Trust Center

Data, AI, security, and privacy practices

Promo Consulting, LLC | https://promoconsulting.com

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Promo CoWork's AI agents perform back-office work using the email and business systems a Customer chooses to connect. This Trust Center summarizes our data, AI, and security practices. The Terms of Service, Privacy Policy, and other documents listed below provide the full details and control if this summary conflicts with them.

Your data, your control

- As between the parties, you own the data you provide or allow Promo CoWork to access. We use it only as permitted by our agreements to provide, secure, support, and maintain Promo CoWork, follow your instructions, and comply with law. We do not sell it or use it for advertising.
- We do not use Customer Data to create, train, or improve AI models. Our AI providers are contractually prohibited from using Customer Data to train or improve their models. Where a provider offers an applicable zero-data-retention setting, we enable it so the provider keeps inputs and outputs no longer than needed to return a response.
- Each AI request contains data from only one Customer. Customer Data is kept separate, and an agent acts only through permissions configured for that Customer; it cannot access another Customer's systems.

Connected systems and email

- Promo CoWork accesses only the business mailboxes and systems that you authorize and connect, within the permissions granted, and only to run the agents you enable. You are responsible for having the rights and any notices or consents needed to connect them. Each connected system remains governed by its provider's terms.
- For Google Workspace, Promo CoWork accesses Gmail only through permissions granted by the user or the Customer's administrator. For Microsoft 365, it uses delegated Microsoft Graph permissions and can reach only mailboxes the signed-in user may open. In either service, agents may read messages and attachments in connected mailboxes and create drafts for your team to review and edit.
- An email is sent from a connected mailbox only after a person at the Customer approves it. Based on the user’s preferences, agents will move messages from the inbox to a folder within that same user’s mailbox. Promo CoWork does not delete messages or move them between mailboxes, and it does not label messages in Gmail.
- Email and document contents are treated as untrusted data. Agents do not follow instructions found inside an email or attachment.

Promo CoWork's use and transfer to any other app of information received from Google APIs comply with the Google API Services User Data Policy (https://developers.google.com/terms/api-services-user-data-policy), including its Limited Use requirements.

Human control and prohibited actions

- You choose which agents run and set their rules, tolerances, approvers, templates, schedules, and level of autonomy. Exceptions and actions outside those settings go to a person for review.

- Required approvals are never granted automatically, including when a request receives no response. AI output can be inaccurate, so you remain responsible for required review and for business decisions based on that output.
- A Customer administrator or Promo Consulting can pause an agent immediately. You may also disconnect a mailbox or system at any time; disconnection stops future access, while deletion of information already processed follows the Privacy Policy.
- Agents do not delete email, move money out of a bank account, approve their own actions, change their own settings or permissions, or act for another Customer.

Security

We use administrative, technical, and organizational safeguards designed to protect information, including access controls, encryption, multi-factor authentication, separation of Customer Data, and audit logging. No system is perfectly secure. We notify affected Customers of a security incident as required by applicable law and our agreements. System credentials must be entered on the secure Promo CoWork page, not sent by email or in documents; they are stored in encrypted form and are not displayed again.

Hosting, retention, and deletion

Promo CoWork is hosted in the United States, and service providers may process data in the locations identified on our Service Providers page. For Customers in Canada, this involves cross-border processing in the United States, where information may be subject to U.S. law. We retain each category of information only for the period stated in our Privacy Policy, including up to 30 days for email and document contents, 90 days for AI prompts and responses, two years for file metadata and access history without file contents, seven years for agent action history and security or access audit logs, and 35 days on a rolling basis for backups. Disconnecting a mailbox or system stops future access immediately. Following a deletion request, we delete information obtained from it within 30 days, except records retained for the periods stated in the Privacy Policy; ordinary backup copies expire within a further 35 days. When a Customer leaves, we turn off its agents, revoke connections, provide a data export, and delete its content, indexes, and caches. Audit logs and action history remain only for their stated retention periods.

Business documents may contain bank-account, payment-account, or payment-card information. We process those details only as needed to perform the Customer's task, such as identifying and posting a payment or processing a vendor bill. Promo CoWork does not connect to a Customer's bank account or move money from one. Documents that qualify for special handling under the Privacy Policy are not retained in persistent application document storage or application backups after the task is complete.

Access by people

Your users can access only what their assigned roles and permissions allow. Authorized Promo Consulting personnel access a Customer account only to provide support, conduct setup or testing with the Customer's approval, or operate and secure the service. That access is limited to what the task requires, time-limited, and logged for visibility to the Customer's account owner.

Incidents, errors, and concerns

To report a suspected security incident, privacy concern, or inaccurate agent result, use the applicable report or flag option in the Promo CoWork portal or email engage@promoconsulting.com.

Related policies and providers

- Privacy Policy: https://promoconsulting.com/privacy
- Terms of Service: https://promoconsulting.com/terms
- AI Data Usage Policy: https://promoconsulting.com/aidata
- Service Providers: https://promoconsulting.com/serviceproviders

Contact

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