

## Data Axle Genie Pre-Saved Searches & Exporting Leads into CCLM Usage Tutorial

### Pre-Saved Searches

1. To search based on Aflac's pre-set criteria for the best target industries, click on your preferred Saved Search such as *Targeted Industry Business Leads* on the Genie homepage.
2. To target based on geography, click on *Filters* and add your desired location through the *Geography* tab.
  - a. You can filter by *City, Country, Zip Code*, etc.
3. Once you've selected your filter simply click on *Run Search* in the bottom right corner to view your results.
4. You now have a targeted search that is ready for prospecting in just two clicks.

### Saving and Exporting your Search

1. To continue working leads later, just click on the *Save* button in *List Options* directly below the search bar to save your search.
2. You can then export these leads directly to CCLM by clicking on the labeled *Export* button and naming your list.
3. There are more options for your list as well.
  - a. You can choose either the entire amount of records or a *Random Sample* if you want a smaller subset of leads to begin with.
  - b. If you just want to export one or more records that you've chosen, you can do that too. Simply click on the checkboxes on the left side and when exporting make sure you've chosen *Selected* under *Choose Records*.

Thank You for Using Data Axle Genie

**For additional support or questions, contact your Aflac customer support team at 866-692-0262 or email [aflachelp@data-axle.com](mailto:aflachelp@data-axle.com)**