The Lead File - An Overview

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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.

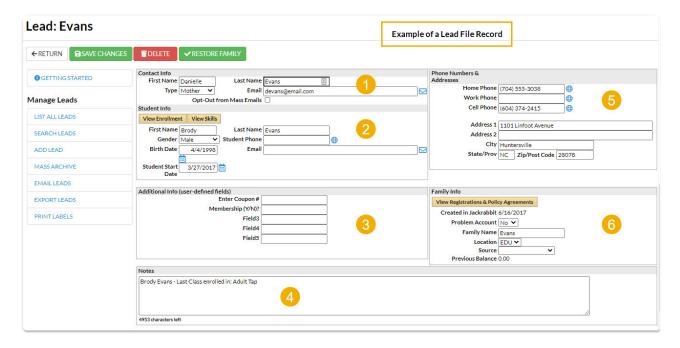
Jackrabbit's *Lead File* is a simple contact management system that maintains family information separately from your regular Jackrabbit database. It's a great place to maintain and market to dormant customers and prospective customers.

The Lead File is located under the Families (menu) > Lead File and allows you to:

- ★ Directly enter prospective customer information
- Move (or archive) inactive families individually or in mass
- 🜟 Email families individually or in mass based on specific search criteria
- * Export data to Excel
- rint mailing labels
- Restore (or move) families back into your main Jackrabbit database



Families in the Lead File are <u>NOT part of your Jackrabbit subscription fees</u> and you can maintain an unlimited number of families in the Lead File without increasing your subscription fee!



- 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.

Expand/Collapse All

Frequently Asked Questions



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 merged.