

--- Home Insurance ---

Version: August 2020



CONTENTS 目錄

A: Login	登入		
B: Create Quote	建立報價	5	
C: Issue Policy	簽發保單	17	
D: Endorsement	更改保單	42	

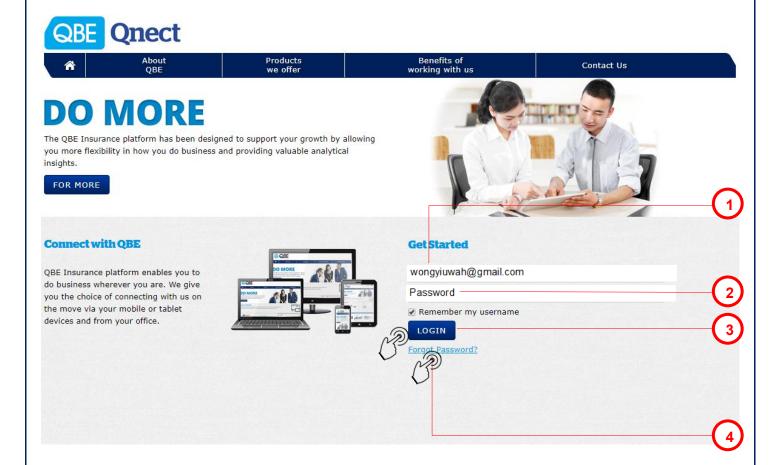


Part A

Login

登入





1. Login with Email Address

利用電郵地址登入

2. Key in Password

輸入密碼

- 3. Cogin
- 4. If you forget your password, please (Forgot Password"

假如您忘記密碼·請 "Forgot Password"



Part B

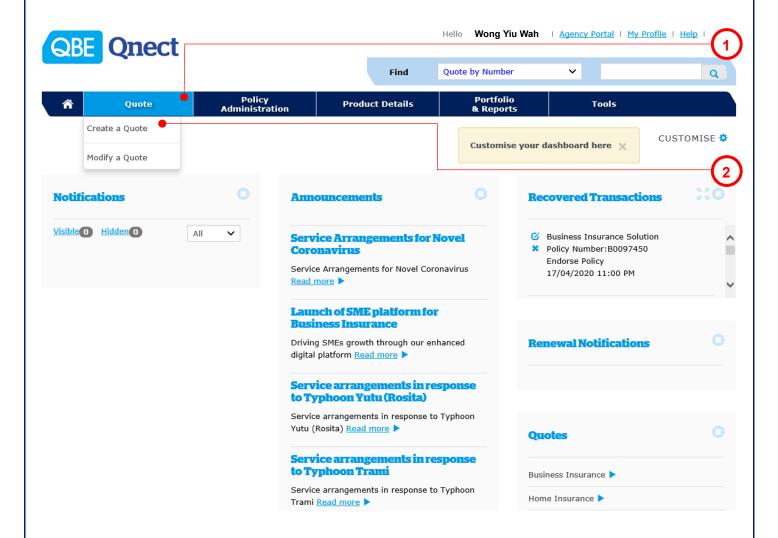
Create Quote

建立報價



- Mr. Yu Wai Lap (D546213(0))
- Period of Insurance: 1 August 2020 to 31 July 2021
- Plan Type: Premier
- Gross Floor Area: 850 sq ft
- Building Type: Multi Storey
- Occupancy Type: Owner Occupied
- Optional Cover:
 - Domestic Employer's Liability (one helper)
 - Grace Mary (Passport: 963258741) (Philippines)
 - > DOB: 5 May 1970
 - Unspecified Valuables (Plan A)
 - Specified Valuables Total Sum Insured: HK\$50,000
 - Watch (Rolex) HK\$50,000
- Building Sum Insured: HK\$2,000,000
- Liability to Others: HK\$10,000,000
- Address: Flat C, 28/F, Garden Mansion, 148-150 Tai Hang Road,
 Tai Hang, Hong Kong
- Email Address: yuwailap@email.com





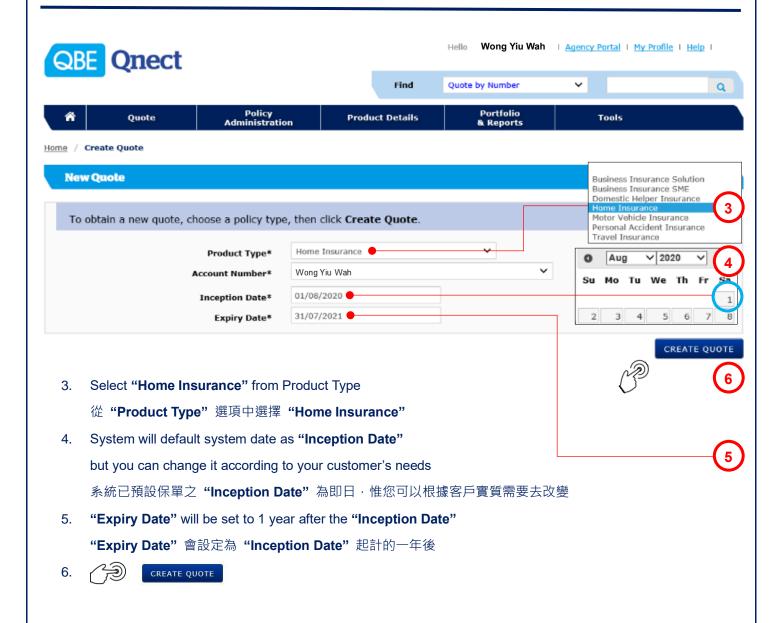
1. Choose "Quote" from the main menu

從主頁面選單中,選擇 "Quote"

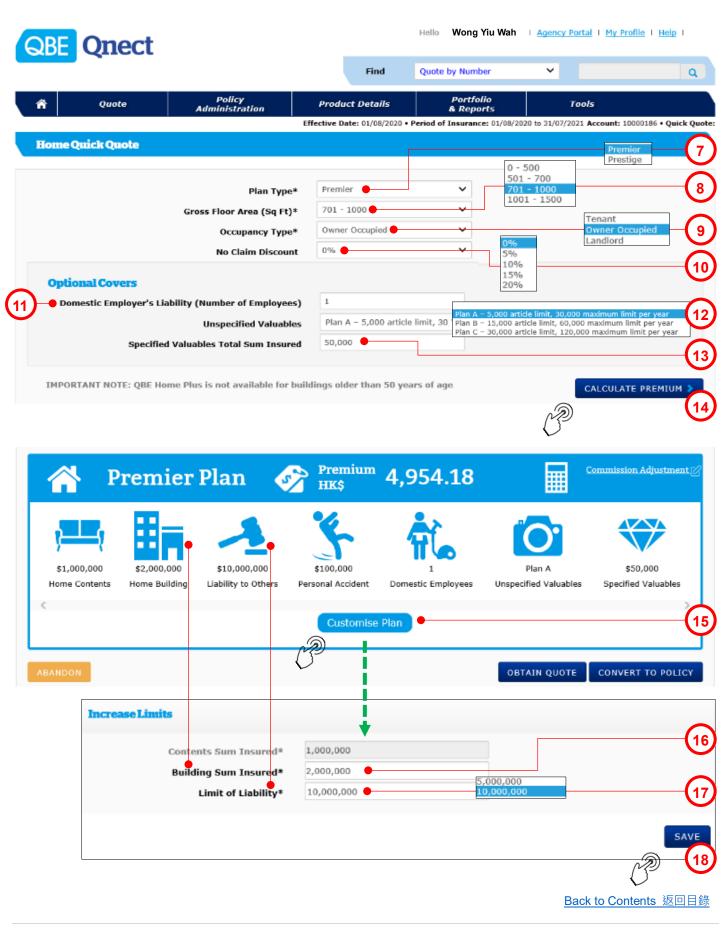
2. Select "Create a Quote"

選擇 "Create a Quote"





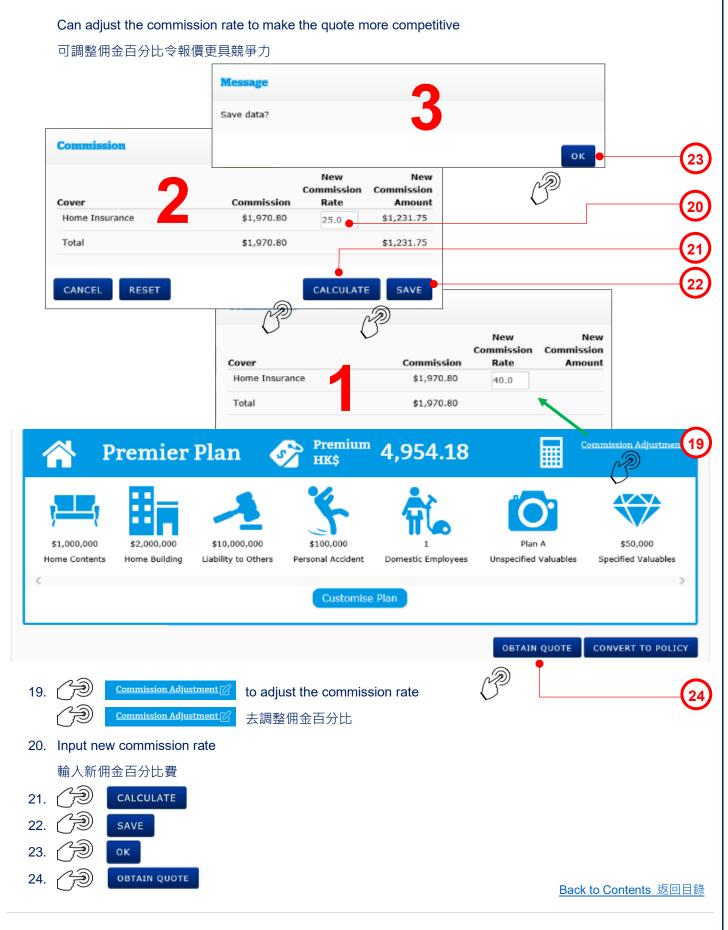




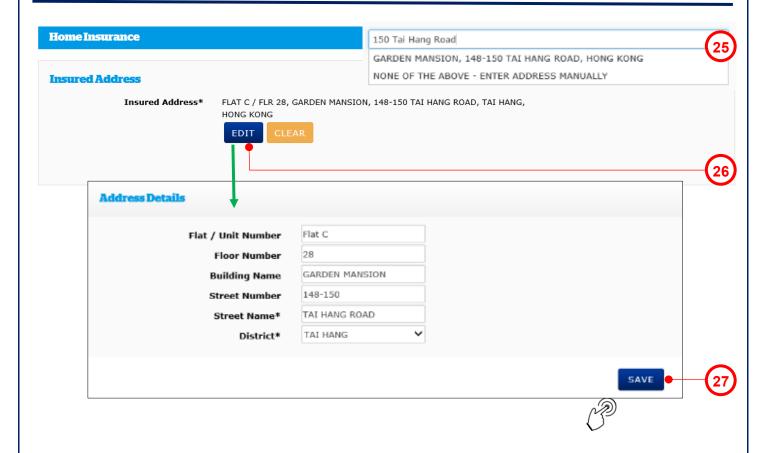


- 7. Select "Plan Type"
 - 選擇 "Plan Type"
- 8. Select "Gross Floor Area (Sq Ft)"
 - 選擇 "Gross Floor Area (Sq Ft)"
- 9. Select "Occupancy Type"
 - 選擇 "Occupancy Type"
- 10. Select "No Claim Discount"
 - 選擇 "No Claim Discount"
- 11. Enter "Number of Employees"
 - 輸入 "Number of Employees"
- 12. Select "Unspecified Valuables"
 - 選擇 "Unspecified Valuables"
- 13. Enter "Specified Valuables Total Sum Insured"
 - 輸入 "Specified Valuables Total Sum Insured"
- 14. CALCULATE PREMIUM >
- 15. Customise Plan to increase limits
 - Customise Plan 去增加保障額
- 16. Increase "Building Sum Insured"
 - 增加 "Building Sum Insured"
- 17. Increase "Limit of Liability"
 - 增加 "Limit of Liability"
- 18.
- SAVE









25. Enter the Building Name OR Street Name in the "Insured Address"

If you cannot find the address in the "Insured Address, please scroll to the bottom and select "NONE OF

THE ABOVE - ENTER ADDRESS MANUALLY"

於 "Insured Address" 輸入受保地址之街道或大廈名稱

如您未能於"Insured Address"找到受保地址,請從選項中捲動到最底及選擇

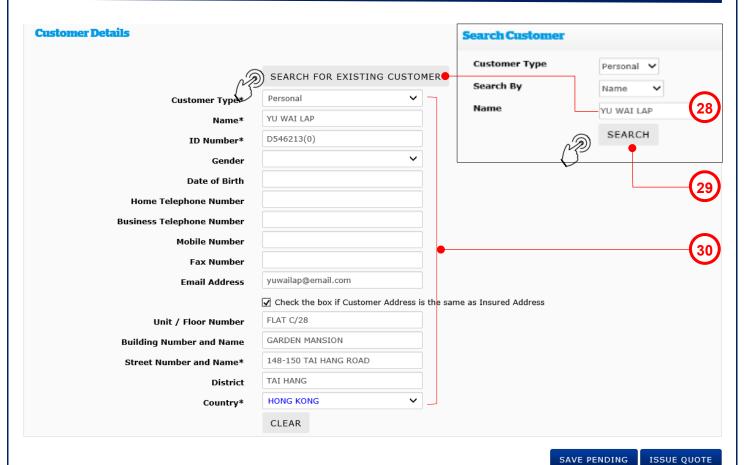
"NONE OF THE ABOVE - ENTER ADDRESS MANUALLY" 去自行輸入完整地址

26. After you have found the insured address, (FDIT) to complete the full address

當您尋找到受保地址後, FDIT 去輸入完整地址

27. 🥱 5ave

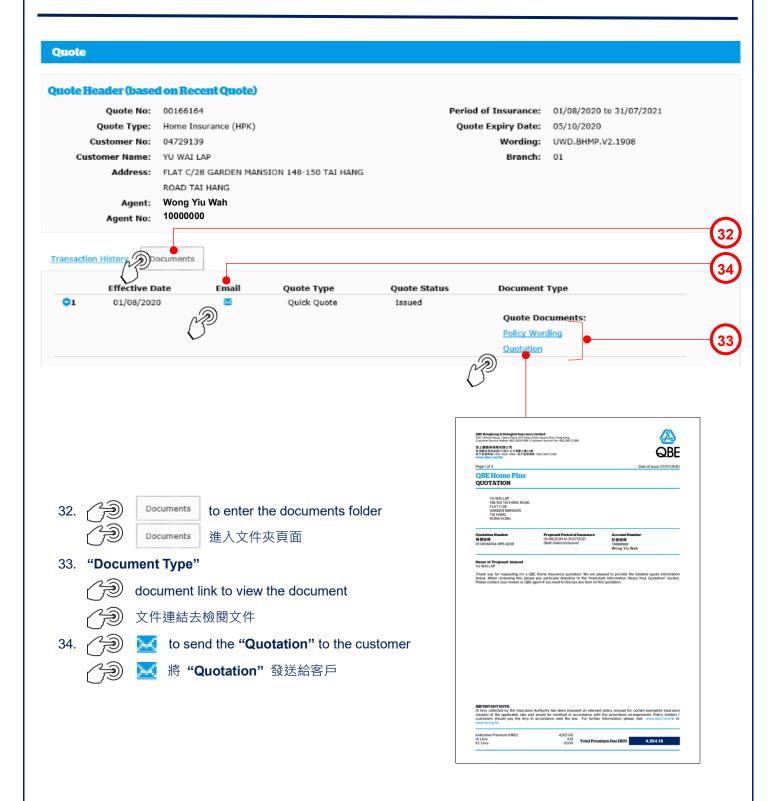




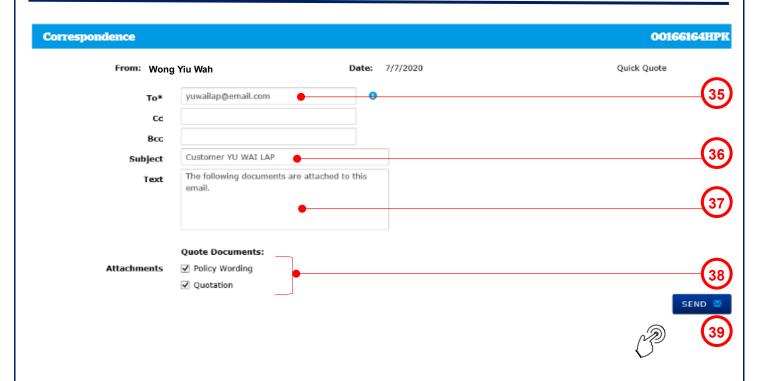


- 28. If Mr. Yu is an existing customer, search for existing customer to retrieve his details 如果余先生已是現有客戶,可以揀選 search for existing customer 取得他的資料
- 29. SEARCH
- 30. If Mr. Yu is a new customer, enter his information in the fields provided (* is compulsory) 如果余先生是新客戶·按表單內容輸入他的資料 (* 必須填寫)
- 31. SSUE QUOTE









- 35. "**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)
- 36. **"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
- 37. **"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
- 38. **"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

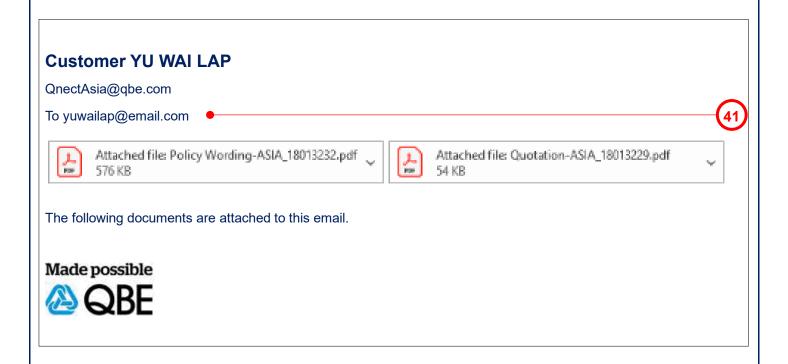


SEND 🚾





40. A pop-up message will show that the email has been sent and then 页面會有顯示電子郵件已發送,然後 〇〇 〇K



41. The customer received the "Policy Documents" email with the attachments 客戶收到 "Policy Documents" 電郵及附件

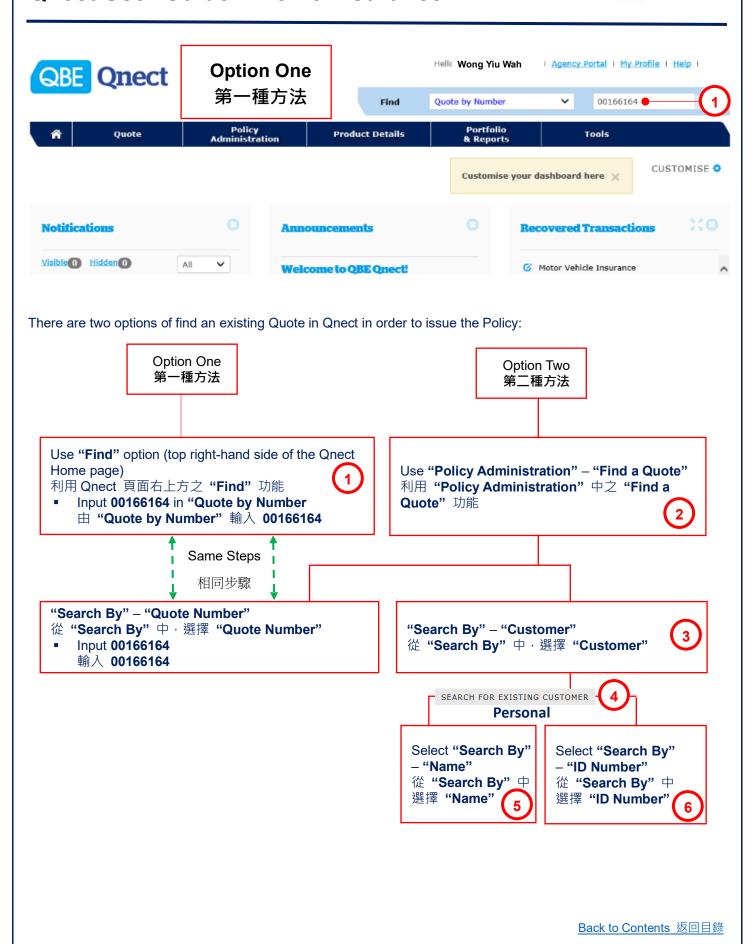


Part C

Issue Policy

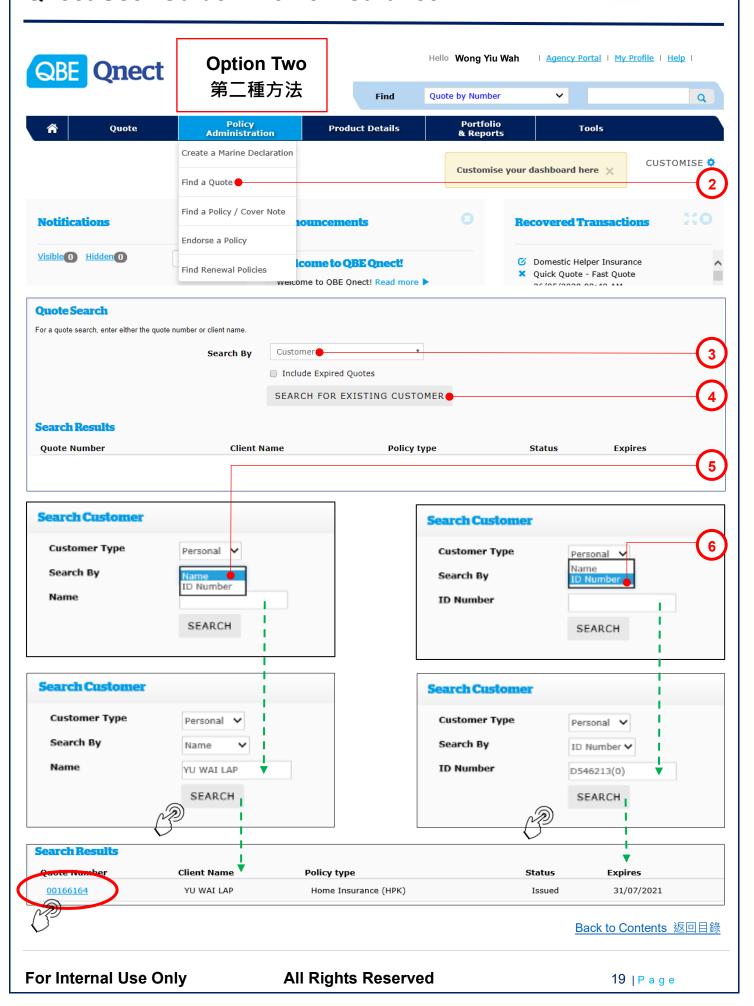
簽發保單



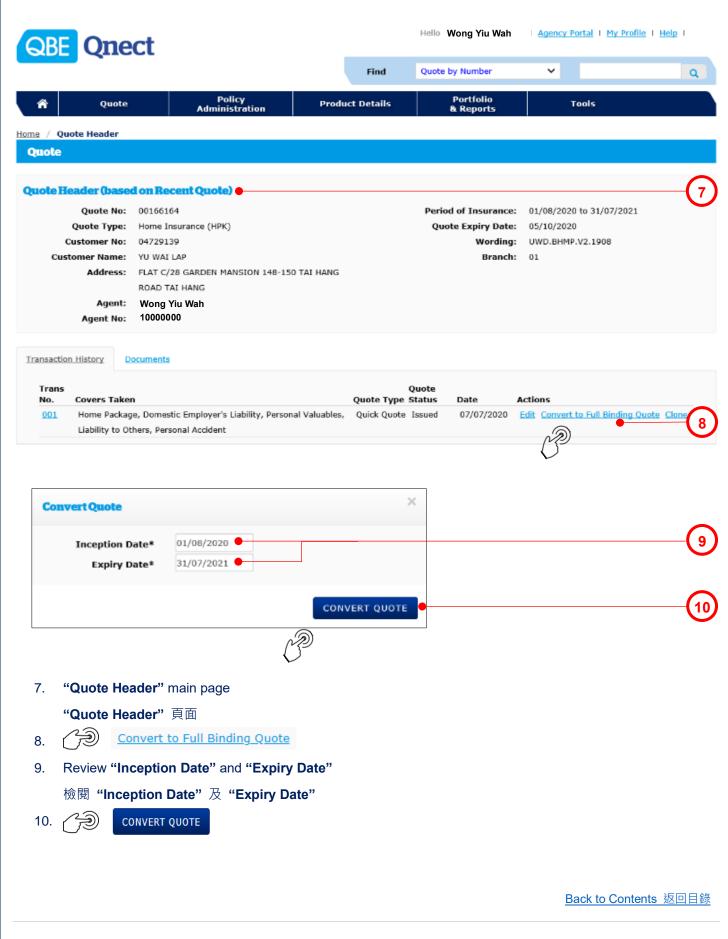


For Internal Use Only

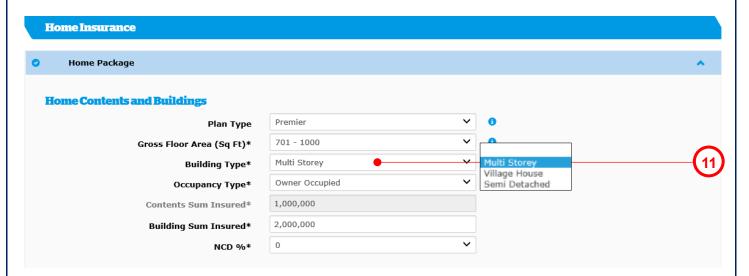






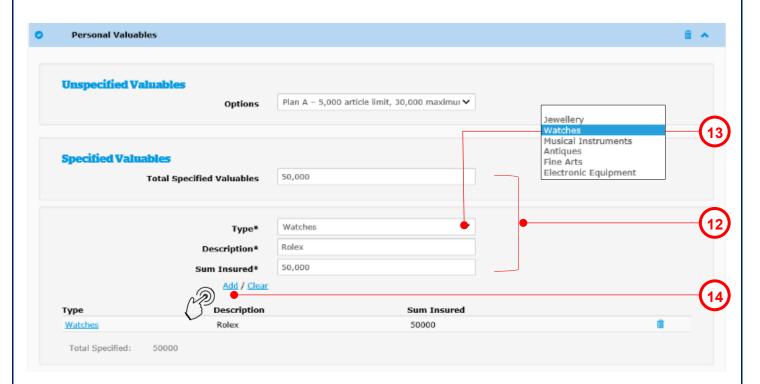






11. Select "Building Type"

選擇 "Building Type"



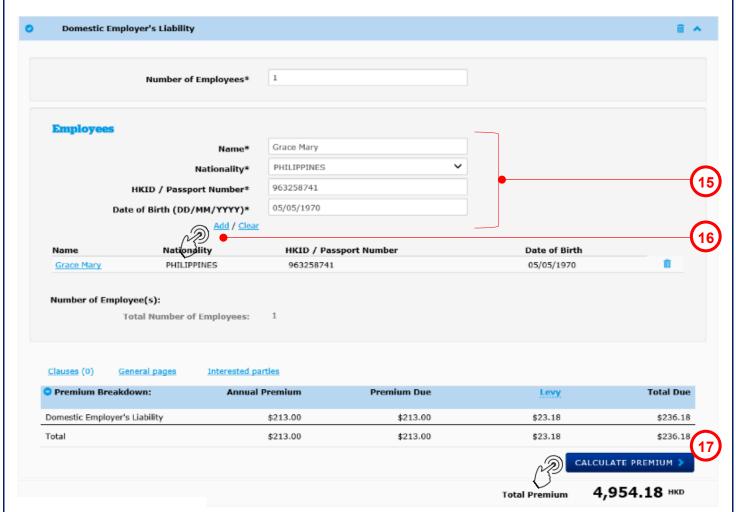
- 12. Enter "Specified Valuables" details, including the "Type", "Description" and "Sum Insured"
 - 輸入 "Specified Valuables" 內容,包括 "Type"、"Description" 及 "Sum Insured"
- 13. Select "Type"

選擇 "Type"

14. (2) Add to add the item



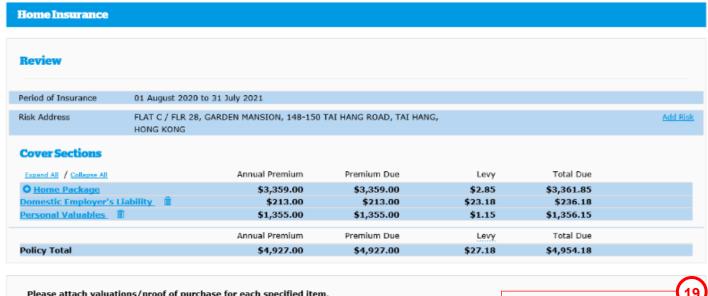


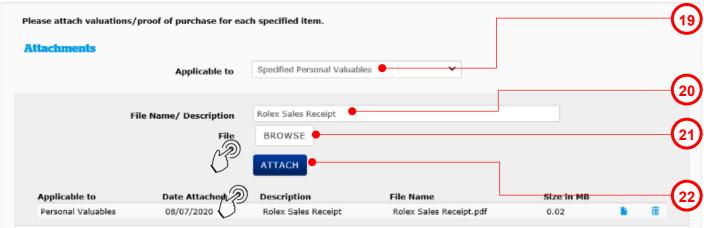




- 15. Input Domestic Employee's Name, Nationality, HKID / Passport Number and Date of Birth
 - 輸入 Domestic Employee 之 Name、Nationality、HKID / Passport Number 及 Date of Birth
- 16. to to update Domestic Employee's details
- 会别 基加入 Domestic Employee 之內容
- 17. CALCULATE PREMIUM >
- 18. 🥱 NEXT 🔪





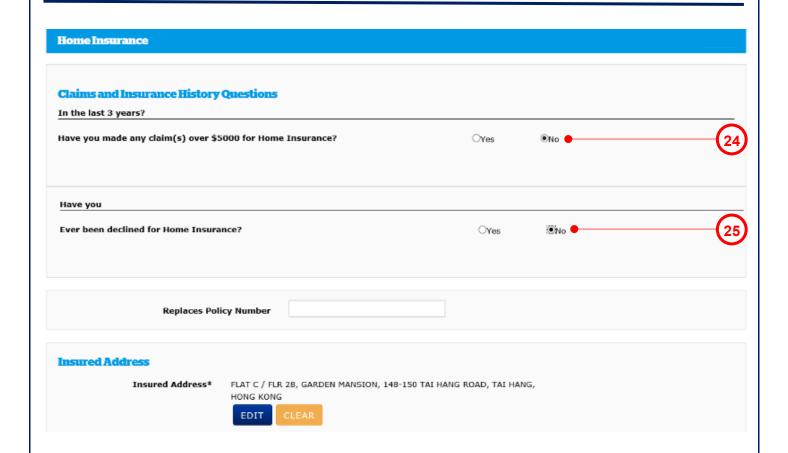




- 19. Select "Specified Personal Valuables" in "Applicable to"
 - 於 "Applicable to" 選擇 "Specified Personal Valuables"
- 20. Input the "File Name / Description"
 - 輸入 "File Name / Description"
- 21. BROWSE to find the document
 - BROWSE 去尋找文件
- 22. ATTACH to attach the document
 - **ATTACH** 去上載文件

23. NEXT >





Claims and Insurance History Questions

24. Have you had any claim(s) over \$5000 for Home Insurance in the last 3 years?

過去3年您是否有家居保險索賠(超過\$5000)記錄?

If you had Claims Record (over \$5000) 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(超過\$5000)記錄,請輸入相關資料及保單會被轉介至核保同事跟進。

25. Have you ever been declined for Home Insurance?

過去您是否有被拒絕投保家居保險紀錄?

If you had been declined insurance before, please fill in the details and the policy will be referred to the underwriter.

如您有曾被拒絕投保紀錄,請您輸入相關資料及保單會被轉介至核保同事跟進。



Customer Details				
	SEARCH FOR EXISTING CUS	STOMER		
Customer Type*	Personal	~		
Name*	YU WAI LAP			
ID Number*	D546213(0)			
Title		~		
Gender		~		
Date of Birth				
Nationality	HONG KONG	~		
Home Telephone Number				
Business Telephone Number				
Mobile Number				20
Fax Number				
Email Address	yuwailap@email.com			
	Check the box if Customer Addre	ess is the same as In	sured Address	
Unit / Floor Number	FLAT C/28			
Building Number and Name	GARDEN MANSION			
Street Number and Name*	148-150 TAI HANG ROAD			
District	TAI HANG			
Country*	HONG KONG	~		Customer Payment
	CLEAR			Pay Now
				Issue Policy
	SAVE PENDING	ISSUE QUOTE	REFER TO UNDERWRITER	MAKE PAYMENT .

26. Review the "Customer Details"

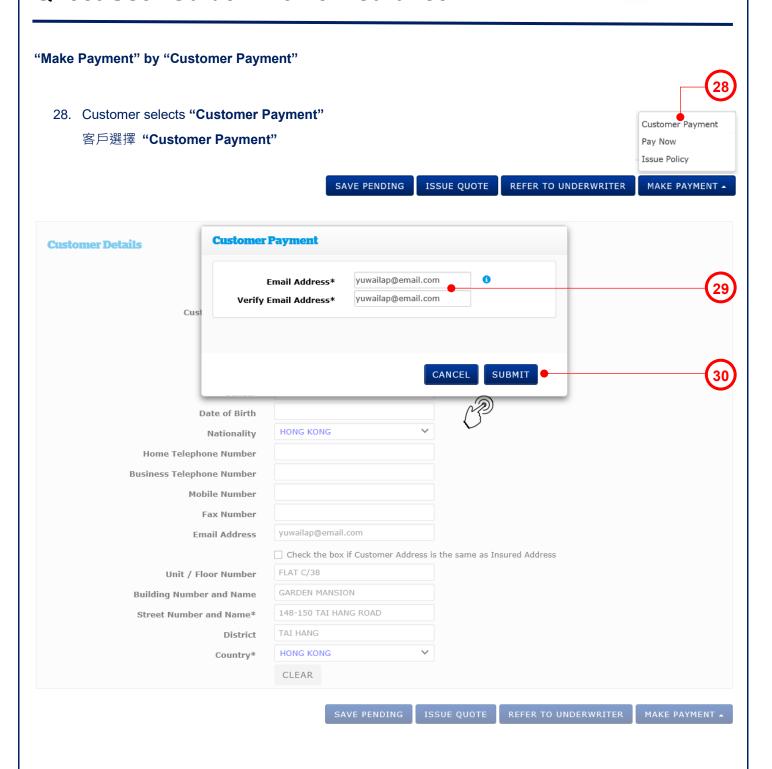
檢視 "Customer Details"

27. A MAKE PAYMENT A

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 28 to Step 43 如果您選擇 "Customer Payment",請參考步驟 28 至步驟 43
- If you select "Pay Now", please refer to Step 44 to Step 60 如果您選擇 "Pay Now" · 請參考步驟 44 至步驟 60
- If you select "Issue Policy", please refer to Step 61 to Step 72 如果您選擇 "Issue Policy" · 請參考步驟 61 至步驟 72





29. Verify customer's email address

核對客戶電郵地址

30. 🥱





Policy

Insurance Details

Policy No: H0236115

Policy Type: Home Insurance (HPK)

Insured: YU WAI LAP

Address: FLAT C/28 GARDEN MANSION 148-150 TAI HANG

ROAD TAI HANG Agent: Wong Yiu Wah Policy Status: Pending New Business

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

Wording: UWD.BHMP.V2.1908

SP Attn Code: 00

Branch: 01

31. The "Policy Status" will show "Pending New Business"

"Policy Status" 會顯示 "Pending New Business"

32. 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 - Home Insurance Payment request for H0236115

QnectAsia@qbe.com

To yuwailap@email.com

Dear YU WAI LAP.

Thank you for insuring with QBE.

Your QBE Home 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 >

Made possible







Home Insurance Payment - Policy Summary - H0236115

Policy Summary Important Notice . If the information contained herein is incorrect or incomplete or the insurance does not meet Your requirements. Please tell us as soon as possible. · You are reminded of the need to tell Us immediately of any facts which We would take into account in Our assessment of acceptance of this insurance. Failure to disclose all relevant facts may invalidate Your policy, or may result in the policy not operating fully. The Insured Person (s) has/ have read and consented to the <u>Personal information Collection Statement</u> I agree with the declarations and confirm the details contained in this page are true and correct. 04729139 Customer No **Full Name** YU WAI LAP Insurance Details Inception Date 01/08/2020 31/07/2021 Risk Location Address FLAT C, 28, GARDEN MANSION, 148-150 TAI HANG ROAD, TAI HANG Gross Floor Area (Sq Ft) 701 - 1000 ft² Occupancy Type Owner Occupied **Risk Details** Plan Premier **Home Contents** 1000000 Building 2000000 Liability to Others 10000000 Personal Accident 100000 Specified Personal Valuables 50000 **Domestic Employer's Liability** 1 helper(s) **Unspecified Personal** Plan A - 5,000 article limit, 30,000 maximum limit per year Valuables

QBE Home Plus - (Premier)

Premium HKD 4,954.18

MAKE PAYMENT

ABANDON

33. Customer reviews the "Importance Notice" under the "Policy Summary"

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

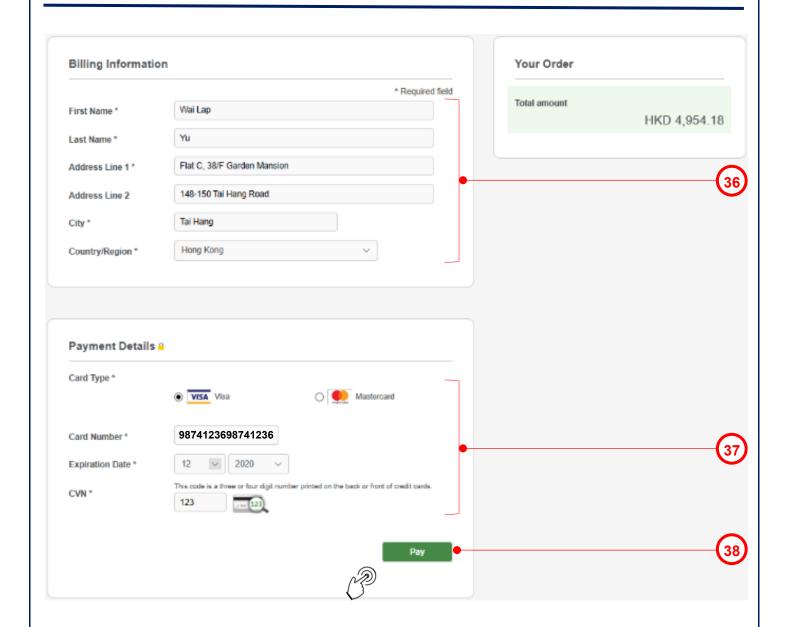
客戶檢閱 "Policy Summary" 內之 "Importance Notice"

34. Customer agrees to "Policy Summary" and checks the box

客戶同意 "Policy Summary" 並在方格內打勾







- 36. Customer inputs the "Billing Information"
 - 客戶輸入 "Billing Information"
- 37. Customer inputs the "Payment Details"
 - 客戶輸入 "Payment Details"
- 38.





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 H0236115-HPK YU WAI LAP Insured Period of Insurance From 1 Aug 2020 31 Jul 2021 5941731609266623303001 Receipt number

Amount HKD 4,954.18

39. Customer receives the "Payment Confirmation"

客戶收到 "Payment Confirmation"

40. (CLOSE)

41. At the same time, Customer receives the "Payment Receipt" email

與此同時,客戶收到 "Payment Receipt" 電郵





Qnect - QBE Home Plus Policy H0236115 Payment Receipt - YU WAI LAP

QnectAsia@qbe.com

To yuwailap@email.com

41

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: H0236115 - HPK

Insured: YU WAI LAP

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

Payment Amount: HKD 4,954.18

Receipt Number: 5941731609266623303001

Made possible





Qnect - QBE Home Plus H0236115 Policy Document QnectAsia@qbe.com To yuwailap@email.com Attached file: Receipt-ASIA_18072319.pdf 37 KB Attached file: Summary of Benefits-ASIA_18072330.pdf To yuwailap@email.com Attached file: Policy Wording-ASIA_18072329.pdf Attached file: Schedule - Client Copy-ASIA_18072322.pdf To yuwailap@email.com Attached file: Policy Wording-ASIA_18072329.pdf To yuwailap@email.com Attached file: Policy Wording-ASIA_18072329.pdf To yuwailap@email.com Attached file: Schedule - Client Copy-ASIA_18072322.pdf To yuwailap@email.com Attached file: Schedule - Client Copy-ASIA_18072322.pdf To yuwailap@email.com Attached file: Schedule - Client Copy-ASIA_18072322.pdf To yuwailap@email.com Attached file: Summary of Benefits-ASIA_18072330.pdf Attached file: Schedule - Client Copy-ASIA_18072322.pdf To yuwailap@email.com Attached file: Summary of Benefits-ASIA_18072330.pdf Attached file: Schedule - Client Copy-ASIA_18072322.pdf To yuwailap@email.com Attached file: Schedule - Client Copy-ASIA_18072322.pdf Attached file: Schedule - Client Copy-ASIA_18072322.pdf To yuwailap@email.com Attached file: Schedule - Client Copy-ASIA_18072322.pdf To yuwailap@email.com Attached file: Schedule - Client Copy-ASIA_18072322.pdf Attached file: Schedule - Client Copy-ASIA_18072322.pdf Attached file: Schedule - Client Copy-ASIA_18072322.pdf Attached file: Schedu

Made possible

intermediary - Wong Yiu Wah.

Please find your policy documents attached.



42. Customer receives the "Policy Document" email

客戶收到 "Policy Document" 電郵



Qnect - QBE Home Plus Policy H0236115 Payment Receipt- YU WAI LAP

QnectAsia@qbe.com

To Wong Yiu Wah



Dear Wong Yiu Wah,

Please note that the insured (YU WAI LAP) online credit card payment for Policy H0236115 with payment amount HKD 4,954.18 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.

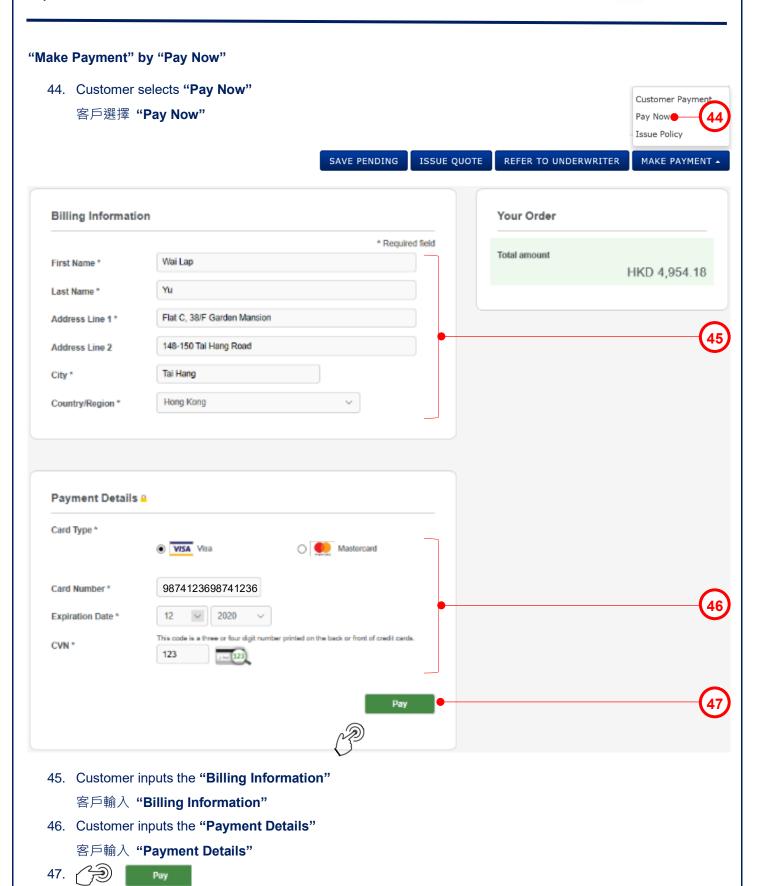
Made possible



43. Agent receives the "Payment Receipt" email

Agent 收到 "Payment Receipt" 電郵







Payment Confirmation

Payment Confirmation

Thank you. Your payment has been accepted. This is your confirmation for:

Policy Details

Policy Number H0236115-HPK Insured YU WAI LAP From 1 Aug 2020 To 31 Jul 2021 Period of Insurance

Receipt number 5941731609266623303001

HKD 4,954.18 Amount



48. Customer receives the "Payment Confirmation"

客戶收到 "Payment Confirmation"

CLOSE

50. At the same time, Agent receives the "Payment Receipt" email

與此同時, Agent 收到 "Payment Receipt" 電郵

Qnect - Home Insurance Policy H0236115 Payment Receipt - YU WAI LAP

QnectAsia@qbe.com

50

To Wong Yiu Wah

Thank you. Your payment has been accepted.

This is your confirmation for:

Policy Details

Policy Number: H0236115 - HPK

Insured: YU WAI LAP

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

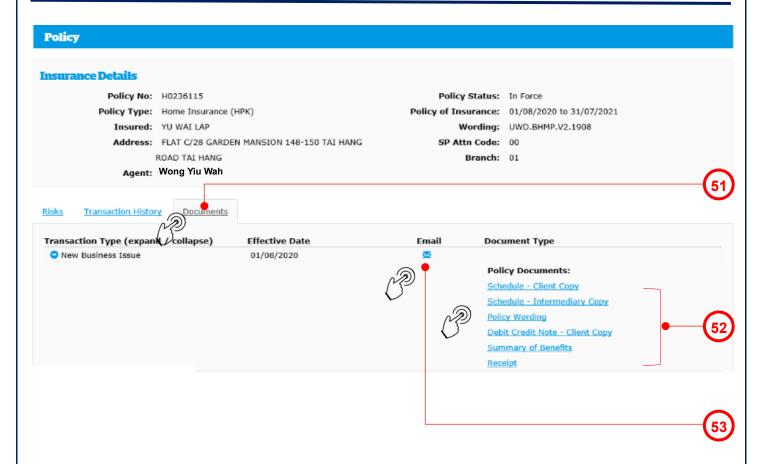
Payment Amount: HKD 4,954.18

Receipt Number: 5941731609266623303001

Made possible





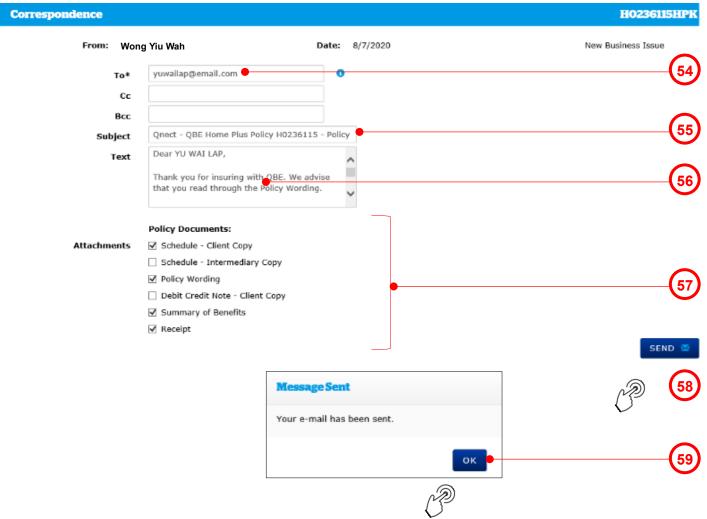




- 52. "Document Type"
 - document link to view the document
 - 文件連結去檢閱文件
- 53. Contact the "Policy Document" to the customer
 - 🥟 💌 將 "Policy Document" 發送給客戶







- 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,可以剔除對應之方格



Qnect - QBE Home Plus Policy H0236115 - Policy Document QnectAsia@qbe.com To yuwallap@email.com Attached file: Policy Wording-ASIA_18096040.pdf S76 kB Attached file: Summany of Benefits-ASIA_18096041.pdf Attached file: Schedule - Client Copy-ASIA_18096024.pdf T2 kB Dear YU WAI LAP, 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 Wade possible Wage Place of Policy H0236115 - Policy Document Attached file: Receipt-ASIA_18096019.pdf Attached file: Receipt-ASIA_18096019.pdf Attached file: Schedule - Client Copy-ASIA_18096024.pdf T2 kB Attached file: Receipt-ASIA_18096019.pdf T2 kB Attached file: Schedule - Client Copy-ASIA_18096024.pdf T2 kB

60. Customer receives the "Policy Document" email

客戶收到 "Policy Document" 電郵

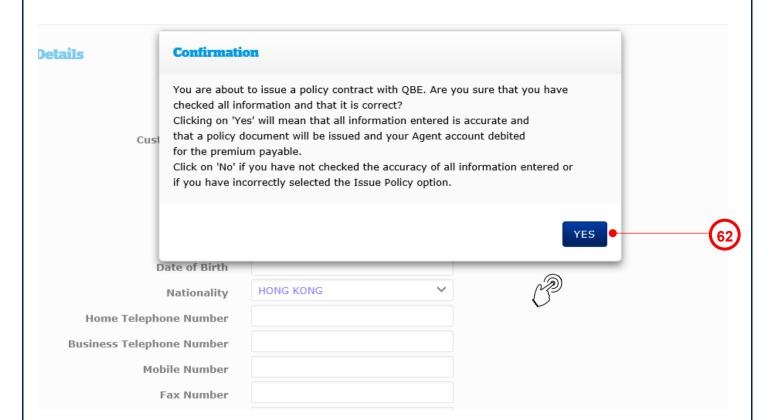


"Make Payment" by "Issue Policy"



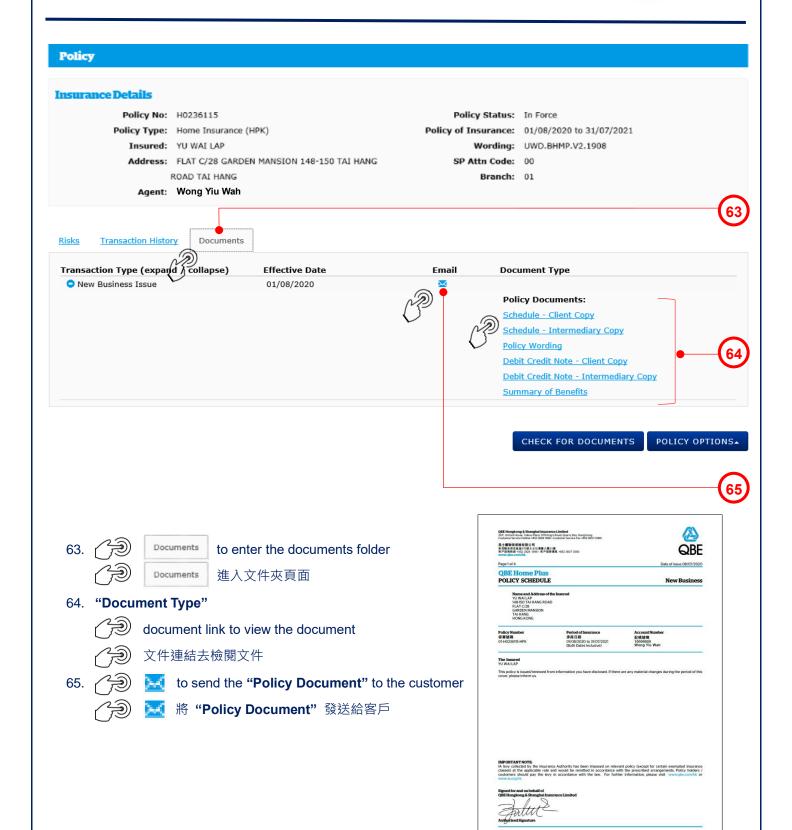
61. Customer selects "Issue Policy"

客戶選擇"Issue Policy"

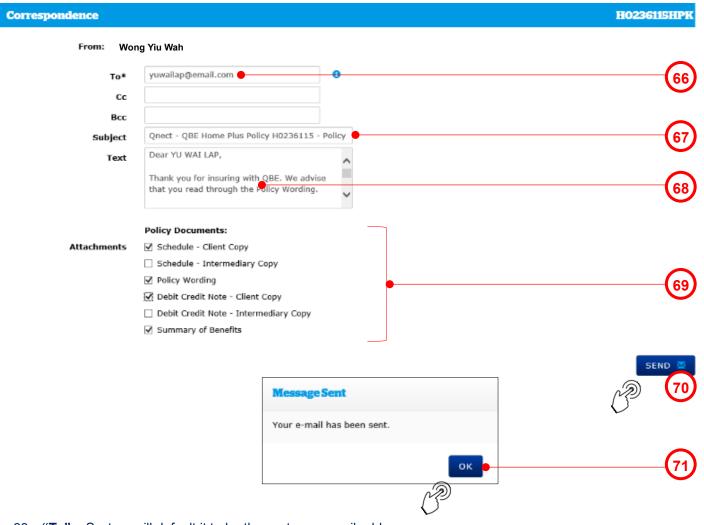


62. 🥱 🕟









- 66. **"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)
- 67. **"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
- 68. **"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
- 69. **"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
- 70. → SEND 🗷
- 71. A pop-up message will show that the email has been sent and then 页面會有顯示電子郵件已發送,然後 〇〇 OK



72

Qnect - Home Insurance Policy H0236115 - Policy Document

QnectAsia@qbe.com

To yuwailap@email.com



Dear YU WAI LAP,

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



72. Customer receives the "Policy Document" email

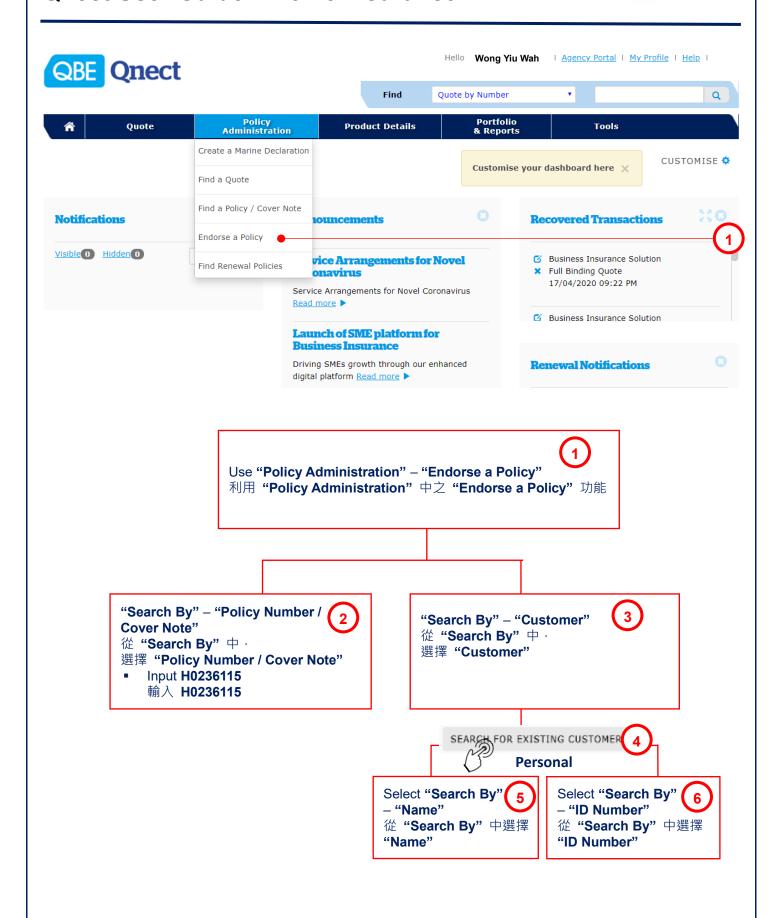
客戶收到 "Policy Document" 電郵



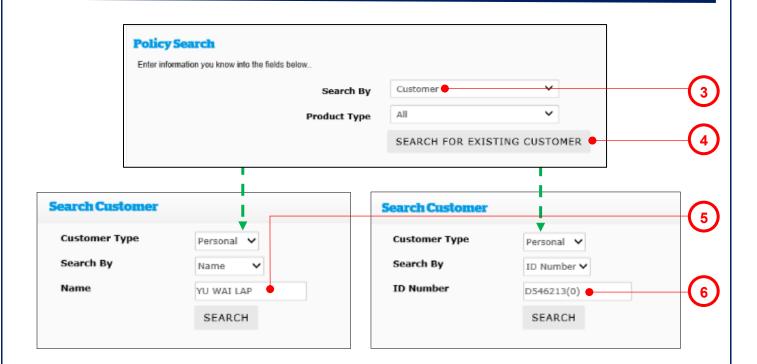
Part D

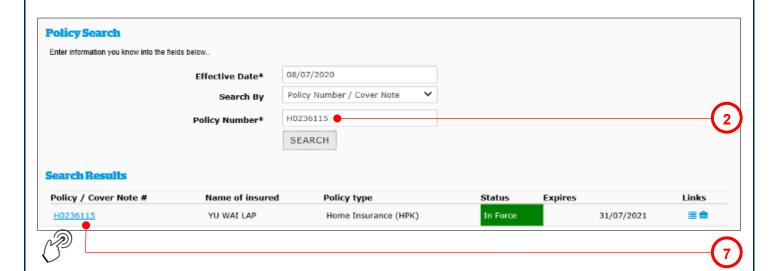
Endorsement 更改保單





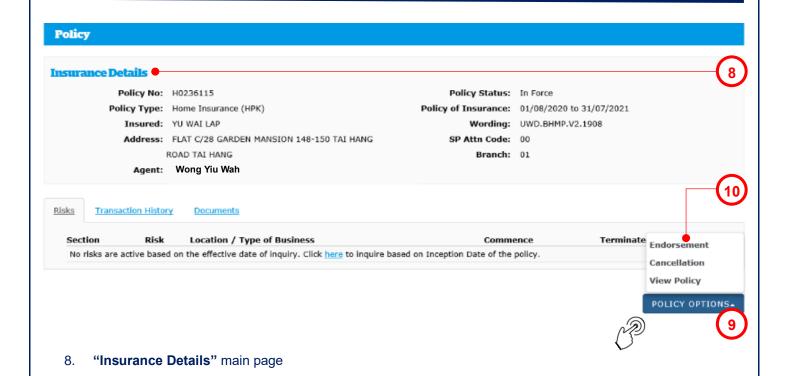






7. Policy Number **H0236115** and go to the policy details Policy Number **H0236115** 去進入保單內容





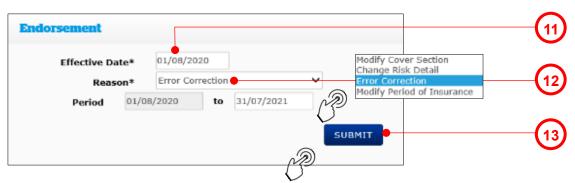
9. POLICY OPTIONS.

10. Select "Endorsement"

"Insurance Details" 頁面

- 選擇 "Endorsement"
 - Email Address: yuwailappeter@email.com
 - Address: Flat C, 38/F, Garden Mansion, 148-150 Tai Hang Road,
 Tai Hang, Hong Kong





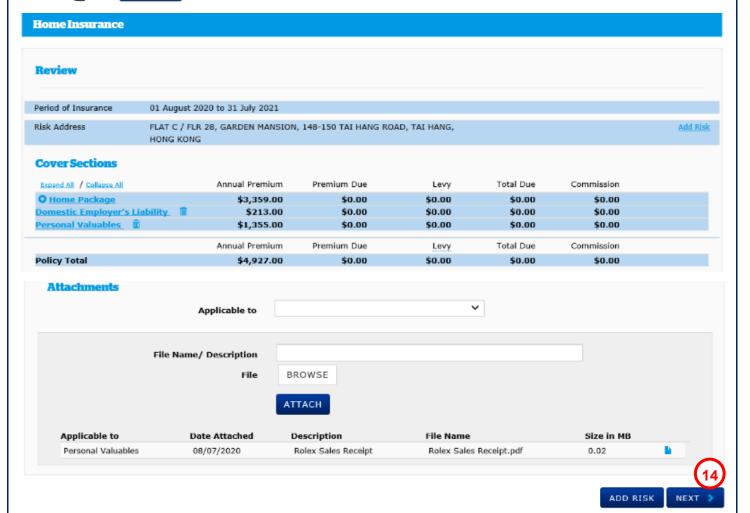
11. System will default endorsement "**Effective Date**" as policy effective date but it can be changed according to the customer's needs.

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

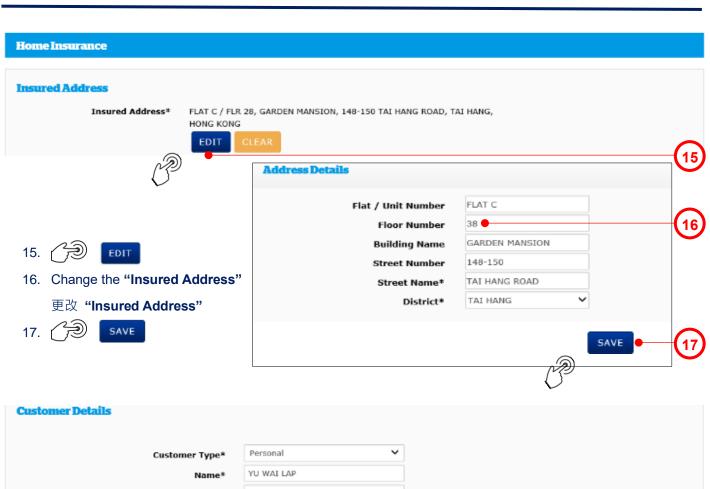
12. Select "Reason" (e.g. "Error correction")

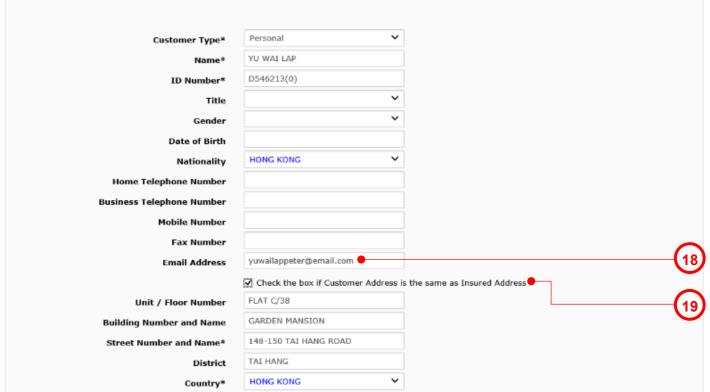
選擇 "Reason" (例如 "Error correction")

- 13.
- SUBMIT
- 14. NEXT







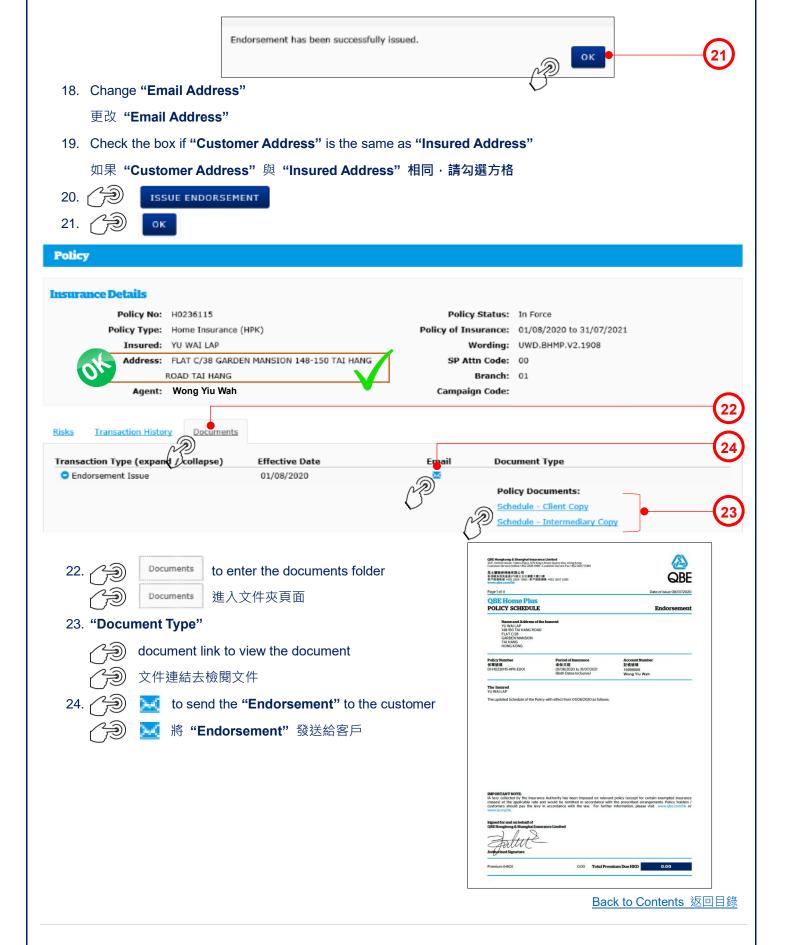


REFER TO UNDERWRITER ISSUE ENDORSEMENT

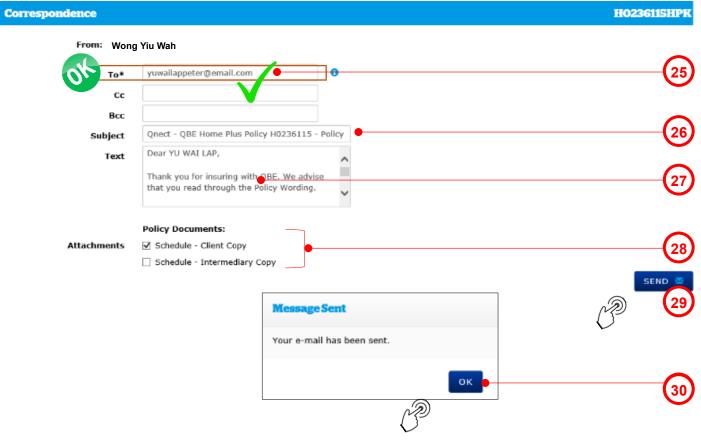












- 25. **"To"** System will default it to be the customer email address (can add other email addresses, using semicolon (;) to separate them) **"To"** 系統會預設它為客戶之電郵地址(可以加入其他電郵地址;並以(;)相隔)
- 26. **"Subject"** System will default the **"Subject"** to be the customer name but you may enter your own subject **"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
- 27. **"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
- 28. "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
- 29. SEND ▼
- 30. A pop-up message will show that the email has been sent and then 页面會有顯示電子郵件已發送,然後 〇〇K



Qnect - Home Insurance Policy H0236115 - Policy Document

QnectAsia@qbe.com

To yuwailappeter@email.com



Attached file: Schedule - Client Copy-ASIA_18111946.pdf 88 KB

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Made possible



31. Customer receives the "Policy Document" email

客戶收到 "Policy Document" 電郵

~ End ~