

It is common practice in insurance to have multiple versions of the same document due to the back & forth nature of negotiations - very often with multiple parties. The manual process of marking up documents, comparing who agreed what/when can be cumbersome and time consuming.

Within the PPL Platform, you can compare any changes that are made to documents automatically, whilst keeping track of each version. This is as simple as tracking changes on a word document in Microsoft Office but PPL does it for you.

Question

How do I keep track of changes in multiple versions of the same documents on PPL?

Answer


1 Select the **Messages & Documents*** icon  to go to the audit trail of selected **Placement**.

* The **Messages & Documents** icon is available in various places throughout the platform. See page 2 for more details.

! The Documents format supported for the functionality to work are:

- Microsoft Word
 - RTF
 - PDF
- It is possible to compare two documents types but **the functionality gives best results with Microsoft Word documents.**

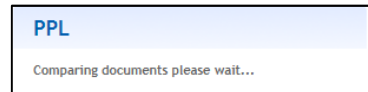
2 Check the box of any two documents to compare:



2 The **second document you select** will be treated as the **new version**

! The **first document you select** will be treated as the **original document**

3 A message is displayed whilst the documents are being compared



4 Once the comparison is complete, a Word document mark-up is produced and opened or downloaded automatically depending on your browser.

You must have Microsoft Word installed on your computer for this function to work.

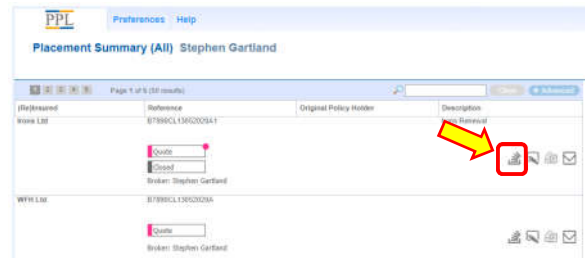
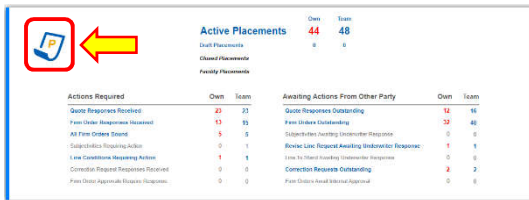
RISK DETAILS	
Type	Accident & Health
Form	TBA
Name of the Assured	Irons Ltd
Address of the Assured	125 Old Broad Street London United Kingdom
Policy Period	From: 31 st December 2019 To: 31 st December 2020 Both days at 12.01 a.m. Local Standard Time at the Address of the Assured.
Limit of Indemnity	GBP 4015,000,000 in the aggregate
Excess of	Nil/GBP 5,000 each and every Claim
Territorial Limits	Worldwide

Where do I find the **Messages & Documents*** icon ?

The **Messages & Documents** icon is available in various places throughout the platform and the most direct and common places to find it are listed below:

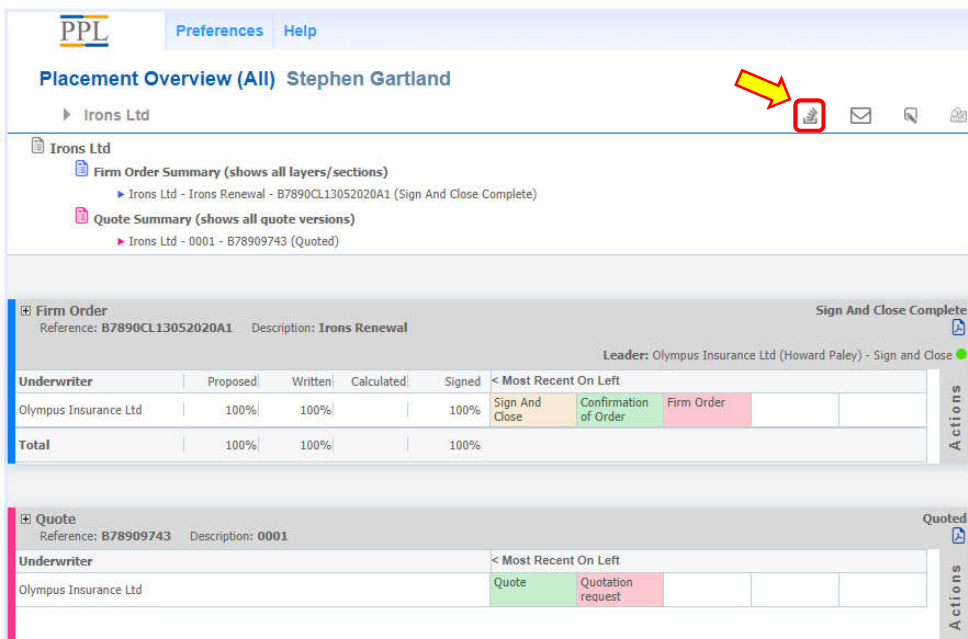
2 clicks from the **Dashboard**

- 1 From the Dashboard, click on the **Placements** icon  to get to your **Placement Summary** page
- 2 Find your **Placement** and click on the **Messages & Documents** icon 



From within a **Placement**

In your Placement, the **Messages & Documents** icon can be clicked on the top right of the **Placement Overview**:



The **Messages & Documents** icon can also be found elsewhere in the broker's and underwriter's respective views. Please contact PPLSupport@ebix.com if you need help finding the icon.