

2020年6月

簡單5步

即可提升續保效率!

- 1 | 前往續保儀表板
- 2 | 查看保單
- 3 | 發送續保通知書給客戶
- 4 | 客戶確認續保
- 5 | 客戶收到續保文件



Qnect – 續保儀表板
<http://www.intermediary.qbe.asia/Insurance.html>

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步驟 1

前往續保儀表板

1.1 前往: <http://www.intermediary.qbe.asia/Insurance.html>

1. 輸入「Email Address」(電郵地址) 及「Password」(密碼)
2. 點擊「LOGIN」(登入)



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E INSURANCE

[CLICK HERE TO LOG IN](#)

Q-Tools
for Intermediaries

Email Address

Password

Remember my username

[LOGIN](#)

1

QBE Qnect

Email Address

Password

Remember my username

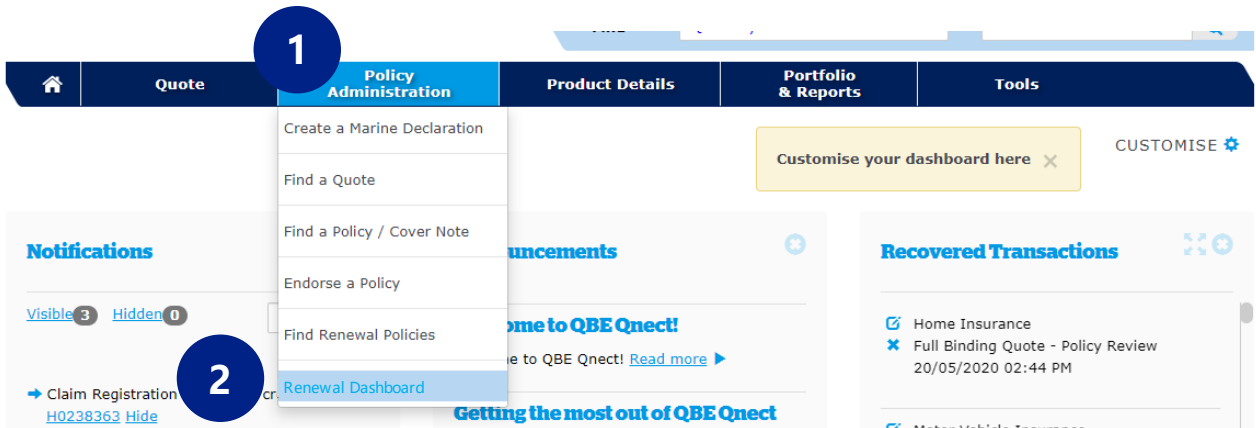
[LOGIN](#)

[Forgot Password?](#)

2

1.2 在導覽條搜尋

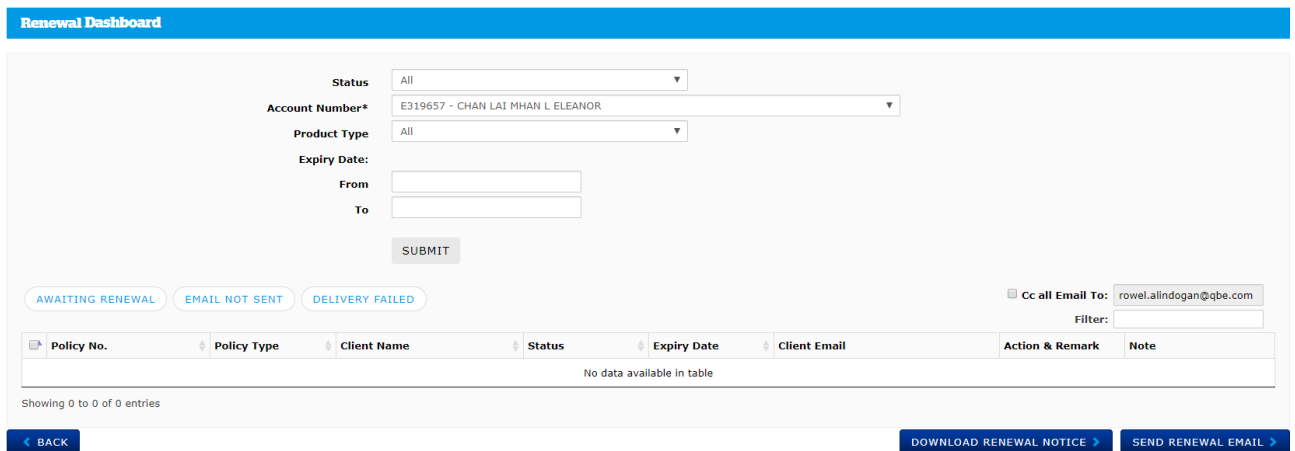
1. 前往「Policy Administration」 (保單管理)
2. 點選「Renewal Dashboard」 (續保儀表板)



The screenshot shows the top navigation bar of the QBE web application. The 'Policy Administration' menu is expanded, and the 'Renewal Dashboard' option is highlighted. A red circle with the number '1' is placed over the 'Policy Administration' menu, and another red circle with the number '2' is placed over the 'Renewal Dashboard' option.

1.3 檢閱「Renewal Dashboard」 (續保儀表板)

Home / Renewal Dashboard



The screenshot shows the 'Renewal Dashboard' interface. It includes search filters for Status (All), Account Number* (E319657 - CHAN LAI MHAN L ELEANOR), Product Type (All), and Expiry Date (From and To). Below the filters are buttons for 'AWAITING RENEWAL', 'EMAIL NOT SENT', and 'DELIVERY FAILED'. A table with columns for Policy No., Policy Type, Client Name, Status, Expiry Date, Client Email, Action & Remark, and Note is shown, but it is currently empty. At the bottom, there are buttons for 'BACK', 'DOWNLOAD RENEWAL NOTICE', and 'SEND RENEWAL EMAIL'.

步驟: 2

查看保單

2.1 搜尋最新保單

1. 選擇狀態：「All」（全部）或「Awaiting Renewal」（待續保）

保單狀態轉變：

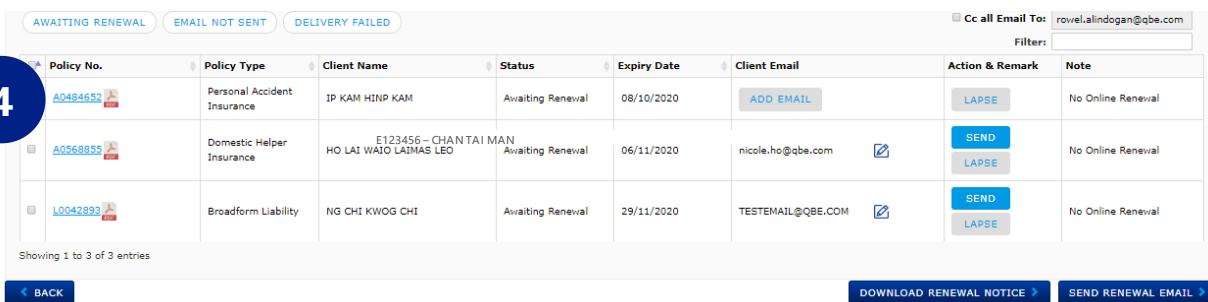
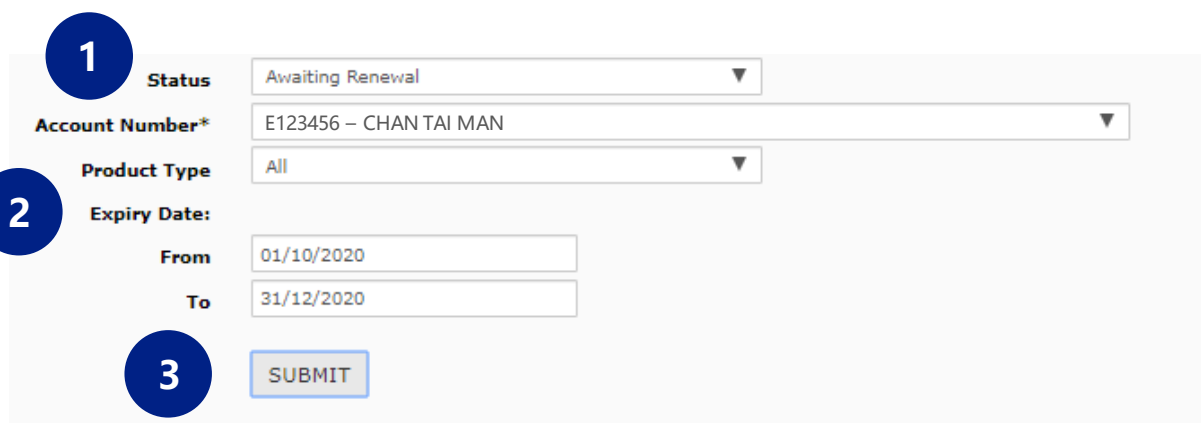
- 保單需要續保: Awaiting Renewal（待續保）
- 續保電郵及續保通知書已發送至客戶: Pending Renewal Payment（待付續保保費）
- 成功續保: In Force（生效）

2. 輸入「Expiry Date」（到期日）

（注意：您僅可查看在未來兩個月內到期的保單）

3. 點擊「SUBMIT」（提交）

4. 您可點擊保單號碼來查看保單信息

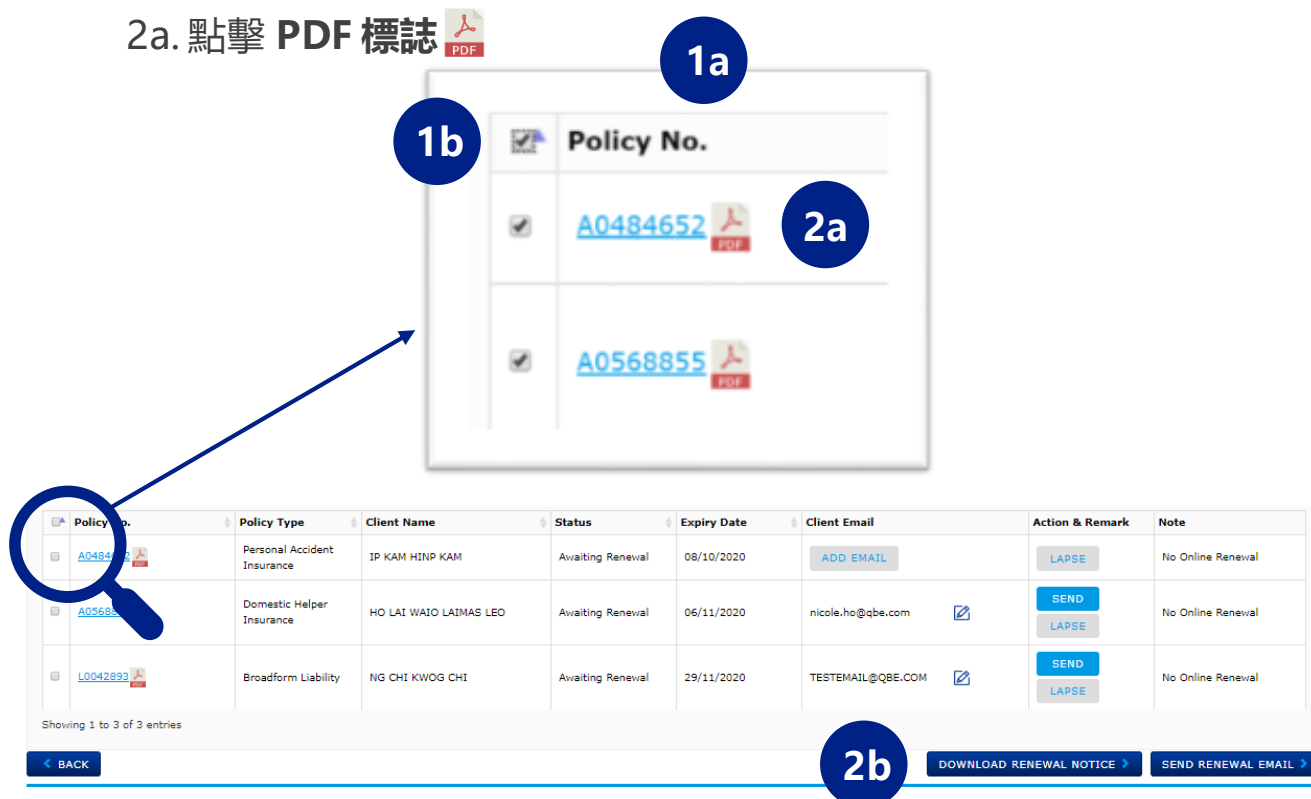


Policy No.	Policy Type	Client Name	Status	Expiry Date	Client Email	Action & Remark	Note
A0484652	Personal Accident Insurance	IP KAM HINP KAM	Awaiting Renewal	08/10/2020	ADD EMAIL	LAPSE	No Online Renewal
A0568855	Domestic Helper Insurance	E123456 - CHAN TAI MAN HO LAI WAIO LADMAS LEO	Awaiting Renewal	06/11/2020	nicole.ho@qbe.com	SEND LAPSE	No Online Renewal
L0042893	Broadform Liability	NG CHI KWOG CHI	Awaiting Renewal	29/11/2020	TESTEMAIL@QBE.COM	SEND LAPSE	No Online Renewal



2.2a 查看續保通知書 (單選)

1a. 前往「Policy No.」 (保單號碼) 一欄

2a. 點擊 PDF 標誌 



The screenshot shows a table with the following columns: Policy No., Policy Type, Client Name, Status, Expiry Date, Client Email, Action & Remark, and Note. Three rows are visible, each with a PDF icon next to the policy number. A magnified view of the 'Policy No.' column shows the following entries:

Policy No.
<input checked="" type="checkbox"/> A0484652 
<input checked="" type="checkbox"/> A0568855 

At the bottom of the page, there are buttons for 'BACK', 'DOWNLOAD RENEWAL NOTICE', and 'SEND RENEWAL EMAIL'.

2.2b 查看續保通知書 (多選下載)

1b. 點擊保單號碼旁的小方格來選擇續保通知書

2b. 前往頁面底部，點擊「**DOWNLOAD RENEWAL NOTICE**」
(下載續保通知書)

(所選續保通知書及所有相關文件將以壓縮文件形式下載)



The diagram shows a thumbs-up icon, a magnified view of the 'Policy No.' column with four rows selected (checkboxes checked), a plus sign, and a 'DOWNLOAD RENEWAL NOTICE' button. A large blue arrow points down to a folder icon representing a compressed file. A text box on the right lists the files included in the download:

所有文件都在一個文件夾內

- A0566111 - Renewal Notice
- H0573112 - Renewal Notice
- H0518613 - Renewal Notice
- A0516914 - Renewal Notice

步驟 3

發送續保通知書給客戶

3.1 添加客戶電郵地址

(電郵地址將顯示在儀表板上，若該電郵地址已儲存在Qnect)

1. 點擊「ADD EMAIL」 (添加電郵)

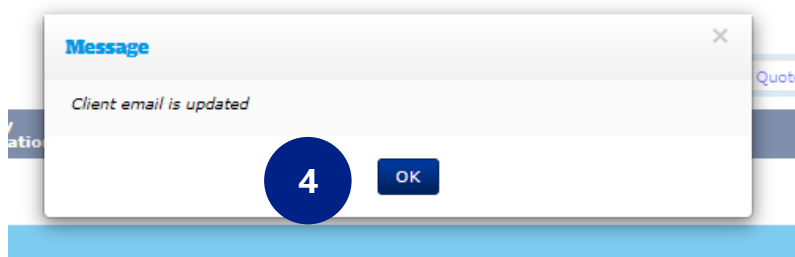
Policy No.	Policy Type	Client Name	Status	Expiry Date	Client Email	Action & Remark	Note
A0484652	Personal Accident Insurance	IP KAM HINP KAM	Awaiting Renewal	08/10/2020	tomcha	ADD EMAIL LAPSE	No Online Renewal

2. 輸入「客戶電郵」


3. 點擊「OK」

Client Email

4. 您會看到一個確認彈窗

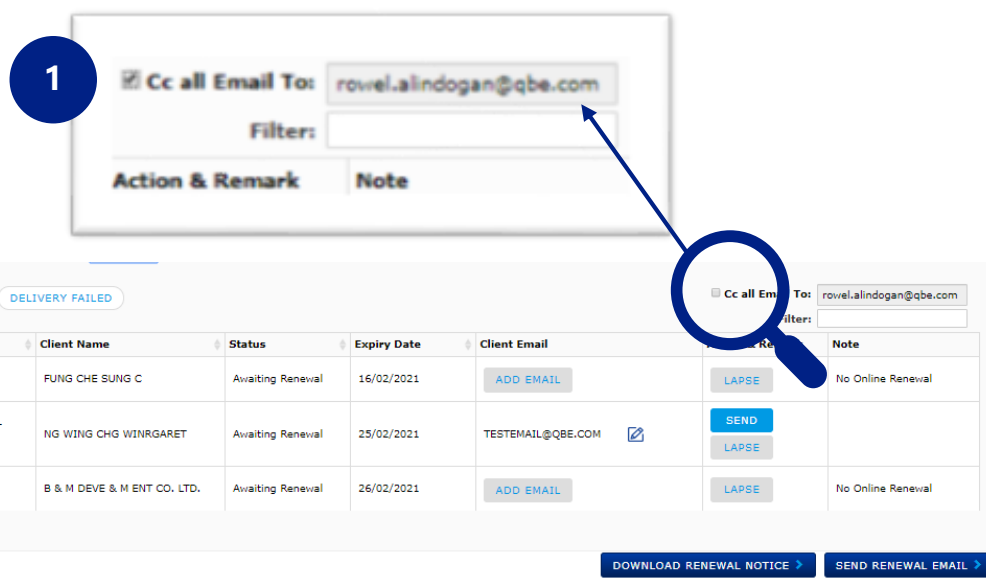


5. 如有需要，您可點擊  修改電郵地址

Policy No.	Policy Type	Client Name	Status	Expiry Date	Client Email	Action & Remark	Note
A0484652	Personal Accident Insurance	IP KAM HINP KAM	Awaiting Renewal	08/10/2020	tomcha	SEND  LAPSE	No Online Renewal

3.2 抄送續保郵件給自己

1. 若您想抄送續保郵件給自己，您可前往續保清單的右上角。您的電郵地址會被自動顯示。點擊**小方格**即可抄送給您自己。



1

Cc all Email To: rowel.alindogan@qbe.com

Filter:

Action & Remark Note

AWAITING RENEWAL EMAIL NOT SENT DELIVERY FAILED

Policy No.	Policy Type	Client Name	Status	Expiry Date	Client Email	Action & Remark	Note
B0053386	Office Pack Insurance	FUNG CHE SUNG C	Awaiting Renewal	16/02/2021	ADD EMAIL	LAPSE	No Online Renewal
A0603526	Domestic Helper Insurance	NG WING CHG WINRGARET	Awaiting Renewal	25/02/2021	TESTEMAIL@QBE.COM	SEND LAPSE	
B0091066	Office Pack Insurance	B & M DEVE & M ENT CO. LTD.	Awaiting Renewal	26/02/2021	ADD EMAIL	LAPSE	No Online Renewal

Showing 1 to 3 of 3 entries

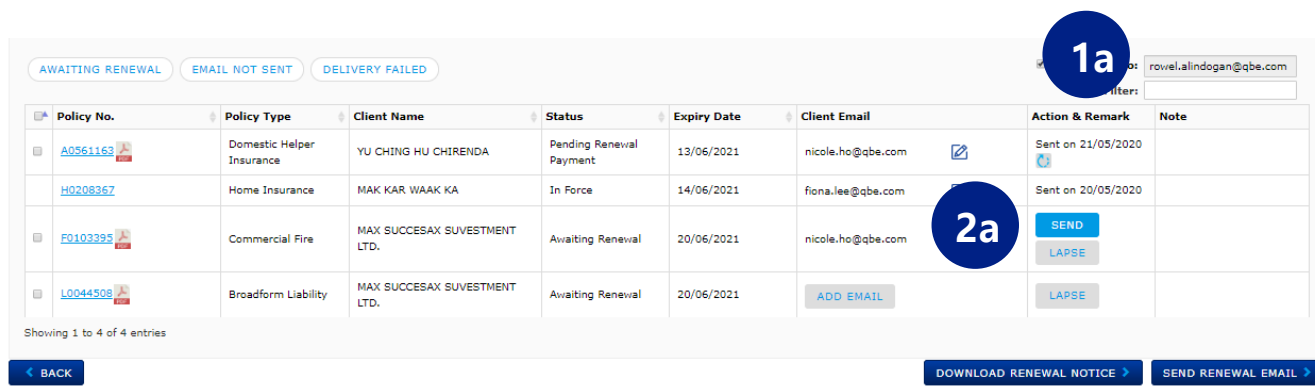
[BACK](#) [DOWNLOAD RENEWAL NOTICE](#) [SEND RENEWAL EMAIL](#)

3.3a 發送續保通知書（單選）

1a. 前往「Action & Remark」（操作及備註）

2a. 點擊 [SEND](#)

（續保通知書及所有相關文件將會發送至客戶）



1a

Cc all Email To: rowel.alindogan@qbe.com

Filter:

AWAITING RENEWAL EMAIL NOT SENT DELIVERY FAILED

Policy No.	Policy Type	Client Name	Status	Expiry Date	Client Email	Action & Remark	Note
A0561163	Domestic Helper Insurance	YU CHING HU CHIRENDA	Pending Renewal Payment	13/06/2021	nicole.ho@qbe.com	Sent on 21/05/2020	
H0208367	Home Insurance	MAK KAR WAAK KA	In Force	14/06/2021	fiona.lee@qbe.com	Sent on 20/05/2020	
F0103395	Commercial Fire	MAX SUCCESAX SUVESTMENT LTD.	Awaiting Renewal	20/06/2021	nicole.ho@qbe.com	SEND LAPSE	
L0044508	Broadform Liability	MAX SUCCESAX SUVESTMENT LTD.	Awaiting Renewal	20/06/2021	ADD EMAIL	LAPSE	

Showing 1 to 4 of 4 entries

[BACK](#) [DOWNLOAD RENEWAL NOTICE](#) [SEND RENEWAL EMAIL](#)

2a

3.3b 發送續保通知書 (多選發送)

1b. 點擊保單號碼旁的小方格來選擇續保通知書

2b. 前往頁面底部，點擊「SEND RENEWAL EMAIL」 (發送續保電郵)
(所選的續保通知書及所有相關文件會分別發送給不同客戶)

AWAITING RENEWAL
EMAIL NOT SENT
DELIVERY FAILED

Cc all Email To: rovel.lalindogan@qbe.com
 Filter:

Policy No.	Policy Type	Client Name	Status	Expiry Date	Client Email	Action & Remark	Note
<input checked="" type="checkbox"/> A0561163	Domestic Helper Insurance	YU CHING HU CHIRENDA	Pending Renewal Payment	13/06/2021	nicole.ho@qbe.com	<input type="checkbox"/>	Sent on 21/05/2020
<input type="checkbox"/> H0208367	Home Insurance	MAK KAR WAAK KA	In Force	14/06/2021	fiona.lee@qbe.com	<input type="checkbox"/>	Sent on 20/05/2020
<input checked="" type="checkbox"/> F0103395	Commercial Fire	MAX SUCCESAX SUVESTMENT LTD.	Awaiting Renewal	20/06/2021	nicole.ho@qbe.com	<input type="checkbox"/>	<div style="display: flex; gap: 5px;"> SEND LAPSE </div>
<input checked="" type="checkbox"/> L0044508	Broadform Liability	MAX SUCCESAX SUVESTMENT LTD.	Awaiting Renewal	20/06/2021	ADD EMAIL	<input type="checkbox"/>	<div style="display: flex; gap: 5px;"> LAPSE </div>

Showing 1 to 4 of 4 entries

← BACK
DOWNLOAD RENEWAL NOTICE >
SEND RENEWAL EMAIL >

1b

2b



多選發送電郵

Policy No.
<input checked="" type="checkbox"/> A0561163
<input type="checkbox"/> H0208367
<input checked="" type="checkbox"/> F0103395
<input checked="" type="checkbox"/> L0044508



SEND RENEWAL EMAIL >

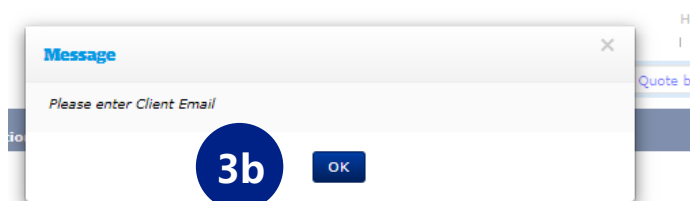


所有客戶會同時收到續保通知書

Client A
Client B
Client C
Client D
Client E

3b. 若遺漏客戶電郵地址，您會看到以下錯誤信息

- 錯誤信息：請輸入客戶電郵地址



3b


- 遺漏電郵地址一列會以黃色標註

<input checked="" type="checkbox"/> F0103395	Commercial Fire	MAX SUCCESAX SUVESTMENT LTD.	Awaiting Renewal	20/06/2021	nicole.ho@qbe.com	<input type="checkbox"/>	<div style="display: flex; gap: 5px;"> SEND LAPSE </div>
<input checked="" type="checkbox"/> L0044508	Broadform Liability	MAX SUCCESAX SUVESTMENT LTD.	Awaiting Renewal	20/06/2021	ADD EMAIL	<input type="checkbox"/>	<div style="display: flex; gap: 5px;"> LAPSE </div>



Showing 1 to 4 of 4 entries

3b

3.4 重發續保郵件

1. 發出續保郵件後，保單狀態會轉為「**Pending Renewal Payment**」（等待付款）
2. 前往「**Action & Remark**」（操作及備註）
 - 2a. 電郵發出日期會在這裡顯示
 - 2b. 如有需要，您可點擊  重發

2

Policy No.	Policy Type	Client Name	Status	Expiry Date	Client Email	Action & Remark	Note
A0561163	Domestic Helper Insurance	YU CHING HU CH	Pending Renewal Payment	13/06/2021	nicole.ho@qbe.com		Sent on 21/05/2020 

1

3.5 給保險中介人的續保電郵摘要

1. 發出續保郵件後，您會收到續保電郵摘要，當中包括：
 - a. 保單號碼
 - b. 客戶姓名及電郵
 - c. 電郵發出日期
 - d. 注意：若您的郵件無法發送，這裡會顯示「**Failed to send**」（發送錯誤）

			
續保電郵摘要 Renewal Email Summary			
a	b	c	d
保單號碼 Policy Number	客戶姓名及電郵 Client Name and Email	電郵發出日期 Email Sent Date	備註 Note
A0111222	CHAN TAI MAN tomechan@gmail.com	07 May 2020	Failed to send
H0999888	WONG WING YI wongyi@gmail.com	07 May 2020	
A0333555	LEE SHING leesing@gmail.com	07 May 2020	

步驟 4

客戶確認續保

(客戶會收到含有續保通知書的續保郵件)

共有兩類續保郵件

4.1a 含付款鏈接的郵件 (信用卡付款)

1a. 點擊「信用卡付款」



保單內容 Policy Details	
保單號碼 Policy Number:	H0111222
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 729.45

[立即確認續保 Renew Now](#)

1a 信用卡付款
Pay by Credit Card

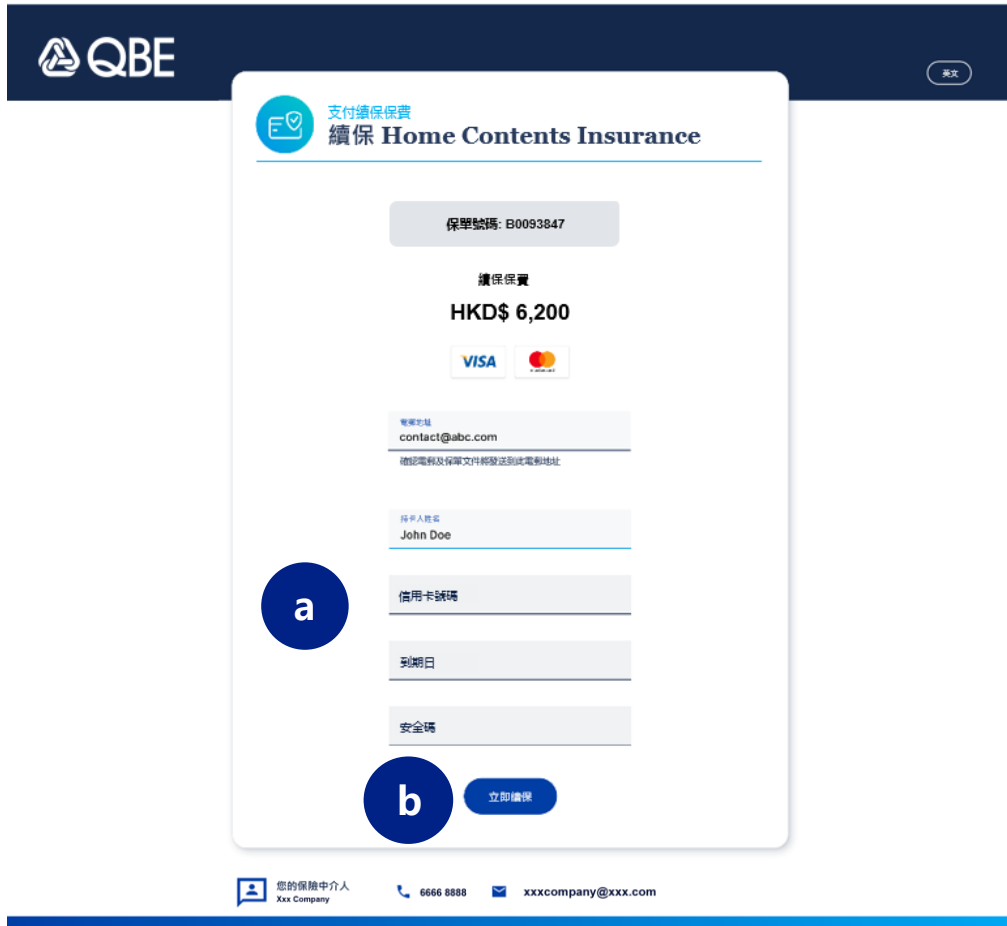
致 CHAN TAI MAN,

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。

2a: 客戶進入支付網關

- a. 輸入信用卡資料
- b. 點擊「立即續保」



QBE

支付續保保費
續保 Home Contents Insurance

保單號碼: B0093847

續保保費
HKD\$ 6,200

VISA

MasterCard

電郵地址
contact@abc.com
確認電郵及保單文件將發送到此電郵地址

持卡人姓名
John Doe

信用卡號碼

到期日

安全碼

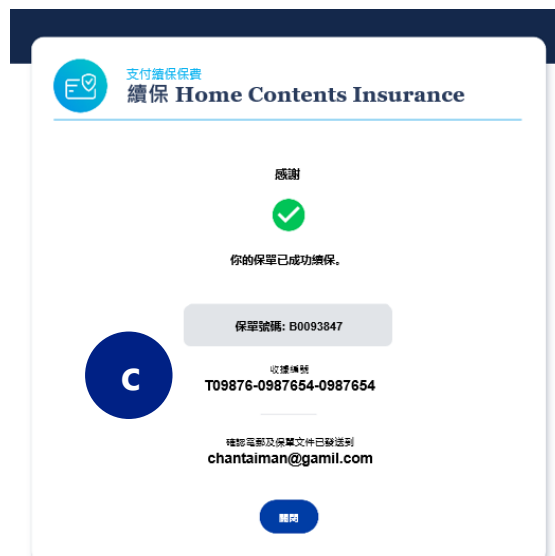
立即續保

您的保險中介人
Xxx Company

6666 8888

xxxcompany@xxx.com

c. 進入收款確認界面 (含收據編號)



支付續保保費
續保 Home Contents Insurance

感謝

✓

你的保單已成功續保。

保單號碼: B0093847

收據編號
T09876-0987654-0987654

確認電郵及保單文件已發送到
chantaiman@gamil.com

關閉

4.2 不含付款鏈接的郵件

1. 客戶需要聯繫保險中介人進行續保



2. 保險中介人需按照目前流程與昆士蘭保險（香港）確認續保內容



您的續保通知 Your Renewal Notice

保單內容 Policy Details

保單號碼 **Policy Number:** H0111222

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 729.45

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。請聯絡您的保險中介人確認續保，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。

如有任何疑問，請聯絡您的保險中介人。

Dear CHAN TAI MAN,

Your policy will expire soon. To stay protected, you can renew the policy by

4.3 如何知道哪張保單無法進行網上續保？

1. 前往「Renewal Dashboard」（續保儀表板）
2. 前往「Note」（注意）一欄
3. 顯示「No Online Renewal」（不能進行網上續保）

1

Home / Renewal Dashboard

Renewal Dashboard

Status Awaiting Renewal

Account Number* E319657 - CHAN LAI MHAN L ELEANOR

Product Type All

Expiry Date:

From 01/10/2020

To 31/12/2020

Cc all Email To: rowe...@qbe.com

Filter:

AWAITING RENEWAL
EMAIL NOT SENT
DELIVERY FAILED

Policy No.	Policy Type	Client Name	Status	Expiry Date	Client Email	Action & Remark	Note
A0484652	Personal Accident Insurance	IP KAM HINP KAM	Awaiting Renewal	08/10/2020	ADD EMAIL	<input type="button" value="LAPSE"/>	No Online Renewal
A0568855	Domestic Helper Insurance	HO LAI WAIO LAIMAS LEO	Awaiting Renewal	06/11/2020	nicole.ho@qbe.com <input type="checkbox"/>	<input type="button" value="SEND"/> <input type="button" value="LAPSE"/>	No Online Renewal
L0042893	Broadform Liability	ING CHI KWOG CHI	Awaiting Renewal	29/11/2020	TESTEMAIL@QBE.COM <input type="checkbox"/>	<input type="button" value="SEND"/> <input type="button" value="LAPSE"/>	No Online Renewal

Showing 1 to 3 of 3 entries

步驟 5



客戶收到續保文件

(客戶及保險中介人都會收到確認電郵及續保文件)

共有兩類確認電郵

5.1 Qnect 產品 (個人保險)

a. 接收確認電郵

(當客戶收到確認電郵後，續保文件會在5分鐘以內發出)

給保險中介人的確認電郵
(Qnect產品)

給客戶的確認電郵
(Qnect產品)

QBE

續保確認 Renewal Confirmation

保單內容 Policy Details

保單號碼 Policy Number :	H0111222
產品名稱 Product Name :	Home Contents Insurance
客戶姓名 Client Name:	CHAN TAI MAN
受保期 Period of Insurance:	30 Jun 2020 – 29 Jun 2021
已付金額 Payment Amount:	HKD 729.45
收據編號 Receipt Number:	H0111222-21042020-090807

致 <Agent Name>,
以上保單已成功續保。保單文件將稍後電郵至客戶。
如有任何疑問，請聯絡您的關係經理。

Dear <Agent Name>,
The above policy has been successfully renewed. Policy documents will be sent to the client separately.
If you have any enquiries, please contact your designated Relationship Manager.

QBE

您的續保確認 Your Renewal Confirmation

保單內容 Policy Details

保單號碼 Policy Number :	H0111222
產品名稱 Product Name :	Home Contents Insurance
客戶姓名 Client Name:	CHAN TAI MAN
受保期 Period of Insurance:	30 Jun 2020 – 29 Jun 2021
已付金額 Payment Amount:	HKD 729.45
收據編號 Receipt Number:	B0020693-21042020-090807

致 <Client Name>,
感謝您選用昆士蘭保險香港。您的保單已成功續保。
保單文件將稍後隨另一電郵附上。
如對保障範圍、承保表及保單有任何疑問，請聯絡您的保險中介人。

Dear <Client Name>,
Thank you for insuring with QBE Hong Kong. Your policy has been successfully renewed.

b. 客戶接收續保文件

(在郵件附件中下載)



您的續保文件 Your Renewal Documents

保單內容 Policy Details

保單號碼 Policy Number:	H0111222
產品名稱 Product Name:	Home Contents Insurance
客戶姓名 Client Name:	CHAN TAI MAN
受保期 Period of Insurance:	30 Jun 2020 – 29 Jun 2021
已付金額 Payment Amount:	HKD 729.45
收據編號 Receipt Number:	H0111222-21042020-090807

致 CHAN TAI MAN,

感謝您選用昆士蘭保險香港。

隨電郵附上保單文件以供參考，您亦可下載及詳閱保單。

如對保障範圍、承保表及保單有任何疑問，請聯絡您的保險中介人。

Dear CHAN TAI MAN,

Thank you for insuring with QBE Hong Kong.

Your Policy documents are attached for your reference. We advise that

5.2 Qnect BIZ 及SME 及非Qnect產品

a. Qnect BIZ 及SME



當續保文件準備好後，將會上載至Qnect。

b. 非Qnect產品



當續保文件準備好後，將會以電郵通知您。



昆士蘭保險（香港）感謝您的支持！

如有任何查詢，請聯絡您的關係經理。