CTA Templates: Save and Reuse Call-to-Action Buttons

Watch Page Settings · https://coreel.ai/help/cta-templates-save-and-reuse-call-to-action-buttons/

If you find yourself typing the same CTA button text and URL over and over — "Book a meeting" pointing at your Calendly link, for example — save it as a **CTA Template**. Then apply it in one click on any future send.

This article covers creating, editing, applying, and managing your CTA templates.

Why use CTA templates

A few real reasons:

- **Consistency.** Your CTAs always look and read the same way across hundreds of sends.
- **Speed.** One click vs. typing the label and pasting a URL every time.
- **Team-wide standards.** If you're on a team account, share templates so everyone's CTAs are aligned with the brand.
- **A/B alternates.** Keep two or three variants of the same CTA so you can quickly switch between them.

Creating a CTA template

1. Sign in to coReel at app.coreel.ai.
2. Go to **Settings → CTA Templates**.
3. Click **+ New Template**.
4. Fill in:
    - **Template name** — what you'll call it internally (e.g., "Book intro call").

- **Button label** — the text on the button as recipients see it (e.g., "Book a 15-min call").
- **URL** — where the button takes recipients.
- **Open behavior** — same tab or new tab (new tab is usually best).
- **Color override** (optional) — if this CTA should use a different button color than your default.

5. Click **Save**.

Your template is now available everywhere you compose.

Success Check: The template appears in your list at **Settings → CTA Templates**.

Applying a template on a send

1. Record or pick a video as normal.
2. On the send screen, find the **Watch Page Options** panel.
3. In the CTA section, click **Choose CTA Template**.
4. Pick a template from your list.
5. The label, URL, and color fields auto-fill.
6. Tweak any field if you want a one-off variant; the underlying template isn't changed.
7. Send.

Editing a template

1. Go to **Settings → CTA Templates**.
2. Click the template you want to edit.
3. Update any field.
4. Save.

Note: Editing a template **does not** retroactively change watch pages for sends that already used it. Old sends keep the CTA they had at the time. New sends and any future application of the template pick up the new values.

Setting a default template

You can mark one template as your **default** so it's pre-applied to every new send.

1. Go to **Settings → CTA Templates**.
2. Hover over the template you want as default.
3. Click **Set as default**.

From now on, every new send pre-fills with that template's CTA. You can still pick a different template or override fields per send.

Sharing templates with your team

If you're on a team account, you can mark a CTA template as **shared with team** so other members of your organization can apply it.

1. Open the template.
2. Toggle **Share with team** to **On**.
3. Save.

Team members will see the template in their CTA picker. They can apply it but can't edit or delete it — only the template's owner can.

Deleting a template

1. Go to **Settings → CTA Templates**.
2. Hover the template.
3. Click the **trash icon**.
4. Confirm deletion.

Deleting a template doesn't affect past sends — they keep whatever CTA they had at send time. It only removes the template from the picker for future sends.

Naming conventions that help

Templates pile up. A few patterns to keep them findable:

- **Use the action.** "Book intro call," "Schedule demo," "See pricing"
- **Distinguish variants.** "Book intro call (Calendly)" vs. "Book intro call (HubSpot)"
- **Date-stamp seasonal CTAs.** "Q4 promo - 20% off" so you remember why it's there
- **Group with prefixes.** "Sales - Book demo," "Sales - See pricing," "Support - Help article"

Troubleshooting

My templates don't appear in the picker on send. Refresh the page. If still missing, check **Settings → CTA Templates** to confirm the templates exist. If they exist but won't load in the picker, sign out and back in.

A team member can't see a shared template. Make sure **Share with team** is toggled on the template. Also verify the team member is in your organization — templates only share within a single org.

Editing a template didn't update the CTA on a past send. This is expected. Templates apply at send time. To update a past send's CTA, open the send in **My Emails** and edit the CTA there directly.

The picker shows templates I deleted. This is a browser cache issue. Hard refresh the page (Cmd+Shift+R / Ctrl+Shift+R).