

How to Order a Virtual Inspection on Optigo Happy

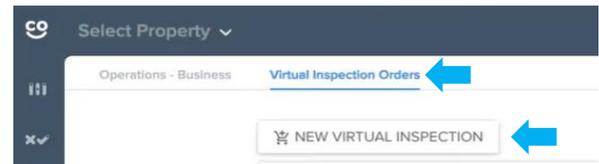


Step 1: Log into Optigo Happy manage (<https://manage.happyco.com/>)

Step 2: On your main Optigo Happy homepage/dashboard, click “Virtual Inspection Orders”. Then click on “NEW VIRTUAL INSPECTIONS”.

- You will be able to schedule a virtual inspection on this screen.

Step 3: Select your branch location in the Region/Office field and click “Next”.



Step 4: Fill out the inspection details on the inspection order page.

- Inspection:** select the property that will be inspected
- When is the Virtual Inspection scheduled?** Select the date and time for the scheduled inspection
- Timezone name:** select the timezone for the scheduled inspection date and time
- Lender Inspector:** select the name of the inspector from the Lender drop down list
- Camera Operator name:** type in the name of the camera operator
- Camera Operator email:** enter the selected camera operator’s email

Region/Office
Los Angeles

Inspection
a)

When is the Virtual Inspection scheduled?
b)

Timezone name
c) Eastern Time (US & Canada)

Lender Inspector
Lender Inspector
d)

Camera Operator
Camera Operator Name
e)

Camera Operator Email
f)

Step 5: Select the additional participants that will be joining the Optigo Happy virtual inspection virtually. Select the “Email All Participants Immediately?” checkbox under “Additional Options”. Click “ORDER INSPECTION”.

- Freddie Mac joining:** select the checkbox if a Freddie Mac inspector will be **virtually** joining the property inspection
 - SBL:** You will be prompted to select the Freddie Mac inspector on this screen.
 - Conventional & Specialty** (incl. TAH, Seniors, and Structured): You will enter the Freddie Mac inspector’s name on the next screen.

Other Participants

Engineer joining

Appraiser joining

Freddie Mac joining

Additional Options

Email All Participants Immediately?

ORDER INSPECTION

How to Order a Virtual Inspection on Optigo Happy



Step 6: Review the Virtual Inspection Order details and add additional participants to the ordered Optigo Happy inspection.

- **Freddie Mac Inspector:** Select a Freddie Mac inspector from the dropdown. Click the arrow next to the selected inspector to send the scheduled inspection email to the Freddie Mac inspector. Optigo lender can only assign one Freddie Mac inspector. Once this person is assigned, only Freddie Mac users can reassign.
- **Add Engineer, Appraiser or Other Participant:** Optigo lender can add additional participants (no template) up until the time of the inspection.

Step 7: Review the email history to ensure all invited participants have received a notification email.

- If an email has not yet been sent, click the arrow to the right of the email address to send a notification email with Property Address, Date, and Time of the now-scheduled virtual inspection.

Virtual Inspection Orders

Road_Acq_#504222953

Region	Los Angeles	Freddie Mac Inspector	Sloane Duhe (sloane_duhe@freddiemac.com) never emailed
Start On:	7/27/20 at 10:00 PDT	Lender Inspector	John Taylor never emailed
Session Code	168-961-157	Camera Operator	Sloane Duhe (sloane_duhe@freddiemac.com) last emailed less than a minute ago
Inspection Status	Scheduled		
Ordered By	John Taylor		

ADD APPRAISER ADD ENGINEER ADD OTHER PARTICIPANT

Email History

Role	Name	Email Address	Sent at
Lender Inspector	John Taylor	john.taylor@lender.com	7/24/20 at 10:16 MDT
Camera Operator	Sloane Duhe	sloane_duhe@freddiemac.com	7/24/20 at 10:16 MDT

Additional Help

- For information on how to join and complete a Happy Virtual inspection, please review our [“Getting Started Guides”](#)
- For questions or support regarding Optigo Happy Virtual Inspections, please contact the HappyCo support line: (628) 272-8050, or [raise a request through the Support Desk](#)