**PURGE STRATEGY #1**

**Capture Your Team**

**Using SUCCESS TRACKER and Excel or a Spreadsheet alternative for saving valuable Contact Information**

* **GENERAL OBJECTIVE**: Review how to select Success Tracker data and move it to a spreadsheet.
* **SPECIFIC OBJECTIVE (Collect your Team Contact Information)**: Select your team data information and save it your personalized Excel file for your permanent records.
* **PROCESS:** Our 2-Step Capture Process for working with Success Tracker:
  + 1. GET IT!
    2. MOVE IT!

**Have Success Tracker & Excel Open**

# GET IT!

In Success Tracker, select the **“Genealogy group”** from the left-hand menu.

Select **the “Genealogy” report** from this group.

In “Step 1” of the Genealogy report:

* + - Enter your Country.
    - Enter your Account Number (or the Account number of the leg, group or leader whose data you want to save.)
    - Now skip down to “Step 4” in the Genealogy report.

In “Step 4,” of the Genealogy Report you will **“customize”** the information you want to save for your permanent records.

* + - Click on “Selected Columns” which opens all your options for information to choose.
    - Check “Select All” at the top to get all contact and important team data.

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

In “Step 5” of the Genealogy report:

* + - * Open the drop down box and select “Tab Delimited.”
      * Click on “Show Report.”

# MOVE IT!

In Excel, select the “Edit” menu from the top.

Highlight ALL the data by choosing “Select All” [or Ctrl A]

COPY the data (that is, hold in memory) by selecting “Copy” [or Ctrl C]

Move it all to your Excel spreadsheet (which should be open) by

PASTING the data. Place your cursor in the top left (A-1) cell, and select the “Paste” button (in the top left hand corner) [or Ctrl V]

Using the “Save As” button, you will want to SAVE this as a document in your own filing system.