Families Archived to the Lead File - What Information is Retained?

Last Modified on 11/03/2020 12:31 am EST

When you archive a Family from your main database into the Lead File, not all information is retained.

What the Lead File Keeps

The following information is retained when a family is archived and is viewable in the Lead File. These fields will be added back to a family's record if they are restored to your main database.

Billing Contact - from the Billing Contact page

- First & Last Name
- Type (mother, father, etc.)
- Email Address and Opt-Out from Mass Emails Status
- Home / Work / Cell Phones and Text Opt-In Status (if texting enabled)

*Only the Billing Contact is retained in the Lead File. Any additional contacts will be included in the **export** that is done as part of the archiving process. They will need to be added back into the Family record manually if the family is restored to your main database.*

Student - from the Student record (Summary, Classes and Skills tabs)

- First & Last Name
- Gender
- Birth Date
- Phone
- Email Address
- Student's Past Enrollment*
- Student Skills*

**Families sent to the Lead File on or after 11/11/2015.*

A Student's past enrollment data IS retained in the Lead File and will restore to the Family record, however, historical enrollment reporting does NOT include Lead File families. While the Family is in the Lead File their enrollment history will NOT be included in any enrollment reports run in your main database. It is recommended you run any enrollment reports you need before sending Families to the Lead File.*

Family - from the Family record (Summary and Misc tabs)

- Family Name
- Location
- Problem Account Status
- Previous Balance
- Registration Agreement(s)
- Family User-defined Fields
- Source

What the Lead File Doesn't Keep

The following information is NOT retained when a family is archived and is not viewable in the Lead File. These fields will NOT be added back to a family's record if they are restored to your main database:

- All Contact information for non-Billing Contacts **(only billing contact information is retained)**
- Additional Billing Contact information (ex. Employer, Portal User ID, Birth Date, etc.)
- Additional Student information (ex. Medical information, Student Fixed Fee, User-defined Fields, etc.)
- Additional Family information (ex. Credit Card/Bank Account information, Family Fixed Fee, Family Discount, etc.)

This information is all included in the export to Excel during the archiving process. It is a Jackrabbit Best Practice to run the export to Excel to ensure that you have a record of all of the family's information in the anticipation that they may return to your organization in the future.

The following information is NOT viewable in the Lead File, however, it IS retained in the archiving process and will be added back to the family record if you restore them to the main database.

If you need to see this information you can either refer to your Excel export or you can restore the family so that you are able to view this data. Optionally, you can then archive the family back to the Lead File.

- Transaction History
- Student's Absence or Attendance History**

***Families sent to the Lead File on or after 4/5/2016.*

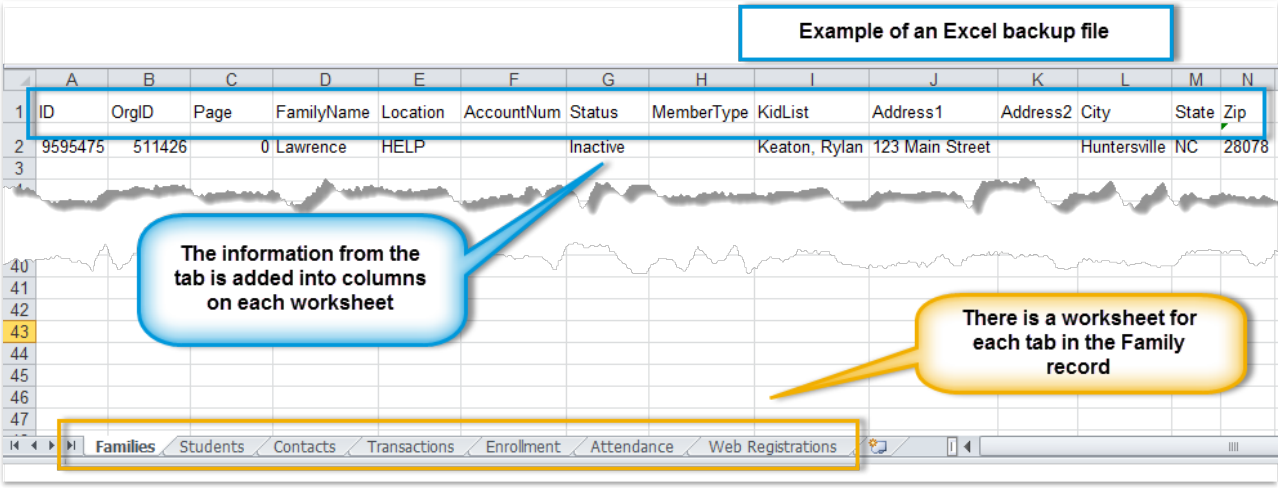
Transaction history is not visible within the Lead File, but a family's transactions are left intact in your database to preserve your revenue history/transaction history. An archived family's transactions ARE included in all financial reporting in your main database, even

while the family is in the Lead File.

Export to File

When families are archived to the Lead File, the process involves (optionally) exporting the family data to Excel prior to the archive. **It is highly recommended that you complete the Export to File step.**

The data is exported to an Excel workbook and includes:

- Family, Student, and Contact data
- Transaction History
- Enrollment History
- Attendance or Absence History
- Web Registration History

In the workbook there is a sheet for each tab in the Family record. On each of the sheets, the columns display the information from all of the fields on that tab in the Family record.