

Archive Multiple Families to the Lead File (Mass Archive)

Last Modified on 03/31/2021 3:12 pm EDT

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**.

The screenshot displays the 'Mass Archive to Lead File' interface. At the top, there is a navigation bar with tabs for Families, Students, Classes, Events, Staff, Transactions, Store, Reports, Staff Portal, and Tools. Below this is a search menu with options like 'List Active Families', 'List All Families', 'Add Family', and 'Lead File'. The main content area is titled 'Mass Archive to Lead File' and includes a 'Help' button and a 'Send Idea' button. The primary section is 'Archive Families - Step 1 of 4 - Search Inactives to be archived.' It contains the following search criteria:

- Location: [Dropdown]
- Families created prior to: 6/1/2018 [Calendar icon]
- Families without a student enrolled since: [mm/dd/yyyy] [Calendar icon]
- Families without a transaction since: [mm/dd/yyyy] [Calendar icon]
- Families imported on: [mm/dd/yyyy] [Calendar icon]
- Balance: Zero Balance Only [Dropdown]
- Include Problem Accounts: No [Dropdown]

A yellow callout box on the right side of the search criteria section contains the text: "Use Search Criteria to choose a group of families to mass move to the Lead File". At the bottom of the search criteria section is a 'Next >>' button.