P P L PLACING PLATFORM LIMITED

Renewals - Useful Features - Brokers

Contents

Archive Placements Process	3
Delete Multiple Records in the Archive	3
Broker of Record (BoR) Tool	4
Hide Completed Items	4
Filter	5
Dashboard Search (List of Placements)	5
Sorting	6
Team Working	6
Reassigning Items	6
Team View	6
Using the Notifications Screen	7
View and Download Document Options	8
Generate Firm Order Document	8
Cloning	9
Stamp Selection	11
Creating Contracts with Sections	11
Sections – Copy Panel	11
Mandatory Fields Highlighted	12
Fields to Not Pre-Populate	12
Links in email Notifications	13



PREPARING FOR RENEWALS The Importance of Your Org Config

1. ONBOARDING FORMS

• NEW STAMPS

2. SUPPORTING DOCUMENTS

We can provide you with guides on the following processes:

- New Stamp Guidelines
- How to Add New Stamps
- Broker Connections to New Stamps
- $^{\circ}$ Assistance for New Users e.g. Logging In

3. ORG CONFIG HOUSEKEEPING

Check in your Org Config that the following information is correct:

- USER ROLES
- STAMP ACCESS
- TEAM ACCESS

4. OTHER USEFUL INFORMATION

Ask us if you need more information on the following:

- $\,\circ\,$ Information needed when creating Support tickets
- Stamp requests (New or Amendments) must come
- from the Carrier What Service Requests require an
- What Service Requests require approval from your Org, and who the Approval Contacts are
- How to access the PPL Learning platform



5. PPL CONTACTS

- Contact the following if you need more assistance:
- SUPPORT support@ppInextgen.com
- TRAINING training@ppInextgen.com
- RELATIONSHIP MANAGER
- · PPL ENQUIRIES pplenquiries@placingplatformlimited.com

Archive Placements Process

Ρ

PLACING PLATFORM

Contracts that are due for renewal that were placed using the old version of PPL may not have been loaded into the archive and subsequently promoted into the current version yet.

To do this, use the Archive Placements process to load and promote multiple contracts. A 15 minute video is available in the PPL Learning platform which steps through this:

Archive Placement		Territor () Territor ()
Process	P. 00.000	Network
FIOCESS	1.00.002	Technol
	1903	infrance.
	2-99202	Serional
	2100202	httpps:/
		nemonal
		Termine
		in Trapent
	<i>.</i>	

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:

≡ PPL	NYY UK Marine Risks-UAT2		Alexander- Placing Brok	UAT2 Dumas er Team Lead and Approver	Team NYY Marine Southampton Brokers-UAT2	
Archived Place	nents					
Archive						
				Client 👻 S	Search	1
Archive Placement	Show My Archive Placements only Hide completed			2 selected	Delete Reassign Filter	
Client ÷	Placement ÷	Effective year 💲	Owner ÷	Contract inception	÷ Status ÷	
Testing Ac	Ident and Testing Accident and Health 2022	2022	RD Roald-UAT2 Dahl	01/08/2023	In Progress •••	
Testing Na	ural cata Testing Natural catastrophes 2022	2022	IB Iain-UAT2 Banks	21/10/2022	Not Started ***	

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**.

Delete Archived Placements	×
Do you want to delete the following Archived Placements?	
Testing Accident and Health 2022 Testing Natural catastrophes 2022	
This action is non-reversible. All data will be lost including any attached door	cuments.
Cancel	Delete

The archive placements will now be deleted.



Individual contracts placed using the old version of PPL can also be added using the backloaded placements process, a video and guide for which are available in PPL Learning:

Bitesize Session Recording Backloaded Placements Process	Normal International Internati		=1	Backloaded
Proker Training	1.0.00			Guide for
broker fraining	1.0000	ansat .		Drokoro
	12102	Margaret .		Brokers
	12.11.000	and the second sec	 	
	14.10.00	interest.		
25 min video	2010/02	No. On Concession of Concessio		10
		1.00 million (0 1 1 1		10

= Broker Bitesize Sessions
Activities
Broker Bitesize Sessions - Creating New Placements
 Broker Bitesize Sessions - Negotiating, Signing & Closing
 Broker Bitesize Sessions - Corrections Processing
Broker Bitesize Sessions - Creating Facilities
Broker Bitesize Sessions - Vertical/Bipar Placements (Subpanels)
Broker Bitesize Sessions - Backloaded Placements

Note: When viewing the Bitesize session recordings, you may need to select the menu at the top-left and choose the required video:

10 min read

Broker of Record (BoR) Tool

The BoR tool may be an option if you need to bring in multi-sectioned contracts that were previously placed elsewhere, or for placements containing up to five contracts.

A guide explaining the BoR process is available in PPL Learning.



Hide Completed Items

Brokers can show or hide completed items from their list of placements by using the toggle button shown below:

Completed items shown - Hide completed Completed items hidden - Hide completed

This is available to use with all items other than approval requests. This and the **Show My Placements only** toggle will remember your preference when you next log in.

Filter

Ρ

- 1. On the List of placements screen, select the Filter button.
- 2. Select the required criteria e.g. Effective Year, Inception date etc.
- 3. Select Save.

To clear all your filters, select the Filter button and then select Reset.

Dashboard Search (List of Placements)

PLACING PLATFORM LIMITED

On the List of Placements, there is a search field enabling users to search structured data related to placements e.g. placements, programmes, contracts, endorsements, approval requests etc.

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

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

- 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.

≡ P		Y UK Marine Risks-UAT2		Alexander-UAT2 D Placing Broker Team	Dumas Lead and Approver	Team NYY Marine Southampton Brokers	s-UAT2
List of	placements						
Placeme	Master faci	ities	54	earch Drondown			
Dashboard Dropdown							earch
Place	ements	Show My Placements only	Hide completed		Reassign	≂ Filter + Create new placem	ent
	Client ‡	Placement ÷	Effective year \$	Owner ÷	Contract incept	ion ÷ Status ÷	
	Brewer Holdings	Property Sub Panels #1	2023	EH Ernest-UAT2 Hemingway	25/09/2023	Complete	
	Brewer Holdings	Property	2023	AD Alexander-UAT2 Dumas	02/11/2023	Not Started	

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

$\equiv \mathbf{P} \mathbf{P} \mathbf{L}$ NYY UK Marine Risks-UAT2		A Placing Broker Tee	2 Dumas Im Lead and Approver	Team NYY Marine	e Southampton Brokers-UAT2
List of placements					
Placements Master facilities					
			UMR 🔺	Search	Search
			UMR		
Contracts Show My Contracts only	Hide completed		Client	. 〒 Filter	+ Create new placement
Client ÷ UMR ÷	Contract ÷	Owner ÷	Contract	ption date 💲	Status ÷
Brewer Holdings 2301 B1111 05121634138	Property 4	AD Alexander-UAT2	Dumas 21/	03/2024	Sign & Close
Brewer Holdings 2301 B1111 05152126129	Property 5	AD Alexander-UAT2	Dumas 21/	03/2024	Sign & Close

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.

≡ PPL N	YY UK Marine Risks-UAT2	A	AD Alexander-UAT2 Durr Placing Broker Team Lear	as d and Approver	Team NYY Marine	e Southampton Brokers-UAT2
List of placements						
Placements Master fac	ilities					
			UM	R ▼ 1	1234	× Search
Contracts	Show My Contracts only	Hide completed		Reassign		+ Create new placement
Client ÷	UMR ÷	Contract ‡	Owner ÷	Incepti	on date 💲	Status ÷
Brewer Holdings (0603 B1111 0 1234 52yV	Property	AD Alexander-UAT2 Dumas	06/03/	2024	Firm Order

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.

Sorting

Select the column headings containing up/down arrows to sort the data by that column. Selecting the column heading again will change the sort direction.

Contract inception	*	Status	ŧ
22/04/2024		In Progr	ess

Filters, the type of items being displayed, or approval requests are also all 'sticky'. This means that your selections will remain if you navigate away from the screen, or log out and back into PPL.

Note: The options mentioned above are applied at user, rather than team level.

Team Working

Reassigning Items

A guide explaining the reassigning process is available in PPL Learning.

,	 Annota retrieve Annota retrieve 	anne BYT Mathe Institution for the server
		na a min D a Indonesianan
Demosioning An Item	Cafest comprising it	a to the t
Reassigning An Item	1.000	an avail
	1.0.07	(Street)
Broker Training	14 10 100	on local
broker fraining	14.000.000	Internet.
	0.000	tor level
	4.000	Inchesed
a sector of the s	****	(charm)
i min video	2.100	Inchesed
		1420-02100 C 🔘 1

Team View

Use the toggle on the List of placements screen to switch between seeing all the items relating to the currently selected team (Show My Placements only), or just those where you are the owner or that have been reassigned to you (Show My Placements only).

Using the Notifications Screen

Ρ

All transactions between Brokers and Underwriters generate both an email to the relevant individual or team email address, and a notification in PPL. The Notifications screen is therefore a great resource for viewing all the activity between you and all your Underwriters.

- 1. Select the Notifications icon 🗳 at the top of the screen. The number indicates unread notifications.
- 2. The list will initially display all unread notifications, with the most recent notification at the top of the screen. The following information and options are available:

≡ P P L	NYY UK Marine Risks-DE	M01	AD Alexander-DEMO1 Dumas Placing Broker Team Lead and Approver	Team NYY Marine Southampton Brokers-DEMO1
Notifications	Select all 🚺 Hide r	read	0 selected 🖀 Delete	Mark as read Filter 🔘 …
All Additional Info	• 🗊 🗌	B Property Risks-DEMO1 - Charles-DEMO1 Dickens Brewer Holdings - Property	Accepte	22/04/24 - 12:12 d S Firm Order
Asynchronous	• 📴 🗌	BH UK Marine Risks-DEMO1 - Bernardine-DEMO1 Evaristo Brewer Holdings - Property	Accepte	22/04/24 - 12:11
Draft	• 🗷 🗌	HG Marine Risks-DEM01 - JK-DEM01 Rowling Brewer Holdings - Property	Accepte	22/04/24 - 09:52
Endorsement Facility	• 🗷 🗌	HG Marine Risks-DEM01 - JK-DEM01 Rowling 10/04 Placement - Property	Updat	10/04/24 - 17:38 e 🚯 Sign & Close
Firm Order MI Report	• (3)	Subjectivity Satisfied 10/04 Placement - Property Survey report required	Subjectivity Satisfie	10/04/24 - 17:38
Misc Not Taken Up	• 🐽 🗌	BH UK Marine Risks-DEMO1 - Michelle-DEMO1 Obama 10/04 Placement - Property	Conditionally Accepte	10/04/24 - 17:15
Quote Sign & Close	• 🚥 🗌	B Property Risks-DEMO1 - Charles-DEMO1 Dickens 10/04 Placement - Property	Accepte	10/04/24 - 17:14
	• 🗷 🗌	HG Marine Risks-DEMO1 - JK-DEMO1 Rowling 10/04 Placement - Property	Conditionally Accepte	10/04/24 - 17:13
	• 🖻 🗌	MI Notification S&C Report - Matt	Ready for Downloa	08/04/24 - 12:31 d 1 MI Report
	• 🖽 🗌	NYY UK Marine Risks-DEMO1 - Ted-DEMO1 Hughes MC test - MC contract	Reassigne	28/03/24 - 14:17 d 👔 Reassign
		BH UK Marine Risks-DEMO1 - Bernardine-DEMO1 Evaristo		25/03/24 - 08:59
	1 to 20 of 176 items			

- Use the toggle to view previously read notifications
- Use the notification category list at the left of the screen to show just endorsements, firm orders etc.
- The 2nd column shows icons indicating the initials of the person * 🛡 or automated messages * 🔍
- Use the check boxes in the 3rd column to select notifications for deleting or marking as read.
- The 4th column shows the details of the notification.
- The 5th column shows the notification type e.g. $\overset{\text{Accepted}}{\bigcirc}$, $\overset{\text{Rejected}}{\bigcirc}$ etc.
- The final column shows the date, time and category of the notification.
- 3. You can also select Filter to narrow the list down. The number on the Filter button indicates how many filters are currently active. You can filter by:
 - Category e.g. Endorsement, Firm Order, Not Taken Up
 - Action e.g. Accepted, Bound, Published
 - Created from and Created to dates.
- 4. Click anywhere on the notification (except the checkbox) to open the item the notification refers to.



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.

Underwriters	Data	Documents				
7678 kk2789hhi Primary Cai	nje v01 r go Lay e	Sign & Close				
Contract docu	ments					
File Name		Document Type	De	scription		
-Dummy Contrac	t Document	.docx Contract උ		MRC	<u>+</u>	•••

Generate Firm Order Document

Brokers can generate the firm order document from the Overview tab, once the contract has been signed and closed:

- 1. Select the **Overview** tab.
- 2. At the right of the screen, select the ellipsis menu for the contract and select Generate Firm Order Doc

= P P L NYY UK Marine Risks-UAT2		A 🖗 🧧	Alexander-UAT2 Dumas Placing Broker Team Lead and Approve	r NYY M	larine Southampton Brokers-UAT2
Placements / Property Property Structure Pool Documents Submissions Messages Overview •••			Team NYY Marine Southampt	ton Brokers-UAT2	Placement owner Alexander-UAT2 Dumas
Property Complete					
	Status	Quoted	Proposed Wri	itten line	Signed line
✓	Sign & Close	*	110% 110	0%	100%
😊 B Property Risks-UAT2 - Charles-UAT2 Dickens ★ 🕉	Signed Line	ā.	60% 60%		Sign and close Generate Firm Order Doc
📵 🛛 BH UK Marine Risks-UAT2 - Bernardine-UAT2 Evaristo 🕉	Signed Line	*	50% 501		45.4545%

- 3. Select the **Contract Type** to be generated:
 - MRC + Security Details listed by carrier.
 - MRC + Security Details listed by section.
 - Security Details Only.
- 4. Make your other selections as required and select **Download**.
 - **Note**: You can now select to show one Underwriter per page.
- A clickable confirmation of the download will appear and the file will also be available in your Downloads folder.

MRC + Security Details - listed by carrier	•	
Include Endorsements? 😑		
Yes 💿 No		
Security Details Display 👴	Security Det	tails Page Numbering
Show graphical Show textual	🖲 On	Off
Security Details Page Break 🕚		
Continuous One Per Page		

Cloning

Ρ

You can clone a Placement or a Contract on the Structure tab by selecting the ellipsis menu for the appropriate item and selecting **Clone Placement** or **Clone Contract**.

inter a	ime i
fafarorecioquin +	inse i
1 North	to and
1.0.07	array a
1.000	tor install
in money	arteres.
4.000	to herei
4.000	inchesed.
****	(share)
2010/0000	Reflected
(0 mm 4 mm 9 mm 2 mm

<u>Note:</u> for Renewals, it's recommended that you use the **Clone Placement** option, as this enables you to clone all the contracts within it and apply a new **Placement Effective Year**.

The Underwriters on the cloned contracts and sections don't get copied over to the new contracts and sections, but you can make them available for selection without having to search for them again, as explained below.

If you are cloning the whole placement:

- 1. Select the ellipsis menu for the placement and select **Clone Placement**.
- On the Clone Placement screen, enter a Placement Description and on the Placement Structure tab, select the items in the structure that you wish to clone. All are selected by default.
- On the Underwriter Pool tab, select the Underwriters that you want to be available for quick reselection from the Pool tab when adding the renewal Underwriters to the cloned contract.
- 4. Select **Clone**. The cloned placement will then appear.

All Contracts within the cloned Placement will be creat	ed with an automatically generated Contract Reference. Ple	ease ensure these are updat
lacement Description		
Property Terrorism 2024		
Placement Structure Underwriter Pool		
Underwriter	Company	
JR JK-DEM01 Rowling	HG Marine Risks-DEMO1	
BE Bernardine-DEMO1 Evaristo	BH UK Marine Risks-DEMO1	
Toni-DEM01 Morrison	ABC Property Risks-DEMO1	

In the new placement, select the contract then select the Underwriters tab.
 Select + Add Underwriter and on the Pool tab choose which of the expiring contract's Underwriters to include.

6. Select Add.

Ρ

7. Enter the Underwriters' proposed lines, and update the Data and Documents as required. Submit to Underwriters when ready.

If you are cloning a contract but not the whole placement:

PLACING PLATFORM LIMITED

- 1. Select the ellipsis menu for the contract and select **Clone Contract**.
- 2. On the Clone Contract to a placement screen, in the **Contract reference** field enter or generate the contract reference.
- 3. Enter a Contract description.
- In the Contract destination field, select the placement that you want this contract to be placed in. The field defaults to the current placement.
 - **Note:** As contracts are cloned to an existing placement, it may be preferable to clone the whole placement for renewals.
- If the contract has sections, in the Contract Structure field, select the sections that you wish to clone.
- 6. Select Clone.
- In the cloned contract, on the Underwriters tab select + Add Underwriter. Find and select the required Underwriters.

Note: The **Pool** tab will contain the Underwriters who were on the contract used to create the clone.

8. Enter the Underwriters' proposed lines, and update the Data and Documents as required. Submit to Underwriters when ready.

4093043033	Generate Contract Reference
ontract description	
Property 1 2024	
ontract destination	
3/03 Sections	•
ontract Structure	
Property Multi National	
🖹 ик	
EEA - France	

PLACING PLATFORM LIMITED Renewals -

Renewals - Useful Features - Brokers

Stamp Selection

Ρ

Brokers should always select a stamp for the Lead Underwriter on a contract or section if known. Doing this gives the Lead Underwriter the full range of fields (e.g. risk codes) to enter or select from. It's recommended that the 'Underwriter to select' option is only used for following Underwriters where the required stamp is not known.



When receiving the submission, Underwriters can change the stamp selected by the Broker or select a stamp if the Broker did not select one. The full guide on stamp selection is available in PPL Learning.

Creating Contracts with Sections

When creating contracts with sections, add the **Settlement Details** and **Risk Codes** when first creating the contract. When you then add the sections, this information will be copied to each one.

Sections – Copy Panel

When creating a contract with sections, the Broker can copy the Underwriters from another section they have already created.

- 1. Add the Underwriters for the first section.
- Create the second section and if the Underwriters for the second section are the same as or similar to those on another section in the contract, select the Underwriters tab and at the bottom of the screen, select Copy Panel.

	Data Ready?	Copy Panel	+ Add Underw	riter	
3.	The list of available sections to copy from will appear above the Select the required one.	e Copy Panel	button.	υκ	Copy Panel

4. The Underwriters and their proposed lines and stamps will be copied over.



Mandatory Fields Highlighted

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

Underwriters Data Documents
Contract details
Broker team
NYY Marine Southampton Brokers-UAT2
Placing broker
Ted-UAT2 Hughes
Unique market reference
B11101145955402
* Broker code * Contract reference
1111 • 01145955402
* Contract description
Property 2

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

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 <u>not</u> 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 market reference		
unique contract reference	B0000		
number to be created,			
they can select the	* Broker code	* Contract reference	
Generate Contract	Select Broker Code 🔹		Generate Contract Reference
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.

ict Reference

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.

PLACING PLATFORM LIMITED

Ρ

- 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 enter the required one or 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.

Data	2
Enter Contract Det	tails
Contract reference and Cor generated	ntract description are auto
Broker team	
NYY Marine Southampton B	Brokers-UAT2
Placing broker	
Alexander-UAT2 Dumas	
Unique market reference B1111211502339UA	
* Broker code	* Contract reference
Select Broker Code 🛛 👻	211502339UA
	Reference auto generated
	Ŭ.
Generate Contract Reference	
Generate Contract Reference * Contract description	
Generate Contract Reference * Contract description MRC Property.pdf	

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.