



VIEWSPECTION UNDERWRITER'S GUIDE

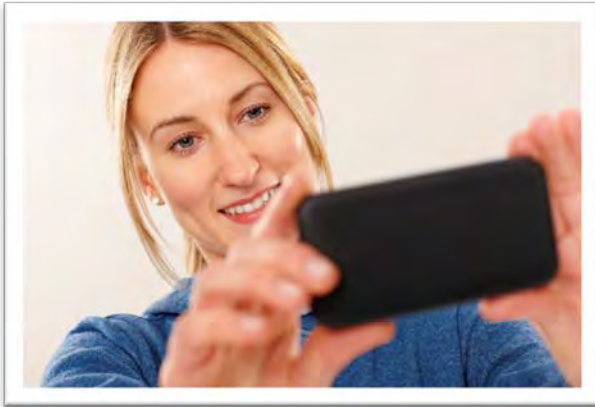
Step by step guide for getting the most out of ViewSpection!

Version 2.1

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Viewspection Underwriter User Guide



The Viewspection website is designed to give you an easy to use tool to manage your Viewspection reports.

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 or policyholders 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.viewspection.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 to toggle 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

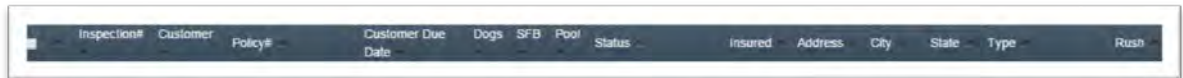
Upon logging in, you will start at "The Grid".
At the top you can also order an inspection (see page 15)



The screenshot shows the 'Viewspection' dashboard. On the left, there are search filters for 'My saved Searches', 'Ordered Date' (with 'From' and 'To' date pickers), and 'Insured Name'. The main area is a table titled 'Change View of Grid' with the following columns: Inspection#, Customer, Policy#, Customer Due Date, Dogs, SFB, Pool, Status, Insured, Address, City, State, Type, and Rush. Three rows of data are visible, each with a red status icon.

Inspection#	Customer	Policy#	Customer Due Date	Dogs	SFB	Pool	Status	Insured	Address	City	State	Type	Rush
Open VSP 1278	Test Customer	515201500	6/12/2015				Inspector Assigned	Pat Beneta	4 Main Street	Las Vegas	NV	Vendor Residential No Exterior	
Open VSP 1284	Test Customer	515201588	6/12/2015				Inspector Assigned	Ringo Starr	4 Main Street	Las Vegas	NV	Vendor Residential No Exterior	
Open VSP 1281	Test Customer	515201544	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 column names: 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
-------------	----------	---------	-------------------	------	-----	------	--------	---------	---------	------	-------	------	------


- **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

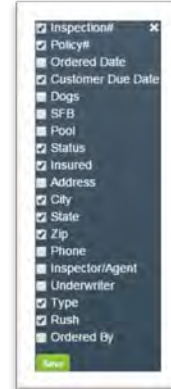


Search

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

To show only what you want or need



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 Viewspection number

Additional search fields include Search by UW, Due date, status of the Viewspection 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

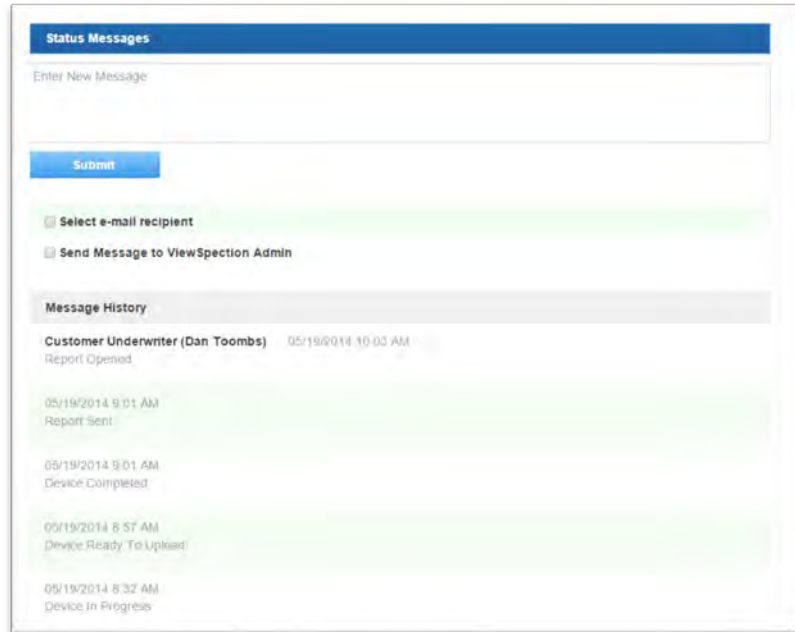
If provided by customer, building coverage info appears here.

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

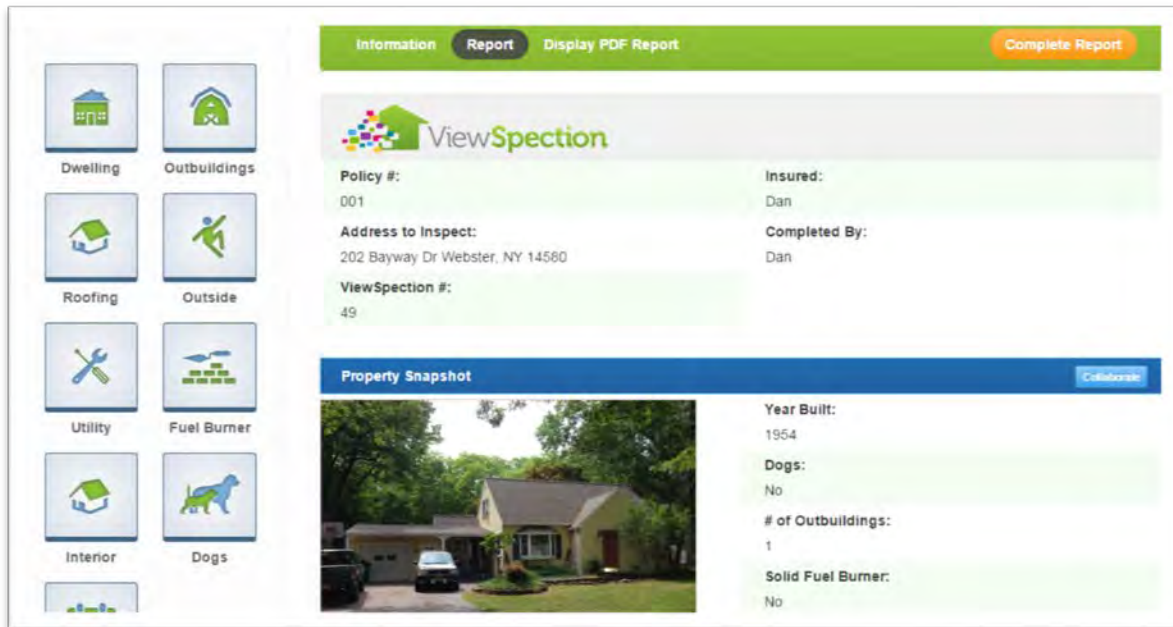
Status Messages

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.



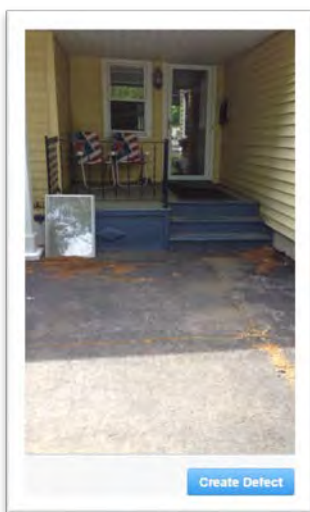
Note the Protection Icon

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



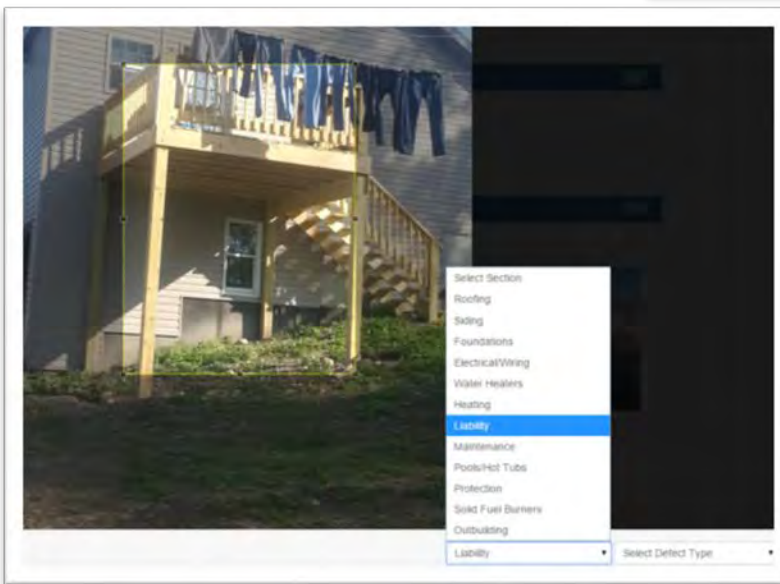
As you look through the report you notice a hazard and you want to add a recommendation simply click on the photo that shows the hazard- this will open up a new window where you can create the defect.

Click Create Defect

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



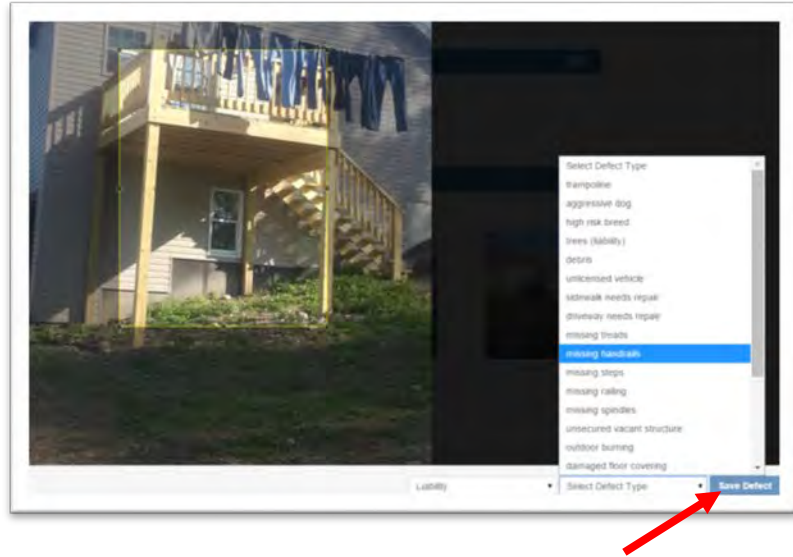
Defect Wizard



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

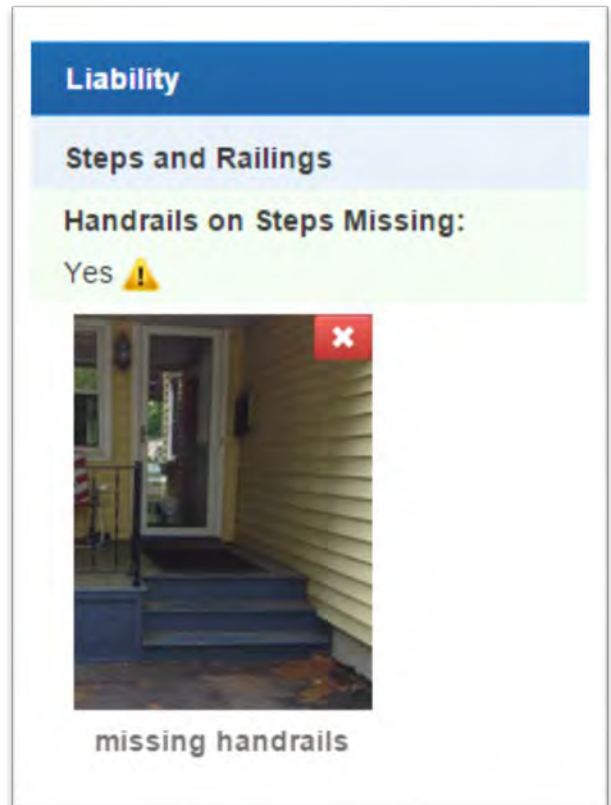


When you go back to the report you will notice that 3 things happened.

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						
Export	Defect	Rec #	Recommendation	Fields	Edit	Delete
<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						
Export	Defect	Rec #	Recommendation	Fields	Edit	Delete
		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.			

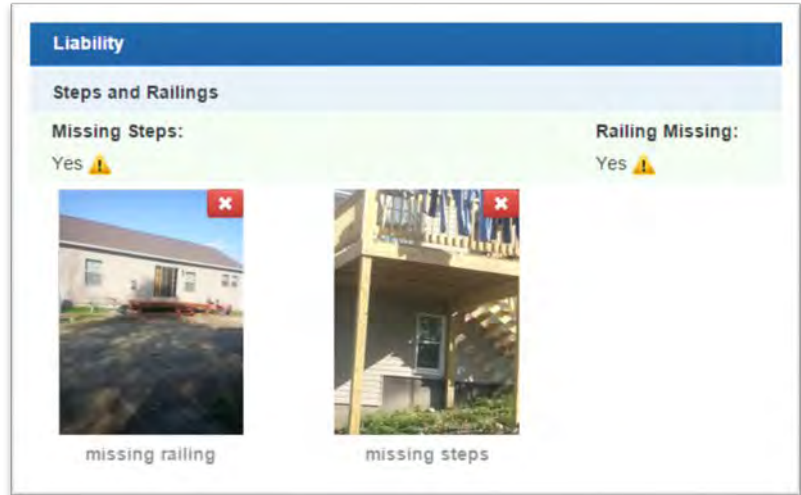
[Export Selected Recommendations](#)

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.



Evaluating Report

We at ViewSpection are always interested in providing the best product possible for our customers. Please use this tool to evaluate the report and help us to understand if this report helped you to do your job of assessing the risk at this location. Please note: If you select VSP was not helpful we will ask you to explain why so we can better understand your needs.

Information Rec Page Report Display PDF Report **Complete Report**

Comments on ViewSpection Survey (Optional)

Your comments here

Rate This Survey (Optional)

★★★★★ Accepted risk based on VSP

★★★★☆ Denied risk based on VSP

★★★★☆ Re-Classified risk based on VSP

★★★☆☆ Will not need loss control after VSP

★★☆☆☆ Still need loss control after VSP

★☆☆☆☆ VSP was not helpful

Thanks for feedback, we are always working on improvements

Complete Report **Regenerate Report File**

Returning to "The Grid"

To return to "THE GRID" click on **ViewSpecions** at the top of the main page.

Inspector/Customer	Policy#	Customer Due Date	Dogs	SFO	Pool	Status	Insured	Address	City	State	Type	Rush
Open VSP 1283 Customer	5152015CC	6/12/2015				Inspector Assigned	Pat Berets	4 Main Street	Las Vegas	NV	Residential No Exterior	
Open VSP 1284 Customer	51020150B	6/12/2015				Inspector Assigned	Ringo Star	4 Main Street	Las Vegas	NV	Residential No Exterior	
Open VSP 1283 Customer	5102015AA	6/12/2015				Inspector Device Completed	BB King	4 Main Street	Las Vegas	NV	Residential No Exterior	

Ordering and Transitioning an Inspection

Click **Order** to order an inspection.

On this screen you can order an inspection from an inspector and Vendor 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

Order Inspection

At the bottom of the page.

The screenshot shows the 'Order' screen with the following sections:

- Order ViewSpection** (header)
- New inspection or redo previous?**
 - New Inspection
 - Redo Inspection
- What type of ViewSpection?**
 - Inspector
 - Homeowner
 - Homeowner (with Vendor review)
- Vendor:**
 - Select Vendor (dropdown menu)
- What type of inspection will be?**
 - Inspection Type: Vendor Commercial (dropdown menu)

The screenshot shows a vertical menu with the following options:

- Transition Inspection** (highlighted in orange)
- Follow Up
- Add Note
- Message ViewSpection
- Message History

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.

The screenshot shows the 'Redo Inspection' screen with the following sections:

- New inspection or redo previous?**
 - New Inspection
 - Redo Inspection
- Previous Inspection:**
 - Select Inspection (dropdown menu)
- What type of ViewSpection?**
 - Inspector
 - Homeowner
 - Homeowner (with Vendor review)

Support:

For questions or technical assistance please contact:

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