

Qnect Renewal Dashboard 2.0

1. 更便利的搜尋過濾器 User-friendly Renewal Search Filter

- a.

根據自己所需篩選任何將於1個月/ 2個月/ 3個月/ 6個月或自定任何期限內到期的保單

You can easily filter the policies expiring in 1 month / 2 months / 3 months / 6 months or any customed period at your preference.
- b.

使用新的保單狀態選項可篩除已失效和已被取消的保單，令續保列表更清晰

You can use the new status option “All – Excluded Lapsed and Cancelled” to filter the awaiting renewal policies with lapsed and cancelled policies excluded.

2. 更流暢的頁面導航 Smoother Website Navigation

當點擊保單編號時，保單詳情將會在新的視窗版面中打開，而不會關閉您在續保儀表板中的搜索結果

When you left click on the policy number, the Policy Headers will be opened in a new tab without closing out your search result in the Renewal Dashboard

3. 新的Excel下載功能

此功能允許您將續保儀表板中的完整列表下載到Excel表格中

A new function allows you to export the whole renewal search list into an excel spreadsheet.

4. 其他改進 Other Revamps

- a.

常用按鈕移至頁面更明顯的位置，包括「發送續保電郵」/「下載續保通知書」/「下載到Excel表格」

Buttons of “Send Multiple Emails”, “Download Multiple Documents” and “Export to Excel” are moved to an upper and more obvious position.
- b.

保單狀態將以不同顏色顯示，讓您輕鬆區分

Colour-coding status allows you to view the different policies status at a glance.
- c.

「下載續保通知書」按鈕設於表格右側，PDF圖標更見明顯

More apparent “Renewal Notice Download” PDF icons locate at the right side of the table
- d.

新增綜合操作按鈕
(包含修改電郵、發送電郵、保單失效等操作指令)

Consolidated actions button (i.e. Edit Email, Send Email, Lapse Policies, etc.)

Renewal Dashboard

Renewal search by

Account Number*

E325779 - SIU SAU LIU SA

Product Type

All

Status

All - Exclude Lapsed and Cancelled

1a

Date Range

1 Month

2 Months

3 Months

6 Months

Custom

From

01/09/2020

To

01/12/2020

Search

1b

4a

Recent Records

Send Multiple Emails

Download Multiple Documents

Export to Excel

3

cc all email to me

2

All | Awaiting Renewal | Email Not Sent | Delivery Failed

Search / Filters

2	Policy No.	Policy Type	Client Name	4b Status	Expiry Date (DD/MM/YYYY)	Email to Client	Note	4c Download	4d Action
	H0214445	Home Insurance	POON HIU SOON H	In Force	01/09/2020				
	A0591516	Domestic Helper Insurance	WONG ON TIONG O	Awaiting Renewal	13/10/2020	TESTEMAIL@QBE.COM	No Online Renewal	PDF	Edit Email Send Email Lapse Policy
	A0591486	Domestic Helper Insurance	LEUNG KIT EUNG TERESA	Review Required	17/10/2020				
	L0064242	Product / Public Liability	H.K. GOLD .K. GLVER ORNAMENT UNION COMPNION PANY	Awaiting Renewal	22/10/2020		No Online Renewal	PDF	
	L0064236	Product / Public Liability	PUN MING KUN MI	Awaiting Renewal	29/10/2020	TESTEMAIL@QBE.COM		PDF	
	A0596660	Domestic Helper Insurance	TONG TAK CONG T	Awaiting Renewal	25/11/2020			PDF	

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