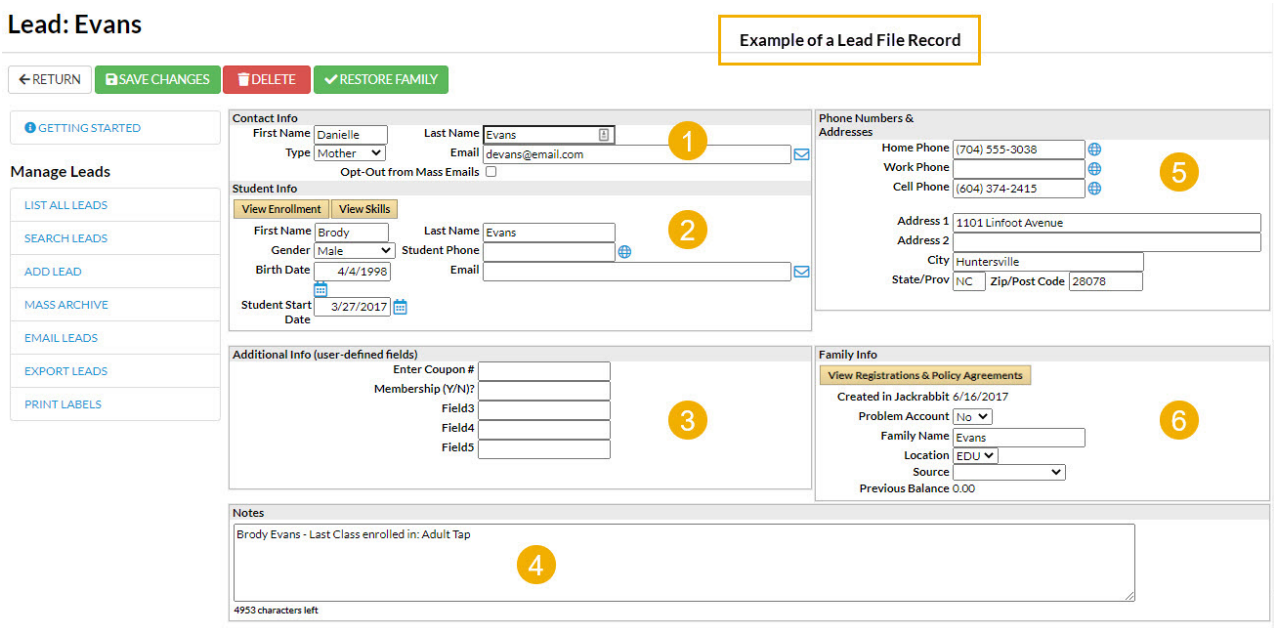
The Lead File - An Overview Share

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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.



1. Main contact information for the Billing Contact
2. One student is listed in each Lead File record
3. Family user-defined fields
4. Notes include last class enrollment
5. Contact information from Family record > Summary tab
6. 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.

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.