

Add a Family Directly to the Lead File

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

[Watch a video tutorial on Adding Leads to the Lead File](#)

Adding a family directly to the Lead File offers you the option of maintaining prospective customer information without incurring additional Jackrabbit subscription fees.

To add a family directly to the Lead File:

1. Go to **Families > Lead File**.
2. In the left menu, choose **Add Lead**.
3. Enter **Family Name**.
4. 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.
5. Enter an **Email** for the family.
6. Click **Save** or **Save & Add Another Lead** to create the Lead File record.
7. In the newly created Lead File record, add any additional information and **Save Changes**.

The screenshot shows a web interface titled "Search Leads". On the left is a sidebar menu with a "Return" button at the top. Below it, under the heading "Click an item below", are several options: "Getting Started", "List All Leads", "Search Leads", "Add Lead", "Mass Archive", "Email Leads", "Export Leads", and "Print Labels". The "Add Lead" option is circled in yellow. A yellow callout bubble points to this button with the text: "Use Add Lead to add prospective customer information directly into the Lead File". The main content area on the right has a "Getting Started" section. It begins with the text "The Lead File provides you with the ability to:" followed by a bulleted list: "• Store & track prospective customer information", "• Mass email leads", and "• Mass export leads". Below this, it states "You can keep an unlimited number of leads in the lead file without it increasing your Jackrabbit subscription." At the bottom of the main area, it says "Information tracked per Lead: Billing Contact Name, Phone, and Email, Family Address, Family Notes."

Note: If you are adding a family to the Lead File with more than one student, first add them to your main

Jackrabbit database and then use the Lead File button to archive the Family record to the Lead File (see Move One Family from your Database below).
