

# Archival from Zoho Mail

## Overview

To archive email from a mail server to the Vaultastic Stores, there are two primary methods used.

1. **Archive live mail using the journaling / autobcc / forwarding feature of the primary mail server**, such that mail transacted are copied to the Vaultastic Active Store as they are transacted; before they are delivered to the user's mailbox.
2. **Pulling mail already delivered to the end user's mailbox** using API or IMAP connections to a Vaultastic Store using **LegacyFlo**.

***The first method can be enabled for your domain via a request to Zoho sales / onboarding team. Once enabled, follow the [steps given here to start live mail archival](https://docs.mithi.com/home/zoho-mail).*** (<https://docs.mithi.com/home/zoho-mail>)

***If the first method is not available to you, archiving can be achieved using the second method of pulling mail from a mailbox on Zoho.***

The configuration is as described below:

1. A mailbox is created on Zoho to receive all mail transacted by all or selected users. This mailbox will not be accessed by any end user.
2. The Zoho domain is configured to forward a copy of sent and received mail to this mailbox
3. A monthly routine is established to
  1. Copy the previous month's mail to a Vaultastic Store
  2. Delete the previous month's mail from the Zoho mailbox.

The sections below document the steps to do so.

## Pre-requisites & limitations

1. This solution will not work for users who pop mail using the POP protocol.
2. This solution will not work for already forwarded emails.
3. For the 5th step, where the data from the vaultastic id on Zoho has to be copied to Vaultastic, the IMAP access for the mailbox has to be enabled
4. Any mail deleted from the vaultastic id on Zoho will not get archived.

Reference: <https://www.zoho.com/mail/help/email-forwarding.html>

## Step 1: Create a mailbox on Zoho to receive a copy of all sent and received mail

Navigate to the Zoho admin panel and create a user called vaultastic@<your domain name on Zoho>

This step has to be done for all domains for which you wish to enable archiving.

This step has to be executed only once.

## Step 2: Configure forwarding of the Incoming mail

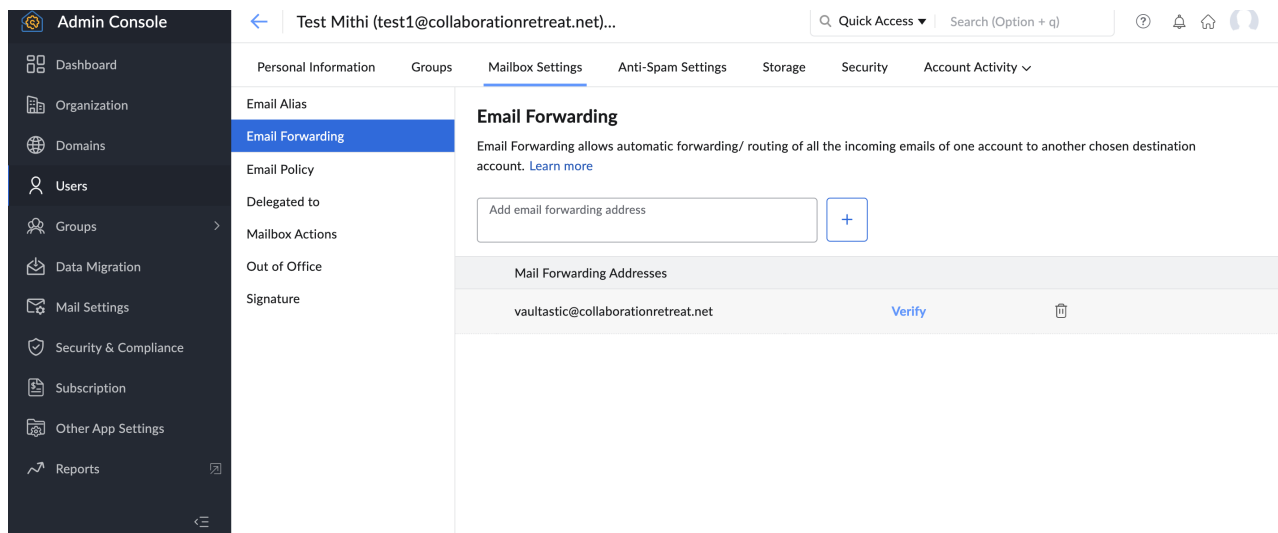
Navigate to the Zoho Admin Panel.

Select **Users** option. Select the user

From the **Mailbox Settings** tab, select **Email Forwarding**

In **Add email forwarding address**, enter **vaultastic@<your domain name>** and **click +**

The newly added address should be visible. Verify the email address.



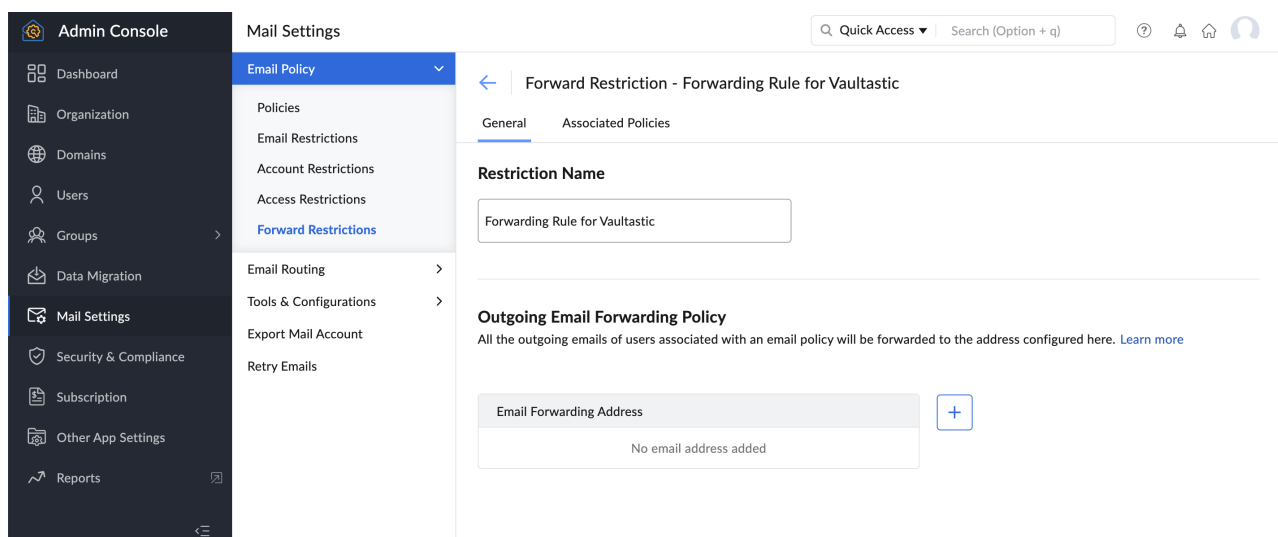
**This step has to be repeated for all users whose mail has to be archived. This operation will have to be done for new users added to the domain.**

## Step 3: Configure forwarding of the Outgoing mail

**A)** Navigate to the Zoho Admin Panel

Select **Mail Settings -> Email policies -> Forward Restrictions**

Click **Create** and give **Forwarding Rule for Vaultastic** as the **Restriction name**



In the **Outgoing Email Policy** section, click on the **+ icon** next to Email Forwarding Address

Select **vaultastic@<yourdomainname>** by clicking the **Add** button next to the ID.

Click on **Proceed**

## B) Select Mail Settings -> Email policies -> Policies

Click **Create**.

In the **General** tab, give the **Policy name Vaultastic Outgoing**

In the **Restrictions** tab, select **Forward Restriction**

**Select the Rule** created in the previous step

On the pop-up, click **Change**

The screenshot shows the Admin Console interface. On the left is a navigation sidebar with 'Mail Settings' selected. The main content area shows the 'Email Policy - Vaultastic' configuration page, with the 'Restrictions' tab active. A modal dialog box is open, titled 'Change Mail Forwarding Restriction to Forwarding Rule for Vau...'. The dialog contains a warning message: 'Below settings will be replaced to the users & groups to whom this policy is assigned.' Below the message are 'Change' and 'Cancel' buttons. The background shows the 'Outgoing Email Forwarding' policy configuration page, with the 'Email Forwarding Address' field visible.

## C) In the **Associated Users** tab, **add all the users** for whom archiving has to be enabled

The screenshot shows the Admin Console interface. On the left is a navigation sidebar with 'Mail Settings' selected. The main content area shows the 'Email Policy - Vaultastic Outgoing' configuration page, with the 'Associated Users' tab active. The page displays a message: 'This policy is applied to the below users. You can add or import users to apply this policy to them. Learn more'. Below the message are '+ Add' and 'Import' buttons. A table is shown with the following structure:

<input type="checkbox"/>	Username/Email Address	Role
No users associated		

**The Associated users list has to be populated with all users whose email needs to be archived. This list will have**

***to be maintained as new users are added to the domain.***

## **Step 5: Copy the previous month's mail to Vaultastic Open or Active Store**

Login to your LegacyFlo account.

To copy the previous month's email to the Vaultastic Active Store, add an [IMAP-VAULTASTIC4](https://docs.mithi.com/home/import-from-a-mailbox-into-vaultastic-v4-active-store) (<https://docs.mithi.com/home/import-from-a-mailbox-into-vaultastic-v4-active-store>) request type.

To copy the previous month's email to the Vaultastic Open Store, add an [IMAP-S3-ZIP/IMAP-S3-PST](https://docs.mithi.com/home/upload-from-a-mailbox-to-vaultastic-v4-open-store) (<https://docs.mithi.com/home/upload-from-a-mailbox-to-vaultastic-v4-open-store>) request type

The **source parameters** for these requests will be

**User:** vaultastic

**Domain:** <your domain>

**Source Server:** imappro.zoho.in

**Port** :- 993

**Since:** 1st of Prev month

**Before:** 1st of this month

***This step has to be repeated every month***

## **Step 6: Remove the previous month's mail from the Zoho mailbox.**

Login to the vaultastic@<yourdomain> user account

Search for all mail transacted in the previous month

Delete the messages

***This step has to be repeated every month***

---