

## Welcome to the CRM for MasterPLAN Outdoor Living

This CRM has been built by MasterPLAN Outdoor Living to keep the bidding process clean and simple. Here, you will receive projects to bid from MasterPLAN, along with supporting documents and pictures. Emails and interactive discussions about the projects will also live within this CRM, so everything is kept all in one place. No more searching through your emails to find specific project information! Below, please find a short picture tutorial showing the steps in the bidding process within the CRM. If you have any questions, please don't hesitate to call Josh or Becky in the MasterPLAN office, 610-628-2480.

1. Your profile will be created by MasterPLAN, and you will receive an email welcoming you to the system and showing you your username and the initial password created for you. You will be able to change this password after your first sign in.

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MasterPLAN Specialist Registered Inbox x

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 MasterPLAN@server314.com  
to me ▾



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Dear John,

Congratulations! You are now registered with MasterPLAN's Project Management System.

Your personalized login information:  
Username: johnsmith  
Password: Landscape1234

Bids, questions and communications for all projects will be done by logging into the system @ <http://crm.masterplanlandscapedesignpa.com/>. You will be invited to bid on projects via the email address in your profile.  
Welcome aboard!

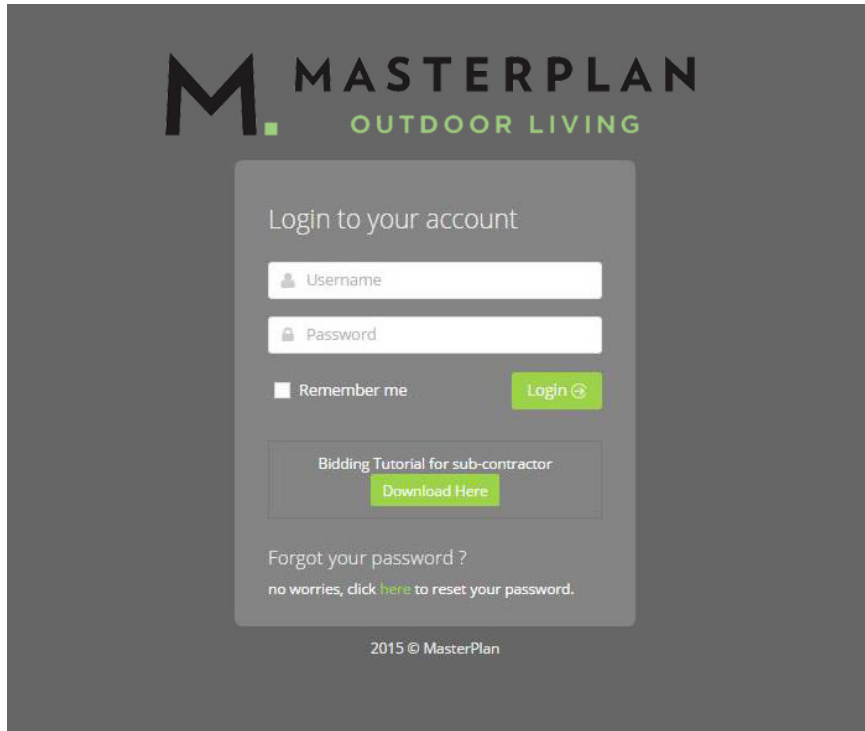
Sincerely,  
The MasterPLAN Team

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 Click here to [Reply](#), [Reply to all](#), or [Forward](#)

- By clicking the link in the welcome email, you will be brought to the sign in screen where you should enter your username and password.



- Once logged in, you will see the Dashboard that contains all of your bids, along with release date, bid deadline and status. (You will also receive an email inviting you to bid each project that is sent to you, so you are aware that a bid is waiting for you in the CRM).

The image shows a dashboard header for MasterPlan Outdoor Living with navigation links for 'Bids' and 'Messages'. Below the header is a table titled 'Bids'. The table has five columns: Client, Project Name, Released, Deadline, and Status. One row is visible with the following data: Client: Mary Johnston, Project Name: Sample Backyard Renovation, Released: 08/14/2015, Deadline: 08/21/2015, Status: Not Submitted.

Client	Project Name	Released	Deadline	Status
Mary Johnston	Sample Backyard Renovation	08/14/2015	08/21/2015	Not Submitted

- By clicking on the Client's name, you will be shown the Bid Package Detail. If you click on the RFP on the right hand side, it will open the bid with all details and pictures of the project.

#### LANDSCAPE MATERIALS

Square foot of Groundcover to be installed: *	<input type="text" value="3700"/>	Square foot of Mulch to be installed: *	<input type="text" value="3700"/>
Mulch Color: *	<input type="text" value="Dyed Brown"/>	Square foot of Stone to be installed: *	<input type="text" value="over groundcover"/>
Approx. length of bed edge to be edged (lineal foot): *	<input type="text" value="225"/>	Stone Type / Size: *	<input type="text" value="N/A"/>
		All beds will be built up with this many inches of screened amended soil: *	<input type="text" value="2-4"/>

#### STEPPING STONES & CURBING

#### DOWNSPOUTS

# of Downspouts to address: *	<input type="text" value="2"/>	Length of each downspout ( Approx ): *	<input text"="" type="text" value="No difuser or pop-up, just run it c"/>
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#### MISC NOTES

Grade, seed & install Penn-mulch in the lawn area disturbed during project: *	<input type="text" value="No"/>	Spade all new bed edges: *	<input type="text" value="Yes"/>
		All removed plant material will be taken offsite: *	<input type="text" value="Yes"/>

#### RFP Files

[Download All](#)

				
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5. After reviewing the bid, there is a question bar at the top of the page asking if you will bid this project, click yes or no.
- If you are bidding the project, you should then type in your bid amount in the Amount field.
- Be sure to also attach your company's bid by clicking the "Attach Files" button.
- When you are ready to submit your bid, click the blue button that says "Submit Bid" and it will alert MasterPLAN that you have bid the project.

**MASTERPLAN**  
OUTDOOR LIVING

Will You bid for this project?

[← Back](#)

Bid Package Detail

[← Sub-Contractor Detail](#) Bid Pending

[Submit Bid](#)

Title:	Landscaping RFP	Client:	Mary Johnston
Address:	1234 White House Drive, Jim Thorpe, PA 18229	Released:	08/14/2015
Project Name:	Sample: Backyard Renovation	Viewed:	-
Will Bid?:	null	Submitted:	-

Attached File(s): [Add Files](#)

Amount: \$

Internal Notes

comment...  
[Send](#) [Cancel](#)  
There are no discussions on this t

Sample: Backyard Renovation

\*Take note to the Internal Notes section. If you have anything pertaining to the project that you need MasterPLAN to know, type it in this field.



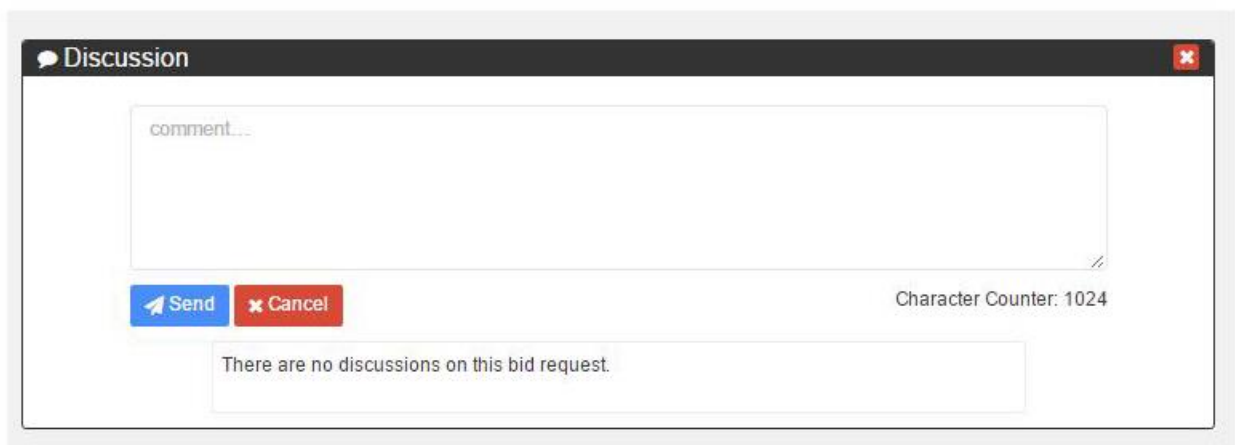
Attached File(s): [+Add Files](#)


 Landsca  bid.docx 

Amount: \$



Internal Notes

\*Also, on this same page, is the Discussion section. If you have a question or need to have an interactive conversation about this project, this is where you would discuss the issue.



Discussion 

comment...

  Character Counter: 1024

There are no discussions on this bid request.

6. If you have been awarded the project, you will receive an email alerting you of this.

MasterPLAN Project Awarded! Inbox x



MasterPLAN@server314.com

to me ▾



Dear John,

The Johnston Residence Sample: Backyard Renovation project has been awarded to you. Click this [link](#) and log in to view project details or to submit questions to MasterPLAN. We look forward to working with you on this project!

Sincerely,  
The MasterPLAN Team

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You have now completed your Bid submission!  
If you run into any problems, please notify MasterPLAN right away. Thank you!