ViewSpection Agent Guide

ViewSpection

Table of Contents

Introduction

You've got the smart phone, now put it to work with ViewSpection! ViewSpection transforms the submission process. With ViewSpection you use the ViewSpection Agent App to quickly complete an exterior or interior field visit according to best practices.

At the policyholder's location, the app guides you through gathering all the photos the underwriter will need to make a quick decision on the submission.

ViewSpection is very flexible and allows you to add outbuildings, complete an interior inspection if desired and compiles it all into a professional looking report. Once you click upload, a fully formatted and labeled PDF is emailed to you!
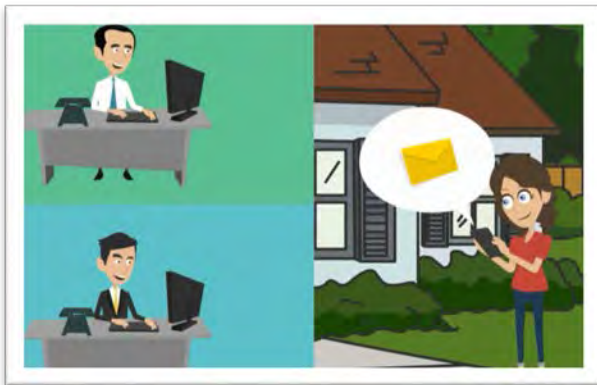
Don't have time to get over to the property?

An invite may be sent to the policy holder via both the app and/or the web platform.

Your policyholder will receive an e-mail and text invitation. Once they download the app, it only takes 15 minutes to complete the ViewSpection photo survey.
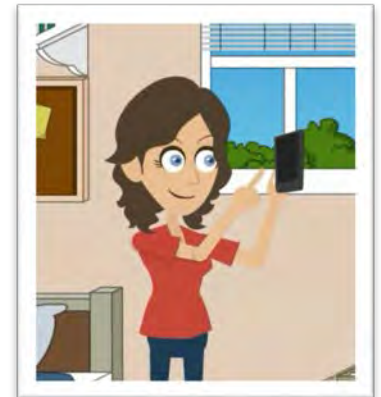
Your policyholder will really appreciate how easy it is to use ViewSpection! Today's consumers have higher expectations about customer service and technology, and with ViewSpection, you are on the cutting edge.

With the policyholder's help, you can provide more information to your carrier at submission and secure the best policy for your customers.

ViewSpection assists you in your communication and collaboration with the underwriter.

The web platform is built to streamline the submission process and help you write more business.

Installing ViewSpection

ViewSpection is both a website and an app. As an agent, you will use both. Your policyholders will only use the app.

Signing up

You can sign up right from the app. First download the app from the App Store or Google Play.

Once a ViewSpection is uploaded, you will receive the PDF report in your email. You can also view the report online on the ViewSpection Web Platform

App

ViewSpection has apps for the agent and for the policyholder. Both apps are free to download.

ViewSpection Agent is the app we have developed just for you and it is available in the App Store for iPhone as well as the Google Play for Android.

Your log in information will allow access to both the app and the ViewSpection Web Platform.

ViewSpection is the app developed for the policyholder and it is also available in the App Store for iPhone and Google Play for Android.

The policyholder will receive an invitation code with your invitation e-mail and text which they will use to access the app once they download it.
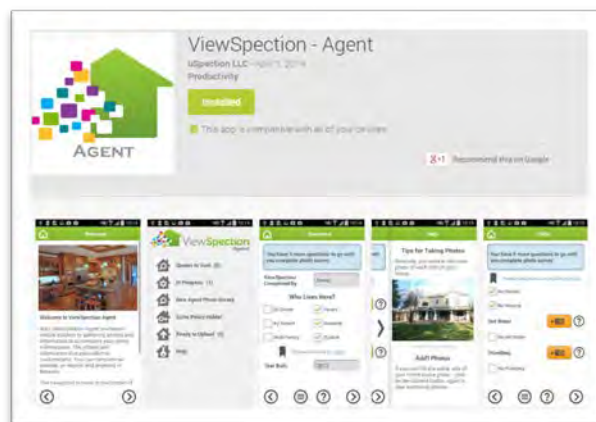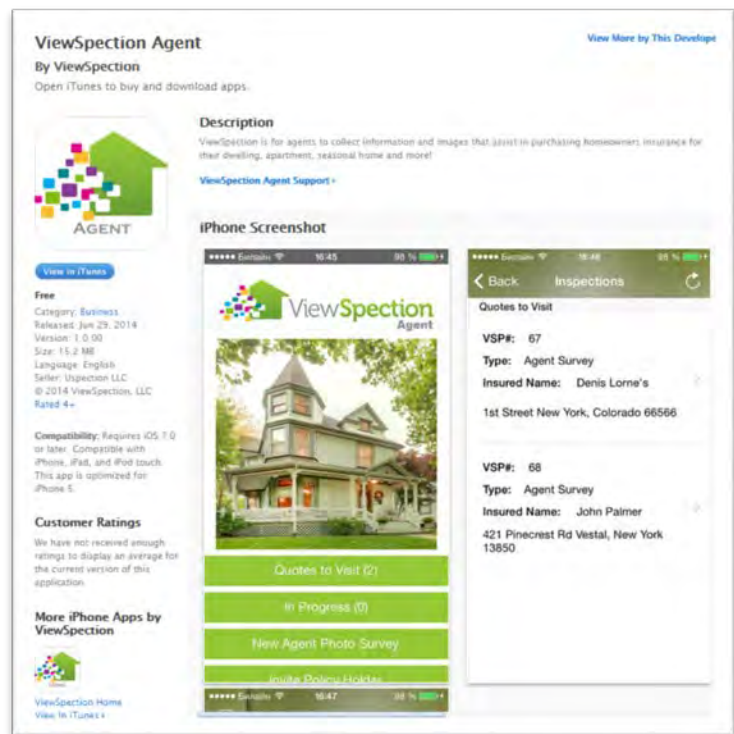
Signing In On The App
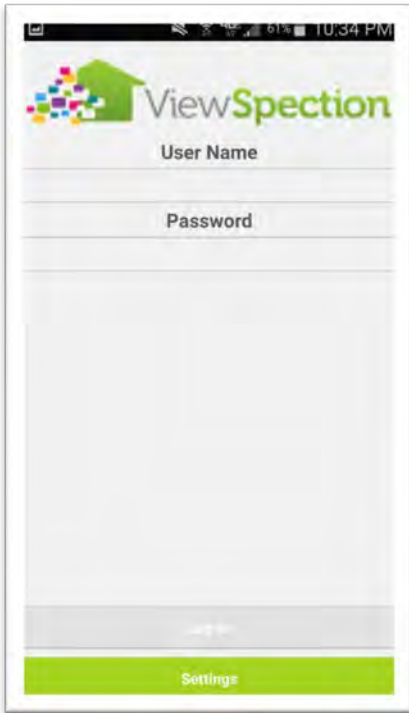
As an agent, this is the log in screen you will see the first time you open ViewSpection Agent. You will remain logged in after your initial log in.

Your policyholders will see this log in screen and they will enter the invitation code which they received in your invitation e-mail and text.

Working with the App

Quick Guide for Agent Photo Survey

- **Sign In**
- **Start New Agent Photo Survey**
- **Enter risk information**
- **Answer property questions**
- **Take dwelling photos from all sides**
- **Add outbuildings if needed and take photos**
- **Complete outside photos**
- **Complete pool & spa questions and take photos if needed**
- **Add any interior sections as needed**
- **Upload report when all sections are completed**

Getting Around the App

Navigation is easy. To begin, just tap a section:

New – For a new survey to be completed by you.
Invite – To invite a policyholder to complete a survey.
Dashboard – An overview of your surveys.
Help – Helpful tips to get you started.
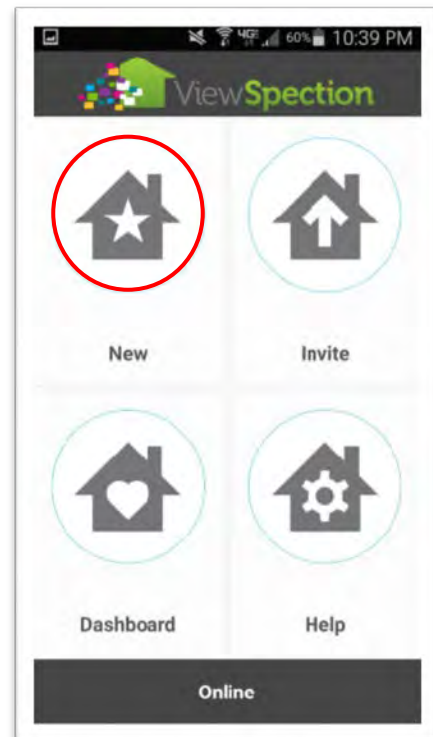
During the survey, just tap ← to go back to the previous screen.

Tap Next to go to the next screen.
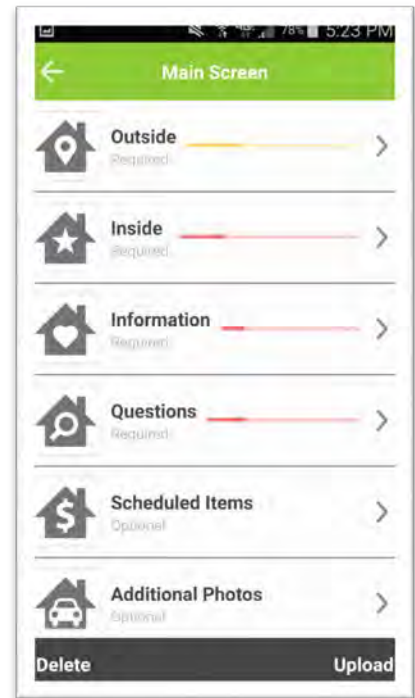
Completing a ViewSpection Photo Survey
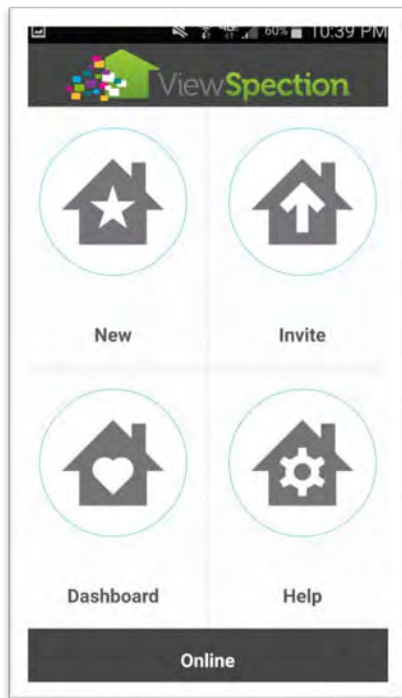
Start Screen

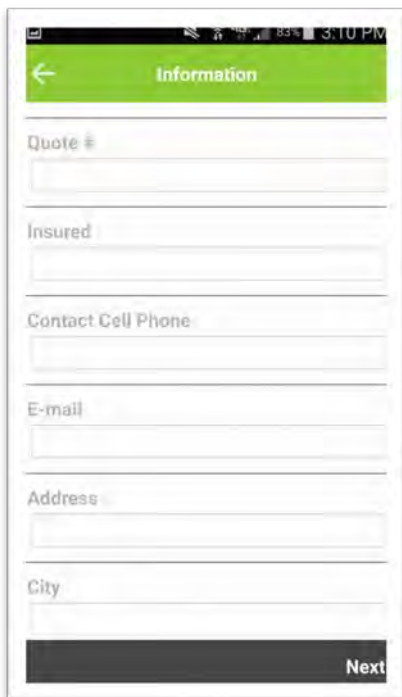Begin a new survey or invite your policyholder to complete a survey.
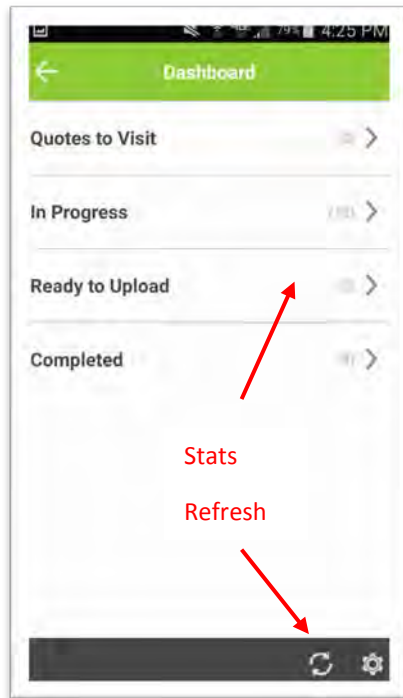
Dashboard

Gives you an overview of your ViewSpection Surveys.
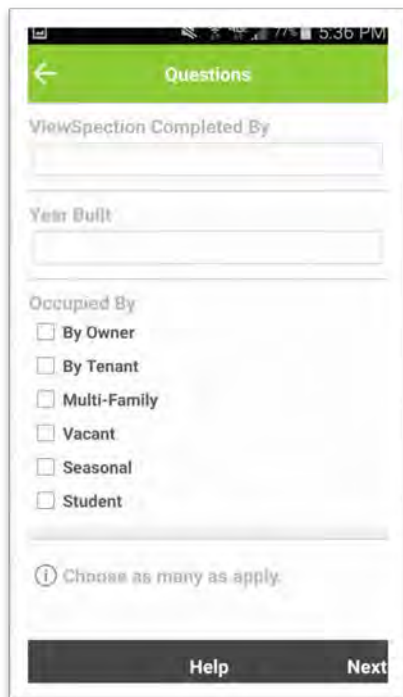

Main Screen

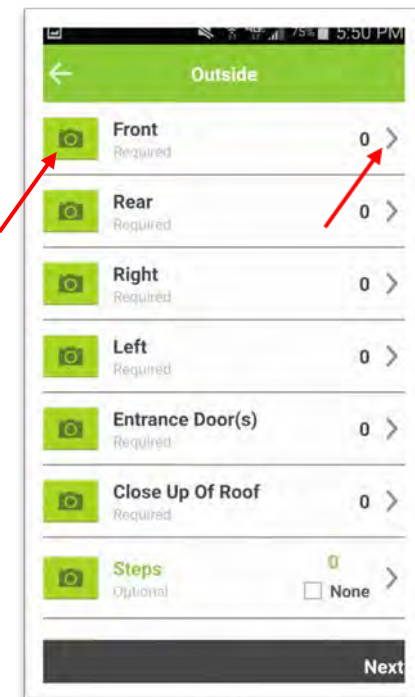Start the photo survey by tapping on any section.

Information Screen

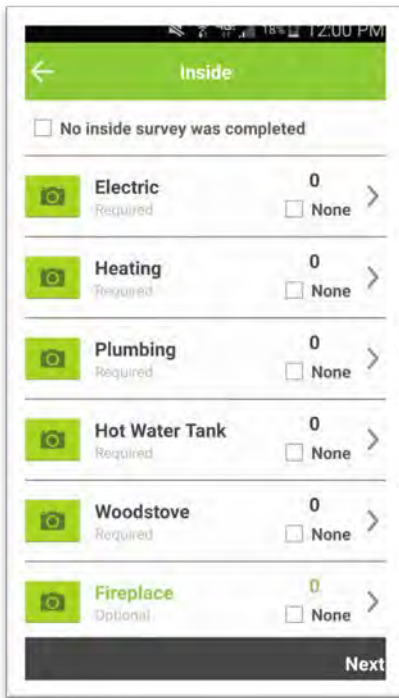Entry screen for starting a new ViewSpection photo survey.

Questions

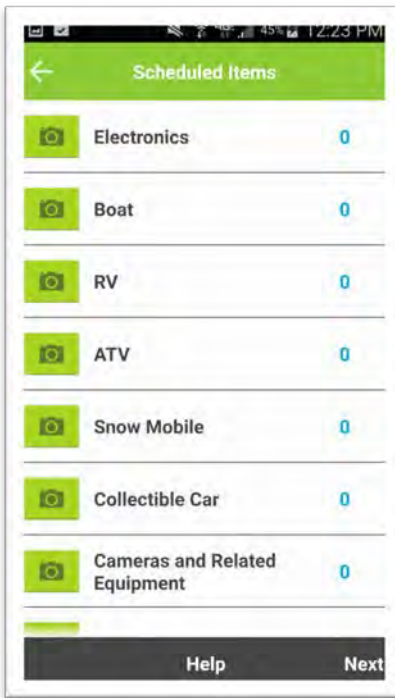Basic ViewSpection Questions regarding who is completing the survey and property info.

Outside

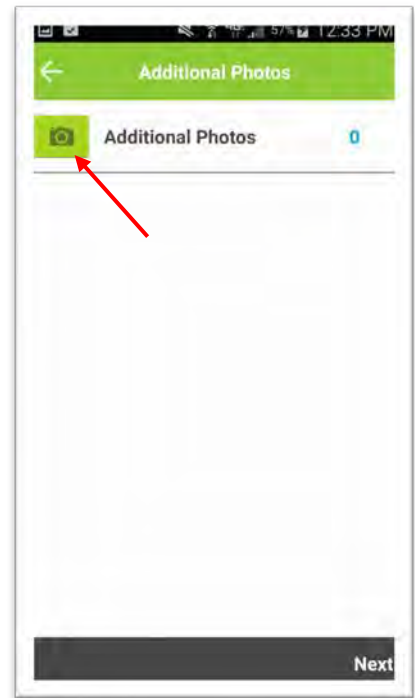Tap on 📷 to take a photo or ❯ for more information and help.

Inside
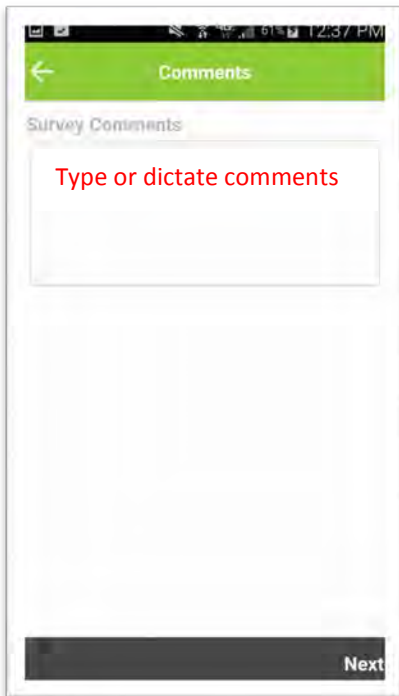Tap on [camera icon] to take a photo or [>] for more information and help.

Scheduled Items
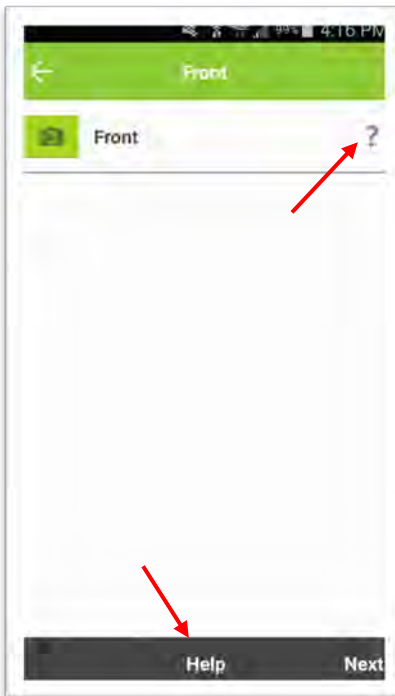This screen allows you to take photos of any Scheduled Items.

Additional Photos
You can add any additional photos you feel are relevant.

Comments
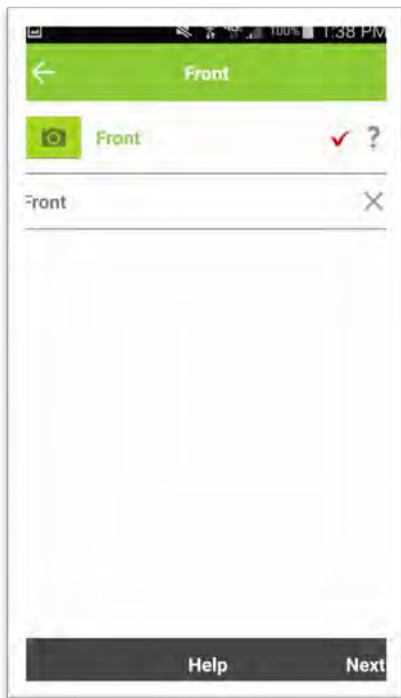This screen allows you to make any comments about the risk or the insured.

Help
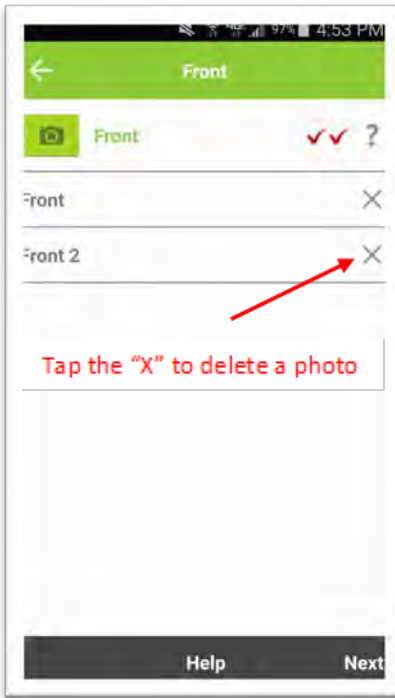For help, tap on "?" on the upper right, or "Help" at the bottom of the screen.

Help Screen
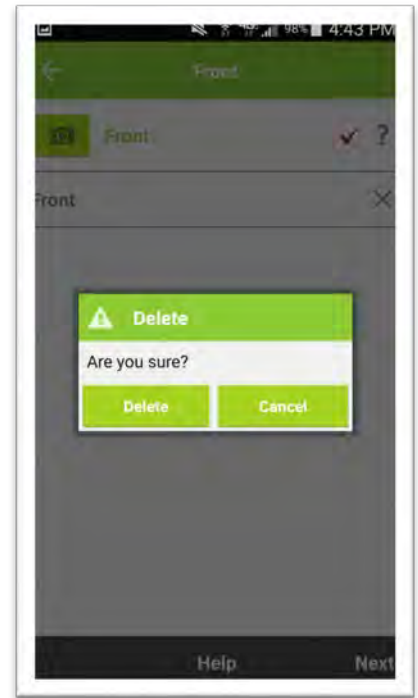The Help Screen gives you tips on how to take the proper photos and instructions on how to proceed.

Multiple Photos

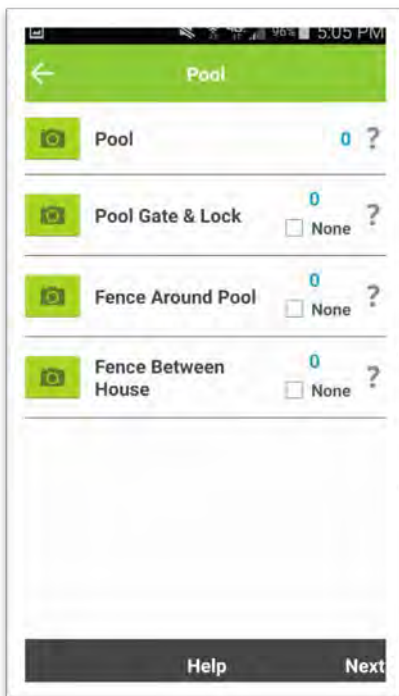Once you take a photo you will see a ✔ to the right. To take another photo, just tap 📷 again.

Delete A Photo

Tap the "X" to delete a photo. You can add and delete as many photos as you wish.
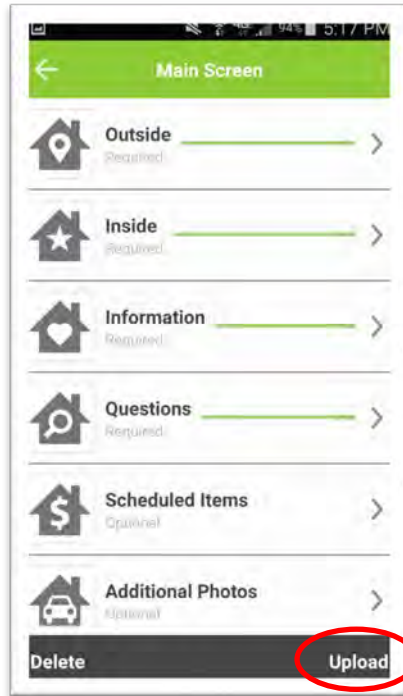

Confirm Delete

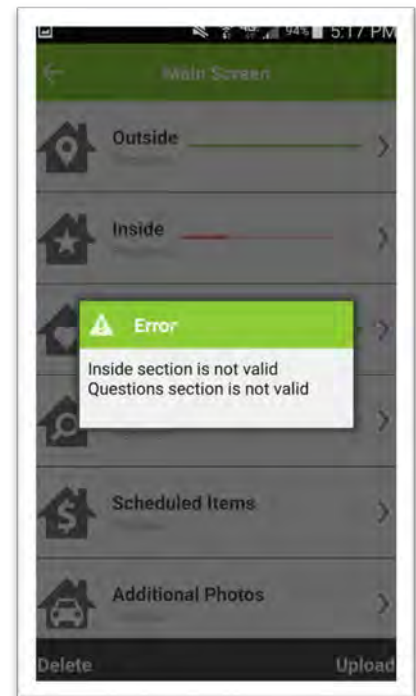When you tap the "X" to delete a photo you will be prompted to confirm.

Additional Options

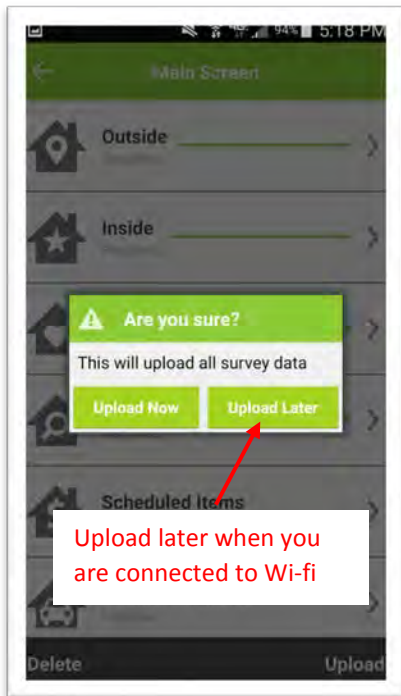Some screens will have additional photo selections. Like a pool gate and fence for Pools.

Survey Status

The status bars will turn green when you have completed the survey and you can tap "Upload" when finished.

Upload Error

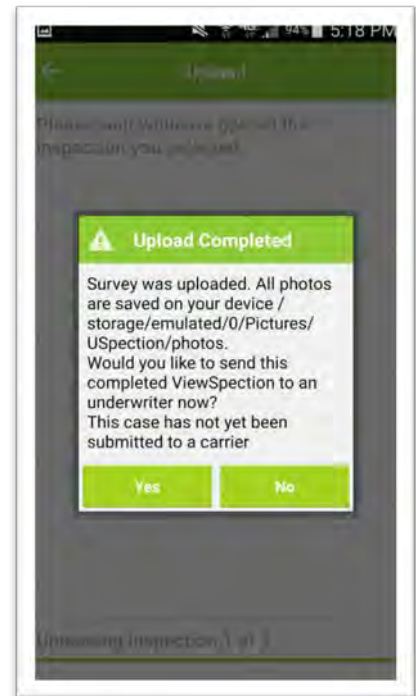If you tap Upload before the required sections are completed, you will get an error message.

Upload

When select Upload and all required sections are completed, you will get a confirmation message.
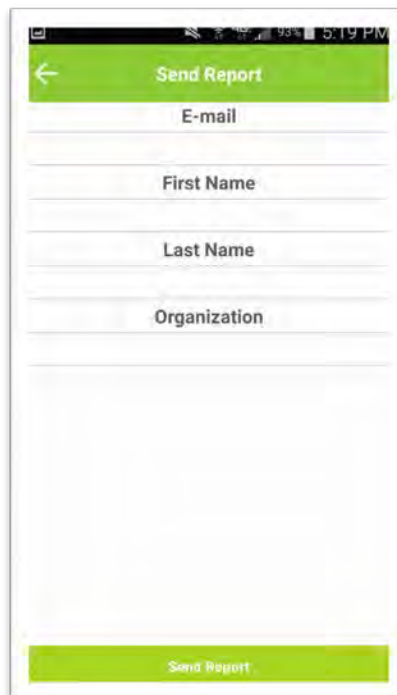
Upload later when you are connected to Wi-fi

Uploading Inspection

When you Upload, you will see an uploading inspection status bar at the bottom of the screen.
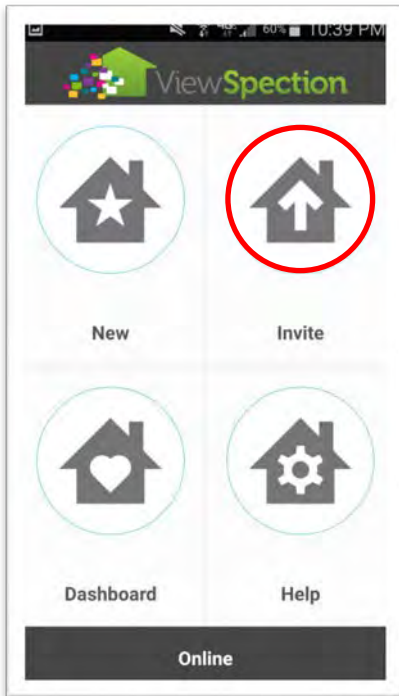

Upload Completed

When the upload is completed, you will have an option to email the report to an underwriter.

Send Report

To send a report to an underwriter, simply fill out the information and tap Send Report.
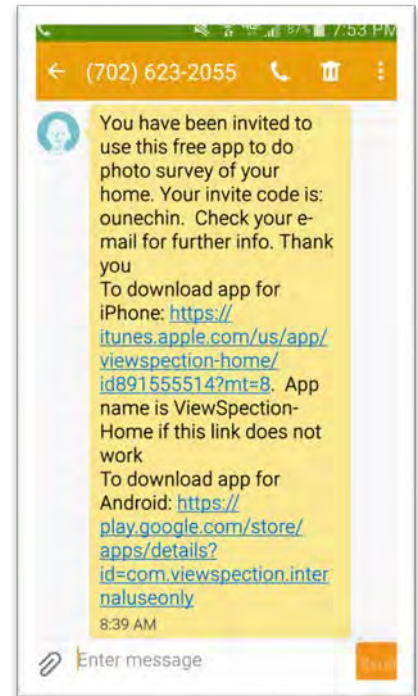
The Policyholder's Experience

Invite
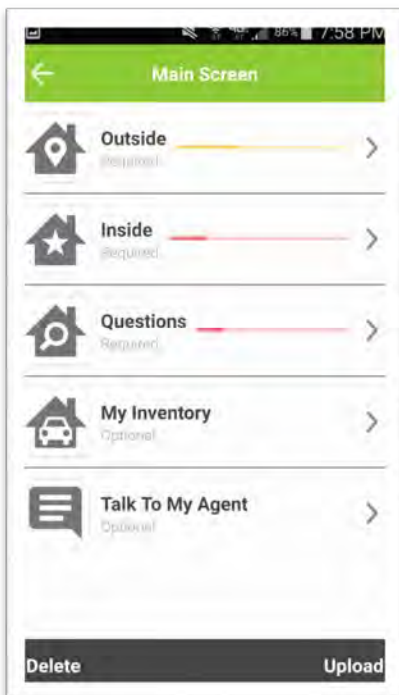Tap the invite button on the Start Screen.

Invite The Policyholder
Fill out the information on the form and tap Send.

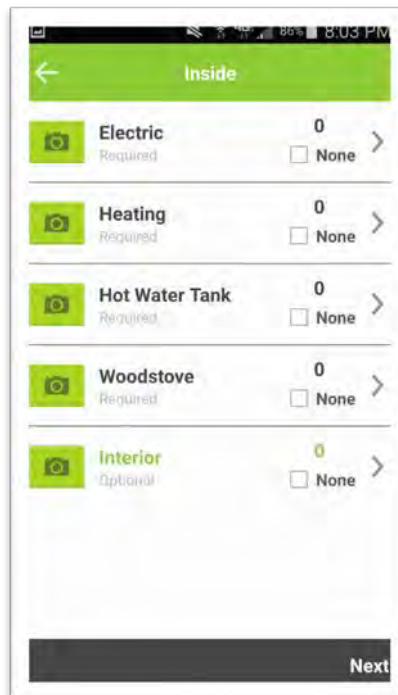**Text Message**
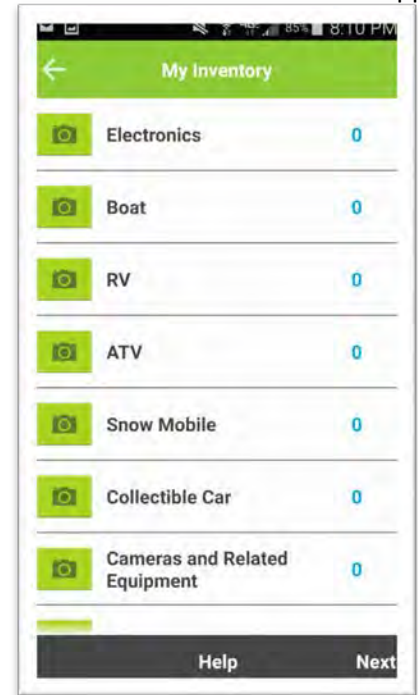The policyholder will receive a text invitation as well as an email invitation with directions to the app

Start Screen
The policyholder has a similar start screen and will be guided every step of the way.

Inside Screen
The app works the same as the agent version, with the same icons and helps screens.

My Inventory
This section is a great way for you to collect information on scheduled items from your policyholder.

Talk To My Agent

The section gives the policyholder an opportunity to talk to you and give you details about their property.

Questions

The policyholder will answer who completed the survey, year built and occupancy info.

Ready to Upload

When the survey is complete, the policyholder will tap Upload.

Upload Error Message

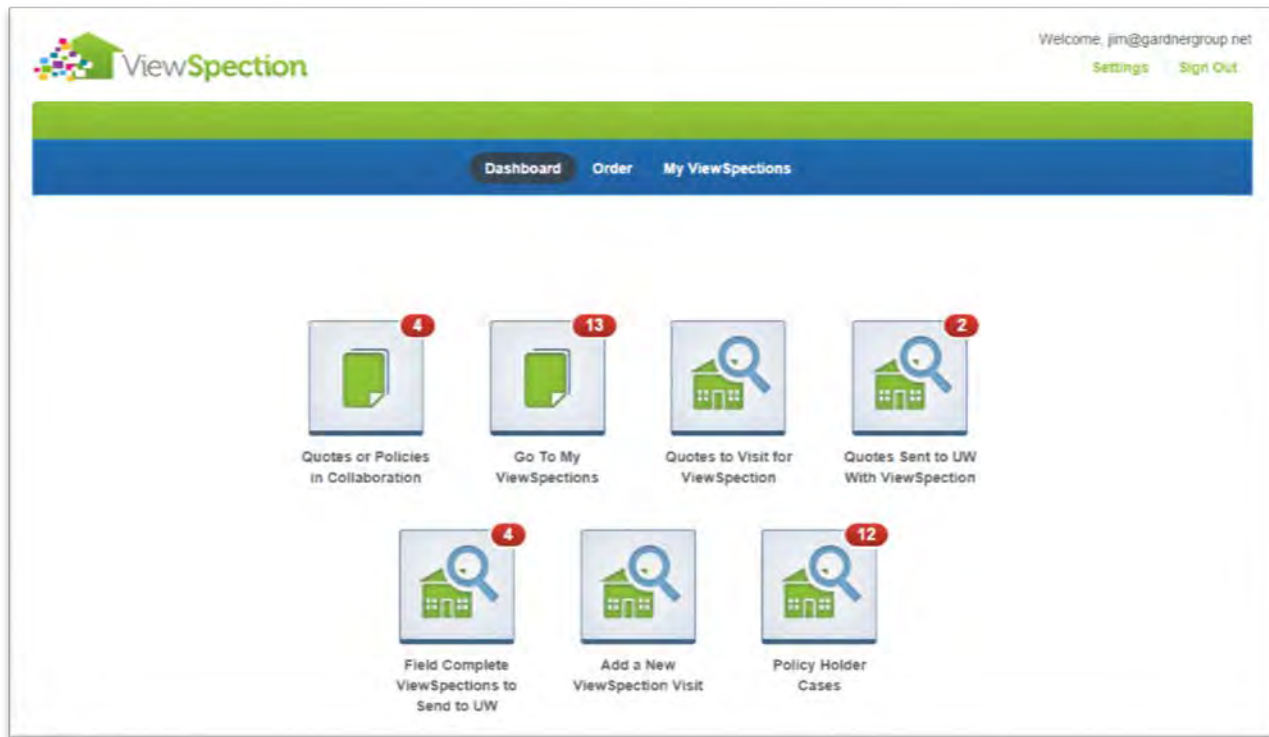If any information is missing, the policyholder will be given the details before they can upload the survey.

Upload Confirmation

The policyholder will be able to choose to upload now, or when they are connected to Wi-fi.

Uploading Inspection

The survey is uploaded and you will receive a notification that it has been completed.

Using the Web Platform
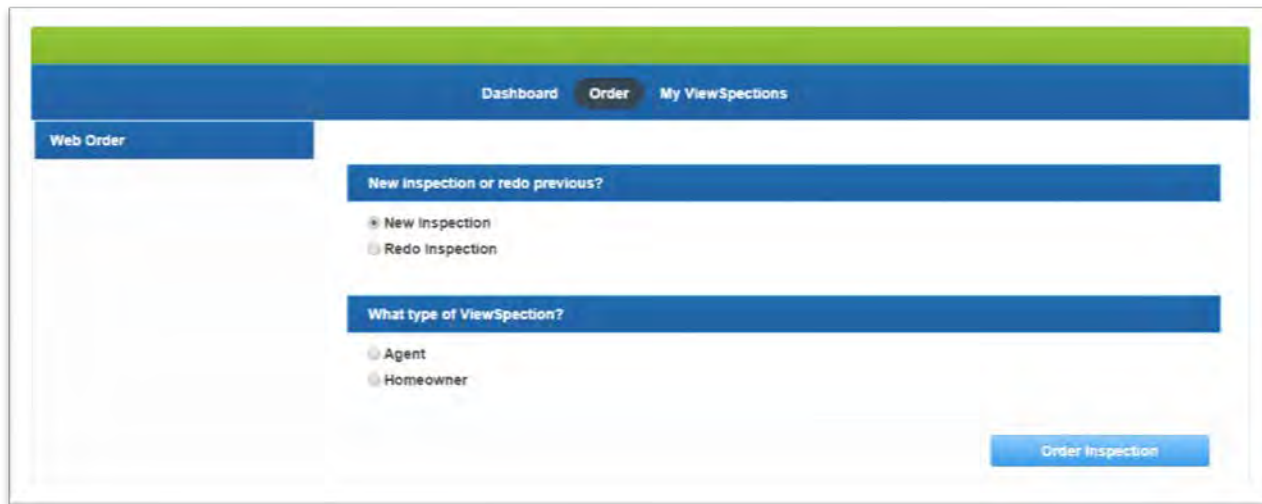
The dashboard is set up with multiple search options to allow you to quickly access information

- **Quotes or Policies in Collaboration**- These are ViewSpections in which you have active collaboration between yourself and UW

- **Go to My ViewSpections**- This accesses all of your ViewSpection cases, both yours and policy holders you have invited.

- **Quotes to Visit**- These are cases which you have entered as an Agent ViewSpection and you have not visited yet. Think of it as your field visit "To Do List".

- **Quotes Sent to UW**- This accesses cases which you have completed and sent to an underwriter

- **Field Complete ViewSpections to send to UW**- This is another to do list- you have completed the Viewspection field visit and still need to send this to the Carriers UW. You may want to add comments or information before sending

- **Add a New ViewSpection Visit**- This button allows you to order a Viewspection- to be completed by either you or the policyholder

- **Policy Holder Cases**- These are cases which are being completed by a policy holder

Ordering ViewSpections from the Website:

Click on the Order button:
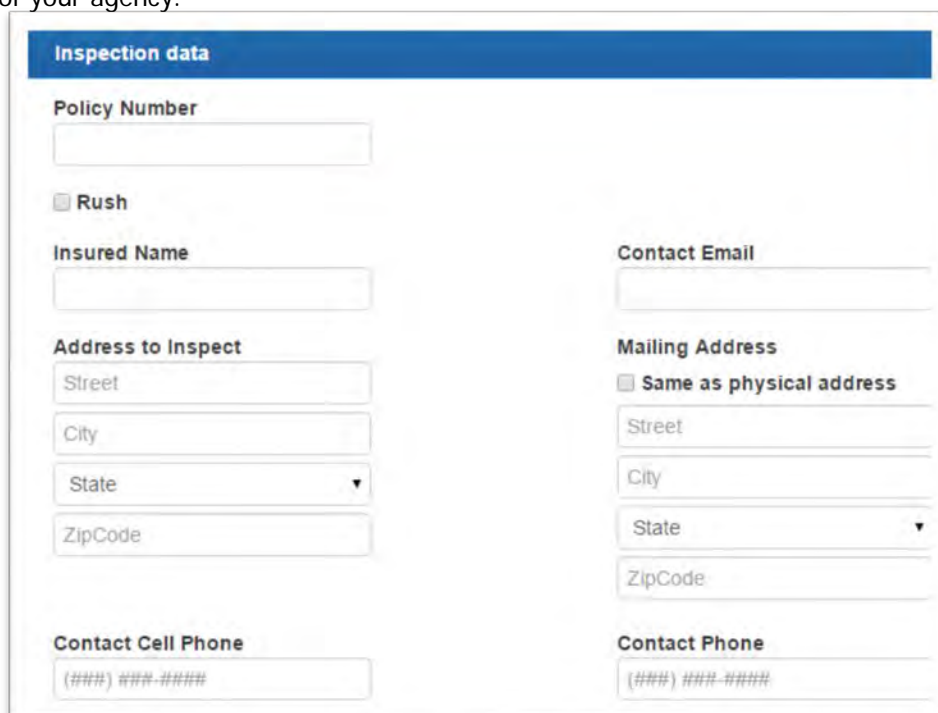
You may order ViewSpections in both the app and the web platform. In the web platform you may order a new inspection or re-order/transition an inspection.

New inspections: You are entering a ViewSpection request that is new; it has not been entered in the system before.

Redo Inspection: You may have an exterior inspection completed and you now want the policy holder to complete an interior ViewSpection. Redo allows you to transition from one user to another. For example, you may have completed an inspection on the exterior of a policyholder's home and are reordering an interior ViewSpection to be completed by the homeowner.

This is a sample of the fields that would need to be completed to order a ViewSpection. Additional fields can be added based on the needs of your agency.

Invitations to the Policy Holder
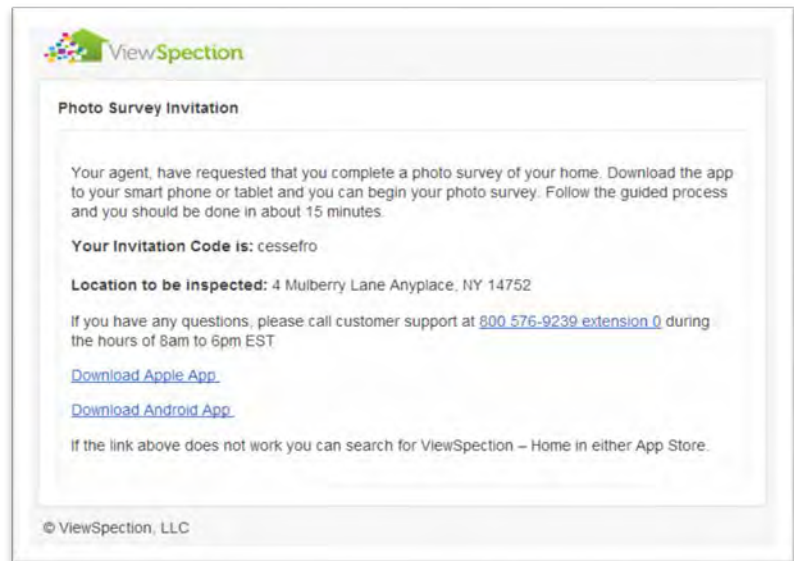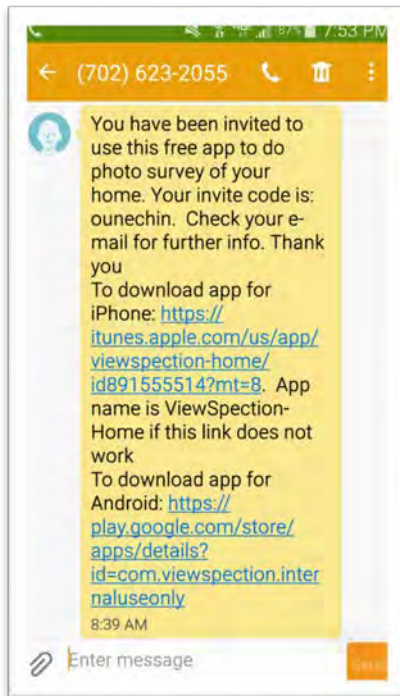
Each new order will generate both an e-mail as well as a SMS text invitation.

The policyholder will then download the app on their phone and log in with the provided Invitation Code.
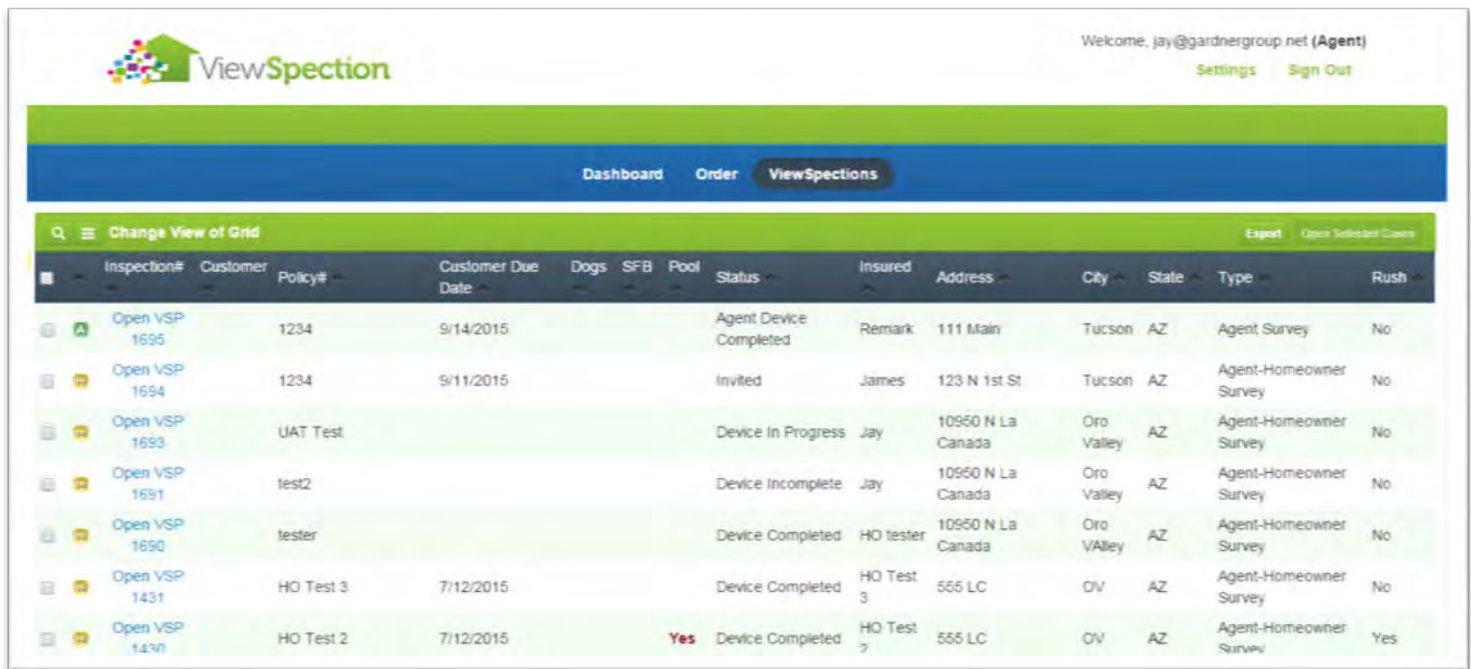
Encourage the policy holder to complete the ViewSpection as soon as possible. It should only take 15 minutes to complete.

My ViewSpections
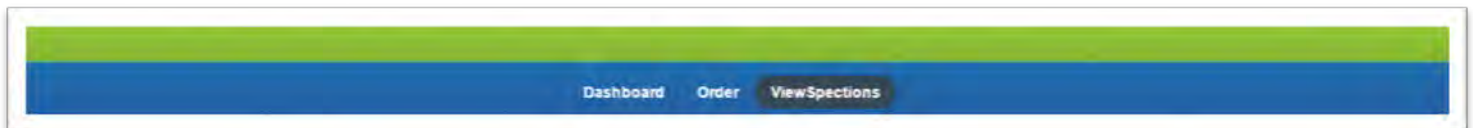
ViewSpections allows you to access the "grid". The grid is the listing of all your ViewSpections.

Getting Around-The Grid

The Grid provides a "high altitude" view of all open cases.

Change View of Grid
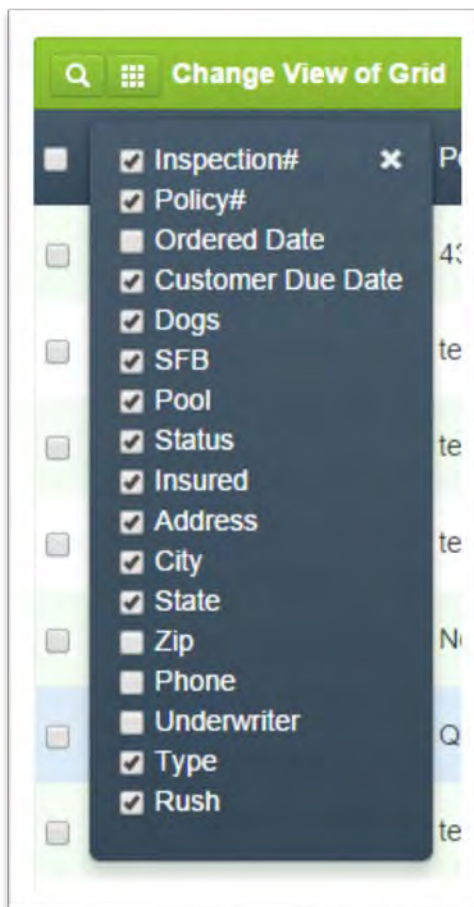
The columns which appear on the grid can be changed by choosing to display them or hide them. Select "Change View of Grid" in the upper left corner and put a check mark in each box you would like displayed.
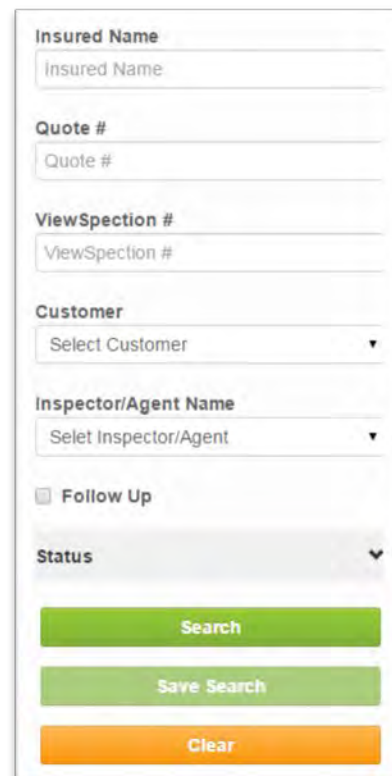
Searching Cases

You may search for any cases by clicking the search icon in the upper left corner of the grid screen. You may search by:

- Insured Name
- Policy/Quote #
- ViewSpection #
- Follow Up Cases

  These are cases which you have marked for follow up.
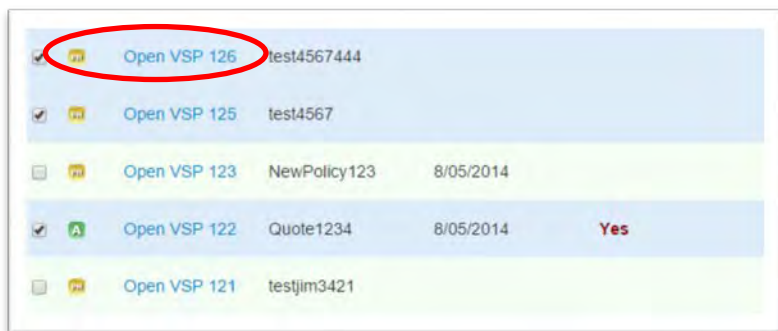
- Status Level

  You may search for cases at any status level such as Homeowner cases, or Agent cases.

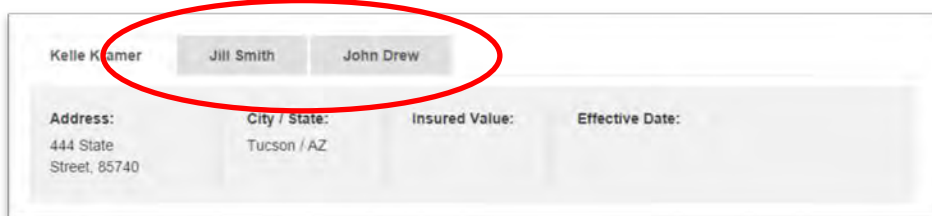## Selecting Cases & Opening Cases

Opening a Single Case

You may open one case by clicking on the "Open VSP ###" in blue

Opening Multiple Cases

Check each case that you desire to open then Click the "Open Selected Cases" in the upper right corner of the grid.

Each case will be displayed in a tab and you can move back and forth between cases by clicking the tab.

Main Columns on the Grid

Inspection #- This is the internal ViewSpection system number

Customer – This is the carrier if you have assigned one to the case

Policy #-This is quote or policy number that you assign at submission
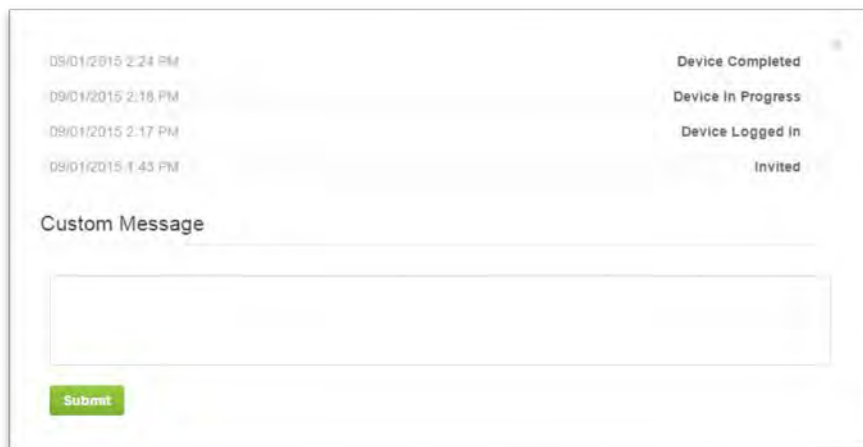
Status – This is the current status of the case

Insured – The insured's name

Address/City – The insured's address and city

Inspector/Agent – This is the person who completed the ViewSpection
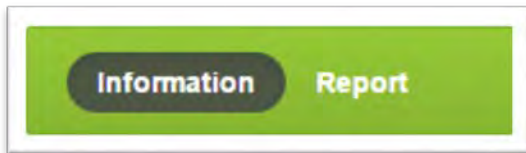
Status Messages

Status messages may be viewed by "rolling" your cursor over the status line for that case while in the grid view. The full status report will display for that case without the need to open the case.
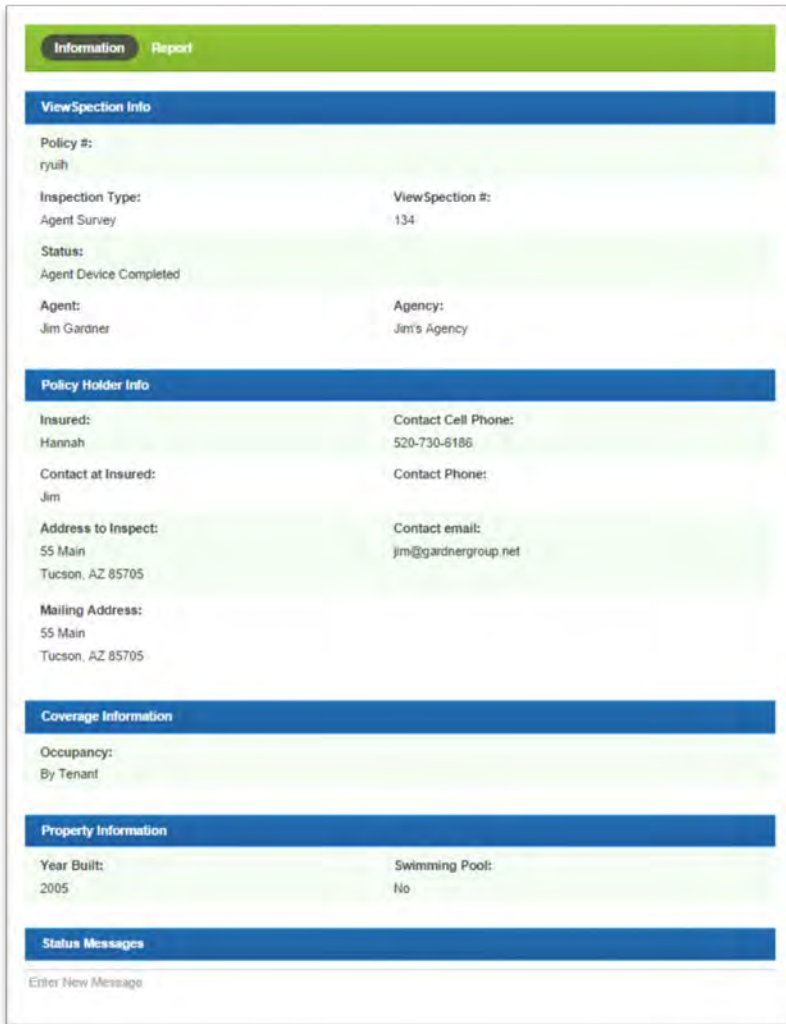
Watch these short videos for more: The Grid   Sorting

Working with a ViewSpection

When you open a case, it defaults to the Information tab.

Information Tab Sections

- ViewSpection Info
- Policy Holder Info
- Coverage Information
- Property Information
- Status Messages
- Message History

Each section in the Information Tab is organized to allow for easy access to information and to view what actions have been taken on a case to this point.

Case Action Center

In the upper left corner, there are buttons which allow you to take specific actions on the inspection.

Transition Inspection

When you transition a case, you are either changing the type of ViewSpection (exterior to an interior) to be completed, and/or you are changing who is completing the ViewSpection (agent or policyholder).

A REDO is a case that has been completed by someone (agent or policyholder) usually as an exterior and now someone else is going to complete another inspection of the same location as an interior.
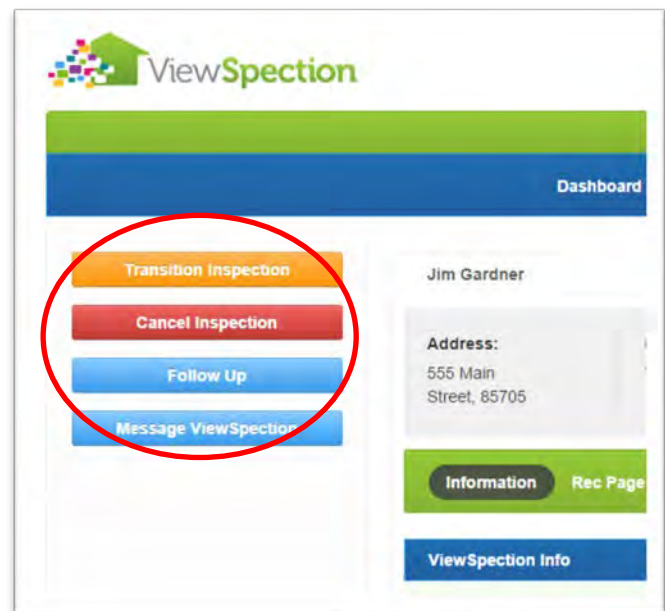
If you are going to choose Redo Inspection and select Homeowner, you must first make sure that the Policyholder's email address and phone number have been entered on the Information Screen, otherwise the Policyholder will not receive the Invitation Code or download link. Just click Edit Edit *to add that information to the Policyholder Information section of the Information screen on the web platform.*

Cancel Inspection

Canceling an inspection removes the case from active status and ceases tracking of the case.

Follow Up

Use Follow Up to track a case you want to take further action on, or a case you want to check on at a later date. In the search screen, you will be able to select "Follow Up" cases and easily view them.

Message ViewSpection

This allows you to submit questions directly to ViewSpection staff regarding questions you have in using the system

Report

Select the Report tab to view the report in an editable format.

Navigating Panes

The panes on the left side of the report allow you to navigate to the major sections of the report. The red badges on the pane indicates that a defect has been identified in that section by an agent or underwriter user.

Normal navigation is available by scrolling up and down through the report.

Editing Sections

By selecting the "edit" button in a section you can access the editing tools for that section. There are various levels of edit capabilities depending on the section.

There is a comments box for extended comments.

You may also edit the photo labels to a custom label which better describes the image.
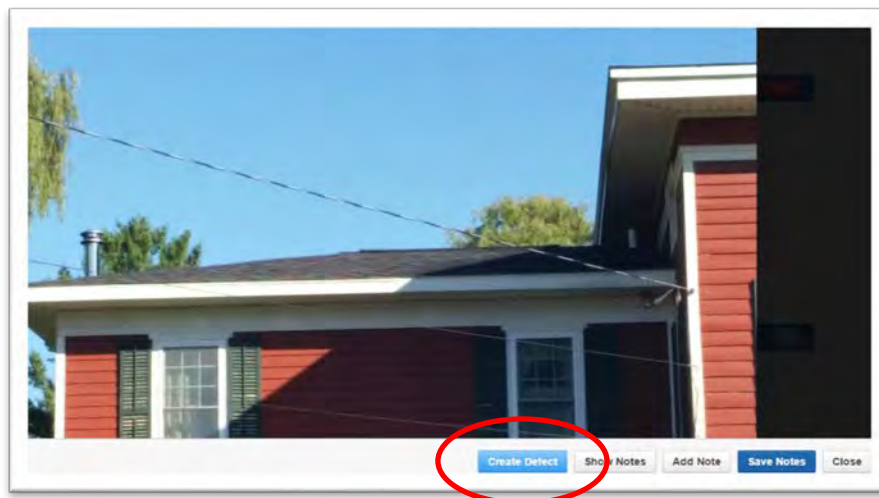
Working with Images

Enlarging image

All images may be enlarged by clicking on the image for a view of the full size image

Create Defect

When viewing a full size image, click on "Create Defect" when you have identified and defect and want to generate a recommendation regarding the defect.

After selecting "Create Defect", the "Select Section" is viewable. Select a section which relates to the defect you have identified.
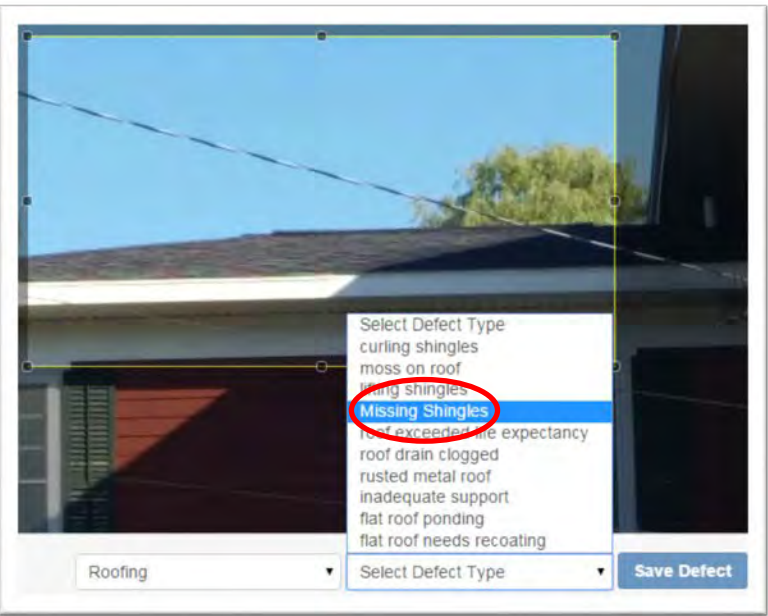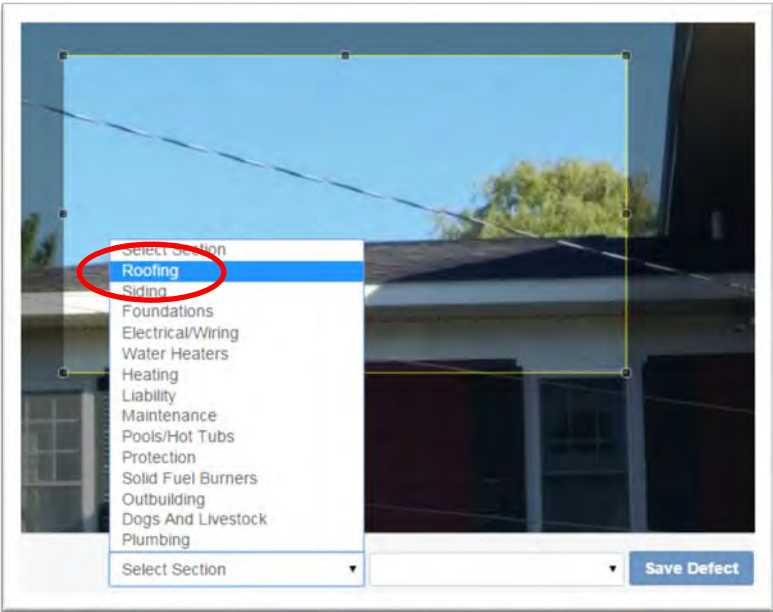
With the Section selected you can then select the specific defect from the pull down list. When complete with the selection choose "Save Defect".

Click "X" in the upper right corner of the image to exit the image and return to the report.

The recommendation will now be viewable in the report and in the Recommendation section:

Completing Report

To send a report on to the carrier or carriers, all you need to do is select "Complete Report" and then "Send Report to Selected Carriers".

Choose the recipients from existing users you have sent a ViewSpection to before or add a new user.

Select "Create" and the report will be sent to the recipients you have selected.

Each recipient will receive an e-mail alerting them that a ViewSpection has been delivered.

Watch this short video for more: The Report

Agent Support

If you have any questions or need support, please feel free to contact;

Jay Kramer

Chief Operations Officer

Jay@viewspection.com

520-975-1851