



SURVEYVIDEO USER GUIDE

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1. What's SurveyVideo

SurveyVideo is an app that transferees (customers, services members, assignees) will use to connect with the moving company, in this app, a transferee is able to connect through a video call, text chat, upload photos, and videos, and send emails to the moving company.

The app is available for iOS and Android.

- Android users will require Android 5.0 or higher to install the app.
- iOS users will require iOS 8.0 or higher to install the app.

As you probably have noticed, this app is focused on the transferee's experience. There are other requirements for the surveyor, we'll take a look in the next section.

2. Requirements

As a surveyor, you will need Mac or Windows laptop or PC, a webcam and a microphone. There is no specific app to install or download for your computer. The entire process is managed through the cloud. This means you need only a browser installed on your computer. We recommend Google Chrome. Checklist:

- Mac or Windows laptop or PC
- Webcam
- Microphone
- Google Chrome

Once you have all of this plugged in and set up, you can move to the next step.

3. Creating a move file

Before scheduling a video survey, we will need to create move file. This move file will contain information such as addresses, contact details, pre-move survey, and digital inventory info, documents, photos, and videos. Once you create a move file and add the basic contact and address details, you will be able to schedule tasks: surveys, videosurveys, packings, deliveries, etc.

Go over to Moves to create your move file, this is the URL <https://cloud.move4u.com/#/movepro/moves> Click New File, this creates an empty file.

Customer Portal | MovePro Mo x +

cloud.move4u.com/#/movepro/moves WE RECOMMEND BOOKMARKING THIS URL

MOVE DASHBOARD YourFavoriteMovingCompany johndoe@yourfavoritemovingcompany.com

Overview moves

Date range: 2020-11-02 - 2020-11-02

Status: New Pending Cancelled Booked Lost Done Merged

+ New file ← CLICK HERE TO CREATE A NEW MOVE FILE

Show: entries Search: Show columns Show deleted Excel CSV PDF Print Copy

Move	Added	First name	Last name	City	Storage	cft				Owner	Status	Actions
YFMC-20-000013	02-11-2020 12:39	Chris	Lawrence	Amsterdam	No	0.00	0	0	0	johndoe@yourfavoritemovingcompany.com	Pending	

Showing 1 to 1 of 1 entries (filtered from 5 total entries)

THIS IS A MOVE FILE

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- Within this new file, go to the Client tab.
- Add the first name, last name, email address, and origin details.
- Click on Update to save.
- Go to the Tasks tab.

The screenshot displays the MovePro Ed interface for editing a move (YFMC-20-000013). The interface is divided into several sections:

- Client Tab:** Located at the top, it contains fields for Dossiernumber (YFMC-20-000013), External reference, Account ID, and Account name. An "Update" button is present below these fields.
- Client Location:** This section includes fields for Street, Postal code / Zip code, City (Amsterdam), State, and Country (Netherlands). An "Update" button is located below these fields.
- Contact Information:** This section includes fields for Salutation (Mr.), First name (Chris), Last name (Lawrence), 1st Email (chris@samplemail.com), 2nd Email, 1st Phone number, 2nd Phone number, and Preferred language. An "Update" button is located below these fields.
- Household:** This section includes fields for Adults (0), Children (0), Pets (0), and Household. An "Update" button is located below these fields.

Red arrows and boxes highlight key actions and fields:

- 1. GO TO THE CLIENT TAB:** Points to the "Client" tab in the top navigation bar.
- 2. FILL IN THESE DETAILS:** Points to the "Contact Information" section, specifically the first name and last name fields.
- 3. CLICK ON UPDATE TO SAVE:** Points to the "Update" button in the "Client Location" section.
- 4. GO TO TASKS:** Points to the "Tasks" tab in the top navigation bar.

As we will show you later when you schedule a video survey, the system sends a confirmation email, this is why the client's email address is required.

In the email we address the client by their full name and confirm the time and date of the survey, this time is adjusted to the origin's address time zone, so it's important to have the right address in the system.

4. Scheduling the video survey

Now that the file is ready you can move to the Task tab, here click on Add Task and you should see a screen similar to this.

The screenshot shows a web browser window with the URL `cloud.move4u.com/#/movepro/task/68a85a60-b380-4805-b1b1-3c10afcd08ac`. The page title is "Customer Portal | MovePro Ed". The left sidebar contains navigation options: Dashboard, Tasks, Moves, External tasks, Admin, SurveyVideo, Settings, Support Center, Manuals, and Changelog. The main content area is titled "TASK INFORMATION" and contains the following fields:

- Type of task: SurveyVideo (dropdown)
- External: No (checkbox)
- Location: Amsterdam, NL (origin) (dropdown)
- Surveyor/Crew: John Doe (johndoe@yourfavoritemovingcompany.com) (dropdown)
- Surveyor/Crew telephone number: +31 06 1234 5678 (text input)
- Task date: 02-11-2020 13:00 (calendar icon)
- Transferee time zone: Europe/Amsterdam (dropdown)
- Transferee time: 2020-11-02T13:00:00+01:00 ==> 02-11-2020 13:00 (CET) (text input)
- Duration of task in days: (text input)
- Transferee name: Chris Lawrence (text input)
- Email transferee: chris@samplemail.com (text input)
- Comments: (text area)
- Keep me notified: Yes (checkbox)

At the bottom left, there is a red "Update" button with a red arrow pointing to it and the text "CLICK UPDATE TO SAVE".

Once you have clicked on Update, you will see 2 notification pop. The first will ask whether you want to send the email confirmation to your client. The second will ask whether you want to send the email notification to the surveyor.



Dear Chris Lawrence,

Thank you for scheduling a virtual survey with us. We would like to confirm your appointment with John Doe on Monday, 02 November 2020 at 13:00 (W. Europe Standard Time).

During the live video call, we will assess the volume of the goods you would like to ship. Therefore, we will need to see all the items that you will be moving. Below you will find a few steps you may take as preparation for your scheduled appointment.

Step 1 - decide which items you would like to move.

Step 2 - be prepared to open all cabinets, turn on all the lights and have a measuring tape at hand.

Step 3 - please download the SurveyVideo App in advance using one of the below links:
[iOS](#)
[Android](#)

Step 4 - verify that your phone/tablet is fully charged and has a good connection to the internet (either via WiFi or 4G). Enable the auto-rotation setting (Android users) or unlock the rotation setting (iOS users). Click [here](#) for instructions.

Step 5 - please log into the app with the following login details:
Username: chris@samplemail.com
Password: 179081

Step 6 - open the app and start the video call at the agreed date/time by clicking the "Connect" button. Allow the app access to the camera and microphone by clicking "OK". A video connection will start, and John Doe will guide you through the whole process. Please note that the call will be recorded. If you rejected the request for access, you will need to enable it to move forward. Click [here](#) for instructions on how to enable the access.

Should you have any questions prior to your scheduled appointment or if you need to re-schedule for any reason, please feel free to call: +31 85 760 4 760.

Thank you for your time. We look forward to working with you.

Kind regards,
YourFavoriteMovingCompany

Contact information

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Here is a sample of the email confirmation sent to a client. This email confirmation addresses the client by their full name, displays the time and date scheduled, the surveyor assigned, the links to download the app, the access details, the company logo at the top, and the company's contact information.

5. Starting the video survey

Now that the video survey is scheduled, head over to <https://cloud.move4u.com/#/surveyvideo/schedule> to view all scheduled calls. You see the client's name and the access code.

On the right side of the task, you can find 4 buttons. Click the green one if you're ready to start the call. This will open a new page, here is where the call actually takes place.

The screenshot shows the Move4U Customer Portal interface. The browser address bar displays cloud.move4u.com/#/surveyvideo/schedule. The left sidebar menu is open, with the 'SurveyVideo' section selected and the 'Scheduled' sub-item highlighted. The main content area shows a table of scheduled video surveys for the date range 2022-11-23 to 2022-11-29. The table has columns for Date, Dossier, Surveyor/Crew, Transferee name, Transferee email, Access code, and Actions. A single entry is shown with a 'Start' button highlighted in green. A red arrow points to the 'Start' button with the text 'CLICK HERE TO OPEN THE CALL PAGE'. Other buttons in the Actions column include 'Reschedule', 'Cancel', and 'Send reminder'. The page also includes a search bar, a date range selector, and pagination controls.

Date	Dossier	Surveyor/Crew	Transferee name	Transferee email	Access code	Actions
2022-11-25 10:30	M4U-22-000939	yashna@move4u.com	Niki Samila	niki@mail.com	259123	Start Reschedule Cancel Send reminder

Here is where the call takes place

The screenshot displays the SurveyVideo interface within a browser window. The browser's address bar shows the URL: `surveyvideo.move4u.com/?taskId=68a85a60-b380-4805-b1b1-3c10afcd08ac`. The interface includes the SurveyVideo logo, a timestamp of "November 3, 2020 10:24 AM", and a "Live chat" window on the right. The main area features two video feeds: "CLIENT VIDEO FEED" (currently black) and "SURVEYOR VIDEO FEED" (currently white). Below the client video feed are two icons: a phone icon and a square icon with a plus sign. A red arrow points to the phone icon with the text "CLICK HERE TO START THE CALL". Below the video feeds, there is a questionnaire titled "Is this your first time doing a SurveyVideo? (1/3)" with radio buttons for "Yes" and "No". A "WALKTHROUGH QUESTIONS" section is also visible. At the bottom right, there are "SAVE" and "SEND" buttons. The chat window on the right has a text input field labeled "enter message" and a "SEND" button.

Click on the Phone Icon to start the call. The first time you use this page, it will request permission to use your microphone and webcam. Grant the access.

Once you are done with the call, click on the same icon (it'll turn red) and the call will finish.

The call is recorded from the time the surveyor clicks on the phone icon to start the call until it the surveyor clicks on the phone to hang up. The recording is a video containing the video feed and audio from the client, the audio from the surveyor. This recording is made available for you and your team in the same move file, in the Media tab.



During the call, you'll have the option to use the chat to text the client. Use the Walkthrough questions as your checklist, things to ask, or do during the call. These questions can be adjusted for each company.

You also have the option to mute your microphone, take screenshots, and maximize the client's video feed.

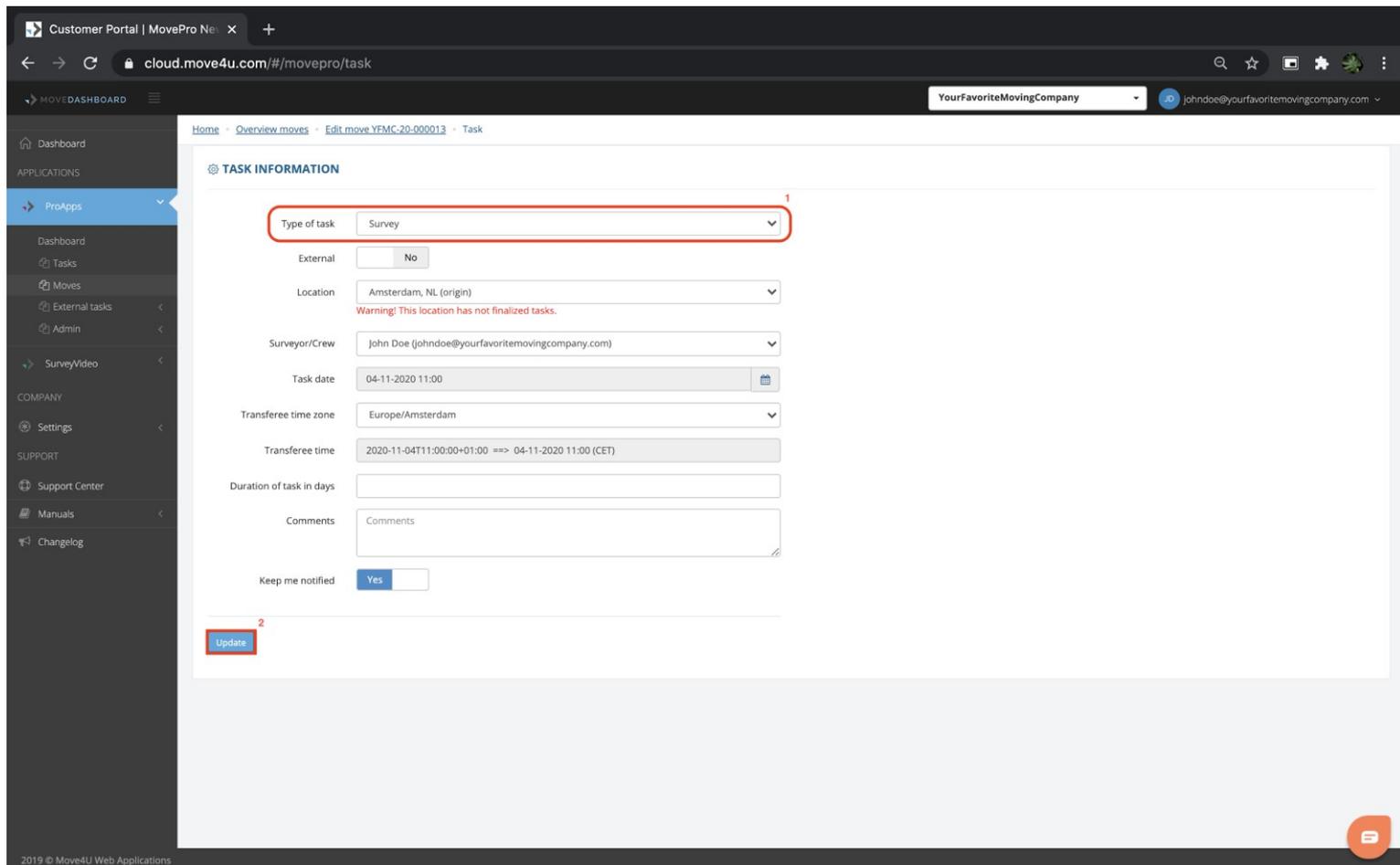
You can associate the screenshot to a particular floor and room, and take notes as well.

All screenshots will be made available in the Media tab of the move file.

6. Cubing options

While you're videosurveying, you can use the MoveDashboard or SurveyPro to cube.

- a) Using SurveyPro? Then schedule another task within the move file. The task type has to be Survey. This will push all the information to SurveyPro, where you can cube during or after the videosurvey.



Customer Portal | MovePro Ne x +

cloud.move4u.com/#/movepro/task

MOVEDASHBOARD

YourFavoriteMovingCompany | johndoe@yourfavoritemovingcompany.com

Home · Overview moves · Edit move YFMC-20-000013 · Task

TASK INFORMATION

Type of task: Survey ¹

External: No

Location: Amsterdam, NL (origin)
Warning! This location has not finalized tasks.

Surveyor/Crew: John Doe (johndoe@yourfavoritemovingcompany.com)

Task date: 04-11-2020 11:00

Transferee time zone: Europe/Amsterdam

Transferee time: 2020-11-04T11:00:00+01:00 ==> 04-11-2020 11:00 (CET)

Duration of task in days:

Comments:

Keep me notified: Yes

² Update

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- b) Using the MoveDashboard? Go to the Inventory tab within this move file, there you have the option to add items. You select the item you need, select the MOT, volume, quantity, crate info, etc.

Tip: You can use Picture-in-picture with SurveyVideo, meaning that you will have the client's video feed hovering on top of your screen, and in the meantime, work the list of items.

Customer Portal | MovePro Edit

cloud.move4u.com/#/movepro/move/e962dc34-f581-4ec8-900f-c48e2e2c2a3f

MOVEDASHBOARD

YourFavoriteMovingCompany | johndoe@yourfavoritemovingcompany.com

Home > Overview moves > Edit move YFMC-20-000013

Summary Client Locations (2) Tasks (1) Allowances General Services Inventory (0) Packing lists (0) Planning Documents (0) Media (4)

Inventory Itemizer High Value/High Risk items Damaged Items

Move4U Inventory list

+ Add inventory item

Show additional filters

Show 10 entries

Item	Quantity	Volume (cft)	Total volume (cft)	Weight (lbs)	In room	Transport type	Origin	Destination	Item / Packing list	Valuable	Actions
No data available in table											
Total:		0	0.00 cft								

Showing 0 to 0 of 0 entries

First Previous Next Last

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If you're planning to cube after the call has taken place, we recommend going to the Move Dashboard and using the Itemizer.

Within the move file, go to Inventory and select Itemizer. Here you are able to rewatch the recording of the survey and add items to the list as you go along.

7. Creating documents

Use the MoveDashboard to create documents. Within each move file, you can go to the Documents tab and click Create document. Select the document from the dropdown and the system will prepare it for you within seconds.

If you have used SurveyPro, upon finalization of the task, the system will create the documents automatically.

The screenshot displays the MoveDashboard interface for a specific move. The browser address bar shows the URL `cloud.move4u.com/#/movepro/move/e962dc34-f581-4ec8-900f-c48e2e2c2a3f`. The dashboard header includes the company name "YourFavoriteMovingCompany" and the user "johndoe@yourfavoritemovingcompany.com". The main navigation tabs are Summary, Client, Locations, Tasks, Allowances, General, Services, Inventory, Packing lists, Planning, Documents, and Media. The "Documents" tab is selected and highlighted with a red circle labeled "1". Below the tabs, the "DOCUMENTS" section features a "Create document" button, also highlighted with a red circle labeled "2". A dropdown menu is open from this button, listing several document types: "Create client summary PDF", "Create Delivery PDF", "Create inventory list PDF", "Create list of cartons PDF", "Create photo pdf", "Create client summary Excel", and "Upload file". Below the dropdown is a table with columns: Date, Created by, Description, Comments, Language, Images, and Actions. The table currently contains no data, with the message "No data available in table" displayed. A search bar and "List" button are located to the right of the table. The footer of the page reads "2019 © Move4U Web Applications".