Common Setup Mistakes and How to Avoid Them

General · https://coreel.ai/help/common-setup-mistakes-and-how-to-avoid-them/

Avoid these frequent issues during onboarding.

Mistake 1: No Active Integration

Problem: Sending/tracking blocked.

Fix: Connect at least one provider in /integration.

Mistake 2: Skipping Camera/Mic Permissions

Problem: Recording fails or no preview.

Fix: Run **Enable Camera** and allow permissions.

Mistake 3: Wrong Provider Account Connected

Problem: Sends from unexpected mailbox/account.

Fix: Disconnect/reconnect using the intended account.

Mistake 4: Trial User Not Email-Confirmed

Problem: Login blocked after signup.

Fix: Confirm email via activation link first.

Mistake 5: Role Mismatch

Problem: User can’t perform admin/integration actions.

Fix: Verify Owner/Manager/User role assignment.

Mistake 6: Using Copy/Send as Default

Problem: Reduced tracking/automation depth.

Fix: Use in-app sending as standard workflow.

Mistake 7: No Internal Test Before Live Outreach

Problem: Formatting or tracking surprises.

Fix: Always send test to yourself/teammate first.