National Accounts

05/14/2025 12:15 pm CDT

Overview

Our built-in national account functionality allows you to have a "national account" organization, that can be used for contact tracking from the franchisee organizations to a master parent-level organization.

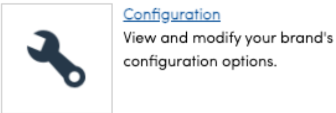
When you have this functionality turned on, when adding/editing a contact from the franchisee organization or from Dispatch there will be a National Account box to be able to search for the "parent" contact in the National Account organization (similar functionality to the Managed by functionality). This allows you to link contacts with this parent/child functionality. If you choose to not link these in this way you can also use a drip trigger to "copy contact from a franchisee or to national account org" by means of other actions like tags, lead source, and so forth.

Video Tutorial

Here is a video explaining all the functionality around National Accounts.

Settings and Navigation

Go to **Dashboard > Tools > Configuration** and choose your settings in the **National Accounts** section.



Creating A National Account

Create the organization you want to use for this setup.

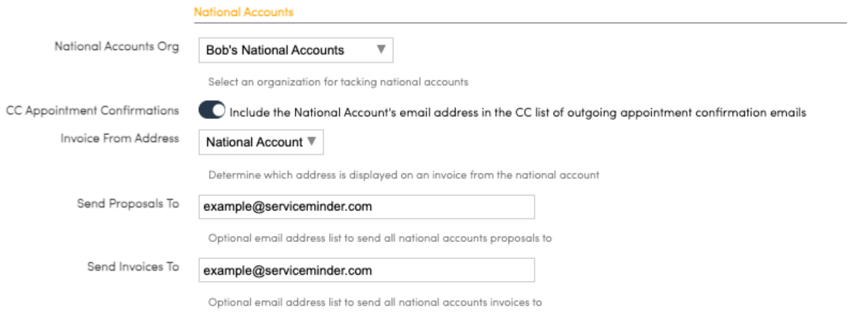
1. **National Accounts Org** - Pick the organization you created for this from the drop-down

2. **CC Appointment Confirmations** - Toggle on if you want the NA organization to be copied on appointment confirmations

3. **Invoice From Address** - Determines which address is displayed on an invoice sent from the National Accounts organization

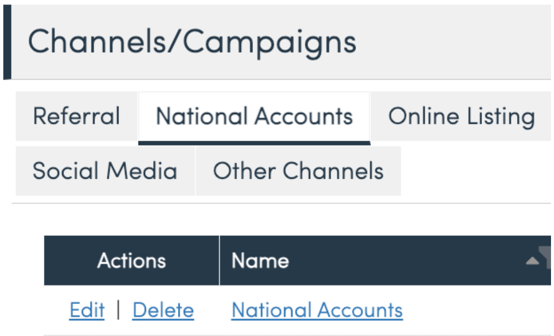
4. **Send Proposals To** - Optional email address list to send all national account proposals to. You can list multiple (i.e., email, email, email)

5. **Send Invoices To** - Optional email address list to send all national account invoices to. You can list multiple (i.e., email, email, email)



Tracking Leads

Some brands like to keep track of leads that are attached to national accounts. One way of doing this is setting up a **Channel** for "National Accounts". When a lead comes in, choosing a channel is mandatory so it is a way of ensuring that the contact is tracked from the very beginning.

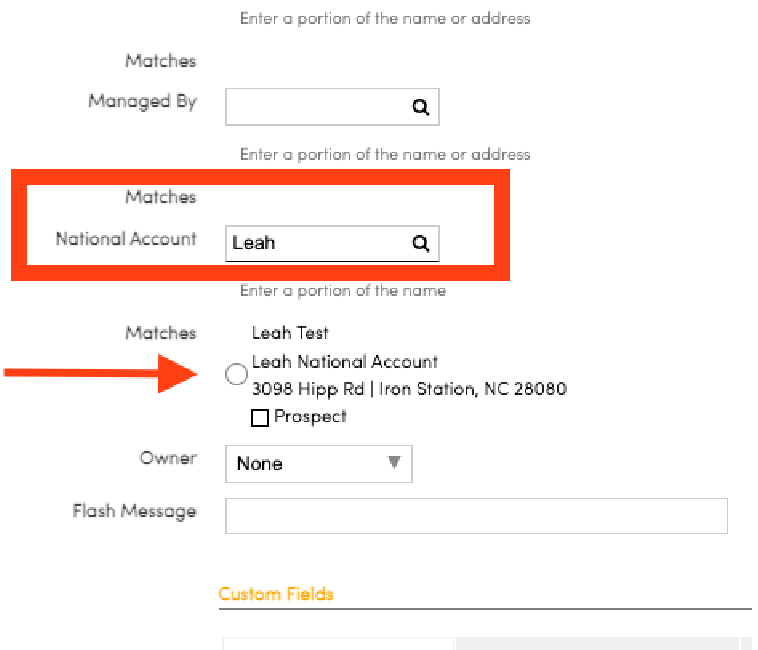


You can also use tags or contact categories, but this will be determined if the brand has automations or processes that ensure the contact becomes a certain category at different steps of the sales pipeline or user journey.

Connecting Contacts

Franchisees will need to make sure that they are connecting "child" contacts to the "parent" contacts. The parent lives in the national account organization. The child lives in the location but if you connect them, the system will know how to copy information if you are using drip triggers.

To connect the two, users in the franchisee location need to fill out the **Matches National Account** field when adding or editing a Contact.



If you do not see a suggested Match appear, then contact your Brand Admin. They may need to have the parent contact added in the National Account org.

Drip Triggers

You can also create Drip Triggers in addition to the existing already coded automation for national accounts. Primarily, you can copy the contact to the national account org and/or you can copy the invoice to the national account org.

If you choose "Copy Invoice" as an action, the system will look for a matching contact in the national org. If it does not find a matching contact, it looks for a matching national account. This is why it is important for locations to have the **Matches** field completed.

Here are some examples:

Example:

- Trigger on "Proposal Sent"
- Action is "Copy to Organization"
- Then you would need to select which organization

Example:

- Trigger on Contact Added
- Filtering by Channel "National Account"
- Action is "Copy to Organization"
- Then you get an additional option (since it has to do with Contacts). If you choose "Treat as National Account" it will automatically connect new copy as a source.

To help clarify, here is one possible automated workflow that you can build:

1. Have one trigger set up to copy a contact to the National Accounts org.

2. Build another trigger to copy invoices over to the NA org. You can use different triggers, like any time a contact is added it can be copied, or maybe when it's tagged w/ a certain contact tag, then copy it over.

Reporting

In the National Accounts org, you can use the organization-level reports to see the invoices, contacts, or payments specific to any national account.

Contacts

There are several ways to view the contacts included in a national account.

1. In any org in your brand, you can go to the **Contacts page** and filter by the **Channel** of **National Accounts**. If your brand set up a channel for this.

Community	Category	Tags	Channel
	prospect		national
Northwest Dallas	Prospect	CabinetIQ Referral	National Account

2. Or go to **Campaigns** page and filter by the specific National Accounts channel. If your brand set up a channel for this.

3. If you want to see all contacts associated with a national account, go to **Reports > Downloads** tab. Click Contacts and select from date range filters and other settings to fine-tune what you want to see.

You will want to turn on the option to see "Only national account related contacts".

National Accounts

Only national account related contacts

Invoices or Payments

You can go to the Reports page and select **Open Invoices** or **Revenue by Lead Source** reports. On Revenue by Lead Source, you can download details of the invoices.

Date	Number	Age	Contact
5/9/2025	INV-9397	5	Soul Cycle - Soul Cycle

You can also go to **Reports > Downloads** tab and choose either **Transactions, Payments,** or **Invoices** and download according to settings for date ranges or status such as created, paid, expired, etc.

FAQ

Why the invoice history is not showing on the National Account contact?

You've linked them up but now you have to copy the contact to the zee org. This is actually done with drip triggers.

So you connect the contacts similar to managed by, but need to determine where the master contact lives (normally that's in the National Account Organization) and then the contact is "copied via drip trigger" to the franchisee org who will be working it. And the invoice created at the zee contact needs the drip trigger to copy it back to the National account org contact.