



Optigo Happy FAQs

We've compiled the most frequently asked questions regarding Optigo Happy, our premier digital inspection platform.

What types of accounts are there?

Multifamily has **three** account types: Conventional, SBL and Specialty. Targeted Affordable Housing (TAH), Structured and Seniors Housing product lines are included within the Specialty account; lenders only need one account to access everything in Specialty.

What's the pricing of Optigo Happy accounts?

There's a one-time set-up fee of \$5,000. The first product line account is \$1,000 per month. Each account you add for a new product line is \$500 per month.

How do I download the app?

The HappyCo Inspector app is available on [Google Play](#) or the [App Store](#). Once an inspection has been started in the app, it can also be finished or reviewed on a desktop at <https://manage.optigohappy.com/>.

Can I complete virtual inspections using Optigo Happy?

Yes, [virtual inspections](#) are now available to all account types including Conventional, Specialty, and SBL. Contact [Eric Beasman](#) for additional info.

What should I do if I have a technical issue or need support?

You can visit the [Optigo Happy Service Desk](#). At this help center, you can submit a ticket or call the support line for immediate assistance.

How many devices can I use the app on?

You can access the app through a smartphone, iPad and on your desktop. You can also use Android tablets that run a full Android operating system – tablets that utilize a light version of the Android OS are not compatible, i.e., Kindle Fires.

Although there are multiple ways to access Optigo Happy, inspections must be initiated within the Happy Inspector app. Inspections can then be edited on desktops afterward.

Can third parties, like engineers, appraisers, etc., complete inspections on the app?

Today, only Optigo® lenders and Freddie Mac Multifamily staff can use Optigo Happy for inspections. We are looking for the best way to include engineers and appraisers in the future.

What should I do if the inspection on my app is not syncing with the web?

Start by dragging down on the inspections screen to refresh and sync with the cloud. You can confirm you have synced by checking the Sync tab on iOS and the Cloud tab on Android.

Do NOT uninstall and reinstall the application for issues syncing. This will result in losing the data on your device that has not synced to the cloud.

Can I come back and add to my existing inspection?

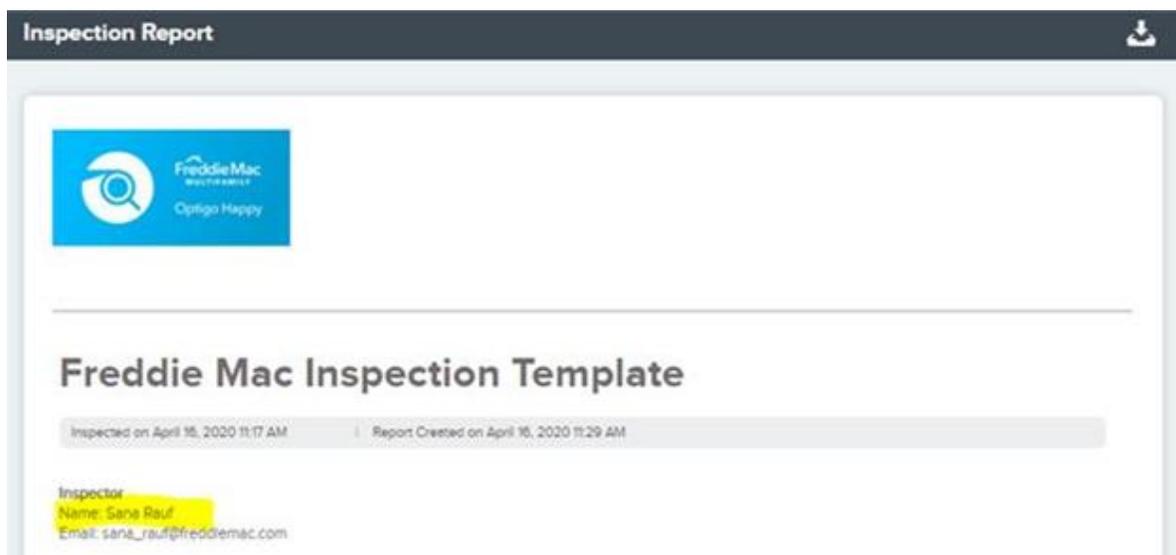
Yes, you can edit an existing inspection in the mobile app and at your desktop, as long as the report has not been submitted. Once a report is submitted, edits to the inspection will generate a new report.

For edits like adding extensive comments and details, we recommend using your desktop for ease of use.

Can more than one inspector work on a single inspection?

Yes, more than one person can work on an inspection. However, the inspector who completes and submits the inspection will be named on the report.

Please see the below example of a report naming the inspector.



Can I share inspections with other inspectors?

Yes, users can access multiple inspections and inspection data within their company's Optigo Happy account.

Do I need to upload reports into the Document Management System (DMS) manually?

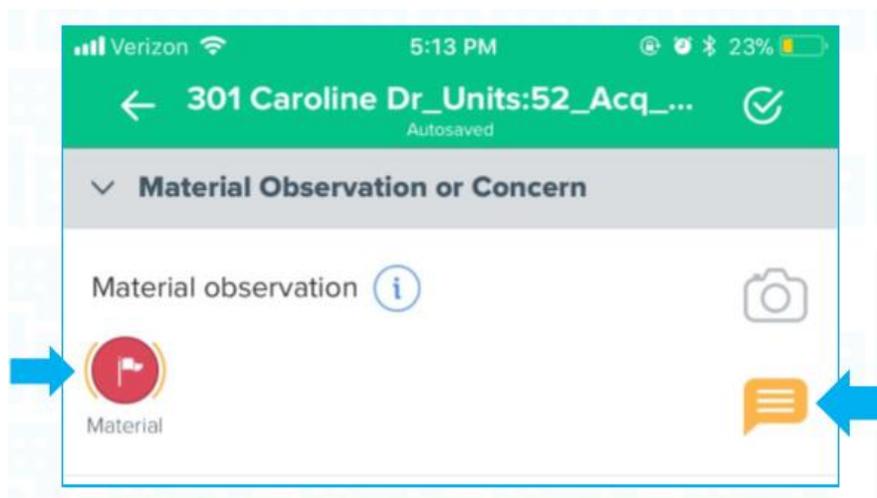
Conventional and Specialty reports submitted in the mobile app or from the desktop browser are automatically sent to DMS.

For lenders with SBL accounts, you do not need to upload to DMS as the team relies on the data submitted.

Do I need to provide comments in all sections?

No, the app will indicate when additional comments are required.

- () = drawn around conditionally required fields
- Yellow comment box = highlighted when an answer requires additional comments

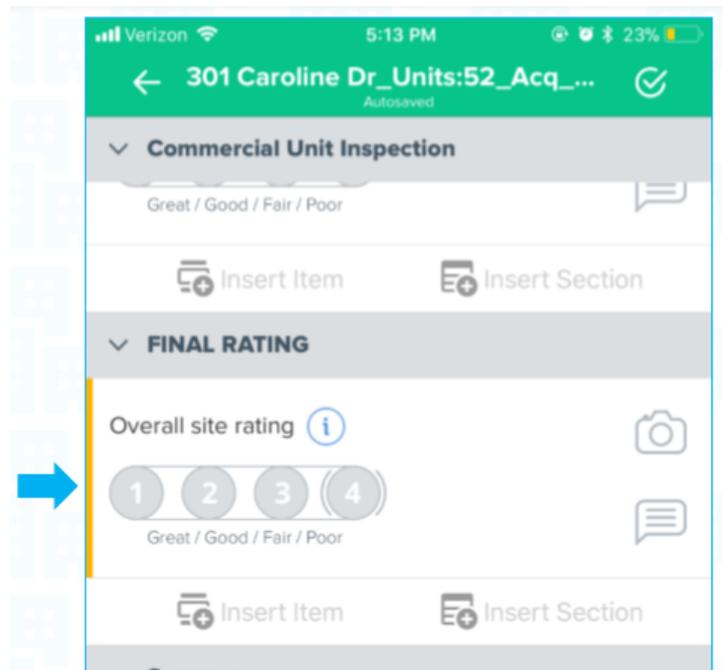


Do I need to complete all sections in the inspection template?

No, the app will only require fields or comments if applicable for the specific property. Some sections may not be applicable to the property and should be left blank.

Does the app highlight the 'always required' fields in the template?

A yellow line outlines the required questions within the template.



Can I move pictures between sections of the inspection template?

No, pictures cannot be rearranged. Pictures can be taken on your device and later uploaded into the app, but we recommend lenders take a photo using the camera icon in that section. A max of eight photos can be uploaded to each section.

Can I save individual pictures from my inspection report?

Yes, to save pictures from your property inspection report, click on the embedded photo you want to save when viewing the report on your computer's internet browser. Once the image has loaded, right click the image and select "Save picture as..." to save the picture to your computer.

