Release 2.5 (Apr 2024) Features

Contents

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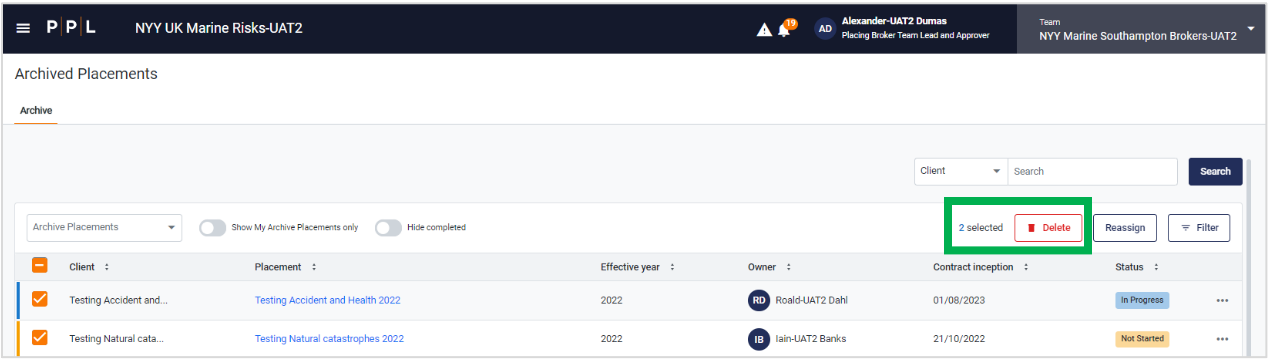
This document highlights some of the new or improved features available in Release 2.5 (April 2024).

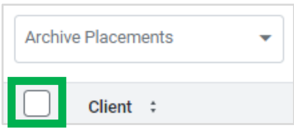
Brokers – Delete Multiple Records in the Archive

When using the Archive Placements process, Brokers now have the option to delete single or multiple placements from the Archive.

1. From the main menu select **Archived Placements**.
2. **Filter**, **Sort**, or **Search** to find the archived placements you wish to delete.
3. To delete a single placement, select the ellipsis menu on the right of the screen and select **Delete**.
4. To delete multiple placements, select the check boxes on the left of the screen and select the **Delete** button:



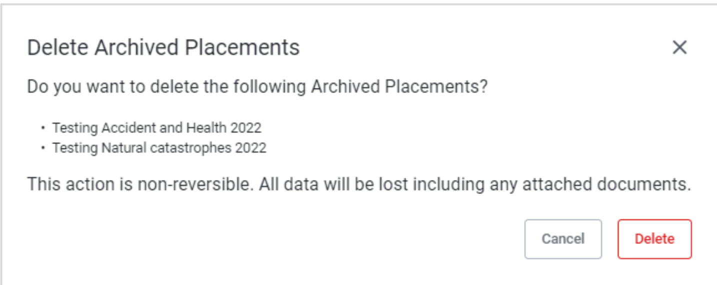
Note: To select of the placements in the displayed list, select the checkbox at the top of the column.



Click this again to deselect all the placements.

If only a few placements in the list have been selected, select to deselect them.

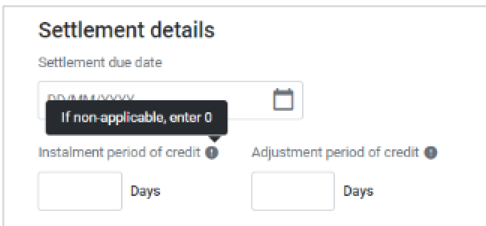
5. Read the information on the screen that appears and select **Delete**.



The archive placements will now be deleted.

Brokers – Adjustment Period of Credit Not Applicable Information

When entering the Settlement Details for a contract or section, the **Adjustment Period of Credit** and **Instalment Period of Credit** fields now have a tooltip advising them what to do if these fields are not applicable.

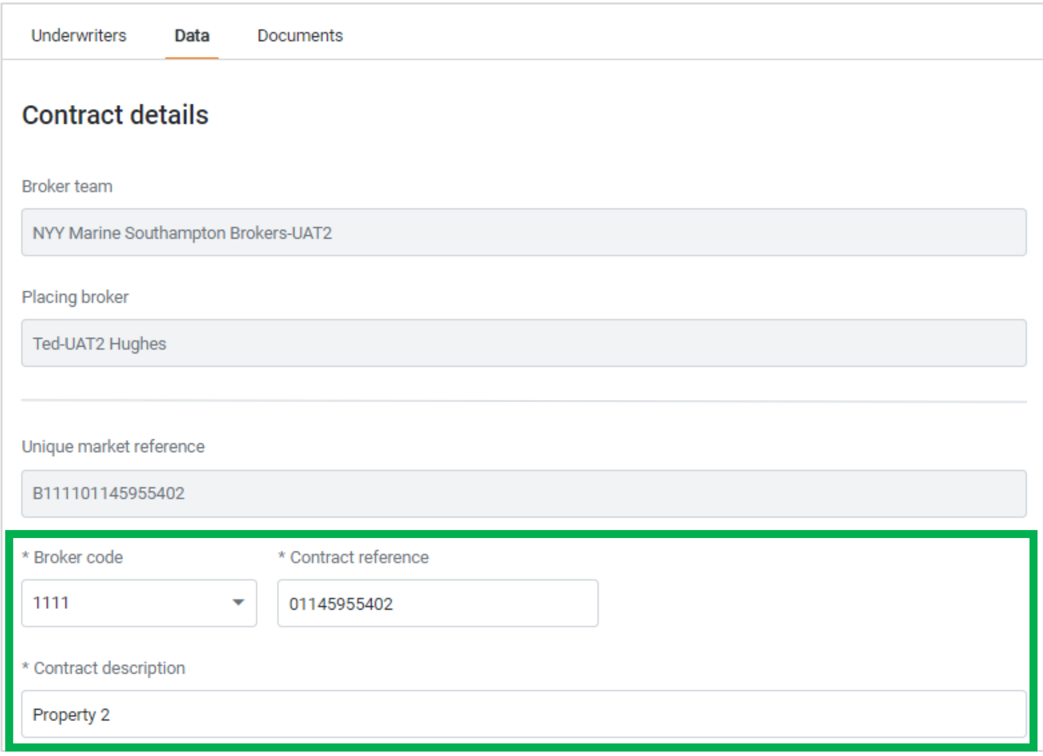


Brokers – View and Download Document Options

1. On the Structure tab, select the required contract, section or endorsement.
2. On the right of the screen, select the **Documents** tab.
3. To **view** the document, select the document's **File Name**. The document will open in the document viewer.
4. To **download** the document, select the download icon ⬇. The document will now be in your Downloads folder in Windows Explorer.

Brokers – Mandatory Fields Highlighted

When entering the contract or section data, the mandatory fields are now highlighted with and asterisk *

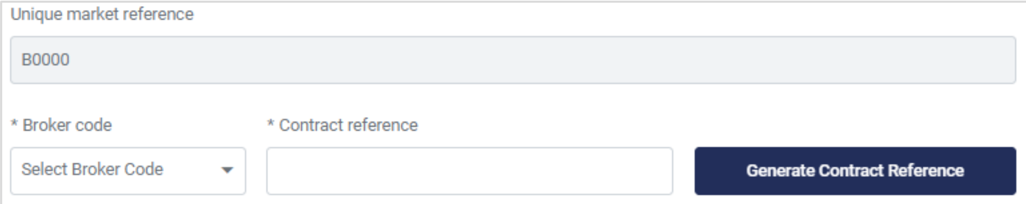


When saving the data, if all the mandatory fields have not been completed, each field will be highlighted in red and display a message.

Brokers – Fields to Not Pre-Populate

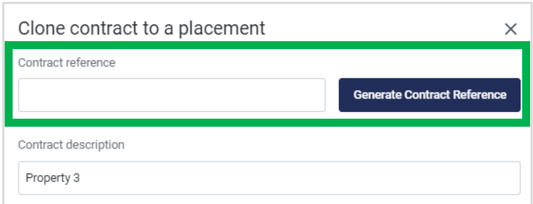
When creating a contract using the **Add Contract (data)** option, the **Inception Date**, **Contract Description**, and **Contract Reference** will now not be pre-populated. This will reduce the chances of incorrect information being left in those fields when submitting the contracts to Underwriters.

If the Broker requires a unique contract reference number to be created, they can select the **Generate Contract Reference** button.



This button will not be available when in Cancel & Replace mode.

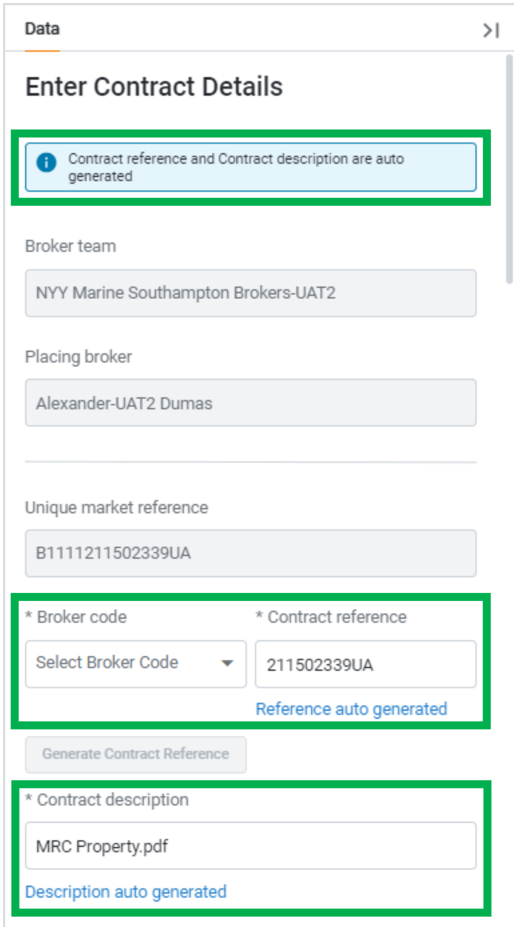
The same applies when the Broker chooses to **clone** a contract. The option to **Generate Contract Reference** appears at the top of the screen. Select this to create a reference or select **Clone** and enter your own on the Data tab.



If you prefer to create new contracts by using the **Browse or drop here** field, the options are slightly different.

1. Add the contract document as normal.
2. In the **Enter Contract Details** panel, the **Contract reference** and **Contract description** are auto-generated, but warning messages appear at the top of the screen and under the relevant fields.
3. Select the required **Broker code**
4. Delete the Contract reference and select the **Generate Contract Reference** button.
5. Edit the **Contract description** field as required.
6. Complete the remaining fields as required and select **Save**.

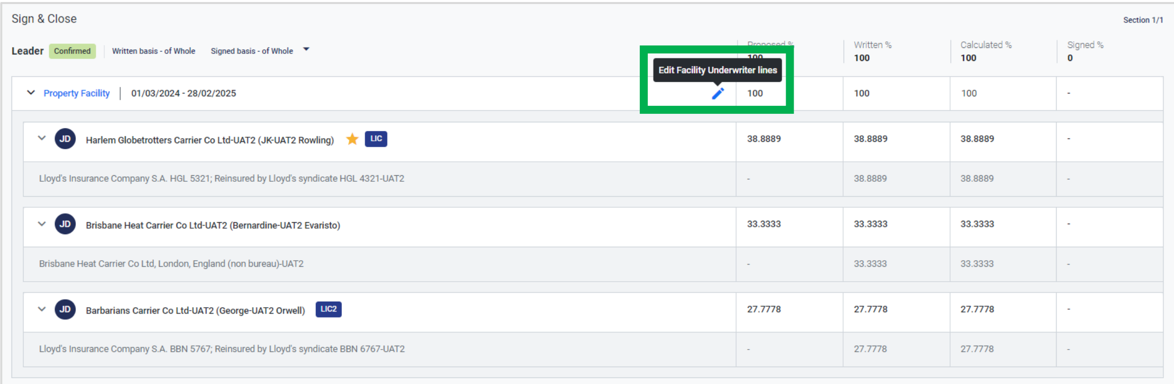
Note: If the auto-generated fields have not been changed, a further warning will appear when saving.



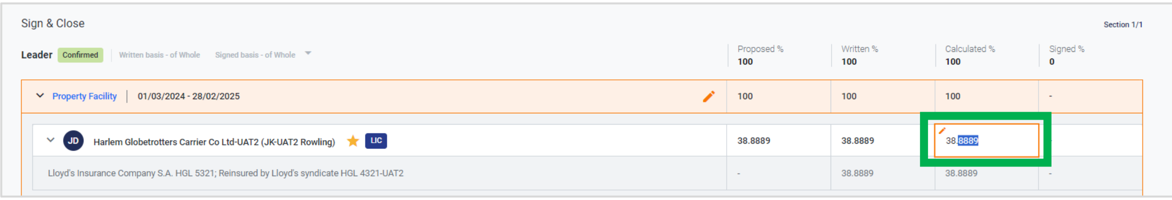
Brokers – Manually Calculate Signed Lines in Declaration Facility Panel – (TBC)

Certain lines of business require the ability for Brokers to manually adjust the calculated/signed lines within a declaration facility panel, as they can for open market business. This will still require the Broker to adhere to the Underwriters' written lines, the facility panel's total signed line and line to stand conditions.
This option has now been enabled to provide greater flexibility.

1. Create the declaration as normal and add the required facility panel.
2. Create and send the Submission Pack containing the declaration to Underwriters.
3. Once all the written line responses are received for the declaration, select the **Overview** tab.
4. On the declaration, select the ellipsis menu and choose **Sign and close**.
5. Select the **Calculation decimal places** and enter the **Order %**.
6. Select **Calculate & Save**. The **Edit Facility Underwriter lines** icon will appear – select the icon.



7. Select a **Calculated %** field and enter the required figure. Repeat this for each Underwriter's line as required.

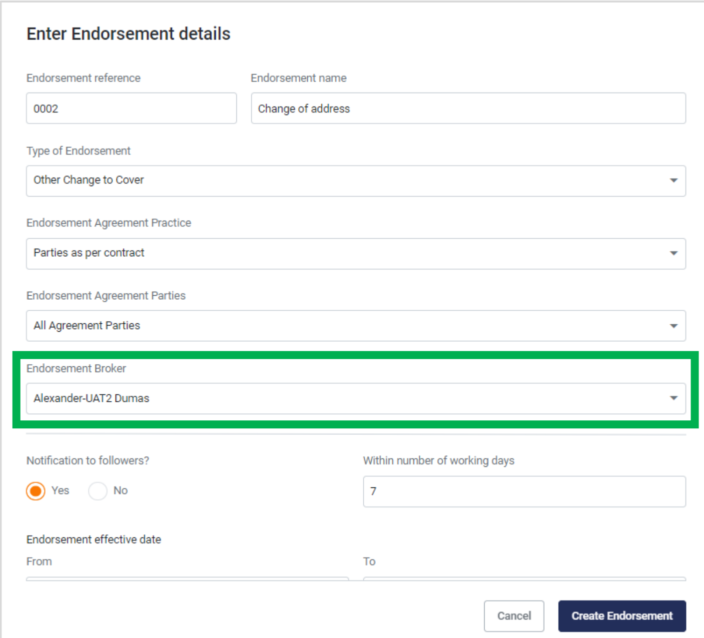


8. Select **Save**.
9. Select **Sign & Close**.

Brokers – Select Broker to Receive Underwriter Responses on Endorsements

Brokers can now select which colleague should be notified of Underwriters responses on endorsements, rather than all responses going to the Placing Broker.

1. On the Structure tab, select the contract or section to endorse.
2. Select the ellipsis menu and select **Create Endorsement**.
3. On the **Enter Endorsement details** screen, enter the required details.
4. The **Endorsement Broker** field will default to the name of the Broker creating the endorsement. To change this, select the field and choose the required name.
5. Once all the appropriate fields are complete, select **Create Endorsement**, then submit it to Underwriters when required.



Brokers – Reassigned Declaration Requests Update on the Broker Side

When a declaration request is reassigned by an Underwriter to a colleague, the Responsible Underwriter details will update on the Underwriters tab for the declaration. This will ensure the Broker knows who the responsible Underwriters are for that declaration.

The new responsible Underwriter details will also be shown in the generated documents.

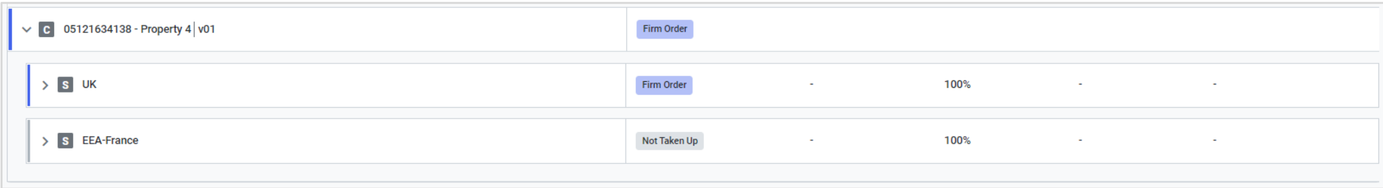
If the declaration is reassigned after it has been signed & closed by the Broker, the Underwriter who bound the risk before it was reassigned will still appear on the generated documents.

Brokers – NTU Sections Not included in Sign & Close Screen

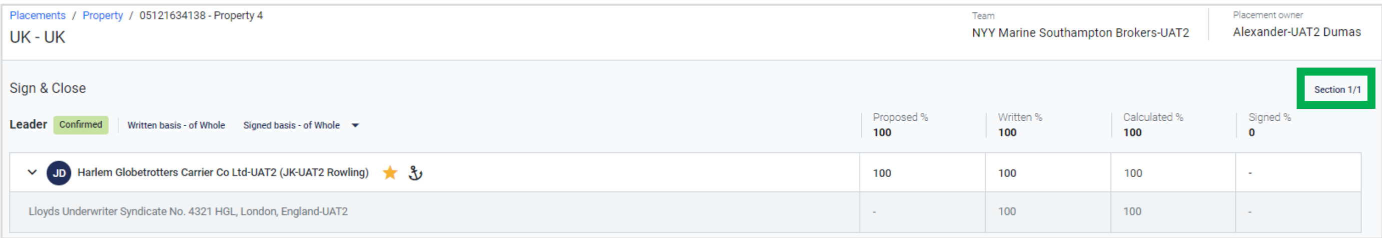
If the Broker has submitted a firm order request on a section to Underwriters, they can withdraw that section and mark it as **Not Taken Up (NTU)** if required.

On the Overview tab, when the Broker selects Sign & Close for the contract, the section(s) marked as NTU will not appear, making the sign & close process clearer.

In the example below, the Overview tab is shown after the EEA-France section has been withdrawn and marked as NTU:



The UK section has been accepted by the Underwriter and the Broker has proceeded to the Sign & Close screen for the contract, where the EEA-France section does not appear:



The Broker can now sign & close the contract.

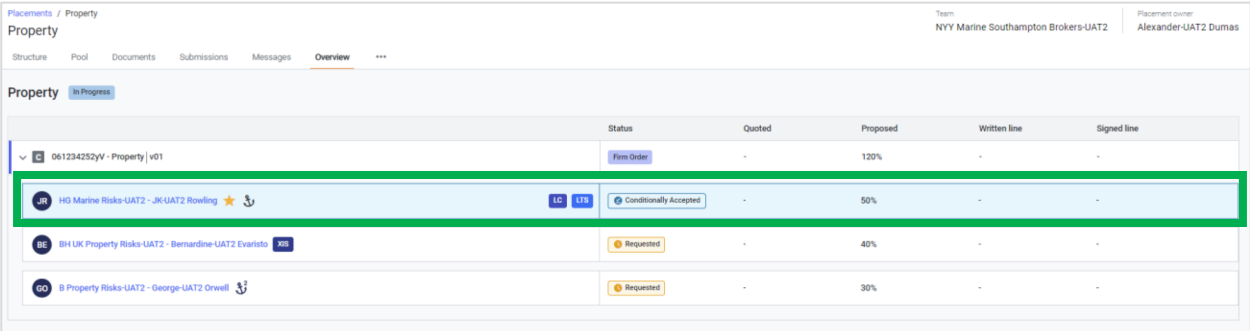
Brokers – Underwriter's Response – Items Requiring Action Expanded

When the Broker receives a response from an Underwriter on a contract or section that requires them to take an action on e.g. a stamp has been added or line conditions included, the relevant area of the Response Details screen will be expanded automatically.

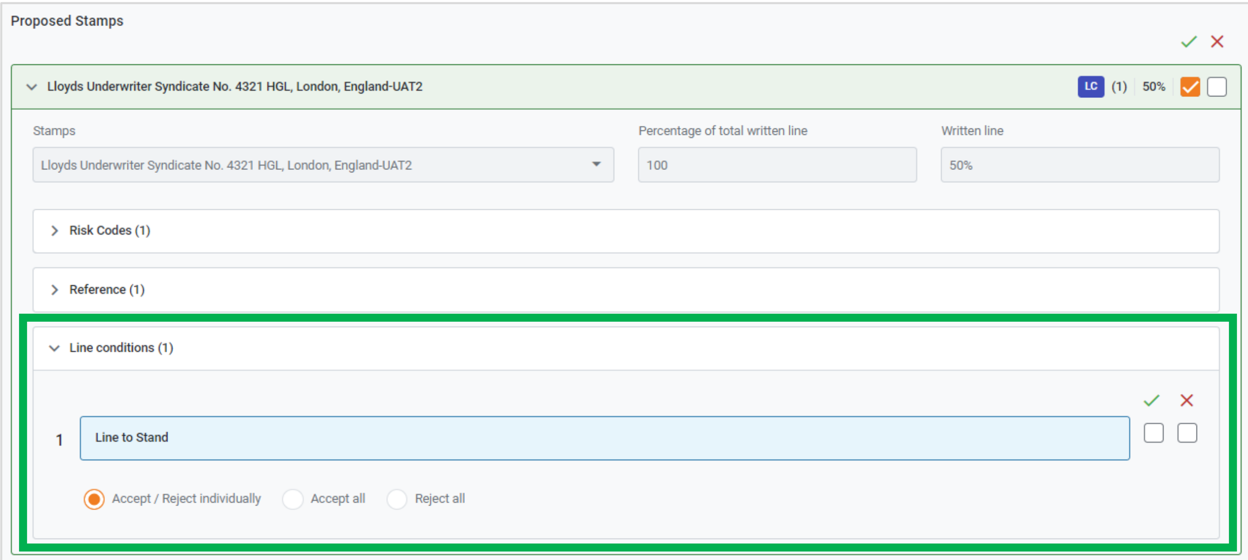
This makes it easier for Brokers to see which items on the Underwriter's response need attention.

1. Select the hyperlink in the email and/or the notification in PPL.

2. On the **Overview** tab, select the Underwriter that has responded with an action for the Broker to complete.



3. The contract will open on the appropriate screen with the relevant item expanded. In the example below, the Underwriter has added a line condition, and it's this item in the Underwriter's response that is expanded.



Note: If there are multiple items requiring an action, the Broker will be navigated to the first one on the screen.

Brokers and Underwriters – Dashboard Search

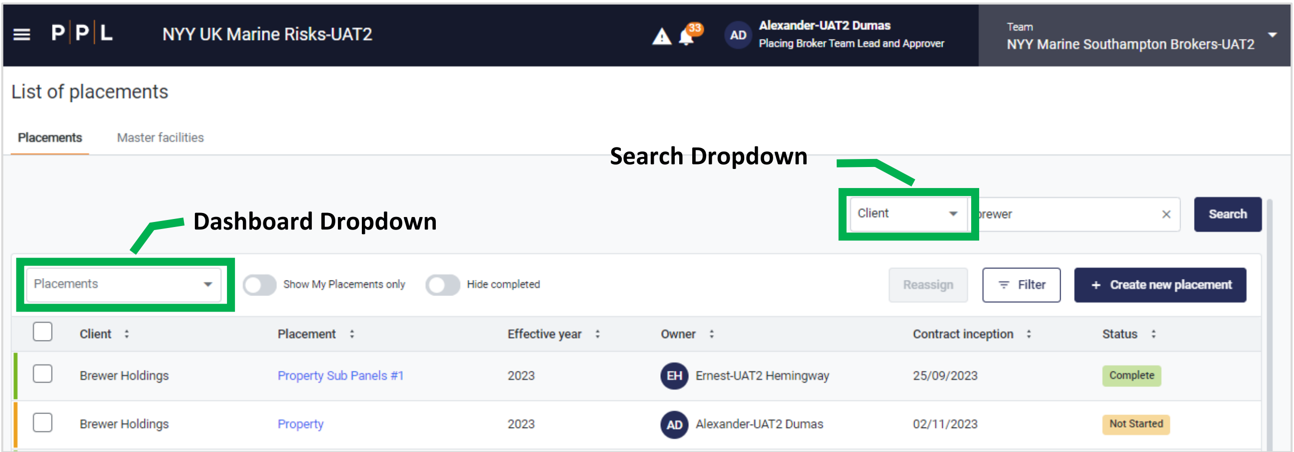
On the dashboard screens (Brokers - List of Placements, Underwriters – List of Broker Requests), there are now search fields enabling users to search structured data related to placements e.g. placements, programmes, contracts, endorsements, approval requests, broker requests etc.

This enables Broker and Underwriter users to find relevant information faster than previously.

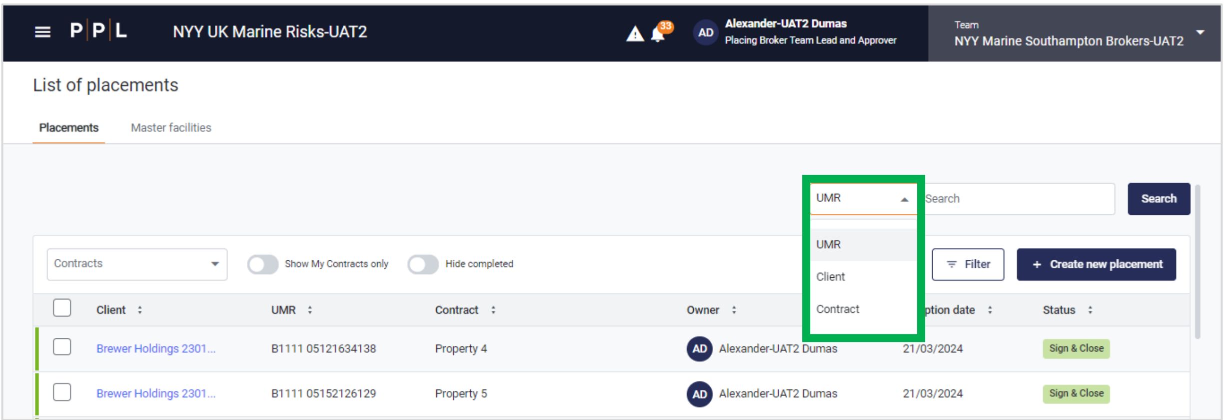
Note: The search facility is also available in the Archived Placements area of the platform.

Brokers

1. If you have access to multiple teams, at the top-right of the screen select the required **Team**.
2. On the **Placements** tab, select the required view from the **Dashboard dropdown** menu e.g. to search for a UMR, select **Contracts** from Dashboard dropdown menu.



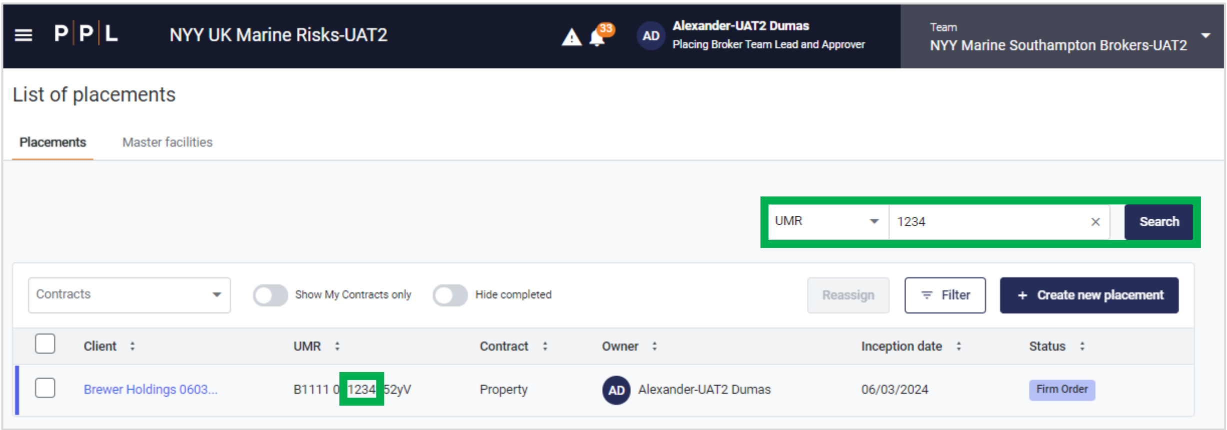
3. In the **Search dropdown** menu, select the required option.



4. In the search field, enter the required criteria. This can include part of a Client's name, characters from the UMR etc.

   Note: The search criteria must contain at least 2 characters and a maximum of 50 characters.

5. Select **Search**.



6. The search results will be displayed.

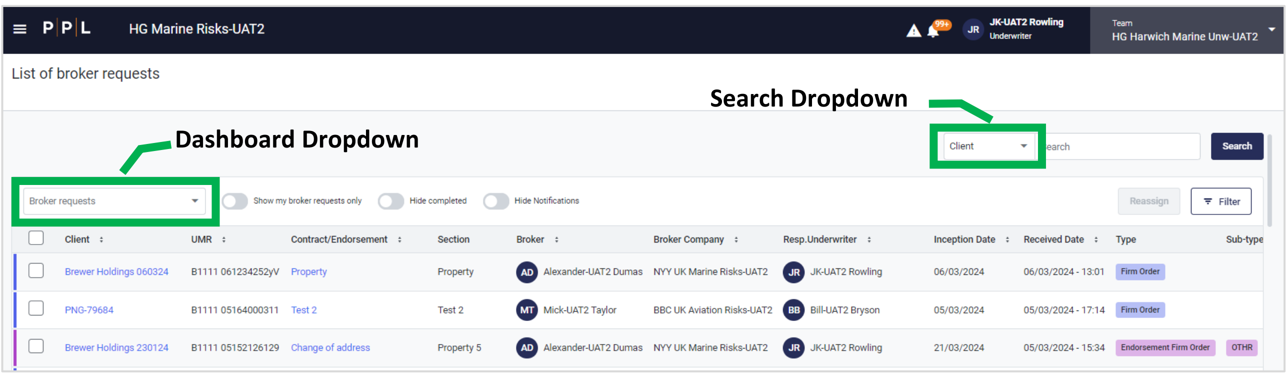
   Note: When switching between teams, any search criteria set will be applied to the new team.

7. When required, select **X** in the Search field to remove the search and reset the List of Placements.

Underwriters

1. If you have access to multiple teams, at the top-right of the screen select the required **Team**.

2. On the **List of Broker Requests**, select either Broker requests or Approval requests from the **Dashboard dropdown** menu.

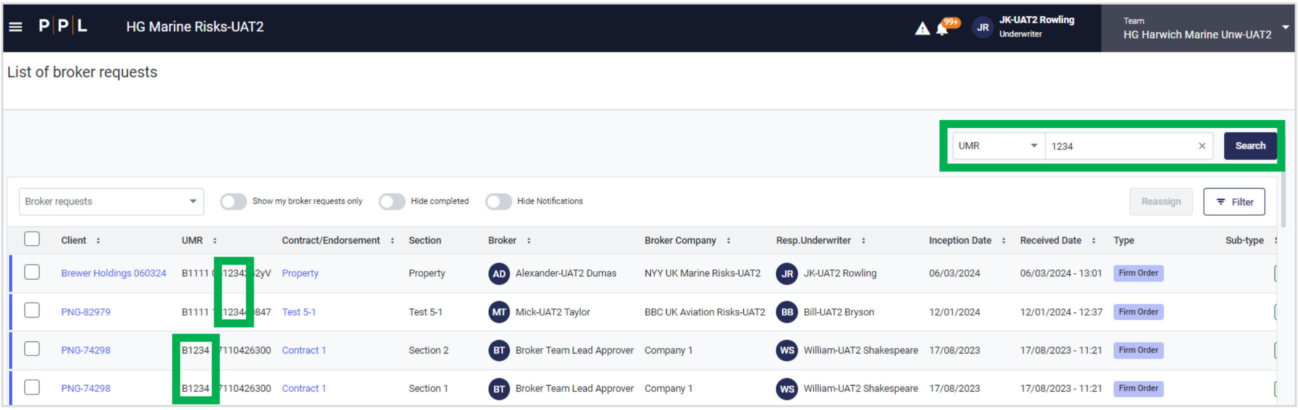


3. In the **Search dropdown** menu, select the required option (Client, UMR or Contract/Endt).

4. In the search field, enter the required criteria. This can include part of a Client's name, characters from the UMR etc.

   Note: The search criteria must contain at least 2 characters and a maximum of 50 characters.

5. Select **Search**.



6. The search results will be displayed.

   Note: When switching between teams, any search criteria set will be applied to the new team.

7. When required, select **X** in the Search field to remove the search and reset the List of Placements.

Brokers and Underwriters – Visibility of Ellipsis Menus and Check Boxes

The ellipsis menus on the Documents tab and Placement nodes on the Structure tab will now remain visible, instead of only appearing when hovering over them.

Also, all check boxes throughout the platform now have a darker border.

These changes are designed to make these items more visible.

Brokers and Underwriters – Links in Email Notifications

All email notifications sent by PPL Next Gen will now contain a hyperlink back to the corresponding area of the platform, if you already have an active session in the platform. Otherwise, you'll be taken to the login screen and then to your dashboard.

Note: Initially, the links will take you to the Notifications screen from where you can select the relevant notification to open the item. In future, the links will go directly to the work to be completed or reviewed.

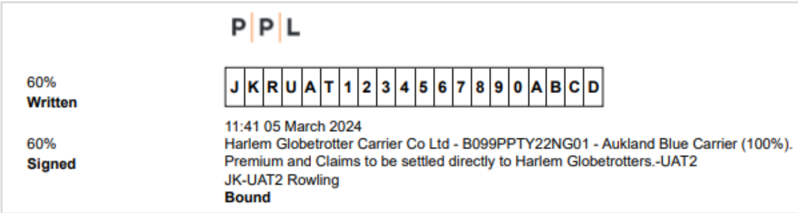
Brokers and Underwriters – Default Contact on Master Facilities or Declarations

Setting two Underwriter's participations on a Master Facility or Declaration with the same default contact, or reassigning two Underwriter's participations to the same Underwriter previously created **dual participations**.

As this is something that should not be allowed, the platform has been adjusted so that these scenarios are prevented from happening. The Broker or Underwriter will therefore receive an error message as appropriate.

Brokers and Underwriters – Increase in Line Reference Length for Graphical Stamps

When Underwriters add line references of up to 20 characters, all 20 will be visible when generating the security documents with graphical stamps. Previously, the maximum number of characters visible when using graphical stamps was 17.



Brokers and Underwriters – Endorsements - Promoted Agreement Parties in Generated Documents

Endorsement Leaders have the ability to promote the Agreement Parties selected by the Broker (e.g. from 'Leader Only' to 'All Agreement Parties') as required. The amended Agreement Parties will now be included in any generated MRCe and security details documents, ensuring that the parties shown in the documents are correct.

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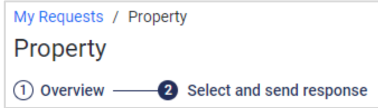
Underwriters – Navigation Steps

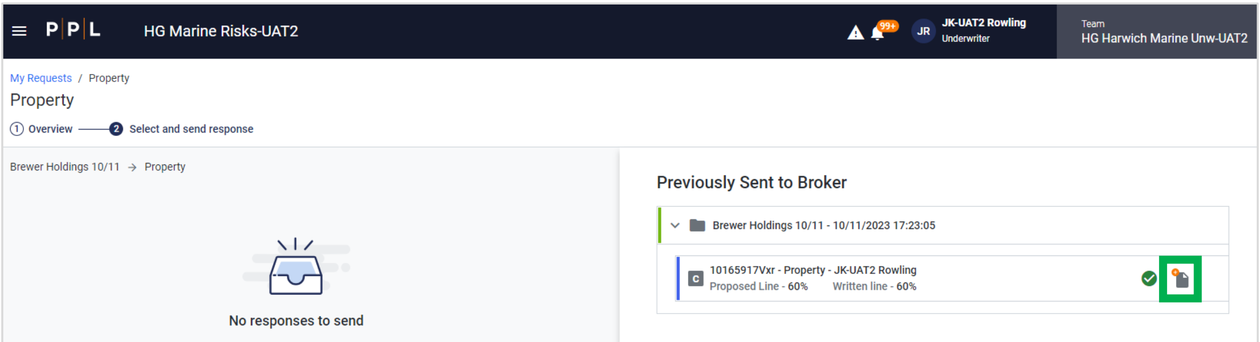
To aid navigation in the platform, the **Overview** and **Select and send response** tabs now display numbers which highlight when selected.



Underwriters – Generate Firm Order Doc

Underwriters can now generate the Firm Order document from an icon on the Select and send response screen.

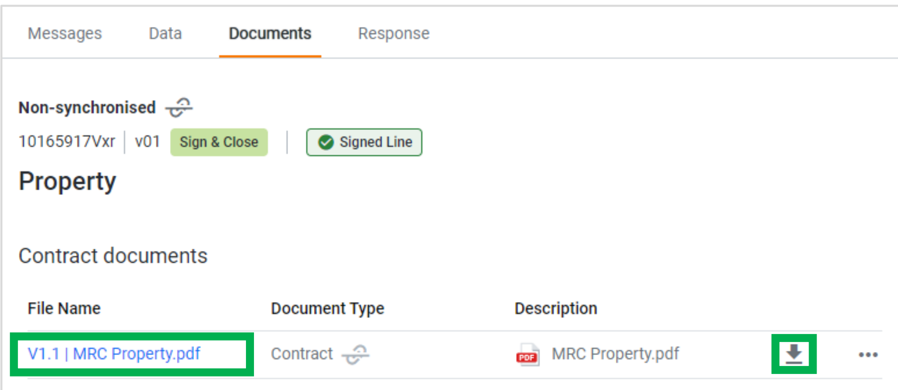
1. Open the placement and select the **Select and send response** tab.
2. On the right of the screen, the items that have been previously sent to the Broker will display the **Generate Firm Order Doc** icon



3. Select the icon and complete the **Generate Document** screen as normal.

Underwriters – View and Download Document Options

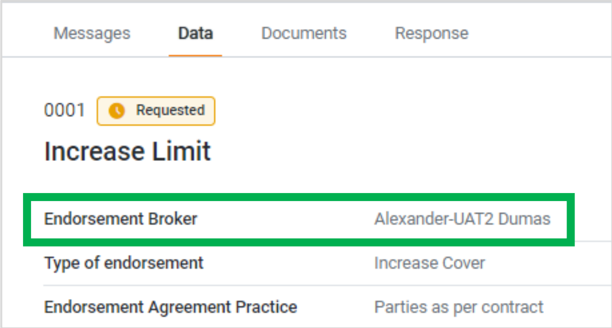
1. On the Overview tab, select the required contract, section or endorsement.
2. On the right of the screen, select the **Documents** tab.
3. To **view** the document, select the document's **File Name**. The document will open in the document viewer.
4. To **download** the document, select the download icon. The document will now be in your Downloads folder in Windows Explorer.



Underwriters – Display Broker Responsible for Endorsements

Underwriters can now see the name of the Broker responsible for an endorsement and ensure that responses for that endorsement are sent to them. This will be displayed on the List of Broker requests in the **Broker** column, in the endorsement data and in the transaction log.

1. From the List of Broker requests or Notifications, select the required endorsement.
2. With the endorsement selected on the Overview tab, select the **Data** tab on the right of the screen.
3. The **Endorsement Broker** will be shown at the top of the data.



Note: All the email notification emails related to the endorsement will be sent to the named Endorsement Broker.

Underwriters – Un-Decline a Contractual Role on a Declaration

When an Underwriter has received a declaration on a Master Facility and has declined the suggested contractual role, the Underwriter has the ability to un-decline it if required e.g. if the Broker rejects the role declinature.

The Underwriter can uncheck the **Decline role** checkbox then send their response to the Boker.

If the deleted stamp has been added back, the proportion of the total written lines is adjusted according to the original proportion.