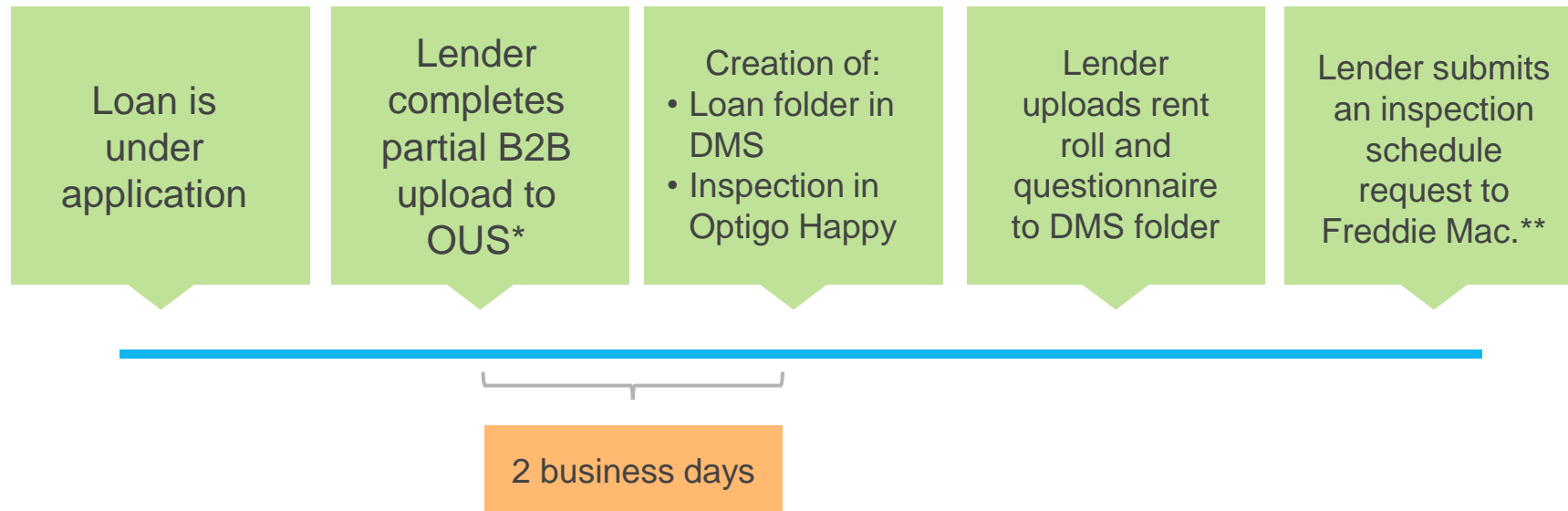




Partial B2B Submission and Inspection Scheduling

By following the steps below and acknowledging the required lead time, lenders will greatly increase Freddie Mac's ability to confirm the requested inspection date and time. Following these steps will help facilitate the lender's completion of their underwriting process.



*For questions about B2B uploads, contact the [Multifamily Service Desk](#).

**After confirmation with the Freddie Mac underwriter, a virtual inspection can then be ordered, if needed. For questions about inspections, visit the [Optigo Happy Service Desk](#).

Partial B2B Submission and Inspection Scheduling



Process Flow

1. Once a loan is under application, the Optigo® lender must submit a partial B2B upload shortly thereafter to create a loan number, which will trigger certain downstream system events that are necessary for the Optigo lender to complete their underwriting process.
2. Upon successful upload of the partial B2B, allow at least two business days for the loan information to populate and trigger the creation of (1) a folder in DMS for the loan and (2) the inspection form in Optigo Happy.
3. Upload the rent roll and borrower questionnaire to the DMS folder.
4. Submit an inspection schedule request to Freddie Mac and, if required, an Optigo Happy virtual order form.

A full and complete B2B upload is required at loan submission upon the lender's completion of their underwriting. The initial loan number is used throughout the process. The information uploaded in the complete B2B upload will replace any outdated or draft information that was included in any preceding, partial B2B upload.