Families Archived to the Lead File - What Information is Retained?

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When you archive a Family from your main system into the Lead File, not all information is retained.

The following information is retained when a family is archived and is viewable in the Lead File. These fields will be added back to a family's record if they are restored to your main system.

Billing Contact - **from the Billing Contact page**	- First & Last Name - Type (mother, father, etc.) - Email Address and Opt-Out from Mass Emails Status - Home/Work/Cell Phones and Text Opt-In Status (if texting enabled)
Student - from the Student record (Summary and Classes tabs)	- First & Last Name - Gender - Birth Date - Phone - Email Address - Student's Past Enrollment* *Families sent to the Lead File on or after 11/11/2015. Student enrollment information will be included in the Enroll History report, Enrollment Detail report, and Drop History report.*
Family - from the Family record (Summary and Misc tabs)	- Family Name - Location - Problem Account Status - Previous Balance - Registration Agreement(s) - Family User-defined Fields - Source

Only the Billing Contact is retained in the Lead File. Any additional contacts will be included in the **export** that is done as part of the archiving process. They will need to be added back into the Family record manually if the family is restored to your main system.

Additional Information Retained

The following information is NOT viewable in the Lead File, however, it IS retained in the archiving process and will be added back to the Family record if you restore the family to the main system.

If you need to see this information you can either refer to your Excel export or you can restore the family so that you are able to view this data. Optionally, you can then archive the family back to the Lead File.

- Transaction History (with the exception of deleted transactions)
- Student's Absence or Attendance History**
- Student Skills*
- Resources added to the Student or Family record
- Notes from the Family record
- Policy Agreement History (information can be found in the *Family* record > *Misc* tab > *View Registrations* button > click *View* to see the legal policies agreement details

Families sent to the Lead File on or after 11/11/2015
**Families sent to the Lead File on or after 4/5/2016*

Transaction history is not visible within the Lead File, but a family's transactions are left intact in your system to preserve your revenue history/transaction history. An archived family's transactions ARE included in all financial reporting in your main system, even while the family is in the Lead File.

What the Lead File Doesn't Keep

The following information is NOT retained when a family is archived and is not viewable in the Lead File. These fields will NOT be added back to a family's record if they are restored to your main system:

- All Contact information for non-Billing Contacts (**only billing contact information is retained**)
- Additional Billing Contact information (ex. Employer, Portal User ID, Birth Date, etc.)
- Additional Student information (ex. Medical information, Student Fixed Fee, User-defined Fields, etc.)
- Additional Family information (ex. Credit Card/Bank Account information, Family Fixed Fee, Family Discount, etc.)
- Deleted Transactions

This information is all included in the**export** to Excel during the archiving process. It is a Jackrabbit Best Practice to run the export to Excel to ensure that you have a record of all of the family's information in the anticipation that they may return to your organization in the future.

Export to File

When families are archived to the Lead File, the process involves (optionally) exporting the family data to Excel prior to the archive. **It is highly recommended that you complete the Export to File step.**

The data is exported to an Excel workbook and includes:

- Family, Student, and Contact data
- Transaction History
- Enrollment History
- Attendance or Absence History
- Online Registration History

In the Excel workbook, there are separate tabs for Families, Students, Contacts, Transactions, Enrollment, Attendance, and Web (Online) Registrations. On each of the sheets, the columns display the family information.

Sample Excel Backup File