

Provision a User

in Optigo Happy Inspections App



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Use this guide to provision a user in Optigo Happy for Inspections by HappyCo, the property inspections mobile application.

Step 1: Visit the [Optigo Happy Service Desk](#)

Step 2: On the Service Desk homepage, click “Need to raise a request? Contact us.”

Help Center / Optigo Happy Service Desk

Optigo Happy Service Desk

Welcome to the Optigo Happy Service Desk!

Search for Optigo Happy specific support articles or raise a service request.
For issues that require immediate attention (Optigo Happy is down, you cannot connect to a virtual inspection, etc.) please call (628) 272-8050.

Learn more about

[Getting Started Guides](#)

Need to raise a request? Contact us. >

Step 3: Select the “General” issue option.

Contact us about

General >
Add a new user, Suggest a new feature / improvement, Technical support, Report a bug, Template Changes, API Issues

Virtual Inspections >
Scheduling a Virtual Inspection, Virtual Inspection Support



Step 4: Click the “Add a new user” option and fill in the required fields.

- a) **Summary:** Type in “Add User(s) to (Lender Name)”, or “Add User(s) to Freddie Mac.”
- b) **Description:** Type in the name, email address, and business line (SBL, Conventional, TAH, Structured, Seniors, MHC) you want to add the user or users to.
- c) **Email confirmation to:** Type in your email.

Summary *

Description *

Please list all users that need to be added and their roles

Email confirmation to *

Step 5: Click “Send” at the bottom. Once the ticket is approved and the user’s account is activated, you will receive a confirmation email. Tickets will usually take a day to be approved.

Additional Help

- For information on how to join and complete an Optigo 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](#).