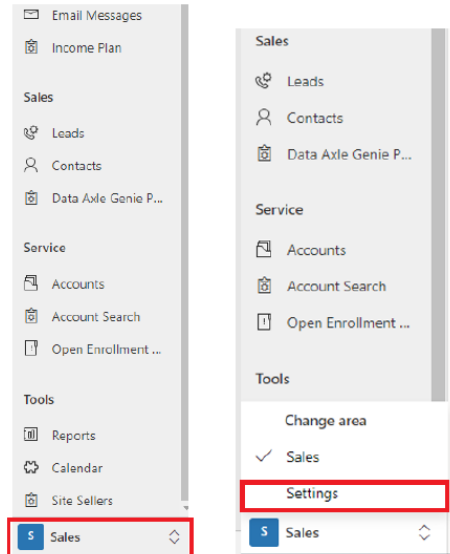


## Syncing Genie with CCLM, Accessing Genie leads in CCLM & Genie Mobile App

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

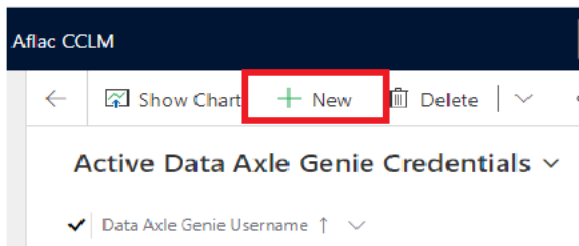
### Step 1

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



### Step 2

- Click **" + New "**



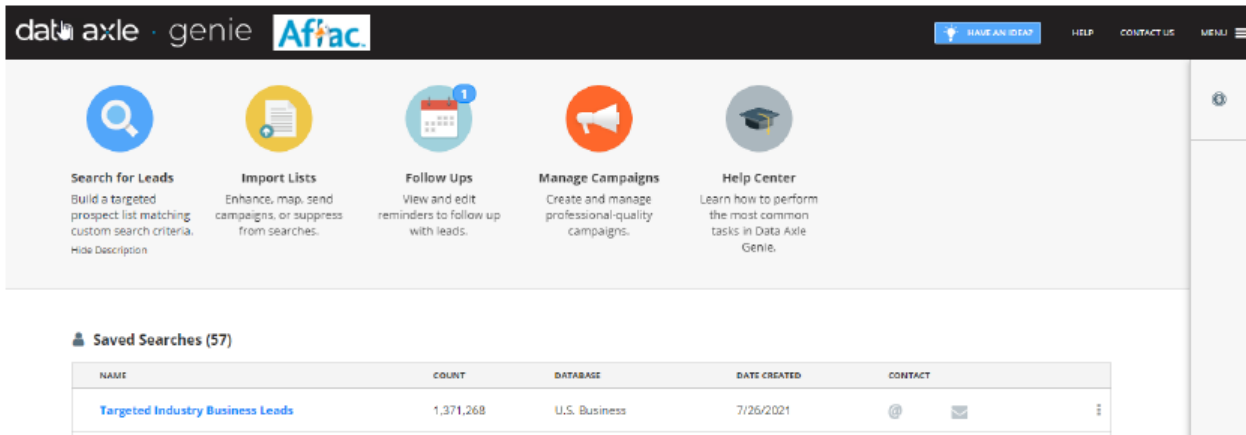
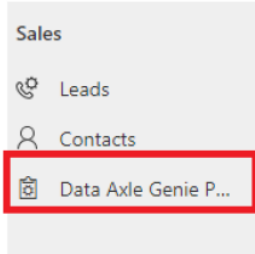
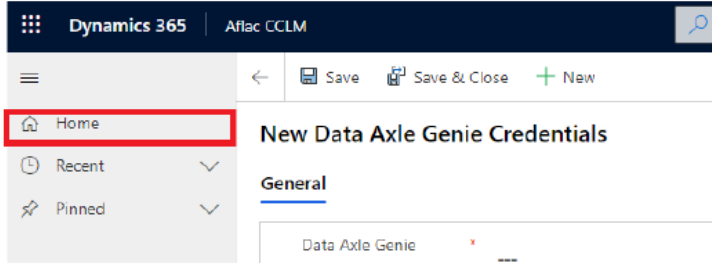
### Step 3

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

New Data Axle Genie Credentials	
<b>General</b>	
Data Axle Genie Username	New_DAGuser@ US.Aflac.Com
Data Axle Genie Password	1234
CRM User	---

#### Step 4

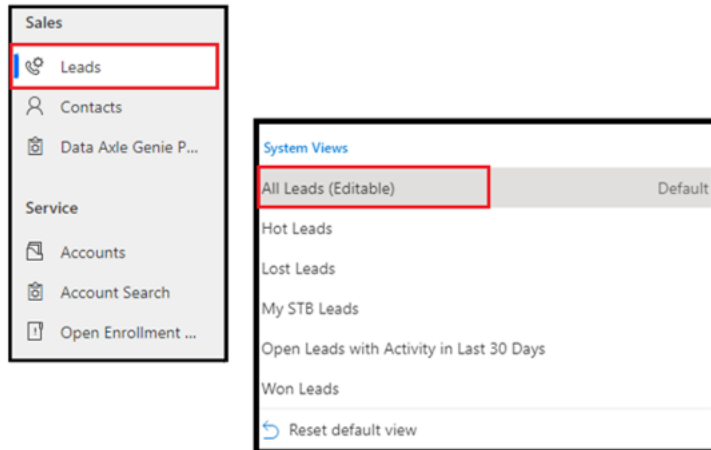
- Click **"Home"** to get back to the CCLM page
- Click **"Data Axle Genie Prospector"** to access Data Axle Genie within CCLM



Your Genie access in CCLM is ready for use!

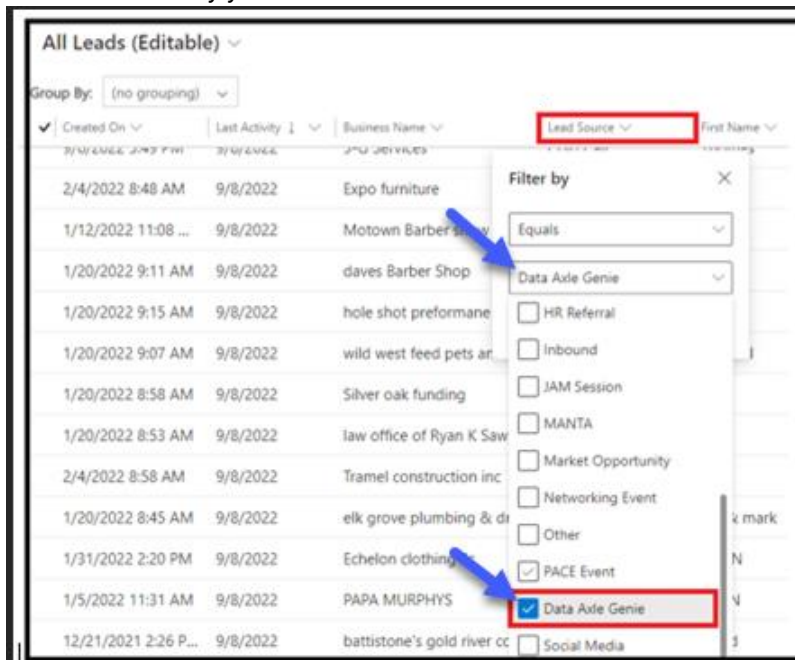
## Where to find Data Axle Genie leads once exported to CCLM

Genie leads can be found by selecting the **Leads** icon under the “Sales” section



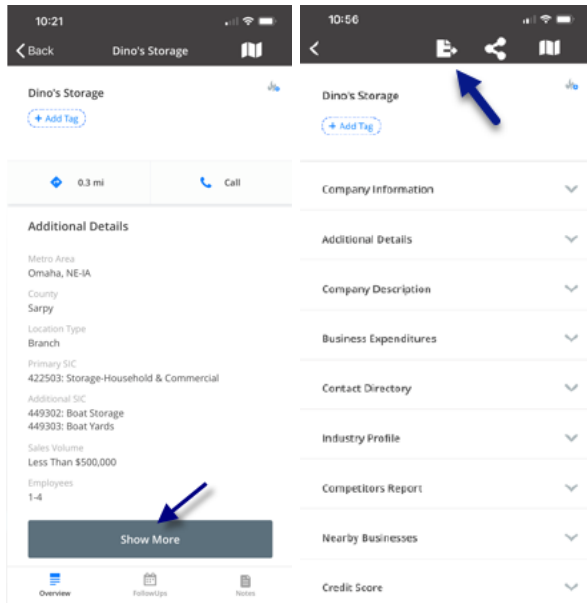
From the “All Leads (Editable)” view, to find all leads exported into CCLM:

- 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.



## 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



**For any questions, reach out to the Data Axle Genie Team**

Toll Free: 866-692-0262

Email: [aflachelp@data-axle.com](mailto:aflachelp@data-axle.com)

**You may also visit our Aflac Help site for how-to guides & video tutorials**

[www.dataaxlegenie.com/aflac](http://www.dataaxlegenie.com/aflac)