



VIEWSPECTION CUSTOMER ADMIN USERGUIDE

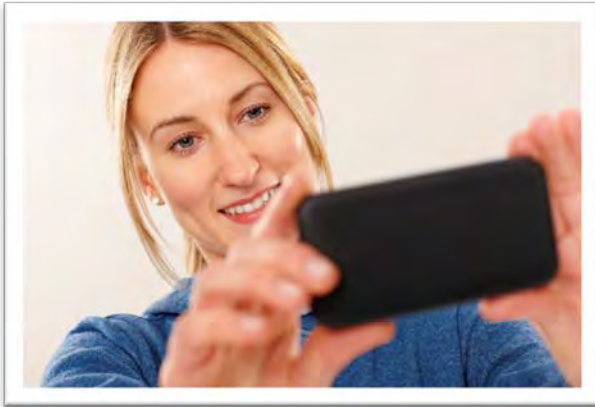
Step by step guide for getting the most out of ViewSpection!

Version 2.0

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ViewSpection Customer Admin User Guide



The ViewSpection website is designed to give you an easy to use tool to manage your ViewSpection reports and your other users, Underwriters and In House Inspectors.

ViewSpection is your access point for virtual, photographic tours of properties you are insuring, and those you are considering to write. ViewSpection surveys are completed by your agents, policyholders, vendor inspectors and in-

house inspectors, and are a detailed, image centric report on the exposures at the risk.

What are some of the possible uses for ViewSpection?

- App driven, best practice field tool for your agents which lets them instantly produce a pro-grade submission report with each photo they take.
- Invite policyholders to provide a virtual tour of their property and get views of both the exterior and interior of the risk.
- Discover more opportunities for coverage with scheduled coverages photo module.
- Provides a new channel for agents to interact with clients and prospects when they review ViewSpection virtual tour together and identify insurance gaps.
- Rural or Seasonal Properties
- ViewSpection is great for Renewal Programs

We are always looking for feedback and development ideas. Please feel free to contact our support department with any feedback or requests for services and we will be glad to help.

The ViewSpection Team

Getting Started

Signing Up & Signing In

Please contact the [ViewSpection Support team](#) to be provided with a login and password
Link to the ViewSpection site: <http://app.viewspecion.com/Account/SignIn>



The image shows a 'Sign In' form with the following fields and elements:

- Username or Email:** A text input field with the placeholder text 'Type your username or email address'.
- Password:** A text input field with the placeholder text 'Type your password' and a small eye icon for toggling visibility.
- Remember me?:** A checkbox.
- Login:** A green button.
- Forgot password?:** A blue link.

Enter your username and your password and click Login

The Grid

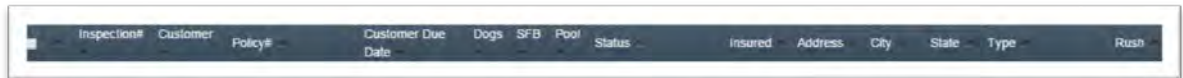
Upon logging in, you will start at "The Grid".
At the top you can also order an inspection (see page 15)



The screenshot shows the 'ViewSpecions' grid interface. It includes a search sidebar on the left and a main table of inspection records. The table has columns for Inspection#, Customer, Policy#, Customer Due Date, Dogs, SFB, Pool, Status, Insured, Address, City, State, Type, and Rush.

Inspection#	Customer	Policy#	Customer Due Date	Dogs	SFB	Pool	Status	Insured	Address	City	State	Type	Rush
Open VSP 1278	Test Customer	5152015CC	6/12/2015				Inspector Assigned	Pat Beneta	4 Main Street	Las Vegas	NV	Vendor Residential No Exterior	
Open VSP 1284	Test Customer	5152015BB	6/12/2015				Inspector Assigned	Ringo Starr	4 Main Street	Las Vegas	NV	Vendor Residential No Exterior	
Open VSP 1281	Test Customer	5152015AA	6/12/2015				Inspector Device Completed	Bob King	4 Main Street	Las Vegas	NV	Vendor Residential No Exterior	

The Grid will be a list of all your ViewSpection reports and can be sorted and viewed however you want. There are many columns on the grid.



This is a close-up of the header row of the grid table, showing the following columns from left to right:

Inspection#	Customer	Policy#	Customer Due Date	Dogs	SFB	Pool	Status	Insured	Address	City	State	Type	Rush
-------------	----------	---------	-------------------	------	-----	------	--------	---------	---------	------	-------	------	------


- **Inspection #-** This is the internal ViewSpection system number
- **Policy #-** This is quote or policy number that you assign at submission
- **Hazards-** These are “hazards” or items which are of particular interest for insuring purposes and are called out on the “grid” for easy selection and viewing. Dogs, SFB, Pool, etc
- **Status-** tells you where the case is in the process: Completed, Report opened, Report sent from agent, etc
- **Address to be inspected and more**

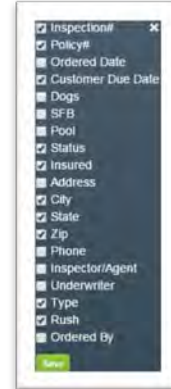
Searching the Grid



To show only what you want or need

Search
Change Grid

Click this icon  to change what displays on your grid. Check the boxes you want to see and Save. To close the window click X at top right corner of pop up



Search Fields

Insured Name
Insured Name

Policy #
Policy #

ViewSpecion #
ViewSpecion #

Follow Up

Underwriter

Due Date

Status

Recommendations

Search

Clear

You can scroll down the grid to look for the desired report or you can perform a search for a specific report. You can search by Insured name, policy number or ViewSpecion number

Additional search fields include Search by UW, Due date, status of the ViewSpecion and # of Recommendations

Once you have searched and found the case you are looking for, simply click on the link from the grid to open the report.

Inspection#	Policy#	Ordered Date
Open VSP 624	HO_100001026	3/19/2015
Open VSP 621	HO_003097657	3/19/2015
Open VSP 216	PHO0100905603	12/17/2014
Open VSP 181	test5	12/03/2014
Open VSP 179	test policy2	12/03/2014

Information Tab

The Information tab displays:

ViewSpection Info	
Customer: Customer A	Policy #: 2348754 HOUERT
Inspection Type: Customer-Homeowner Survey	ViewSpection #: 47
Status: Completed	
Customer Agent: Jim Smith	Customer Agent Phone: 5555555555
Underwriter Name: Jill Smith	Underwriter Phone: 5555555555
Underwriter Email: jim@gardnergroup.net	

ViewSpection Info
The basic information is displayed here which relates to the type of ViewSpection ordered, agent info, etc.

Policy Holder Info
This section contains the policy holder specific information which was entered in the ordering process.

Policy Holder Info	
Insured: Hannah Gardner	Contact Cell Phone: 520-730-6186
Contact at Insured: Jim	Contact Phone: 555-555-5555
Address to Inspect: 44 Oak Street Geneseo, NY 14454	Contact email: jim@gardnergroup.net
Mailing Address: 44 Oak Street Geneseo, NY 14454	
Invitation Code: mberyces	

Coverage Info

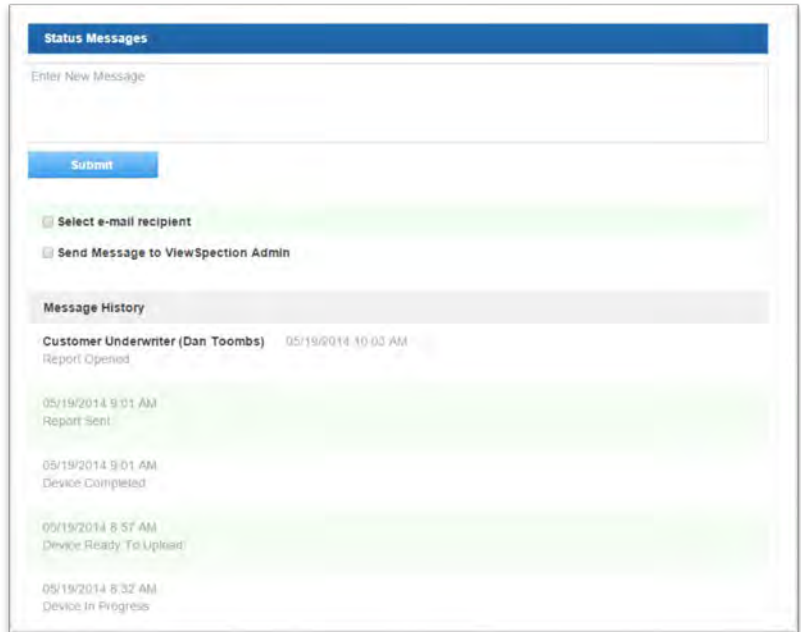
If provided by customer, building coverage info appears here.

Coverage Information	
Building: \$100,000	Operations: This is a dwelling
Occupancy: By Owner	
Contents: \$10,000	

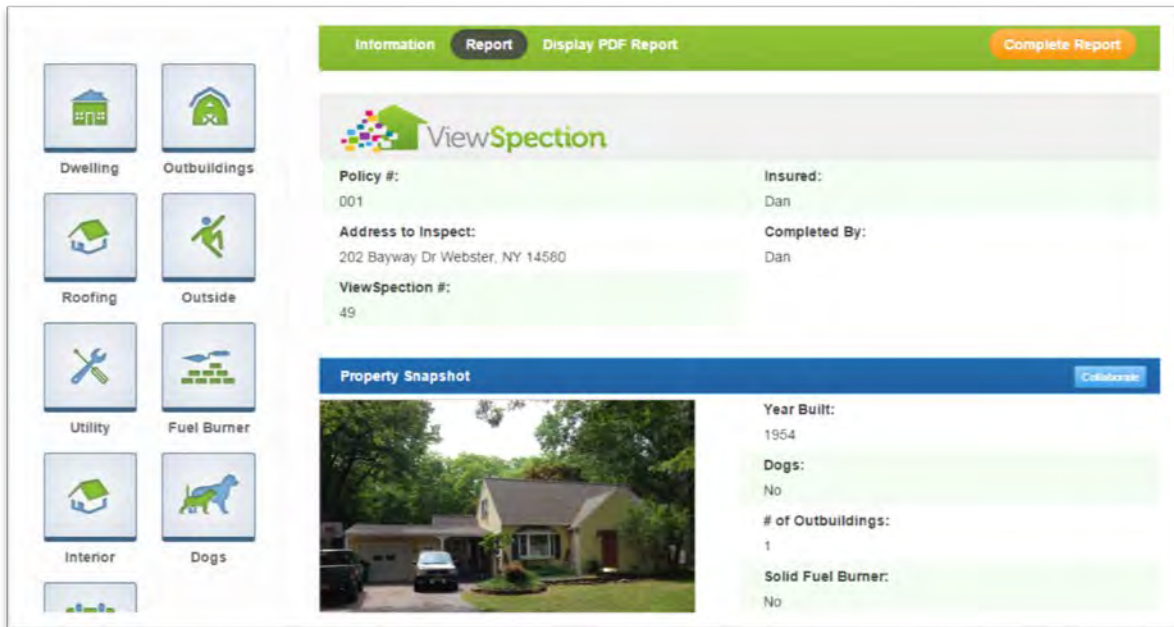
Status Messages

Status information for the case is in the bottom section of the Information tab. You can input status messages yourself to assist you in noting action points on the case.

Also, status points will be tracked automatically as different tasks are completed on a case such as the app being accessed or the ViewSpection is uploaded.



Report Tab



The Report Tab is the default screen which opens when you access a case. This is the best way to take advantage of the powerful tools of ViewSpection such as the Defect Wizard and High Definition sized images.

Navigation Tabs-

Located at the left side of the screen when you open your report.

Simply click on any of the icons and you jump directly to that page/section of the report.



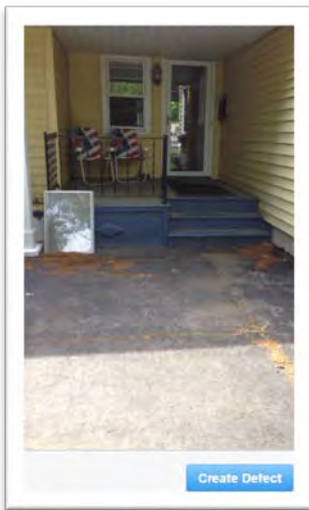
Note the Protection Icon

above, it has **1** in top corner. That indicates that there is 1 recommendation on that page. Click on the icon to go directly to that

page/section of the report.



Adding Defects



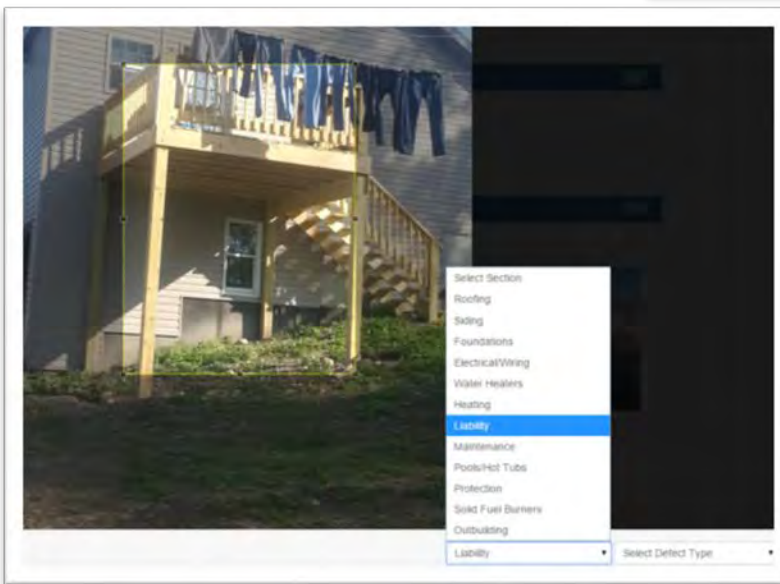
As you look through the report you notice a hazard and you want to add a recommendation simply click on the photo that shows the hazard- this will open up a new window where you can create the defect.

Click Create Defect

Now you can zoom in to the desired section of the photo you want by dragging the yellow box



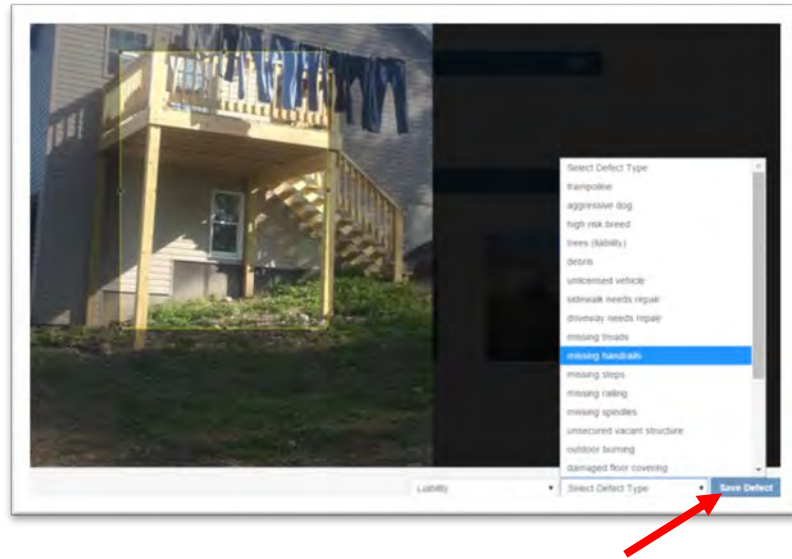
Defect Wizard



Select Class of Defect
In this situation you want a rec for missing handrail so select Liability from the Select Section drop down menu

Select Type of Defect
For defect type select
missing handrail from
the drop down menu.

Then click Save Defect



Reviewing Recommendations

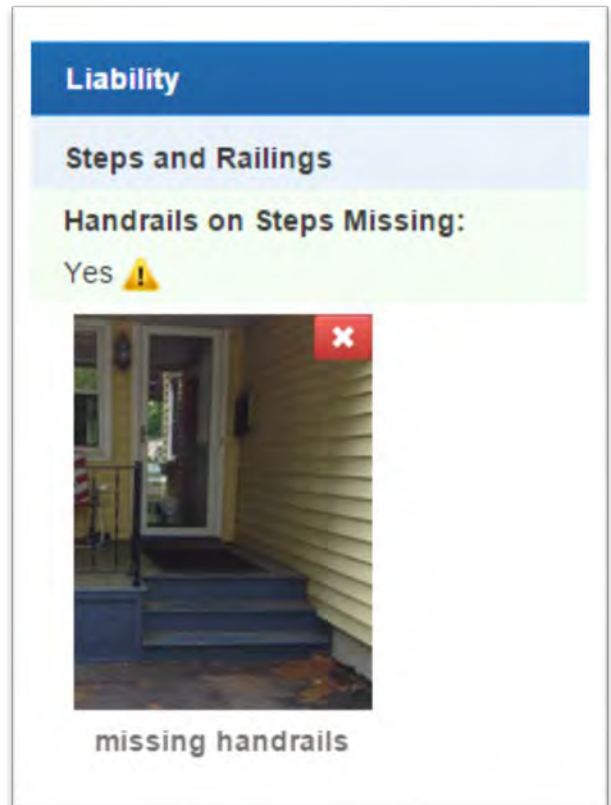


When you go back to the report you will notice that 3 things happened.

First, you now have an alert that there is a liability recommendation on the left side of the report where the Icons are listed.

Second, the photo you edited now appears in the liability section with the label of missing handrail.

Third, the recommendation is made.

















Rec Page Tab





















If Recommendations have been added to a report. You can view them by clicking on the Rep Page button. This will open the page that lists the recommendations

Rec Page Screen

Recommendations				Fields	Edit	Delete
Export	Defect	Rec #	Recommendation			
<input type="checkbox"/>		2014.1	The vent from the hot water tank to the chimney was noted to be improperly connected. The vent pipe should be re-installed or replaced to reduce the liability hazard.			
<input type="checkbox"/>		2014.2	The shingles on the roof are lifting and the roof should be repaired by a professional contractor to reduce the wind damage exposure			
<input type="checkbox"/>		2014.3	The steps at {area} should be provided with handrails. Handrails should be provided on all steps with three or more risers. The height of handrails is to be from 34' to 38' high, measured from the nose of the tread. If stairs are more than 44' wide, handrails are to be provided on each side. If stairs are 88' wide or more, install the handrails on both sides, with intermediate handrails in the center.			
<input type="checkbox"/>		2014.4	The missing cover on the furnace should be replaced to reduce the fire hazard.			

[Export Selected Recommendations](#)

Exporting Recommendations as Word Doc


Recommendations				Fields	Edit	Delete
Export	Defect	Rec #	Recommendation			
		2014.1	The vent from the hot water tank to the chimney was noted to be improperly connected. The vent pipe should be re-installed or replaced to reduce the liability hazard.			
<input type="checkbox"/>		2014.2	The shingles on the roof are lifting and the roof should be repaired by a professional contractor to reduce the wind damage exposure			
		2014.3	The steps at {area} should be provided with handrails. Handrails should be provided on all steps with three or more risers. The height of handrails is to be from 34' to 38' high, measured from the nose of the tread. If stairs are more than 44' wide, handrails are to be provided on each side. If stairs are 88' wide or more, install the handrails on both sides, with intermediate handrails in the center.			
<input type="checkbox"/>		2014.4	The missing cover on the furnace should be replaced to reduce the fire hazard.			

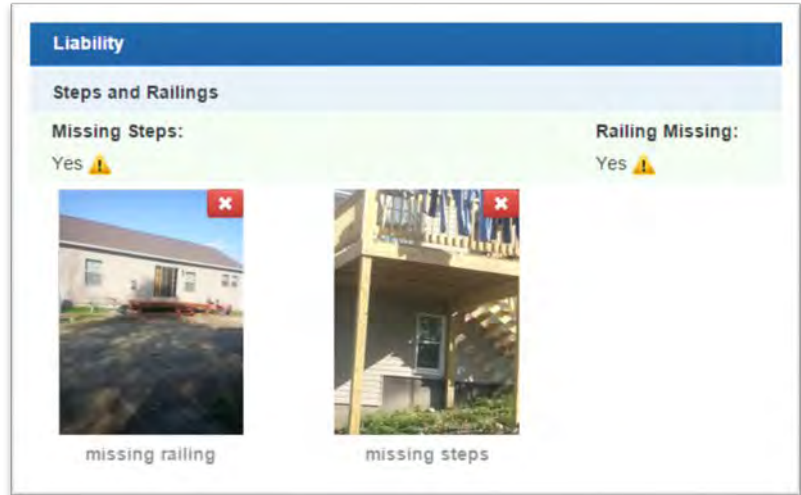
[Export Selected Recommendations](#)

You can create a word document that lists all the recommendations that you can then save to your computer for future use. Here are the steps:

- Simply Click on the recommendations you would like to export
- Click Export on desired recommendations
- You will be asked where on your computer you would like to save this document

Removing Defects

Note the  in the corner of the photo. If you are not happy with this photo or made the recommendation in error, you can delete it by clicking the red X and this will remove the photo and the recommendation.



Completing your report

When you have completed review of the report you then click on complete report



Saving your Report

You can also save/download a pdf of the report if you wish. click on



This will open up the pdf of the report

Use the adobe tool bar to click on the save icon and then enter where you would like to save the report on your computer.



Ordering and Transitioning an Inspection

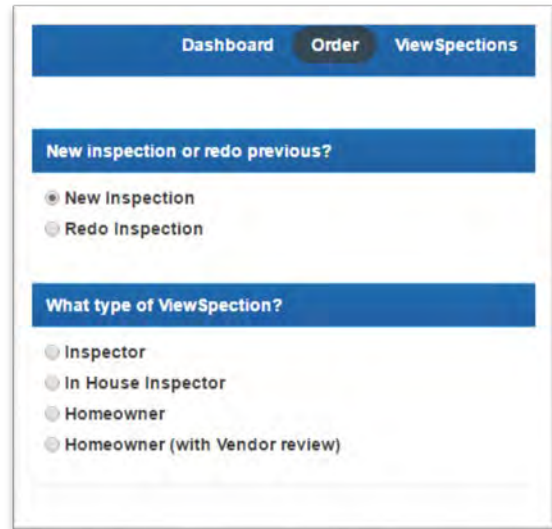
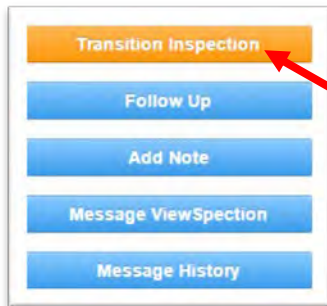
Click **Order** to order an inspection.

On this screen you can order an inspection from an In House Inspector, a Vendor Inspector of your choice, or you can send an invitation to the homeowner to do a photo survey of their property.

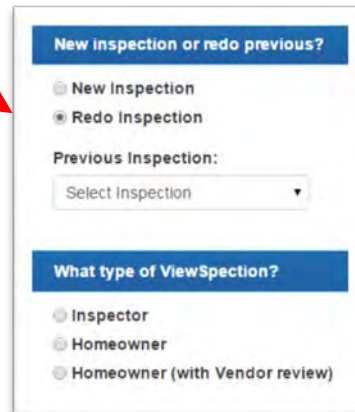
Just fill out the information and click



At the bottom of the page.

A screenshot of a web application interface. At the top, there are three tabs: "Dashboard", "Order" (which is highlighted), and "ViewSpection". Below the tabs, there are two sections. The first section is titled "New inspection or redo previous?" and contains two radio button options: "New Inspection" (selected) and "Redo Inspection". The second section is titled "What type of ViewSpection?" and contains four radio button options: "Inspector", "In House Inspector", "Homeowner", and "Homeowner (with Vendor review)".A vertical stack of five buttons. The top button is orange and labeled "Transition Inspection". Below it are four blue buttons labeled "Follow Up", "Add Note", "Message ViewSpection", and "Message History". A red arrow points from the "Transition Inspection" button towards the text on the right.

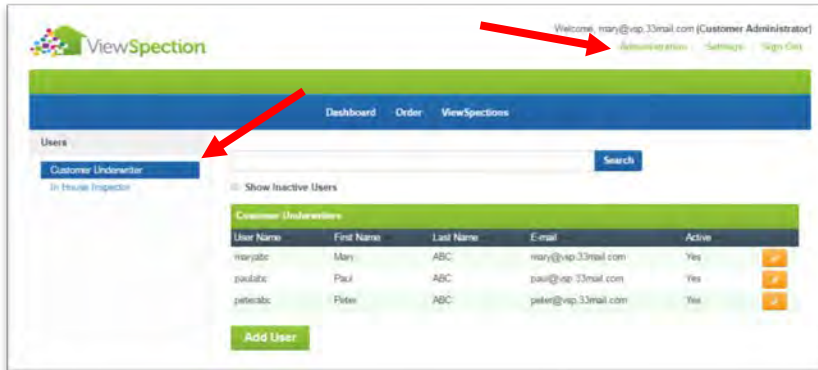
From the information screen of a ViewSpection (see pg 7) you can transition the inspection, to order another inspection from a field inspector or homeowner.

A screenshot of a web application interface. At the top, there are three tabs: "Dashboard", "Order", and "ViewSpection" (which is highlighted). Below the tabs, there are two sections. The first section is titled "New inspection or redo previous?" and contains two radio button options: "New Inspection" and "Redo Inspection" (selected). Below this is a "Previous Inspection:" label and a dropdown menu with the text "Select Inspection". The second section is titled "What type of ViewSpection?" and contains three radio button options: "Inspector", "Homeowner", and "Homeowner (with Vendor review)". A red arrow points from the "Transition Inspection" button in the previous image to the "Redo Inspection" option in this screenshot.

Administration

Adding an Underwriter or In-House Inspector:

First click on the Administration link in the upper right hand corner

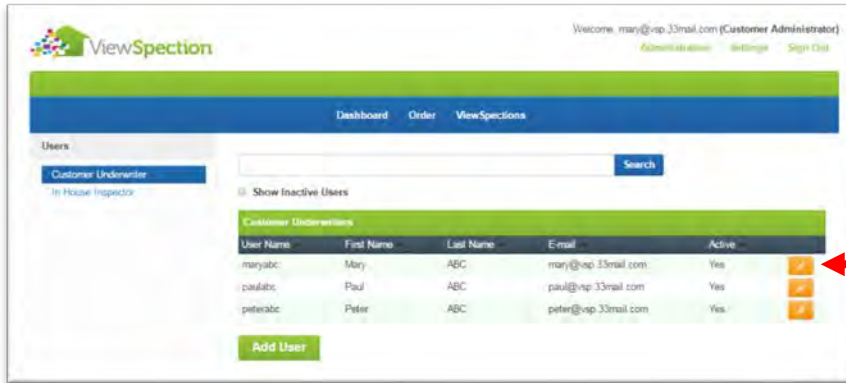



Choose a user category, Customer Underwriter or In House Inspector, then add a user by clicking **Add User**

On the next screen you can add the user's login information, user rights and contact information.

The screenshot shows the user creation form. Red arrows point to the following sections: "Login" (with fields for Username, Password, and Confirm Password), "Name" (with fields for First Name and Last Name), "Physical Address" (with fields for Email, Phone, Cell Phone, Street, City, State, Zip Code, and Timezone), "Customers" (with a search bar and a list of customers, including "ADC Insurance Company"), and the "Save" button at the bottom.

Be sure to click the **+** under Customers in order to associate the user with your company. Then click **Save** at the bottom of the page.



Also, from the Admin screen you can edit user information by clicking 

Support:

For questions or technical assistance please contact:

Jay Kramer at 520-975-1851 or email at Jay@viewspection.com