DEAL MAKER 2.0

PODIO RE WHOLESALER CRM

BY: WHOLESALE DISCORD

BOARDING - MY CORP

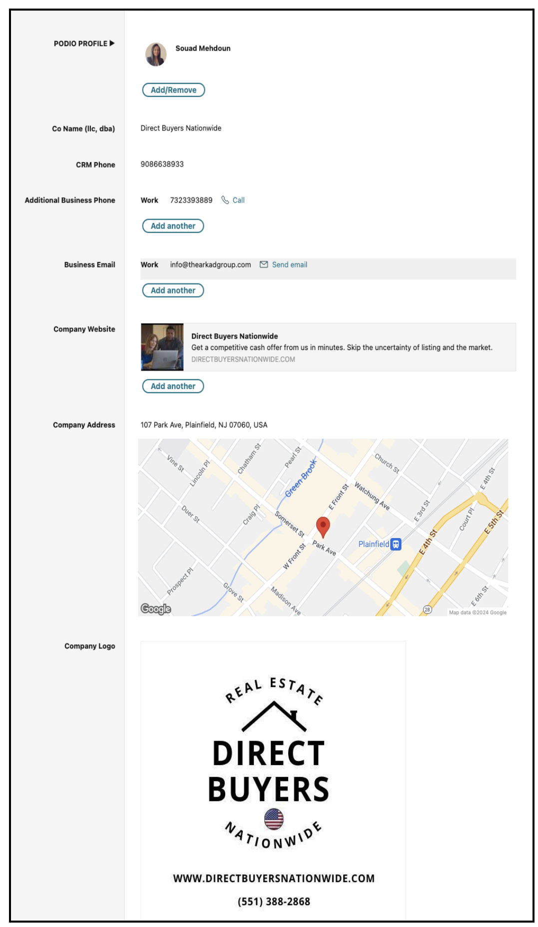
BOARDING

Welcome to Your Corp App. The information here will carry through the entire Deal Maker CRM. Here where your boarding will also take place. By adding the information below, you are calibrating your crm to communicate with you and clients accordingly. Example: Your roles, llc name, logo, email address, etc (it's ok if you don't have these), will appear automatically in your marketing and overall outreach to sellers and buyers.

Section 1 - Business Profile

Add all the basic information you have available.

- **PODIO PROFILE:**
  - Your name as you want it seen by clients
  - Your business email (if you don't have one, create a Gmail Account
    - *Ex." YourCoName @gmail.com"*
  - Your Phone number can be your personal cell phone or direct phone line.
    - Calls will be transferred to this number.
- **Co Name:** Use your LLC Name.
  - If you don't have one. It's ok.
  - If you'd like to open one up. Try **Lawdepot**
  - You will need an EIN# to be able to send SMS. You can get one for free here. **IRS-EIN Registration**. (related to the next step)



- **CRM Phone**: This is the number your CRM comes with. You can use it as a phone or a power dialer to call sellers or buyers. You can also send sms from it and it is the number used for SMS within your CRM functionalities
    - *Ex. SMS Sent to the seller when an offer goes out and when signed and received back to you.*

In order to send SMS out, you will need to register your Tax ID via 10DLC $ A2P registration. We handle it for our clients as a complementary service.

1. Register her and **get a TAX ID** (immediately via PDF)
2. Simply send us your information here. **SMS Registration**

The process will take about 30 days. However, your CRM will be able to make calls, receive calls (including power dialer); as well as receive SMS from clients.

- **Business Phone**: Add any other phone you'd like to use for business. Generally this would be your overall company phone. In case you want another method of connectivity.
- **Business Email**: Make sure this email matches the one in your PODIO PROFILE (above). If you don't have one, you can try **REIShop.io**.
- **Business Website**: Definitely a needed step but they can come later too. We provide you with webforms to share that are connected to your crm, which will allow for similar communication. Once you have a site, you can embed your webforms to your site (more below)
- **Logo**: Add your logo image. This will customize all outgoing marketing automatically for you. If it ever changes, simply change it here.
    - If you don't have one, we have some **Free Templates** for you here

NOTE: If you don't have a website, or business email yet, that's ok. Leave this blank for now.

Section 2 - Core Team

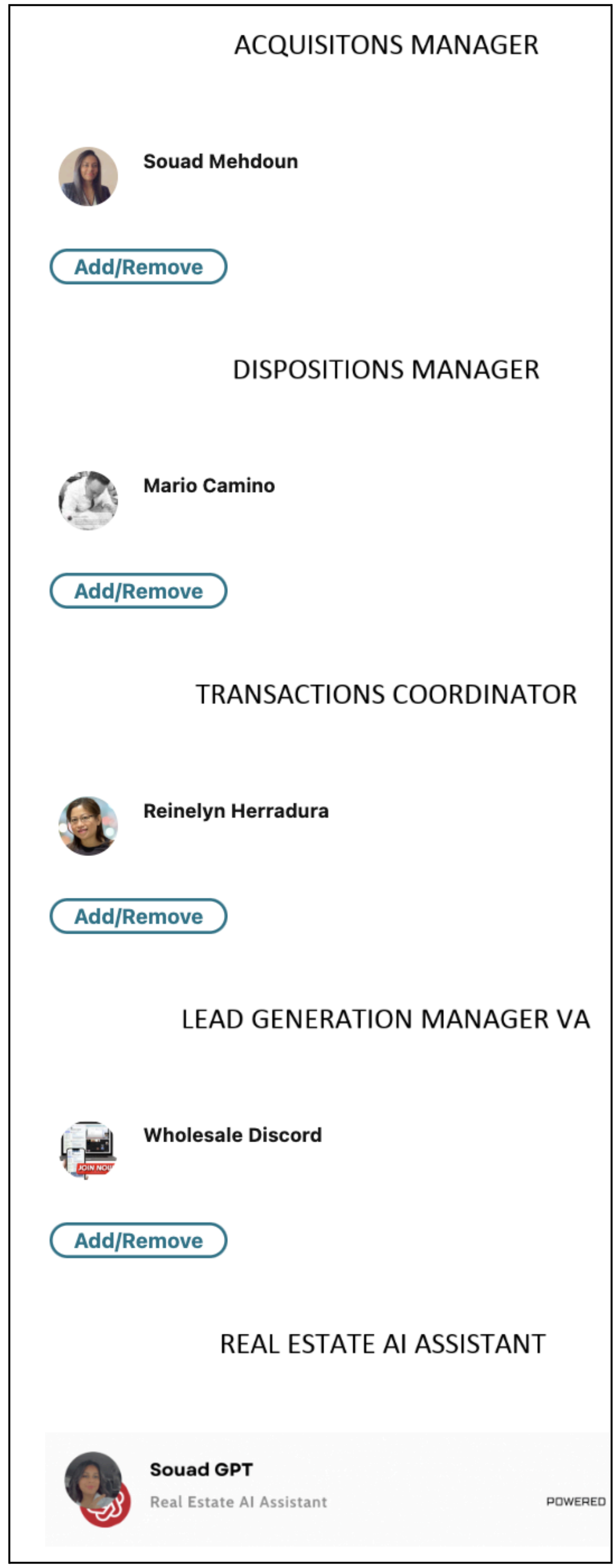
Your core team is the engine of your real estate wholesaling business, each member playing a crucial role in driving success. Acquisitions and dispositions managers are key, deftly navigating deal sourcing and property sales, ensuring each transaction aligns with your goals. Just starting up? No worries, this is a structure to follow. For you now, you will be wearing most if not all 4 hats.

- **Acquisitions Manager:**
  - This member **SHOULD ALWAYS BE YOU!**
  - This will be the member of your team in charge of locating, pricing and putting properties UNDER CONTRACT. In the beginning, this will be you. They analyze market trends, negotiate deals, and foster relationships, ensuring a steady deal flow. Working closely with the team, they facilitate a smooth acquisition process.

- **Dispositions Manager:**
  - This will be the member of your team in charge of m efficiently selling or disposing of properties after acquisition. They are adept at marketing properties, setting the right prices, and identifying potential buyers or investors. Their primary goal is to ensure that each property is sold swiftly and profitably, aligning with the company's goals

- **Transaction Coordinator:**
  - This will be the member of your team in charge of ensuring that every operation runs smoothly and efficiently. They manage administrative tasks, coordinate transactions, & maintain meticulous records of all deals from initiation to closure. Their keen attention to detail and organizational prowess guarantee that contracts are properly executed, deadlines are met, & compliance with legal & regulatory standards is met.

- **Lead Gen VA or Virtual Acquisitions Manager.**
  - This will be the member of your team in charge of analyzing market trends to target sellers & buyers effectively & using CRM tools to track and manage leads efficiently. The Lead Generation Manager's ability to consistently supply high-quality leads is fundamental to the business's growth, ensuring steady deal flow..



<u>Section 3 - 3rd Party Services</u>

They are crucial services that add to your operation. Make sure you nurture these relationships as your business grows, as they will become part of your success. These are relationships that you may not have when just starting up, but are very much needed as you grow your wholesale business.

- **Title Co**
  - The role of a title agent is indispensable. First one in this list of services. Serving as the linchpin of the transaction process, they ensure the smooth handling of closings, meticulous title searching and clearing & securing of escrow funds. Their expertise is crucial in safeguarding transactions, guaranteeing that properties are legally unencumbered of liens & that payments are promptly disbursed.
  - **If you need an investor friendly title co in your state, go to your TITLE CO app. We have done all the homework.**
- **Attorney**
  - While their services might not be a statutory requirement in all regions, having a knowledgeable attorney by your side can significantly mitigate risks, safeguard your investments, and provide you with the confidence to make informed decisions in your real estate endeavors. They can also facilitate closings by working closely with the title companies on your behalf

- **Realtor**
    - Realtors bring to the table their extensive understanding. Their wide network of contacts, including potential buyers and industry professionals, can significantly broaden your reach and exposure. While not an essential part of every wholesaling deal, partnering with a realtor can offer enhanced market insight, facilitate smoother transactions, and potentially expedite the sale process.
- **Leads Service**
    - A good lead service can make a significant difference in the trajectory of your business. A superior lead service provides a steady stream of well-researched, relevant leads, enabling you to focus on nurturing relationships and closing deals rather than on the initial hunt for prospects. Needless to say, **Wholesale Discord** is always ready to give you the best seller & cash buyers leads available in the USA .

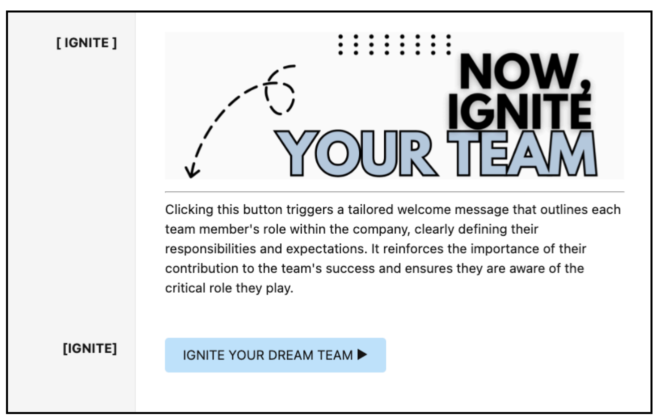
- **Hard Money Lender**
    - A HML can be a strategic ally, offering swift and flexible financing solutions for your and/or your end buyers investments. They provide the capital you need to seize opportunities promptly, ensuring that you can renovate, flip, or hold properties according to your strategy. Our go to Hard Money Lender is **Arkad Capital**
- **Boots on the Ground**
    - This is someone who can help you get things done on Deals you cannot get to do the distance. It can be a realtor or another wholesaler who may or may not get paid a couple hundred dollars for this particular task. as the relationship evolves, these are great candidates for acquisitions managers
- **Mentor / Coach**
    - A mentor brings a wealth of experience, offering insights that can help you navigate challenges, refine your strategies, and accelerate your growth in the industry. They serve as a sounding board for your ideas, provide constructive feedback, and help you avoid common pitfalls, leveraging

their own successes and lessons learned to propel you forward. [Wholesale Discord]() stands out as an excellent option

- **Contractor**
  - Contractors enable wholesalers to make informed decisions about property investments. Their bids are not just numbers; they are a reflection of careful assessment & a commitment to quality workmanship, which is essential for the wholesaler to evaluate the viability and profitability of each project
- **Marketing**
  - These skilled professionals craft and execute strategic social media campaigns that significantly enhance your visibility and engagement with potential clients and investors. They understand the nuances of different platforms and leverage this knowledge to showcase your properties, share success stories, and build a community around your brand.

[IGNITE YOUR TEAM]

Clicking this button triggers a tailored welcome message that outlines each team member's role within the company, clearly defining their responsibilities and expectations. It reinforces the importance of their contribution to the team's success and ensures they are aware of the critical role they play.



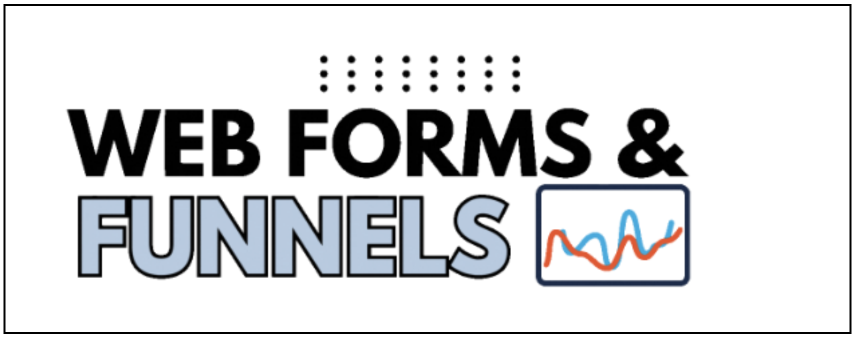
Section 4 - CRM Phone Set Up

Our dialer enables you to make calls, employ auto-dialing functionalities, send SMS messages—both individually and in bulk—set reminders, and much more.
There's no additional cost for the dialer and phone number; simply add minutes to your plan, and you're ready to start engaging effectively.

You can **load your minutes here**

- **CRM Phone:** Same number we assigned you (section 1)
- **Log In:** You will receive it via email and sms.
- **Password**: You will receive it via email and sms.
- **Balance**: Your current remaining balance.
- **Credits**: Calling credits.

Dialer Link: https://app.dealfone.com/login
A2P SMS Registration: https://wholesalediscord.com/sms-registration
Credits: https://wholesalediscord.com/sms-pay-as-u-go



Section 5 - Webforms and Funnels

Connect your CRM to your Website - Copy & paste the HTML onto your site or use the link on your marketing.We've streamlined the integration between your online presence and your backend operations by automatically embedding webform HTML code and URL links for crucial apps—Buyers, Sellers, Showings, and Offers. This automation ensures that you can effortlessly copy and paste these elements onto your website, seamlessly connecting your CRM with your primary online marketing platform.

APP URL: Allows you to share a link for your webforms. Quick, simple and efficient. These are same links that are added on your emails. Ex, Deal blaster has Offers and Showings links. This way, clients can still communicate with you even if don't have a website.

APP HTML: This allows you to embed this webform in your website. Simply copy and paste into the HTML window added on your site.

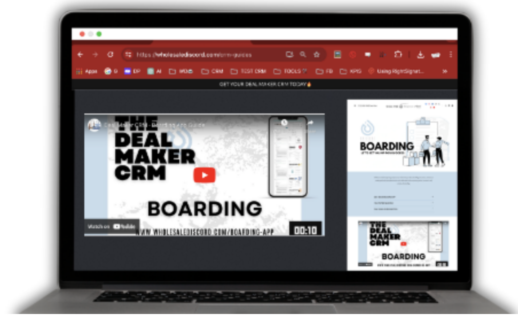
Sellers App	For sellers to give you more detailed info on their properties.
Buyers App	For buyers to give you their buying criteria
Showings App	For buyers to set up appointments to see your deals.
Offers App	For buyers to make offers ion your deals.
Walkthrough App	For your team to assess a property remotely.

Section 6 - Video Guides

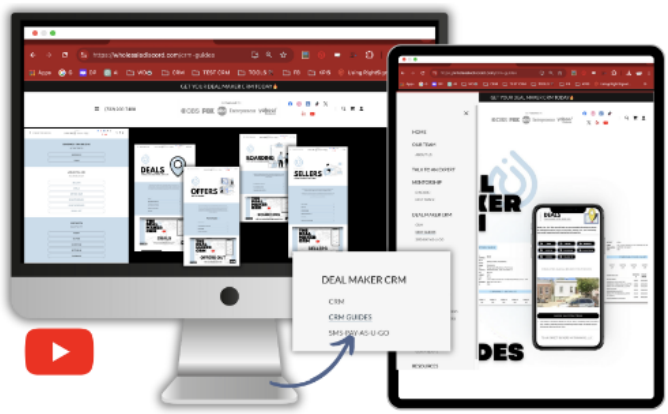
As you embark on this journey to fully harness the capabilities of your new CRM, it's crucial to familiarize yourself with all the tools and features available. Here's a straightforward path to ensure you're fully equipped to maximize your CRM's potential.

STEP 1. Begin with our comprehensive **Getting Started Guide**, which will provide you with an overview of the CRM's functionality and set-up processes.

STEP 2. Review Corp App / Boarding. Proceed to the **Your Corp App Guide**. This guide is crucial as it walks you through the initial setup steps necessary for personalizing your CRM experience.



STEP 3. Explore **All App Guides** in the recommended order below. These guides cover detailed functionalities of each app within the CRM, ensuring you understand how to effectively use each feature.



ACQUISITIONS APPS

DEALS APP
OFFERS APP
WALKTHROUGHS APP
JOINT VENTURES APP

DISPOSITION APPS

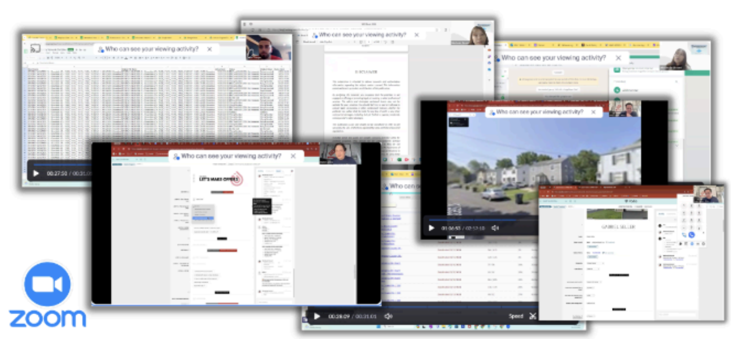
DISPO APP
BUYERS APP
SHOWINGS APP
CLOSINGS APP

OFFICE MANAGEMENT APPS

TITLE CO'S APP
NETWORKING APP
CO DOCS APP
CO GOALS APP
CO TASKS APP
CO EXPENSES APP
COMMUNICATIONS APP
DRIP CAMPAIGNS APP

STEP 4. Join in our **Live Demo Sessions**. These sessions are designed to discuss the functionalities of the CRM in a live environment, providing you the opportunity to ask questions and see the CRM in action.

STEP 5. If you have specific questions or need further clarification, don't hesitate to set up a Zoom training appointment with our support team. We're here to help you navigate through any challenges.



We are available mon-friday every week at the times below (eastern time zone). Training sessions usually last for **about 30-45 mins and are booked for the current week.** Make sure you have the App or Function in question ready

[Click here to schedule it]