



**SUCCESS TRACKER REPORTS**  
**will be available end May 2019**

# BUSINESS DEVELOPMENT BONUS RESEARCH

Go to the [Genealogy](#) > **Genealogy** report where we will find those people that you enrolled.

**MANNATECH** SUCCESS TRACKER

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# RESEARCH PART 1

In the *Genealogy* report step 1, put in the account you need to research.

The screenshot shows the 'Genealogy' report interface. At the top, there's a header 'Genealogy' and a link 'CLICK HERE for a Description of this Report and Business Tips for Using this Report'. Below this are two buttons: 'Show Report' (highlighted in green) and 'Show Standard Report'. The form is divided into steps. Step 1 is titled 'Step 1: (Optional) Change the Associate who is at the top level of the report'. It contains fields for 'Country' (set to 'United States'), 'Enter Account Number' (with a note: '(This associate will remain at the top level for all reports until you select another associate's account number)'), and a 'Lookup Associate Account Number' field. A large red arrow points to the 'Lookup Associate Account Number' field. Below Step 1 is Step 2: 'Customize the criteria (or rules) by which people will be selected.' This step includes various input fields: 'Name', 'City', 'State or Province', 'Spouse Name', 'Enrollor Name', 'Enrollor Account Number', 'How many levels deep?', 'Level 1 Lag Numbers (separate lag number by ";" eg. 1,2,3)', and 'Limit the number of results to: (leaving this blank will return all results)'. On the right side of Step 2, there are five 'Starts With' buttons and two radio buttons labeled 'Include' and 'Exclude'. At the bottom, Step 3 is partially visible: 'Step 3: Customize the order in which people will be listed.'

# RESEARCH PART 1 cont.

In the **Genealogy** report step 3, use dropdown and sort by Enroller Account Number.

**Step 3: Customize the order in which people will be listed.**

<b>Sort by :</b>	Genealogy Order	<input checked="" type="radio"/> Ascending
	Business Name	<input type="radio"/> Descending
<b>(Optional) Then by :</b>	Address 1	<input checked="" type="radio"/> Ascending
	Address 2	<input type="radio"/> Descending
<b>(Optional) Then by :</b>	City	<input checked="" type="radio"/> Ascending
	State or Province	<input type="radio"/> Descending
	Postal Code	<input checked="" type="radio"/> Ascending
	Sponsor Name	<input type="radio"/> Descending
	Enroller Name	<input checked="" type="radio"/> Ascending
	<b>Enroller Account Number</b>	<input type="radio"/> Descending
	Enroller Country	
	Physical Level	
	Day Phone	
	Night Phone	
	Term	
	Enrollment Date	
	Enrollment Level	
	Highest Enrollment Level	
	Leadership Level (as of last commission run)	
	Highest Leadership Level	
	Auto Order	

**Step 4: Customize the columns to be displayed**

**Step 5: Choose the data format if you want to print or download the report**

**PDF Font Size:**

**Step 6: Click one of the following buttons:**

[Show Report](#) [Save Report Specifications](#)

# RESEARCH PART 1 cont.

In the *Genealogy* report step 4, click on Selected Columns.

Step 4: Customize the columns to be displayed

Selected Columns

To remove a column from your report, deselect it by clicking in the box next to it to remove the check. To include a column, select it by clicking in the box to display a check. When finished choosing, click on the Continue to Next Step Button.

- ☐ Select/ Deselect All
- ☒ Account Number:
- ☒ Country
- ☒ Name
- ☐ Last Name:
- ☐ First Name:
- ☐ Business Name
- ☐ Account Number & Country
- ☐ Name & Location
- ☐ Name & Address
- ☐ Address 1
- ☐ Address 2
- ☐ City
- ☐ State or Province
- ☐ Postal Code
- ☐ Sponsor Name
- ☐ Sponsor Account Number
- ☐ Sponsor Country Code
- ☐ Enroller Name
- ☒ Enroller Account Number

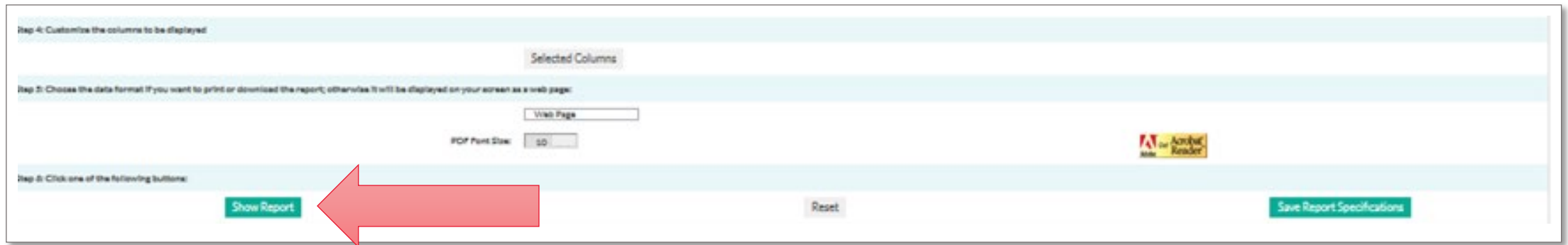
There, we choose:

- Account Number
- Name
- Enroller Account Number

And, continue to Next Step...

# SHOW GENEALOGY

You can leave step 5 and go to step 6. Click Show Report.




The screenshot shows a multi-step report generation interface. The steps are as follows:

- Step 4:** Customize the columns to be displayed. Below this is a button labeled "Selected Columns".
- Step 5:** Choose the data format if you want to print or download the report; otherwise it will be displayed on your screen as a web page. Below this is a dropdown menu currently set to "Web Page".
- PDF Print Size:** A dropdown menu currently set to "50".
- Step 6:** Click one of the following buttons: "Show Report", "Reset", and "Save Report Specifications".

A large red arrow points from the right towards the "Show Report" button, indicating the next action.

# COMPLETING RESEARCH

Click the account you Enrolled that you need to check.



Account Number	Name	Enroller Account Number
<a href="#">1540</a>		<a href="#">30</a>
<a href="#">751423</a>		<a href="#">30</a>
<a href="#">288038</a>		<a href="#">30</a>
<a href="#">1729</a>		<a href="#">30</a>
<a href="#">964795</a>		<a href="#">30</a>
<a href="#">3145455</a>		<a href="#">30</a>
<a href="#">3737671</a>		<a href="#">53</a>
<a href="#">608640</a>		<a href="#">53</a>
<a href="#">1422</a>		<a href="#">66</a>
<a href="#">418834</a>		<a href="#">66</a>
<a href="#">71</a>		<a href="#">66</a>
<a href="#">3014</a>		<a href="#">66</a>
<a href="#">406171</a>		<a href="#">66</a>
<a href="#">3737631</a>		<a href="#">66</a>
<a href="#">3737635</a>		<a href="#">66</a>

# COMPLETING RESEARCH

Click the account you Enrolled that you need to check and pull up Associate Detail.

- There you can check PPV for the current month.
- You can also click the **Org Profile** on that person to research each person's order in the PPV calculation.

**Associate Detail**

Detail For: CARRY, DANA  
Current Business Period: 2019-03

Name:  
Business Name:  
Account Number:  
Country:  
Address:  
Phone No. (Day):  
Phone No. (Eve):  
Phone No. (Fax):  
Email Address:  
Leadership Level (as of last commission run):  
Current Leadership Level:  
End of Business Period Leadership Level:  
Highest Leadership Level:  
Current Enrollment Level:  
Highest Enrollment Level:  
Original Enrollment Level:  
Original Enrollment Date:  
Renewal Due (BP):  
Sponsor:  
Enroller:  
First Upline Presidential's Name:  
First Upline Presidential's email address:  
AO Status:  
Next Automatic Order Date:  
Next Automatic Order PPV:  
Terminated:  
Success Tracker Subscription:  
PPV 2019-03:  
PPV 2019-02:  
PPV 2019-01:  
PPV 2018-12:  
PPV 2018-11:

**Downline Point Volume**

No. of Associates and Preferred Customers in the downline:  
2019-03:  
2019-02:  
2019-01:  
2018-12:  
2018-11:

Make Top Print Back Forward Close  
Org Profile





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