

# The Lead File - An Overview

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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.



fee!

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

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

The screenshot displays the Jackrabbit Lead File record for 'Lead: Smith'. The interface is divided into several sections:

- Contact Info:** Fields for First Name (Lisa), Last Name (Smith), Type (Mother), Email (lisa@email.com), and Opt-Out from Mass Emails.
- Student Info:** Fields for First Name (Ashley), Last Name (Smith), Gender (Female), Birth Date (7/30/2002), Student Phone, and Email. A note indicates 'One Student listed in each Lead File record'.
- Phone Numbers & Addresses:** Fields for Home Phone, Work Phone, Cell Phone, Address 1, Address 2, City, State/Prov, and Zip/Post Code.
- Additional Info (user-defined fields):** A section for Recitals - Yes or No? and five user-defined fields (Field2-Field6).
- Family Info:** Fields for Created in Jackrabbit, Problem Account, Family Name, Location, Source, and Previous Balance.
- Notes:** A text area containing the note 'Ashley Smith - Last Class enrolled in: Tap - Beginner'.

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