Data Axle Genie: Exporting B2B Prospects from CRM to Mobile Sales App Process

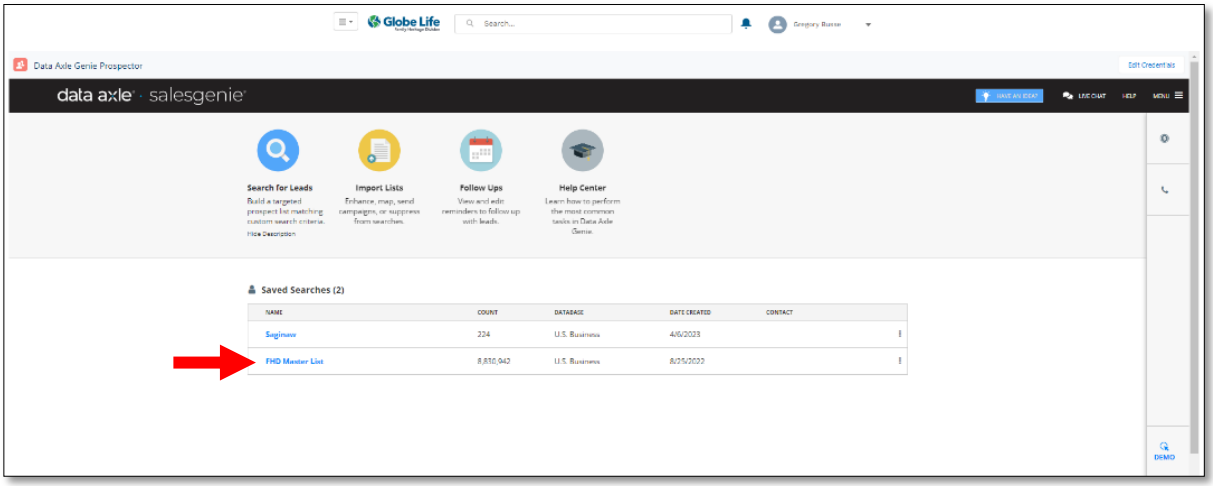
If you want to follow along with a step-by-step "how to" on the process of finding, then sending Business Prospects from Data Axle Genie, then this is the article to review. **Follow the steps below or to watch this full process outlined in this entire document, watch this video:** https://familyheritagelife-1.wistia.com/medias/77bc5765zc

1. After configuring your Device Settings as outlined in the Salesforce User Guide's "Getting Started" section (allow cross-site tracking, allow cookies and pop ups), navigate to Data Axle Genie's B2B Prospects to access the prospect database. (If you have not done so, watch this video to get started: https://familyheritagelife-1.wistia.com/medias/81z2gnnsfh).

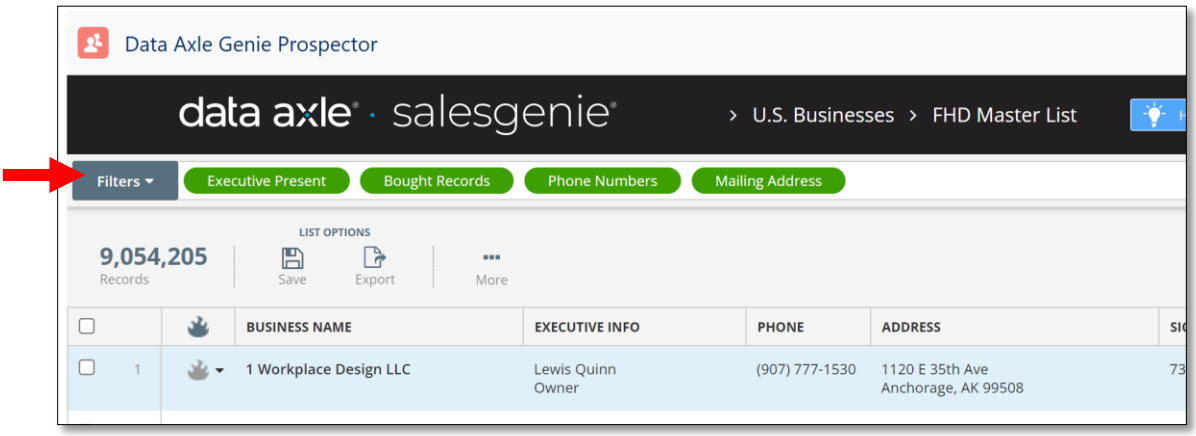
   If you have not logged into Data Axle before, recently cleared cache/cookies, or are accessing from a different device than usual, then sign in with your Email as the username and the generic lowercase password (genie123). If unsure which email address to use, check your correspondence for an email with the subject line "*Genie Access is now LIVE!*" which will provide your login information.

   If you have already logged in before, you will see the Data Axle Genie landing page below.

   Select the Saved Search link on the page titled "**FHD Master List**":



2. Select the "**Filters**" button at the top-right corner:



3. On this screen, at the top-left, **tap the Filters button** (gray colored button). There are many filtering options available to you and based on what you are looking for, you can add several of them as your criteria for filtering. Filter function and set filters will display at the top:

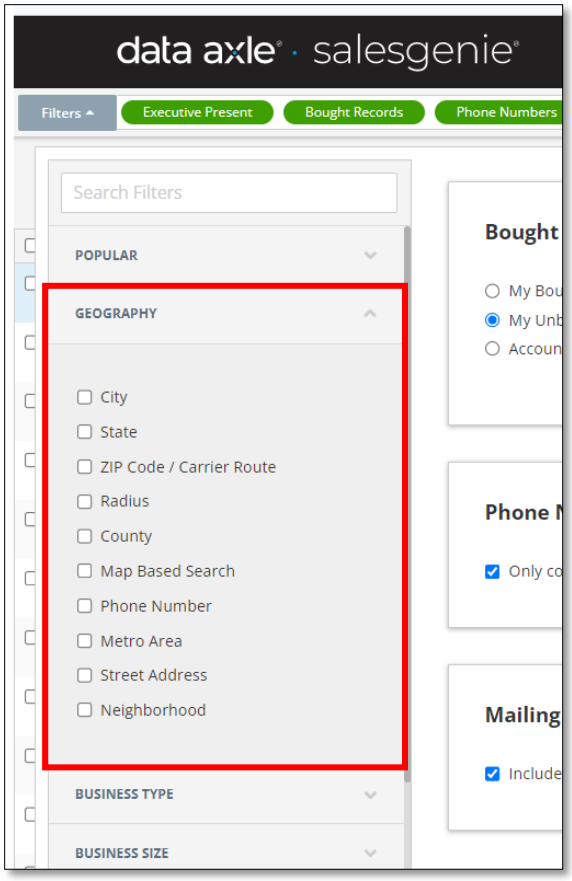
There are four filters already preset according to the CRM system's requirements that need to be left as-is: Executive Present, Bought Records, Phone Numbers, and Mailing Address.

4. The screen that appears will be the Filters options page which has two panels: left shows all the available filters and on the right-side panel is where you would set those specific filters to your needs.

   In this example, we will begin with **GEOGRAPHY** first and then add additional filters if needed (such as: business type, number of employees a business has, industry, years they've been in business and location type.) This will display more specifically targeted businesses based on your prospecting needs.

   If you only want to search based on location (Geography), then skip steps 4 through 6.

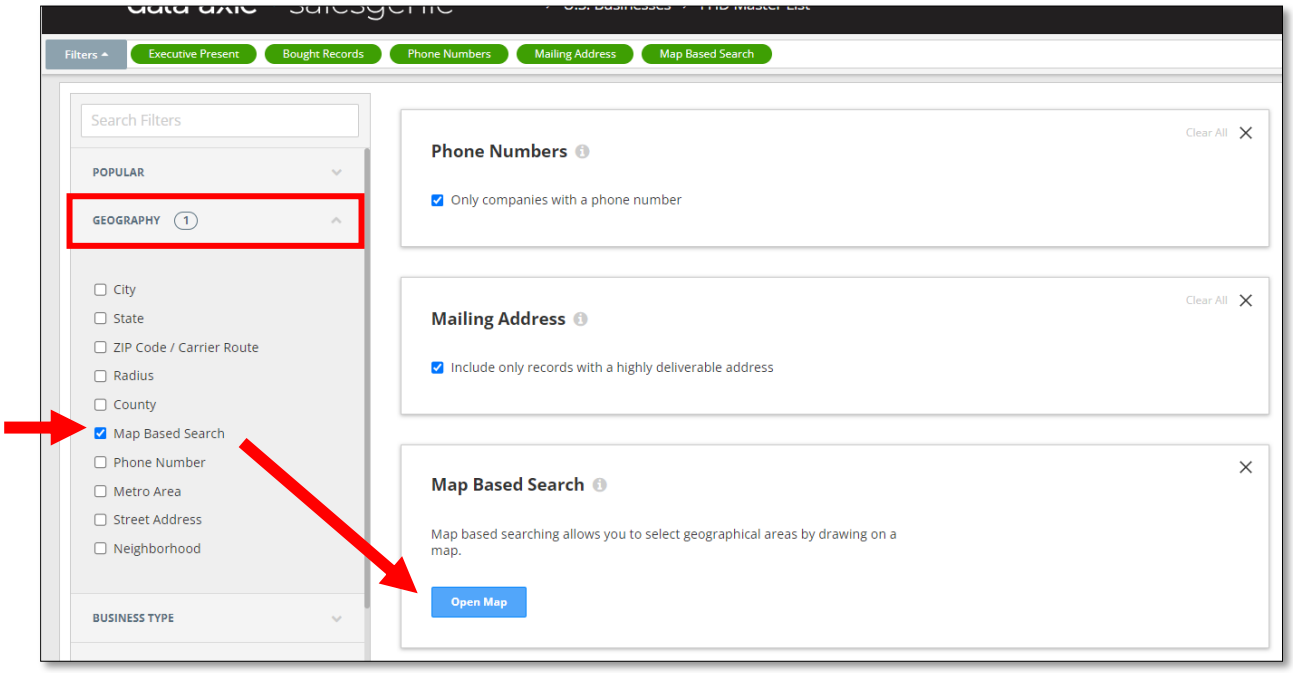
   To search by location, tap on the "**Geography**" filter to expand the options available:



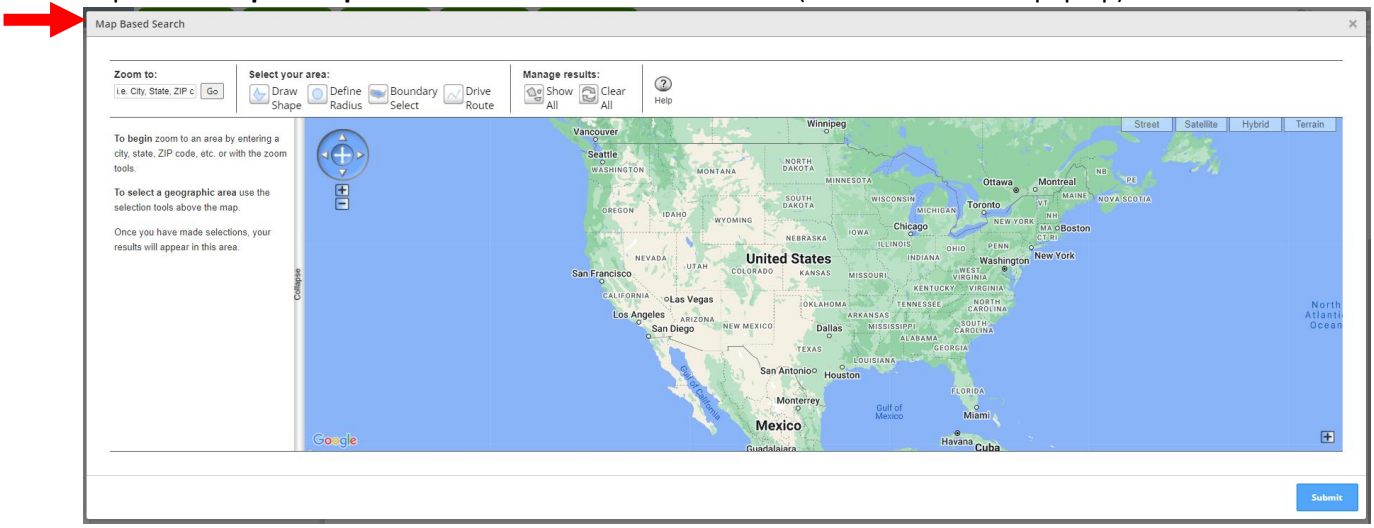
Here you can select the filtering option such as City, State, and County. However, if you are working in a specific zone, like a territory or an area that you have been working tightly (*marry your territory*), then

select the "**Map Based Search**" option to view the prospecting area on a map prior to selecting businesses to export to Salesforce then Mobile Sales App.

Tap the selection under **Geography** category labeled "**Map Based Search**" to select it. It will display on the right-hand side as a filter to be used:



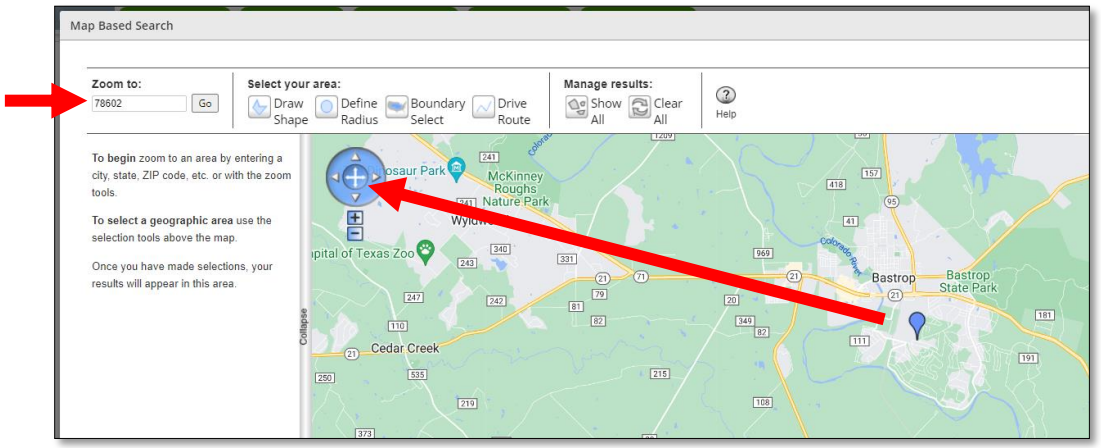
Tap on the "**Open Map**" button to continue into the Search (a new window will pop up):



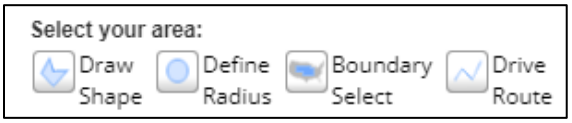
5. Now use the "**Zoom to**:" field to zero in on the territory/area you are working by typing in a City, State, Zip code (something to denote the location desired).

   In this example we are using zip code.

   Then tap the "**Go**" button beside the completed "**Zoom to**" field. The map will automatically move to that designated area. If you need to zoom in closer or move the map around, use the upper right corner Navigator (+, -, up & down):

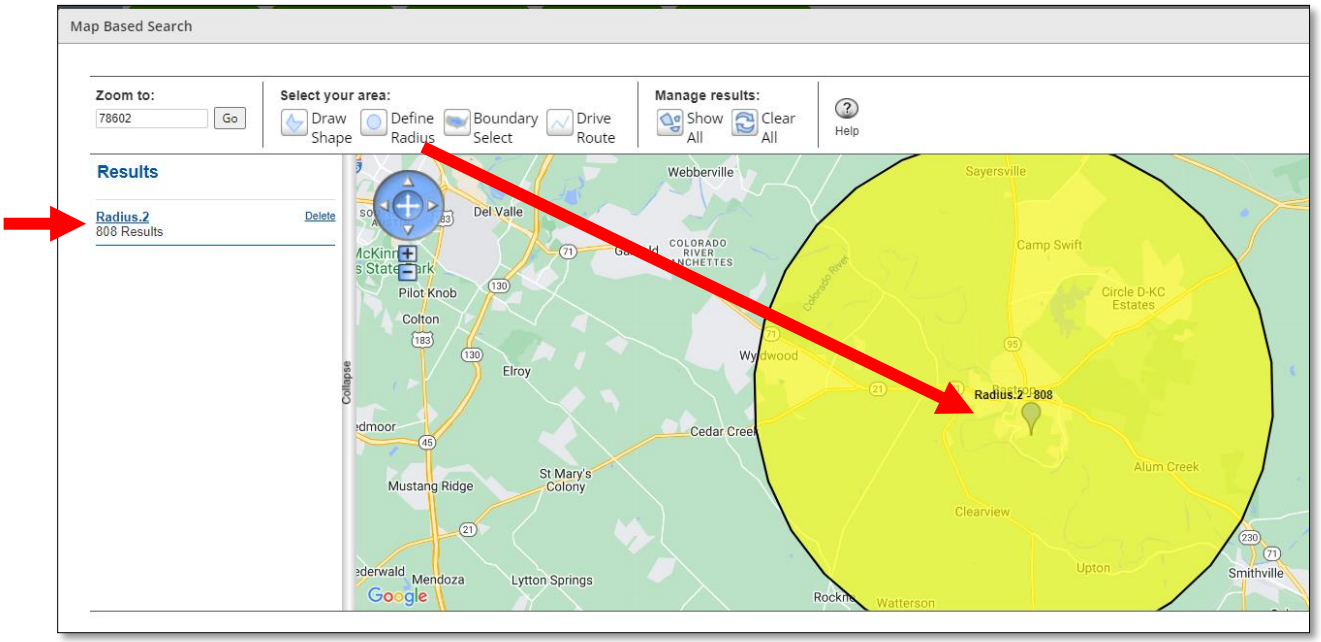


6. Then use the "**Select your area**" section, tap on one of the four options to select that tool:



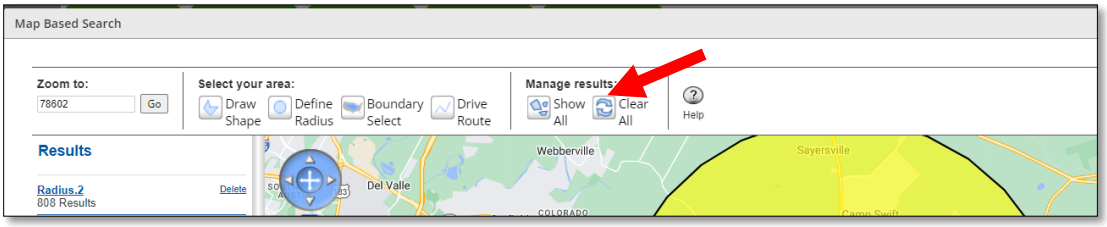
The "**Draw Shape**" option is used by tapping/clicking on the edge of your "territory" or area, then tapping along to create a shape. When shape is as desired, double click or double tap on the final placed dot to end the shape drawing mode. The simplest to use is the ""**Define Radius**" tool. The "**Boundary Select**" option has preset boundaries (shapes) such as zip codes, metro areas, counties, etc. The "**Drive Route**" selection allows a user to designate a "starting" point and an "end" point (for example an address to your first appointment of the day, then last stop at the Office/Home). Click this video to watch how each of those tools are used: https://familyheritagelife-1.wistia.com/medias/dk2bxrppjn

In this example, the **Radius** tool is used. Tap the area of the map, hold, then drag to create a circle radius on the map. When you have selected the designated area, release the hold. A circle shape will display on your map:

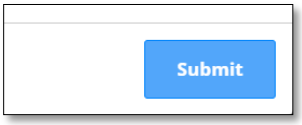


The radius will demonstrate how many businesses are in that area on the left side of the screen as "**Results**". In my example above there are 808 Results. Create as many shapes (radius) as needed. Don't move on to the next step until you see the actual Result count of business in that area.

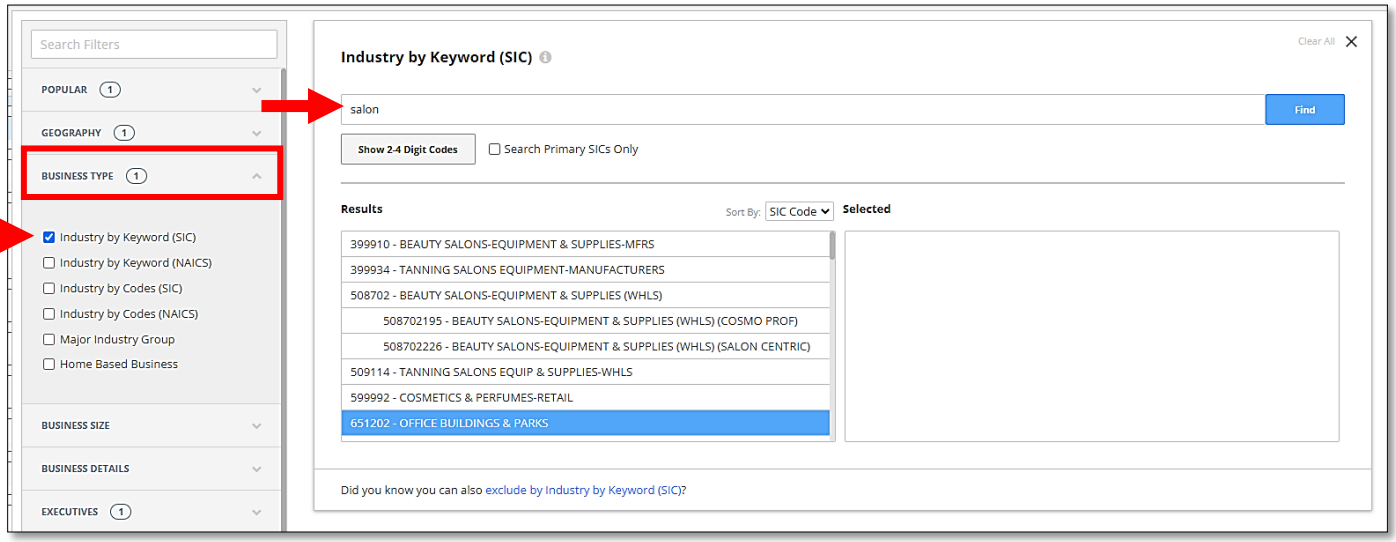
To clear all shapes, use the "**Manage Results**" selection "**Clear All**" then start again:



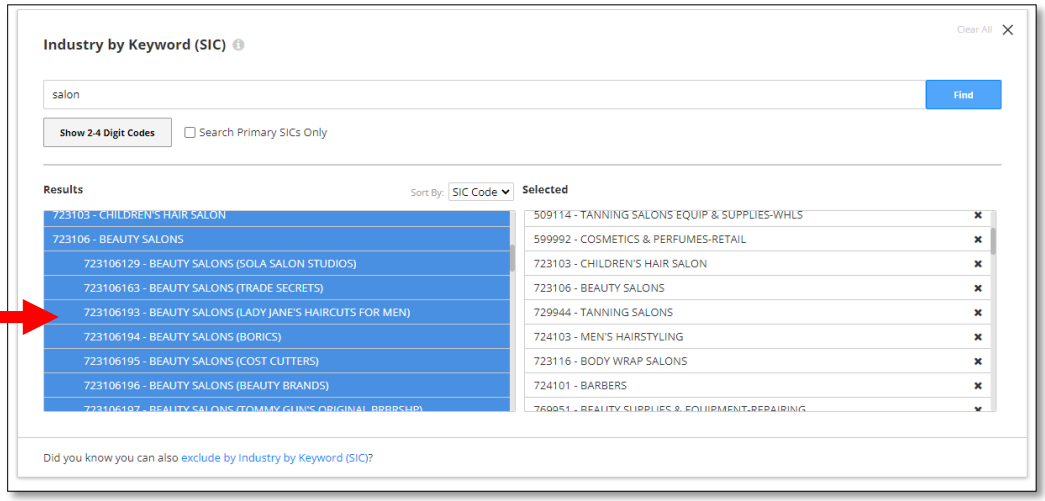
7. Tap "**Submit**" on bottom right to continue (only tap Submit <u>after</u> a count of results are displayed):



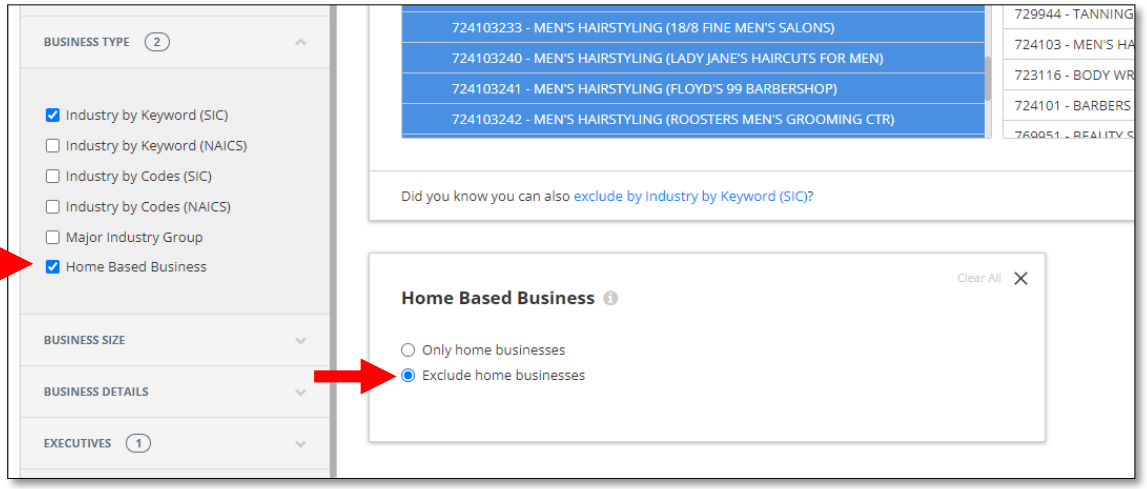
8. *Skip to step #11 to proceed with batch exporting to the CRM system if you are not needing to narrow down your prospect criteria further.* Next, we'll filter by Industry under the "**Business Type"** filter options
    a. By Keyword- Select "**Industry by Keyword (SIC)**" then type in the keyword tied to the industry you're wanting prospects in. Then tap "**Find**" button to display a list in the Results related to that keyword:



Now scroll and select the industries you want search results from, and they will display on the right side under the "Selected" area (the selected options will highlight in blue):



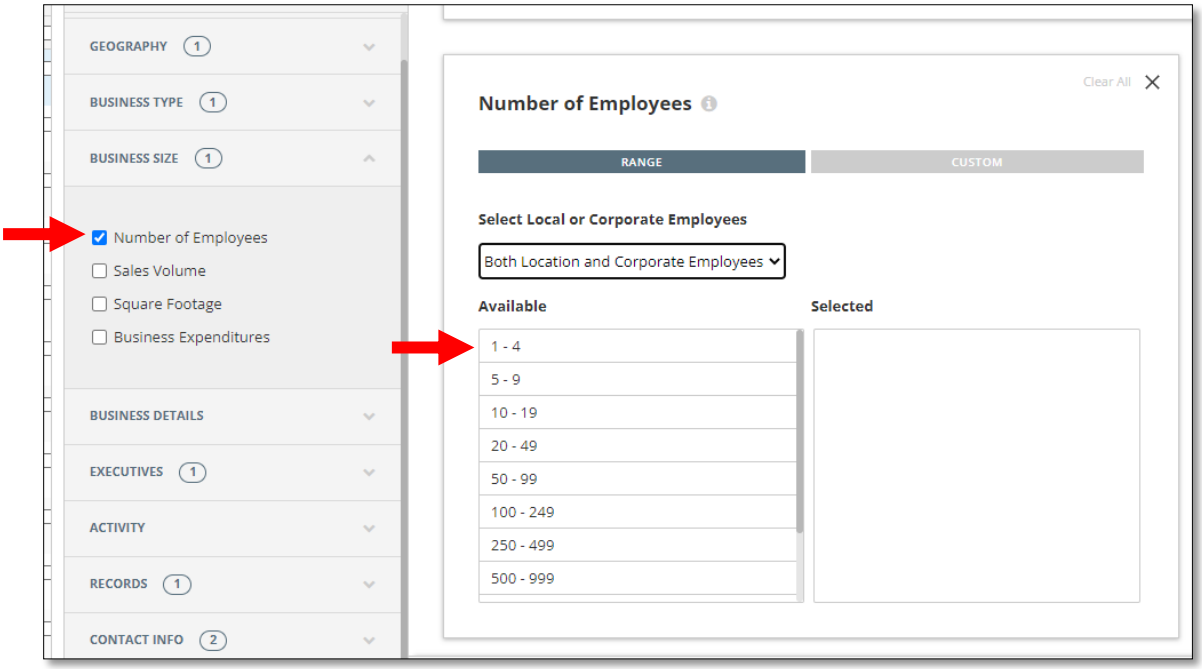
b. Exclude (or ONLY display) Homebased Businesses:



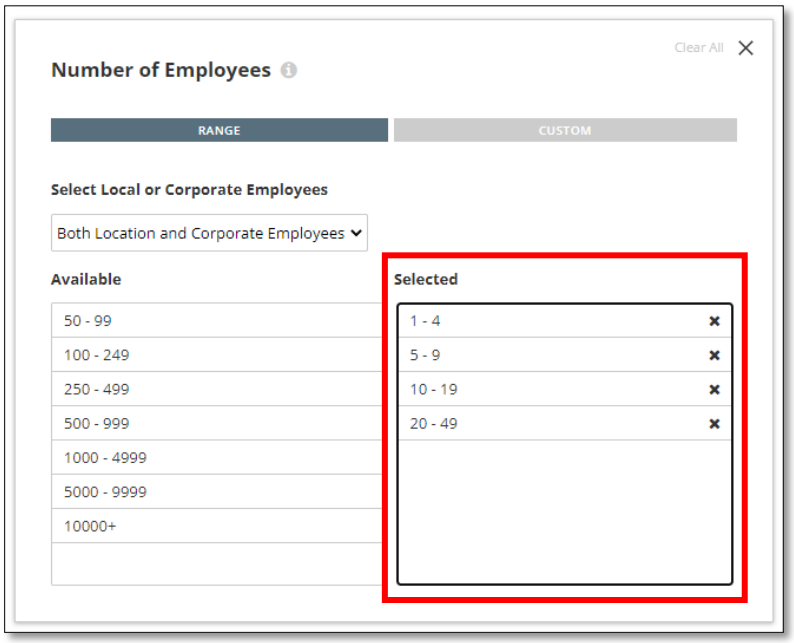
If you work a residential market or a mix of both business and residential, home-based businesses are great to prospect since the odds may be higher that the owner will be home during day light hours.

If you do not select the Filter option for "**Home Based Businesses**" they will be automatically included in your filtered search.

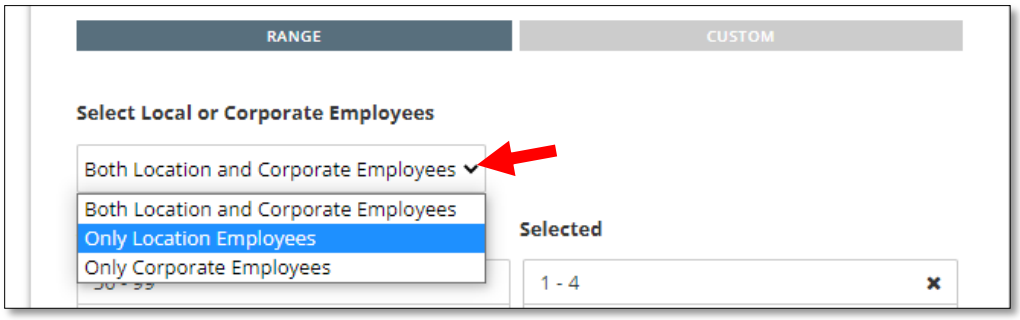
9. Next, filter by "**Business Size**" to search for B2B prospects with specific number of employees:



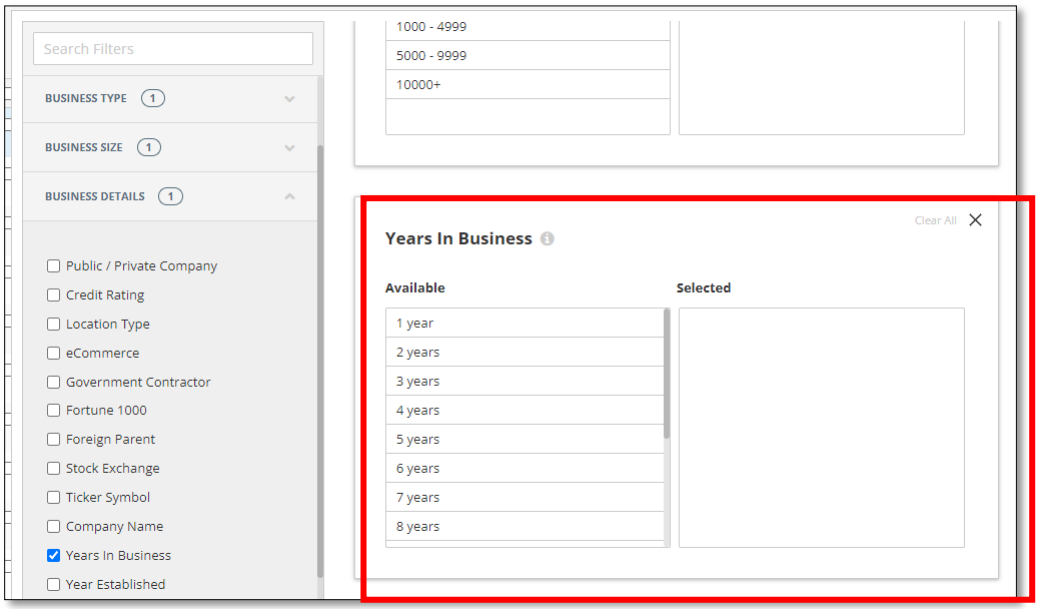
Tapping on a specific range of number of employees in the “Available” column will move the category range to the right into the “Selected” column as a selection for your filtered search:



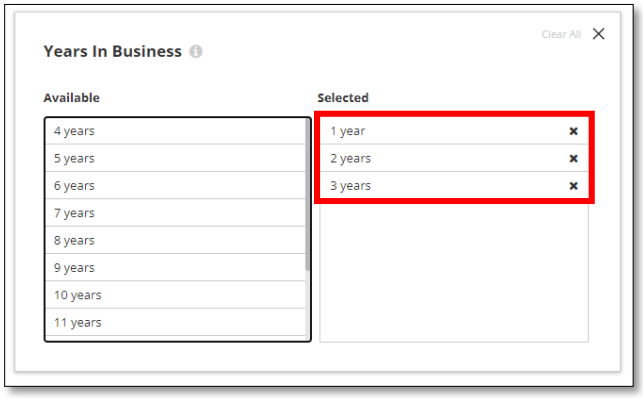
There is also an additional option to include the numbers of the range based on location and/or corporate employees. The default selection will be “both” unless changed:



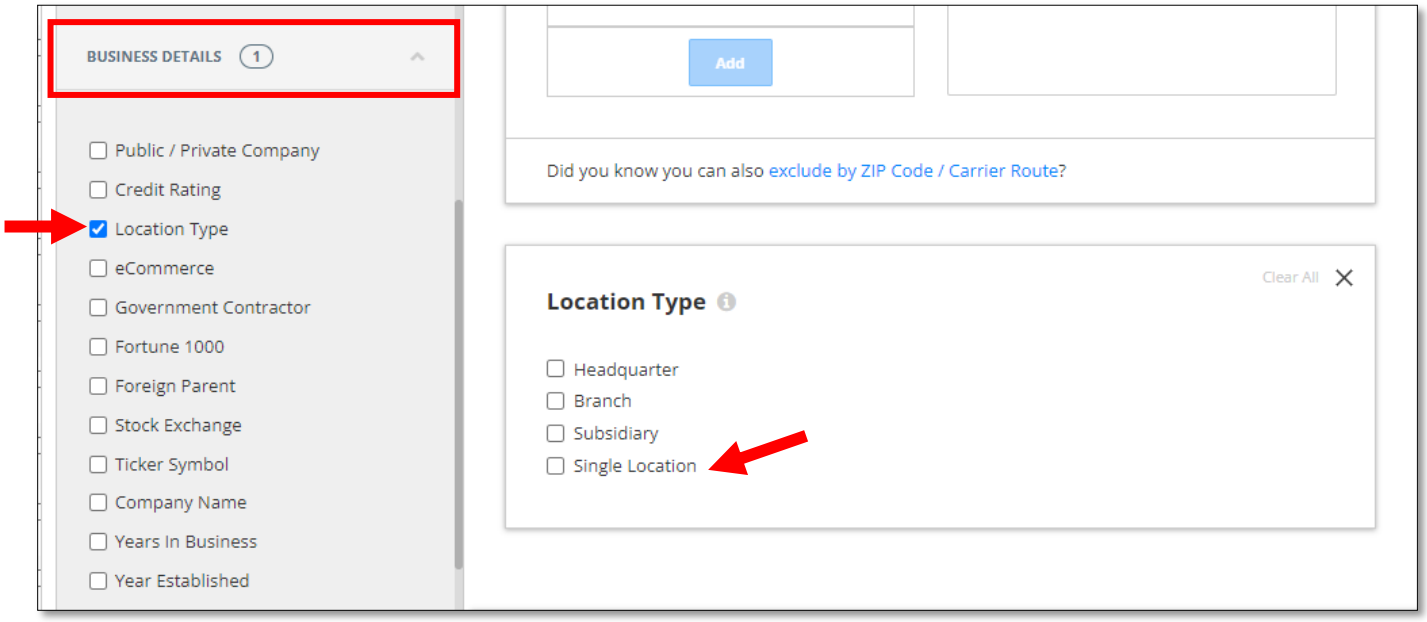
10. Next, we’ll filter by specific Business Details:
    a. **Years in Business:**



If you were wanting to work with businesses that are newer (perhaps businesses that have not set up employee benefits just yet) then just tap to select the years in the "Available" column and they will move to the "Selected" column::



b. **Location Type**- great option to use if you are primarily targeting headquarters or a single location:

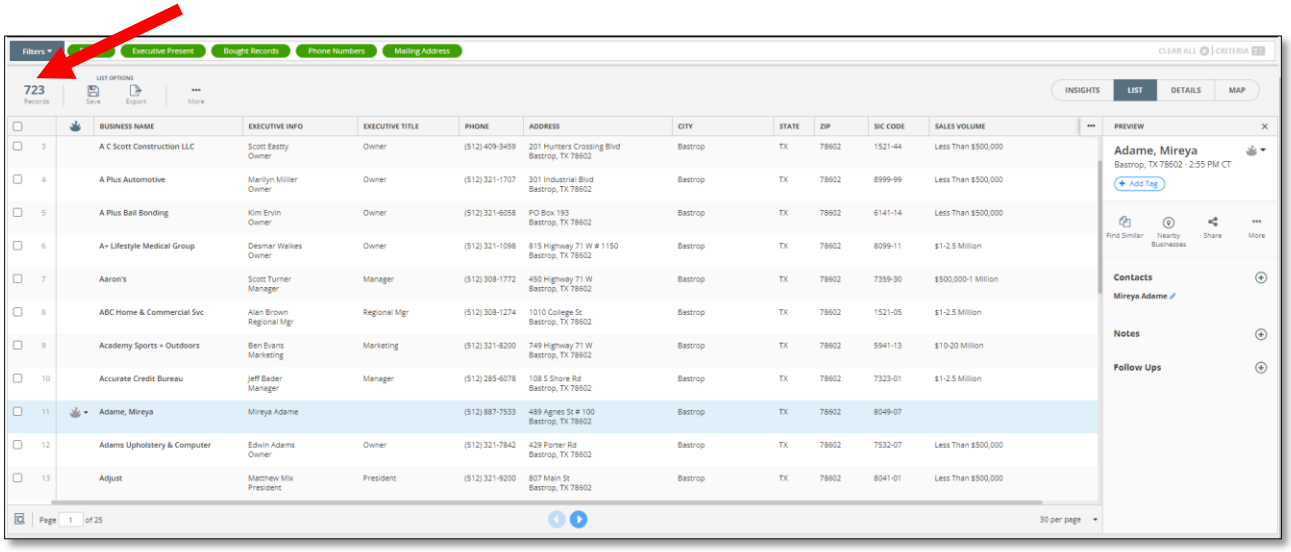


11. As you add in your filters, the count of businesses that fit your criteria will update on the bottom lower left corner of the screen as "**# Records**":

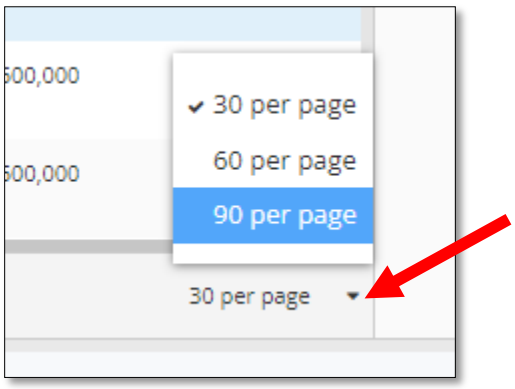
Now you are ready to see your filtered search results. Tap on the lower-right corner "**Run Search**" blue colored button to proceed:

If you do not see the button fully, tap over the area that is visible, and the button will still update the page.

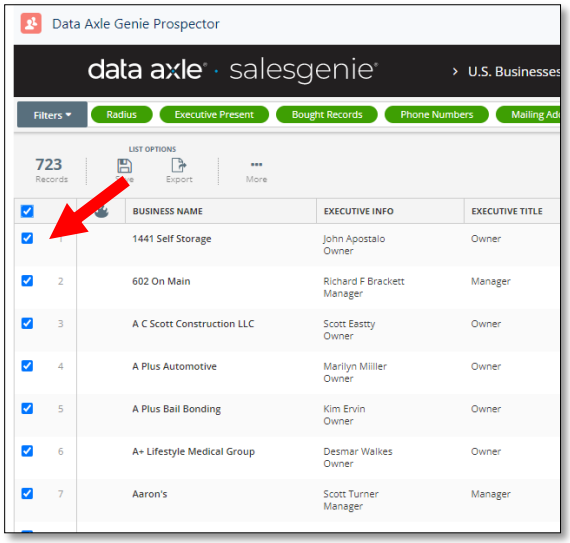
12. The page will return to the FHD Master List, where the record count will now display the updated filtered search records:



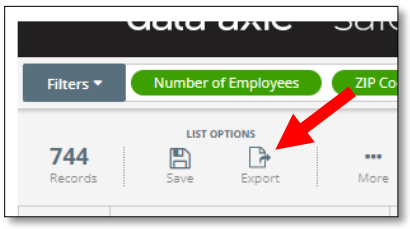
At the lower right corner of the page, you can select to change the # of records to be displayed per page to show more (or less) according to your exporting needs:



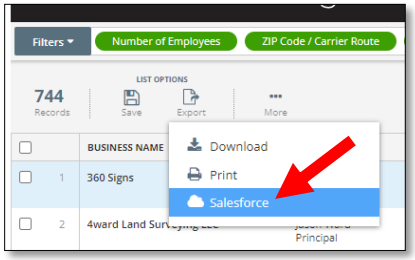
13. Now you can batch select by clicking on the blank box on the far-left side, under the count of records. Checking that box will automatically check all the other boxes below it on the page (i.e. if page is set at 30 records per page it selects all 30, if 90 per page it will select all 90):



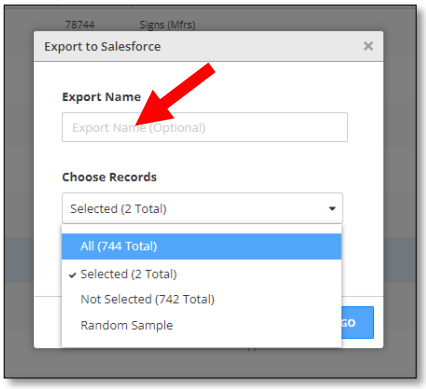
14. With all your selections checked, now you are ready to batch export to the CRM system. At the top right corner, under "**List Options**" tap on "**Export**":



15. Then select "**Salesforce**" to get the prospects out of CRM's Data Axle and directly into the Mobile Sales App (MSA) Leads Management *(From 01/24/2025 onward- Data Axle's B2B Prospects will skip Opportunity creation in Salesforce CRM so that agents don't have to wait to see those as Leads in MSA)*:

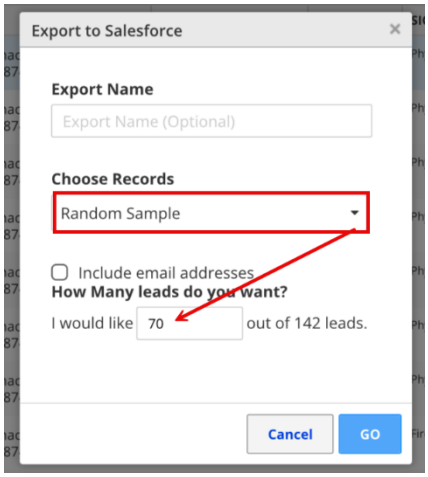


16. A **popup box will display** where you can **name** your Export (i.e. "Salons, Spas, Beauty, Massage – 78744 Turf"):

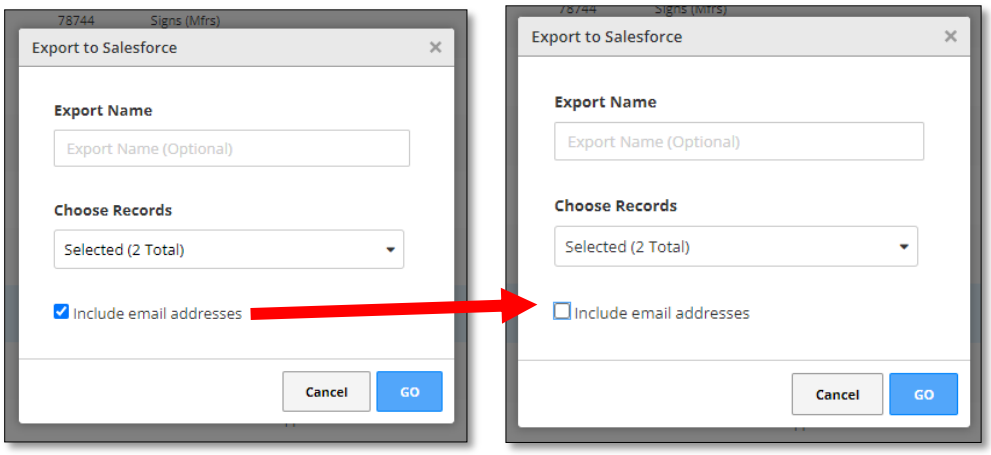


You have the **OPTION** of choosing the amount of businesses to export (1 credit equals 1 Business Record) by editing your choice of records to be exported by tapping on "**Choose Records**" drop down:

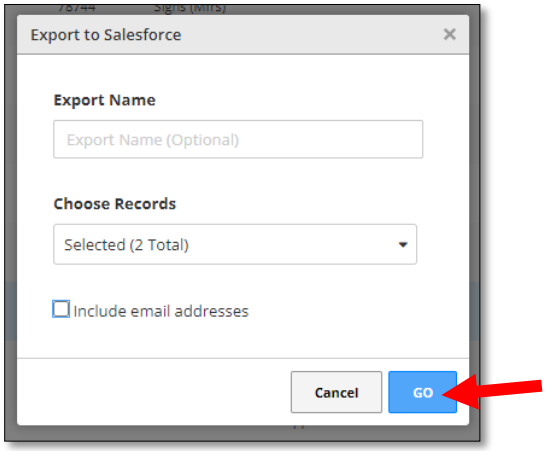
- **All records** (the full filtered list from the previous page), where you can batch select ALL of your list if you have sufficient credits (according to your search record count). So, if you had 500 credits and your filtered list had 480 businesses, you could select "ALL" and all 480 records would be exported.
- **Selected,** will export only the ones you specifically marked on the previous page**.**
- **Not Selected,** whichever business that were not check marked on the previous page
- **Random Sample,** you pick whatever number of credits you want to use and the system will pick at random from your filtered list. So, if you had 500 credits but you had 2,600 Businesses on your filtered list, you could select "500" random records to use your credits.



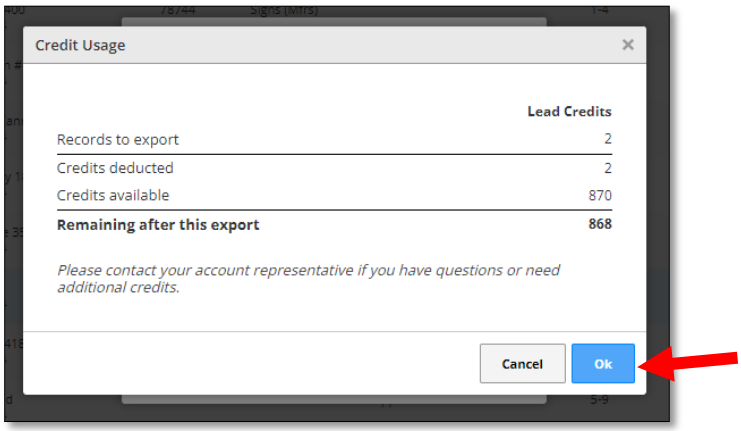
Uncheck "**Include email addresses**" so that the box no longer is blue with a white check mark. Should be blank before continuing:



17. Now tap the blue "**Go**" button to proceed:



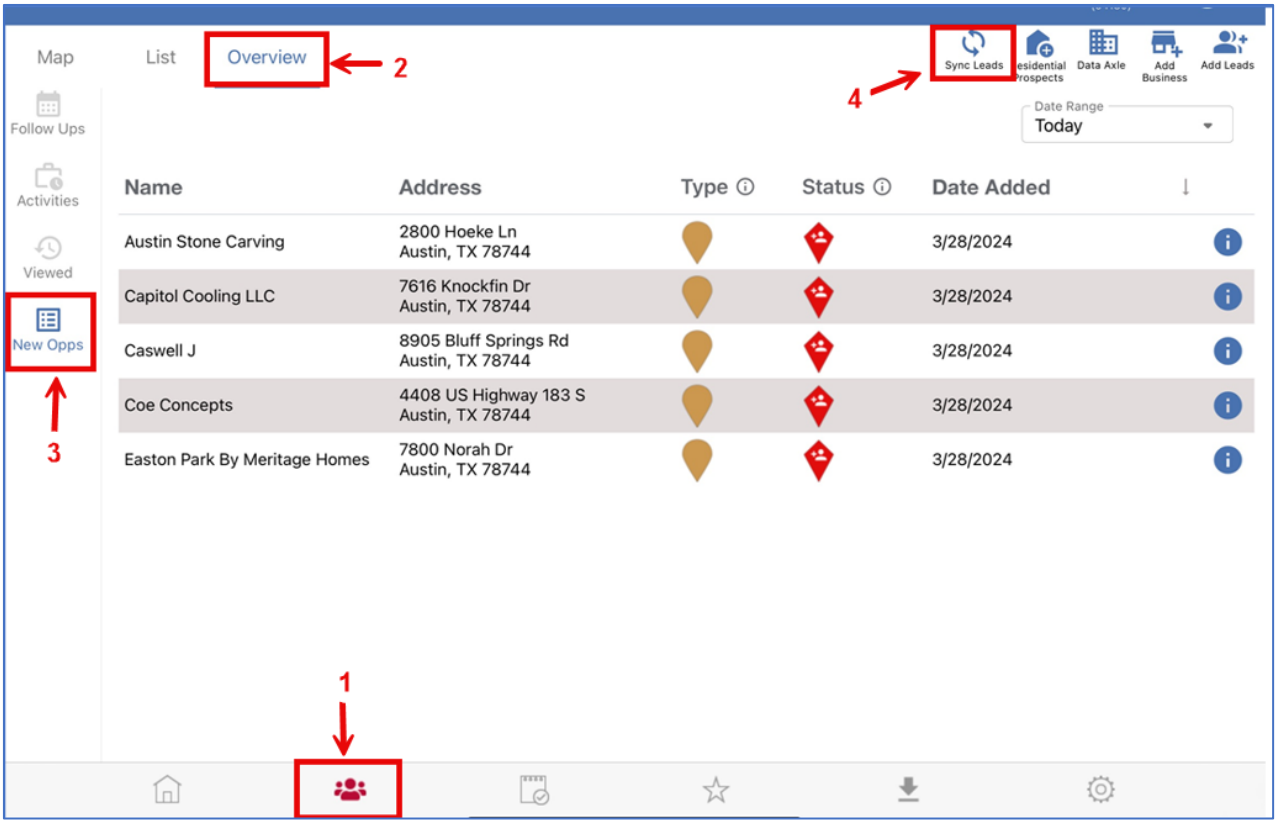
18. The number of credits deducted vs available will display in a new pop-up box. Select "**Ok**" to continue:



Then a final confirmation message will appear validating your prospects are being exported to Mobile Sales App (MSA). Tap a final "**Ok**" to close out the final pop-up box but you're not done yet- continue in MSA.

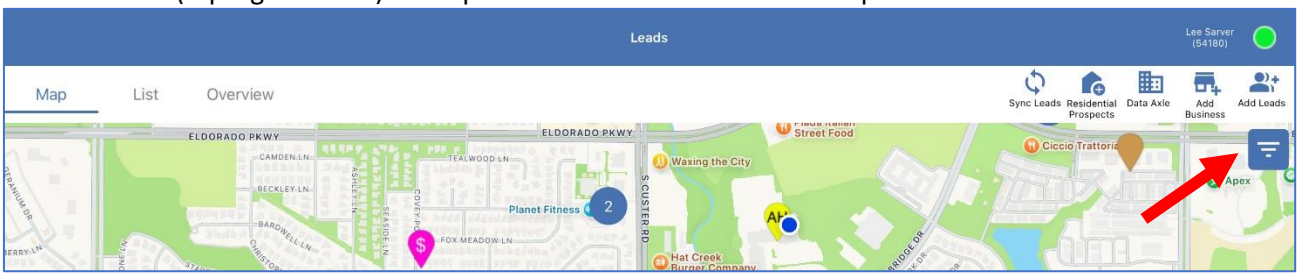
19. Now you have successfully exported your B2B prospects out of the Salesforce CRM system, but you will need to open MSA Leads Management to select "**Sync Leads"** from the Lead pages to complete this process:

In MSA, go to **Leads Management** to Sync Leads (2nd icon on bottom bar), and tap "**Overview**" then select "**New Opps**". Tap "**Sync Leads**" button from this page:



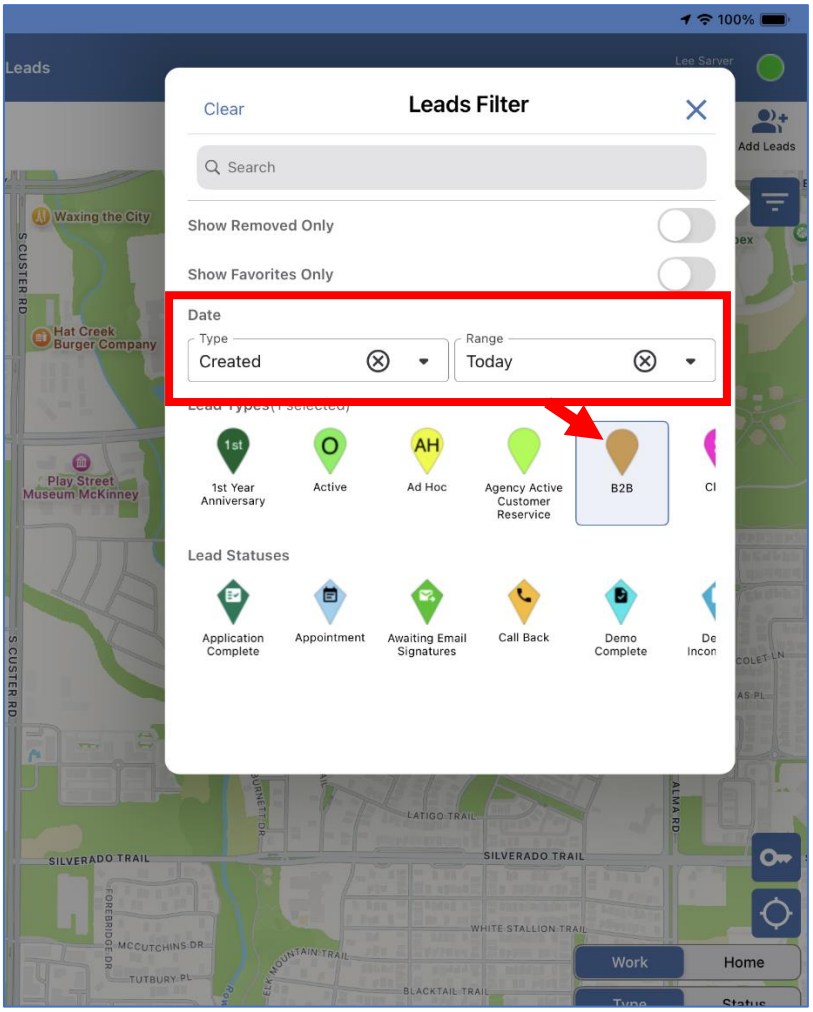
Note that depending on connectivity, agent may need to tap "Sync Leads" more than once if connection is not stable. Be sure to be online when syncing leads, otherwise Pins will update upon next connected sync.

To view these Leads in your Leads Map or Leads List instead of just from Overview, go to **List/Map**, click on the **Filter** icon (top-right corner). Example of where to click on Leads Map:



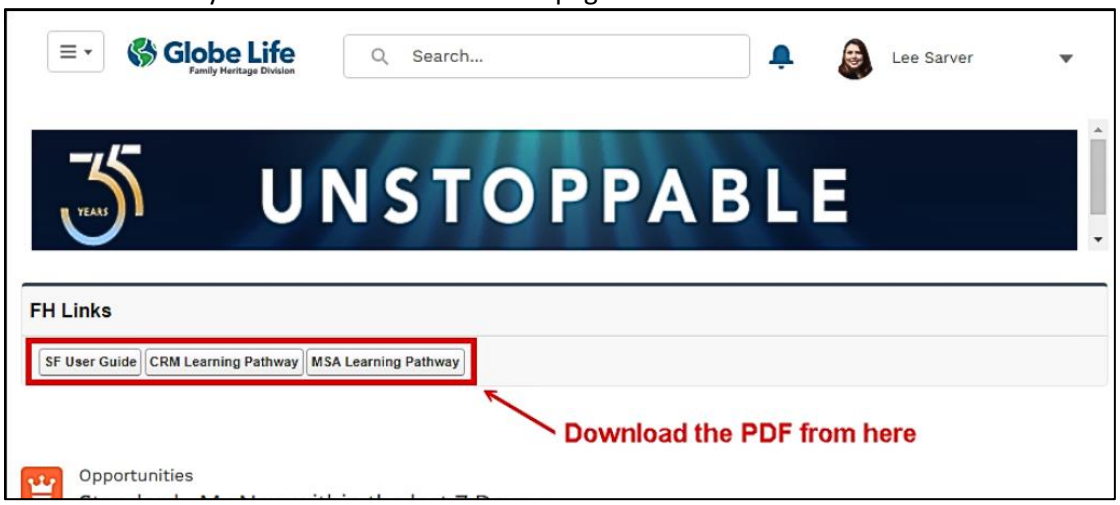
Example on where to click to view the Filter on the Leads List:

Then select the "**B2B**" Lead Type and set the **Date** "**Type/Range**" dropdowns as "**Created**" and "**Today**" (or use This Week, Custom Date, etc.):



Now those B2B Prospects will display as Pins on the Map or in the Leads List (until user clears Filter).

Be sure to check out Learning Pathways to explore more Leads Management features in the Mobile Sales App. Download directly from Salesforce CRM Homepage:



Report any issues with B2B Prospects within Salesforce using Cases from the Navigation menu:
https://familyheritagelife-1.wistia.com/medias/p78pzs5vxt