How To Enter Lenders Into Podio CRM
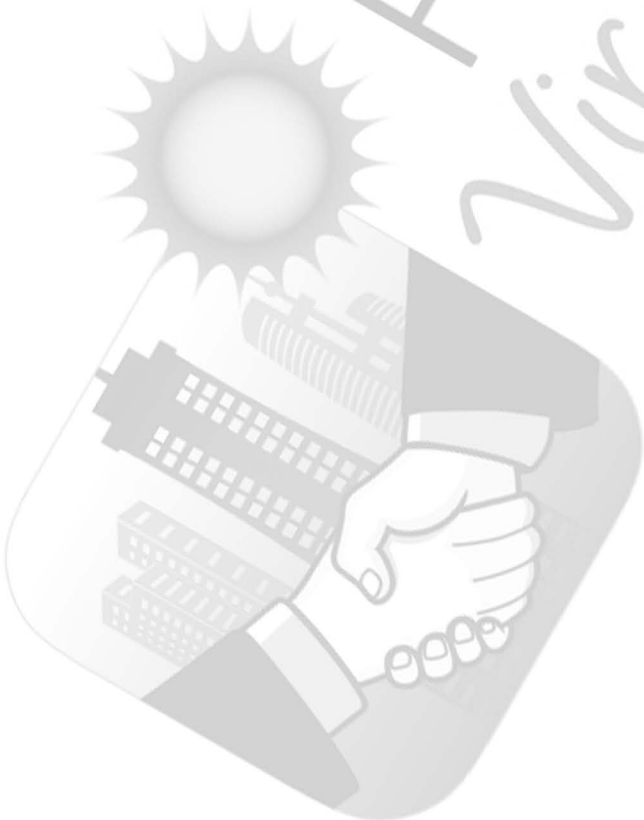
Standard Operating Procedures (SOPs)

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GENERAL OVERVIEW
Things You'll Need

You'll need a few things to get started:

ACCESS TO THE SPREADSHEET

Lender_List.xlsx - If you don't have this, get it directly from Marshall.

LOGIN FOR THE PODIO

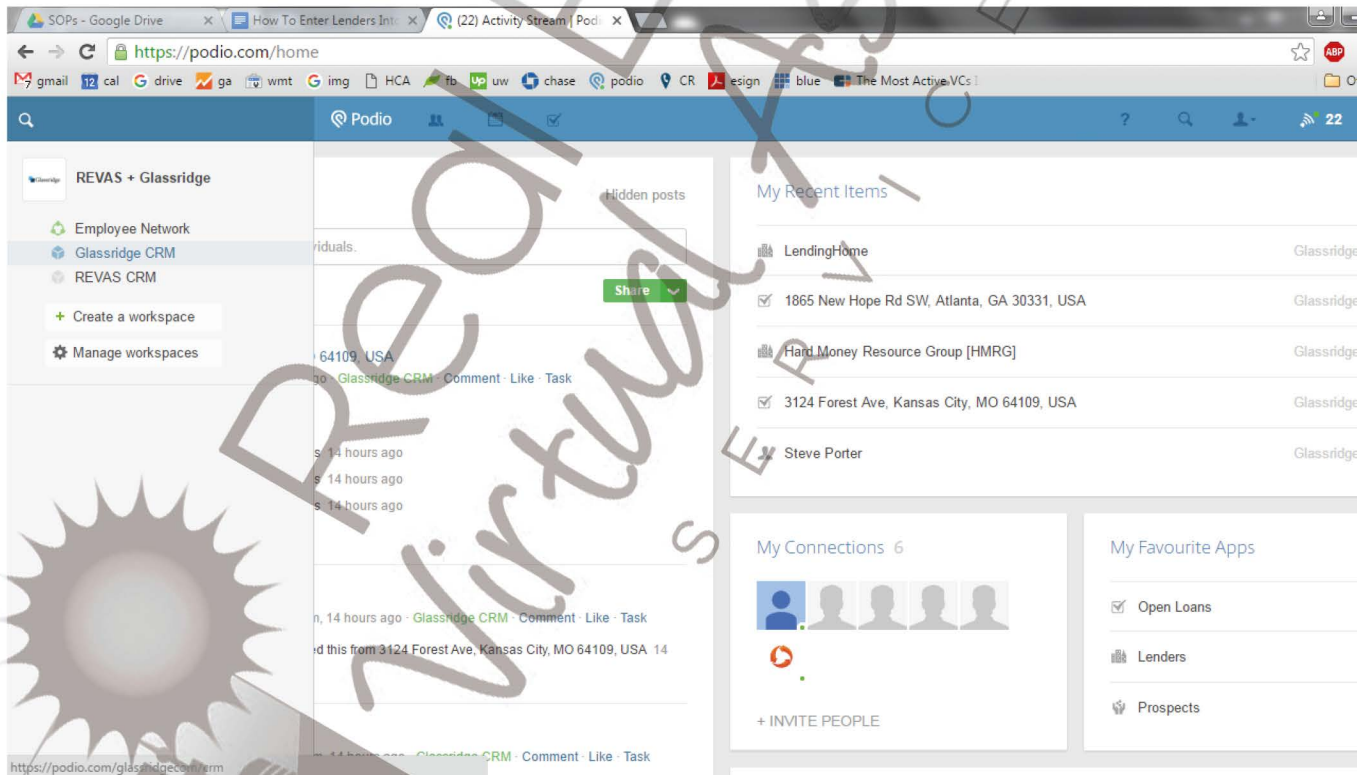https://podio.com/login

username [edited for privacy]

password [edited for privacy]
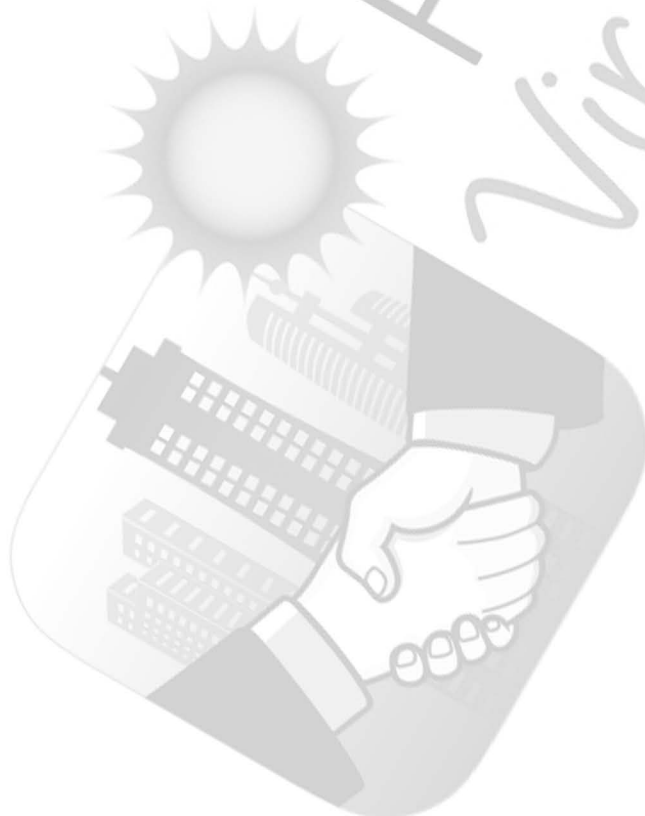
ENTERING THE LENDERS: STEP-BY-STEP

Logging In To Podio & Navigating to Lenders App

1. Once you're in the Podio, in the upper left area, click, and from the drop down, select "Glassridge CRM"

2. From the Glassridge CRM, click the "Lenders" app

3. From the Lenders App, select "Add Lender" (green button, right side of screen)