

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**.

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