



Maximizing the Re:Vive Program:

Webinar 1: Capture Your Team Data

Using SUCCESS TRACKER and Excel for a Targeted Strategy

- **GENERAL OBJECTIVE:** to review how to select Success Tracker data and move it to Excel.
- **SPECIFIC OBJECTIVE (Webinar 1):** to select your team data information and save it your personalized Excel file for your permanent records.
- **PROCESS:** Our 4-Step Process for working with Success Tracker data:

GET IT! MOVE IT! SORT IT! APPLY IT!

Have Success Tracker & Excel Open

A. GET IT!

1. In Success Tracker, select the “Genealogy group” from the left-hand menu.
2. Select the “Genealogy” report from this group.
3. In “Step 1” of the Genealogy report:
 - a. Enter your Country
 - b. Enter your Account Number (or the Account number of the leg, group or leader whose data you want to save.)
 - c. Now skip down to “Step 4” in the Genealogy report.
4. In “Step 4,” you will “customize” the information you want to save for your permanent records.
 - a. Click on “Selected Columns” which opens all your options for information to choose.
 - b. Uncheck “Select/Deselect All” at the top) to clear out the default choices.
 - c. Select these suggested columns OR revise to your own preferences.

Account Number	Physical Level
Country	Phone Numbers
Last Name	Terminated
First Name	Enrollment Level
Business Name	Leadership Level
Address 1	Highest Leadership Level
Address 2	Auto Order
City	Career Purchases (Cumulative QV)
State or Province	Last Order Period
Postal Code	Next Automatic Order Date
Sponsor Name	Email
Enroller Name	Orders in Prior 6 BPs

- d. After checking your selections, click on “Continue to Next Step.”

5. In “Step 5” of the Genealogy report:
 - a. Open the drop down box and select “Tab Delimited.”
 - b. Click on “Show Report.”

B. MOVE IT!

1. Select the “Edit” menu from the top.
2. To highlight ALL the data, choose “Select All” [or Ctrl A]
3. To COPY the data (that is, hold in memory), select “Copy” [or Ctrl C]
4. Move to your Excel spreadsheet (which should be open)
5. PASTE the data by placing your cursor in the top left (A-1) cell, and select the “Paste” button (in the top left hand corner) [or Ctrl V]
6. Using the “Save As” button, you will want to SAVE this as a document in your own filing system.