and partial URL.

With the exception of Einstein Vision and Language, which is accessed via the Einstein.ai API, the only User or Administrator access to each of the Covered Services is pursuant to another Service. Accordingly, the Security Policies and Procedures for each such Covered Service remains subject to other documentation as set forth in the “Covered Services Accessed Through Other Salesforce Services” section above.

Further information about security provided by AWS is available from the [AWS Security Website](#), including [AWS’s overview of security processes](#).

Intrusion Detection

For Salesforce Inbox (including the Einstein Activity Capture component), Salesforce, or an authorized independent third party, will monitor Salesforce Inbox for unauthorized intrusions using multiple detection mechanisms. Salesforce may analyze data collected by users' web browsers (e.g., device type, screen resolution, time zone, operating system version, browser type and version, system fonts, installed browser plug-ins, enabled MIME types, etc.) for security purposes, including to prevent fraudulent authentications, and to ensure that Salesforce Inbox functions properly.

With the exception of Einstein Vision and Language, which is accessed via the Einstein.ai API, the only User or Administrator access to each of the Covered Services is pursuant to another Service. Accordingly, the Intrusion Detection for each such Covered Service remains subject to other Documentation as set forth in the “Covered Services Accessed Through Other Services” section above.

Security Logs

Salesforce systems used in the provision of the Covered Services log information to their respective system log facilities or a centralized logging service (for network systems) in order to enable security reviews and analysis.

Incident Management

Salesforce maintains security incident management policies and procedures. Salesforce notifies impacted customers without undue delay of any unauthorized disclosure of their respective Customer Data by Salesforce or its agents of which Salesforce becomes aware to the extent permitted by law.

User Authentication

Access to Einstein Vision and Language via an API requires an API key/secret/token, both of which are encrypted via TLS while in transmission.

Customer's access to the Covered Services is through the Underlying Services (as described herein above) and information about user authentication for such Underlying Services is available in the applicable Underlying Services' Documentation as referenced herein above.

Physical Security

Production data centers used to provide the Covered Services have systems that control physical access to the data center. These systems permit only authorized personnel to access secure areas. The facilities are designed to withstand adverse weather and other reasonably predictable natural conditions, are secured by around-the-clock guards, physical access screening and escort-controlled access, and are also supported by on-site back-up generators in the event of a power failure.

Reliability and Backup¹²

All networking components, load balancers, Web servers and application servers are configured in a redundant configuration. All Customer Data submitted to the Covered Services is stored on a primary database server that is clustered with a backup database server for higher availability. All Customer Data submitted to the Covered Services is backed up daily.

Disaster Recovery¹³

Production data centers are designed to mitigate the risk of single points of failure and provide a resilient environment to support service continuity and performance. Salesforce has disaster recovery procedures in place which provide for backup of critical data and services. A system of recovery processes exists to bring business-critical systems for Covered Services back online within a brief period of time.

Viruses

The Covered Services do not scan for viruses that could be included in attachments or other data uploaded into the Covered Services by customers.

Data Encryption

The Covered Services use industry-accepted encryption products to protect Customer Data and communications during transmissions between a customer's network and the Covered Services, including through Transport Layer Encryption (TLS).

Return of Customer Data¹⁴

During the contract term, customers may export a copy of any Customer Data made available for export through the Covered Services. Within 30 days post contract termination, customers may request return of their respective Customer Data, to the extent such Customer Data can be copied and exported from the Covered Services and the ability to export such data is generally made available to customers, by contacting their account representative. For the Covered Services, insights, reports, and scoring may be available for manual export only. Einstein Activity Capture and Salesforce Inbox do not support the export of Customer's activity data or insights generated on this activity data.

Customer Data is not made available for export through Einstein Vision and Language; however, customers may delete an entire data set submitted as Customer Data in their use of the services.

Deletion of Customer Data¹⁵

After termination of all subscriptions associated with any of the Covered Services, Customer Data submitted to the Covered Services may remain in inactive status for up to 120 days. After such period,

¹² This section does not apply to ApexGuru or Agentforce for Scale.

¹³ This section does not apply to ApexGuru or Agentforce for Scale.

¹⁴ This section does not apply to ApexGuru or Agentforce for Scale.

¹⁵ This section does not apply to ApexGuru or Agentforce for Scale.

Customer data will be overwritten or deleted within 120 days. This process is subject to applicable legal requirements. When a Customer terminates a paid subscription to Einstein Vision and Language, the Customer's subscription will continue under the free usage tier for Einstein Vision and Language, and the Customer's Data will not be deleted until the Customer terminates their subscription to Einstein Vision and Language entirely.

Without limiting the ability for customers to request return of their Customer Data submitted to the applicable Covered Services, Salesforce reserves the right to reduce the number of days it retains such data after termination of the Covered Service. Salesforce will update this Security, Privacy, and Architecture Documentation in the event of such a change.

Sensitive Data

Important: The following types of sensitive personal data (including images, sounds or other information containing or revealing such sensitive data) may not be submitted to the Covered Services: credit and debit card numbers (and any related security codes or passwords); racial or ethnic origin, political opinions, religious or philosophical beliefs, trade-union membership, and information concerning sex life.

Moreover, for all of the other Covered Services besides the Einstein OCR feature of Einstein Vision and Language, government-issued identification numbers; financial information (such as bank account numbers) may not be submitted.

For clarity, the foregoing restrictions do not apply to financial information provided to Salesforce for the purposes of checking the financial qualifications of, and collecting payments from, its customers, the processing of which is governed by the website privacy statement for the applicable Covered Service.

Additionally, for all Covered Services besides Agentforce, Einstein Article Recommendation, Einstein Bots, Einstein Case Classification, Einstein Case Wrap Up, Einstein Conversation Mining, Einstein GPT for Sales, Einstein GPT for Services, Einstein GPT for Commerce, Einstein Prediction Builder, Einstein Recommendation Builder, Einstein Reply Recommendations, Einstein Vision and Language, and Prompt Builder (collectively, the "Einstein PHI-Permitted Services"), personal health information (including images, sounds or other information containing or revealing such sensitive data) may not be submitted. For the Einstein PHI-Permitted Services, personal health information may not be submitted where Customer is a health care provider, health care clearinghouse, health plan, or an entity performing functions on behalf of such entities, except in limited circumstances where, subject to restrictions, Salesforce has expressly permitted such submission contractually.

PGSSI-S. To the extent Customer is subject to Article L.1111-8 (or any successor thereto) of the French public health code (Code de la Santé Publique), Customer shall abide by the Global Information Security Policy for the Healthcare Sector (PGSSI-S) pursuant to Article L.1110-4-1 (or any successor thereto) of the aforementioned code.

If Customer does submit personal health information or other sensitive or regulated data to those Covered Services, then Customer is responsible for ensuring that its use of the Covered Services to process that information complies with all applicable laws and regulations.

Customer shall not use Einstein Bots, Agentforce, Einstein Language, Einstein Prediction Builder, Einstein Vision, or Prompt Builder for the purposes of predicting an individual's racial or ethnic origin, political opinions, religious or philosophical beliefs, trade union membership, age, gender, sex life, sexual

orientation, criminal convictions, disability, health status or medical condition. Additionally, for Einstein Vision, Customer may not submit images of individuals for the purposes of creating or analyzing biometric identifiers, such as face prints or fingerprints or scans of eyes, hands or facial geometry.

If Customer chooses to use any of the Covered Services as part of a decision-making process with legal or similarly significant effects, Customer shall ensure that the final decision is made by a human being. Customer must take account of other factors beyond the Covered Services' recommendations in making the final decision.

Analytics

Salesforce may track and analyze the usage of the Covered Services for the purposes of security and of helping Salesforce improve both the Covered Services and the user experience in using the Covered Services. For example, we may use this information to understand and analyze trends or track which of our features are used most often to improve product functionality. Salesforce may share anonymous usage data with Salesforce's service providers for the purpose of helping Salesforce in such tracking, analysis, and improvements. Additionally, Salesforce may share such anonymous usage data on an aggregate basis in the normal course of operating our business; for example, we may share information publicly to show trends about the general use of our services.¹⁶

In addition, Salesforce may use Customer Data on an aggregate basis for purposes such as research, marketing, analysis, and benchmarking, and other purposes reasonably required to develop, deliver, and provide ongoing innovation to the Covered Services. No Customer Data consisting of personally identifiable information will be shared in this manner, nor any data that would identify customers, their users, their consumers, or any individual, company or organization. By using the Covered Services, customers consent to the use and disclosure of their Customer Data in anonymized and aggregated form.

Interoperation with Other Services

The Covered Services may interoperate or integrate with other services provided by Salesforce or third parties. Security, Privacy and Architecture documentation for services provided by Salesforce is available in the [Trust and Compliance Documentation](#). Salesforce also provides a variety of platforms and features that allow Salesforce users to learn about Salesforce products, participate in communities, connect third-party applications, and participate in pilots, testing and assessments, which are outside the scope of this documentation. Salesforce may communicate with users that participate in such platforms and features in a manner consistent with our [Privacy Statement](#). Additionally, Salesforce may contact users to provide transactional information about the Covered Services; for instance, through the Adoption Manager program or through system-generated messages, such as Chatter notifications. Salesforce offers customers and users the ability to deactivate or opt out of receiving such messages.

¹⁶ This paragraph does not apply to ApexGuru.