## Archive Multiple Families to the Lead File (Mass Archive)

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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.



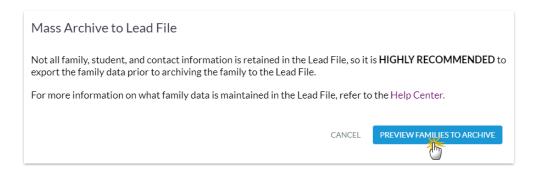
Student enrollment information is maintained in the Lead File and will be included in the Enroll History report, Enrollment Detail report, and Drop History report with the exception of families archived prior to 11/11/2015.

## Archive Inactive Families to the Lead File

- 1. Go to Families (menu) > Lead File.
- 2. Choose Mass Archive from the left menu.
- 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 (select a date)
  - Families without a student enrolled since(select a date, looks at Class enrollments only)
  - Families without a transaction since(select a date)
  - Families imported on (select a date)
  - Balance (Zero Balance Only, Zero & Credit Balances Only, Credit Balances Only, Balance > 0, Any Balance)
  - Include Problem Accounts (Yes or No)

## Mass Archive to Lead File ← RETURN Archive Families - Step 1 of 4 - Search Inactives to be archived. **6** GETTING STARTED Archive Inactive Families to lead file using the criteria below. NOTE: You will have a chance to preview the families you will be archiving on the next screen. Manage Leads Location LIST ALL LEADS Use the Search Families created prior to 7/29/2020 Criteria to select a SEARCH LEADS Families without a student enrolled since mm/dd/yyyy iii group of families to mass move to Families without a transaction since mm/dd/yyyy iii ADD LEAD the Lead File. Families imported on mm/dd/yyyy MASS ARCHIVE Balance Zero Balance Only ~ **EMAIL LEADS** Include Problem Accounts No ✔ **EXPORT LEADS** ✓ Next >> PRINT LABELS

- 4. Click Next.
- 5. Select **Preview Families to Archive** in the pop-up window.



- 6. Preview the list and select/clear rows as needed. Only selected 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**.



Any family with an inactive student that is waitlisted or future enrolled in a class will not be mass archived. This family will have to be moved to the lead file **individually** if needed.