

SBL OnSite Inspection Application

Job Aid for Seller Servicer Inspectors

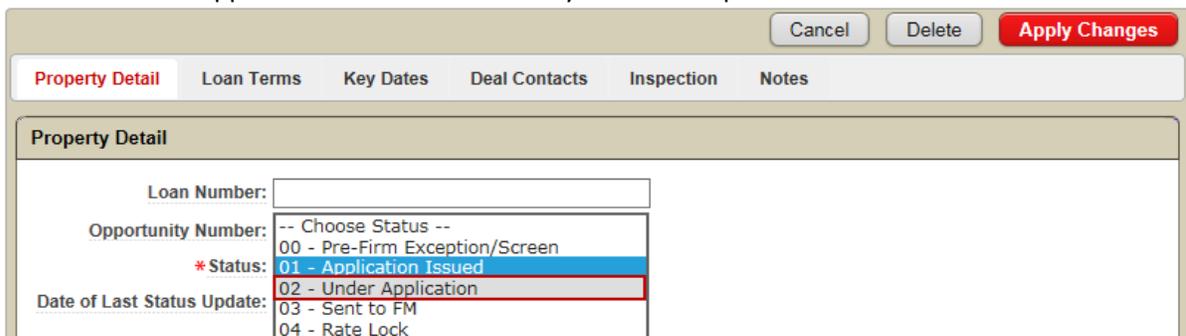
Accessing mobile application and web interface powered by HappyCo



PREPPING FOR AN INSPECTION

Before an inspection can begin, Seller Inspection Admins must make the inspection link available to field inspectors. Inspections conducted by Seller Servicers are accessed by a URL link found in the push notification email or via seller dashboard feature at <https://manage.happyco.com>. The designated inspection admin for your organization will have access to the inspection dashboard.

1. Once a deal is won, ensure the property is entered into [Pipeline](#) and status has been updated to '02 – Under Application'. This informs our systems an inspection is needed.



2. HappyCo and Pipeline systems will sync to make the inspection template available for user access. It may take a day to appear in your [Seller's dashboard](#)
3. Once sync'd, admins may forward the email notification or send the URL link from the dashboard to field inspectors, the properties are organized by stage, region and state.



REGION	STREET	CITY	STATE	SCHEDULED FOR	LINK
SE	101 S Jasper St, Little Rock, AR	Foley	AL	2018-03-09	https://inspec...
SE	1000 Wiggins St, Decatur, GA	Decatur	AL	2018-01-11	https://inspec...
WE	101 S Alvarado St, Tucson, AZ	Tucson	AZ	2018-01-24	https://inspec...
WE	2016 S South Mountain Rd, Phoenix, AZ	PHOENIX	AZ	2018-02-16	https://inspec...
WE	2016 S South Mountain Rd, Mesa, AZ	Mesa	AZ	2018-06-12	https://inspec...
WE	1100 S 10th St, Tucson, AZ	Tucson	AZ	2018-01-11	https://inspec...
WE	2016 S South Mountain Rd, Tucson, AZ	TUCSON	AZ	2018-01-11	https://inspec...
WE	2116 21st St, Tucson, AZ	Tucson	AZ	2018-01-11	https://inspec...
WE	1000 S 10th St, Tempe, AZ	Tempe	AZ	2018-01-11	https://inspec...

4. If the inspection needs to be scheduled urgently before the systems can sync, please contact your Freddie Mac SBL Regions Inspection POC to have an inspection link manually pushed for your immediate access.



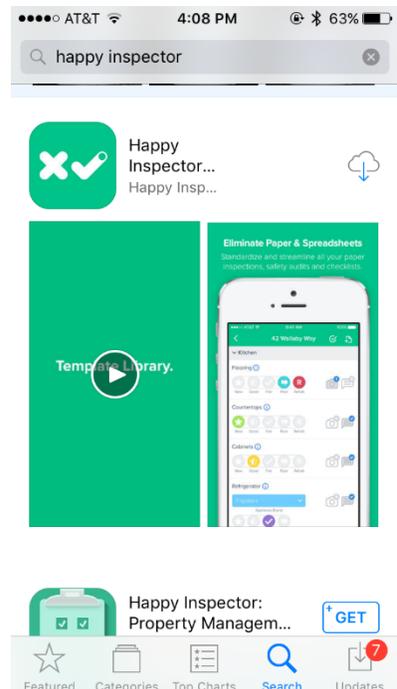
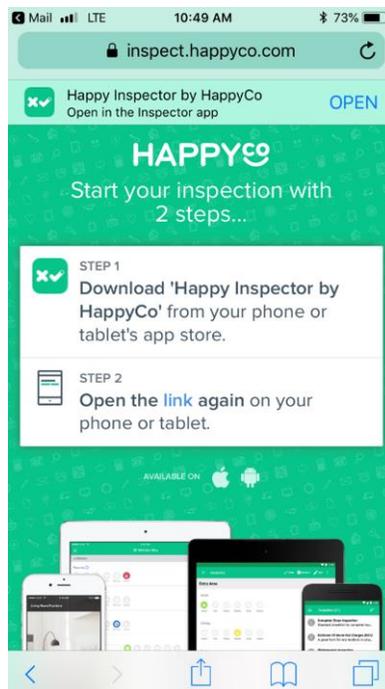
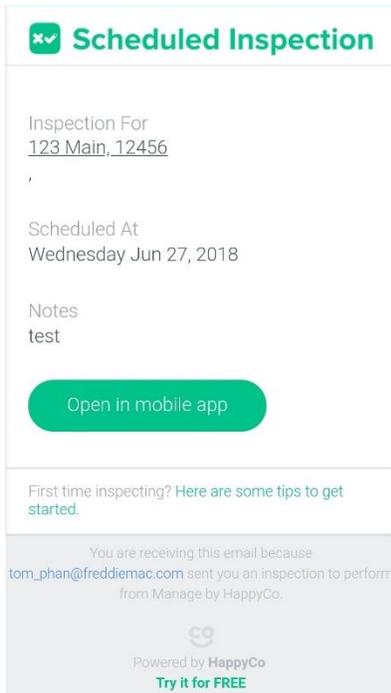
INSPECTING THE PROPERTY

Seller Servicer inspectors can only access the subject property inspection report via unique URL link pushed by their organizations inspection admin. The contents of that inspection report can be lost if the link is accessed and overridden by a user post-inspection.

5. Open the pushed inspection email and verify you are accessing for the correct property. Click on the green “Open in mobile app” button to proceed.
6. Follow the instructions in your internet browser to open up the inspection template in the app. It is recommended to complete this prior to arriving to the site inspection.
7. First time users may need to install the ‘Happy Inspector’ app from their native app store and open the link again as noted in ‘Step 2’

NOTE:

Some devices may have additional security settings that will need permission to open the link from the Inspector app. See example of permission notification below

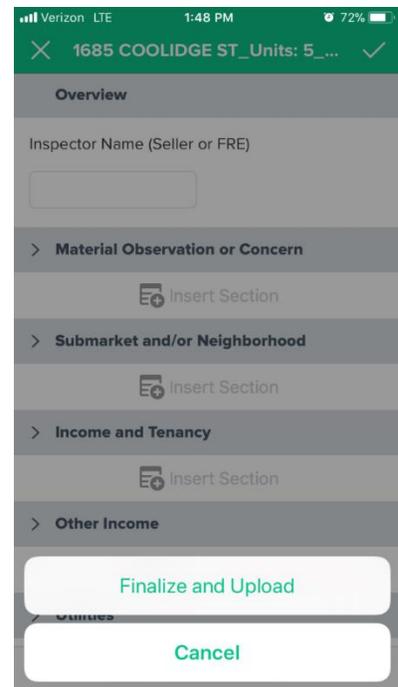
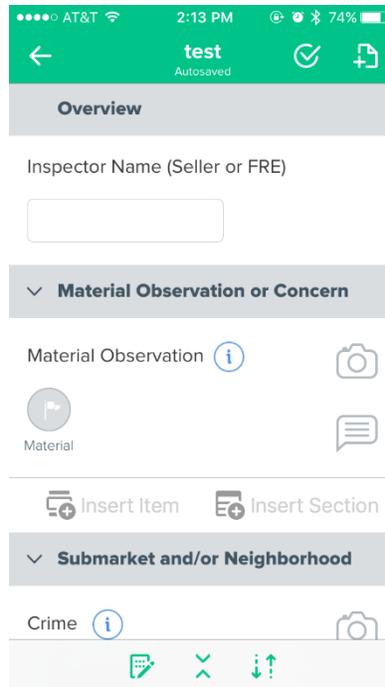


- Once the Property Inspection is loaded up, click on “Start Inspection” button when you are ready to start the subjects physical property inspection.

NOTE:

The inspection template is comprised of a series of flags, rating buttons, photos and open field note sections and has been organized in order of typical inspection flow starting from the front of the subject property into the individual units.

- Complete all applicable sections of the template as complete and accurate as possible. The inspector can insert sections to the report as necessary based on individual property characteristics.
- Include photos to support the findings from your inspection walk thru. All photos taken with the app are 1280 x 1280 pixels, regardless of landscape or portrait mode.
- Finalize the report upon completion of your inspection from the HappyCo App. **All data is lost if the inspection is closed prior to finalizing.**





POST-INSPECTION

Once the inspection report is finalized, Inspection Admins may access Seller’s dashboard to access the completed inspection reports and its photos for use in delivery package.

- 12. Seller Inspection Admins can log into <https://manage.happyco.com/> from the desktop internet browser to access the completed inspections.

NOTE:

The completed inspection report link will be made available within a day from finalizing the inspection as the systems are synchronized.

- 13. Locate the Inspection Report in the ‘Recently Completed Inspections’ section of the seller dashboard. Click on the Report link to pull up the report.

Recently Completed Inspections

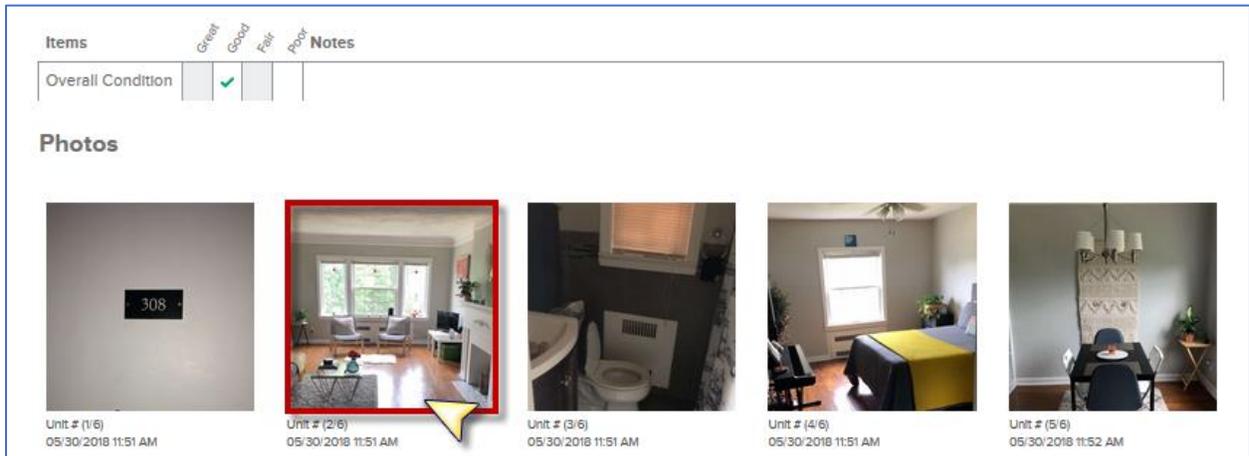
	REGION	ADDRESS	COMPLETED	REPORT
89	NE	118 BRIDGE ST_Units 12, 13...	2018-04-20	https://mana...
90	SC	1800 Johanna Dr_Units 44...	2018-05-30	https://mana...

- 14. Inspection photos are embedded in the report and can be selected to access full size jpg versions by clicking on the desired photo.

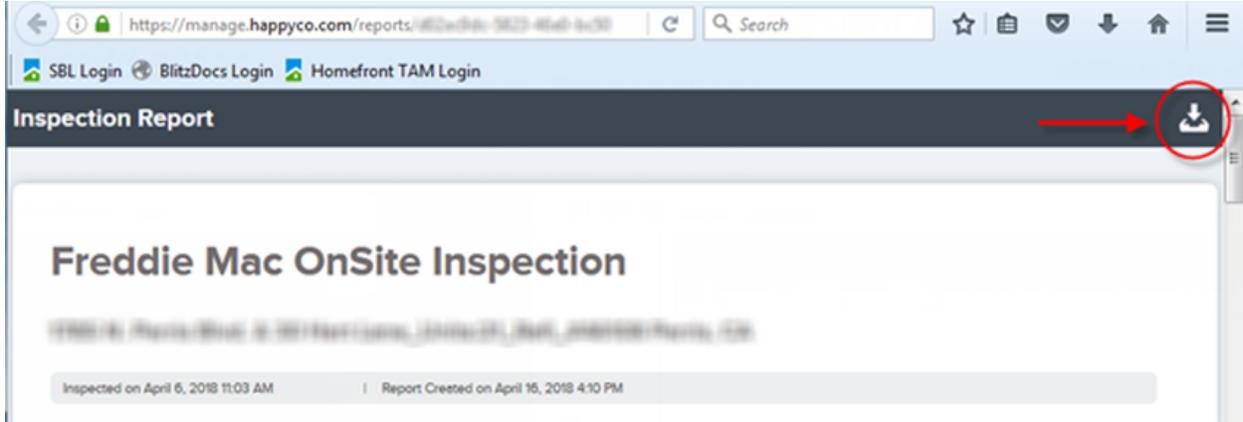
Items

Overall Condition Great Good Fair Poor

Photos

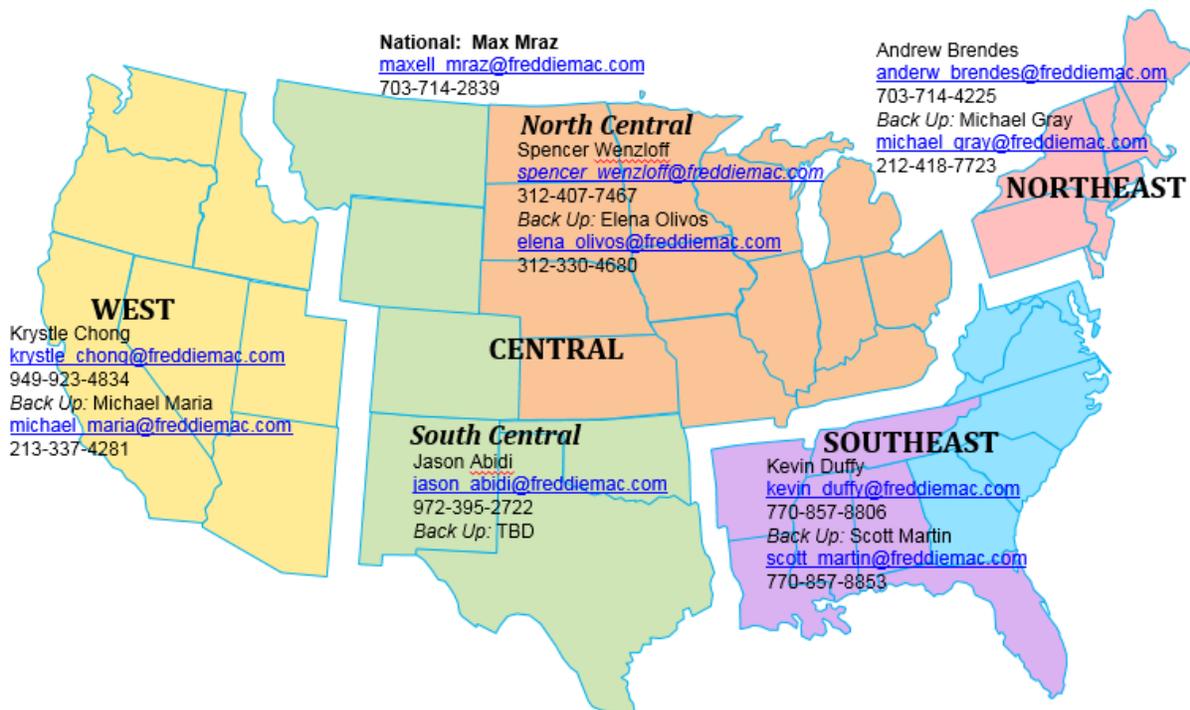


- Download Inspection Report to a local folder using the download icon located in the upper right-hand corner



- Locate the deal in the Document Management System (DMS) and upload the Inspection Report

NOTE: If you have any issues please feel free to contact your Freddie Mac SBL Inspection POC.



FAQ

Q: Do I need to complete all sections in the inspection template?

A: No, the templates are pre-populated based on a typical property inspection; however, some sections may not be applicable to the property and should be left blank.

Q: I am inspecting a property and have not received the pushed inspection link for the subject property.

A: Ask your organization's inspection admin to forward the link. If the inspection is urgent, contact the FM inspection POC to have the inspection manually pushed. If you are experiencing a technical issue, please direct your questions to the Freddie Mac helpdesk.

Q: Can I edit reports post-inspection?

A: Currently, sellers do not have the ability to edit their inspections once they have been submitted to HappyCo. If an inspector needs more time to finish an inspection, we recommend the inspector leaves the app open (the app will remain open if you press home on an iPhone), until they can return to it later.

Q: Can I collapse portions of the inspection report once it is completed?

A: Yes, select the two arrows that face each other (1) to collapse sections of the report. Select the parallel arrows (2) to use Quick Scroll. Quick Scroll allows users to jump to different sections of the report through a list.



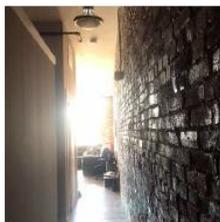
Q: Can I save individual pictures from my inspection report?

A: To save pictures from your report, click on the embedded photo you want to save.

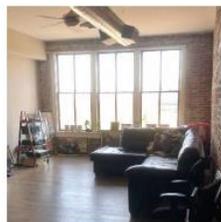
Photos



Unit #
04/17/2018 10:32 AM



Overall Condition (1/7)
04/17/2018 10:33 AM

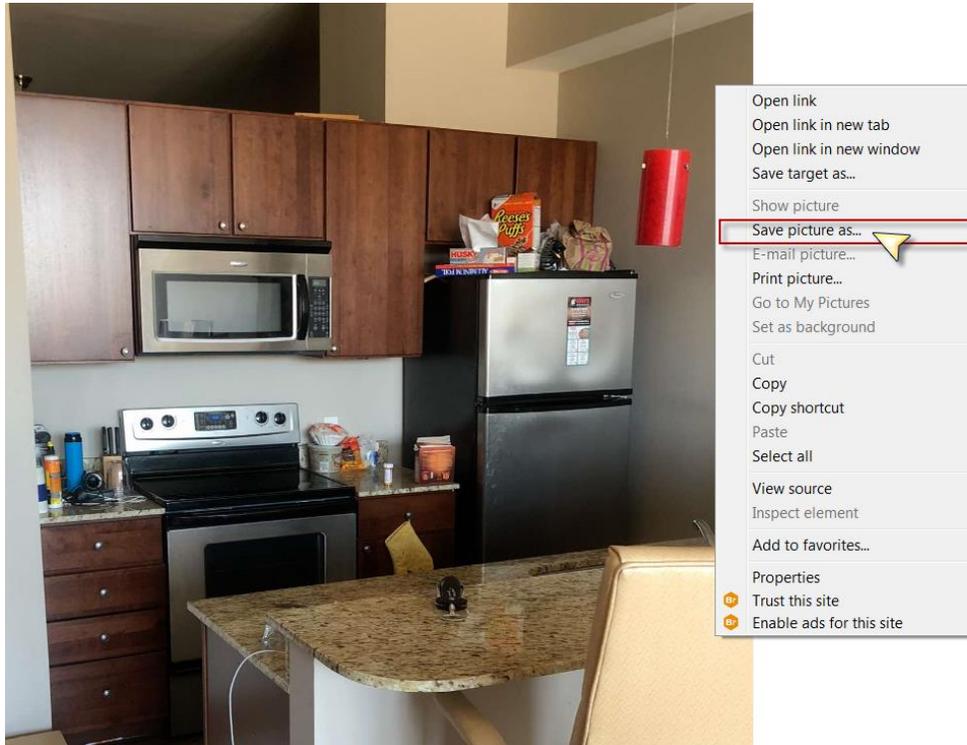


Overall Condition (2/7)
04/17/2018 10:33 AM



Overall Condition (3/7)
04/17/2018 10:33 AM

Once the image has loaded into your internet browser, right click the image and select “Save picture as...”



Q: I’ve finalized my deal, why is the inspection report is not showing as completed in my admin’s dashboard?

A: After completing an inspection, sync all reports using the cloud icon in the upper right corner of the HappyCo app. This will ensure that all information completed by the inspector displays across all the HappyCo inspection report platforms.

Q: I’ve filled out an inspection report for the wrong address, what should I do?

A: Complete and finalize the inspection report to ensure you do not lose any of the photos and notes taken during the inspection. After you have finalized the report, write a memo addressing the incorrect header and attach it to the report. After you have completed both steps, reach out to your Freddie Mac POC for further instruction.