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# Einstein Activity Capture Security Guide

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# EINSTEIN ACTIVITY CAPTURE

Einstein Activity Capture is a productivity-boosting tool that helps keep your email and calendar aligned with Salesforce. It has two main functions. First, it captures email and events from your Microsoft or Google account and adds them to the activity timeline of related Salesforce records. This eliminates the need to manually log activities in Salesforce. Contact data is also captured and used to create email insights and recommended connections. Einstein Activity Capture also syncs events and contacts between Salesforce and your Microsoft or Google account.

The information in this guide applies to both capture and sync functionality except where noted.

Einstein Activity Capture also includes tools to summarize sales activities that were added to Salesforce manually and captured by Einstein Activity Capture. The Activities dashboard breaks down data with various charts and filters. Activity Metrics lets you use activity data with Salesforce platform capabilities, such as triggers and list views.

Complete information, including setup steps, limitations, and details about how the feature works, is available in [Salesforce Help](#).



**Note:** In Salesforce documentation, the term *capture* refers to when Salesforce gathers data (also known as crawling data) and to the process Einstein Activity Capture adds emails and events to the activity timeline of related Salesforce records.

## EDITIONS

Available in: Lightning Experience

Available with Sales Cloud in: **Essentials, Professional, Enterprise, Performance,** and **Unlimited** Editions

Available with Sales Cloud Einstein, which is available for an extra cost in: **Enterprise, Performance,** and **Unlimited** Editions

Available with Inbox, which is available for an extra cost in: **Professional, Enterprise, Performance,** and **Unlimited** Editions

Available with High Velocity Sales, which is available for an extra cost in: **Enterprise, Performance,** and **Unlimited** Editions

# ACCESS, AUTHENTICATION, AND AUTHORIZATION

## Access

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For a user's emails and events to be captured and synced, the user must be assigned to one of the permission sets that includes Einstein Activity Capture. For details, see [Select Who Can Use Einstein Activity Capture](#) in Salesforce Help.

For a user's events and contacts to be synced, an admin must also add the user to an Einstein Activity Capture configuration with syncing enabled. For details, see [Create a Configuration for Einstein Activity Capture](#) in Salesforce Help.

## Org Provisioning

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When Einstein Activity Capture is enabled in an org, a corresponding Einstein Activity Capture org is created on Salesforce's Amazon Web Service (AWS) servers. The integration between Salesforce and AWS is authenticated through an encrypted private key. When Einstein Activity Capture makes API calls to AWS, the org-specific key is required.

## Authentication

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The choices of how to connect and authenticate users' email and calendar application depend on which email and calendar application you use. In all cases, the connection allows Salesforce to:

- Read, send, delete, and manage users' email.
- View the files in users' Google drive, if applicable.
- Manage users' contacts.
- Manage users' calendar.

### User-Level

The user-level authentication method is available for Google, Microsoft Exchange, and Microsoft Office 365. After users are assigned to Einstein Activity Capture, they're prompted to accept the terms and service and connect a Google or Microsoft account to Salesforce.

For Gmail and Office 365, users authorize the data to be fetched from their email service using the OAuth 2.0 protocol. For Exchange 2013 and 2016, users authorize the data to be fetched from their email service using basic authentication.

### Org-Level

The org-level authentication method is available for only Microsoft Office 365. The Salesforce admin works with their Exchange admin to give Salesforce access to data in Microsoft Office 365. The connection applies to all users in Salesforce. The org-level authentication lets the admin set up all Einstein Activity Capture users at the same time. Admins authorize the users' data to be fetched from their email service using the OAuth 2.0 protocol.

### Service Account

The service account authentication method is available for only Microsoft Office 365. The Salesforce admin works with their Exchange admin to create a service account with the impersonation role and give Salesforce access to the service account user's data. By using a service account, the admin can scope authentication to a specific set of users and set up all Einstein Activity Capture users at the same time. Admins authorize the users' data to be fetched from their email service using the OAuth 2.0 protocol.

# EINSTEIN ACTIVITY CAPTURE DATA FLOW

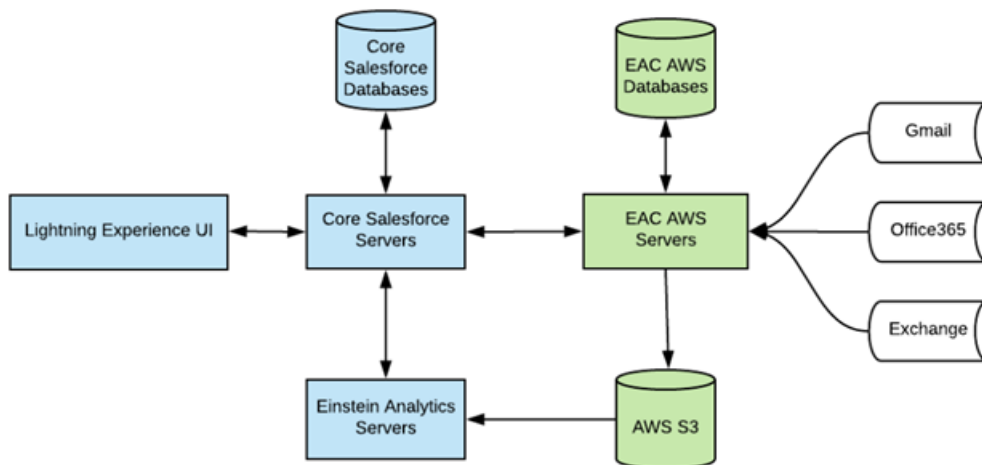
## Capture

When email, event, or contact data is captured, the data follows the same flow from the user's email account to Salesforce, regardless of which email service is connected to Salesforce. First, Salesforce AWS servers capture the data. Then, the email and event data is fetched from AWS to display on the activity timeline of related Salesforce records. Contact data is used by other Salesforce features, such as Einstein Email Insights and Recommended Connections. Finally, the activities' metadata is stored in the core Salesforce servers.

## Sync

When events sync, the event data and metadata is stored in AWS servers and the core Salesforce servers, regardless of which email service is connected to Salesforce. Event records are created and stored in the core Salesforce servers.

When contacts sync, the contact data is stored in only the Salesforce servers, regardless of which email service is connected to Salesforce. AWS servers don't store any contact data that comes from the syncing process.



# HOW DATA IS STORED AND USED

Inbox and Einstein Activity Capture can be used together or separately. However, the way each feature captures, stores, and uses data is the same.

Either Inbox or Einstein Activity Capture initiates the data capturing, which is the process for gathering data. The data is stored on the Salesforce AWS servers and databases, which are hosted by Amazon Web Services behind an AWS Virtual Private Cloud (VPC). The data is used by either Inbox, Einstein Activity Capture, or both to bring productivity-boosting tools to assigned users.

Learn more about [Salesforce Inbox](#).

Review details about what data is captured and stored, and how the data is used.

What's captured and stored by AWS	Details	How data is used
Calendar events	Event data comes from users' connected Microsoft or Google accounts. Calendar events aren't encrypted.	Einstein Activity Capture uses the data to display events in the activity timeline and the Salesforce calendar.  Inbox uses the date for the Insert Availability and Recommended Connections features.
Contact details	Contact data comes from what's displayed in the Contact Profile screen (from Gmail, Exchange, Sales Cloud). The data is stored for a few days.	The data isn't currently used by Einstein Activity Capture or Inbox.
Email accounts	Includes details about users' connected Microsoft or Google accounts, including email address, server, and domain	Einstein Activity Capture and Inbox use the data to connect users' email accounts to Salesforce.
Email attachments	Includes the metadata for email attachments. For Einstein Activity Capture, the attachments themselves aren't stored or shown on the activity timeline.  For Inbox, the Send Later feature stores the attachments until the email is sent.  During the Inbox email send action, attachments can be Email Attachments dynamically fetched from the Google or Exchange server by passing the email message ID.	Einstein Activity Capture doesn't currently use the attachment metadata.  Inbox uses the attachments and metadata for the Send Later feature.
Email headers and metadata	Includes email messages from users' connected Microsoft or Google accounts. The email elements that are stored include: Subject, From, To, CC, and sent date.	Einstein Activity Capture uses the data to add emails to the activity timeline of related Salesforce records.  Email Insights (available with both Inbox and Einstein Activity Capture) uses the data to create classifications.



## How Data Is Stored and Used

What's captured and stored by AWS	Details	How data is used
		Recommended Connections (available with both Inbox and Einstein Activity Capture) uses the data to generate suggestions.
Email HTML bodies		Einstein Activity Capture uses the data to display emails in Salesforce. The data is also used to generate email insights.
Passwords and OAuth tokens	<p>Includes the OAuth refresh and access tokens used to connect users' Google or Microsoft accounts to Salesforce.</p> <p>When users connect their account to Salesforce with OAuth 2.0, we don't store users' passwords. Therefore, if users change their email password after connecting their account to Salesforce, they don't have to reauthenticate against Google or Microsoft.</p> <p>For users that use an on-premises Exchange email accounts that use password authentication, we do store the password.</p>	
Salesforce records	Includes metadata (such as permissions, fields, and page layouts) for records such as contacts, leads, and opportunities. Data is stored for up to 24 hours.	<p>Inbox mobile app (not the Inbox desktop version) uses the data to improve performance when looking up records related to an email or event.</p> <p>Einstein Activity Capture also copies email addresses from contact and lead records and stores them on AWS servers. This helps associate emails to related Salesforce records.</p>
User settings	Includes the Inbox or Einstein Activity Capture user's personal settings.	

# ENCRYPTION

Einstein Activity Capture doesn't support platform encryption, so emails and events that are added to Salesforce with Einstein Activity Capture aren't encrypted. When platform encryption is enabled for your org, emails and events associated with Salesforce records don't show the names of encrypted contacts and leads.

For captured emails and events, all email and event data stored in AWS is encrypted at rest using AES-256 server-side encryption.

For synced events and contacts, [Salesforce utilizes Transport Layer Security \(TLS\) technology](#) to protect transferred data. During authorization of each transaction, Salesforce requires the TLS configuration from the data received to meet Salesforce TLS security requirements before granting access.

All data accessed between the user's email account and Salesforce, and between Salesforce and AWS is done through secure protocols like https, TLS. Data stored on Salesforce AWS is also encrypted at rest. All data accessed between client and server also requires API access tokens for each user that are encrypted and can be revoked on demand.

# DATA PRIVACY

 **Note:** Unless stated otherwise, the following information applies only to captured data, not synced data.

Einstein Activity Capture includes several ways to ensure that data is captured, stored, and shared the way users want.

## Share Emails and Events

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Users can control how activities that were added to Salesforce by Einstein Activity Capture are shared with other Salesforce users at your company. Einstein Activity Capture users can share with all users, with up to 20 private and unlisted Chatter groups, or with no one. Users can also set sharing for individual emails or events. The admin sets the default sharing setting, but users can override it by setting their individual sharing. The user's setting is applied to all emails and events, except those that they set individually. However, if the admin sets the default sharing setting to Don't Share, they can choose to prevent users from changing it. In that case, users can't set their individual sharing.

Some Sales Cloud Einstein features use emails captured by Einstein Activity Capture—including emails that aren't shared—to generate business-related insights. However, the content of the emails and the usernames associated with them are hidden. Einstein Opportunity Insights, Einstein Account Insights, and Einstein Automated Contacts are the Sales Cloud Einstein features that use these private emails.

For more information, see [Control How Activities Added by Einstein Activity Capture Are Shared](#) in Salesforce Help.

## Exclude Email Addresses

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Admins and end users can exclude emails and events from being added to Salesforce. When an email address or domain is added to the Excluded Addresses list, email and events associated with the person or company aren't added to the activity timeline of related Salesforce records. And events aren't synced between Salesforce and the connected accounts. However, the emails and events are still stored in AWS.

The org-wide Excluded Addresses list, which the admin creates, can include domains and email addresses. Users can add more email addresses to their own Excluded Addresses list.

For more information, see [Considerations for Excluding Data from Einstein Activity Capture](#) in Salesforce Help.

## Delete Data

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Admins can honor their customers' requests to delete their personal data in Salesforce email and events. When activities are deleted, they're removed from AWS and from the activity timeline. Activities can be deleted based on email address or username. We process the request after seven days, and it can take up to a month to complete the request.

The data isn't removed from Salesforce or from the email services, so admins might need to delete the data from those locations too.

For more information see, [Delete Email and Events Logged by Einstein Activity Capture](#) in Salesforce Help.

## Exclude Data from Machine Learning

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Admins can honor their customers' requests to exclude their personal data from factoring into machine learning models. Salesforce processes the request after seven days and it can take up to a month to complete the request.

For more information, see [Exclude People's Personal Data from Modeling and Data Enrichment](#) in Salesforce Help.

# DATA STORAGE AND RETENTION

 **Note:** The following information applies only to captured data, not synced data.

Einstein Activity Capture data is stored in the Salesforce AWS server and, therefore, doesn't affect Salesforce data allocations. There's no additional costs for this storage. The license that's used to access Einstein Activity Capture determines the data retention policy. If an org has at least one Sales Cloud Einstein, High Velocity Sales, or Inbox license, the data retention policy for that license applies to the entire org.

When a *new* Microsoft or Google account is connected to Salesforce, the amount of historical data that's captured and stored by the Salesforce AWS Servers is 6 months (up to 50k emails and 5k events).

Then, AWS servers use notification subscriptions from the email service to capture new email messages and events. The default amount of data stored *over time* on AWS ranges from 6 to 24 months, depending on which Salesforce license is used to access Einstein Activity Capture. Admins can contact Salesforce Customer Support to change the storage amount.

After the data retention period has passed, the data is removed from the system. For example, if the data retention period is 24 months, then any activity that occurred more than 24 months ago (regardless of when it was added to Salesforce) is deleted from the AWS server and the activity timeline. Activities captured by Einstein Activity Capture aren't archived.

For complete data retention information, see [Data Retention for Einstein Activity Capture](#) in Salesforce Help.