The Lead File - An Overview

Last Modified on 12/04/2018 2:06 pm EST

Watch a (2:06) video tutorial on the Lead File

Jackrabbit's *Lead File* is a simple contact management system that maintains family information separately from your regular Jackrabbit database. It's a great place to maintain and market to dormant customers and prospective customers.



Families in the Lead File are<u>NOT part of your Jackrabbit</u> <u>subscription fees</u>, and you can maintain an unlimited number of families in the Lead File without increasing your subscription

fee!

The Lead File allows you to:

- Directly enter prospective customer information
- Move (or archive) inactive families individually or in mass
- Email families individually or in mass based on specific search criteria

- Export data to Excel
- Print mailing labels
- Restore (or move) families back into your main Jackrabbit database

Click an Item Below Contact Info Cetting Started First Name: Lisa Last Name: Smith Home Numbers & Addresses Home Phone: [704] 432-1127 Contact Informati	Jackrabb		Lead: Smith	Example of a Lead File reco	ord relp
Cetting Statied Last Al Leads Search Leads Add Lead Mass Achive Emplaticads Export Leads Print Leads First Name: Lia Last Name: Smith Type: Mother Contact Informatic Final Leads Contact Informatic Work Phone: Contact Informatic Work Phone: Contact Informatic Final Leads Student Info Opt-Out from Mass Emails: Contact Informatic (multi-email example: email 1; email); Student Info Contact Informatic Final Leads Contact Informatic Work Phone: Contact Informatic Get Phone: Contact Informatic Final Leads Student Info First Name: Ashey Gender: Female * Last Name: Smith Email: Birth Date: (7)02002 Last Name: Smith Email: Birth Date: (7)02002 Contact Informatic Final Leads Contact Informatic Final Leads Student Info Vew Emolinent Vew Stills Final Leads					
List All Leads Add Lead Mass Acthe Add Lead Mass Acthe Export Leads Image mail is asgemal com (mail email example email); email); Sudent Info Switch Info Contact informatic Family record 5 km Sudent Info Switch Info Contact informatic (mail email example email); email); Address 1: 5703 McTavch Rd Switch Isads First Name: Appley Last Name: Smith Address 2: Christian Code: 28178 Student Info Student Sint Date: //202002 Enail: Student Prove: No Zip/Post Code: 28178 Miscellaneous Family Information Student Sint Date: //202002 Enail: Fields: Fields: Student Sinth Miscellaneous Family Problem Acount: No · Family user-defined fields Fields: Fields: Fields: Fields: Miscellaneous Family Problem Acount: No · Miscellaneous Family Problem Acount: No · Miscellaneous Family Problem Acount: No · Notes Notes Notes Survey: Referral · Previous Balance 0.0			· · · · ·		
Sacrati Laads Add Lad Mds Add Lad Mass Advited Email Lads Export Lads First Name; Sale Birth Date; 7/302/002 Student Start Date: 4/28/2015 Student Start Date: 4/28/2015 Student Start Date: 4/28/2015 Dree Student listed in each Lead File record Additional Info (user-defined fields) Fersities - Yes or No?; Yes Fields:		First Name: Lisa	Last Name: Smith	Home Phone: (704) 432-1127	Contact information from
Sadd additional lafe didentional lafed fields Current of the sample email (current) emails (curr		Type: Mother •	Email: lisa@email.com	Work Phone:	Family record > Summary tab
Nass Achive Email Leads Cpt-Out from Mass Emails: Address 1: 5703 McTavah Rd Export Leads First Name: Achiev Student Info Address 2: Student Start Date: 7002002 Address 2: Student Phone: Student Start Date: 702002 Email Leads First Name: Smith Student Start Date: 7202002 One Student Phone: State Prov: NC Student Start Date: 7202002 Email Lead File record Family Info Additional Info (user-defined fields) Field2: Fi			(multi-email example: email1; email2)	Cell Phone:	r anny record + caninary ab
Email Leads Export Leads Misee Encollineant View Skills Address 1: [570 Micrash Rd First Name: Active First Name: Active Gender: Female * Last Name: Smith Gender: Female * Address 2: [570 Micrash Rd Student Site Drox: 7/00/2002 Email: (multi-email example email); email/ (multi-email example email); email/ Student Site Drox: 7/00/2002 First Name: Active Site Drox 1/2 (Site Drox 1/2 (Opt	I-Out from Mass Emails:		
Export Leads View Emoliment [wew Suits] First Name: Addrey Last Name: Smith Gender: Frander * Student Phone: Birth Date: (7/02/002) Email: Student Start Date: 4/28/2015 One Student listed in each Lead File record Additional Info (user-defined fields) Fields: Family Info View Registrations Family user-defined fields Fields: Fields: Fields: <t< td=""><td></td><td>Student Info</td><td></td><td>Address 1: 5793 McTavish Rd</td><td></td></t<>		Student Info		Address 1: 5793 McTavish Rd	
First Name: Addity List Name: Smith Gender: Frendle * Student Prov: NC Birth Date: (7/30/2002) Email: Student Start Date: 4/28/2015 One Student listed in each Lead File record Additional Info (user-defined fields) Field2: Family user-defined fields Field2: Field3: Field3: Field4: Field3: Field5: Source: [Referral View Registrations Miscellaneous Family information Problem Recourt: [No * Source: [Referral Notes Notes	Export Leads	View Enrollment View Skills			
Gender: Formale • Student Phone: State/Prov: NC 2/p/Post Code: 20178 Birth Date: 7/30/2002 Email: (multe-email example: email ; email): Student Start Date: One Student listed in each Lead File record Family Info Additional Info (user-defined filed) Field2: Field2: Family Info Family user-defined fileds Field2: Field2: Field2: Field3: Field3: Field3: Field3: Field4: Field3: Field3: Field3: Field5: Source: Referral • Previous Balance 0:00 Previous Balance 0:00	Print Labels	First Name: Ashley	Last Name: Smith	City: Dabbitfoote	
Birth Date: [7/30/2002] Email: [multi-email example: email 1; email2] Student Start Date: 4/28/2015 One Student listed in each Lead File record Additional info (user-defined fields) Field2: Femily user-defined fields Field3: Field3: Field3: Field4: Field3: Field5: Source: [Referral] • Notes Miscellaneous Balance 0.00					
Student Start Date: 4/29/2015 One Student ised in each Lead File record Family Info Additional Info (user-defined fields) Field2: Field2: Family user-defined fields Field2: Field2: Field3: Field3: Field3: Field3: Field3:				Zipir dat dotte. 20110	
Student Start Date: 4/28/2015 One Student listed in each Lead File record Additional Info (user-defined fields) Rectals - Yes or NO?: Yes Field2 Field2 Family user-defined fields Field2 Field3 Problem Account: [No * Field5 Source: [Referral * Notes		1/30/2002			
Recitals - Yes or No:? Yes Iver Registrations Miscellaneous Family information Family user-defined fields Field3: Problem Account: [No • Field4: Field3: Field3: Field5: Field3: Field3: Field5: Source: [Refrant] • Source: [Refrant] • Previous Balance 0:00		One St			
Family user-defined fields Field2: Image: Control of the control of		Additional Info (user-defined fields)		Family Info	
Field2: Created in Jackrabbit: 11/13/2015 information Field3: Field4: Problem Account: [No • Field4: Field5: Created in Jackrabbit: 11/13/2015 Field4: Field5: Field6: Source: Referral • Previous Blance 0:00 Field6:				View Registrations	Miscellaneous Family
Family user-defined fields Fields: Problem Account: No • Fields: Fields: Fields: Fields: Source: [Referal • Previous Balance 0:00		Fi	eld2:	Created in Jackrabbit: 11/13/2015	
Fields: Fields: Contact in the LP v Source: Referral v Previous Balance 0.00		Fi Fi	eld3:		
Field6: Location: HELP * Source: Referral * Previous Balance 0:00 *		Family user-defined fields	eld4:		
Notes		Fi	eld5:		
Previous Balance 0.00 Notes					
Notes					
				Previous Balance 0.00	
Ashley Smith - Last Class enrolled in: Tap - Beginner		Notes			
Promoti of the second of the s		Ashley Smith - Last Class enrolled in: Tan - Beginner			
Notes include last Class enrollment			Notes include last Class enrollment		

There are six *User Permissions* required to work with the *Lead File*. All or some of these permissions must be active (checked) in **Tools > Manage Users and Permissions** in order to properly use Lead file functionality.

Families	Lead File - Access	V	Has access to view and search existing leads only
Families	Lead File - Manage		Has access to edit/archive/restore a lead.
Families	Delete Leads		Permission to delete lead from Lead File.
Families	Lead File - Email		Has access to email leads.
Families	Lead File - Mass Archive		Has Access to perform a mass archive
Families	Lead File - Export Leads		Has Access to export all leads to a file