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!

<p align="center">Have Success Tracker & Excel Open</p>

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.