Connect coReel to Salesforce

Integrations · https://coreel.ai/help/connect-myvideo-email-to-salesforce/

Send personal video emails straight from your own Salesforce account, and see every result on the record: the email you sent, who watched, how far they got, whether they clicked your call-to-action, and their replies. It all lands on the Contact or Lead, so the next touch is perfectly timed, and your Salesforce reports can show which videos are working.

Setup takes about 15 minutes: your Salesforce admin installs our app and sets up email sending once, then each rep connects their own account.

Before you start

- **Salesforce edition:** Enterprise, Unlimited or Developer Edition, or Professional Edition with API access added. coReel connects through Salesforce's API, which other editions don't include.
- **Who does what:** steps 1–4 are done **once by a Salesforce admin**. Steps 5–7 are for **each rep**.

Step 1 — Install the coReel package (admin)

Salesforce only lets an app connect once it's installed in your org.

1. Open the **coReel listing on AppExchange** and click **Get It Now**. *(Link: REPLACE with the AppExchange listing URL once it's live.)*
2. Choose **Install in Production** (or **Install in Sandbox** to try it first).
3. Choose **Install for Admins Only**, then click **Install**.
4. When it finishes, check **Setup → Installed Packages**: **coReel** is listed.

Success check: coReel appears under Installed Packages, and a **Video Views** tab is available.

Step 2 — Give people access (admin)

The package includes two permission sets:

Permission set	Assign it to	What it allows
coReel Integration	Every rep who will connect coReel	Lets coReel log emails, activity and Video Views for that rep
coReel Viewer	Managers and anyone else who should see results	Read-only access to Video Views and the video engagement fields

1. Go to **Setup → Users**, open a user, and click **Permission Set Assignments → Edit Assignments**.
2. Add the right permission set and click **Save**. Repeat for each user.

Success check: each rep has **coReel Integration** listed under their permission set assignments.

Step 3 — Show Video Views on Contacts and Leads (admin)

Video Views is a list on each Contact and Lead showing every video email they've received from your team and how far they got. Salesforce doesn't let an app change your page layouts, so add it yourself:

1. Go to **Setup → Object Manager → Contact → Page Layouts** and open the layout your team uses.
2. In the palette, choose **Related Lists**, drag **Video Views** onto the page, and click **Save**.
3. Do the same for **Lead**.

Success check: open any Contact and you see a **Video Views** section (empty until your first send).

Step 4 — Let Salesforce send email from your domain (admin)

When reps send through Salesforce, the email comes from their own address, for example `jordan@yourcompany.com`. To make sure it reaches inboxes rather than being rejected, Salesforce needs to sign it for your domain with a **DKIM key**. coReel checks this before every send and tells you if it's

missing.

1. Go to **Setup → Deliverability** and set **Access level** to **All email**. Click **Save**.
2. Go to **Setup → DKIM Keys → Create New Key**:
   - **Key Size:** 2048-bit
   - **Selector** and **Alternate Selector:** two names not already used on your domain, e.g. `sf1` and `sf2`
   - **Domain** and **Domain Match Pattern:** your email domain, e.g. `yourcompany.com`
3. Click **Save**. After a few minutes, refresh the page: Salesforce shows two **CNAME records**.
4. Add both CNAME records in your domain's DNS settings.
5. Back on the key's page, click **Activate**. If Salesforce can't find the records yet, wait a little longer and try again.

Success check: the key shows as **Active**.

Step 5 — Connect your company's Salesforce (coReel owner or admin)

1. Sign in to coReel at app.coreel.ai and go to **Integrations**.
2. Find **Salesforce** and click **Connect** on the **Company connection** tile.
3. Choose **Production (login.salesforce.com)**, or **Sandbox (test.salesforce.com)** if you're connecting a sandbox, then click **Continue to Salesforce**.
4. Log in to Salesforce and click **Allow**.
5. Back in coReel, choose what to log:
   - **Log sent emails on the Contact or Lead**
   - **Log views, clicks and replies**

Success check: the Company connection shows as connected, with your Salesforce org's name.

Step 6 — Connect your own Salesforce account (each rep)

This is what lets you send as yourself.

1. In coReel, go to **Integrations → Salesforce** and click **Connect** on **Send email as yourself**.
2. Choose the same environment as your company (usually **Production**) and log in with **your own** Salesforce account.

Success check: "Send email as yourself" shows as connected with your Salesforce email address.

Step 7 — Send a video through Salesforce

1. Record or choose a video as usual.
2. In the send step, choose **Salesforce** as the sender. The From address is your Salesforce user's email.
3. Pick who receives it:
   - **Contacts & Leads** — search your Salesforce contacts and leads and pick one or more.
   - **Campaign** — pick a campaign; it goes to every contact and lead in it that you can see in Salesforce.
4. Write your message and click **Send**.

Each email counts toward your Salesforce org's daily email limit.

Success check: within a minute, the email appears in the recipient's activity in Salesforce.

What you'll see in Salesforce

- **The email you sent**, on the Contact or Lead's activity timeline. The logged copy looks like the email you sent, but its video link is removed, so opening it in Salesforce never counts as the recipient watching.
- **One activity per recipient per email**, updated as they go further: clicked, started watching, watched to the end, clicked your call-to-action, replied, shared.

- **A Video View** in the Video Views list, with the time of each step and a link to their reply. Use the **coReel Video Views** report type to build reports like "who watched to the end this week".
- **Last Video Event** and **Last Video Event At** fields on the Contact and Lead, always showing the most recent thing they did.

Clicks from your own network and from email security scanners are filtered out, so the activity reflects real people.

Tips and best practices

- **Start automations from engagement.** In the **Automation** step when you send, you can pick a Salesforce **Flow** to run for an event, for example when someone watches to the end or replies. Build an *autolaunched* Flow and add any of these text input variables, which coReel fills in: `recordId` (the Contact or Lead), `mveEvent` (e.g. `video_complete`), `mveVideoTitle`, `mveEmailSubject`, `mveRecipientEmail`. Only the variables your Flow declares are sent.
- **Prefer record-triggered Flows?** Trigger them on changes to the **Last Video Event** field instead.
- **Keep sends one-to-one.** Video email works best when each person feels it was made for them. Use Campaign sends for small, warm groups.

Troubleshooting

"Salesforce can't deliver email as … yet" Your domain has no active DKIM key in Salesforce. Ask your admin to complete Step 4.

"Your Salesforce edition doesn't include API access" coReel needs Salesforce's API. It's included in Enterprise and Unlimited, and Professional can add it.

"Connect your company's Salesforce before connecting your own." Step 5 has to be done first, by your coReel owner or admin.

"That Salesforce login belongs to a different Salesforce org than your company's connection." Log out of Salesforce and connect again with your account in your company's org.

Salesforce says the app is blocked or not installed Your admin needs to install the package (Step 1) before anyone can connect.

Sends say "sent" but nothing arrives Check that your Salesforce org can send email at all: in Salesforce, send a quick email to yourself from a Contact. If that fails or says your email limit is exceeded, contact Salesforce support. Also check **Setup → Deliverability** is set to **All email**.

No activity is showing up Make sure the rep has the **coReel Integration** permission set (Step 2), and that both logging options are on (Step 5). Opens and clicks from your own office network are filtered out on purpose, so test from a phone on mobile data.