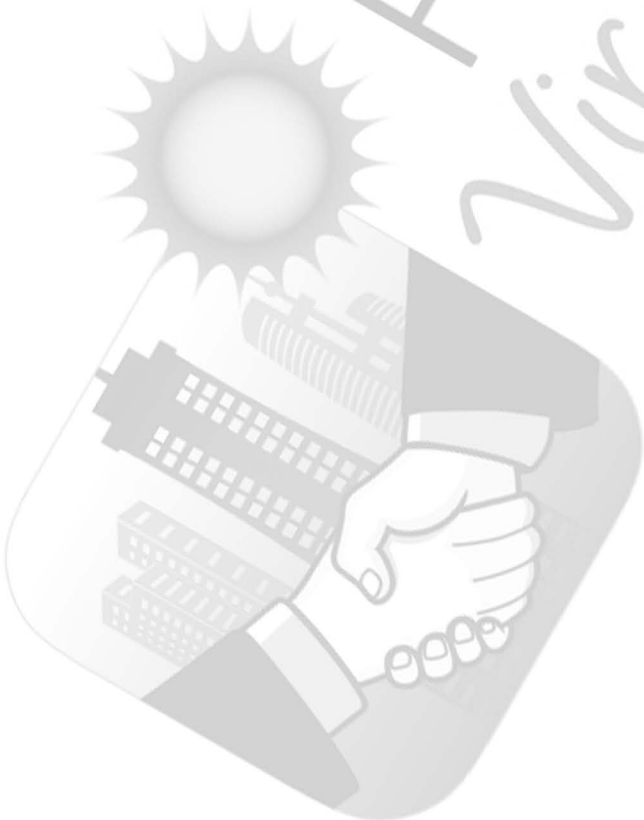


How To Enter Lenders Into Podio CRM

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

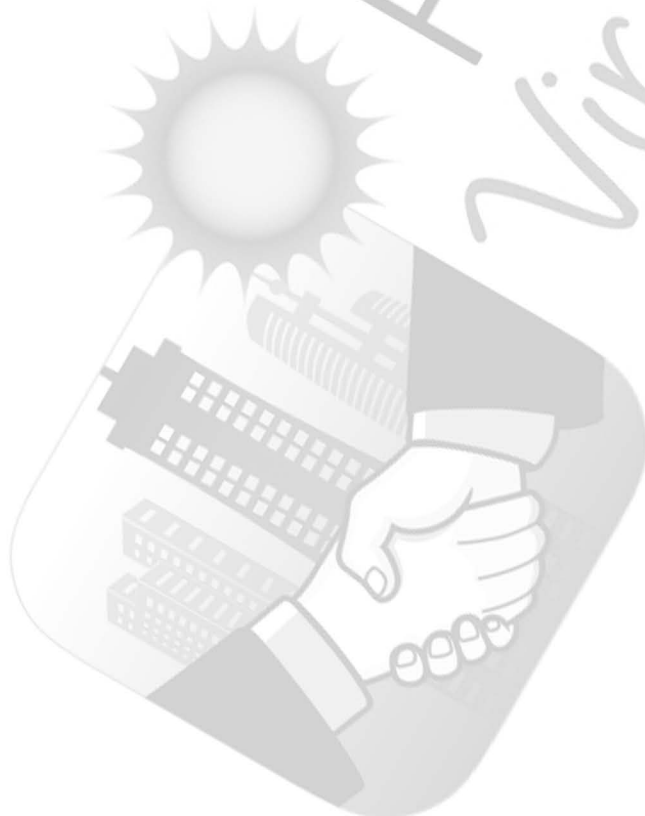
Lender_List.xlsx - If you don't have this, get it directly from Marshall.

LOGIN FOR THE PODIO

<https://podio.com/login>

username [edited for privacy]

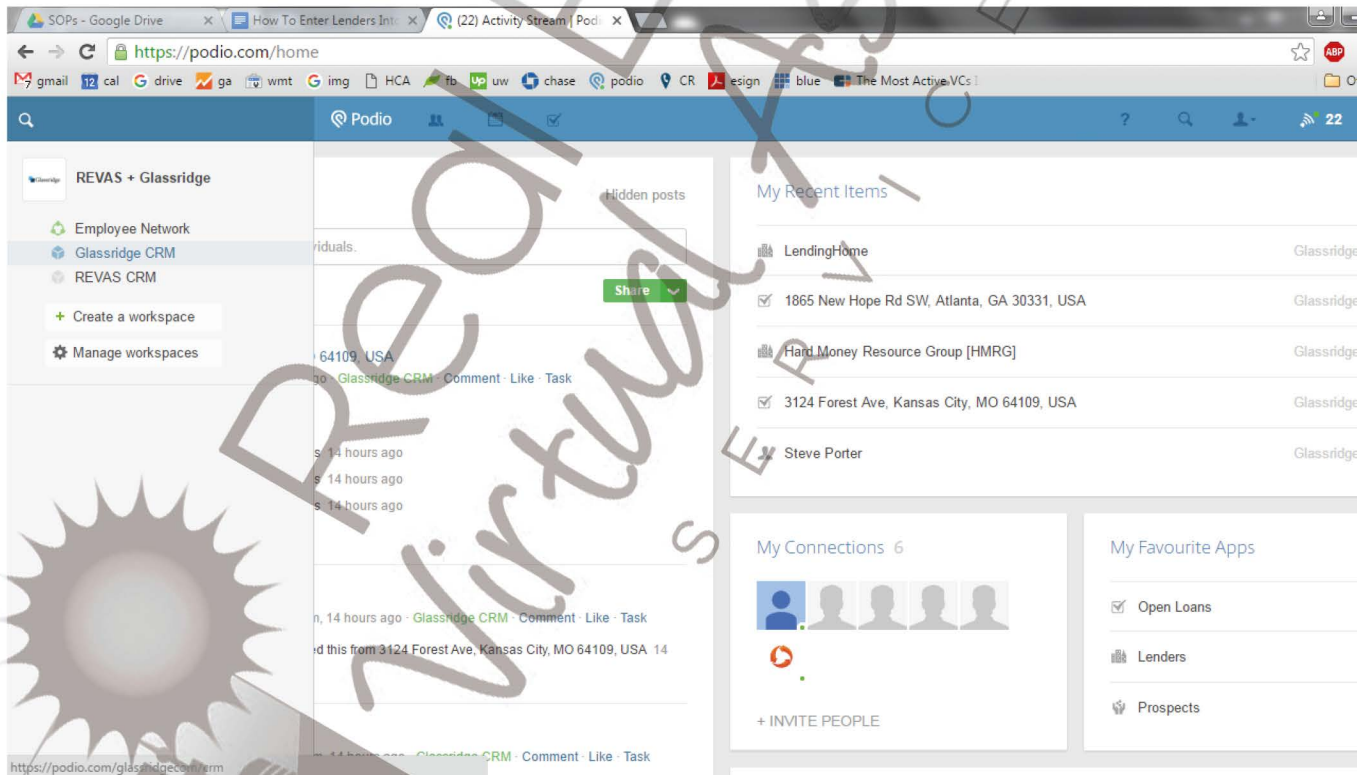
password [edited for privacy]



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"



Real Estate Virtual Assistant Services

Standard Operating Procedure (SOP) Sample



- From the Glassridge CRM, click the “Lenders” app

Company	Direct Contact	Broker	States They Lend In	Specialty Niche(s)
1 North Shore Funding Partners	Mike Williams	No	Nationwide	
2 Avatar Financial Group	Jason Homme	No	Nationwide	
3 B & T Development Group		No	Nationwide	
4 Island View Private Loan Fund	Malek Adair	No	Nationwide AZ CA NV OR	
5 Hard Money Resource Group [H]	Steve Porter	No		
6 CIVIC Financial	Jackelyn Gonzalez	No	AZ CA WA FL OR TX CO	
7 Barnett Capital	Mythili Gopikanth	No		
8 Jordan Capital Finance, LLC	Douglas Liphardt	Yes		
9 LendingHome	Adam Meek	Yes	CO CT GA TN TX WA W	
10 RCN Capital	Jeff Mallas	Yes		
11 Visio Financial Services	Tyler Browne	Yes		

- From the Lenders App, select “Add Lender” (green button, right side of screen)

Company	Direct Contact	Broker	States They Lend In	Specialty Niche(s)
1 North Shore Funding Partners	Mike Williams	No	Nationwide	
2 Avatar Financial Group	Jason Homme	No	Nationwide	
3 B & T Development Group		No	Nationwide	
4 Island View Private Loan Fund	Malek Adair	No	Nationwide AZ CA NV OR	
5 Hard Money Resource Group [H]	Steve Porter	No		
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7 Barnett Capital	Mythili Gopikanth	No		
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