data axle · genie

Mobile App-Business Database Guide
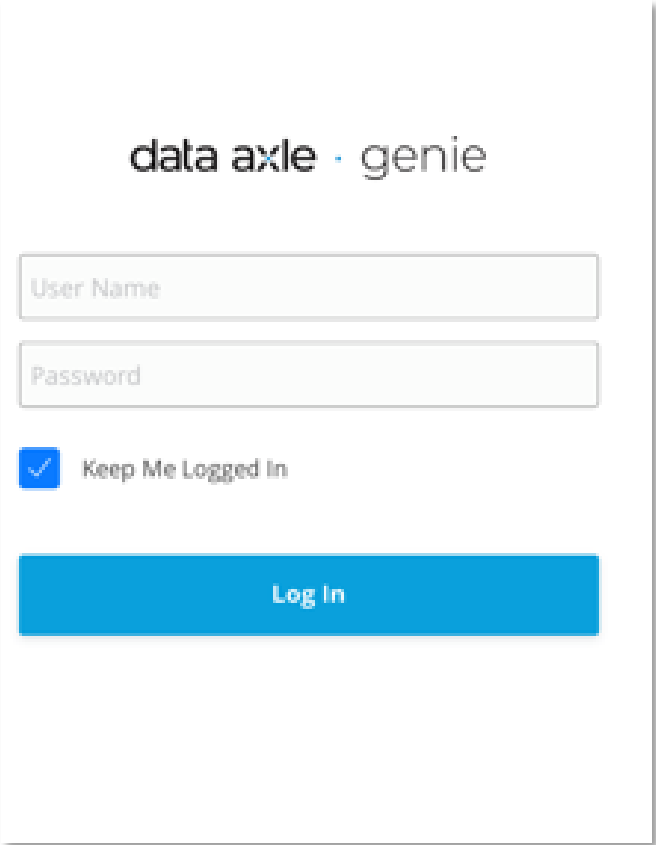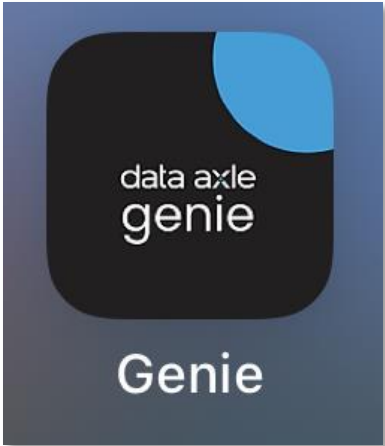
Logging into your account:

Download the Data Axle Genie mobile app from the App Store or Google Play store

Tap on the Data Axle Genie icon/app on your mobile device, then enter your login credentials.
(Use the same credentials used on the Genie website.)
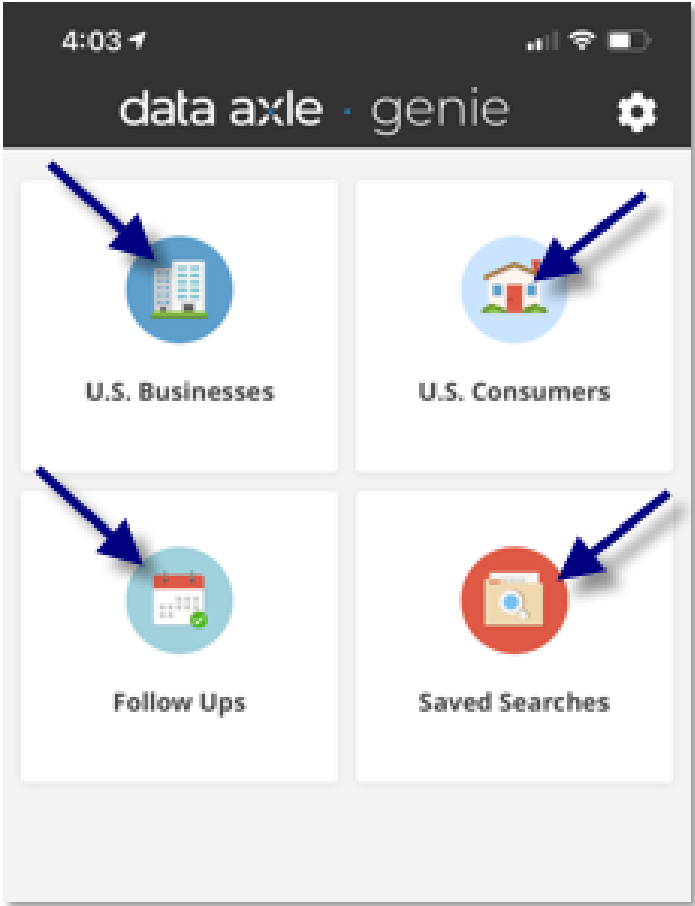
Home Screen:

The Home Screen gives you the ability to do GPS based searches for US Businesses as well as access to Saved Searches and Follow ups created within the Genie website.
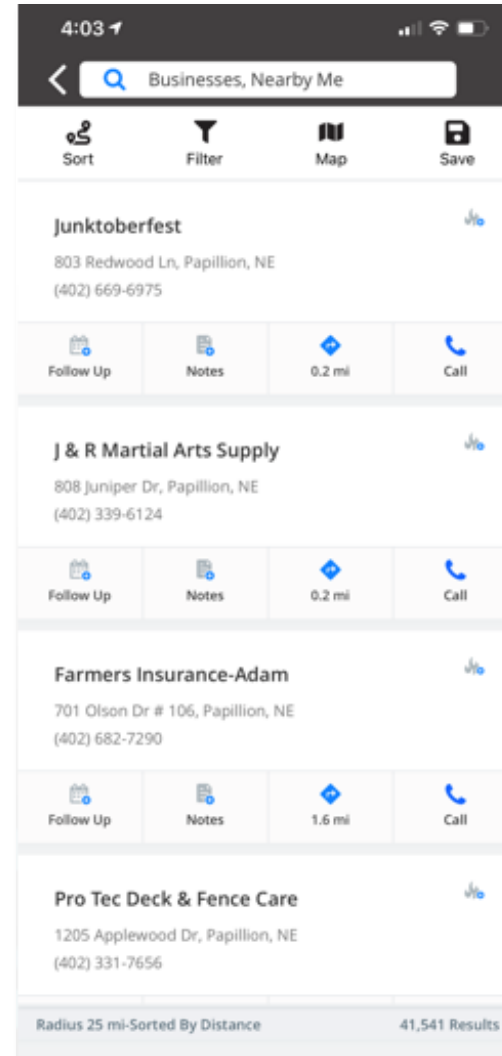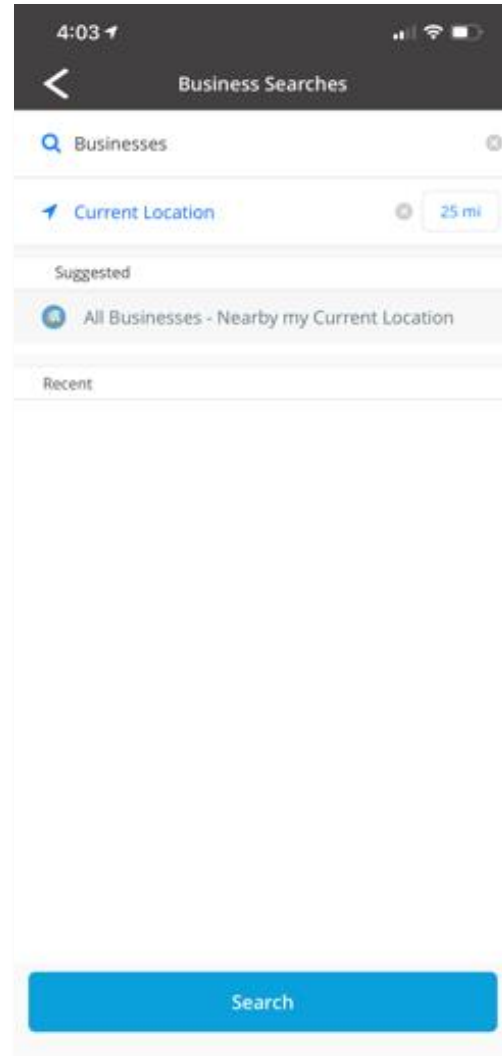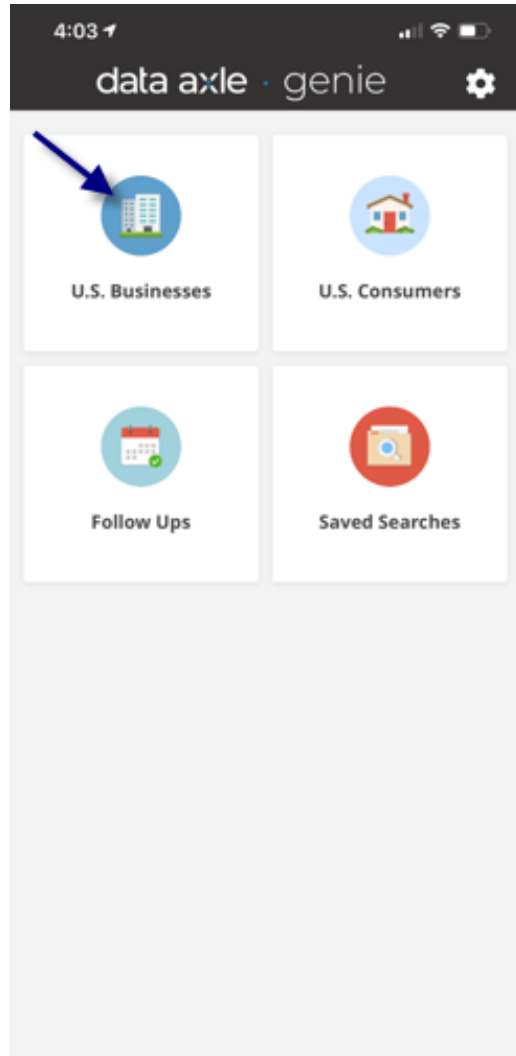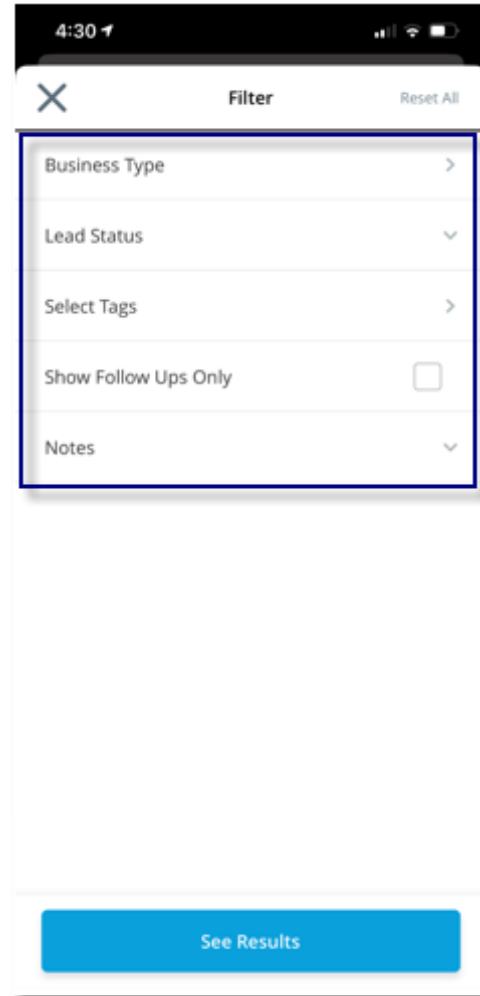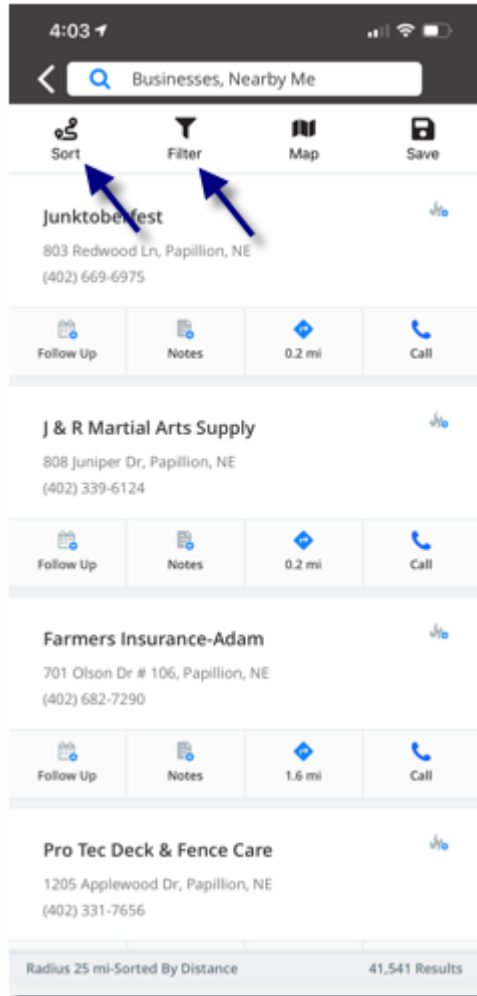*The US New Business database is not available on the mobile app.*

US Businesses

US Businesses

Tap on US Business to produce a list of companies nearby your location. (Make sure your mobile device has GPS settings turned ON)
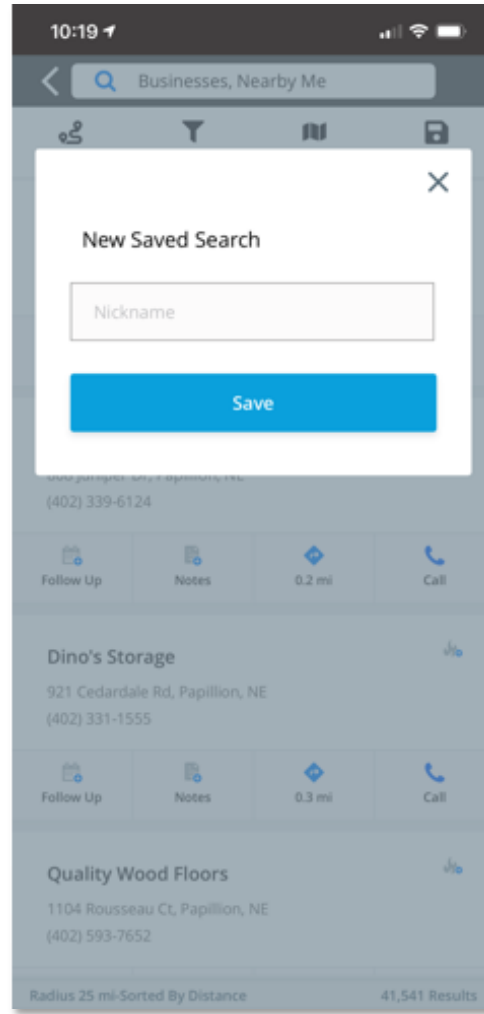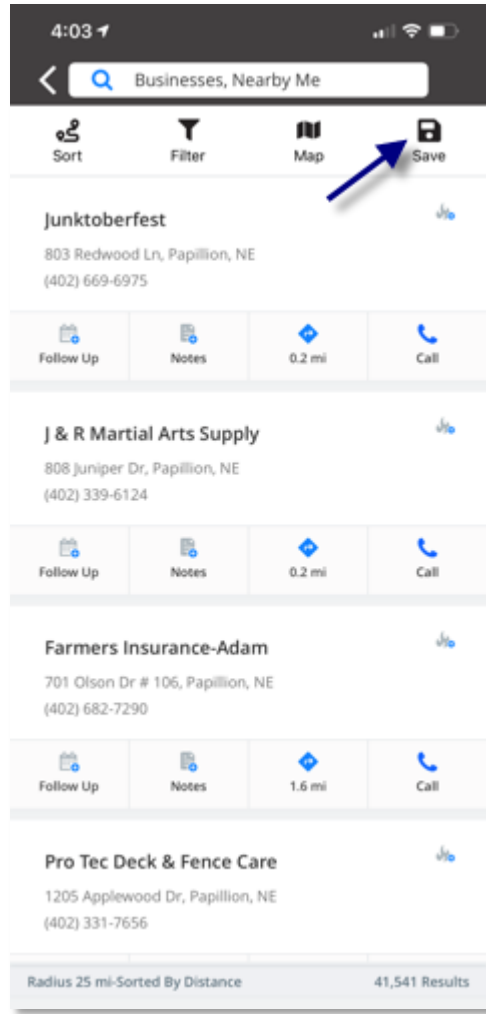
US Businesses: Filtering Results

Use the Sort & Filter icons at the top right of your search results to sort the list A-Z, Z-A, by Distance, Business Type (SIC Codes), or records with Lead Status/Tags/Follow Ups/Notes.
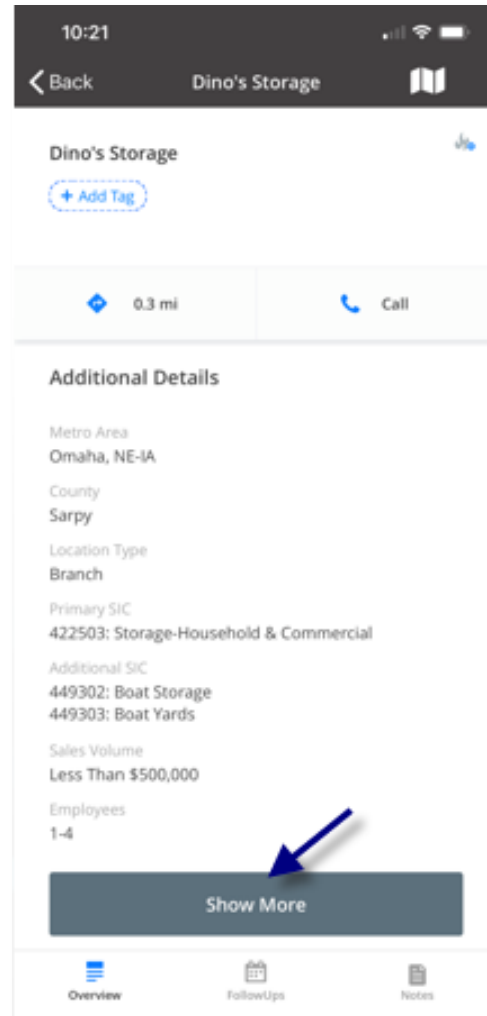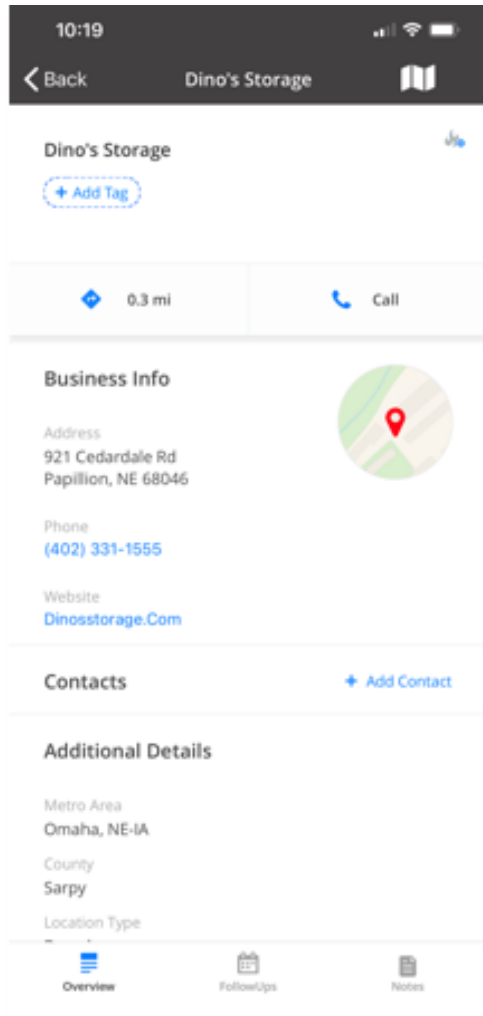
US Businesses: Saving Search Results

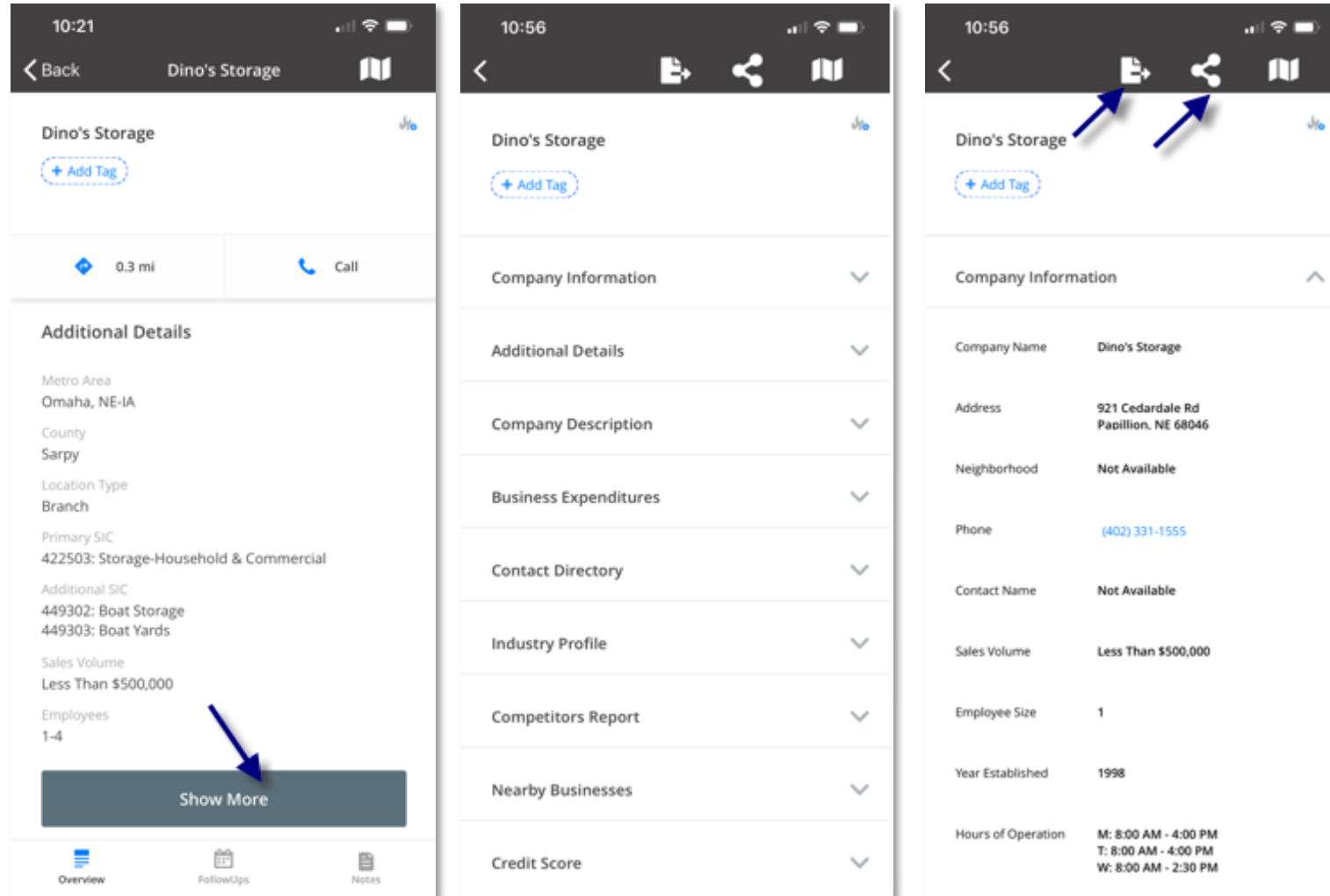**Simply tap on Save in top right to name and save your results.**

US Businesses: Viewing Profiles

Tap on the name of a record to view the basic profile. While viewing the basic profile, simply tap on **Show More** to view the detailed profile of the record.
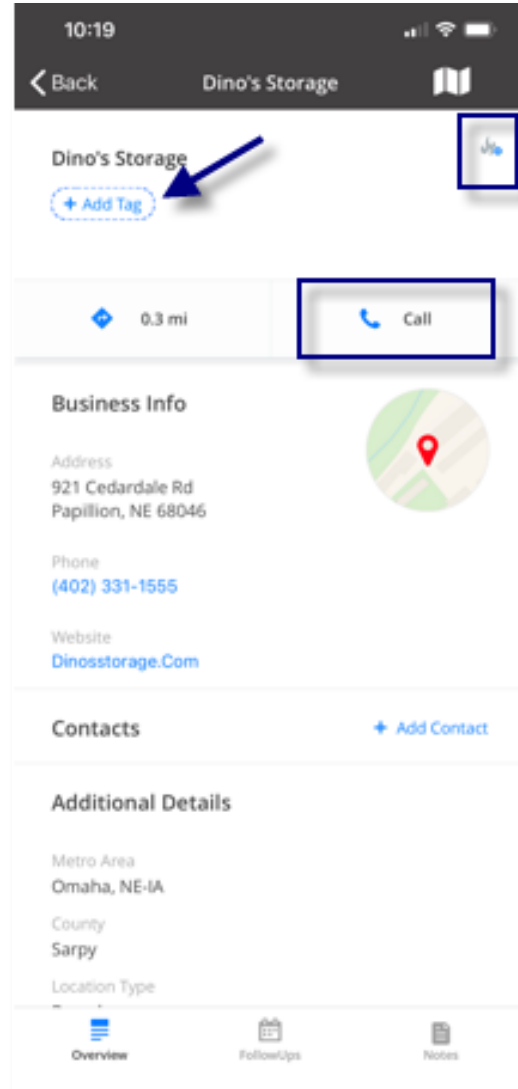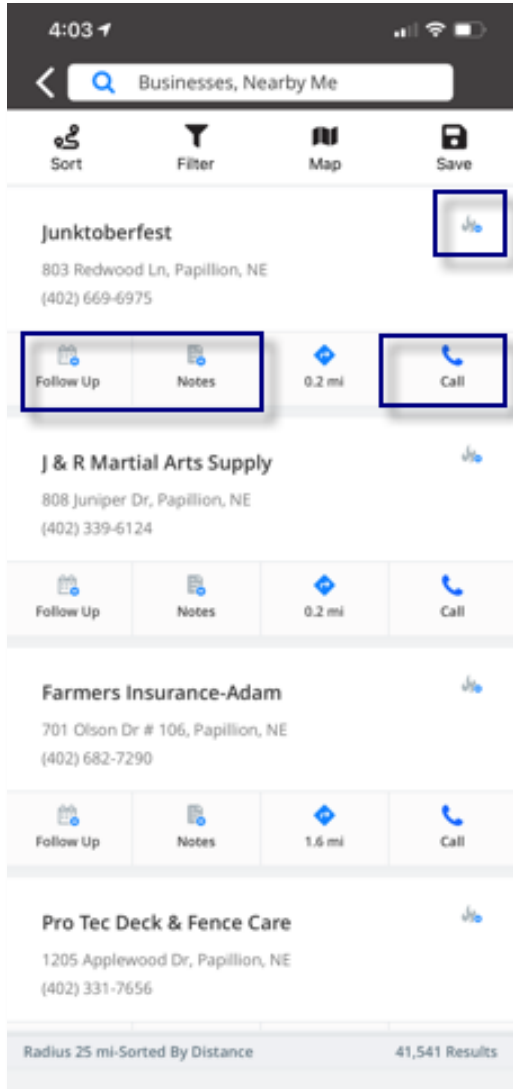
Exporting record to CCLM

In the top right, simply tap on the export icon and the record will be transferred to CCLM.
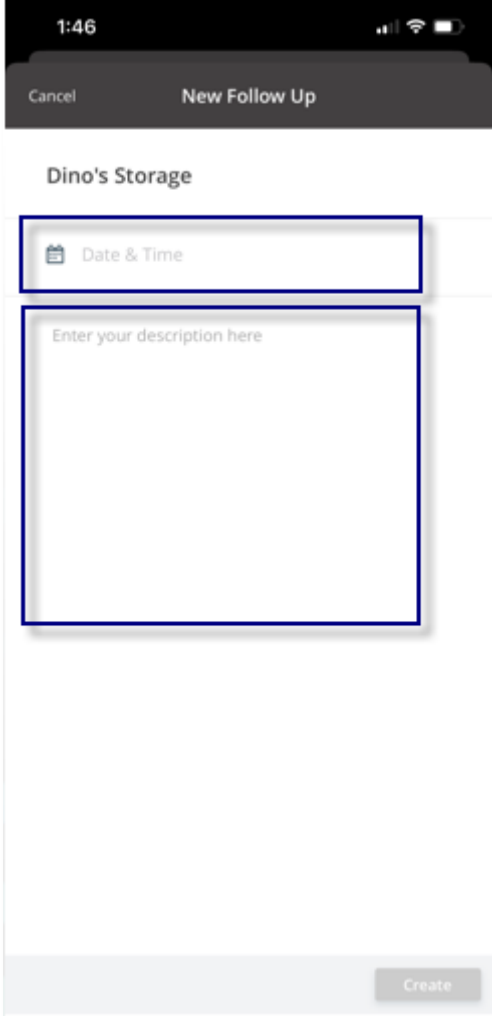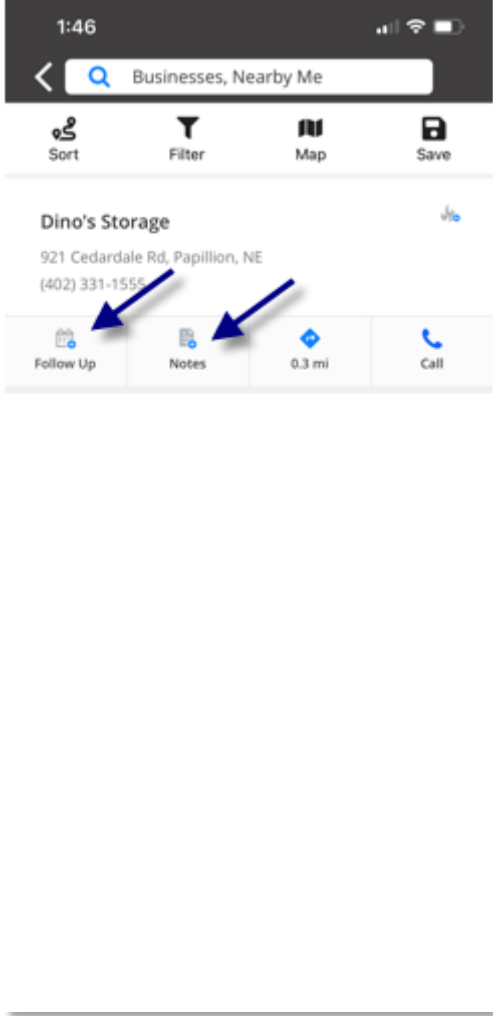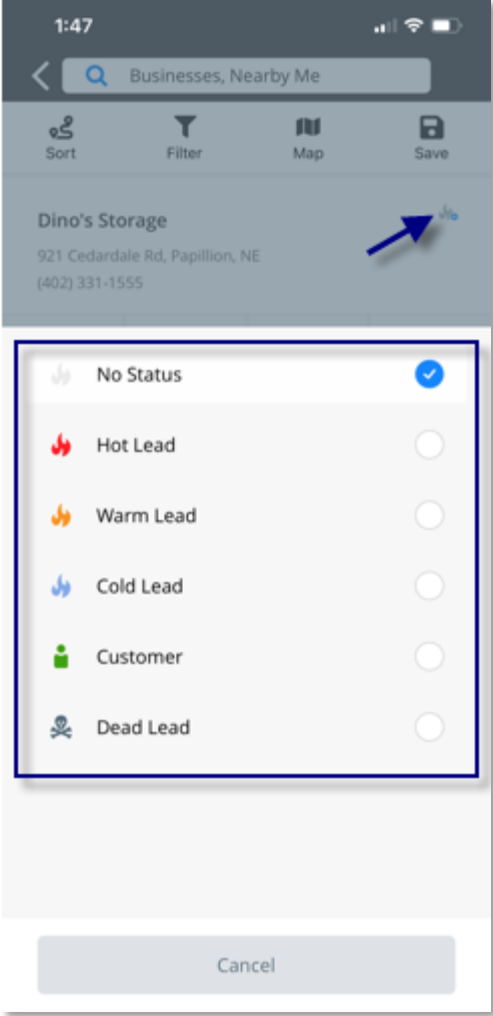
US Businesses: Add Lead Status, Notes, Follow Ups, Tags and Call Record

From the list view, you can tap on the icons to add Lead Status, Follow Ups, Notes and Call the record from the screen. Tap on a business to view the profile to add Tags and still have Lead Status and Call available.
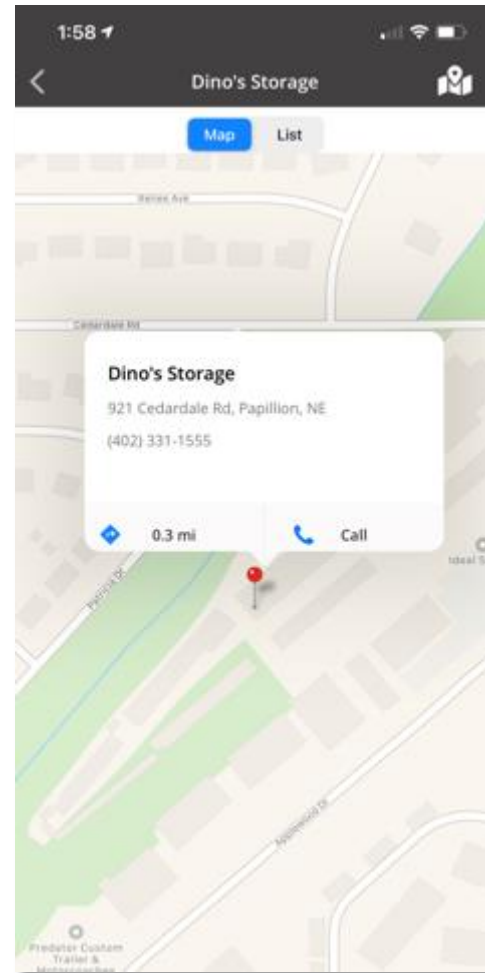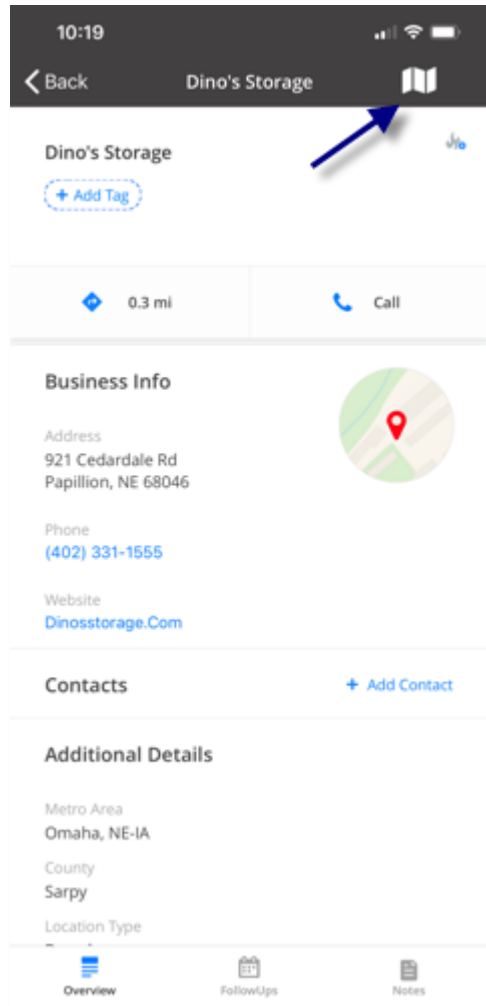
US Businesses: Add Lead Status, Notes, Follow Ups, Tags and Call Record

Lead Status allows you to assign a lead status to records while on the search screen. Tap Follow Up and Notes to open a new window to enter the follow up or note you wish to assign to the record.
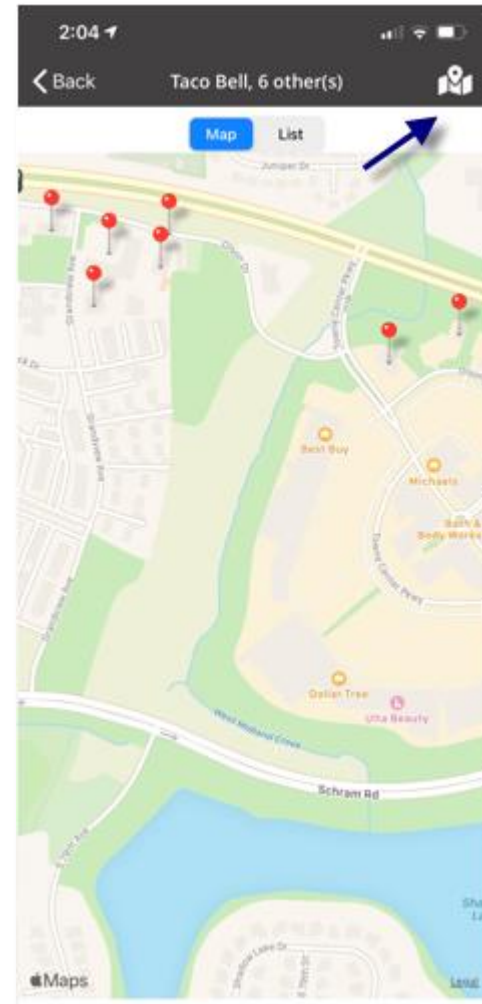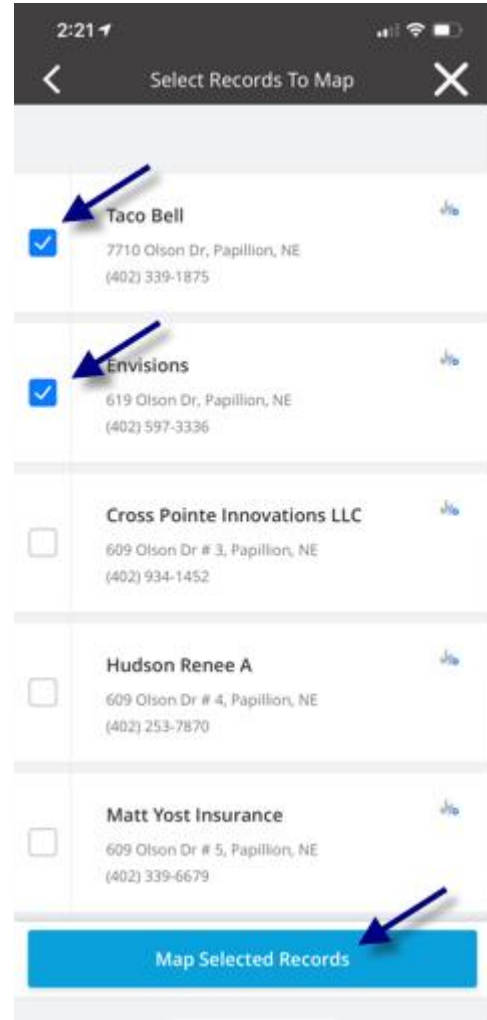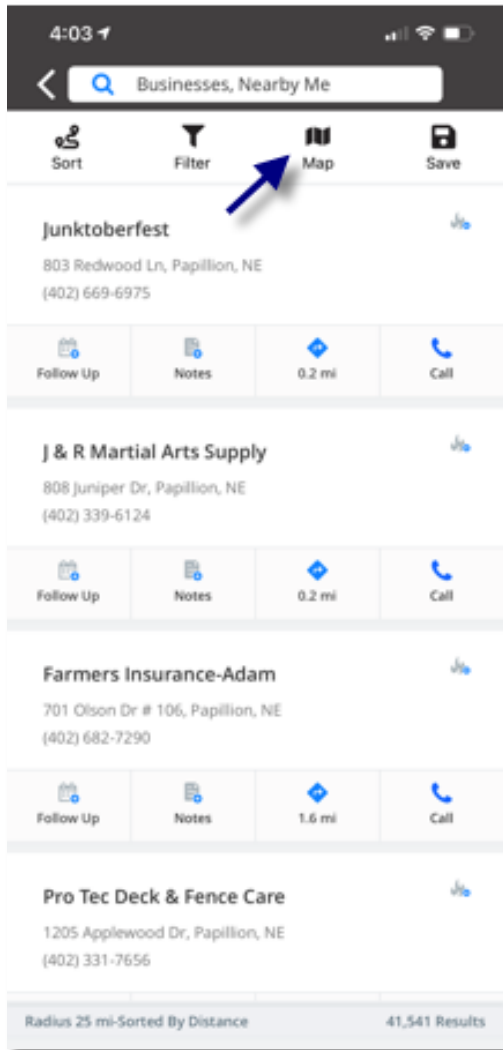
US Businesses: View Record on a Map

Tap the business name to open the profile page, then tap the Map icon to view this record on the map. You can see distance from your location as well as call the record.

US Businesses: View List of Records on a Map & Produce Drive Route

From the List view, tap on Map and select the records you wish to view together on the map. Tap the map location icon in the right corner of the map and this will open Google Maps to produce a drive route. (Make sure Google Maps app is installed on phone.)
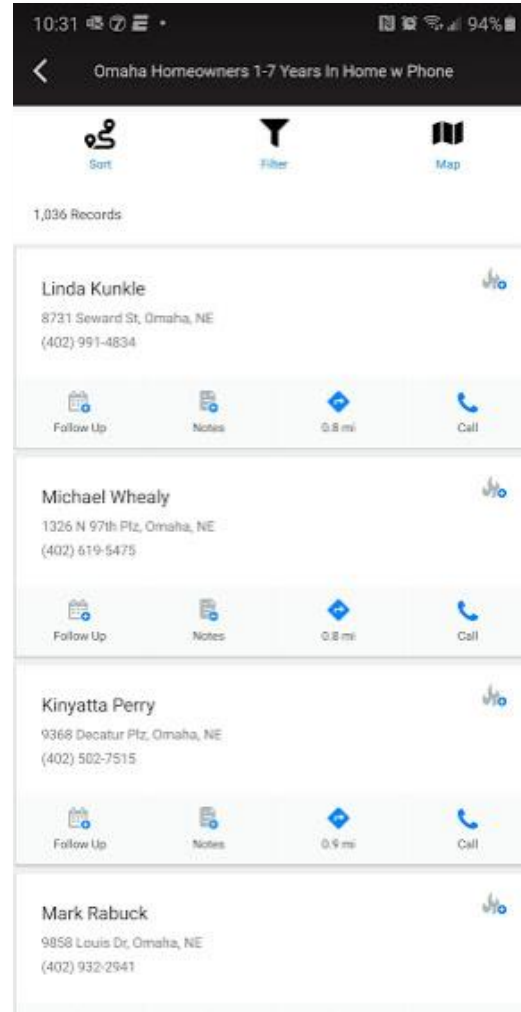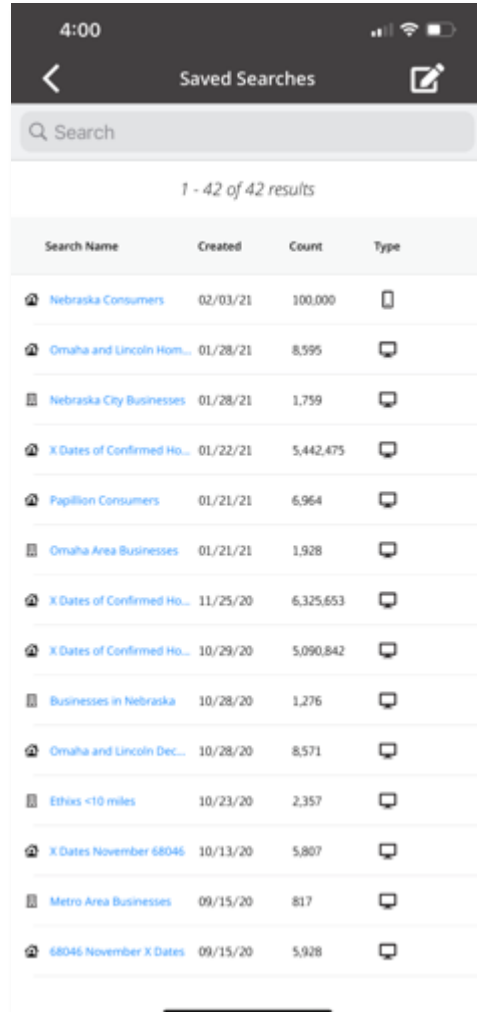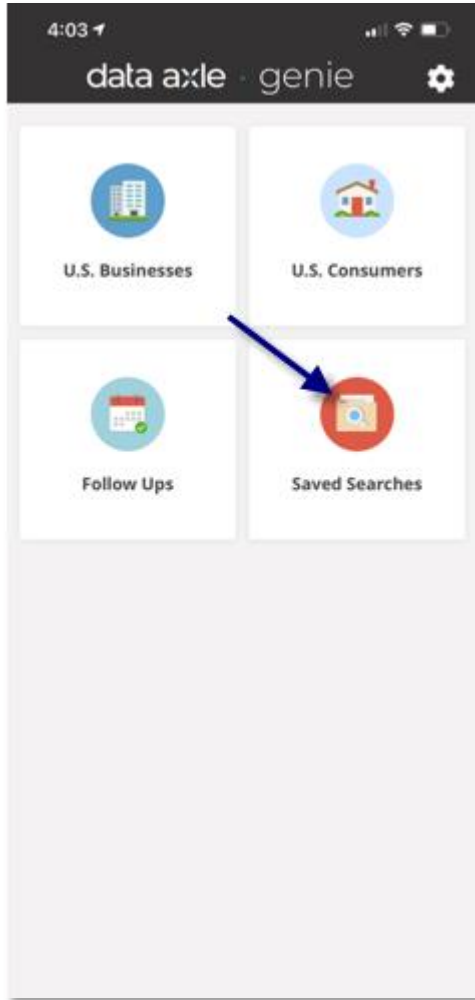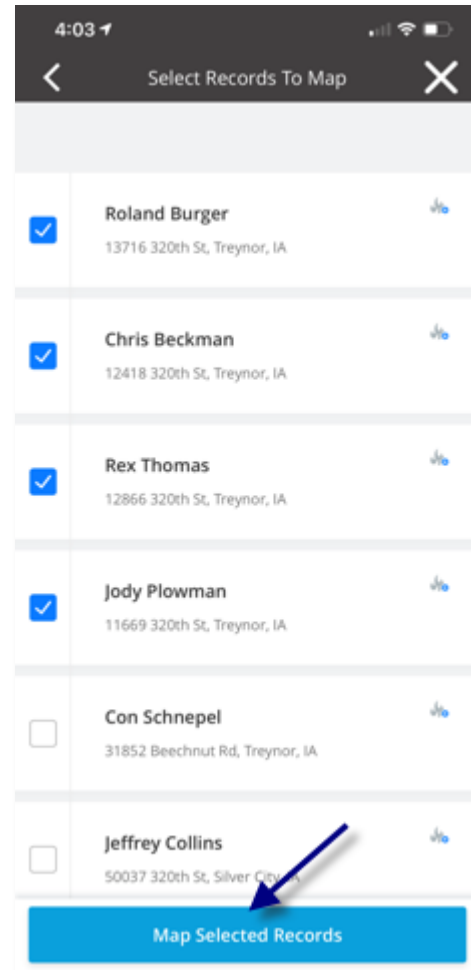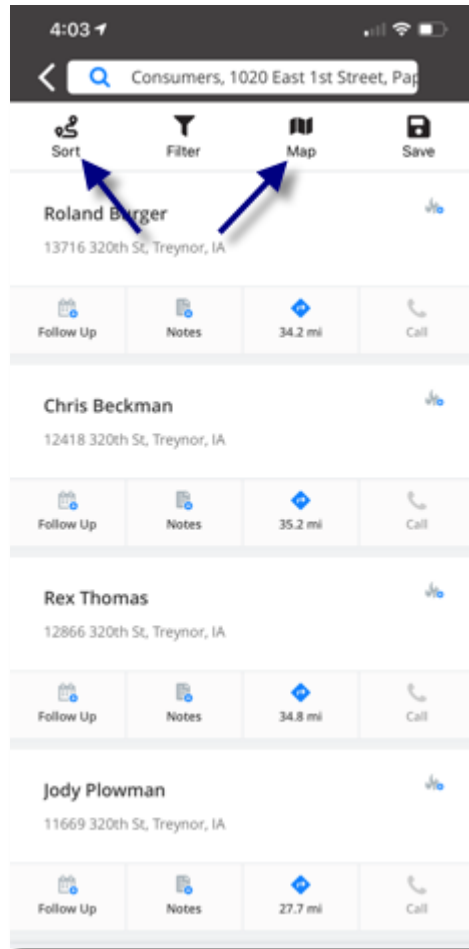
Saved Searches & Follow Ups

Saved Searches

On the Home screen, tap on Saved Searches to access searches you have created on the website. Tap the name to view on the mobile app.
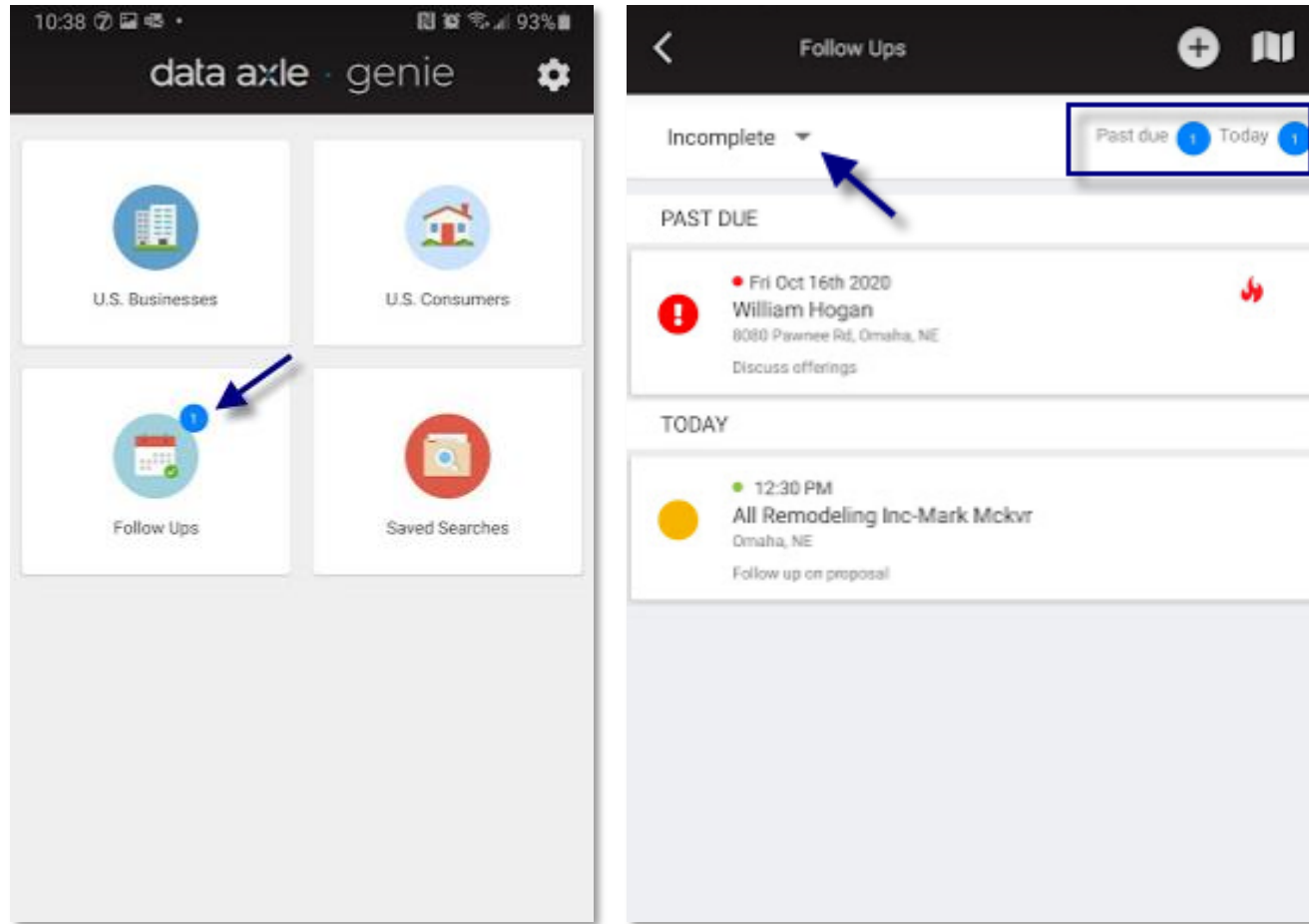
Saved Searches: Sort & Map Lists

You can sort the saved search alphabetically or by distance as well as select records to show on a map. Tap the map location icon in the right corner of the map and this will open Google Maps to give you a drive route to these records.
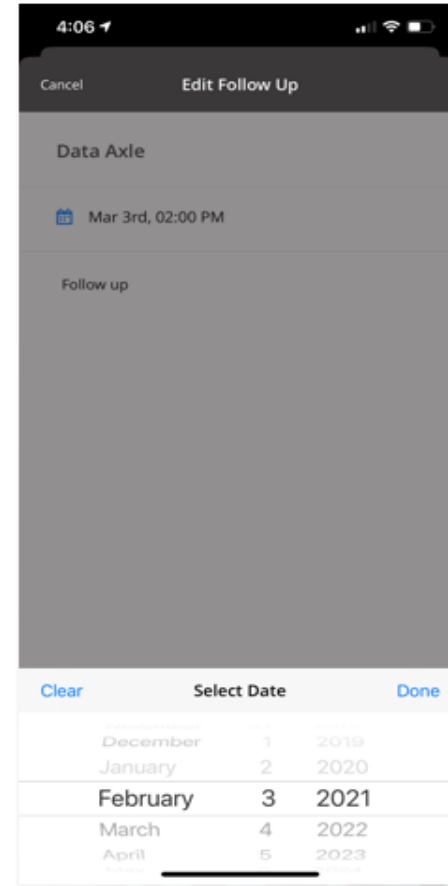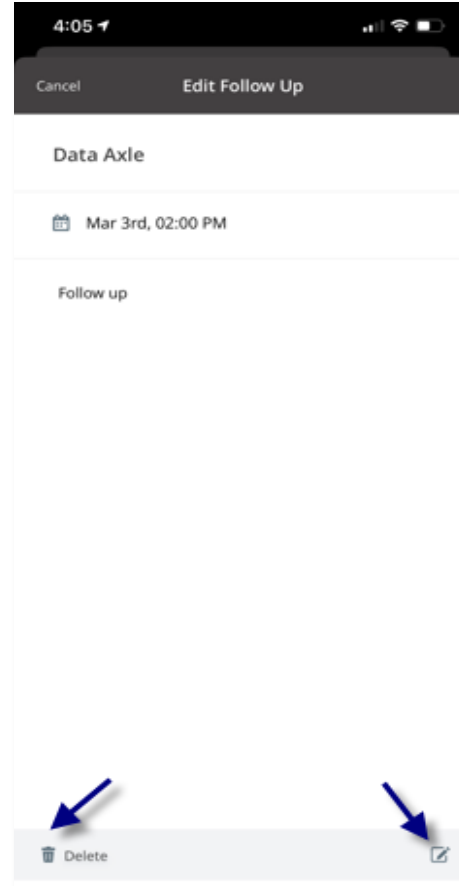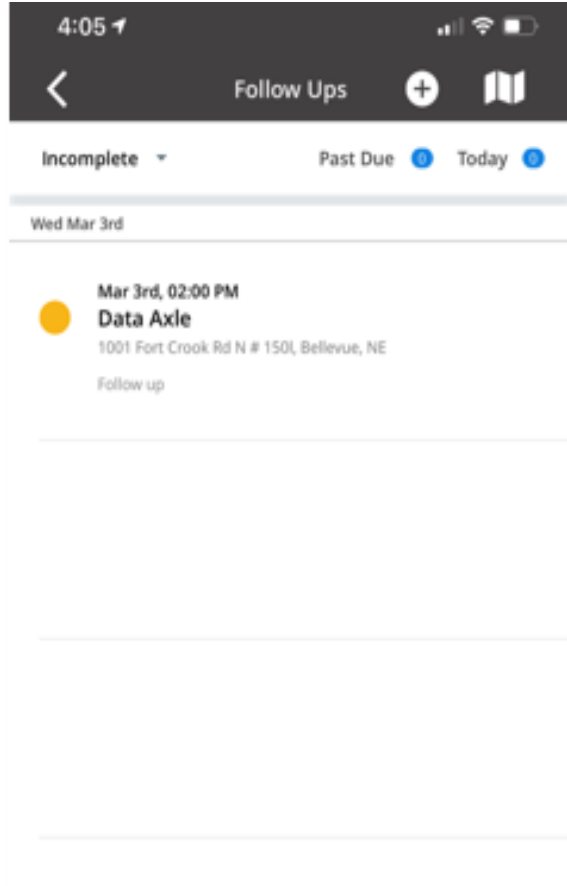
Follow Ups

If you have follow ups scheduled the day you are in the mobile app, you will see a number above Follow Ups indicating you have a Follow Up today. Tap Follow Up to access all current, past due and upcoming follow ups.

Follow Ups

Tap on a follow up to edit the follow up date, time and description. Tap delete to completely remove the follow up.

For questions/additional training please contact us at 866.692.0262 or email aflachelp@data-axle.com

You can also visit Data-Axle Genie help site for Aflac at: https://www.dataaxlegenie.com/aflac/home/ for FAQs, how-to-guides and step by step tutorials.