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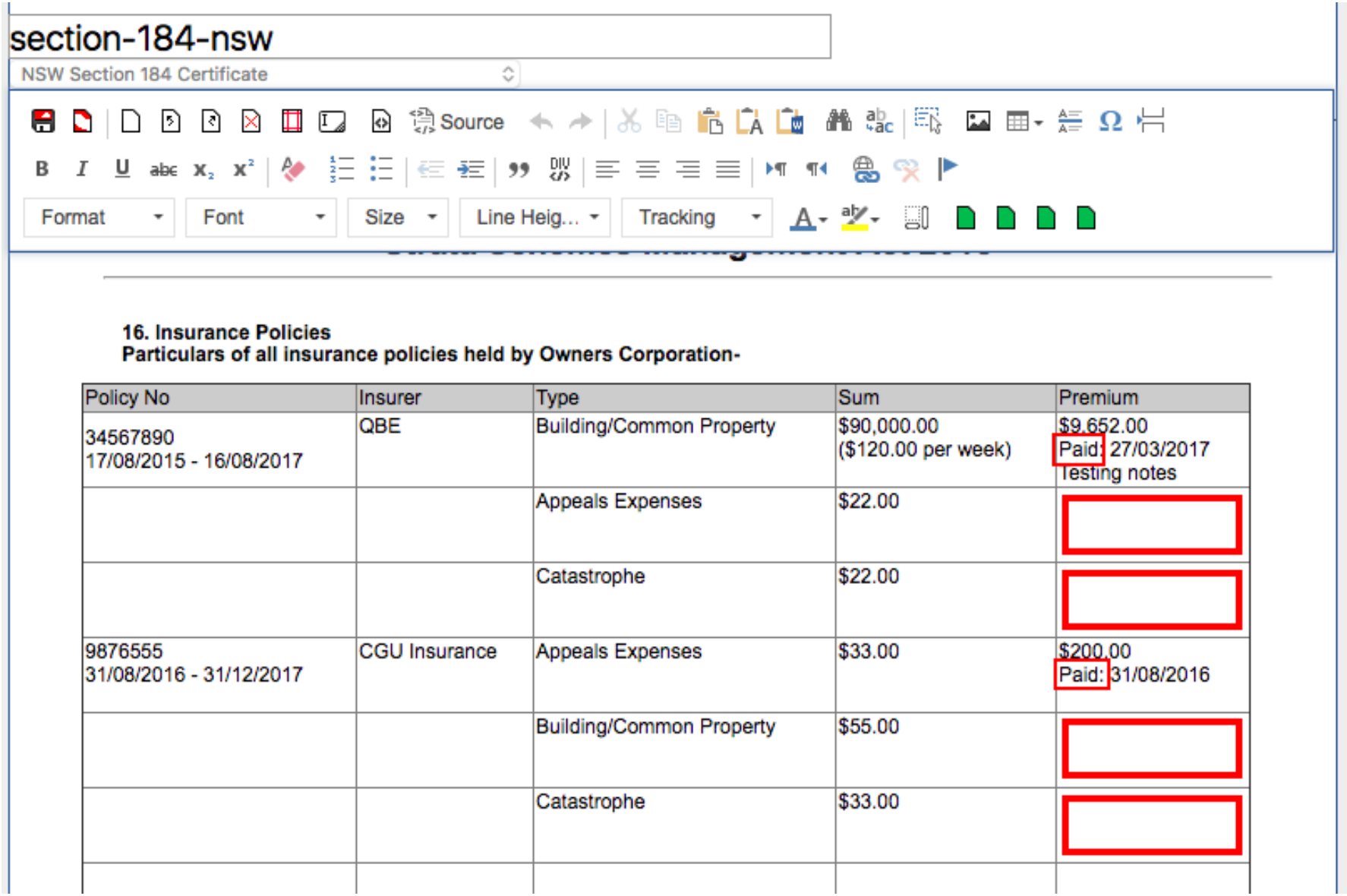
A Macquarie Bank and CoreLogic joint venture

PropertyIQ™

PropertyIQ Strata Version V0.138.2 Release Notes

Features	► We have added a New “Template Editor”- Please refer to Help Manual (Utilities> Help) ► We have added a brand New “Insurance Claim” section- Please refer to Help Manual (Utilities> Help) ► We have added a new template type - ‘Insurance Claim Notice’ with 52 Merge Fields (See Page 3 for Details)
Other	► Help Manual will now open in a new browser window instead of downloading to the system. User can access it by going to: Utilities> Help section. ► We have deleted the repeated payment dates showing on the Information Certificates for the Insurance policy section under column “Premium”. Also, added the word ‘Paid’ before payment date. (See Page 2 for details)

Deleted repeated payment date and added word ‘Paid’ before payment date.



16. Insurance Policies
Particulars of all insurance policies held by Owners Corporation-

Policy No	Insurer	Type	Sum	Premium
34567890 17/08/2015 - 16/08/2017	QBE	Building/Common Property	$90,000.00 ($120.00 per week)	$9,652.00 Paid: 27/03/2017 Testing notes
		Appeals Expenses	$22.00	
		Catastrophe	$22.00	
9876555 31/08/2016 - 31/12/2017	CGU Insurance	Appeals Expenses	$33.00	$200.00 Paid: 31/08/2016
		Building/Common Property	$55.00	
		Catastrophe	$33.00	

Insurance Claim Available Merge Fields

Go to File> Templates> “+New”

Give a desired name in the “Name” field

From “Type” dropdown, choose “Insurance Claim Notice”> Click “+Create”

User can now create desired template using below available merge fields

Merge Field	Detail flows from:
{{Building}}	File> Building> View Building> S/Plan
{{Building_Name}}	File> Building> View Building> Address> Building Name
{{Building_Street_No}}	File> Building> View Building> Address> Street No
{{Building_Street_Name}}	File> Building> View Building> Address> Street Name
{{Building_Suburb}}	File> Building> View Building> Address> Suburb
{{Building_State}}	File> Building> View Building> Address> State
{{Building_PCode}}	File> Building> View Building> Address> P/Code
{{Building_ABN}}	File> Building> View Building> Settings> Tax Settings> ABN
{{Bank_Account_Name}}	File> Building> View Building> Settings> Bank Account> Name
{{Bank_Account_BSB}}	File> Building> View Building> Settings> Bank Account> BSB
{{Bank_Account_Number}}	File> Building> View Building> Settings> Bank Account> Account No
{{Manager_Name}}	File> Building> View Building> Manager
{{Manager_Phone}}	Utilities> Security> View Manager> Contact > Ah/Bh/Mobile (Note: If Mobile no is not present then Bh no, else Ah no will be used to merge)
{{Manager_Email}}	Utilities> Security> View Manager> Contact > Email
{{GST_Status}}	File> Building> View Building> Settings> Tax Settings> GST Registered
{{Lot}}	File> Lots/Owners> View Lot> Lot
{{Owner_Name}}	File> Lots/Owners> View Lot> Owner Info> Owner Name
{{Claim_Number}}	To Do> Insurance Claim> View Claim> Claim #

{{Claim_Value}}	To Do> Insurance Claim> View Claim> Claim Value
{{Summary}}	To Do> Insurance Claim> View Claim> Claim> Details> Summary
{{Claim_Details}}	To Do> Insurance Claim> View Claim> Claim> Details> Claim Details
{{Submitted_Date}}	To Do> Insurance Claim> View Claim> Submitted Date
{{Date_Of_Loss}}	To Do> Insurance Claim> View Claim> Date Of Loss
{{Insurance_Policy}}	File> Building> View Building> Info Tab> Insurance> View Insurance> Policy Number
{{Insurance_Excess}}	File> Building> View Building> Info Tab> Insurance> View Insurance> Coverage Details> Type= Building/Common Property> Excess
{{Insurer_Name}}	File> Building> View Building> Info Tab> Insurance> View Insurance> Insurer> View Insurer> Company name
{{Insurer_Phone1}}	File> Building> View Building> Info Tab> Insurance> View Insurance> Insurer> View Insurer> Phone 1
{{Insurer_Phone2}}	File> Building> View Building> Info Tab> Insurance> View Insurance> Insurer> View Insurer> Phone 2
{{Insurer_Claims_Email}}	File> Building> View Building> Info Tab> Insurance> View Insurance> Insurer> View Insurer> Claims Email
{{Broker_Name}}	File> Building> View Building> Info Tab> Insurance> View Insurance> Broker> View Broker> Broker Name
{{Broker_Phone1}}	File> Building> View Building> Info Tab> Insurance> View Insurance> Broker> View Broker> Phone 1
{{Broker_Phone2}}	File> Building> View Building> Info Tab> Insurance> View Insurance> Broker> View Broker> Phone 2
{{Broker_Email}}	File> Building> View Building> Info Tab> Insurance> View Insurance> Broker> View Broker> Email
{{Recipient_Name}}	To Do> Insurance Claim> View Claim> Recipient Tab> Recipients (Building Manager/ Insurer/ Broker/ Committee Member etc.)

{{Recipient_Phone}}	Building Manager- Utilities> Security> View Manager> Contact > Ah/Bh/Mobile (Note: If Mobile no is not present then Bh no, else Ah no will be used to merge) Insurer- File> Building> View Building> Info Tab> Insurance> View Insurance> Insurer> View Insurer> Phone 1 Broker- File> Building> View Building> Info Tab> Insurance> View Insurance> Broker> View Broker> Phone 1 Committee Member- File> Building> View Building> Info Tab> Committee> View Committee Member> Contact Details
{{Recipient_Email}}	Building Manager- Utilities> Security> View Manager> Contact > Email Insurer- File> Building> View Building> Info Tab> Insurance> View Insurance> Insurer> View Insurer> Email Broker- File> Building> View Building> Info Tab> Insurance> View Insurance> Broker> View Broker> Email Committee Member- File> Building> View Building> Info Tab> Committee> View Committee Member> Contact Details
{{Recipient_Type}}	To Do> Insurance Claim> View Claim> Recipient Tab> Recipients (Building Manager/ Insurer/ Broker/ Committee Member etc.)
{{recipient_block_1}}	Building Manager- Utilities> Security> View Manager> Name Insurer- File> Building> View Building> Info Tab> Insurance> View Insurance> Insurer> View Insurer> Company Name Broker- File> Building> View Building> Info Tab> Insurance> View Insurance> Broker> View Broker> Broker Name Committee Member- File> Building> View Building> Info Tab> Committee> View Committee Member> Name
{{recipient_block_2}}	Building Manager- Utilities> Security> View Manager> Contact> Address Line 1 Insurer- File> Building> View Building> Info Tab> Insurance> View Insurance> Insurer> View Insurer> Address> Address Line 1 Broker- File> Building> View Building> Info Tab> Insurance> View Insurance> Broker> View Broker> Address> Address Line 1 Committee Member- File> Building> View Building> Info Tab> Committee> View Committee Member> Address> Address Line 1

{{recipient_block_3}}	Building Manager- Utilities> Security> View Manager> Contact> Address Line 2 Insurer- File> Building> View Building> Info Tab> Insurance> View Insurance> Insurer> View Insurer> Address> Address Line 2 Broker- File> Building> View Building> Info Tab> Insurance> View Insurance> Broker> View Broker> Address> Address Line 2 Committee Member- File> Building> View Building> Info Tab> Committee> View Committee Member> Address> Address Line 2
{{recipient_block_4}}	Building Manager- Utilities> Security> View Manager> Contact> Address Line 3 Insurer- File> Building> View Building> Info Tab> Insurance> View Insurance> Insurer> View Insurer> Address> Address Line 3 Broker- File> Building> View Building> Info Tab> Insurance> View Insurance> Broker> View Broker> Address> Address Line 3 Committee Member- File> Building> View Building> Info Tab> Committee> View Committee Member> Address> Address Line 3
{{recipient_block_5}}	Building Manager- Utilities> Security> View Manager> Contact> Town + Country + P/Code Insurer- File> Building> View Building> Info Tab> Insurance> View Insurance> Insurer> View Insurer> Suburb + State + P/Code Broker- File> Building> View Building> Info Tab> Insurance> View Insurance> Broker> View Broker> Suburb + State + P/Code Committee Member- File> Building> View Building> Info Tab> Committee> View Committee Member> Address> Suburb + State + Post Code
{{insurer_block_1}}	File> Building> View Building> Info Tab> Insurance> View Insurance> Insurer> View Insurer> Company Name
{{insurer_block_2}}	File> Building> View Building> Info Tab> Insurance> View Insurance> Insurer> View Insurer> Address> Address Line 1
{{insurer_block_3}}	File> Building> View Building> Info Tab> Insurance> View Insurance> Insurer> View Insurer> Address> Address Line 2
{{insurer_block_4}}	Insurer- File> Building> View Building> Info Tab> Insurance> View Insurance> Insurer> View Insurer> Address> Address Line 3

{{insurer_block_5}}	Insurer- File> Building> View Building> Info Tab> Insurance> View Insurance> Insurer> View Insurer> Suburb + State + P/Code
{{broker_block_1}}	File> Building> View Building> Info Tab> Insurance> View Insurance> Broker> View Broker> Broker Name
{{broker_block_2}}	File> Building> View Building> Info Tab> Insurance> View Insurance> Broker> View Broker> Address> Address Line 1
{{broker_block_3}}	File> Building> View Building> Info Tab> Insurance> View Insurance> Broker> View Broker> Address> Address Line 2
{{broker_block_4}}	File> Building> View Building> Info Tab> Insurance> View Insurance> Broker> View Broker> Address> Address Line 3
{{broker_block_5}}	File> Building> View Building> Info Tab> Insurance> View Insurance> Broker> View Broker> Suburb + State + P/Code

END