Getting Started

Getting Started · https://coreel.ai/help/getting-started/

Welcome to coReel. This guide walks you through your first success in about 10 minutes:

1. Connect your email integration
2. Record your first video
3. Send your first video email

Before You Start

Make sure you have:

- A coReel account and login
- Access to your email provider account (Google, Microsoft, Keap, or other integrated CRM)
- Camera and microphone available in your browser

Step 1: Connect Your First Integration

1. Log in to coReel.
2. Go to **Integrations** (/integration).
3. Under **Available Integrations**, click the provider you want to connect:
    - Google
    - Microsoft
    - Keap
4. Complete the provider’s authorization flow.
5. Return to coReel and confirm it now appears under **Connected Integrations**.

Success Check

You should see your provider listed as connected.

If no integration is active, you won’t be able to send or track emails.

Step 2: Record Your First Video

1. Go to **My Videos**.
2. Click **Record Video** (or equivalent record action).
3. Allow browser permissions for:
    - Camera
    - Microphone
4. Select your preferred camera and mic.
5. Record a short test video (30–60 seconds).
6. Stop recording and save/upload.

Success Check

Your video appears in **My Videos** and has a share/embed/snippet option.

Step 3: Send Your First Video Email

1. Go to **My Emails** (or your send flow).
2. Choose the connected integration/account.
3. Select the video you just recorded.
4. Enter recipient details and subject line.
5. Insert/send the video email.
6. Confirm send status.

Success Check

Your email sends successfully and tracking is available (when supported by your integration).

Pro Tips for Better Results

- Keep your first video under 60 seconds.
- Start with a friendly first line using the recipient’s name.
- Use a clear CTA at the end:

  “Reply with your preferred time,” or “Click here to book.”
  - Business and Premium members can add a CTA button on the Watch Page.

Troubleshooting

I can’t connect an integration

- Re-open **Integrations** and reconnect.
- Verify you’re authorizing the correct provider account.
- If your org owner disabled extension access, contact your admin.

Camera/mic isn’t working

- Check browser permissions for camera and microphone.
- Close other apps using your camera.
- Reload and try again.

I’m sent to Integrations when trying to send

- You likely have no active integration.
- Connect at least one provider in /integration.

Next Steps

- Record 3 reusable intro videos for different audiences.
- Create a simple follow-up template in **My Emails**.
- Install and test the Chrome extension or mobile app for faster workflow.