Track mailed cards and automate follow-up

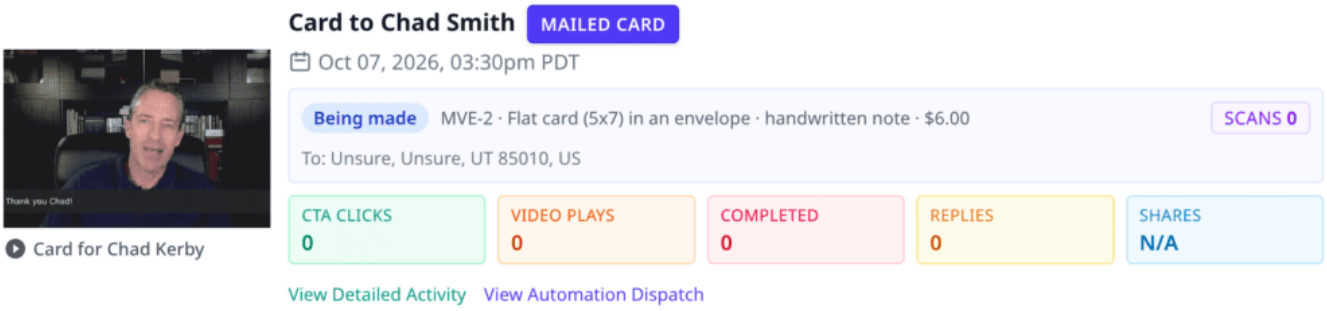
Direct Mail · https://coreel.ai/help/track-mailed-cards-and-automate-follow-up/

A mailed card isn't a shot in the dark. Every card has its own tracked QR code, so you can see when it's been mailed, when your contact scans it, and what they did on your watch page. A scan can also tag the contact or start a workflow in your CRM, so your follow-up happens while they're still thinking about you.

Step 1 — Find your cards

1. Open **My Emails**.
2. Click the **Mailed cards** tab.

Each card has its own row, titled **Card to [name]** with a **Mailed card** chip. The row shows the address it's going to, its status, and how the contact has engaged: **Scans**, plays, CTA clicks and replies.



Step 2 — Follow its status

Status	What it means
Order received	We have your order. You can still edit the address or cancel.

Status	What it means
Being made	Our team is printing (or, for video cards, loading) your card.
Ready to mail	Your card is made and about to go out.
Needs your attention	We've paused the card and need something from you, usually an address fix.
Mailed	It's in the mail. Video cards show a tracking number here.
Cancelled	The card was cancelled and its cost returned to your mail balance.
Not mailed	We couldn't mail this card. Its cost was returned to your mail balance.
Returned to sender	The postal service sent it back, usually because of the address.

We email you when the order is received, when it's mailed, and if it's paused, cancelled, not mailed or returned.

Step 3 — Fix or cancel a card

While a card is **Order received** or **Needs your attention**:

- Click **Edit address** (or **Fix address** on a paused card), correct it, and click **Save address**. For a paused card, click **Save and send to our team** to put it back in the queue.
- Click **Cancel card** to cancel it. The full cost is returned to your mail balance.

Once a card is being made, it can't be changed or cancelled.

Step 4 — See when a card is scanned

When your contact scans the card's QR code, they land on your branded watch page, and the scan is counted on the card's row.

- A scan counts as engagement for that contact, just like a click on an email.
- Plays, CTA clicks and replies from the watch page show on the same row.

- Switch on **Mailed card scanned** in **Settings → Notifications** to be alerted the moment it happens.

Step 5 — Trigger your CRM on a scan

Scanning a card is a strong buying signal. Use it.

1. Go to **Settings** and open your automation settings for your connected CRM.
2. Find the row **Scans the QR code on a mailed card**.
3. Choose what should happen:
   - **Keap** or **Zoho**: apply a tag.
   - **HighLevel**: apply a tag and/or start a workflow.
   - **HubSpot**: start a workflow.
4. Save.

You can also set or change this for a single card on the send step, alongside your other automation choices.

Success check: The next time a contact scans a card, the tag or workflow fires on their CRM record. It fires once per card, so a second scan doesn't start the workflow again.

Tips and best practices

- **Make the scan the start of a sequence.** For example: tag "Scanned mailer" → a task for the rep to call within the hour → a follow-up email the next day.
- **Use a call to action on the watch page.** Your contact has your attention; give them the next step, such as booking a meeting. See Set up watch-page calls to action.
- **Video cards can point the QR code straight at your call to action.** See Send a video card with a built-in screen.

Troubleshooting

My card says "Needs your attention." Open the row to read what we need (shown under "We paused this card. Here's what we need:"). Usually it's an address detail. Fix it and click **Save and send to our team**.

I'm testing a card myself. Why didn't my scan count? We filter out activity that looks like yours, such as a scan from the same network you sent the card from, so it doesn't inflate your contact's engagement. Scan on mobile data instead of your office Wi-Fi. Remember that a counted scan fires your automations on that contact, so test with a card mailed to yourself.

The card was returned to sender. The postal service couldn't deliver it. Check the address and mail a new card from the email's row in My Emails.