

The Lead File - An Overview

Last Modified on 03/16/2021 1:35 pm EDT

Watch a (2:06) video tutorial on the Lead File



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 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

Addresses

Home Phone 5

Work Phone

Cell Phone

Address 1

Address 2

City

State/Prov Zip/Post Code

Family Info

[View Registrations](#)

Created in Jackrabbit 6/16/2017

Problem Account 6

Family Name

Location

Source

Previous Balance 0.00

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.