Option 1: Configure Salesforce to send mail through Gmail/ Office 365 and archive on Vaultastic

Overview

This method is applicable if the domain configured to send out mail on Salesforce is hosted on either Google Workspace or Microsoft 365.

In this method, Salesforce is configured to route outgoing mail via Google Workspace or Microsoft 365.

The primary mail server will then route mail via the existing ids on the domain. By configuring the mail service to journal mail to Vaultastic, you can archive the mail sent via Salesforce in addition to the normal mail communication.

To archive emails sent from Salesforce, follow the steps mentioned below.

A. Configure journaling on Google Workspace or Microsoft 365

B. Allow Salesforce users to send email through Gmail/Office 365
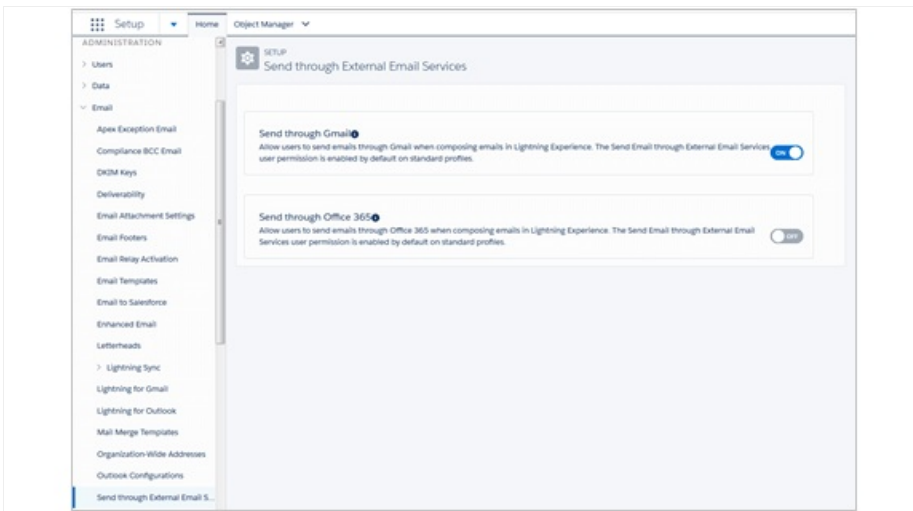
C. Confirm emails are archived on Vaultastic

A. Configure journaling on Google Workspace or Microsoft 365

If your mailing domain is hosted on Google Workspace, use the steps given here (https://docs.mithi.com/home/how-to-configure-o365-to-journal-mail-in-vaultastic).

If your mailing domain is hosted on Microsoft 365, use the steps given here (https://docs.mithi.com/home/how-to-configure-gsuite-to-journal-mail-in-vaultastic)
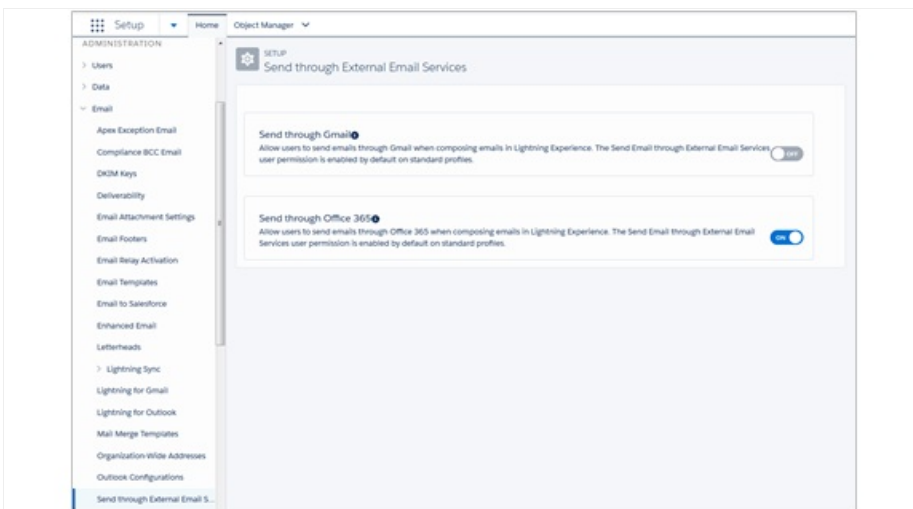
B. Configure Salesforce to allow users to send mail through Gmail/Office 365

Allow users to send email through Gmail/Office 365, their primary email solution.

If your primary email solution is GSuite, enable the option to send email through Gmail.

If your primary email solution is O365, enable the option to send email through O365.

- Go to the **Home** tab

- On the left pane, select the options **Lighting Experience** > **Send through External Email Services**

- If your primary email solution is **GSuite**, enable the option to **send email through Gmail**.

  OR

  If your primary email solution is **O365**, enable the option to **send email through O365**.

C. Confirm mails are archived on Vaultastic

All email messages sent from Salesforce through Gmail or O365 are archived in the Sent Items folder of the archive account of the sender.

Example:

- Consider Aarav is a user of the domain baya.in hosted on GSuite.

- All email sent from or received to the users of baya.in are archived on the Vaultastic domain baya-in.vaultastic.com.

- Aarav is a user of Salesforce. He has configured Saleforce to send email through his id aarav@baya.in.

- All email sent by Aarav from his Salesforce account will be archived in Vaultastic