Archive Multiple Families to the Lead File (Mass Archive)

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Watch a (1:16) video tutorial on Adding Leads and Moving Families

In addition to **moving an individual family to the Lead File**, Jackrabbit offers the option of moving groups of inactive families to the Lead File based on specific criteria.



*Families with any Event enrollment within the last 30 days will not be included in the list of families to mass archive. These families can be moved to the lead file **individually** if needed.*

To mass move/archive inactive families from your Jackrabbit database to the Lead File:

1. Go to **Families > Lead File**.
2. In the left menu, choose **Mass Archive**.
3. Define which inactive families you'd like to archive (move out of your Jackrabbit database into your Lead File) by selecting criteria including:
   Location
   Families Created Prior to a specific date
   Families that have not had a student enrolled since a specific date *(looks at Class enrollments only)*
   Families that have not had a transaction since a specific date
   Families Imported on a specific date
   Balance (Zero Balance Only, Zero & Credit Balances Only, Credit Balances Only, Balance > 0, Any Balance)
   Include Problem Accounts Yes or No
4. Click **Next**.
5. In the *Mass Archive to Lead File* pop-up window, select **Preview to Archive**.
6. Preview the list and check rows/uncheck rows as needed. Only checked family rows will move to

the Lead File.

7. Click **Confirm List**.
8. Click **Export to File** to export the data to Excel. *This step is not mandatory but is highly recommended.*
9. After exporting to Excel, click **Perform the Move to the Lead File**
10. Click **OK**.

