Qnect

Renewal Dashboard

Jun 2020

QBE

5 Easy Steps

To Increase Your Renewal Efficiency

1. Go To Renewal Dashboard
2. View Renewal Policies
3. Send Out Renewal Email To Clients
4. Client Confirm To Renew
5. Client Receive Renewal Documents

Qnect – Renewal Dashboard
http://www.intermediary.qbe.asia/Insurance.html

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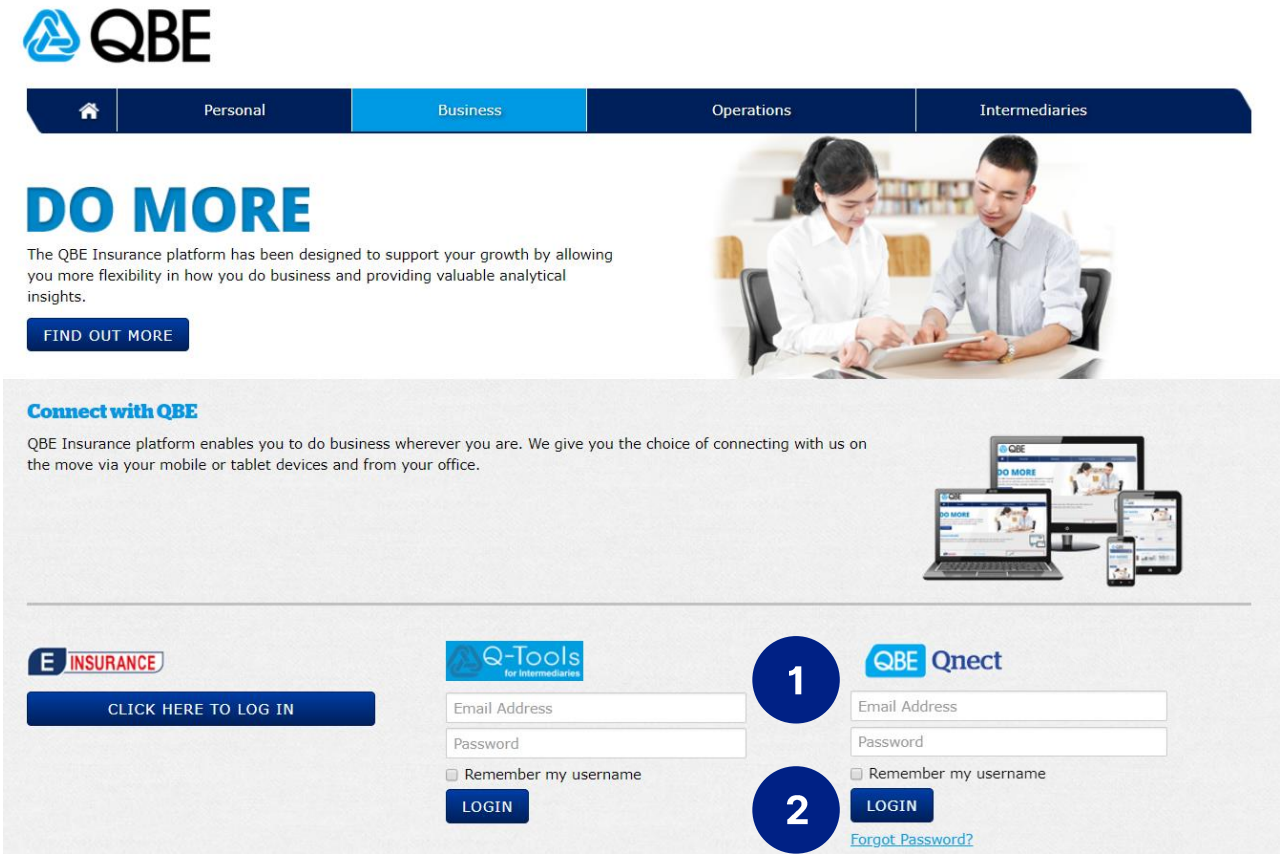
Step: 1

Go To Renewal Dashboard

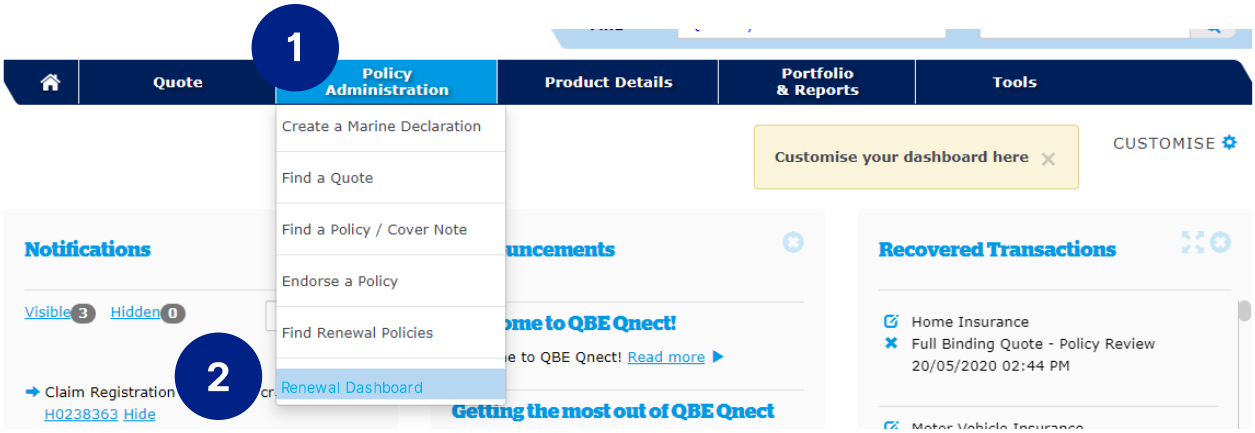
1.1 Login to Qnect: http://www.intermediary.qbe.asia/Insurance.html

1. Enter **'Email Address'** and **'Password'**
2. Click **'LOGIN'** button

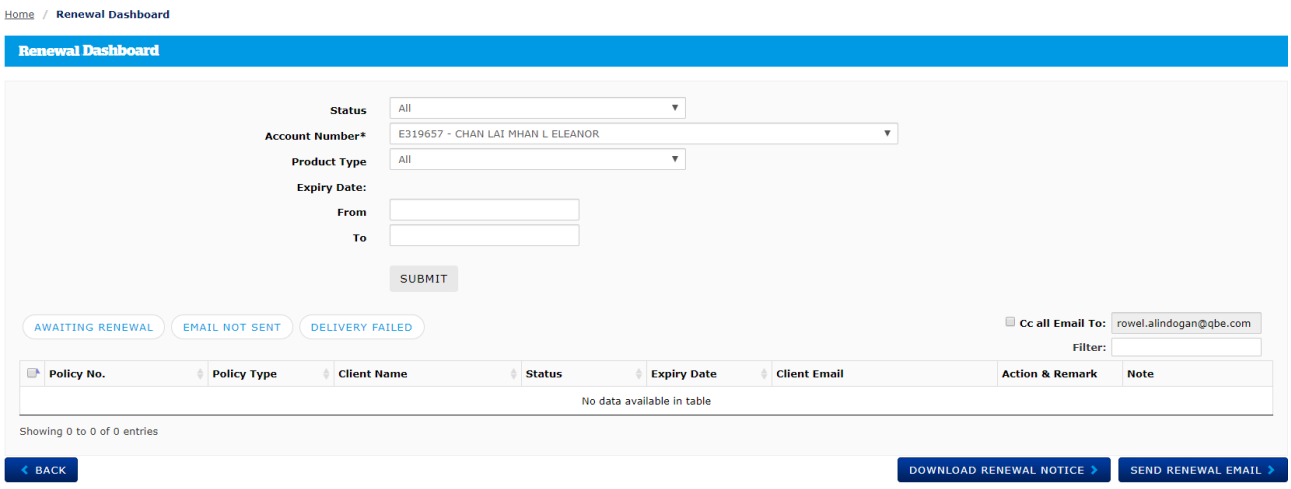


1.2 Search From Navigation Bar

1. Go to **'Policy Administration'** tap
2. Select **'Renewal Dashboard'**



1.3 View Renewal Dashboard



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Step: 2

View Renewal Policies

2.1 Search latest renewal policies

1. Select **Status: 'All'** or **'Awaiting Renewal'**

   Policy Status changes:

   i. Policy need to renew: Awaiting Renewal

   ii. Renewal Email and Renewal Notice sent out to client: Pending Renewal Payment

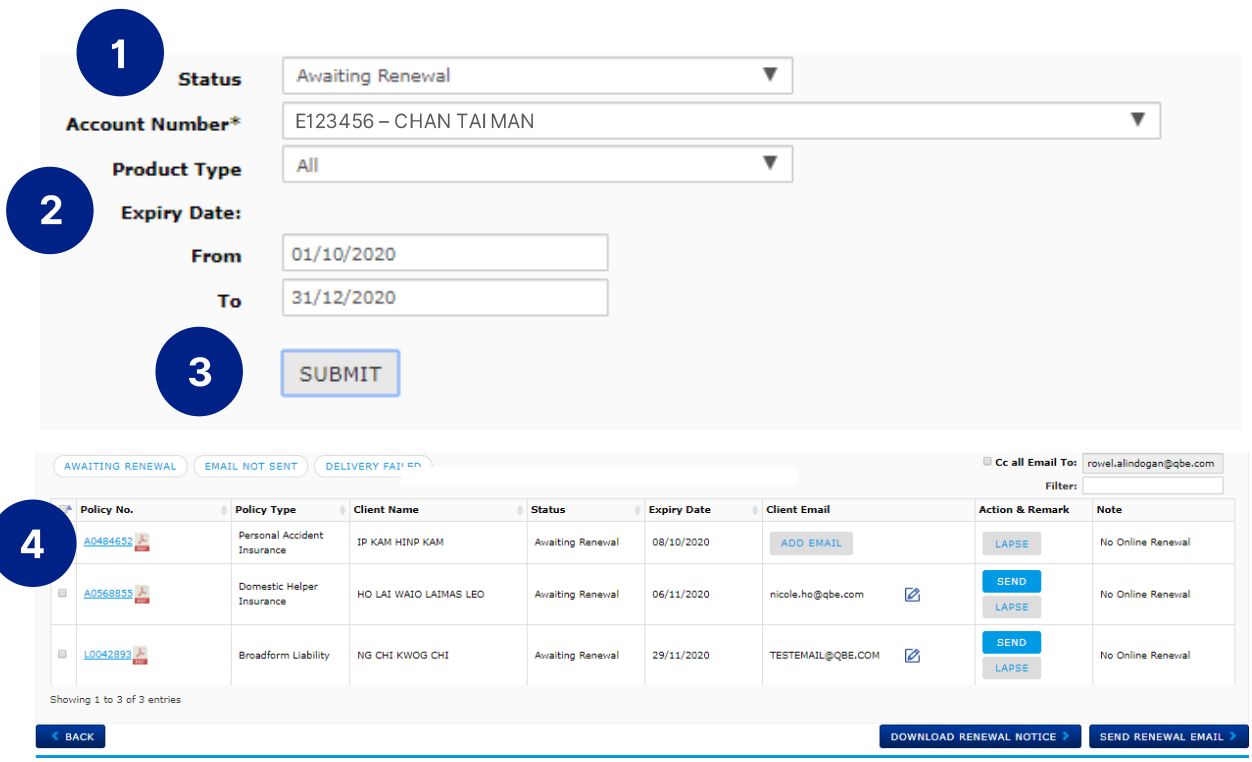
   iii. Renewed policy: In Force

2. Enter **'Expiry Date'**

   (Note: the renewal notice is only available for policy which will be expired in coming 2 months)

3. Click **'SUBMIT'** button

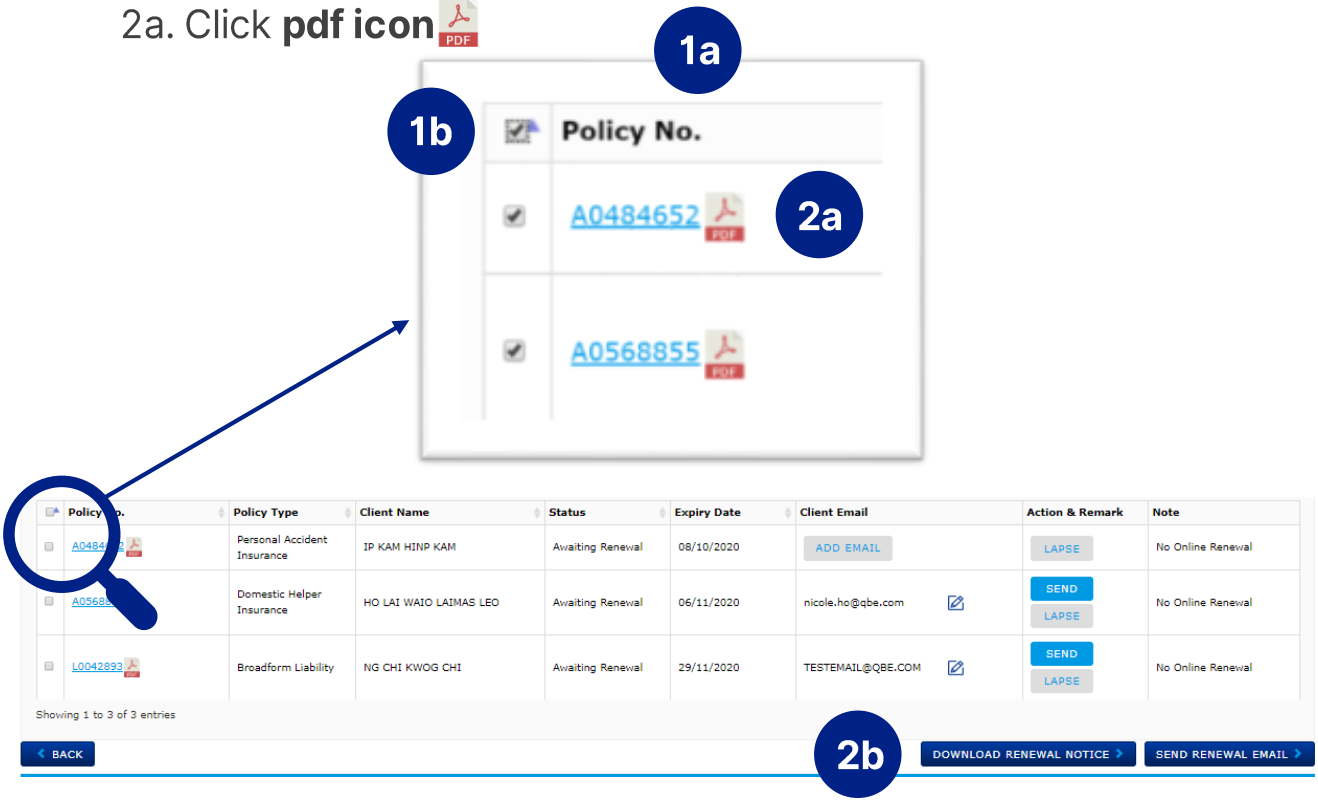
4. You may check the policy details by clicking the **policy no.**



2.2a View Renewal Notice (Individually)

1a. Go to **'Policy No.'** column

2a. Click **pdf icon**



2.2b View Renewal Notice (Bulk Download)

1b. Select renewal notices by **clicking the box** next to the policy no.

2b. Go to the page bottom, click **'DOWNLOAD RENEWAL NOTICE'**

(Selected renewal notices and all related documents will be downloaded to your computer in a zip file)

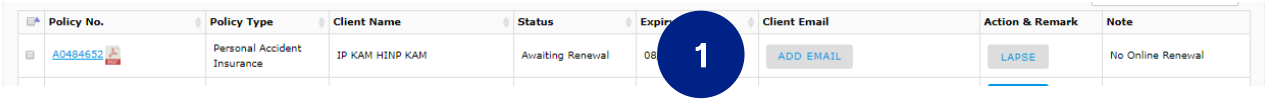
Step: 3

Send Out Renewal Email To Clients

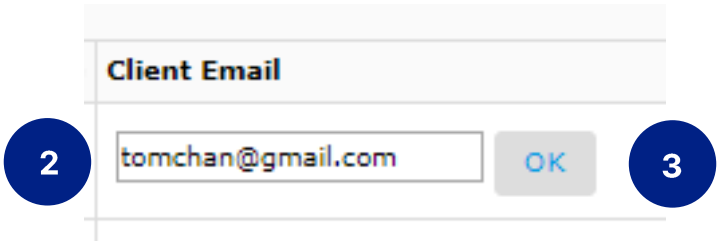
3.1 Add Client Email

(Those client email will be displayed on the dashboard if they are already saved in Qnect system)

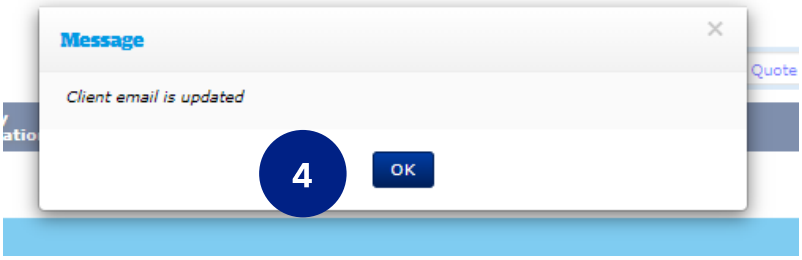
1. Click '**ADD EMAIL**' button



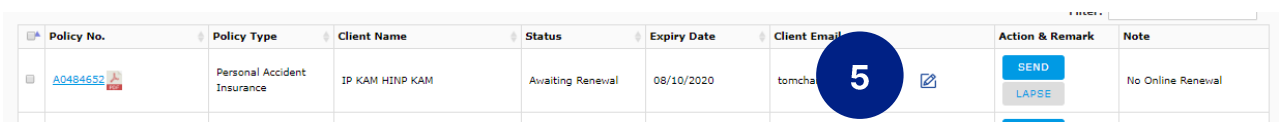
2. Enter **Client Email address**
3. Click **'OK'** button



4. There will be a confirmation box

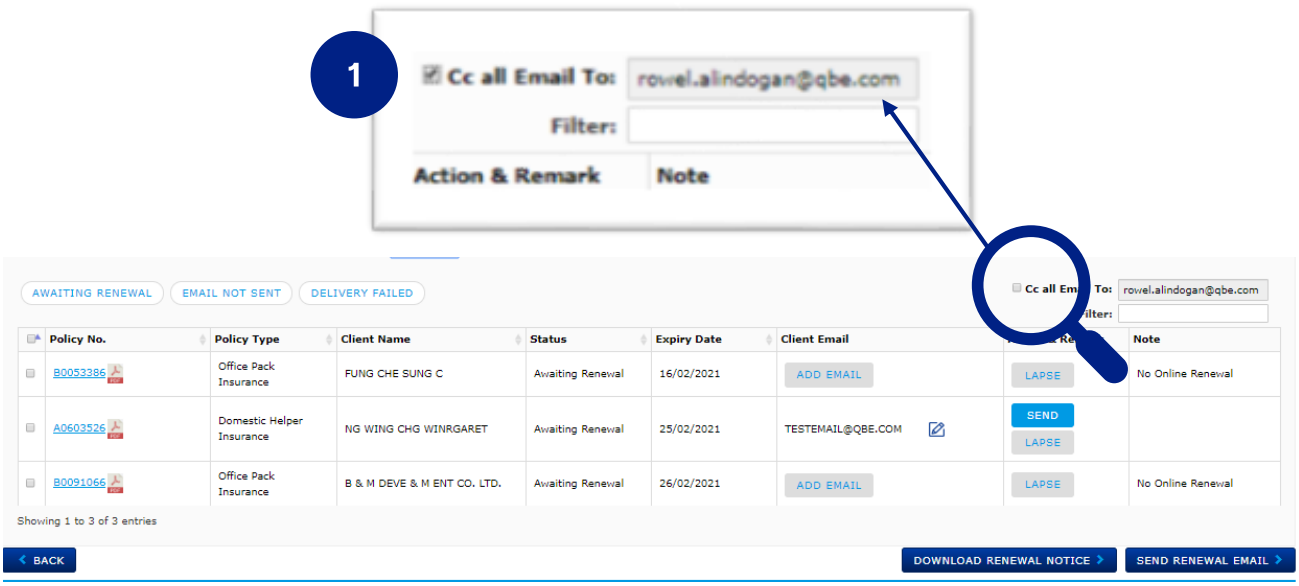


5. Click to edit the email (if needed)



3.2 CC Renewal Email To Myself

1. At the top right-hand side of the result table, there is a **box** for turning on the cc function. Your Qnect login email address will be displayed on here automatically. Please **select the box** if you want the renewal email cc to yourself.

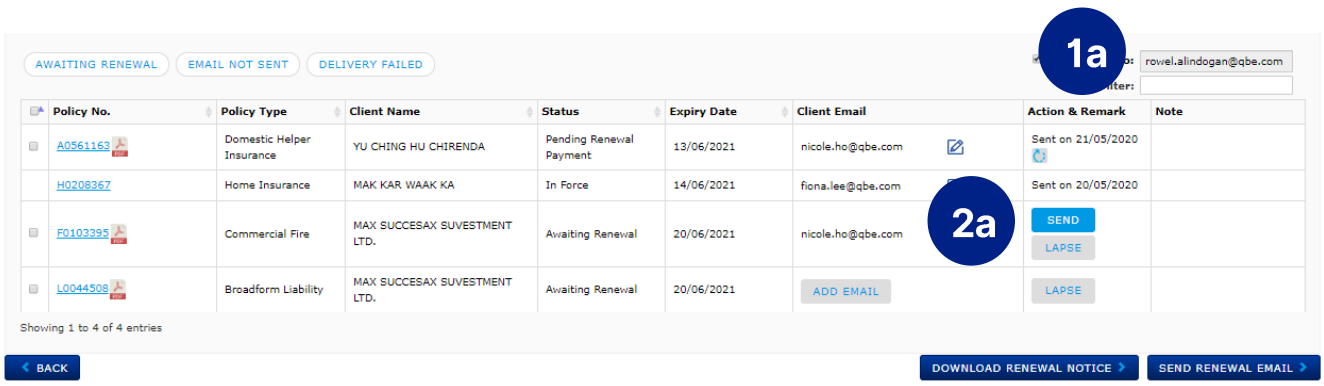


3.3a Send Out Renewal Email (Individually)

1a. Go to **'Action & Remark'** column

2a. Click SEND button

(Renewal Notice and all related documents will be sent to the client.)

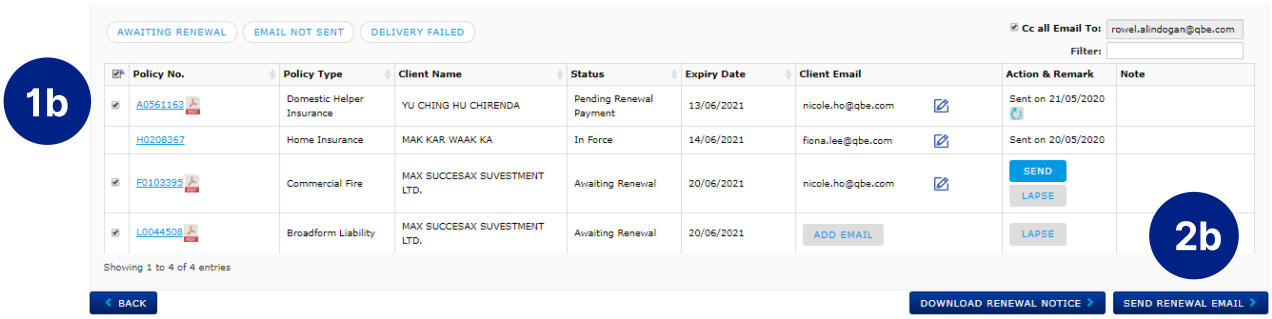


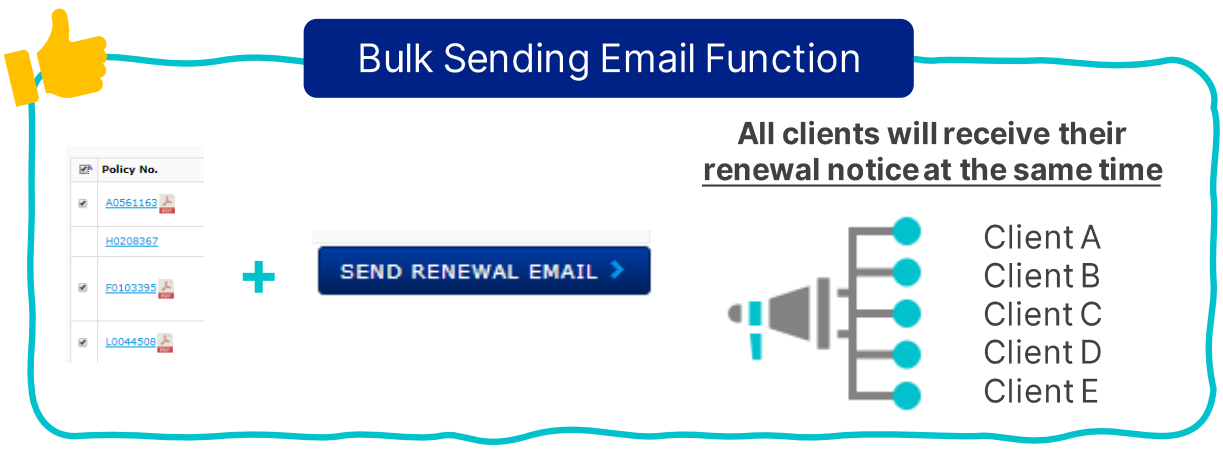
3.3b Send Out Renewal Email (Bulk Sending renewal email)

1b. Select renewal notices by **clicking the box** next to the policy no.

2b. Go to the page bottom, click **'SEND RENEWAL EMAIL'**

(Selected renewal notices and all related documents will be sent to individual customer)

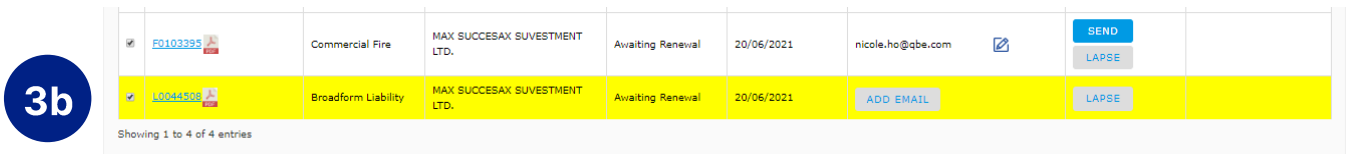




3b. Error message if there is a missing client email

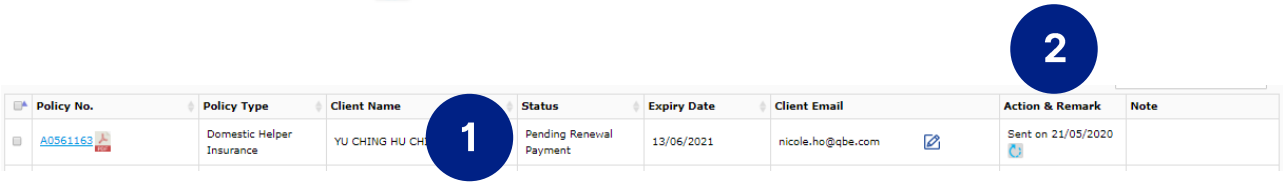
- Error message: Please enter Client Email

- Those missing client email rows will be highlighted in yellow



3.4 Resend Renewal Email

1. After sending out renewal email, the policy status will be changed to **'Pending Renewal Payment'**
2. From **'Action & Remark'** column
   2a. Email sent out date will be displayed here
   2b. Click to resend the renewal email (if needed)



3.5 Renewal Email Summary For Intermediary

1. After sending out renewal email, you will receive an **'Renewal Email Summery'**.
   a. Policy Number
   b. Client Name and Email
   c. Email Sent Date
   d. Note : We will inform you if the email was **'Failed to send'**

Step: 4

Client Confirm To Renew

(Client will receive the renewal email with Renewal Notice)

There are two types of Renewal Emails for different products

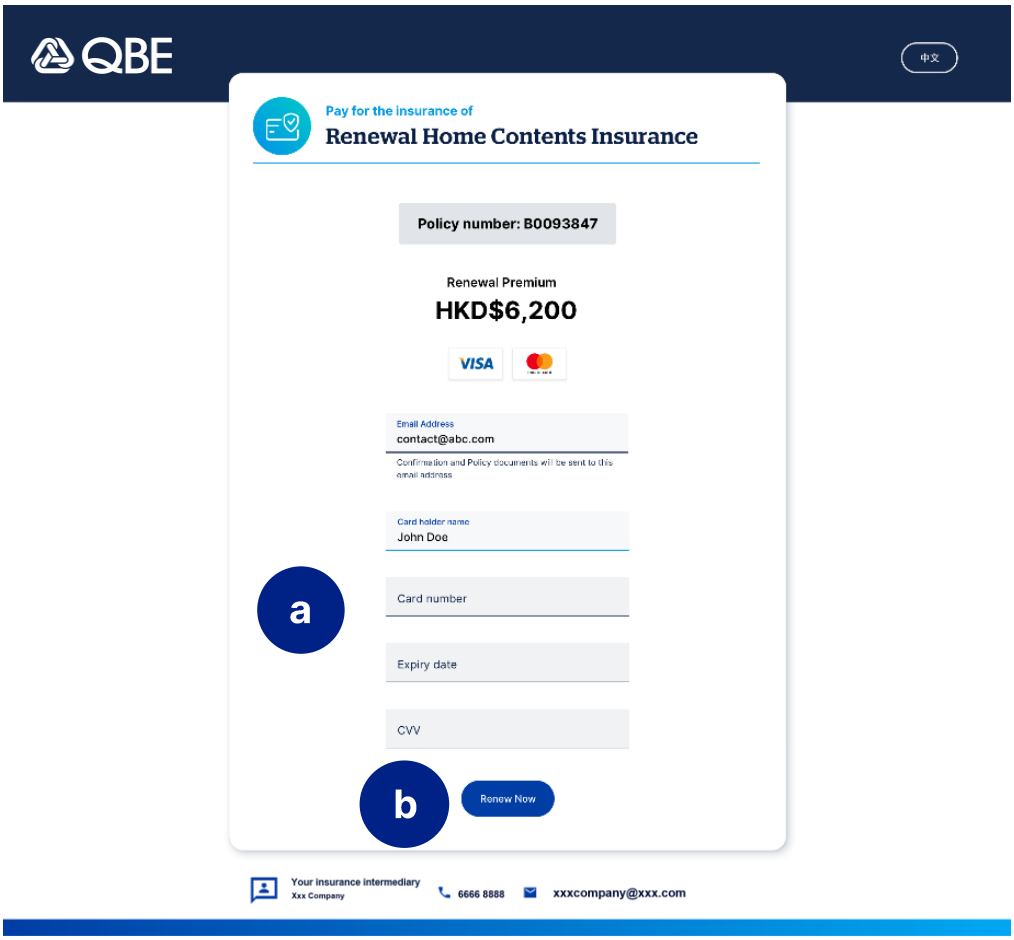
4.1 Email with payment button (Pay by Credit Card)

1a. Click **'Pay by Credit Card'** button

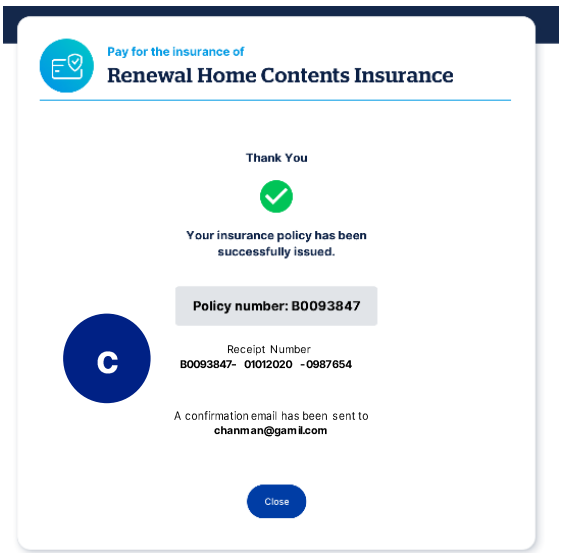
1b: Client will be directed to **payment gateway**

a. Enter **Credit Card Details**

b. Click **'Renew Now'** button



c. **Payment Confirmation WITH Receipt Number**



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4.2 Email without payment button

1. Clients need to contact their insurance intermediary to process renewal

2. Intermediary confirms renewal with QBE Hong Kong accordingly to current process

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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。

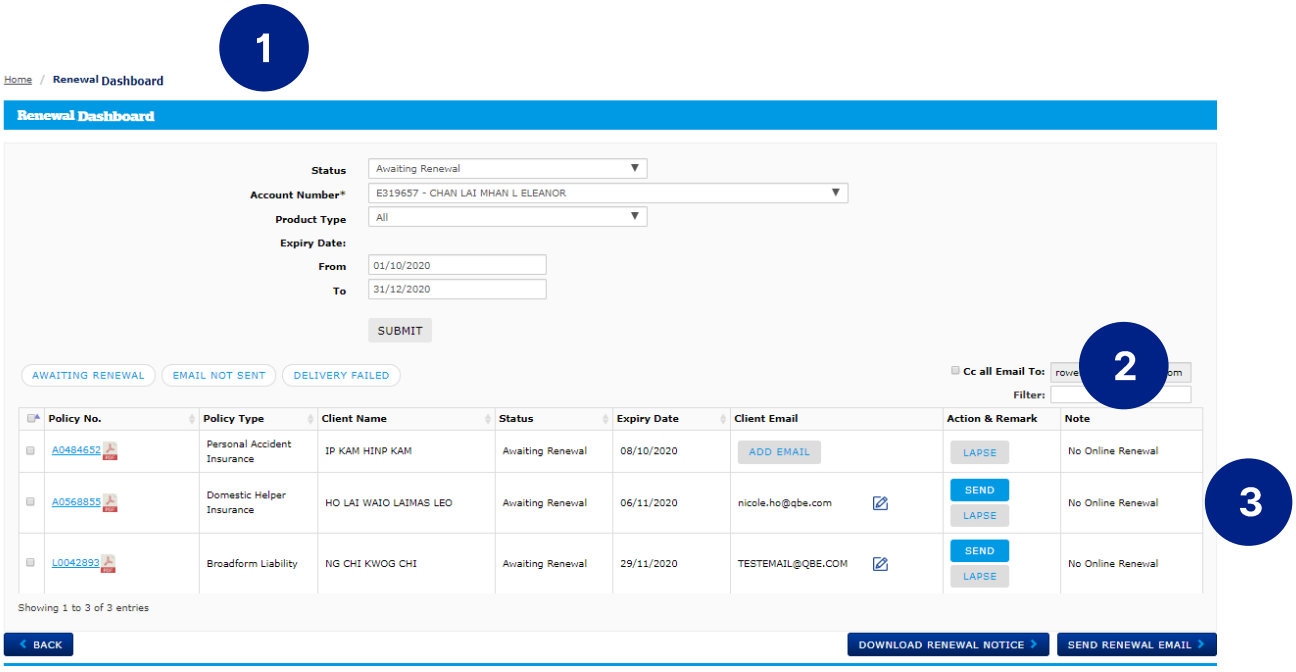
如有任何疑問，請聯絡您的保險中介人。

Dear CHAN TAI MAN,

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

4.3 How do I know which policy cannot renew online?

1. Go to **'Renewal Dashboard'**
2. Go to **' Note'** column
3. **'No Online Renewal'** message will be displayed if policy cannot renew online



Step: 5

Client Receive Renewal Documents

(Client and Intermediary will receive the confirmation email and Renewal Documents)

There are two types of Confirmation Emails for different products

5.1 Qnect Product (Personal Product)

a. Receive the Confirmation Email

(Renewal documents will be sent to client in 5-min after client received the renewal confirmation email)

Confirmation Email to Intermediary (Qnect Product)

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.

Confirmation Email to Client (Qnect Product)

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. Client Receive the Renewal Documents

(All Renewal Documents will be attached in the email)

QBE

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

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5.2 Qnect BIZ & SME & Non-Qnect Products

a. Qnect BIZ & SME

Renewal Documents will be uploaded on Qnect once ready.

b. Non-Qnect Products

Renewal Documents will be emailed to you once ready.

Thank you for supporting QBE Hong Kong.

Do you have any queries, please feel free to contact your Relationship Manager.

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