

# DEAL MAKER CRM

## GETTING STARTED



**WHOLESALE**   
**DiSCORD.com**    
  
  


MENTORSHIP VA's LEADS SKIP TRACE CRM DISPO

(732) 200-7480

[info@wholesalediscord.com](mailto:info@wholesalediscord.com)

[www.wholesalediscord.com/crm-guides](http://www.wholesalediscord.com/crm-guides)

# CHECKLIST

Let's make sure we did what we had to



## Getting Started

- [Getting Started](#) Guide
- Reviewed Useful Links
- Bookmarked [CRM Guides](#)
- Downloaded [Google Chrome](#)

## Guides

- Reviewed [All APPS GUIDES](#)
- Watched all [Guide Videos](#)
- Watched [Live Demos](#)
- Started Receiving Email Guides

## Boarding

- Reviewed [Boarding App](#)
- Added my Contact Info
- Created my [Team](#)
- Added Team & 3rd Party Contact info

## Podio

- Received my Podio Invite
- Created [Free Account](#)
- Read the [Podio Guide](#)
- Familiarized myself with the CRM

## Phones/SMS

- Downloaded [Twilio Plug-In](#)
- Added my credentials
- Activated & Tested 10 Calls
- PINNED it on my browser
- Completed [A2P form](#)
- Reviewed [SMS / Phone Pricing](#)

## Clerical

- Created a [Tax ID](#)
- Registered [LLC](#)
- Got a [Website / Email](#)
- Hired [Virtual Callers](#)



# DEAL MAKER CRM

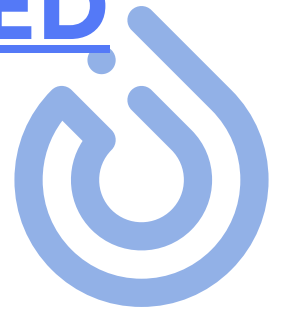
Welcome to an exciting journey with your new Deal Maker CRM, tailor-made for real estate wholesaling. We've prepared everything you need to hit the ground running and maximize your CRM experience.



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](http://www.wholesalediscord.com/crm-guides)

# GETTING STARTED



## 2. USEFUL LINKS

Visit these sites before getting started.

**Bookmark your Guides.** Download and Set up your browser & phone extensions

### CRM GUIDES

You have access to all video and written guides for every app  
[www.wholesalediscord.com/crm-guides](http://www.wholesalediscord.com/crm-guides)

### PODIO

Create a **FREE** Account. Your membership is covered with our fee  
[www.podio.com](http://www.podio.com)  
[www.podioguide.com](http://www.podioguide.com)

### CHROME

PODIO works better with Google Chrome Web Browser  
[www.google.com/chrome](http://www.google.com/chrome)  
[www.apps.apple.com/us/app/google-chrome](http://www.apps.apple.com/us/app/google-chrome)

### DIALER

PODIO works better with Google Chrome Web Browser  
[www.chromewebstore.google.com/detail/auto-dialer](http://www.chromewebstore.google.com/detail/auto-dialer)

### CLERICAL

Browser Services that you will need along your journey

[LLC](#) [TAX ID](#) [WEBSITES](#) [EMAILS](#) [LOGOS](#) [MAILBOX](#)

# 3. CRM GUIDES

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



[www.wholealediscord.com/crm-guides](http://www.wholealediscord.com/crm-guides)

**DEAL MAKER CRM**

- CRM
- CRM GUIDES**
- SMS-PAY-AS-U-GO

**DEALS**  
PRICE, ANALYZE, OFFER, LOCK UP.

**OFFERS**  
OUT TO SELLERS

**BOARDING**  
LET'S SET YOU UP FOR SUCCESS

**SELLERS**  
HANDLE THEM LIKE A PRO

**THE DEAL MAKER CRM**

WHOLESALEDISCORD.COM/DEALS-APP

WHOLESALEDISCORD.COM/OFFERS

WHOLESALEDISCORD.COM/BOARDING-APP

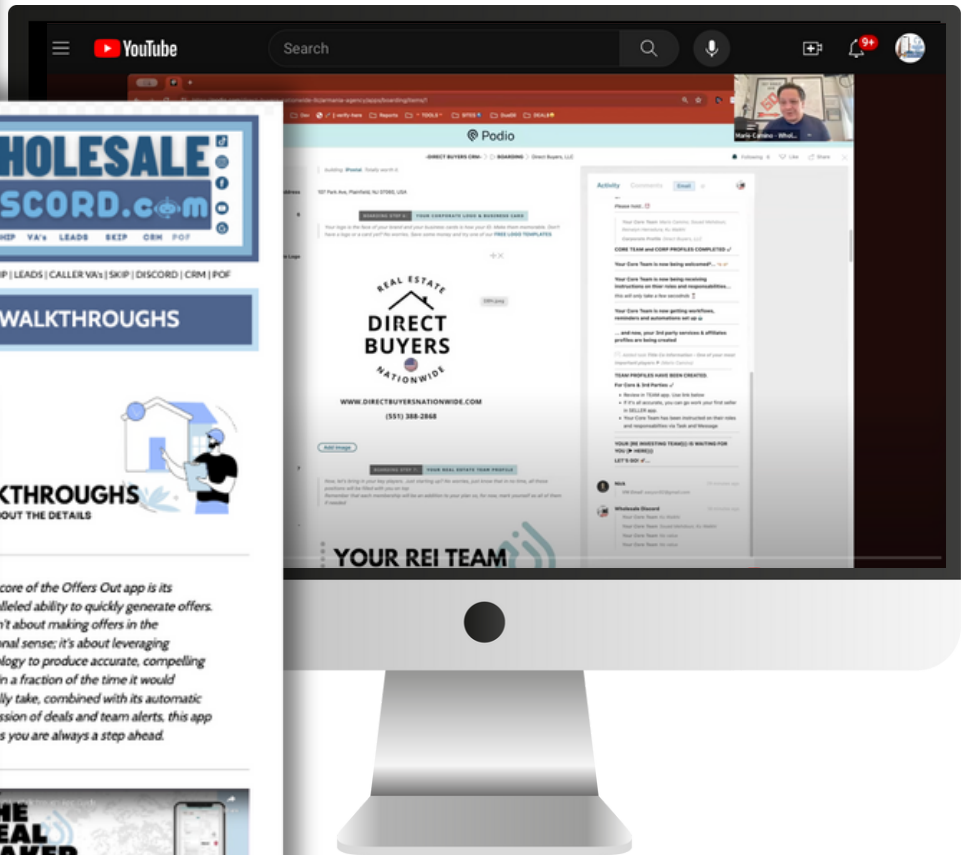
WHOLESALEDISCORD.COM/SELLERS-APP

# EMAIL GUIDES, LIBRARY & DEMOS

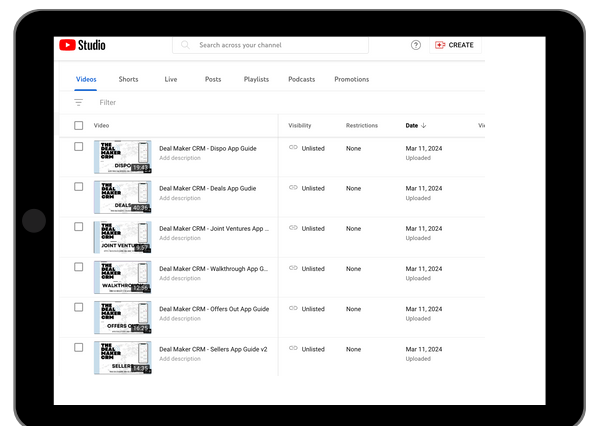


Once boarding is complete, you will begin receiving Email Guides on each app over a 2 week period. Also, join us on fridays at 12pm (est) for LIVE Demos

## LIVE ZOOM DEMOS



## YT LIBRARY



## EMAIL GUIDES

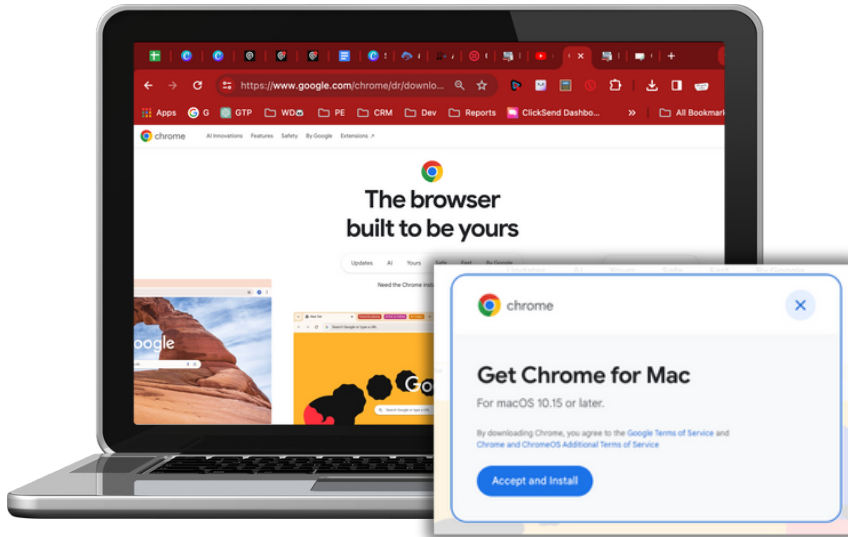


[www.wholesalediscord.com/demos](http://www.wholesalediscord.com/demos)

## 4. YOUR PHONE & SMS

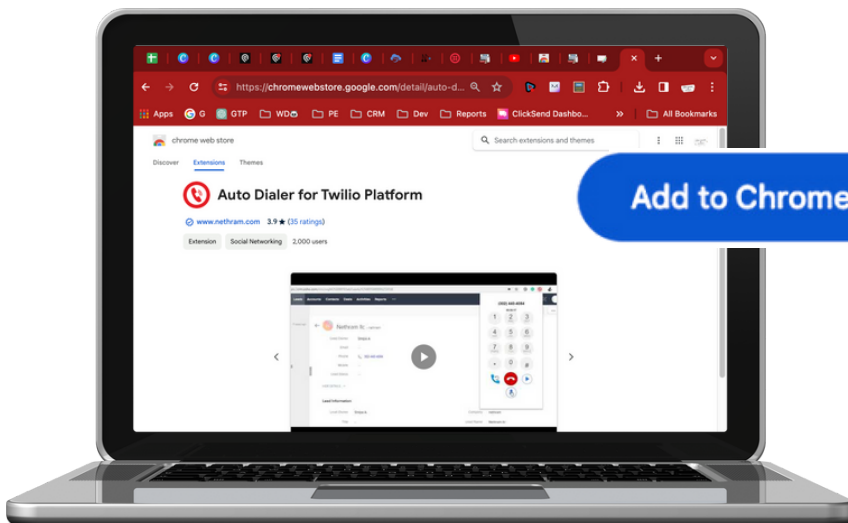


Your CRM comes with a FREE phone & local (state) number you can use for calls and SMS right from your apps.



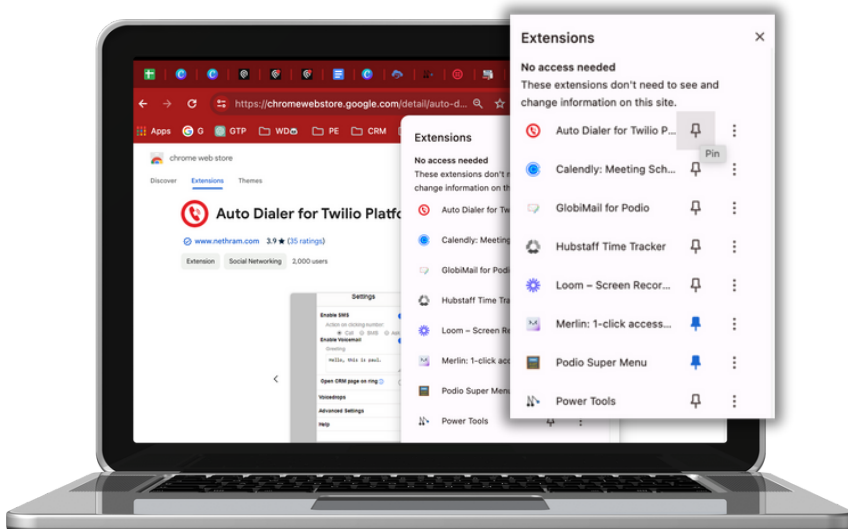
Download Google Chrome. Podio works much better with it and you will need it for extensions & plug ins such as this phone.

[google.com/chrome](https://google.com/chrome)



Go to Google Webstore (link below) and Click on **ADD TO CHROME.**

[google.com/chromewebstore](https://google.com/chromewebstore)



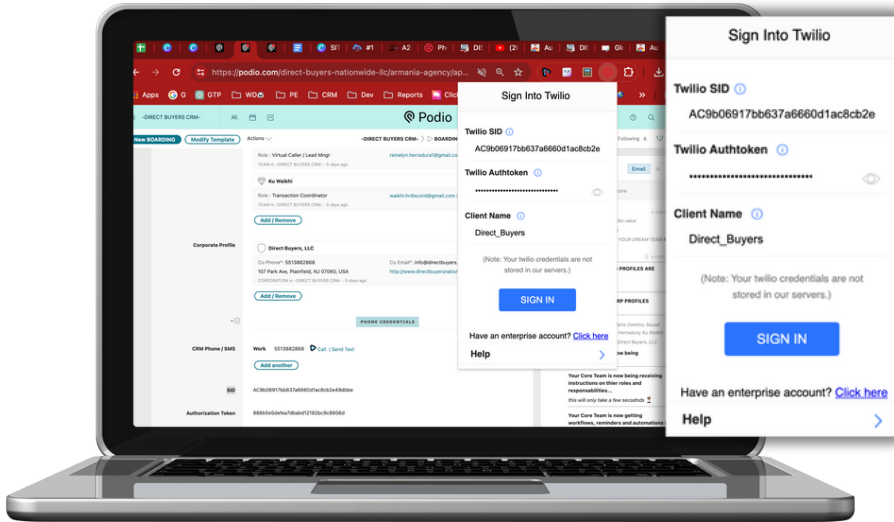
Your Phone Extension is now installed.

**PIN IT** by clicking on the puzzle piece next to the URL (top right).

Find the **AUTO DIALER FOR TWILIO** plug in and press the **PIN** next to it.

# YOUR PHONE & SMS

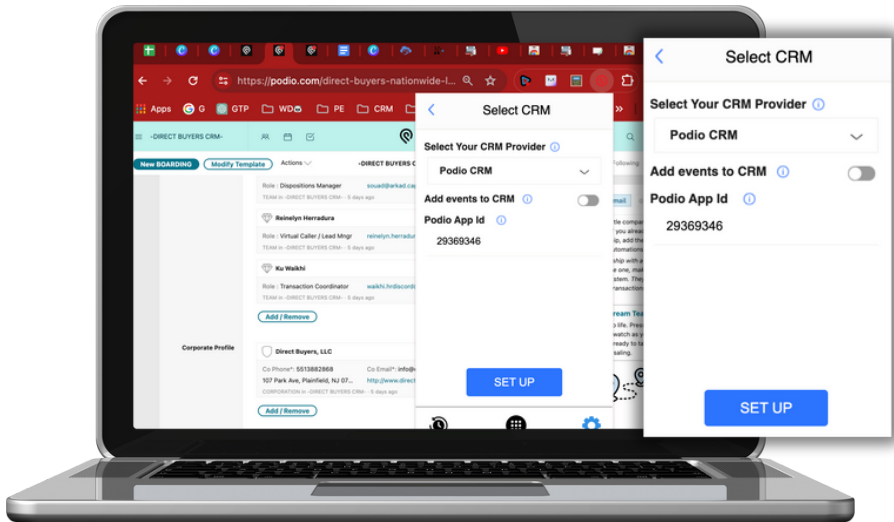
Your CRM comes with a phone & local (state) number you can use for calls and SMS right from your apps.



You will find your SID and Authorization Token in your **CONFIG APP** by the time you board.

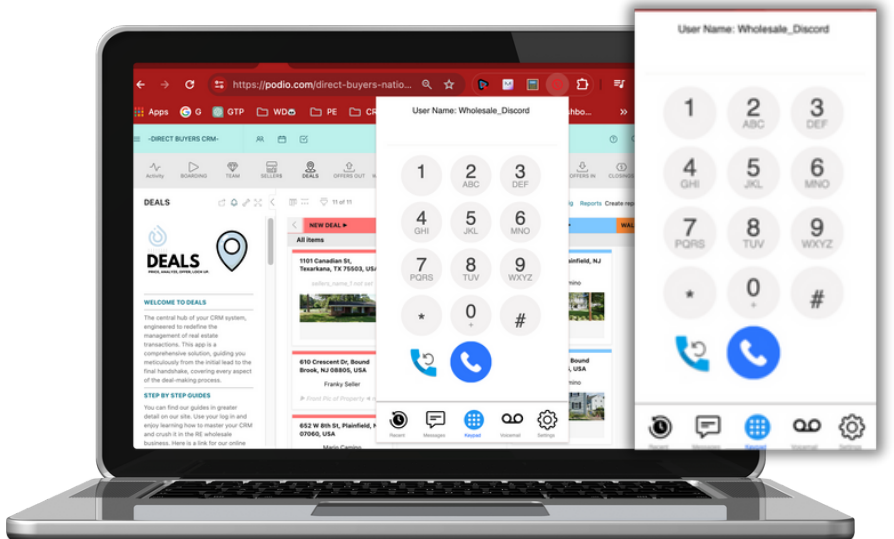
**Copy and Paste them into your Dialer**

**Click SIGN IN**



Select Podio CRM and Add the APP ID (sellers app).

This will allow for your crm to search and pull up the seller profile when they call.



**Your Phone is now ready. You can make and receive calls.**

Make sure you test it out a couple of times.



# 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

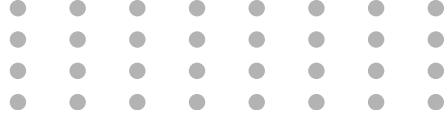
**NOTE:** The process will take 30 days before you can send individual or BULK SMS Campaigns

## 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
<b>Local Numbers</b>	\$5/number	\$4/number	\$3/number
<b>Toll Free</b>	\$6/number	\$5/number	\$4/number

<b>Calls</b>	<b>Cost Per Minute</b>
<b>Outbound</b>	\$0.015
<b>Inbound</b>	\$0.020

<b>SMS</b>	<b>Cost Per SMS</b>
<b>Outbound</b>	\$0.020
<b>Inbound</b>	\$0.020

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

# 6. YOUR CRM IS BEING BUILT

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

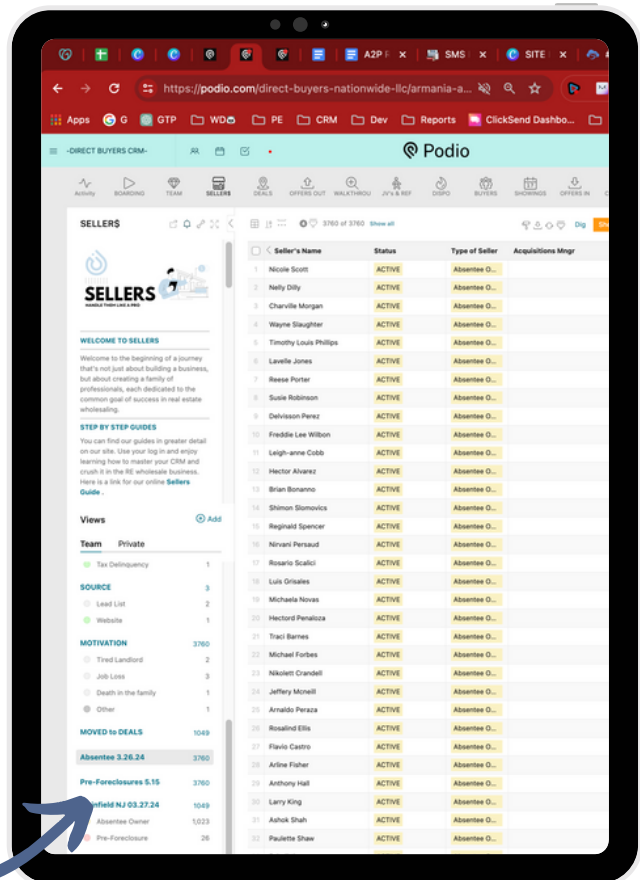


## YOU LEADS ARE BEING LOADED

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



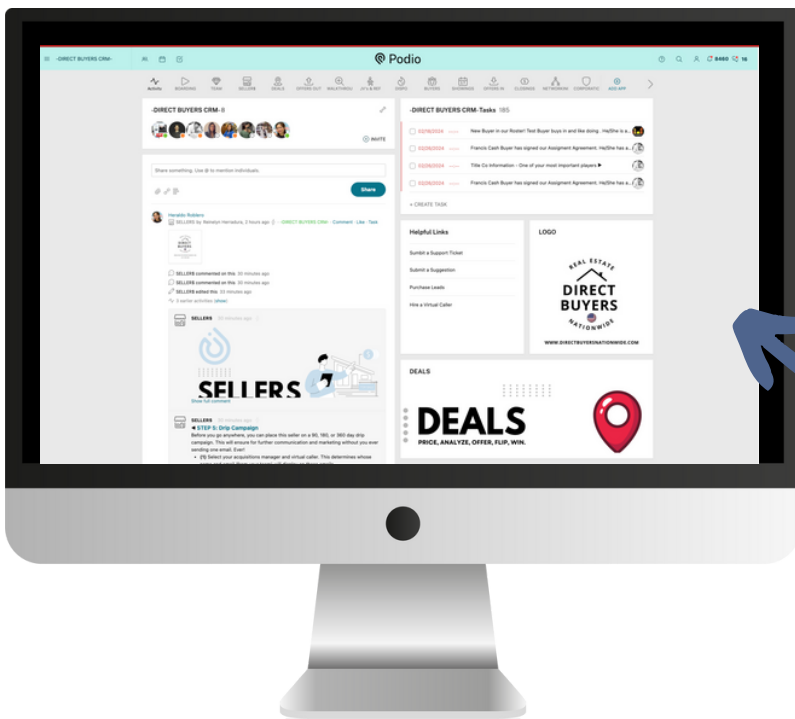
**COMPANY DATABASE IS ALSO BEING LOADED**

# YOUR CRM IS BEING BUILT

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



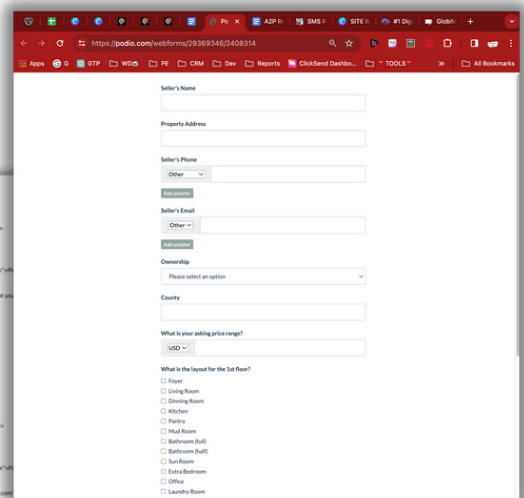
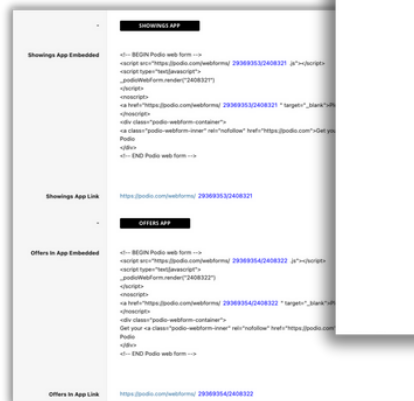
## YOUR DASHBOARD IS GETTING SET UP



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



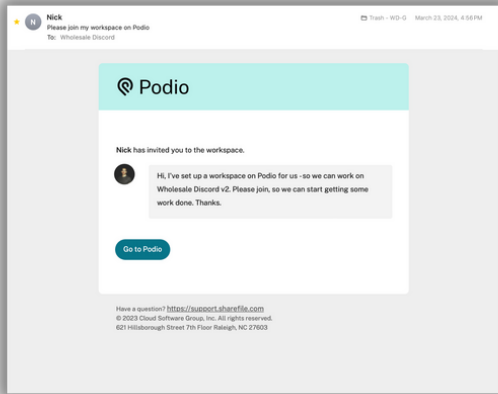
[www.wholesalediscord.com/crm-guides](http://www.wholesalediscord.com/crm-guides)

# 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.

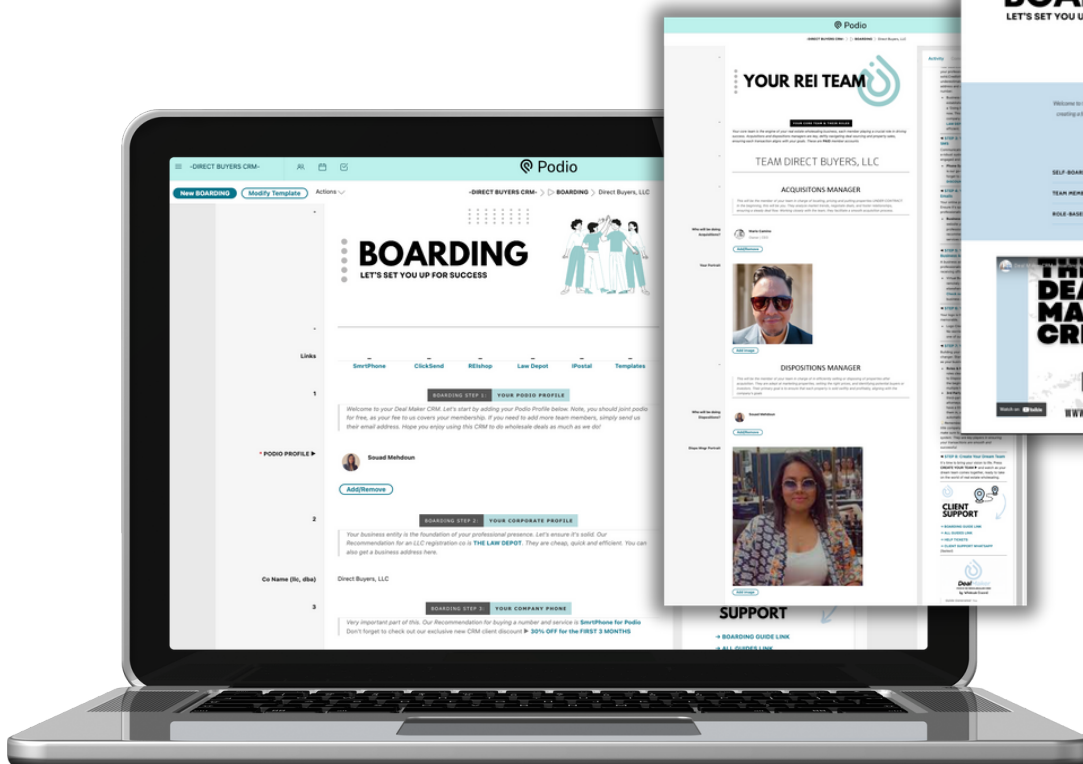


## INVITE & BOARDING



- 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!**

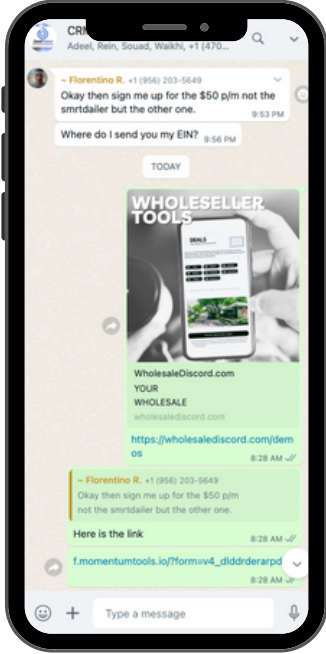
- Review [Boarding App Guide](#) on our site
- Go to your Boarding App in your CRM
- Create Your Team's Profiles and Roles
- Review the rest of your [ONLINE GUIDES](#)



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

# CLIENT SUPPORT

We are here and reachable in more than one way.

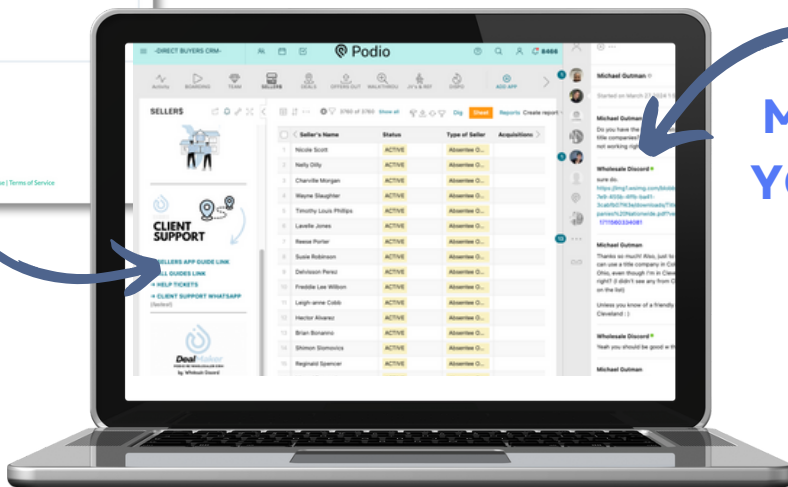
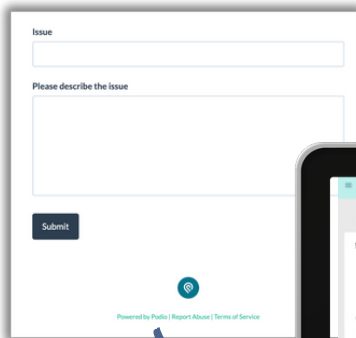


**CLIENT GROUP CHAT  
WHATSAPP**

**DEDICATED CHAT  
WHATSAPP  
OR TEXT**

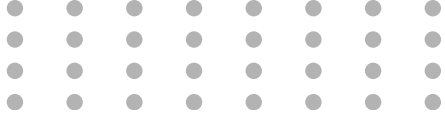


**HELP TICKETS  
FROM YOUR CRM**



**MESSAGE US ON  
YOUR CRM**

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

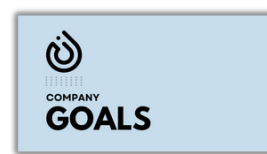
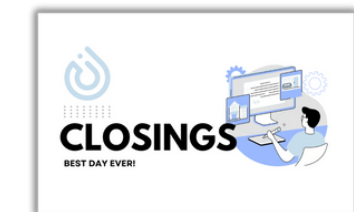
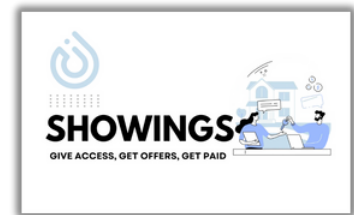
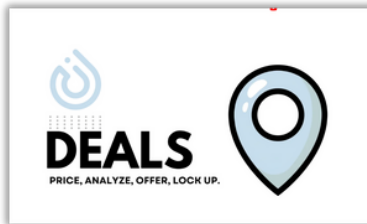
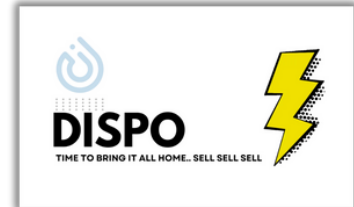


# APP GUIDES LINKS

## ACQUISITION APPS

## DISPOSITION APPS

### BOARDING APPS



### VIRTUAL OFFICE APPS