



# Premium Status Management QGlobal+ - Credit Control Training

November/December 2025



# Agenda

## Part 1 – Project Context

Project Context

Process Changes

## Part 2 – QGlobal+ Premiums Features

Overview of QGlobal+

Premiums Tab – Key Features

Premium Record – Key Features

Premium Status Communication

## Part 3 – Demo

Live Walkthrough of QGlobal+ Premiums  
tab

# Premium Status Management

## Executive Summary

QBE's Multinational programmes are administered via the QGlobal platform a customised version of Microsoft Dynamics CRM solution. The QGlobal application maintains a view of the overall programme, with summary views of the individual policies, claims and client details.

We are introducing a brand new functionality in QGlobal+ that allows you to view, manage and escalate outstanding Local Premiums as well as completing payment date details once premiums are received.

This will replace the current process of capturing the premium status data, which involves duplicated effort due to back-to-back emails and limited visibility of premiums data for the Credit Control teams.

### Key Business Benefits:

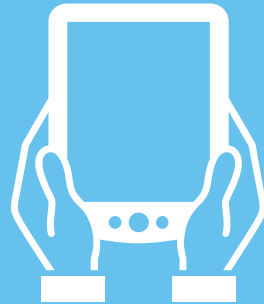
- **Improved visibility of outstanding premiums and their status**, enabling easier and more efficient management.
- **More efficient process** allowing QGlobal+ users to view and update the premium status information themselves, removing the need to send the information to the QBE MSC team.
- **Increase data quality capture**, by enabling you to be able to update premium due dates.

These improvements reduce manual follow-ups and minimise delays resulting in increased operational efficiency across teams.

# Learning Objectives

At the end of this training session you will...

Understand the new  
process of capturing  
premium status

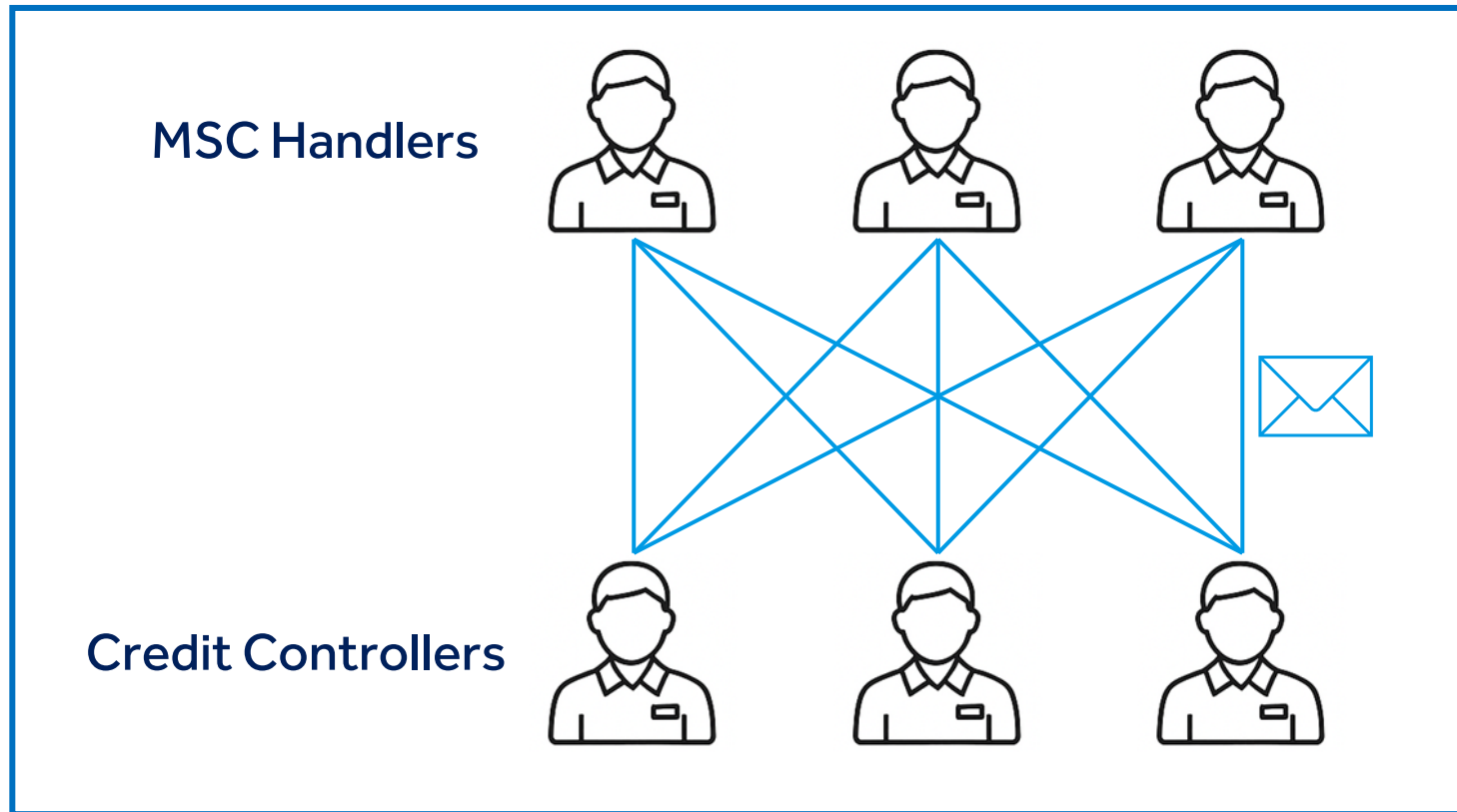


Know where to find  
ongoing support



# How the current premium status data is transferred

Currently emails are sent individually from MSC handlers to you in Credit Control

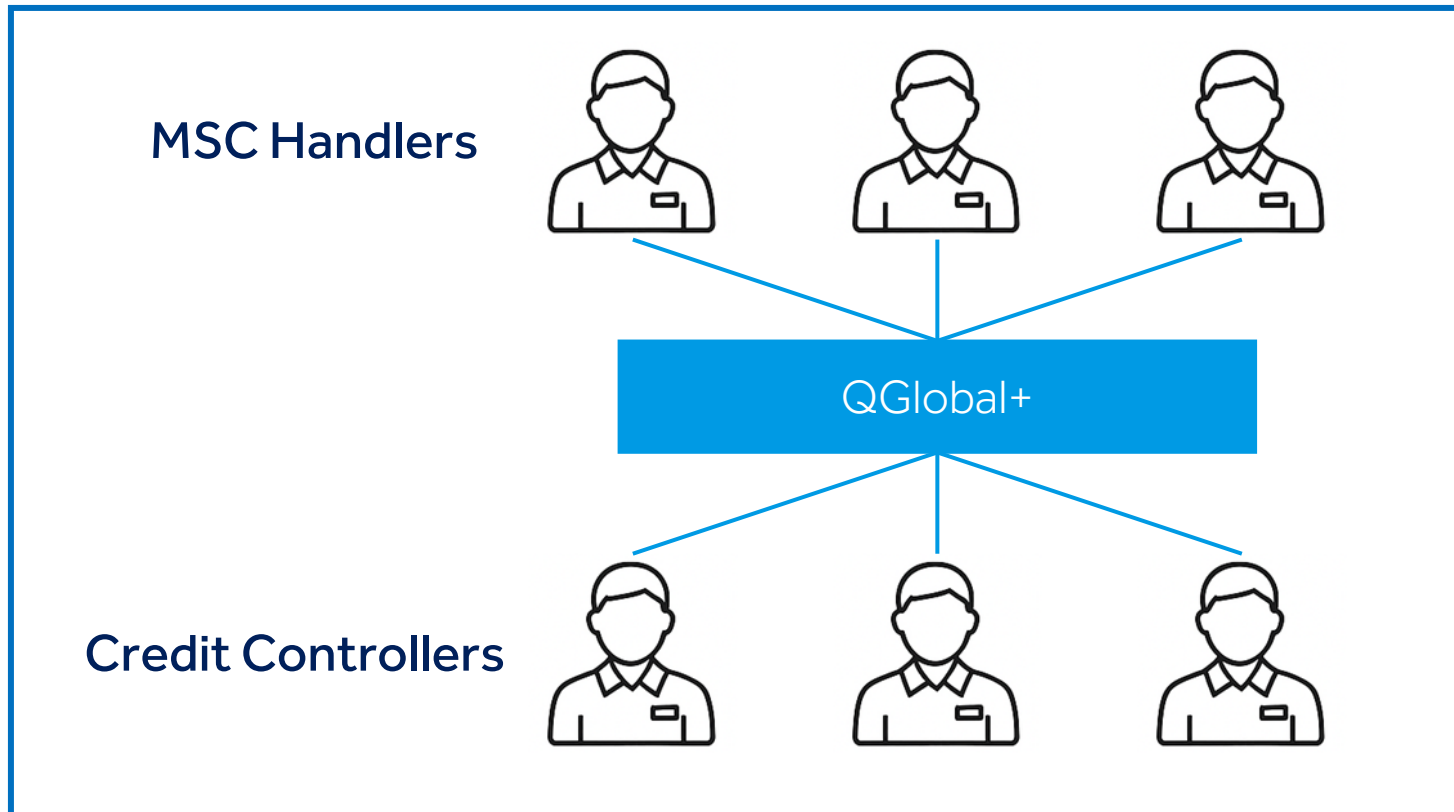


## Problems:

- 1) Large volume of unstructured email traffic
- 2) Poor visibility for everyone as to which premiums are outstanding
- 3) Credit Control unable to inform MSC actual Premium Due Dates

# Future state

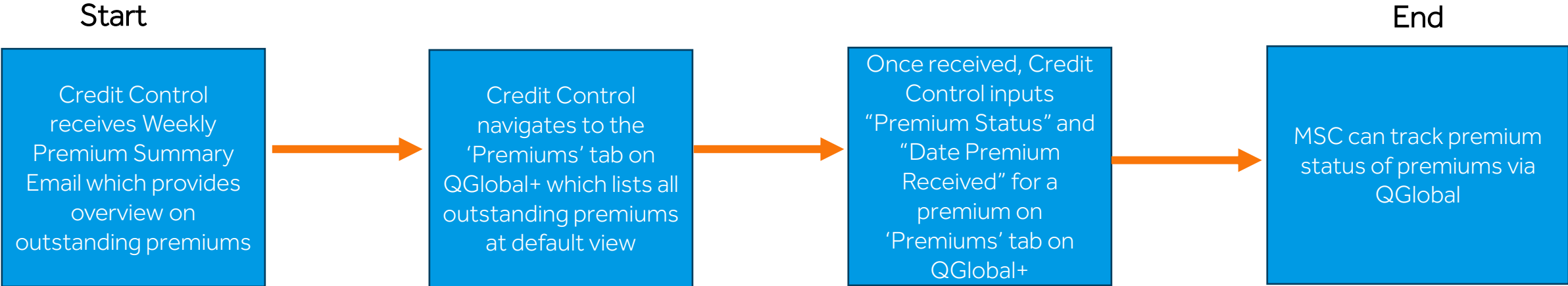
Going forwards all communications and updates will be made through the single QGlobal+ application








Note: The monthly bordereaux process from the MAC (Multinational Accounting Centre) will continue.

# New process walkthrough – QGlobal+ Premiums Tab

Credit Control updating premium status directly in portal



# QGlobal+ Overview

Policy Management	Case & Activity Management	Claims	Reporting & Dashboards	Premiums
				
<ul style="list-style-type: none"> <li>All users can view policy information in QGlobal+ for the policies they manage, including historical, live, and upcoming policies.</li> </ul>	<ul style="list-style-type: none"> <li>Case information is entered directly into QGlobal+ instead of via email to MSC.</li> <li>Activities related to multinational policies—such as local quotes, policy requests, issuance or amendments, and bound programme notices—are managed through workflow functionality between MSC, SOs, and POs.</li> <li>Comments and attachments can be linked to cases for better tracking.</li> </ul>	<ul style="list-style-type: none"> <li>SO claims handlers create or update claims directly in QGlobal+, eliminating the need for forms and emails to the MAC team. Many fields are pre-populated from QGlobal.</li> <li>PO claims handlers and the MAC team receive notifications when a claim is submitted and can update it directly in QGlobal+.</li> </ul>	<ul style="list-style-type: none"> <li>A wide range of reports is available, covering policy, premium, claims, and SO information.</li> </ul>	<ul style="list-style-type: none"> <li>All users linked to the relevant office can view premium information in QGlobal+.</li> <li>Credit Control Users can manage and edit the premium status</li> <li>Credit Control Users can escalate, comment, and attach documents where additional information is required.</li> </ul>

# Sign-in to QGlobal+

QGlobal+ URL

- Access via invitation email
- Visit:  
<https://qbeportal.powerappsportals.com/>

Enter email address and Password

Verify mobile number with the verification code sent

QGlobal+ Home

**QBE**

Sign in

**Welcome to QGlobal+**  
This application is used to share and monitor specific information regarding Multinational policies at QBE.

Sign In

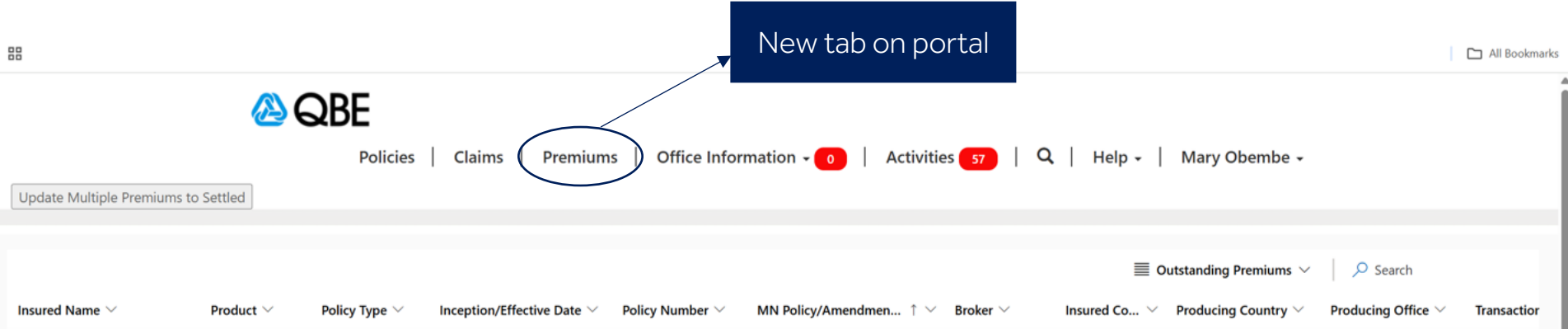
External User QBE User

Privacy Policy Terms of Use Sitemap Contact Us

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# New process – QGlobal+ Premiums Tab

Credit Control updating premium status directly in portal



# Premiums tab – Sorting and Views

## Sorting

All the records are sorted based on below priority:

1. **Premium Due Date** – oldest at the top
2. Grouping premiums together tagged to same **Programme ID**

## Views

By default **Outstanding Premiums** View is loaded and shows only **Partially settled** and **Not settled** premiums.

Other views include:

- **Settled Premiums** – Premiums paid by the local insured to the local insurer
- **Escalated Premiums** – Premiums which have been escalated by Credit Control to the MSC or requesting support
- **Note Added Premiums** – Premiums which MSC have added a comment for Credit Control to action

# Premiums tab – Bulk Update Functionality

Update Multiple Premiums to Settled

Date Premium Received:

Insured Name <input type="checkbox"/>	Product <input type="checkbox"/>	Policy Type
<input checked="" type="checkbox"/> ...	...	General Liab... Local
<input checked="" type="checkbox"/> ...	...	General Liab... Local
<input type="checkbox"/> ...	...	Cyber Local
<input checked="" type="checkbox"/> ...	...	Cyber Local

## Updating multiple premiums to Settled

Using the 'Updating Multiple Premiums to Settled' button, the user can select multiple premiums and populate the date received.

This will then automatically set all selected premiums to premium status 'Settled'.

## Settled Premiums view

Once premiums are 'settled' they will move to the 'Settled Premiums' view

## Incorrect date on bulk update

The button is available on the Settled Premiums view. This means you'll be able to select the incorrect premiums and repopulate the correct date using the bulk update tool.

# Premium Record

The Premium Record is split into three sections:

## Policy Details

- Includes direct link to additional policy details

## Premium Details

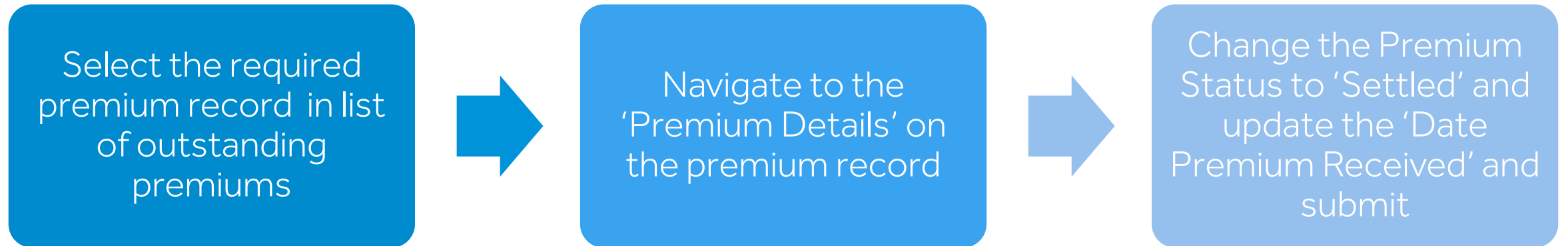
- Updating status (only allows date premium received to be updated when status set to settled)

## Premium Log

- Includes all commentary from both credit control and MSC

# Premium Record - Updating Premium Status

## Updating an individual premium record



# Premium Record – Action Buttons

Communicating to the MSC through the portal

## Escalate/Request MSC Support

- Ability to escalate to MSC for:
  - No response from local broker/client
  - Partial Payment
  - Premium Allocation Query

## Add a comment/attachment

- Send general communications or attachments to the MSC

## Update Due Date

- Ability for Credit Control to update the due date if the current date is incorrect
- Note: If the user tries to change the date beyond 6 months this will be flagged

## Email Premium Log

- Any comments or changes to the premium record is documented in a log on the record – the user can email this log detail to themselves for future reference

# Premium Record - Correction Premiums

For correction premiums involving financial changes, these will automatically appear as **'Partially Settled'** on the portal. Details will be provided showing the amount paid to date in the premium log and the premium details section will show the total premium due.

Example note:

Record details

less than a minute ago  
GL-CSAP-QGlobal-SA2 # Created On Date(UTC): 12/11/2025 14:18

Please note that you have previously informed us that by the , you have received a total premium of 85349 .

The amounts shown above are the Gross Premium(s) only excluding any Broker Commissions or Insured Taxes as part of the transaction. Broker Commissions and Insured Taxes should be included in the collection as invoiced and any issues/partial payments should be actioned accordingly, e.g. escalate to the MSC as needed.

about a minute ago  
GL-CSAP-QGlobal-SA2 # Created On Date(UTC): 12/11/2025 14:18

Escalated To MSC updated from 'Yes' to 'No'.

about a minute ago  
bythema Srimkanti Created On Date(UTC): 12/11/2025 14:18

# Premium Status Communication

## Multinational Premiums Summary Email



Weekly summary email includes the below information:

- Link to the QGlobal portal
- Steps to populating the premium status
- A list of overdue premiums
- Information on requesting for support or escalating any issues

## Multinational Premium Notification Email

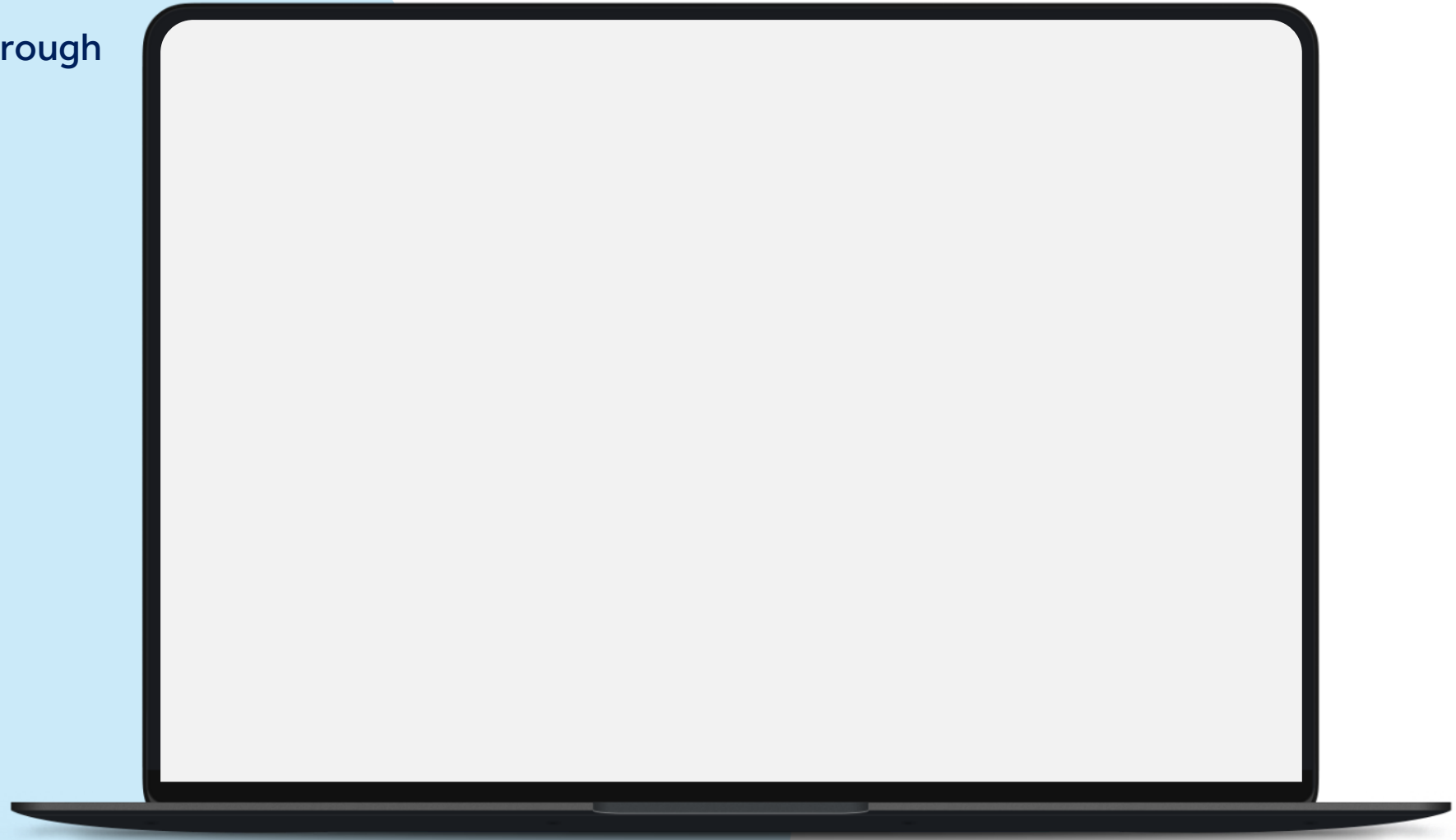


If required, an ad-hoc email will be sent daily when the MSC have responded to any comment or escalation raised by Credit Control via the portal. This will include:

- A list of premiums which have a comment/response from the MSC

# Demo

QGlobal+ Premiums tab walkthrough



# What you need to do

## Summary

### Key Takeaways

- 1 **Important:** Credit Controllers will receive an invitation code to access QGlobal+, this code is valid for 24 hours.
- 2 Credit Controllers will begin to receive a Multinational Premiums Summary email every Monday and can use the link in the email to navigate to QGlobal+ Premiums tab.
- 3 Once premium has been received, please navigate to the relevant premium record and populate the 'Premium Status' to Settled and populate the 'Date Premium Received'.
- 4 Communication to the MSC can be made directly through the portal – please use the buttons 'Escalate/Request MSC Support' or 'Add a comment/attachment' on the record

# How you will be supported

## Available resources



### Quick Reference Guides

We have produced a quick reference guide, please click [here](#) to access this.



### Network Managers

Network Managers will be on hand to support you with any queries relating to the contents of this training.



### Training Pack and Recording

You can relisten to the training session anytime and review the materials, by clicking [here](#).



### Multinational Technology Team

If you have access issues or functionality queries, feel free to contact [MultinationalTech@uk.qbe.com](mailto:MultinationalTech@uk.qbe.com)





**Thank you.**

# Key Abbreviations

- **MSC** – Multinational Servicing Team
- **MAC** – Multinational Accounting Centre
- **PO** – Producing Office
- **SO** – Servicing Office
- **CC** – Credit Control