

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



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Go To Renewal Dashboard

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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



DO MORE

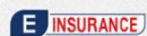
The QBE Insurance platform has been designed to support your growth by allowing you more flexibility in how you do business and providing valuable analytical insights.

[FIND OUT MORE](#)



Connect with QBE

QBE Insurance platform enables you to do business wherever you are. We give you the choice of connecting with us on the move via your mobile or tablet devices and from your office.



[CLICK HERE TO LOG IN](#)



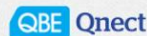
Email Address

Password

Remember my username

[LOGIN](#)

1



Email Address

Password

Remember my username

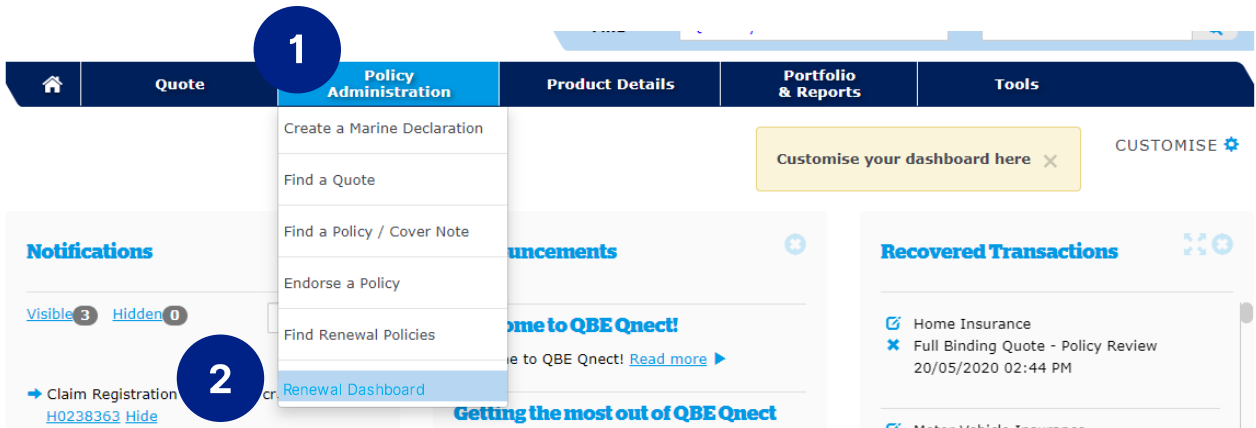
[LOGIN](#)

2

[Forgot Password?](#)

1.2 Search From Navigation Bar

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



1.3 View Renewal Dashboard

Home / Renewal Dashboard

Renewal Dashboard

Status:

Account Number*:

Product Type:

Expiry Date:

 From:

 To:

Cc all Email To:

 Filter:

Policy No.	Policy Type	Client Name	Status	Expiry Date	Client Email	Action & Remark	Note
No data available in table							

Showing 0 to 0 of 0 entries

Step: 2

View Renewal Policies

2.1 Search latest renewal policies

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

Policy Status changes:

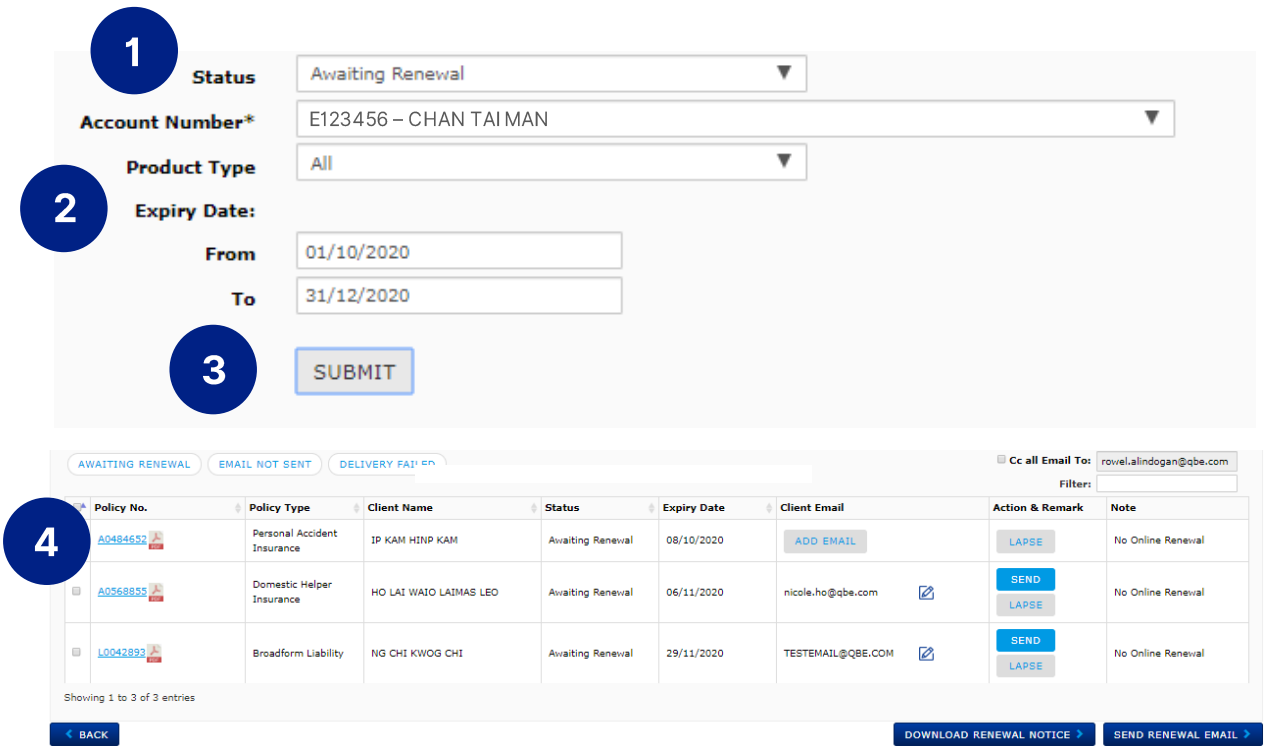
- i. Policy need to renew: **Awaiting Renewal**
- ii. Renewal Email and Renewal Notice sent out to client: **Pending Renewal Payment**
- iii. Renewed policy: **In Force**

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.**



1 Status: Awaiting Renewal

Account Number*: E123456 – CHAN TAI MAN

Product Type: All

2 Expiry Date:

From: 01/10/2020

To: 31/12/2020

3 SUBMIT

Policy No.	Policy Type	Client Name	Status	Expiry Date	Client Email	Action & Remark	Note
A0484552	Personal Accident Insurance	IP KAM HINP KAM	Awaiting Renewal	08/10/2020	ADD EMAIL	LAPSE	No Online Renewal
A0368855	Domestic Helper Insurance	HO LAI WAIQ LAIMAS LEO	Awaiting Renewal	06/11/2020	nicole.ho@qbe.com	SEND LAPSE	No Online Renewal
L0042892	Broadform Liability	NG CHI KWOG CHI	Awaiting Renewal	29/11/2020	TESTEMAIL@QBE.COM	SEND LAPSE	No Online Renewal

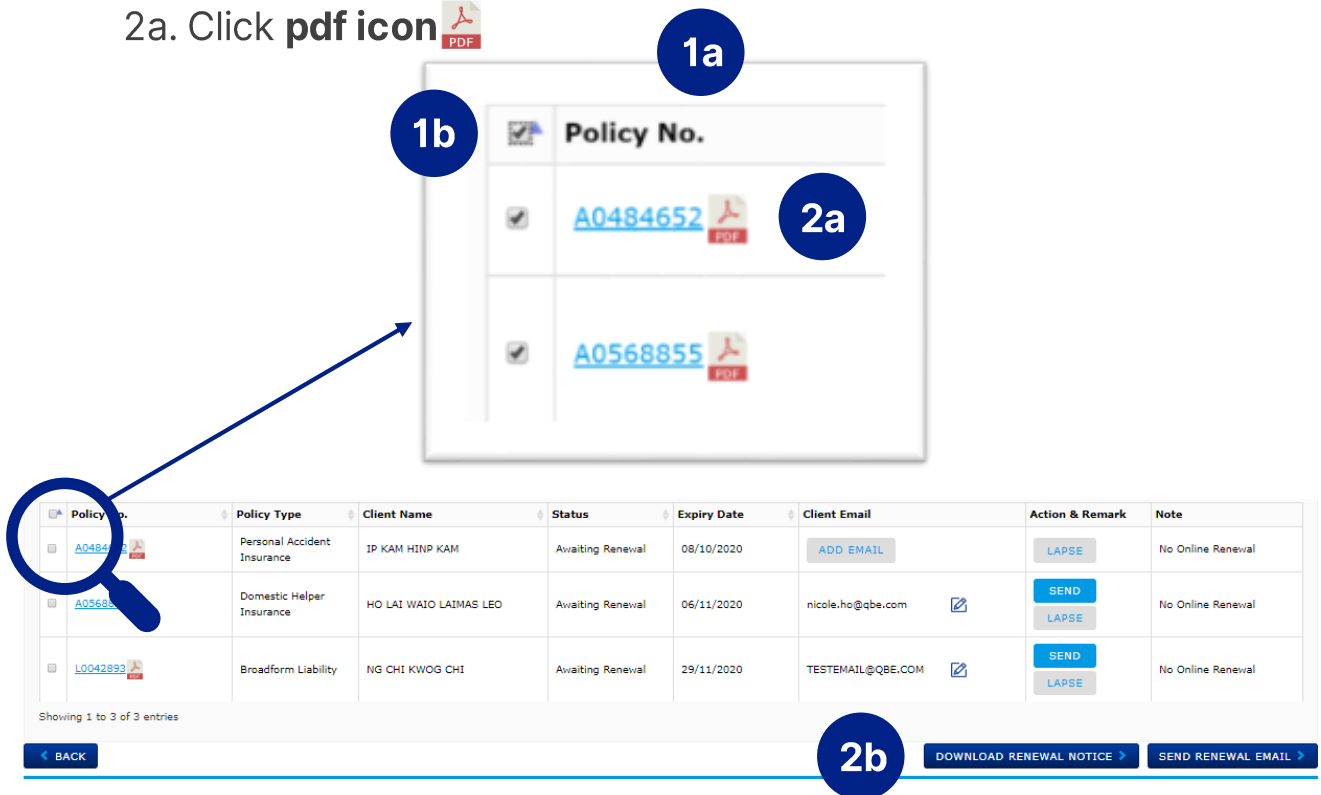
Showing 1 to 3 of 3 entries






BACK DOWNLOAD RENEWAL NOTICE SEND RENEWAL EMAIL

2.2a View Renewal Notice (Individually)

1a. Go to 'Policy No.' column

2a. Click pdf icon 



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	HO LAI WAJO LAIMAS 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

Showing 1 to 3 of 3 entries

[BACK](#) **2b** [DOWNLOAD RENEWAL NOTICE](#) [SEND RENEWAL EMAIL](#)

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)



Bulk Download Function

All documents save in a file

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

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

Policy No.	Policy Type	Client Name	Status	Expiry	Client Email	Action & Remark	Note
A0484652	Personal Accident Insurance	IP KAM HINP KAM	Awaiting Renewal	08	1 ADD EMAIL	LAPSE	No Online Renewal

2. Enter **Client Email** address

3. Click 'OK' button

Client Email

2 tomchan@gmail.com **3** OK


4. There will be a confirmation box

Message X

Client email is updated

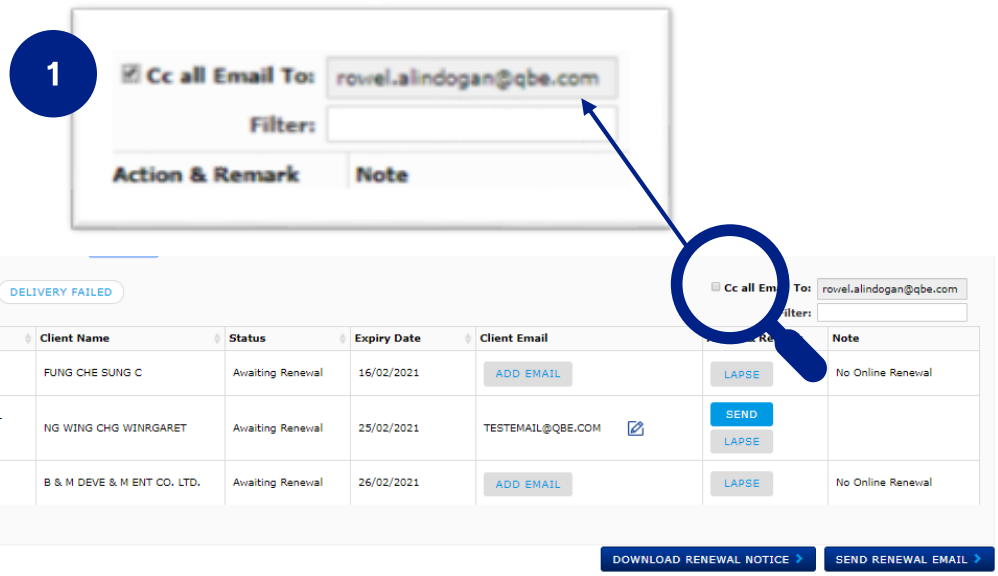
4 OK

5. Click  to edit the email (if needed)

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 5 	SEND LAPSE	No Online Renewal

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.



The screenshot shows a table with columns: Policy No., Policy Type, Client Name, Status, Expiry Date, Client Email, Action & Remark, and Note. A callout box labeled '1' points to the 'Cc all Email To' checkbox, which is checked and has the email 'rowel.alindogan@qbe.com' entered. Another callout box labeled '2' points to the 'SEND' button in the 'Action & Remark' column of the second row.

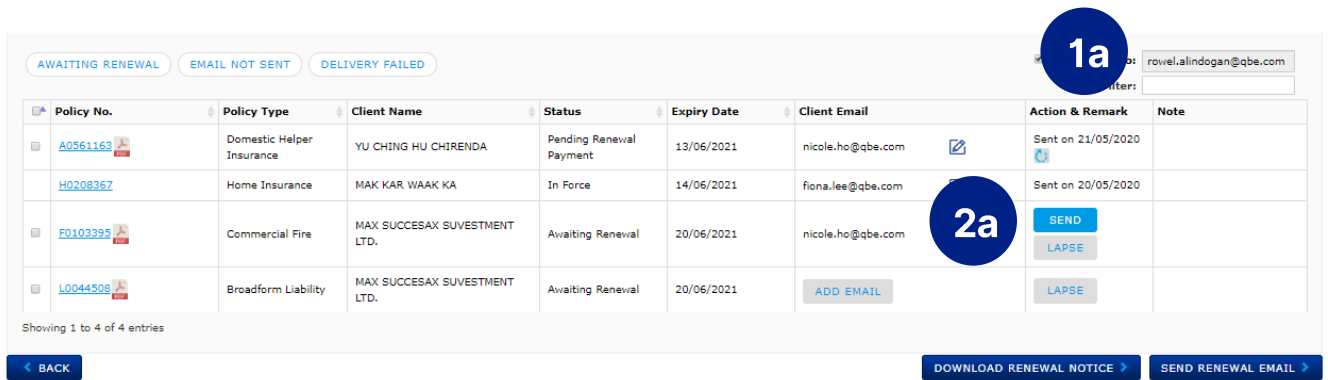
Policy No.	Policy Type	Client Name	Status	Expiry Date	Client Email	Action & Remark	Note
B0053386	Office Pack Insurance	FUNG CHE SUNG C	Awaiting Renewal	16/02/2021	ADD EMAIL	LAPSE	No Online Renewal
A0603526	Domestic Helper Insurance	NG WING CHG WINRGARET	Awaiting Renewal	25/02/2021	TESTEMAIL@QBE.COM	SEND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

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.)



The screenshot shows a table with columns: Policy No., Policy Type, Client Name, Status, Expiry Date, Client Email, Action & Remark, and Note. A callout box labeled '1a' points to the 'Cc all Email To' checkbox, which is checked and has the email 'rowel.alindogan@qbe.com' entered. Another callout box labeled '2a' points to the 'SEND' button in the 'Action & Remark' column of the third row.

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	

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'**

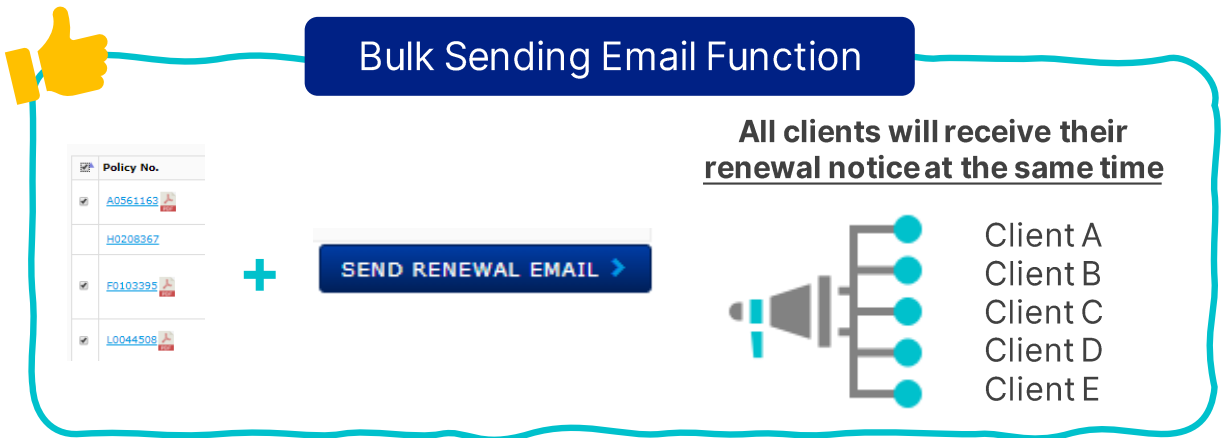
(Selected renewal notices and all related documents will be sent to individual customer)

AWAITING RENEWAL
EMAIL NOT SENT
DELIVERY FAILED

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

<input checked="" type="checkbox"/>	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="button" value="SEND"/> <input type="button" value="LAPSE"/>	
<input checked="" type="checkbox"/>	L0044508	Broadform Liability	MAX SUCCESAX SUVESTMENT LTD.	Awaiting Renewal	20/06/2021	<input type="button" value="ADD EMAIL"/>	<input type="button" value="LAPSE"/>	

Showing 1 to 4 of 4 entries



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

- Error message: Please enter Client Email

Message


Please enter Client Email

- Those missing client email rows will be highlighted in yellow


<input checked="" type="checkbox"/>	F0103395	Commercial Fire	MAX SUCCESAX SUVESTMENT LTD.	Awaiting Renewal	20/06/2021	nicole.ho@qbe.com	<input type="button" value="SEND"/> <input type="button" value="LAPSE"/>	
<input checked="" type="checkbox"/>	L0044508	Broadform Liability	MAX SUCCESAX SUVESTMENT LTD.	Awaiting Renewal	20/06/2021	<input type="button" value="ADD EMAIL"/>	<input type="button" value="LAPSE"/>	

Showing 1 to 4 of 4 entries

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)

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 Renewal Email Summary For Intermediary

1. After sending out renewal email, you will receive an **'Renewal Email Summary'**.
 - 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'**

			
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	

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



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

立即確認續保 Renew Now

1a 信用卡付款
Pay by Credit Card

致 CHAN TAI MAN,

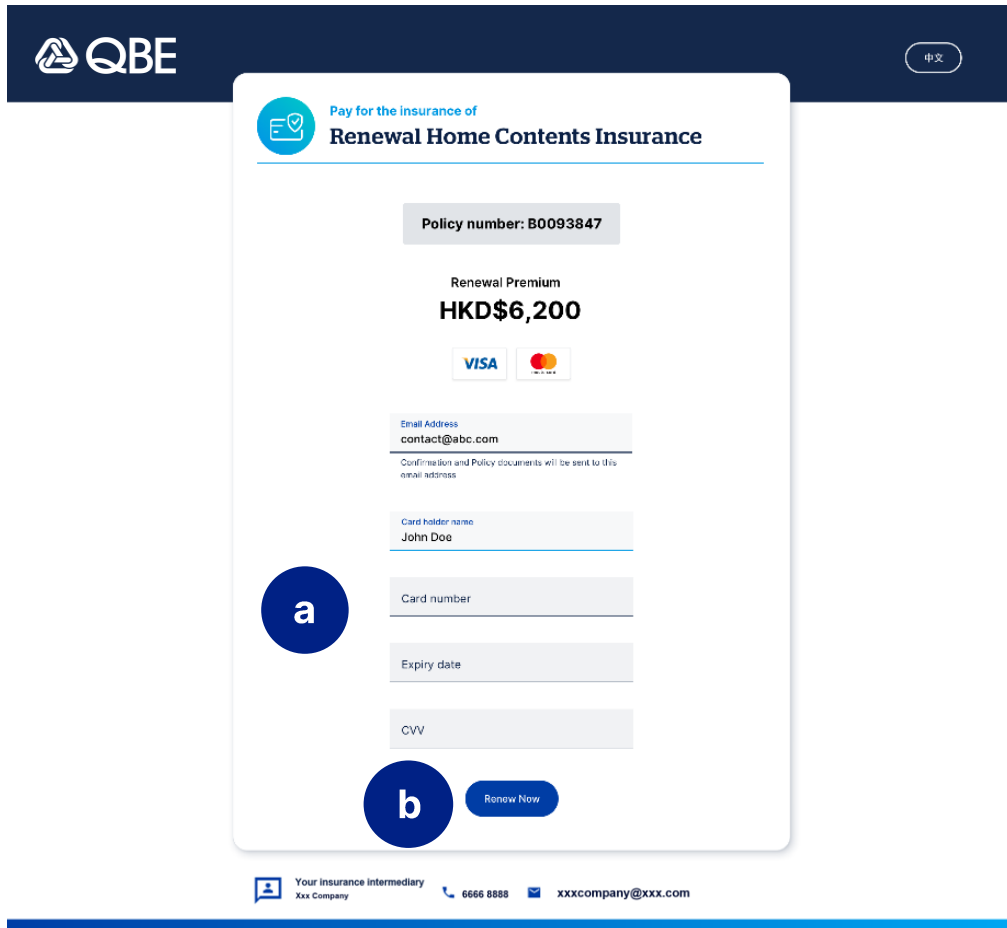
感謝您對昆士蘭保險香港的支持。您的保單即將過期。您可以輕鬆快捷地於網上續保 (請點擊以上“信用卡付款”按鈕), 以繼續享有周全保障。

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。

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

a. Enter **Credit Card Details**


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



Pay for the insurance of
Renewal Home Contents Insurance

Policy number: B0093847

Renewal Premium
HKD\$6,200

VISA 

Email Address
contact@abc.com

Confirmations and Policy documents will be sent to this email address

Card holder name
John Doe

Card number

Expiry date

CVV

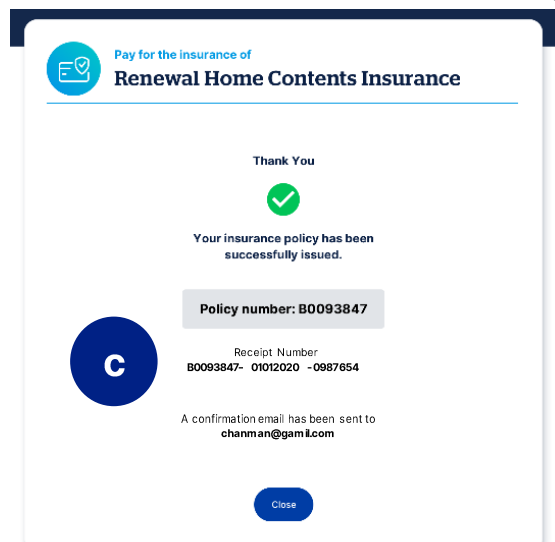
a

b [Renew Now](#)

Your Insurance Intermediary
xxx Company


6666 8888 xxxcompany@xxx.com

c. **Payment Confirmation WITH Receipt Number**



Pay for the insurance of
Renewal Home Contents Insurance

Thank You



Your insurance policy has been
successfully issued.

Policy number: B0093847

Receipt Number
B0093847- 01012020 -0987654

A confirmation email has been sent to
chanman@gamil.com

c

[Close](#)

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



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

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="button" value="SEND"/> <input type="button" value="LAPSE"/>	No Online Renewal
L0042893	Broadform Liability	NG CHI KWOG CHI	Awaiting Renewal	29/11/2020	TESTEMAIL@QBE.COM	<input type="button" value="SEND"/> <input type="button" value="LAPSE"/>	No Online Renewal

Showing 1 to 3 of 3 entries

2

3

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)

Confirmation Email to Client
(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.



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)



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 & 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.