Move Right Training

Last Updated Dec 2024

For the latest training document please visit moveright.app/training
Jobs V2 is currently under active development and training is subject to change.

Table of Contents

Jobs V2 Release Timeline

☑ **December 4:** New Opportunity page is now available. Legacy estimator is still accessible.

☐ **December 18:** Jobs V2 & Quick Access will become generally available. The legacy estimator will still be accessible. Training on Jobs V2 and the overall workflow will be sent out and be available in the application. Users must start using Jobs V2 by this date.

☐ **January 15:** Legacy estimator will be turned off and phased out.

☐ **January 25:** Legacy estimator will be completely removed from the application.

Creating a new opportunity

In the top-left of the page you will see a new button labelled "+ New Opportunity"

Click this button to access the new opportunity page.
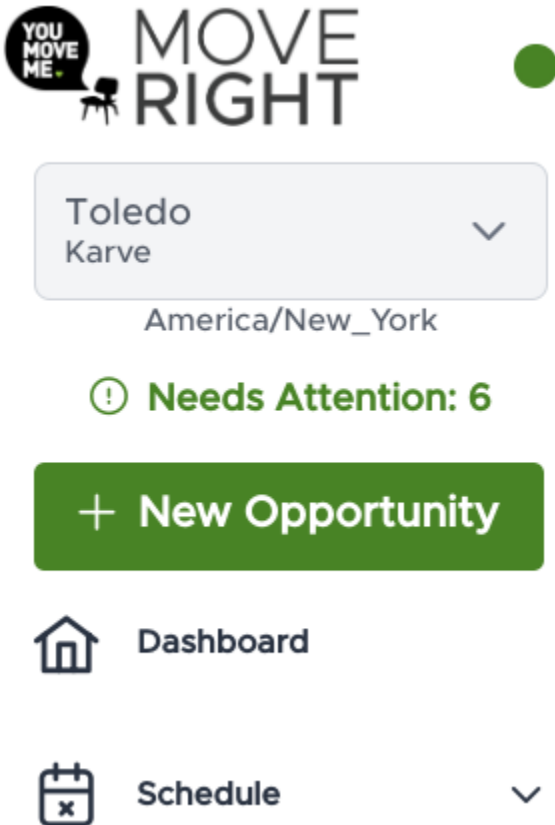
Once you visit this page you'll be greeted with five sections:
1. Customer Details
2. Location Details
3. Inventory
4. Timeline & Availability
5. Summary

Each section is collapsible. You can skip any section except for the name of the customer.

Customer Details

The first section, **Customer Details**, allows you to enter information about the customer:
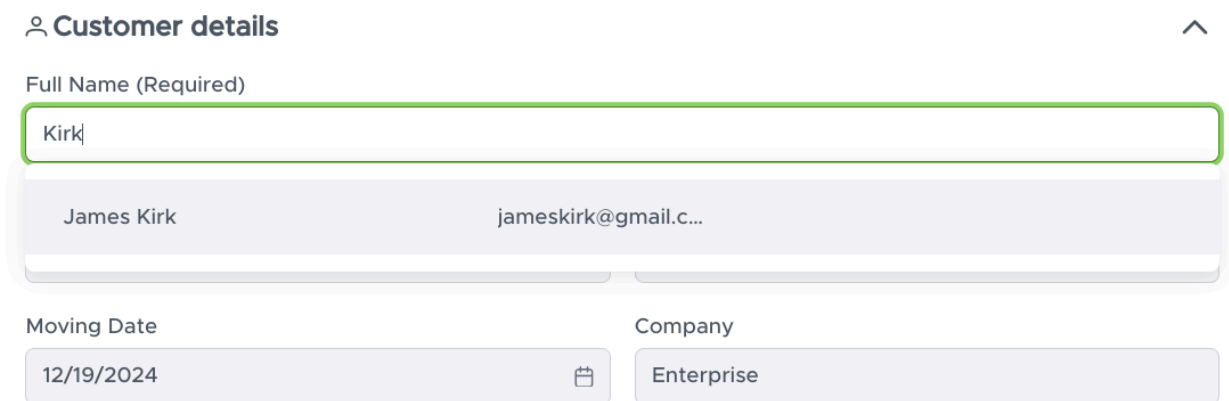
In the above example we have entered new customer information, the customer has provided us with a moving date, and we've entered other meta information such as the type of customer, referral source, and origin.

When typing in name, email, phone, or company you will see autocomplete results - select an autocomplete result to select an existing customer:
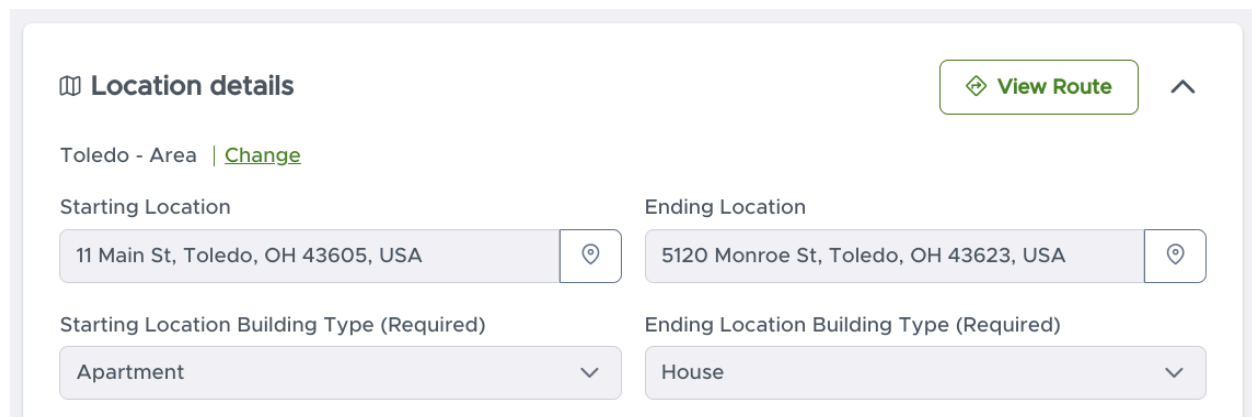
After selecting a customer name, email, phone, and company will be grayed out / disabled. If that customer wants to provide different information click "Edit Customer" to change these fields then click "Accept".

Location Details

Next, collect location information from the customer:

Ensure that you select the location information from the dropdown. Then, you can collect more information about each location if able. In the future, this information will be used to calculate estimates.

Fill in the remaining information about the starting and ending location:

Starting Location Details   Apartment 11 Main St, Toledo, OH 43605, USA

Bedrooms (number) (Required)   Area (Sqft)   Floor

2   1,100   1st/Ground Floor   ⌄

Access Notes

+ Add Stop

Ending Location Details   House 5120 Monroe St, Toledo, OH 43623, USA

Bedrooms (number) (Required)   Area (Sqft)   Storeys

2   1,500   1st/Ground Floor   ⌄

Access Notes

Inventory

Next, you can fill in the inventory if you're able to collect it over the phone using the inventory item list:

Timeline & Availability

This final section can be used to select a specific time for the move which is optional:

Create the job

Finally, click "Create Job" to create this job. This will take you to that lead in Jobs V2.

A few things to note

- At any point you can leave the new opportunity page and come back - your data will be saved so long as you use the same device and do not log out. Note that if you have data in the new opportunity tool it will say "Cont. Opportunity" instead of "New Opportunity"
- You can scroll to the bottom of an opportunity to discard it if required.
- Instead of discarding opportunities if they don't work out we suggest clicking on "Create & Close" instead of discarding the job - this will help improve overall analytics if after capturing the information about the customer over the phone finds that this customer may not be a good fit.
- The legacy estimating tool will remain until January 15 - the new opportunity tool replaces the first 3 steps of that tool. The remaining steps will be replaced by Jobs V2 available December 18. Please learn and understand that tool before we cutoff the legacy estimator.
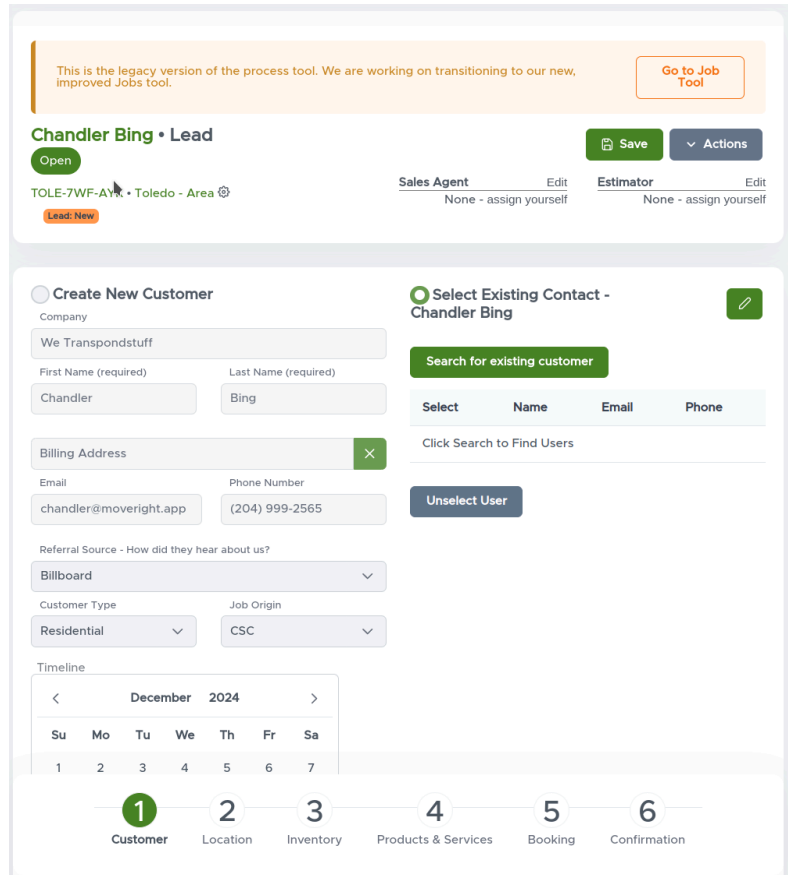
How to go back to the legacy estimating tool

To go back to the old version of Move Right click the three dots in the top right of the job:
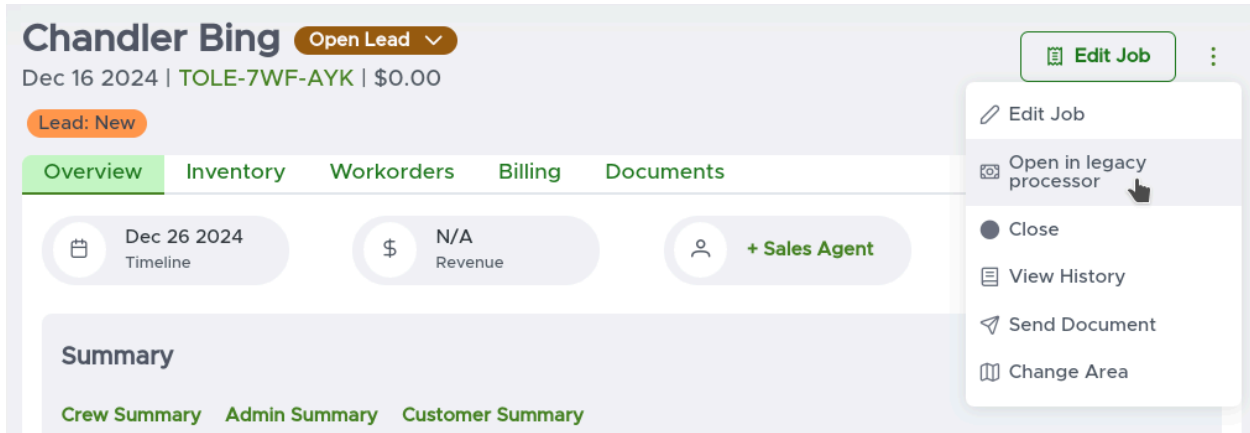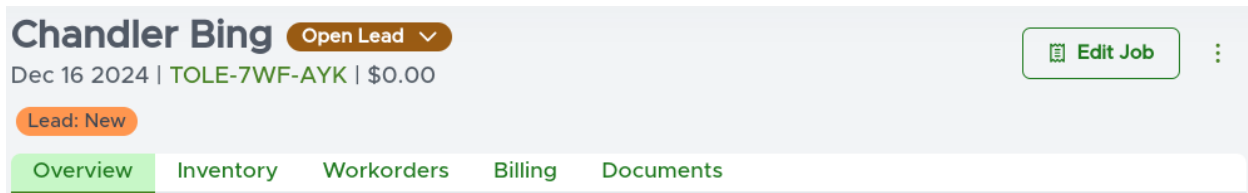

This will bring you back to **THE LEGACY ESTIMATOR:**

Note that this button will be removed in January as we roll out Jobs V2 generally to everyone. This is available in case of any issues as we roll out the new jobs tool.
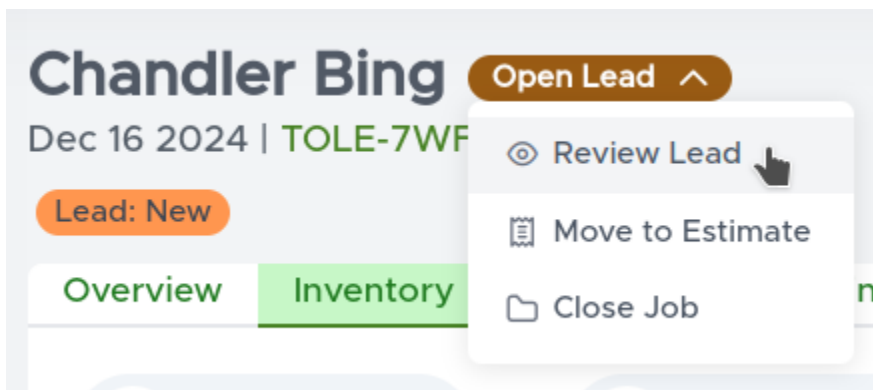
Jobs V2

Each job page shows a header that contains the fundamentals of the job:
- Customer name
- Job status (open, closed, archived, deleted)
- Job stage (lead, estimate, booking, invoice)
- Tags

Clicking the status and stage of the job allows you to review the lead in the opportunity tool, promote the job to a different stage, or close the job with a given reason:


Clicking the three dots in the top right corner allows you to access additional actions for the job such as:
- editing the job (opening it in the new opportunity page)
- opening the legacy processor
- closing the job
- viewing the history
- sending a document
- changing the area of the job

You can click "Edit Job" to open this job in the new opportunity tool (for example, with web leads that were created automatically.
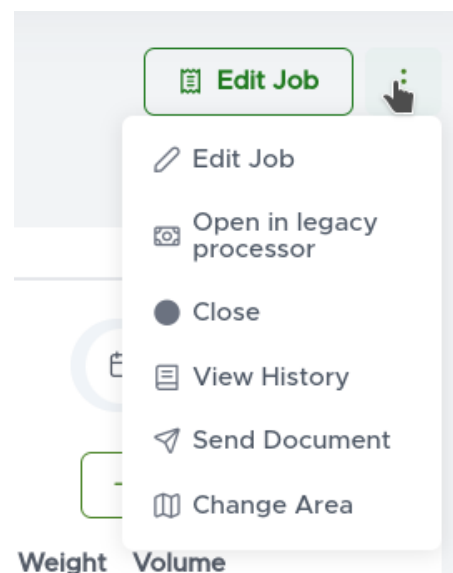
The Jobs V2 page is split up into a few tabs that define its functionality:
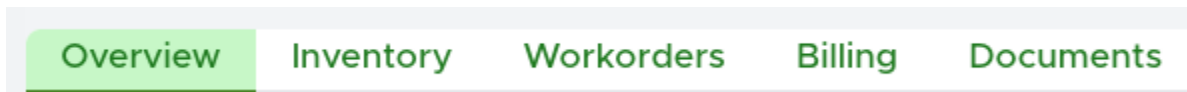
- **Overview:** General job, customer, location, and timeline/booking information
- **Inventory**: Cube sheet & room editing tools
- **Workorders**: Update the events, charges, and discounts associated with a job. Generate estimates and send them to the customer.
- **Billing:** Generate invoices and record transactions, payments, deposits
- **Documents:** Create and upload documents to Move Right

Overview Page

The overview page provides job summary, customer details, location & routing details, and timeline information required to see at a glance information about the job.

The top section of the overview page provides details such as the timeline of the job, total revenue of all events, sales agent, and estimator assignements:
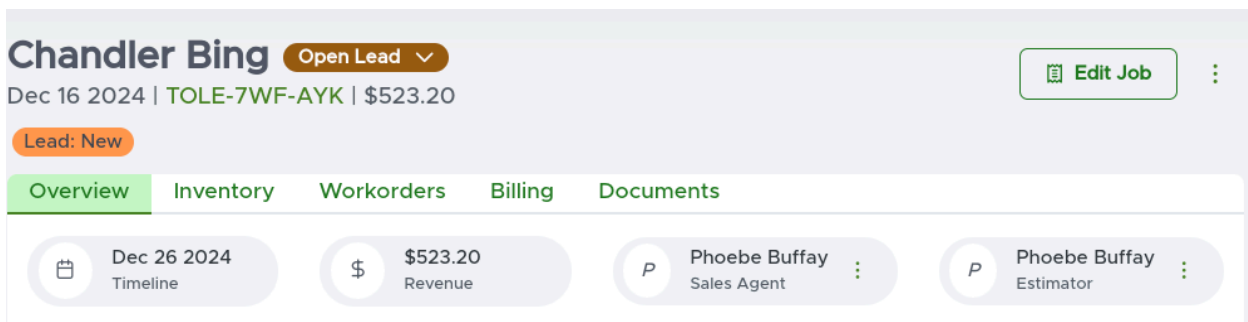
Overview Page - Summary

Each job has three summaries:
- **Admin summary:** Used to record private / internal information. Only shown to office staff, sales agent, operations, and admins. Not seen by crew or customers.
- **Crew summary:** Used to communicate job intentions with the crew. Not seen by customers.
- **Customer summary:** Used to affirm and communicate job intentions to customers. This is the only summary a customer can see.

Summary

Crew Summary   Admin Summary   Customer Summary

Arrival: 8:00 AM at **123 Main Street** (3rd floor, no elevator).

Inventory: 20 small boxes, 15 medium boxes, 10 large boxes, and key items:
- **Couch** (disassembly required)
- **Queen Bed** (use mattress cover)
- **Dining Table** + 4 chairs
- **55-inch TV** (bubble wrap)
- **Glass Cabinet** (blanket wrap)

Instructions: Use boot covers, protect fragile items, and be cautious on stairs. At the drop-off location **456 Maple Avenue** (driveway access), unload as per customer instructions. Verify inventory at both locations to ensure nothing is left behind.

Customer Contact: Phoebe Buffay, (123) 456-7890.

Summaries must be manually pasted for the time being. Summaries are NOT available on the legacy estimator.

Overview Page - Customer Details

This section provides information about the customer:
- Name
- Email
- Phone
- Timeline - when the customer requested the move for
- Customer Type - residential vs commercial
- Job origin - how the customer contacted you
- Source - how the customer heard about you

You can edit the customer information by clicking on the pencil in the top right.

To edit core customer information not pertaining to this job, click "Edit Customer" - when you make changes here you are also making changes to any other jobs this customer may have, so be careful! When completed making your changes, click "Accept" and then "Save"

Be sure to save your changes before you leave!

Overview Page - Locations

Show the different locations for this job, open it in google maps, get directions, view expected travel times, and more.
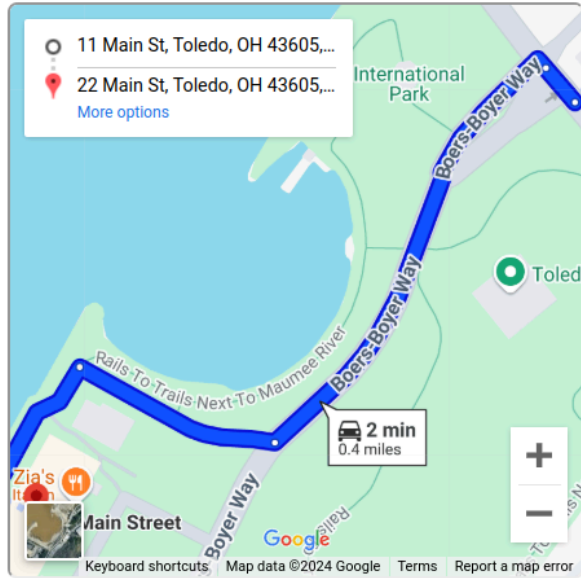

Click the down arrow to expand the information about each location. This section contains:

- Address
- Dwelling type
- Number of bedrooms
- SQFT
- Parking and elevator access
- Directions

Overview Page - Timeline

Use this section to create required events, book them, and make any other necessary adjustments:

To schedule an event, click the "Book" button - this will give you a menu to select the date, start time, and required asset:

Changing the date in the schedule on the right will also change the date being searched!

Check these buttons to include travel time from the dock location. These add extra buffer time to the events to make sure the crew arrives on time.

To edit the duration of an event after booking

To edit the duration of the event after it has been booked click the event on the overview page:

Moving - Booked

Dec 27 2024 - Dec 27 2024 | 9AM - 11AM | 2 hrs | (America/Winnipeg) | 1 Truck
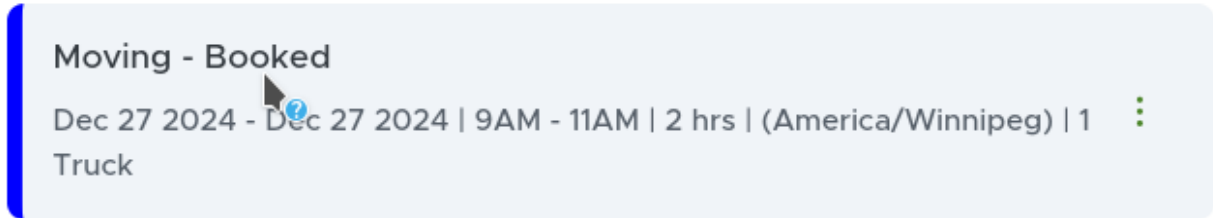
This will open up the right side panel - in the right side panel click Actions > Edit:


Then you can update the duration from the update event dialog:
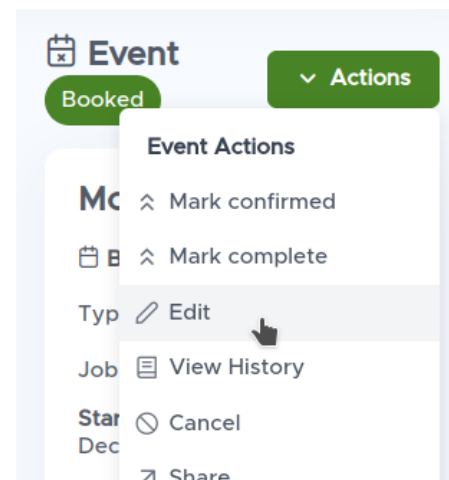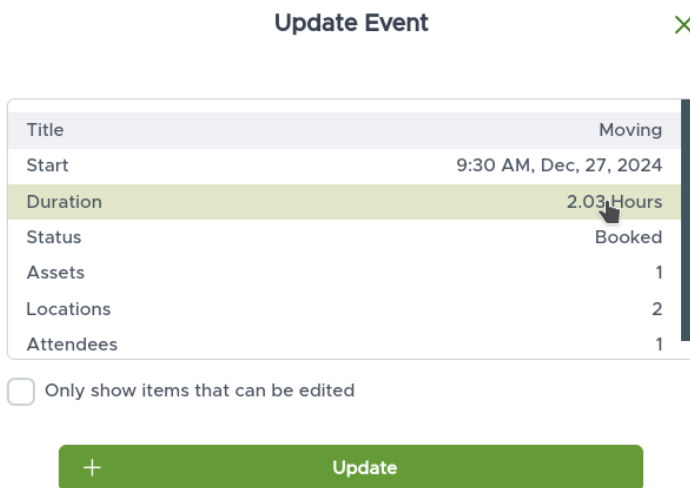
This flow is currently being worked on and will be improved over the next few months. Please contact us if you have any questions or feedback about this functionality!

Complete an event so it can be invoiced

You must complete an event before it can be invoiced. To complete an event, go to the Overview page, click the three dots to the right of an event, then click "Mark complete".
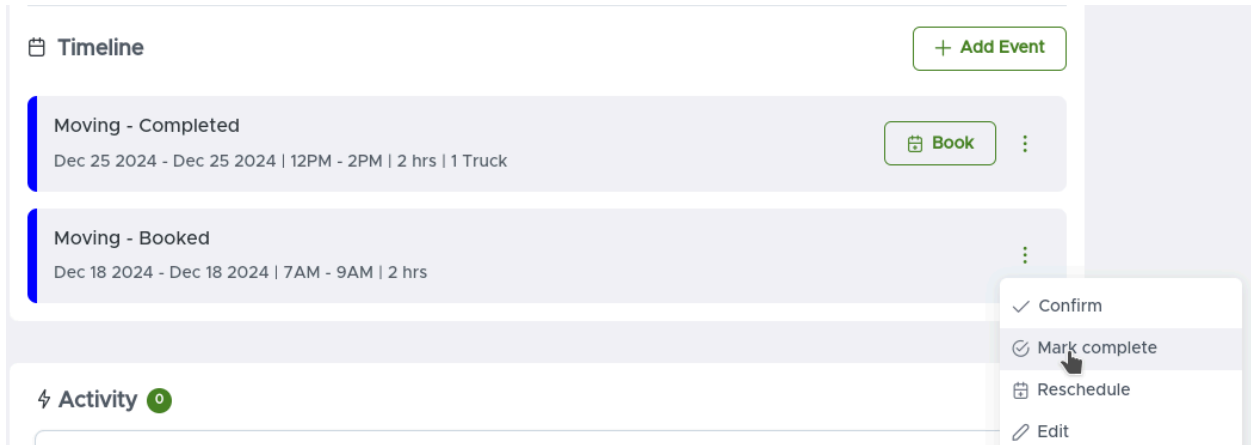
Inventory Page

The inventory page allows you to track # of items, boxes*, weight, and volume based on a cubesheet / inventory list. You can add rooms & items, adjust quantities, adjust item details, and remove rooms & items from this page.

Boxes* is a feature that is coming soon.

Add a room to a job's inventory

To add a room click "+ Add Room" in the top right corner of the inventory.

| Overview | Inventory | Workorders | Billing | Documents |

| | 0 Items | | 0 Boxes | | 0 lbs Weight | | 0 ft³ Volume |

Inventory   + Add Room
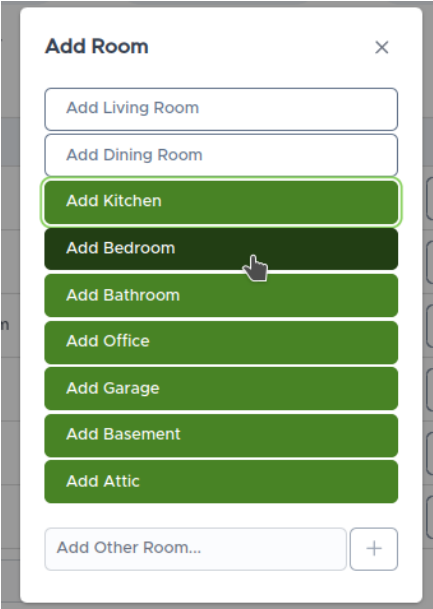
| Item | Quantity | Weight | Volume |

This inventory is empty. Add a room to get started.

Then, click the name of the room you want to add. Rooms that have not been added yet are green whereas existing rooms are grayed out - but you can still add more of them.

You can add a custom/other room not in this list using the textbox on the bottom of this dialog, then press the + button.

After you add the room be sure to save your changes.

Add Room   ✕

Add Living Room

Add Dining Room

Add Kitchen

Add Bedroom

Add Bathroom

Add Office

Add Garage

Add Basement

Add Attic

Add Other Room...   +

Add an item to a room

To add an item to a room start searching for an item in the textbox at the bottom of the page then press Enter or select the item you want to add.

After you add/edit the item be sure to save your changes.

Add a custom item to a room

To add a custom item enter the name of the item at the bottom of a room. Pressing Enter here will add "Plant Stand" instead of Plant - Monsterra so you want to press the Save button (floppy disk icon to the right) instead.
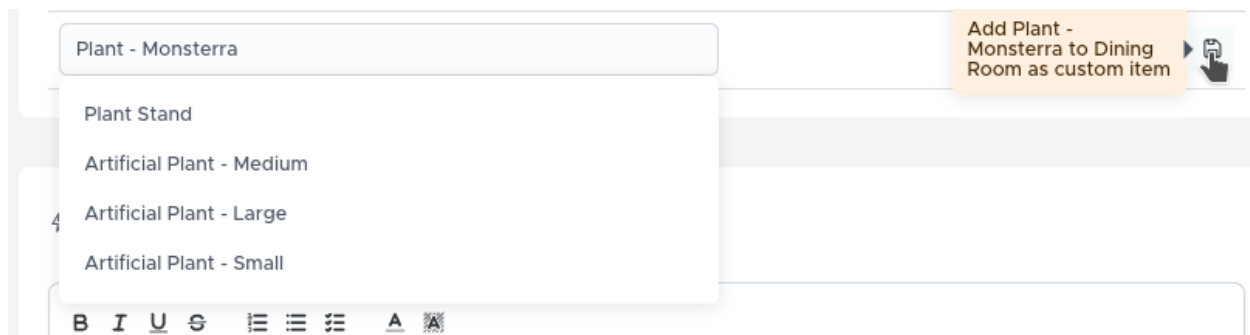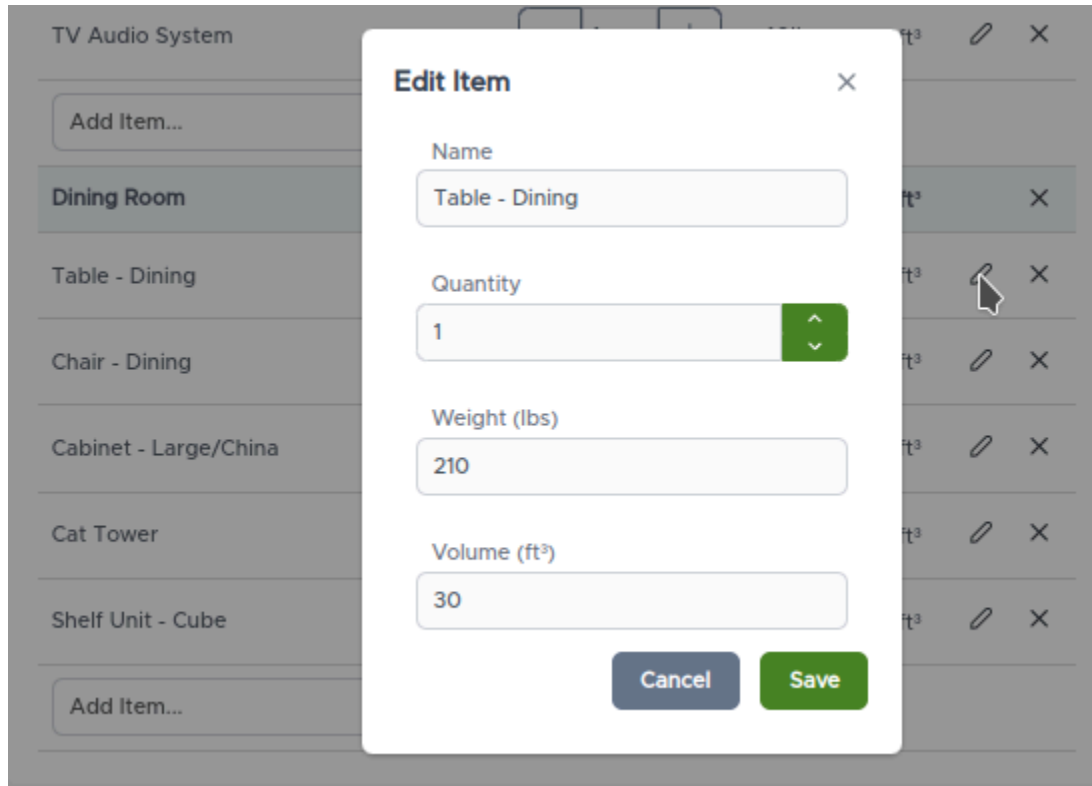

After adding the item you may want to adjust the item weight/volume - see Edit item details below.

After you add/edit the item be sure to save your changes.

Edit item details

Click the pencil icon to adjust item details such as name, quantity, unit weight, and unit volume then click save when done.

After you edit the item be sure to save your changes.

Saving inventory changes

After making changes to the inventory you **must save** those changes to Move Right. To do that, click the "Save" button at the bottom of the screen or the green floppy disk icon in the top right.
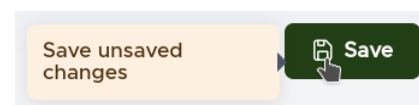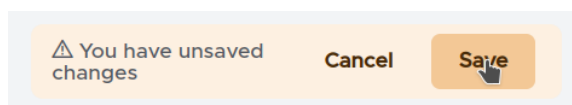
Workorders Page

Update events, charges, discounts, and estimates from this page.

The term "event" can be used interchangeably with "workorder" - workorders ARE events. Events take place on Jobs which you can think of as containers for related events/workorders.

Add an event

Click "+ Add Event" then the type of event you would like to add.
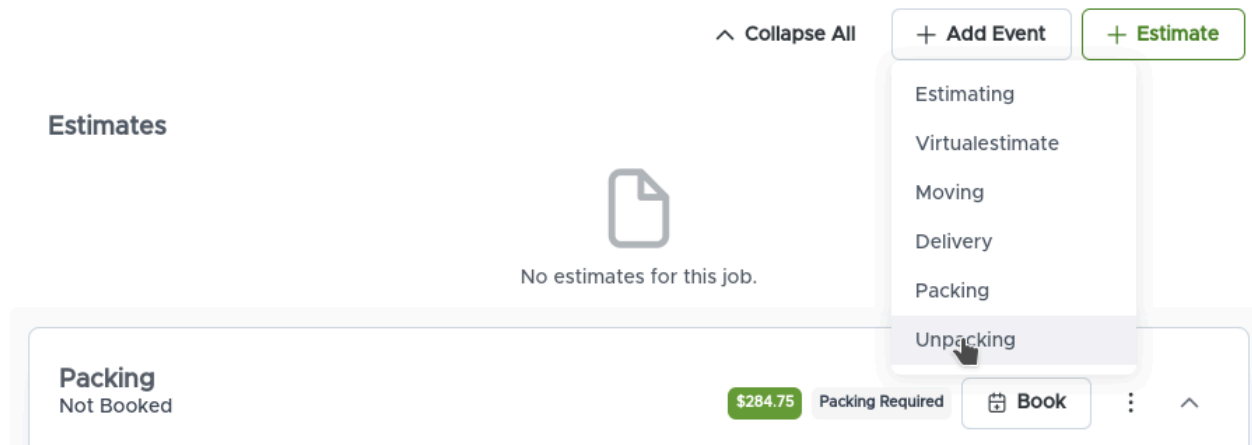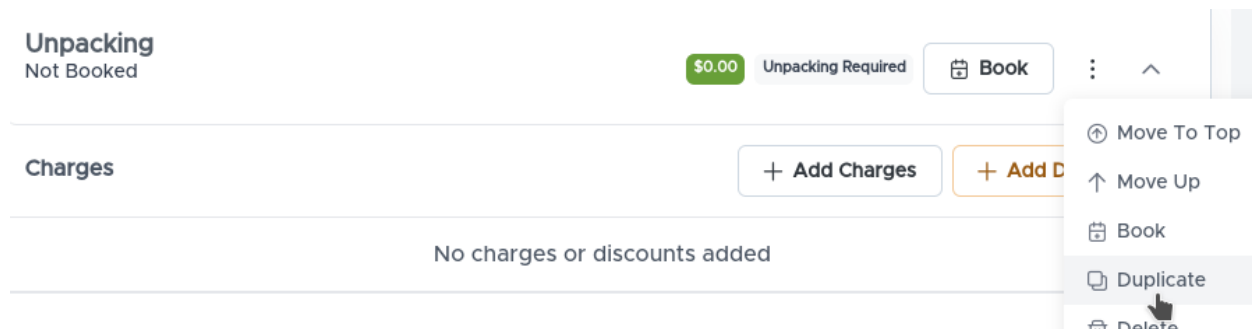

Reorder events

To reorder an event click the three dots and then Move Up or Move Down appropriately

Duplicate events

Click the three dots in the top right corner of the event, click Duplicate, then an event will be created at the end of the event list.

Delete event

Click the three dots in the top right corner of the event, click Delete, then click "Yes"

Book events

Click "Book" next to the event details.

Add charges to an event

Click "+ Add Charges" then click the charges you want to add to this event.

You can adjust the quantity here as well. You can search for specific charges here and the charges you previously selected will remain selected. Click "Add Charges" to add these charges to the event. Be sure to save your changes afterwards.
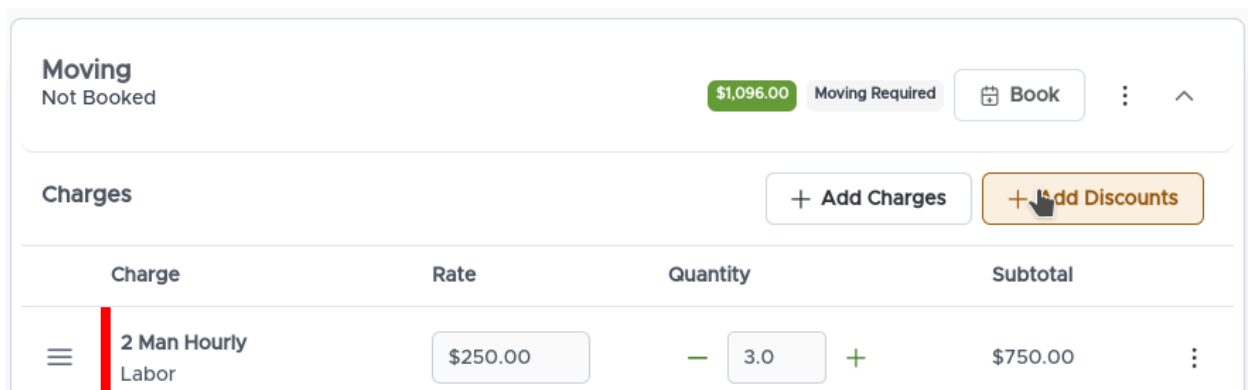
Update charges

On the workorders page you can update the rate, quantity, order, and you can remove the charge.

To update a charge click on a charge to open it in the right side panel. Then, click "Actions" > "Edit". You can update the charge from here.

To reorder a charge grab the handle on the left side of the charge and drag it to the order you would like that charge. You can drag charges between events too!
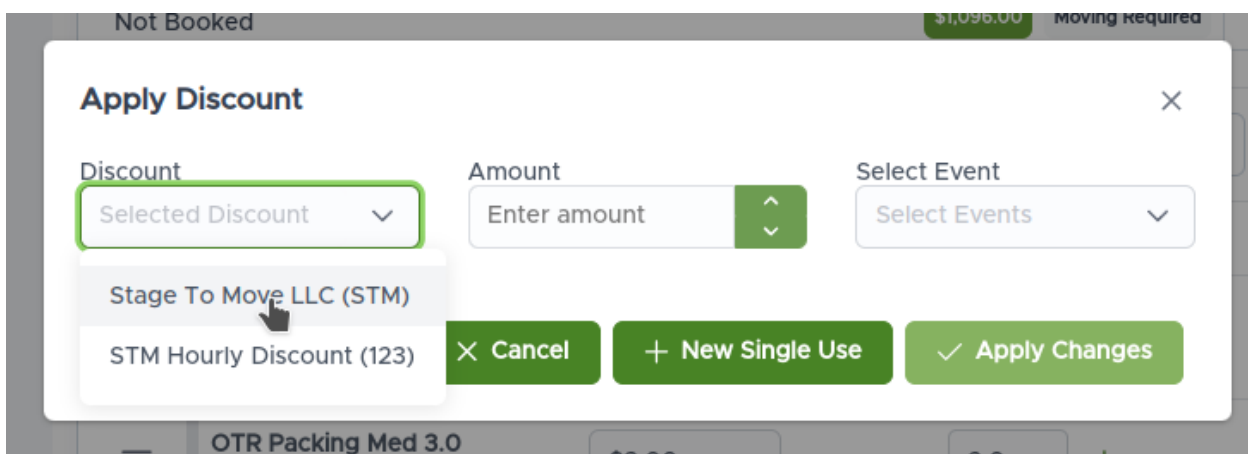
Add a discount to an event

To add a discount click Add Discounts.

You can select an existing discount already in the system or a single use, custom discount specific to this event. Be sure that an amount and event is selected before you apply changes.
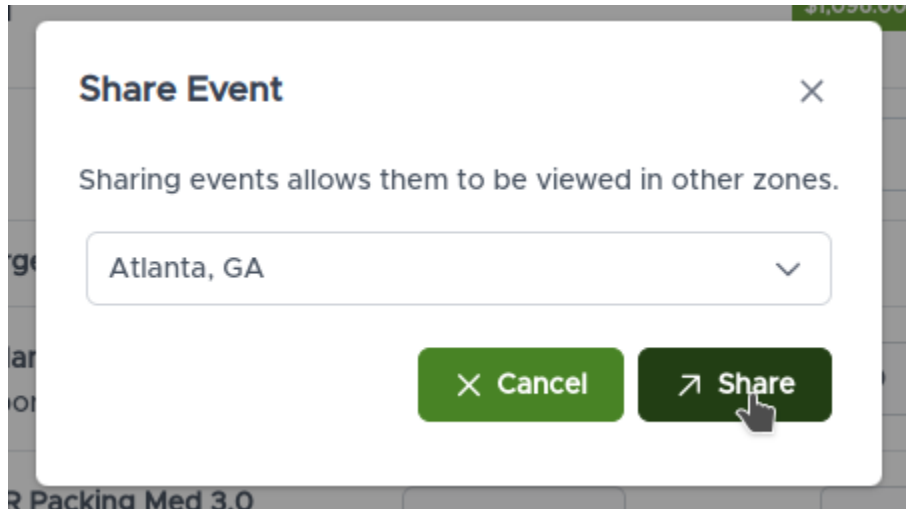

When creating a single use discount be sure to set an amount.

Share an event with another zone you have access to

In the top right corner of an event, click the three dots then click "Share" to open the Share Event dialog. Then, select a zone(s) you want to share this event with and then click "Share"

Share Event   ✕

Sharing events allows them to be viewed in other zones.

Atlanta, GA   ⌄

✕ Cancel   ↗ Share

R Packing Med 3.0

View event costs and profit

Click "Show Office Information" at the bottom of an event to view zero-value lines, damages, cost, and margin metrics on this job.

- **Cost:**
  The cost of goods sold (eg fuel, labor, etc) - does not include other overhead.
- **Gross Margin:**
  Gross Margin (gross profit) is your sub total minus your costs of goods sold (expenses)
- **GPM:**
  GPM (Gross profit margin) is the difference between revenue and cost of goods sold, divided by revenue.

Financials

	Event	Job
Charges	$2,190.00	$2,190.00
Discounts	$0.00	$0.00
Total	$2,190.00	$2,190.00
Hide office information		^
Taxes	$0.00	$0.00
Damages	$0.00	$0.00
Cost	$500.00	$500.00
Gross Margin	$1,690.00	$1,690.00
GPM	77.17%	77.17%

Create & send an estimate

Once you've added your charges to each event and are happy with how this will be presented to the customer click "+ Estimate" to create and send a new estimate. This will immediately start generating an estimate. Once generated, click "Review and Send ->"

You can preview the estimate here by clicking View on the right side of this dialog:
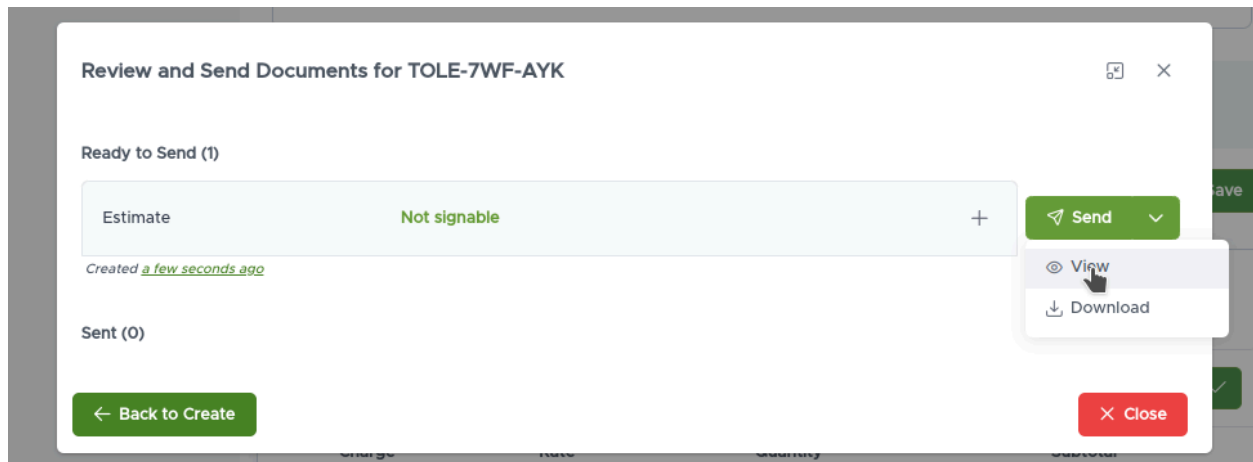
Once you're happy with this estimate, click "Send" to send it to the customer for signing.

Once they've signed the estimate it will appear in this screen as "Signed"

You can view the estimate as an employee or as a customer to sign this estimate on site.

Billing Page

The billing page is used to manage payment collection once a job has been completed.
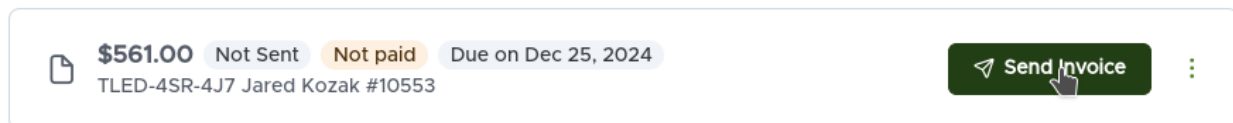
Record a deposit

On the billing page click "+ Transaction" and ensure the type is Deposit. Enter the amount and type of the transaction.

Create & send an invoice

Go to the billing page and click "+ Invoice" then make sure the correct event is selected. You can only invoice completed events.
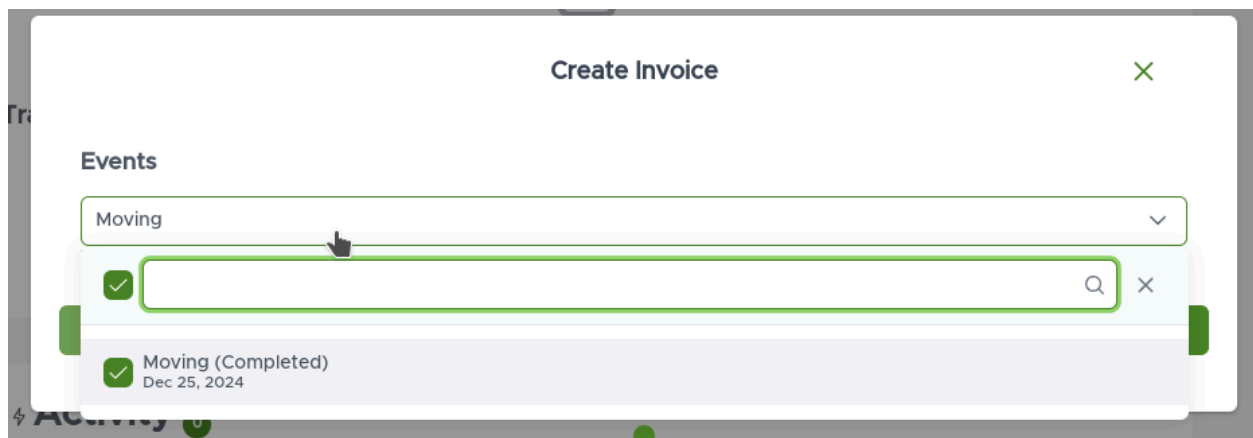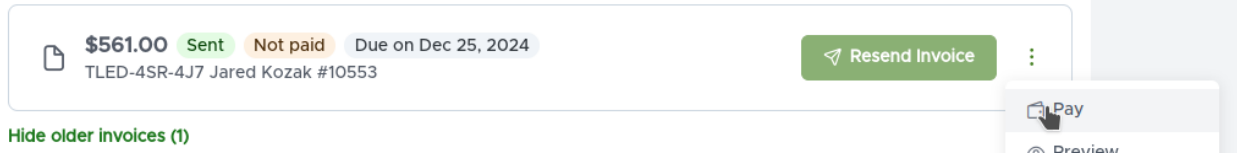

Once created the invoice document will generate. Once generated (takes ~8 seconds) click Preview to view a preview of the invoice then click "Send Invoice"
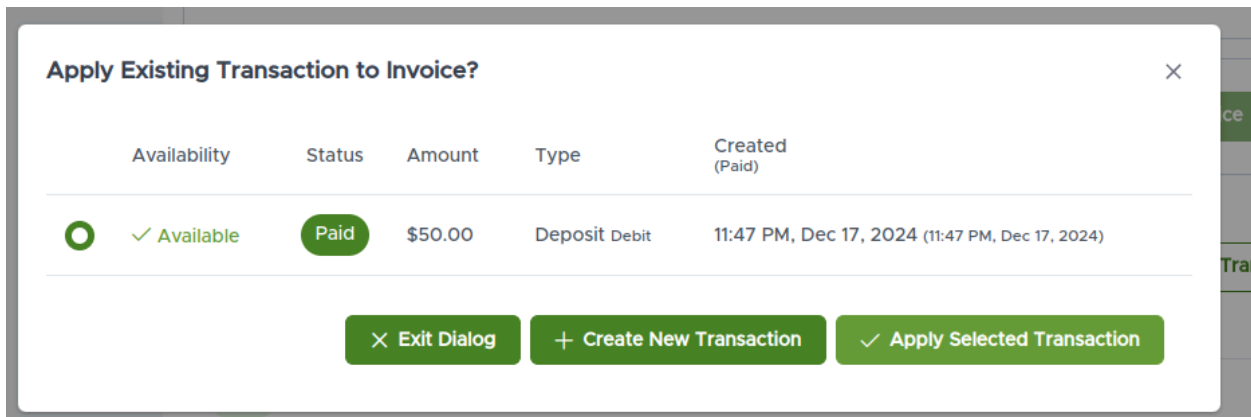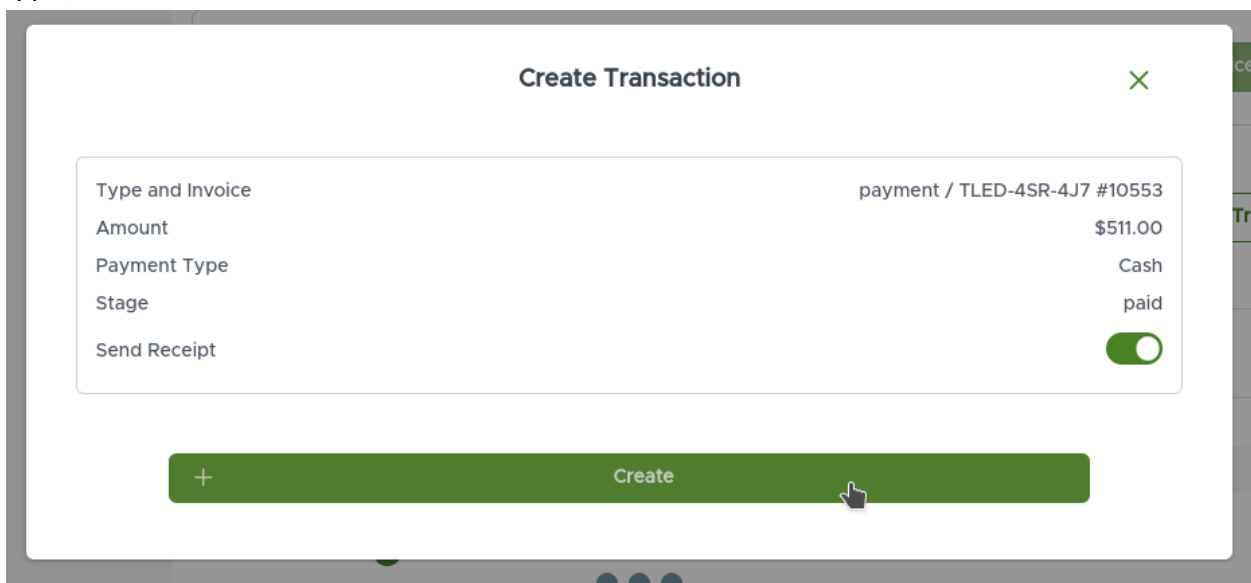
Pay for an invoice

Click the three dots to the right of the invoice then click "Pay"

$561.00 Sent   Not paid   Due on Dec 25, 2024   ⬈ Resend Invoice   ⋮
TLED-4SR-4J7 Jared Kozak #10553

                                                                              📋 Pay
Hide older invoices (1)
                                                                              ⊙ Preview

If you have an existing deposit you can apply it to your invoice. Be sure to select it:

Apply Existing Transaction to Invoice?   ✕

	Availability	Status	Amount	Type	Created (Paid)
○	✓ Available	Paid	$50.00	Deposit Debit	11:47 PM, Dec 17, 2024 (11:47 PM, Dec 17, 2024)

✕ Exit Dialog   + Create New Transaction   ✓ Apply Selected Transaction

Click the button again to pay the remaining balance. Ensure the type is "Payment" and that your invoice is selected. Enter the amount being paid, the transaction type, and review the transaction. Then click "Create"

Create Transaction   ✕

Type and Invoice	payment / TLED-4SR-4J7 #10553
Amount	$511.00
Payment Type	Cash
Stage	paid
Send Receipt	🟢

+   Create

● ● ●

Invoices that are already created will not have the paid total applied.

Record a transaction

On the billing page click "+ Transaction" and select the type.

You can record a deposit (a transaction without an invoice) or a payment (a transaction applied to an invoice) using this dialog. You can also create a refund to subtract the paid total.
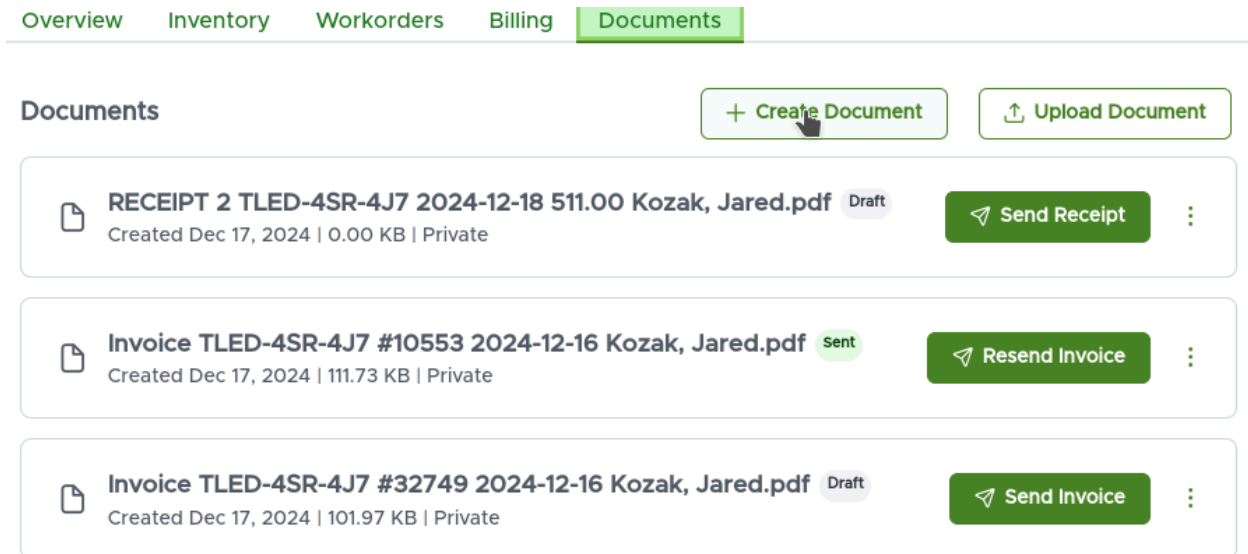

Ensure you enter an amount and payment type. You can optionally send a receipt along with this transaction.

Documents Page

The documents page is a sort of drop box for all your jobs files. Use it to create contracts and other documents or upload files such as spreadsheets and photos.

Create a document (contract, BOL, etc)

Click "+ Create Document"

Then click "+ Add Document to Create" then select the document you want to create:
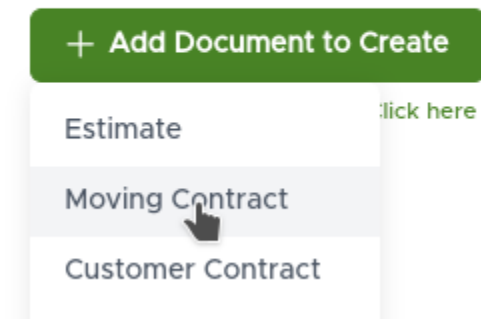
Click "Create" and wait for the document to generate (10 seconds max). Click Review and Send.

Click "View" to preview the document before sending it to the customer. Click Send to sent the document as an e-sign link to the customer and employee.

To "sign as employee" or "sign as customer" you must first send the document to the customer. Those buttons will automatically send the document to the customer and open a window for signing the document in Move Right.

Upload a file

Click "Upload Document" then click "+ Choose" and select a file from your device.
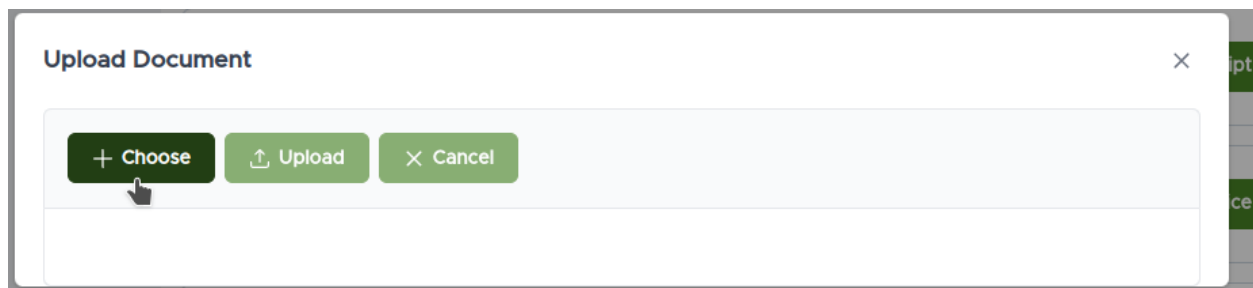
Click "Upload" - once the file is uploaded you can close the dialog and you'll see it in the list of documents.

Quick Access

The quick access system speeds up your workflow.

Click a quick access item to open up it's Jobs V2 overview page. Recent quick access items are currently limited to 3 jobs.

We've **deleted loading** for quick access items - quick access items are stored locally, so you can access them instantly and they are available offline.

The legacy estimator will be deprecated on January 15, 2025. That means that the quick access system will be the only way to access your old jobs.

Future versions of the quick access tool will allow you to pin jobs and for crew/estimators show you "Today's Jobs".
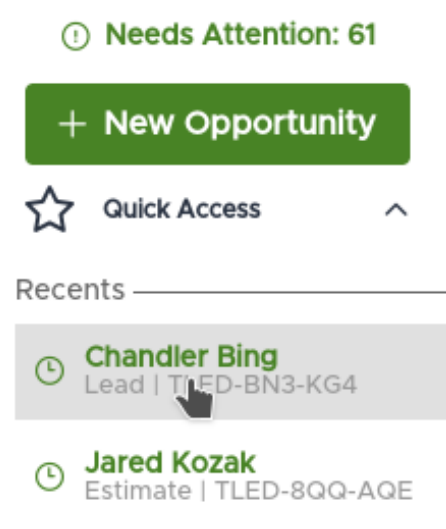
Job Activity

Comments and high level history items are available in the job activity section.

The latest comments are shown at the top of the page.

In the future, this place will be where you'll record calls and can send/receive Email & SMS messages from. You'll also be able to visit this part of the page to view job history.

Add a comment to a job

You can record a comment about a job in the activity section.

Reply to a comment

Jared Kozak · a few seconds ago   Estimator Author

A note about this job goes here.

• You can **format** notes

A demonstration of numbered lists:
1. This
2. Is
3. A
4. Numbered
5. List

TODO:
☑ Make a checklist
☐ Create a tutorial on how to make checklists

Colors are somewhat supported

Bold, *italics*, underlined, strikethrough formatting is all supported.

Collapse Replies

B I U S   ≣ ≣ ⧉   A ⧉

This is a reply|

Add Comment   Cancel

Edit a comment

Click the pencil edit icon, make the change, then click Save Comment

Jared Kozak · a few seconds ago   Estimator Author

This is a reply

Reply...

Copy comment timestamp

You can copy the timestamp of a comment by clicking the timestamp of the comment.