



DEAL MAKER CRM

GETTING STARTED



MENTORSHIP VA's LEADS SKIP TRACE CRM DISPO

(732) 200-7480

info@wholesalediscord.com

www.wholesalediscord.com/crm-guides

CHECKLIST

While your CRM is getting built..



1

Getting Started

- ☐ [Getting Started](#) Video Guide
- ☐ Bookmark [CRM Guides](#)
- ☐ Bookmark [DealFone](#)
- ☐ Easier use w/ [Google Chrome](#)

2

Guides

- ☐ Reviewed [All APPS GUIDES](#)
- ☐ Watched all [Guide Videos](#)
- ☐ Watched [Live Demos](#)
- ☐ Review [Dialer Guide Video](#)
- ☐ Receive Email Guides Weekly

3

Podio

- ☐ Received my Podio Invite
- ☐ Created [Free Account](#)
- ☐ Play with your CRM

4

Boarding

- ☐ Reviewed [Boarding Guide PDF](#)
- ☐ Watched [Boarding Video](#)
- ☐ Complete **YOUR CORP App**
- ☐ Completed [A2P form](#)
- ☐ Reviewed [SMS / Phone Pricing](#)
- ☐ Scheduled a [Boarding Zoom](#)

Clerical

Create a [Tax ID](#)

Register an [LLC](#)

Get a [Website / Email](#)

Hire a [Virtual Caller](#)





DEAL MAKER CRM

Welcome to an exciting journey with your new Deal Maker CRM, tailor-made for real estate wholesaling. We've prepared everything you need to hit the ground running and maximize your CRM experience.



The Deal Maker CRM stands as your ally, equipping you with the tools and insights needed to identify opportunities, optimize operations, and ultimately, secure profitable deals. The following guides are here to help you prepell your operations to unseen and unfelt levels..

www.wholesalediscord.com/crm-guides

2. CRM GUIDES

You find find guides for each app on our website & throughout your CRM applications.



www.wholesalediscord.com/crm-guides



3. EMAIL GUIDES, LIBRARY & DEMOS

Once boarding is complete, you will begin receiving Email Guides on each app over a 2 week period.

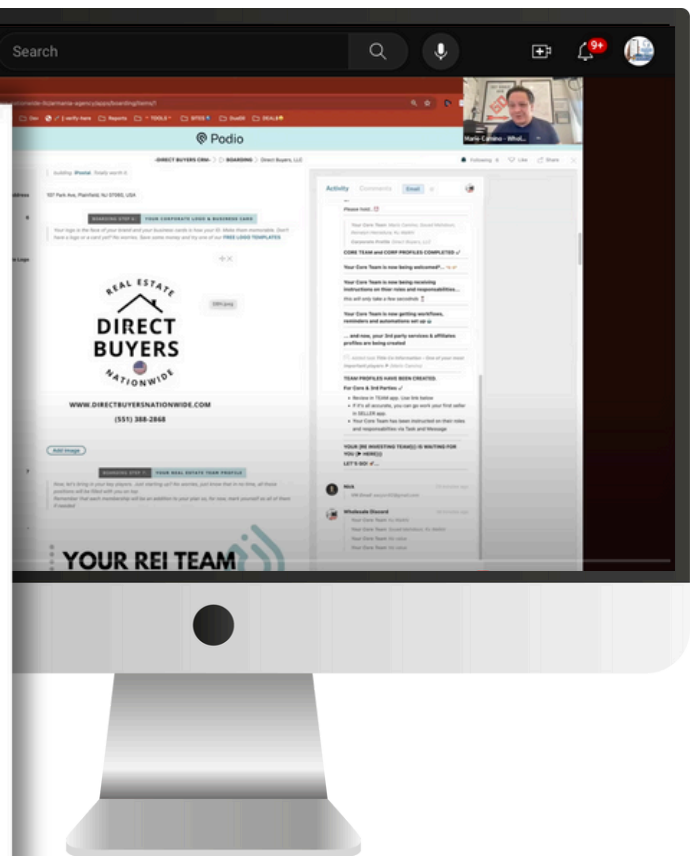
Also, join us on fridays at 12pm (est) for LIVE Demos



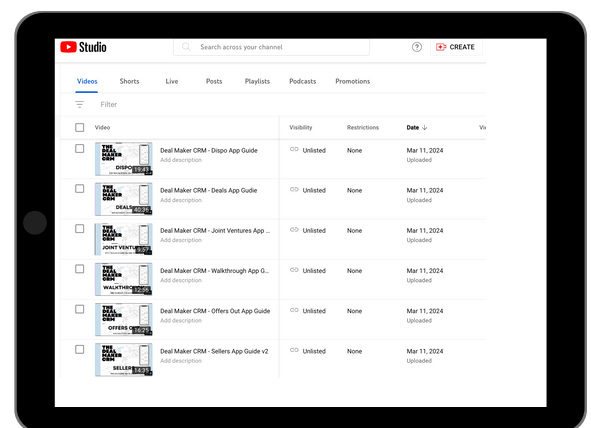
LIVE ZOOM DEMOS



EMAIL GUIDES



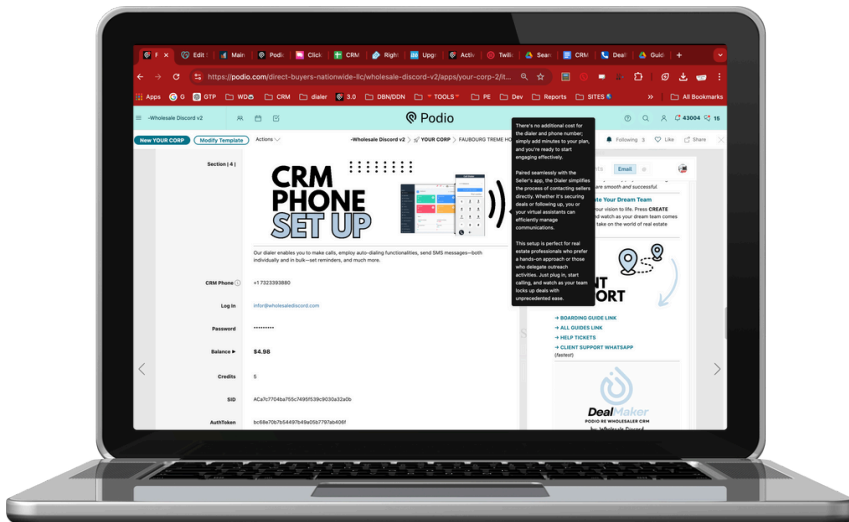
YT LIBRARY



www.wholesalediscord.com/demos

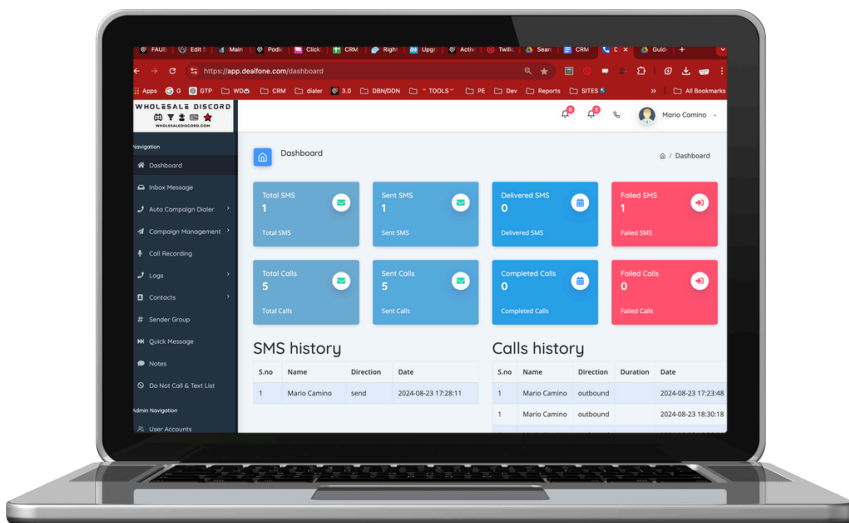
4. YOUR PHONE & SMS

Your CRM comes with a FREE dialer & local (state) number you can use for Calls and SMS right from your apps. Go there now → [dealfone.com](https://www.dealfone.com)



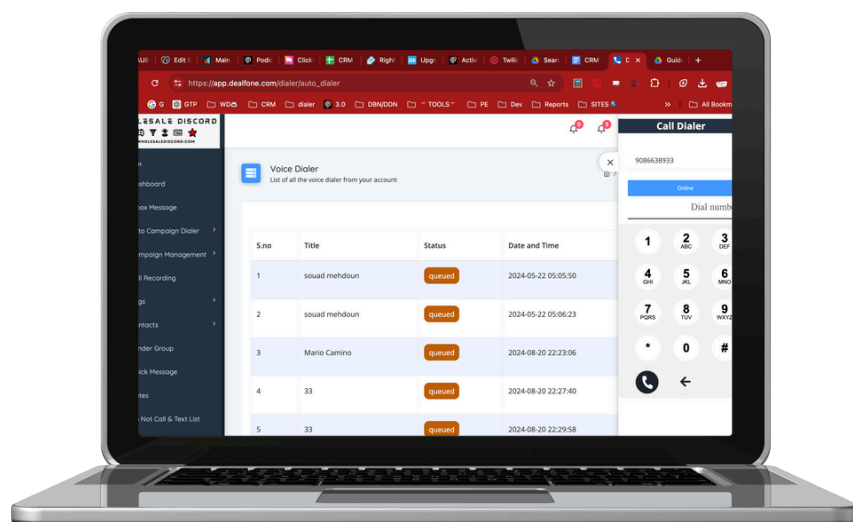
Your CRM Phone # In YOUR CORP APP (section 4)

- You can find all the info you need in your corp app. (log in / passw and credentials)
- Your billing will also display in this section www.dealfone.com



Dashboard

- Keep track of all your activity. Calls & SMS for you and your team



Single Call or Power Dialer

- Easy to dial and call
- or Upload an Excel or CVS file w your contacts and begin calling.

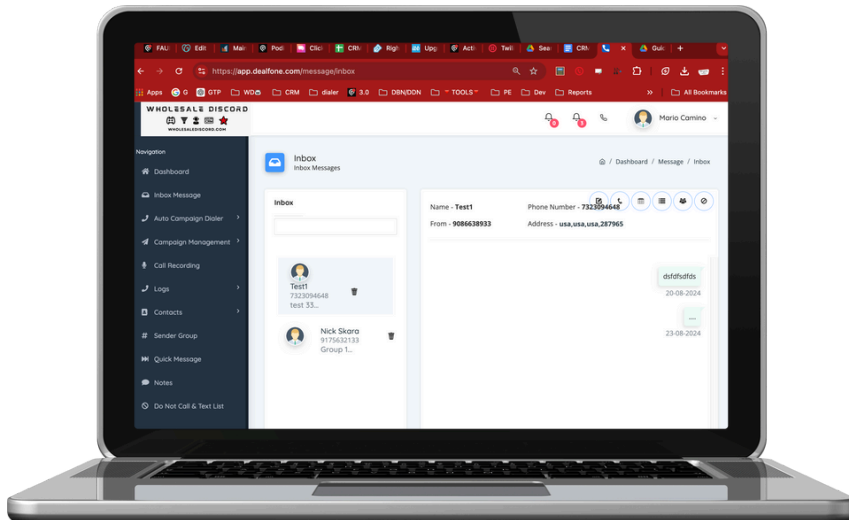
YOUR PHONE & SMS

Your CRM comes with a phone & local (state) number you can use for calls and SMS right from your apps.



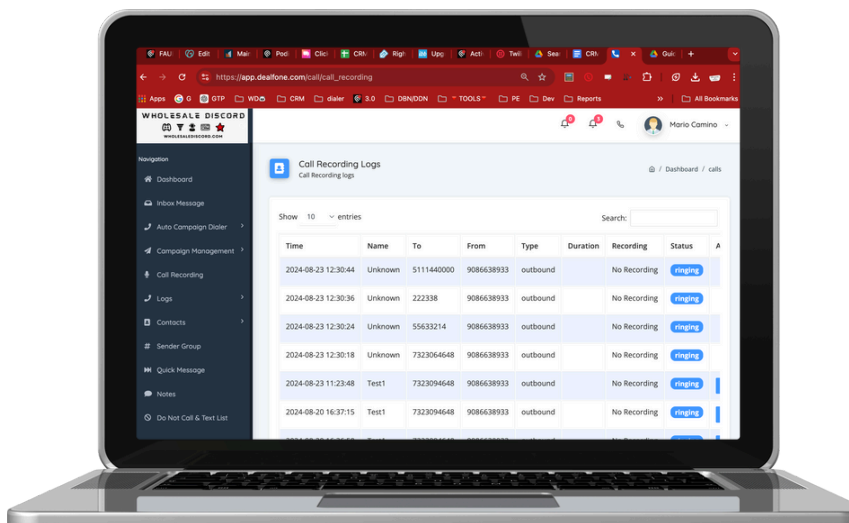
Single SMS or Bulk Txt

- Send a message from here or or set up bulk campaigns from your Blaster app!



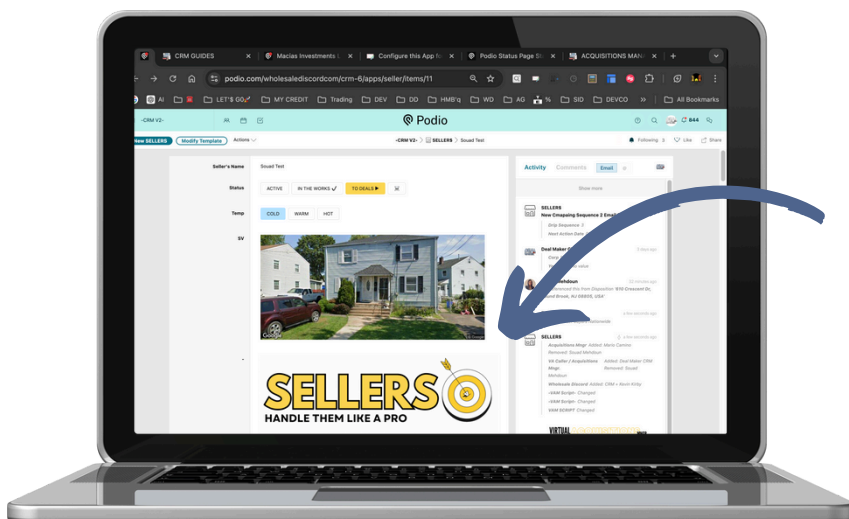
Call Recording

- Keep record of all your call making.
- Review your teams performance



CRM Integration

- When a call comes in, Your Sellers App will locate your lead and pull up their profile



5. SMS A2P REGISTRATION

Your CRM comes with a phone & local (state) number you can use for calls and SMS right from your apps.



SMS IS ONE OF THE MOST POWERFUL TOOLS

To unlock this feature's full potential, including the ability to send & receive SMS replies, it's necessary to be registered with the Department of Human Services via the A2P 10DLC Registration System.

A2P Registration Page

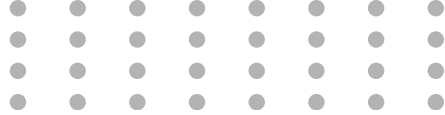
NOTE: The process will take 30 days before you can send individual or BULK SMS Campaigns

TAX ID

- LLC/DBA Name / Address
- Send up to 2,500 SMS / day
- \$5 fee / campaign

NO TAX ID

- Personal Name / Address
- Send up to 1,000 SMS / day
- \$15 fee / campaign



CALLING / SMS PRICING GUIDE

Pay as you go.. No Monthly fees

	1-10 Numbers	11-50 Numbers	51+ Numbers
Local Numbers	\$5/number	\$4/number	\$3/number
Toll Free	\$10/number	\$8/number	\$7/number

Calls	Cost Per Minute
Outbound	\$0.020
Inbound	\$0.020

SMS	Cost Per SMS
Outbound	\$0.020
Inbound	\$0.020

Packages	Cost	Your Minutes or SMS
Basic	\$20	1,000
Growth	\$50	2,500
Pro	\$100	5,000
Boss	\$250	12,500

6. YOUR CRM IS BEING BUILT

We are customizing your machine. Should be ready within the next 24 hours.

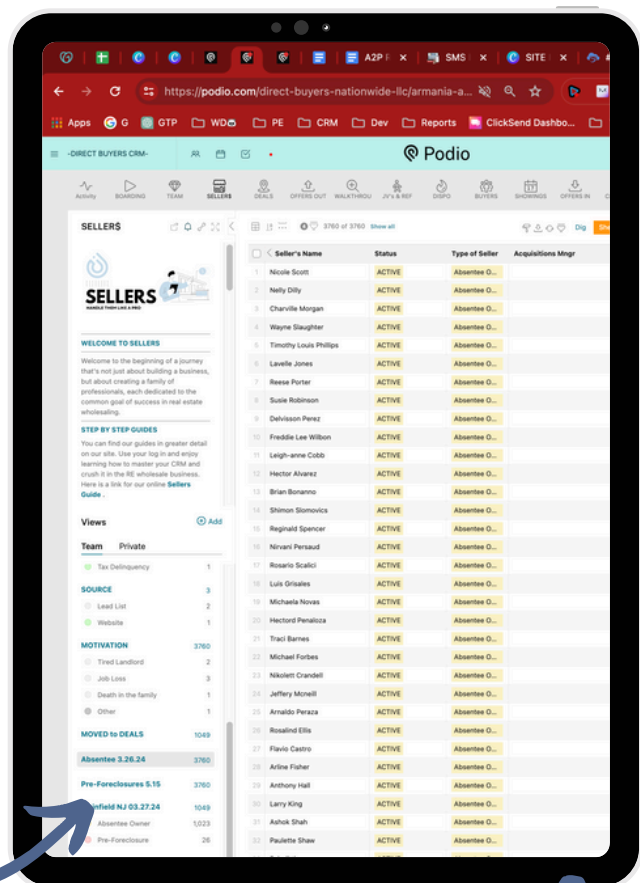


YOU LEADS ARE BEING LOADED

If you're among the first 500 subscribers, we're offering an exclusive bonus: **receive 500 leads of your choice every month for the next 12 months.**

These leads will be **automatically** uploaded to your CRM on the first of each month, giving you a constant stream of opportunities.

- They will be added to your **Sellers App** every month on the 1st. You can find them in your Views



**NATIONWIDE
TITLE COMPANY DATABASE
IS ALSO BEING LOADED**

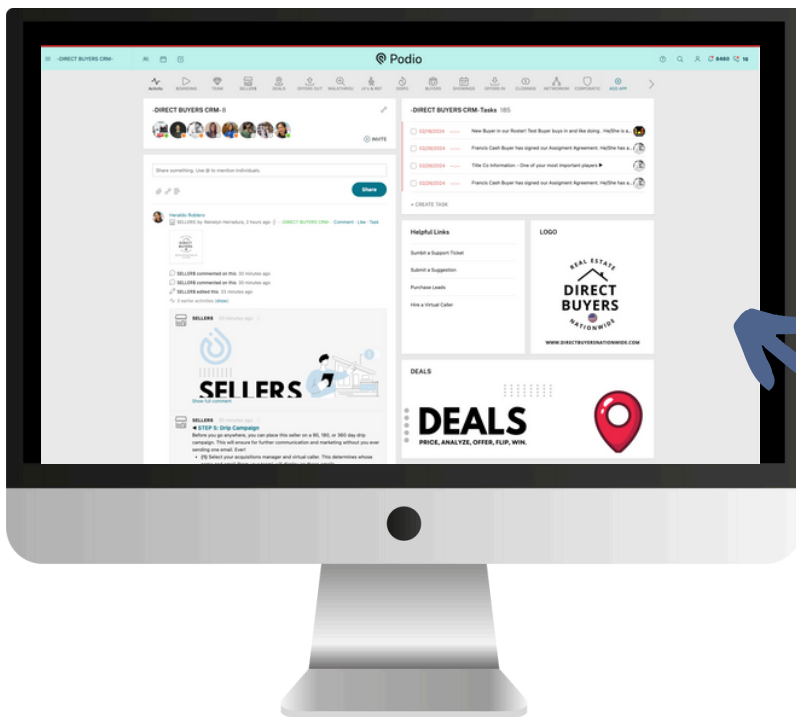
www.wholesalediscord.com/crm-guides

YOUR CRM IS BEING BUILT

Your CRM is set up for you and your requirements.
A couple of tweaks here and there and ...magic



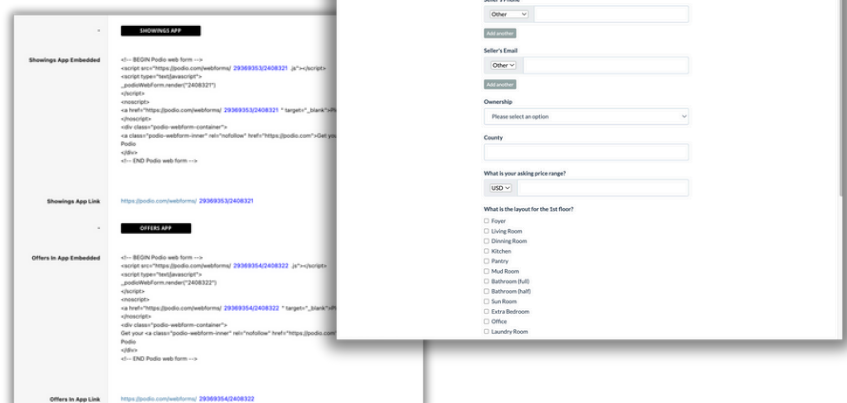
YOUR DASHBOARD IS GETTING SET UP



We are customizing
your KPI's, Logos,
Colors, Links, Co info,
domains, the works!

AND YOUR WEBFORMS TOO (FOR YOUR WEBSITE)

You will find these at
the bottom of every
app as well in your
CONFIG app.
You can now connect
your site to your CRM



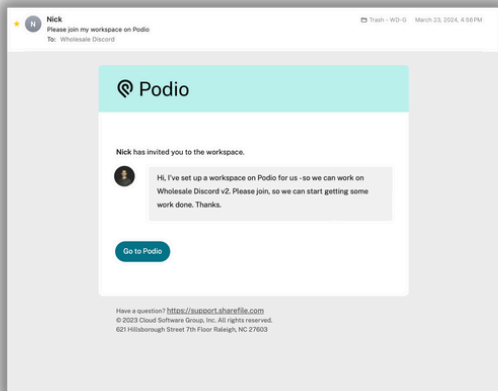
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7. YOUR CRM IS READY

By now, you have received an Invite from your CRM via email. Additionally, a dedicated WhatsApp Chat has been initiated.

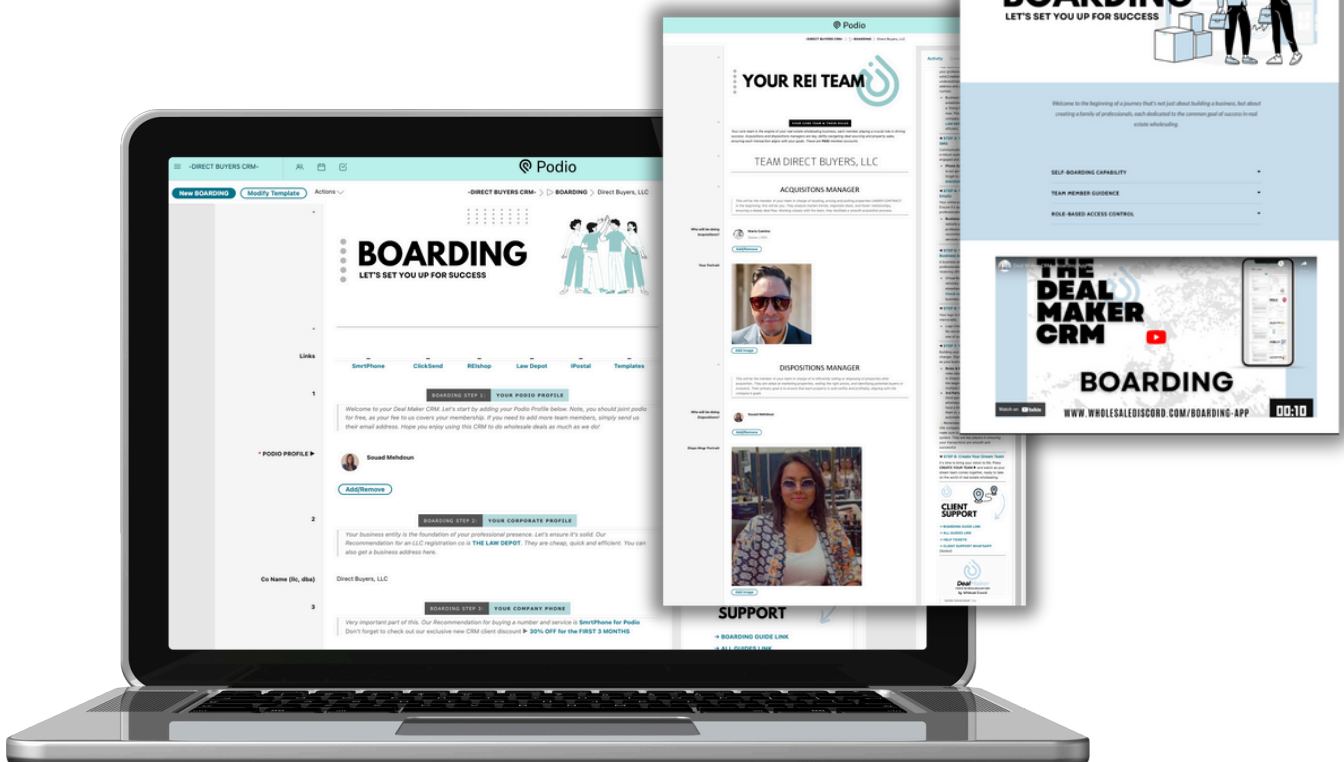


INVITE & BOARDING



- Accept our Email Invite & Sign up for a **FREE Podio Subscription**
- Complete your Podio Profile
 - **Use your business email and CRM Phone # we gave you!**

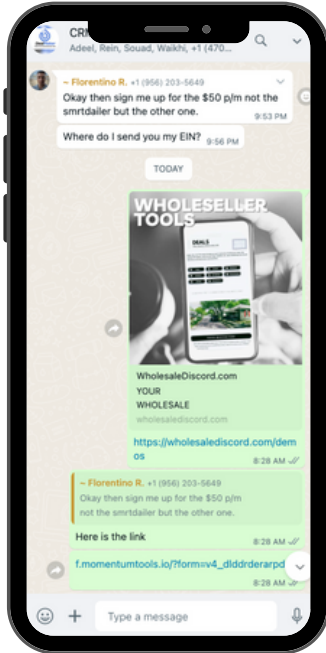
- Review [Boarding App Guide](#) on our site
- Go to your Boarding App in your CRM
- Create Your Team's Profiles and Roles
- Review the rest of your [ONLINE GUIDES](#)



NOW... YOUR SELLER LEADS ARE WAITING
LETS GOOO!

CLIENT SUPPORT

We are here and reachable in more than one way.



**CLIENT GROUP CHAT
WHATSAPP**

**DEDICATED CHAT
WHATSAPP
OR TEXT**



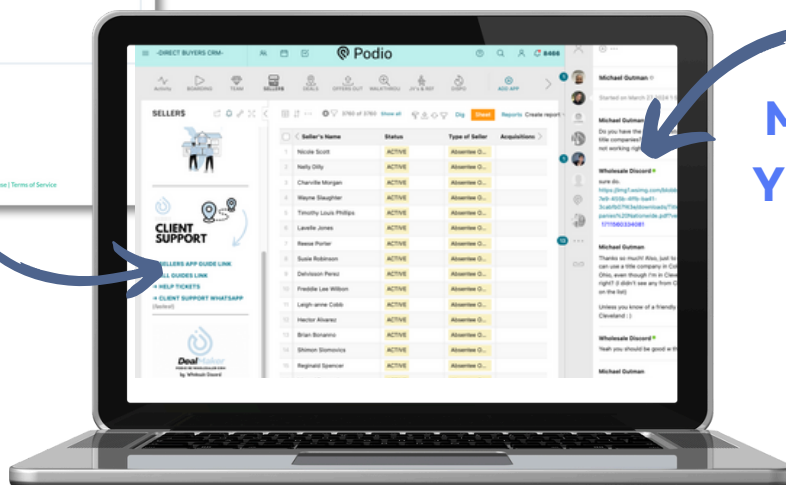
**HELP TICKETS
FROM YOUR CRM**

Issue

Please describe the issue

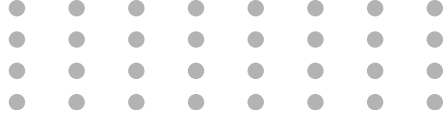
Submit

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**MESSAGE US ON
YOUR CRM**

**info@wholesalediscord.com
(732) 200-7480**

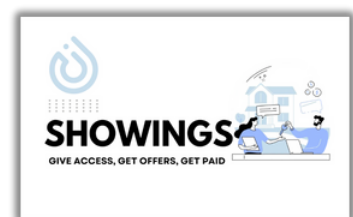
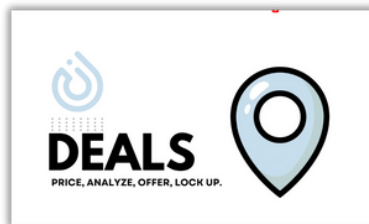
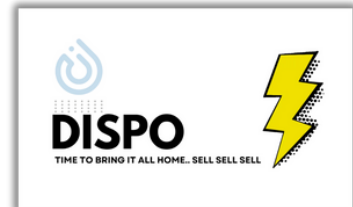


APP GUIDES LINKS

ACQUISITION APPS

DISPOSITION APPS

BOARDING APPS



VIRTUAL OFFICE APPS