


Qnect現可以支援非Qnect產品的各類交易！

除Qnect產品外，您現在亦可以透過Qnect來集中管理各種非Qnect產品的新生意報價、保單修訂、續保或取消保單之交易。

Qnect所支援的非Qnect產品交易類型：



請點擊以上的圓形圖示  了解更多！！

步驟1：選擇產品

每次報價，您可以為同一位客戶提交一種或多於一種的非Qnect商業產品新生意協商報價。

此功能不適用於續保報價。

Create Quote

Personal Insurance Commercial Insurance

Please ensure that you meet the following requirement to apply for a SME insurance policy.



Employee < 200
Number of Employees
is less than 200

Instant Quote and Bind ⓘ



Business
Insurance SME

Request for Quote ⓘ



Contractors All
Risk



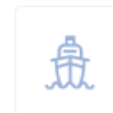
Director's and
Officer Liability



Fire



Property All Risk



Marine Cargo



Medical
Malpractice



Freight
Forwarders



Pleasure Craft



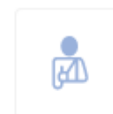
Group Personal
Accident



Professional
Indemnity



Product / Public
Liability



Employees'
Compensation

Next



按「下一步」開始報價

除電郵外，您亦可以透過Qnect向我們提交非Qnect產品的協商報價，並且在報價儀表板內集中管理所有已提交的報價。



1. 協商報價

步驟2：填寫報價詳情

您需要替每個所選的產品分別填寫報價詳情及要求。

Fire



Account Information

Hi TEST UAT2 INT, this is your account

Account Number
1234567

1. 輸入帳號

Quotation

Tell us more about the insured

Customer Name
Chan Tai Man

Search Existing Customer

2. 填寫客戶名稱。您可以搜尋現有客戶或創建新客戶

Period of Insurance
04/01/2021



to

03/01/2022



3. 填寫保險有效期

Enter all relevant details for quotation below

Please provide the quotation of the following.....

4. 輸入相關的報價詳情及詳細要求

File upload

Quotation form ([download here](#)) or any other relevant supporting documents (such as claims records). Max size per file 15MB



Add files +

Fire - Quotation Form.pdf

5. 如有需要，可上載相關的報價文件。

Next



按「下一步」確認報價



1. 協商報價

Fire



步驟3：提交報價申請


在提交報價前，請查看並確認報價的詳情及內容。

Confirm

Account selection

Account number
1234567



如有需要，可點擊編輯圖標  以修改報價詳情及內容

Customer selection

Customer name
Chan Tai Man



Fire information

Period of insurance
04/01/2021 - 03/01/2022



Quote details
Please provide the quotation of the following.....

Uploaded documents
• Fire - Quotation Form.pdf

Submit



按「提交」



1. 協商報價

步驟4：完成報價申請

提交報價申請後，您可以在此處找到報價編號及報價詳情鏈結。

QBE 核保員將跟進您所提交的報價申請。我們的核保員將通過電郵與您聯繫，以獲取其他所需資料或通知報價更新。

您也可以查看以前所提交的報價申請和其他交易請求。

您可以在此處查看報價編號。

以“GQ”為字首的參考編號泛指協商報價之申請。

Fire



Finished

Quotation Submitted

Quotation Number [GQ-HK15BE1](#) 點擊鏈結查看報價詳情

Check your previous quotation request

Quotation No.	Client Name	Product Type	Submission Date	Status	Status Change Date
GQ-HK15BE2	ABC Company	Fire	04/01/2021	Pending Quotation	04/01/2021
GR-HK15BE4	ABC Company	Fire	04/01/2021	Pending Quotation	04/01/2021
GQ-HK14Z85	Chan Tai Man	Fire	30/12/2020	Pending Quotation	30/12/2020


[View All](#) 點擊此處查看完整的報價和其他交易請求

1. 協商報價

步驟5：查閱報價詳情

通過點擊報價編號鏈結，您可以查看已提交的報價內容。

Quotation



Quotation no.: GQ-HK15BE1
Status: Pending Quotation

Product
Fire

Insured
Chan Tai Man

Period of Insurance
04/01/2021 to 03/01/2022

Submit Change

報價摘要

您可以在這裡找到報價摘要，包括報價狀態、產品、受保人名稱和保險有效期。

報價文件

如果QBE核保員已準備好報價文件，則可以在此處下載。

Quotation Documents

No document available

Correspondence

Date	Subject
04/01/2021	Quotation Request
04/01/2021	Fire - Quotation Form

提交變更

點擊此處提交對報價申請的更改。

通訊

您可以從這裡下載並查看您的報價申請、已上載的文件以及與QBE核保員的往來電郵內容。

Submit change to Underwriter


Change Details

Send to
smartqcuuathkg@qbe.com

Cc to


Subject
QBE Quotation - Fire - Chan Tai Man

Message
I'd like to make the following change in the quotation..]


File upload
 Add files +

Send

Policy Details



Policy No. F0123456
Fire (FFF)

Status ✔ In Force
Insured Period  27/01/2020 to 26/01/2021

Policy Options ^

- 1 Endorsement
- 2 Cancellation
- 3 **Renewal**
- Lapse
- New Claim

Policy Details	
Insured	Address
ABC COMPANY	XYZ BUILDING, 123 NATHAN ROAD, KOWLOON

保單選項

您可以選擇3種新的保單選項：保單修訂、取消保單和續保

點擊此處查看各選項

Documents

Transaction Type (Expand/Collapse)	Effective Date	Document Type
Renewal Issue	27/01/2020	
Renewal Issue	27/01/2019	
New Business Issue	27/01/2018	

Claims

Claim No.	Date of Submission	Risk Type	Paid Amount	Outstanding Amount	Total Incurred Amount	Status
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修訂 / 續保 / 取消保單

您現在可以在「保單詳情」頁面上修訂保單資料、續保或取消非Qnect產品的保單。

2. 保單修訂

Policy No.	Policy Type	Client Name	Address	Period of Insurance	Policy Status
F0123456	Fire	ABC COMPANY	XYZ BUILDING, 123 NATHAN ROAD, KOWLOON	27/01/2020 - 26/01/2021	✔ In Force

Endorsement Information

1. 註明保單資料修訂的生效日期

Effective Date

Effective Date
04/01/2021

2. 填寫您希望 QBE 修訂的保單資料變更

Please provide details of the changes you wish QBE to endorse

Relevant Information
Please change the address of the insured person as following....

3. 如有需要，可上載相關文件。

File Upload

Only .jpe and .pdf files. 15MB max file size.

Add files +

4. 點擊「提交」

Cancel

Submit

按此返回「保單詳情」
頁面

Confirmation

Please confirm the changes you want QBE to endorse

Effective Date
04/01/2021

Relevant Information
Please change the address of the insured person as following....

File Uploaded
No document

Cancel Confirm

5. 查看並確認申請內容

Endorsement Details Submitted

Your changes have been submitted.

Reference Number: [GE-HK15BE2](#)

Please note your request is subject to underwriting approval.

OK

6. 您的申請已轉交給核保員審核。您可以在
此處找到參考編號，以供您跟踪進度。
以“GE”為字首的參考編號泛指為保單修
訂之申請。



3. 保單續保

對於不乎合使用 one-click renewal 的非 Qnect 產品保單，您可以在此處選擇續保並進行更改或不更改續保

Confirm Renewal

If you wish to continue renewing this policy with no changes on risks or terms and conditions, select REQUEST FOR RENEWAL WITHOUT CHANGES.

Otherwise, if there are any changes required to the policy, select REQUEST FOR RENEWAL WITH CHANGES.

[Request for Renewal with Changes](#) [Request for Renewal without Changes](#)



Renew Policy with Changes

Policy No.	Policy Type	Client Name	Address	Period of Insurance	Policy Status
F0123456	Fire	ABC COMPANY	XYZ BUILDING, 123 NATHAN ROAD, KOWLOON	27/01/2020 - 26/01/2021	✔ In Force

Renewal Information

Please outline the changes you wish to make to the policy for renewal.

Relevant Information

I'd like to renew the policy with the following change....

File Upload

Only .jpe and .pdf files. 15MB max file size.



Cancel

Submit

Renew Policy without Changes

Policy No.	Policy Type	Client Name	Address	Period of Insurance	Policy Status
F0123456	Fire	ABC COMPANY	XYZ BUILDING, 123 NATHAN ROAD, KOWLOON	27/01/2020 - 26/01/2021	✔ In Force

Renewal Information

Please outline the changes you wish to make to the policy for renewal.

Relevant Information

Dear QBE, please renew this policy per the renewal terms.

File Upload

Only .jpe and .pdf files. 15MB max file size.



Cancel

Submit

- 如果選擇了“續保並進行更改”，請概述對續保保單要求的更改內容。
- 如果選擇了“不作任何更改續保”，則該保單將在不改變現有風險及條款和條件的情況下進行續保。系統將自動填充續保信息。

下一步



返回首頁



3. 保單續保

Renew Policy with Changes

Policy No.	Policy Type	Client Name	Address	Period of Insurance	Policy Status
F0123456	Fire	ABC COMPANY	XYZ BUILDING, 123 NATHAN ROAD, KOWLOON	27/01/2020 - 26/01/2021	✔ In Force

Renewal Information


Please outline the changes you wish to make to the policy for renewal.

Relevant Information
I'd like to renew the policy with the following change....

1. 概述您希望對續保單進行的更改或條件


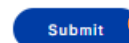
2. 如有需要，可上載相關文件

File Upload
Only .jpe and .pdf files. 15MB max file size.

 Add files +

3. 點擊「提交」

按此返回「保單詳情」
頁面


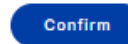
4. 查看並確認申請內容

Confirmation

Please review and confirm the changes you wish QBE to make for the policy renewal

Relevant Information
I'd like to renew the policy with the following changes:

File Uploaded
No document


 

Change Request Submitted

Your changes have been submitted.

Reference Number: [GR-HK15BE4](#)

Please note that your request is subject to underwriting approval.



5. 您的申請已轉交給核保員審核。您可以在此處找到參考編號，以供您跟踪進度。以“GR”為字首的參考編號泛指為保單續保之申請。



4. 取消保單

Cancellation

Policy No.	Policy Type	Client Name	Address	Period of Insurance	Policy Status
F0123456	Fire	ABC COMPANY	XYZ BUILDING, 123 NATHAN ROAD, KOWLOON	27/01/2020 - 26/01/2021	✔ In Force

Cancellation Request

1. 註明保單取消的生效日期

Effective Date

Effective Date
04/01/2021

2. 填寫取消保單的原因。

Please provide the rationale for your cancellation request

Relevant Information

My client want to cancel the policy because of the following reason....

3. 如有需要，可上傳相關文件

File Upload

Only .jpe and .pdf files. 15MB max file size.

Add files +

4. 點擊「提交」

Cancel

Submit

按此返回「保單詳情」
頁面

5. 查看並確認申請內容

Confirmation

Please confirm the cancellation details

Effective Date

04/01/2021

Relevant Information

My client want to cancel the policy because of the following reason...

File Uploaded

No document

Cancel

Confirm

Change Request Submitted

Your changes have been submitted.

Reference Number: [GC-HK15BE2](#)

Please note that your request is subject to underwriting approval.

OK

6. 您的申請已轉交給核保員審核。您可以在
此處找到參考編號，以供您跟踪進度。
以“GC”為字首的參考編號泛指為取消保
單之申請。

返回首頁



「一般報價」選項

您可以在此處搜索您所提交的Qnect產品之報價記錄

您可以按客戶資料、報價單號碼或產品類別來搜索報價

點擊此處看看新的報價詳情頁面

Quotation Dashboard

Standard Quotes

Negotiated Quotes

Quotation search by

Customer Quote Number Product Type

Quote Number
00239822

Search

Include Expired Quotes

Recent Records

Quote Number	Client Name	Policy Type	Status	Expires
00239822	TESTING1	Motor Vehicle Insurance (MVA)	✔ Issued	17/11/2021

1-1 of 1

「協商報價」選項

您可以在此處搜索您所提交的非Qnect產品之報價記錄和其他交易請求

點擊此處切換至「協商報價」的搜索選項

或按任何關鍵字搜索，例如客戶名稱、保單種類、狀態等。

合併報價管理

新的「報價管理」儀表板包含了Qnect產品的一般報價和非Qnect產品的協商報價，讓您輕鬆搜尋報價記錄。



點擊此處切換至
「一般報價」的搜索選項



Quotation Dashboard

Standard Quotes

Negotiated Quotes

Quotation search by

Account Number
1234567

Start Date

End Date

Search

Recent Records

All | Pending | Completed



Filter

Show 10 Entries

Escalated for processing Agent Action QBE Action

Quotation No.	Client Name	Product Type	Submission Date	Status	Status Change Date
GQ-HK15BE2	Chan Tai Man		04/01/2021		
GQ-HK15BE3	Chan Tai Man	Employees' Compensation	04/01/2021	Pending Review	04/01/2021
GQ-HK15BE4	Chan Tai Man	Property All Risk	04/01/2021	Pending Review	04/01/2021
GQ-HK15BE1	Chan Tai Man	Fire	04/01/2021	Pending Review	04/01/2021
GC-HK15BE2	ABC Company	Fire	04/01/2021	Pending Review	04/01/2021
GR-HK15BE4	ABC Company	Fire	04/01/2021	Pending Review	04/01/2021
GE-HK15BE2	ABC Company	Fire	04/01/2021	Pending Review	04/01/2021

通過點擊參考編號鏈結，您可以查看已提交的報價和其他交易請求：

- “GQ”為字首：協商報價之申請
- “GE”為字首：保單修訂之申請
- “GR”為字首：續保之申請
- “GC”為字首：取消保單之申請
- “GREF”為字首：轉介至核保員審核

您可以從這裡查閱報價/申請狀態，狀態種類包括：

- **Pending Review (待審核)** – 核保員正在審核申請。審核完成後，您將會收到電郵通知獲悉有關回應或狀態更新。
- **Pending Document Issuance (待發文件)** – 申請正在等待核保員發佈文件。
- **Policy Issued (已簽發保單)** – 申請已完成，保單已獲簽發。
- **Quotation Issued (已發出報價)** – 已發出報價。您可以從參考鏈結查看和下載報價文件。
- **Information Required (需提供資料)** – QBE核保員需要更多資料以便完成審核申請。您將收到電郵要求提供更多資料。
- **Declined by Client (客戶拒絕)** – 客戶取消了申請或拒絕了報價建議。
- **Declined by QBE (QBE拒絕)** – QBE核保員拒絕了有關申請或報價請求。請參考參考鏈結以了解拒絕原因。
- **Archived (已封存)** – 申請已過時並已封存。
- **Converted (已轉換)** – 與申請者澄清後，有關申請已轉換為其他申請類型。

協商報價搜尋頁

此搜尋頁面合併了所有涉及QBE核保員審核的協商報價申請，以及保單修訂 / 續保 / 取消保單之申請。

