



User Guide

--- Motor Vehicle Insurance --- (Commercial Vehicle)

Version: May 2019

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A: Login Qnect	登入 Qnect
B: Create Quote	建立報價
C: Issue Cover Note	簽發臨時保單
D: Issue Policy	簽發保單
E: Endorsement	更改保單
F: Renew	續保

Part A

Login Qnect 登入 Qnect

A: Login Qnect 登入 Qnect



About
QBE

Products
we offer

Benefits of
working with us

Contact Us

DO MORE

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

LOGIN

FOR 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.



Get Started

Email Address

Password

☐ Remember my name

LOGIN

[Forgot Password?](#)


1. Login with **Email Address**
利用電郵地址登入
2. Key in **Password**
輸入密碼
3. Click 點擊 **LOGIN**
4. If you forget your password, please click **Forgot Password**
假如您忘記密碼，請點擊 **Forgot Password**

Part B

Create Quote

建立報價

B: Create Quote 建立報價



Qnect

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Find

Quote by Number

Q

Home
Quote
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Tools

Create a Quote
Modify a Quote

Notifications

Visible 1 Hidden 0 All ▼

→ TEST [Hide](#)

Announcements

Announcing the New Layout of Marine Certificate

Announcing the New Layout of Marine Certificate [Read more](#)

Announcing the QBE Marine Uplift

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Relocation Notice

Relocation Notice [Read more](#)

QBE Travelon Summer Promotion

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Packaged Quote - the easy option for retail and office businesses

Packaged Quote - the easy option for retail and office businesses [Read more](#)

Welcome to QBE Qnect!

Welcome to QBE Qnect! [Read more](#)

Recovered Transactions

Motor Vehicle Insurance

Quick Quote - Fast Quote Review

18/07/2017 11:27 AM

Renewal Notifications

Number of Policies Awaiting Renewal 0

Number of Expired Policies 0

Quotes

Domestic Helper

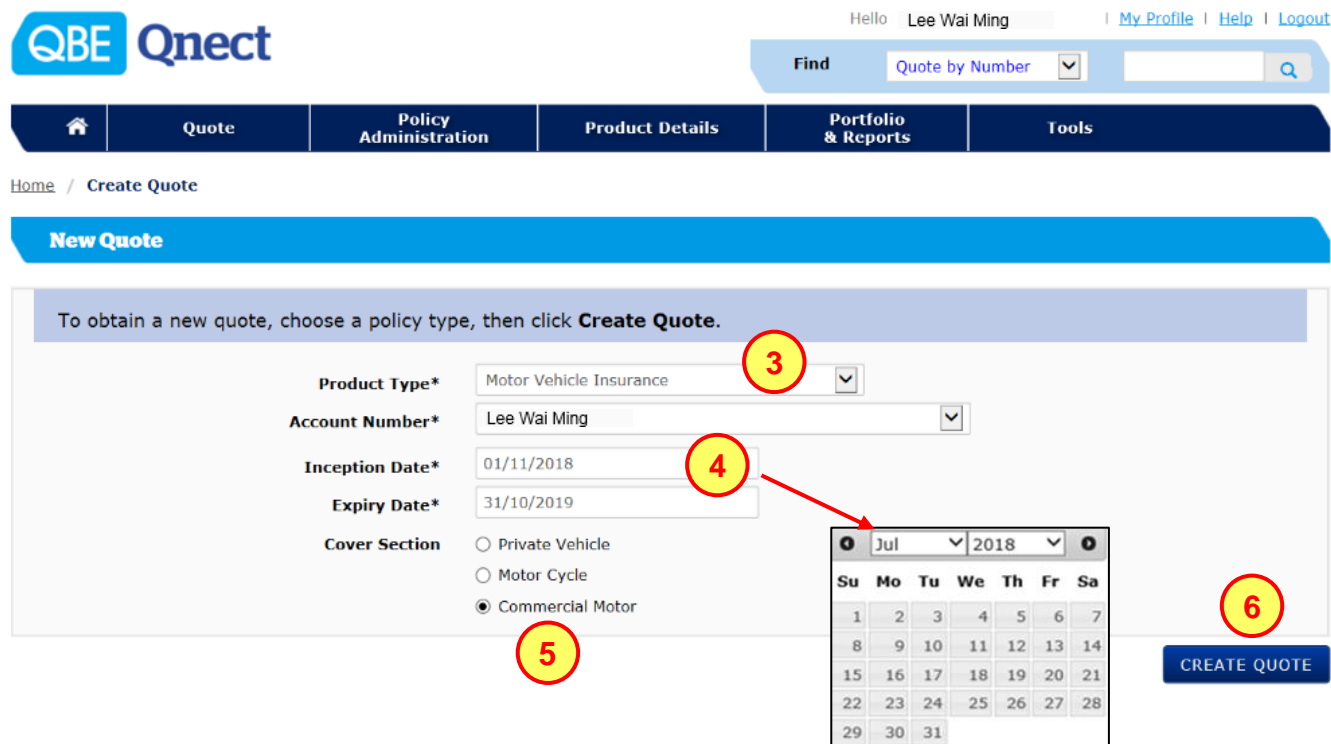
Home Insurance

1. Choose **Quote** from the main menu
從主頁面選單中，選擇 **Quote**
2. Select **Create a Quote**
選擇 **Create a Quote**

[Back to Contents 返](#)

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B: Create Quote 建立報價



QBE Qnect

Hello Lee Wai Ming | [My Profile](#) | [Help](#) | [Logout](#)

Find Quote by Number

[Home](#) / [Create Quote](#)

New Quote

To obtain a new quote, choose a policy type, then click **Create Quote**.

Product Type* Motor Vehicle Insurance

Account Number* Lee Wai Ming

Inception Date* 01/11/2018

Expiry Date* 31/10/2019

Cover Section

☐ Private Vehicle

☐ Motor Cycle

☒ Commercial Motor

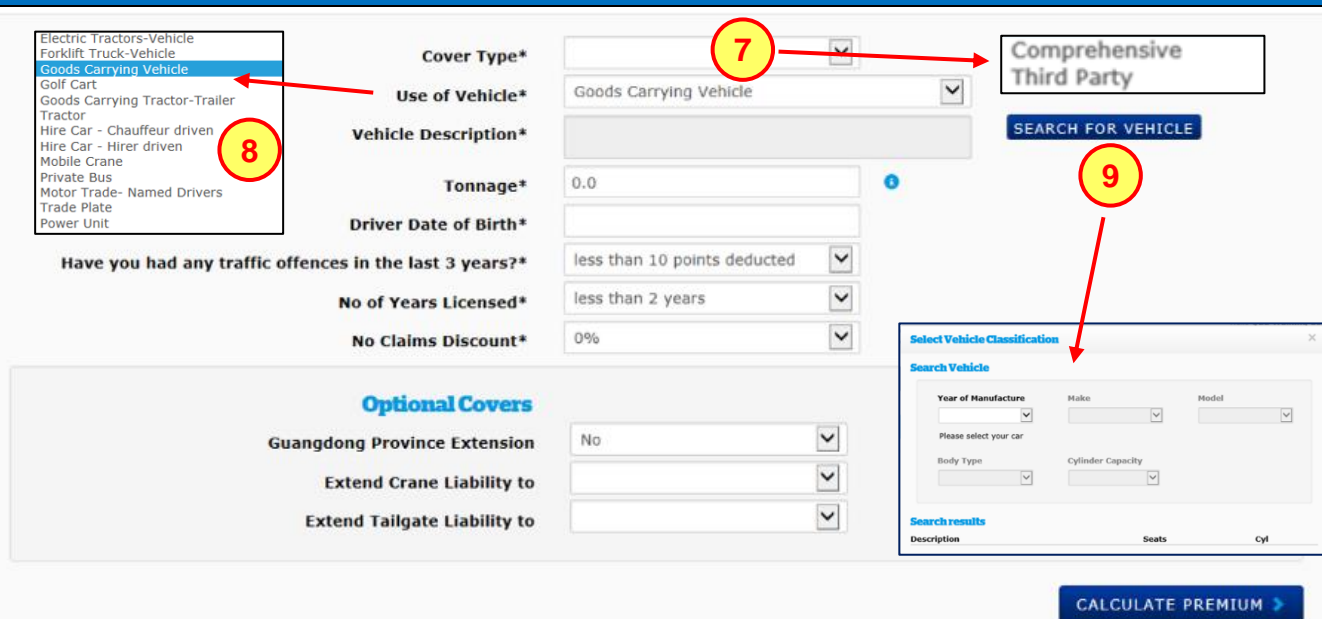
Calendar: Jul 2018

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

CREATE QUOTE

3. Select **Motor Vehicle Insurance** from Product Type
從 Product Type 選項中選擇 **Motor Vehicle Insurance**
4. Select **Inception Date** in the calendar and system will default **Expiry Date** as 1 year after Inception Date
從月曆中選擇保單之**生效日期**，系統已預設保單之**保障到期日**為生效日期之後一年
5. Select **Commercial Motor** from Cover Section
從 Cover Section 選項中選擇 **Commercial Motor**
6. Click 點擊

B: Create Quote 建立報價



The screenshot shows the 'Create Quote' form with the following fields and callouts:

- Callout 7:** Points to the 'Cover Type*' dropdown menu, which is currently set to 'Comprehensive Third Party'.
- Callout 8:** Points to the 'Use of Vehicle*' dropdown menu, which is currently set to 'Goods Carrying Vehicle'.
- Callout 9:** Points to the 'SEARCH FOR VEHICLE' button.

The form includes the following sections:

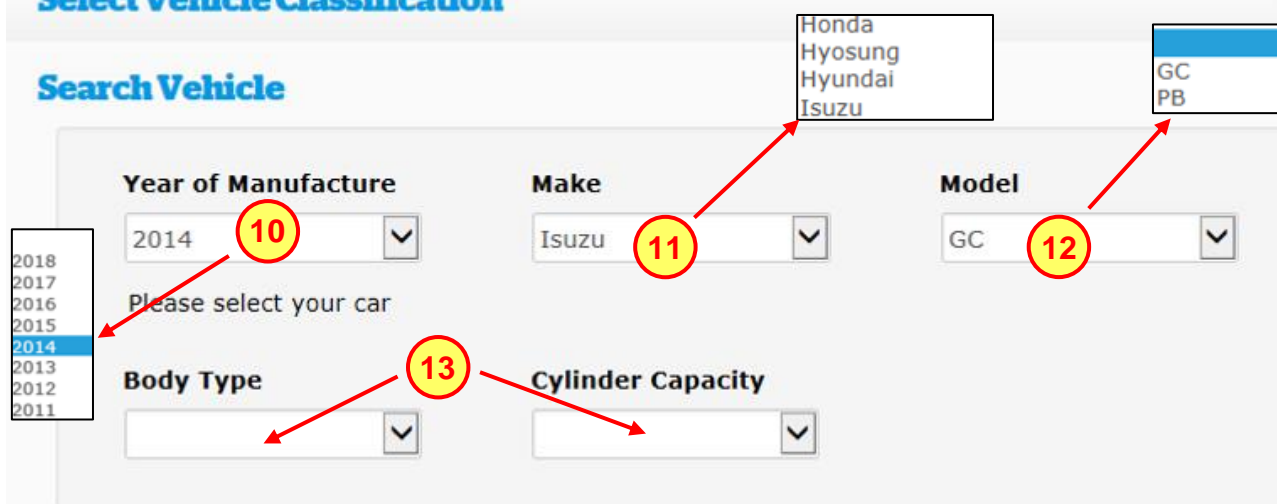
- Cover Type*:** A dropdown menu with options: Comprehensive, Third Party.
- Use of Vehicle*:** A dropdown menu with options: Goods Carrying Vehicle, Hire Car - Chauffeur driven, Hire Car - Hirer driven, Mobile Crane, Private Bus, Motor Trade- Named Drivers, Trade Plate, Power Unit.
- Vehicle Description*:** A text input field.
- Tonnage*:** A text input field with a value of 0.0.
- Driver Date of Birth*:** A text input field.
- Have you had any traffic offences in the last 3 years?*** A dropdown menu with options: less than 10 points deducted, more than 10 points deducted.
- No of Years Licensed*:** A dropdown menu with options: less than 2 years, 2 years or more.
- No Claims Discount*:** A dropdown menu with options: 0%, 10%, 20%, 30%, 40%, 50%, 60%, 70%, 80%, 90%, 100%.
- Optional Covers:**
 - Guangdong Province Extension:** A dropdown menu with options: No, Yes.
 - Extend Crane Liability to:** A dropdown menu with options: No, Yes.
 - Extend Tailgate Liability to:** A dropdown menu with options: No, Yes.
- SEARCH FOR VEHICLE:** A button that opens a modal window for vehicle search.
- SEARCH RESULTS:** A table showing search results with columns: Description, Seats, Cyl.
- CALCULATE PREMIUM:** A button to calculate the premium.

7. Select **Comprehensive** or Third Party from the Cover Type
從 Cover Type 中選擇 **Comprehensive** 或 Third Party
8. Select type of use from the **Use of Vehicle** (system will default “Goods Carrying Vehicle”)
從車輛用途選項中選擇 **Use of Vehicle** (系統已預設為“Goods Carrying Vehicle”)
9. Click 點擊 **SEARCH FOR VEHICLE**

B: Create Quote 建立報價

Select Vehicle Classification

Search Vehicle



Year of Manufacture 2014 (10)

Make Isuzu (11)

Model GC (12)

Body Type (13)

Cylinder Capacity (13)

Search results

Description	Seats	Cyl
Goods Carrying Vehicles / Tractors 16T		
Goods Carrying Vehicles / Tractors 24T		
Goods Carrying Vehicles / Tractors 2.8T		
Goods Carrying Vehicles / Tractors 40T		

10. Select **Year of Manufacture**
選擇製造年份
11. Select **Make**
選擇廠名
12. Select **Model**
選擇型號
13. Select **Body Type** and **Cylinder Capacity**
選擇車身類型和汽缸容量
14. Select the car from the **Search results**
從 **Search results** 中選擇汽車

B: Create Quote 建立報價



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Find



Quote

Policy Administration

Product Details

Portfolio & Reports

Tools

Effective Date: 01/11/2018 • Period of Insurance: 01/11/2018 to 31/10/2019 Account: 3680008 • Quick Quote:

Motor Quick Quote

Cover Type*	<input type="text" value="Comprehensive"/>	
Use of Vehicle*	<input type="text" value="Goods Carrying Vehicle"/>	
Vehicle Description*	<input type="text" value="2014 Isuzu GC Goods Carrying Vehicles / Tractors 16T"/>	<input type="button" value="SEARCH FOR VEHICLE"/>
Sum Insured*	<input type="text" value="300000"/>	15
Tonnage*	<input type="text" value="16"/>	
Driver Date of Birth*	<input type="text" value="20/06/1970"/>	16
Have you had any traffic offences in the last 3 years?*	<input type="text" value="less than 10 points deducted"/>	17
No of Years Licensed*	<input type="text" value="2 years or more"/>	18
No Claims Discount*	<input type="text" value="30%"/>	19

less than 10 points deducted

10 or more points deducted

less than 2 years

2 years or more

0%

10%

20%

30%

15. Fill in Sum Insured

輸入投保額

16. Fill in Driver Date of Birth

輸入司機出生日期

17. Has the driver had any offences in the last 3 years (system will default “less than 10 points deducted”)

過去 3 年司機被扣除的分數 (系統已預設為“10 分以下”)

18. Select Number of Years Licensed

選擇司機的駕駛經驗

19. Select No Claim Discount

選擇無索償折扣

Driver means

司機是指



Frequent Driver

通常駕駛投保車輛的司機

B: Create Quote 建立報價

Optional Covers

Guangdong Province Extension: No (20)

Extend Crane Liability to: HK\$750,000 AOA/AOP (21)

Extend Tailgate Liability to: HK\$1,000,000 AOA/AOP (21)

22 **CALCULATE PREMIUM**

Premium HK\$ 8,904.38

Section I

- \$15000 / 3% SI Accidental Damage Excess
- \$15000 Theft Excess
- \$10000 Young Driver Excess
- NEW** \$10000 Inexperienced Driver Excess

Section II

- \$15000 Third Party Property Damage Excess
- \$10000 Young Driver Excess
- NEW** \$10000 Inexperienced Driver Excess

23 **OBTAIN QUOTE** **CONVERT TO POLICY**

20. Select **Guangdong Province Extension** (system will default "No")
選擇 **Guangdong Province Extension** (系統已預設為 "No")
21. Select **Extend Crane Liability or Extend Tailgate Liability** to HK\$750,000 or HK\$1,000,000
選擇 **Extend Crane Liability or Extend Tailgate Liability** 至 HK\$750,000 或 HK\$1,000,000
22. Click **CALCULATE PREMIUM** the system will calculate the premium automatically
點擊 **CALCULATE PREMIUM** · 系統會自動計算保費
23. Click **OBTAIN QUOTE** to prepare Quick Quote for the customer or click **CONVERT TO POLICY** to issue the policy directly
點擊 **OBTAIN QUOTE** 去為客戶提供初步報價或者點擊 **CONVERT TO POLICY** 去直接簽發保單
Click **OBTAIN QUOTE** to issue the quotation
點擊 **OBTAIN QUOTE** 建立報價

B: Create Quote 建立報價

Customer Details

SEARCH FOR EXISTING CUSTOMER

Customer Type*

Name*

ID Number*

Gender*

Date of Birth*

Home Telephone Number

Business Telephone Number

Mobile Number

Fax Number

Email Address

Unit / Floor Number

Building Number and Name

Street Number and Name*

District

Country*

Search Customer

Customer Type

Search By

Name

Search results

If customer is not found, click X to create a new customer

Customer Identity No	Name	Address
D735214(0)	CHOY TUNG CHUN	100 LONG ROAD

Total Premium **7,902.16** HKD

24. If client is an existing customer, select **SEARCH FOR EXISTING CUSTOMER** to retrieve his/her details
如果客人已是現有客戶，您可以選擇 **SEARCH FOR EXISTING CUSTOMER** 取得他/她的資料

25. Enter customer's information in the fields provided (* is compulsory)
按表單內容輸入客戶的資料 (* 必須填寫)

26. Click to save your quotation as pending
點擊 保存報價以待處理

OR 或

27. Click to issue the quotation
點擊 建立報價

B: Create Quote 建立報價

Hello **Lee Wai Ming**
[My Profile](#) | [Help](#) | [Logout](#)

Find

[Home](#) / [Quote Header](#)

[Quote](#) | [Policy Administration](#) | [Product Details](#) | [Portfolio & Reports](#) | [Tools](#)

Quote Header (based on Recent Quote)

Quote No: 00062188	Period of Insurance: 01/11/2018 to 31/10/2019
Quote Type: Motor Vehicle Insurance (MVA)	Quote Expiry Date: 31/10/2018
Customer No: 04570625	Wording: UWD.PVCM.V2-2.6.1606
Customer Name: CHOY TUNG CHUN	Branch: 01
Address: FLAT A, 33F TALL TOWER 100 LONG ROAD QUARRY BAY	Campaign Code:
Agent: Lee Wai Ming	

[Transaction History](#) | [Documents](#)

Effective Date	Email	Quote Type	Quote Status	Document Type
1 01/11/2018		Quick Quote	Issued	Policy Wording Quotation

28. Click **Documents** to enter the Documents folder
 點擊 **Documents** 進入文件夾頁面

29. **Document Type** (Policy Wording /Quotation) · click on the document link (blue underline) to view the document

Document Type – (保單條款/報價) · 點擊文件名稱去檢閱文件

保單條款

Commercial Motor Vehicle Policy

商業汽車保險單

QBE Hongkong & Shanghai Insurance Ltd.
 怡和保險有限公司
 A member of the worldwide QBE Insurance Group (Incorporated in Hong Kong)
 20/F, Colindale House, Tai Koo Place, 87A King's Road, Quarry Bay, Hong Kong
 香港怡和保險有限公司 20/F 太古廣場大廈 87A 號
 www.qbe.com.hk

Customer Service Hotline 客戶服務熱線 +852 2828 1998
 Customer Service Fax 客戶服務傳真 +852 3607 0380
 Claims Hotline 報案熱線 +852 2827 0666
 Claims Fax 報案傳真 +852 3607 0330

Cover	Operative Sections
Comprehensive	Section (I), (II)
Third Party Fire & Theft	Section (I) as amended by sub-section (I) and Section (I)
Third Party Legal Liabilities	Section (I)

(4) LIMITATIONS AS TO USE OF THE MOTOR VEHICLE

(a) The Insurance coverage under any part of this Policy is operative only when the Motor Vehicle is used:

(i) in operation with the Insured's business or the business of any person to whom the Motor Vehicle is lent or

(ii) for social, domestic and pleasure purposes.

Whilst the Motor Vehicle is so used, the carriage of passengers (other than for hire or reward) is permitted.

(b) This Policy will not operate when the Motor Vehicle is used:

(i) for racing, polo, motor speed trials and/or speed testing.

30. Click **Email** to send the policy wording and quotation to customer
 點擊 **Email** 將保單條款及報價文件以電郵發送給客戶

報價

QBE Hongkong & Shanghai Insurance Limited
 33/F, Colindale House, Tai Koo Place, 87A King's Road, Quarry Bay, Hong Kong
 Customer Service Hotline +852 2828 1998 • Customer Service Fax +852 3607 0380
 怡和保險有限公司 33/F 太古廣場大廈 87A 號
 客戶服務熱線 +852 2828 1998 • 客戶服務傳真 +852 3607 0380
 www.qbe.com.hk

Page 1 of 5 Date of Issue 16/09/2018

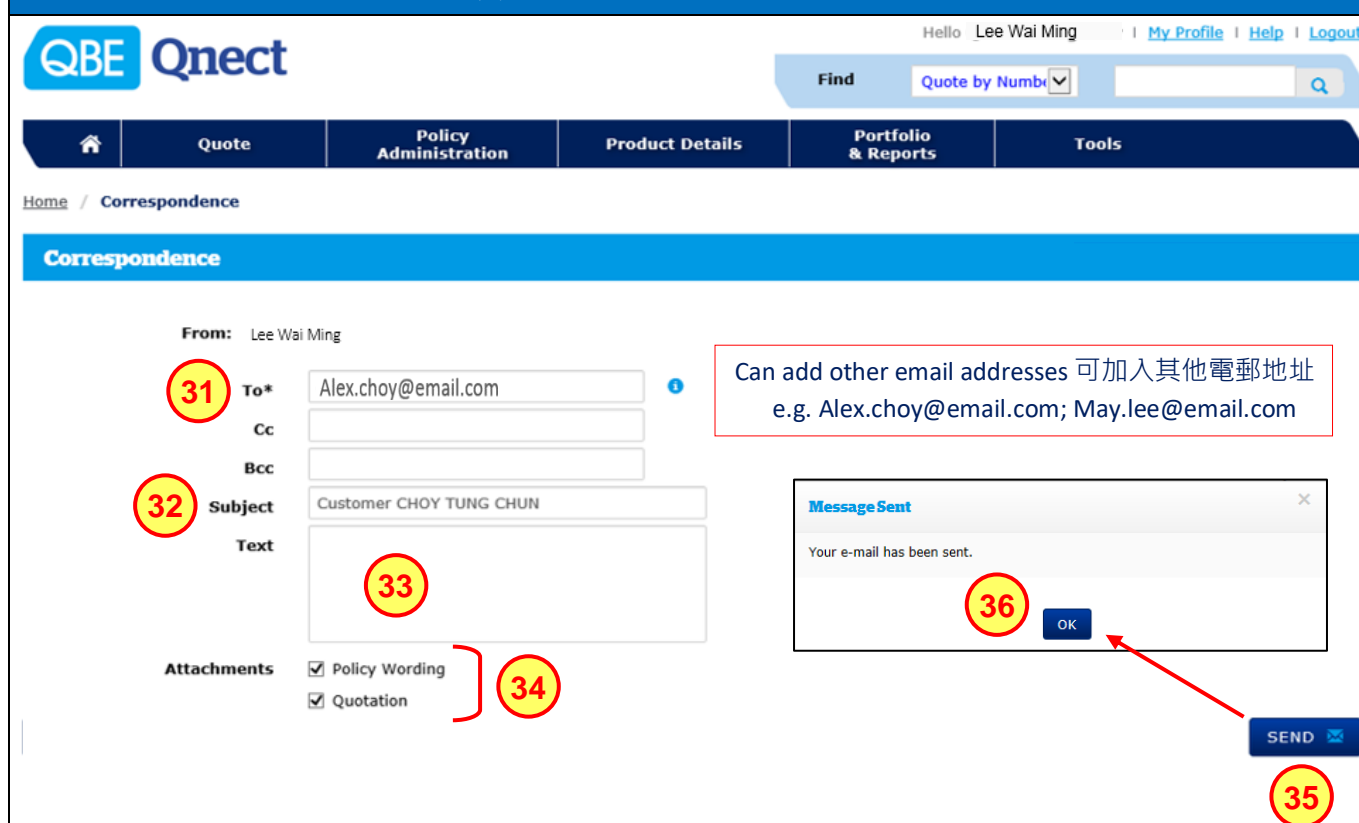
Commercial Vehicle QUOTATION

CHOY TUNG CHUN
 100 LONG ROAD
 FLAT A, 33F
 TALL TOWER
 QUARRY BAY
 HONG KONG

Quotation Number 報價號碼	Period of Insurance 承保日期	Account Number 記帳號碼
01-00062188-MVA-Q001	01/11/2018 to 31/10/2019 (Both Dates Inclusive)	3660003 QBC WING CBC W HAN

Name of Proposed Insured
CHOY TUNG CHUN

B: Create Quote 建立報價



31. To – System will default the customer email address (can add other email addresses, using semicolon (;) to separate email addresses)

致 – 系統會預設客戶的電郵地址 (可利用分號 (;) 相隔電郵地址以加入其他電郵地址)

32. Subject – System will default the Subject to be the name of customer but you may enter your own subject

郵件標題 – 系統會預設郵件標題為客戶的姓名，惟您可以輸入自定的郵件標題

33. Text – You may enter your content

郵件內容 – 可以輸入自定的內容

34. Attachments – System will default some Policy Documents such as quotation to be sent and you may uncheck the box besides the document's name if you do not want to send it

附件文件 – 系統已預設附上一些相關文件 (例如: 報價)，惟如該些文件是不需要，您可以剔除對應的文件方格

35. Click 點擊 

36. A pop-up message will show that the email has been sent and then click 

頁面會有顯示電子郵件已發送，然後點擊 

Part C

Issue Cover Note

簽發臨時保單

C: Issue Cover Note 簽發臨時保單

There are two options of finding an existing Quote in Qnect in order to issue Cover Note:
Qnect 有兩種途徑去尋找現有的報價去進行簽發臨時保單:

Option One

第一種方法

Use **Find** option (top right-hand side of the Qnect Home page)
利用 Qnect 頁面右上方的 **Find** 功能

Or 或

Option Two

第二種方法

Use **Policy Administration** – Find a Quote
利用 **Policy Administration** 中的 Find a Quote 功能

Option One

第一種方法

To retrieve the record by using the **Quote Number** : 00050433
輸入 **報價號碼** (00050433) 以取得報價資料

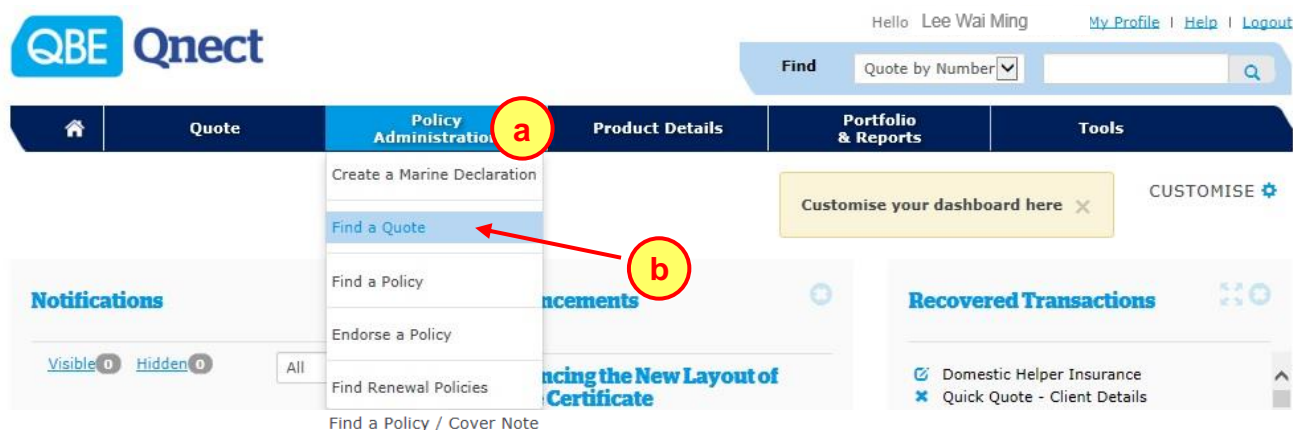


- Select **Quote by Number** from **Find** option
從 **Find** 中選擇 **Quote by Number** 報價號碼
- Enter Quote Number: **00062188**
輸入報價號碼: **00062188**
- Click 點擊 

C: Issue Cover Note 簽發臨時保單

Option Two 第二種方法

To retrieve the records by using the Customer or Quote Number
輸入客戶資料或報價碼號以取得報價資料

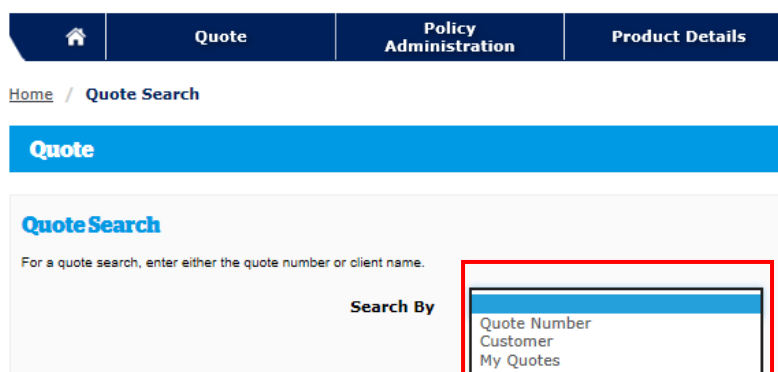


- a. Choose **Policy Administration** from the main menu
從主頁面選單中，選擇 **Policy Administration**
- b. Select **Find a Quote**
選擇 **Find a Quote**

You can either search by
您可選擇利用

- Quote Number
報價號碼
- Customer (Name / ID Number)
客戶 (姓名 / 身份證號碼)
- My Quote
我的報價記錄

to retrieve the Quote information
去取得報價資料



C: Issue Cover Note 簽發臨時保單

Example 1: Use Option Two and Search By – Customer (Name / ID Number)

例子一：選擇第二種方法，並利用客戶姓名 / 身份證號碼去搜尋

[Home](#) / [Quote Search](#)

Quote

Quote Search

For a quote search, enter either the quote number or client name.

Search By

Customer
▼

☒ Include Expired Quotes

SEARCH FOR EXISTING CUSTOMER

Search Results

Quote Number	Client Name	Policy type	Status	Expires
--------------	-------------	-------------	--------	---------

- i. Search by – **Customer (Name)**
從搜尋選項中，選擇**客戶 (姓名)**

- ii. Click 點擊 SEARCH FOR EXISTING CUSTOMER

- iii. Select Customer Type – Personal
從 Customer Type 中選擇 Personal

- iv. Select Search By – Name
從 Search By 中選擇 Name

Select Search By – ID Number
從 Search By 中選擇 ID Number

- v. Enter Name – Choy Tung Chun
輸入客戶姓名 – Choy Tung Chun

Enter ID Number – A735214(0)
輸入 ID Number – A735214(0)

- vi. Click 點擊 SEARCH

Search Customer ✕

Customer Type

Personal
▼

Search By

Name
▼

Name

Choy Tung Chun

SEARCH

Search Customer ✕

Customer Type

Personal
▼

Search By

ID Number
▼

ID Number

A735214(0)

SEARCH

C: Issue Cover Note 簽發臨時保單

Example 2: Use Option Two and Search By – Quote Number

例子二：選擇第二種方法，並利用報價號碼去搜尋

[Home](#) / [Quote Search](#)

Quote

Quote Search

For a quote search, enter either the quote number or client name.

Search By

Quote Number i

☐ Include Expired Quotes

Quote Number*

00062188 ii

SEARCH iii

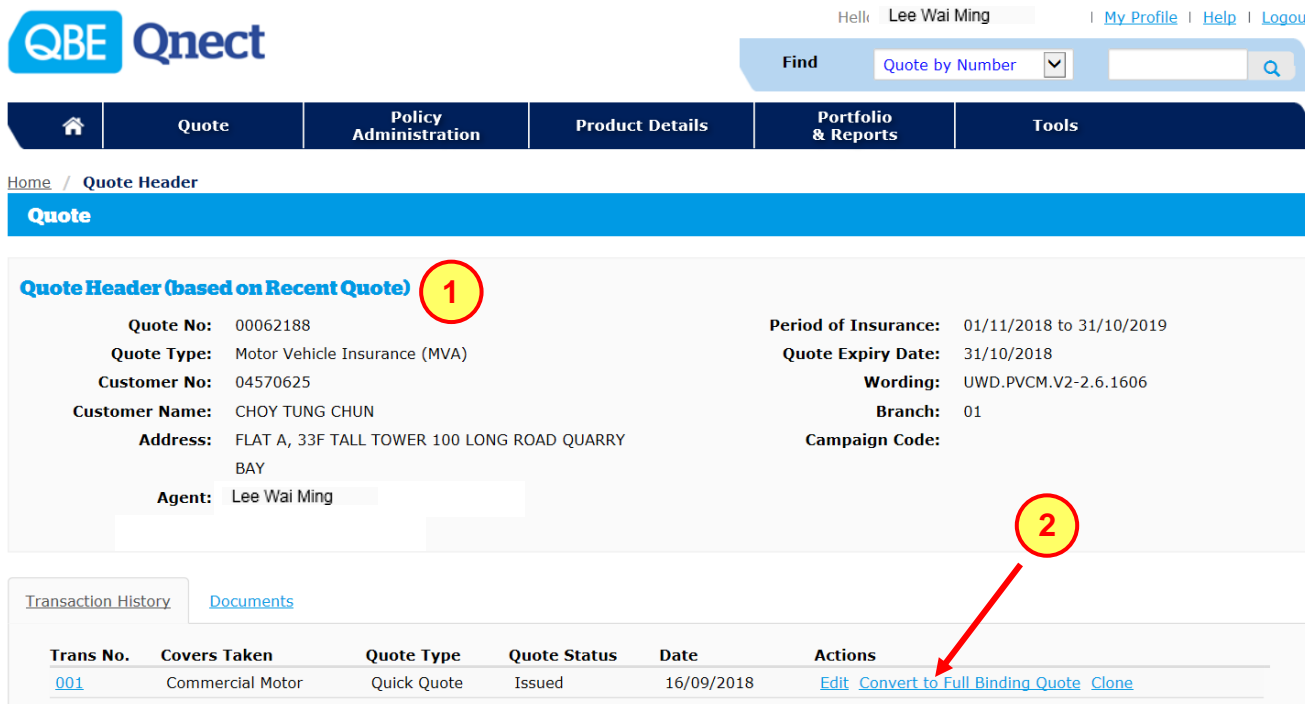
Search Results

Quote Number	Client Name	Policy type	Status	Expires
00062188 iv	CHOY TUNG CHUN	Motor Vehicle Insurance (MVA)	Issued	15/08/2019

[← BACK](#)

- i. Search By – **Quote Number**
從搜尋選項中，選擇報價號碼
- ii. Enter **Quote Number** – e.g. 00062188
輸入報價號碼 – 例如: 00062188
- iii. Click 點擊 SEARCH
- iv. Click on the **Quote Number: 00062188** and go to the quotation details
點擊報價號碼: 00062188 去進入報價內容

C: Issue Cover Note 簽發臨時保單



Quote Header (based on Recent Quote) 1

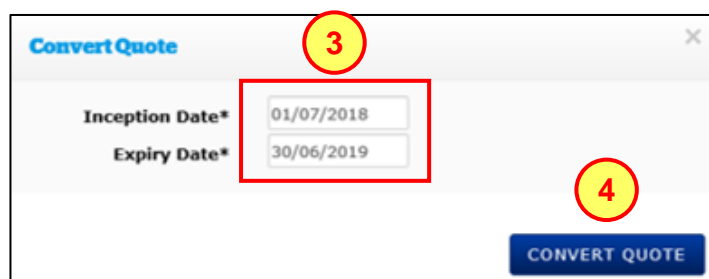
Quote No: 00062188
 Quote Type: Motor Vehicle Insurance (MVA)
 Customer No: 04570625
 Customer Name: CHOY TUNG CHUN
 Address: FLAT A, 33F TALL TOWER 100 LONG ROAD QUARRY BAY
 Agent: Lee Wai Ming

Period of Insurance: 01/11/2018 to 31/10/2019
 Quote Expiry Date: 31/10/2018
 Wording: UWD.PVCM.V2-2.6.1606
 Branch: 01
 Campaign Code:

Transaction History Documents

Trans No.	Covers Taken	Quote Type	Quote Status	Date	Actions
001	Commercial Motor	Quick Quote	Issued	16/09/2018	Edit Convert to Full Binding Quote Clone

1. **Quote Header** main page
Quote Header 頁面
2. Click on **Convert to Full Binding Quote** to issue Cover Note
點擊 **Convert to Full Binding Quote** 去簽發臨時保單
3. Review **Inception Date** and **Expiry Date**
檢閱起保日期及到期



Convert Quote 3

Inception Date* 01/07/2018
 Expiry Date* 30/06/2019

4
 CONVERT QUOTE

4. Click 點擊 **CONVERT QUOTE**

C: Issue Cover Note 簽發臨時保單



Hello Lee Wai Ming

G2 | [My Profile](#) | [Help](#) | [Logout](#)

Find

Quote by Number



Quote

Policy Administration

Product Details

Portfolio & Reports

Tools

Insurance Details > Risk Details > Policy Review > Customer Details

Effective Date: 01/11/2018 • Period of Insurance: 01/11/2018 to 31/10/2019

Account: 3680008 • Full Binding Quote: 00062188

Motor Vehicle Insurance

CUSTOMER VIEW - ON

PRINT

Error Messages

- Field must be entered
- Insured driver is required

5

Review

Period of Insurance 01 November 2018 to 31 October 2019

Non-Situation Dependent Risks

Cover Sections

[Expand All](#) / [Collapse All](#)

6

[Commercial Vehicle: 2014 Isuzu GC](#)

Sub-Totals

Annual Premium	Premium Due	Levy	Total Due	
\$0.00	\$0.00	\$0.00	\$0.00	ERROR
\$0.00	\$0.00	\$0.00	\$0.00	










Annual Premium	Premium Due	Levy	Total Due
Policy Total	\$0.00	\$0.00	\$0.00


5. **Error Messages** is just a normal reminding message to request you fill in the driver and vehicle's information

Error Messages 是一個正常的信息提示去提醒您輸入司機及汽車的資料

6. Click **the car link** in the in Cover Sections to fill in the driver and vehicle's information
在 Cover Sections 中點擊 **車輛連結** 去輸入司機及汽車的資料

C: Issue Cover Note 簽發臨時保單**Vehicle Details**

Cover Type*	Comprehensive	
Use of Vehicle*	Goods Carrying Vehicle	
Vehicle Description*	2014 Isuzu GC Goods Carrying Vehicles / Tractors 16T	
Make and Model*	Isuzu GC	
Body Type*	Goods Carrying Vehicle	
Tonnage*	16.0	
Registration Mark*	TBA	
Engine Number*	987654321	
Chassis Number*	987656789	
Sum Insured*	300000	

Hire Purchase Owner Name 

7. Fill in the Registration Mark, Engine Number and Chassis Number

If the Registration Mark is not yet available, please input **TBA or To Be Advised**

填寫登記號碼、引擎號碼和車身底盤號碼，如未有登記號碼，請填上 **TBA 或 To Be Advised**

C: Issue Cover Note 簽發臨時保單

Driver Details

Driver Type* Insured Driver 8
Full Name of Driver* Choy Tung Chun
Nature of Business* Transport / Logistic Company 9
Date of Birth (DD/MM/YYYY)* 20/06/1970
HKID / Passport No* D735214(0)
No of Years Licensed* 2 years or more 10
Have you had any traffic offences in the last 3 years?* less than 10 points deducted 11

12 [Add](#) [Clear](#)

Store / Warehouse Gen. Goods
 Mini Mkt/Grocery/Convenience
 Plastic Goods Factory / Dealer
 Paper/Product Factory / Dealer
 Garment Manufacturer / Dealer
 Electronic Goods Mfg / Dealer
 Artist
 Technicians
 Civil Servant
 Motor Repairer
 Logistic Manager
 Transport / Logistic Company
 Mechanic
 Building Contractor

less than 2 years
 2 years or more

less than 10 points deducted
 10 or more points deducted

Driver Name	Driver Type	Occupation	Date of Birth	HKID	Yrs Licensed	Offences
Choy Tung Chun	Insured Driver	Transport / Logistic Company	20/06/1970	D735214(0)	2 years or more	less than 10 points deducted

8. Select **Driver Type** 選擇司機類別

9. Select **Nature of Business** 選擇公司業務性質

10. Select driver's **Number of Years Licensed**

選擇司機的 **Number of Years Licensed**

If the driver has licensed for less than 1 year, the policy will be referred to the underwriter

如司機駕駛經驗少於一年，保單會被轉介至核保同事跟進

11. Select **driver's traffic offences** in the last 3 years

選擇過去 3 年司機被扣除的分數

If the driver has been deducted for more than 9 points, the policy will be referred to the underwriter

如司機被除 9 分以上，保單會被轉介至核保同事跟進

12. Click **"Add"** to add the driver's information

點擊 **"Add"** 將司機資料加入保單

C: Issue Cover Note 簽發臨時保單

No Claims Discount

No Claims Discount ⓘ

Previous Insurer* ⓘ

Previous Policy No* ⓘ

13

Cover Note and CI

Effective Date* ⓘ

Effective Time* ⓘ

Optional Extensions

Guangdong Province Extension ⓘ

Extend Crane Liability to ⓘ

Extend Tailgate Liability to ⓘ

Excess

Section 1

Accidental Damage Excess	HKD <input type="text" value="15,000"/>	<input type="text" value="3"/> % of SI ⓘ
Theft Excess	HKD <input type="text" value="15,000"/>	
Young Driver Excess	HKD <input type="text" value="10,000"/>	
Inexperienced Driver Excess	HKD <input type="text" value="10,000"/>	
Third Party Property Damage Excess	HKD <input type="text"/>	

Section 2

HKD <input type="text"/>	ⓘ
HKD <input type="text"/>	ⓘ
HKD <input type="text" value="10,000"/>	
HKD <input type="text" value="10,000"/>	
HKD <input type="text" value="15,000"/>	

[Clauses \(8\)](#) [General pages](#)

Premium Breakdown:	Annual Premium ⓘ	Premium Due	Levy	Total Due
Commercial Motor	\$8,641.67	\$8,641.67	\$262.71	\$8,904.38
Total	\$8,641.67	\$8,641.67	\$262.71	\$8,904.38

14

CALCULATE PREMIUM >

Total Premium **8,904.38** HKD

15

NEXT >

C: Issue Cover Note 簽發臨時保單

13. Fill in the No Claim Discount information (if any)
填寫無索償折扣資料 (如有)

14. Click 點擊 

15. Click 點擊 

Review

Period of Insurance 01 November 2018 to 31 October 2019

Non-Situation Dependent Risks

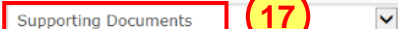
Cover Sections

[Expand All](#) / [Collapse All](#)

	Annual Premium	Premium Due	Levy	Total Due	
Commercial Vehicle: 2014 Isuzu GC	\$8,641.67	\$8,641.67	\$262.71	\$8,904.38	Premium Varied
Sub-Totals	\$8,641.67	\$8,641.67	\$262.71	\$8,904.38	
	Annual Premium	Premium Due	Levy	Total Due	
Policy Total	\$8,641.67	\$8,641.67	\$262.71	\$8,904.38	

Important note: Please attach evidence of previous insurance no claim discount entitlement

Attachments

Applicable to 

File Name/ Description

File







Applicable to	Date Attached	Description	File Name	Size in MB
---------------	---------------	-------------	-----------	------------

16. Review **Premium Breakdown** for all sections
檢閱保費項目明細

17. Select **Supporting Documents** from Applicable to
從 Applicable to 中選擇 **Supporting Documents**

18. Fill in the **File Name/Description** and click "**BROWSE**" to find the file
填寫**文件名稱/描述**，然後點擊 "**BROWSE**"去找尋文件

19. Click  insert the document (Personal: insured ID copy or Corporate: BR copy),
max file size is 4MB each
點擊  加入附件 (附件包括 Personal: 身份證副本或 Corporate: 商業登記副本)
每個檔案最大為 4MB)



C: Issue Cover Note 簽發臨時保單**Attachments**Applicable to

File Name/ Description

File

BROWSE

ATTACH

Applicable to	Date Attached	Description	File Name	Size in MB		
Commercial Motor	16/09/2018	ID Card	ID.docx	0.01		

20

NEXT >

20. Repeat steps 17 to 19 until attached all supporting document and then click **NEXT >**
重複步驟 17 至 19，直至加入所有文件，然後點擊 **NEXT >**

C: Issue Cover Note 簽發臨時保單

Motor Vehicle Insurance

PRINT

Claims and Insurance History Questions

In the Last 3 years?

Have you had any claims/losses?

☐ Yes☒ No

21

Have you

Ever been disqualified from driving in the past three years?

☐ Yes☒ No

22

Ever been declined insurance or had your motor insurance cancelled or renewal refused by any insurer in the past three years?

☐ Yes☒ No

23

Three underwriting questions are required

客戶須回答 3 條核保問題

21. Have you had any claims/losses in the last 3 years? (System default "No")

在過去 3 年您是否有索賠記錄？(系統已預設是 "No")

If you had Claims Record in the past 3 years, please fill in the details and the policy will be referred to the underwriter.

如您在過去 3 年有索賠記錄，請輸入相關資料及保單會被轉介至核保同事跟進。

22. Have you ever been disqualified from driving in the past 3 years?

在過去 3 年您曾否有被吊銷駕駛執照？

If you had been disqualified from driving in the past 3 years, please fill in the details and the policy will be referred to the underwriter.

如您在過去 3 年曾被吊銷駕駛執照，請您輸入相關資料及保單會被轉介至核保同事跟進。

23. Have you ever been declined insurance or had your motor insurance cancelled or renewal refused by any insurer in the past 3 years?

在過去 3 年您是否有被拒絕投保紀錄、取消保單或被其他保險公司拒絕續保？

If you had been declined insurance or had your motor insurance cancelled or renewal refused by any insurer in the past 3 years, please fill in the details and the policy will be referred to the underwriter.

如您有被拒絕投保紀錄、取消保單或被其他保險公司拒絕續保，請您輸入相關資料及保單會被轉介至核保同事跟進。

C: Issue Cover Note 簽發臨時保單

Customer Details

SEARCH FOR EXISTING CUSTOMER

Customer Type* Personal

☐ Check the box if Customer Details are the same as the Insured Driver details

Name* CHOY TUNG CHUN

ID Number* D735214(0)

Gender* Male

Date of Birth* 20/06/1970

Nationality HONG KONG

Home Telephone Number

Business Telephone Number

Mobile Number 92233444

Fax Number

Email Address Alex.choy@email.com

Unit / Floor Number FLAT A, 33F

Building Number and Name TALL TOWER

Street Number and Name* 100 LONG ROAD

District QUARRY BAY

Country* HONG KONG

CLEAR

Total Premium **8,904.38** HKD

SAVE PENDING ISSUE QUOTE REFER TO UNDERWRITER **ISSUE COVER NOTE**

ISSUE POLICY

1	Save Pending	To save the input information for future use. 先儲存已輸入之資料以待日後處理。
2	Refer to Underwriter	The underwriter will review the case manually. 核保同事會因應投保之風險作出檢視及核保。

24. Check the box ☐ to copy the details of the Insured Driver to **Named Driver**

請勾選方格 ☐ 去複製受保司機資料至 **記名司機**

25. Enter customer's information in the fields provided (* is compulsory)

按表單內容輸入客戶的資料 (* 必須填寫)

26. Click 點擊 **ISSUE COVER NOTE**

C: Issue Cover Note 簽發臨時保單

Customer Details

Confirmation

You are about to issue a policy contract with QBE. Are you sure that you have checked all information and that it is correct?
Clicking on 'Yes' will mean that all information entered is accurate and that a policy document will be issued and your Agent account debited for the premium payable.
Click on 'No' if you have not checked the accuracy of all information entered or if you have incorrectly selected the Issue Policy option.

NO

27

YES

Nationality

HONG KONG

Home Telephone Number

Business Telephone Number

Mobile Number

92233444

Fax Number

Email Address

Unit / Floor Number

FLAT A, 33F

Building Number and Name

TALL TOWER

Street Number and Name*

100 LONG ROAD

District

QUARRY BAY

Country*

HONG KONG

CLEAR

Total Premium 7,902.16 HKD

27. Click  to **Issue Cover Note** (the premium will be debited from Agent's account)
 點擊  去 **Issue Cover Note** (保費會於 Agent 的賬戶中記賬結算)

C: Issue Cover Note 簽發臨時保單

Hello Lee Wai Ming 2 | [My Profile](#) | [Help](#) | [Logout](#)

Find

Quote by Number

Q

Quote

Policy Administration

Product Details

Portfolio & Reports

Tools

[Home](#) / [Policy Header](#)

Policy and risk details based on effective date of 01/11/2018

Policy

Insurance Details

Policy No: V0294033 Policy Type: Motor Vehicle Insurance (MVA) Insured: CHOY TUNG CHUN Address: FLAT A, 33F TALL TOWER 100 LONG ROAD QUARRY BAY Agent: Lee Wai Ming Cover Note Expiry Date: 01/12/2018	Policy Status: Cover Note Policy of Insurance: 01/11/2018 to 31/10/2019 Wording: UWD.PVCM.V2-2.6.1606 SP Attn Code: Branch: 01 Campaign Code:
---	--


[Risks](#)
[Transaction History](#)
28
29

Transaction Type (expand / collapse)	Effective Date	Email	Document Type
Cover Note Issue	01/11/2018	✉	<div style="border: 1px solid red; padding: 2px; color: #0056b3; font-size: small;">Cover Note 16 September, 2018 23:56</div>

CHECK FOR DOCUMENTS
POLICY OPTIONS▲

28. Click **Documents** to displays the policy document
 點擊 **Documents** 顯示保單之文件
29. Click on the document name link to view the document
 點擊文件名稱連結去檢閱文件
30. Click **Email** to send the policy documents to customer
 點擊 **Email** 將保單文件以電郵發送給客戶

C: Issue Cover Note 簽發臨時保單



Qnect

Hello Lee Wai Ming | [My Profile](#) | [Help](#) | [Logout](#)

Find

Quote by Number Q

Home
Quote
Policy Administration
Product Details
Portfolio & Reports
Tools

Correspondence
V0294033MVA

From: Lee Wai Ming
Cover Note Issue

31
To*

Alex.choy@email.com

i

Cc

Bcc

32
Subject

Customer CHOY TUNG CHUN

Text

33

Attachments

☒
Cover Note 16 September, 2018 23:56

34

35
SEND

Message Sent

Your e-mail has been sent.
 36

OK

31. To – System will default the customer email address (can add other email addresses, using semicolon (;) to separate email addresses)
 致 – 系統會預設客戶的電郵地址 (可利用分號 (;) 相隔電郵地址以加入其他電郵地址)

32. Subject – System will default the Subject to be the name of customer but you may enter your own subject
 郵件標題 – 系統會預設郵件標題為客戶的姓名，惟您可以輸入自定的郵件標題

33. Text – System will default the content but you may enter your own content
 郵件內容 – 系統會預設郵件內容，惟您可以輸入自定的內容

34. Attachments – System will default a Policy Document such to be sent and you may uncheck the box besides the document's name if you do not want to send it
 附件文件 – 系統已預設附上相關文件，惟如該些文件是不需要，您可以剔除對應的文件方格

35. Click 點擊 SEND

36. A pop-up message will show that the email has been sent and then click OK
 頁面會有顯示電子郵件已發送，然後點擊 OK

Part D

Issue Policy

簽發保單

D: Issue Policy 簽發保單

There are two options of finding an existing Cover Note in Qnect in order to issue the Policy:
Qnect

有兩種途徑去尋找現有的臨時保單去進行簽發保單:

Option One

第一種方法

Use **Find** option (top right-hand side of the Qnect Home page)

利用 Qnect 頁面右上方的 **Find** 功能

Or 或

Option Two

第二種方法

Use **Policy Administration** – Find a Policy / Cover Note

利用 **Policy Administration** 中的 Find a Policy / Cover Note 功能

Option One

第一種方法

To retrieve the record by using the **Cover Note Number** V0294033

輸入臨時保單號碼 (V0294033) 以取得資料第一種方法



a. Select **Policy / Cover Note by Number** from **Find** option
從 **Find** 中選擇 **Policy / Cover Note by Number**

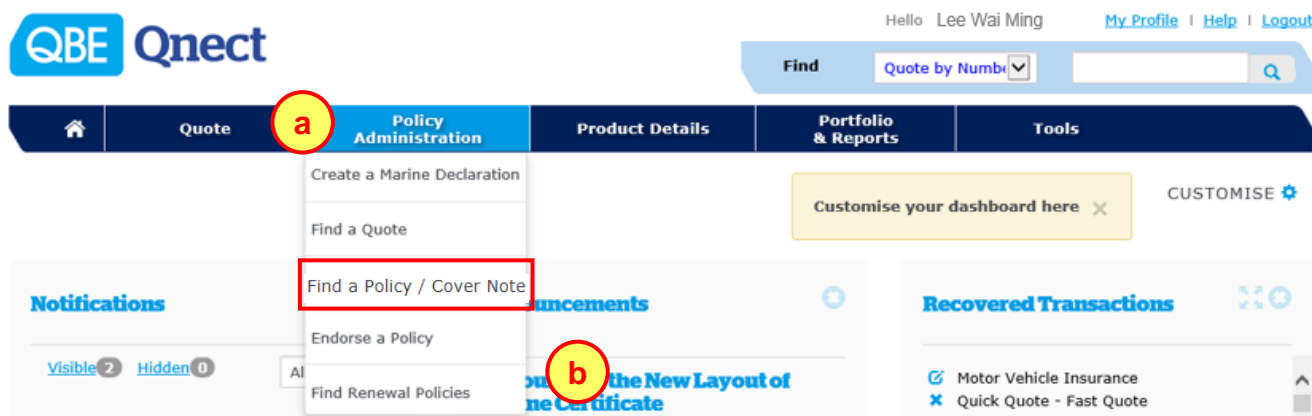
b. Enter Cover Note Number: **V0294033**
輸入臨時保單號碼: **V0294033**

c. Click 點擊 

D: Issue Policy 簽發保單

Option Two 第二種方法

To retrieve the records by using the Customer or Cover Note Number
輸入客戶資料或臨時保單號碼以取得資料

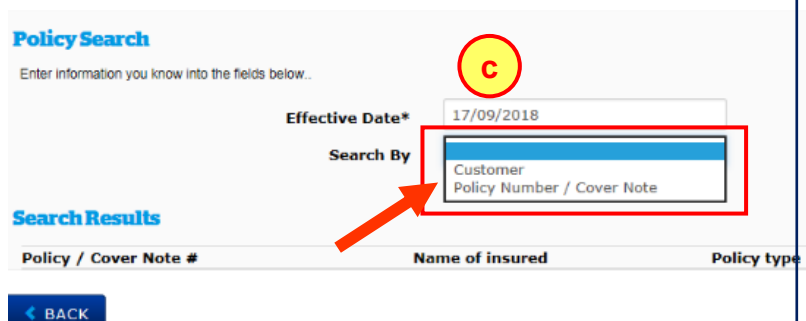


- Choose **Policy Administration** from the main menu
從主頁面選單中，選擇 **Policy Administration**
- Select **Find a Policy / Cover Note**
選擇 **Find a Policy / Cover Note**
- Input Policy **Effective Date**
輸入保單生效日期

You can either search by
您可選擇利用

- Customer (Name / ID Number)
客戶 (姓名 / 身份證號碼)
- Policy Number / Cover Note
保單號碼 / 臨時保單號碼

to retrieve the policy information
去取得保單資料



The screenshot shows the 'Policy Search' form. The 'Effective Date*' field is set to '17/09/2018'. The 'Search By' dropdown menu is open, showing 'Customer' and 'Policy Number / Cover Note' options. A red box and a red circle 'c' highlight the 'Policy Number / Cover Note' option. An orange arrow points to the 'Policy Number / Cover Note' option. The 'Search Results' table is visible below the form.

D: Issue Policy 簽發保單

Example 1: Use Option Two and Search By – Customer (Name / ID Number)

例子一：選擇第二種方法，並利用客戶姓名 / 身份證號碼去搜尋

Policy

Policy Search

Enter information you know into the fields below..

Search By i

Product Type

ii

Search Results

Policy #	Name of insured	Policy type	Status	Expires	Links
----------	-----------------	-------------	--------	---------	-------

- i. Search by – **Customer**
從搜尋選項中，選擇 **Customer**

- ii. Click 點擊

- iii. Select Customer Type – Personal
從 Customer Type 中選擇 Personal

- iv. Select Search By – Name
從 Search By 中選擇 Name

Select Search By – ID Number
從 Search By 中選擇 ID Number

- v. Enter Name – Choy Tung Chun
輸入客戶姓名 – Choy Tung Chun

Enter ID Nmber – A735214(0)
輸入 ID Number – A735214(0)

- vi. Click 點擊

Search Customer iii

Customer Type

Search By iv v

Name

vi

Search Customer iii

Customer Type

Search By iv

ID Number v

vi

D: Issue Policy 簽發保單

Example 2: Use Option Two and Search By – Policy Number / Cover Note

例子二：選擇第二種方法，利用保單號碼 / 臨時保單號碼去搜尋

[Home](#) / [Policy Search](#)

Policy

Policy Search

Enter information you know into the fields below..

Effective Date*

Search By

Policy Number*

Search Results

Policy #	Name of insured	Policy type	Status	Expires	Links
V0283717	CHOY TUNG CHUN	Motor	Cover Note	30/06/2019	

- i. Search by – **Policy Number / Cover Note**
從搜尋選項中，選擇 **Policy Number / Cover Note**
- ii. Enter Cover Note (V0294033)
輸入報價號碼 (V0294033)
- iii. Click 點擊
- iv. Click on the **Policy Number: V0294033** and go to the Policy details
點擊保單號碼: **V0294033** 去進入保單內容

D: Issue Policy 簽發保單

Policy

1

Insurance Details

Policy No: V0294033
Policy Type: Motor Vehicle Insurance (MVA)
Insured: CHOY TUNG CHUN
Address: FLAT A, 33F TALL TOWER 100 LONG ROAD QUARRY BAY
Agent: Lee Wai Ming
Cover Note Expiry Date: 01/12/2018

Policy Status: Cover Note
Policy of Insurance: 01/11/2018 to 31/10/2019
Wording: UWD.PVCM.V2-2.6.1606
SP Attn Code:
Branch: 01
Campaign Code:

[Risks](#) [Transaction History](#) [Documents](#)

Section	Risk	Location / Type of Business	Commence	Terminated
Commercial Motor	001	HONG KONG	01/11/2018	

Edit

View

POLICY OPTIONS▲

2

3

1. **Policy Details** main page
Policy Details 頁面
2. Click 點擊 **POLICY OPTIONS▲**
3. Click **Edit** to add back outstanding information
點擊 **Edit** 補回投保資料
4. Click **the car link** in the in Cover Sections to fill in the Registration Mark
在 Cover Sections 中點擊 **汽車連結** 去輸入車牌的資料

Motor Vehicle Insurance

CUSTOMER VIEW - ON

PRINT

Review

Period of Insurance 01 November 2018 to 31 October 2019

Non-Situation Dependent Risks

Cover Sections

4

Expand All / Collapse All	Annual Premium	Premium Due	Levy	Total Due	
Commercial Vehicle: 2014 Isuzu GC	\$8,641.67	\$8,641.67	\$262.71	\$8,904.38	MODIFIED
Sub-Totals	\$8,641.67	\$8,641.67	\$262.71	\$8,904.38	
	Annual Premium	Premium Due	Levy	Total Due	
Policy Total	\$8,641.67	\$8,641.67	\$262.71	\$8,904.38	

D: Issue Policy 簽發保單

Vehicle Details

Cover Type* Comprehensive 1

Use of Vehicle* Goods Carrying Vehicle 1

Vehicle Description* 2014 Isuzu GC Goods Carrying Vehicles / Tractors 16T 1 SEARCH FOR VEHICLE

Make and Model* Isuzu GC 1

Body Type* TBA 1

Tonnage* 16.0 1

Registration Mark* TT1234 5

Engine Number* 987654321 1

Chassis Number* 987656789 1

Sum Insured* 300000

Hire Purchase Owner Name

Excess

Section 1

Accidental Damage Excess HKD 15,000 3 % of SI 1

Theft Excess HKD 15,000 1

Young Driver Excess HKD 10,000

Inexperienced Driver Excess HKD 10,000

Third Party Property Damage Excess HKD

Section 2

HKD 1

HKD 1

HKD 10,000

HKD 10,000

HKD 15,000

[Clauses \(8\)](#) [General pages](#)

Premium Breakdown:	Annual Premium 1	Premium Due	Levy	Total Due
	\$8,641.67	\$8,641.67	\$262.71	\$8,904.38

6

[CALCULATE PREMIUM >](#)
Total Premium 8,904.38 HKD

7

[NEXT >](#)

5. Edit to add back outstanding information
補回投保資料

6. Click 點擊 [CALCULATE PREMIUM >](#)

7. Click 點擊 [NEXT >](#)

D: Issue Policy 簽發保單

Review

Period of Insurance 01 November 2018 to 31 October 2019

Non-Situation Dependent Risks

Cover Sections

[Expand All](#) / [Collapse All](#)

	Annual Premium	Premium Due	Levy	Total Due	
Commercial Vehicle: 2014 Isuzu GC	\$8,641.67	\$8,641.67	\$262.71	\$8,904.38	MODIFIED
Sub-Totals	\$8,641.67	\$8,641.67	\$262.71	\$8,904.38	
	Annual Premium	Premium Due	Levy	Total Due	
Policy Total	\$8,641.67	\$8,641.67	\$262.71	\$8,904.38	

Important note: Please attach evidence of previous insurance no claim discount entitlement

Attachments

Applicable to

File Name/ Description

File

BROWSE

ATTACH

8

Applicable to

Date Attached

Description

File Name

Size in MB

9

NEXT >

8. Click insert the document (the copies of completed and signed proposal form, vehicle registration document, no claim discount proof and all named drivers' ID and driving license) , please refer to page 25 - 26, Step 17 - 20 for more details

點擊 **ATTACH** 加入附件 (副本包括已完成及簽署的申請表、車輛登記文件、無索償折扣證明、所有記名司機之身份證及駕駛執照) · 詳情請參考 25 至 26 頁 · 步驟第 17 至 20

9. Click 點擊 **NEXT >**

D: Issue Policy 簽發保單

Customer Details

SEARCH FOR EXISTING CUSTOMER

Customer Type* Personal

☐ Check the box if Customer Details are the same as the Insured Driver details

Name* CHOY TUNG CHUN

ID Number* D735214(0)

Gender* Male

Date of Birth* 20/06/1970

Nationality HONG KONG

Home Telephone Number

Business Telephone Number

Mobile Number 92233444

Fax Number

Email Address Alex.choy@email.com

Unit / Floor Number FLAT A, 33F

Building Number and Name TALL TOWER

Street Number and Name* 100 LONG ROAD

District QUARRY BAY

Country* HONG KONG

CLEAR

Total Premium **8,904.38** HKD

11

SAVE PENDING ISSUE QUOTE REFER TO UNDERWRITER ISSUE COVER NOTE

ISSUE POLICY

uat182232-n20

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 [Privacy Policy](#) |
 [Contact Us](#)

10. Enter customer's information in the fields provided (* is compulsory)

按表單內容輸入客戶的資料 (* 必須填寫)

11. Click 點擊

ISSUE POLICY

D: Issue Policy 簽發保單

Customer Details

Confirmation

You are about to issue a policy contract with QBE. Are you sure that you have checked all information and that it is correct?
Clicking on 'Yes' will mean that all information entered is accurate and that a policy document will be issued and your Agent account debited for the premium payable.
Click on 'No' if you have not checked the accuracy of all information entered or if you have incorrectly selected the Issue Policy option.

NO


12

YES

Nationality	HONG KONG
Home Telephone Number	
Business Telephone Number	
Mobile Number	92233444
Fax Number	
Email Address	
Unit / Floor Number	FLAT A, 33F
Building Number and Name	TALL TOWER
Street Number and Name*	100 LONG ROAD
District	QUARRY BAY
Country*	HONG KONG
	CLEAR

12. Click **YES** to issue the policy (the premium will be debited from Agent's account)
點擊 **YES** 去簽發保單 (保費會於 Agent 的賬戶中記賬結算)


D: Issue Policy 簽發保單


Qnect

Hello Lee Wai Ming | [My Profile](#) | [Help](#) | [Logout](#)

Find

Quote by Number
Q

 Home
Quote
Policy Administration
Product Details
Portfolio & Reports
Tools

[Home](#) / [Policy Header](#)
Policy and risk details based on effective date of 01/11/2018

Policy

Insurance Details

Policy No: V0294033 Policy Type: Motor Vehicle Insurance (MVA) Insured: CHOY TUNG CHUN Address: FLAT A, 33F TALL TOWER 100 LONG ROAD QUARRY BAY Agent: Lee Wai Ming	Policy Status: In Force Policy of Insurance: 01/11/2018 to 31/10/2019 Wording: UWD.PVCM.V2-2.6.1606 SP Attn Code: 00 Branch: 01 Campaign Code:
--	---

[Risks](#)
[Transaction History](#)
Documents
13

Transaction Type (expand / collapse)	Effective Date	Email	Document Type
<div style="display: flex; align-items: center;"> <div style="width: 15px; height: 15px; background-color: #0072bc; border-radius: 50%; margin-right: 5px;"></div> New Business Issue </div>	01/11/2018	<div style="display: flex; align-items: center;"> <div style="width: 15px; height: 15px; background-color: #0072bc; border-radius: 50%; margin-right: 5px;"></div> 15 </div>	<div style="border-left: 2px solid red; padding-left: 10px; margin-left: 10px;"> <div style="border: 2px solid red; border-radius: 50%; padding: 2px 5px; color: red; font-weight: bold; margin-bottom: 5px;">14</div> <ul style="list-style-type: none"> Motor Certificate (TT1234) Schedule - Client Copy Schedule - Intermediary Copy Policy Wording Debit Credit Note - Client Copy Debit Credit Note - Intermediary Copy Cover Note 16 September, 2018 23:56 </div>

CHECK FOR DOCUMENTS

POLICY OPTIONS▲

13. Click **Documents** to displays the list of policy documents

點擊 **Documents** 顯示保單之相關文件

14. Click on the document name link to view the document

點擊文件名稱連結去檢閱文件

15. Click  **Email** to send the policy documents to customer

點擊  **Email** 將保單文件以電郵發送給客戶

D: Issue Policy 簽發保單

Correspondence

V0294033MVA

From: Lee Wai Ming

New Business Issue

16 To* Alex.choy@email.com

Cc

Bcc

17 Subject Customer CHOY TUNG CHUN

Text

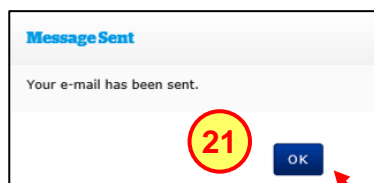
18

Attachments

- ☒ Motor Certificate (TT1234)
- ☒ Schedule - Client Copy
- ☐ Schedule - Intermediary Copy
- ☒ Policy Wording
- ☒ Debit Credit Note - Client Copy
- ☐ Debit Credit Note - Intermediary Copy
- ☐ Cover Note 16 September, 2018 23:56

19

Can add other email addresses 可加入其他電郵地址
e.g. Alex.choy@email.com; May.lee@email.com






21

OK


SEND

20

16. **To** – System will default the customer email address (can add other email addresses, using semicolon (;) to separate email addresses)
致 – 系統會預設客戶的電郵地址 (可利用分號 (;) 相隔電郵地址以加入其他電郵地址)
17. **Subject** – System will default the Subject to be the name of customer but you may enter your own subject
郵件標題 – 系統會預設郵件標題為客戶的姓名，惟您可以輸入自定的郵件標題
18. **Text** – You may enter your content
郵件內容 – 可以輸入自定的內容
19. **Attachments** – System will default some Policy Documents such as Debit Credit Note - Intermediary Copy to be sent and you may uncheck the box besides the document's name if you do not want to send it
附件文件 – 系統已預設附上一些相關文件(例如: Debit Credit Note - Intermediary Copy)，惟如該些文件是不需要，您可以剔除對應的文件方格
20. Click 點擊 
21. A pop-up message will show that the email has been sent and then click 
- 頁面會有顯示電子郵件已發送，然後點擊 

D: Issue Policy 簽發保單

Subject Customer CHOY TUNG CHUN

Attached  Schedule - Client Copy-9656808.pdf (60 KB);  Debit Credit Note - Client Copy-9656809.pdf (39 KB);
 Policy Wording-9656812.pdf (390 KB);  Motor Certificate (TBA)-9656813.pdf (53 KB)

Dear CHOY TUNG CHUN,

22

Thank you for insuring with QBE. We advise that you read through the Policy Wording.

If you have any enquiries on the coverage, Policy Schedule and Policy Wording, please do not hesitate to contact your intermediary

Please find your policy documents attached.

Made possible



22. Customer will receive a **Policy Documents** email

客戶會收到保單文件電郵

Part E

Endorsement

更改保單

E: Endorsement 更改保單

There are two options of finding an existing Policy in Qnect in order to proceed the Endorsement:
Qnect

有兩種途徑去尋找現有的保單去進行更改保單:

Option One

第一種方法

Use **Find** option (top right-hand side of the Qnect Home page)

利用 Qnect 頁面右上方的 **Find** 功能

Or 或

Option Two

第二種方法

Use **Policy Administration** – Endorse a Policy

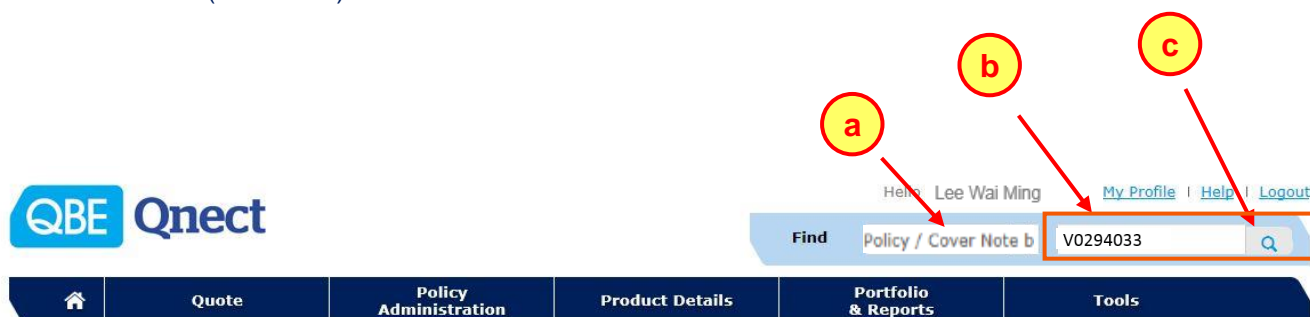
利用 **Policy Administration** 中的 Endorse a Policy


Option One

第一種方法

To retrieve the record by using the **Policy Number** V0294033

輸入保單號碼 (V0294033) 以取得資料

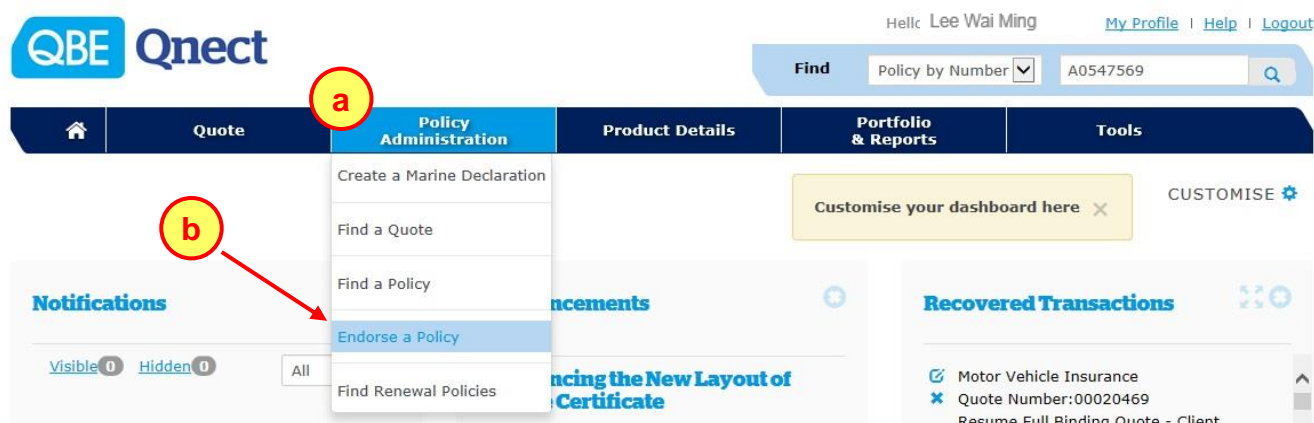


- a. Select **Policy / Cover Note by Number** from **Find** option
從 **Find** 中選擇 **Policy / Cover Note by Number**
- b. Enter Policy Number: **V0294033**
輸入保單號碼: **V0294033**
- c. Click 點擊 

E: Endorsement 更改保單

Option Two 第二種方法

To retrieve the records by using the Customer or Policy Number
輸入客戶資料或保單號碼以取得資料



a. Choose **Policy Administration** from the main menu
從主頁面選單中，選擇 **Policy Administration**

01/07/2018

b. Select **Endorse a Policy**
選擇 **Endorse a Policy**

c. Input Policy **Effective Date**
輸入保單生效日期

You can either search by
您可選擇利用

- Customer (Name / ID Number)
客戶 (姓名 / 身份證號碼)
- Policy Number / Cover Note
保單號碼 / 臨時保單號碼

to retrieve the policy information
去取得保單資料

The screenshot shows the 'Policy Search' form. It has a header 'Policy Search' and a sub-header 'Enter information you know into the fields below..'. There are two main input fields: 'Effective Date*' and 'Search By'. The 'Effective Date*' field contains the date '17/09/2018'. The 'Search By' dropdown menu is open, showing two options: 'Customer' and 'Policy Number / Cover Note'. A red circle 'c' is placed over the 'Effective Date*' field. A red arrow points from the 'Search By' dropdown menu to the 'Effective Date*' field.

E: Endorsement 更改保單

Example 1: Use Option Two and Search By – Customer (Name / ID Number)

例子一：選擇第二種方法，並利用客戶姓名 / 身份證號碼去搜尋

Policy

Policy Search

Enter information you know into the fields below..

Search By **i**

Product Type

ii SEARCH FOR EXISTING CUSTOMER

Search Results

Policy #	Name of insured	Policy type	Status	Expires	Links
----------	-----------------	-------------	--------	---------	-------

- i. Search by – Customer
從搜尋選項中，選擇 Customer
- ii. Click 點擊 SEARCH FOR EXISTING CUSTOMER
- iii. Select Customer Type – Personal
從 Customer Type 中選擇 Personal
- iv. Select Search By – Name
從 Search By 中選擇 Name

Select Search By – ID Number
從 Search By 中選擇 ID Number
- v. Enter Name – Choy Tung Chun
輸入客戶姓名 – Choy Tung Chun

Enter ID Number – A735214(0)
輸入身份證號碼 – A735214(0)
- vi. Click 點擊 SEARCH

Search Customer **iii**

Customer Type

Search By **iv**

Name **v**

vi SEARCH

Search Customer **iii**

Customer Type

Search By **iv**


ID Number **v**

vi SEARCH

E: Endorsement 更改保單

Example 2: Use Option Two and Search By – Policy Number / Cover Note

例子二：選擇第二種方法，利用保單號碼 / 臨時保單號碼去搜尋


[Quote](#)
[Policy Administration](#)
[Product Details](#)
[Portfolio & Reports](#)
[Tools](#)

[Home](#) / [Policy Search](#)

Policy

Policy Search

Enter information you know into the fields below..



Effective Date*
17/09/2018

Search By
Policy Number / Cover Note

Policy Number*
V0294033

SEARCH

Search Results

Policy / Cover Note #	Name of insured		Status	Cover Note Expires	Links
V0294033	CHOY TUNG CHUN	Motor Vehicle Insurance (MVA)	In Force	31/10/2019	 

- i. Search by – **Policy Number / Cover Note**
從搜尋選項中，選擇 **Policy Number / Cover Note**
- ii. Enter Policy Number (V0294033)
輸入保單號碼 (V0294033)
- iii. Click 點擊 
- iv. Click on the **Policy Number: V0294033** and go to the Policy details
點擊保單號碼: **V0294033** 去進入保單內容

E: Endorsement 更改保單

[Home](#) / [Policy Header](#)

Policy and risk details based on effective date of 01/11/2018

Policy

Insurance Details

Policy No: V0294033
Policy Type: Motor Vehicle Insurance (MVA)
Insured: CHOY TUNG CHUN
Address: FLAT A, 33F TALL TOWER 100 LONG ROAD QUARRY BAY
Agent: Lee Wai Ming

Policy Status: In Force
Policy of Insurance: 01/11/2018 to 31/10/2019
Wording: UWD.PVCM.V2-2.6.1606
SP Attn Code: 00
Branch: 01
Campaign Code:

[Risks](#)

[Transaction History](#)

[Documents](#)

Section	Risk	Location / Type of Business	Commence	Terminated
No risks are active based on the effective date of inquiry. Click here to inquire based on Inception Date of the policy.				

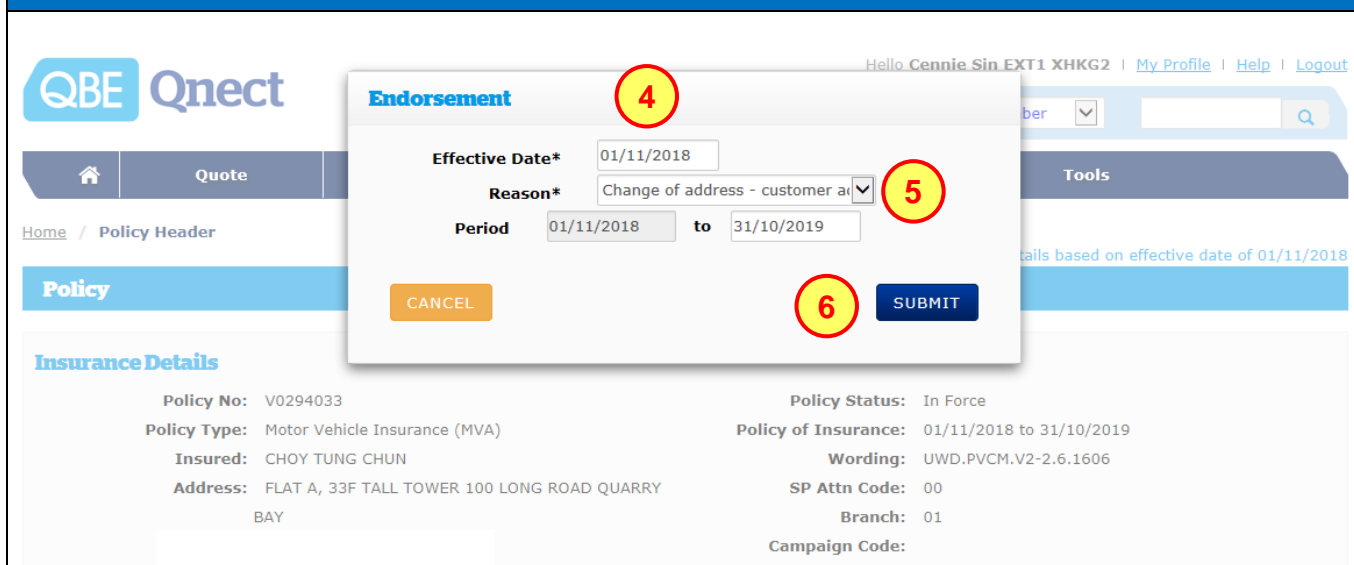
Endorsement

[View Policy](#)

POLICY OPTIONS

1. Insurance Details main page
保險內容頁面
2. Click 點擊 **POLICY OPTIONS**
3. Select Endorsement
選擇 Endorsement

E: Endorsement 更改保單



The screenshot shows the Qnect user interface for the 'Endorsement' section. A modal window titled 'Endorsement' is open, displaying the following fields:

- Effective Date***: 01/11/2018 (Callout 4)
- Reason***: Change of address - customer address (Callout 5)
- Period**: 01/11/2018 to 31/10/2019 (Callout 6)

At the bottom of the modal are two buttons: 'CANCEL' and 'SUBMIT'.

In the background, the 'Insurance Details' section is visible, showing:

- Policy No:** V0294033
- Policy Type:** Motor Vehicle Insurance (MVA)
- Insured:** CHOY TUNG CHUN
- Address:** FLAT A, 33F TALL TOWER 100 LONG ROAD QUARRY BAY
- Policy Status:** In Force
- Policy of Insurance:** 01/11/2018 to 31/10/2019
- Wording:** UWD.PVCM.V2-2.6.1606
- SP Attn Code:** 00
- Branch:** 01
- Campaign Code:**

- System will default system date as Endorsement **Effective Date** but you can change it according to customer's needs.

系統已預設修改保單之**生效日期**為即日，惟您可以根據客戶的實質需要去改變

- Select Endorsement Reason (e.g. Change of address - customer address)
選擇修改保單原因 (e.g. Change of address - customer address)

- Click 點擊 **SUBMIT**

E: Endorsement 更改保單

Review

Period of Insurance 01 July 2018 to 30 June 2019

Non-Situation Dependent Risks

Cover Sections

Expand All / Collapse All

7











	Annual Premium	Premium Due	Levy	Total Due
Commercial Vehicle: 2014 Isuzu GC	\$19,437.00	\$0.00	\$0.00	\$0.00
Sub Totals	\$19,437.00	\$0.00	\$0.00	\$0.00
	Annual Premium	Premium Due	Levy	Total Due
Policy Total	\$19,437.00	\$0.00	\$0.00	\$0.00

7. Click **the car link** in Cover Sections to amend the driver's information
 在 Cover Sections 中點擊**汽車連結**去輸入司機的資料

8

MODIFY

Vehicle Details

Cover Type*	Comprehensive	
Use of Vehicle*	Goods Carrying Vehicle	
Vehicle Description*	2014 Isuzu GC Goods Carrying Vehicles / Tractors 16T	
Make and Model*	Isuzu GC	
Body Type*	TBA	
Tonnage*	16.0	
Registration Mark*	SL2531	
Engine Number*	123456789	
Chassis Number*	234567890	
Sum Insured*	500000	
Hire Purchase Owner Name		

8. Click 點擊 **MODIFY**











E: Endorsement 更改保單

File Name/ Description

File

BROWSE

ATTACH

Applicable to	Date Attached	Description	File Name	Size in MB		
Commercial Motor	17/09/2018	ID Card	ID Card.pdf	0.08		
Commercial Motor	17/09/2018	Driving License	Driving License.pdf	0.08		
Commercial Motor	17/09/2018	NCD Proof	NCD Proof.pdf	0.08		
Commercial Motor	17/09/2018	VRD	Vehicle Registration Document.pdf	0.08		
Commercial Motor	17/09/2018	Application Form	Application Form.pdf	0.08		

9

NEXT >

9. Click 點擊

NEXT >

Customer Details

Customer Type*

Name*

ID Number*

Gender*

Date of Birth*

Nationality

Home Telephone Number

Business Telephone Number

Mobile Number

Fax Number

Email Address

Unit / Floor Number

Building Number and Name

10

District

Country*

Endorsement has been successfully issued.

12

OK

Total Premium **0.00** HKD

REFER TO UNDERWRITER

ISSUE COVER NOTE

ISSUE ENDORSEMENT

11

10. Edit the correct information
填寫正確資料

11. Click 點擊

ISSUE ENDORSEMENT

12. Click 點擊

OK

E: Endorsement 更改保單

Policy

Insurance Details

Policy No: V0294033
Policy Type: Motor Vehicle Insurance (MVA)
Insured: CHOY TUNG CHUN
Address: FLAT A, 33F TALL TOWER 1000 LONG ROAD
 QUARRY BAY
Agent: Lee Wai Ming

Policy Status: In Force
Policy of Insurance: 01/11/2018 to 31/10/2019
Wording: UWD.PVCM.V2-2.6.1606
SP Attn Code: 00
Branch: 01
Campaign Code:

[Risks](#) [Transaction History](#) [Documents](#)

13

Transaction Type (expand / collapse)	Effective Date	Email	Document Type
Endorsement Issue	01/11/2018	✉	Motor Certificate (TT1234) Schedule - Client Copy Schedule - Intermediary Copy Endorsement Note - Client Copy
New Business Issue	01/11/2018	✉	Motor Certificate (TT1234) Schedule - Client Copy Schedule - Intermediary Copy Policy Wording Debit Credit Note - Client Copy Debit Credit Note - Intermediary Copy Cover Note 16 September, 2018 23:56

15

14

CHECK FOR DOCUMENTS

POLICY OPTIONS▲

13. Click **Documents** to displays the list of endorsement related documents

點擊 **Documents** 顯示 endorsement 之相關文件

14. Click on the document name link to view the document

點擊文件名稱連結去檢閱文件

15. Click  **Email** to send the endorsement documents to customer

點擊  **Email** 將更改保單文件以電郵發送給客戶

E: Endorsement 更改保單

Correspondence

VO294033MVA

From: Lee Wai Ming

Endorsement Issue

16 To* Alex.choy@email.com ⓘ

17 Cc

Bcc

17 Subject Customer CHOY TUNG CHUN

Text

18

Attachments

- ☒ Motor Certificate (TT1234)
- ☒ Schedule - Client Copy
- ☐ Schedule - Intermediary Copy
- ☒ Endorsement Note - Client Copy

19

Can add other email addresses 可加入其他電郵地址
e.g. Alex.choy@email.com; May.lee@email.com

Message Sent

Your e-mail has been sent.

21

OK

SEND

20

16. **To** – System will default the customer email address (can add other email addresses, using semicolon (;) to separate email addresses)
致 – 系統會預設客戶的電郵地址 (可利用分號 (;) 相隔電郵地址以加入其他電郵地址)
17. **Subject** – System will default the Subject to be the name of customer but you may enter your own subject
郵件標題 – 系統會預設郵件標題為客戶的姓名，惟您可以輸入自定的郵件標題
18. **Text** – System will default the content but you may enter your content
郵件內容 – 系統會預設郵件內容，惟您可以輸入自定的內容
19. **Attachments** – System will default some Policy Documents such as Schedule - Intermediary Copy to be sent and you may uncheck the box besides the document's name if you do not want to send it
附件文件 – 系統已預設附上一些相關文件(e.g. Schedule - Intermediary Copy)，惟如該些文件是不需要，您可以剔除對應的文件方格
20. Click 點擊 
21. A pop-up box will appear to confirm that the email has been sent and then click 
頁面會有顯示去確認電子郵件已發送，然後點擊 

Part F

Renew

續保

F: Renewal 續保

There are two ways of renewal:

Qnect 有兩個途徑去續保：

1. **Use One Click Renew for Non-Qnect Products**
利用 **One Click Renew for Non-Qnect Products**

Or 或

2. Use **Renewal** in Qnect for Qnect Products (Annual Travel, Domestic Helper Insurance and Motor Vehicle Insurance)
利用 **Renewal** in Qnect for Qnect Products (Annual Travel, Domestic Helper Insurance and Motor Vehicle Insurance)

Use One Click Renew for Non-Qnect Products

利用 **One Click Renew for Non-Qnect Products**

One Click Renew is only applicable to 19 Non-Qnect products listed below

One Click Renew 只適用於下列 19 項 Non-Qnect 的產品

1.	Motor Supersurance	11.	Shop Protection Package
2.	Commercial Motor Vehicle	12.	Golfers
3.	Motor Cycle Insurance	13.	Householders
4.	Commercial Fire Insurance	14.	Individual PA (Group)
5.	Domestic Fire	15.	Individual PA (Senior)
6.	House Owner and Household Comprehensive Insurance (Building & Contents)	16.	Travel Annual
7.	In-style Home Protection	17.	Travel China
8.	Travelon Annual Travel Insurance	18.	Property All Risks Insurance
9.	Personal Accident Protector	19.	Public Liability
10.	Office Protection Package		

Please note that One Click Renew is not applicable in below scenarios:

請注意，One Click Renew 並不適用於下列情況：

A policy 保單

- to be renewed with changes 續保時需要更改續保資料
- is a back dated renewal 是於現保單到期日之後才進行續保
- is insuring multiple risks and one of the risks has no premium 承保的風險並不是每項都收取保費
- with claim submitted for the immediate past year 於上一個年度有索償記錄

F: Renewal 續保 (One Click Renew for Non-Qnect Products)



Hello Li Siu Fai | [My Profile](#) | [Help](#) | [Logout](#)

Find



Quote

Policy Administration

Claims

Product Details

Portfolio & Reports

Tools

1. Select **Policy / Cover Note by Number** from **Find** option

從 **Find** 搜尋選項中，選擇保單號碼 / 臨時保單號碼

2. Enter Renewal Policy Number

輸入需要續約的保單號碼

3. Click 點擊

Renew Same

續保內容保持不變



Hello Li Siu Fai | [My Profile](#) | [Help](#) | [Logout](#)

Find



Quote

Policy Administration

Claims

Product Details

Portfolio & Reports

Tools

[Home](#) / [Policy Header](#)

Policy and risk details based on effective date of 10/04/2018

Policy

Insurance Details

Policy No: V0274666
Policy Type: Motor Vehicle Insurance (MVA)
Insured: Chan Tai Man
Address: Room 1532, Block C, Tall Building,
 322 King's Road, Quarry Bay, Hong Kong
Agent: Li Siu Fai

Policy Status: Awaiting Renewal
Policy of Insurance: 26/01/2018 to 25/01/2019
Wording: UWD.PVCM.V2-2.6.1606
SP Attn Code: 00
Branch: 01
Campaign Code:

[Risks](#)

[Transaction History](#)

[Documents](#)

[Claims](#)

Section	Risk	Location / Type of Business	Commence	Terminated
Private Motor	001	HONG KONG	26/01/2018	

6

Renewal

Lapse

New Claim

DISPLAY CURRENT TERM

POLICY OPTIONS

5

4. **Insurance Details** main page, policy status shows “Awaiting Renewal”

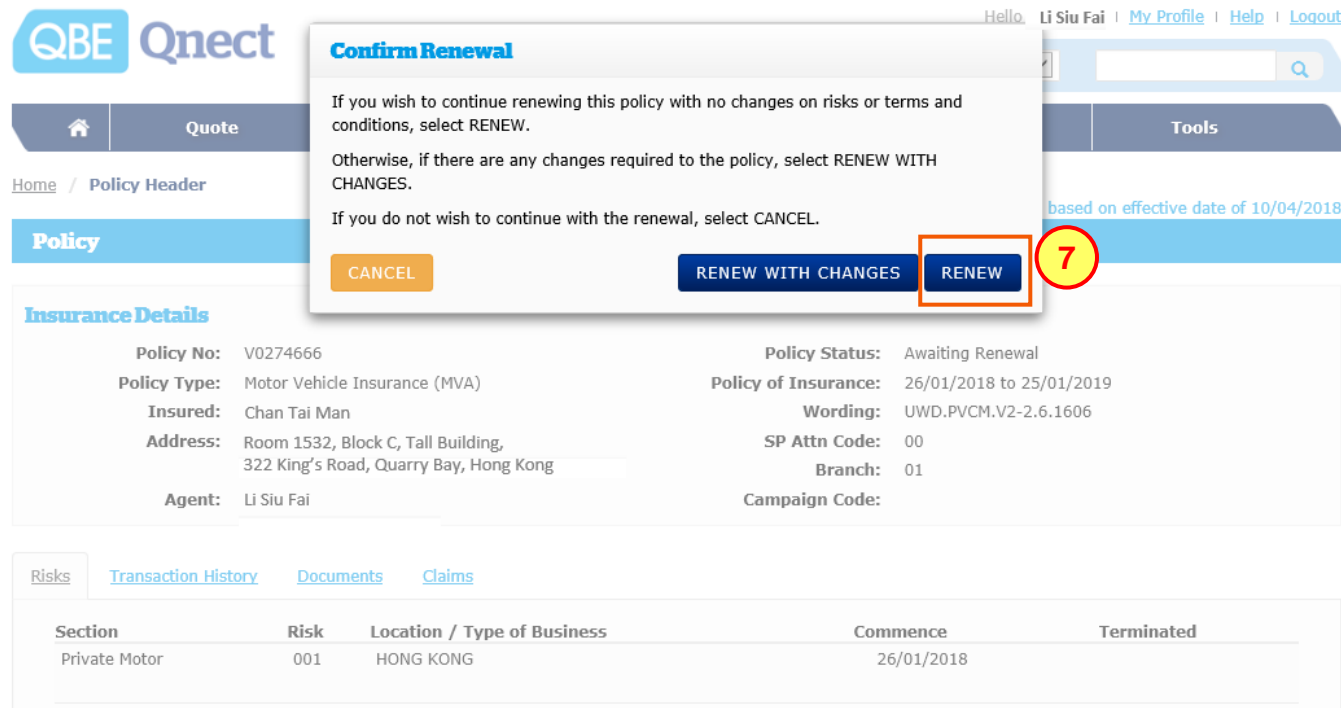
保險內容頁面，保單狀態顯示 “等待續約”

5. Click 點擊 **POLICY OPTIONS**

6. Select **Renewal**

選擇 **Renewal**

F: Renewal 續保 (One Click Renew for Non-Qnect Products)



Confirm Renewal

If you wish to continue renewing this policy with no changes on risks or terms and conditions, select RENEW.

Otherwise, if there are any changes required to the policy, select RENEW WITH CHANGES.

If you do not wish to continue with the renewal, select CANCEL.

Insurance Details

Policy No: V0274666	Policy Status: Awaiting Renewal
Policy Type: Motor Vehicle Insurance (MVA)	Policy of Insurance: 26/01/2018 to 25/01/2019
Insured: Chan Tai Man	Wording: UWD.PVCM.V2-2.6.1606
Address: Room 1532, Block C, Tall Building, 322 King's Road, Quarry Bay, Hong Kong	SP Attn Code: 00
Agent: Li Siu Fai	Branch: 01
	Campaign Code:

Section	Risk	Location / Type of Business	Commence	Terminated
Private Motor	001	HONG KONG	26/01/2018	

7. Click 點擊

RENEW

If no changes to be made for the renewal policy

如果沒有任何資料需要改變

Or 或

Click 點擊

RENEW WITH CHANGES

If change of information is required upon renewal, please refer to Page 62, Step 18

如果有任何資料需要改變，請參考第 62 頁，步驟 18

F: Renewal 續保 (One Click Renew for Non-Qnect Products)

[Home](#) / [Policy Header](#)

Policy and risk details based on effective date of 10/04/2018


Policy

Insurance Details



Policy No: V0274666
Policy Type: Motor Vehicle Insurance (MVA)
Insured: Chan Tai Man
Address: Room 1532, Block C, Tall Building,
322 King's Road, Quarry Bay, Hong Kong
Agent: Li Siu Fai

Policy Status: In Force
Policy of Insurance: 26/01/2018 to 25/01/2019
Wording: UWD.PVCM.V2-2.6.1606
SP Attn Code: 00
Branch: 01
Campaign Code:

[Risks](#) [Transaction History](#) [Documents](#) [Claims](#)

Transaction Type (expand / collapse)	Effective Date	Email	Document Type
<input checked="" type="radio"/> Renewal Issue	26/01/2018		Motor Certificate (MAK11) Schedule - Client Copy Schedule - Duplicate Schedule - Intermediary Copy Policy Wording Tax Invoice - Client Copy Tax Invoice - Intermediary Copy
New Business Issue	26/01/2017		

[CHECK FOR DOCUMENTS](#)
[POLICY OPTIONS](#)

- Insurance Details** main page, policy status shows “In Force”
保險內容頁面 · 保單狀態顯示 “生效”
- Click **Documents** to enter the Documents folder
點擊 **Documents** 進入文件夾頁面
- Document Type:** click on the document link (blue underline) to view the document
文件類別: 點擊文件名稱去檢閱文件
- Click  **Email** to send the policy wording and quotation to the policy holder
點擊  **Email** 將保單條款及報價單文件以電郵發送給保單持有人

F: Renewal 續保 (One Click Renew for Non-Qnect Products)

Home / Correspondence

Correspondence
VO274666MVA

Home
Quote
Policy Administration
Claims
Product Details
Portfolio & Reports
Tools

From: Li Siu Fai

To*

Cc

Bcc

Subject

Text

Renewal Issue

Attachments

☐ Motor Certificate (MAK11)

☐ Schedule - Client Copy

☐ Schedule - Duplicate

☐ Schedule - Intermediary Copy

☐ Policy Wording

☐ Tax Invoice - Client Copy

☐ Tax Invoice - Intermediary Copy

}

Message Sent

Your e-mail has been sent.

OK

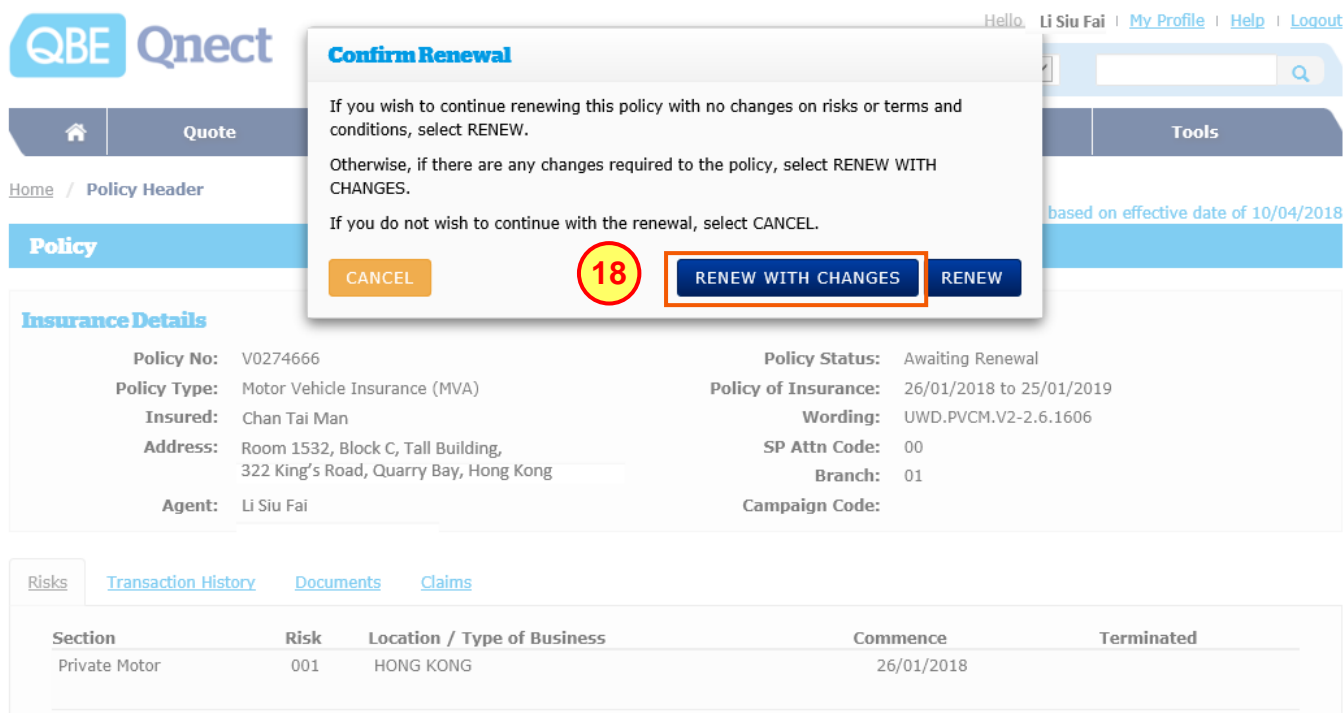
SEND

12. To - You may enter the email address of the policy holder (can add other email addresses, using semicolon (;) to separate email addresses)
電郵地址 - 您可以輸入保單持有人電郵地址 (可利用分號 (;) 相隔電郵地址以加入其他電郵地址)
13. Subject - You may enter your own subject
郵件標題 - 您可以輸入自定的郵件標題
14. Text - You may enter your content
郵件內容 - 可以輸入自定的內容
15. Attachments - You may check the box besides the document's name if you want to send it
附件文件 - 您可以勾選對應的文件方格去發送該些文件
16. Click 點擊 SEND
17. A pop-up message will show that the email has been sent and then click OK
頁面會有顯示電子郵件已發送，然後點擊 OK

[Back to Contents 返](#)

61 | Page

F: Renewal 續保 (One Click Renew for Non-Qnect Products)



Confirm Renewal

If you wish to continue renewing this policy with no changes on risks or terms and conditions, select RENEW.

Otherwise, if there are any changes required to the policy, select RENEW WITH CHANGES.

If you do not wish to continue with the renewal, select CANCEL.

CANCEL **18** **RENEW WITH CHANGES** **RENEW**

Policy Header

Insurance Details

Policy No: V0274666 **Policy Status:** Awaiting Renewal

Policy Type: Motor Vehicle Insurance (MVA) **Policy of Insurance:** 26/01/2018 to 25/01/2019

Insured: Chan Tai Man **Wording:** UWD.PVCM.V2-2.6.1606

Address: Room 1532, Block C, Tall Building, 322 King's Road, Quarry Bay, Hong Kong **SP Attn Code:** 00

Agent: Li Siu Fai **Branch:** 01

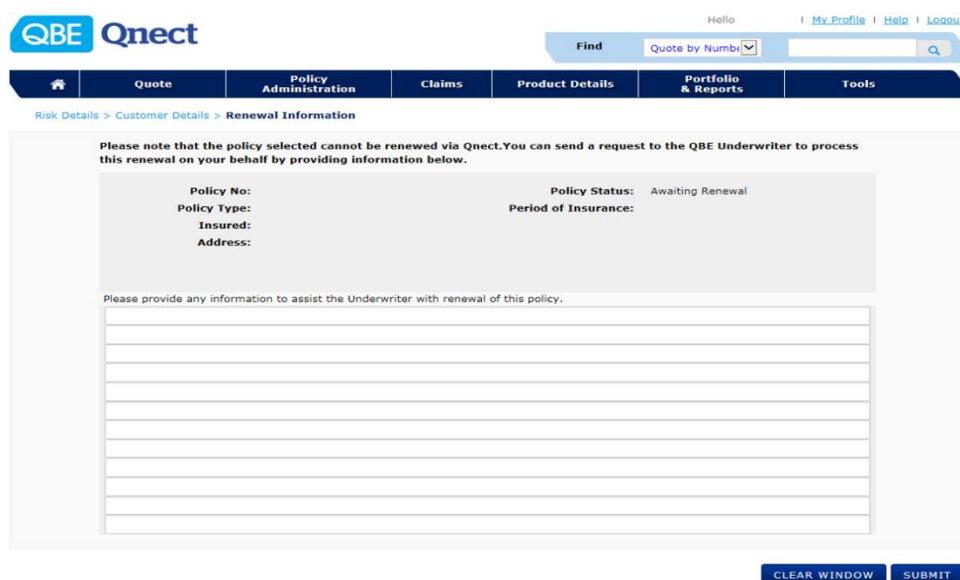
Campaign Code:

Risks **Transaction History** **Documents** **Claims**

Section	Risk	Location / Type of Business	Commence	Terminated
Private Motor	001	HONG KONG	26/01/2018	

18. Click 點擊 **RENEW WITH CHANGES**

There will be a text box popping up where you can update the required changes for QBE handling.
你可以於資料框中輸入需要更改的資料，然後交給 QBE 處理。



QBE Qnect

Hello | My Profile | Help | Logout

Find **Quote by Number**

Quote **Policy Administration** **Claims** **Product Details** **Portfolio & Reports** **Tools**

Risk Details > Customer Details > Renewal Information

Please note that the policy selected cannot be renewed via Qnect. You can send a request to the QBE Underwriter to process this renewal on your behalf by providing information below.

Policy No: **Policy Status:** Awaiting Renewal

Policy Type: **Period of Insurance:**

Insured:

Address:

Please provide any information to assist the Underwriter with renewal of this policy.

CLEAR WINDOW **SUBMIT**

F: Renewal 續保 (Qnect Products)(Without Changes 內容不變)

To retrieve the record by using the **Policy Number** : V0283774

輸入保單號碼: V0283774 以取得保單資料

Find Quote by Number Policy / Cover Note by Number V0283774

Home Quote Policy Administration Product Details Portfolio & Reports Tools

a. Select **Policy / Cover Note by Number** from **Find** option
從 **Find** 搜尋選項中，選擇保單號碼 / 臨時保單號碼

b. Enter Policy Number: V0283774
輸入保單號碼: V0283774

c. Click 點擊

[Home](#) / [Policy Header](#)

Policy and risk details based on effective date of 02/07/2018

Policy

Insurance Details

Policy No: V0283774
Policy Type: Motor Vehicle Insurance (MVA)
Customer No: 04505192
Customer Name: WONG YIU WAH
Address: RM2102, BLOCK A LONG BUILDING TALL ROAD
WANCHAI
Agent: Lee Wai Ming

Policy Status: In Force
Period of Insurance: 01/08/2017 to 31/07/2018
Wording: UWD.PVPC.V2-2.11.1512
Campaign Code:

[Risks](#)

[Transaction History](#)

[Documents](#)

Section	Risk	Location / Type of Business	Commenced	Terminated
Private Motor	001	HONG KONG	01/08/2017	01/08/2018

1

DISPLAY RENEWAL QUOTE DETAILS

POLICY OPTIONS

Review Insurance Details. The Policy Status is **In Force** and the policy is going to expire on 31/7/2018.

檢閱保單內容。保單的 Policy Status 是 **In Force** 並且會於 31/7/2018 期滿。

1. Click 點擊

F: Renewal 續保 (Qnect Products)(Without Changes 內容不變)

[Home](#) / [Renewal Quote Header](#)

Policy and risk details based on effective date of 01/08/2018 ⓘ

Renewal Quote

Renewal Quote (based on Recent Quote)

Policy No: V0283774
Quote Type: Motor Vehicle Insurance (MVA)
Customer No: 04505192
Customer Name: WONG YIU WAH
Address: RM2102, BLOCK A LONG BUILDING TALL ROAD
 WANCHAI
Agent: Lee Wai Ming

Policy Status: Awaiting Renewal
Renewal Period of Insurance: 01/08/2018 to 31/07/2019
Current Period of Insurance: 01/08/2017 to 31/07/2018
Wording: UWD.PVPC.V2-2.11.1512
Campaign Code:

[Transaction History](#)
[Documents](#)

2

Trans No.	Covers Taken	Quote Type	Renewal Quote Status	Date	Actions
001	Private Motor	Renewal Quote	Renewal Quote	01/07/2018	Edit Issue Renewal Clone Renewal

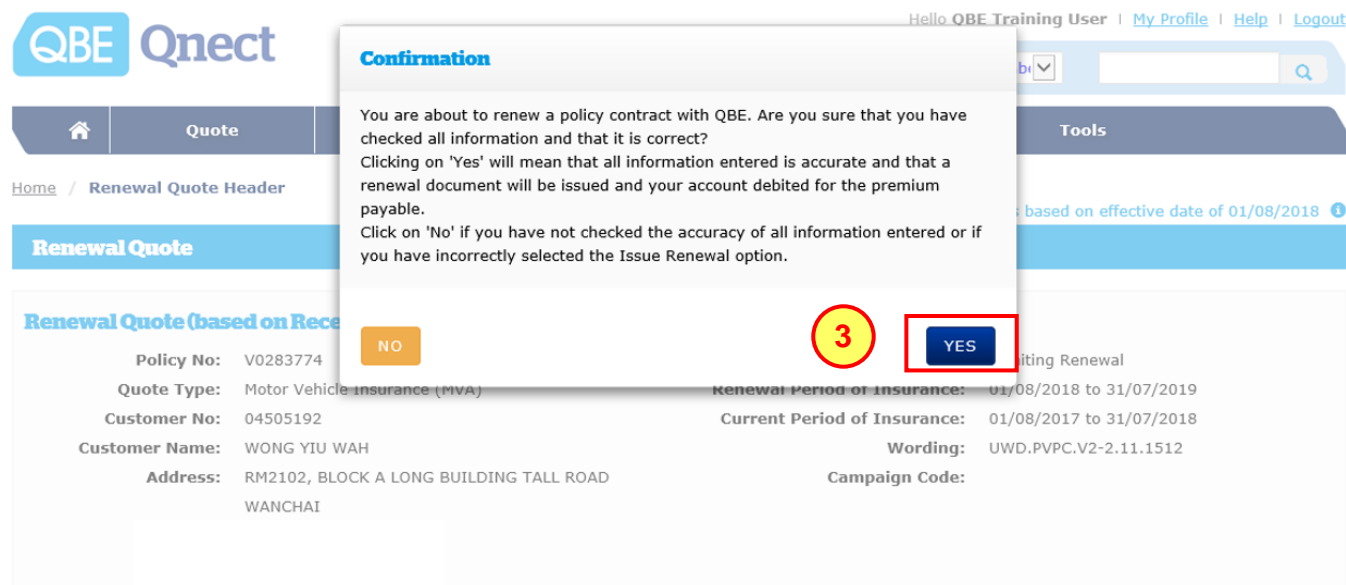
[DISPLAY POLICY DETAILS](#)
[POLICY OPTIONS](#)

Review Insurance Details. The Policy Status has changed to **Awaiting Renewal** and the Renewal Period of Insurance is shown.

檢閱保單內容。保單的 Policy Status 會變成為 **Awaiting Renewal** 並且會顯示續保之保險期。

2. Click 點擊 Issue Renewal


F: Renewal 續保 (Qnect Products)(Without Changes 內容不變)



The screenshot shows the QBE Qnect web interface. A confirmation modal is displayed in the center, asking the user to confirm the renewal. The modal text reads: "Confirmation. You are about to renew a policy contract with QBE. Are you sure that you have checked all information and that it is correct? Clicking on 'Yes' will mean that all information entered is accurate and that a renewal document will be issued and your account debited for the premium payable. Click on 'No' if you have not checked the accuracy of all information entered or if you have incorrectly selected the Issue Renewal option." The modal has two buttons: "NO" (orange) and "YES" (blue). The "YES" button is highlighted with a red box and a yellow circle with the number "3".

Below the modal, the "Renewal Quote (based on Receipt)" details are visible:

Policy No:	V0283774	Renewal Period of Insurance:	01/08/2018 to 31/07/2019
Quote Type:	Motor Vehicle Insurance (MVA)	Current Period of Insurance:	01/08/2017 to 31/07/2018
Customer No:	04505192	Wording:	UWD.PVPC.V2-2.11.1512
Customer Name:	WONG YIU WAH	Campaign Code:	
Address:	RM2102, BLOCK A LONG BUILDING TALL ROAD WANCHAI		

- Click  to issue the policy (the premium will be debited from Agent's account)
 點擊  去簽發保單 (保費會於 Agent 的賬戶中記賬結算)

F: Renewal 續保 (Qnect Products)(Without Changes 內容不變)

[Home](#) / [Policy Header](#)

Policy and risk details based on effective date of 01/08/2018

Policy

Insurance Details

Policy No: V0283774
Policy Type: Motor Vehicle Insurance (MVA)
Insured: WONG YIU WAH
Address: RM2102, BLOCK A LONG BUILDING TALL ROAD
 WANCHAI
Agent: Lee Wai Ming

Policy Status: In Force
Policy of Insurance: 01/08/2018 to 31/07/2019
Wording: UWD.PVPC.V2-2.11.1512
SP Attn Code: 00
Branch: 01
Campaign Code:

[Risks](#)
[Transaction History](#)
[Documents](#)

4

Transaction Type (expand / collapse)	Effective Date	Email	Document Type
Renewal Issue	01/08/2018		Motor Certificate (TT1234) Schedule - Client Copy Schedule - Intermediary Copy Policy Wording Debit Credit Note - Client Copy Debit Credit Note - Intermediary Copy

6

5

- Click **Documents** to displays the list of renewal policy related documents
 點擊 **Documents** 顯示續保保單之相關文件
- Click on the document name link to view the document
 點擊文件名稱連結去檢閱文件
- Click  **Email** to send the policy documents to customer
 點擊  **Email** 將保單文件以電郵發送給客戶

F: Renewal 續保 (Qnect Products)(Without Changes 內容不變)

[Home](#) / Correspondence

Correspondence

V0283774MVA

From: Lee Wai Ming

Renewal Issue

7

To*

Cc

Bcc

8

Subject

Text

9

Attachments

- ☐ Motor Certificate (TT1234)
- ☐ Schedule - Client Copy
- ☐ Schedule - Intermediary Copy
- ☐ Policy Wording
- ☐ Debit Credit Note - Client Copy
- ☐ Debit Credit Note - Intermediary Copy

10

Message Sent

Your e-mail has been sent.

OK

12

SEND

11

7. **To** - You may enter the email address of the policy holder (can add other email addresses, using semicolon (;) to separate email addresses)
電郵地址 - 您可以輸入保單持有人電郵地址 (可利用分號 (;) 相隔電郵地址以加入其他電郵地址)
8. **Subject** – You may enter your own subject
郵件標題 – 您可以輸入自定的郵件標題
9. **Text** – You may enter your content
郵件內容 – 您可以輸入自定的內容
10. **Attachments** – Select the documents that you want to send to the customer and then check the corresponding boxes
附件文件 – 您選擇要致送客戶的文件，並別對應的方格
11. Click 點擊 
12. A pop-up box will appear to confirm that the email has been sent and then click 
頁面會有顯示確認電子郵件已發送，然後點擊 

F: Renewal 續保 (Qnect Products)(With Changes 變更內容)

[Home](#) / [Policy Header](#)

Policy and risk details based on effective date of 02/07/2018 ⓘ

Policy

Insurance Details

Policy No: V0283774
Policy Type: Motor Vehicle Insurance (MVA)
Customer No: 04505192
Customer Name: WONG YIU WAH
Address: RM2102, BLOCK A LONG BUILDING TALL ROAD
 WANCHAI
Agent: Lee Wai Ming

Policy Status: In Force
Period of Insurance: 01/08/2017 to 31/07/2018
Wording: UWD.PVPC.V2-2.11.1512
Campaign Code:

[Risks](#)
[Transaction History](#)
[Documents](#)

Section	Risk	Location / Type of Business	Commenced	Terminated
Private Motor	001	HONG KONG	01/08/2017	01/08/2018

a

[DISPLAY RENEWAL QUOTE DETAILS](#)
[POLICY OPTIONS ▾](#)

If there are any changes in the renewal policy, please note the following steps.

如果續保時需要更改投保內容，請留意以下步驟。

Review Insurance Details. The Policy Status is **In Force** and the policy is going to expire on 31/7/2018.

檢閱保單內容。保單的 Policy Status 是 **In Force** 並且會於 31/7/2018 期滿。

a. Click 點擊

[DISPLAY RENEWAL QUOTE DETAILS](#)

F: Renewal 續保 (Qnect Products)(With Changes 變更內容)

[Home](#) / [Renewal Quote Header](#)

Policy and risk details based on effective date of 01/08/2018 ⓘ

Renewal Quote

Renewal Quote (based on Recent Quote)

Policy No: V0283774
Quote Type: Motor Vehicle Insurance (MVA)
Customer No: 04505192
Customer Name: WONG YIU WAH
Address: RM2102, BLOCK A LONG BUILDING TALL ROAD
 WANCHAI
Agent: Lee Wai Ming

Policy Status: Awaiting Renewal
Renewal Period of Insurance: 01/08/2018 to 31/07/2019
Current Period of Insurance: 01/08/2017 to 31/07/2018
Wording: UWD.PVPC.V2-2.11.1512
Campaign Code:

[Transaction History](#)
[Documents](#)

Trans No.	Covers Taken	Quote Type	Renewal Quote Status	Date	Actions
001	Private Motor	Renewal Quote	Renewal Quote	01/07/2018	Edit Issue Renewal Clone Renewal

b

[DISPLAY POLICY DETAILS](#)
[POLICY OPTIONS ▾](#)

Edit Renewal Quote

Period
01/08/2018
to
31/07/2019

[CANCEL](#)
[SUBMIT](#)

c

Review Insurance Details. The Policy Status has changed to Awaiting Renewal and shows the Current Period of Insurance and Renewal Period of Insurance.

檢閱保單內容。保單的 Policy Status 已成 Awaiting Renewal 並且顯示 Current Period of Insurance 及 Renewal Period of Insurance。

b. Click 點擊 Edit

c. A pop-up box will appear. If the Renewal Period of Insurance is correct, please click [SUBMIT](#)
 頁面會顯示一個信息方格。如果 Renewal Period of Insurance 是正確，請點擊 [SUBMIT](#)

F: Renewal 續保 (Qnect Products)(With Changes 變更內容)

Motor Vehicle Insurance

CUSTOMER VIEW - OFF

PRINT

Review

Period of Insurance01 August 2018 to 31 July 2019

Non-Situation Dependent Risks

Cover Sections

d

Expand All / Collapse All

	Annual Premium	Premium Due	Levy	Total Due	Commission
Private Car 2014 Mercedes-Benz E400	\$6,576.00	\$6,576.00	\$197.28	\$6,773.28	
Sub-Totals	\$6,576.00	\$6,576.00	\$197.28	\$6,773.28	
	Annual Premium	Premium Due	Levy	Total Due	
Policy Total	\$6,576.00	\$6,576.00	\$197.28	\$6,773.28	

- d. Click **the car link** in the Cover Sections to fill in the information of the car and driver
在 Cover Sections 中點擊**汽車連結**去輸入汽車和司機的資料

Remarks:

Under our Underwriting Guidelines, if the changes made to the renewal policy are classified as a Decline, you will receive the Decline Messages as below.

如果保單續保時需要作出更改，而新承保內容在 Underwriting Guidelines 中被視為 Decline，您便會收到下列信息

Decline Messages

This risk is classified as a Decline under the Qnect platform due to the following reasons. Please email/contact your QBE representative to determine if they can assist you with this risk under a separate product and pricing option:

- Driver's Occupation is outside guidelines

Under our underwriting guidelines, if the changes made to the renewal policy are classified as a Referral, you will receive the Referral Messages Applicable to Intermediaries as below.

如果保單續保時需要作出更改，而新承保內容在 Underwriting Guidelines 中被視為 Referral，您便會收到下列信息。

Referral Messages Applicable to Intermediaries

Please review Risk/s based on the following referral reasons:

- Referral required for inexperienced driver

F: Renewal 續保 (Qnect Products)(With Changes 變更內容)

Vehicle Details

Cover Type* Comprehensive
Use of Vehicle* Private Use
Vehicle Description* 2014 Mercedes-Benz E400 MY14 W212 Elegance Sedan 4dr +/- 7sp Rear Wheel Drive 3.0T
Make and Model* Mercedes-Benz E400
Body Type* SEDAN
Cylinder Capacity* 2996
Seating Capacity* 5
Registration Mark* TT2345
Engine Number* 987654321
Chassis Number* 123456789
Sum Insured* 200000
Hire Purchase Owner Name

SEARCH FOR VEHICLE

e

Driver Type*
Full Name of Driver*
Occupation*
Date of Birth (DD/MM/YYYY)*
HKID / Passport No*
No of Years Licensed*
Have you had any traffic offences in the last 3 years?*

f

h

g

Add / Clear

Driver Name	Driver Type	Occupation	Date of Birth	HKID	Yrs Licensed	Offences	
Wong Yiu Wah	Insured Driver	Manager	01/07/1970	D666333(0)	2 years or more	0 to 3 points deducted	<input type="button" value="i"/>
Wong Yiu Wah	Named Driver	Manager	01/07/1970	D666333(0)	2 years or more	0 to 3 points deducted	<input type="button" value="i"/>
Chan Pak Hong	Named Driver	Singer / Entertainer	01/07/1997	Y223344(5)	less than 1 year	0 to 3 points deducted	<input type="button" value="i"/>

No Claim Discount

No Claim Discount 40%
Previous Insurer XYZ Insurance
Previous Policy No 123456789

Optional Extensions

Guangdong Province Extension No
Increase third party property damage limits HK\$5,000,000

i

F: Renewal 續保 (Qnect Products)(With Changes 變更內容)

- e. You can edit the Vehicle Details (e.g. Sum Insured)
更改受保汽車資料 (例如：投保額)
- f. You can add a new Named Driver
您可增加記名司機
- g. Click “Add” to add the driver’s information
點擊 “Add” 將司機資料加入保單
- h. You can click the driver name link to edit the driver’s information
點擊司機姓名連結去更改司機資料
- i. You can edit Optional Extensions
您可更改 Optional Extensions

Excess

Section 1

Accidental Damage Excess

HKD 8,000

5 % of SI ⓘ

Theft Excess

HKD 7,500

5 % of SI ⓘ

Young Driver Excess

HKD 7,500

Inexperienced Driver Excess

HKD 7,500

Unnamed Driver Excess

HKD 7,500

Parking Excess

HKD 3,000

Third Party Property Damage Excess

HKD

Guangdong Province Accidental Damage

HKD

Guangdong Province Theft Excess

HKD

Section 2

HKD ⓘ

HKD ⓘ

HKD 7,500

HKD 7,500

HKD 7,500

HKD

HKD 8,000

HKD ⓘ

HKD ⓘ

Clauses (5) General pages Renewal Notes (0)

Premium Breakdown:

Annual Premium ⓘ

Premium Due

Levy

Total Due

Commission Rate

Commission Amount

Private Car

\$5,223.00

\$5,223.00

\$156.69

\$5,379.69

Total

\$5,223.00

\$5,223.00

\$156.69

\$5,379.69

j

CALCULATE PREMIUM >

Total Premium

5,379.69 HKD

k

NEXT >

j. Click 點擊 [CALCULATE PREMIUM >](#)


k. Click 點擊 [NEXT >](#)

F: Renewal 續保 (Qnect Products)(With Changes 變更內容)**Review**

Period of Insurance 01 August 2018 to 31 July 2019

Non-Situation Dependent Risks

Cover Sections[Expand All](#) / [Collapse All](#)

	Annual Premium	Premium Due	Levy	Total Due	Commission
Private Car 2014 Mercedes-Benz E400 	\$5,223.00	\$5,223.00	\$156.69	\$5,379.69	
Sub-Totals	\$5,223.00	\$5,223.00	\$156.69	\$5,379.69	
	Annual Premium	Premium Due	Levy	Total Due	
Policy Total	\$5,223.00	\$5,223.00	\$156.69	\$5,379.69	

Attachments

Applicable to

File Name/ Description

File

BROWSE

ATTACH

Applicable to

Date Attached

Description

File Name

Size in MB

**NEXT** ➔

I. Click 點擊

NEXT ➔

F: Renewal 續保 (Qnect Products)(With Changes 變更內容)

Customer Details

Customer Type*

☐ Check the box if Customer Details are the same as the Insured Driver details

Name*

ID Number*

Gender*

Date of Birth*

Nationality

Home Telephone Number

Business Telephone Number

Mobile Number

Fax Number

Email Address

Unit / Floor Number

Building Number and Name

Street Number and Name*

District

Country*

Total Premium **5,379.69** HKD

SAVE PENDING

ISSUE QUOTE

ISSUE RENEWAL COVER NOTE

ISSUE RENEWAL

Confirmation

You are about to renew a policy contract with QBE. Are you sure that you have checked all information and that it is correct?
Clicking on 'Yes' will mean that all information entered is accurate and that a renewal document will be issued and your account debited for the premium payable.
Click on 'No' if you have not checked the accuracy of all information entered or if you have incorrectly selected the Issue Renewal option.

NO

n

YES

m

m. Click 點擊 **ISSUE RENEWAL**

n. Click **YES** to issue the policy (the premium will be debited from Agent's account)
Click **YES** 去簽發保單 (保費會於 Agent 的賬戶中記賬結算)

F: Renewal 續保 (Qnect Products)(With Changes 變更內容)

[Home](#) / [Policy Header](#)

Policy and risk details based on effective date of 01/08/2018

Policy

Insurance Details





Policy No:	V0283774	Policy Status:	In Force
Policy Type:	Motor Vehicle Insurance (MVA)	Policy of Insurance:	01/08/2018 to 31/07/2019
Insured:	WONG YIU WAH	Wording:	UWD.PVPC.V2-2.11.1512
Address:	RM2102, BLOCK A LONG BUILDING TALL ROAD WANCHAI	SP Attn Code:	00
Agent:	Lee Wai Ming	Branch:	01
		Campaign Code:	

[Risks](#)

[Transaction History](#)

[Documents](#)



Transaction Type (expand / collapse)	Effective Date	Email	Document Type
<div>  Renewal Issue </div>	01/08/2018	 	<div> Motor Certificate (TT1234) </div> <div> Schedule - Client Copy </div> <div> Schedule - Intermediary Copy </div> <div> Policy Wording </div> <div> Debit Credit Note - Client Copy </div> <div> Debit Credit Note - Intermediary Copy </div> 

- o. Click **Documents** to displays the list of renewal policy related documents

點擊 **Documents** 顯示續保保單之相關文件

- p. Click on the document name link to view the document

點擊文件名稱連結去檢閱文件

- q. Click  **Email** to send the policy documents to customer

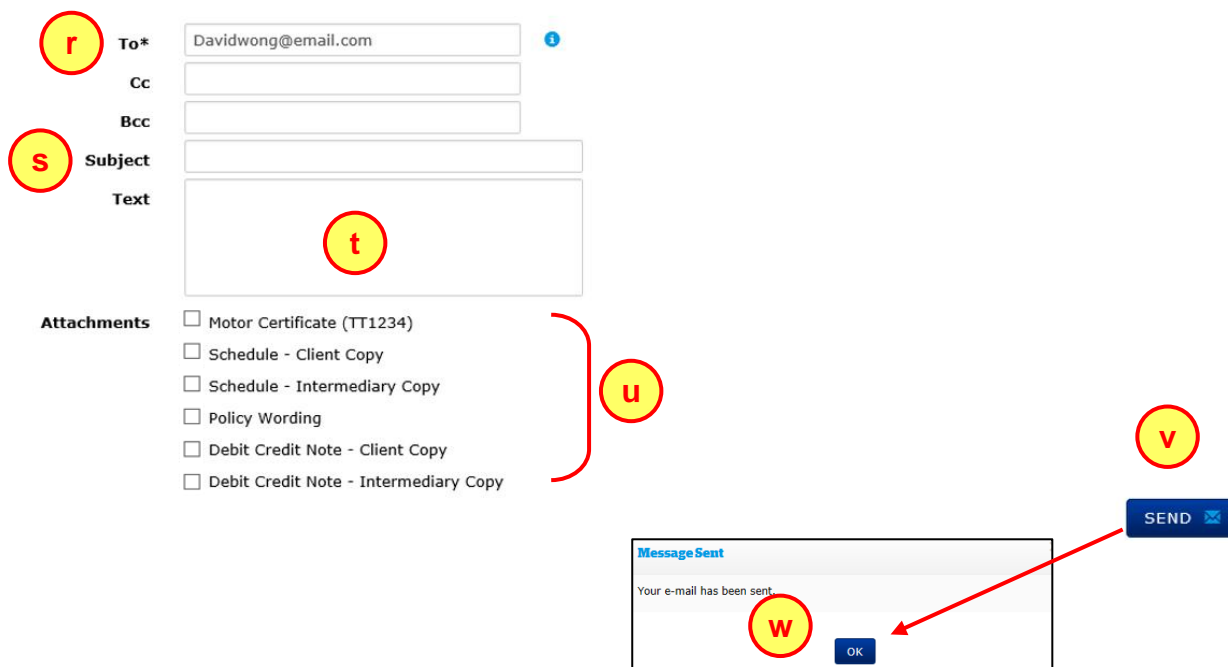
點擊  **Email** 將保單文件以電郵發送給客戶

F: Renewal 續保 (Qnect Products)(With Changes 變更內容)

[Home](#) / Correspondence

Correspondence

V0283774MVA



The screenshot shows the 'Correspondence' form in the Qnect system. It includes fields for 'To*', 'Cc', 'Bcc', 'Subject', and 'Text'. Below these are checkboxes for attachments: 'Motor Certificate (TT1234)', 'Schedule - Client Copy', 'Schedule - Intermediary Copy', 'Policy Wording', 'Debit Credit Note - Client Copy', and 'Debit Credit Note - Intermediary Copy'. A 'SEND' button is located at the bottom right. A 'Message Sent' pop-up box is shown at the bottom center, indicating that the email has been sent successfully.

- r. **To** - You may enter the email address of the policy holder (can add other email addresses, using semicolon (;) to separate email addresses)
電郵地址 - 您可以輸入保單持有人電郵地址 (可利用分號 (;) 相隔電郵地址以加入其他電郵地址)
- s. **Subject** – You may enter your own subject
郵件標題 – 您可以輸入自定的郵件標題
- t. **Text** – You may enter your content
郵件內容 – 您可以輸入自定的內容
- u. **Attachments** – You may check the box besides the document's name if you want to send it
附件文件 – 您可以對應的文件方格，以便發送予客戶
- v. Click 點擊 
- w. A pop-up box will appears to confirm that the email has been sent and then click 
頁面會有顯示去確認電子郵件已發送，然後點擊 

--- End ---