Choose who a video is for — and track every way you send it

Integrations · https://coreel.ai/help/choose-who-a-video-is-for-and-track-every-way-you-send-it/

When you pick the contact *before* you record, every way you share that video knows who it's going to — a text message, a copied link, an embed, or a share-page link. That means opens, plays, clicks, and replies are all tracked to that person, and your CRM automations fire for them.

Before, only Gmail and Outlook sends carried that tracking. Now your **SMS links, copied/embedded code, and share links** do too.

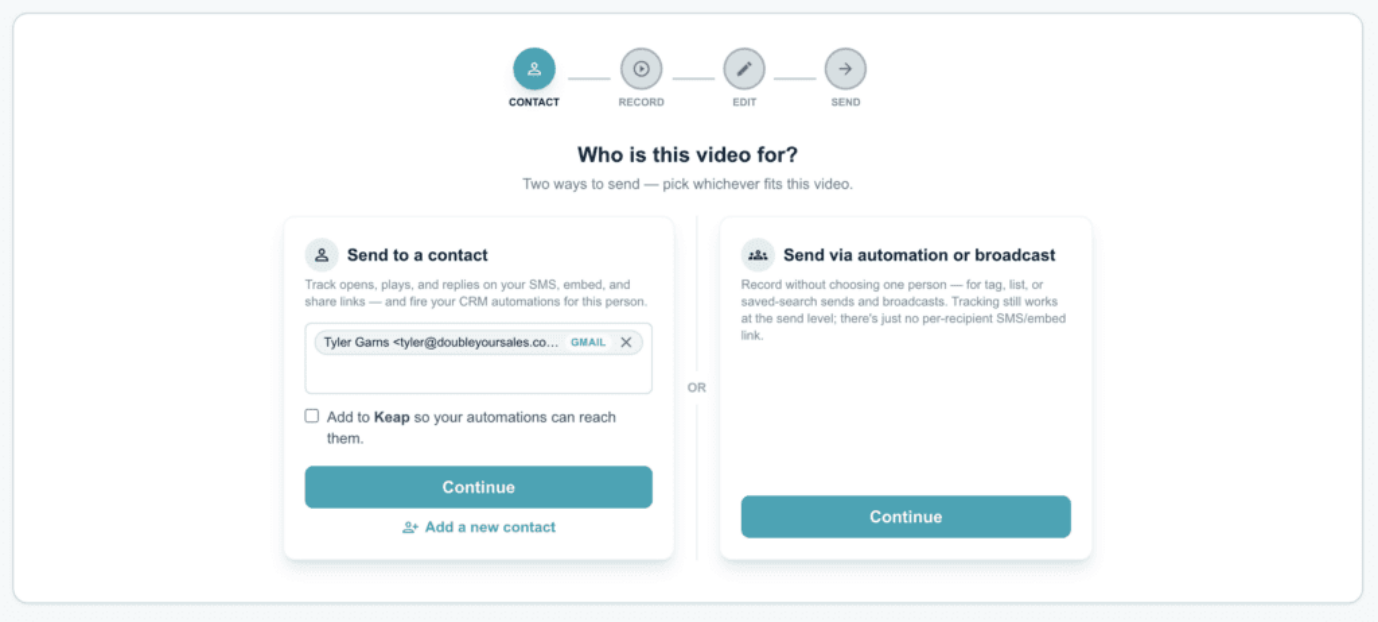
> Embedded media: https://www.youtube.com/embed/1iZYjrfgW28?feature=oembed

Step 1 — Choose who the video is for

1. Click **New Video** (web) or tap **+** (mobile) to start.
2. On the **"Who is this video for?"** screen, you'll see two choices:

- **Send to a contact** — for a video meant for one person.
- **Send via automation or broadcast** — for a tag, list, saved search, or a broadcast (this is the same flow you've always used).

1. Under **Send to a contact**, search by name or email, pick the person, and click **Continue**.



Success check: You move on to recording with that contact remembered for the rest of the flow.

Step 2 — Add someone who isn't a contact yet

If the person isn't in your contacts, you can add them on the spot.

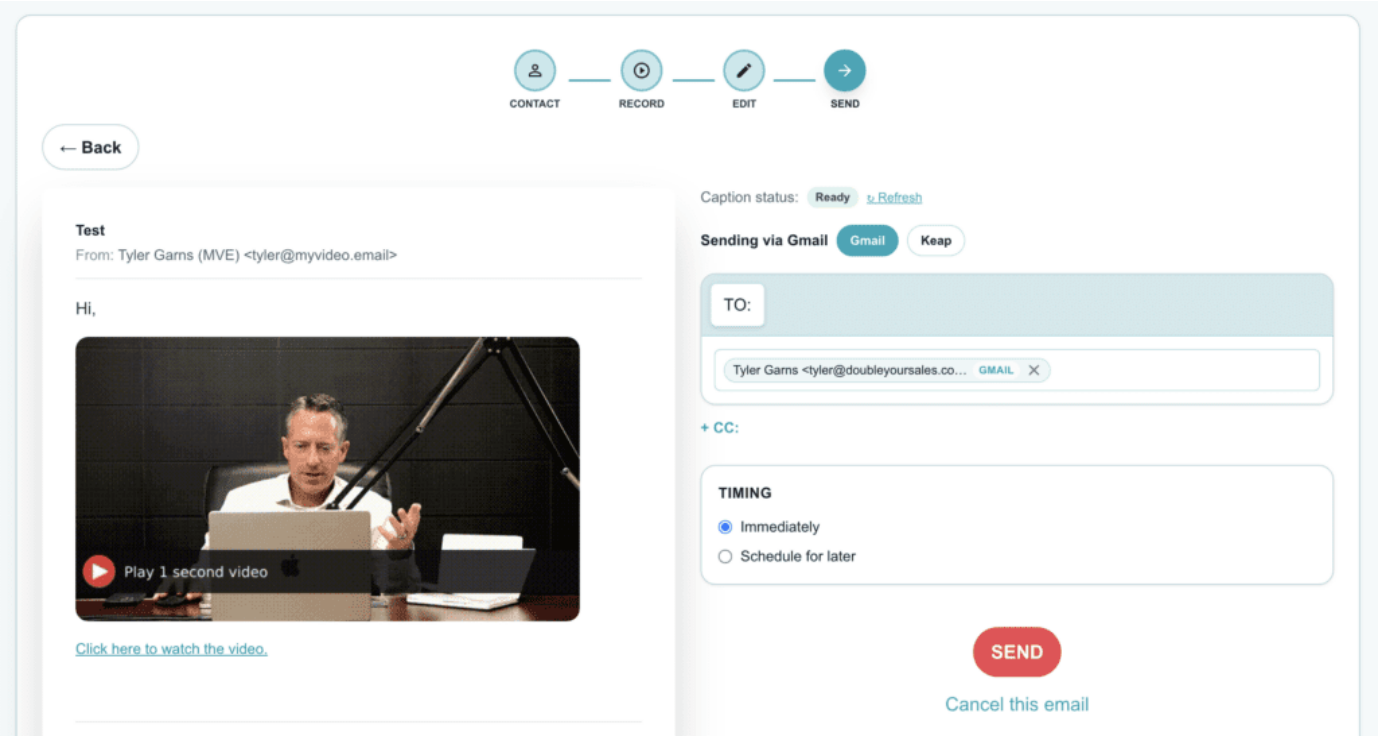
1. Click **+ Add a new contact** (it also appears if your search finds no match).
2. Enter a **first name** and an **email address or phone number**.
3. If you have a CRM connected (Keap, HighLevel, HubSpot, or Zoho), leave **Add to [your CRM]** checked so your automations can reach them. New contacts are added as opted-in to receive your emails.
4. Click **Continue**.

Success check: The new person is set as the recipient — and saved to your CRM if you chose to.

Step 3 — Record, then send any way you like

1. Record (or upload) your video and edit it as usual.
2. At the send step, the recipient is **already filled in** — no retyping.

3. Send however you want: through Gmail/Outlook, your CRM, an SMS link, or by copying a link or embed code. Whichever you choose, the link carries that contact's tracking.



Success check: Engagement (opens, plays, clicks, replies) shows up against that contact in My Emails — and your CRM automations run for them.

Tips and best practices

- Use **Send to a contact** for one-to-one outreach where you want full tracking and automations. Use **Send via automation or broadcast** for tag/list sends — that path works exactly as before.
- A **phone-only** contact works too, as long as you have a CRM connected to create the contact.
- You can still change your mind: remove the pre-filled recipient at the send step and pick someone else.

Troubleshooting

I picked a contact, but the recipient field is empty at the send step.

Make sure you're on the latest app version. On the web app this works right away; on mobile it

arrives with app version 1.2.0.

The contact I picked isn't in the CRM I'm sending from.

The recipient pre-fills for the CRM the contact belongs to. If you switch to a different CRM's send panel, search and pick the contact there, or use **+ Add a new contact**.

Related

- Add a Cc to your Gmail and Outlook sends
- Create a QR code for a watch page
- Share a watch page