



## **User Guide**

**--- Personal Accident Insurance ---**

**Version: August 2020**

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## Part A

### Login

登入

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## DO MORE

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

[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

wongyiuwah@gmail.com

Password

Remember my username

[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. [LOGIN](#)

#### 4. If you forget your password, please **“Forgot Password”**

假如您忘記密碼，請  **“Forgot Password”**

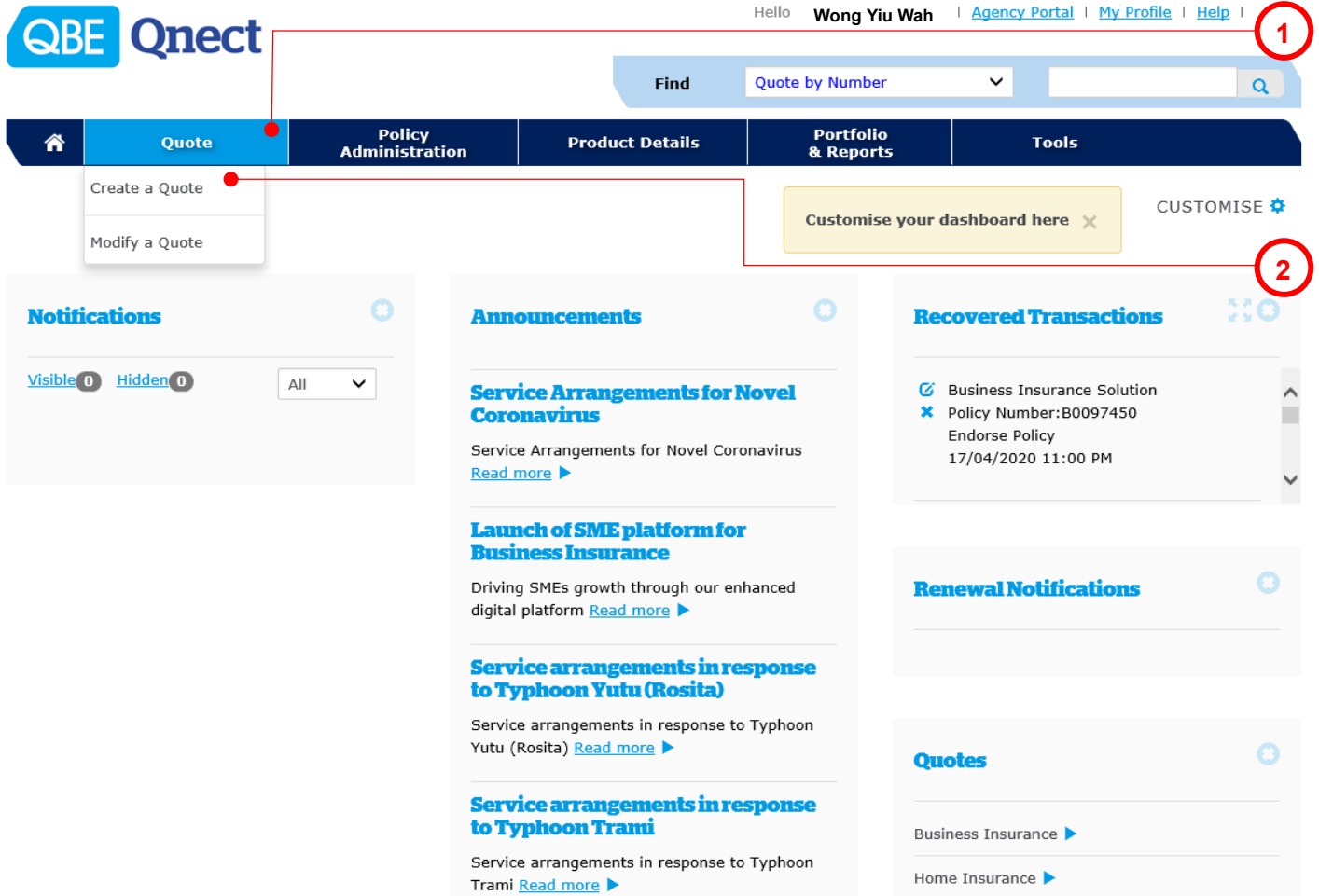
## **Part B**

### **Create Quote**

### **建立報價**

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- Ms. Lily Chow (D123456(7))
- DOB: 31 October 1977
- Occupation: Accounting
- Personal Accident Insurance (Plan D)
- Optional Cover: Hospital Cash & Temporary Total Disablement
- Policy Effective Date: 1 August 2020
- Email Address: lilychow98729872@email.com
- Address: Room C, 30/F, High Tower, 123 Long Road, Wanchai, Hong Kong



The screenshot displays the Qnect user interface. At the top left is the QBE Qnect logo. The top right shows the user's name 'Wong Yiu Wah' and navigation links for 'Agency Portal', 'My Profile', and 'Help'. A search bar is located below the navigation links. The main navigation menu includes 'Quote', 'Policy Administration', 'Product Details', 'Portfolio & Reports', and 'Tools'. The 'Quote' menu is expanded, showing 'Create a Quote' and 'Modify a Quote' options. A 'Customise your dashboard here' button is visible. The dashboard content includes sections for 'Notifications', 'Announcements', 'Recovered Transactions', 'Renewal Notifications', and 'Quotes'. Red circles and lines highlight the 'Quote' menu item and the 'Create a Quote' option, corresponding to the numbered steps in the instructions below.

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”**

## New Quote

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

**Product Type\***  Business Insurance SME  
Domestic Helper Insurance  
Home Insurance  
Motor Vehicle Insurance  
**Personal Accident Insurance**  
Travel Insurance 3

**Account Number\***

**Inception Date\***  4

**Expiry Date\***  5

**Before we start**

1. The Insured Person(s) must be Hong Kong citizen(s) with regular place of residence in Hong Kong.
2. Insured Person(s) must be within the age limit of 18 - 70 years old and renewable up to 75 years old. **Child(ren) to be insured must be 18 years old or below and must be a full time student.**
3. The Insured Person(s) must be direct family members in relationship as husband and wife, parent(s) and child(ren).
4. Occupation(s) of all Insured Person(s) must be clerical or administrative in nature, involving occasional manual work or skillful/semi-skillful work not involving heavy machinery nor hazardous in nature.

By proceeding to generate a quotation, I declare that the business meets the Qnect Criteria and that the Risk Statements are true and complete.  (please tick the box) 6

3. Select **“Personal Accident Insurance”** from Product Type  
從 **“Product Type”** 選項中選擇 **“Personal Accident Insurance”**
4. Select **“Inception Date”** and system will default **“Expiry Date”** as 1 year after **“Inception Date”**  
選擇 **“Inception Date”** · 系統已預設保單之 **“Expiry Date”** 為 **“Inception Date”** 之後一年
5. Review the **“Qnect Criteria”** and **“Risk Statements”**, then check the box if you agree  
檢閱 **“Qnect Criteria”** 及 **“Risk Statements”** · 如同意內容 · 請在方格打剔
6.



Find

Quote by Number



Quote

Policy Administration

Product Details

Portfolio & Reports

Tools

Effective Date: 01/08/2020 • Period of Insurance: 01/08/2020 to 31/07/2021 Account: 10000186 • Quick Quote:

## Personal Accident Quick Quote

### Cover Details

Period of Insurance: 01/08/2020 to 31/07/2021

### Insured Persons

Adult / Child

Adult

Occupation

Accountant

Class

Class 1

Plan

Plan D

Optional Cover(s)

Hospital Cash (daily)

Temporary Total Disablement (per week)

No. of Insured

1

[Add / Clear](#)

Adult / Child	Occupation	Class	Plan	Optional Cover
Adult	Accountant	Class 1	Plan D	Hospital Cash and Temporary Total Disablement

**CALCULATE PREMIUM**

7. Select “**Adult**” or “**Child**”

選擇 “**Adult**” 或 “**Child**”

8. Select “**Occupation**”

選擇 “**Occupation**”

9. Select “**Plan**”

選擇 “**Plan**”

10. Select “**Optional Cover(s)**”

選擇 “**Optional Cover(s)**”

11. Enter “**No. of Insured**”

輸入 “**No. of Insured**”

12. **Add** to update the details into system

**Add** 將資料輸入系統

13. **CALCULATE PREMIUM** to calculate the premium

**CALCULATE PREMIUM** 去計算保費

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Can adjust the commission rate to make the quote more competitive

可調整佣金百分比令報價更具競爭力

14. [Commission Adjustment](#) to adjust the commission rate

[Commission Adjustment](#) 去調整佣金百分比

15. Input new commission rate

輸入新佣金百分比

16. [CALCULATE](#)

17. [SAVE](#)

18. [OK](#)

19. [OBTAIN QUOTE](#)

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## Personal Accident Insurance

### Customer Details

	<b>SEARCH FOR EXISTING CUSTOMER</b>	20
<b>Customer Type*</b>	Personal	
<b>Name*</b>	LILY CHOW	
<b>ID Number*</b>	D123456(7)	
<b>Gender</b>	Female	
<b>Date of Birth*</b>	31/10/1977	
<b>Nationality</b>	HONG KONG	
<b>Mobile Number</b>		21
<b>Email Address</b>	lilychow98729872@email.com	
<b>Floor / Unit No.</b>	ROOM C, 40/F	
<b>Building Number and Name</b>	HIGH TOWER	
<b>Street Number and Name*</b>	123 LONG ROAD	
<b>District</b>	WANCHAI	
<b>Country*</b>	HONG KONG	
	<b>CLEAR</b>	

**Total Premium 0.00 HKD**

**SAVE PENDING** **ISSUE QUOTE**

**ISSUE QUOTE** 22

20. If Ms. Chow is an existing customer, **SEARCH FOR EXISTING CUSTOMER** to retrieve her details

如果周小姐已是現有客戶， **SEARCH FOR EXISTING CUSTOMER** 取得她的資料

21. If Ms. Chow is a new customer, enter her information in the fields provided (\* is compulsory)

如果周小姐是新客戶，按表單內容輸入她的資料 (\* 必須填寫)

22. **ISSUE QUOTE**

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Find

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

Home / Quote Header

## Quote

### Quote Header (based on Recent Quote)

<b>Quote No:</b> 00166196	<b>Period of Insurance:</b> 01/08/2020 to 31/07/2021
<b>Quote Type:</b> Personal Accident Insurance (PAN)	<b>Quote Expiry Date:</b> 11/10/2020
<b>Customer No:</b> 04727302	<b>Wording:</b> UWD.PANPLU.V1.1911
<b>Customer Name:</b> LILY CHOW	<b>Branch:</b> 01
<b>Address:</b> ROOM C, 40/F HIGH TOWER 123 LONG ROAD WANCHAI	
<b>Agent:</b> Wong Yiu Wah	
<b>Agent No:</b> 10000000	

[Transaction History](#)

[Documents](#)

Effective Date	Email	Quote Type	Quote Status	Document Type
01/08/2020		Quick Quote	Issued	<a href="#">Policy Wording Quotation</a>

[CHECK FOR DOCUMENTS](#)

- 23. [Documents](#) to enter the documents folder  
 [Documents](#) 進入文件夾頁面
- 24. “Document Type”  
 document link to view the document  
 文件連結去檢閱文件
- 25. to send the “Quotation” to the customer  
 將 “Quotation” 發送給客戶

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Find

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Home / Correspondence

**Correspondence** 00166196PAN

From: **Wong Yiu Wah** Date: 13/7/2020 Quick Quote

To\*  26

Cc

Bcc

Subject  27

Text  28

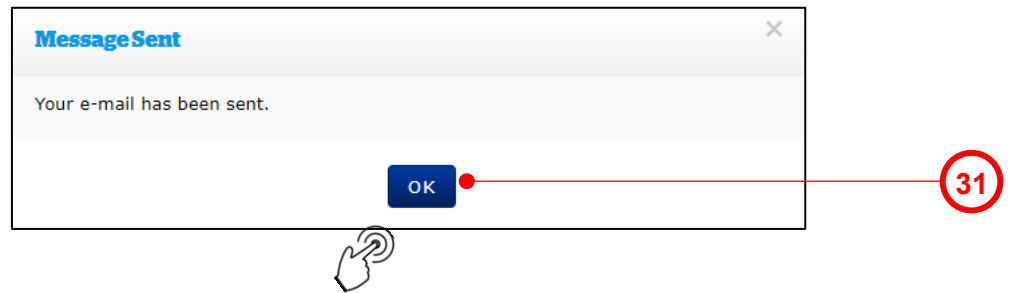
Attachments **Policy Documents** 29

Policy Wording

Quotation

30

26. **“To”** – System will default it to be the customer email address  
(can add other email addresses, using semicolon ( ; ) to separate them)  
“To” – 系統會預設它為客戶之電郵地址 (可以加入其他電郵地址 ; 並以 ( ; ) 相隔)
27. **“Subject”** – System will default the **“Subject”** to be the customer name but you may enter your own subject  
“Subject” – 系統會預設 **“Subject”** 為客戶名稱，但您可以輸入自定之郵件標題
28. **“Text”** – System will default the email content but you may enter your own email content  
“Text” – 系統會預設郵件內容，但您可以輸入自定之郵件內容
29. **“Attachments”** – System will default **“Policy Documents”** to be sent and you may uncheck the box besides the document’s name if you do not want to send it  
“Attachments” – 系統已預設附上 **“Policy Documents”**，但如該文件是不需要，可以剔除對應之方格
30.



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

## Customer LILY CHOW

QnectAsia@qbe.com

To lilychow98729872@email.com 



The following documents are attached to this email.

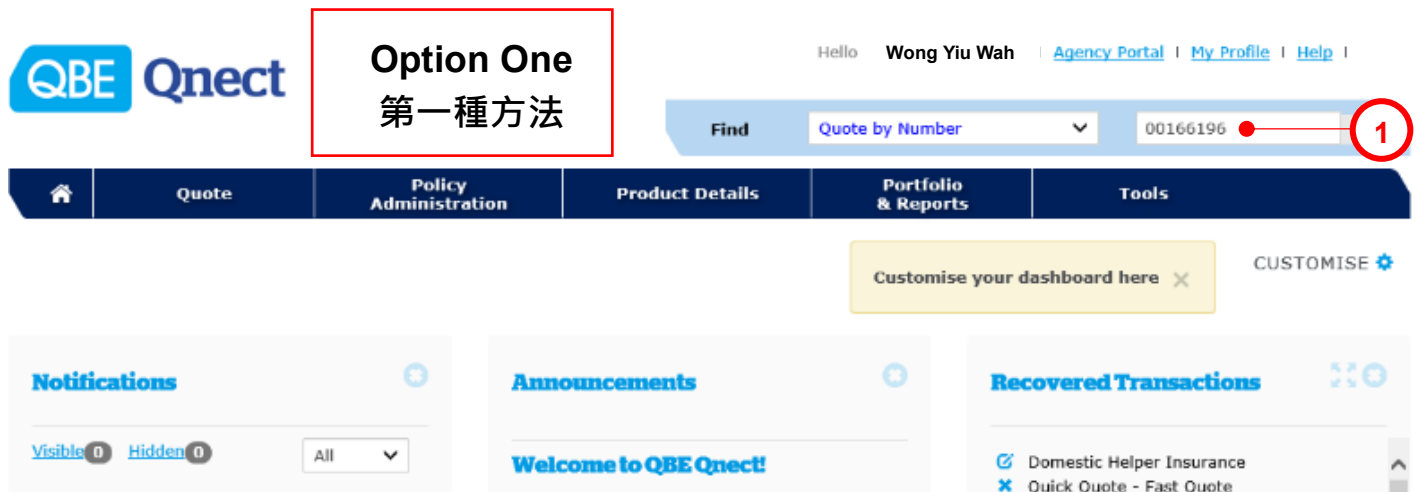


32. The customer received the “**Policy Documents**” email with the attachments  
客戶收到 “**Policy Documents**” 電郵及附件

## Part C

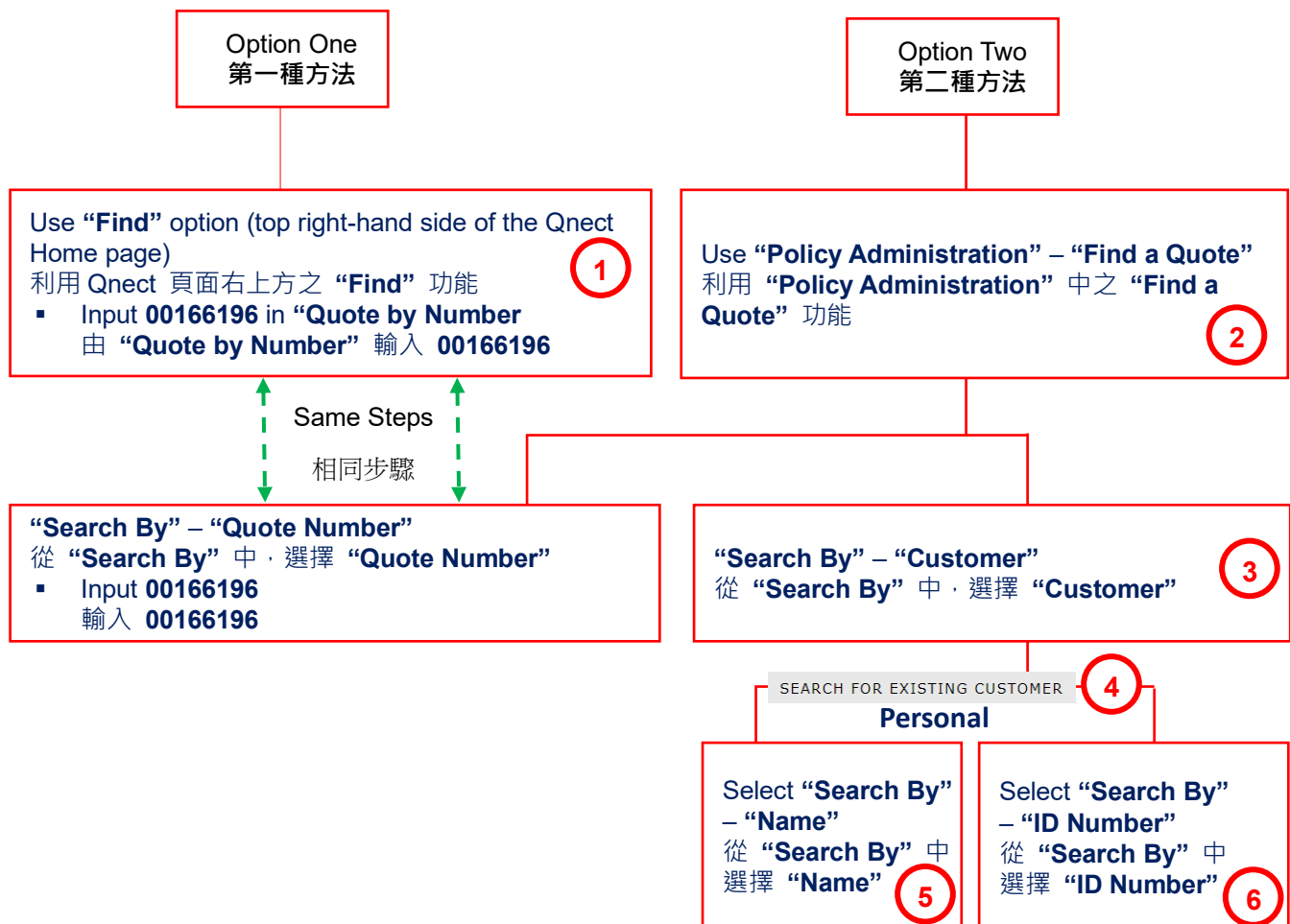
### Issue Policy

### 簽發保單



## Option One 第一種方法

There are two options of find an existing Quote in Qnect in order to issue the Policy:



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## Option Two 第二種方法

Find

Navigation: Home | Quote | **Policy Administration** | Product Details | Portfolio & Reports | Tools

Policy Administration dropdown menu:

- Create a Marine Declaration
- Find a Quote
- Find a Policy / Cover Note
- Endorse a Policy
- Find Renewal Policies

Customise your dashboard here

Notifications: Visible  Hidden

Recovered Transactions: Motor Vehicle Insurance :V0372109

### Quote Search

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

Search By:   Include Expired Quotes

### Search Results

Quote Number	Client Name	Policy type	Status	Expires

### Search Customer

Customer Type:

Search By:

Name:

### Search Customer

Customer Type:

Search By:

ID Number:

### Search Customer

Customer Type:

Search By:

Name:

### Search Customer

Customer Type:

Search By:

ID Number:

### Search Results

Quote Number	Client Name	Policy type	Status	Expires
<a href="#">00166196</a>	LILY CHOW	()	Issued	31/07/2021

## Quote

### Quote Header (based on Recent Quote)

<b>Quote No:</b> 00166196	<b>Period of Insurance:</b> 01/08/2020 to 31/07/2021
<b>Quote Type:</b> Personal Accident Insurance (PAN)	<b>Quote Expiry Date:</b> 11/10/2020
<b>Customer No:</b> 04727302	<b>Wording:</b> UWD.PANPLU.V1.1911
<b>Customer Name:</b> LILY CHOW	<b>Branch:</b> 01
<b>Address:</b> ROOM C, 40/F HIGH TOWER 123 LONG ROAD WANCHAI	
<b>Agent:</b> Wong Yiu Wah	
<b>Agent No:</b> 10000000	

Transaction History | [Documents](#)

Trans No.	Covers Taken	Quote Type	Quote Status	Date	Actions
<a href="#">001</a>	Personal Accident	Quick Quote	Issued	13/07/2020	<a href="#">Edit</a> <a href="#">Convert to Full Binding Quote</a> <a href="#">Clone</a>

**Convert Quote** ✕

**Inception Date\***

**Expiry Date\***

7. “Quote Header” main page  
“Quote Header” 頁面
8. [Convert to Full Binding Quote](#)
9. Review “Inception Date” and “Expiry Date”  
檢閱 “Inception Date” 及 “Expiry Date”
10.

**Personal Accident**

**Insured Person 1** REMOVE

Surname / Given name\*

Adult / Child\*

Date of Birth (DD/MM/YYYY)\*

HK ID Number

Plan\*

Occupation\*

Class

Optional Cover(s)  
 Hospital Cash (daily)  
 Temporary Total Disablement (per week)

**ADD INSURED PERSON +**

Premium Breakdown:	Annual Premium	Premium Due	Levy	Total Due
Total	\$2,670.00	\$2,670.00	\$2.27	\$2,672.27

**CALCULATE PREMIUM >**

**Total Premium 2,672.27 HKD**

11. Review the details of “Insured Person”

檢閱 “Insured Person” 之資料

12. **NEXT >**

13. Answer “Claims and Insurance History Questions”

回答 “Claims and Insurance History Questions”



**Claims and Insurance History Questions**

Has any insured person:

Ever made any Personal Accident claim(s) over HK\$1,000 against any insurance company in the last 3 years?  Yes  No

Has any/Is any insured person:

Ever been declined or imposed with special terms under any Personal Accident Insurance?  Yes  No

Currently not in good health or suffering from any physical deformity or disease?  Yes  No

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**Customer Details**

SEARCH FOR EXISTING CUSTOMER

<b>Customer Type*</b>	<input type="text" value="Personal"/>
<b>Name*</b>	<input type="text" value="LILY CHOW"/>
<b>ID Number*</b>	<input type="text" value="D123456(7)"/>
<b>Gender</b>	<input type="text" value="Female"/>
<b>Date of Birth*</b>	<input type="text" value="31/10/1977"/>
<b>Nationality</b>	<input type="text" value="HONG KONG"/>
<b>Home Telephone Number</b>	<input type="text"/>
<b>Business Telephone Number</b>	<input type="text"/>
<b>Mobile Number</b>	<input type="text"/>
<b>Fax Number</b>	<input type="text"/>
<b>Email Address</b>	<input type="text" value="lilychow98729872@email.com"/>
<b>Floor / Unit No.</b>	<input type="text" value="ROOM C, 40/F"/>
<b>Building Number and Name</b>	<input type="text" value="HIGH TOWER"/>
<b>Street Number and Name*</b>	<input type="text" value="123 LONG ROAD"/>
<b>District</b>	<input type="text" value="WANCHAI"/>
<b>Country*</b>	<input type="text" value="HONG KONG"/>

**Total Premium 2,6**

Customer Payment

Pay Now

Issue Policy

14. Review “Customer Details”

檢閱 “Customer Details”

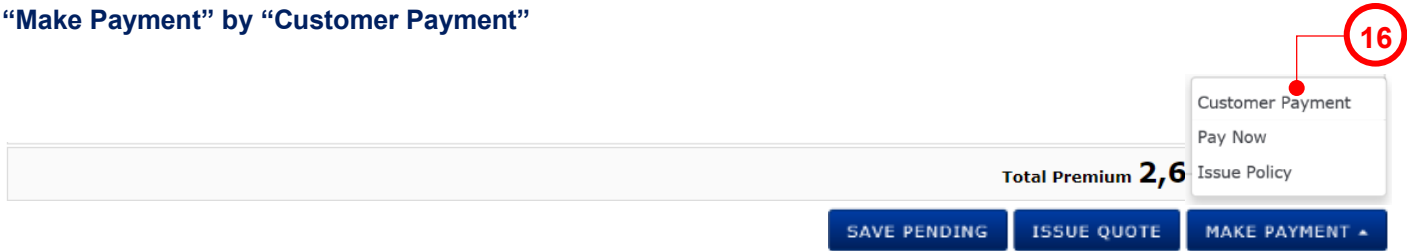
15. 

Three options for “Make Payment”, namely “Customer Payment”, “Pay Now” and “Issue Policy”

“Make Payment” 有三種模式以供選擇，包括 “Customer Payment”, “Pay Now” 及 “Issue Policy”

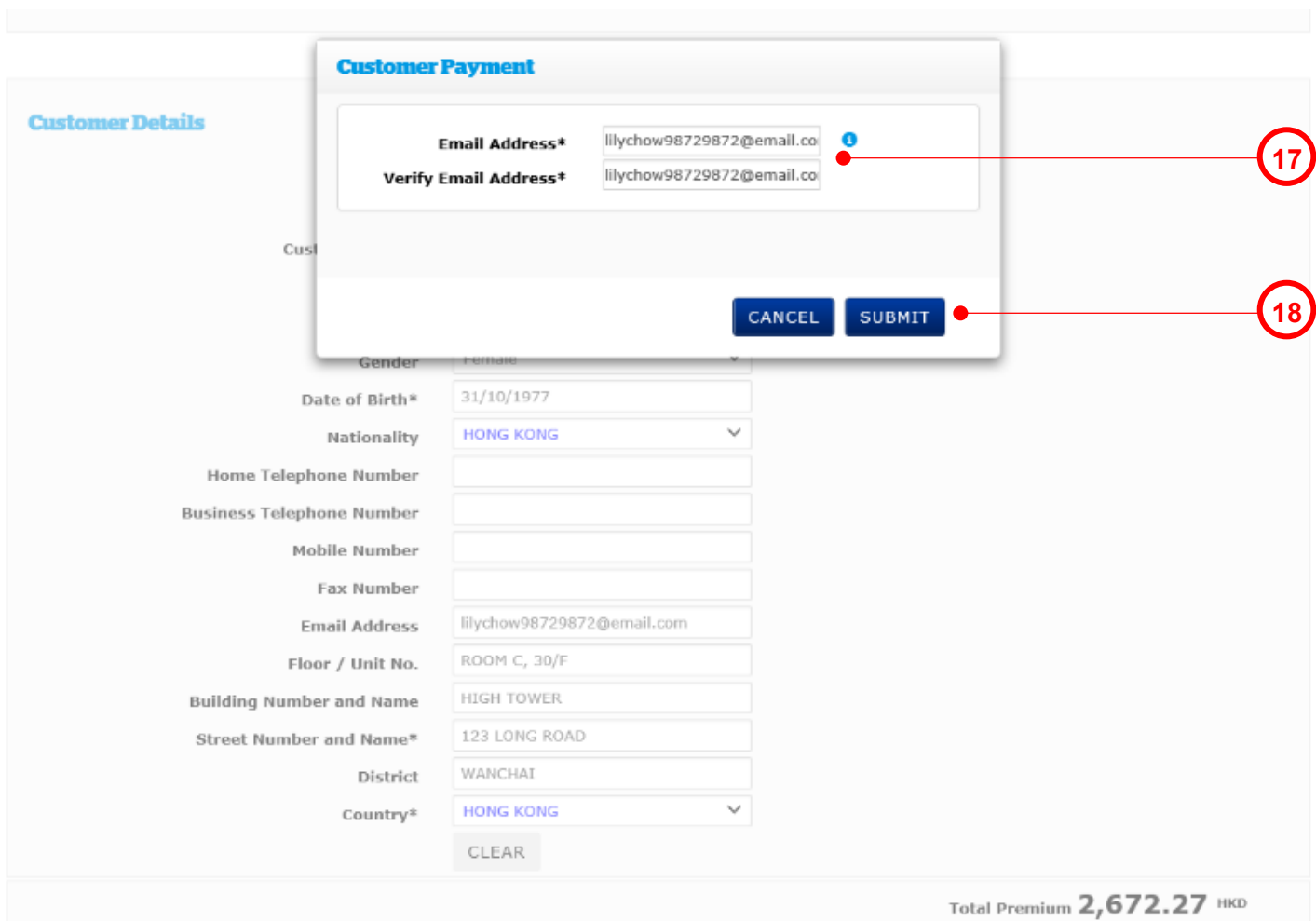
- If you select “Customer Payment”, please refer to Step 16 to Step 31  
如果您選擇 “Customer Payment”，請參考步驟 16 至步驟 31
- If you select “Pay Now”, please refer to Step 32 to Step 48  
如果您選擇 “Pay Now”，請參考步驟 32 至步驟 48
- If you select “Issue Policy”, please refer to Step 49 to Step 60  
如果您選擇 “Issue Policy”，請參考步驟 49 至步驟 60

## “Make Payment” by “Customer Payment”



16. Customer selects “Customer Payment”

客戶選擇 “Customer Payment”



17. Verify customer’s email address

核對客戶電郵地址

18.  

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## Policy

**Insurance Details**

<b>Policy No:</b> A0614196	<b>Policy Status:</b> Pending New Business
<b>Policy Type:</b> Personal Accident Insurance (PAN)	<b>Policy of Insurance:</b> 01/08/2020 to 31/07/2021
<b>Insured:</b> LILY CHOW	<b>Wording:</b> UWD.PANPLU.V1.1911
<b>Address:</b> ROOM C, 40/F HIGH TOWER 123 LONG ROAD WANCHAI	<b>SP Attn Code:</b> 00
<b>Agent:</b> Wong Yiu Wah	<b>Branch:</b> 01

19

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

Section	Risk	Location / Type of Business	Commence	Terminated
Personal Accident	<a href="#">001</a>	HONG KONG	01/06/2020	

**POLICY OPTIONS** ▾

19. The “Policy Status” will show “Pending New Business”

“Policy Status” 會顯示 “Pending New Business”

- The customer will receive a “Payment Request Email” and can use the “Make Payment” link enclosed to settle the premium

客戶收到 “Payment Request Email” 後，可利用隨件附上之 “Make Payment” 連結去繳付保費

## Qnect - QBE Personal Accident Plus Payment request for A0614196

QnectAsia@qbe.com

To lilychow98729872@email.com

Dear LILY CHOW,

20

Thank you for insuring with QBE.

Your QBE Personal Accident Plus policy has been successfully processed for the period from 1 Aug 2020 to 31 Jul 2021.

To ensure the validity of your insurance coverage, please click on the "Make Payment" link below to make payment. This link will be valid for the next 5 days (upon receiving this email) or up to and including the Inception Date of your policy, whichever is sooner. Please ensure you complete the premium payment process, otherwise, your insurance cover will not be in force.

Should you have any queries, please do not hesitate to contact your intermediary Wong Yiu Wah.

[Make Payment >](#)



20. Customer receives the “**Payment Request Email**”

客戶收到 “**Payment Request Email**”

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## Personal Accident Insurance Payment - Policy Summary - A0614196

### Policy Summary

#### Important Notice

- The Insured Person(s) agree(s) that all answers and statements made in the application are accurate in every respect and no information has been withheld which is likely to affect acceptance of this application.
- The application and declaration shall be the basis of the policy and considered as being incorporated therein.
- The terms, conditions and exclusions as set out in the Policy are accepted.
- The Insured Person (s) has/ have read and consented to the [Personal Information Collection Statement](#)

21

I agree with the declarations and confirm the details contained in this page are true and correct.

22

Insured			
Customer No	04727302		
Full Name	LILY CHOW		
Insurance Details			
Inception Date	01/08/2020	Expiry Date	31/07/2021
Risk Details			
Surname / Given Name	Class	Plan	Optional Covers
LILY CHOW	Class 1	Plan D	Hospital Cash (daily) and Temporary Total Disablement (per week)

If there are any errors or omission, please click on 'Abandon' and contact your intermediary. Otherwise please make the payment.

Personal Accident Insurance Policy - (PA Plus)

Premium HKD 2,672.27

MAKE PAYMENT >



23

21. Customer reviews the “Importance Notice” under the “Policy Summary”

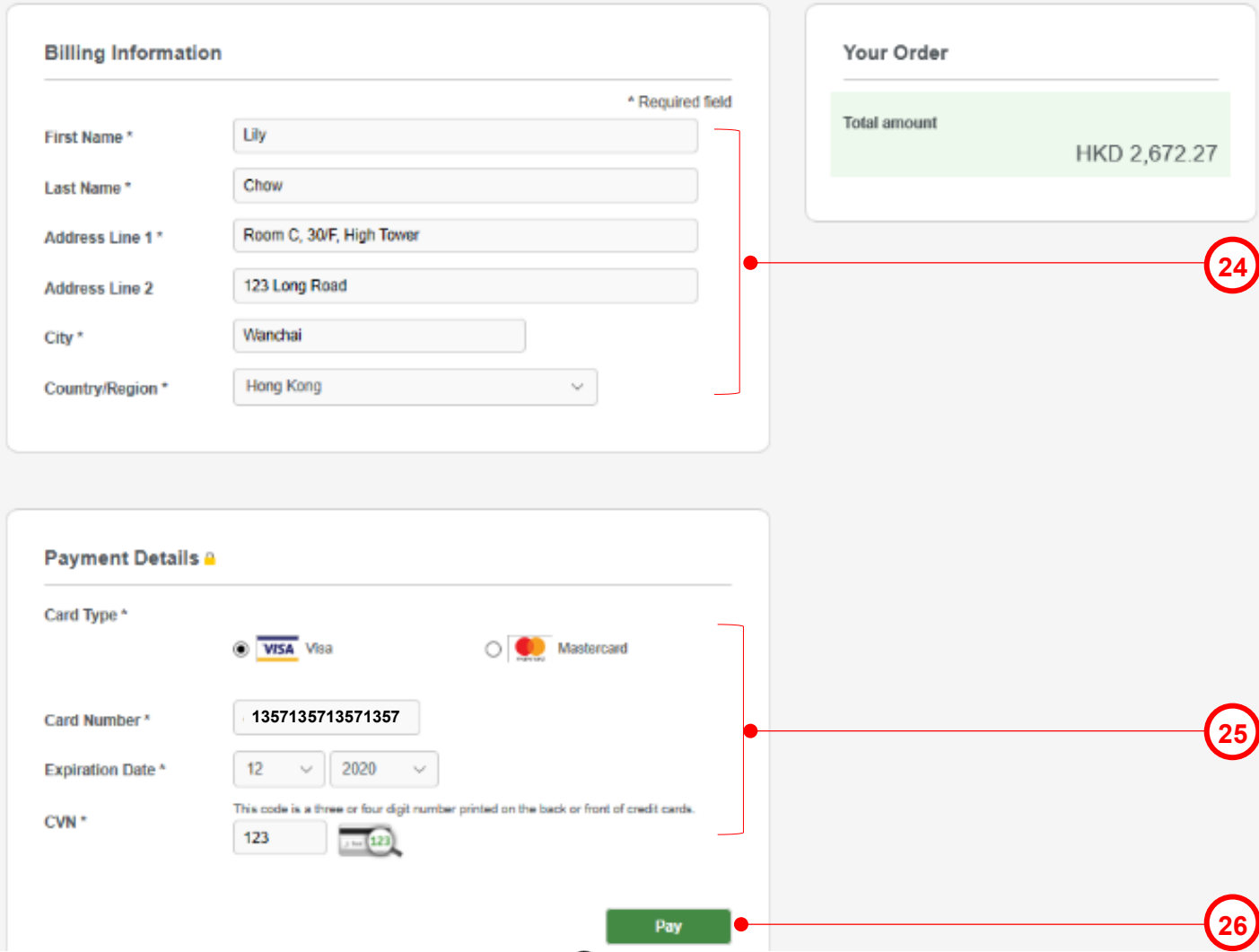
客戶檢閱 “Policy Summary” 內之 “Importance Notice”

22. Customer agrees to “Policy Summary” and checks the box

客戶同意 “Policy Summary” 並在方格內打勾

23. MAKE PAYMENT >





The screenshot displays a checkout page with three main sections:

- Billing Information:** Fields for First Name (\* Lily), Last Name (\* Chow), Address Line 1 (\* Room C, 30F, High Tower), Address Line 2 (123 Long Road), City (\* Wanchai), and Country/Region (\* Hong Kong). A note indicates that fields with an asterisk are required.
- Payment Details:** Card Type selection (VISA selected, Mastercard unselected), Card Number (\* 1357135713571357), Expiration Date (\* 12/2020), and CVN (\* 123). A note explains that the CVN is a three or four digit number printed on the back or front of credit cards.
- Your Order:** A summary box showing the Total amount as HKD 2,672.27.

A green **Pay** button is located at the bottom right of the form, with a hand cursor icon pointing to it.

24. Customer inputs the “**Billing Information**”

客戶輸入 “**Billing Information**”

25. Customer inputs the “**Payment Details**”

客戶輸入 “**Payment Details**”

26.  

## Payment Confirmation

### Payment Confirmation

Thank you for insuring with QBE.  
Your policy has been issued. Policy documents will be sent to your contact email address in 24 hours.  
You may print payment confirmation details for your reference.

#### Policy Details

Policy Number	A0614196 - PAN
Insured	LILY CHOW
Period of Insurance	From 1 Aug 2020 To 31 Jul 2021
Receipt number	5946085076186493403005
Amount	HKD 2,672.27

27

CLOSE



28

27. Customer receives the “**Payment Confirmation**”

客戶收到 “**Payment Confirmation**”

28.  [CLOSE](#)

29. At the same time, Customer receives the “**Payment Receipt**” email

與此同時，客戶收到 “**Payment Receipt**” 電郵

## Qnect - QBE Personal Accident Plus A0614196 Payment Receipt - LILY CHOW

QnectAsia@qbe.com

To lilychow98729872@email.com

29

Thank you for insuring with QBE.

Your policy has been issued. Policy documents will be sent to your contact email address in 24 hours.

You may print policy confirmation details for your reference.

#### Policy Details

Policy Number : A0614196 - PAN

Insured : LILY CHOW

Period of Insurance : From: 1 Aug 2020 To: 31 Jul 2021

Payment Amount : HKD 2,672.27

Receipt Number : 5946085076186493403005

Made possible



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## Qnect - QBE Personal Accident Plus A0614196 - Policy Document

QnectAsia@qbe.com

To Lilychow98729872@email.com

30



Dear LILY CHOW,

Thank you for insuring with QBE Insurance. 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 – Wong Yiu Wah.

Please find your policy documents attached.

Made possible



30. Customer receives the “**Policy Document**” email

客戶收到 “**Policy Document**” 電郵

31. Agent receives the “**Payment Receipt**” email

Agent 收到 “**Payment Receipt**” 電郵

## QNECT - QBE Personal Accident Plus A0614196 Payment Receipt- LILY CHOW

QnectAsia@qbe.com

To Wong Yiu Wah

31

Dear Wong Yiu Wah,

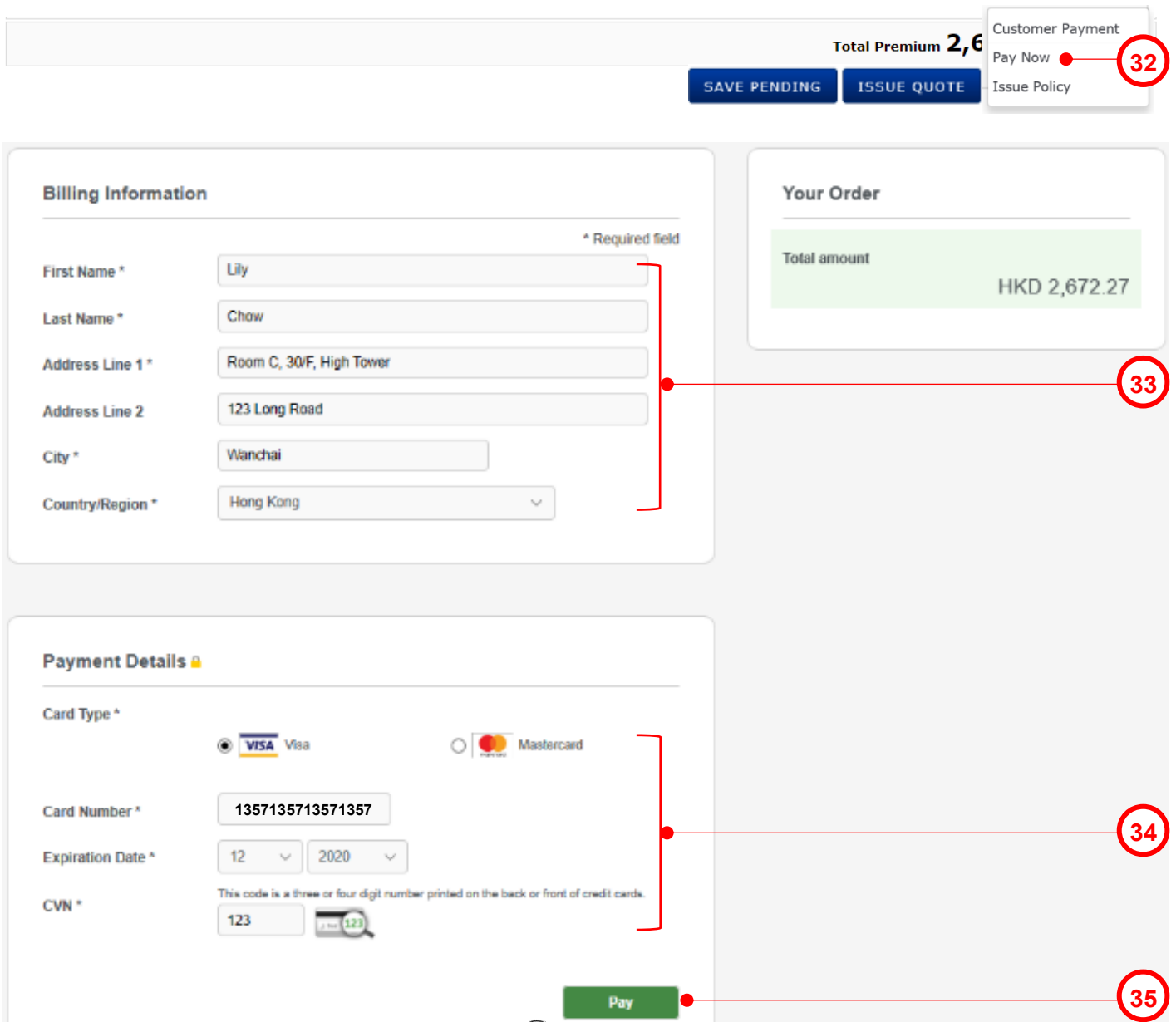
Please note that the insured (LILY CHOW) online credit card payment for Policy A0614196 with payment amount HKD 2,672.27 was successful. The policy documents will be sent to the insured under a separate email shortly. If you have any further queries, please contact your designated account handler.

Made possible



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## “Make Payment” by “Pay Now”



32. Customer selects “Pay Now”

客戶選擇 “Pay Now”

33. Customer inputs the “Billing Information”

客戶輸入 “Billing Information”

34. Customer inputs the “Payment Details”

客戶輸入 “Payment Details”

35.  

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## Payment Confirmation

### Payment Confirmation

Thank you for insuring with QBE.  
Your policy has been issued. Policy documents will be sent to your contact email address in 24 hours.  
You may print payment confirmation details for your reference.

#### Policy Details

Policy Number	A0614196 - PAN
Insured	LILY CHOW
Period of Insurance	From 1 Aug 2020 To 31 Jul 2021
Receipt number	5946085076186493403005
Amount	HKD 2,672.27

36

CLOSE



37

36. Customer receives the “Payment Confirmation”

客戶收到 “Payment Confirmation”

37.  [CLOSE](#)

38. At the same time, Agent receives the “Payment Receipt” email

與此同時，Agent 收到 “Payment Receipt” 電郵

## Qnect - QBE Personal Accident Plus A0614196 Payment Receipt - LILY CHOW

QnectAsia@qbe.com

To Wong Yiu Wah

38

Thank you. Your payment has been accepted.

This is your confirmation for:

Policy Details

Policy Number : A0614196 - PAN

Insured : LILY CHOW

Period of Insurance : From: 1 Aug 2020 To: 31 Jul 2021

Payment Amount : HKD 2,672.27

Receipt Number : 5946085076186493403005

Made possible



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## Policy

### Insurance Details

**Policy No:** A0614196  
**Policy Type:** Personal Accident Insurance (PAN)  
**Insured:** LILY CHOW  
**Address:** ROOM C, 40/F HIGH TOWER 123 LONG ROAD  
 WANCHAI  
**Agent:** Wong Yiu Wah

**Policy Status:** In Force  
**Policy of Insurance:** 01/08/2020 to 31/07/2021  
**Wording:** UWD.PANPLU.V1.1911  
**SP Attn Code:** 00  
**Branch:** 01

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

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Transaction Type (expand/collapse)	Effective Date	Email	Document Type
New Business Issue	01/08/2020	<input checked="" type="checkbox"/>	<a href="#">Schedule - Client Copy</a> <a href="#">Schedule - Intermediary Copy</a> <a href="#">Policy Wording</a> <a href="#">Debit Credit Note - Client Copy</a> <a href="#">Debit Credit Note - Intermediary Copy</a> <a href="#">Summary of Benefits</a> <a href="#">Receipt</a>

40

41

39. [Documents](#) to enter the documents folder

[Documents](#) 進入文件夾頁面

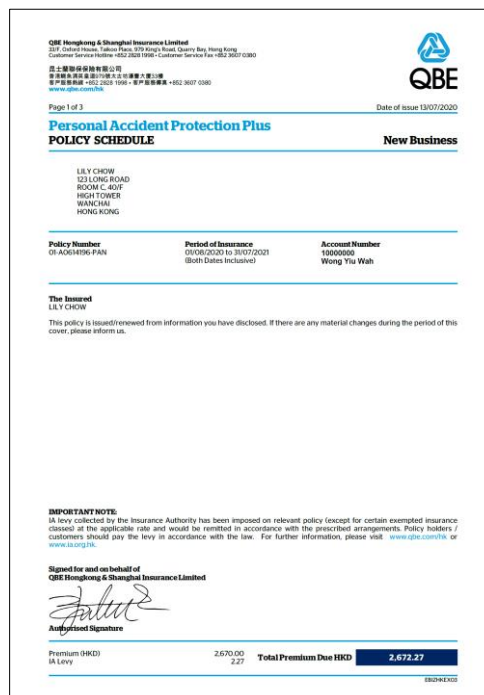
40. “Document Type”

document link to view the document

文件連結去檢閱文件

41.  to send the “Policy Document” to the customer

將 “Policy Document” 發送給客戶



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## Correspondence

A0614196PAN

**From:** Wong Yiu Wah **Date:** 13/7/2020 **New Business Issue**

**To\***

**Cc**

**Bcc**


**Subject** Qnect - QBE Personal Accident Plus Policy A06141

**Text**  
Dear LILY CHOW,  
Thank you for insuring with QBE. We advise that you read through the Policy Wording.

- Attachments** **Policy Documents**
- Schedule - Client Copy
  - Schedule - Intermediary Copy
  - Policy Wording
  - Debit Credit Note - Client Copy
  - Debit Credit Note - Intermediary Copy
  - Summary of Benefits
  - Receipt

**Message Sent**

Your e-mail has been sent.

42. **“To”** – System will default it to be the customer email address  
(can add other email addresses, using semicolon ( ; ) to separate them)  
**“To”** – 系統會預設它為客戶之電郵地址 (可以加入其他電郵地址 ; 並以 ( ; ) 相隔)
43. **“Subject”** – System will default the **“Subject”** to be the customer name but you may enter your own subject  
**“Subject”** – 系統會預設 **“Subject”** 為客戶名稱，但您可以輸入自定之郵件標題
44. **“Text”** – System will default the email content but you may enter your own email content  
**“Text”** – 系統會預設郵件內容，但您可以輸入自定之郵件內容
45. **“Attachments”** – System will default **“Policy Documents”** to be sent and you may uncheck the box besides the document’s name if you do not want to send it  
**“Attachments”** – 系統已預設附上 **“Policy Documents”**，但如該文件是不需要，可以剔除對應之文件方格
46.  
47. A pop-up message will show that the email has been sent and then    
頁面會有顯示電子郵件已發送，然後  
48. The customer will receive the **“Policy Documents”** email with the attachments  
客戶收到 **“Policy Documents”** 電郵及附件

## Qnect - QBE Personal Accident Plus Policy A0614196 - Policy Document

QnectAsia@qbe.com

To lilychow98729872@email.com



Dear LILY CHOW,

48

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 (Wong Yiu Wah).

Please find your policy documents attached.

Made possible  


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## “Make Payment” by “Issue Policy”

Customer Payment  
Pay Now  
Issue Policy **49**

Total Premium 2,6

SAVE PENDING ISSUE QUOTE MAKE PAYMENT

### 49. Customer selects “Issue Policy”

客戶選擇 “Issue Policy”

**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.

**YES** **50**

Nationality

Home Telephone Number

Business Telephone Number

Mobile Number

Fax Number

50.

## Policy

### Insurance Details

<b>Policy No:</b> A0614196	<b>Policy Status:</b> In Force
<b>Policy Type:</b> Personal Accident Insurance (PAN)	<b>Policy of Insurance:</b> 01/08/2020 to 31/07/2021
<b>Insured:</b> LILY CHOW	<b>Wording:</b> UWD.PANPLU.V1.1911
<b>Address:</b> ROOM C, 40/F HIGH TOWER 123 LONG ROAD WANCHAI	<b>SP Attn Code:</b> 00
<b>Agent:</b> Wong Yiu Wah	<b>Branch:</b> 01

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

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Transaction Type (expand / collapse)	Effective Date	Email	Document Type
<input checked="" type="radio"/> New Business Issue	01/08/2020	<input checked="" type="checkbox"/>	<a href="#">Schedule - Client Copy</a> <a href="#">Schedule - Intermediary Copy</a> <a href="#">Policy Wording</a> <a href="#">Debit Credit Note - Client Copy</a> <a href="#">Debit Credit Note - Intermediary Copy</a> <a href="#">Summary of Benefits</a>

52

53

51.  to enter the documents folder

進入文件夾頁面

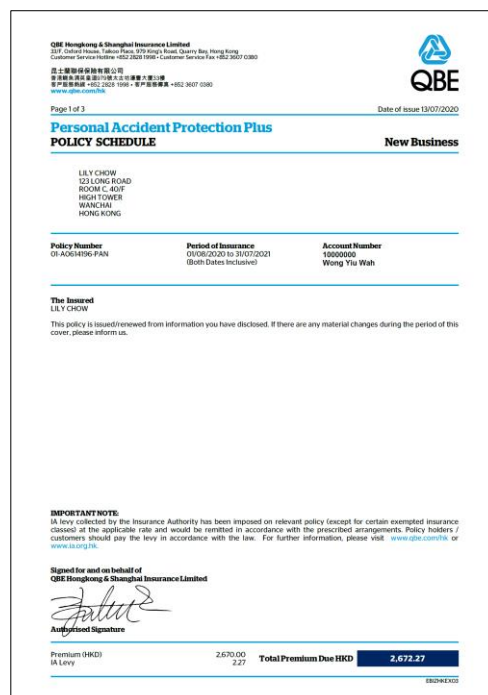
52. “Document Type”

document link to view the document

文件連結去檢閱文件

53.  to send the “Policy Documents” to the customer

將 “Policy Documents” 發送給客戶



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Home / Correspondence

## Correspondence A0614196PAN

**From:** Wong Yiu Wah      **Date:** 13/7/2020      **New Business Issue**

**To\***  54

**Cc**

**Bcc**

**Subject**  55




**Text**  56

- Attachments** **Policy Documents**
- Schedule - Client Copy
  - Schedule - Intermediary Copy
  - Policy Wording
  - Debit Credit Note - Client Copy
  - Debit Credit Note - Intermediary Copy
  - Summary of Benefits

**Message Sent** ✕

Your e-mail has been sent.

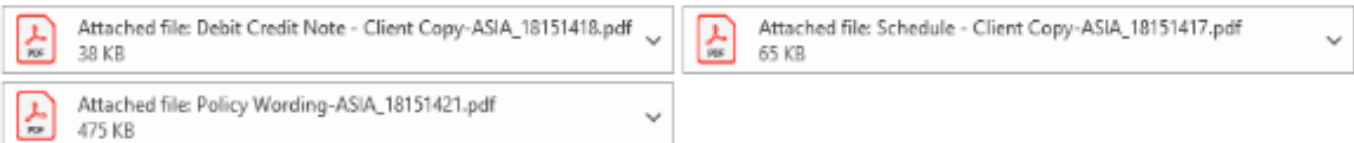
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54. **“To”** – System will default it to be the customer email address  
(can add other email addresses, using semicolon ( ; ) to separate them)  
**“To”** – 系統會預設它為客戶之電郵地址 (可以加入其他電郵地址 ; 並以 ( ; ) 相隔)
55. **“Subject”** – System will default the **“Subject”** to be the customer name but you may enter your own subject  
**“Subject”** – 系統會預設 **“Subject”** 為客戶名稱，但您可以輸入自定之郵件標題
56. **“Text”** – System will default the email content but you may enter your own email content  
**“Text”** – 系統會預設郵件內容，但您可以輸入自定之郵件內容
57. **“Attachments”** – System will default **“Policy Documents”** to be sent and you may uncheck the box besides the document’s name if you do not want to send it  
**“Attachments”** – 系統已預設附上 **“Policy Documents”**，但如該文件是不需要，可以剔除對應之文件方格
58.  
59. A pop-up message will show that the email has been sent and then    
頁面會有顯示電子郵件已發送，然後  
60. The customer received the **“Policy Documents”** email with the attachments  
客戶收到 **“Policy Documents”** 電郵及附件

## Qnect - QBE Personal Accident Plus Policy A0614196 - Policy Document

QnectAsia@qbe.com

To lilychow98729872@email.com



Dear LILY CHOW,

60

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 (Wong Yiu Wah).

Please find your policy documents attached.



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## Part D

### Endorsement

### 更改保單

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Find

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- Create a Marine Declaration
- Find a Quote
- Find a Policy / Cover Note
- Endorse a Policy
- Find Renewal Policies

Customise your dashboard here  CUSTOMISE

**Notifications**

Visible  Hidden

**Announcements**

Service Arrangements for Novel Coronavirus  
[Read more](#)

**Recovered Transactions**

- Business Insurance Solution
- Full Binding Quote  
17/04/2020 09:22 PM
- Business Insurance Solution

**Renewal Notifications**

1 Use "Policy Administration" – "Endorse a Policy"  
利用 "Policy Administration" 中之 "Endorse a Policy" 功能

2 "Search By" – "Policy Number / Cover Note"  
從 "Search By" 中，選擇 "Policy Number / Cover Note"  
▪ Input A0614196  
輸入 A0614196

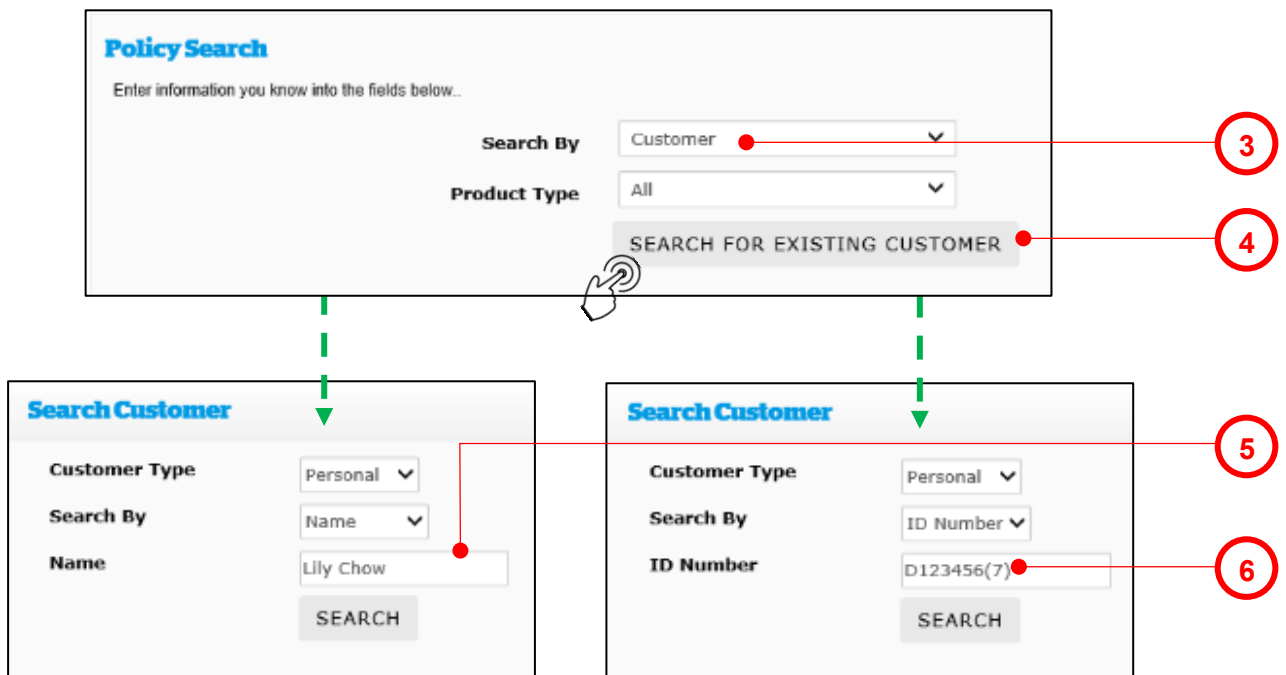
3 "Search By" – "Customer"  
從 "Search By" 中，選擇 "Customer"

SEARCH FOR EXISTING CUSTOMER

Personal

5 Select "Search By" – "Name"  
從 "Search By" 中選擇 "Name"

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



## Policy

**Policy Search**  
Enter information you know into the fields below..

Effective Date\*: 13/07/2020

Search By: Policy Number / Cover Note

Policy Number\*: A0614196 (2)

SEARCH

**Search Results**

Policy / Cover Note #	Name of insured	Policy type	Status	Expires	Links
<a href="#">A0614196</a>	LILY CHOW	Personal Accident Insurance (PAN)	In Force	31/07/2021	

(7) points to the link [A0614196](#)

7. Policy Number **A0614196** and go to the policy details  
 Policy Number **A0614196** 去進入保單內容

## Policy

### Insurance Details

<b>Policy No:</b> A0614196	<b>Policy Status:</b> In Force
<b>Policy Type:</b> Personal Accident Insurance (PAN)	<b>Policy of Insurance:</b> 01/08/2020 to 31/07/2021
<b>Insured:</b> LILY CHOW	<b>Wording:</b> UWD.PANPLU.V1.1911
<b>Address:</b> ROOM C, 40/F HIGH TOWER 123 LONG ROAD WANCHAI	<b>SP Attn Code:</b> 00
<b>Agent:</b> Wong Yiu Wah	<b>Branch:</b> 01

8

10

9

[Risks](#)

[Transaction History](#)

[Documents](#)

Section	Risk	Location / Type of Business	Commence	Terminate
No risks are active based on the effective date of inquiry. Click <a href="#">here</a> to inquire based on Inception Date of the policy.				

- Endorsement
- Cancellation
- View Policy
- POLICY OPTIONS**



8. “Insurance Details” main page

“Insurance Details” 頁面

9. **POLICY OPTIONS**

10. Select “Endorsement”

選擇 “Endorsement”

Change address

Rm C, 30F, High Tower, 123 Long Road, Wanchai, Hong Kong



11. System will default endorsement “**Effective Date**” as policy effective date but it can be changed according to the customer’s needs.

系統已預設修改保單之 “**Effective Date**” 為保單生效日期，但可以根據客戶之實質需要去改變

12. Select “**Reason**” (e.g. “**Error correction**”)

選擇 “**Reason**” (例如 “**Error correction**”)

13. **SUBMIT**

**Personal Accident**

**Insured Person 1** REMOVE

Surname / Given name\* Chow Lily

Adult / Child\* Adult

Date of Birth (DD/MM/YYYY)\* 31/10/1977

HK ID Number D1234567

Plan\* Plan D

Occupation\* Accountant

Class Class 1

Optional Cover(s)

- Hospital Cash (daily)
- Temporary Total Disablement (per week)

ADD INSURED PERSON +

Premium Breakdown:	Annual Premium	Premium Due	Levy	Total Due
Total	\$2,670.00	\$0.00	\$0.00	\$0.00

CALCULATE PREMIUM >

Total Premium **0.00** HKD

14. **NEXT >**

**NEXT >** **14**

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## Personal Accident Insurance

### Customer Details

Customer Type*	Personal
Name*	LILY CHOW
ID Number*	D123456(7)
Gender	Female
Date of Birth*	31/10/1977
Nationality	HONG KONG
Home Telephone Number	
Business Telephone Number	
Mobile Number	
Fax Number	
Email Address	trainingHKSI@qbe.com
Floor / Unit No.	ROOM C, 30/F
Building Number and Name	HIGH TOWER
Street Number and Name*	123 LONG ROAD
District	WANCHAI
Country*	HONG KONG

Total Premium **0.00** HKD

ISSUE ENDORSEMENT

Endorsement has been successfully issued.

OK

15. Change the address

更改地址

16. ISSUE ENDORSEMENT

17. OK

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Find

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Home / Policy Header

Policy and risk details based on effective date of 01/08/2020

## Policy

### Insurance Details

<b>Policy No:</b> A0614196	<b>Policy Status:</b> In Force
<b>Policy Type:</b> Personal Accident Insurance (PAN)	<b>Policy of Insurance:</b> 01/08/2020 to 31/07/2021
<b>Insured:</b> LILY CHOW	<b>Wording:</b> UWD.PANPLU.V1.1911
<b>Address:</b> ROOM C, 30/F HIGH TOWER 123 LONG ROAD WANCHAI	<b>SP Attn Code:</b> 00
<b>Agent:</b> Wong Yiu Wah	<b>Branch:</b> 01

[Risks](#) | [Transaction History](#) | [Document](#)

Transaction Type (expand/collapse)	Effective Date	Email	Document Type
Endorsement Issue	01/08/2020	<input checked="" type="checkbox"/>	<a href="#">Schedule - Client Copy</a> <a href="#">Schedule - Intermediary Copy</a>

18.  to enter the documents folder  
 進入文件夾頁面

19. **“Document Type”**  
 document link to view the document  
 文件連結去檢閱文件

20.  to send the **“Endorsement”** to the customer  
 將 **“Endorsement”** 發送給客戶



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Find

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**Correspondence** A0614196PAN

From: Wong Yiu Wah      Date: 13/7/2020      Endorsement Issue

To\*  21

Cc

Bcc

Subject  22

Text  23

Attachments **Policy Documents** 24

Schedule - Client Copy

Schedule - Intermediary Copy

**Message Sent** X

Your e-mail has been sent.

26

25

21. **“To”** – System will default it to be the customer email address  
(can add other email addresses, using semicolon ( ; ) to separate them)  
“To” – 系統會預設它為客戶之電郵地址 (可以加入其他電郵地址 ; 並以 ( ; ) 相隔)
22. **“Subject”** – System will default the **“Subject”** to be the **“Policy Number”** but you may enter your own subject  
“Subject” – 系統會預設 **“Subject”** 為 **“Policy Number”** , 但您可以輸入自定之郵件標題
23. **“Text”** – System will default the email content but you may enter your own email content  
“Text” – 系統會預設郵件內容 , 但您可以輸入自定之郵件內容
24. **“Attachments”** – System will default **“Policy Documents”** to be sent and you may uncheck the box besides the document’s name if you do not want to send it  
“Attachments” – 系統已預設附上 **“Policy Documents”** , 但如該文件是不需要 , 可以剔除對應之文件方格
25.
26. A pop-up message will show that the email has been sent and then   
頁面會有顯示電子郵件已發送 , 然後

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## Qnect - QBE Personal Accident Plus Policy A0614196 - Policy Document

QnectAsia@qbe.com

To lilychow98729872@email.com

27



Attached file: Schedule - Client Copy-ASIA\_18151742.pdf  
63 KB

Dear LILY CHOW,

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 (Wong Yiu Wah).

Please find your policy documents attached.

Made possible



27. The customer received the “**Policy Documents**” email with the attachments

客戶收到 “**Policy Documents**” 電郵及附件

~ End ~

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