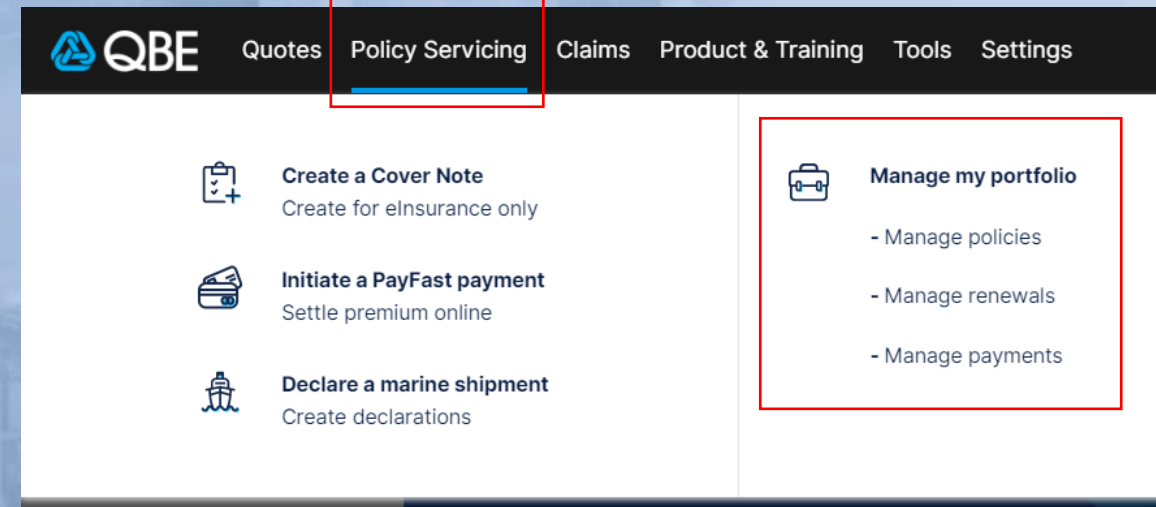


New "Manage My Portfolio" Dashboard is now available on Qnect!

Allows you to manage policies, renewals and payments at a single point with ease.



You can find the new function under "Policy Servicing" > "Manage My Portfolio" on the Qnect header toolbar



My Portfolio

Manage Policies

Manage Renewals

Manage Payments



Click here to choose the dashboard

Manage Policies/ Renewal/ Payments Tabs

You can now manage your **1. policies**, **2. renewals** and **3. payments** in "Manage My Portfolio" Dashboard by switching in between various tabs

Account number

ALL

Inception date

Expiry date

From
25/12/2020



To
25/02/2021



Advanced

Search



No data available

Try searching by account name, account number, or product type.

Remark:

We reserve the right to cancel a policy if the full premium is not received by QBE Hong Kong within 60 days after the policy transaction date.

Manage Policies

Search the policies by Account Number, Inception or Expiry Date, or using **Advanced Search** to apply more layers of filters.

Manage Policies Manage Renewals Manage Payments

Account number: 0001234 – TESTING ACCOUNT

Inception date: From 01/01/2021 To 26/02/2021

Expiry date: []

Advanced Search (See page 4)

Advanced Search

Click here for **Advanced Search** (See page 4)

View the **policy header** by clicking the policy number link here

Search Results All Pending Completed TEST Export

POLICY NO.	CUSTOMER NAME	PRODUCT TYPE	STATUS	INCEPTION DATE	EXPIRY DATE	PREMIUM	
A0635783	TEST	Domestic Helper	Endorsement Referred	17/02/2021	16/02/2022	\$450.38	No action required
A0635782	TEST	Domestic Helper	In Force	17/02/2021	16/02/2022	\$450.38	No action required
00229501	TEST	Private Motor	Renewal Quote	01/01/2021	31/12/2021	\$2,983.07	No action required
V0425714	TEST	Private Motor	Awaiting Renewal	04/02/2021	03/02/2022	\$9,071.48	No action required
B0100026	TEST	Business Insurance SME	Pending New Business	02/02/2021	01/02/2022	\$74,793.81	No action required
T0587738	TEST	Travel	In Force	17/01/2021	16/01/2022	\$1,979.68 +	Pay

1-6 of 6 (filtered from 100 total entries) Rows per page: 10

Export search result into excel

Search by **keywords** (i.e. policy no., client name, product type, status)

Click here to launch **Pay Fast** to pay for outstanding premium

Manage Policies

You can monitor your portfolio including policies, quotes and cover notes here, and filter the data by policy status, product type, inception/ expiry dates or customer name. It also shows the latest policy year premium.

Please be aware that QBE has the right to cancel any policy if the premium has been outstanding for more than 60 days.

View **Policy Status**. For the list of policy status, please see page 4.

For policy with **outstanding premium**, its premium will be shown in red icon flag

Click on the **"Pay"** button to set premium and **send payment link to customer**

Advanced Search

The Advanced Search allows you to apply additional search filters

For Personal Customer, you can search the policies by **Customer Name** or **ID Number**

For Business Customer, you can search the policies by **Business Name** or **BR Number**

Search by the types of records, such as **Cover Note, Quote, or Policy**

You can also customize the **Expiry Date Range** here

You can also customize the **Inception Date Range** here

Advanced Search

Account number: ALL

Product type: All

Type: All

Personal Business

Status: All

Inception date range Expiry date range

Date range: 2 Months

From: 25/12/2020

To: 25/02/2021

Cancel Search

- ### Search by the Policy Status:
- All
 - First Reminder
 - Second Reminder
 - Quote (Full Binding Quote)
 - Quote (Quick Quote)
 - Quote (Pending New Business)
 - Policy (In Force)
 - Policy (Lapsed)
 - Policy (Cancelled)
 - Renewal (Awaiting Renewal)
 - Renewal (Renewal Quote)
 - Renewal (Manually Reviewed)
 - Renewal (Review Required)
 - Renewal (Quote Approved Refer)
 - Renewal (Quote Referred)
 - Renewal (Pending Renewal)
 - Renewal (Pending Renewal Quote)
 - Cover Note
 - Cover Note (Endorsement)
 - Cover Note (Renewal)

 Back to "Manage Policy" Search Result

Pay Fast

Pay Fast

You can pay the outstanding premium by **credit card payment** using Past Fast.

Please note that Pay Fast is only applicable for the in-force policies but not for renewal policy.



Facilitate Customer Payments with

✓ 3 Easy Steps

- Search the Policy
- Enter Payment Amount
- Pay with Credit Card



Search

Search for the policy to be paid

Policy Number
T0587737

Verify

Product
Travel

Customer Name
TEST

Total Outstanding Premium
HKD\$3,958.87
[Hide Details ^](#)

Premium Breakdown per Policy Year
18/01/2021 to 17/01/2022 HKD \$1,979.68
18/01/2020 to 17/01/2021 HKD \$1,979.19

Payment Amount
3,958.87

Customer Email Address
testclient@abe.com
Payment confirmation will be sent to this email address

Continue

You can see the **total outstanding premium** here with the breakdown by policy year

Input the payment amount. You can either do the full or partial payment

Key in the **customer's email address** for receiving the payment confirmation





Click Continue to start payment



You can choose the payment method by either **“Pay by credit card”** or **“Send customer a payment link”**

Payment

Select a Payment Method



 

Pay by Credit Card Send Customer a Payment Link

Total Amount
HKD\$3,958.87



Payment

Select a Payment Method

Pay by Credit Card Send Customer a Payment Link

Total Amount
HKD\$3,958.87

Card Holder Name

Card Number

Expiry Date

CVV



Pay

Pay by Credit Card

Please key in the **credit card information** including the Card Holder Name, Card Number, Card Expiry Date and CVV.

Payment

Select a Payment Method

Pay by Credit Card Send Customer a Payment Link

Total Amount
HKD\$3,958.87

Payment link will be sent to your customer by email, please confirm your customer's email address

Payment Email Address
testclient@abe.com

Payment request email will be sent to this email address

Confirm and Send Now


Send Customer a Payment Link

Please input the **customer's email address** for receiving the payment link.

A payment request email will be sent to the email address provided. Please note that the **payment link will stay valid for 30 days only.**

Once payment is completed, both you and your client will receive a payment confirmation email with payment receipt. (See page 7)


The latest **payment status** can be tracked on the “Manage Payment” dashboard.

Go to Manage Payment 

Back to Menu 

A payment confirmation email with payment receipt

Intermediary Version



您的付款收據 Your Payment Receipt

[保單內容 Policy Details](#)

保單號碼 Policy Number:	V0425277
產品名稱 Product Name:	Motor
客戶姓名 Client Name:	TESTAUTO
已付保費 Premium Paid:	HKD\$1,700.00
收據編號 Receipt Number:	616984-5130426-483103001

Client Version



付款收據 Payment Receipt

[保單內容 Policy Details](#)

保單號碼 Policy Number:	V0425277
產品名稱 Product Name:	Motor
客戶姓名 Client Name:	TESTAUTO
已付保費 Premium Paid:	HKD\$1,700.00
收據編號 Receipt Number:	616984-5130426-483103001

Go to Manage Payment 

Back to Menu 

My Portfolio

Manage Policies **Manage Renewals** Manage Payments

You can also send renewal emails or download renewal notices by batch by selecting multiple policies on the list

Search policies by Account Number, Expiry Date, or using **Advanced Search** to apply more layers of filters.

Account number: 0001234 – TESTING ACCOUNT

Expiry date: From 26/02/2021 To 26/04/2021

Advanced Search (See page 9)

Advanced Search button

Click here for **Advanced Search** (See page 9)

Filter policies by **different action status**

cc me in all emails

Send multiple emails Bulk download

Search Results: All Awaiting renewal Email not sent Delivery failed

TEST

Export

Filter policies by specific **keyword**

Select policies to send multiple renewal emails/ bulk download renewal notices

POLICY NO.	CUSTOMER NAME	PRODUCT TYPE	STATUS	EXPIRY DATE	CUSTOMER EMAIL	REMARKS	DOWNLOAD	ACTIONS
V9395377	CHAN TAI MAN	Private Motor	Pending Renewal Payment	05/03/2021	testclient@abc.com Email sent on 01/03/2021		PDF	Actions
V9500181	ABC COMPANY	Private Motor	Awaiting Renewal	26/02/2021				Actions
A0603251	TESTING	Domestic Helper	In Force	26/02/2021				Actions
V9393349	TESTING	Private Motor	Awaiting Renewal	10/04/2021			PDF	Actions
V9394334	TESTING	Private Motor	Review Required	19/04/2021				Actions

Actions include Add/ Edit Email, Resend Email, Lapse policy

View the **policy header** by clicking the policy number link here

Manage Renewals
You can search the full list of expiring policies and send the renewal notice emails to your customers. For Qnect products, customers can also pay and confirm the renewal via the payment link on the email.

View **Policy Status**. For the list of policy status, please see page 4.

Click the **"PDF"** icon to download renewal notice

Advanced Search

The Advanced Search allows you to apply additional search filters

For Personal Customer, you can search the policies by **Customer Name** or **ID Number**

For Business Customer, you can search the policies by **Business Name** or **BR Number**

Advanced Search

Account number: ALL

Product type: All

Expiry date range: Date range 2 Months

From: 26/02/2021 To: 26/04/2021

Customer type: Personal Business

Search: Type customer name or ID number

Status: All - Exclude Lapsed and Cancelled

Buttons: Cancel, Search

You can also customize the **Expiry Date Range** here

- Search by the **Policy Status**:
- All
 - All - Exclude Lapsed and Cancelled
 - In Force
 - Awaiting Renewal
 - Pending Renewal Payment
 - Review Required
 - Pending Renewal
 - Manually Reviewed
 - Cancelled
 - Lapsed



Back to "Manage Renewal" Search Result

Renewal Steps for customers

Please share this Renewal Steps with your customers



Pay by Credit Card

1

Receive Renewal Email with Renewal Notice

The screenshot shows a QBE email titled "您的續保通知 Your Renewal Notice". It contains the following details:

保單號碼 Policy Number:	B0093847
產品名稱 Product Name:	Home Contents Insurance
客戶姓名 Client Name:	CHAN TAI MAN
保單到期日 Expiry Date:	30 Jun 2020
續保保費 Renewal Premium:	HKD 6,200

At the bottom, there is a button labeled "信用卡付款 Pay by Credit Card" and a link "立即確認續保 Renew Now".

2

Make instant payment with Credit Card^

The screenshot shows a payment form for "Renewal Home Contents Insurance". It includes the following fields:

- Policy number: B0093847
- Renewal Premium: HKD\$6,200
- Payment methods: VISA, Mastercard
- Email Address: chantaiman@gmail.com
- Card Holder Name: CHAN TAI MAN
- Card Number
- Expiry Date
- CVV

A "Renew Now" button is visible at the bottom of the form.

3

Renewed successfully, customer and licensed insurance intermediary will receive confirmation email

The screenshot shows a confirmation email titled "Thank You". It includes the following information:

- Policy number: B0093847
- Receipt number: T09876-0987654-0987654
- A confirmation email has been sent to: chantaiman@gmail.com

A "Close" button is located at the bottom of the email content.

^ Please pay by cheque if credit card is not available.

* If there are any changes required to the policy or enquiries, please contact your licensed insurance intermediary.

Renewal Steps for customers

Please share this Renewal Steps with your customers



Pay by **Cheque**

1

Receive Renewal Email with Renewal Notice

QBE

您的續保通知 Your Renewal Notice

保單內容 Policy Details

保單號碼 Policy Number:	B0093847
產品名稱 Product Name:	Home Contents Insurance
客戶姓名 Client Name:	CHAN TAI MAN
保單到期日 Expiry Date:	30 Jun 2020
續保保費 Renewal Premium:	HKD 6,200

[立即確認續保 Renew Now](#)

信用卡付款
Pay by Credit Card

如沒有信用卡, 請按此。 If you do not have credit card, please [click here](#).

致 CHAN TAI MAN,

感謝您對昆士蘭保險香港的支持。您的保單即將過期。您可以輕鬆快捷地於網上續保 (請點擊以上“信用卡付款”按鈕), 以繼續享有周全保障。

隨電郵附上續保相關文件以供參考。如上述保單經已續保並已繳付保費, 則無需理會此電郵。

2

Confirm to renew the Policy and pay by cheque[^]

Pay for the insurance of
Renewal Home Contents Insurance

Customers may pay the premium by Credit Card or Cheque. Please read and confirm below details if you want to renew below policy and pay by cheque.

Remarks:

- Cheque should be made payable to "QBE Hongkong & Shanghai Insurance Limited"
- Please write down "Policy Number" and "Agent Code (if any)" at the back of the cheque
- Please submit the cheque to your licensed insurance agent or mail to QBE Hongkong & Shanghai Insurance Limited: 33/F Oxford House, Taikoo Place, 979 King's Road, Quarry Bay, Hong Kong

Policy Number: <policy number>

Renewal Premium
HKD\$ 6,200

Email Address
contact@abc.com

Confirmation and Policy documents will be sent to this email address

Important:

I/We confirm that I/We understand the legal obligation to pay the renewal premium and the policy has been confirmed.

Renew Now

You licensed insurance intermediary
May Chan

6666 8888 abc@company.com

3

Renewed successfully, you and your licensed insurance intermediary will receive confirmation email

Pay for the insurance of
Renewal Home Contents Insurance

Thank You

Your insurance policy has been successfully issued.

Policy number: B0093847

Receipt Number
N/A –
Would be provided upon
successfully cheque clearance

A confirmation email has been sent to
chantaiman@gmail.com

Close

You licensed insurance intermediary
May Chan

6666 8888 abc@company.com

[^] Please pay by cheque if credit card is not available.

* If there are any changes required to the policy or enquiries, please contact your licensed insurance intermediary.

My Portfolio

Manage policies Manage renewals **Manage payments**

Inform bank transfer details to QBE Finance and find QBE bank account details.

Click here for **Advanced Search** (See page 11)



Advanced

Search

Search policies by Account Number, Status Change Date, or using **Advanced Search** to apply more layers of filters.

Account number

ALL

Status Change Date

From 03/05/2021

To 03/06/2021

Bank Transfer

Filter policies by **different status**

Search Results

All Pending Completed

Search

Filter policies by specific **keyword**

POLICY NO.	CUSTOMER NAME	OPT-IN	STATUS CHANGE DATE	DAYS IN STATUS	ONLINE STATUS	OFFLINE STATUS	Actions
H0243104	TESTING	Y	02/06/2021 17:12:18	0	B2B2C - Document Sent		Actions
V0425862	TESTAUTO	-	02/06/2021 10:56:09	0	Qnect Agent - Documents Not Sent		Actions
H0163942	CHOW NGAI HOW N	-	01/06/2021 11:00:19	1	Qnect Client - Document Sent		Actions
H0209398	YU OI KINGU OI	-	01/06/2021 10:22:41	1	Qnect Client - Document Sent		Actions

Marketing Opt-in: You may contact the customer for upselling and/or cross-selling when customer chose Y (Yes) to opt-in for marketing

You can check the **payment status** instantly here. Different types of online payments transactions are consolidated in this dashboard, including **Qnect Agent, Qnect Client, B2B2C,** and **PayFast Client**

Actions include: Pay Now/ resend payment link/ resend payment confirmation/ resend document/ resend travel SMS

Manage Payments
All online payments are now consolidated in "Manage Payment" dashboard for you to monitor the actual payment status at a single point.

Advanced Search

The Advanced Search allows you to apply additional search filters

Search by the **Policy Status:**

- All
- All
- Payment Email Sent
- Email Delivery Error
- Payment Activated
- Payment Initiated
- Payment Failed
- Payment Success
- Documents Not Sent
- Policy Issuance Failed
- Document Sent
- Agent Payment

If you have any questions, please feel free to contact your QBE Relationship Manager.

For Personal Customer, you can search the policies by **Customer Name** or **ID Number**

For Business Customer, you can search the policies by **Business Name** or **BR Number**

Advanced Search

Account number

ALL

Status

All

Status change date range

Date range: 2 Months

From: 01/01/2021

To: 01/03/2021

Personal (selected) Business

Type customer name or ID number

Cancel Search

You can also customize the **Status Change Date Range** here



Back to "Manage Payment" Search Result