

--- Motor Vehicle Insurance ---(Private Vehicle)

Version: May 2019



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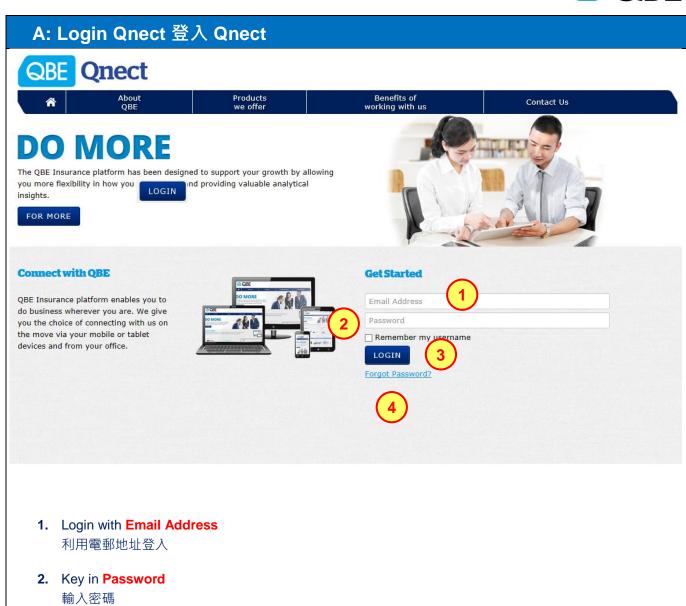
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Part A

Login Qnect 登入 Qnect





- 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

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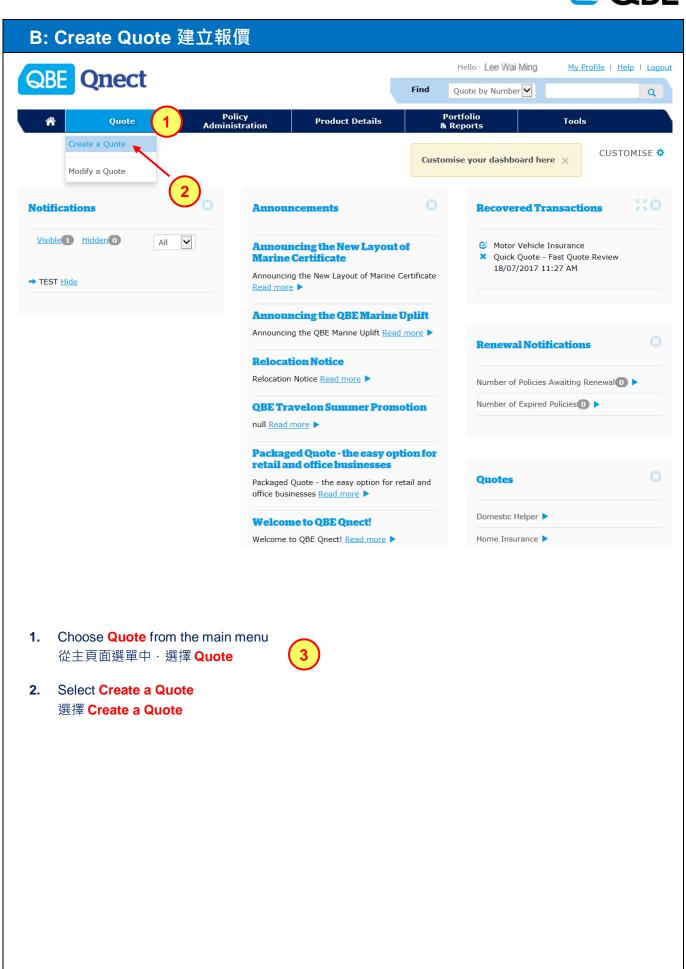


Part B

Create Quote

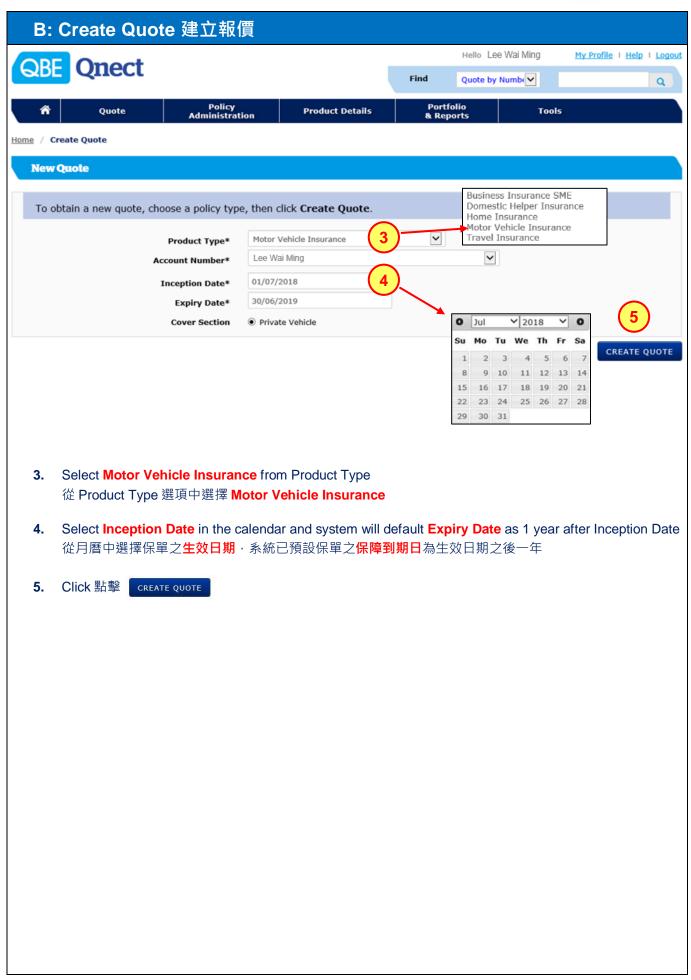
建立報價





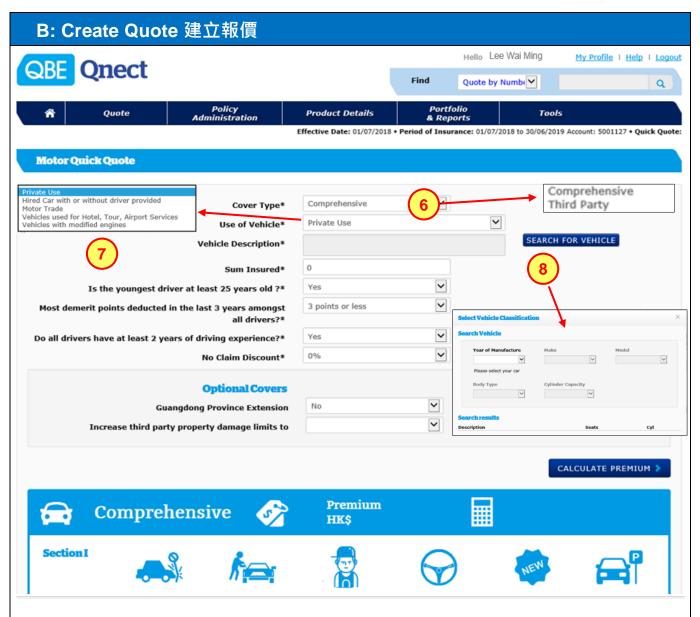
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- **6.** Select **Comprehensive** or Third Party from the Cover Type 從 Cover Type 中選擇 **Comprehensive** 或 Third Party
- 7. Select type of use from the Use of Vehicle 從車輛用途選項中選擇 Use of Vehicle For any option other than Private Use, the quote will be referred to the underwriter 除非車輛用途是 Private Use,否則該報價會被轉介至核保同事跟進

8. Click 點擊 SEARCH FOR VEHICLE

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9. Select Year of Manufacture

選擇製造年份

10. Select Make

選擇廠名

11. Select Model

選擇型號

12. Select Body Type

選擇車身類型

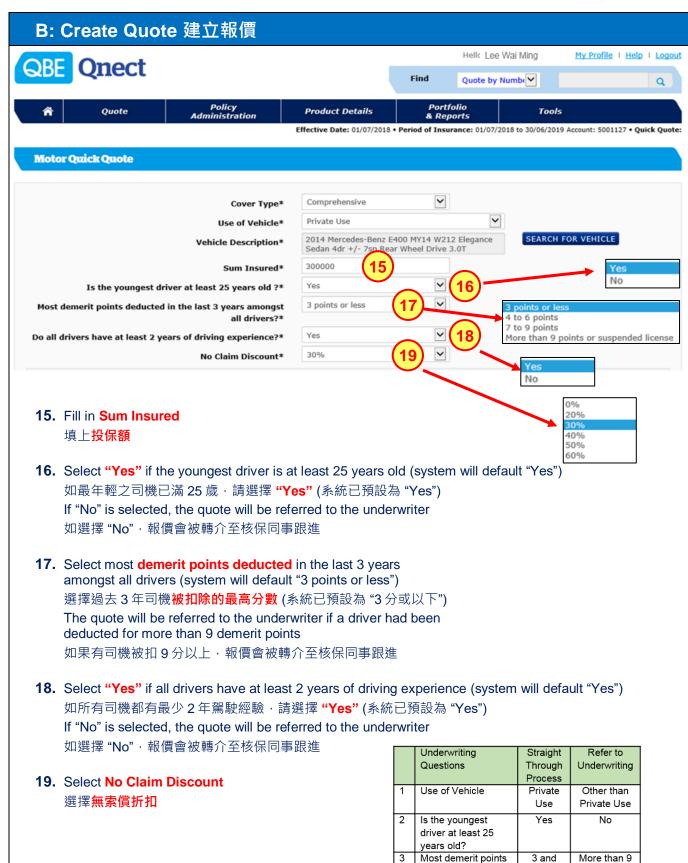
13. Select Cylinder Capacity

選擇汽缸容量

14. Select the car from the Search results

從 Search results 中選擇汽車





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deducted in the last

3 years amongst all

Do all drivers have

at least 2 years of driving experience?

drivers?

below

4 - 6

7 - 9

Yes

suspended

license

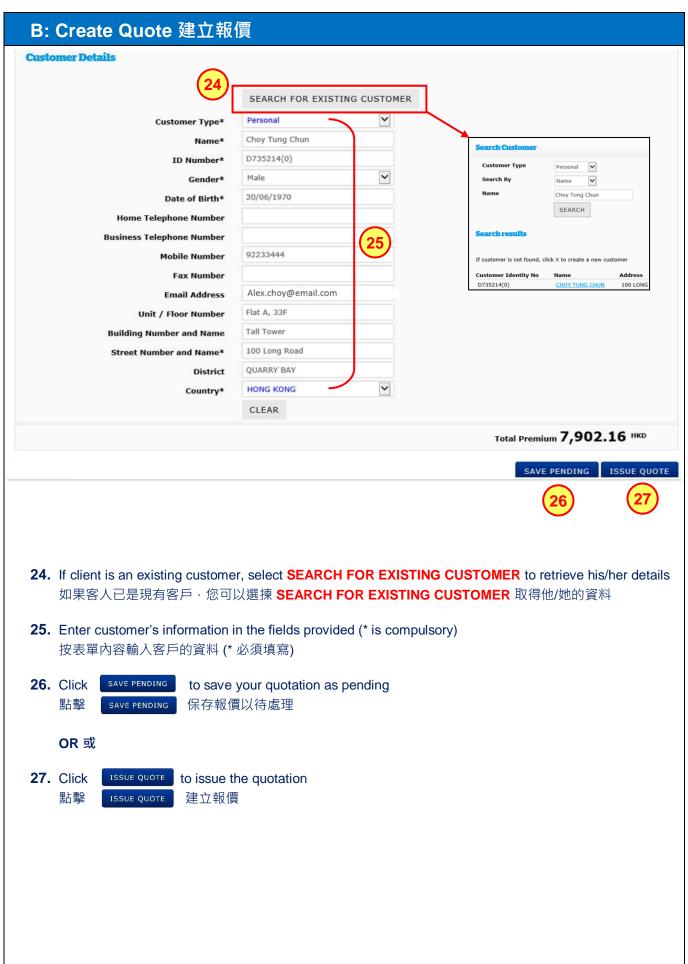
Nο





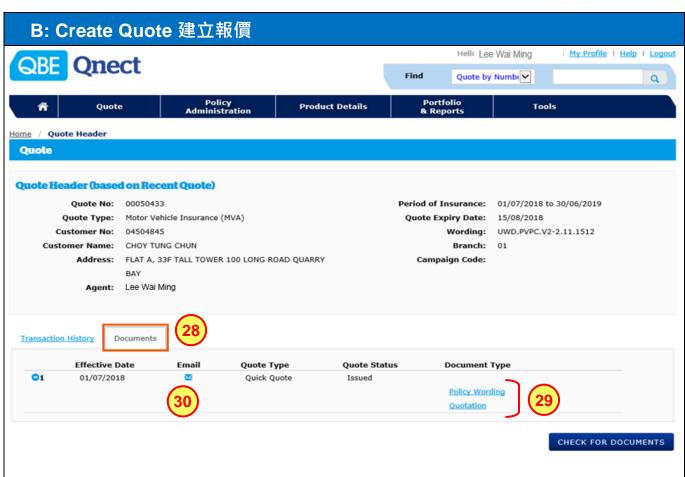
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- 28. Click **Documents** to enter the Documents folder 點擊 **Documents** 進入文件夾頁面
- **29.** Document Type (Policy Wording /Quotation) · click on the document link to view the document Document Type (保單條款/報價) · 點擊文件名稱去檢閱文件







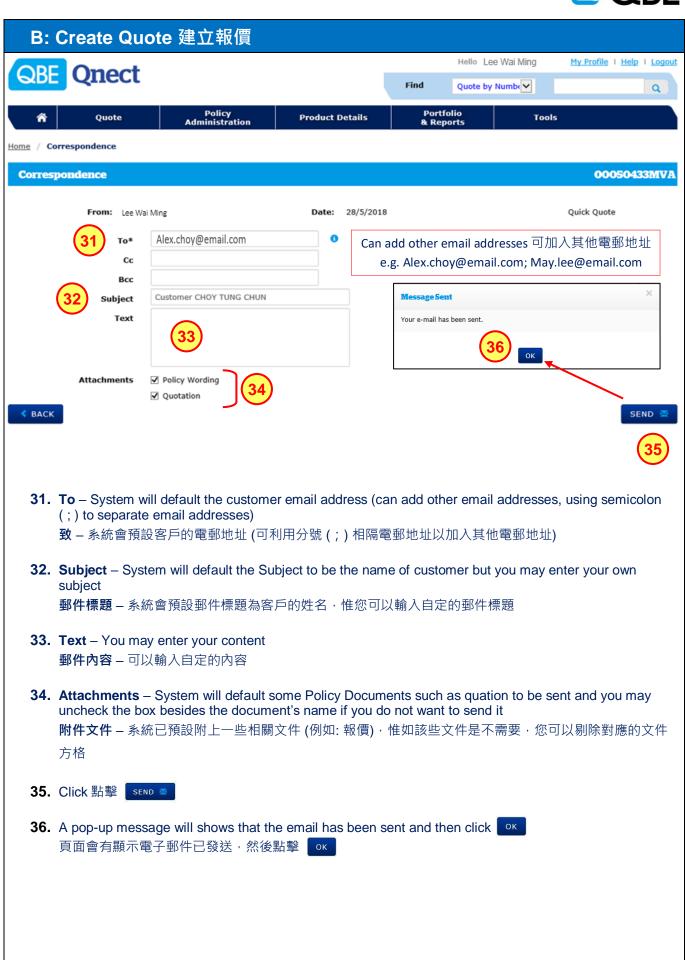


30. Click **Email** to send the policy wording and quotation to customer

點擊 🔀 Email 將保單條款及報價文件以電郵發送給客戶

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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

Policy Administration

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

b. Enter Quote Number: 00050433

輸入報價號碼: 00050433

Quote

Click 點擊 Q

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C: Issue Cover Note 簽發臨時保單

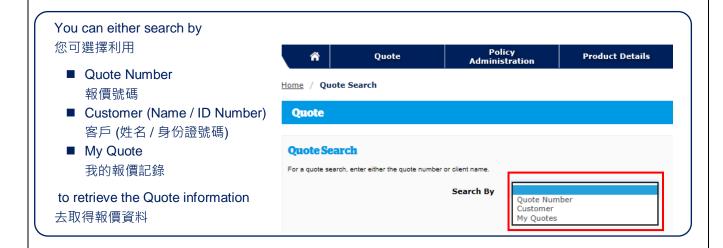
Option Two

第二種方法

To retireive 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



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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

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

vi. Click 點擊 SEARCH





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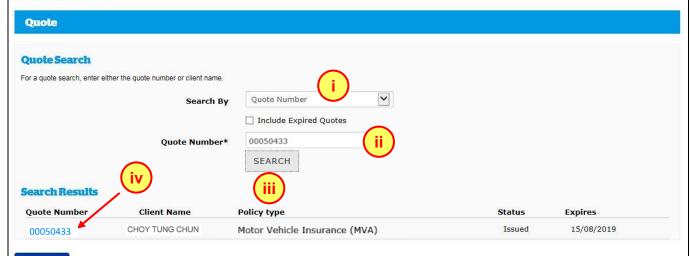


C: Issue Cover Note 簽發臨時保單

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



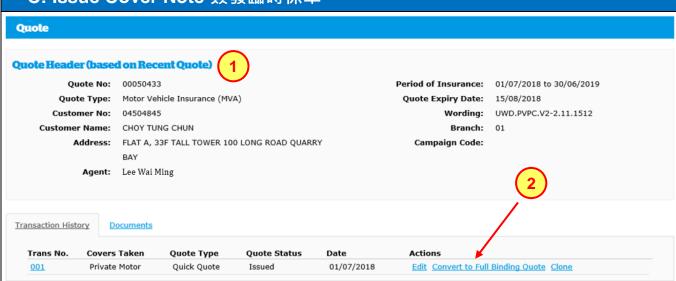
S BACK

- i. Search By Quote Number 從搜尋選項中·選擇報價號碼
- ii. Enter **Quote Number** e.g. 00050433 輸入**報價號碼** – 例如: 00050433
- iii. Click 點擊 SEARCH
- iv. Click on the **Quote Number**: <u>00050433</u> and go to the quotation details 點擊<mark>報價號碼: 00050433</mark> 去進入報價內容

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C: Issue Cover Note 簽發臨時保單



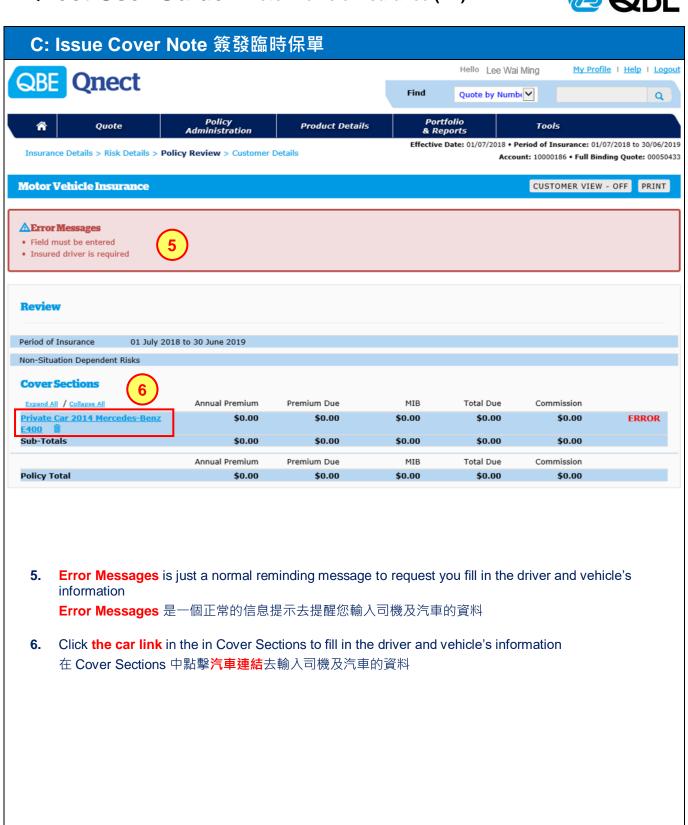
- Quote Header main page
 Quote Header 頁面
- Click on <u>Convert to Full Binding Quote</u> to issue Cover Note 點擊 <u>Convert to Full Binding Quote</u> 去簽發臨時保單
- 3. Review Inception Date and Expiry Date 檢閱起保日期及到期



4. Click 點擊 CONVERT QUOTE

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C: Issue Cover Note 簽發臨時保單 **Vehicle Details** Comprehensive Cover Type* ~ Private Use Use of Vehicle* 2014 Mercedes-Benz E400 MY14 W212 Elegance Sedan 4dr SEARCH FOR VEHICLE Vehicle Description* +/- 7sp Rear Wheel Drive 3.0T Mercedes-Benz E400 Make and Model* SEDAN Body Type* 2996 Cylinder Capacity* 0 5 Seating Capacity* TBA 0 Registration Mark* 123456789 0 Engine Number* 234567890 Chassis Number* Sum Insured* 300000 Hire Purchase Owner Name 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 Refers to "Make" and "Model" of the Vehicle Registration Document or Sales & Purchase Agreement for specific description.

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- 8. Select **Driver Type** 選擇**司機類**別
- 9. 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
- 10. Select Occupation

選擇職業

11. 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

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

選擇過去3年司機被扣除的分數

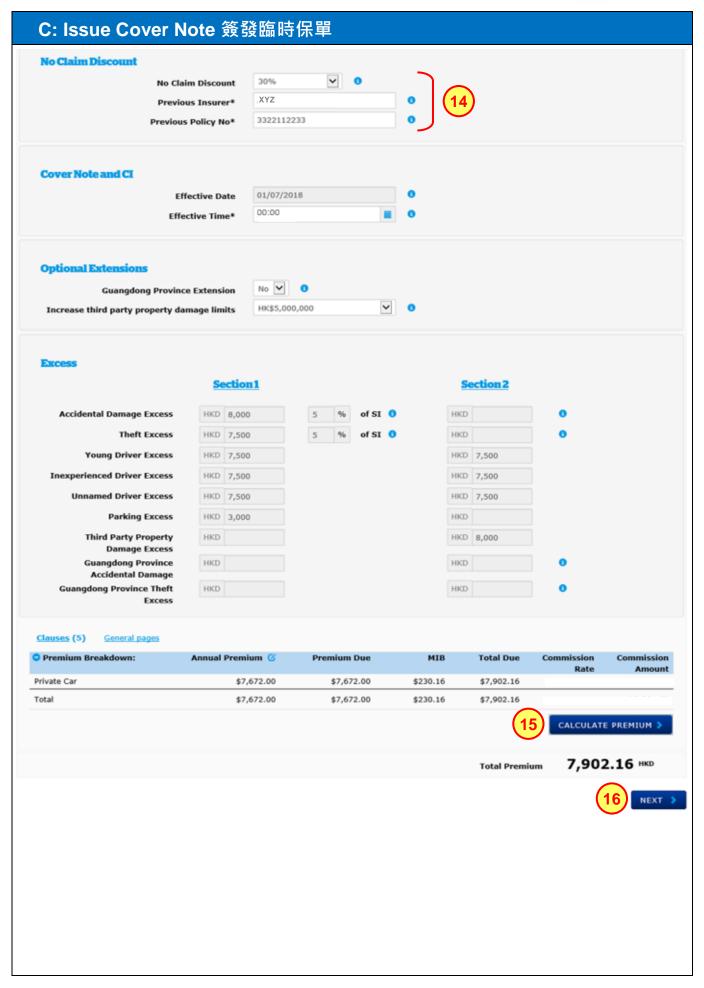
If the driver has been deducted for more than 9 points, the policy will be referred to the underwriter 如司機被除 9 分以上,保單會被轉介至核保同事跟進

13. Click "Add" to add the driver's information

點擊 "Add" 將司機資料加入保單

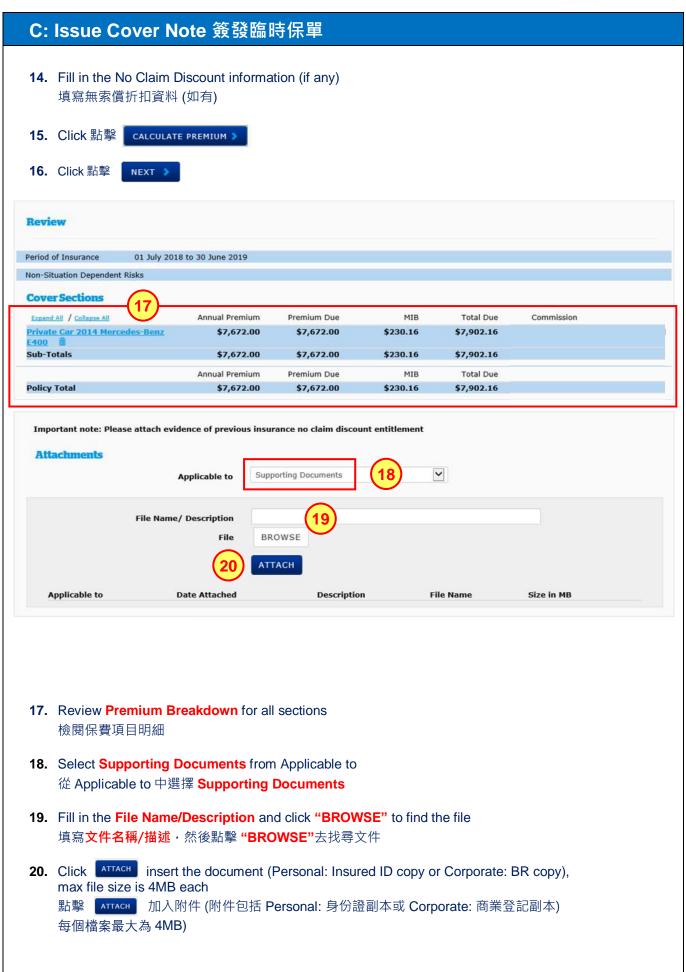
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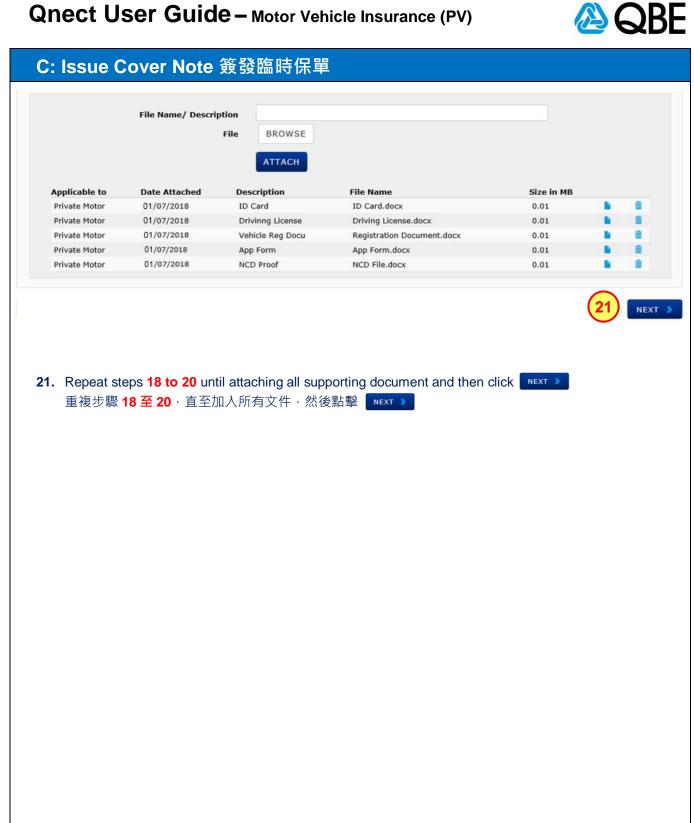
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C: Issue Cover Note 簽發臨時保單 **Customer Details** SEARCH FOR EXISTING CUSTOMER Personal Customer Type* ☐ Check the box if Customer Details are the s me as the Insured Driver details CHOY TUNG CHUN D735214(0) ID Number* Male Gender* Date of Birth* 20/06/1970 ~ HONG KONG Nationality **Home Telephone Number Business Telephone Number** 92233444 **Mobile Number** Fax Number Alex.choy@email.com **Email Address** FLAT A, 33F Unit / Floor Number **Building Number and Name** TALL TOWER 100 LONG ROAD Street Number and Name* QUARRY BAY District HONG KONG Country* CLEAR Total Premium 7,902.16 HKD REFER TO UNDERWRITER ISSUE QUOTE ISSUE COVER NOTE SAVE PENDING ISSUE POLICY 22. 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) 23. Click 點擊 ISSUE COVER NOTE To save the input information for future use. 1 Save Pending 先儲存已輸入之資料以待日後處理。 The underwriter will review the case manually. 2 Refer to Underwriter 核保同事會因應投保之風險作出檢視及核保。

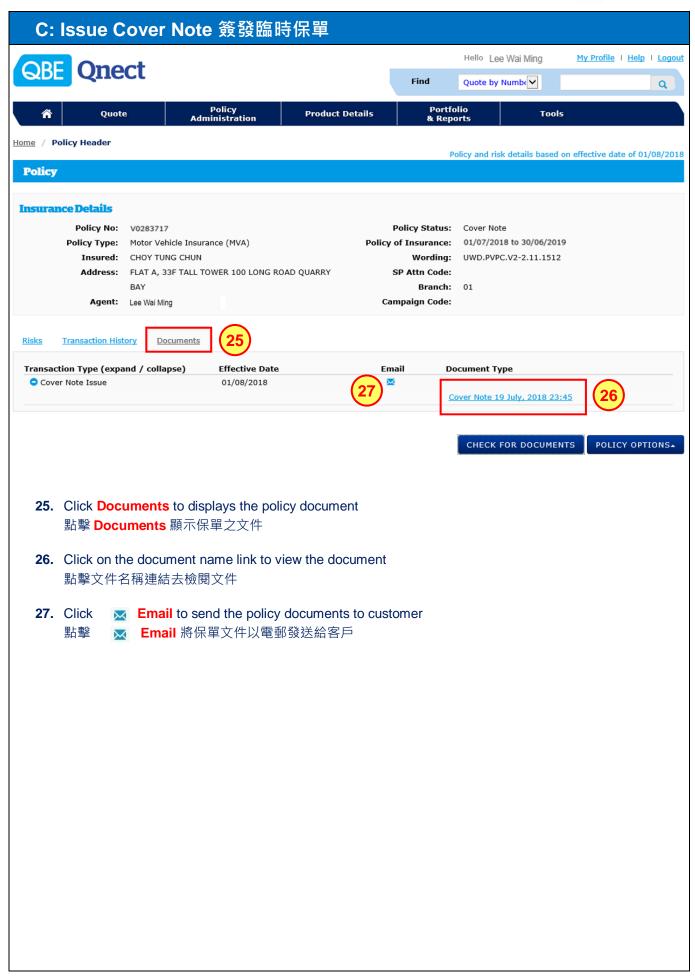
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C: Issue Cover Note 簽發臨時保單 Confirmation **Customer Details** You are about to issue a policy contract with QBE. Are you sure that you have checked all information and that it is correct? Clicking on 'Yes' will mean that all information entered is accurate and Custo 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 r details if you have incorrectly selected the Issue Policy option. HONG KONG Nationality Home Telephone Number **Business Telephone Number** 92233444 Mobile Number Email Address FLAT A, 33F Unit / Floor Number TALL TOWER **Building Number and Name** 100 LONG ROAD Street Number and Name* **OUARRY BAY** District HONG KONG Country* CLEAR Total Premium 7,902.16 HKD 24. Click to Issue Cover Note (the premium will be debited from Agent's account) 去 Issue Cover Note (保費會於 Agent 的賬戶中記賬結算) 點擊

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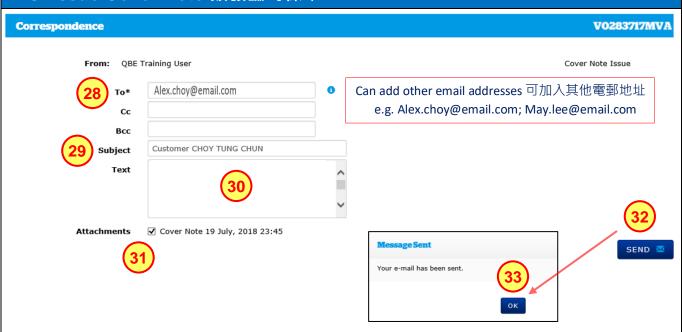




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C: Issue Cover Note 簽發臨時保單



- **28. 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)
- 29. 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
- **30. 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
- **31. 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
- 32. Click 點擊 SEND ▼
- **33.** 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 ok

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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** V0283717

輸入臨時保單號碼 (V0283717) 以取得資料



a. Select Policy / Cover Note by Number from Find option

b. Enter Cover Note Number: **V0283717** 輸入臨時保單號碼: **V0283717**

從 Find 中選擇 Policy / Cover Note by Number

c. Click 點擊 Q

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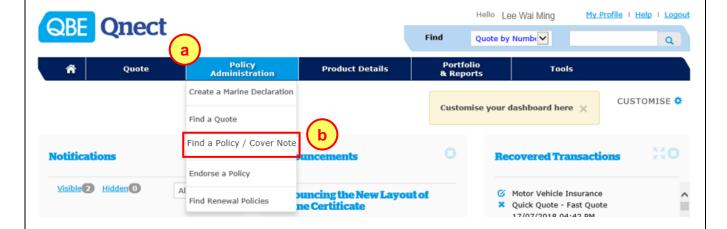


D: Issue Policy 簽發保單

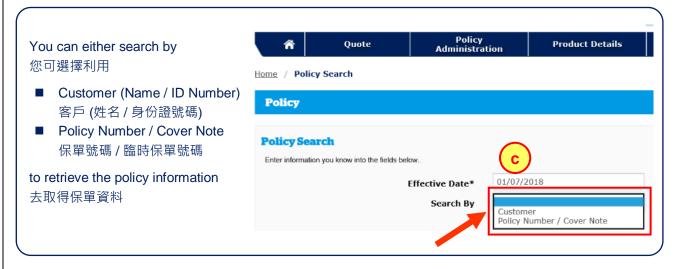
Option Two

第二種方法

To retireive 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



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



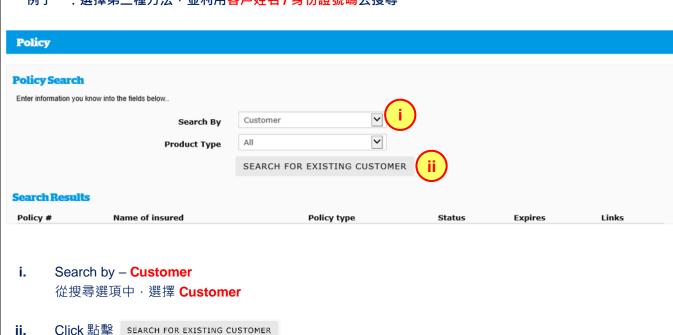
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D: Issue Policy 簽發保單

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



- 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

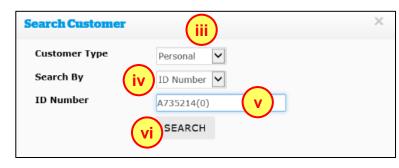
Select Search By - ID Number 從 Search By 中選擇 ID Number

Enter Name - Choy Tung Chun ٧. 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





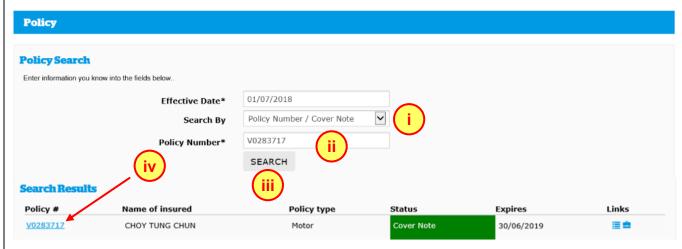


D: Issue Policy 簽發保單

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

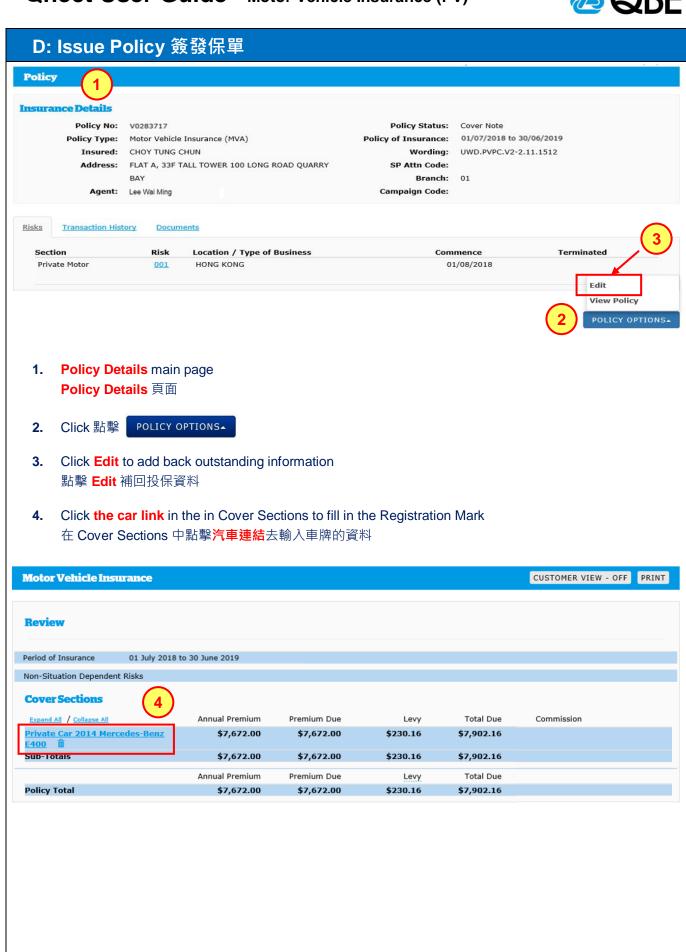
Home / Policy Search



- i. Search by Policy Number / Cover Note 從搜尋選項中,選擇 Policy Number / Cover Note
- **ii.** Enter Cover Note (V0283717) 輸入報價號碼 (V0283717)
- iii. Click 點擊 SEARCH
- iv. Click on the Policy Number: <u>V0283717</u> and go to the Policy details 點擊保單號碼: <u>V0283717</u> 去進入保單內容

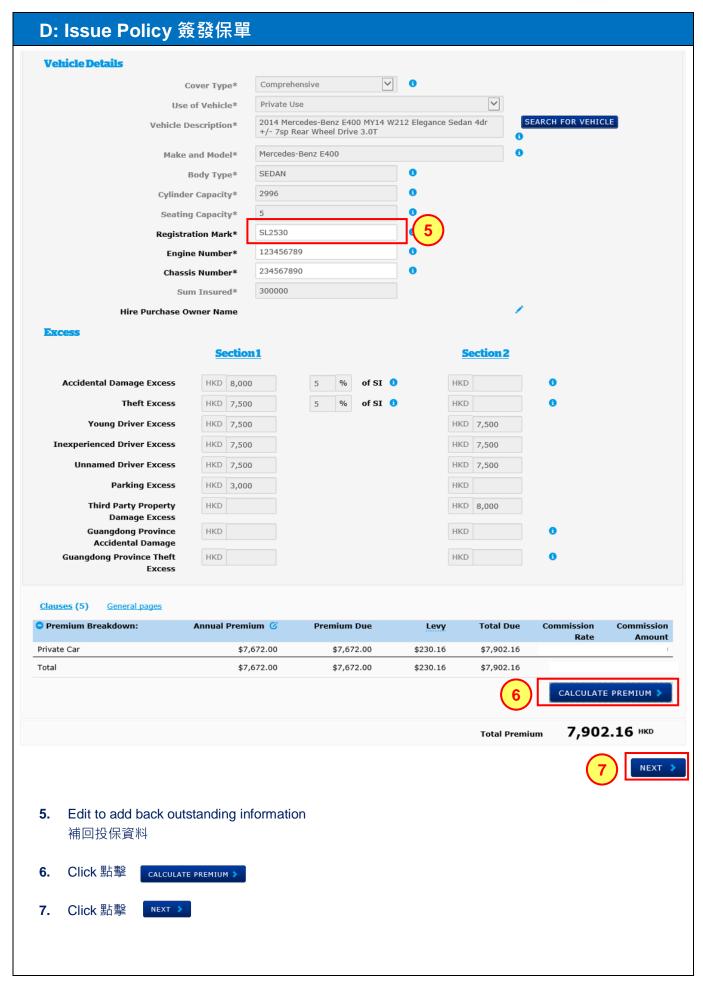
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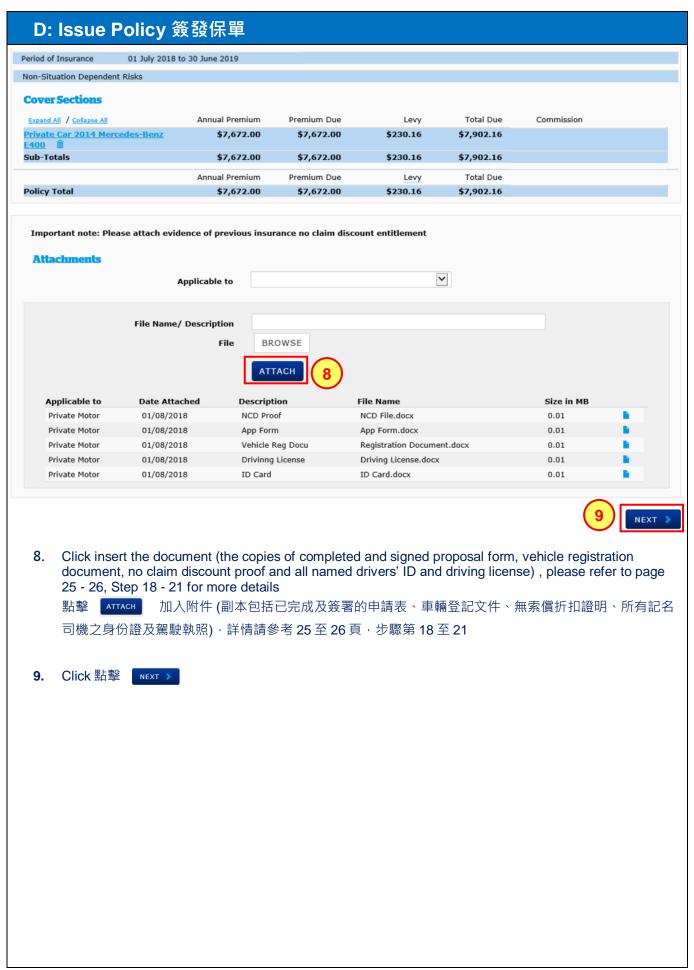
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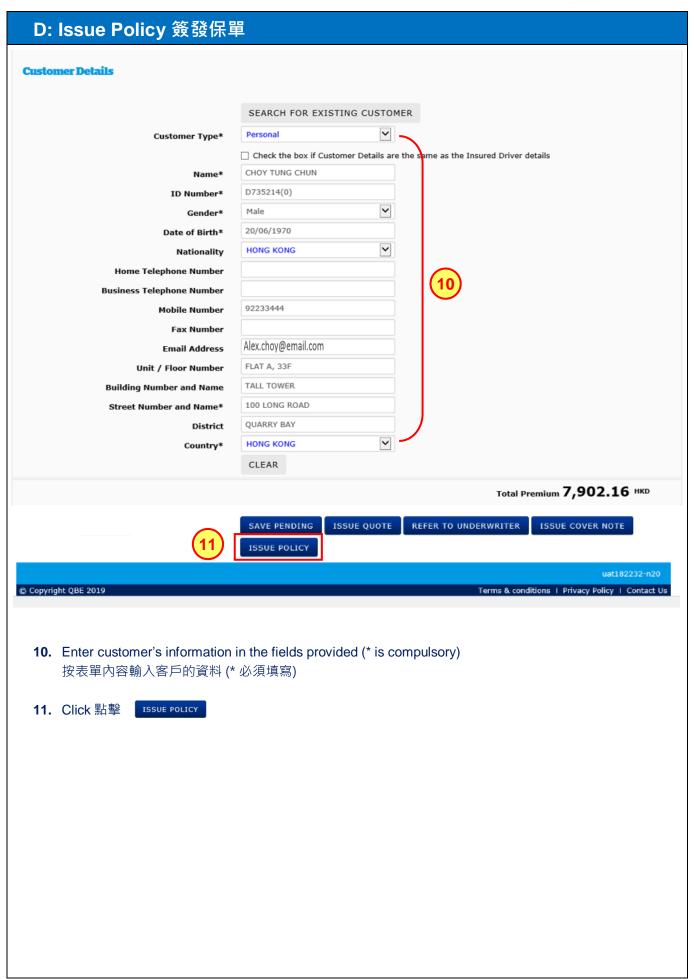
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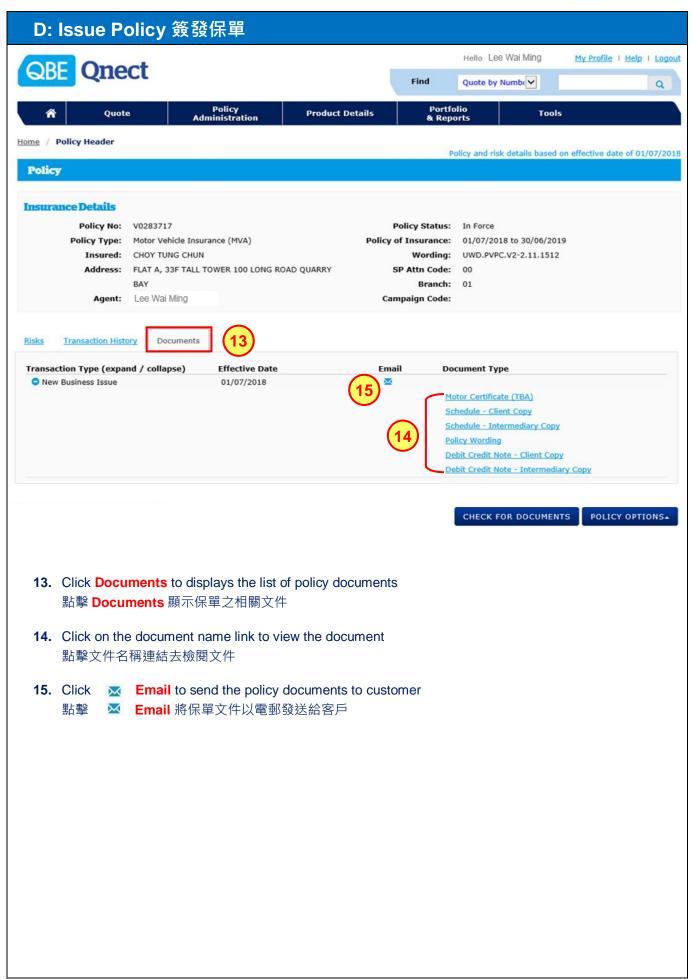
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D: Issue Policy 簽發保單 **Confirmation Customer Details** You are about to issue a policy contract with QBE. Are you sure that you have checked all information and that it is correct? Clicking on 'Yes' will mean that all information entered is accurate and Custo that a policy document will be issued and your Agent account debited for the premium payable. r details Click on 'No' if you have not checked the accuracy of all information entered or if you have incorrectly selected the Issue Policy option. HONG KONG Nationality Home Telephone Number **Business Telephone Number** 92233444 Mobile Number Fax Number Email Address FLAT A, 33F Unit / Floor Number TALL TOWER **Building Number and Name** 100 LONG ROAD Street Number and Name* QUARRY BAY District HONG KONG Country* CLEAR Total Premium 7,902.16 HKD 12. Click to issue the policy (the premium will be debited from Agent's account) YES 去簽發保單 (保費會於 Agent 的賬戶中記賬結算) 點擊

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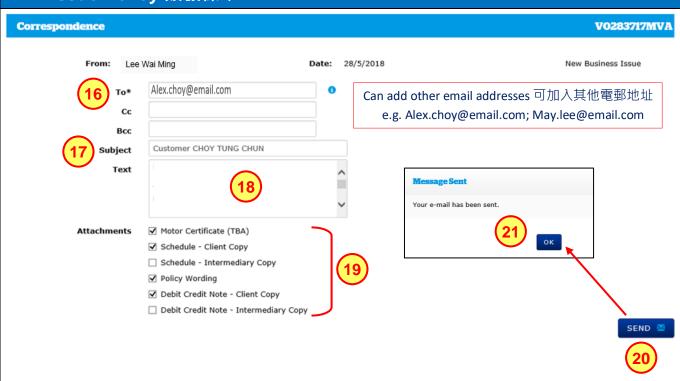




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D: Issue Policy 簽發保單



- **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 if

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 SEND ▼
- **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 ok

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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,



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

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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 V0283717

輸入保單號碼 (V0283717) 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: **V0283717** 輸入保單號碼: **V0283717**

c. Click 點擊 Q

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E: Endorsement 更改保單

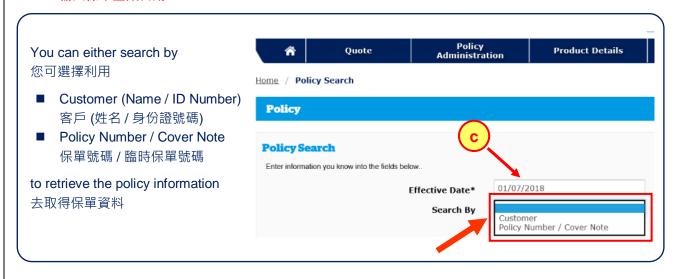
Option Two

第二種方法

To retireive 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
- b. Select Endorse a Policy 選擇 Endorse a Policy
- c. Input Policy Effective Date 輸入保單生效日期



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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. Customer Search By All **Product Type** SEARCH FOR EXISTING CUSTOMER **Search Results** Policy # Links Name of insured Policy type Status **Expires**

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

vi. Click 點擊 SEARCH





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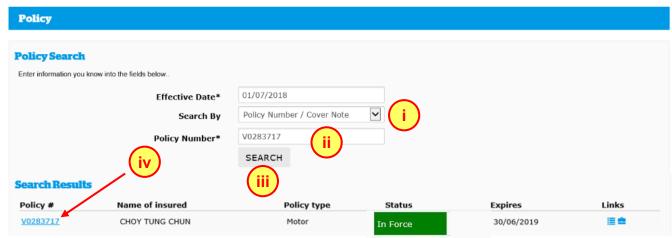


E: Endorsement 更改保單

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

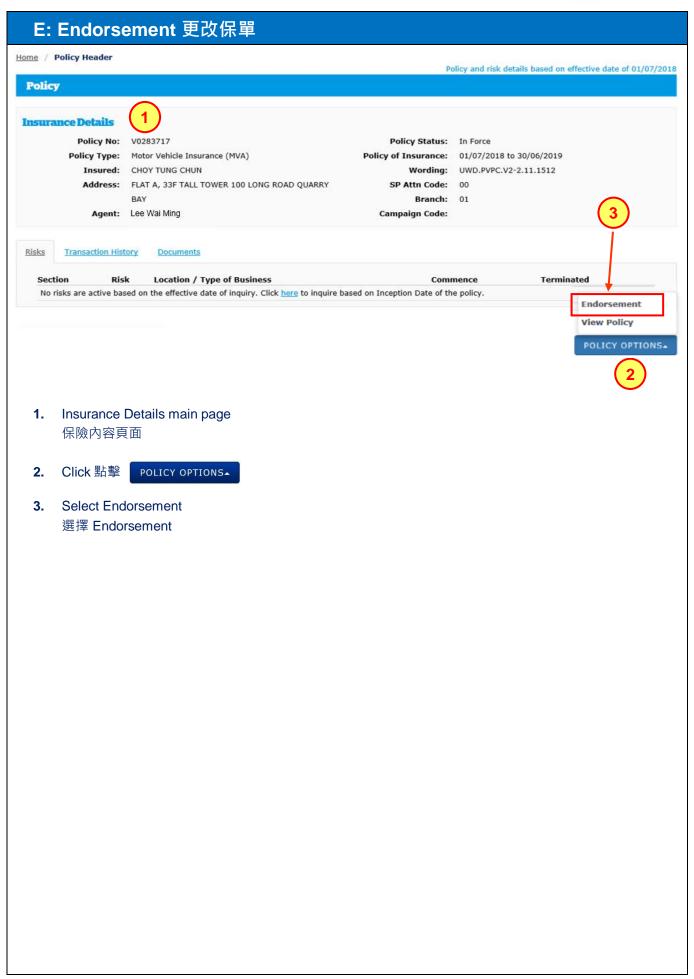
Home / Policy Search



- i. Search by Policy Number / Cover Note 從搜尋選項中,選擇 Policy Number / Cover Note
- ii. Enter Policy Number (V0283717) 輸入保單號碼 (V0283717)
- iii. Click 點擊 SEARCH
- iv. Click on the Policy Number: <u>V0283717</u> and go to the policy details 點擊保單號碼: <u>V0283717</u> 去進入保單內容

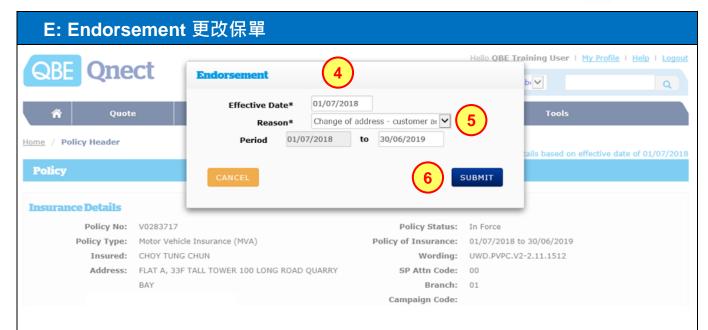
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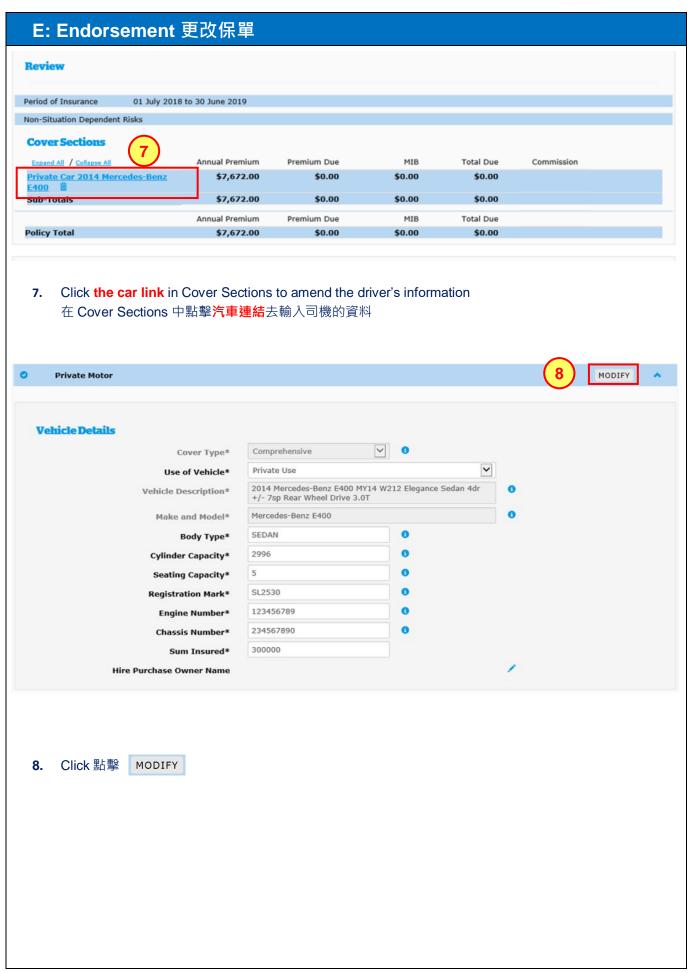
4. System will default system date as Endorsement **Effective Date** but you can change it according to customer's needs.

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

- **5.** 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)
- 6. Click 點擊 SUBMIT

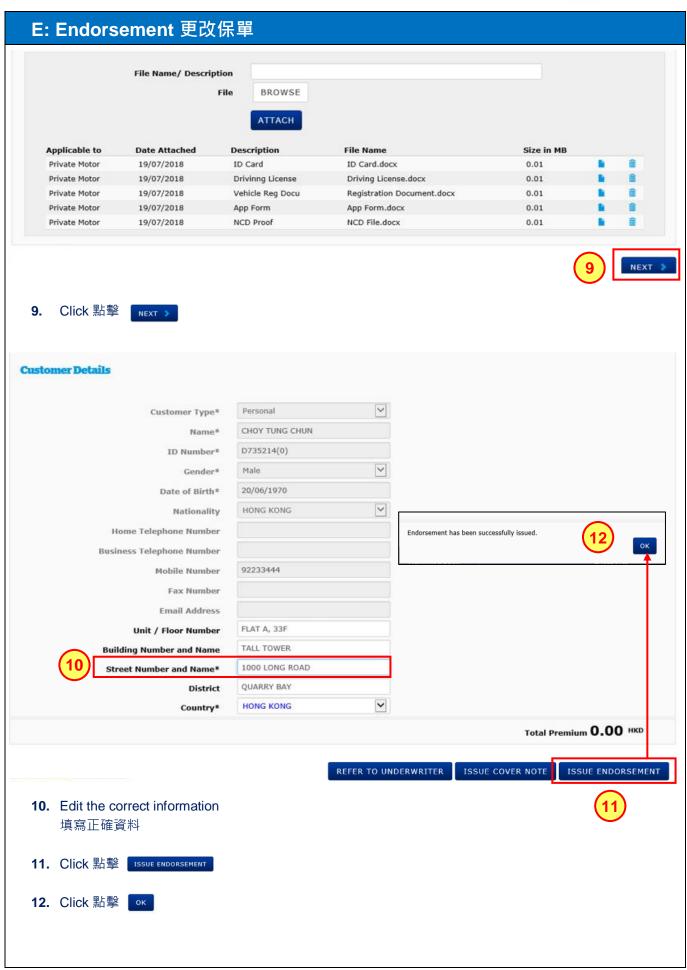
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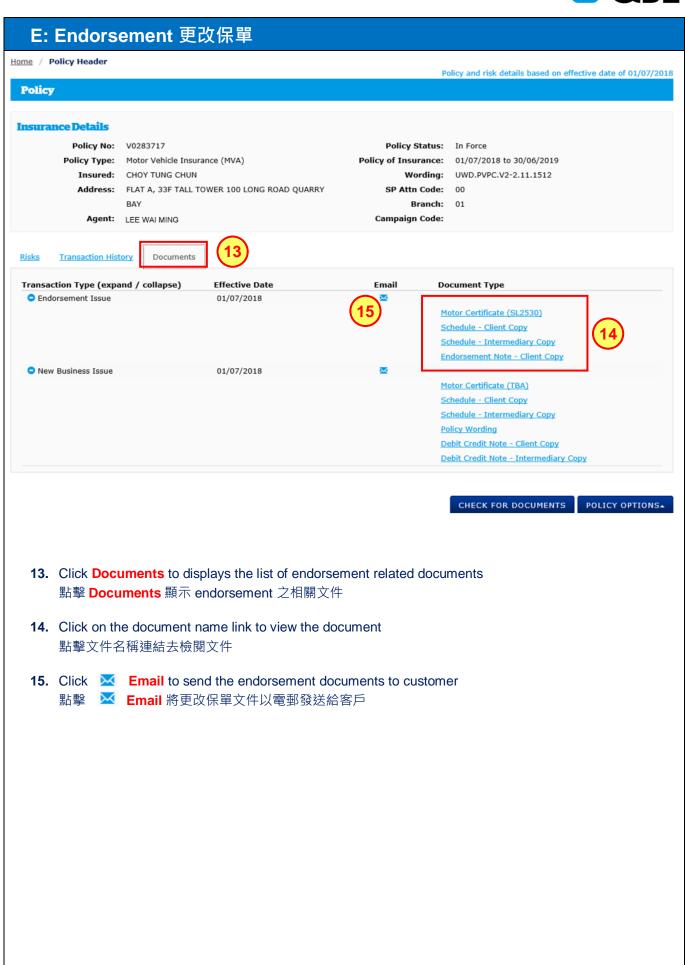
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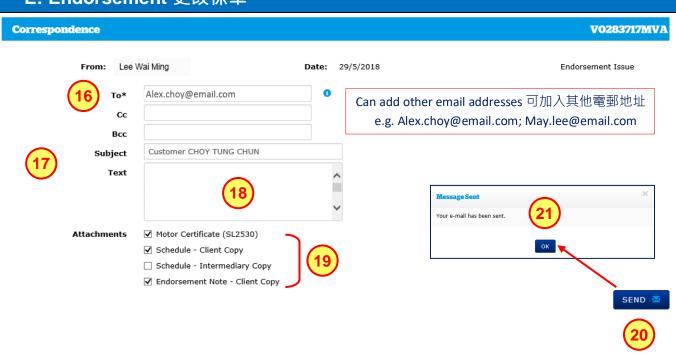




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E: Endorsement 更改保單



- **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 Intermediay 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 Intermediay 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 SEND ▼
- **21.** 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 ok

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Part F

Renew

續保



F: Renewal 續保

There are two ways of renewal:

Qnect 有兩個途徑去續保:

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	16.	Travel Annual
	Insurance (Building & Contents)		
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:

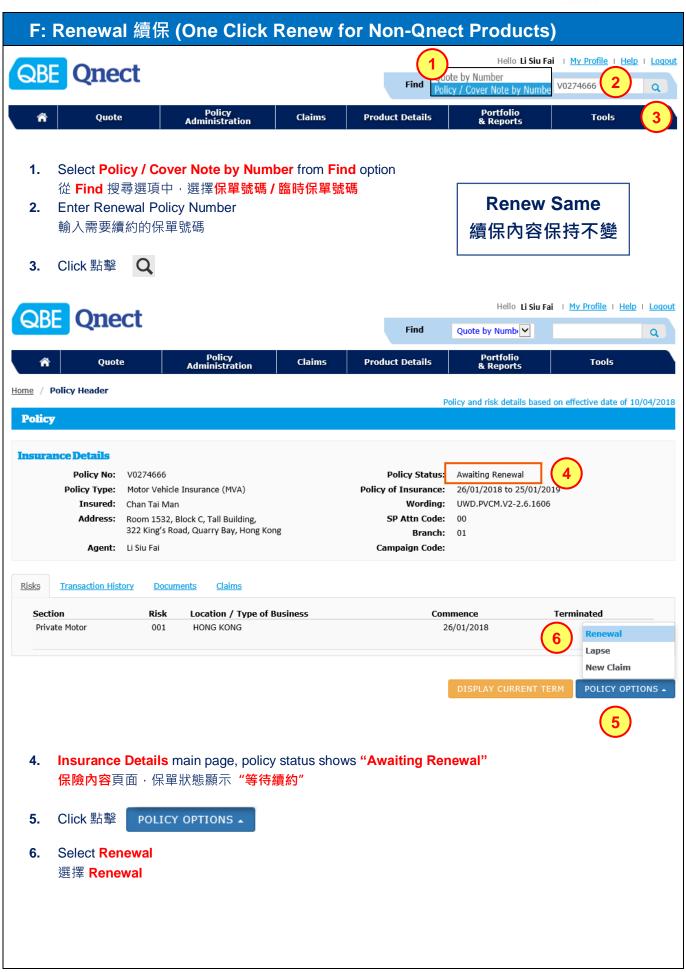
請注意,One Click Renew 並不適用於下列情況:

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

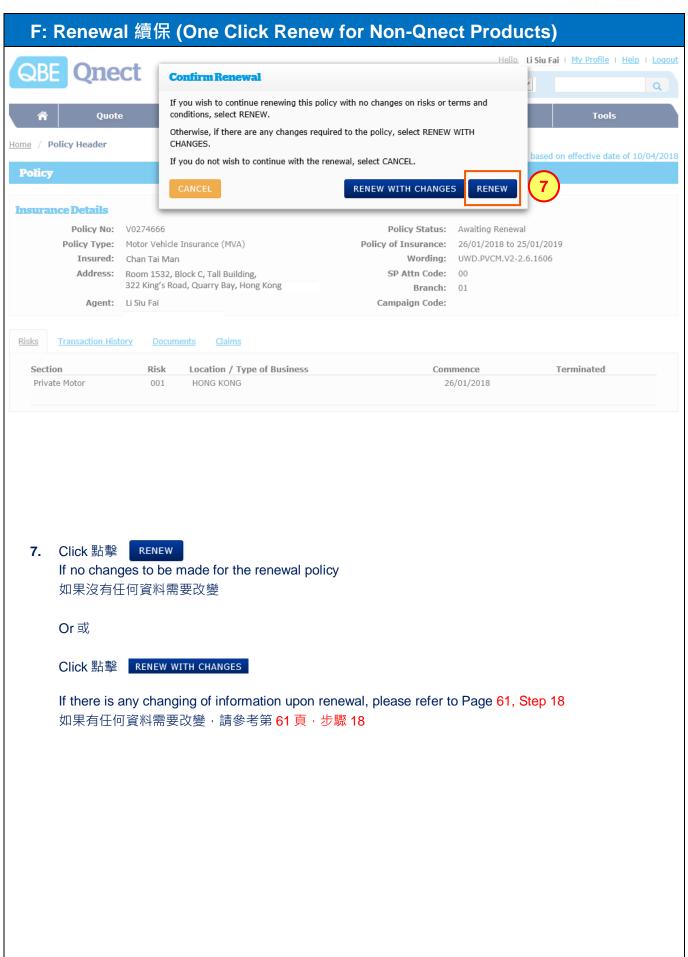
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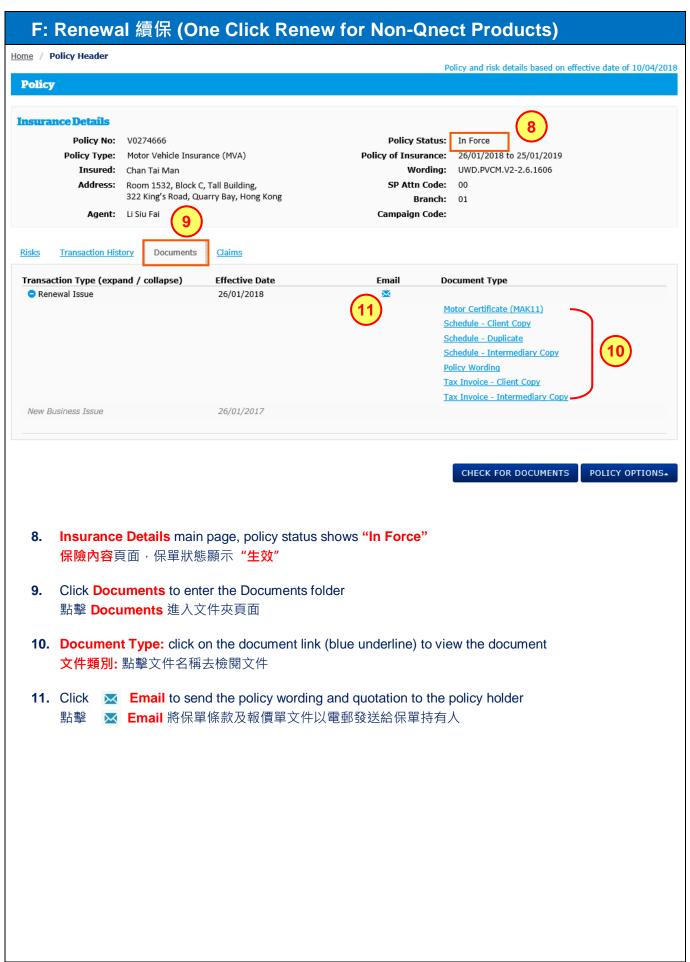
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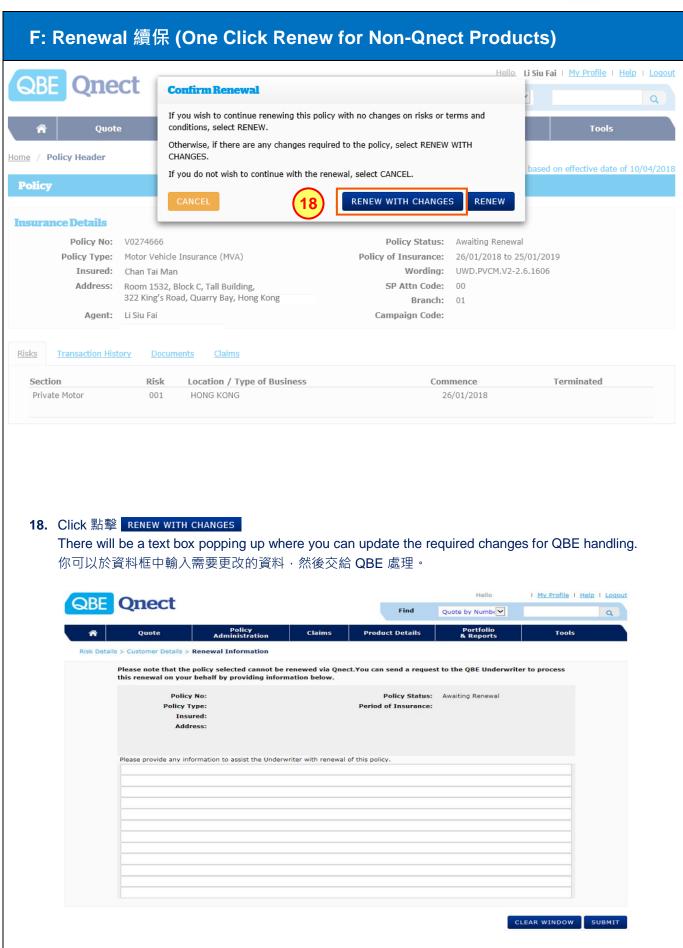
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F: Renewal 續保 (One Click Renew for Non-Qnect Products) Policy Administration Quote Claims **Product Details** Tools Home / Correspondence V0274666MVA Correspondence Renewal Issue From: Li Siu Fai Date: 10/4/2018 To* Сc Bcc Subject Text Message Sent Attachments ☐ Motor Certificate (MAK11) Your e-mail has been sent. ☐ Schedule - Client Copy ☐ Schedule - Duplicate ☐ Schedule - Intermediary Copy Policy Wording ☐ Tax Invoice - Client Copy ☐ Tax Invoice - Intermediary Copy 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 頁面會有顯示電子郵件已發送,然後點擊 ok

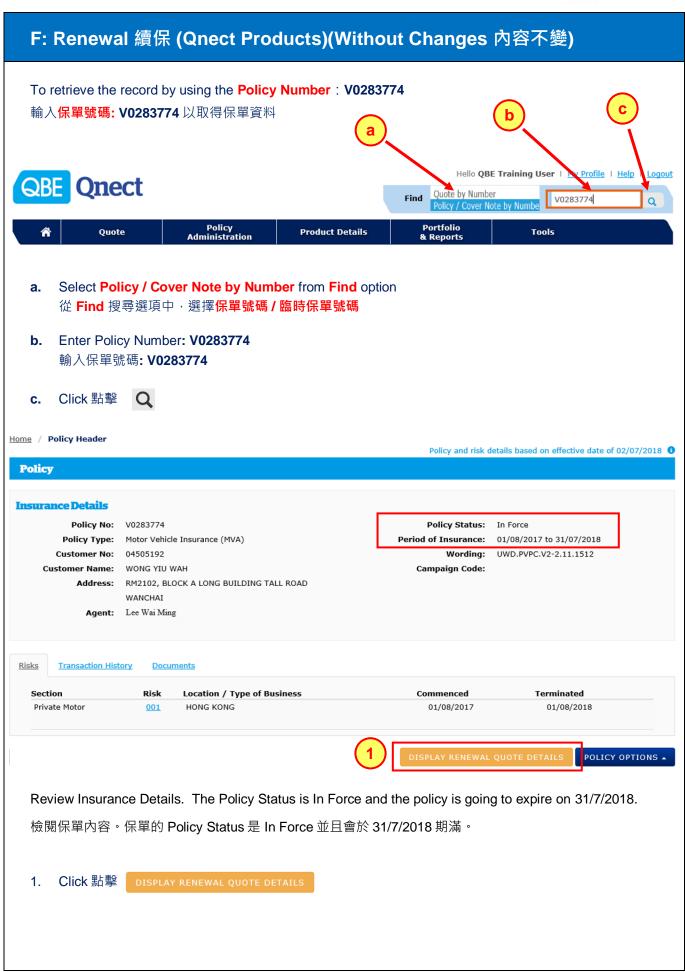
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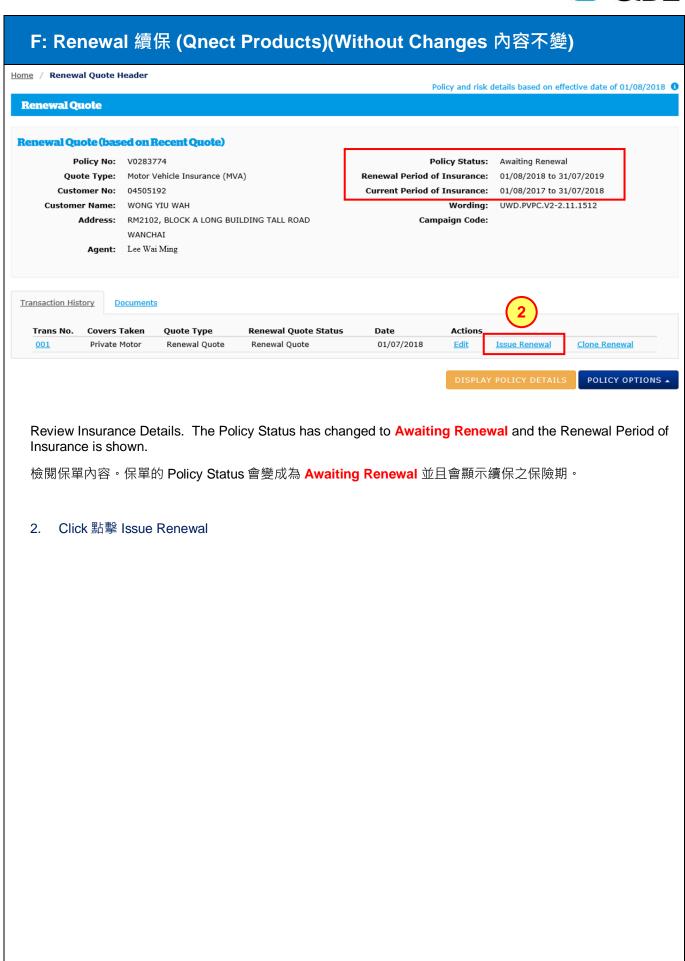
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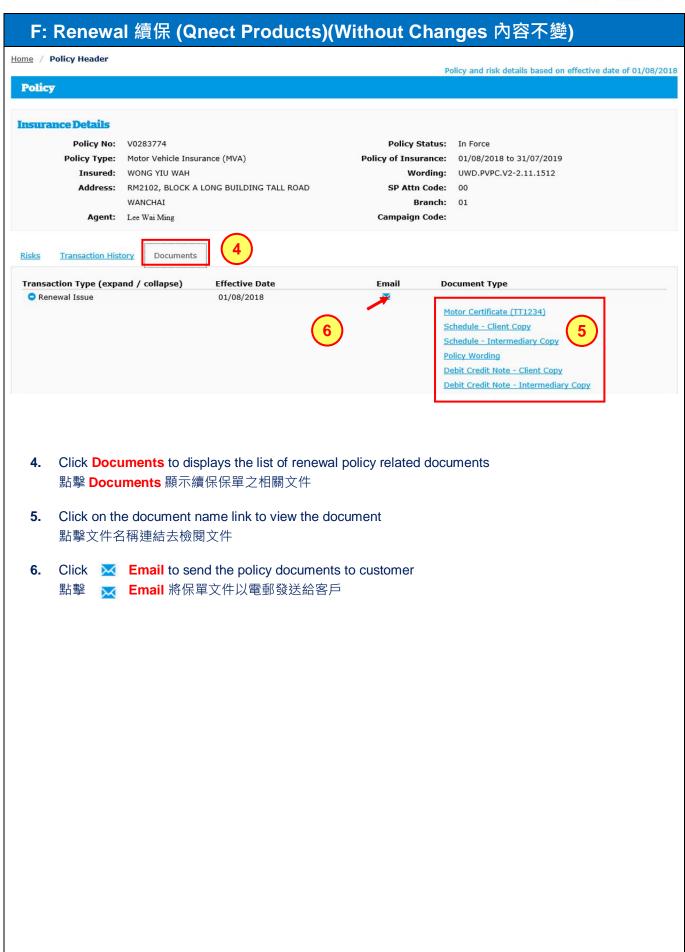
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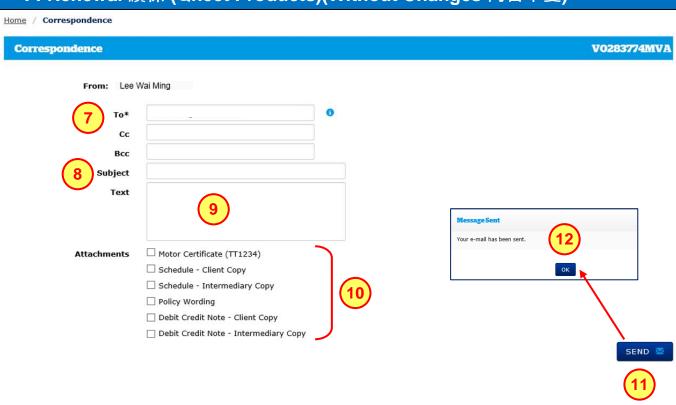




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F: Renewal 續保 (Qnect Products)(Without Changes 內容不變)



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)

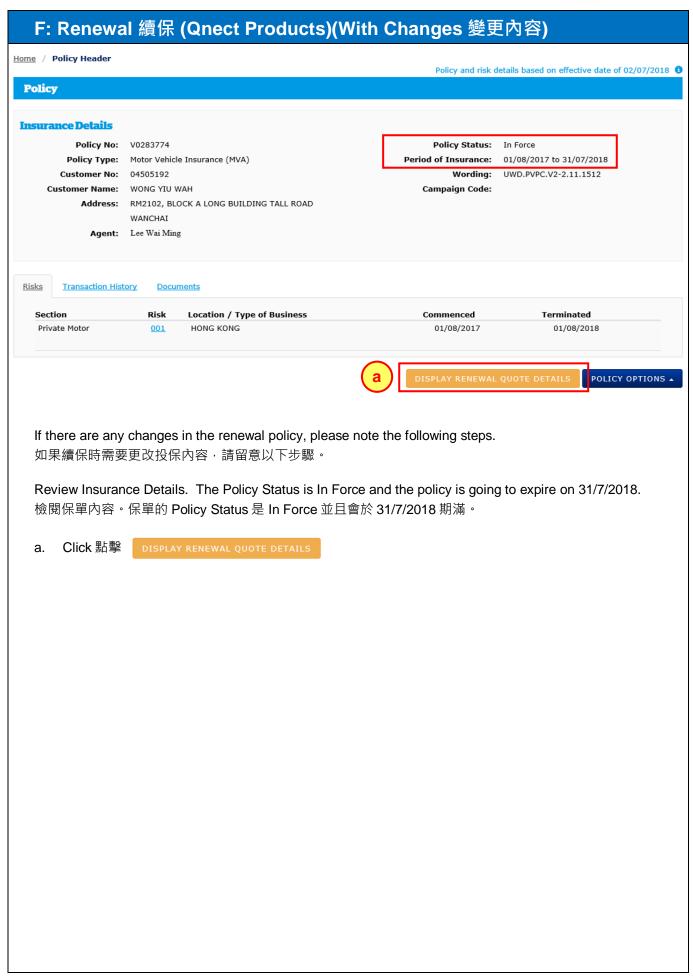
- 8. **Subject** You may enter your own subject **郵件標題** 您可以輸入自定的郵件標題
- **9. Text** You may enter your content **郵件內容** 您可以輸入自定的內容
- **10. Attachments** Select the documents that you want to send to the customer and then check the corresponding boxes

附件文件 - 您選擇要致送客戶的文件, 並剔對應的方格

- 11. Click 點擊 SEND ▼
- **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 OK

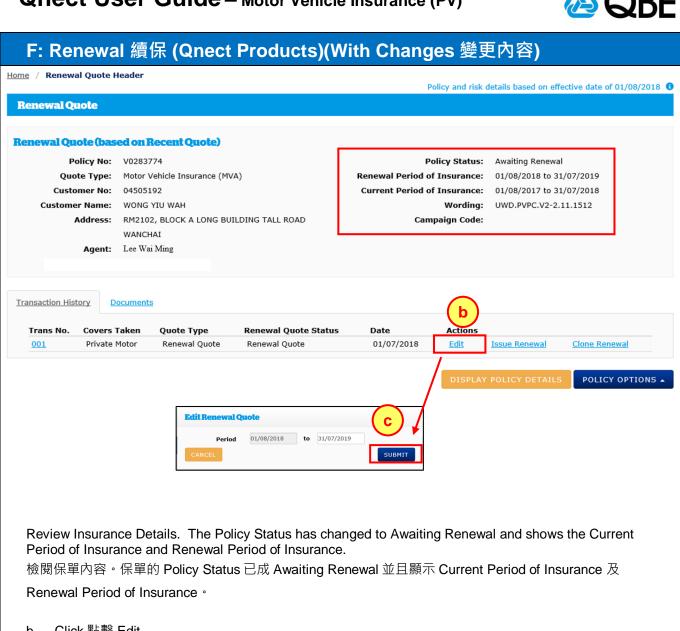
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Click 點擊 Edit b.

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

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



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

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F: Renewal 續保 (Qnect Products)(With Changes 變更內容) **Vehicle Details** Comprehensive Cover Type* Use of Vehicle* Private Use 2014 Mercedes-Benz E400 MY14 W212 Elegance Sedan 4dr +/- 7sp Rear Wheel Drive 3.0T SEARCH FOR VEHICLE Vehicle Description* Make and Model* Mercedes-Benz E400 SEDAN Body Type* Cylinder Capacity* Seating Capacity* TT2345 Registration Mark* 987654321 Engine Number* Chassis Number* 123456789 200000 Sum Insured* Hire Purchase Owner Name ~ 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?* Driver Name Driver Type Date of Birth Yrs Licensed Offences 01/07/1970 Wong Yiu Wah Insured Driver Manager D666333(0) 2 years or more 0 to 3 points deducted • Named Driver 01/07/1970 D666333(0) 0 to 3 points deducted Wong Yiu Wah Manager 2 years or more Chan Pak Hong Named Driver Singer / Entertainer 01/07/1997 Y223344(5) less than 1 year 0 to 3 points deducted **No Claim Discount** No Claim Discount Previous Insurer XYZ Insurance Previous Policy No **Optional Extensions Guangdong Province Extension** HK\$5,000,000 Increase third party property damage limits

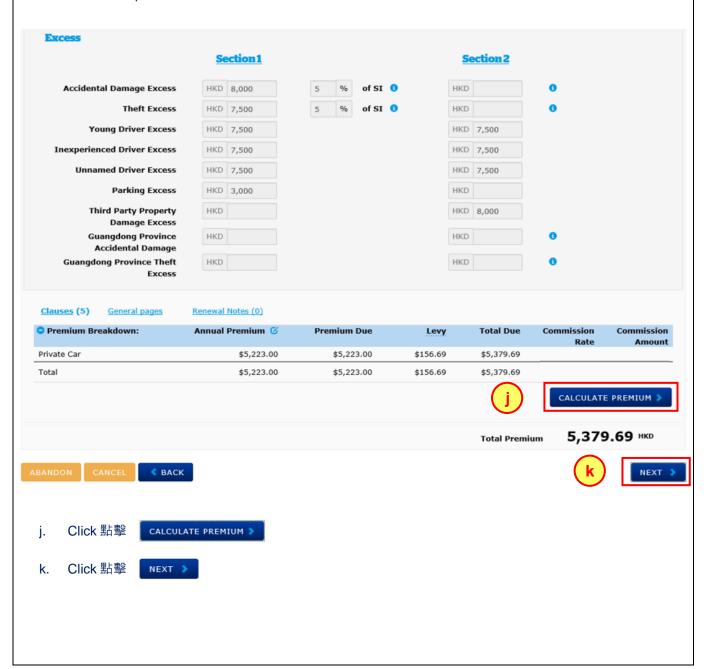
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F: Renewal 續保 (Qnect Products)(With Changes 變更內容)

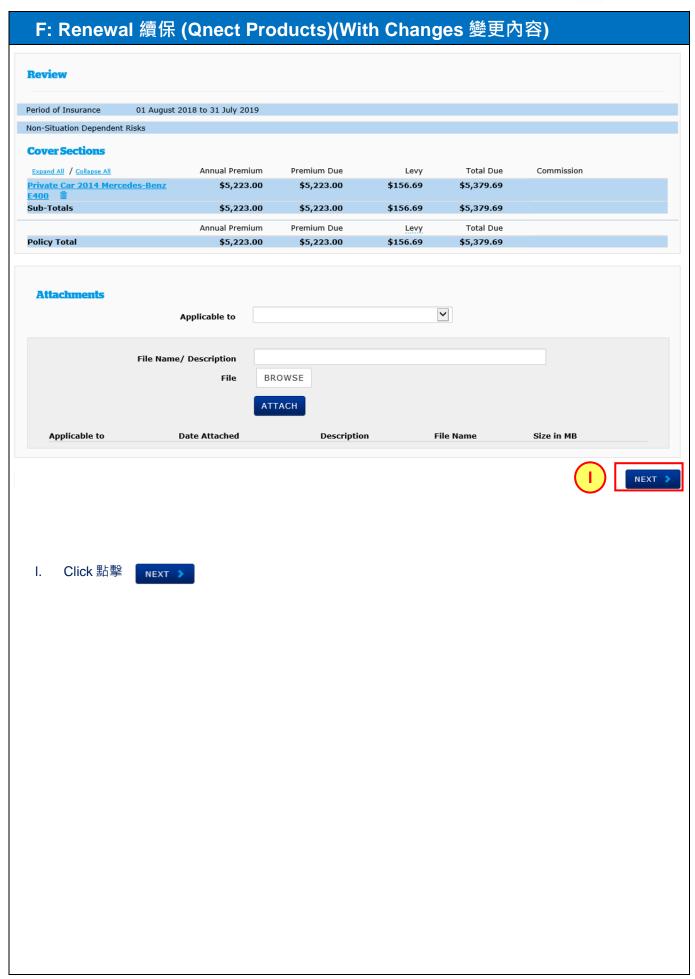
e. You can edit the Vehicle Details (e.g. Sum Insured) 更改受保汽車資料 (例如:投保額)

- 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



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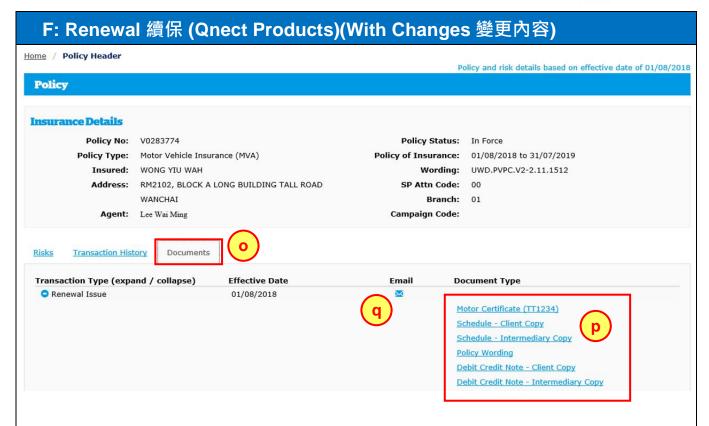
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F: Renewal 續保 (Qnect Products)(With Changes 變更內容) **Customer Details** ~ Customer Type* Personal Check the box if Customer Details are the same as the Insured Driver details WONG YIU WAH Name* D666333(0) ID Number* Gender* Male 01/07/1970 Date of Birth* HONG KONG Nationality Home Telephone Number **Business Telephone Number** 96385274 Mobile Number Fax Number Davidwong@email.com **Email Address** RM2102, BLOCK A Unit / Floor Number LONG BUILDING **Building Number and Name** Street Number and Name* TALL ROAD WANCHAI District HONG KONG Country* Total Premium 5,379.69 HKD ISSUE QUOTE ISSUE RENEWAL COVER NOTE 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. Click 點擊 ISSUE RENEWAL to issue the policy (the premium will be debited from Agent's account) Click 去簽發保單 (保費會於 Agent 的賬戶中記賬結算)

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- 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

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F: Renewal 續保 (Qnect Products)(With Changes 變更內容) V0283774MVA Correspondence To* Cc Bcc Subject Text Attachments ☐ Motor Certificate (TT1234) Schedule - Client Copy Schedule - Intermediary Copy Policy Wording Debit Credit Note - Client Copy Debit Credit Note - Intermediary Copy 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) Subject – You may enter your own subject 郵件標題 - 您可以輸入自定的郵件標題 **Text** – You may enter your content 郵件內容 - 您可以輸入自定的內容 Attachments - You may check the box besides the document's name if you want to send it u. 附件文件 - 您可以剔對應的文件方格,以便發送予客戶 Click 點擊 SEND ▼ 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 ---

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