Set up mailed cards for your team

Direct Mail · https://coreel.ai/help/set-up-mailed-cards-for-your-team/

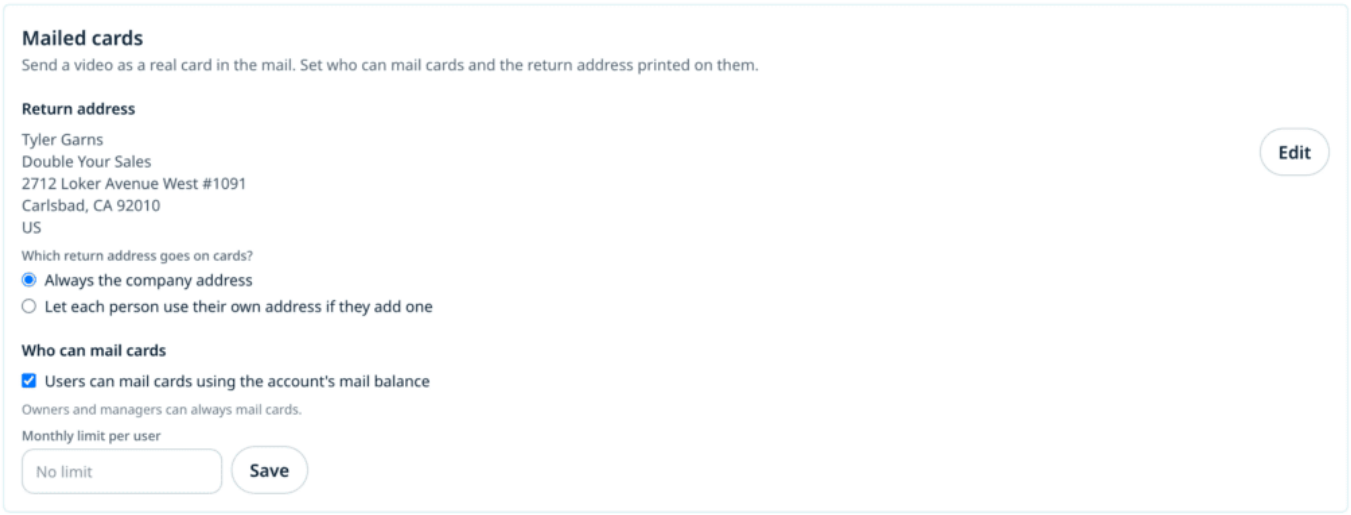
Before your team mails its first card, an owner or manager sets three things: the **return address** printed on cards, **who can mail cards**, and an optional **monthly spending limit** per user. It takes a couple of minutes, and everything lives in one place.

> Embedded media: https://vidreef.com/embed/cdQuGy8gl0

Step 1 — Add your return address

Cards can't be mailed until your account has a return address.

1. Go to **Settings** and find **Mailed cards**.
2. Under **Return address**, click **Add return address**.
3. Enter your company's mailing address and click **Save address**.



Success check: The address shows under **Return address**, and the "No return address yet" warning is gone.

Step 2 — Choose which return address goes on cards

Under **Which return address goes on cards?**, choose:

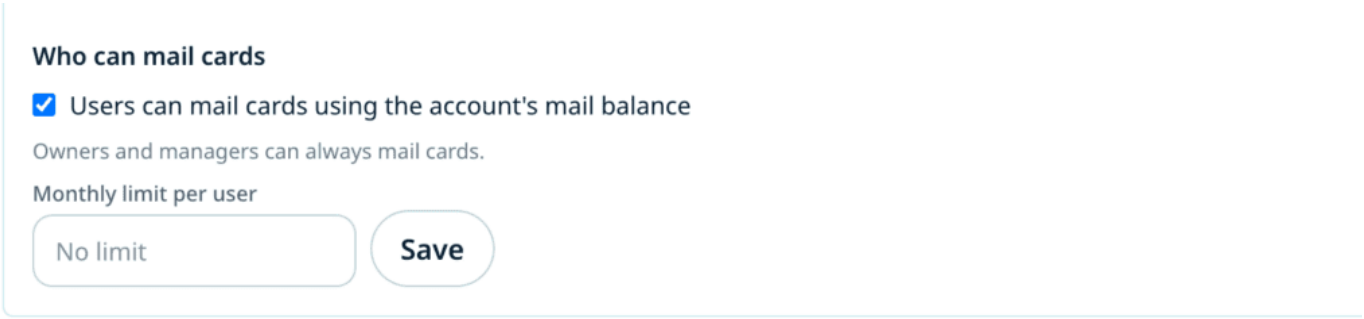
- **Always the company address**: every card shows the address from Step 1.
- **Let each person use their own address if they add one**: useful for distributed teams, such as advisors or reps who work from their own office. Each person adds theirs under **My return address** in Settings. Anyone who doesn't add one uses the company address.

Step 3 — Decide who can mail cards

Owners and managers can always mail cards.

1. Under **Who can mail cards**, switch on **Users can mail cards using the account's mail balance** to let everyone on your team mail cards. Switch it off to keep cards to owners and managers.
2. Optionally, set a **Monthly limit per user** so no one person can spend more than you intend. Choose **No limit** if you don't want one.

3. The table below lists each user, what they've **Spent this month**, and their **Monthly limit**. Change one person's limit there, or leave it on **Default** to use the limit from step 2.



Success check: Users you've allowed see **Mail a card** at the send step; a user who reaches their limit sees how much more the card would need.

Step 4 — Manage saved recipient addresses

When your team types an address while mailing a card and chooses **Save this address for my team**, it's saved to a shared address book.

1. In **Settings**, find **Saved recipient addresses**.
2. Search by name, email or label.
3. Click **Delete** to remove an address your team shouldn't be offered again.

Everyone on your team who can mail cards can see, use and edit saved addresses. If you have a CRM connected, addresses are normally saved back to the contact's CRM record instead, so they stay where the rest of your contact data lives.

Step 5 — Get told when a card is scanned (optional)

1. In **Settings → Notifications**, switch on **Mailed card scanned**.
2. You'll be alerted when someone scans the QR code on a card you sent.

To tag the contact or start a CRM workflow on a scan, see Track mailed cards and automate follow-up .

Tips and best practices

- **Start with a monthly limit**, for example $25 per user, while your team gets the hang of it. You can raise or remove it any time.
- **Keep the company address current.** Undeliverable cards come back to it.
- **Partner (agency) logins can't mail cards from a client's account.** The client's own team mails them.

Troubleshooting

I don't see Mailed cards in Settings. Only owners and managers see the account-wide settings. Users see **My return address** (when the policy allows it) and **Saved recipient addresses**.

A user says Mail a card is missing. Check that **Users can mail cards using the account's mail balance** is on, and that they've chosen a single contact. Cards go to one person at a time.