# Syncing Genie with CCLM, Accessing Genie leads in CCLM & Genie Mobile App

Setting up your Genie account in CCLM is easy; just follow these simple steps!

### Step 1

- In the bottom left, click on "Sales" then click on "Settings"
- Within Settings, click on "Data Axle Genie Credentials"



## Step 2

- Click "+ New"



## Step 3

- Input your Data Axle Genie Username (entire Aflac email address), Data Axle Genie Password & CRM User (First & Last Name)

#### - Click "Save & Close"

ew Data Axle G	nie Credentials	
eneral		
Data Axle Genie Username	* New_DAGuser@ US.Aflac.Com	
Data Axle Genie Password	* 1234	
CRM User	×	

## Step 4

- Click "Home" to get back to the CCLM page
- Click "Data Axle Genie Prospector" to access Data Axle Genie within CCLM



Your Genie access in CCLM is ready for use!

0

## Where to find Data Axle Genie leads once exported to CCLM

Genie leads can be found by selecting the Leads icon under the "Sales" section

Sales					
🍄 Leads					
A Contacts					
Data Axle Genie P	System Views				
Comdea	All Leads (Editable)	Default			
Service	Hot Leads				
Accounts	Lost Leads				
තී Account Search	My STR Leads				
Open Enrollment	" Onen Leads with Articity in Left 20 Days				
	Open Leads with Activity in Last 30 Day	/5			
	Won Leads				
	S Reset default view				

From the "All Leads (Editable)" view, to find all leads exported into CCLM:

- Click on the filter option that reads "Lead Source" then choose Filter By
- In the 2<sup>nd</sup> drop down box select Data Axle Genie and check the box for Data Axle Genie below

- Click once more on the 2<sup>nd</sup> drop down so you have the Apply button (not shown below) available which will then filter only your Data Axle Genie leads.

All Lea	ds (Editable	e) ~			
Group By:	(no grouping)	ų.			
✔ Create	d On 🗸	Last Activity 1 🗠	Business Name 😒	Lead Source 🗠	First Name 🗸
3/ W/ E	ULL 3743 FWI	37976966	3-0 Services	1 1 1 1 1 1 M 1	thereing
2/4/2	022 8:48 AM	9/8/2022	Expo furniture	Filter by	×
1/12/	2022 11:08	9/8/2022	Motown Barber sny	Equals	~
1/20/	2022 9:11 AM	9/8/2022	daves Barber Shop	Data Axle Genie	~
1/20/	2022 9:15 AM	9/8/2022	hole shot preformane	HR Referral	
1/20/	2022 9:07 AM	9/8/2022	wild west feed pets an	Inbound	
1/20/	2022 8:58 AM	9/8/2022	Silver oak funding	JAM Session	
1/20/	2022 8:53 AM	9/8/2022	law office of Ryan K Sa		
2/4/2	022.8:58 AM	9/8/2022	Tramel construction inc	Networking Event	
1/20/	2022 8:45 AM	9/8/2022	elk grove plumbing & o	da Other	k mark
1/31/	2022 2:20 PM	9/8/2022	Echelon clothing	PACE Event	N
1/5/2	022 11:31 AM	9/8/2022	PAPA MURPHYS	Data Axle Genie	V
12/21	/2021 2:26 P	9/8/2022	battistone's gold river of	C Social Media	3

## Data Axle Genie Mobile Application

Don't forget! You can export leads from your Data Axle Genie mobile app into CCLM Simply tap on "**Show More**" from a company profile page, then tap on the Export icon

10:21 . 대 후 🖿 Back Dino's Storage 🕕	10:56 < 🗈 🗲	al ≎ ■) N
Dino's Storage	Dino's Storage	dia
🔷 0.3 mi 📞 Call	Company Information	~
Additional Details	Additional Details	~
Omaha, NE-IA County	Company Description	~
Sarpy Location Type Branch	Business Expenditures	~
Primary SIC 422503: Storage-Household & Commercial Additional SIC	Contact Directory	~
449302: Boat Storage 449303: Boat Yards Sales Volume	Industry Profile	~
Less Than \$500,000 Employees 1-4	Competitors Report	~
Show More	Nearby Businesses	~
<b>=</b> 🛍 🗈	Credit Score	~

For any questions, reach out to the Data Axle Genie Team Toll Free: 866-692-0262 Email: <u>aflachelp@data-axle.com</u>

You may also visit our Aflac Help site for how-to guides & video tutorials www.dataaxlegenie.com/aflac