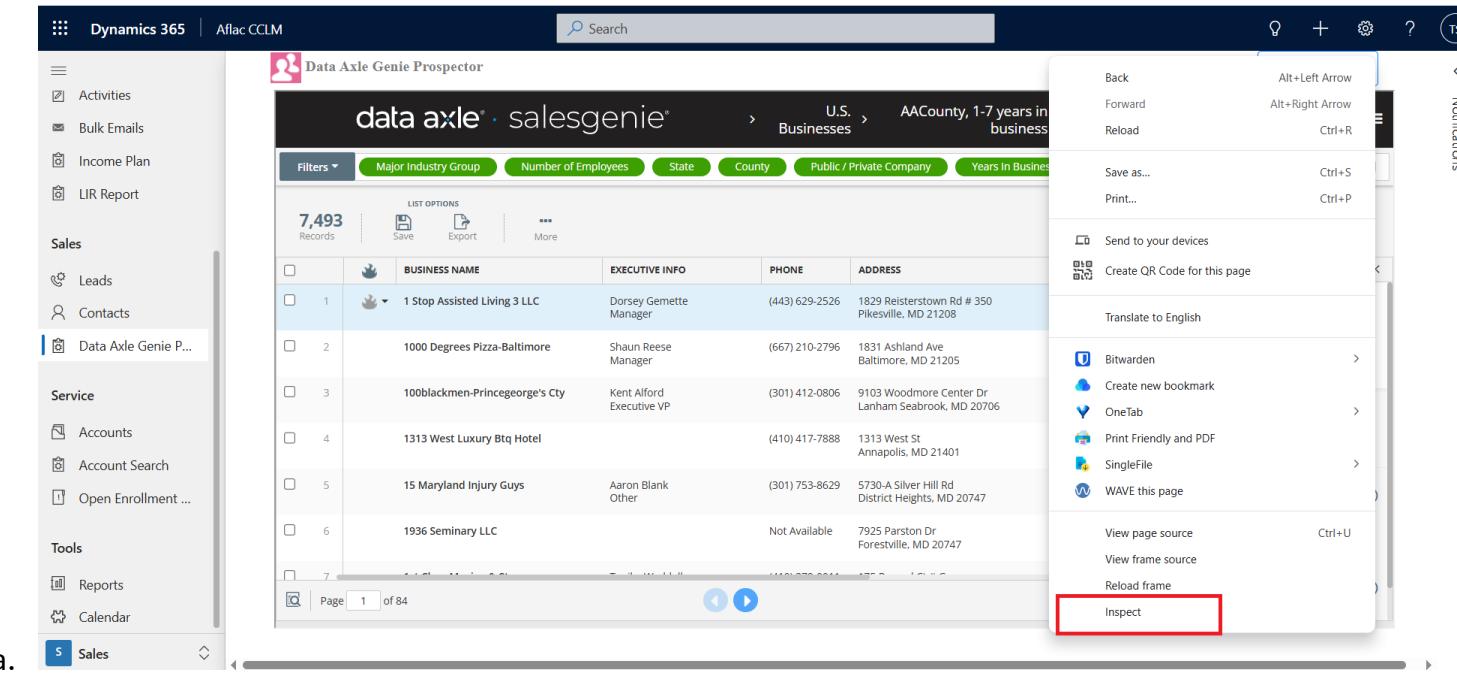


Data extraction from Aflac Leads

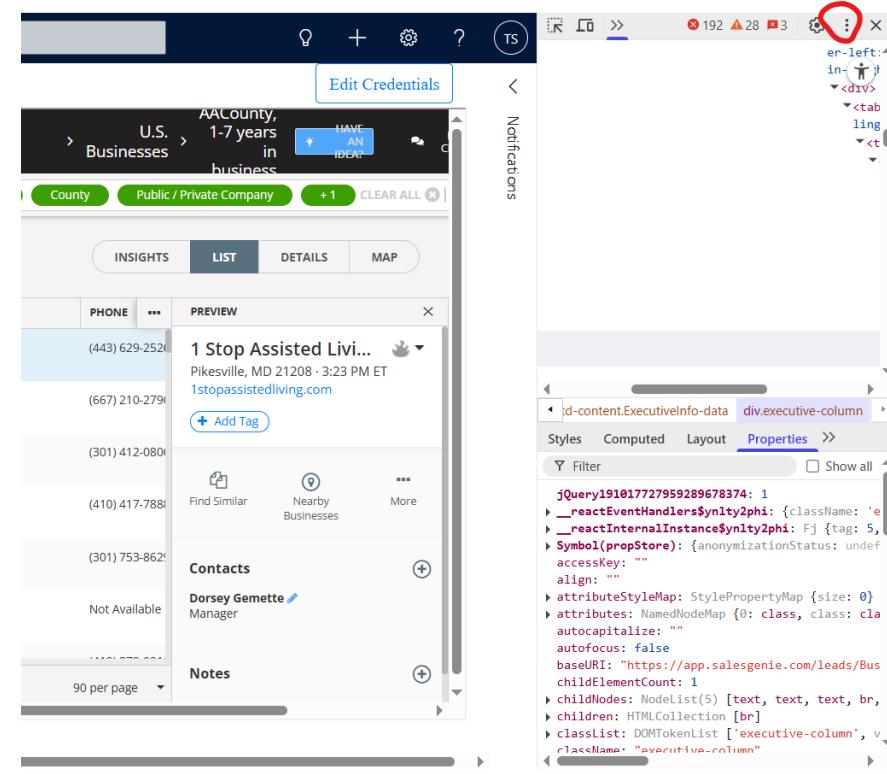
1. Load search you want and scroll to the second page

The screenshot shows the Dynamics 365 Data Axe Genie Prospector interface. The left sidebar includes sections for Activities, Bulk Emails, Income Plan, LIR Report, Sales (Leads, Contacts), Service (Accounts, Account Search, Open Enrollment ...), Tools (Reports, Calendar), and a Sales dropdown. The main area displays a list of 7,493 records. The columns include BUSINESS NAME, EXECUTIVE INFO, PHONE, ADDRESS, CITY, and PREVIEW. The preview for the first few entries is visible. At the bottom of the list, there are navigation arrows labeled 'Page 2 of 84'. A red circle highlights the right arrow, indicating where to click to scroll to the next page.

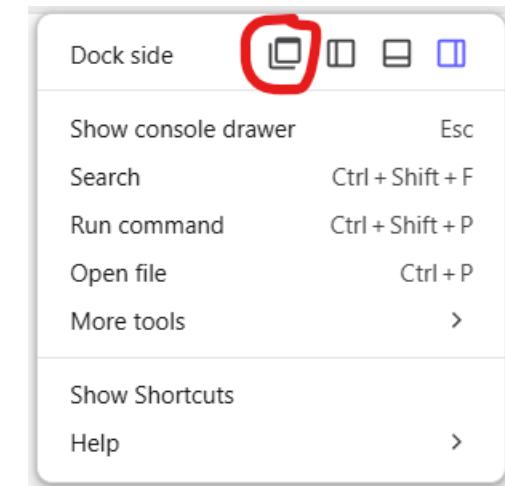
2. Right click on the page and select “Inspect”



3. Click on the 3 dot hamburger menu

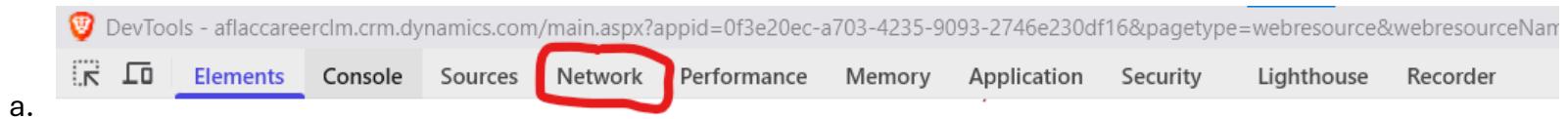


4. Where it says “Dock side” select “Undock into separate window”



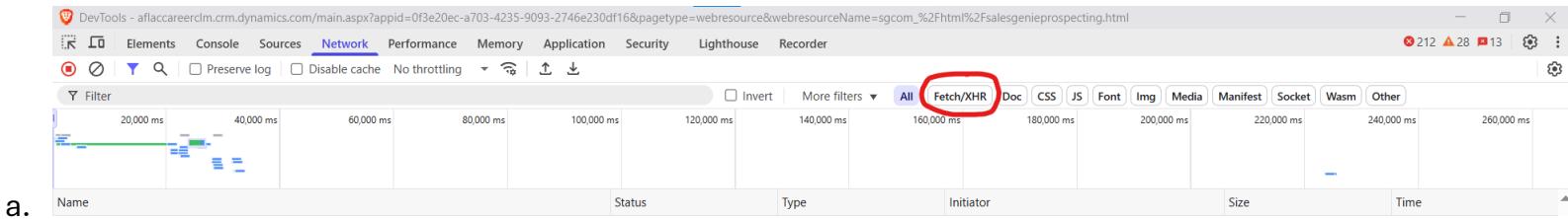
a.

5. On the top menu select “Network”

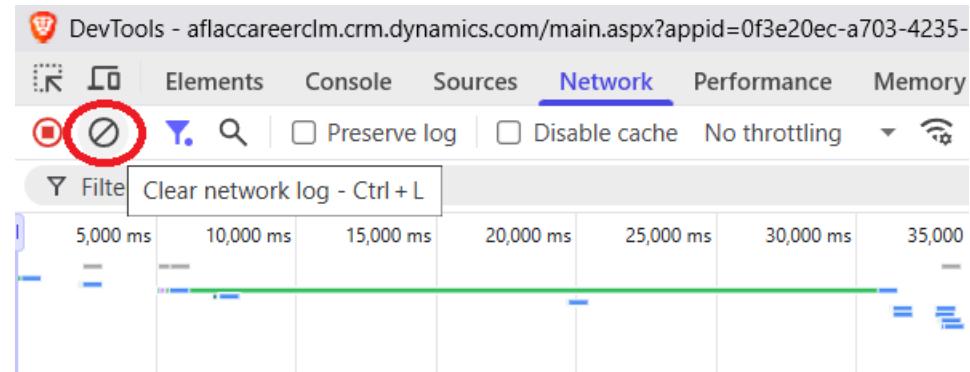


a.

6. Next, select “Fetch/XHR”



7. Clear the network log



a.

8. Return to the Leads Results page and click back to Page 1

a.

The screenshot shows the Dynamics 365 Leads Results page. The left sidebar includes sections for Activities, Bulk Emails, Income Plan, LIR Report, Sales (Leads selected), Service, Tools, Reports, and Calendar. The main area displays a list of 7,493 records with columns for BUSINESS NAME, EXECUTIVE INFO, PHONE, ADDRESS, CITY, and more. A red circle highlights the left arrow navigation button at the bottom center of the page. The right side of the screen shows a preview of the first record, contact details, and notes.

Record #	BUSINESS NAME	EXECUTIVE INFO	PHONE	ADDRESS	CITY
91	Anne Arundel Co-City-Annapolis	Paul Bowling Manager	Not Available	PO Box 6328 Annapolis, MD 21401	Annapolis
92	Anne Arundel County Bd Educatn	Mark Bedell Manager	(410) 222-5000	2644 Riva Rd Annapolis, MD 21401	Annapolis
93	Anne Arundel County Chamber			1910 Towne Centre Blvd # 250 Annapolis, MD 21401	Annapolis
94	Anne Arundel County Pubc	Jerold K Nussbaum Manager	Not Available	5 Harry S Truman Pkwy Annapolis, MD 21401	Annapolis
95	Anne Arundel Diagnostics		(443) 481-5660	2000 Medical Pkwy # 202 Annapolis, MD 21401	Annapolis
96	Anne Arundel Med Group	Peter Odenwald Vice President	(410) 897-0822	888 Bestgate Rd # 208 Annapolis, MD 21401	Annapolis
97					

9. Click back to the developer console and find the file titled “request/”.

The file should be about 160KB and take 1-3 seconds to load

Name	Status	Type	Initiator	Size	Time
recording?rt=5&rst=1756151400244&let=1756151536634...4397171821008865&hpvid=5199866...	200	xhr	8cc31924-7901-4278-b58d-a4fe7580277:4	0.2 kB	116 ms
recording?rt=2&hpivid=1711079724&hpvid=77416274029...u=2b016f20-15c4-a3f3-8aa7-76dd5...	CORS error	xhr	8cc31924-7901-4278-b58d-a4fe7580277:4	0.0 kB	112 ms
1.0/?cors=true&content-type=application/x-json-stream&w=2	200	xhr	es6.standalone-apphost.js:290	0.1 kB	172 ms
r.gif?MonitorID=d3658&rid=d8d333c78d9d8715b7465fb...Conn%22%22warm%22,%22Result%22...	200	xhr	app.0aeef7..js:28	0.2 kB	112 ms
1.0.0.0?ObjectID=a4f5c04b-8f10-41c6-a6ca-51d717fc...ayer&EmbeddingHost=Embedded&ServerL...	304	xhr	es6.apphost-runtime.js:16	0.3 kB	90 ms
1.0.0.0?ObjectID=a4f5c04b-8f10-41c6-a6ca-51d717fc...ayer&EmbeddingHost=Embedded&ServerL...	304	xhr	es6.apphost-runtime.js:16	0.1 kB	168 ms
1.0/?cors=true&content-type=application/x-json-stream&w=2	200	xhr	es6.standalone-apphost.js:290	0.1 kB	184 ms
request/	200	fetch	b9ff786afe086.js:7	160 kB	2.48 s
track	200	fetch	b9ff786afe086.js:7	0.3 kB	46 ms
track	200	fetch	b9ff786afe086.js:7	0.3 kB	82 ms
recording?rt=5&rst=1756151400244&let=1756151581945...397171821008865&hpvid=5199866...	200	xhr	8cc31924-7901-4278-b58d-a4fe7580277:4	0.2 kB	63 ms
recording?rt=2&hpivid=1711079724&hpvid=77416274029...u=2b016f20-15c4-a3f3-8aa7-76dd5...	CORS error	xhr	8cc31924-7901-4278-b58d-a4fe7580277:4	0.0 kB	196 ms
recording?rt=5&rst=1756151581994&let=1756151581997...=4397171821008865&hpvid=668263...	200	xhr	8cc31924-7901-4278-b58d-a4fe7580277:4	0.0 kB	75 ms
recording?rt=5&rst=1756151581994&let=175615158208...=4397171821008865&hpvid=668263...	200	xhr	8cc31924-7901-4278-b58d-a4fe7580277:4	0.0 kB	49 ms

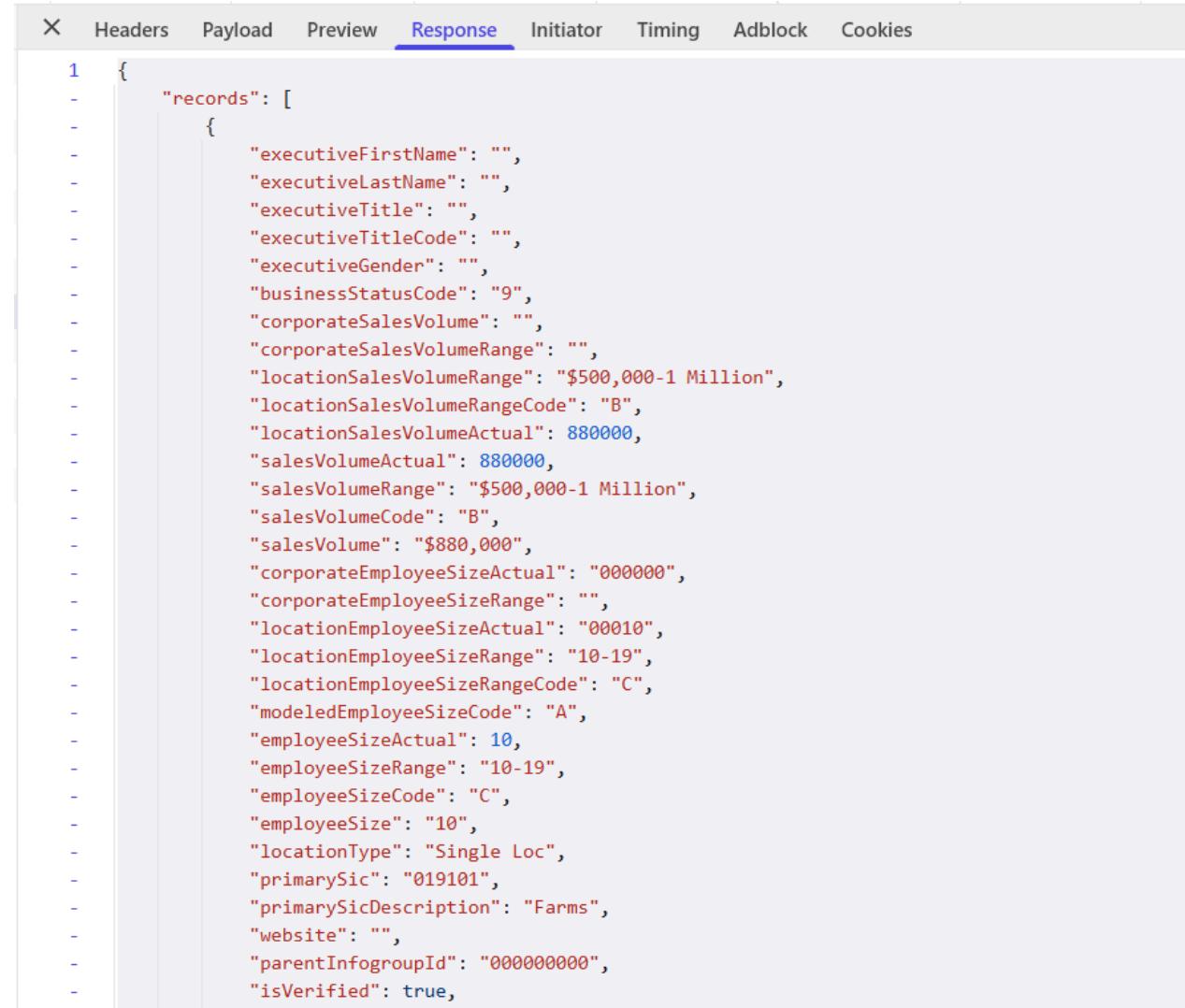
a.

10. Click on the file and click on the “Response” tab

Name	X Headers	Payload	Preview	Response	Initiator	Timing	Adblock	Cookies
☐ ⚑ recording?rt=5&rst=175615...								
☒ ⚑ recording?ct=2&happid=17...								
⌚ 1.0/?cors=true&content-type=...								
🖼 r.gif?MonitorID=d365&rid=d8...								
☐ 1.0.0.0?ObjectId=af45c04b-8f1...								
☐ 1.0.0.0?ObjectId=af45c04b-8f1...								
⌚ 1.0/?cors=true&content-type=...								
⌚ request/	▼ General							
⌚ track	Request URL			https://app.salesgenie.com/api/v2/Business/search/request/				
⌚ track	Request Method			POST				
☐ ⚑ recording?rt=5&rst=175615...	Status Code			● 200 OK				
☒ ⚑ recording?ct=2&happid=17...	Remote Address			199.125.10.78:443				
☐ ⚑ recording?rt=5&rst=175615...	Referrer Policy			strict-origin-when-cross-origin				
☐ ⚑ recording?rt=5&rst=175615...	▼ Response Headers	<input type="checkbox"/> Raw						
☐ ⚑ recording?rt=5&rst=175615...	Access-Control-Allow-Origin			*				
☒ ⚑ recording?ct=2&happid=17...	Cache-Control			no-cache,private; no-cache; no-store; max-age=0				
☐ ⚑ recording?rt=5&rst=175615...	Content-Length			160009				
☐ ⚑ recording?rt=5&rst=175615...	Content-Type			application/json; charset=utf-8				
☐ ⚑ recording?rt=5&rst=175615...	Date			Mon, 25 Aug 2025 19:53:00 GMT				
☐ ⚑ recording?rt=5&rst=175615...	Expires			-1				
a.	P3p			CP="CAO PSA OUR"				

11. Click into the response data field and do the keyboard shortcut
Ctrl+A and then ctrl-C to copy

a.



The screenshot shows the 'Response' tab of a browser developer tools interface. The response body is a JSON object with the following structure:

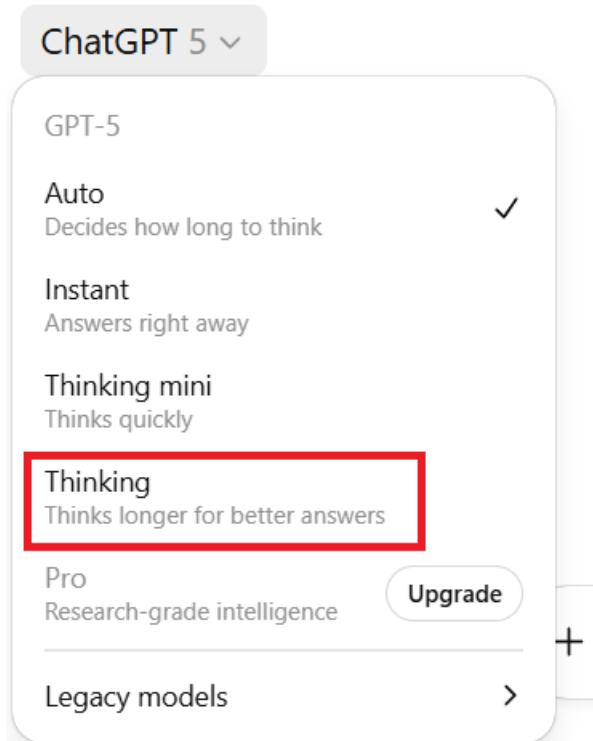
```
1  {
-   "records": [
-     {
-       "executiveFirstName": "",
-       "executiveLastName": "",
-       "executiveTitle": "",
-       "executiveTitleCode": "",
-       "executiveGender": "",
-       "businessStatusCode": "9",
-       "corporateSalesVolume": "",
-       "corporateSalesVolumeRange": "",
-       "locationSalesVolumeRange": "$500,000-1 Million",
-       "locationSalesVolumeRangeCode": "B",
-       "locationSalesVolumeActual": 880000,
-       "salesVolumeActual": 880000,
-       "salesVolumeRange": "$500,000-1 Million",
-       "salesVolumeCode": "B",
-       "salesVolume": "$880,000",
-       "corporateEmployeeSizeActual": "000000",
-       "corporateEmployeeSizeRange": "",
-       "locationEmployeeSizeActual": "00010",
-       "locationEmployeeSizeRange": "10-19",
-       "locationEmployeeSizeRangeCode": "C",
-       "modeledEmployeeSizeCode": "A",
-       "employeeSizeActual": 10,
-       "employeeSizeRange": "10-19",
-       "employeeSizeCode": "C",
-       "employeeSize": "10",
-       "locationType": "Single Loc",
-       "primarySic": "019101",
-       "primarySicDescription": "Farms",
-       "website": "",
-       "parentInfogroupId": "000000000",
-       "isVerified": true,
```

12. Open Notepad and paste the data into Notepad. Save the file as a .json file

The image shows a Windows desktop environment. On the left, a Notepad window titled "Untitled - Notepad" displays a large JSON object. On the right, a "Save As" dialog box is open, showing the save location as "Users > tmwsa > OneDrive > Theresa LLC". The dialog lists several files in the folder, including "FSS Theresa", "FSS work docs", "Insurance License etc", "Notary info", "Personal Aflac Plans", "Tax payments 2024", "The Alliance-Tri-state Financial", "Theresa LLC start up", "Tm Consulting -Accountant docs", and "Uber Records". The "File name:" field contains "AACounty, 1-7 years in business.json" and the "Save as type:" field is set to "Text Documents (*.txt)". The "Encoding:" dropdown is set to "UTF-8". At the bottom right of the dialog are "Save" and "Cancel" buttons.

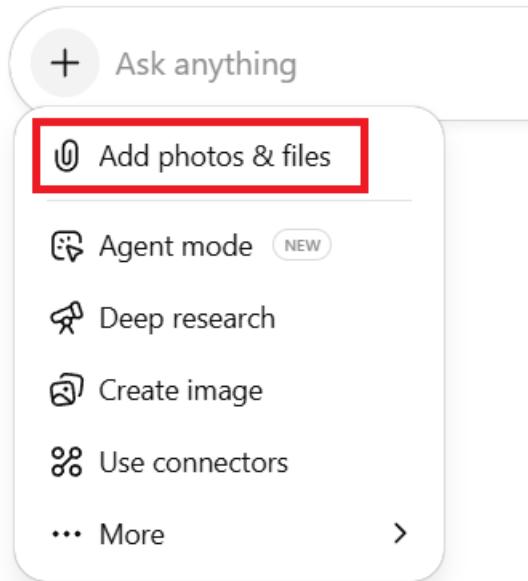
```
    "parentInfogroupId": "000000000",
    "isVerified": true,
    "primarySicFormatted": "8399-98",
    "timeZone": "",
    "experianBusinessCreditClassDescription": "",
    "experianBusinessCreditClass": "",
    "experianFinancialStabilityClassDescription": "",
    "experianFinancialStabilityClass": "",
    "experianIntelliscoreV2ClassDescription": "",
    "experianIntelliscoreV2Class": "",
    "businessName": "Annapolis-Anne Arundel County",
    "latitude": 38.97,
    "longitude": -76.52298,
    "msa": "Baltimore-Towson, MD",
    "unitNumber": "",
    "streetsuffix": "Dr",
    "latitudeformatted": "38.970000",
    "longitudeformatted": "-76.522979",
    "infogroupId": 787643408,
    "contacts": [
        {
            "mmdbContactId": 844367634,
            "firstName": "Crispin",
            "lastName": "Etherington",
            "gender": "Male",
            "title": "Manager",
            "executiveSourceCode": "36"
        }
    ],
    "address": "1783 Forest Dr PMB 341",
    "phone": "Not Available",
    "city": "Annapolis",
    "county": "Anne Arundel",
    "stateProvince": "MD",
    "postalCode": "21401"
},
],
"totalEmailRecordCount": 1321,
"totalDirectMailRecordCount": 5208,
"totalDisplayRecordCount": 957,
"savedSearch": "72cf0ec6-2489-4c24-890b-3e1c7c620cc9",
"totalRecordCount": 7493,
"pageSize": 90
a. }
```

13. Open ChatGPT, start a new chat, and select “Thinking” for the model type



a.

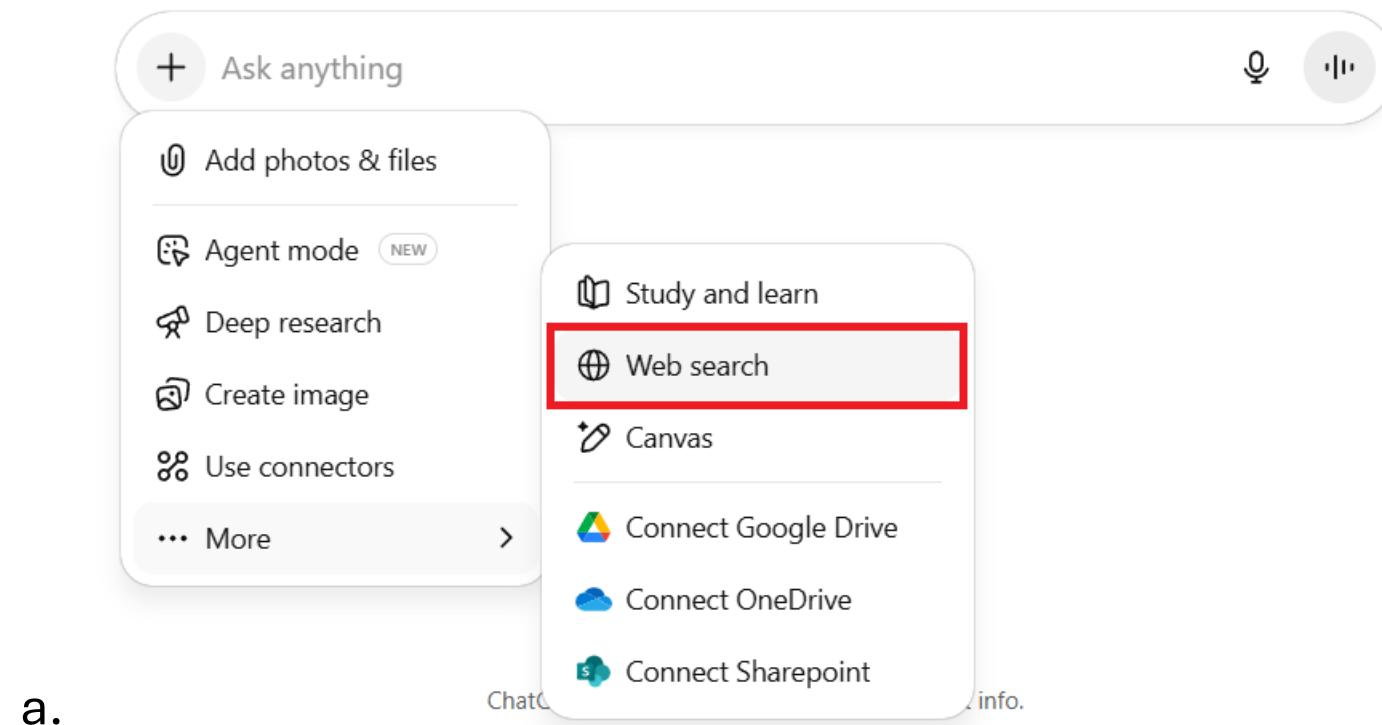
14. In the chat box, select “Add photos and files” and select the file you just extracted from CCLM



a.

15. Select the + button again and select “Web search”

Where should we begin?



a.

16. Copy the master prompt into the chatbox and run the prompt.

Where should we begin?

30 Annapolis.json

File

📁 Master Prompt: JSON → Enriched Excel with Call Tracking

You are given a JSON file with business records. Each record must be converted into a structured Excel spreadsheet (`.xlsx`) with enrichment and call-tracking fields.

📁 Column Map (JSON → Excel)

Excel Column	Source / Method
Called?	Insert unchecked checkbox
HQ State	Web search (<u>businessName</u> + address)
Company Name	!`businessName`!

+

0 ↑

a.

17. Watch the response to see if it continues to the end of the spreadsheet