

Contents

Brokers – New Currency Field Search	2
Brokers – Improved Process for Manually Editing or Excluding Lines in Declarations	2
Brokers – Generated MRCE Now Shows the Lead and Accepting Underwriter Who Responded	3
Brokers – Improved Process for Creating Endorsements with Off-Platform Leaders	4
Brokers – Updated Warning Message When Cancelling a Contract with an ‘In Progress’ Endorsement.....	4
Brokers and Underwriters – Security Details to Display Conditional Acceptances as ‘Pending’	5
Brokers and Underwriters – Accepting Underwriter Appearing on Generated Documents	5
Brokers and Underwriters – ‘Default Contact’ for Declarations Changed to ‘Declaration Contact’	5
Underwriters – Firm Order and Correction Security Details Documents Now Attached to Confirmation Emails	6
Underwriters – Generated MRCE Showing Lead and Accepting Underwriter	6
Underwriters – Followers to Receive Endorsement Email Notifications with MRCE Attached	7
Underwriters – Endorsement Security Details Documents Attached in Confirmation Emails.....	7
Underwriters – Agreement Parties - Generated MRCE Shows Leader and Their Agreement Only	7

This document highlights the key new and improved features available in the June 2024 release.

Brokers – New Currency Field Search

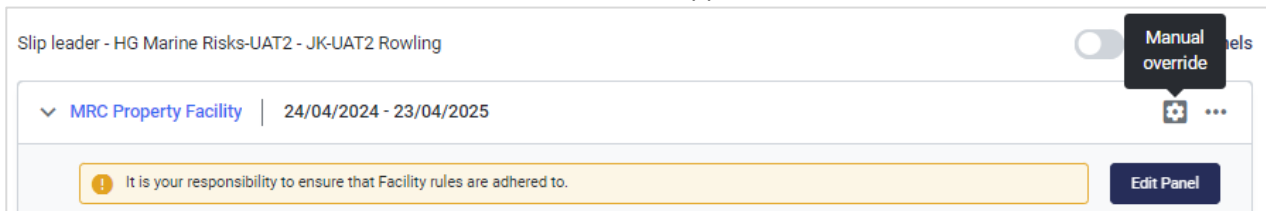
A search field is now available at the top of all Currency drop-down lists, when entering limits, excesses, deductibles, premiums, monetary lines, and endorsements.

This will enable Brokers to find the required currencies faster.

Brokers – Improved Process for Manually Editing or Excluding Lines in Declarations

When creating declarations using master facilities, Brokers may wish to manually adjust lines or exclude them from the declaration. The process for doing this has been improved to reduce the time required for Brokers to complete it.

1. Create the declaration and on the right of the screen select the **Underwriters** tab.
2. Select **Add Underwriter**.
3. In the Add Underwriter screen select the **Facilities** tab and select the required facility.
4. Select **Add**.
5. On the Underwriters tab, enter the **Panel proposed line**. Selecting another field will calculate the proposed lines for each Underwriter on the facility.
6. To **Exclude** an Underwriter, select the toggle on their line **Exclude** . When selected, the toggle will be green. **Note:** This can also be done from the **Edit Panel** screen, as shown in point 9 below.
7. To make manual adjustments to the lines, at the top right of the facility panel, select the ellipsis menu and choose **Manual override**. The Manual Override icon will appear:



8. Select **Edit Panel**

9. In the screen that appears, as changes are made to the proposed lines the fields at the top of the screen will indicate how the **Panel proposed line** and **Total Underwriter proposed line** have been affected.

Note: If the Panel and Total Underwriter proposed lines don't match, the **Confirm** button will be unavailable, as shown on the right.

10. Once you have made all your required changes, select **Confirm**.

The screenshot shows a window titled "MRC Property Facility" with a close button (X) in the top right. Below the title, it says "Fill the Panel information:". There are two input fields: "Panel proposed line" with the value "100" and "Total Underwriter proposed line" with the value "95". Below these fields, red text indicates "Panel proposed line is +5" and "Underwriters proposed line is -5".

Below this, there is a table of underwriters with their proposed lines. The table has columns for "Underwriter", "Proposed line", and "Exclude". The "Proposed line" column has input fields with values 40, 30, and 25. The "Exclude" column has checkboxes. The "Proposed line" column is highlighted with a green box.

Underwriter	Proposed line	Exclude
JR JK-UAT2 Rowling - HG Marine Risks-UAT2	40 %	<input type="checkbox"/> Exclude
CD Charles-UAT2 Dickens - B Property Risks-UAT2	30 %	<input type="checkbox"/> Exclude
MO Michelle-UAT2 Obama - BH UK Property Risks-UAT2	25 %	<input type="checkbox"/> Exclude

At the bottom, there is a message "Please select Confirm to proceed" and two buttons: "Cancel" and "Confirm".

Note: To reset the Panel lines, select the ellipsis menu and choose **Automatic calculation**.

Brokers – Generated MRCE Now Shows the Lead and Accepting Underwriter Who Responded

When generating the MRCE with Agreement Parties, the document will always show the details of all the participating Underwriters who responded to the endorsement, even after the endorsement has been reassigned.

Where an endorsement request is reassigned before the endorsement has been responded to, the agreement details of the Underwriter who responds to the request will be shown on the documentation.

The Underwriters' responses will show as:

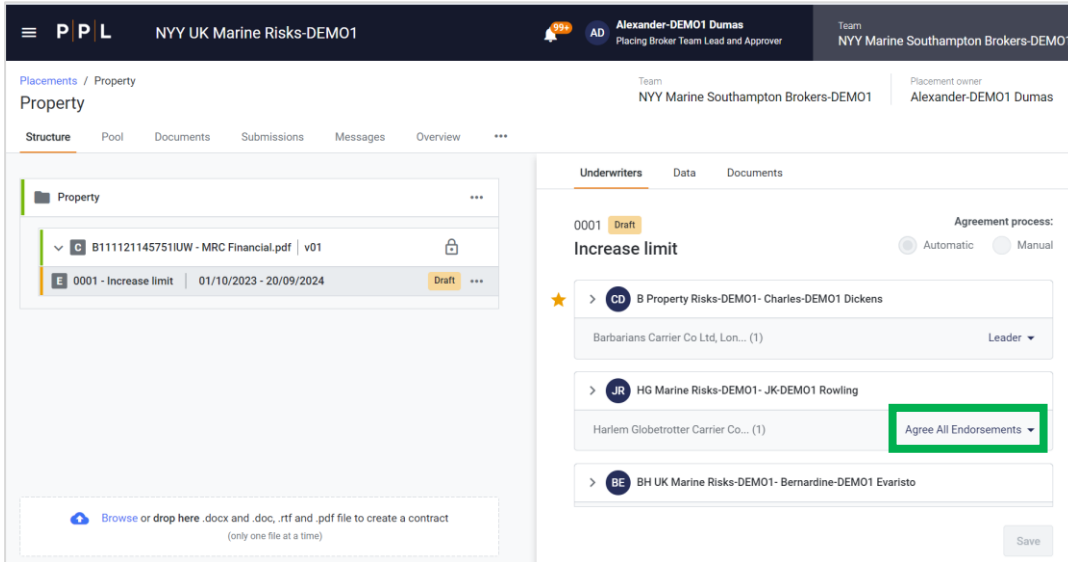
- **Agreed** where an Underwriter has accepted the endorsement.
- **Bound** where the Leader has accepted the endorsement on behalf of an Underwriter.
- **Rejected** where an Underwriter has rejected the endorsement.
- **Pending** where an Underwriter hasn't yet responded.

This ensures that the endorsement document shows the appropriate Underwriters' responses at the time of generation.

Brokers – Improved Process for Creating Endorsements with Off-Platform Leaders

When creating an endorsement where the Leader is not on PPL (off-platform), the **+ Add Endorsement Response** option will now be disabled until:

- The Contract endorsement document has been added, and
- All Underwriters listed have an endorsement role assigned, as shown below



A warning message will appear as necessary.

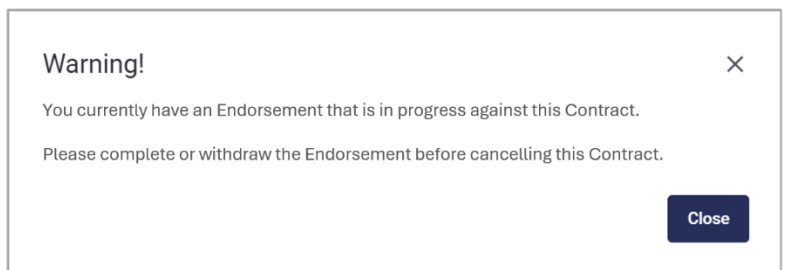
This ensures that the endorsement cannot reach the 'In Progress' status and become locked before the requirements have been completed.

Note: This change doesn't apply to mid-term market change (MTMC) endorsements.

Brokers – Updated Warning Message When Cancelling a Contract with an 'In Progress' Endorsement

An updated message will now appear as shown on the right when a Broker is attempting to cancel a contract that has an endorsement on it that is still 'In Progress'.

This makes the next action clearer for the Broker.



Brokers and Underwriters – Security Details to Display Conditional Acceptances as ‘Pending’

If Brokers or Underwriters choose to generate the security details documents when an Underwriter has made a conditional acceptance, the Underwriter’s line will be displayed with a status of **‘Pending’**.

On graphical stamps, a ‘PENDING’ watermark will also appear across the stamp.

This will happen prior to the condition(s) being accepted by the Broker and the line therefore becoming bound.

This will ensure the documentation contains the latest status of the line at the time of generation.

Brokers and Underwriters – Accepting Underwriter Appearing on Generated Documents

When an Underwriter responds to a firm order or endorsement request, the name of the responding Underwriter will be reflected in the security details along with that of the Responsible Underwriter at the time of sending the response.

For example:

If Underwriter A is the Responsible Underwriter on a firm order, and Underwriter B is the one who actually responds to the Broker (whether it’s an acceptance or a conditional acceptance), the generated security documents will show **‘Underwriter B on behalf of Underwriter A’**.

The same applies to the security documents for endorsements, where Underwriter B is the one who responds to the Broker with an acceptance or rejection of the endorsement.

The screenshot shows a document titled "SECURITY DETAILS". Under "REFERENCES", it lists "UMR (Unique Market Reference): B111108122751730" and "Date contract printed to PDF: 09:57 12 June 2024". The "SIGNED UNDERWRITERS" section shows "HG Marine Risks-UAT2" as the "Slip Leader". A graphical stamp is present, featuring the P|P|L logo, a signature "i u 9 8 7 5 8 7 5 g", and a date "09:57 12 June 2024". The stamp also includes the text: "Lloyds Underwriter Syndicate No. 4321 HGL, London, England-UAT2", "Bill-UAT2 Bryson on behalf of JK-UAT2 Rowling", and "Bound as Lloyd's Leader".

This ensures that the name of the person agreeing the firm order or endorsement will appear when either the Broker or Underwriter generates the security documents.

Brokers and Underwriters – ‘Default Contact’ for Declarations Changed to ‘Declaration Contact’

The ‘Default Contact’ field in Declaration and Master Facility contracts has been changed to:

- **Declaration contact** in declaration contracts. This is found in:
 - (Broker screens) Structure – Underwriters tab, then the Underwriter’s card.
 - (Broker screens) Off-Platform Response screen.
- **Default Declaration contact** in Master Facility contracts. This is found in:
 - (Broker screens) Structure – Underwriters tab, then the Underwriter’s card.
 - (Broker screens) Off-Platform Response screen.
 - (Underwriter screens) Underwriter Response screen.
 - (Underwriter screens) Select and Send Response screen.

Underwriters – Firm Order and Correction Security Details Documents Now Attached to Confirmation Emails

When an Underwriter accepts a firm order or correction request, the firm order document (MRC + Security Details) will be attached as a PDF to the confirmation email sent to theirs and their team’s mailbox (if applicable).

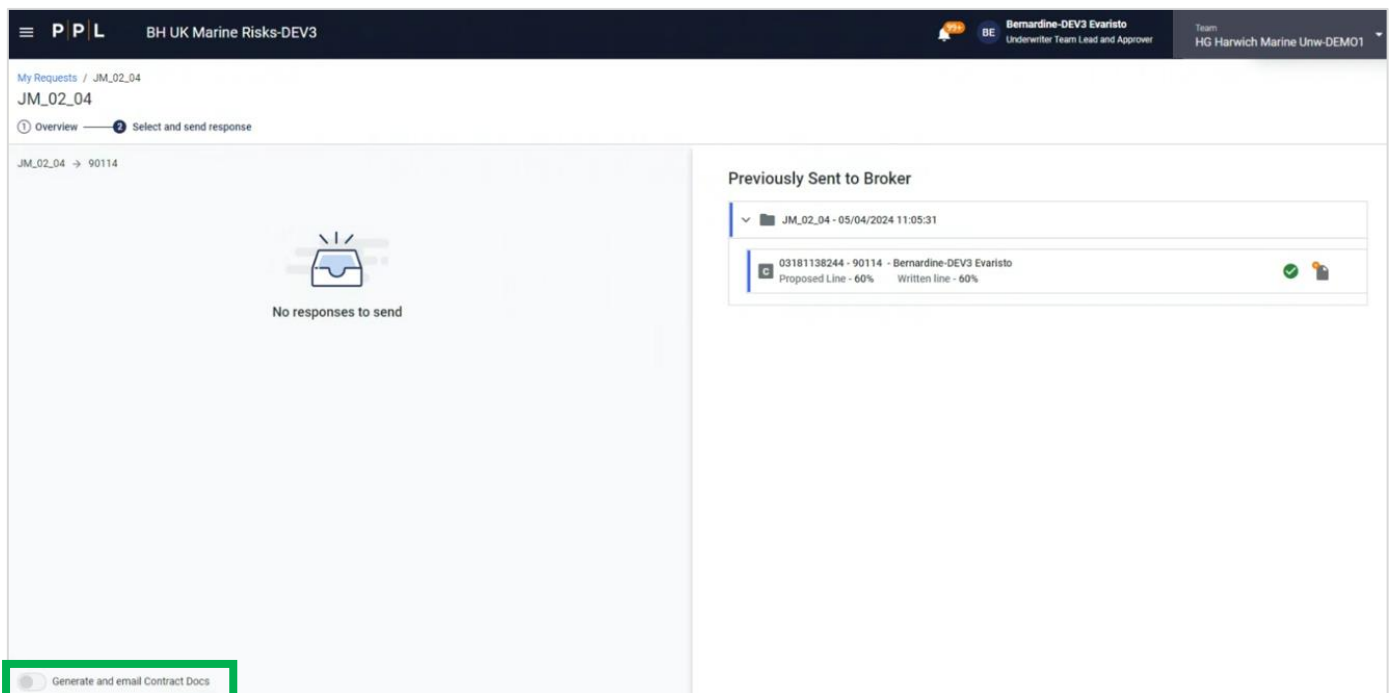
This enables Underwriters to have the MRC + Security Details available in their mailbox without needing to step back into PPL to download it.

1. On the **Select and Send Response** tab, select the response(s) to be sent to the Broker.
2. At the bottom of the screen, select the **Generate and email contract docs** toggle.

Note: The toggle settings will be based on the Underwriter’s saved preferences for generation of the MRC + Security Details e.g. graphical stamps, page numbering etc.

3. Select **Send Response**.

The Underwriter will be sent the confirmation email containing the PDF of the MRC + Security Details. The team email address of the accepting Underwriter will be included in the **CC** field.



Note: Off-platform Underwriters don’t receive notifications from the platform.

Underwriters – Generated MRCE Showing Lead and Accepting Underwriter

When generating the MRCE + Agreement Parties, the document will always show the details of the Leader and the Underwriter who responded to the endorsement, even after the endorsement has been reassigned.

Where an endorsement request is reassigned before the endorsement has been responded to, the agreement details of the Underwriter who responds to the request will be shown on the documentation.

This ensures that the endorsement document shows the appropriate Underwriters at the time of agreement.

Underwriters – Followers to Receive Endorsement Email Notifications with MRCE Attached

If you are set up to receive notifications as a follower on an endorsement, you will receive an email with the MRCE attached as a PDF. The MRCE will display the agreement details of the Leader and the other agreement parties.

This also applies when the Agreement Parties are set to **Leader Only**.

The email will not be sent to Underwriters with a role of Follower – Notification Not Required.

Note: Off-platform Underwriters don't receive notifications from the platform.

Underwriters – Endorsement Security Details Documents Attached in Confirmation Emails

When an Underwriter accepts an endorsement, a PDF of the generated MRCE + Security Details document will be emailed to them showing the agreement details of the Leader and themselves.

This enables Underwriters to have the MRCE + Security Details available in their mailbox without needing to step back into PPL to download it.

Note: Off-platform Underwriters don't receive notifications from the platform.

Underwriters – Agreement Parties - Generated MRCE Shows Leader and Their Agreement Only

When an Underwriter generates an MRCE + agreement parties document, it only shows the agreement details of the Leader and the Underwriter in their organisation who accepted the endorsement. The agreement details of the other Underwriters will not be displayed.