



**MANNATECH®**



**MANNATECH®**

# **MANNATECH 2019 RECORDS REFRESH**

Bob Adam & David Wood

May, 2019

# FACTS ABOUT MANNATECH PURGES

	<b><u>Purge 1</u></b>	<b><u>Purge 2</u></b>
Date	13-Feb-16	<b>26-May-19</b>
Cut Off	31-Dec-13	<b>30-Jun-17</b>
Inactivity Time	28 BPs (2 yr +)	<b>23 months</b>
Future?	Likely annual (Dec), with 1 yr or 2 yr inactivity time (TBD)	



# WHAT ACCOUNTS WILL BE PURGED?

- “Inactive” accounts since July 1, 2017 (last order June 30, 2017 or earlier).
- “Inactive” = no paid order – products, tools or renewals.
- Product purchases will be measured by PPV (not by PV).
- Renewed Associate accounts will not be purged, even with zero PPV.
- Non-renewed Associate accounts will not be purged if they have PPV in July 2017 or later.



# BENEFITS/REASONS FOR THE PURGE

- **Security protection** – both for Mannatech and for Associates/Customers.
- Allows your records to be **congruent** with the Compensation Plan.
- Your records are more **streamlined**, less cluttered, and easier to work with.
- Provides potential **structural benefits** for ongoing business and/or Incentive purposes.



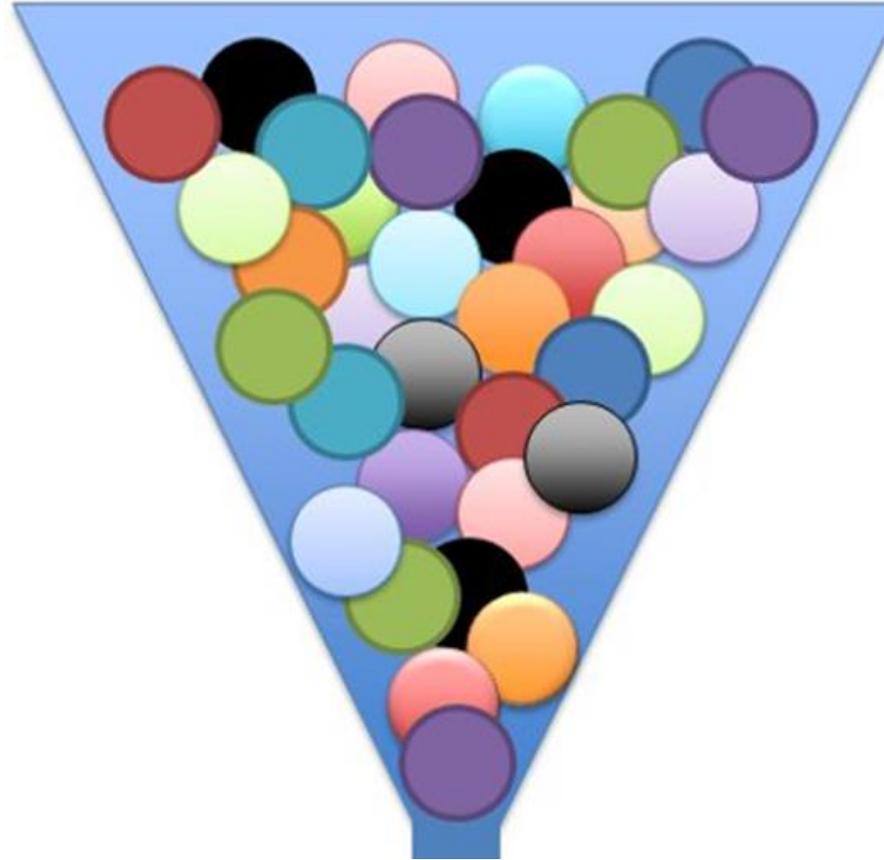
# PREPARATION AND TRAINING

- WATCH ... for communications, training webinars, and instruction sheets.
- EXAMINE ... your organizational structure and how it could be impacted.
- INFORM ... your team members so they can be prepared.



# THE NEED FOR SORTING

Your  
Associate  
Collection



# OBJECTIVE

To use the power of **Success Tracker** data combined with the sorting capacity of **Excel** to produce a personalized and prioritized strategy for **RECORDS REFRESH 2019**.



# CAPTURE THE DATA



## SUCCESS TRACKER

Home Success Watcher Reports Graphs

United States

- Logout
- Success Tracker Introduction
- Customize my Success Tracker
- Reports Overview
- Associate Search
- Associate Detail
- Organizational Profile
- Incentive
- Genealogy**
- Genealogy
- Unilateral Diagram - Tree View
- Unilateral Genealogy Diagram
- Renewal
- Recognition
- Marketing
- Early Warning
- Bonus Opportunity
- Bonus Qualification

### Genealogy

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

[Lookup Associate Account Number](#)

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

Name	<input type="text"/>	Starts With <input type="text"/>
City	<input type="text"/>	Starts With <input type="text"/>
State or Province	<input type="text"/>	Starts With <input type="text"/>
Sponsor Name	<input type="text"/>	Starts With <input type="text"/>
Enroller Name	<input type="text"/>	Starts With <input type="text"/>

First, click on "Genealogy" to open these reports.

Next, select the "Genealogy" report

# CAPTURE THE DATA

- Logout
- Success Tracker Introduction
- Customize my Success Tracker
- Reports Overview
- Associate Search
- Associate Detail
- Organizational Profile
- + 2016 North America "Cabo Challenge" Incentive
- + Leadership Incentive
- Genealogy
  - Genealogy →
  - Unilateral Diagram - Tree View
  - Unilateral Genealogy Diagram
  - + Renewal
  - + Recognition
  - + Marketing
  - + Early Warning
  - + Bonus Opportunity
  - + Bonus Qualification
  - + Bonus Recognition
  - + Accufax/Starbuilder
  - + Internal Use Only
  - Saved Report Specifications
  - All Qualified Presidentials

### Genealogy

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

[Show Report](#) [Show Standard Report](#)

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

Country:

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

[Lookup Associate Account Number](#)

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

Name

City

State or Province

Sponsor Name

Enroller Name

Enroller Account Number

How many levels deep?

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

Limit the number of results to:  
(leaving this blank will return all results)

Include  
 Exclude

**In Step 1, identify Country, plus your account, or the Leader you want to work with or Associate at top of leg you want to analyze.**

**Skip Step 2 & 3, Scroll down to Step 4**

# CAPTURE THE DATA

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

Sort by:   Ascending

(Optional) Then by:   Descending

(Optional) Then by:

Step 4: Customize the columns to be displayed

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:

PDF Font Size:



Step 6: Click one of the following buttons:

**Step 4 -  
Click on “Selected  
Columns” to select the  
columns you will like  
the report to show.**

# CAPTURE THE DATA

Logout
Success Tracker Introduction
Customize my Success Tracker
Reports Overview
Associate Search
Associate Detail
Organizational Profile
+ 2016 North America "Cabo Challenge" Incentive
+ Leadership Incentive
- Genealogy
Genealogy <span>→</span>
Unilateral Diagram - Tree View
Unilateral Genealogy Diagram
+ Renewal
+ Recognition
+ Marketing
+ Early Warning
+ Bonus Opportunity
+ Bonus Qualification
+ Bonus Recognition
+ Accufax/Starbuilder
+ Internal Use Only
Saved Report Specifications
All Qualified Presidentials
Contact From Qualified Presidentials
Contact My Downline

- 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
- Enroller Country
- Physical Level
- Phone Numbers
- Day Phone
- Night Phone
- Terminated
- Enrollment Date
- Original Enrollment Level
- Enrollment Level
- Highest Enrollment Level
- Leadership Level
- Highest Leadership Level
- Auto Order
- PPV Current Period
- Upline GPV Current Period
- PPV 1 Period Ago
- Upline GPV 1 Period Ago
- PPV 2 Periods Ago
- PPV 3 Periods Ago
- PPV 4 Periods Ago

Selections:
Account Number
Country
Last Name
First Name
Business Name
Sponsor Name
Enroller Name
Physical Level
Phone Numbers
<b>Terminated</b>
Enrollment Level
Leadership Level
Highest Leadership Level
Auto Order
PPV Current Period
PPV 1 Period Ago
PPV 2 Periods Ago
PPV 3 Periods Ago
PPV 4 Periods Ago
<b>Career Purchases (Cumulative QV)</b>
<b>Last Order Period</b>
Next Automatic Order Date
Email
<b>Order(s) in prior 6 BP's</b>

# CAPTURE THE DATA

- + Recognition
- + Marketing
- + Early Warning
- + Bonus Opportunity
- + Bonus Qualification
- + Bonus Recognition
- + Accufax/Starbuilder
- + Internal Use Only
- Saved Report Specifications
- All Qualified Presidentials
- Contact From Qualified Presidentials
- Contact My Downline
- Comp Plan
- + Help Menu

- Phone Numbers
- Day Phone
- Night Phone
- Terminated
- Enrollment Date
- Original Enrollment Level
- Enrollment Level
- Highest Enrollment Level
- Leadership Level
- Highest Leadership Level
- Auto Order
- PPV Current Period
- Upline GPV Current Period
- PPV 1 Period Ago
- Upline GPV 1 Period Ago
- PPV 2 Periods Ago
- PPV 3 Periods Ago
- PPV 4 Periods Ago
- Career Purchases (Cumulative QV)
- Last Order Period
- PPV Since Last Renewal
- Renewal BP
- Next Automatic Order Date
- Next Automatic Order PPV
- Next PCP/NFR
- Automatic Order Date
- Next PCP/NFR
- Automatic Order PPV
- Team Bonus
- Received Last BP
- Order Number
- Signup Pack Name
- Renewal Pack Name
- Leg
- Email:
- Order(s) in prior 6 BP's
- Opted In To Loyalty Program

Choose one of the buttons below:

Reset

Continue to Next Step

**After checking your selections, Click “Continue to Next Step”, it takes you back to Genealogy Report.**

# CAPTURE THE DATA

+ Bonus Recognition

+ Accufax/Starbuilder

+ Internal Use Only

Saved Report Specifications

All Qualified Presidentials

Contact From Qualified Presidentials

Contact My Downline

Comp Plan

+ Help Menu

How many levels deep?

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

Include  
 Exclude

Limit the number of results to:  
(leaving this blank will return all results)

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

Sort by:

(Optional) Then by:

(Optional) Then by:

**Step 5- Change the data format from Web Page to Tab Delimited. Then, Click "Show Report" in Step 6.**

Descending

Step 4: Customize the columns to be displayed

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:

PDF Font Size:

Web Page  
Acrobat (PDF) File  
Tab Delimited



Step 6: Click one of the following buttons:

Show Report

Reset

Save Report Specifications

# MOVE THE DATA

File	Edit	Format	View	Help	Enrollment Level	Current Leadersh
727	Undo	Ctrl+Z	ssociate	N	All Star	Presidential Platinum
720			ssociate	N	Customer	0 0
172	Cut	Ctrl+X	ssociate	Y	Customer	0 0
172	Copy	Ctrl+C	ssociate	Y	Customer	0 0
172	Paste	Ctrl+V	ssociate		Customer	0 0
299	Delete	Del	ssociate		Customer	0 0
299			ssociate		Customer	0 0
299	Find...	Ctrl+F	ssociate		Customer	0 0
348	Find Next	F3	ssociate		Master	0 0
171	Replace...	Ctrl+H	ssociate		Master	0 0
171	Go To...	Ctrl+G	ssociate		Master	0 0
171	Select All	Ctrl+A	ssociate	N	Master	0 0
171	Time/Date	F5	ssociate	Y	Master	0 0
484				Y	Master	0 0
484				Y	Master	0 0
484561	Associate		Associate		Master	0 0
484566	Associate		Associate		Master	0 0
484567	Associate		Associate		Master	0 0
724	Associate		Associate		Master	0 0
1337	Associate		Associate		Master	0 0
2213	Associate		Associate		Master	0 0
17149	Associate		Associate		Master	0 0
17150	Associate		Associate		Master	0 0
17151	Associate		Associate		Master	0 0
17154	Associate		Associate		Master	0 0
484526	Associate		Associate		Master	0 0
484530	Associate		Associate		Master	0 0
484534	Associate		Associate		Master	0 0
484536	Associate		Associate		Master	0 0
484539	Associate		Associate		Master	0 0
3030537	Associate		Associate	Y	Customer	0 0
725	Associate		Associate	N	Customer	0 0
1231	Associate		Associate	Y	Customer	0 0
1232	Associate		Associate	Y	Master	0 0
986	Associate		Associate		Master	0 0
484511	Associate		Associate		Master	0 0
484515	Associate		Associate		Master	0 0

# MOVE THE DATA

Account Number	Name	Enroller Name	Phone Numbers	Term	Enrollment Level	Current Leadersh	
727	Associate	Associate		N	All Star		
720	Associate	Associate	999-999-9999	N	Customer		
17246	Associate	Associate	817-595-3694	Y	Customer		
17247	Associate	Associate	817-595-3694	Y	Customer		
17248	Assocaite	Associate	817-595-3694	Y	Customer		
17249	Associate	Associate	817-595-3694	Y	Customer		
17250	Associate	Associate	817-595-3694	Y	Customer		
29939	Associate	Associate	214-601-2692	N	Customer		
29943	Associate	Associate	214-601-2692	N	Customer		
29944	Associate	Associate	214-723-1717	N	Customer		
34876	Associate	Associate	214-723-8945	N	Customer		
722	Associate	Associate	999-999-9999	N	Master		
17155	Associate	Associate	817-595-3694	N	Master	0 0 0	
17153	Associate	Associate	817-595-3694	N	Master	0 0 0	
17156	Associate	Associate	817-595-3694	N	Master	0 0 0	
17158	Associate	Associate	817-595-3694	N	Master	0 0 0	
17163	Associate	Associate	817-595-3694	N	Master	0 0 0	
17164	Associate	Associate	817-595-3694	N	Master	0 0 0	
484557	Associate	972-355-5281	972-355-5281	Y	Master	0 0 0	
484560	Associate	972-355-5281	972-355-5281	Y	Master	0 0 0	
484561	Associate	972-355-5281	972-355-5281	Y	Master	0 0 0	
484566	Associate	972-355-5281	972-355-5281	Y	Master	0 0 0	
484567	Associate	972-355-5281	972-355-5281	Y	Master	0 0 0	
724	Associate	Associate	999-999-9999	N	Master	0 0 0	
1337	Associate	Associate	214-233-6221	N	Master	0 0 0	
2213	Associate	Associate	615-794-8572	N	Master	0 0 0	
17149	Associate	Associate	817-595-3694	N	Master	0 0 0	
17150	Associate	Associate	817-595-3694	N	Master	0 0 0	
17151	Associate	Associate	817-595-3694	N	Master	0 0 0	
17154	Associate	Associate	817-595-3694	N	Master	0 0 0	
484526	Associate	972-355-5281	972-355-5281	Y	Master	0 0 0	
484530	Associate	972-355-5281	972-355-5281	Y	Master	0 0 0	
484534	Associate	972-355-5281	972-355-5281	Y	Master	0 0 0	
484536	Associate	972-355-5281	972-355-5281	Y	Master	0 0 0	
484539	Associate	972-355-5281	972-355-5281	Y	Master	0 0 0	
3030537	Associate	Associate	214-896-3256	Y	Customer	0 0 0	
725	Associate	Associate	903-595-0354	N	Customer	0 0 0	
1231	Associate	Associate	999-999-9999	Y	Customer	0 0 0	
1232	Associate	Associate	999-999-9999	Y	Master	0 0 0	
986	Associate	Associate	817-649-1321	214-641-8829	N	Master	0 0 0
484511	Associate	Associate	972-355-5281	972-355-5281	Y	Master	0 0 0
484515	Associate	Associate	972-355-5281	972-355-5281	Y	Master	0 0 0

The report will list the columns you selected and will look like this

# MOVE THE DATA

Account Number	Name	Enroller Name	Phone Numbers	Term	Enrollment Level	Current Leaders	Presidential	Platinum
727	Associate	Associate		N	All Star			
720	Associate	Associate		N	Customer		0	0
17246	Associate	Associate		Y	Customer		0	0
17247	Associate	Associate		Y	Customer		0	0
17248	Assocaiite	Associate		Y	Customer		0	0
17249	Associate	Associate						
17250	Associate	Associate						
29939	Associate	Associate						
29943	Associate	Associate						
29944	Associate	Associate						
34876	Associate	Associate						
722	Associate	Associate						
17155	Associate	Associate						
17153	Associate	Associate						
17156	Associate	Associate						
17158	Associate	Associate						
17163	Associate	Associate						
17164	Associate	Associate						
484557	Associate	Associate		Y	Master		0	0
484560	Associate	Associate		Y	Master		0	0
484561	Associate	Associate		Y	Master		0	0
484566	Associate	Associate		Y	Master		0	0
484567	Associate	Associate		Y	Master		0	0
724	Associate	Associate		N	Master		0	0
1337	Associate	Associate		N	Master		0	0
2213	Associate	Associate		N	Master		0	0
17149	Associate	Associate		N	Master		0	0
17150	Associate	Associate		N	Master		0	0
17151	Associate	Associate		N	Master		0	0
17154	Associate	Associate		N	Master		0	0
484526	Associate	Associate		Y	Master		0	0
484530	Associate	Associate		Y	Master		0	0
484534	Associate	Associate		Y	Master		0	0
484536	Associate	Associate		Y	Master		0	0
484539	Associate	Associate		Y	Master		0	0
3030537	Associate	Associate		Y	Customer		0	0
725	Associate	Associate		N	Customer		0	0
1231	Associate	Associate		Y	Customer		0	0
1232	Associate	Associate		Y	Master		0	0
986	Associate	Associate				N	Master	0
484511	Associate	Associate				Y	Master	0
484515	Associate	Associate				Y	Master	0



After selecting all, you will "Copy" the entire list and paste on an EXCEL Sheet

# MOVE THE DATA

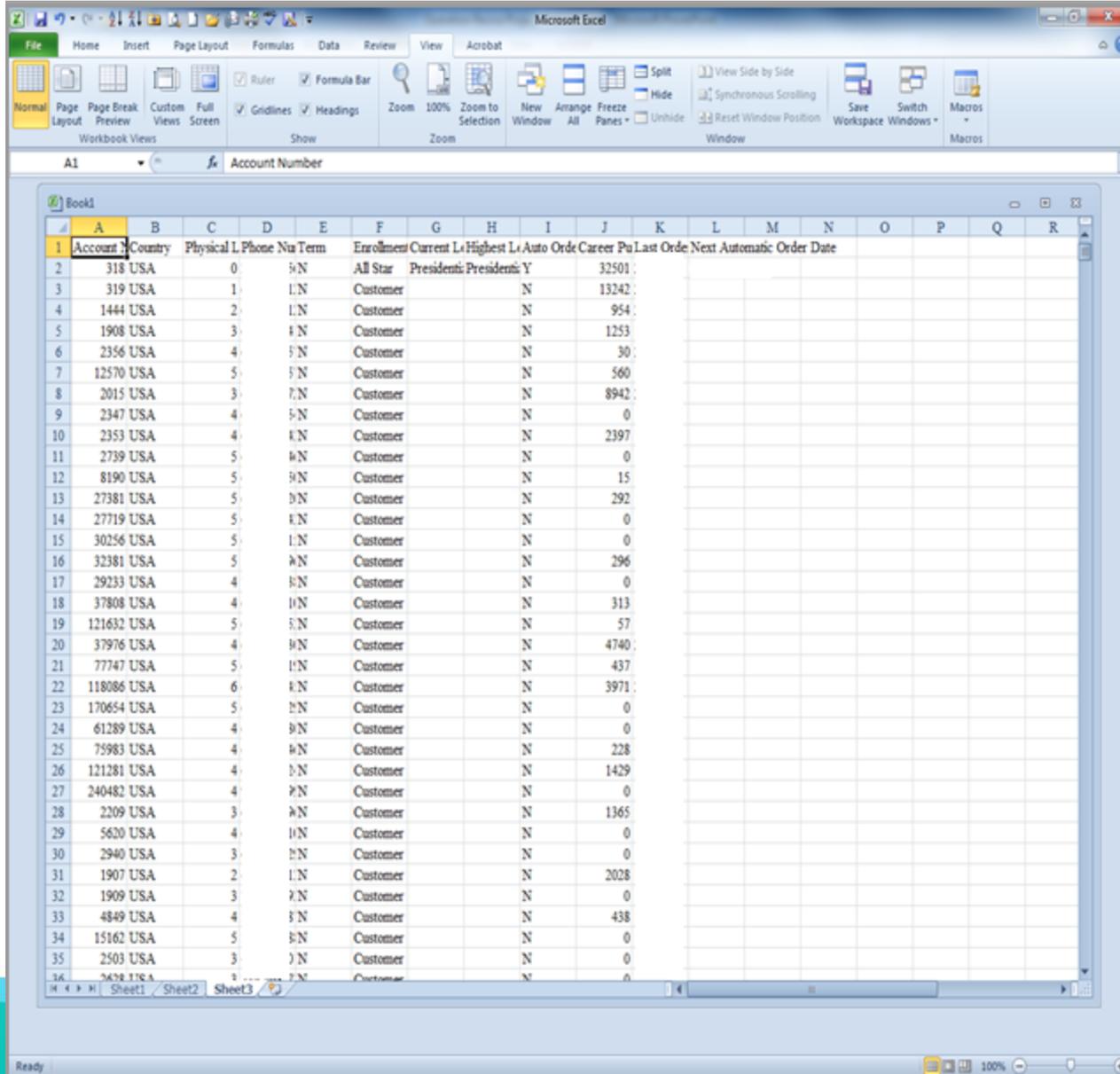
The image shows a screenshot of the Microsoft Excel application window. The title bar reads "Book1 - Microsoft Excel". The ribbon is set to "Home", and the "Clipboard" group is active, showing "Paste" and "Format Painter" options. The spreadsheet grid is visible, with column headers A through S and row numbers 1 through 39. A blue callout box with the text "1. Move your cursor to the top left corner" has an arrow pointing to cell A1. Another blue callout box with the text "2. Click on Paste" has an arrow pointing to the "Paste" button in the ribbon. A third blue callout box with the text "EXCEL" is positioned in the center of the spreadsheet grid. The status bar at the bottom shows "Ready", "Sheet1", "Sheet2", "Sheet3", and "100%" zoom.

2. Click on Paste

1. Move your cursor to the top left corner

EXCEL

# MOVE THE DATA



The screenshot shows a Microsoft Excel spreadsheet with the following data:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	
1	Account	Country	Physical	Phone	Na	Term	Enrollment	Current L	Highest L	Auto	Orde	Career	Pa	Last	Orde	Next	Automatic	Order	Date
2	318	USA	0		N	All Star	President	President	Y					32501					
3	319	USA	1		N	Customer				N				13242					
4	1444	USA	2		N	Customer				N				954					
5	1908	USA	3		N	Customer				N				1253					
6	2356	USA	4		N	Customer				N				30					
7	12570	USA	5		N	Customer				N				560					
8	2015	USA	3		N	Customer				N				8942					
9	2347	USA	4		N	Customer				N				0					
10	2353	USA	4		N	Customer				N				2397					
11	2739	USA	5		N	Customer				N				0					
12	8190	USA	5		N	Customer				N				15					
13	27381	USA	5		N	Customer				N				292					
14	27719	USA	5		N	Customer				N				0					
15	30256	USA	5		N	Customer				N				0					
16	32381	USA	5		N	Customer				N				296					
17	29233	USA	4		N	Customer				N				0					
18	37808	USA	4		N	Customer				N				313					
19	121632	USA	5		N	Customer				N				57					
20	37976	USA	4		N	Customer				N				4740					
21	77747	USA	5		N	Customer				N				437					
22	118086	USA	6		N	Customer				N				3971					
23	170654	USA	5		N	Customer				N				0					
24	61289	USA	4		N	Customer				N				0					
25	75983	USA	4		N	Customer				N				228					
26	121281	USA	4		N	Customer				N				1429					
27	240482	USA	4		N	Customer				N				0					
28	2209	USA	3		N	Customer				N				1365					
29	5620	USA	4		N	Customer				N				0					
30	2940	USA	3		N	Customer				N				0					
31	1907	USA	2		N	Customer				N				2028					
32	1909	USA	3		N	Customer				N				0					
33	4849	USA	4		N	Customer				N				438					
34	15162	USA	5		N	Customer				N				0					
35	2503	USA	3		N	Customer				N				0					
36	5620	USA	3		N	Customer				N				0					

Excel after Pasting



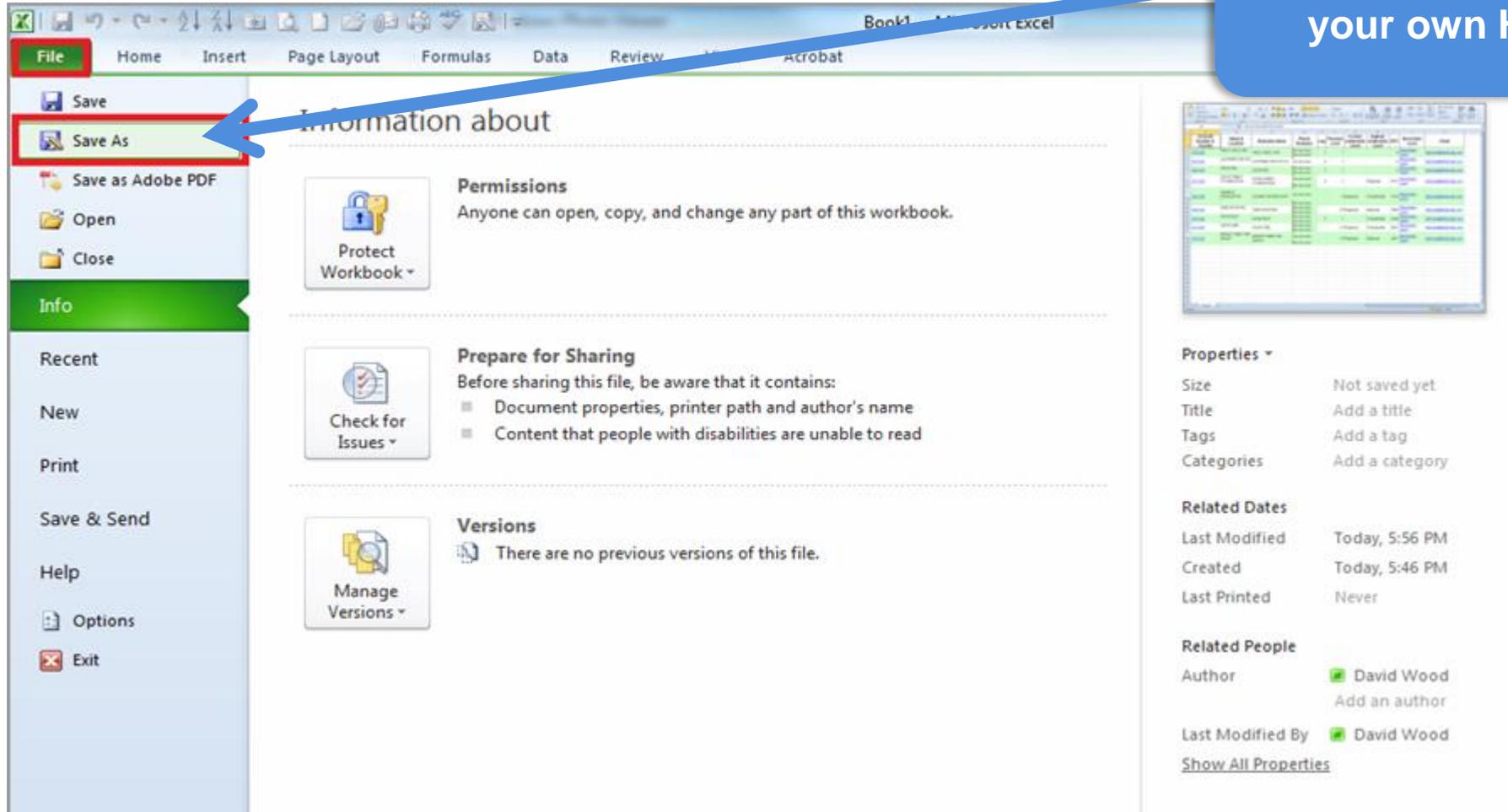
# MOVE THE DATA

Use the “Save As” button  
[or Ctrl + S] to save as a  
document in your own  
filing system.



# MOVE THE DATA

Save it as a document on your own Hard Drive



The screenshot shows the Microsoft Excel interface. The 'File' tab is selected in the ribbon, and the 'File' menu is open, with 'Save As' highlighted. A blue arrow points from the 'Save As' option in the menu to a blue callout box. The 'Information' pane is visible on the right, showing sections for Permissions, Prepare for Sharing, Versions, Properties, Related Dates, and Related People. A small thumbnail of an Excel spreadsheet is also visible in the Properties section.

**File** Home Insert Page Layout Formulas Data Review Mailings Acrobat

- Save
- Save As**
- Save as Adobe PDF
- Open
- Close

**Info**

Recent

New

Print

Save & Send

Help

- Options
- Exit

**Information about**

**Permissions**  
Anyone can open, copy, and change any part of this workbook.

Protect Workbook

**Prepare for Sharing**  
Before sharing this file, be aware that it contains:

- Document properties, printer path and author's name
- Content that people with disabilities are unable to read

Check for Issues

**Versions**  
There are no previous versions of this file.

Manage Versions

**Properties**

Size	Not saved yet
Title	Add a title
Tags	Add a tag
Categories	Add a category

**Related Dates**

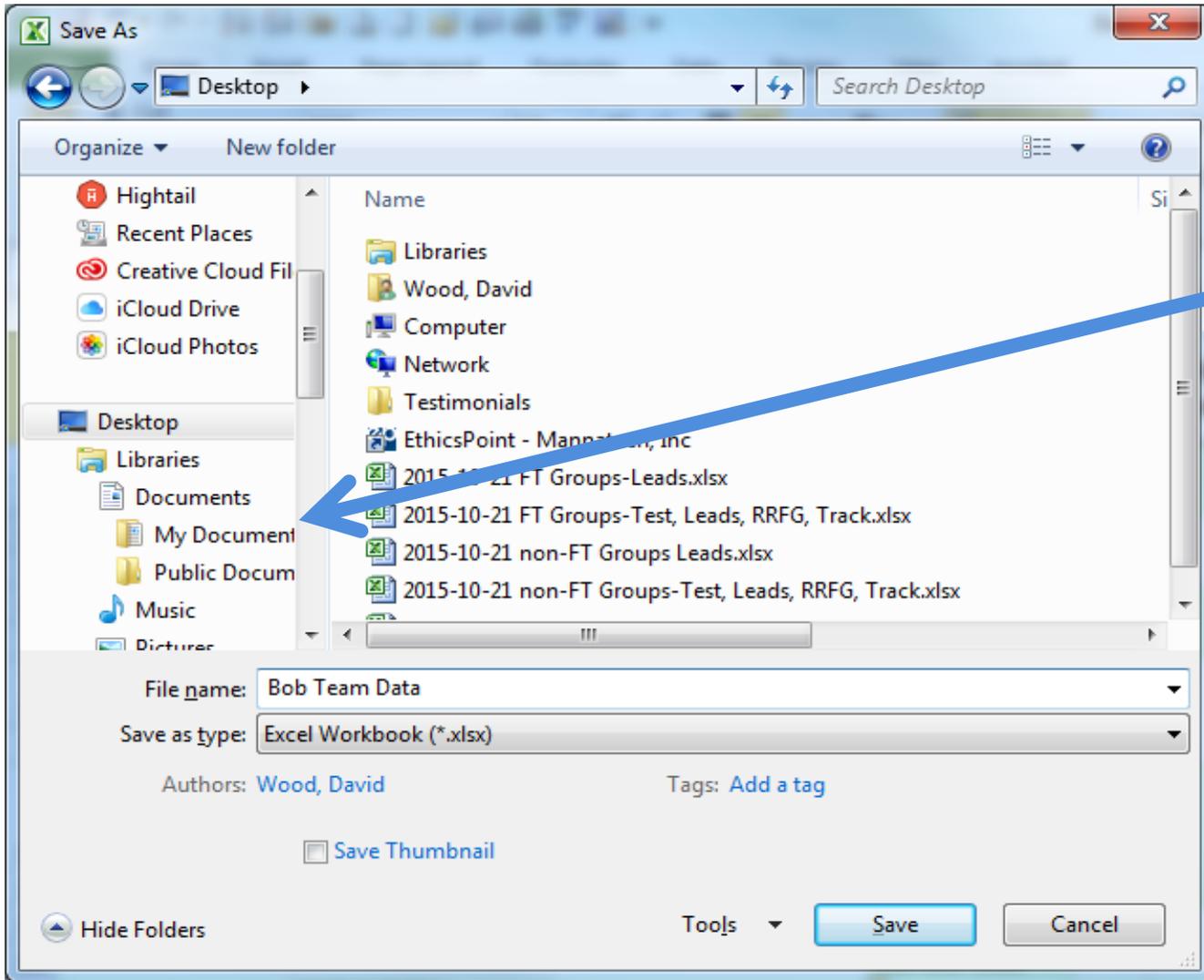
Last Modified	Today, 5:56 PM
Created	Today, 5:46 PM
Last Printed	Never

**Related People**

Author	<input checked="" type="checkbox"/> David Wood
	Add an author
Last Modified By	<input checked="" type="checkbox"/> David Wood

[Show All Properties](#)

# MOVE THE DATA



Save it as a document on your own Hard Drive like your Desktop or “My Documents”.

# PURPOSE

GOAL: **Reactivation**

Find the data to help me to “reengage” my inactive Associates and Customers who have the highest chance of re-establishing their Mannatech product purchases.



# STRUCTURAL CONSIDERATIONS

Considerations when you identify candidates for “purging.”

## PRE-PURGE

Preserving desired accounts/positions.

## POST-PURGE

Re-Structuring potential  
Incentive Implications (North America)

**NOTE:** What happens if a “purge candidate” places an order on May 24?



# SORT THE DATA

## Step 1: Eliminate all Terminated Accounts

- a. Select the “Term” column.
- b. Sort by “ZA”.
- c. Select all the “Y” boxes [YES = Terminated] by right clicking on the numbers on the left, and pressing “Delete”.

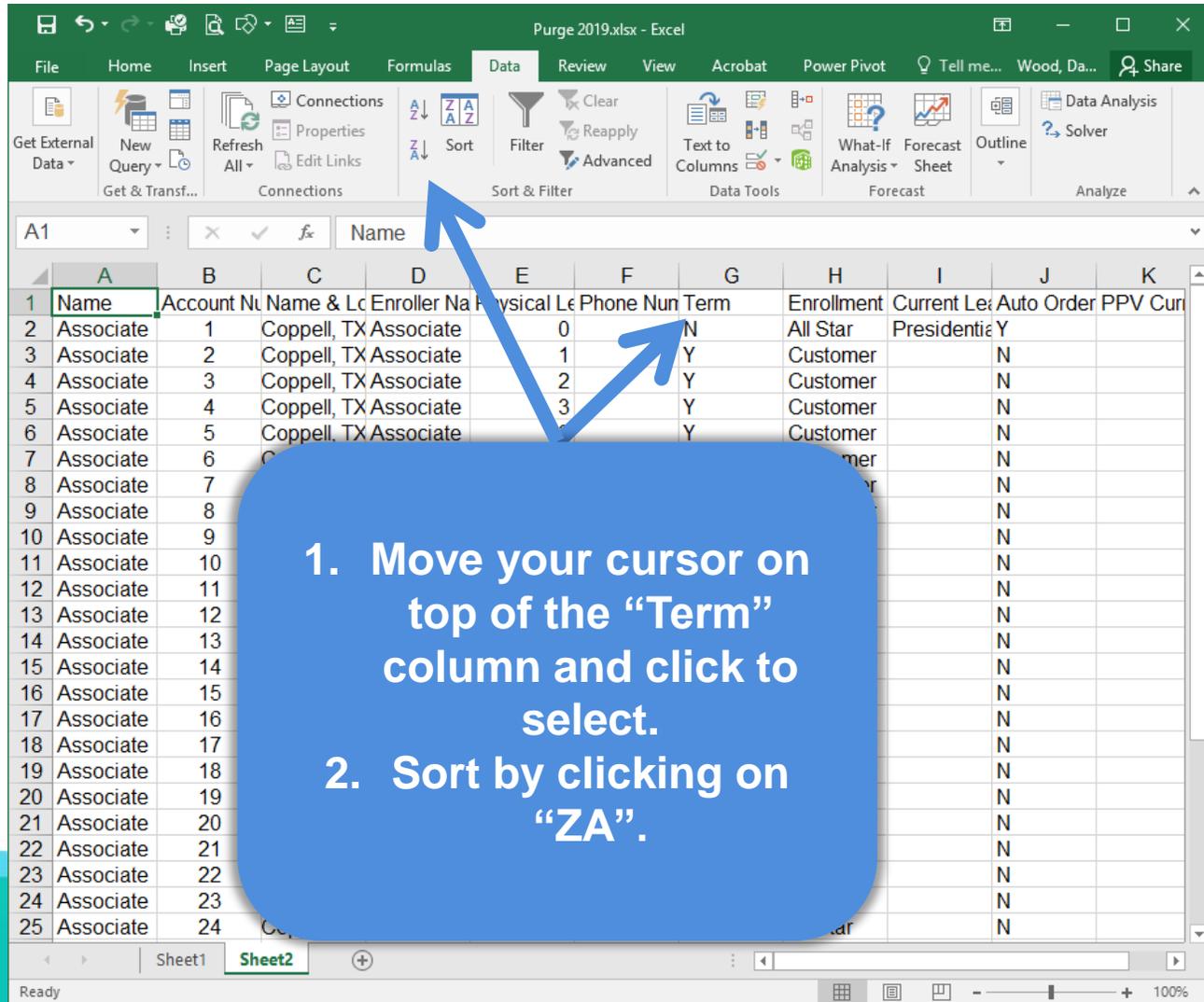
\* Renewed accounts will not be purged.

Non-renewed accounts will not be purged IF they have PPV since July 1, 2017.



# SORT THE DATA

## Step 1: Eliminate all Terminated Accounts



The screenshot shows the Microsoft Excel interface with the 'Data' tab selected. The 'Sort' button in the 'Sort & Filter' group is highlighted with a blue arrow. A blue callout box with white text provides the following instructions:

1. Move your cursor on top of the "Term" column and click to select.
2. Sort by clicking on "ZA".

	A	B	C	D	E	F	G	H	I	J	K
1	Name	Account Nu	Name & Lc	Enroller Na	Physical Le	Phone Nun	Term	Enrollment	Current Lex	Auto Order	PPV Cur
2	Associate	1	Coppell, TX	Associate	0		N	All Star	Presidentia	Y	
3	Associate	2	Coppell, TX	Associate	1		Y	Customer		N	
4	Associate	3	Coppell, TX	Associate	2		Y	Customer		N	
5	Associate	4	Coppell, TX	Associate	3		Y	Customer		N	
6	Associate	5	Coppell, TX	Associate			Y	Customer		N	
7	Associate	6						Customer		N	
8	Associate	7								N	
9	Associate	8								N	
10	Associate	9								N	
11	Associate	10								N	
12	Associate	11								N	
13	Associate	12								N	
14	Associate	13								N	
15	Associate	14								N	
16	Associate	15								N	
17	Associate	16								N	
18	Associate	17								N	
19	Associate	18								N	
20	Associate	19								N	
21	Associate	20								N	
22	Associate	21								N	
23	Associate	22								N	
24	Associate	23								N	
25	Associate	24								N	

# SORT THE DATA

## Step 1: Eliminate all Terminated Accounts

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

	A	B	C	D	E	F	G	H	I	J	K
1	Name	Account Number	Name & Location	Enroller Name	Physical Location	Phone Number	Term	Enrollment Category			
2	Associate	1	Coppell, TX	Associate	0		N	All Star			
3	Associate	2	Coppell, TX	Associate	1		Y	Customer			
4	Associate	3	Coppell, TX	Associate	2		Y	Customer			
5	Associate	4	Coppell, TX	Associate	3		Y	Customer			
6	Associate	5						Customer			
7	Associate	6						Customer			
8	Associate	7						Customer			
9	Associate	8						Customer			
10	Associate	9						Customer			
11	Associate	10						Customer			
12	Associate	11						Customer			
13	Associate	12						Customer			
14	Associate	13						Customer			
15	Associate	14						Customer			
16	Associate	15						Customer			
17	Associate	16						Customer			
18	Associate	17						Customer			
19	Associate	18						Customer			
20	Associate	19						Customer			
21	Associate	20						Customer			
22	Associate	21						All Star			
23	Associate	22	Coppell, TX	Associate	4		N	All Star			
24	Associate	23	Coppell, TX	Associate	5		N	All Star			

# SORT THE DATA

## Step 2: Identify & Eliminate the Non-Purge accounts (Active since July 1, 2017)

- a. Select the “Last Order Period” column.
- b. Sort by “ZA”.
- c. Delete all accounts active since July, 2017.
- d. Save Report [“Inactive Accounts, May 2019” – tab 1 “All”]

NOTE: To this point, you have been eliminating accounts that will NOT be purged.  
Remaining accounts are candidates for purging.



# SORT THE DATA

## Step 3: Identify the “Highest Priority” people

### START WITH “RECENT” GROUP

- a. Select the “Career Purchases” column.
- b. Sort by “ZA” (highest to lowest).



# SORT THE DATA

## Step 4: Identify the Most Recent Purchasers

### START WITH THE “HIGHEST PRIORITY” PEOPLE (step 3)

- a. Select the “Last Order Period” column.
- b. Sort by “ZA” (most recent to oldest).



# SORT THE DATA

## Step 5: Establish personal action plan

### OPTIONS

- a. Follow up with Purchasers that are likely to reengage.
- b. Contact appropriate Purchasers from lower volume group.
- c. Contact appropriate Purchasers from less likely to reengage group.



# RESOURCES

<https://library.mannatech.com/index.php>

## Resource Library:

1. Recording &
2. Instruction Sheet





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