

# How to Setup and Use Insurance Policies in REST Professional

### Overview

You have the ability to add Insurance Policies into REST.

If an Insurance Policy is added, it attaches to the allocated property and can be accessed through the insurance tab on the property card.

You can run an Insurance Due Report and also add this insurance due report to your portfolio checker.

This Document will cover:

- How to add an Insurance Policy
- How to view the Insurance Policy on the Property Card
- How to delete an Insurance Policy

How to get the Insurance Due on the Portfolio Checker

• How to run an Insurance Due Report

#### How to add an Insurance Policy

- 1. Go to Files > Insurance Policy
- 2. Click on Add Mode-F4 and enter the details as follows:

V Insurance Policy	- • •
Policy Number ABC123-YZ ADD MODE	
Description Landlord Insurance	
General Contact Notes	
	Cancel - ESC
Property ARCH34 34 Archer Street ANNANDALE NSW 2038	
Go to property	Clear - F2
	<b>*</b>
	Delete - F3
Policy Renewal Detail	<b>_</b>
Expiry Date 01/07/2018 -	Add Mode - F4
Amount \$1,320.00	
Warning Date	Search · F7
	Ø
	Last Edits - F9
	✓
	0K · F12

- Policy Number Enter the Insurance Policy Number.
- Description Enter the Description for this insurance policy i.e. Landlord
   Insurance, Contents Insurance
- Property Enter the required Property Alpha and press Enter
- Expiry Date Enter the Expiry Date of the Insurance Policy
- Amount Enter the Amount to be paid for the Insurance Policy
- Warning Date enter the date on which you would like to be warned that the policy is due. This date is used in the Portfolio Checker and the Property Insurance Due Report.
- 3. Click on the Contact tab and enter the Insurance Company's details as follows:

😧 Insurance Poli	cy	- • •
Policy Number	ABC123-YZ ADD MODE	
Description	Landlord Insurance	
General Conta	act Notes	
Insurance Com	pany Details	Cancel - ESC
Company	GIO Insurance	
Address	PO Box 1	Clear - F2
	SYDNEY NSW 2000	*
		Delete - F3
Contact		+
Salutation		Add Mode - F4
Phone	1300 365 788	
Fax		Search - F7
Mobile		õ
Email		Last Edits - F9
Web		$\checkmark$
	ww.gio.com.au	OK - F12

- Company Enter the company name of the Insurance Company.
- Address Enter up to 30 characters for each line for the address of the Insurance Company
- Contact Name & Numbers Enter the contact name and telephone numbers
- Email Enter the email address of the contact
- Web Enter the Web Address of the Insurance Company if applicable
- 4. Click on the Notes Tab and enter required notes about this policy that you wish to record

V Insurance Policy	- • ×
Policy Number ABC123-YZ ADD MODE	
Description Landlord Insurance	
General Contact Notes	×
- Insurance policy potes	Cancel - ESC
Insurance policy notes	
^ I	Clear - F2
	*
	Delete - F3
	÷
	Add Mode - F4
	Q
	Search - F7
	õ
	Last Edits - F9
v	$\checkmark$
	OK - F12

5. Press OK-F12 to Save.

How to view the Insurance Policy on the Property Card

- 1. Go to Files > Property > Enter the Property you entered an Insurance Policy for
- 2. Click on the Insurance tab to view the listed insurance policies for this property
- 3. Double click on the required Policy or you can also highlight the Insurance Policy and click on Go to insurance policy which will direct you to the Insurance Policy Screen

🐴 Property De	tails	- • •
Alpha index Address	ARCH34 Active 34 Archer Street	
Suburb	ANNANDALE State NSW P/Code 2038	
Reminders General Fin	Gained/Lost Maintenance Inspections Information     Andvert Notes Tenants Commercial Strata Holiday Insurance Reg. Payments	×
		Cancel - ESC Action - F1
Items fo	und 1	Clear - F2
	Go to insurance policy	Add Mode - F4
	_	Replicate - F8

## How to Delete an Insurance Policy

Note: It is recommended that you print out your Property Insurance Due report prior to deleting/modifying Policies. (Reports > Property > Insurance Due)

- 1. Go to Files > Insurance Policy
- 2. Enter in the first few characters/numbers of the Policy and press Enter. You can also

click Search-F7 to locate the Insurance policy you would like to delete

😧 Ins	urance Policy			
Po	licy Number abc			
D	escription			
Ge	M Insurance Policy L	ookup		×
Р	ABC123-YZ ABC1236-XZ	Landlord Insurance Building Insurance		SC
				2
				<u>=3</u>
-Pi				- F4
	Items found: 2		<u>0</u> K	<u>C</u> ancel F7
	Warning Date	19/07/2018 💌		l
				Last Edits - F9

3. Click on Delete-F3 and the following prompt will appear:

🔽 Insurance Policy	
Policy Number ABC123-YZ	
Description Landlord Insurance	
General Contact Notes	×
34 Archer Street	Cancel - ESC
Property ARCH34 ANNANDALE NSW 2038	
Go to property	Clear - F2
	🖹 🖹
Leavenue Dullan	Delete - F3
	÷
	Add Mode - F4
Are you sure that you want to delete ABC123-Y2	
	Search - F7
Yes No	<u></u>
	Last Edits - F9
	$\checkmark$
	0K · F12

4. Select Yes and the policy will be deleted.

How to get the Insurance Due on the Portfolio Checker

- 1. Go to Files > User
- 2. Click on Search-F7 and select the Property Manager you wish to activate this for.
- Select the Login Options Tab > Tick the box Display Portfolio Check on Login if that is not already ticked, and tick Insurance. Press OK-F12 to save.



## Insurance Due Report

This report prints a list of the insurance policies due as at a specified date.

- 1. Go to Reports > Property > Property Information Report > Insurance Due
- To print the insurance policies due for the properties managed by a particular manager, choose the Manager from the dropdown list. Leave as All to print insurance policies due for all properties regardless of the manager.
- Enter in a Due Date. REST will produce a report showing insurance policies with a warning date prior to or equal to this date or select the box None to print all properties with no insurance recorded.
- Click on Print-F12 or Preview-F11 and all insurance policies up to the due date selected will print or preview as required.

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