CUSTOMER SUCCESS GUIDE

# Setting Up a Custom Email Domain

How-To Guide • Assist CRM Platform

> **Objective:** Connect your own domain (e.g. you@yourbusiness.com) to Assist CRM so emails send from your branded address, building trust with leads and clients from the very first touchpoint.

## Overview

By default, Assist CRM sends emails from a shared sending address. Setting up a custom email domain lets your emails come from your own branded address. You'll add two DNS records to your domain provider (GoDaddy, Namecheap, Squarespace, etc.).

About 10 minutes | 2 DNS records | DNS may take a few minutes to propagate

## Before You Start

- [ ] Have your email address ready (e.g. you@yourdomain.com)
- [ ] Know your domain provider login (GoDaddy, Namecheap, Squarespace, etc.)
- [ ] Log in to Assist CRM at app.assistcrm.ai

## Step-by-Step Instructions

### 1 Navigate to Email Domain Setup

Go to **Settings** › **Email Domains** › **Authenticate a Domain**

> You'll find Email Domains in your account settings menu in Assist CRM.

### 2 Enter Your Email Details

Enter your email address and your **From Name**, which is the sender name that shows in inboxes. Use your first name, full name, or business name.

> **Example:** Email = you@yourdomain.com / From Name = Your Name

### 3 Copy Your Two DNS Records

Assist generates exactly **two records**:

1. **TXT Record (DKIM)**: confirms your domain has permission to send
2. **Return Path Record**: handles delivery routing

> Keep this tab open. You'll need to come back to verify after adding the records.

### 4 Add Records to Your DNS Provider

Open your domain provider in a new tab (GoDaddy, Namecheap, etc.). Go to DNS settings and add each record with the correct record type. Paste the values exactly as shown in Assist.

> Only two records needed total. **Do not add MX records** unless specifically asked.

### 5 Verify the Domain

Return to Assist CRM and click **Verify**.

> DNS propagation can take a few minutes. If it doesn't verify right away, wait 5 minutes and try again. This is completely normal.

### 6 Send a Test Email

Send a test email to yourself to confirm it comes from your custom domain.

> Check that both the sender name and email address look correct in your inbox.

### 7 Set the Domain to Active

Click **Done**, then set the domain status to **Active**.

> Your From Name is editable any time after setup via Settings › Email Domains.

## Definition of Done

- Domain shows as **Active** in Settings › Email Domains
- Both DNS records added to domain provider without errors
- Domain verified in Assist CRM
- Test email sent and received, with correct sender name and address
- Emails are sending from your custom branded address

## Notes & Edge Cases

**DNS takes time**
If Verify fails on the first try, wait 5–10 minutes and try again. This is normal.

**Two records only**
Assist only requires the TXT (DKIM) record and Return Path record. Do not add MX records.

**Root domain works fine**
You can use your root domain (you@yourdomain.com). No subdomain required.

**From Name is always editable**
Update how your name appears in outgoing emails any time via Settings › Email Domains.

**MX record errors**
If you see an MX record error after setup, reach out to the Assist support team and we will help get it sorted.

## Tools & Resources

| Tool | Purpose | Link |
|---|---|---|
| **Assist CRM** | Email domain setup | app.assistcrm.ai |
| **Your DNS Provider** | Add TXT and Return Path records | Login at your provider |