

Search Insurance

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The instructions in this article relate to **Search Insurance**. The icon may be located on your *StrataMax Desktop* or found using the *StrataMax Search*.

Search Insurance is used to search **Insurance** policy data across all buildings in a portfolio.

This search assists with reviewing insurance policy information across the portfolio. Results can be exported to Excel and can also be saved for ongoing use as a saved search.

It is recommended to use **Search Insurance** for all global reporting of **Insurance** policies.

Searches

Many **search screens** use the same layout and tabs, even though each one reports on a different area of data. Once you understand how the search screen works, the same process can be applied across a range of searches.

Search Insurance | Security

To access Search Insurance, the user must have permission set to Allow for *Search Buildings* under the *Building* category in **Security Setup**.

Search Insurance | What it can report on

Search Insurance can report on **Insurance** policy records across the portfolio. This includes fields such as Policy Type, Sum Insured, Insurer, Due Date and Date Last Paid.

This is useful when you need to review insurance policy information across one building or many buildings, identify specific policy records, or produce a list for reporting and export.

Search Insurance | Recommended search examples

Report on insurance policies by policy type

This search can be used to review insurance policies recorded for a specific policy type.

1. Search for or select **Search Insurance**.

2. From the *Restrict To* tab, add the *Policy Type* field.
3. Select the required *Condition* and *Value*.
4. Click *Refresh* to load the results.
5. Click *Export* if the information is required in Excel or *Print* for a PDF report.

Find insurance policies by insurer

This search can assist with reporting on policies recorded against a particular insurer.

1. Search for or select **Search Insurance**.
2. From the *Restrict To* tab, add the *Insurer* field.
3. Select the required *Condition* and *Value*.
4. Click *Refresh* to display the matching policies.
5. Click *Export* if the information is required in Excel or *Print* for a PDF report.

The screenshot shows the 'Insurance' search window. At the top, there are buttons for 'Refresh', 'Export', and 'Advanced'. Below these is a search field with a dropdown menu set to 'Current Building'. A red circle with the number '1' is placed over the dropdown arrow. To the left of the search field, another red circle with the number '2' is placed over the search icon. Below the search field, it says '16 records displayed'. The main area contains a table with the following data:

Building Number	Building Name	Code	Policy Type	Sum Insured	Insurer	Policy Number	Pre
11295	SURFERS AQUARIUS	901	BUILDING	147,101,000	CHU Underwriting Ag	HU0006076866	210 ^
11295	SURFERS AQUARIUS	902	PUBLIC LIABILIT	30,000,000	CHU Underwriting Ag	HU0006076866	Incl
11295	SURFERS AQUARIUS	903	COMMON AREA	1,471,010	CHU Underwriting Ag	HU0006076866	Incl
11295	SURFERS AQUARIUS	904	LOSS OF RENT	22,065,150	CHU Underwriting Ag	HU0006076866	Incl
11295	SURFERS AQUARIUS	905	FIDELITY GUAR	250,000	CHU Underwriting Ag	HU0006076866	Incl v

At the bottom of the window, there are buttons for 'Load/Edit/Delete Search', 'Save Search', 'Save Search As', and 'Close'.

Review insurance policies by Due Date

This search can be used to report on insurance policies using the *Due Date* field. This can help ensure that any buildings due for renewal are known. This can also be added as a dashboard if preferred.

1. Search for or select **Search Insurance**.
2. From the *Restrict To* tab, add the *Due Date* field.
3. Select the required *Condition* and *Value*.
4. From the *Columns* tab, add the *Due Date* field to see date information.
5. Click *Refresh* to load the results.

Search Insurance | Commission fields

Search Insurance can also report on the *Commission Last Amount* and *Commission Last Paid* fields to show insurance commission amounts saved in **Building Information** across all buildings.

These fields are not displayed by default and can be included in the search results when needed for

reporting.