

# 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
- ★ Print mailing labels
- ★ Restore (or move) families back into your main Jackrabbit database



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

**Lead: Evans** Example of a Lead File Record

← RETURN SAVE CHANGES DELETE RESTORE FAMILY

**GETTING STARTED**

**Manage Leads**

- LIST ALL LEADS
- SEARCH LEADS
- ADD LEAD
- MASS ARCHIVE
- EMAIL LEADS
- EXPORT LEADS
- PRINT LABELS

**Contact Info**

First Name  Last Name  1

Type  Email  ✉

Opt-Out from Mass Emails ☐

**Student Info**

View Enrollment View Skills

First Name  Last Name  2

Gender  Student Phone  ✉

Birth Date

Email  ✉

Student Start Date  📅

**Additional Info (user-defined fields)**

Enter Coupon #

Membership (Y/N)?

Field3

Field4

Field5

3

**Phone Numbers & Addresses**

Home Phone  ✉

Work Phone

Cell Phone  ✉ 5

Address 1

Address 2

City

State/Prov  Zip/Post Code

**Family Info**

View Registrations & Policy Agreements

Created in Jackrabbit

Problem Account  6

Family Name

Location

Source

Previous Balance

**Notes**

Brody Evans - Last Class enrolled in: Adult Tap 4

4953 characters left

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.

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**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.

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