CREWPRO

USER GUIDE

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An Introduction...

CrewPro is a powerful and user-friendly application designed to streamline the moving process. Whether you're conducting, packing, or managing deliveries, CrewPro simplifies your workflow and enhances efficiency.

Cross-Platform Supported

CrewPro is available on both iOS and Android devices. The user experience is identical across both operating systems, ensuring seamless use regardless of your device. This consistency is supported by the latest technology from Google, providing a robust and reliable performance.

Highly Personalizable

CrewPro is personalizable, offering each user a personal and individualized experience. You can tailor the app to suit your specific needs and preferences, making your workflow more efficient and effective.

> **Note:**
> It is good to know that the CrewPro uses the native capabilities of the mobile for both IOS and Android, such as but not limited to swipe, long tap etc.

Let's get started!

1. Download the App

CrewPro is available on IOS and Android devices and can be downloaded here:

- IOS

- Android

2. Activate your license:

You will receive unique login credentials from the Move4U Customer Success team for your individual license. Your e-mail address, in combination with your activation code, is required to login to the app.

Note: If you have not received or have misplaced your login credentials, your company Admin can also view these within the MoveDashboard, by following these steps:

Company > Settings > Solutions > ProApps > Licenses.

Tip:
During the activation process, it is recommended to allow your device to receive notifications from the CrewPro app. This ensures you stay updated with all your tasks and important information. Please follow the on-screen prompts to enable notifications, as shown below

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Step 1:

Add your activation code in combination with your email address and submit, this combination is unique.
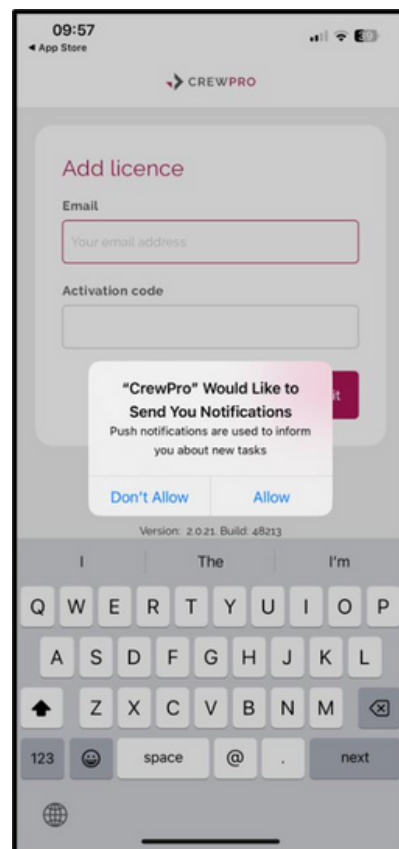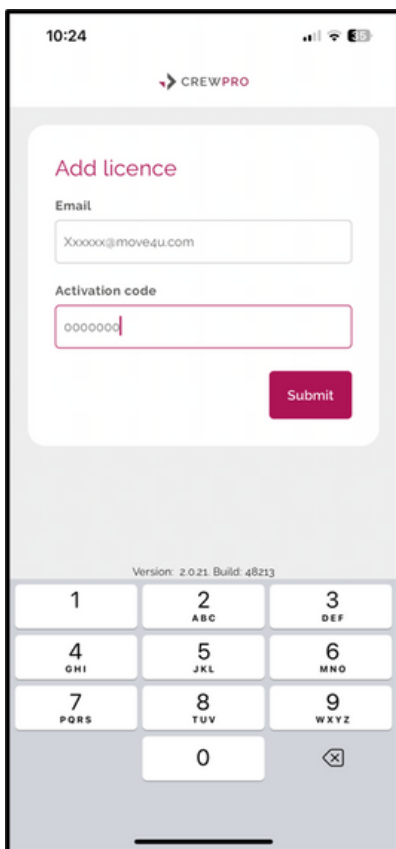
Step 2: Setting up the device base upon your specific needs, the next section of this guide will tell you all about setting these up. NB:. be aware this can be overruled by the super user of your organization

3. Settings

Below we will guide you through step by step the available settings for your license.

3.1. Preferences

Measurement System: Choose whether to use the metric system or imperial system for measurements by selecting the appropriate option.

*Inventory List:* Select from the dropdown which inventory list you wish to use as default.

Preferences

Weight

Lbs

Length

Foot / Inch

Volume

ft³

Date format

yyyy/MM/dd

Select default inventory list

Move4U Inventory list

3.2. Additional preferences

Here you can select/unselect based on your specific requirements. Please note, certain options refrain you from building a packing list without notifying of mandatory fields, and some options are company/user preference. For example:

- Save photos directly to gallery: Taking photos via the app will be saved to your device galley- disable to save storage space

- Show option for actual crate dimensions: When entering item dimensions, you can manually enter the crate dimensions too, or use of default 5%, 10% ,15% or 20% buffer
- Show full name for conditions (damage codes): All damage locations/conditions are linked to ISO's industry standard codes. If disabled, you will only see the codes and not names
- Add default email recipients: By default (if entered when creating the client file), if this option is selected, documentation will automatically be sent over to the client. You can also use this option to send reports to any emails entered via the 'Email Reports' section in the app
- Always use item color: If selected, users cannot build a packing list without notifying of the article sticker color
- Always use barcodes/scanning: Similar to above, if selected you cannot build a packing list without scanning a barcode or manually entering in the number
- Use of packers/PBO not mandatory: If your moving requires notification of who has packed what article, deselecting this option means you need to notify which crew member packed what- like rooms/floors, the previous crew member will pull through t the next item if not changed
- Do not show sticker number popup: If deselected, you have the option to start your article list with any number. By default, it is 1.
- Do not show Room Description popup: This pop-up is to notify you that you are entering a new room. For example, you may be transferring cartons from 'Bedroom' to the list, move to the 'Bathroom', then go back to the 'Bedroom'. If you select a new 'Bedroom' by mistake rather than the previous "Bedroom", you'll be notified- If on purpose, you can add a room description. By default it will be 'room' (2)
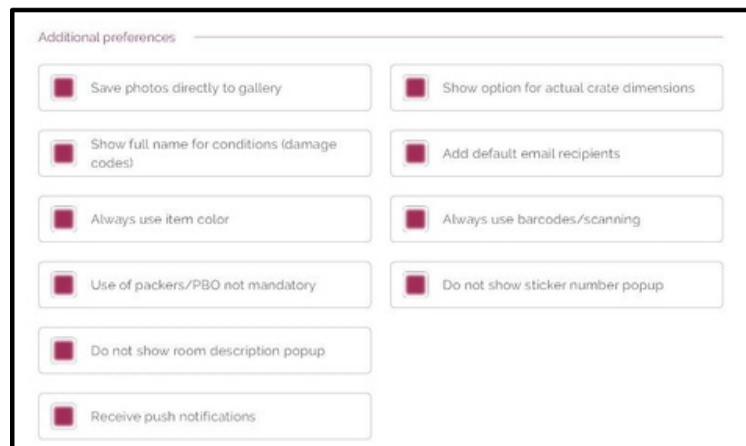
3.3 Customized view preferences

Here are all the dropdown sections which will be available across the app. You can simply choose what to see, and in which order. Tap on the pen icon to edit each section.
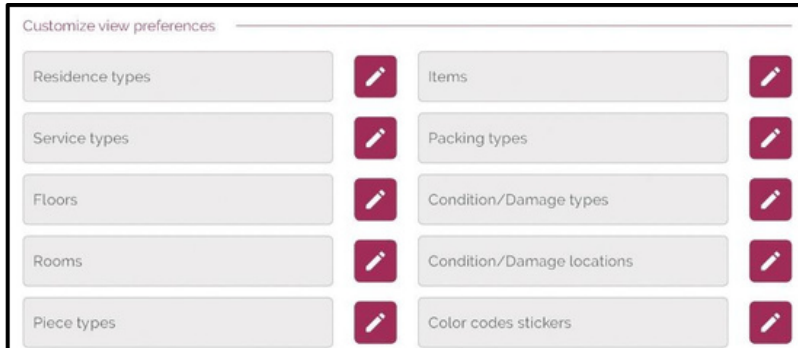

- By checking the boxes under the 'eye' column, you will indicate what will be available when viewing this dropdown.
- By checking the heart icon, these will come out on the top of the dropdown.
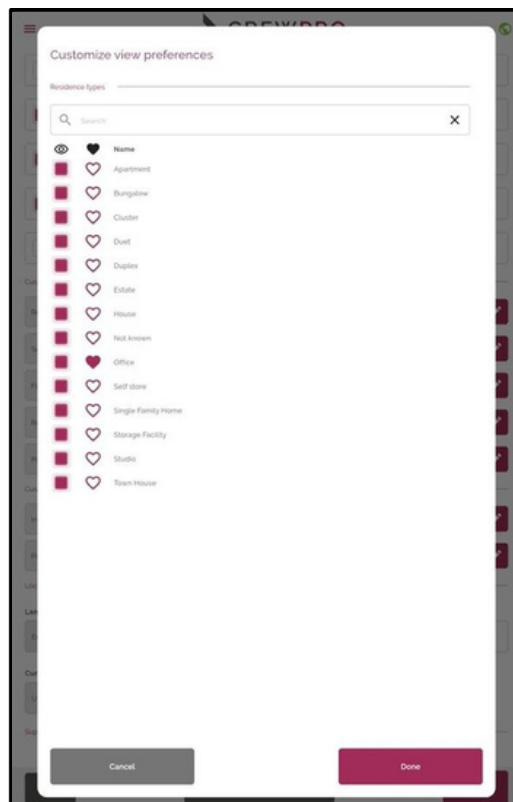
3.4 Customized Screens

Here you can choose what you want to see in each section of the app.

- Tap on the pen icon next to each section and select/unselect the corresponding boxes.
- What you select, will show up on the app, what you unselect will be removed from your app screen. This is here to streamline the user experience.
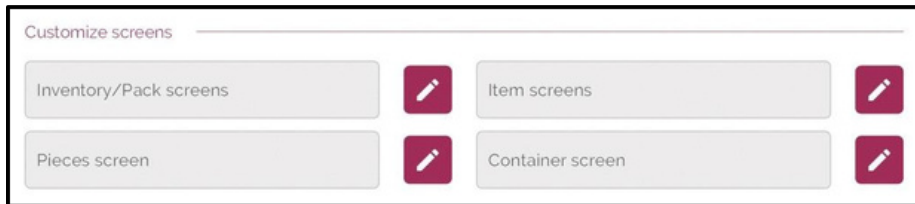
3.5 Localization preferences

Here you can select your local settings: language, country and currency. This means your crew can work in a language that suits them (on & offline), then your documentation will be uploaded in your default company language.
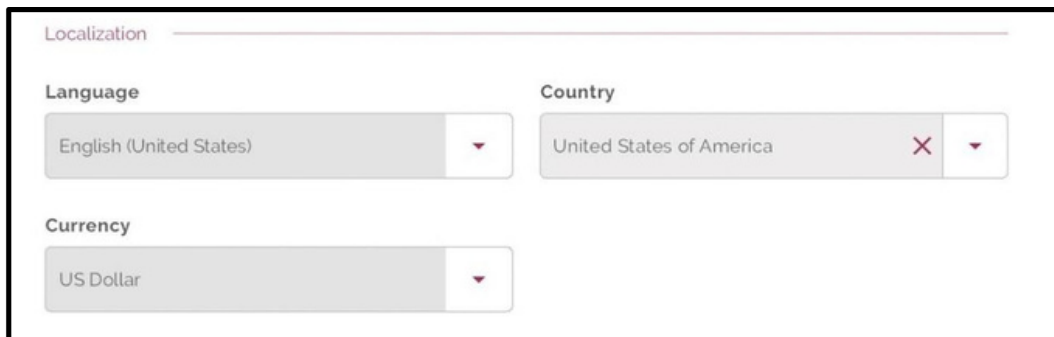
3.6 Support

This section shows the current log size.

- Logs can be uploaded for the Move4U Customer Success team to review, to identify errors and user experience.

3.7 License

The area will provide you with the end date and unique email address related to your activated license.

- By tapping on the bin icon to the left of the license, you can log out and remove the license from the device.

3.8 Signatures
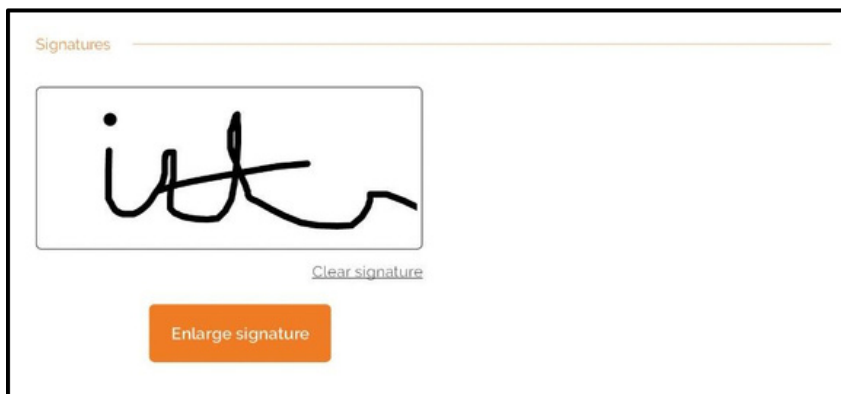
Here you will be able to create a prefilled signature that will pull through to all sections/. documents in the application where a crew signature is required.
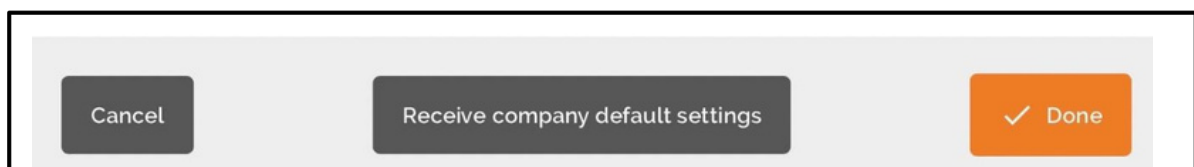
At the end of your settings, make sure to press 'done' to save your preferences. These preferences will now be logged by the application, and you will always have the same view, unless changes are made by yourself.

4. Dashboard/Start Screen

Once you have completed your settings, you will be directed to the CrewPro dashboard,
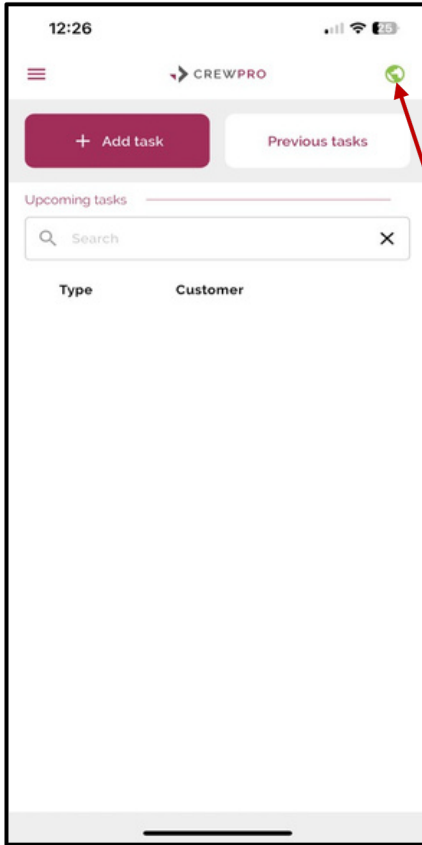
Dashboard – From this screen you can start working on your task

Online/Offline – From this screen you can also decide to work completely offline by pressing on the Green Globe in the top right-hand corner, and then select the option to work offline. If you should decide to work offline, please ensure that you have downloaded the task prior, by swiping to the left and confirm pressing download
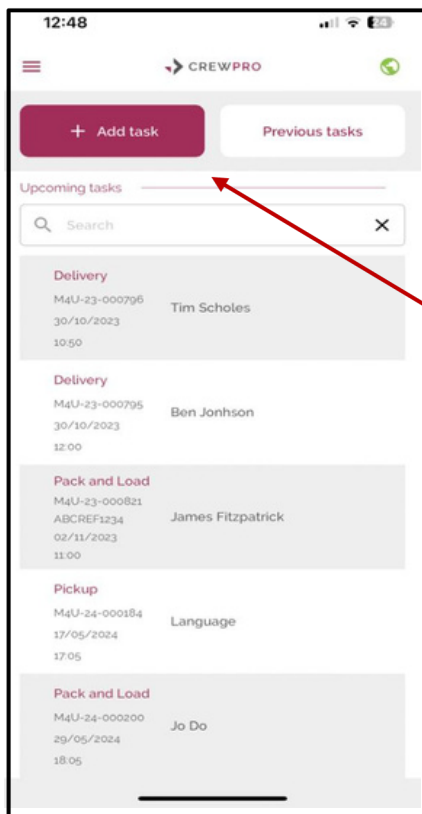
Tasks – You will need to swipe down on the screen and all the tasks which have been assigned to you will appear. For this editorial, we have created a pack & load task for Mr Jo Do, at the bottom

You can also start from scratch and create the task within the App by tapping this button
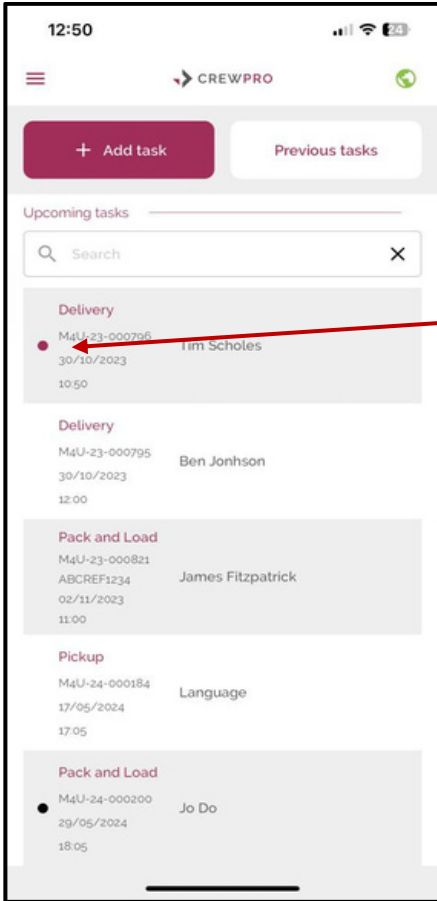
Task downloaded – The dot in front of the task means that the specific task has been downloaded
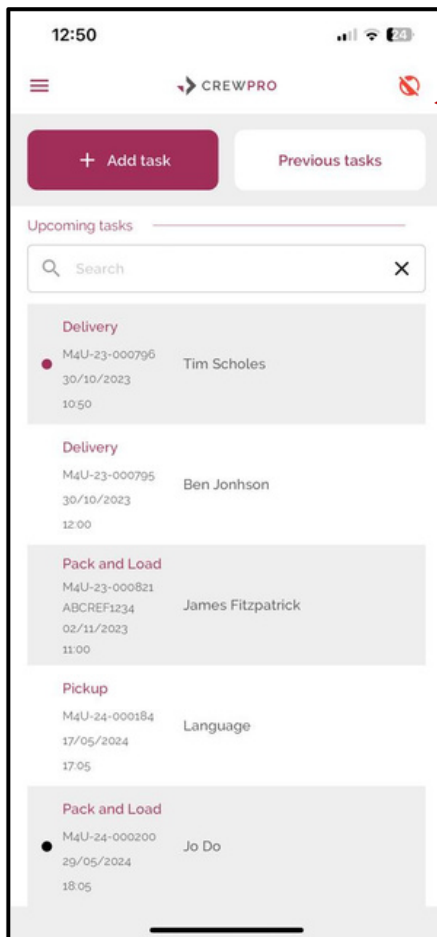
Offline modus – This red globe means the CrewPro device is now in offline modus without any internet access

**Note**: For detailed info on how to assign a task from the MoveDashboard, please read this article

5. Task Summary Screen

When entering the task, you will be directed to the Task Summary Screen with the following sub sections, each of these sections will be handled separately. You have the option to minimize each section to show less on your screen for ease of use.

|	
Check-in	Use this button to indicate when a crew has started a job and how long it takes to complete. Simply tap once and you will be checked in. This button is optional.
Task Summary	Here you will find general information relevant to the job. • Task Type • Any comments which the move coordinator inputted when scheduling, will pull through to here. • The inventory list being used for the job. • Space to free type the van number being used for the job. This is optional.
Addresses	This section contains the origin address(es) where the pick-up job needs to be performed and the destination address(es) if more than one is applicable. *See step 6 for further information.*
Walkthrough	Defines a number of pre-defined steps a crew must perform before starting the job, *See step 7 for further information.*
Information	Provides all client and service type information. By clicking on the pen icon, you can edit any of the information shown.
Inventory list	Where the packing list is created. *See step 8 for further information.*
Crew	Here you can register crew members assigned to the job. Tap on the pen icon and then +Add member. You can add as many crew members as you want. This section can also be prefilled by the Move Coordinator when scheduling the task.
Reports	Contains all the reports and documents handled throughout the process. *See step 9 for further information.*
Email reports	Here you have the option to add recipients to send the packing report directly to them via e-mail.
Signatures	Here it is mandatory for the customer and crew to sign. *See step 10 for further information .*

6. Addresses

In this section is all info regarding the origin address/es and destination address/es.
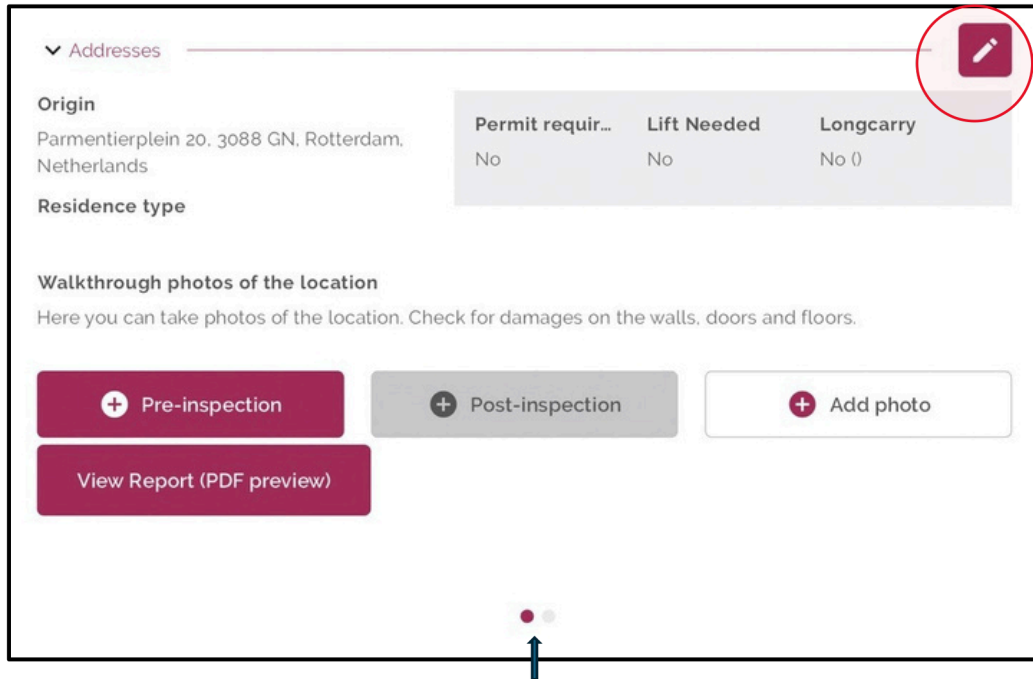

You can see an overview of the destination address by swiping left.

Click on the pen icon at the top right of this section to edit and it will pull up the below page:
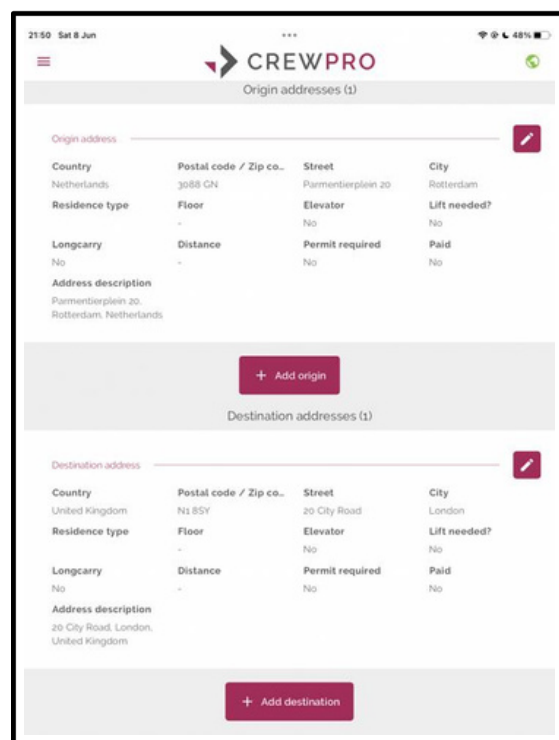
Tap the pen icon next to the relevant address you wish to edit or add information to. If there is an extra pick up or delivery location required, then here you also have the option to add in extra addresses for the origin and delivery

The subcategory, Pre-Inspection, can also be found within this section.
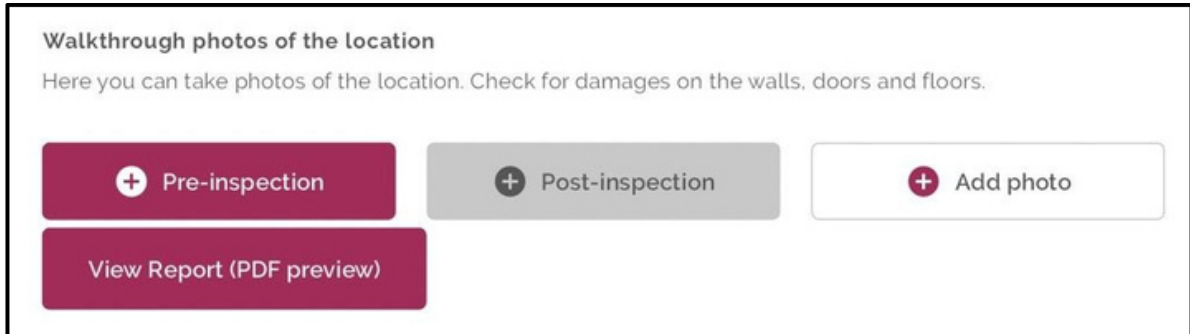
- Here is where you can mark damages of the property when doing the pre and post inspection. Simply add the damages by clicking in each section and assigning a floor, room, location and type of damage. You may add as many damages as you find.
- Tap +Add Photo to add photos of the damages. This can be done by taking the photo directly through the app or browsing your photo library. You then will have the option to edit the photo with features to highlight the damaged area such as drawing and cropping.

-
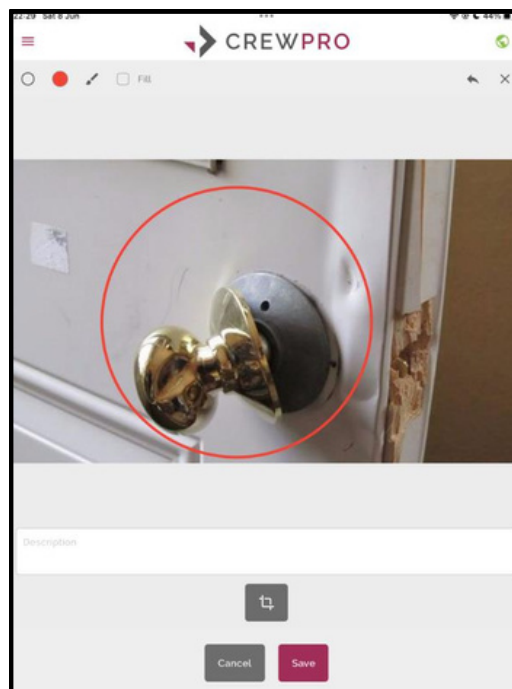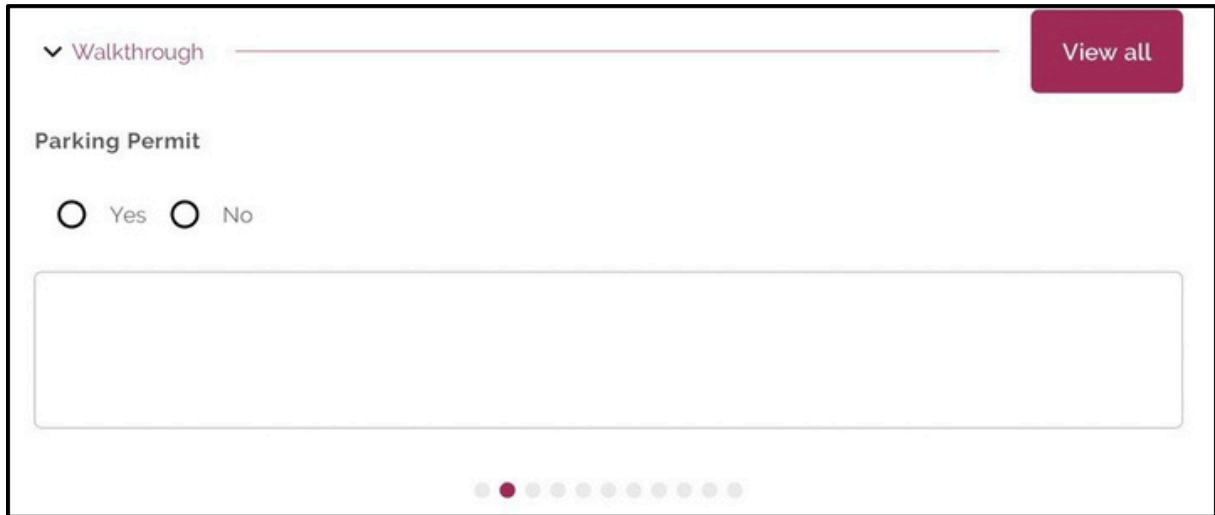
After each section is completed and signed off by the customer, the report will be immediately available for previewing in the app.

Note:

Once you have finalised a Pre/Post Inspection, you cannot edit again within this task. You can always add to this report throughout the task. If you want to navigate to another section in the app, do not finalise and use the 'Back' button

7. Walkthrough

This is intended to work as a check list for the job and is customizable per company, associated by a task type.

Simply swipe to go through the questions, select 'yes' or 'no' and free type comments into the box. Or tap view all in the top right corner to view all questions at one glance.

Tip:

These are fully customisable questions and topics/purpose can vary based on company needs. To discover more about how to utilize this section, click here

8. Inventory List

Let's dive into the inventory/packing job

There are two possibilities: starting from scratch or using a pre-populated list based on survey results.
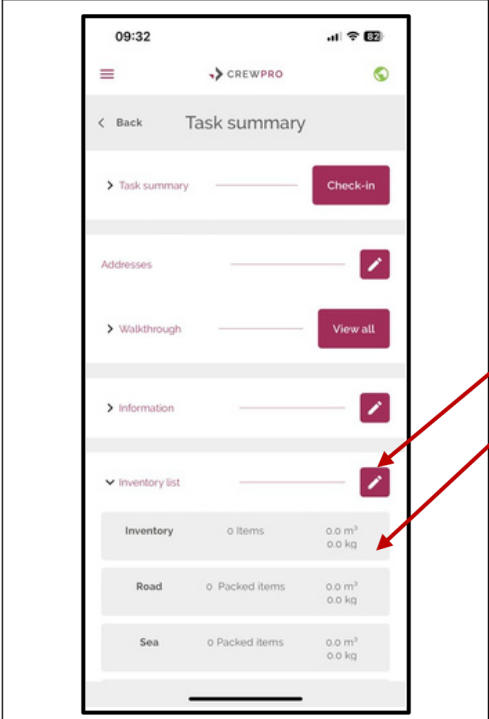
1) Packing from scratch
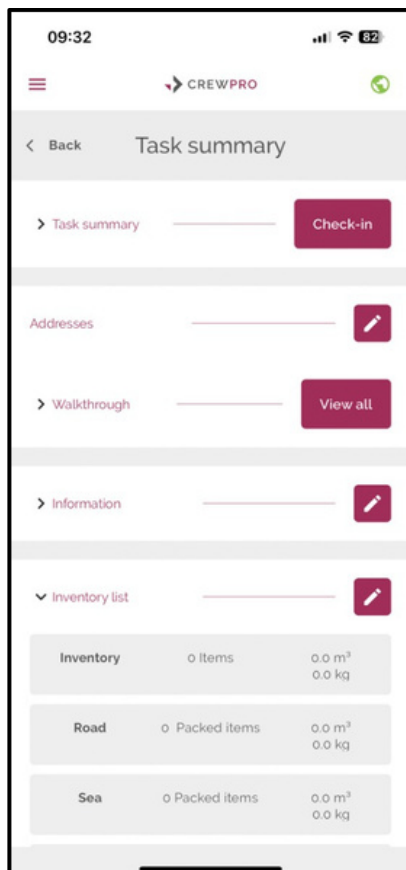
2) Packing with survey data
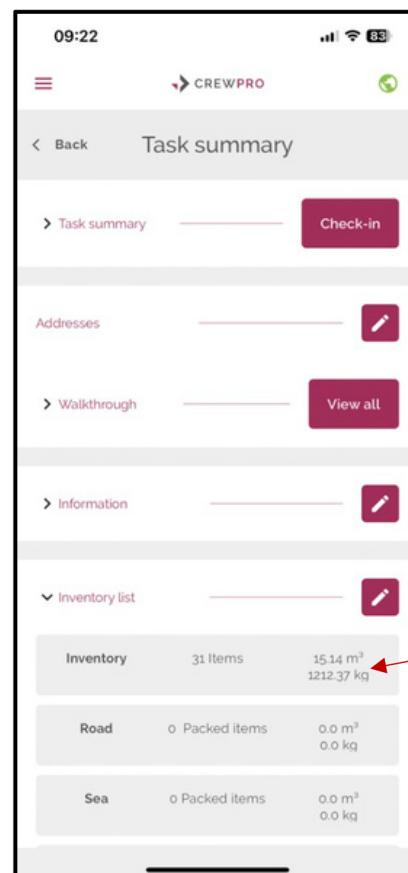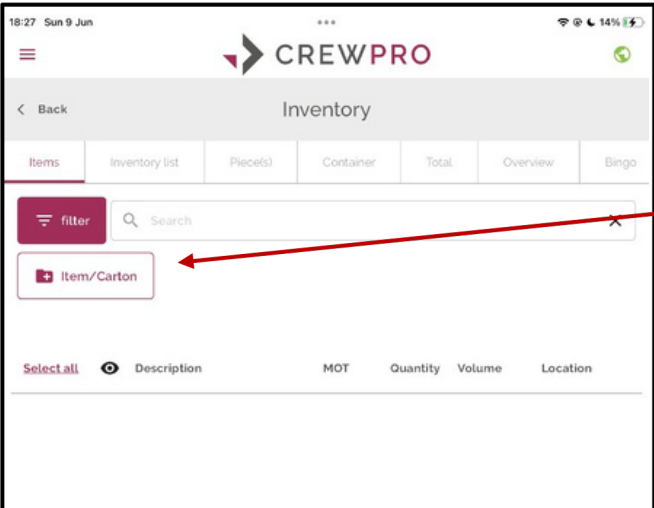
8.1 Inventory starting from scratch

Start building the packing list from scratch

Tap on the pen icon to start the process here
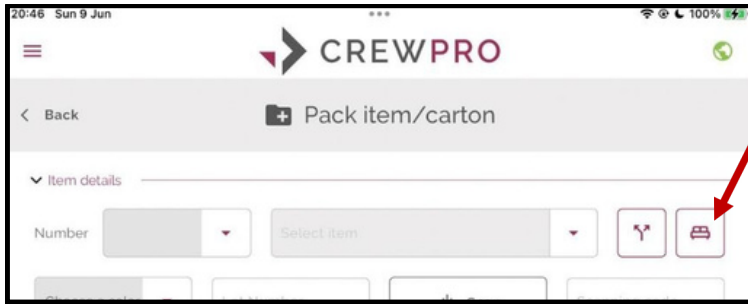
Note: there is no volume/inventory available


Start your packing list by tapping here on +Item/Carton

Let's break down the pack item/carton page into sections...

| Note: |
| --- |
| The appearance of this screen may vary depending on your settings. For the purpose of this introduction, all available options are currently visible. |

Choose whether you are packing an item or a carton. When the bed Icon shows, you can select items from the dropdown. Tap on this icon once and it will change to the carton view, in order to select and pack a carton.
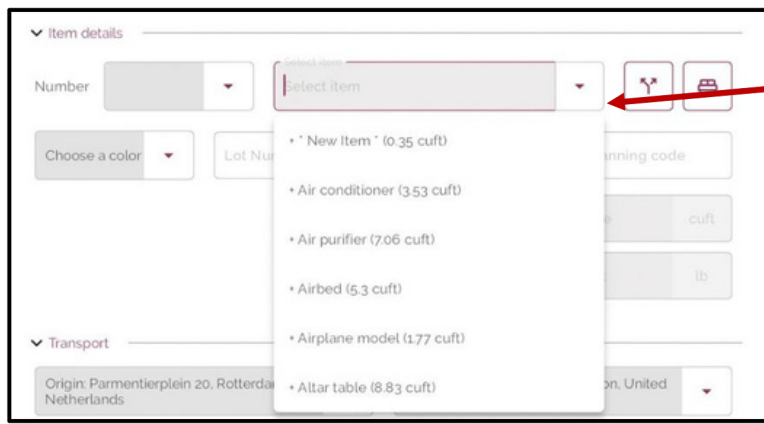
Select an item - you can do this typing in the name or by using voice dictation.

You can add in an item that is not available on the list by tapping +*New Item*
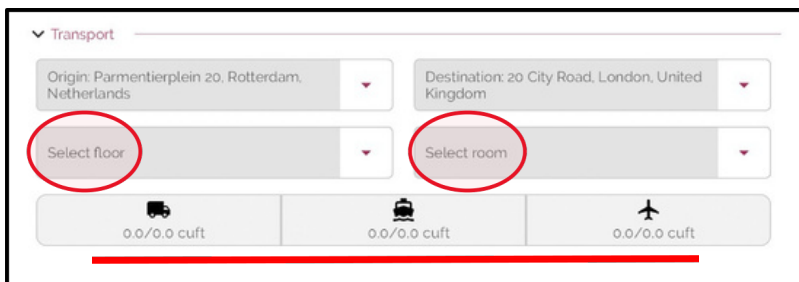
Next you must select the floor, room and MOT.

Tip:

If more than one MOT and destination is required - Each item you pack, you can easily switch between mode of transports, and addresses. Separate packing lists will be created upon finalization, per MOT and destination address.

As you scroll down the item screen, you will be able to mark any details applicable to item by simply tapping the boxes

Here you can add a comment, damages and photo to the item.

Once the page has been filled, press 'next item' or 'done' to save the item.

This button can be used if you wish to duplicate. Tap once to duplicate once or long tap to enter in the number of times you wish to duplicate the item/cartib. The page will automatically lead you to the next item after entering,

Tip:

Tapping on done will take you back to your main inventory page where you can see the overview of the items which have already been added. Tapping next item will bring you to the next item page to carrying on building your inventory.

When Moving onto the next item, the screen will come up with the starting sticker number pop up. It will automatically start from 1, but let's say you are starting for a different number, you can type the number in the box and then press ok.

Now we are onto adding in our second item, let's show you how to pack a carton. When selecting the carton, the screen is slightly different to the item screen, as cartons must contain a content.
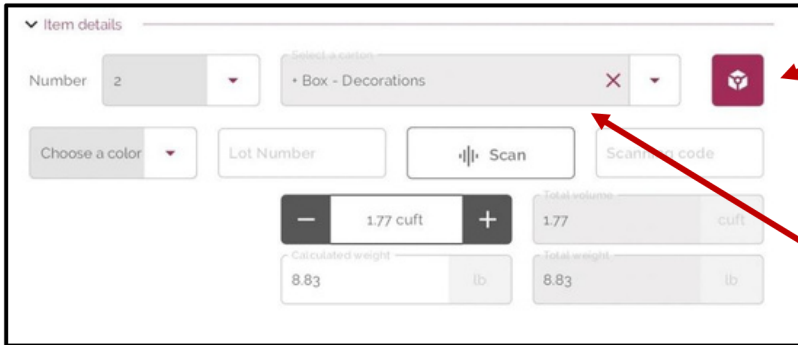
By tapping on the bed icon that you saw in the previous page, the icon will change to this. This now means you can select a carton from the dropdown and pack a carton

As you can see here, I have selected a box of decorations
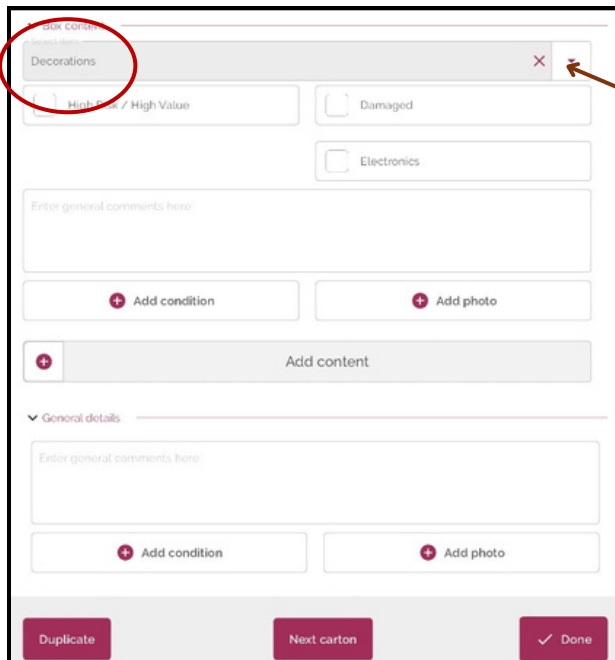
As you scroll down past the details section (same as what we saw when packing an item), you will arrive at the box content section. Here, the box is already prefilled with decorations

You have the option to add as much content as you like. Simply tap on this button to add.

Once added in all relevant fields and information, tap on 'Next carton' to save and continue building

Note:

The app will not let you move onto the next item without adding in a box content. In the inventory lists we have available in our app; specific boxes will have preset content which will automatically prefill here. So, unless you wish to add extra content, you may simply go onto the next carton.

8.2 Inventory starting with survey Items

Now we have shown you how to pack from scratch, let's pack some items directly from some pre-move survey data.

Note:

If you have created a survey via our app, SurveyPro, or entered items into the inventory section within the MoveDashboard, this data will then sync with CrewPro, allowing you to pack directly from this survey data.
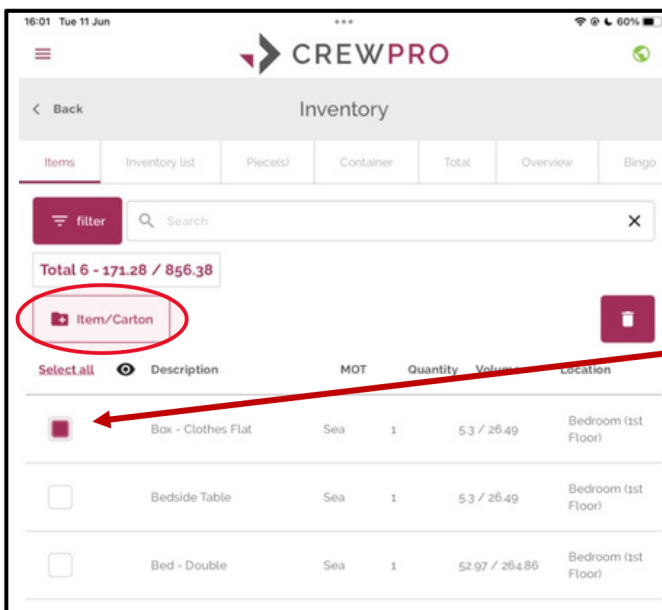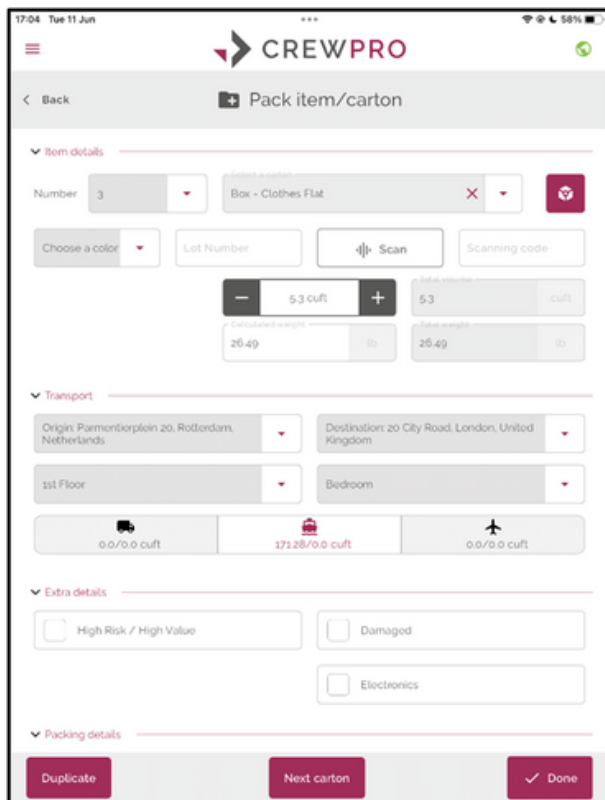

Here we are on the main page where you pack items and cartons, you can see that we have some available to select as this is where your pre-move survey data will appear.

Select by tapping in the box to the left of the item. Then tap '+item/carton'

Note:

All survey data will also show at the top of the item/carton dropdown, available to select if it has not already been packed.

The screen will be the same as when packing an item/carton from scratch, apart from this time the item/carton is already prefilled with its volume

Now follow the same steps to add the necessary conditions and details as shown previously when packing an item/carton

Now you can press on 'Next carton' to carrying on packing on this view or press on 'done' to take you back to the overview screen
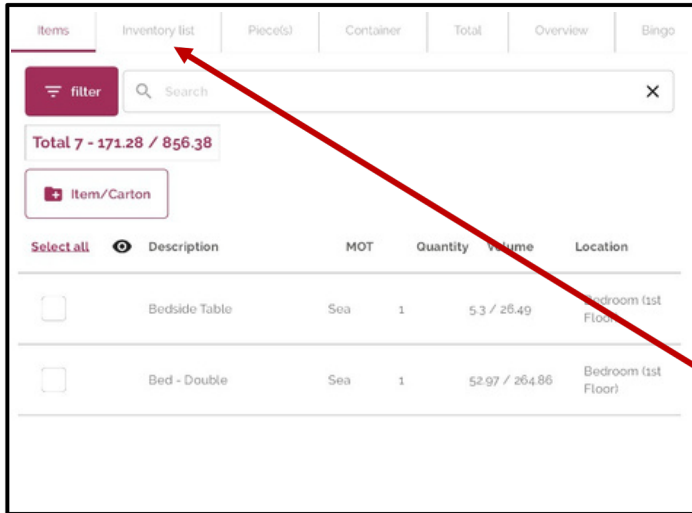
Here you can see that the carton we just packed has now disappeared from this screen as it has been packed

If you swipe left on the screen, you will view all packed items, under the 'inventory list' tab

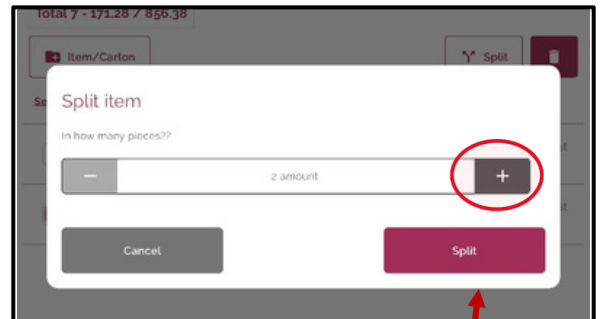## Additional features for packing:

8.3 Splitting an Item

There are two ways to split an item:

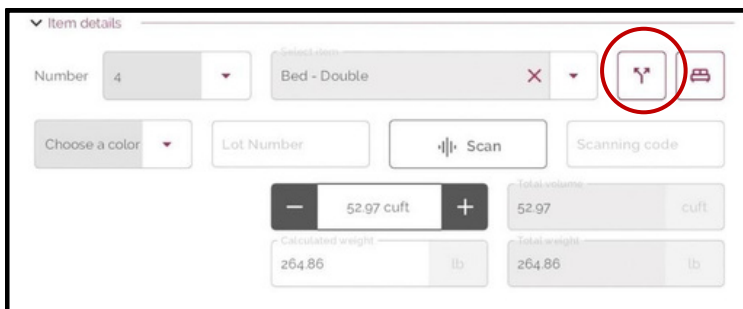1) By selecting an item from the pre-move survey data
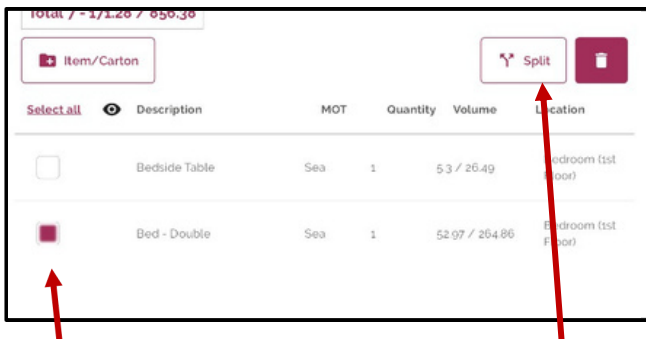
Tap on the box to the left of the item that you wish to select

Tap on Split

Choose the quantity you wish to split the item into. Confirm by tapping the red split icon

2) By selecting an item on +item/carton page

After tapping on the split icon. The same pop up will show here as above in option 1

Note:

Once split, separate packing list items will automatically be created

8.4 Scanning an item

The app offers you the function to scan a barcode to pack an item directly into your packing list. If you use barcodes when packing, and require information on how to do this, please visit our knowledge base for further information.

Now let's explore some of the tabs you see at the top of the screen....

Inventory list tab
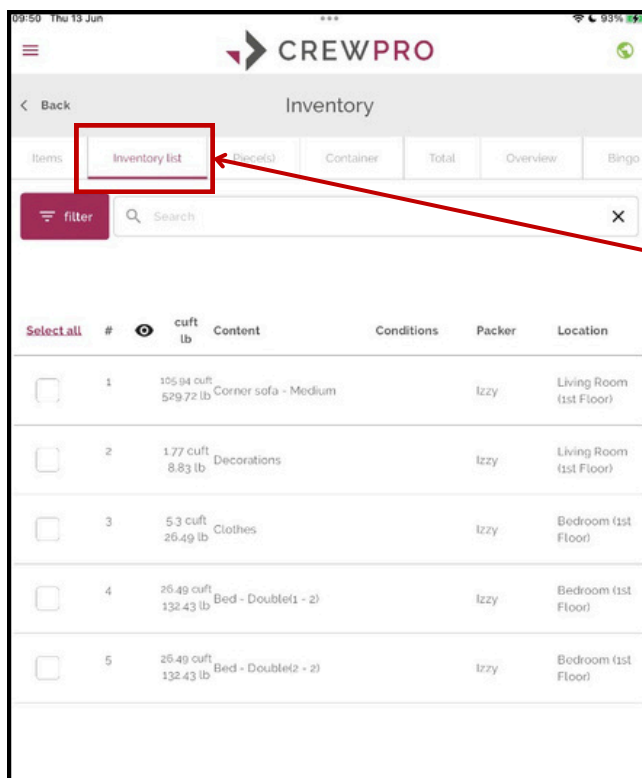
Here is where you will find your packing list. You can come to this tab anytime to check the items that have been packed

If you need to edit details to an item/carton after packing, then you can do so here by tapping onto the item you want to edit

If for some reason an item or carton is not going anymore and must be removed, on this page you have the option to do so (see below for more details)

Tip!

You can use the filter option on the top left of the page to filter the list by destination, floor, room, MOT etc. You can also do this under the items tab to filter survey items, this helps when wanting to focus on the items based only on the room you are currently packing in.

8.5 Deleting/voiding an Item

There are 2 options to remove an item from the packing list...

Option 1 - Delete

You can see here the item has disappeared from the packing list. Now if you pack another item, item number 1 will be available to assign

Option 2 – Void

Make sure you select the reason and then press ok

Here the item is still on the packing list but with a line through it, this is to show that the item was originally packed but now no longer going

The rest of the tabs explained

|	
Piece(s)	In this tab you can create a piece. For example, a lift van. Once you have items in the packing list, you can select an item/s and add them to a piece. Please see our knowledge base for further information.
Container	This section allows you to add a container, and all its relevant information. You can then add a piece to the container. Please see our knowledge base for further information.
Total	This shows the total packed items per MOT and volume.
Overview	This shows the total items/cartons and volume/weight per room and a total of the whole move
Bingo	This can be used for loading purposes
Media	Here you will find any media (photos) attached to the task
Survey comparison	This tab can be used to compare the data from the survey to the items packed.

9. Reports
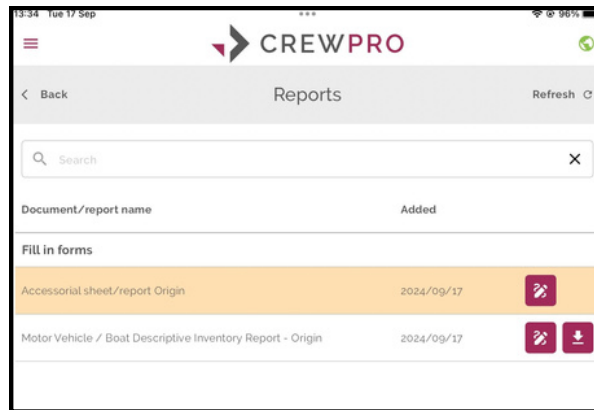
In this section you will find all documents available on the file, or forms for the use of filling out and signing. These documents can be added into the move file prior to the move and will then be available here.

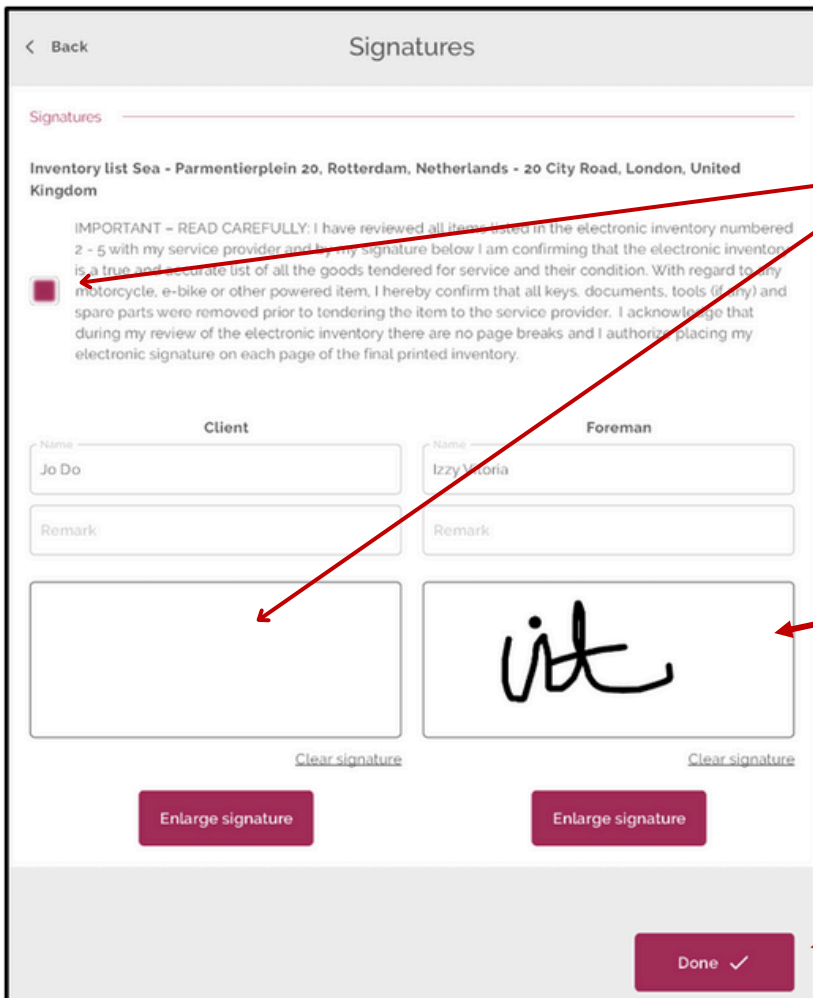The app has various functions available for documents:

1) Mark-Up documents
2) Dynamic (fill in) forms
3) PDF editor

please visit our knowledge base for further information on how these documents work.

10. Signatures
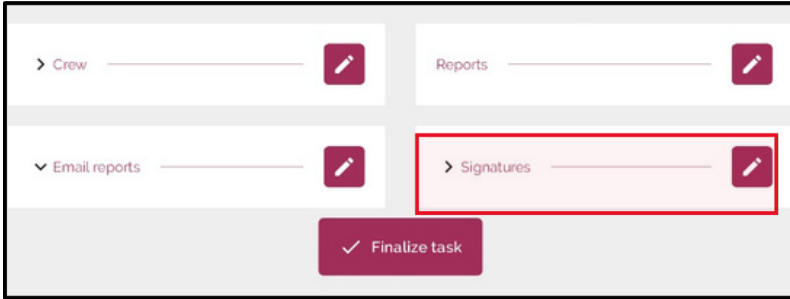
At the end of the packing, it is time to collect the signature of the client

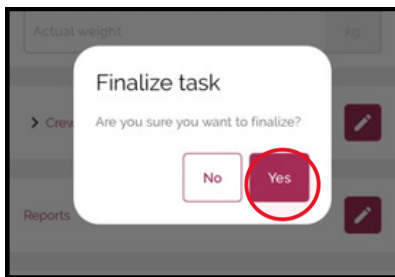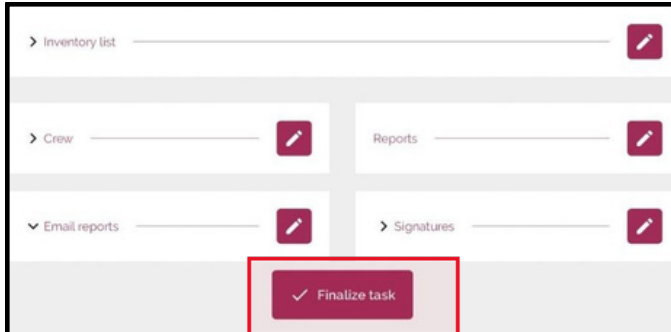The client must make sure that they tick this box and then place their signature here
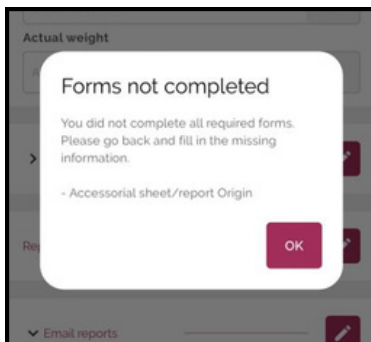
The Crew signature will be prefilled according to settings

Once done, tap here

11. Finalize

Once you are done with your task it is time to finalize!

Once ready, press the finalize task button and confirm yes to finalize

Warning: If you try to finalize a task and not all forms and or documents have been completed, you will get this notification pop up.
In such case, please go back and finalize the required documents by completing the missing information

Once confirming to finalize, the task will dissapear from your dashboard on your device and all data will be sent to the cloud (the MoveDashboard)
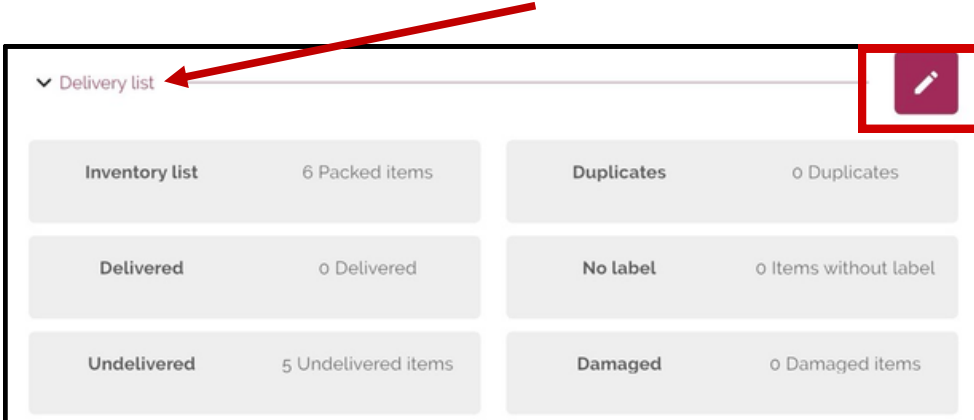
Note:

If you press on finalize while offline, the data will not be sent to the MoveDashboard until you have a moment of online connection.
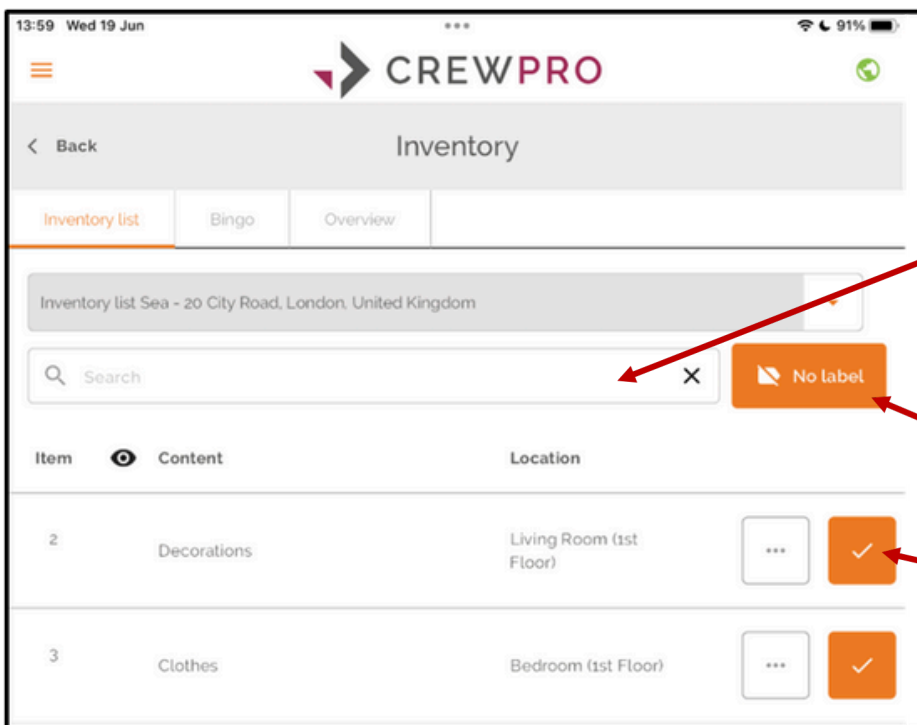
12. Delivery Task

When you open your delivery task the same task summary page will come up, as with your pack and load task. The same sections will be there as previously explained earlier in this guide.

- Fill in all relevant details then scroll down to find the delivery list section.

Inventory list	6 Packed items	**Duplicates**	0 Duplicates
Delivered	0 Delivered	**No label**	0 Items without label
Undelivered	5 Undelivered items	**Damaged**	0 Damaged items

Tap on the pen icon to pull up the section where you can start to deliver items

You can search for the item you want to deliver by using this search bar, or simply scroll through the inventory list

Option to add no label items, if crew find an item which is being delivered without a label

Here you can simply tap on the tick to mark the item as delivered
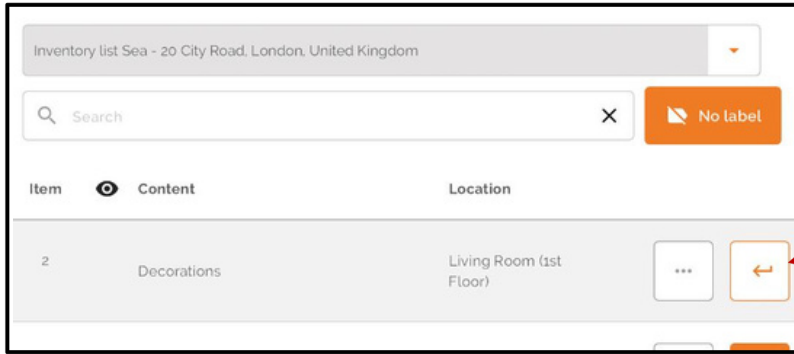
Once marked as delivered, the item will be greyed out on the inventory list, but in case you have marked it delivered by accident, the option to mark it as undelivered is there
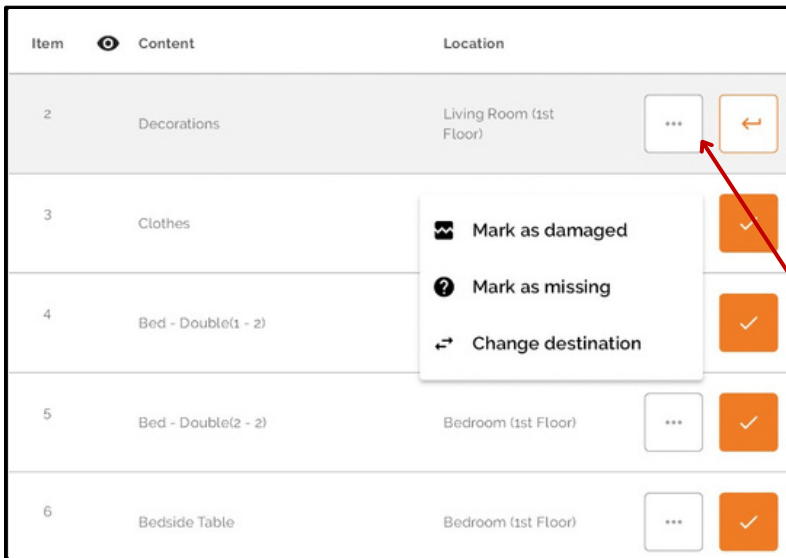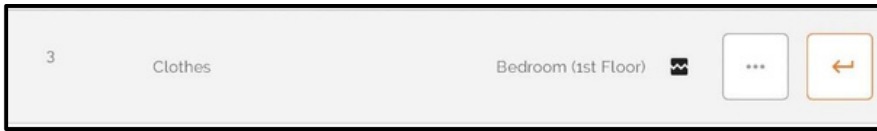

Another option you have when delivering items, is to tap on the 3 dots and select one of the 3 options – Mark as damaged, Mark as missing or change destination (see below for further information)

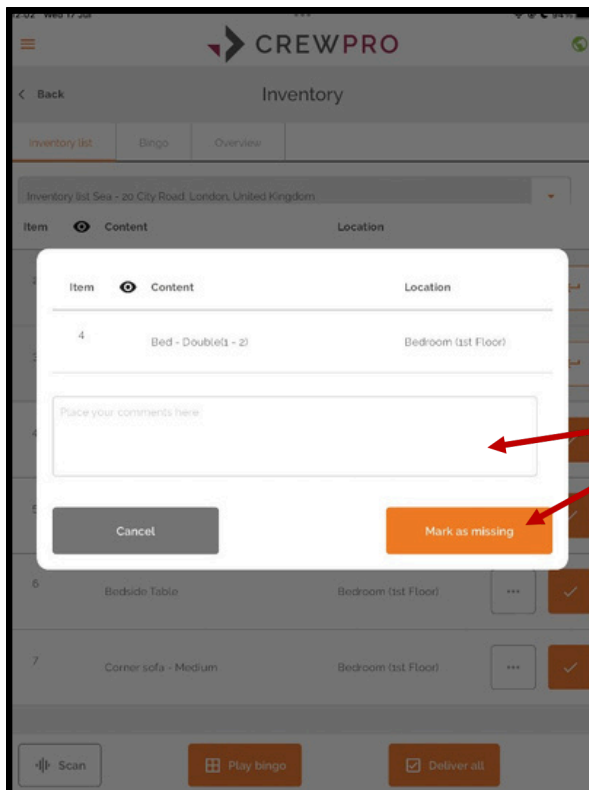## 12.1 Mark a delivered item as damaged
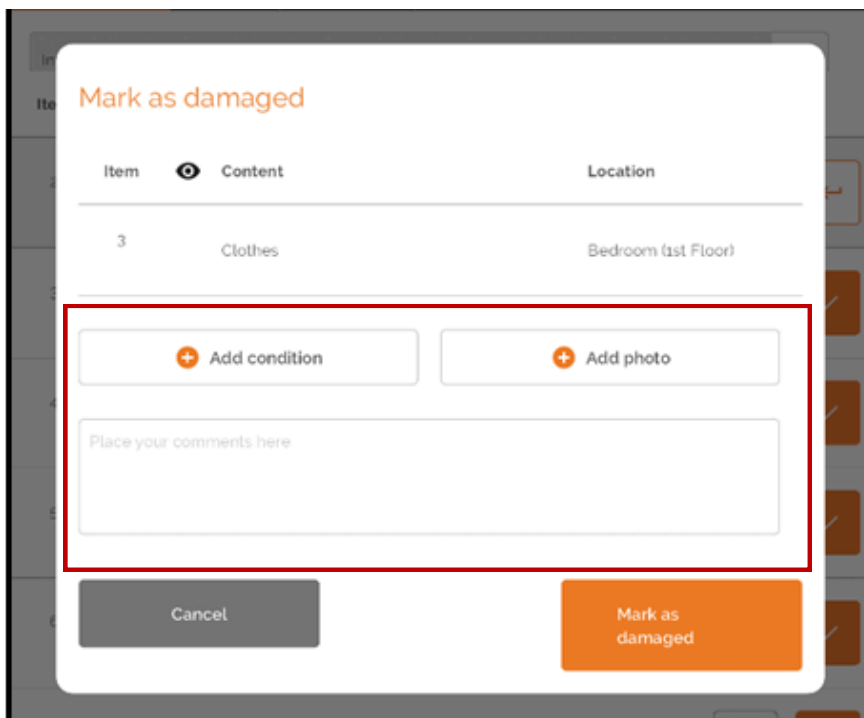
If an item is damaged, you can add a condition, comment and photos of the damage

Once marked as damaged, the item will be greyed out as it is now delivered, but will have the damage logo next to it

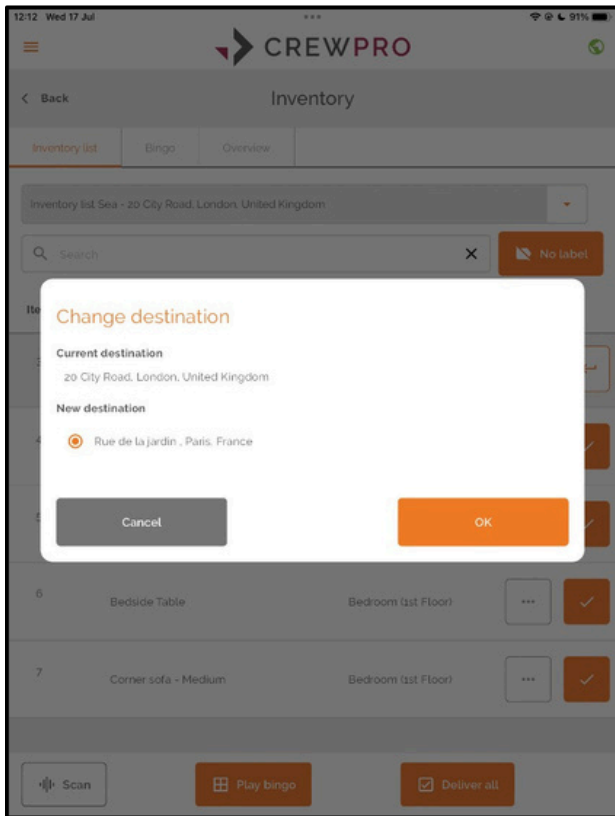## 12.2 Mark an item as missing

If an item is missing from delivery, you can add a comment and mark as missing

This will not be greyed out on the list as it is an undelivered item. It will show a question mark to indicate that it is missing
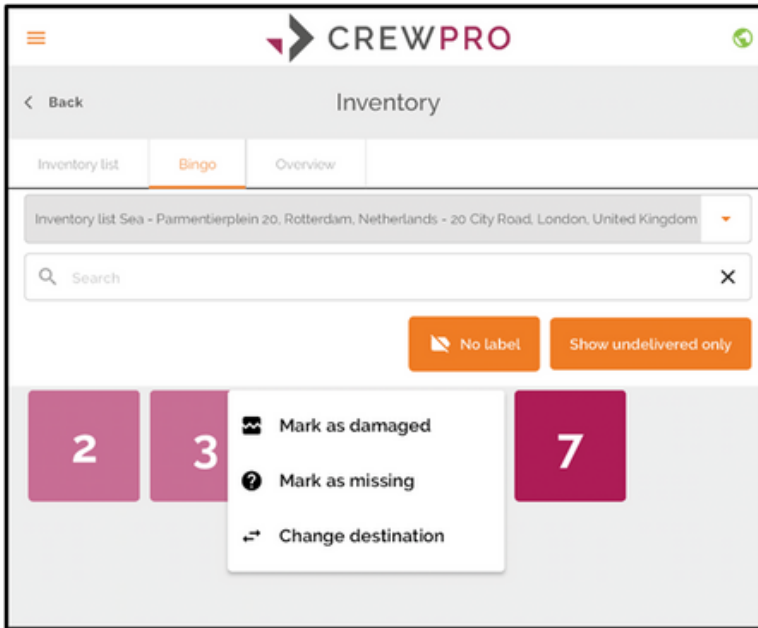
12.3 Change Destination

If you have multiple destination addresses for a move, you can select change destination next to an item and select the destination you wish to change it to.
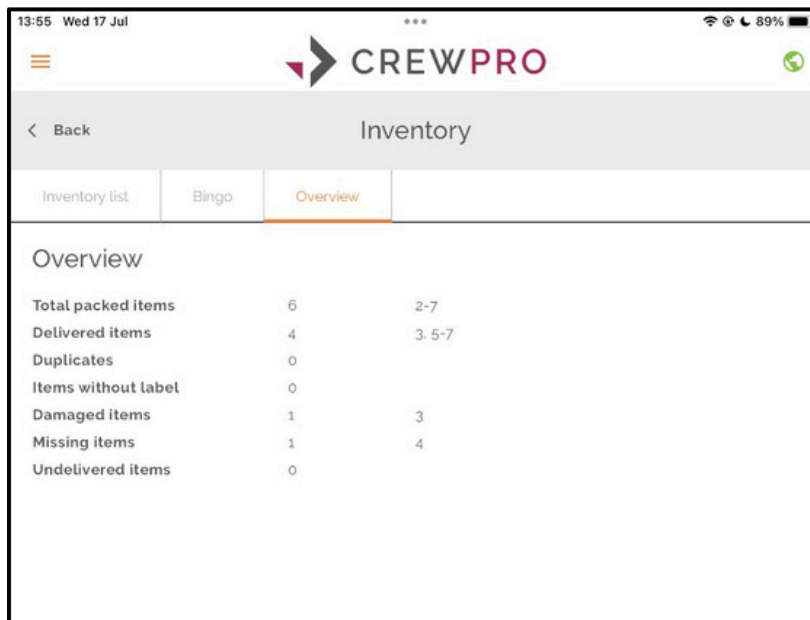
12.4 Play Bingo
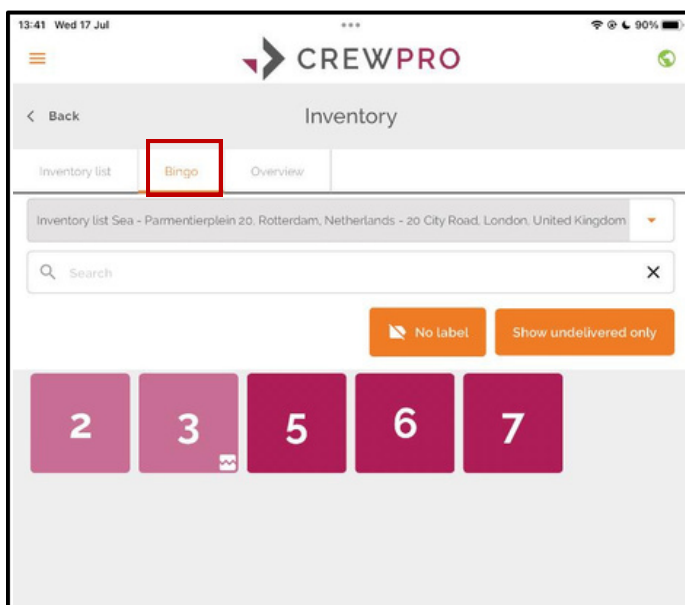
In the bingo tab you can simply play bingo by tapping on the items to deliver
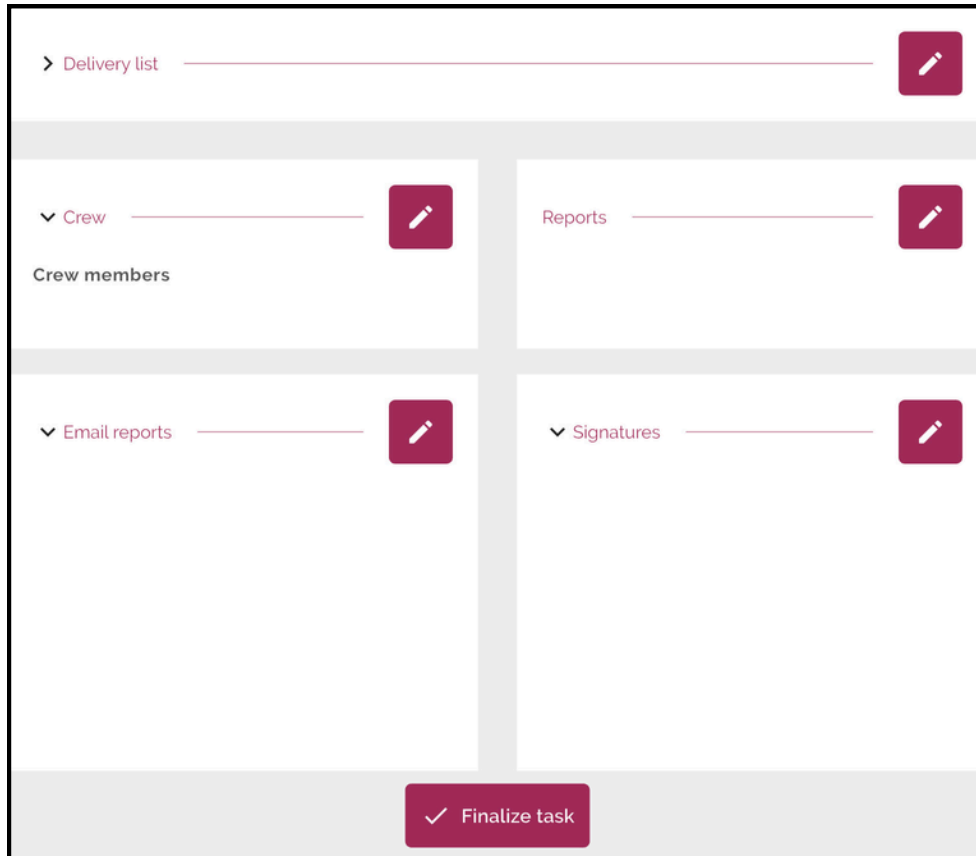
Long tap on the item number to mark the item as damaged, missing or change destination

12.5 Overview Tab

Here you can find an overview of the delivery and the totals of each category listed and their corresponding packing list number.

Now the delivery list section is complete, fill in all relevant sections below (the same sections as shown in the Pack and Load task) and then press finalize!

> Delivery list ✏️

∨ Crew ✏️

Crew members

Reports ✏️

∨ Email reports ✏️

∨ Signatures ✏️

✓ Finalize task

Upon finalisation, your documents will be ready to view in the MoveDashboard.

If you have any questions or require any further information that is not stated in this guide, please refer to our knowledge base or don't hesitate to reach out to our support team
Support@move4u.com