

UNDERWRITERS



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 stamps, 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 Views.



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 Alerts tab on your dashboard (or the Bell icon) to display all your Notifications. These can be filtered or clicked to access the subject of the notification. Every notification also has a corresponding email.



5. Documents

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

6. Selecting Stamps

You can easily change the stamp suggested by the Broker, or select a stamp if they haven't chosen one.



7. Sections

If you have been offered lines on more than one section on a contract, you can copy your response from one section to another.

8. Links & Documents in Emails

When receiving notification emails from Brokers, click the included link to access the appropriate item in PPL. You will also receive an email containing a PDF of the MRC + security details



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