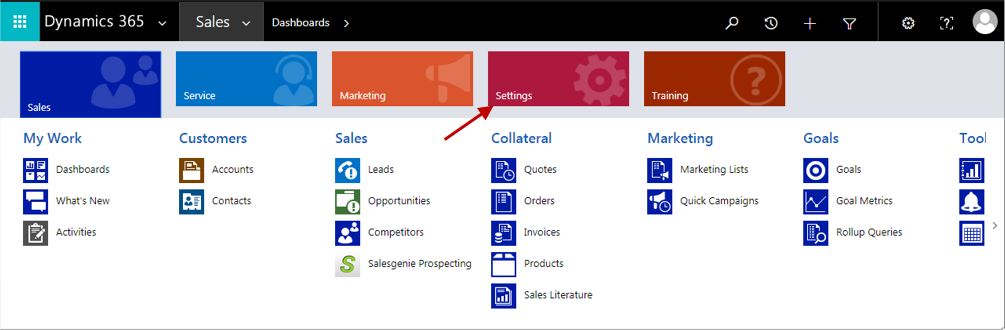
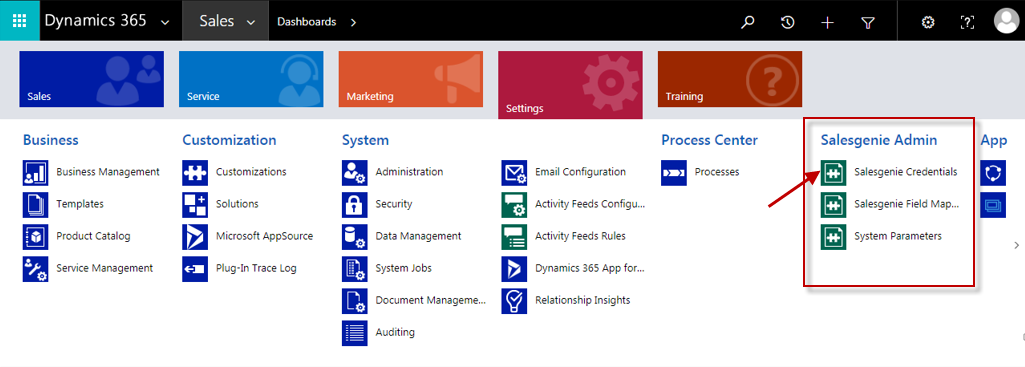
**Dynamics user script**

Setting up your Salesgenie account in Dynamics is easy; just follow to these simple steps.

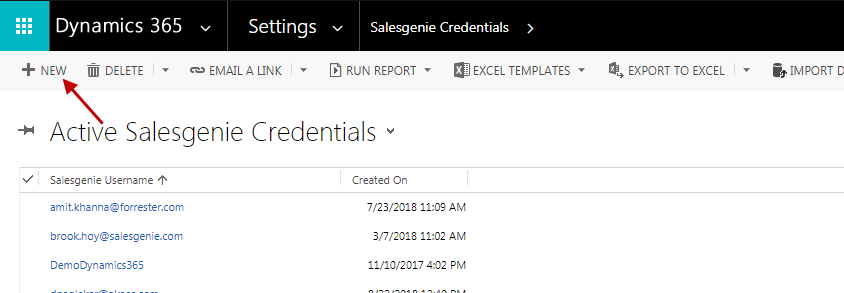
**Step 1**

* Click “Settings”

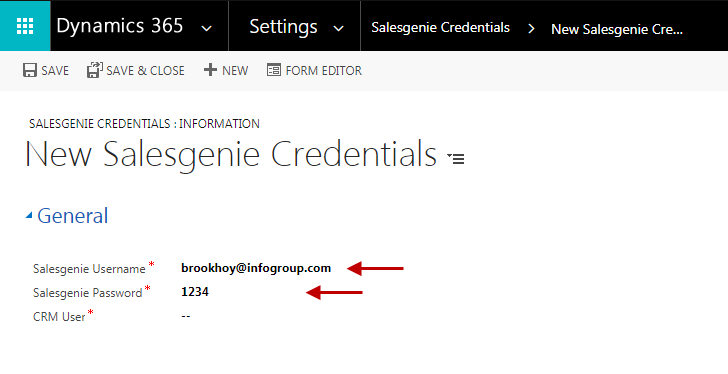
**Step 2**

* Then click “Salesgenie Credentials”

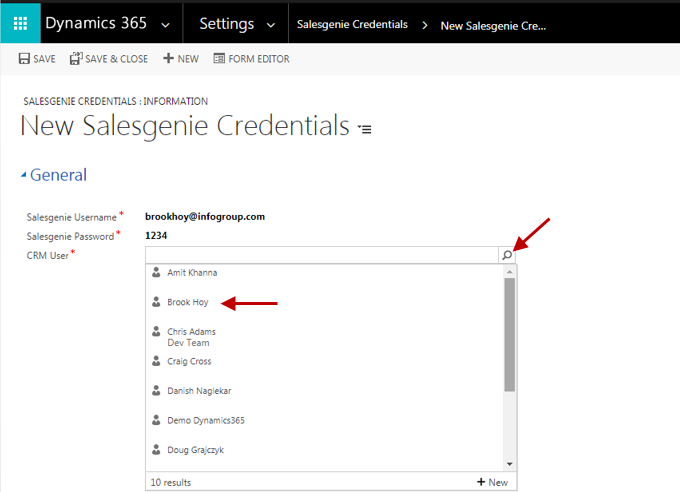
**Step 3**

* Then click “New”  
  

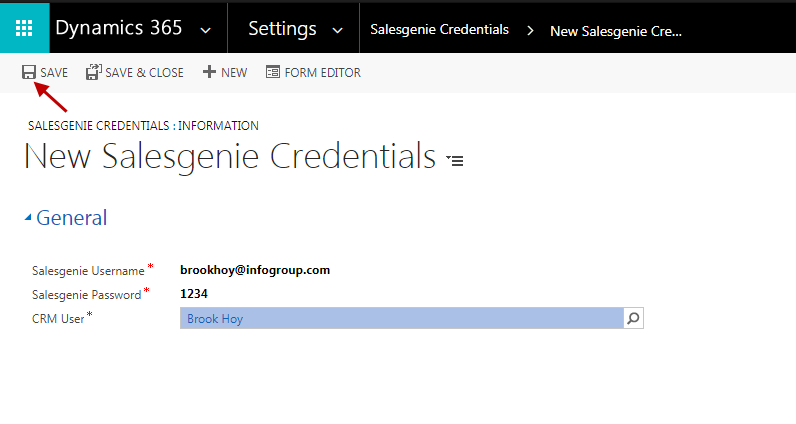
**Step 4**

* Enter your Salesgenie username and password  
  

**Step 5**

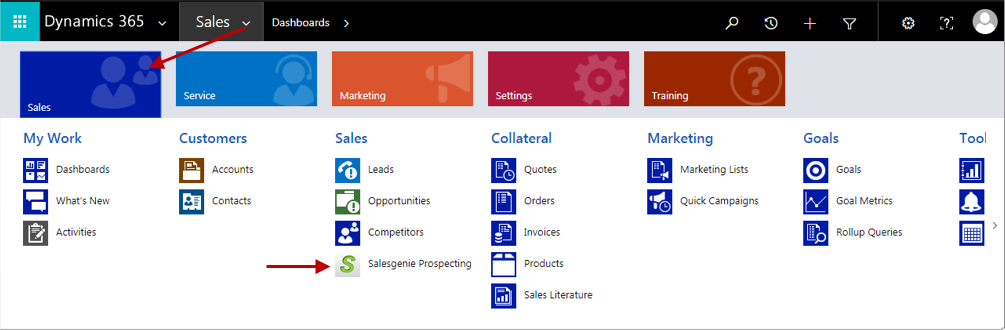
* Assign your CRM username  
  

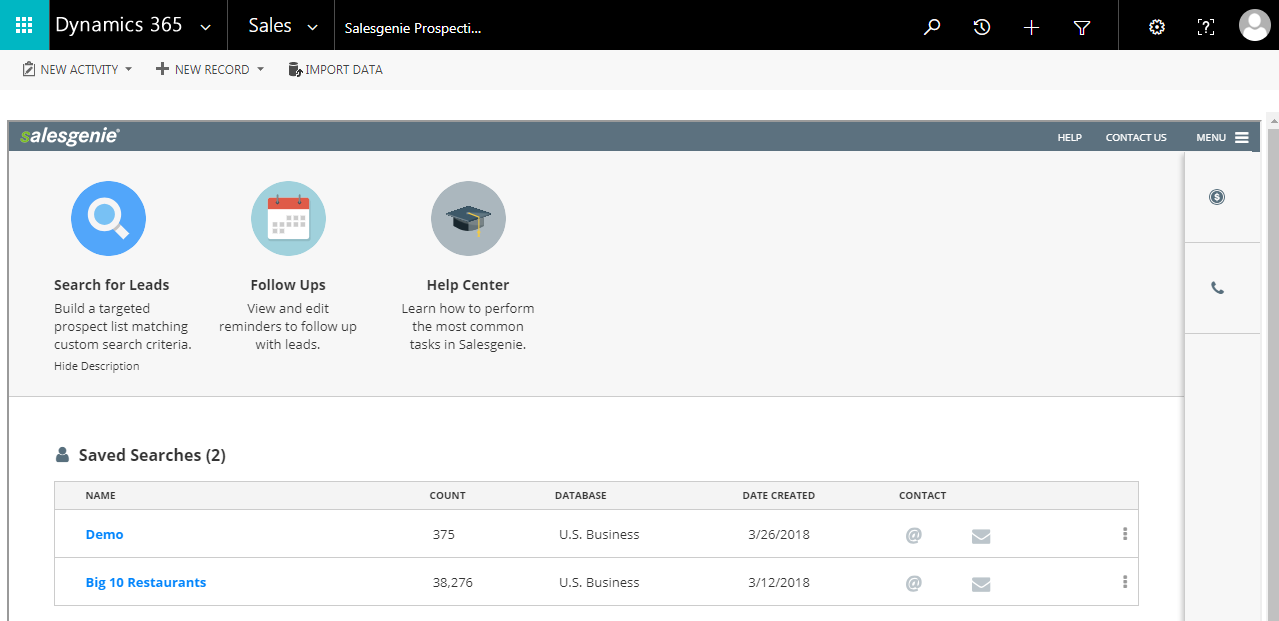
**Step 6**

* Click “Save”  
  

**How to use SG within Dynamics**

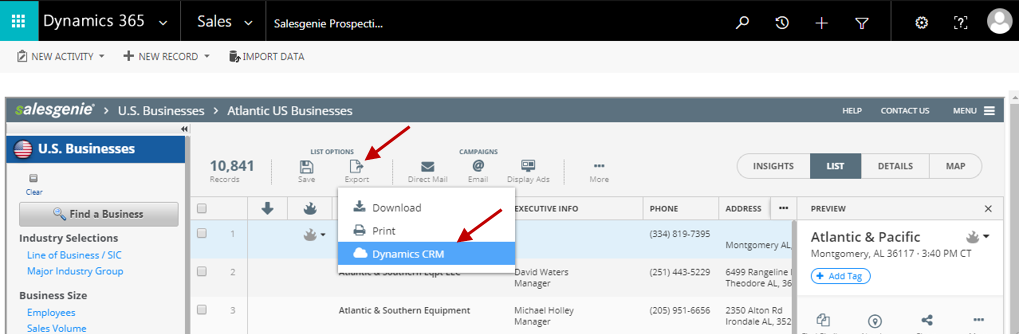
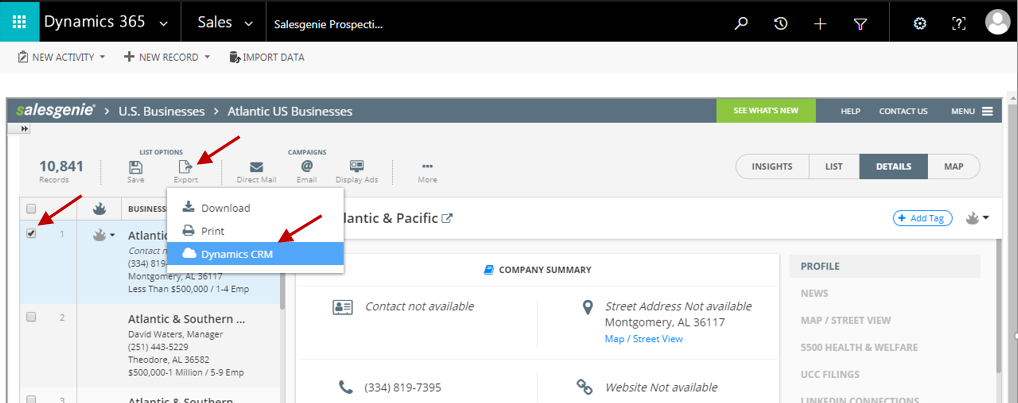
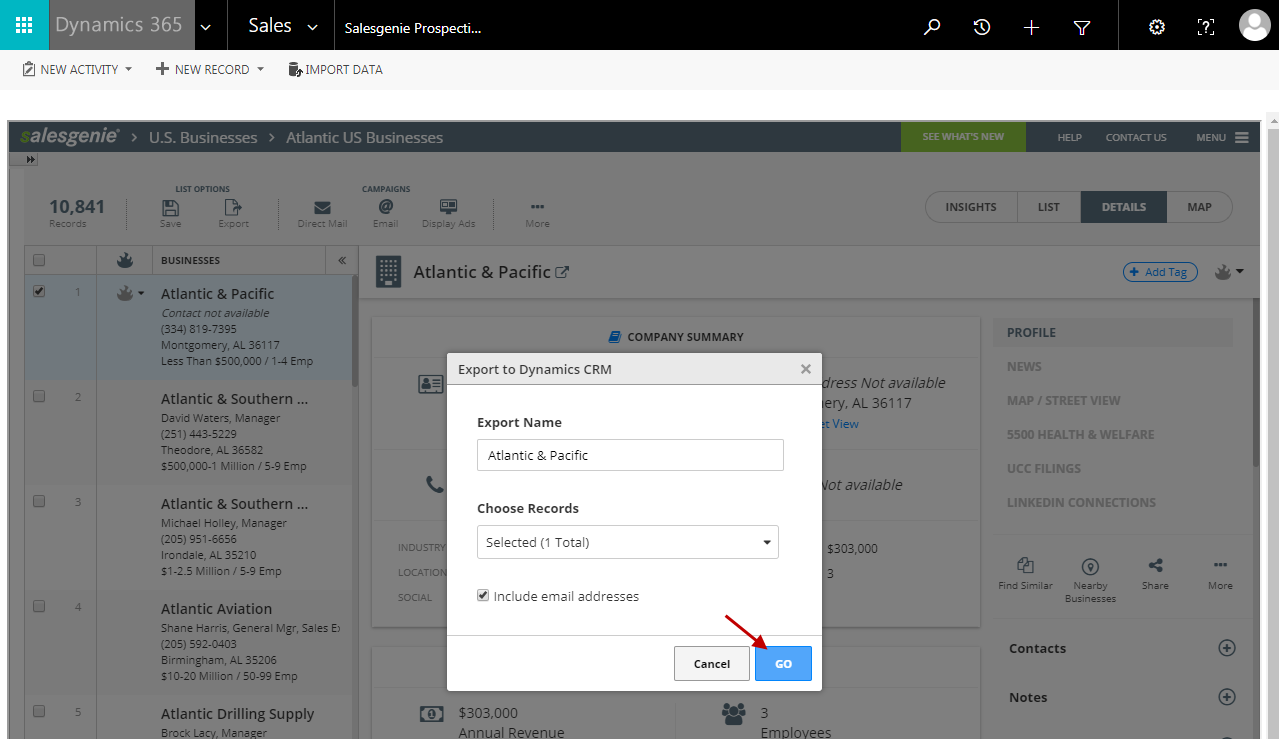
* Now to access Salesgenie just click your Sales tab and look for the Salesgenie Prospecting icon under the Sales section.
* This will get you access to Salesgenie.

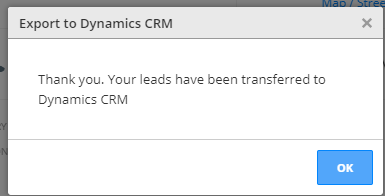




**Exporting records**

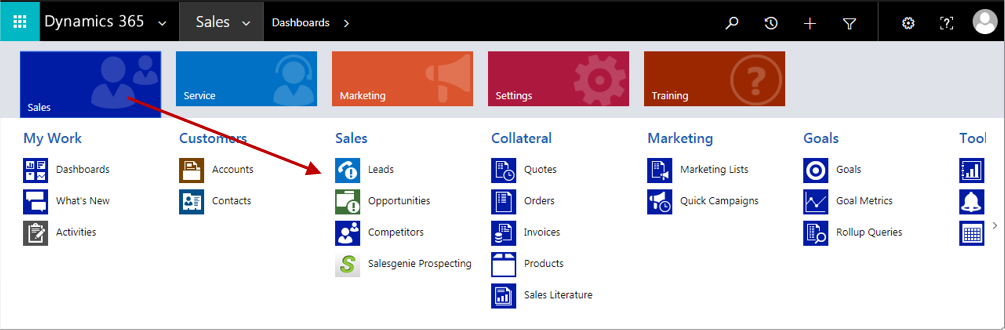
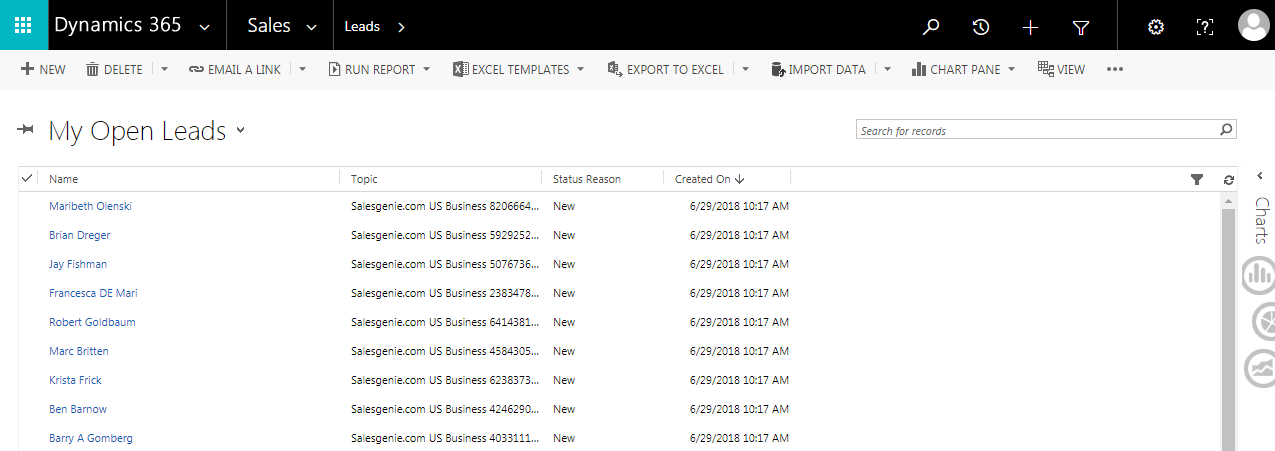
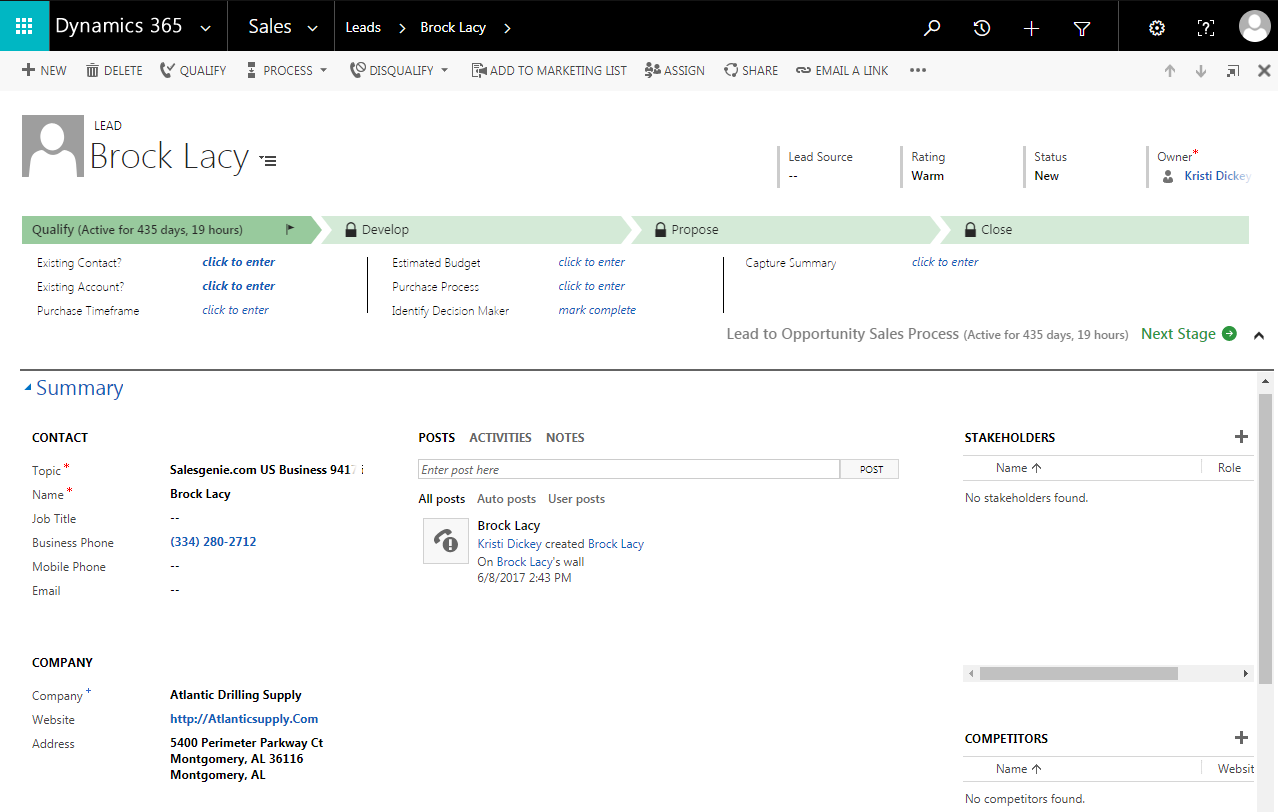
* To export leads into Dynamics look for the available export options
* Once you’re ready to export just select the “Export to Dynamics CRM” option
* You can export one or multiple leads at a time

  
|  




**Salesgenie leads in Dynamics**

* Your Salesgenie leads can be found by selecting the Leads icon under the Sales section

**Salesgenie mobile app**

* And don’t forget you can export leads from your Salesgenie mobile app to Dynamics too  
   