

Add a Family Directly to the Lead File

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Adding a family directly to the Lead File offers you the option of maintaining prospective customer information without incurring additional Jackrabbit subscription fees.

Add a Family to the Lead File

1. Go to the **Families** (menu) > **Lead File**.
2. Click **Add Lead** in the left menu.
3. Enter **Family Name**.
 - o If the name sounds familiar to you, consider clicking the **Duplicate?** button on the right. This will tell you if the family name you've entered duplicates a family name already in your Lead File.
4. Enter an **Email** for the family.
5. Click **Save** or **Save & Add Another Lead** to create the Lead File record.
6. Add any additional information in the newly created Lead File record.
7. Click **Save Changes**.

The screenshot displays the 'Search Leads' interface. On the left, a navigation menu includes 'GETTING STARTED', 'Manage Leads', and several options: 'LIST ALL LEADS', 'SEARCH LEADS', 'ADD LEAD' (highlighted with a yellow background and a hand cursor), 'MASS ARCHIVE', 'EMAIL LEADS', 'EXPORT LEADS', and 'PRINT LABELS'. A yellow arrow points from the 'ADD LEAD' button to a modal window titled 'Add Lead'. The modal contains a 'Family Name' input field with a 'Duplicate?' button to its right, an 'Email' input field with an email icon, and three buttons at the bottom: 'Save', 'Save & Add Another Lead', and 'Cancel'. Below the modal, the background text includes a 'Getting Started' section and instructions on how to create leads.

Note: If you are adding a family to the Lead File with more than one student, first add them to your main Jackrabbit database and then use the Lead File button to archive the Family record to the Lead File.