



SURVEYPRO USER GUIDE

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1. Get the app

SurveyPro will help you create a Pre-Move Survey easily, it includes items, boxes, addresses, dates, photos, checklists, photos and much more.

SurveyPro is available for iOS and Android devices.

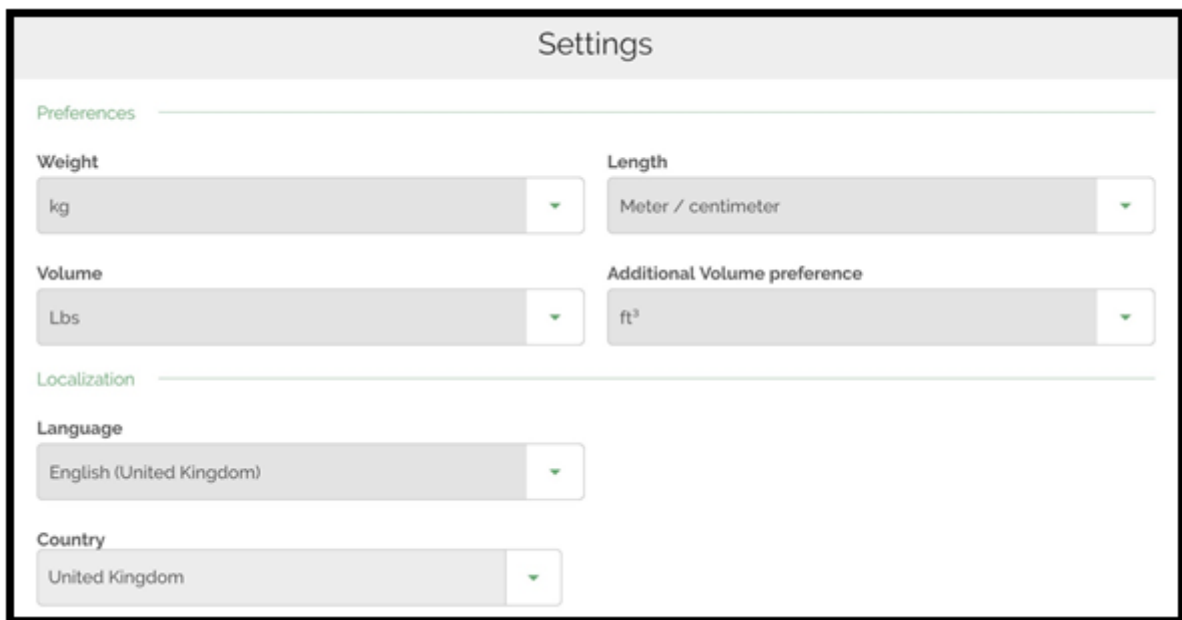
Once you have downloaded the app, you'll need to input your license. You can view your license in the MoveDashboard. **Company Settings > Solutions > ProApps > Licenses**

Once you have input your license in the app, you'll have the SurveyPro dashboard in front of you. On this screen, the app displays here all **tasks** assigned to you.

What's a **task**? A file that you have received on your device through which you will create a pre-move survey.

When you first download the app, you may not see any tasks on your device. You can create one from scratch by tapping **Add Task**. If you were assigned a task, you can place your finger on the middle of the screen, pull down and release. This updates the screen.

On the top left corner, there's a 3 stripes icon. This opens a menu to navigate within the task and has a shortcut to our **Support Portal** and your app **Settings**.



Within your settings, you can adjust the measurement units and language. Now that you have the app in the preferred language and using the right units, let's talk about the offline mode.

The app works offline and online. However, if you're planning to work offline, you must download the task first. You can do this by swiping the task to the left, and tapping on download. This prompts the option to download the file. If the task was downloaded successfully, you will have a black dot on the left side of the task. If you go offline and did not download the task, the task will

disappear from the device until you come back online. We do this so the device doesn't get cluttered with files that are not going to be used anytime soon.

If you create a task while online, this task will retrieve and make available for use the following: Inventory list, walkthrough questions and services. These are not available for those tasks created while offline. If a task is assigned to you from the MoveDashboard or other move management system, these inventory list, services and walkthrough questions will be available for you.

In most of the cases, you will be working with tasks assigned from the MoveDashboard or other Move Management System..

2. Task Summary

Starting from the top left corner, **Type**, in this case this is a survey task, the number below refers to this move or shipment number. SurveyPro is only used for surveys, there are no other types of tasks you can have within this app. We decided to display the task type regardless as there are some dynamic users out there that use both CrewPro and SurveyPro, so these will know which is which.

Task comment, empty here, but you may have some text there in the future. This text comes from the Move Coordinator. When a Move Coordinator schedules a task, they have the option to leave a comment here for the person that is going to carry the task. This comment is not displayed on any of the documents.

Customer displays the transferee's full name and email.

Inventory list, in this case it reads Move4U Inventory list. This means the task will use the Move4U inventory list. This was preselected by the Move Coordinator's company. Each company has a selected list to work with. This list can change on company basis. Move4U is currently working to offer the option for the Move Coordinator to select different lists when scheduling the task.

Date refers to the date and time that was scheduled for this task.

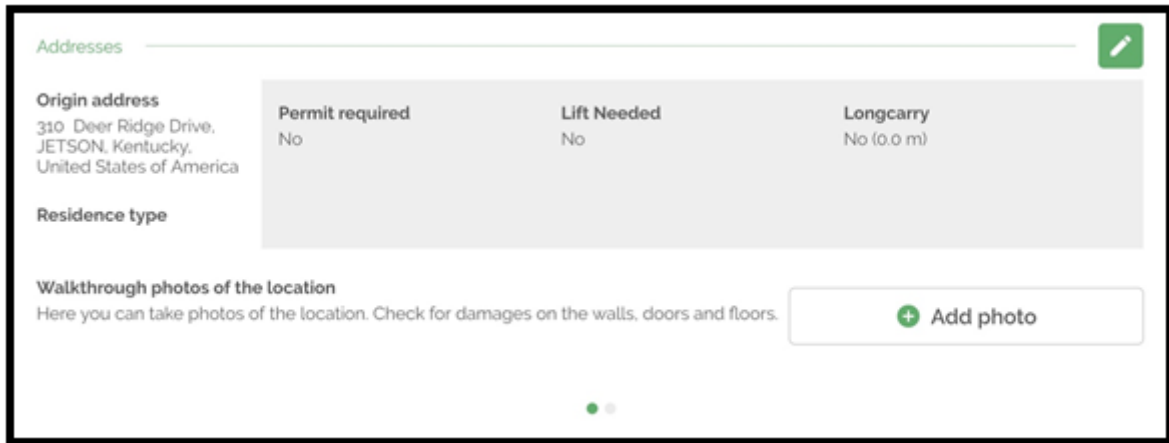


Task summary		
Type	Customer	Date
Survey M4UT-20-000960	Mr. Mike Thompson Mike@Cooperation.com	11/6/2020 1300
Task comment	Inventory list	
	Move4U Inventory list	

3. Addresses

At the top right corner, we have the **Pen Icon**, as you will see throughout the app, this indicates the option to open this section for further edits. What is displayed in the screenshot below is the origin address. If you swipe on it, you will see the destination address.

Below there's an **Add Photo** button. It's used for a couple of things. Let's say you noticed a damage on a wall, floor, or you need some photos of the parking area. You can take a photo or use one from your gallery/album and draw on the photo if desired.



If you tap the Pen Icon, you will view all addresses within the file. You have the option to view more details or adjust them.

Within each address you can find parking info, lift info, and comments written by the move coordinator or fill them in yourself.

You are able to add multiple addresses for any purposes. An important note here, if you plan to move items to a warehouse first, you can add the warehouse address as a destination and when you add the item to the pre-move survey, you can select that warehouse as the destination for the items.

4. Walkthrough

This section will present you questions. This is intended to work as a checklist. Each company can associate a set of questions to a task type. When the surveyor, packer or driver opens the task, they will see the questions and check Yes or No and may leave a comment.

You can swipe on this question to view other questions or tap View all on the top right corner to view all the questions in one glance.



You can customize this section in the Move Dashboard following this route:

Company Settings > Solutions > ProApps > Questions


5. Information

In this section we have a larger overview of the contact and move information. Some points that may be confusing:

- Under Language, it reads De. That refers to the language preferred by the transferee. In this case it's German.
- Under Order, we have Road, Air, Sea, and Storage. These are the allowances for this move.
- Under Extra, General comment, it reads VIP. This is a comment typed by the move coordinator.

Tap the Pen Icon on the top right corner to edit or view more information. Once opened, you can view **billing information** if this was added at some point.

At the bottom of the section, there's a **Sales** text field and **General info** text field. Sales text field is displayed in the documents. General info text field will not be displayed in the documents, it will be visible by the Move coordinator in the MoveDashboard.

Information 

Client

Number M4UT-20-000960	External reference N/A	Unique shipment number(s)
Name Mr. Mike Thompson	Email addresses Mike@Coorporation.com	Phone numbers 973-603-9144, 502-598-7798
Client address 310 Deer Ridge Drive	Family 2 Adults, 2 Children, Dog	Language de

Order

Service Type Door to Door	Status Already booked	
Road 2472.05 lbs	Air 0.0 lbs	Sea 0.0 lbs
Storage 1235.99 lbs		

Extra

General comment
VIP

6.Planning

In the Planning section you can take note of the preferred dates for packing, loading, shipping and unloading. You can select a range of dates or a single date and add a comment to each. Tap the Pen Icon to start adjusting this section.

The screenshot shows a mobile application interface titled "Edit Planning". At the top left, there is a back arrow and the text "< Back". The title "Edit Planning" is centered at the top. Below the title, the word "Packing" is displayed in green. A table with three columns is shown: "Type", "Date", and "Time of the day". The first row of the table has the following values: "Period", "Nov 6, 2020 - Nov 6, 2020", and "Morning". To the right of the table, there are two green icons: a pencil (edit) and a trash can (delete). Below the table is a text input field with the placeholder text "Enter comment". At the bottom center, there is a green button with a white plus sign and the text "+ Add preference".

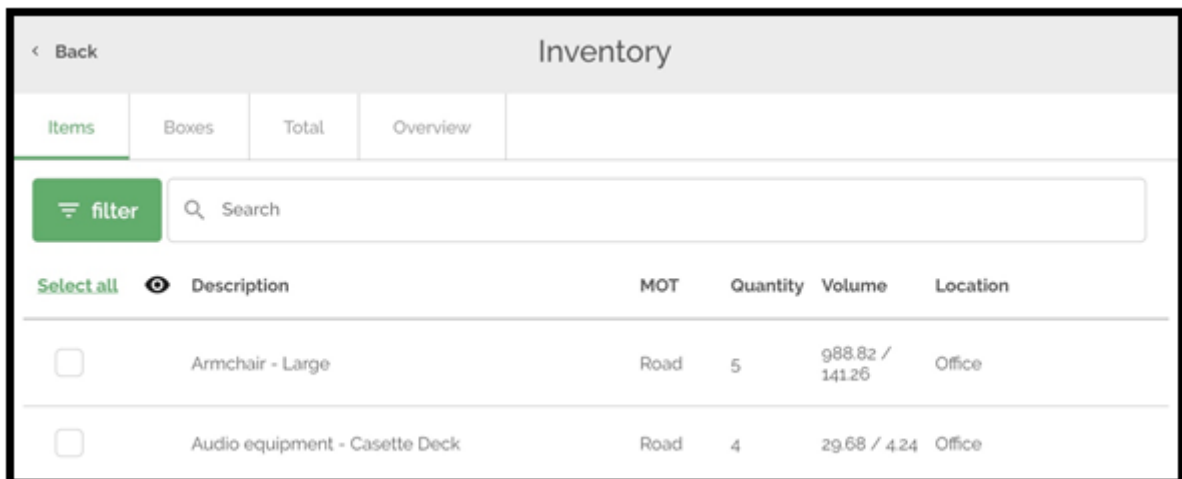
Type	Date	Time of the day
Period	Nov 6, 2020 - Nov 6, 2020	Morning

7. Pre-move survey

At the top, we have the following tabs: Items, Boxes, Total, and Overview.

In this app we make a distinction between **Items** (Furniture, appliances, etc.) and **Boxes** (box of clothes, decoration, etc.). In the **Total** tab the app displays them together, and **Overview** presents a breakdown of the items and boxes added per room.

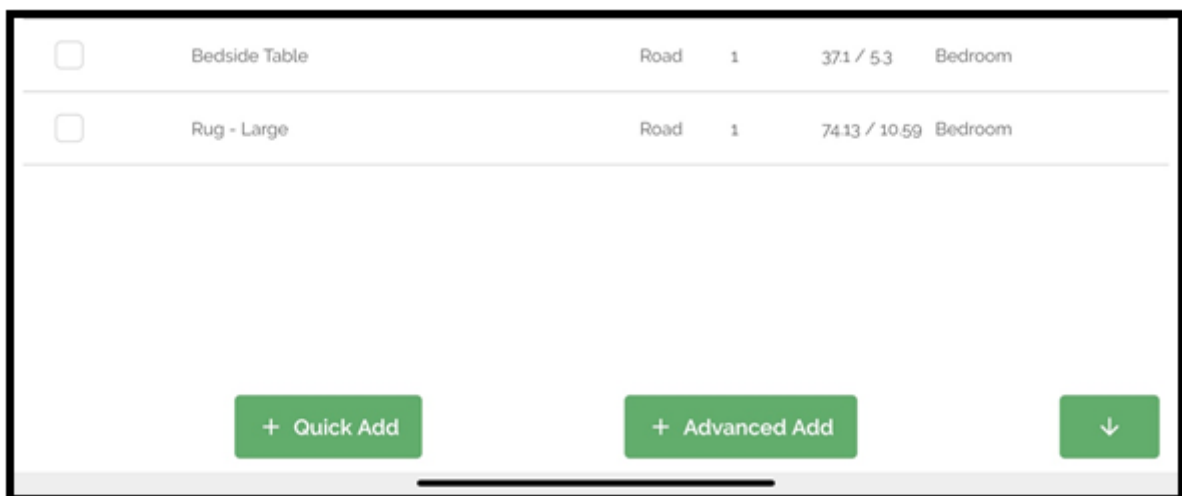
Below there's a filter (you can filter items and boxes based on the location, room, MOT, destination and other characteristics).



The screenshot shows the 'Inventory' screen with a 'Back' button and four tabs: 'Items', 'Boxes', 'Total', and 'Overview'. The 'Items' tab is active. Below the tabs is a green 'filter' button and a search bar. A table lists items with columns for 'Description', 'MOT', 'Quantity', 'Volume', and 'Location'. The first item is 'Armchair - Large' with MOT 'Road', Quantity '5', Volume '988.82 / 14126', and Location 'Office'. The second item is 'Audio equipment - Casette Deck' with MOT 'Road', Quantity '4', Volume '29.68 / 424', and Location 'Office'. A 'Select all' button is visible on the left.

Select all	Description	MOT	Quantity	Volume	Location
<input type="checkbox"/>	Armchair - Large	Road	5	988.82 / 14126	Office
<input type="checkbox"/>	Audio equipment - Casette Deck	Road	4	29.68 / 424	Office

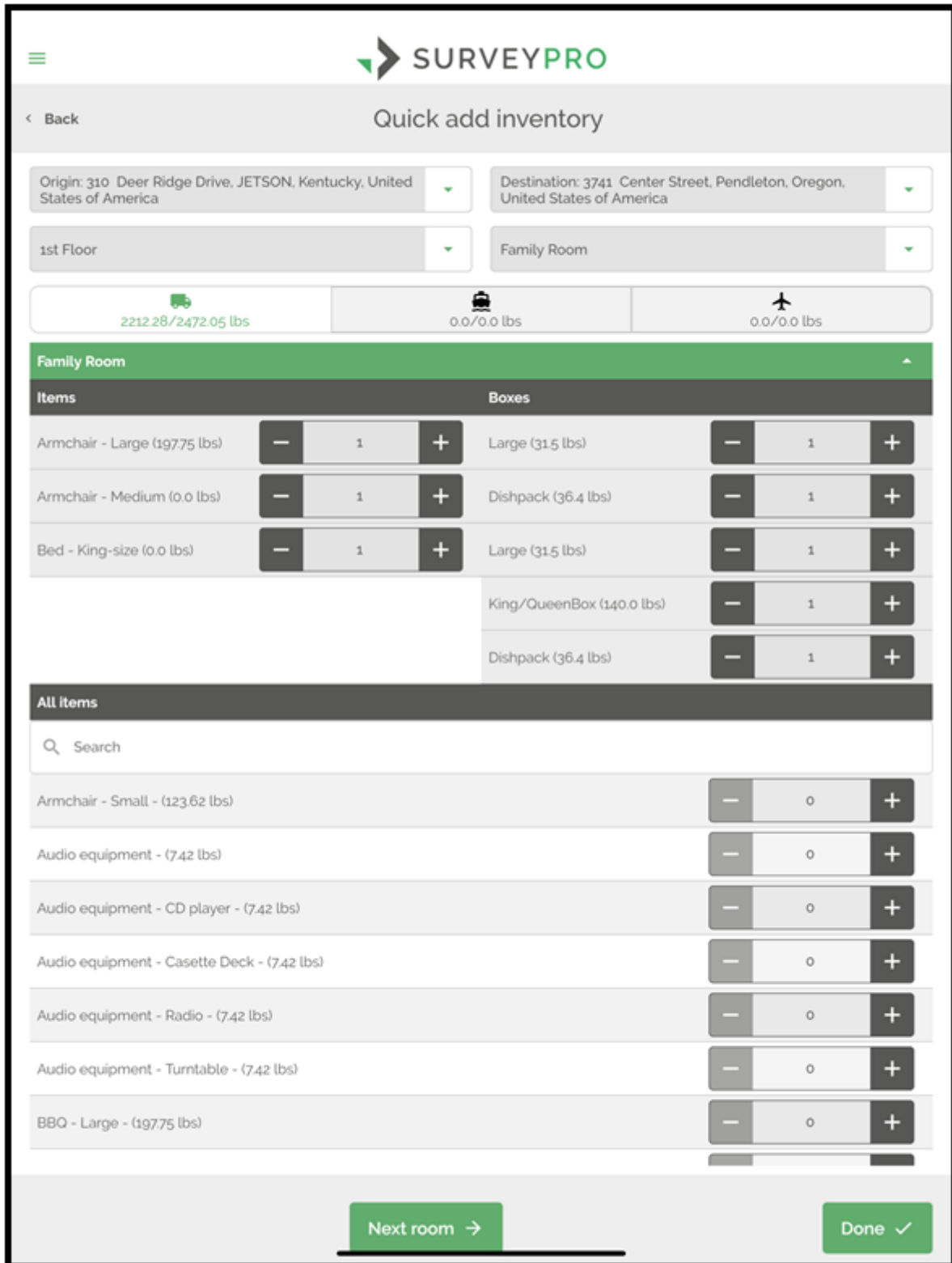
At the bottom of the screen, you can find Quick and Advanced Add. Use any of these 2 buttons to add items and boxes.



The screenshot shows the bottom portion of the inventory list. The first item is 'Bedside Table' with MOT 'Road', Quantity '1', Volume '371 / 53', and Location 'Bedroom'. The second item is 'Rug - Large' with MOT 'Road', Quantity '1', Volume '7413 / 10.59', and Location 'Bedroom'. At the bottom, there are three green buttons: '+ Quick Add', '+ Advanced Add', and a downward arrow button.

<input type="checkbox"/>	Bedside Table	Road	1	371 / 53	Bedroom
<input type="checkbox"/>	Rug - Large	Road	1	7413 / 10.59	Bedroom

Within the MoveDashboard, a company is able to set up **Room Templates**, these templates are pre-sets. The bedroom has a bed x1, lamp x2, wardrobe x1, rug x1. Once the template is ready, the app can use that information through **Quick Add**.



This way, the surveyor selects the floor, and chooses the room template, this loads all the preselected items and quantities. Once you are satisfied with the room, tap Done on the bottom right corner to add the items and be returned to the Inventory overview. Tap Next room to add another room.

If you want to add an item that is not present in the room template, scroll down and you will see a search bar, use it and add items to the template.

If you want to change the volume or add any other specification for the item/box, you can do this after adding the item. The concept behind Quick Add is to add items quickly without many screens.

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< Back Add inventory item

Origin: 310 Deer Ridge Drive, JETSON, Kentucky, United States of America Destination: 3741 Center Street, Pendleton, Oregon, United States of America

1st Floor Family Room

2212.28/2472.05 lbs 0.0/0.0 lbs 0.0/0.0 lbs

Items Boxes

Armchair - Medium

Select packing type Sofas and chairs

Transport

1 amount 148.33 lbs 148.33 lbs 21.19 cuft

Packing

High value / High risk Damaged

Crate Disassemble

Packed by owner Disassembly by owner

Extra

Not going Maybe

Electrical Select M-Pro/Ocie/PBP&E

Enter general comments here

+ Next item Save ✓

Advanced Add does not use templates. Through this button, you're able to select the floor, room, and the MOT. Below you'll see the search bar, use this to find an item or box. Select on the item by tapping on it. Once you are satisfied with the room, tap Done on the bottom right corner to add the items and be returned to the Inventory overview. Tap Next item to add another item.

At the top of the list of items that the search bar displays, you'll notice one that reads "**New Item**". Tap on it to add a new item, you will be able to name it and give it a volume. This item will be available only through this survey. If you require an item or box to be permanently added, you'll need to add it through the MoveDashboard.

The screenshot displays the 'Add inventory item' interface. A modal window titled 'Create new item' is overlaid on the main form. The modal contains two input fields: 'Edit name' and 'Edit volume'. The 'Edit volume' field is pre-filled with '2.45' and has a unit selector set to 'lbs'. Below the modal are 'Cancel' and 'Add item' buttons. The background form includes a 'Back' button, origin and destination address fields, floor selection (1st Floor and Basement), and weight indicators for items, boxes, and a truck. At the bottom of the screen, there are '+ Next item' and 'Save ✓' buttons.

After you have added an item, you can always tap on it to adjust its details. You can also select multiple items and tap Edit Items to adjust details in bulk.

8. Email client summary

Tap the Pen Icon to open the section. Here you can type the name and email address of someone who needs to view the pre-move survey right away. You can also adjust the language for this document and specify whether this recipient should be able to view the volume.

Email Packing List

Configure email

français

Email a copy of the summary to:

Name	Email	Language	Show Volume
Tom Lawrence	Tom@acme.com	French	Yes

Add recipient

First Name Last Name Email address Show Volume

+ Add recipient

The email with the document attached is sent only after you have finalized the task.

9. Services

In this section the app presents a list of services.

It mainly texts with a checkbox and comment field next to it. The list of services from the MoveDashboard, where the company establishes what should be available.

The services that end up being chosen within the pre-move survey will be displayed in the Client Summary PDF.

Edit services

Insurance for your move Enter comment

Furniture: Packing Enter comment

Boxes: Packing Enter comment

Boxes: Unpacking Enter comment

Furniture: Assembly Enter comment

10. Signatures

The app offers a dedicated section to capture the signature of the surveyor and customer. This is not mandatory. The signatures will be displayed in the documents.

The screenshot shows a mobile application interface for capturing signatures. The title bar at the top is labeled 'Signatures' with a back arrow on the left. Below the title, there is a section header 'Signatures'. The interface is split into two columns: 'Client' and 'Surveyor'. Each column has a 'Name' input field and a 'Remark' input field. The 'Client' name field contains 'Joe', and the 'Surveyor' name field contains 'Your name'. Below the input fields are two large rectangular boxes for signatures. The left box contains a handwritten signature 'SJE' and a 'Clear signature' button. The right box contains a handwritten signature 'YN' and a 'Clear signature' button.

11. Finalize

Once you are satisfied with the task information, tap the Finalize button.

All the information in the task will be locked and sent to the MoveDashboard and then to the Move Management System. As a user, you will be able to access the task through the Previous task section however, you will only be able to view the file. To adjust any information, you will require the task to be assigned back to you or the adjustment should be done through the Move Dashboard.

Here is a sample of the current packing list document. Beware this document is going through some changes these days.