

Security and Data Privacy

Public overview for prospective customers and security reviews. Version 2.0 (public), August 2026. Supersedes version 1.2 (June 2026).

June is a phone call your rep makes after a customer meeting. That shape is most of the security story: nothing is recorded in front of your customer, nothing is installed on anyone's device, and the finished record lands in the system you already control. Detailed, vendor-named architecture documentation is available on request at it@calljune.ai.

How CallJune works

A sales rep calls June from their own mobile after a customer meeting. No app, no login, no typing, and the customer meeting itself is never recorded or attended. The rep talks through what happened, June asks the questions their organization wants asked, and the result is written as structured data into the customer's CRM or into a shared sheet, whichever the customer chooses.

Authentication

Phone-based two-factor, evaluated before any processing begins.

- **Something you have:** the registered mobile number. Calls from unrecognized numbers are not processed.
- **Something you know:** a per-rep PIN spoken at the start of the call.

Routing happens before the conversation starts. An inbound webhook identifies the caller, resolves which customer they belong to, and determines the destination system for that customer.

How data moves

- 1 The call is placed from a registered mobile.
- 2 The voice platform, Retell AI, runs the live conversation.
- 3 On call completion, post-call orchestration hands the transcript to an AI model, which extracts it into a defined schema: the candidate fields for a company, deal, contact, task or note, each with the action attached.
- 4 The database, Supabase, stores the resulting structured work order.
- 5 The CallJune processor, hosted on DigitalOcean, maps fields and writes. Data passes through this layer and nothing is stored on it.
- 6 Destination: your CRM through its own API under OAuth, or a Google Sheet you control.

What is retained, and for how long

This is the section most reviewers care about, so it is stated plainly rather than summarized.

Data	Where it lives	Retention
Call recording and transcript	Voice platform (Retell AI)	Retained by default, indefinitely, held in the United States inside Retell's SOC 2 environment. Immediate deletion after processing is a configurable setting, applied per agent, and can be enabled for you before go-live on request. When enabled it removes both the audio and the transcript.

Data	Where it lives	Retention
Structured work order	Database (Supabase)	Structured fields only. No verbatim call content. Retained indefinitely by default. Retention windows are customer-settable and the record is deleted on request.
In-flight processing data	Application layer (DigitalOcean)	Transient. Nothing is stored on this layer.
Final structured record	Your CRM or sheet	You control retention, access and compliance.
The original sales meeting	Nowhere	Never recorded and never attended. June is only ever on a call your rep places afterward.

Two points are worth drawing out of that table. **The durable record on the CallJune side holds structured fields only, so nothing kept long term on our side contains what anyone actually said.** And retention in the voice platform exists for a reason: troubleshooting and tuning the question flow, which matters most during a pilot. Where your policy requires immediate deletion, we enable it and confirm in writing.

CRM connection

Authentication is a standard OAuth application. Your CRM administrator approves it through the CRM's own consent screen, the same pattern as signing into a third-party tool with a Google account. CallJune stores the resulting access and refresh tokens and calls the CRM API on your behalf. You can revoke the connection at any time from your side, without involving CallJune.

- **Scopes requested:** read and write on the core CRM objects, companies, contacts and deals. CRM objects only. Nothing in the CRM's automation, marketing or workflow features is touched. Read access exists so an existing record can be matched rather than duplicated.
- **Objects written:** companies, deals, contacts, tasks and notes. Writes happen on call completion, not during the call.
- **Failure handling:** a failed write is logged as a task inside your CRM stating what failed and why, and CallJune's engineering lead is alerted at the same time, so a failure surfaces on both sides rather than disappearing. Deduplication logic runs before records are created.
- **CRM support:** HubSpot is live and in production use. The Salesforce adapter is built and in testing as of August 2026 and is configured during onboarding; it is not a live native integration. June is destination-agnostic, and a shared Google Sheet is a complete destination on its own.

Infrastructure and sub-processors

System	Role	Certifications
Retell AI	Voice platform; holds the call recording and transcript	SOC 2 Type I and II, HIPAA (BAA available)
DigitalOcean	Application hosting and processing	SOC 2 Type II, ISO 27001
Supabase	Database	SOC 2 Type II, HIPAA (BAA available)
OpenAI	Transcript extraction	SOC 2 Type II, ISO 27001
Twilio	SMS reminders, where a customer has them enabled	SOC 2 Type II, ISO 27001
Google Workspace	Sheet destination, where used	SOC 2 Type II, ISO 27001

CallJune operates in the United States and customer data is held in the United States.

AI model providers

OpenAI runs the extraction and is the only AI provider in the path. No provider in the path trains on API data. The model is pinnable per customer, so a customer with a provider preference can be assigned a different one on request. That is set up before go-live and requires an API token for the provider you choose. It is not a switch that is already in place. Zero-data-retention agreements are available from OpenAI for enterprise customers.

Isolation between customers and between reps

- Authentication by mobile number plus PIN occurs before any data is accessed.
- Work orders are tagged with the caller's identity and the customer organization.
- Database access is filtered by organization ID and rep ID at every access point. Cross-organization access is not possible at the application layer.
- Where the destination is a CRM, queries are scoped to the authenticated user. Where the destination is a sheet, access is granted explicitly by named user.

What CallJune does not do

- Does not record or attend the original sales meeting.
- Does not pull your CRM data into CallJune for its own use. Read access exists to match records and prevent duplicates.
- Does not touch CRM automation, marketing or workflow features.
- Does not use customer data to train AI models.
- Does not require an app, a browser, or an internet login.
- Does not send email on your behalf.

Environments and compliance status

CallJune runs a single production environment today. Voice agents can be duplicated for staged testing. A separate staging database and processor can be stood up where your change-management process requires one. That is available on request and is not built today.

Milestone	Status
All infrastructure providers SOC 2 Type II certified	Complete
AI provider confirmed not to train on API data	Complete
Configurable retention and post-processing deletion per customer	Available, enabled on request
Per-organization and per-rep data isolation	Complete
CallJune application-layer SOC 2 Type I	In progress
CallJune application-layer SOC 2 Type II	Planned, following Type I
Separate staging environment	Available on request, not yet built

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