

# Archive Multiple Families to the Lead File (Mass Archive)

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In addition to [moving an individual family to the Lead File](#) Jackrabbit offers the option of moving groups of inactive families to the Lead File based on specific criteria.

Families with any Event enrollment within the last 30 days will not be included in the list of families to mass archive. These families can be moved to the lead file [individually](#) if needed.



Student enrollment information is maintained in the Lead File and will be included in the [Enroll History](#) report, [Enrollment Detail](#) report, and [Drop History](#) report with the exception of families archived prior to 11/11/2015.

## Archive Inactive Families to the Lead File

1. Go to **Families** (menu) > **Lead File**.
2. Choose **Mass Archive** from the left menu.
3. Define which inactive families you'd like to archive (move out of your Jackrabbit database into your Lead File) by selecting criteria including:
  - o *Location*
  - o *Families Created Prior to* (select a date)
  - o *Families without a student enrolled since*(select a date, **looks at Class enrollments only**)
  - o *Families without a transaction since*(select a date)
  - o *Families imported on* (select a date)
  - o *Balance* (Zero Balance Only, Zero & Credit Balances Only, Credit Balances Only, Balance > 0, Any Balance)
  - o *Include Problem Accounts* (Yes or No)

## Mass Archive to Lead File

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**Manage Leads**

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**Archive Families - Step 1 of 4 - Search Inactives to be archived.**  
Archive Inactive Families to lead file using the criteria below.  
**NOTE:** You will have a chance to preview the families you will be archiving on the next screen.

Location

Families created prior to

Families without a student enrolled since

Families without a transaction since

Families imported on

Balance

Include Problem Accounts

Use the Search Criteria to select a group of families to mass move to the Lead File.

4. Click **Next**.
5. Select **Preview Families to Archive** in the pop-up window.

Mass Archive to Lead File

Not all family, student, and contact information is retained in the Lead File, so it is **HIGHLY RECOMMENDED** to export the family data prior to archiving the family to the Lead File.

For more information on what family data is maintained in the Lead File, refer to the [Help Center](#).

6. Preview the list and select/clear rows as needed. Only selected family rows will move to the Lead File.
7. Click **Confirm List**.
8. Click **Export to File** to export the data to Excel. *This step is not mandatory but is highly recommended.*
9. After exporting to Excel, click **Perform the Move to the Lead File**
10. Click **OK**.



Any family with an inactive student that is waitlisted or future enrolled in a class will not be mass archived. This family will have to be moved to the lead file **individually** if needed.