

Step 2: Configure Salesforce to send a copy of an outgoing email to Vaultastic

If your primary email solution is other than GSuite or O365, you need to configure your Salesforce account to send a copy of an outgoing email to the Vaultastic server. This configuration is a 4 step process Viz.

- A. Add a journal user on your domain hosted on Vaultastic
 - B. Configure Salesforce to archive an outgoing email
 - C. Confirm that outgoing emails are archived on Vaultastic
-

A. Add the journal user on Vaultastic

To add the salesforce-journal user id on Vaultastic, log in to your Vaultastic admin portal.

Add a user `salesforce-journal@{domain-name}.vaultastic.com` to your Vaultastic domain.

Example:

For a domain `baya-com.vaultastic.com` hosted on Vaultastic, create a Salesforce id `salesforce-journal@baya-com.vaultastic.com`. Assign the Durability, Tracer or Hold plan to it.

B. Configure Salesforce

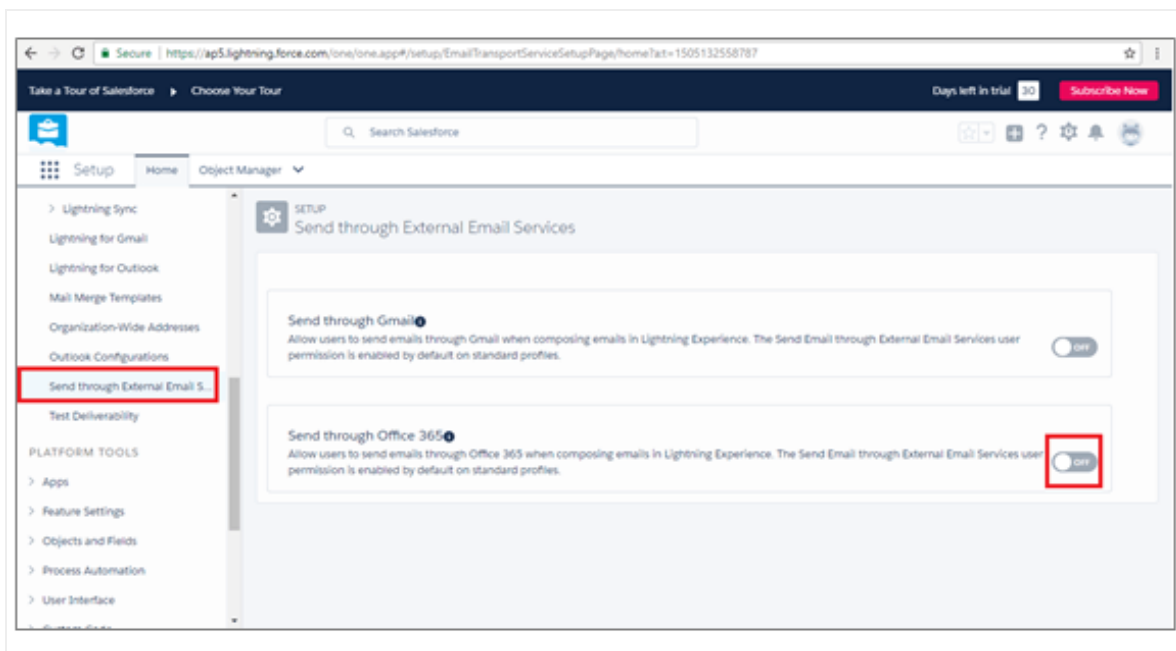
Archiving email messages sent from your Salesforce account is a three steps process. In which you need to

1. Restrict users to send email through Gmail or O365
2. Establish the connection between Salesforce and Vaultastic server using Email Relay

3. Configure compliance BCC to automatically copy each outgoing email to a compliance email address

The Compliance BCC option is available in Enterprise, Performance, Unlimited, and Developer Editions of the Salesforce application. For more details [click here \(https://help.salesforce.com/articleView?id=admin_compliancebcc.htm&type=0\)](https://help.salesforce.com/articleView?id=admin_compliancebcc.htm&type=0) .

1. Restrict users to send email through Gmail or O365

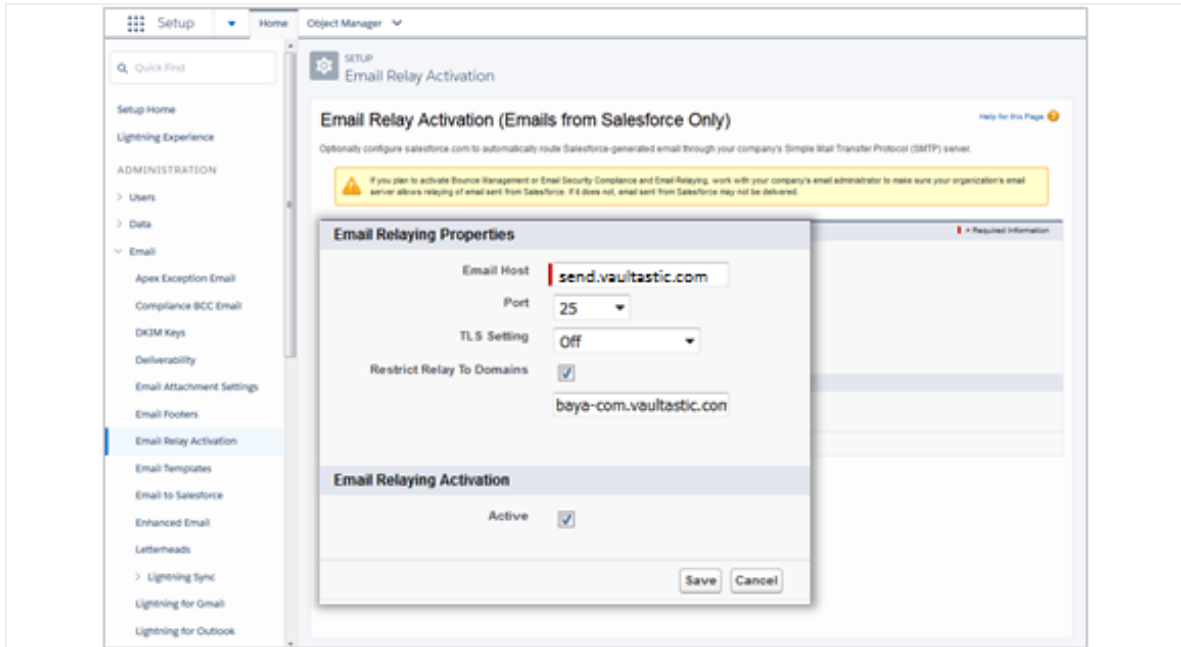


- Go to the **Home** tab
- On the left pane, select the options **Lightning Experience > Send through External Email Services**
- **Disable** the option to send email through Gmail or O365.

Please [click here \(https://help.salesforce.com/articleView?id=emailadmin_sendthroughexternal_considerations.htm&type=5\)](https://help.salesforce.com/articleView?id=emailadmin_sendthroughexternal_considerations.htm&type=5) to know what is the impact of disabling users to send email through Gmail/ O365

2. Configure Mail relay for {vaultasticdomain}

Configure email relay to automatically route salesforce-generated email to the Vaultastic server.



i. Go to the Home tab

On the left pane, under the **ADMINISTRATION** section, select the options **Email > Email Relay Activation**

ii. Configure Email Relaying Properties as follows

Example: baya-com.vaultastic.com

- In the **Email Host** box, enter the string **send.vaultastic.com**
- Enter the **Port** value **25**
- Choose the **TLS Setting** option **Off** from the list.
- Check the box **Restrict Relay to Domains**
- Enter domain name provisioned on Vaultastic

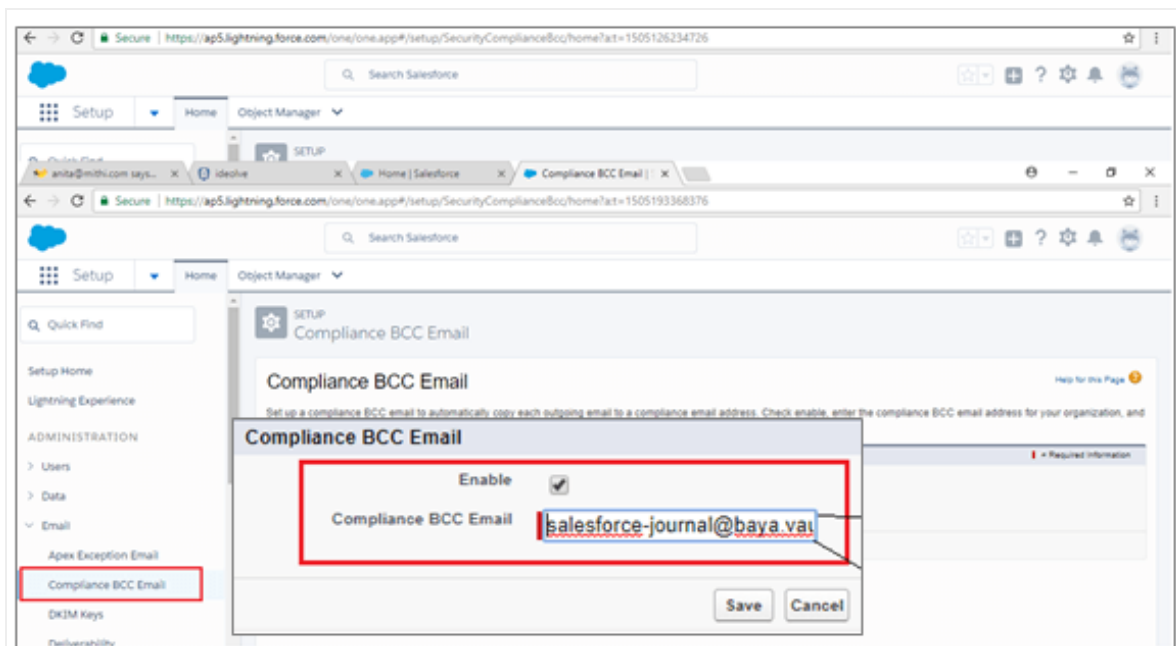
- Activate the Email Relaying settings
- Save the configuration

3. Set up Compliance BCC

Set up a compliance BCC email to automatically copy each outgoing email to a compliance email address.

- Go to the **Home** tab
- On the left pane, under the **ADMINISTRATION** section, select the options **Email > Compliance BCC Email**
- Check the **Enable** option.
- Enter the compliance BCC email address as **salesforce-journal@{domain-name}.vaultastic.com**

Example: **salesforce-journal@baya-com.vaultastic.com**
- Click **Save**.



C. Confirm outgoing emails are archived on Vaultastic

All email messages sent from Salesforce are archived in the Inbox folder of the salesforce-journal id of your domain hosted on Vaultastic.

Example:

- Consider Aarav is a user of the domain baya.in hosted on Mithi SkyConnect.
- 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.
- To archive all email sent from Salesforce, salesforce-journal@baya-in.vaultastic.com id is created on the Vaultastic domain.
- All email sent by Aarav from his Salesforce account will be archived in the Inbox folder of the Vaultastic account salesforce-journal@baya-in.vaultastic.com.

