

### Getting started

**Before completing** the onboarding form, please:

- Download the latest available version on our website; *and*
- Enable the dynamic content of the form

! SECURITY WARNING Macros have been disabled. Enable Content

! SECURITY WARNING Automatic update of links has been disabled Enable Content

The form contains dynamic content so that you only need to respond to questions that are relevant to you.

Follow your progress **while completing** the form

**Checklist**

Overall Onboarding progress	76%
This list will automatically update to reflect your progress in the following table:	
Your Company Details	100%
Thank you for completing this section	
Your Lines	100%
Thank you for completing this section	
Your Markets	80%
You need to tell us all the Markets you want to trade with on PPL	
Your User Details	25%
You need to add at least one team and one user	

All sections turn green once complete

### 4 steps to complete the form (4 types of information we need to know)



#### 1 Your Company Details

In addition to your **general company information**, such as your **registered company name, address and logo**, you need to provide the following **10 points of contact**. We understand that some contacts may be the same for different roles:

- |   |   |
|---|---|
| <p><b>1. PPL Approvers</b><br/>Approvers will authorise the setup of new users, if required, and authorise changes to your company details - we encourage the nomination of two approvers.</p> <p><b>2. Future Connection Contacts</b><br/>When new stamps are configured on the platform, we will either notify you once you are connected or seek your prior approval before establishing the new connection.<br/><i>See "Your Markets" - "New Stamps Connection Approval"</i></p> <p><b>3. PPL Sponsor</b><br/>Someone who champions and actively promotes the use of PPL within your organisation.</p> <p><b>4. PPL C-Suite</b><br/>This is a senior C-level Director (CEO, CIO, COO,...) who supports the implementation of PPL in your organisation. From time to time, we organise events, such as the PPL C-Suite Breakfast where we invite your C-Suite contact and discuss various topics relevant to electronic placement.</p> | <p><b>5. PPL Point of Contact</b><br/>The day-to-day conduit to the PPL Team for onboarding, configuration, training and other general inquiries.</p> <p><b>6. Finance Manager</b><br/>We direct all our invoicing queries and send our invoices to the Finance Manager.</p> <p><b>7. Publicity contact</b><br/>The publicity contact will be listed on the PPL website alongside all the other publicity contacts. You agree that other firms may contact the Publicity Contact in relation to PPL.</p> <p><b>8. Business as usual contact (BAU)</b><br/>The contact for BAU and Service Management queries.</p> <p><b>9. Data Protection Officer (DPO)</b><br/>The DPO contact will be the contact for GDPR queries.</p> <p><b>10. In-house Trainer</b><br/>If you have in-house training facilities, the in-house trainer is invited, from time to time, to courses ahead of significant releases.</p> |
|---|---|

#### 2 Your Lines

You need to tell us the **Lines and Classes of Business you place** to help us understand your company and the markets you wish to be connected to.

Our Easy selection tool enables you to cascade your response down to save you time

Energy	Yes	
<i>Do you place:</i>	<i>Please select</i>	<span style="border: 1px solid red; padding: 2px;">← Easy selection tool.</span>
Onshore Energy?	Please select	✗
Offshore Energy?	Please select	✗
Energy Liability?	Please select	✗
Power (Including Nuclear)?	Please select	✗
Any other classes within your Energy department?	Please select	✗

### 3 Your Markets

#### Day 1 connections

For each Lines of Business that you have said to place in "Your Lines", in this section, you need to tell us if you want to be connected to all markets available on PPL.

**Yes** You will be connected to all Markets on PPL

**No** You will need to complete the additional tabs that appear in the form and specify your custom connections. We will only connect you to the carriers / underwriters/stamps that you provide.

Do you want to be connected to all markets for the following Lines of Business that you place (as selected in "Your General Information")?

Progress  
75%

Aviation	Yes	✓	You will be connected to all Markets
Financial and Professional Lines (FPL)	No	✓	Please complete the FPL Markets Worksheet
Marine	No	✓	Please complete the Marine Markets Worksheet
Property	Please select	✗	
Reinsurance (RI)	Please select	✗	
Accident & Health (A&H)		✓	You do not place Accident & Health (A&H) business
Bloodstock/Livestock		✓	You do not place Bloodstock/Livestock business
Casualty		✓	You do not place Casualty business

Navigation: Welcome | Checklist | Your Company Details | Your Lines | Your Markets | **FPL Markets** | **Marine Markets** | Your User Details

#### Future connections

You need to tell us whether we can connect you to new stamps setup on PPL without your prior approval or whether your prior approval is required.

#### New stamps connection approval (future connection preference)

Please select your future connection preference when new stamps are being made available on the platform:

Connect to all new stamps made available on PPL and notify us once the connection is available	Please select	✗
Do not connect to all new stamps made available on PPL without our explicit prior approval	Please select	✗

### 4 Your User Details

In this section you need to **list your teams**, your **users** and their **roles**, as well as the team(s) each user belong to.

You can setup **as many teams as you like** and **users can belong to multiple teams**. Users who will need an overarching view of several or all teams, because they place business from multiple teams or for MI purposes for instance, will need to be members of all the teams they need to see.

#### Teams

##### 1. Team Name:

The team name can be a Line of Business (Marine Team) or a Location (London)

##### 2. Broker Code:

Your Lloyd's broker code. If you do not know your broker code(s), please visit <https://www.lloyds.com/market-directory> or contact your Lloyd's representative.

##### 3. Cover Placed:

We need details of the cover(s) placed by the team even if the team name is self-explanatory.

#### Users

##### Roles:

##### 1. Broker:

A Broker is able to create, edit and send quotes, firm orders and endorsements under personal name.

##### 2. Technician:

A Technician can only send *on behalf of* a user with the "Broker" role.

##### 3. Read-Only:

A Read-Only user can only view risks/documents.

##### Extra Roles

##### 1. Internal Approver:

Will be made available for users to send a firm order request through for second approval prior to sending to the market.

##### 2. Backload Administrator:

Allows the broker to backload facilities using the platform.

##### 3. Superuser:

A Superuser belongs to all team. Superusers can be Brokers, Technician or Read-Only.