

MANNATECH INC.

PURGING IN 2022

Part II - with David Wood

EQUIP YOU

To equip and empower you to:

Part II

- **Engage your Leadership team.**
- **Prioritize your contact strategy.**

DOWNLINE LEADERS REPORT

Mannatech Success Tracker
Your High-Touch Business Builder

News Center Success Watcher **Reports** Graphs

United States
TOP GUN-REI

Logout
Success Tracker
Introduction
Customize my Success Tracker
Reports Overview
Associate Search
Associate Detail
Organizational Profile

[Personal Tracking](#)
[Downline Tracking](#)

Leadership Incentive
[Downline Associates Who Have Qualifying Status for RD and ND Incentive](#)
[Downline Associates Who Have Qualifying Volume for ED and PD Cash Incentive](#)

Genealogy
[Unilateral Diagram - Tree View](#)
[Unilateral Genealogy Diagram](#)

Renewal
[Associates Who Did Not Renew at All Star](#)
[Associates Who Renewed](#)
[Associates Due For Renewal](#)

Bonus Recognition
[Associates Who Received the Team Bonus](#)
[Associates Who Received Their First Team Bonus](#)
[Associates Who Received Their First Team Development Bonus](#)
[Associates Who Received the Team Development Bonus](#)
[Associates Who Received Their Personal Power Bonus](#)

Internal Use Only
[Compare Volumes - Any two BPs](#)
[Member Credits - Internal](#)

Downline Leaders

Click the **Downline Leaders** Report here.

CUSTOMIZING

Downline Leaders

? [CLICK HERE](#) for a Description of this Report and Business Tips for Using Report

Show Report Show Standard Report

Step 1: Optional) Change the Associate who is at the top level of the report

Country United States

Enter Account Number (This associate will remain at the top level for all reports until you select another associate's account number) XXXX

Step 2: Customize the criteria (or rules) by which people will be selected.

Country All

Business Period 2021-10

Current Leadership Level All

How many levels deep?

Level 1 Leg Numbers (separate leg number by "," eg. 1,2,3) Include Exclude

Step 3: Customize the columns to be displayed

Selected Columns

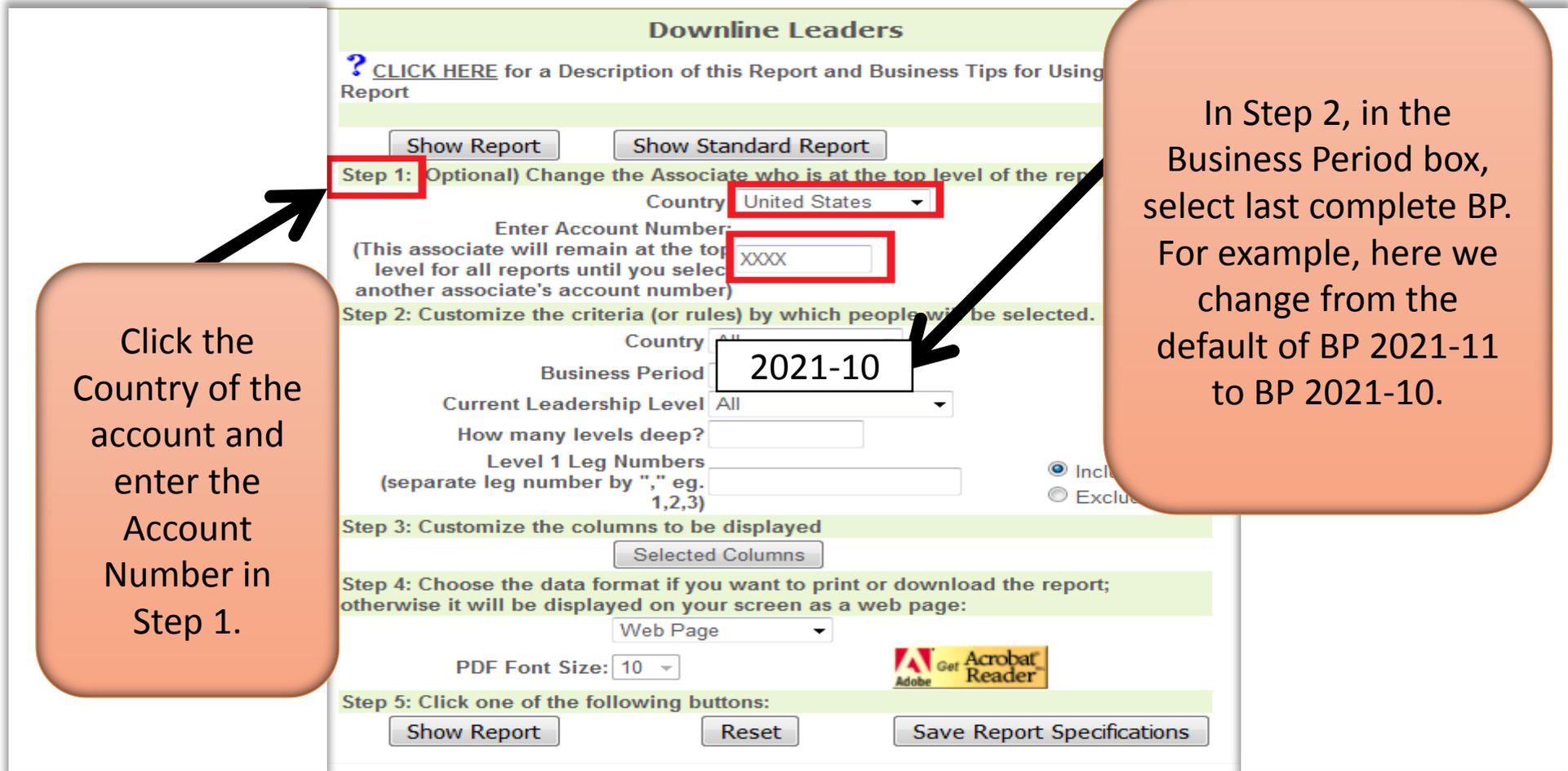
Step 4: Choose the data format if you want to print or download the report; otherwise it will be displayed on your screen as a web page:

Web Page

PDF Font Size: 10

Step 5: Click one of the following buttons:

Show Report Reset Save Report Specifications



The screenshot shows a web-based form for customizing a 'Downline Leaders' report. The form is divided into five steps. Step 1 involves selecting a country (United States) and entering an account number (XXXX). Step 2 involves selecting criteria, with the Business Period dropdown set to 2021-10. Step 3 is for column selection. Step 4 is for data format selection (Web Page). Step 5 contains buttons for 'Show Report', 'Reset', and 'Save Report Specifications'. Two callout boxes provide instructions: one points to the Country dropdown in Step 1, and the other points to the Business Period dropdown in Step 2.

Click the Country of the account and enter the Account Number in Step 1.

In Step 2, in the Business Period box, select last complete BP. For example, here we change from the default of BP 2021-11 to BP 2021-10.

DOWNLINE LEADERS REPORT

Account Number & Country	Name & Location	Business Name	Phone Numbers	Leg	Physical Level	Current Leadership Level	Highest Leadership Level	GPV	Show Next Level	Email
124 USA	WILD CHILD, INC.	WILD CHILD, INC.	☺ xxx-xxx-xxxx ☺ xxx-xxx-xxxx	1	1			0	Show Next Level	NoEmail@NoEmail.com
125 USA	LEOPARD SPOTS	LEOPARD SPOTS CO.	☺ xxx-xxx-xxxx	2	1			0	Show Next Level	NoEmail@NoEmail.com
126 USA	WOW INC	WOW INC	☺ xxx-xxx-xxxx ☺ xxx-xxx-xxxx	3	1			0	Show Next Level	NoEmail@NoEmail.com
127 USA	WOW FAMILY FOUNDATION	WOW FAMILY FOUNDATION	☺ xxx-xxx-xxxx ☺ xxx-xxx-xxxx	4	1		Regional	8115	Show Next Level	NoEmail@NoEmail.com
128 USA	GERALD MOREWOW	GERALD MOREWOW	☺ xxx-xxx-xxxx ☺ xxx-xxx-xxxx		4	Regional	Presidential	3104	Show Next Level	NoEmail@NoEmail.com
129 USA	SKIN WOW INC	SKIN WOW INC	☺ xxx-xxx-xxxx ☺ xxx-xxx-xxxx		23	Regional	National	2079	Show Next Level	NoEmail@NoEmail.com
130 USA	WOW BOY	WOW BOY	☺ xxx-xxx-xxxx ☺ xxx-xxx-xxxx	5	1		Presidential	5348	Show Next Level	NoEmail@NoEmail.com
131 USA	WOW GIRL	WOW GIRL	☺ xxx-xxx-xxxx ☺ xxx-xxx-xxxx		13	Regional	Presidential	2657	Show Next Level	NoEmail@NoEmail.com
132 USA	BEAUTY AND THE BEAST	BEAUTY AND THE BEAST	☺ xxx-xxx-xxxx ☺ xxx-xxx-xxxx		14	Regional	National	1817	Show Next Level	NoEmail@NoEmail.com

NEXT LEVEL REPORT

How to Get to the Next Leadership Level

(Optional) Change the Associate who is at the top level of the report:

Lookup Associate Country:

Enter Account Number:

[Success Tracker Video Training](#)

For Associate

Country: United States

November 2, 2015 6:34:54 PM (CST)

Information provided is as of 11:29 AM (CST) on Nov 2, 2015

The following parameters were used:

Current Status equals Presidential /All Star

Comparison Status equals Presidential /All Star

Business Period equals 2015-12

In this report, Leadership Level is calculated based on the total of GPV in the current BP and Pending AOs. This should be used for information purposes only. Your actual Leadership Level will not be calculated until the next commission run and will only consider those orders that have generated.

To achieve any leadership level, the account must be renewed.

[? CLICK HERE](#) for a Description of this Report and Business Tips for Using this Report

AO Pending in Current Business Period

	Your Current Status			Qualifications to get to	What You Must Do
	Presidential			Presidential	
Enrollment Level	All Star			All Star	OK
Renewed	Yes			Must be Renewed	OK
	Current Amount	Pending AO Amount	Current + Pending AO		
PV/QV	0	112	112	Minimum of 100	OK
GPV	17432	30013	47445	Minimum of 60000	Additional 12555 GPV
	8115 in Leg 4 5348 in Leg 5 3969 in Leg 26	12392 in Leg 4 9589 in Leg 5 8032 in Leg 26	20507 in Leg 4 14937 in Leg 5 12001 in Leg 26		

PRIORITIES

Step 1: Identify Terminated Accounts

Sort the list by terminated accounts and delete those that have terminated since you will not be contacting terminated Associates.

SORTING STRATEGY STEPS 1-2

The screenshot shows the Microsoft Excel interface with a data table. The ribbon is set to the 'Sort & Filter' group. Two callout boxes provide instructions:

- 1.** Move your cursor on top of the "Term" column and click to select and then go to step 2.
- 2.)** Sort "Term" by clicking on "ZA"

	A	B	C	D	E	F	G	H	I	J	K
1	Name	Account Num	Name & Location	Enroller Name	Physic Phone Num	Term	Enrollmen	Current Le	Auto Orde	PPV Cur	
2	Associate	727 USA	Associate, Coppell, TX	Associate	0		All Star	Presidenti	Y		1
3	Associate	720 USA	Associate, Coppell, TX	Associate	1 999-999-99		Customer		N		
4	Associate	17246 USA	Associate, Coppell, TX	Associate	2 82 595 73		Customer		N		
5	Associate								N		
6	Associate								N		
7	Associate								N		
8	Associate								N		
9	Associate								N		
10	Associate								N		
11	Associate								N		
12	Associate								N		
13	Associate								N		
14	Associate								N		
15	Associate								N		
16	Associate								N		
17	Associate								N		
18	Associate								N		
19	Associate								N		
20	Associate								N		
21	Associate								N		
22	Associate								N		

REMOVE TERMINATED

Select the terminated accounts by right-clicking on the numbers on the left hand side and delete from the list

Account Num	Name & Location	Enroller Name	Physic	Phone Num	Term	Enrollmen	Current Le
1	17246 USA					Customer	
2	17247					Customer	
3	17248					Customer	
4	17249					Customer	
5	17250					Customer	
6	44451					Master	
7	44452					Master	
8	44453					Master	
9	44454					Master	
10	5460					Customer	
11	2642					Customer	
12	4449					Customer	
13	5673					Master	
14	6073					Customer	
15	9863					Customer	
16	2097					Customer	
17	9899					Customer	N
18	1073					Customer	N
19	6487					Customer	N
20	10865					Customer	N
21	26446 USA					Customer	N
22	7278 USA					Customer	N

FIND THOSE THAT WILL NOT BE PURGED

Step 2: Identify Currently Active Associates

Sort the list by “Last Order BP” and delete those who have ordered products in the last two years. If they had an order in 2020 or 2021, **we do not need them on this list.**

ORDER BY MOST RECENT ORDER DATE

The screenshot shows the Microsoft Excel interface with the 'Data' tab selected. The 'Sort' button in the ribbon is highlighted with a blue arrow. The spreadsheet data is as follows:

	G	H	I	J	K	L	M	N	O	P	Q	R
1	Enrollmen	Current Le	Auto Orde	PPV Curre	PPV 1 Peri	PPV 2 Peri	PPV 3 Peri	PPV 4 Peri	Career Purch	Last Order	Next Auto	Next Auto Em
2	Customer		N	0	0	0	0	0	3005	2010-07		
3	Customer		N	0	0	0	0	0	3011	2009-01		
4	Customer		N	0	0	0	0	0	3021	2007-12		
5	Customer		N									
6	Customer		N									
7	Customer											
8	All Star											
9	Customer											
10	Customer											
11	Customer											
12	Customer											
13	Customer											
14	Customer											
15	Customer											
16	Customer											
17	Customer											
18	Master											
19	Customer											
20	Customer		N									
21	Customer		N									
22	Customer		N	0	0	0	0	0	3202	2001-10		

2.) Sort "Last Order BP" by clicking on "ZA"

1. Move your cursor on top of the "Last Order BP" column and click to select and then go to step 2.

DELETE ACCOUNTS WITH ORDERS IN LAST 2 YEARS

The screenshot shows a Microsoft Excel spreadsheet with a list of accounts. The columns are labeled: Account Num, Name & Location, Enroller Name, Physical Phone Number, Term, Enrollment, and Current Level. The data rows show account numbers and names, such as '17246 USA' and '17247'. A context menu is open over the list, with the 'Delete' option highlighted. An orange callout box with a white border contains the text: 'Select the 2020 and 2021 accounts with an order by right-clicking on the numbers on the left hand side and delete from the list'. Two black arrows point from the callout box: one to the row numbers (2, 3, 4, 6, 7, 8, 9) and another to the 'Delete' option in the context menu.

Account Num	Name & Location	Enroller Name	Physical Phone Number	Term	Enrollment	Current Level
17246	USA					Customer
17247						Customer
17248						Customer
17249						Customer
17250						Customer
44451						Master
44452						Master
44453						Master
54604						Customer
26425						Customer
4449						Customer
5673						Master
6073						Customer
9863						Customer
2097						Customer
9899						Customer
1073						Customer
6487						Customer
10865						Customer
26446						Customer
7278	USA					Customer

Select the 2020 and 2021 accounts with an order by right-clicking on the numbers on the left hand side and delete from the list

FOCUS ON LIFETIME PURCHASES

Step 3: Identify the highest Commitment Candidates

Sort by “Career Purchases”

LARGEST VOLUME AT THE TOP OF THE LIST

The screenshot shows an Excel spreadsheet with the following data:

	N	O	P	Q	R	S	T
1	PPV 1 Peri	PPV 2 Peri	PPV 3 Peri	PPV 4 Peri	Career Purchases	Last Or Renew	
2	0	0	0	0	57	1995-0	1996-0
3	0	0	0	0	55	1995-0	1995-0
4	0	0	0	0	57	1995-0	1995-0
5	0	0	0	0	361	1995-0	1995-0
6	0	0	0	0	226	1996-0	1995-0
7	0	0	0	0	90	1999-0	1999-0
8	0	0	0	0	90	1999-0	1999-0
9	0	0	0	0	90	1999-0	1999-0
10	0	0	0	0	90	1999-0	1999-0
11	0	0	0	0	90	1999-0	1999-0
12	0	0	0	0	90	1999-0	1999-0
13	0	0	0	0	90	1999-0	1999-0
14	0	0	0	0	90	1999-0	1999-0
15	0	0	0	0	90	1999-0	1999-0
16	0	0	0	0	90	1999-0	1999-07
17	0	0	0	0	90	1999-0	1999-07
18	0	0	0	0	90	1999-0	1999-07
19	0	0	0	0	90	1999-0	1999-07
20	0	0	0	0	90	1999-0	1999-07
21	0	0	0	0	201	1997-0	1996-08
22	0	0	0	0	90	1999-0	1999-07

Two callout boxes provide instructions:

- 1.) Sort by moving your cursor on top of the "Career Purchases" column and click to select and then go to step 2.
- 2.) Sort "Career Purchases" by clicking on "AZ"

SMALL-TIME PURCHASERS ARE NOT PRIORITY

Select those with “Career Purchases” less than \$1,000 by right-clicking on the numbers on the left hand side and delete from the list

Account Number	Customer Type	Enrollment	Current Le
17246 USA	Customer		
17247	Customer		
17248	Customer		
17249	Customer		
17250	Customer		
4345	Master		
4345	Master		
4345	Master		
5460	Customer		
2642	Customer		
4449	Customer		
5673	Master		
6073	Customer		
9863	Customer		
2097	Customer		
9899	Customer	N	0 0
1073	Customer	N	0 0
6487	Customer	N	0 0
10865	Customer	N	0 0
26446 U	Customer	N	0 0
7278 USA	Customer	N	0 0

WHEN WAS THEIR LAST ORDER?

Step 4: Prioritize by most current purchasers

Sort by “Last Order BP”.

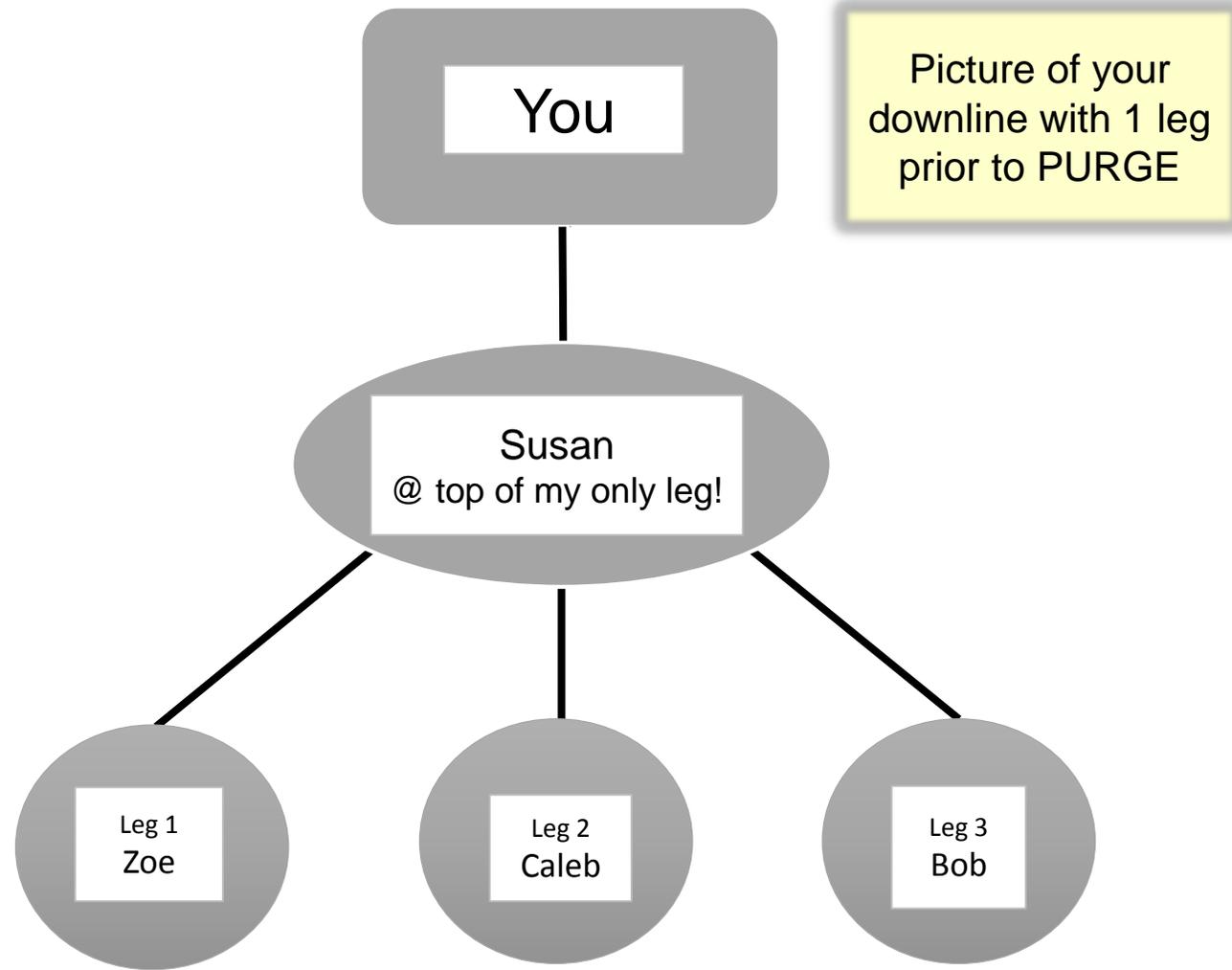
SORT THE LIST FOR HIGHEST TARGETS FIRST

The screenshot shows the Microsoft Excel interface with the 'Data' tab selected in the ribbon. The 'Sort & Filter' group is active, and the 'Sort' button is highlighted with a black arrow. The spreadsheet contains a table with columns: G (Enrollmen), H (Current Le), I (Auto Orde), J (PPV Curre), K (PPV 1 Peri), L (PPV 2 Peri), M (PPV 3 Peri), N (PPV 4 Peri), O (Career Purch), P (Last Order), Q (Next Auto), R (Next Auto), and S (Em). The 'Last Order BP' column (P) is highlighted in blue. Two orange callout boxes provide instructions:

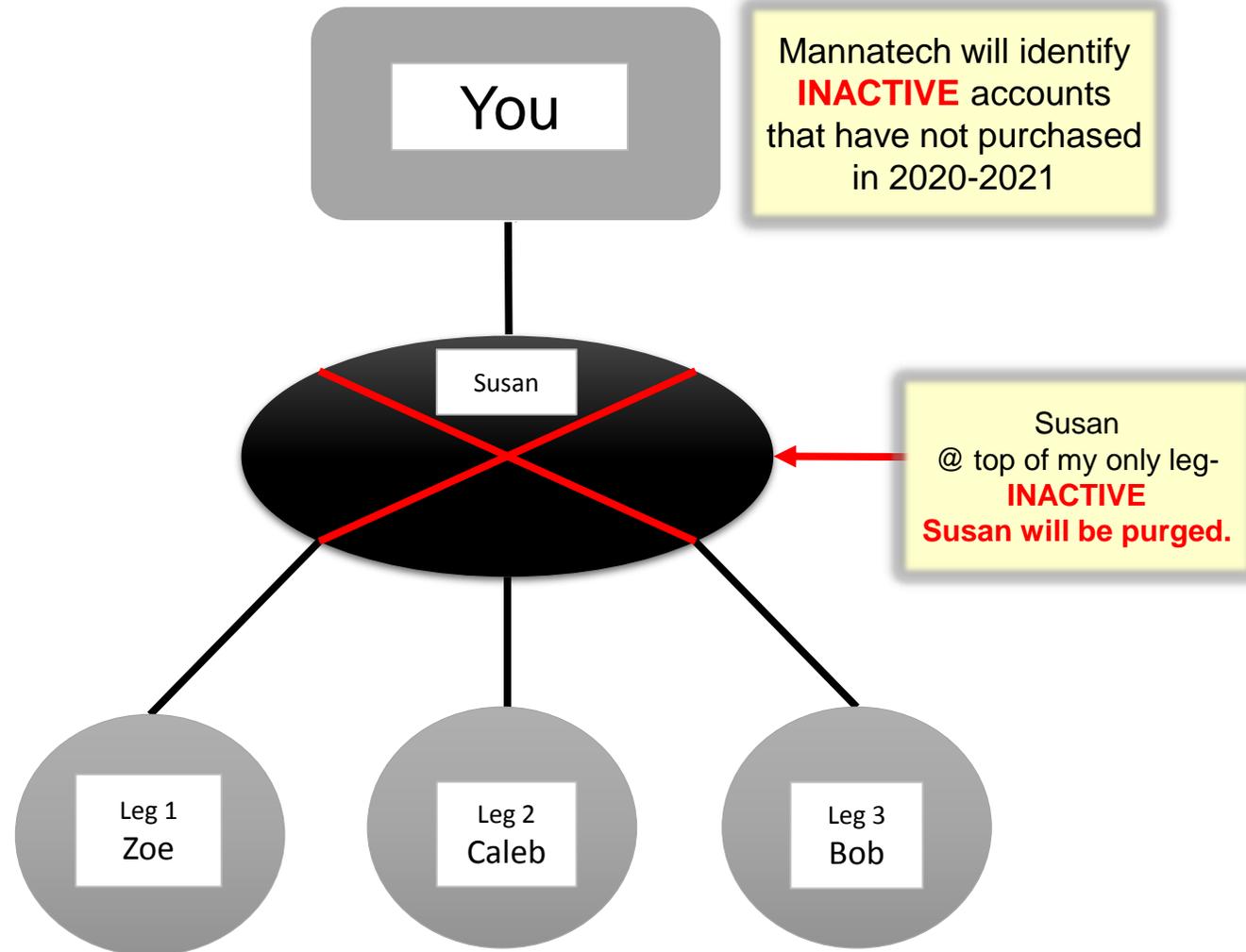
2.) Sort "Last Order BP" column by clicking on "ZA"

1.) Move your cursor on top of the "Last Order BP" column and click to select then go to step 2.

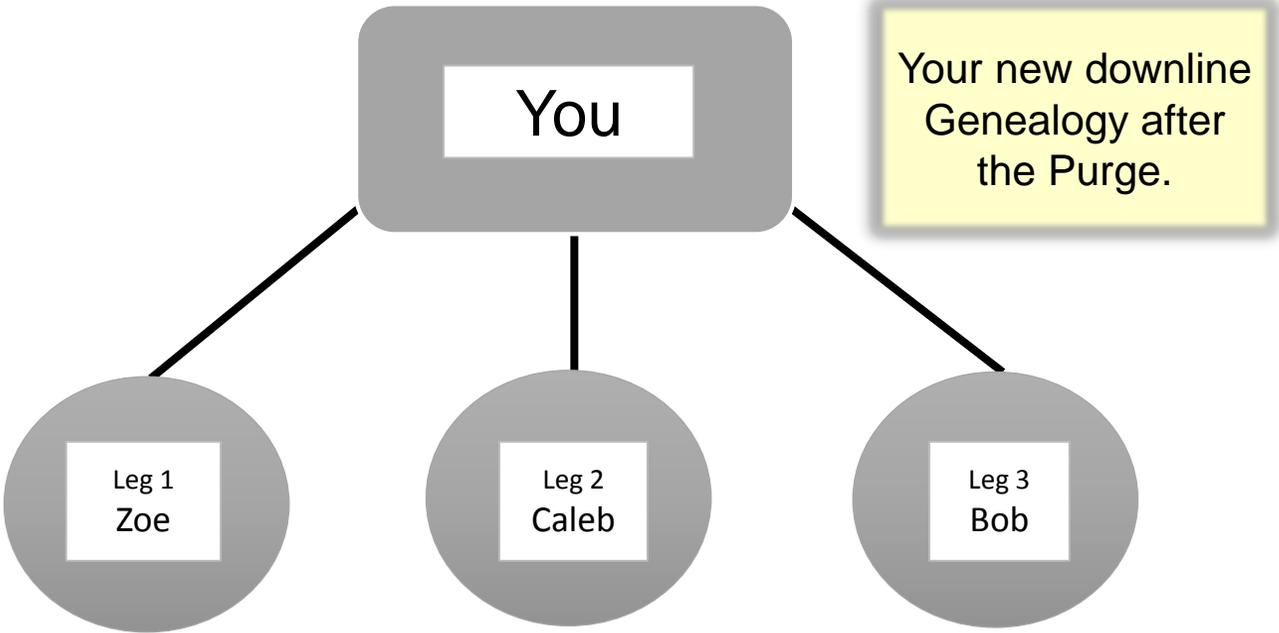
DOWNLINE WITH INACTIVE



IDENTIFY INACTIVE



NO INACTIVE ACCOUNTS



YOU ARE A GREAT LEADER!

