Add a Family Directly to the Lead File

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.**

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).*