



OutSmart

Feature user guide

Custom Domain

User Guide Custom Domain

Introduction

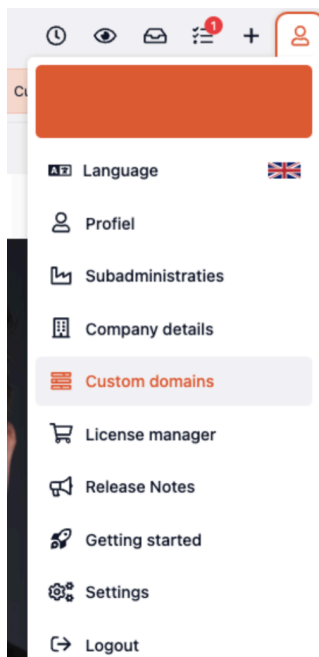
The Custom Domain functionality in OutSmart enables users to send all external communications from their own email domain rather than an OutSmart email address. This feature improves brand consistency, increases customer trust, and strengthens professional identity. Once configured, digital work orders, quotes, and invoices are sent directly from the user's own domain.

Setting Up Your Custom Domain

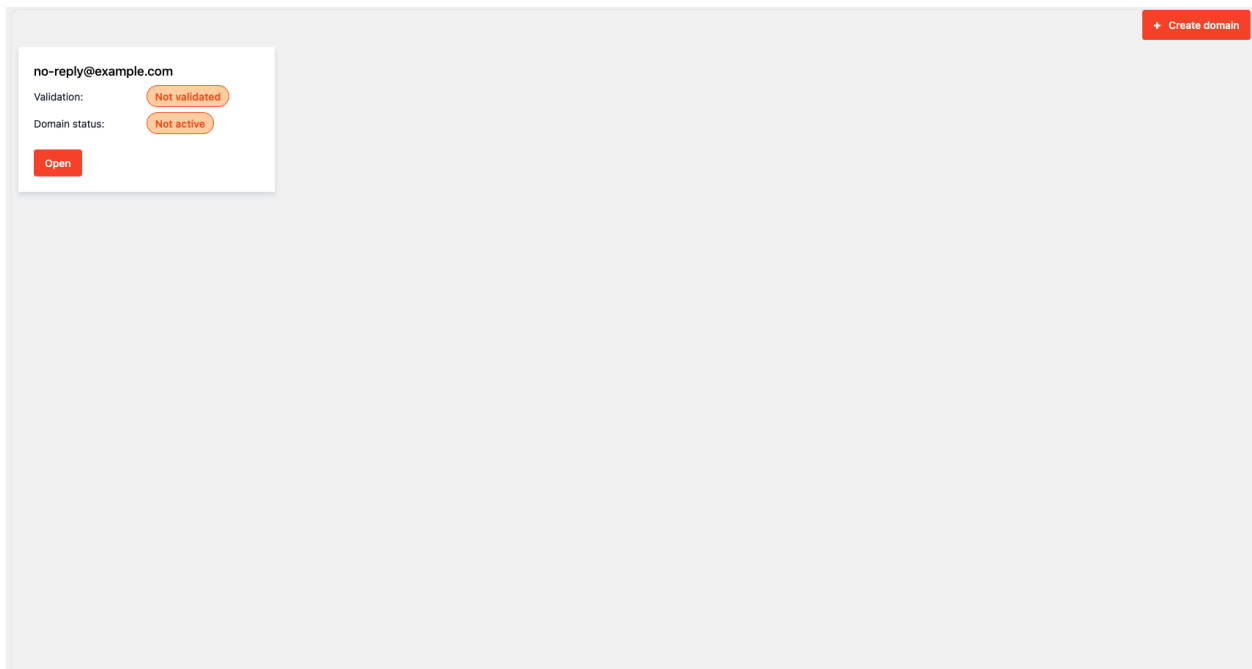
Note: The Custom Domain module is available starting from the Boost subscription level.

Step 1: Accessing the Custom Domain Configuration Page

1. Log into your OutSmart account.
2. Navigate to the Custom Domain menu. Click top right on your user account settings and navigate to the Custom Domain menu item.



3. Select Custom Domain Configuration. This will open the configuration page where you can manage your domain settings.



Step 2: Adding Your Domain Information

1. In the Custom Domain Configuration section, enter the domain you wish to use for sending communications. This domain should be one that your organization owns and has control over.
2. Follow the on-screen instructions to validate your domain. You may be required to add specific DNS records to your domain's DNS settings. Instructions for these records will be provided in OutSmart.

example.com Delete Validate

Domain details

Domain name * Domain prefix * @example.com

Set domain as outbound e-mail address Created at

DNS keys

Type	Key	Value	Validated
cname	s2_domainkey.example.com	s2.domainkey.u32816851.w102.sendgrid.net	✗
cname	s1_domainkey.example.com	s1.domainkey.u32816851.w102.sendgrid.net	✗
cname	em5508.example.com	u32816851.w102.sendgrid.net	✗

List 1 to 3 of 3 results < 1 >

All DNS keys need to be verified in order to send OutSmart e-mails from your domain

[Undo all changes](#) Save changes

example.com Delete Validate

Domain details

Domain name * Domain prefix * @example.com

Set domain as outbound e-mail address Created at

DNS keys

Type	Key	Value	Validated
cname	s2_domainkey.example.com	s2.domainkey.u32816851.w102.sendgrid.net	✓
cname	s1_domainkey.example.com	s1.domainkey.u32816851.w102.sendgrid.net	✓
cname	em5508.example.com	u32816851.w102.sendgrid.net	✓

List 1 to 3 of 3 results < 1 >

All DNS keys need to be verified in order to send OutSmart e-mails from your domain

Step 3: Verifying Your Domain

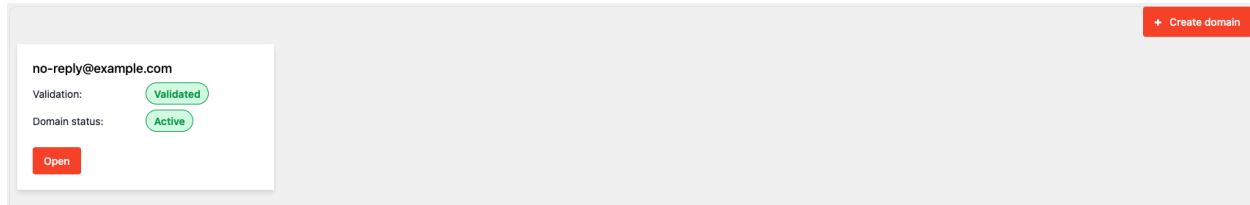
1. After adding the required DNS records, return to the Custom Domain configuration page in OutSmart.
2. Click Verify Domain to confirm that the records have been set up correctly (the button can only be pressed manually once every hour).

Note: By default we already hourly validate the new entries from the previous hour so it might happen fully automatically.

- If successful, you will see a confirmation message indicating that your domain has been verified.
- If unsuccessful, recheck the DNS entries and try verifying again after a few minutes.

Tip: It may take a few hours for DNS changes to propagate. If verification fails initially, wait and try again later.

If successful you will see the following screen (the status will still be inactive, you still have to manually enable it once the verification process is done) :



NOTE: we also revalidate each domain weekly if they are still valid. We do this to ensure mails are still able to reach the end customer if for some reason there is a misconfiguration and/or when you're no longer in control of that domain (by for example not extending the (usually yearly/monthly) payment for that domain).

If for some reason we detect a misconfiguration, we'll deactivate the custom domain, send you an email regarding the deactivation and fallback to our internal default email for sending emails to end customers.

Step 4: Enabling the custom domain

Once your domain is verified, you can enable it.

Simply select it, change the active toggle to "on" and save it.

Step 5: Setting Up Email Addresses

1. Once your domain is verified, configure the email addresses that will be used for outbound communications (e.g., sales@yourdomain.com, support@yourdomain.com).
2. You can only configure one email address for all communications (quotes, work orders, invoices)

Sending Communications

With your Custom Domain configured, all outgoing communications (work orders, quotes, invoices) will automatically be sent from your specified email addresses.

Verifying Outgoing Email Delivery

1. After configuration, test the setup by sending a test email from each configured email type (e.g., work orders, quotes, invoices) to ensure successful delivery.
2. Check the recipient's inbox to confirm that the emails are sent from your custom email address and that the formatting appears as expected.