Routing Forensics: answers for your security reviewer

Independent, read-only lead routing checks for Salesforce and HubSpot. Everything below is what the product does today.

Where is the data hosted?

The app runs on Fly.io in London. It holds your encrypted CRM connection, the findings, counts and the audit log. It never holds your lead, contact or opportunity records.

Can it change anything in our CRM?

No. It runs as one Salesforce user holding only our read-only permission set. Before every run it proves that user cannot create, edit or delete Leads, Campaigns, Opportunities or Cases, and holds none of Modify All Data, Modify Metadata, Customize Application or Author Apex. If any of that fails, the run does not happen.

Which permissions does it need?

API access, view setup and configuration, and view roles. Read with view all records on Lead, Contact, Account, Opportunity, Campaign, Campaign Member and Case. Read on named fields. No create, edit or delete on any object. The permission set does not include the org-wide View All Data. The file is on the security page.

What do you keep?

Counts, per-person response figures, and each finding with the query that proves it. Never lead, contact or opportunity records, names, email addresses, phone numbers or free text from records.

How long do you keep it?

Results are kept for 13 months unless you choose otherwise, then deleted automatically. When an account closes, its data is deleted within 30 days.

How are CRM connection tokens protected?

They are encrypted, with the key kept apart from the database. Disconnecting cancels the login at your CRM and deletes the stored token at once.

How do people sign in?

By a single-use email link, stored only as a hash. Roles are Owner, Admin, Fixer and Viewer. Every change and every run is written to an audit log.

Who else handles data?

Resend (Ireland) sends sign-in and alert emails. Cloudflare serves the website and counts visits without cookies. Fly.io hosts the app. jsDelivr serves the engine for the browser scan. None of them receives your CRM records.

Does the free scan upload our files?

No. It runs in your browser. The export you drop on it is never uploaded, stored or sent to us.

Are you certified?

No. Routing Forensics is not SOC 2 certified and holds no security certification. The controls above are what we do today.

Who do we ask?

hello@routingforensics.com. Full detail: routingforensics.com/security, /data-we-read and /sub-processors.