



Getting Started Guide - Lender Inspector v1.4

Before you get started

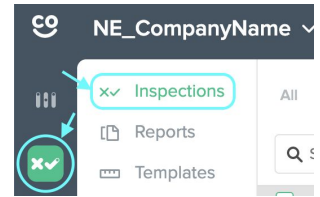
To join a Virtual Inspection as a Lender you will need to:

- Be in front of a desktop computer
- Have one of the following web browsers installed and updated to the latest version: Chrome, Firefox, or Safari
- The computer will need a way to play audio and have a microphone

How to join a Virtual Session

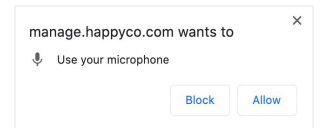
Step 1 - Finding the right inspection

- Log in to Manage at <https://manage.optigohappy.com>
- Navigate to the folder for your office or region (e.g. NE_CompanyName).
- Click the Inspections icon in the side menu.
- Select **Inspections** from the sub menu; you should see a list of inspections.
- In the list of inspections, find the one corresponding to the loan (**Tip:** You can search for the property name).



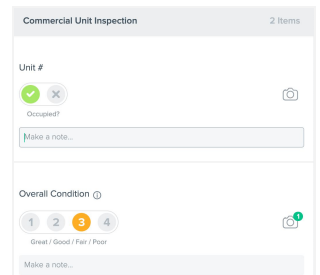
Step 2 - Joining the Virtual Session

- Once you've located the inspection, you should see a blue **Join** button in the same row as the inspection.
- If the **Join** button is not visible, it is likely the inspection is not assigned to you. You can change this by clicking on the name of the person assigned, or Unassigned if there is no one assigned, and choose yourself from the dropdown.
- At the time of the inspection, click the **Join** button to join the Virtual Session.
- Upon joining you may be prompted to give the browser access to your microphone. Click "Allow" to give access.



Step 3 - Performing the inspection

- Now that you have joined the session, you will be able to speak to and hear others on the call.
- Once the Camera Operator (the person onsite at the property) joins, you will also be able to hear them and view the video feed from their mobile device.
- Also, once the Camera Operator joins you will be able to start your inspection with the **Start Inspection** button on the right side of the screen.
- Once the inspection appears in the left side panel you will be able to scroll up and down to the relevant section and item being shown by the Camera Operator.
- From there you can rate the item, click the camera icon to take photos, and add additional notes.
- Once you are complete with the inspection, click the **Complete Inspection** button and then close the window by clicking the **X** in the top right.
- **Tip:** You can mute yourself at any point during the session using the microphone icon in the bottom left corner.



Having trouble?

If you are having trouble you can visit hpy.io/optigohappy-support or if urgent call dedicated support at **(628) 272-8050**.