Contents

PPL^{PLACING} PLATFORM LIMITED

Dashboard View – Items Received in Last 30 Days	3
Finding Items Received Over 30 Days Ago	4
Dashboard Search	4
Applying Filters	5
Save Filters on the Underwriter Dashboard	5
Delete a Saved Filter	6
Sorting	6
Date/Time Received Column	7
Hide Completed Items	7
Hide Notification Requests from Underwriter Dashboard	7
Team working for UWs	8
Team View	8
Reassigning Items	8
Links in email Notifications	8
Using the Notifications Screen	8
Icons on the Overview Tab	9
Leader's Line Displayed	10
Generate Firm Order Doc	10
View and Download Document Options	11
Stamp Selection	11
Copy Response from Other Section	11
Save & Send Response	13



PREPARING FOR RENEWALS The Importance of Your Org Config

1. ONBOARDING FORMS

These need to be completed by your organisation for the following: • NEW USERS

• 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
- 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 Corrier
- from the Carrier
 What Service Requests require approval from your
- Org, and who the Approval Contacts are
- $^{\circ}\,$ 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

From the 24th May, Underwriter dashboards will default to the following unless a filter has been saved/applied:

- Only not completed work items received in the last 30 days will be shown.
- Notifications or completed work items will not be shown.

PLACING PLATFORM LIMITED

Ρ

This change will only impact those who have no filters saved/applied. This equates to approximately 70% of all Underwriter users. A full view of notifications, completed items and older items can be accessed by either using the extensive filter functionality, toggles or using the search functionality. Details of how are included below.

Dashboard View - Items Received in Last 30 Days

The new update on 24th May makes a change to the Underwriter dashboard (List of Broker Requests), so that by default it displays **not completed** requests received in the **last 30 days**. A message explaining this appears at the top of the screen.

This change will not impact those underwriters who have filters saved/applied.

The ^{Hide completed} and ^{Hide Notifications} toggles are switched on by default and switching them off or applying a **Search** or a **Filter** will display items received more than 30 days ago, as applicable.

=	≣ P	PL HG Ma	rine Risks-UAT2						\ 🔑 🤇	JK-UAT2 Rowling Underwriter	Team HG Harwie	ch Marine Unw-UAT2
L	ist of I	broker requests t displays, by default, the re	quests received for the la	Mess wh ast 30 days only. Please use t	age appe nat's being the filter to exter	ars explaining g displayed nd the list of requests show	n. x	Use Search and Filt see items received to the last 30 da These override the 30 days setting	er to prior ys. e last	Client • S4	earch	Search
	Broker	requests	• Show	my broker requests only	Hide complete	d 🚺 Hide Notificatio	ns				Reassi	an ⊽ Filter
		Client :	UMR :	Contract/Endorsement :	Section	Broker :	Broker Company ÷	Resp.Underwriter :	Inception Da	ate : Received Date :	Туре	Sub-type
		PNG-94169	B7777 01172616955	c1	c1	JB Jordan Bey	hese toggles are switched on by	BB Bill-UAT2 Bryson	01/05/2024	01/05/2024 - 17:30	Firm Order	
		PNG-94169	B5635 30163701451	C8	C8	Mick-UAT2	efault but can be switched off	UE Umberto-UAT2 Eco	30/04/2024	30/04/2024 - 16:43	Firm Order	
		PNG-94169	B5635 30161309964	C6	C6	Mick-UAT2 Jagge	BBC UK Aviation Risks-UAT2	William-UAT2 Shakespeare	30/04/2024	30/04/2024 - 16:25	Firm Order	
		Leaderless	B9999 30132523689	C3	C3	JB Jordan Beyer	DAB Test Company	BB Bill-UAT2 Bryson	24/04/2024	30/04/2024 - 13:27	Firm Order	
		PNG-94169	B5635 30131504653	C3	C3	Mick-UAT2 Jagge	r BBC UK Aviation Risks-UAT2	Umberto-UAT2 Eco	30/04/2024	30/04/2024 - 13:18	Firm Order	
		Leaderless	B9999 30131158465	C2	C2	JB Jordan Beyer	DAB Test Company	BB Bill-UAT2 Bryson	24/04/2024	30/04/2024 - 13:13	Firm Order	
		PNG-94169	B5635 30130301179	C2	C2	Mick-UAT2 Jagge	BBC UK Aviation Risks-UAT2	Umberto-UAT2 Eco	30/04/2024	30/04/2024 - 13:05	Firm Order	
		PNG-94169	B5635 30125439174	C1	C1	Mick-UAT2 Jagge	BBC UK Aviation Risks-UAT2	Umberto-UAT2 Eco	30/04/2024	30/04/2024 - 12:59	Firm Order	
		Retest_PNG-92927 3	B1111 19165011636	Retest_PNG-92927 3	Section 2	JAN Jane-UAT2 Auster	GBP UK Marine Risks-UAT2	BB Bill-UAT2 Bryson	19/04/2024	19/04/2024 - 12:43	Correction	Cancel and F
		Retest_PNG-92927 2	B1111 19163041934	Contract A	Section 2	JA Jane-UAT2 Auste	GBP UK Marine Risks-UAT2	BB Bill-UAT2 Bryson	19/04/2024	19/04/2024 - 12:17	Correction	Cancel and F
												1 to 17 of 17 items

If you log out with a Search or a Filter applied, it will still be applied the next time you log in, effectively overriding the last 30 days setting.

This update makes it easier to find items and improves the speed at which the dashboard appears.



Finding Items Received Over 30 Days Ago

As the default setting for the Underwriter Dashboard is now to show items received in the last 30 days, you will need to use the other features such as **Search** and **Filter** on the dashboard if you want to find older items.

The information below explains these features and how to use them.

Dashboard Search

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

This enables Underwriter 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 **List of Broker Requests**, select either Broker requests or Approval requests from the **Dashboard dropdown** menu.

= P	PL HG Mari	ine Risks-UAT2					A	JK-UJ	AT2 Rowling writer	Team HG Harwich Marine L	Jnw-UAT2
List of b	proker requests					Searc	h Dropdown				
		Dashboar	d Dropdown					Client	▼ earch		Search
Broker r	equests	• Show m	y broker requests only Hide	completed	Hide Notifications					Reassign	Filter
	Client :	UMR ÷	Contract/Endorsement :	Section	Broker :	Broker Company :	Resp.Underwriter :	Inception Date 🗧	Received Date ÷	Туре	Sub-type
	Brewer Holdings 060324	B1111 061234252yV	Property	Property	AD Alexander-UAT2 Dumas	NYY UK Marine Risks-UAT2	JR JK-UAT2 Rowling	06/03/2024	06/03/2024 - 13:01	Firm Order	
	PNG-79684	B1111 05164000311	Test 2	Test 2	MT Mick-UAT2 Taylor	BBC UK Aviation Risks-UAT2	BB Bill-UAT2 Bryson	05/03/2024	05/03/2024 - 17:14	Firm Order	
	Brewer Holdings 230124	B1111 05152126129	Change of address	Property 5	AD Alexander-UAT2 Dumas	NYY UK Marine Risks-UAT2	JR JK-UAT2 Rowling	21/03/2024	05/03/2024 - 15:34	Endorsement Firm Order	OTHR

- 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.

=	∎ P I	PL HG Mar	ine Risks-UAT2) 💬 💷 JK Un	-UAT2 Rowling derwriter	Team HG Harwich M	arine Unw-UAT2
Li	ist of b	proker requests										
									UMP	- 1004		V Caush
									UMIK	* 1234		Search
	Broker re	requests	Show	my broker requests only	Hide completed	Hide Notifications					Reassign	₹ Filter
		Client ÷	UMR ÷	Contract/Endorsement ÷	Section	Broker ÷	Broker Company ÷	Resp.Underwriter ÷	Inception Date ÷	Received Date ÷	Туре	Sub-type 4
		Brewer Holdings 060324	B1111 (1234: 32yV	Property	Property	AD Alexander-UAT2 Dumas	NYY UK Marine Risks-UAT2	JR JK-UAT2 Rowling	06/03/2024	06/03/2024 - 13:01	Firm Order	(
		PNG-82979	B1111 1234 847	Test 5-1	Test 5-1	MICK-UAT2 Taylor	BBC UK Aviation Risks-UAT2	BB Bill-UAT2 Bryson	12/01/2024	12/01/2024 - 12:37	Firm Order	(
		PNG-74298	B1234 7110426300	Contract 1	Section 2	BT Broker Team Lead Approver	Company 1	WS William-UAT2 Shakespeare	17/08/2023	17/08/2023 - 11:21	Firm Order	(
		PNG-74298	B1234 7110426300	Contract 1	Section 1	BT Broker Team Lead Approver	Company 1	William-UAT2 Shakespeare	17/08/2023	17/08/2023 - 11:21	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 dashboard.

Applying Filters

Filters can be used by Underwriters to find not completed items that are over 30 days old. Filters available include Inception Date, Received Date, Broker or a combination of the information available on the dashboard. When logging off, an applied filter will remain applied when you next logon. To apply a filter:

- 1. On the dashboard, select the Filter button.
- 2. Select a field you want to filter by and either search for the required item or select it from the list.
- 3. Repeat for other fields. Once you have selected the criteria for this particular filter, select Save.

In the example below, the Underwriter's dashboard has been filtered by the **Broker** Alexander Dumas, an **Inception Date** between 01/05/2023 and 31/07/2023 and a **Type** of Firm Order:

≡ P	PL HG Marin	e Risks-DEMO1							JK-DEN Underwr	401 Rowling iter	Tearn HG Harw	ich Marine Unw-DEMO1
List of	t of broker requests											
												Search
Broke	r requests	Show my brok	er requests only Hide com	pleted Hide Not	ifications						Reassign	Filter ()
	Client ¢	UMR ‡	Contract/Endorsement ‡	Section	Broker ‡	Broker Company ÷	Resp.Underwriter +	Inception Date 🗧	Received Date 💠	Туре	Sub-type	Status
	Brewer Holdings 290623	B1111 29112509L7V	MRC Property.pdf	EEA	Alexander-DEM01 Dumas	NYY UK Marine Risks-DEMO1	BB Bill-DEM01 Bryson	29/06/2023	29/06/2023 - 12:38	Firm Order		Complete
	Brewer Holdings 090623	B1111 09095046MtX	Property	Property	Alexander-DEM01 Dumas	NYY UK Marine Risks-DEMO1	BB Bill-DEM01 Bryson	09/06/2023	09/06/2023 - 11:03	Firm Order		Responded
	Brewer Holdings 190523	B1111 19075422mdd	MRC Property.pdf	MRC Property.pdf	Alexander-DEM01 Dumas	NYY UK Marine Risks-DEMO1	BB Bill-DEM01 Bryson	19/05/2023	19/05/2023 - 09:07	Firm Order		Responded
	Brewer Holdings 17053	B1111 1715504616q	Property	Property	AD Alexander-DEM01 Dumas	NYY UK Marine Risks-DEMO1	BB Bill-DEM01 Bryson	17/05/2023	18/05/2023 - 10:12	Firm Order	Withdrawn	Complete
	Brewer Holdings 120523	B1111 121319032RR	Property MTMC	Property MTMC	AD Alexander-DEM01 Dumas	NYY UK Marine Risks-DEMO1	BB Bill-DEMO1 Bryson	12/05/2023	12/05/2023 - 14:26	Firm Order		Complete
	Brewer Holdings	B1111 091501407pV	MRC Property.pdf	MRC Property.pdf	AD Alexander-DEM01 Dumas	NYY UK Marine Risks-DEMO1	BB Bill-DEMO1 Bryson	09/05/2023	09/05/2023 - 16:06	Firm Order		Not Responded

Save Filters on the Underwriter Dashboard

Underwriters can now save up to 20 filters on their list of Broker requests. To do this:

- 1. On the list of Broker requests, select the Filter button.
- 2. In the Filter screen that appears, select the required field(s) for this filter and enter information or select options to set your criteria e.g. UMR, Broker, Status etc.
- 3. Scroll to the bottom of the Filter screen and select Save/Update Favourite.
- 4. Leave the Save As field as 'New and enter a Filter name (up to 40 characters).
- 5. Select Save.
 - **Note:** When saving a favourite filter, the value in the dashboard drop-down (Broker Requests or Approval Requests) is also saved.
- 6. The list of Broker requests will be filtered, as indicated by the Filter button
- 7. Repeat the process for any additional filters.
- Note: If the Underwriter sits across multiple teams, the filter can be viewed by the Underwriter across all their teams. The filter(s) won't however be seen by other team members as they are user specific. Saved filters will also remember the order of the columns on the dashboard and any toggles that have been applied, for example the Hide notifications toggle.

Reapply a Previously Saved Filter

PLATFORM

P

- 1. Select the Filter button.
- 2. Select the **My Favourite Filters** drop-down field and select the required filter.

The selected filter we be applied.

Note: Filters are 'sticky' so any applied ones will remain applied the next time you log in.

Update an Existing Filter

- 1. Apply the required filter.
- 2. Select the Filter button.

\Xi Filter 🕕

- Make the required changes to the filter criteria then Scroll to the bottom of the Filter screen and select
 Save/Update Favourite.
- 4. In the Save As field, either select New and give the filter a name or select the name of an existing filter.
- 5. Select Save.

Delete a Saved Filter

- 1. Apply the required filter.
- 2. Select the Filter button.

\Xi Filter 🚺

- 3. Select Save/Update Favourite.
- 4. In the Save As field, select the filter to be deleted.
- 5. Select Delete Favourite.

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.

Inception Date	÷	Received Date	ŧ
01/06/2022		14/07/2023 - 11:	58

Delete Favourite

Save/Update Favourite

December Inceptions

Save As

Filters, sorting and selecting Broker 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.

Filter	×
My Favourite Filters	
Apply a favourite filter	-
Apply a favourite filter	
Broker - Alexander Dumas	
December Inceptions	

Date/Time Received Column

Ρ

A new **Received Date** column has been added to the right of the Inception Date column, showing both the date and time the request was received:

Broker requests Broker requests only Hide completed Hide Notifications									eassign	∓ Filter 0
•	Contract/Endorsement ÷	Section	Broker ÷	Broker Company ÷	Resp.Underwriter ÷	Inception Date 💠	Received Date 🗧	Туре	Sub-type	Status
1 01164726926	Property 3	Property 3	AD Alexander-UAT2 Dumas	NYY UK Marine Risks-UAT2	BB BIII-UAT2 Bryson	01/12/2023	01/12/2023 - 17:01	Firm Order		S Responded
1 29174841626	Increase limit	Property 2	AD Alexander-UAT2 Dumas	NYY UK Marine Risks-UAT2	JR JK-UAT2 Rowling	29/11/2023	30/11/2023 - 13:52	Endorsement Firm Order	INCR	Sesponded
l 10165917Vxr	Increase Limit	Property	AD Alexander-UAT2 Dumas	NYY UK Marine Risks-UAT2	JR JK-UAT2 Rowling	10/11/2023	10/11/2023 - 17:29	Endorsement Firm Order	INCR	Not Responded
l 10165917Vxr	Property	Property	AD Alexander-UAT2 Dumas	NYY UK Marine Risks-UAT2	JR JK-UAT2 Rowling	10/11/2023	10/11/2023 - 17:19	Firm Order		Complete
1 30144143669	C1	C1	AD Alexander-UAT2 Dumas	NYY UK Marine Risks-UAT2	JR JK-UAT2 Rowling	30/01/2023	30/01/2023 - 14:49	Firm Order		Not Responded

The column can be sorted by clicking the column heading, and the **Filter** also contains options to filter the list using **Received Date – From** and **Received Date – To** fields.

Hide Completed Items

From 24th May, all 'Completed' items will be hidden by default. Underwriters can hide/unhide completed items from their list of Broker requests by using the toggle 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, the **Show My Placements only** and **Hide Notifications** toggles will remember your preference when you next log in.

Note: As with Filters, the Hide Completed toggle setting is 'sticky' meaning that if you switch it off it will remain switched off the next time you log in.

Hide Notification Requests from Underwriter Dashboard

From 24th May, Notifications will not be visible on the new default dashboard. Underwriters can unhide notification items in their list of Broker requests by selecting the toggle above the column headings as shown below:

List of broker requests

Broker requests	• Show my	broker requests only Hide com	pleted Hide Notifie	cations		Reassign	∓ Filter 0
Client \$	UMR ‡	Contract/Endorsement \$	Section	Broker \$	Broker Company \$	Resp.Underwriter \$	Inception Da

All requests with a status of 'Notification' will be hidden by default. Selecting the toggle again will turn it off and the setting will remain the next time you log in.

Note: All notifications will still be visible in the Notifications Dashboard (accessed by clicking on the bell icon at the top of the screen) and it is recommended to use this for managing notifications. A corresponding email will have been sent for each of the notifications on this dashboard, and the notifications can be marked as read or deleted entirely.



Team working for UWs

Team View

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

Reassigning Items

When an Underwriter receives a Broker request for subsequent processing after signing and closing (e.g. for corrections or endorsements), they can be reassigned to the appropriate person. Future Broker requests can then be completed by the newly assigned Underwriter.



A guide covering reassigning items is available in PPL Learning.

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.

Using the Notifications Screen

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 Brokers.

- 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:

PPL

Renewals - Useful Features - Underwriters

≡ P P L	HG Marine Risks-UAT2		A P JR JK-UAT2 Rowling	Team HG Harwich Marine Unw-UAT2
Notifications	Select all Kide read		0 selected 🔳 Delete 🔒 N	Mark as read 🔻 Filter 🔮
All Additional Info	• 🚳 🛛	NYY UK Marine Risks-UAT2 - Alexander-UAT2 Dumas 2404 Property Facility - MRC Property Facility	Published ()	Today - 11:18 Facility
Asynchronous Declaration	• 🔕 🗌	NYY UK Marine Risks-UAT2 - Alexander-UAT2 Dumas 24/04 Property Facility - MRC Property Facility	Signed Line	Today - 11:18 Sign & Close
Draft	• 🔊 🗌	NYY UK Marine Risks-UAT2 - Alexander-UAT2 Dumas 24/04 Property Facility - MRC Property Facility	Request 🔇	Today - 11:12 Firm Order
Facility	• 🔊 🗌	NYY UK Marine Risks-UAT2 - Alexander-UAT2 Dumas 15/04 Property Placement Complete - Property 1	Signed Line 🖉	15/04/24 - 13:39 Sign & Close
Firm Order MI Report	• 😡 🛛	BBC UK Aviation Risks-UAT2 - Mick-UAT2 Jagger PNG-91568_2 - C1	Accepted 🥝	11/04/24 - 15:45 Firm Order
Misc Not Taken Up	• 🚳 🗌	BBC UK Aviation Risks-UAT2 - Mick-UAT2 Jagger PNG-91566 - C1	Accepted 🥑	11/04/24 - 15:24 Firm Order
Quote Sian & Close	• 📣 🗌	NYY UK Marine Riaks-UAT2 - Alexander-UAT2 Dumas 10/04 Placement - X5 Layer	Signed Line 🥑	10/04/24 - 14:41 Sign & Close
	• 🜆 🗌	NYY UK Marine Risks-UAT2 - Alexander-UAT2 Dumas 10/04 Placement - XS Layer	Lead Agreed 🛛 🤡	10/04/24 - 14:33 Firm Order
	• 📣 🗌	NYY UK Marine Riaks-UAT2 - Alexander-UAT2 Dumas 10/04 Placement - X5 Layer	Request 🕓	10/04/24 - 13:34 Firm Order
	• 🔕 🗌	NYY UK Marine Risks-UAT2 - Alexander-UAT2 Dumas 10/04 Placement - Property	Signed Line 🛛 🎯	10/04/24 - 11:24 Sign & Close
	• 🙆 🗌	NYY UK Marine Risks-UAT2 - Alexander-UAT2 Dumas 10/04 Placement - Property	Accepted 🥑	10/04/24 - 11:23 Firm Order
	• 📣 🗌	NYY UK Marine Risks-UAT2 - Alexander-UAT2 Dumas 10/04 Placement - Property	Request 🔇	10/04/24 - 11:06 Firm Order
	1 to 20 of 312 items			1 2 3 4 16 >

- 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. Request \bigcirc , Lead Agreed \oslash etc.
- The final column shows the date, time and category of the notification.
- 3. You can also select 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.

Icons on the Overview Tab

Icons are displayed on the Overview tab, on the relevant levels (nodes) of the Placement. This makes it easier for Underwriters to see when there are **Multiple Participation** . Line Conditions or Subjectivities present on a contract or section.



Leader's Line Displayed

Once the Leader's line has been accepted, the Leader's line, stamp and written line percentage or amount will be displayed near the top of the **Response** tab for following Underwriters to see, as shown below:

~	CM BH UK Marine Risks-UAT2 (Caitlin-UAT2Moran)	
*	Slip Leader XIS Leader	Written line - 60%
	Stamps	
	Brisbane Heat Carrier Co Ltd, London, England (non bureau)-UAT2	30%
	BrisCo Heat Carrier Co Ltd, LIRMA B4912, London, UK-UAT2	30%
	Subjectivities	
1	> Subject to survey	Expired
	01/11/2023 Deadline date - On cover	

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

■ P P L HG Marine Risks-UAT2	A CALL AND	Team HG Harwich Marine Unw-UAT2
My Requests / Property Property ① Overview		
Brewer Holdings 10/11 → Property	Previously Sent to Broker	
No responses to send	10165917Vxr - Property - JK-UAT2 Rowling Proposed Line - 60% Written line - 60%	© 📔

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



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.

Messages	Data	Documents Response		
Non-synchron	ised 군 v01 Sign &	Close Signed Line		
Property	VOT OIGH &	Vigita Line		
Contract do	ocuments			
File Name		Document Type	Description	
V1.1 MRC P	roperty.pdf	Contract	MRC Property.pdf	+

Stamp Selection

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.

A guide covering the stamp selection options is available in PPL Learning.

Copy Response from Other Section

When you are responding to sectioned contract and you have been offered lines on more than one section, you have the option to copy your response from a section you have completed.

- 1. Open the request from the Broker.
- 2. On the **Overview** screen, select the first section you want to respond to.
- 3. On the **Response** tab, complete the fields and save your response.
- 4. Select the next section you want to respond to.



5. On the **Response** tab, select the **Copy other section** button at the top right of the screen.

= P P L HG Marine Risks-UAT2	▲ 🥵 JR ULT2 Rowing Team Underwriter HG Hanwich Marine Unw-UAT2
My Requests / Property Property Overview	
15/04 Property Placement	Messages Data Documents Response
✓ C 08122553263 - Property 3 v01	EEA v01 Firm Order • Requested Copy other section
S UK-UK	Responsible Underwriter
S EEA - EEA () ···	UR HG Marine Risks-UAT2 - JK-UAT2 Rowling
	Original Proposed 👻
	Section Leader Decline role
	Lloyd's Leader Decline role Loyd's Second Leader proposed but not agreed B Property Risks-UAT2 - Charles-UAT2 Dickens
	Written line basis Proposed line Total Written Line
	Percentage of Whole 60 % 60 %
	Permitted territory
	Show All
	Proposed Stamps
	> Lloyds Underwriter Syndicate No. 4321 HGL, London, England-UAT2
	+ Add stamp

6. Select the section to copy from, then check the details and select Copy details.

Copy From Another Section	×
elect the section you wish to copy from	
ик	•
Proposed Stamps	
Lloyds Underwriter Syndicate No. 4321 HGL, London, England-UAT2	
Percentage of Written line	100
Written line	60%
Risk Code	
Llovds Underwriter Svndicate No. 4321 HGL. London. England-UAT2	
1E - OVERSEAS LEG TERRORISM ENERGY OFFSHORE PROPERTY	100%
References	
Lloyds Underwriter Syndicate No. 4321 HGL, London, England-UAT2	
sdfg6387	1E
Cancel	Copy details

- 7. The information shown will be copied to the current section. Complete the other fields as required and select **Save Response**.
- 8. When ready, send your responses for all sections back to the Broker.

Save & Send Response

Ρ

Ρ

PLACING PLATFORM LIMITED

Saving and sending your responses back to Brokers is a two-step process, enabling you send multiple items on a placement together, and to re-check your response before it is sent.

- 1. On the **Overview** tab, select the required contract, section, or endorsement. The number next to the tab highlights which stage you are on.
- 2. On the right of the screen, select the **Response** tab and complete the fields as appropriate.
- 3. At the bottom of the screen, choose your response and then select **Save Response**:

= P P L HG Marine Risks-DEM01	JK-DEM01 Rowling Team HG Harwich Marine Unw-DEM01
My Requests / Property Property	
Overview ——② Select and send response	_
20/05 Property Placement	Messages Data Documents Response
	02/06/2024
C 201407551EZ - Property 1 2024 v01	Instalment period of credit (days)
	0
	Adjustment period of credit (days)
	0
	And the state of the second se
	Subjectivities
	+ Add new subjectivity
	Accept or reject Property 1 2024 - 201407551EZ v01
	Accept
	Add note here
	Save Response

4. A confirmation that the response has been saved will appear, followed by the **Select and send response** tab.

Note: your response back to the Broker **is not sent** until the Select and send response screen is completed.



5. Select the items that you want to send back to the Broker – the response details will appear on the right of the screen. Select **Send Response**.

= PPL HG Marine Risks-DEM01	Control Contro	Team HG Harwich Marine Unw-DEMO1
My Requests / Property Property O overview — Select and send response		
20/05 Property Placement	Response	
Firm Order Request	201407551EZ v01 Firm Order Requested Property 1 2024	
201407551EZ - Property 1 2024 - JK-DEMO1 Rowling	IR HG Marine Risks-DEM01 - JK-DEM01 Rowling	
Add approver	Amended Details	
	★ Slip Leader Decline role	
	🕉 Lloyd's Leader 🛛 🔲 Decline role	
	Written line basis Proposed line	Total Written Line
	Percentage of Whole 100 %	100 %
	Permitted territory	
	Show All	
	Proposed Stamps	
	> Lloyd's Underwriter Syndicate No. 4321 HGL, London, England-DEMO1	100%
Send response	- A alal - A	

6. On the confirmation screen that appears, review the information and select **Confirm**.

Important: You may be about to commit to a legally binding contract.	×
201407551EZ - Property 1 2024 - JK-DEMO1 Rowling 🌟 🕉	Accepted 📀
If you have stated that you wish to commit unconditionally to a written line for this risk on the terms specified in the Firm O "Confirm", you will be accepting the terms of cover as offered to you and the written line size specified in the previous page	rder, and you now click
If you have stated that you wish to reject the Firm Order offered to you in relation to this risk, and you now click "Confirm", y terms of cover offered to you.	ou will be rejecting the
If you have stated that you wish to accept a written line for this risk, but wish to propose additional or different terms, incluu is a counter-offer, and if you now click 'Confirm', you will be offering to enter into an insurance contract on the terms of the the buyer agrees to your proposed additional or different terms. If the buyer does this, you will become legally bound to this contract or your subjectivities explicitly say otherwise.	ding subjectivities, this Firm Order but only if s contract unless the
	Cancel Confirm

7. The response will now be sent to the Broker. On the right of the **Select and send response** screen, the contracts, sections, and endorsements that have been sent will appear. These can be selected to review the information.

= P P L HG Marine Risks-DEM01	JK-DEMO1 Rowling Teem Underwriter HG Harwich Marine Unw-DEMO1
My Requests / Property Property ① Overview	
20/05 Property Placement → Property 1 2024	Previously Sent to Broker Image: DV05 Property Placement - 20/05/2024 16:46:40 Image: Dv0551EZ - Property 1 2024 - JK-DEM01 Rowling Image: Dv0551EZ - Property 1 2024 - JK-DEM01 Rowling Proposed Line - 100%

8. Select the **Generate Firm Order Doc** icon **b** as required.