

Lead Distribution and Marketing

03/28/2025 8:54 am CDT

Overview

Your brand may have access to Email Marketing campaigns within serviceminder. This is considered an add-on feature, so you may not have this brand-wide but individual organizations can purchase this through the MarketPlace within their account.

Our Email Marketing module allows the brand to send email blasts on behalf of the organizations, but the contacts externally see the email come from the local business emails. That means you can widely send a branded email but it contains the addresses, phone numbers, or websites of the individual organizations.

You can also allow the franchisees to opt-in or out of these campaigns. For instance, if you are running a brand-wide discount or offer code but some local businesses do not want to participate, you can skip them when sending out the emails on behalf of the organizations.

You can also allow the individual franchisees to send their own email marketing campaigns. That means there can be both brand-wide campaigns and location A can run their own email blasts separately from location B. This provides more options for you and the owners about how to promote and gain new leads.

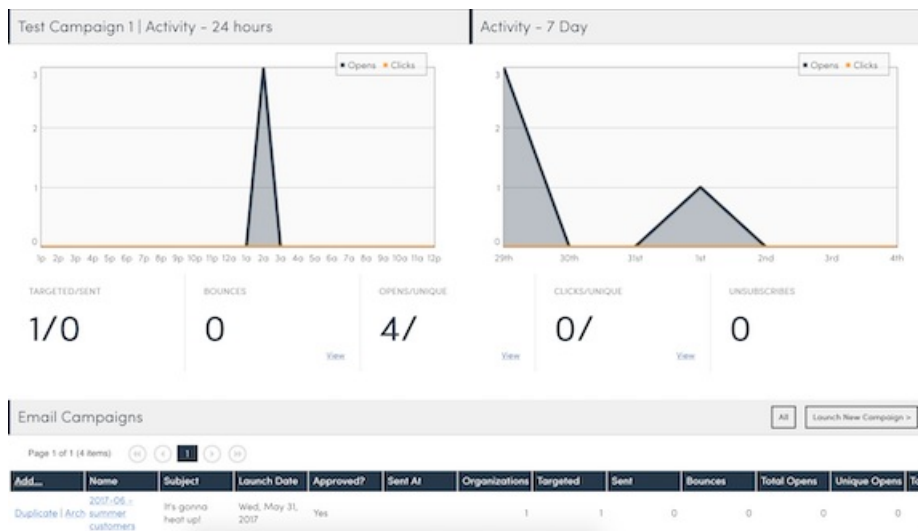
Video Tutorial

This video will show how to create a brand-wide email marketing campaign.

Your browser does not support HTML5 video.

Campaigns

The Email Campaigns Tools allows you to create brand-level email campaigns to send to your organizations' collective contact lists.



Brand-level campaigns only collect engagement data such as opens, clicks, unsubscribes, etc. unlike organization campaigns that detail proposed and invoiced revenue generation.

Assign New Leads

If you want to share new leads with franchisees from unowned territories. You can do so by sending an alert to ZEEs.

If the send lead notification box is checked, but no user is configured to receive that AND no email is in this lead notification field (in **Control Panel > Notifications**) then it doesn't go anywhere. What you could do to ensure that the org receives the notification is add the org's email into this field (or any applicable email.)

Texting Notifications

New Text Notification ☐ Send email when new text is received

Lead Notifications

Send Leads via Email To

Mon

Tue

Out of Territory Warning

Warning zeos if they are out of territory. If the org you're in had territory ownership turned on, and you try to enter a zip owned by another org, you get the red banner.

Service Address

75025 is owned by Bob's Handyman - Plano

Q

2304 Dampton Drive, Plano, TX, USA

[Google](#)

Address 1

2304 Dampton Dr

Address 2

Community

Hunters Glen

City

Plano

State

TX

Zip

75025

Then in **Dashboard > Configuration**, if they have this turned on to warn, you get the yellow banner if it's a zip no one owns:

Territory Restrictions

Contacts



Allow adding contacts in postal codes owned by other organizations

Transactions



Allow creating transactions for contacts in postal codes owned by other organizations

Unowned Territories

Warn

Mode for handling contact postal codes not owned by an organization

Service Radius



Allow editing of Self Service Radius

National Accounts

Service Address

You don't own the 28801 postal code



120 Coxe Avenue, Asheville, NC, USA

[Google](#)

Address 1

120 Coxe Ave

Address 2

Community

South Slope Brewing District

City

Asheville

State

NC

Zip

28801

Brand-Wide Email Reporting

There are roll-up reporting that shows at the brand-level for email campaigns. You will want to review **Revenue by Lead Source**.
