



# ViewSpection Agent Guide



ViewSpection

Version 4.1

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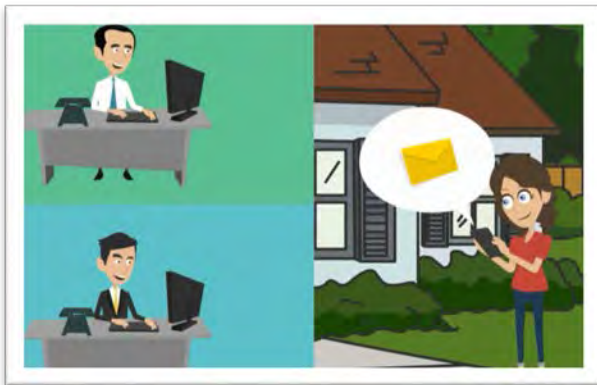


## Introduction

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.

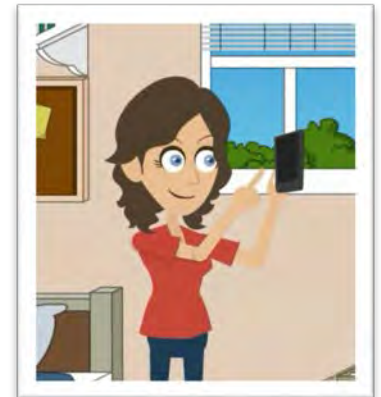
Your policyholder will really appreciate how easy it is to use ViewSpection! Today's consumers have higher expectations about customer service and technology, and with ViewSpection, you are on the cutting edge.



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

The screenshot shows the ViewSpection website interface. At the top, there's a navigation bar with 'Dashboard', 'Order', and 'My ViewSpections'. Below this, there are two main sections: 'Sign In' and 'Agent Sign Up'. The 'Sign In' section has fields for 'Username or Email' and 'Password', with a 'Remember me?' checkbox and a 'Login' button. The 'Agent Sign Up' section has fields for 'First Name', 'Last Name', 'Username', 'Email address', 'Agency Name', 'Password', and 'Confirm password', with a 'Sign Up!' button. There are also links for 'Forgot password?' and 'ViewSpection Agent Support'.

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

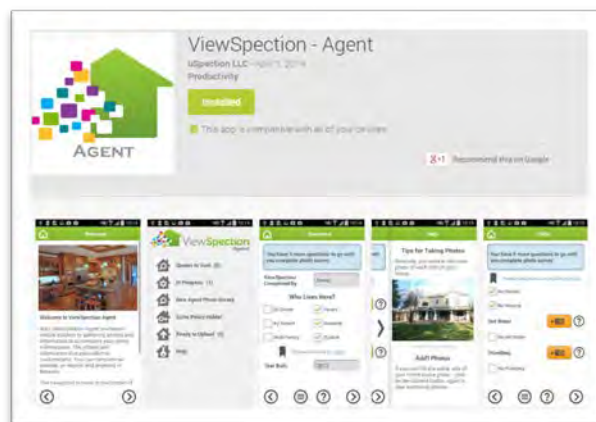
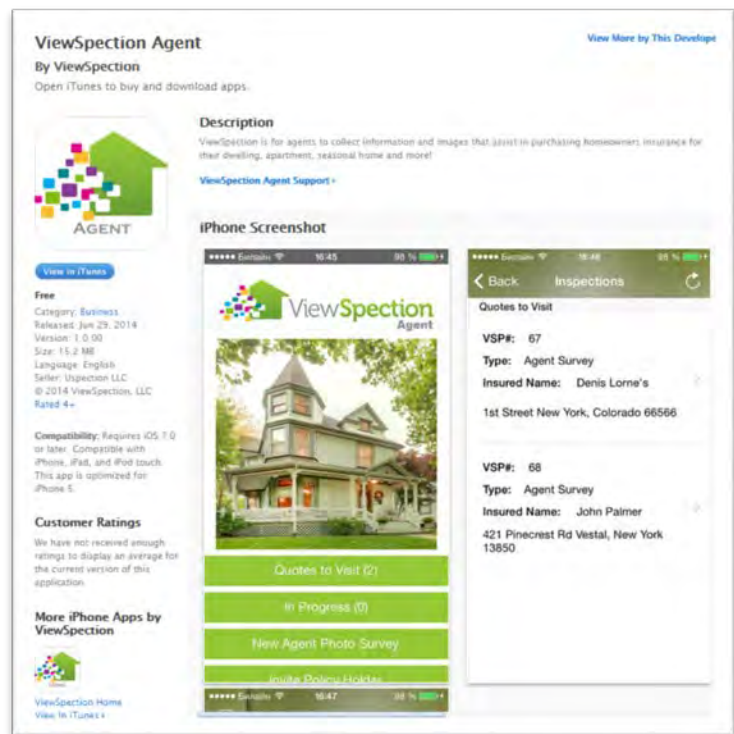
ViewSpection has apps for the agent and for the policyholder. Both apps are free to download.

**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.

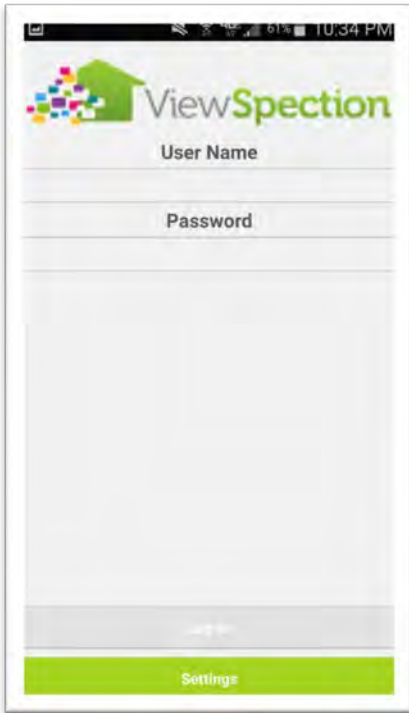
Your log in information will allow access to both the app and the [ViewSpection Web Platform](#).

**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



Upload

### Getting Around the App

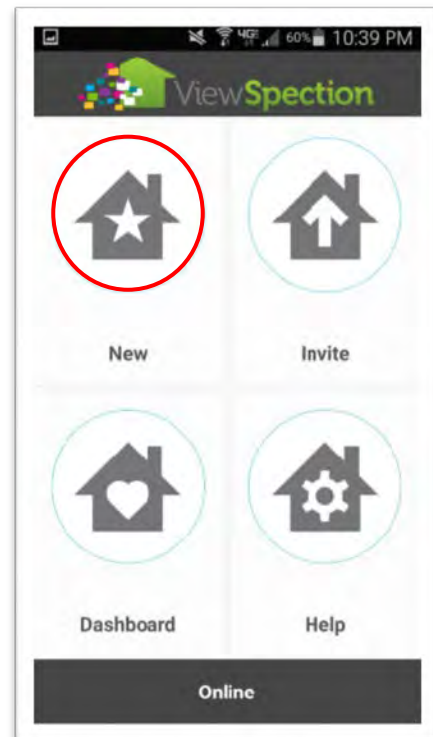
Navigation is easy. To begin, just tap a section:


**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.

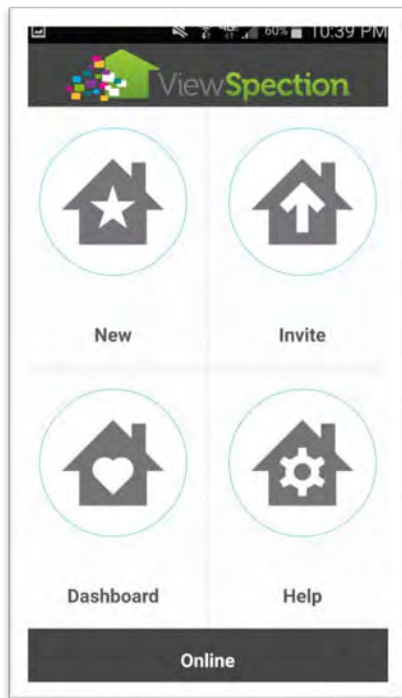
**Help** – Helpful tips to get you started.



During the survey, just tap  to go back to the previous screen.

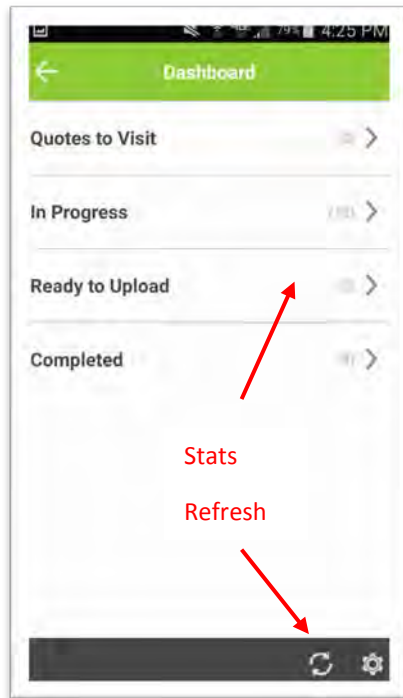
Tap **Next** to go to the next screen.

## Completing a ViewSpection Photo Survey



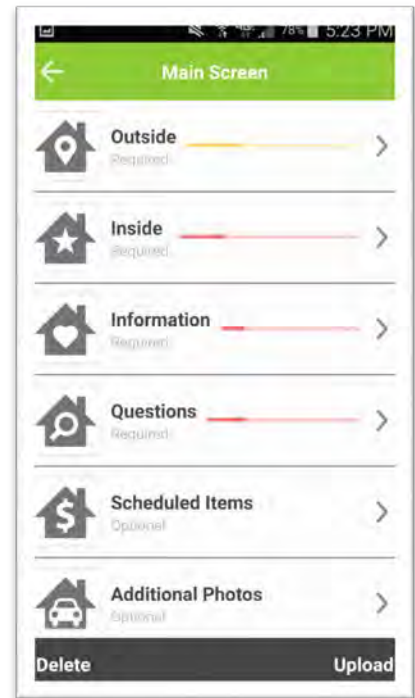
**Start Screen**

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



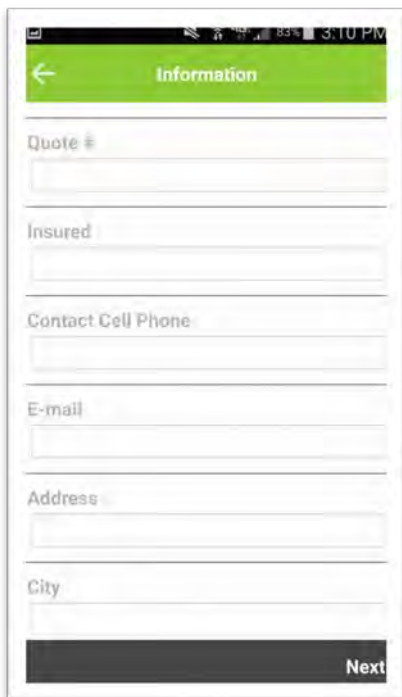
**Dashboard**

Gives you an overview of your ViewSpection Surveys.



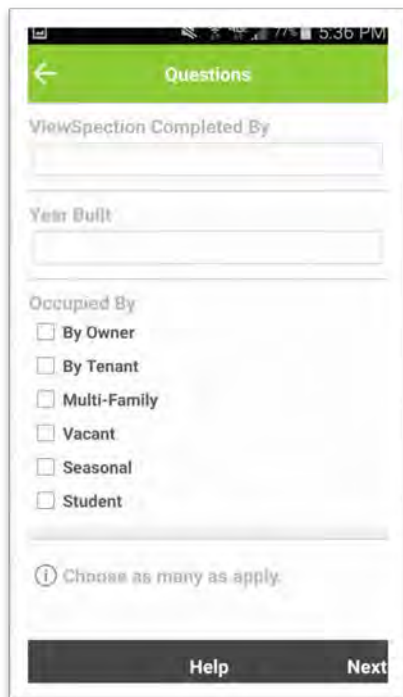
**Main Screen**

Start the photo survey by tapping on any section.



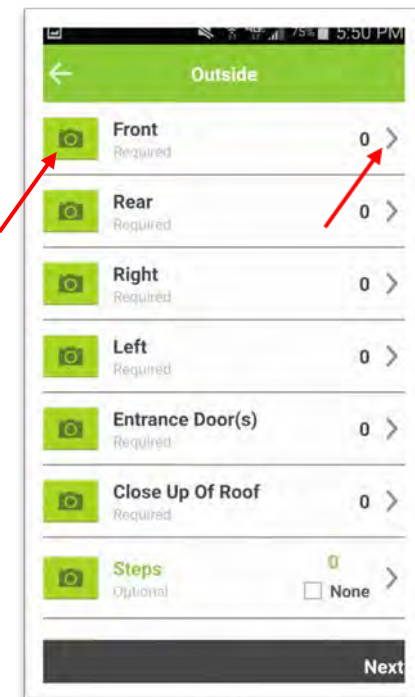
**Information Screen**

Entry screen for starting a new ViewSpection photo survey.




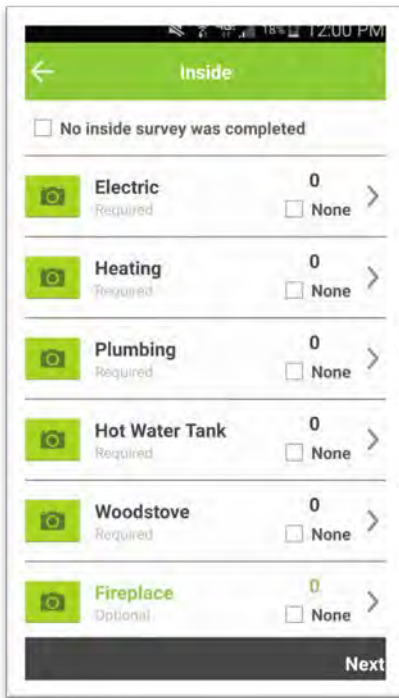
**Questions**

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





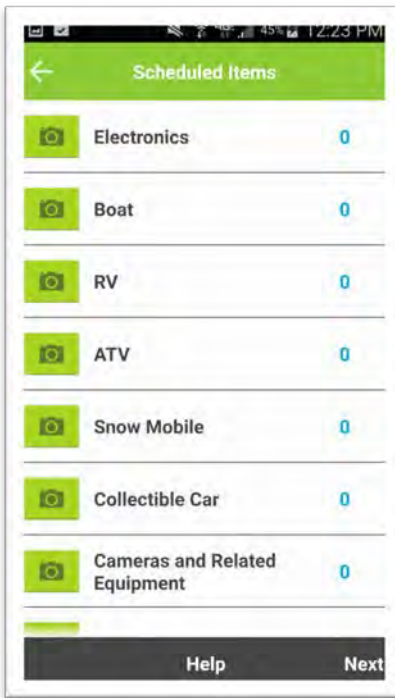
**Outside**

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



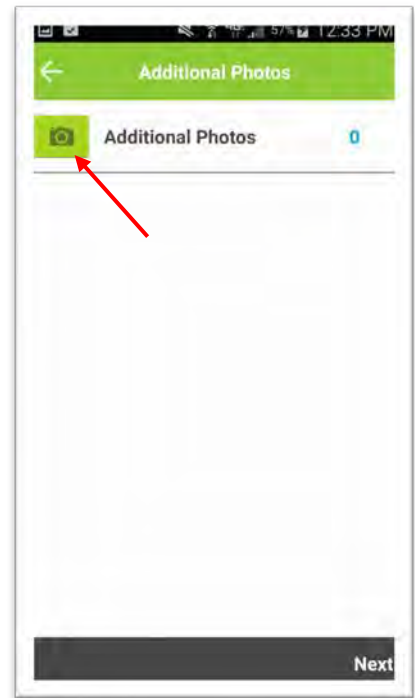
### Inside

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



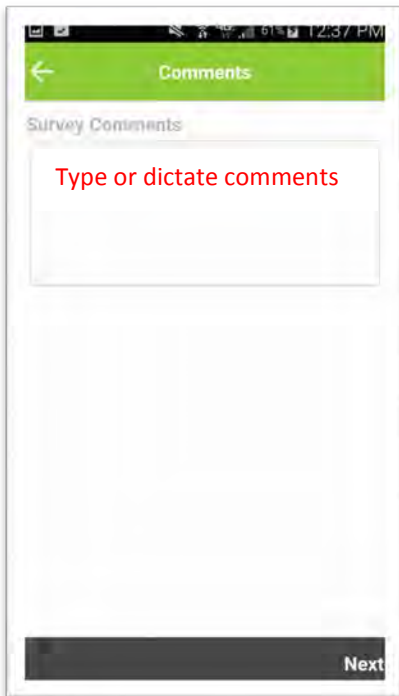
### Scheduled Items

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



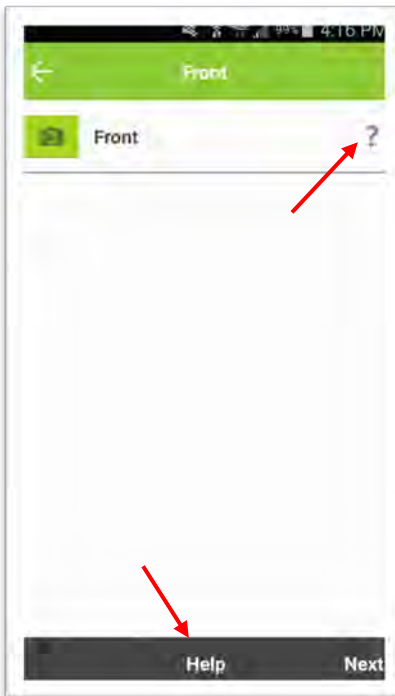
### Additional Photos

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.



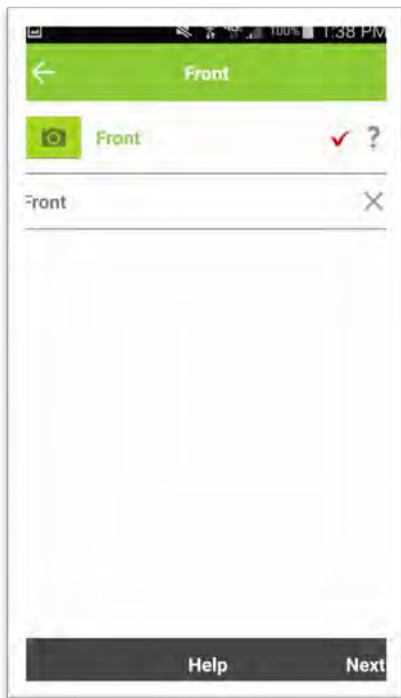
### Help

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



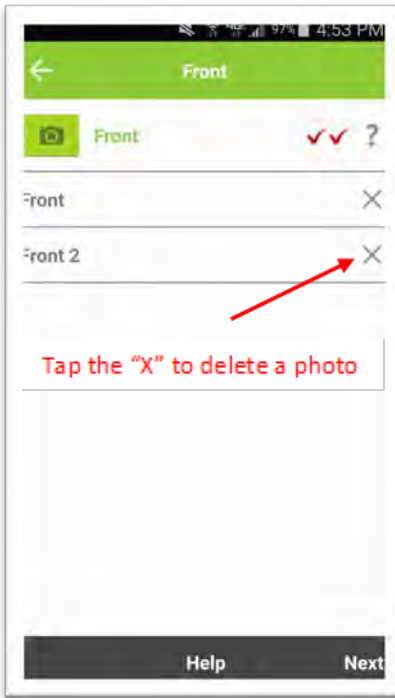
### Help Screen

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



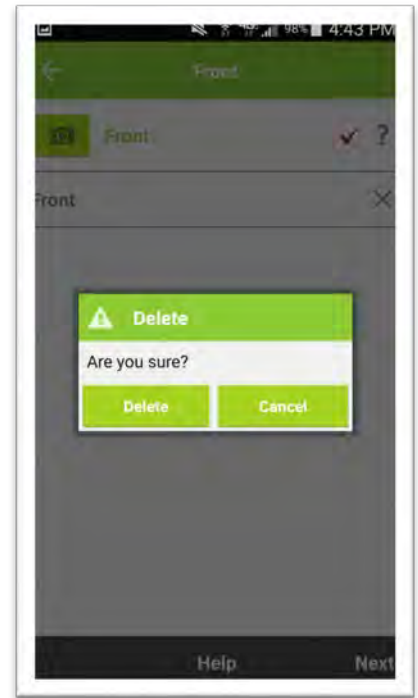
### Multiple Photos

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



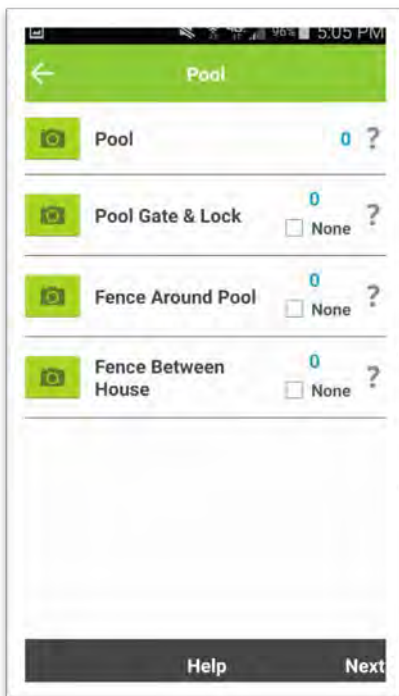
### Delete A Photo

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



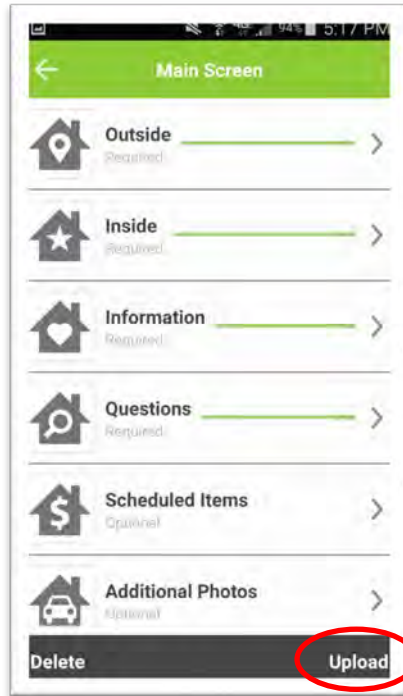
### Confirm Delete

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



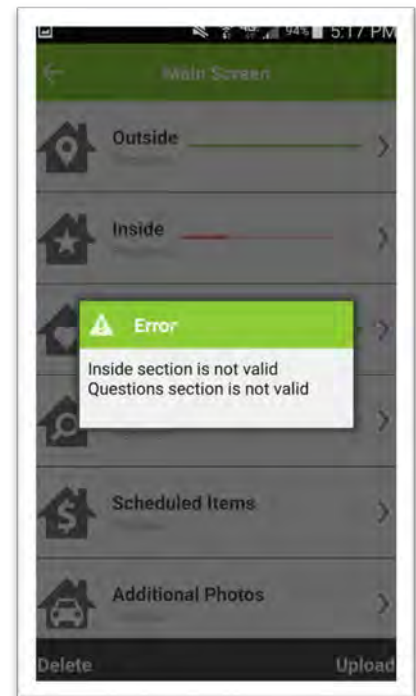
### Additional Options

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



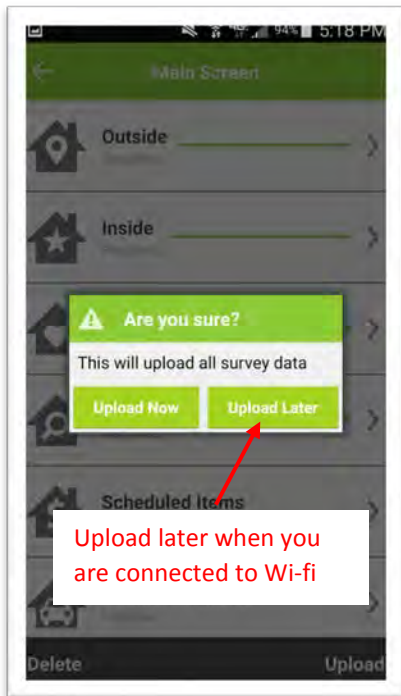
### Survey Status

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.



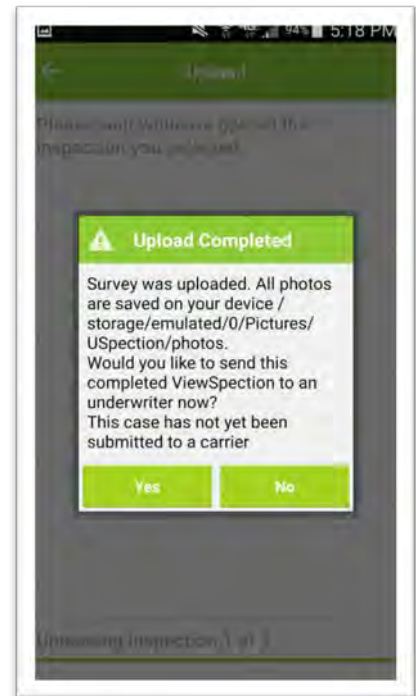
### Upload

When select Upload and all required sections are completed, you will get a confirmation message.



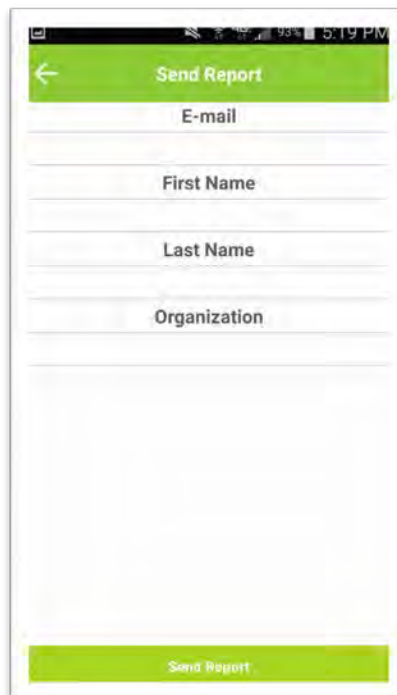
### Uploading Inspection

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



### Upload Completed

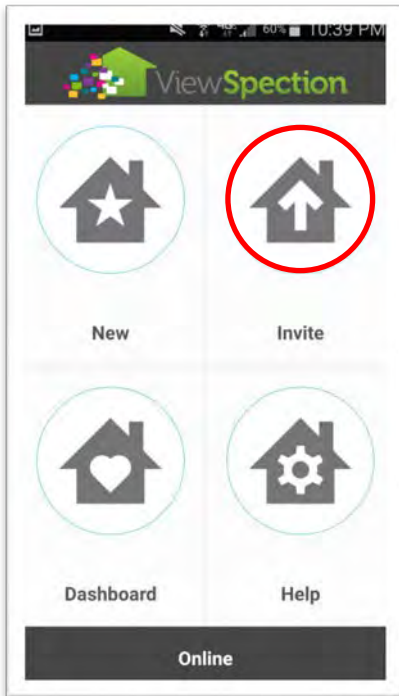
When the upload is completed, you will have an option to email the report to an underwriter.



### Send Report

To send a report to an underwriter, simply fill out the information and tap Send Report.

## The Policyholder's Experience



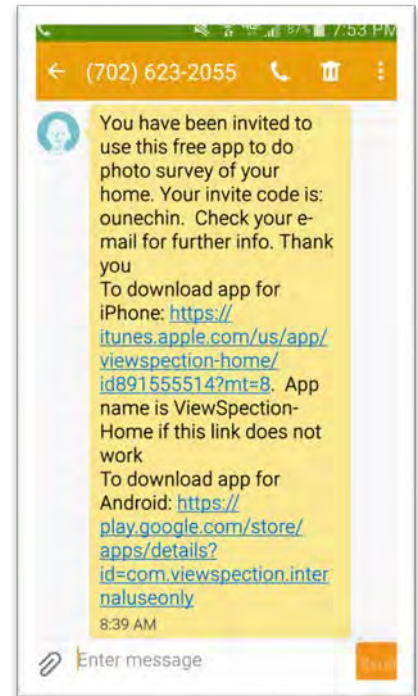
### Invite

Tap the invite button on the Start Screen.



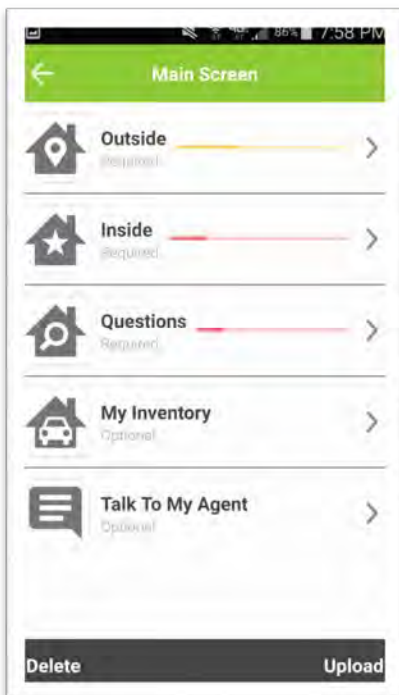
### Invite The Policyholder

Fill out the information on the form and tap Send.



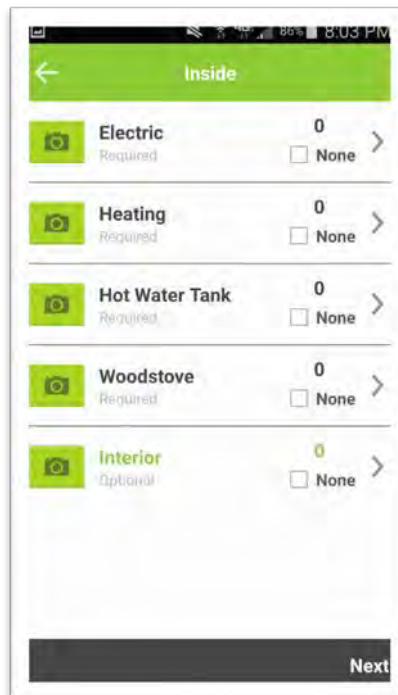
### Text Message

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



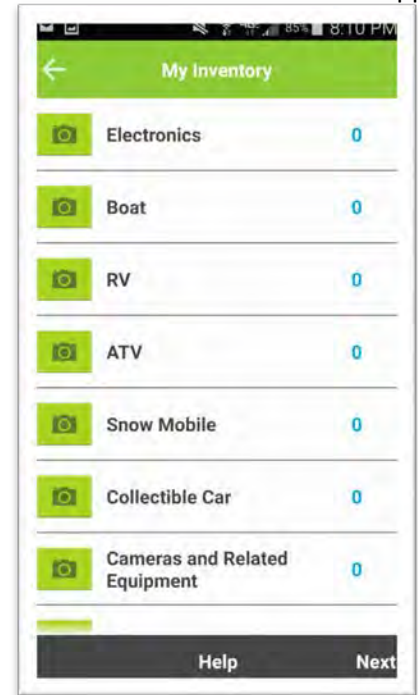
### Start Screen

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.

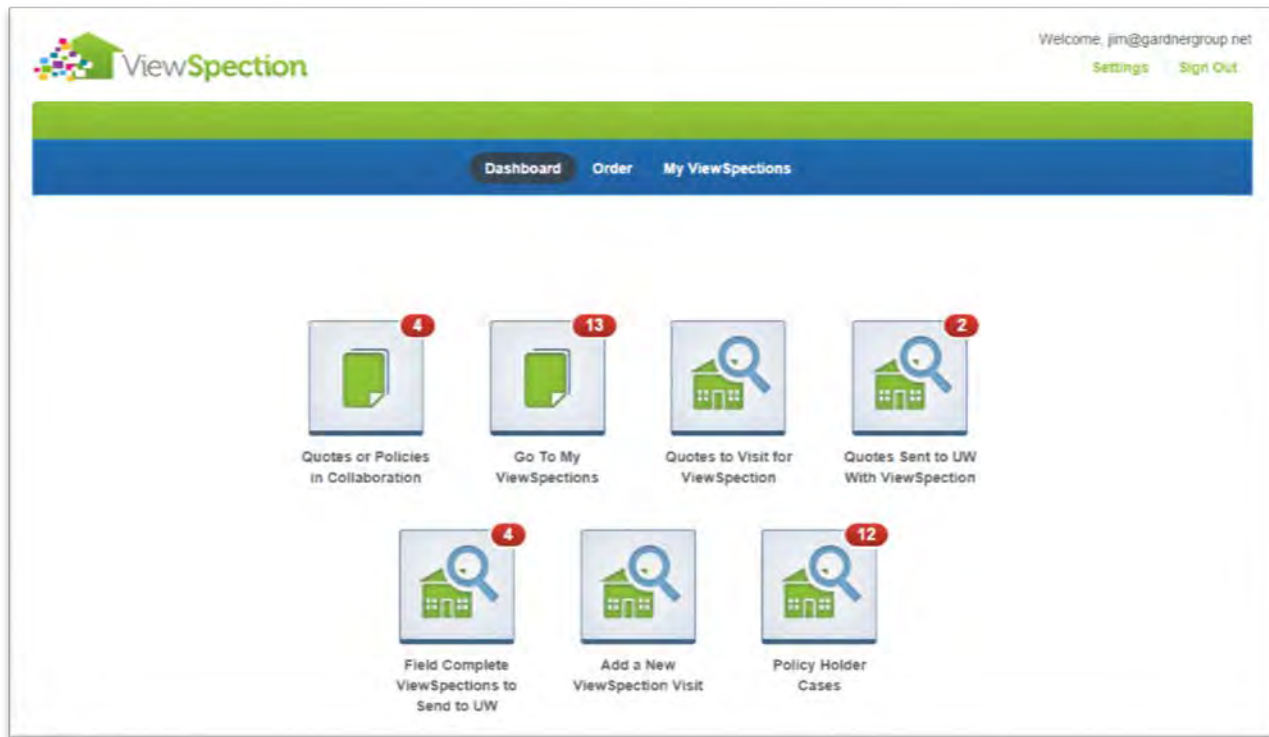
### Upload Confirmation

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

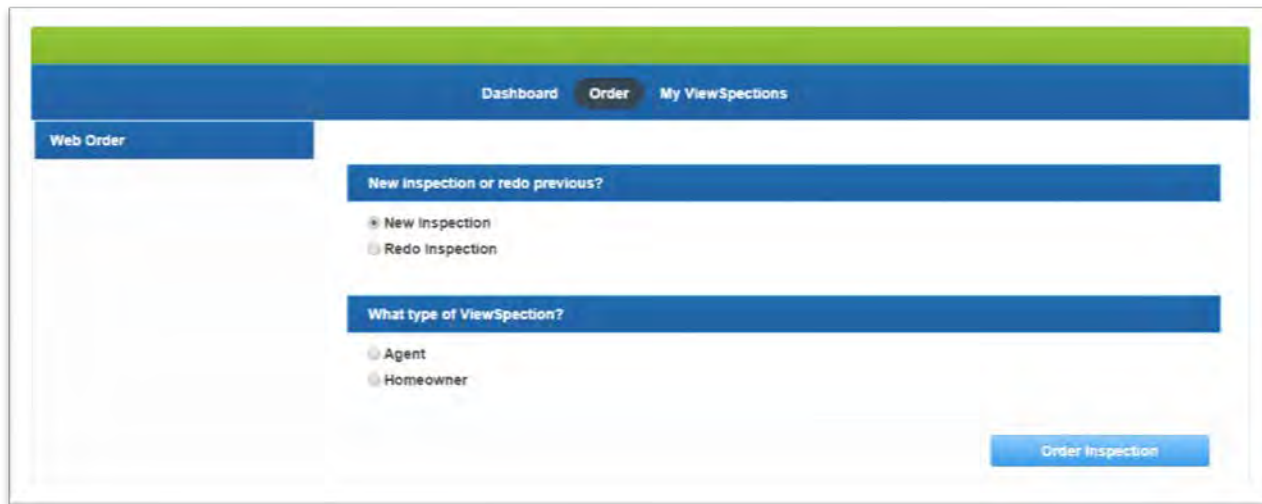


The dashboard is set up with multiple search options to allow you to quickly access information

- **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 ViewSpecctions from the Website:

Click on the Order button:



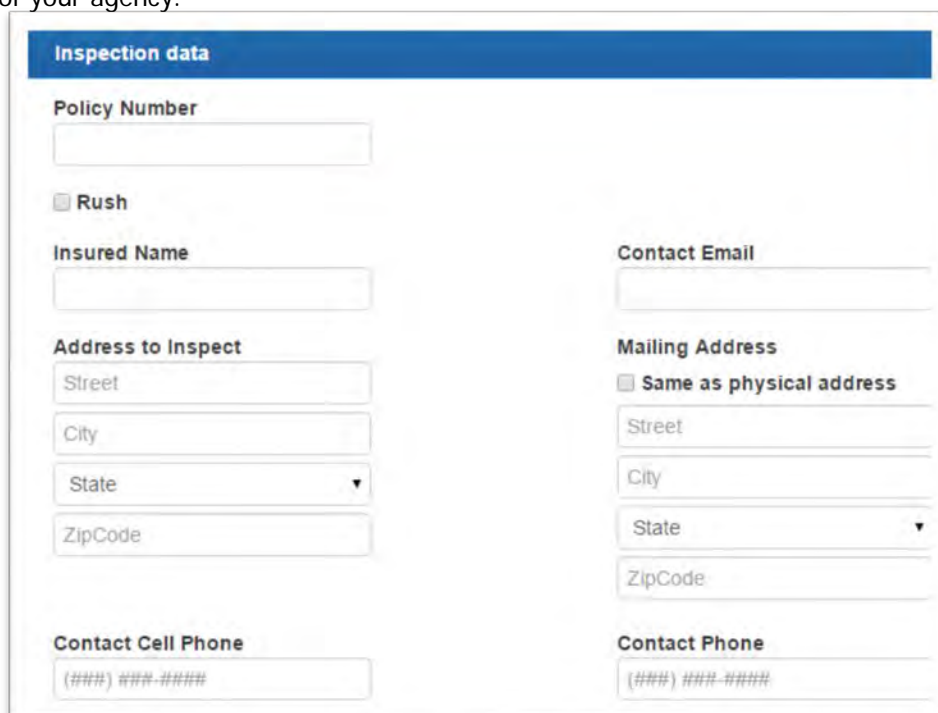
The screenshot shows the 'Order' page in a web application. At the top, there is a navigation bar with 'Dashboard', 'Order' (highlighted), and 'My ViewSpecctions'. Below this, a 'Web Order' sidebar is visible. The main content area has two sections: 'New inspection or redo previous?' with radio buttons for 'New Inspection' (selected) and 'Redo Inspection'; and 'What type of ViewSpecction?' with radio buttons for 'Agent' and 'Homeowner'. An 'Order Inspection' button is located at the bottom right.

You may order ViewSpecctions 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 ViewSpecction 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 ViewSpecction. 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 ViewSpecction to be completed by the homeowner.

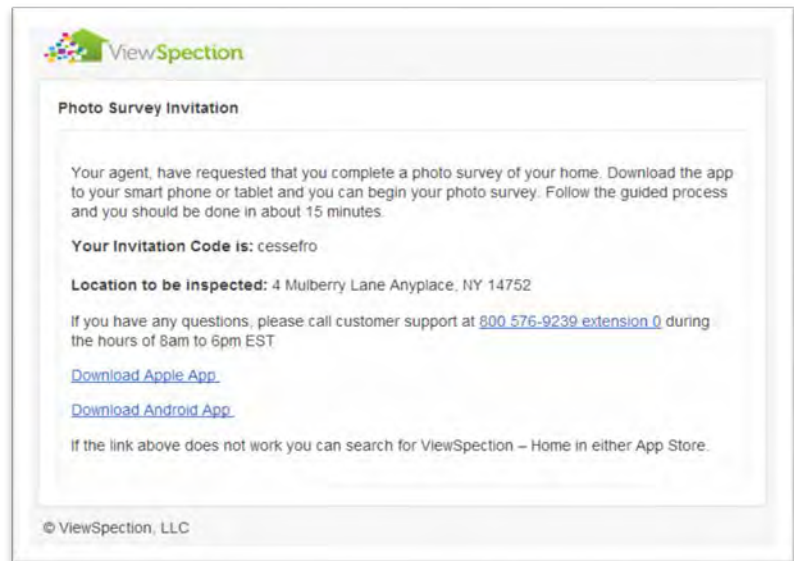
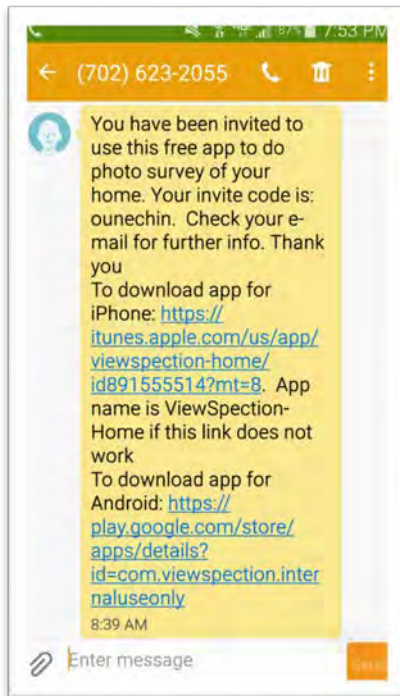
This is a sample of the fields that would need to be completed to order a ViewSpecction. Additional fields can be added based on the needs of your agency.



The form is titled 'Inspection data' and contains the following fields:

- Policy Number (text input)
- ☐ Rush
- Insured Name (text input)
- Contact Email (text input)
- Address to Inspect (text input)
- Mailing Address (text input)
- Street (text input)
- City (text input)
- State (dropdown menu)
- ZipCode (text input)
- Same as physical address (checkbox)
- Street (text input)
- City (text input)
- State (dropdown menu)
- ZipCode (text input)
- Contact Cell Phone (text input with mask (###) ###-####)
- Contact Phone (text input with mask (###) ###-####)

## Invitations to the Policy Holder

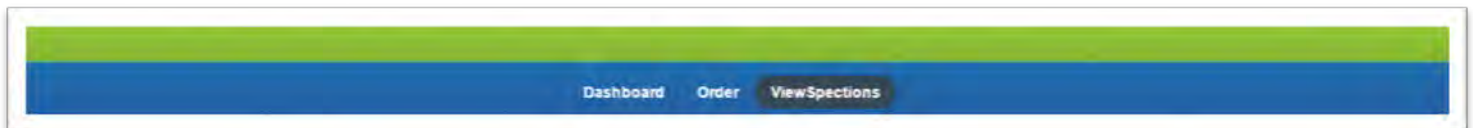


Each new order will generate both an e-mail as well as a SMS text invitation.

The policyholder will then download the app on their phone and log in with the provided Invitation Code.

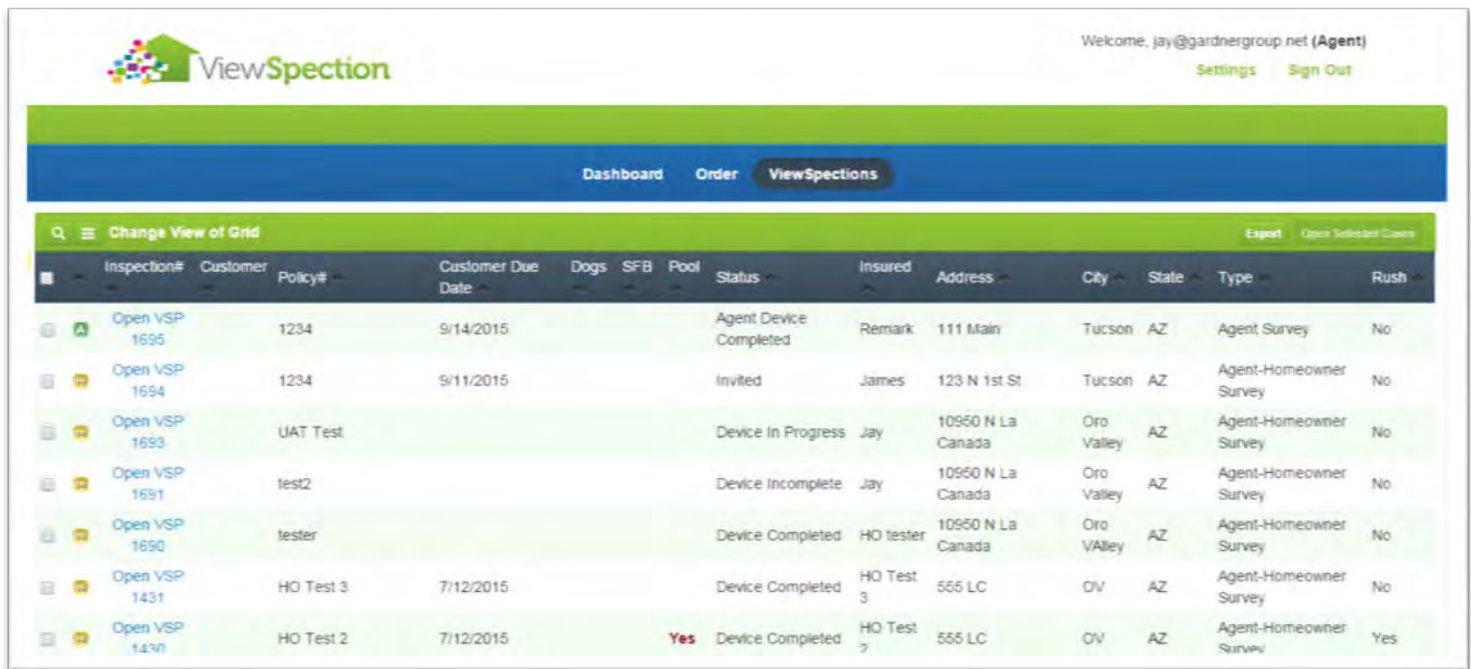
Encourage the policy holder to complete the ViewSpection as soon as possible. It should only take 15 minutes to complete.

## My ViewSpecions



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

## Getting Around-The Grid

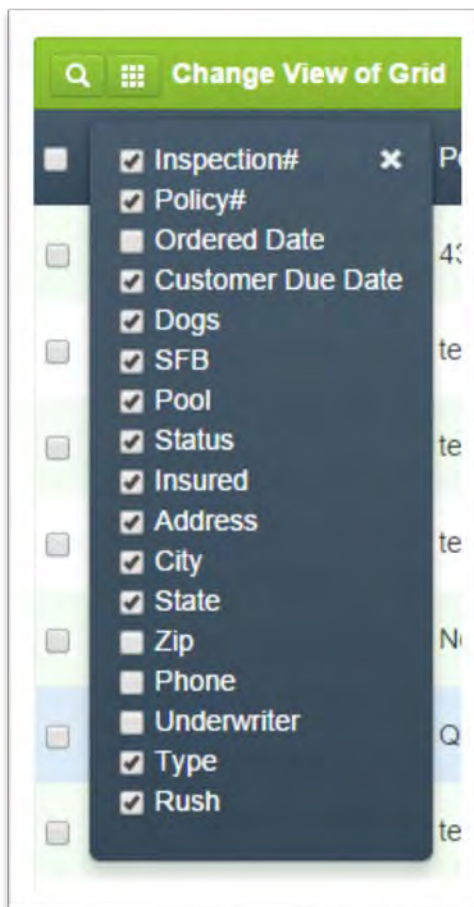


The screenshot shows the ViewSpection dashboard. At the top, there's a logo and a welcome message for 'jay@gardnnergroun.net (Agent)'. Below the logo, there are navigation tabs: 'Dashboard', 'Order', and 'ViewSpecions' (highlighted). A search bar and a 'Change View of Grid' button are visible. The main area is a table with columns: Inspection#, Customer, Policy#, Customer Due Date, Dogs, SFB, Pool, Status, Insured, Address, City, State, Type, and Rush. The table contains several rows of data, including 'Open VSP' cases and 'HO Test' cases.

Inspection#	Customer	Policy#	Customer Due Date	Dogs	SFB	Pool	Status	Insured	Address	City	State	Type	Rush
Open VSP 1695	1234	1234	9/14/2015				Agent Device Completed	Remark	111 Main	Tucson	AZ	Agent Survey	No
Open VSP 1694	1234	1234	9/11/2015				Invited	James	123 N 1st St	Tucson	AZ	Agent-Homeowner Survey	No
Open VSP 1693	UAT Test	UAT Test					Device In Progress	Jay	10950 N La Canada	Oro Valley	AZ	Agent-Homeowner Survey	No
Open VSP 1691	test2	test2					Device Incomplete	Jay	10950 N La Canada	Oro Valley	AZ	Agent-Homeowner Survey	No
Open VSP 1690	tester	tester					Device Completed	HO tester	10950 N La Canada	Oro Valley	AZ	Agent-Homeowner Survey	No
Open VSP 1431	HO Test 3	HO Test 3	7/12/2015				Device Completed	HO Test 3	555 LC	OV	AZ	Agent-Homeowner Survey	No
Open VSP 1430	HO Test 2	HO Test 2	7/12/2015			Yes	Device Completed	HO Test 2	555 LC	OV	AZ	Agent-Homeowner Survey	Yes

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

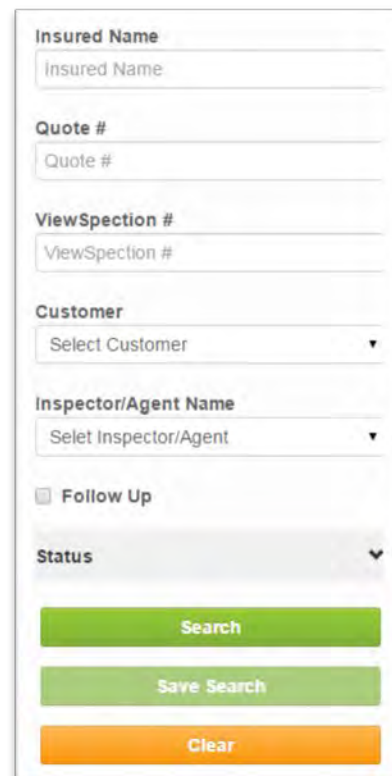
You may search for any cases by clicking the search icon in the upper left corner of the grid screen. You may search by:

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

These are cases which you have marked for follow up.

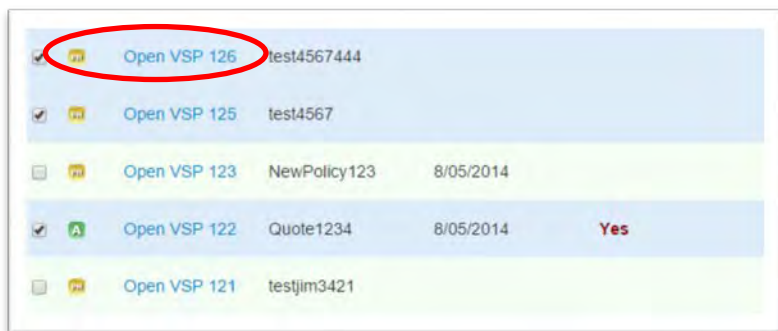
- Status Level

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



A vertical sidebar containing search filters. It includes input fields for 'Insured Name', 'Quote #', and 'ViewSpecction #'. Below these are dropdown menus for 'Customer' (with 'Select Customer' as the placeholder) and 'Inspector/Agent Name' (with 'Selet Inspector/Agent' as the placeholder). There is a checkbox for 'Follow Up' and a dropdown for 'Status'. At the bottom are three buttons: 'Search' (green), 'Save Search' (green), and 'Clear' (orange).

## Selecting Cases & Opening Cases



<input checked="" type="checkbox"/>		Open VSP 126	test4567444
<input checked="" type="checkbox"/>		Open VSP 125	test4567
<input type="checkbox"/>		Open VSP 123	NewPolicy123 8/05/2014
<input checked="" type="checkbox"/>		Open VSP 122	Quote1234 8/05/2014 Yes
<input type="checkbox"/>		Open VSP 121	testjim3421

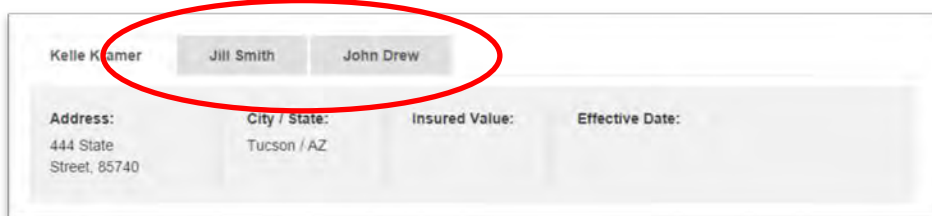
### Opening a Single Case

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.



A form for case details. At the top are three tabs: 'Kelle K.amer', 'Jill Smith', and 'John Drew'. The 'Kelle K.amer' tab is selected and circled in red. Below the tabs are four input fields: 'Address:' (444 State Street, 85740), 'City / State:' (Tucson / AZ), 'Insured Value:', and 'Effective Date:'.

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

Change View of Grid

ExportOpen Selected Cases

<div><div></div><div></div></div>	Inspection#	Customer	Policy#	Status	Insured	Address	City	Inspector/Agent
<div><div></div><div></div></div>	Open VSP 1700		0967654	New Case from Agent	Joe Smith	4 Main Street	Anytown	

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

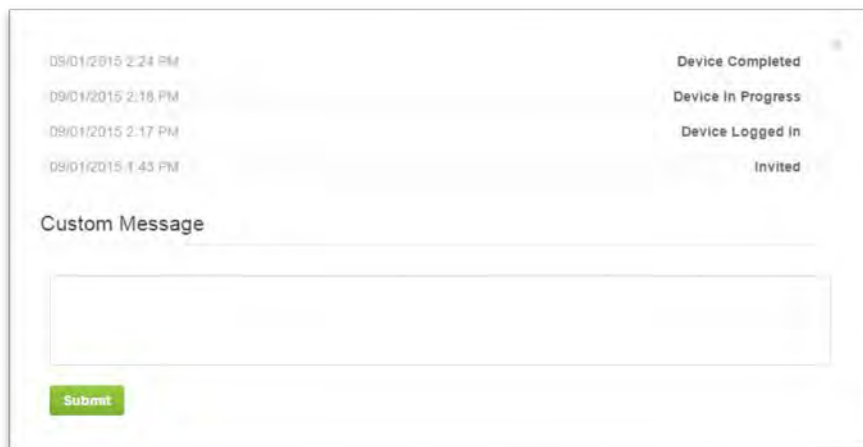
Status – This is the current status of the case

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



09/01/2015 2:24 PM Device Completed

09/01/2015 2:16 PM Device In Progress

09/01/2015 2:17 PM Device Logged In

09/01/2015 1:43 PM Invited

Custom Message

Submit

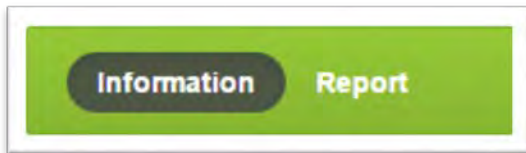
Status messages may be viewed by “rolling” your cursor over the status line for that case while in the grid view. The full status report will display for that case without the need to open the case.

**Watch these short videos for more:**

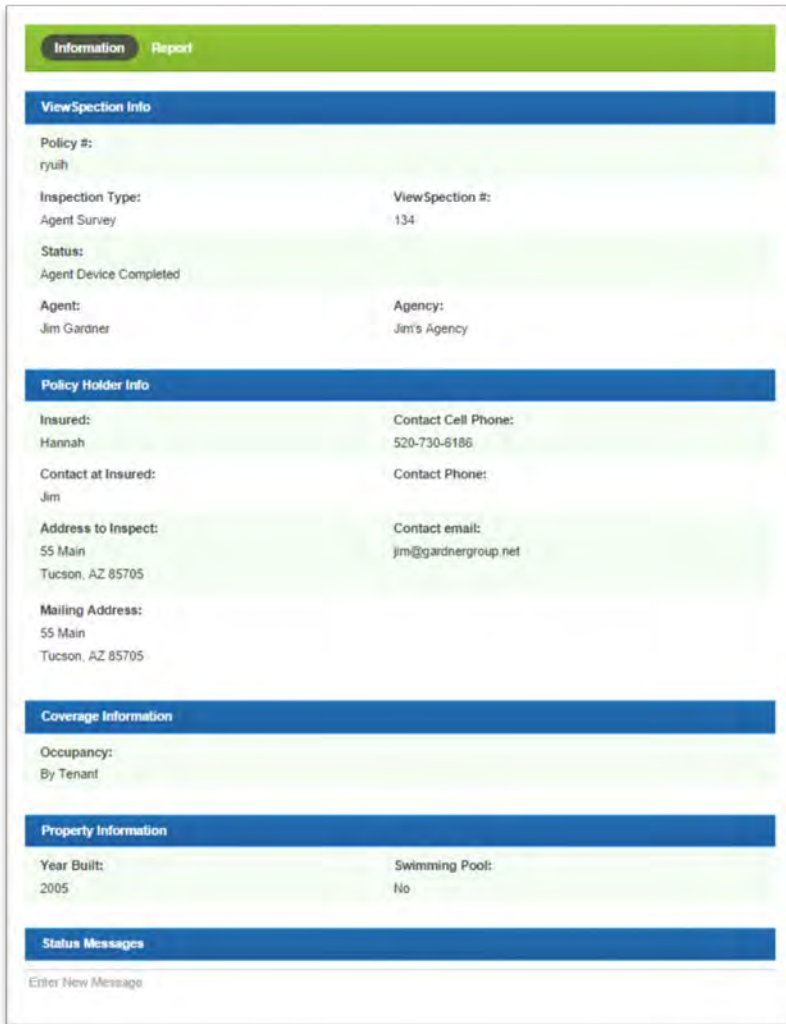
[The Grid](#)

[Sorting](#)

## Working with a ViewSpection



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



**Information** Report

**ViewSpection Info**

Policy #: ryuh

Inspection Type: Agent Survey ViewSpection #: 134

Status: Agent Device Completed

Agent: Jim Gardner Agency: Jim's Agency

**Policy Holder Info**

Insured: Hannah Contact Cell Phone: 520-730-8186

Contact at Insured: Jim Contact Phone:

Address to Inspect: 55 Main Tucson, AZ 85705 Contact email: jim@gardnergrouper.net

Mailing Address: 55 Main Tucson, AZ 85705

**Coverage Information**

Occupancy: By Tenant

**Property Information**

Year Built: 2005 Swimming Pool: No

**Status Messages**

Enter New Message

### 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.

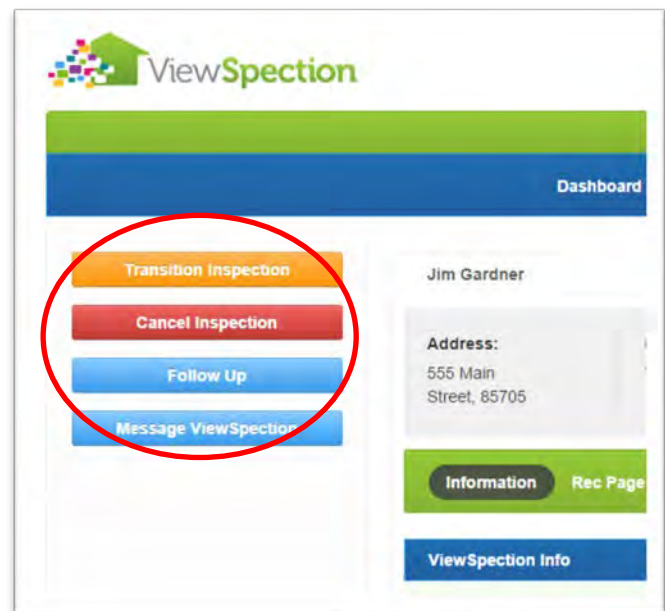
### Information Tab Sections

- 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.



*\*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.


  
Dwelling


  
Outbuildings


  
Roofing


  
Utility

  
Fuel Burner

  
Interior

  
Liability

  
Dogs

  
Pool & Hot Tub

Joe Smith

Address:  
4 Main Street , 13367

City / State:  
Anytown / NY

Insured Value:


Effective Date:  
9/15/2015

Information

Report

Download Images

Complete Report

Policy #:  
987654


Insured:  
Joe Smith

Address to inspect:  
4 Main Street Anytown, NY 13367

Completed By:  
Tom Guignard

ViewSpection #:  
1697

Property Snapshot



Year Built:  
1900

Dogs:  
Yes

Pool:  
Yes

Solid Fuel Burner:  
Yes

Questions

Date of Survey:  
9/15/2015


Person interviewed:  
Joe Smith


Insured Name:  
Joe Smith


Dwelling


Year Built:  
1900

Occupancy:  
By Owner

  
Front

  
Entrance Area

  
Entrance Area 2

  
Entrance Area 3

## 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.

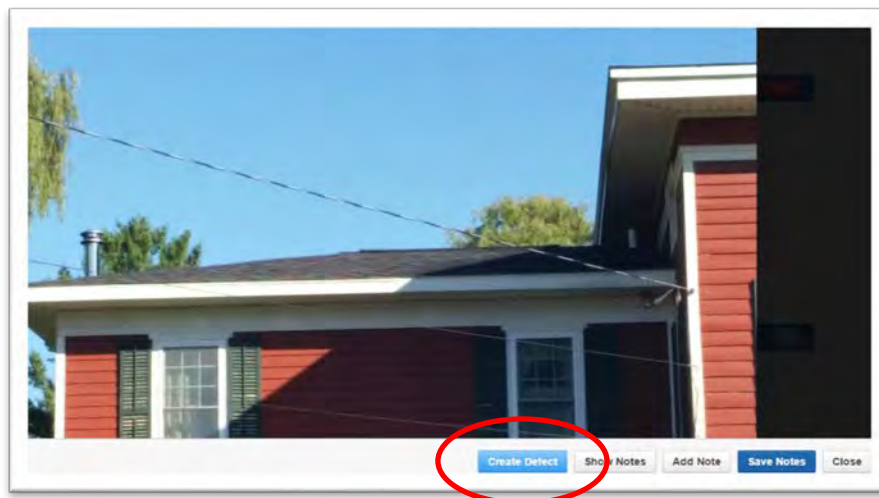
## Working with Images

Enlarging image



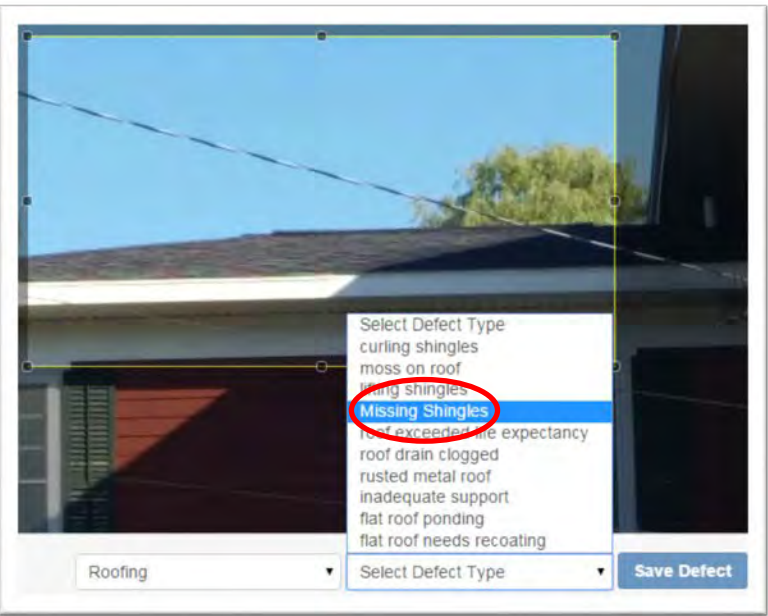
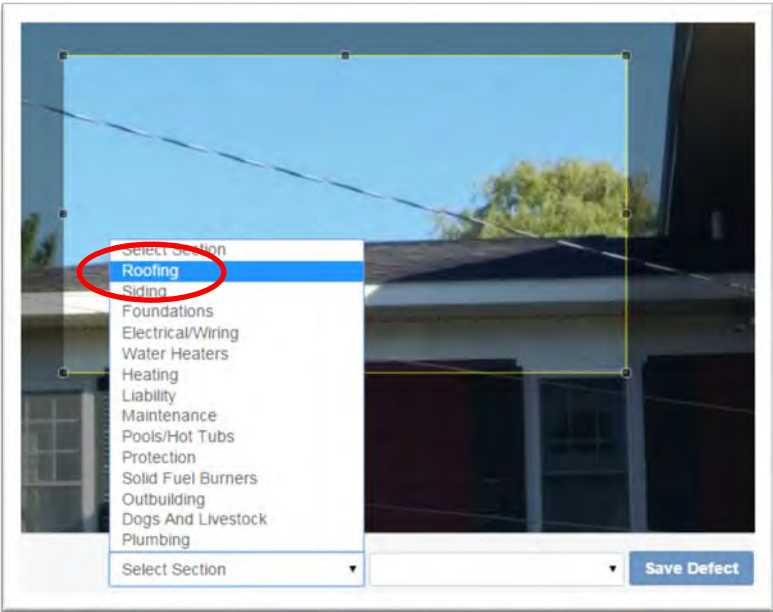
All images may be enlarged by clicking on the image for a view of the full size image

## 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:

Recommendations	
2014.1	There were missing shingles on the roof and they should be repaired or replaced.

## Completing Report

Joe Smith

Address: 4 Main Street, 13367 City / State: Anytown / NY Insured Value: Effective Date: 9/15/2015

Information Rec Page **Report** Download Image **Complete 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.

Dashboard Order My ViewSpections

On this screen you can choose to whom you would like to send the ViewSpection report to. You can select single or multiple recipients. You may add e-mail addresses which are already in ViewSpection or you may add your own. All carriers have initial free viewing of the reports that you send to them and do not need an account during their free period.

Inspection ID: Open VSP 123  
Insured: Jill Smith  
Address: 55 Stone St Somewhere, NY 14436  
Policy Number: Quole1234

Recipients: Select Existing User Add New User

Email: John@carrier.com  
First Name: John  
Last Name: Smith  
Organization: Carrier Insurance  
Add

Email	First Name	Last Name	Organization	Remove
No users selected				

Comment: Hi John, Here is the risk in Smalltown I was telling you about. Have a great day. Sue

Create

Information **Report** Complete Report

**Send Report to Selected Carriers**

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](mailto:Jay@viewspection.com)

520-975-1851