Automation Templates and How They Work

Integrations · https://coreel.ai/help/automation-templates-and-how-they-work/

Automation templates let coReel act in your CRM when someone engages with your video: apply a tag, start a workflow, or launch a flow. The most common pattern: a prospect watches your video, and your CRM tags them and starts your follow-up without you lifting a finger.

This article covers what automation templates are, how to set them up, and the events you can use.

What an automation template is

An automation template is a named set of actions for one CRM. For each event, you choose what should happen in that CRM. For example:

- "When a recipient watches 90% or more of my video, apply the HighLevel tag **video-watched** and start the **Hot Lead Follow-Up** workflow."
- "When someone clicks my call to action, apply the Keap tag **cta-clicked**."

Templates belong to your whole organization, so everyone on the account picks from the same list. Build a template once, then choose it on any send.

Events you can trigger on

- **Opens email**
- **Clicks video in email**
- **Clicks CTA button**
- **Plays video**
- **Watches 90%+ of video**
- **Replies with text**
- **Replies with video**

- **Shares video**
- **New contact captured (anonymous reply)**
- **Scans the QR code on a mailed card** (only when mailed cards are turned on for your account)

Each event triggers once per recipient per email. If someone watches your video twice, the action runs the first time only.

Actions you can take

The actions depend on the CRM:

- **HighLevel:** apply a tag, start a workflow, or both
- **Keap:** apply a tag
- **HubSpot:** enroll the contact in a workflow
- **Salesforce:** launch an autolaunched Flow
- **Zoho CRM:** apply a tag

You pick tags and workflows by name from lists coReel loads from your CRM. You don't need to look up any IDs. coReel doesn't create tags or workflows for you, so create them in your CRM first, then click **Refresh tags/workflows** in coReel to load them.

Who can set up automations

Automation settings and templates live in **Settings → Integrations → Automation Access & Templates**. Only an **Owner** or **Manager** can see and change them. Templates are created and edited on the desktop web app, not in the mobile app.

Choose how your team uses automations

At the top of **Automation Access & Templates**, the **Users should be able to:** setting decides how automations work on every email:

- **Use automation templates only** (the default): people choose one of your templates when they send.
- **Use only the default automation**: every email gets the same default actions, and people can't change them.
- **Select their own automation triggers on each email**: people can choose a template, or pick tags and workflows for each event on the send screen.
- **Not use any automations**: automations are turned off.

If you have more than one CRM connected, also choose the **Default CRM / Automation Provider**.

Creating an automation template

1. Sign in to coReel at app.coreel.ai.
2. Go to **Settings → Integrations → Automation Access & Templates**.
3. Make sure **Users should be able to:** is set to **Use automation templates only** or **Select their own automation triggers on each email**. The template form only appears in those two modes.
4. Choose the **Provider** (the CRM this template acts in).
5. Enter a **Template Name**, for example "Sales Follow-Up".
6. For each event you want to use, pick the tag, workflow or flow from the list. Leave the rest on "No action".
7. Click **Create Template**.

Success Check: The template appears under **Automation Templates** as "Provider: Name". That list shows the templates for the provider currently selected in the form.

Applying a template on a send

1. Record or pick a video as normal.
2. On the send screen, find the **Automation Settings** card.
3. Choose a template from the **Automation template** list.
4. Send.

When any event in that template happens on this email, coReel runs the matching action in your CRM. If your team is set to **Select their own automation triggers on each email**, you can open **Advanced Trigger Settings** to pick tags and workflows for each event instead.

You can also attach a template to a tracked SMS link: in **Sent**, open **Send via SMS** on an email, choose the template and the recipient's email address under **Track & Trigger Automations**, and click **Copy Tracked SMS Link**.

Setting a default automation

To apply the same actions to every email automatically:

1. Go to **Settings → Integrations → Automation Access & Templates**.
2. Set **Users should be able to:** to **Use only the default automation**.
3. For each event, pick the actions for your default CRM.
4. Click **Save Default Automation**.

From then on every email uses those actions, and people won't see a template choice when they send.

Seeing what your automations did

In **Sent**, click **View Automation Dispatch** under any email. You'll see each action with its time, CRM, event, status (applied, skipped or failed), the tag or action, the recipient, and the reason when something was skipped or failed.

What happens when an automation fails

The email itself is never affected. Only the CRM action fails, and it shows as **failed** in **View Automation Dispatch** with the reason. coReel doesn't send a separate alert, so check there if something didn't happen.

Common causes:

- The tag or workflow was deleted or renamed in your CRM
- The CRM connection expired (reconnect it in **Settings → Integrations**)
- The workflow isn't published in your CRM

Editing a template

1. Go to **Settings → Integrations → Automation Access & Templates**.
2. Under **Automation Templates**, click **Edit** next to the template.
3. Change the actions. The provider can't be changed while editing.
4. Click **Update Template**, or **Cancel** to stop editing.

Emails you've already sent keep the actions they were sent with. One exception: for HighLevel and Zoho, if an event had no action when the email was sent and you later add one to the template, that new action can also run on those emails.

Deleting a template

1. Go to **Settings → Integrations → Automation Access & Templates**.
2. Click **Delete** next to the template.
3. If the template was used on emails you've sent, coReel lists them and asks you to confirm.

Emails you've already sent keep the actions they were sent with. The template just disappears from the list.

Mobile

In the mobile app you can choose a CRM and an automation template when you send, as long as your team uses **Use automation templates only**. Creating and editing templates, and picking triggers on each email, happen on the desktop web app.

Troubleshooting

My automation didn't fire. Check **View Automation Dispatch** on that email first: it shows whether the action ran, was skipped or failed, and why. Then check that the email had a template selected (or your team uses the default automation), and that your CRM still shows **Connected** in **Settings → Integrations**. Remember each event triggers once per recipient per email.

The action ran but nothing happened in my CRM. Make sure the workflow is published, not a draft. Also check the workflow's entry conditions: many workflows have filters that quietly keep some contacts out.

The tag or workflow I need isn't in the list. Create it in your CRM, then click **Refresh tags/workflows**.

I don't see Automation Access & Templates in Settings. Only an Owner or Manager can see it.

There's no template list on the send screen. Your team is set to **Use only the default automation** or **Not use any automations**. An Owner or Manager can change this in **Settings → Integrations → Automation Access & Templates**.