

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

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First Name	Last Name	Enroll	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	10/17/2006	9 yrs, 9 mths	0	

Location: JRHC

Registration Date: 4/27/2016 Status: **Inactive** (auto-updated based on enrolled students) Account#: _____

Home Phone: (704) 555-3844

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.

Click Archive Family to move an Inactive family to the Lead File.



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