Introduction to Success Tracker

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1. Introduction to Success Tracker

This is your first step toward learning to use Success Tracker to manage your Mannatech business more efficiently and effectively.

Benefits of Using Success Tracker to Manage Your Organization

You can:
- Maximize your income potential
- Monitor business activity in your downline
- Know who to motivate, recognize, and assist
- Watch for trends
- Add more free time to your schedule
- Show leadership by example
- Coach your downline with simultaneous access to the same information.

Success Tracker Features

- Track activity and inactivity in your downline organization.
- See information that is updated daily.
- Access the system easily on www.mannatech.com.
- Use Success Tracker anywhere you have access to the Internet.
- Access information about any Associate in any country through a seamless interface 24-7.
- Use Success Tracker to distribute custom email messages to specific sets of Associates in your downline, according to their email preferences. (Premium)
- Print mailing labels to assist you in communicating with your downline. (Premium)
- Select from two service levels: Complimentary and Premium (see page 9).

2. Software Requirements

You will need the following to access Success Tracker:

- A current Internet browser – recommended versions:
  - Windows Users: Microsoft Internet Explorer 8.0 or higher, Mozilla Firefox 5.0 or higher, Chrome 10+
  - Macintosh Users: Apple Safari 5.0 or higher, Mozilla Firefox 5.0 or higher

- An Internet connection (modem speed of 56K bits per second or faster, DSL or cable modem is recommended)

- Adobe Acrobat Reader to print reports. There is an “Adobe - Get Acrobat Reader” icon displayed anywhere you choose to print a report from within Success Tracker.

- Success Tracker can be accessed when logged in to www.mannatech.com.
3. Subscribing to Success Tracker

To subscribe to Success Tracker:

- Choose My Business/Success Tracker from the top navigation.
- Select a subscription level.

The Complimentary subscription level is available to you free of charge.

The Premium subscription level provides additional reports which help you see when an Associate needs extra help or should be recognized. Associates are automatically billed every month on the same day in which their initial subscription was created. For example, if a subscriber signed up on August 22, they would be billed the 22nd of every subsequent month. If you upgrade or downgrade your subscription, you will lose what time is left on the original subscription and will be immediately charged for the next 30 days. No refunds or credits will be issued.

Once you have subscribed, you can enter Success Tracker through Quick Links located on the dashboard or from under My Business/Success Tracker. Once in the Success Tracker system, detailed Help is available by clicking on Help in the top menu bar.

4. Success Tracker Home Page

The Success Tracker menu bar is located at the top of the home page.

- Success Watcher will link you to a list of all current “Alerts” that apply to your subscription level.
- Reports will take you to the Reports Overview page. All reports are listed in the left menu.
- Graphical Views will take you to the Graphical Views Overview page.

Customize My Success Tracker allows you to select how you want the following items to automatically display when you request a report:

- Number of Levels—Most reports automatically display 10 levels down of your organization; however, you can enter any number of levels. Leaving this field blank will return results for your entire downline.

- Number of Results—Most reports automatically return results for the first 10,000; however, you can enter a number. Leaving the field blank returns results for your entire downline.

- Specification Screen—you can choose to have either the Standard report request screen or the expanded Customize My Report request screen displayed automatically when you select a report. Choosing the Standard format uses the automatic settings for the report.

- Submenus—you can also select how you want the submenus in the left side navigation menu to display—only one category at a time, more than one category at a time, or open all categories.
Once you have selected and saved your default settings, you will still have the ability to change them for individual reports.

5. Alert Messages (Success Watcher)

The alert messages are categorized as follows:

Recognition Alerts (Watch Your Business Grow)

- New Associates and Preferred Customers, sorted by enrollment level during the current month
- New Directors, sorted by leadership level for the last month
- Top 5 Enrollers in the current month
- Leaders with the Highest % Increase in Volume in the previous month (Premium)

Opportunity Alerts (Opportunity Knocking)

- Auto Orders in Exception Status, as of the Current Date
- Associates 10% GPV Away from the Next Leadership Level this Month (Premium)

You can view the report results for the report Associated with each Alert by clicking on View Report next to the Alert of interest.

6. Reports Overview

The primary value of Success Tracker lies in the information it presents to you through the reports provided.

Associate Search
Associate Detail
Organizational Profile
Contact My Downline (Premium Only)

The remaining reports are organized into categories, as follows:

Incentives—Reports are updated for current incentive.

Genealogy
Genealogy
Unilateral Diagram – Tree View
Unilateral Genealogy Diagram

Renewal
Associates Due for Renewal

Recognition
New Associates and Preferred Customers
Top Enrollers
New Directors
Downline Leaders (Premium)
Leaders with the Highest % Volume Growth (Premium)

Marketing
Recent Buyers On/Not On Auto Order
Associates and Preferred Customers Who Did Not Order

Early Warning
Terminated Auto Orders
Auto Orders in Exception Status

Bonus Opportunity
Associates Who Dropped in Leadership Status (Premium)
Associates Close to Next Leadership Level (Premium)

Bonus Qualification
Near RealTime GPV
How to Get to the Next Leadership Level

7. Working the Reports

Displaying Reports

Click on the report name to select it. To view the default report, click on the Shop Report button at the top of the page. Designate search criteria for more specific information.

Specification Screens

Some reports allow you to choose between the Standard specification screen and the Customize specification screen.

Standard—if you usually run reports with their default settings, you can choose to have the Standard report request screen display automatically when you request a report. The standard screen allows you to change the Primary Associate and how the reports are displayed. Reports are automatically displayed in Web page format, however, if you want to print the results, the PDF format is a better choice.

Customize—too narrow the focus on the report results, the Customize My Report automatically displays all the options available for a report.

Step 1 on the Customize screen allows you to change the Associate who is at the top level of the report. This allows you to run the report for someone in your downline.

Step 2 allows you to customize the criteria (or rules) by which people will be selected. This may include limiting results to specific Names, Cities, States, Postal Codes, Area Codes, Levels, Legs, or number of results.
Step 3 allows you to select the order in which people will be listed. You can have the results sorted by any of the columns in the report.

Step 4 allows you to select the columns to be displayed in the results.

Step 5 allows you to select the format in which data will be arranged. The web page format is best for viewing the results on screen. The Acrobat PDF format is best for printing the results, and the Tab Delimited format is best for downloading the results into a spreadsheet or database application.

The Help links within the system provides detailed instructions on how to print each report.

Diagrams, graphs, and maps may have only the web page format available.

When you have finished your selections, click on Show Report to generate the report results. Selecting Reset will erase the criteria that you had previously selected and return to the default settings. Save Report Specifications saves your criteria selections so that you can use them again without having to reselect everything.

The time required to generate and display a report will vary greatly depending on the size of your downline organization, the complexity of the report selected, and your Internet connection speed.

Associate Detail Window

On the report results page, you can click on an Associate’s underlined account number to access detailed information about the Associate. The account number is a link to the Associate Detail window for that Associate.

This window can be closed after viewing or used to make the subject Associate the “Top” Associate for all subsequent reports, or as a starting point for tracing the Associate’s upline. If you are a Premium subscriber, you can send an email to this person from within Success Tracker.

Understanding Reports

“? Click Here for a Description of the Report and Business Tips for Using this Report” is included on the report criteria select screen. Click on the “?Click Here” link to gain a better understanding of the contents of the report and to learn how to use it in building your business.

8. Contacting People Listed on the Report (Premium)

The Contact the List feature provides you with the ability to send email to the people listed in the report results, based on their privacy selections, and/or print mailing labels. The contact feature provides an easy and efficient way to keep in touch with your downline.

- Update your privacy settings under Profile & Preferences on mannat...
Help within the system provides more detailed instruction in the use of email distribution and the printing of mailing labels.

9. Help Menu

- Click on “Help Menu” in the left navigation to access an index of topics with links to information on that topic.

- Click on “? Click Here” in the report screens to access the help on how to customize report criteria and also on how to use the report. The same “?Click Here” message is available at the beginning and end of each report when the results are displayed.

- Within the Help pages are links that take you to other parts of Help or to glossary entries which describe key terminology.

- Click Contact Us at the bottom of any screen to request help. A response to your question(s) can be expected within one working day.

Feedback

Use the Contact Us link at the bottom of any screen to make suggestions for improvement to:

- the system
- support materials
- Success Tracker service
Compare Success Tracker Features

- **SuccessTracker**
  All the great features

- **SuccessTracker Complimentary**
  Complimentary level available until Regional Leadership Level is met. (National for US/CA)

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### Opportunity Alerts

<table>
<thead>
<tr>
<th>Feature</th>
<th>Premium</th>
<th>Comp</th>
</tr>
</thead>
<tbody>
<tr>
<td>Auto Orders in Exception</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Associates who dropped in Leadership Status in the previous month with a commission run</td>
<td></td>
<td></td>
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<tr>
<td>Associates 10% GPV away from the Next Leadership Level this month</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Associates Close to Next Leadership Level</td>
<td></td>
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</tbody>
</table>

### Recognition Alerts

<table>
<thead>
<tr>
<th>Feature</th>
<th>Gold</th>
<th>Comp</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Associates and/or Preferred Customers this month</td>
<td></td>
<td></td>
</tr>
<tr>
<td>New Directors this month</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Top 5 enrolers this month</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Top Leaders (ranked by % Growth in GPV) in the previous month</td>
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<td></td>
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</tbody>
</table>

### Reports

<table>
<thead>
<tr>
<th>Feature</th>
<th>Gold</th>
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</thead>
<tbody>
<tr>
<td>Associate Search</td>
<td></td>
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<tr>
<td>Associate Detail</td>
<td></td>
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<tr>
<td>Organizational Profile</td>
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<tr>
<td>How to Qualify for the Incentive</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Associates Close to Qualifying for Incentive</td>
<td></td>
<td></td>
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<tr>
<td>Associates Who Have Qualified for the Incentive</td>
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</tbody>
</table>

### Genealogy Reports

<table>
<thead>
<tr>
<th>Feature</th>
<th>Gold</th>
<th>Comp</th>
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</thead>
<tbody>
<tr>
<td>Genealogy</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Unilateral Diagram - Tree View</td>
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<td></td>
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<tr>
<td>Unilateral Genealogy Diagram</td>
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### Renewal Reports

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<thead>
<tr>
<th>Feature</th>
<th>Gold</th>
<th>Comp</th>
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</thead>
<tbody>
<tr>
<td>Associates Due for Renewal</td>
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</table>

### Recognition Reports

<table>
<thead>
<tr>
<th>Feature</th>
<th>Gold</th>
<th>Comp</th>
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</thead>
<tbody>
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<td>New Associates and Preferred Customers</td>
<td></td>
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<tr>
<td>Top Enrollers</td>
<td></td>
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<tr>
<td>Feature</td>
<td>Gold</td>
<td>Comp</td>
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<tr>
<td>New Directors</td>
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<tr>
<td>Downline Leaders</td>
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<td>Leaders with the Highest Percentage Volume Growth</td>
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<tr>
<td><strong>Marketing Reports</strong></td>
<td>Gold</td>
<td>Comp</td>
</tr>
<tr>
<td>Recent Buyers On/Not on Auto Order</td>
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<td></td>
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<tr>
<td>Associates and Preferred Customers Who Did Not Order</td>
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<tr>
<td><strong>Early Warning Reports</strong></td>
<td>Gold</td>
<td>Comp</td>
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<td>Auto Orders in Exception Status</td>
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<tr>
<td><strong>Bonus Opportunity Reports</strong></td>
<td>Gold</td>
<td>Comp</td>
</tr>
<tr>
<td>Associates Close to the Next Leadership Level</td>
<td></td>
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<td>Gold</td>
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<tr>
<td>How to Get to the Next Leadership level</td>
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<tr>
<td><strong>Charts and Maps</strong></td>
<td>Gold</td>
<td>Comp</td>
</tr>
<tr>
<td>A selection of Graphical Views</td>
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<tr>
<td>A selection of Geographical Distribution Views</td>
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</tr>
<tr>
<td><strong>E-mail and Mailing Labels</strong></td>
<td>Gold</td>
<td>Comp</td>
</tr>
<tr>
<td>Automatic e-mail and mailing label generation for your downline</td>
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</tbody>
</table>