

PropertyIQ™

Insurance claims tab

INSURANCE CLAIMS TAB

VIEWING THE INSURANCE CLAIMS TAB

You can view all the Insurance claims for a Building by clicking on the Insurance Claims Tab

1. The status will default to all insurance claims for the building, but you can click on the tabs to toggle your view and view different statuses.
2. Type some key letters in any of the empty boxes on the top line to filter your view
3. Double click on any insurance claim to open the insurance claim card.
4. Click *Add* to add a new insurance claim
5. Click *View* to view an insurance claim that you have already highlighted on the screen

Building

S/Plan* 888777

Manager* Training Manager

Folio* Group Training

Building Type* Company

Building Sub Type* Residential

Building Class

Total UOE* 220

Active ☒ **All Inclusive Fees** ☐

Debt Collection ☒ **Payment Plan** ☐

Address

Street No 15 **Street Name*** Florence

Address 2

Suburb HORNSBY **State*** NSW

Building Name Hornsby Towers **P/Code** 2077

Insurance Claims

S/Plan	Building Name	Street No	Street Name	Summary	Manager	Claim #	Status	Insurer	Broker	Submitted Date	Completed Date	Date of Loss	Age
888777	Hornsby To...	15	Florence	Foyer door damaged ...	Training Ma...	5634	New	CGU Insura...					
888777	Hornsby To...	15	Florence	Water damage to celli...	Training Ma...		New	CGU Insura...	Kinnane Ins...				
888777	Hornsby To...	15	Florence	storm damage to roof	Training Ma...	43432	New	CGU Insura...	Kinnane Ins...	27/7/2017		20/6/2017	39

+ Add **View**

VIEWING OR EDITING AN INSURANCE CLAIM FROM THE INSURANCE CLAIMS TAB

You can now view or edit the insurance claim from the insurance claim tab

The screenshot displays the 'Building' form in the PropertyIQ software. The form includes fields for S/Plan (888777), Manager (Training Manager), Folio (Group Training), Building Type (Company), Building Sub Type (Residential), Building Class, Total UOE (220), Active status, Debt Collection, and Address (Street No 15, Street Name Florence, Suburb HORNSBY, Building Name Hornsby Towers, State NSW, PiCode 2077). A purple arrow points from the 'Insurance Claims' tab in the top navigation bar to the 'Insurance Claim' form below.

The 'Insurance Claim' form contains the following fields:

- Building: 888777 Hornsby Towers 15 Florence
- Lot: [empty]
- Insurance Policy: 456544
- Status: New
- Claim #: [empty]
- Claim Value: \$0.00
- Submitted Date: [empty]
- Completed Date: [empty]
- Schedule: Main Contribution Schedule
- Account: [empty]
- Date of Loss: [empty]
- GST Registered: Y

The 'Insurance Claim' form also includes a table with the following columns: Claim, Recipients, Work Orders, Notes, Documents, Alerts, and Log of Changes. The 'Claim' column is expanded, showing 'Details' and 'Claim Contact'.

S/Plan	Building Name	Street No	Street Name	Summary	Manager	Claim #	Status	Insurer	Broker	Submitted Date	Completed Date	Date of Loss	Age
888777	Hornsby To...	15	Florence	Foyer door damaged ...	Training Ma...	5634	New	CGU Insura...					
888777	Hornsby To...	15	Florence	Water damage to cell...	Training Ma...		New	CGU Insura...	Kinnane Ins...				
888777	Hornsby To...	15	Florence	storm damage to roof	Training Ma...	43432	New	CGU Insura...	Kinnane Ins...	27/7/2017		20/6/2017	39

For detailed information about insurance claims, see the manual “Insurance Claims”