

The Lead File - An Overview

Last Modified on 04/29/2024 12:48 pm EDT

Located in the Families menu, Jackrabbit's **Lead File** is a simple contact management system that maintains family information separately from your main Jackrabbit system. It's a great place to maintain and market to dormant customers and prospective customers.

Enter prospective customer information directly to the Lead File.

Archive inactive families from your main Jackrabbit system individually or in mass.

Email families individually or in mass based on specific search criteria.

Work with Lead File data - export to Excel or print mailing labels.

Permissions control the ability of your Users to see certain data and take specific actions. Before moving forward review [User Permissions for the Lead File](#).

Main contact information for the Billing Contact

One student is listed in each Lead File record

Family user-defined fields

Notes include last class enrollment

Contact information from Family record > Summary tab

Miscellaneous Family information

Families stored in the Lead File don't impact your Jackrabbit subscription fees. You can maintain an unlimited number of families there without any extra cost. If you process credit card payments in Jackrabbit, consider the [PayPath](#) option, which can completely offset your subscription fees!

Frequently Asked Questions

Q. *Can the families in the Lead File use the Parent Portal?*

A. No. Families/Contacts in your Lead File do not have an email address in your main Jackrabbit system. Therefore, they can't access the Portal. Refer to [Restore a Lead to your Main Database](#) article to enable a family in your Lead File to use the Parent Portal.

Q. *What about student enrollment? Is that information accessible when a family has been moved to the Lead*

File?

A. Yes. If you run an Enrollment Detail report, Enroll History report, or Drop History report, the student enrollment information is included in the report. The word archived is shown next to the student's name to indicate they are in the Lead File.

Families archived in your Lead File are not searched in the duplicate detection process. If a family you have archived to the Lead File registers again with you online, Jackrabbit will not detect them as a duplicate, and a new family record will be created. The Lead File record should be restored, and the accounts should be merged.
