BROKERS

PREPARING FOR RENEWALS IN PPL

The graphic below highlights the things to consider in preparation for renewing contracts in PPL.

1. Stamps

Check that your stamp connections, teams and organisation configuration are up to date.

2. Finding Items

Use the tools available to find the risks to renew. These include Search, Sort, Filters and the Hide Completed toggle.

3. Team Working

You can work on items from the Team view or Team Mailbox if you have one set up. You can also Reassign items to yourself or others to work on.

4. Notifications

Use the Bell icon to display all your Notifications (every notification has a corresponding email). These can be filtered or clicked to access the subject of the notification.

5. Documents

Use the options for viewing and downloading documents, or generate the firm order documents.

6. Cloning Contracts

Clone last year's contract to create a copy of the contract and sections if required. Use the Pool tab to reselect last year's Underwriters as required. (Also available in Express Contract).

7. Selecting Stamps

Select the Permitted Territory and propose the stamps and written lines for your Underwriters.

8. Using Sections

Enter the basic data and MRC then create sections in the contract as required. Use features such as Copy Panel where the Underwriters on sections are similar.

9. Links in Emails

When receiving notification emails from Underwriters, click the included link to access the appropriate item in PPL.

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