MY LOCAL BROKER

Diversifying with Allianz

Setting up the Allianz Insurance Referral (Home Loans) Email Template

1. To set up the 'Allianz Insurance Referral (Home Loans)' email template, go to Settings > External Notifications.

2. Click on the ➕ ADD NEW button near the top right corner.

3. This will open the 'Add external notification' popup window where you can select the external notification type, add Cc and Bcc recipients to your email, insert the external notification template name, subject line and write the content as per the below screenshot and template:

Type: E-Mail

Name: Allianz Insurance Referral (Home Loans) Email Template

E-Mail Subject: Allianz Insurance Referral for {contact1.nameFull}

E-Mail CC:

E-Mail BCC:

E-Mail/SMS Content:

Dear Allianz Mortgage Broker Sales Team,

Referrer Details

- Referrer Name - {deal.owner.nameFull}

- Referrer Code - ***Enter Referrer Code***

- Referrer Email - {deal.owner.email}

Customer Contact Details

- Customer Name - {contact1.nameFull}

- Preferred Contact Number - {contact1.primaryPhone}

- Preferred Contact Time - ***Enter Preferred Contact Time***

- Customer Email - {contact1.eMail}

Product Details

- Preferred Product - ***Building / Contents / Landlord***

- Building Sum Insured - ***Enter Building Sum Insured***

- Contents Sum Insured - ***Enter Contents Sum Insured***

- Security Address - {brokerTools.securityDetails.address1}

- Mortgagee - {brokerTools.preferredProduct.lender}

- Loan Purpose - {deal.loan.details.loanSplit1.loanType}

- Expected Settlement Date - {deal.expectedCloseDate}

Consent

- I have gained consent from this customer to provide their details to Allianz and for Allianz to contact them by telephone regarding its insurance products.

- I have adhered to my obligations as per the [Allianz Letter of Acknowledgement](#) and [Allianz Referral Guidelines](#).

Thank you for your assistance.

Note: The text in red needs to be manually updated before emailing the customer referral to Allianz.

4. Click on the ✓ SAVE button once finished.

Please see below knowledge base article for more information:

- [Creating and managing external notifications](#)

Your Chief Training Manager is **Santosh Mathew** who can be contacted on 03 7020 9482 or support@mylocalbroker.com.au

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Need Help? Use our LIVE chat feature

If you need assistance using Chief and want your question answered quickly please use our live chat feature built into your Chief account. This help desk feature is open Monday to Friday from 6am to 10pm AEST and Saturday from 8am to 3pm AEST. Please click on the green circle button in the bottom right hand corner of your Chief screen to get started.