

Archive One Family to the Lead File

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Watch a (0:28) video tutorial on Adding Leads and Moving Families - ***Archive One Family to the Lead File***

To add a family that exists in your Jackrabbit database into the Lead File:

1. Find the Family and ensure that no student in the family is actively enrolled in a class. If a student is actively enrolled in a class, they must be dropped prior to moving the Family to the Lead File.
 2. Click the **Archive Family** button in the Family's Record.
 3. In the *Archive Family to Lead File* window, select **Export to File**.
 4. Export the data to Excel and save the exported Excel file to your computer.
 5. After saving the exported data, return to Jackrabbit and click the **Archive Family to Lead File** button.
 6. When prompted, click **OK**.
 7. A Lead File record is created for each student in the family.
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Families
Students
Classes
Events
Staff
Transactions
Store
Reports
Staff Portal
Tools

Jackrabbit

Family: Norman

Return
Save Changes
Delete

Make Sale/Post Fees
Payment
Refund
Statement
Add Student
Add Contact
Archive Family
Family Name
Email
Email Schedules
Merge Family

Summary
Contacts
Classes
Events
Transactions
Billing Info
Misc

Primary Contacts

View 1 - 2 of 2
Print
Refresh

Contacts	Type	Home Phone	Work Phone	Cell Phone	Email	Bill	Login	Portal UserID	Last Login
Jane Norman	Mother	(704) 555-3844		(704) 555-9952	jnorman@email.com	Yes	Yes	jnorman@email.co	
Richard Norman	Father	(704) 555-3894		(704) 555-7489	rnorman@email.com	No	Yes	rnorman@email.co	

Students

View 1 - 3 of 3
Print
Refresh

First Name	Last Name		Active	Gender	Birth Date	Age		F. Enroll	Wait
Alex	Norman	Enroll	N	Male	9/20/2008	7 yrs, 10 mths		0	
Carter	Norman	Enroll	N	Male	9/20/2008	7 yrs, 10 mths		0	
Sarah	Norman	Enroll	N	Female	10/17/2004	9 yrs, 9 mths		0	

NOTE: All students in the family must be Inactive (NOT currently enrolled) in order for the family to be eligible to be moved to the Lead File.

Location: JRHC
Registration Date: 4/27/2016
Status: Inactive
(auto-updated based on enrolled students)
Account#:
Home Phone: (704) 555-3844



If the Family has more than one Student, a **separate** Lead File record will be created for **EACH** Student.