

Contents

Brokers – Assign Slip Leader Role to an Alternative Section Leader	2
Brokers – Endorsement Requests Reassigned to a Different Underwriter	3
Brokers – Update Details on Declaration Facility Panels When Leader/Co-Leader Rejects.....	4
Brokers and Underwriters – Warning When Generating Firm Order Docs with Supporting Docs	5
Underwriters – Validation of the Firm Order Response on New Endorsements Response Screen	6
Underwriters – Validation When Updating a Firm Order Response to ‘Rejected’ After an Endorsement Response Saved to ‘Accepted’	6
Underwriters – Error Message at Endorsement Save and Send Response Screen if No Accepted Associated Firm Order	6

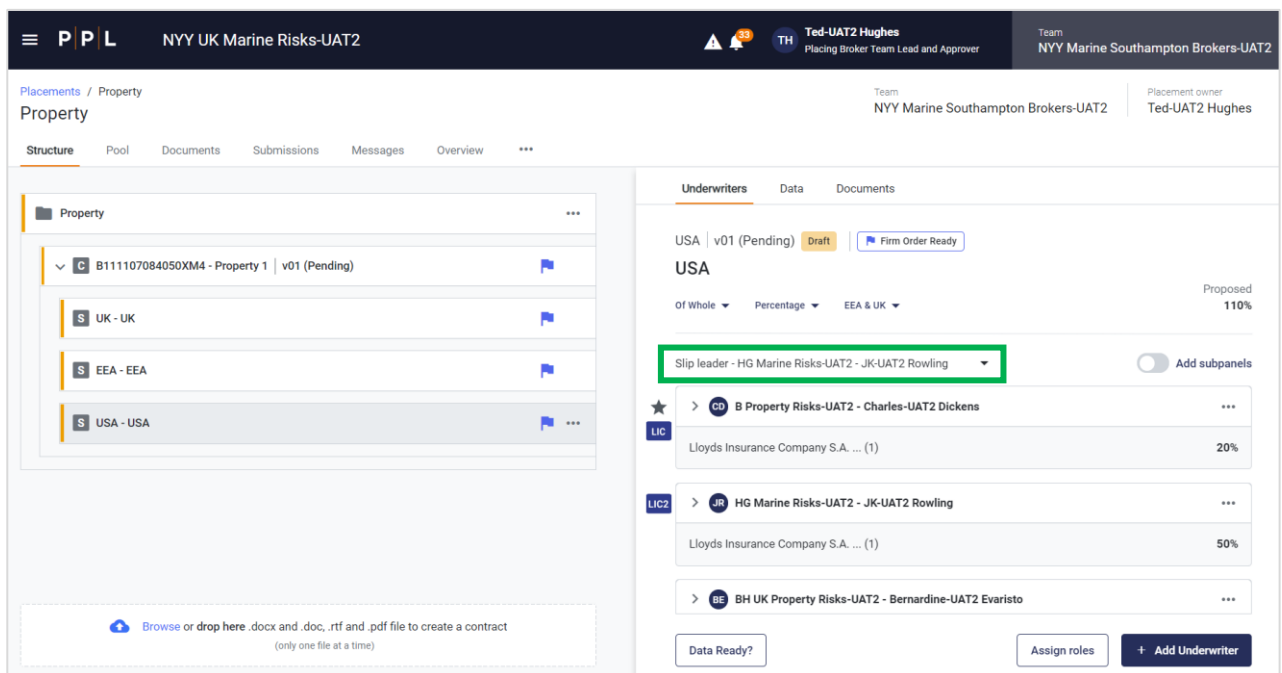
This document highlights the key new or improved features available in the September 2024 release. The new Express Contract features for Brokers are covered in a separate guide.

Brokers – Assign Slip Leader Role to an Alternative Section Leader

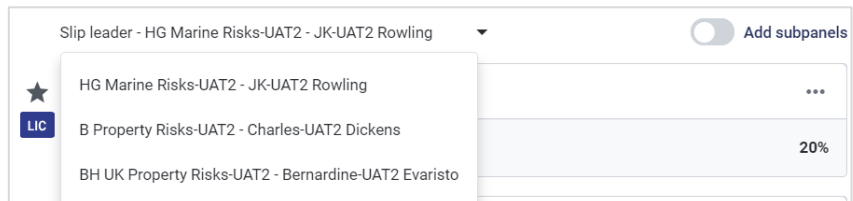
Where a contract has multiple sections with varying section leads, Brokers can now manually assign one of the Underwriters leading a section to be Slip Leader.

This provides Brokers with greater flexibility in the assignment of the Slip Leader role.

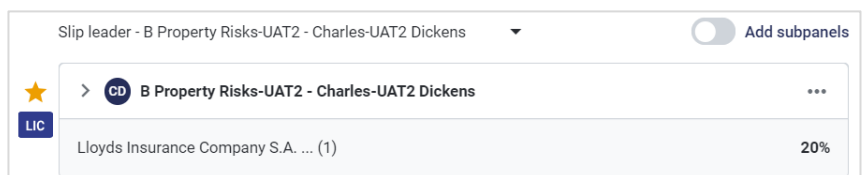
1. Create the contract and sections as usual.
2. On each section, add the Underwriters and their proposed lines.
3. Select **Assign Roles**. The Slip Leader role will be applied to the Lead Underwriter on the first section.
4. On the **Underwriters** tab of any of the sections, a drop-down will appear above the Underwriter panels:



5. Select the drop-down. The Underwriters who are the Section Leads in the contract will be listed, with the current Slip Leader shown at the top:



6. Select the Underwriter who is to become the Slip Leader. The Assign Roles process will start automatically and the selected Underwriter will now be the Slip Leader.



Note: Slip Leaders are indicated with a gold star ★ and Section Leaders with a silver star ☆.

Brokers – Endorsement Requests Reassigned to a Different Underwriter

When an Underwriter reassigns an Endorsement request (regardless of the status) to another Underwriter, the Broker’s Endorsement Underwriter card shows the latest Underwriter details.

This will ensure that the correct Underwriter details are shown for the Endorsement.

1. In the example below, the Broker has sent the Endorsement to the Underwriter (Mary Beard):

The screenshot shows the PPL interface for 'Property' under 'NYUK Marine Risks-UAT2'. The left sidebar lists several properties, with '0001 - Increase Limit' selected. The main area shows the endorsement details for '0001 Increase Limit' with a status of 'In Progress'. The 'Underwriters' section shows a dropdown menu with 'HG Marine Risks-UAT2- Mary-UAT2 Beard' selected and highlighted with a green box. Below the dropdown, the underwriter details are listed: 'Lloyd's Insurance Company S.A. HGL 5321; Reinsured by Lloyd's syndicate HGL 4321-UAT2'.


2. The Underwriter has reassigned the Endorsement to another member of their team (JK Rowling). This change will then show on the Broker’s Endorsement Underwriter card:

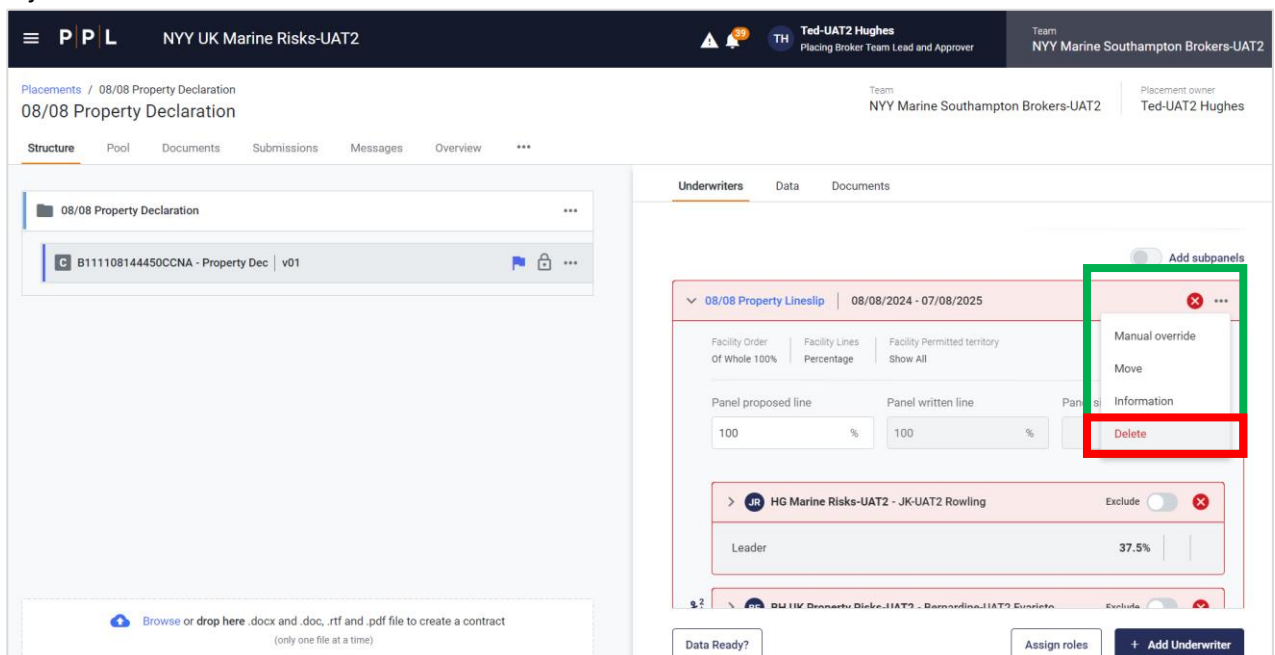
This screenshot shows the same endorsement request as above, but the dropdown menu in the 'Underwriters' section now shows 'HG Marine Risks-UAT2- JK-UAT2 Rowling' selected and highlighted with a green box. The underwriter details below now show 'Lloyd's Insurance Company S.A... (1)'. The rest of the interface remains the same.

Brokers – Update Details on Declaration Facility Panels When Leader/Co-Leader Rejects

When the Leader or Co-Leader on a Declaration Facility panel chooses to reject participation, Brokers now have the option to edit the details on the Facility panel.

This enables the Broker to submit a new Declaration Firm Order request to the same panel.

1. The Broker creates the Declaration, adds the required Facility, and submits it to the Underwriters in the normal way.
2. The Lead Underwriter in this example then rejects the proposed participation and sends their response back to the Broker.
3. When the Broker views the structure and selects the **Underwriters** tab, the Facility panel will show as rejected :



4. Select the ellipsis menu and then select **No Longer Required**. The Facility Declaration panel will be greyed out.
5. The Broker can now edit the Underwriters tab as required before resubmitting the Declaration. The Underwriters on the 'No Longer Required Facility panel will not be included.

Brokers and Underwriters – Warning When Generating Firm Order Docs with Supporting Docs

When generating the Firm Order docs, the option exists to include the supporting documents in the download. However, some file types are not able to be displayed correctly using this method.

A warning message will therefore appear when doing this, as shown below:

Only Word, Excel and PDF (and associated file types) will render correctly

The associated file types included are:

MS Excel	MS Word
Excel Workbook (*.xlsx)	Word Document (*.docx)
Excel Macro-Enabled Workbook (*.xlsm)	Word Macro-Enabled Document (*.docm)
Excel Binary Workbook (*.xlsb)	Word 97-2003 Document (*.doc)
Excel 97-2003 Workbook (*.xls)	Word Template (*.dotx)
CSV UTF-8 (Comma delimited) (*.csv)	Word Macro-Enabled Template (*.dotm)
XML Data (*.xml)	Word 97-2003 Template (*.dot)
Single File Web Page (*.mht, *.mhtml)	PDF (*.pdf)
Web Page (*.htm, *.html)	XPS Document (*.xps)
Excel Template (*.xltx)	Single File Web Page (*.mht, *.mhtml)
Excel Macro-Enabled Template (*.xltm)	Web Page (*.htm, *.html)
Excel 97-2003 Template (*.xlt)	Web Page, Filtered (*.htm, *.html)
Text (Tab delimited) (*.txt)	Rich Text Format (*.rtf)
Unicode Text (*.txt)	Plain Text (*.txt)
XML Spreadsheet 2003 (*.xml)	Word XML Document (*.xml)
Microsoft Excel 5.0/95 Workbook (*.xls)	Word 2003 XML Document (*.xml)
CSV (Comma delimited) (*.csv)	Strict Open XML Document (*.docx)
Formatted Text (Space delimited) (*.prn)	OpenDocument Text (*.odt)
Text (Macintosh) (*.txt)	
Text (MS-DOS) (*.txt)	
CSV (Macintosh) (*.csv)	

This will ensure that users are aware of the file types that can be generated and downloaded using this method.

Underwriters – Validation of the Firm Order Response on New Endorsements Response Screen

Prior to this release, the Endorsement response screen did not restrict Underwriters from responding to Endorsements based on their linked Firm Order participation. This new validation will enable Underwriters to **save OR restrict** the Endorsement response based on the links between the Endorsement participation and its corresponding Firm Order participation status.

This enables Underwriters to respond to Endorsement requests based on their corresponding Firm Order participation, with the platform providing guidance on what they can do with the Endorsement request.

Underwriters – Validation When Updating a Firm Order Response to ‘Rejected’ After an Endorsement Response Saved to ‘Accepted’

When an endorsement has been saved as ‘Accepted’ by an Underwriter and the linked Firm Order response is subsequently updated to ‘Rejected’, the Underwriter will now see a warning message reminding them to reject all the associated endorsements.

This will help Underwriters to decide on the actions that should then be taken.

Underwriters – Error Message at Endorsement Save and Send Response Screen if No Accepted Associated Firm Order

When an Underwriter is responding to an Endorsement request and moves to the Select and Send response screen, if one or more endorsements do not have an accepted associated Firm Order, the error message highlighted below will appear.

The screenshot shows the P|P|L software interface. At the top, there is a dark navigation bar with the P|P|L logo and the text 'B Property Risks-UAT2'. Below this, the breadcrumb 'My Requests / Property' is visible. The main heading is 'Property', followed by a progress indicator with two steps: '1 Overview' and '2 Select and send response'. The current view is 'Brewer Holdings 030424 -> Property 5'. A red error message box is highlighted with a green border, containing the text: 'Please ensure you DO NOT respond to any endorsement request without also responding to the associated contract firm order/correction request'. Below the error message, the 'Firm Order Request' section is visible, showing a dropdown menu with '07145553654 - Property 5' and a checkbox. Below that, a table entry is shown: 'E Increase Limit - Charles-UAT2 Dickens | 03/04/2024 - 02/04/2025' with a green checkmark icon.

This will help the Underwriter ensure that an endorsement acceptance is not sent to the Broker before the associated Firm Order acceptance.