

## Summary

PPL (Placing Platform Limited) is pleased to announce that it has successfully deployed its latest release which focuses on functional enhancements to continually improve the user experience.

This release contains 25 changes across the following functional areas of the platform: -

General	Brokers	Underwriters
Dashboards	Quote	Reassign
Data Management	Documents	Firm Order Response
	Platform Navigation	Endorsements
	Endorsements	Facilities
	Firm Order Submission	

We have produced a user guide to support the release of 2.2.0, which is available in the LMS.

In addition to our scheduled changes, PPL have included 38 defect fixes, that were raised by market users. These users will receive confirmation that their defect has been resolved via an email from the PPL Business Service Desk ([support@pplnextgen.com](mailto:support@pplnextgen.com)).

There will be two further releases this year; 17<sup>th</sup> November, which will be focused on defect fixes, and another planned for 1<sup>st</sup> December that will contain further improvements. In addition, PPL will be working with a small number of brokers in Q4 to test our pilot API delivery, connecting brokers own systems to PPL Next Gen.

The development of our API capability will set the foundations for PPL to support the market’s ambition of becoming better, faster, and cheaper through digital transaction processing. Our plans include adding CDR support to enable connection with the Blueprint 2 digital gateway in time for its initial rollout in 2024.

## Key Updates - General

### Dashboards

- **The ability to remove completed items from worklists without having to use the filter every time.** A toggle has been introduced to allow users to remove completed items from their worklists. The toggle is switched on to remove completed items by default and will remember the user’s settings when they log off or return to the dashboard.

### Data Management

- **The Approved By column has been removed from the Transaction Log.** The second approval process is internal to an organisation, and on feedback from the market, this will be removed from the transaction log.

## Key Updates - Brokers

### Quote

- **Brokers can withdraw Quote requests.**

### Documents

- **Brokers can generate a Firm order/Security Details document from the Overview Screen.** For contracts that are signed and closed, brokers can select ‘Generate Firm Order Doc’ via the ellipsis menu.

- Option available for brokers to generate a Firm Order document only showing one Carrier per page.
- All documents attached to facility declaration are sent to all facility participants. Documents can be shared with non-agreement parties on a facility market.

#### Platform Navigation

- The “Show My Placements only” button on the placement dashboard retains user selection. Where this toggle has been selected, it persists when a user navigates away from the page.

#### Endorsements

- Brokers can create an endorsement submission pack where the lead underwriter is off platform. This allows a broker to track where endorsements are in the process and updates agreement parties (as applicable).
- Underwriters with an Endorsement role of “Agree All Endorsements” will always be sent the endorsement for agreement, regardless of practice.

#### Firm Order Submission

- The ‘Broker admin without markets’ role cannot create a Submission Pack or view the Underwriter tab.
- Improvement to the Sign & Close process. These include: -
  - Sign & Close cannot be completed where sections are in Draft or Quote status.
  - Sign & Close cannot be completed where there are outstanding conditional acceptances.
  - Underwriter lines will only appear when they are Accepted or Bound.
- Where a contract has an off-platform Underwriter and the contract is not “Firm order ready”, the Add Underwriter response link will be disabled. This will prevent the status of a contract or section being incorrectly moved to Firm Order and locking the data.
- Personal and general messages boxes increased from 256 characters to 8,000 characters. This will allow users to create and send more detailed messages to support a submission.

## **Key Updates - Carriers**

#### Reassignment

- Ability for Underwriters to re-assign requests for subsequent processing when they have been signed and closed. This will allow Underwriters to re-assign broker requests when they have been signed and closed. Furthermore this will allow for subsequent processing (corrections, endorsements etc) to be completed by the newly assigned Underwriter.

#### Firm Order Response

- MRC attached to Firm Order Request Notification Emails. The MRC will now be included on all emails pre bind so they do not have to log in and download the document.
- Once the leader’s line is accepted, the leaders stamp, and written line amount/percentage is displayed. Enables a follow underwriter to see the leader’s stamp details on a contract/section once the leader has accepted so they are aware of what stamps they will be following.

#### Endorsement Submissions

Underwriters can answer multiple participations using a dropdown on the Underwriter response screen. This replicates the functionality available on the underwriter response screen. This will introduce a time saving by reducing the number of clicks to move between participations.

### Facilities

- **Ability to delete a stamp(s) on the Underwriter Response screen for a facility declaration.** Users can choose to remove stamps that are not relevant to a specific declaration by clicking on the rubbish bin icon.

### **Contact us.**

If you have any questions or queries about this release, or if you would like to find out more about PPL Next Gen, please contact [pplenquiries@placingplatformlimited.com](mailto:pplenquiries@placingplatformlimited.com) or your dedicated PPL Relationship Manager.