ViewSpection Workflow Options

Carrier Entered – Agent Invited
- Enter the insured's info into the ViewSpection system and assign it to an Agent/Agency. The Agent has the option to complete the photo survey or to send it to the insured to complete it. Once uploaded, the report is sent to the agent, then the agent sends it to the carrier.
- Pro/Con: Makes agents more accountable. Agency may have an email for PH. Con is that agent will need to do some entry on ViewSpection platform.

Agent Entered – PH Invited
- The agent enters the insured's info into the ViewSpection system and completes the photo survey, or an automated email can be sent directly to the insured with the inspection link. Once uploaded, the report is sent to the agent, then the agent sends it to the carrier.
- Pro/Con: This is a great approach for an engaged agency that sees the value. Con is having to work on another platform-ViewSpection

Carrier URL & QR
- A dedicated URL is linked with the carrier and can be distributed via email, SMS, or displayed on a website.
- The dedicated URL can be used as a QR code and included in marketing materials.
- Pro/Con 1: Effective when used in the Agency portal at submission/POS. Con may be that the insured needs to input address and policy #
- Pro/Con 2: Can be used as a mailer with a QR code. Limiting if you do not have a PH email. Is most effective if the agent has alerted PH of the invitation.

Agency URL & QR
- A dedicated URL is linked with the agency and can be distributed via email, SMS, or displayed on a website.
- The dedicated URL can be used as a QR code and included in marketing materials.
- Pro/Con: We call it "Zero Entry Invitation". Most effective when done by CSR at point of sale (POS)

Guided
- A Virtual Desk Inspector can reach out to the insured to encourage them to use the self-service app to complete the photo survey.
- Pro/Con: Easiest way to get the highest engagement. Especially helpful when evaluating ViewSpection or with legacy systems. Does add cost to inspection.

Delivery
- Email
- PDF
- FTP
- Secure Email
- API

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