

March 2026 Release (3.3.1)

User Guide



This document highlights the key new or improved features available in the March 2026 release.

Contents

Brokers – New Express Quote Feature for Quote Enquiries.....	3
Underwriters – Responding to ‘Enquiry’ Quotes	5
Brokers – Expression of Interest Response to Quote Enquiry from Underwriters.....	6
Brokers – Progressing a Quote Enquiry	7
API Updates.....	9
What is an API?	9
Brokers API – Reassigning Contracts (within your own Team or Company)	10
Underwriters API – Manage Endorsement Responses	11

Brokers – New Express Quote Feature for Quote Enquiries

The new Express Quote feature enables Brokers to send a Quote enquiry to Underwriters by entering only minimal information. An additional change on the Underwriter side in support of this, enables them to respond to the enquiry with an ‘expression of interest’.

This change means that quote enquiries can be rapidly processed through PPL, making it easier to have the full contract lifecycle entered and tracked in the platform.

1. At the top-right of the Broker dashboard, select the **Express Quote** button.

The screenshot shows the Broker dashboard for 'GBP UK Marine Risks-SAD1'. At the top right, there are buttons for '+ Create Placement', '+ Express Contract / Renewal', and '+ Express Quote'. The '+ Express Quote' button is highlighted with a green border. Below the buttons is a table with columns: Client, Placement, Effective year, Owner, Contract inception, and Status. The first row shows 'client 115501' and 'client 115501 desc'.

2. In the **Quote Details** step, complete the **Quote Description** field and edit the **Period Duration** and **Period Unit** fields as required.

The screenshot shows the 'New Express Quote' form. The 'Quote Details' section is active. It contains three required fields: 'Quote description' (with the value 'New Property Quote #1'), 'Period Duration' (with the value '12'), and 'Period Unit' (with the value 'Month(s)'). A 'Next step' button is visible at the bottom right of the form.

3. Select **Next Step**.
4. In the **Underwriters and Documents** step, select the **Search** field. Enter at least 3 characters of the Underwriter’s name or company – the search results will appear as you type.

The screenshot shows the 'New Express Quote' form in the 'Underwriters and Documents' step. A message states: 'Select at least one Underwriter to enable 'Send Quote Submission' button. If you select any Off Platform Underwriters, submitting will only update the PPL record and will not send the Quote in respect of those Off Platform Underwriters.' Below this is a search bar with the text 'rowling'. A table of results is shown:

Underwriter	Company	Underwriter type
☐ JK-FACEOFF Rowling	HG Marine Risks-FACEOFF	
☐ JK-SAD1 Rowling	HG Marine Risks-SAD1	

Showing 1 to 2 of 2 records

- At the left of the required Underwriter, select the check box. Their name will appear above the Search field.

Delete Quote Submission

New Express Quote

Quote Details

Underwriters and Documents

Select Underwriters

Select at least one Underwriter to enable 'Send Quote Submission' button. If you select any Off Platform Underwriters, submitting will only update the PPL record and will not send the Quote in respect of those Off Platform Underwriters.

JK-SAD1 Rowling - HG Marine Risks-SAD1

rowl

Underwriter	Company	Underwriter type
☐ JK-FACEOFF Rowling	HG Marine Risks-FACEOFF	
☒ JK-SAD1 Rowling	HG Marine Risks-SAD1	

Showing 1 to 2 of 2 records

Add documents

This is an optional step, you can send the Quote without uploading any files.

Browse or drop here files to add supporting documents

Send Quote Submission

Repeat the process for any additional Underwriters.

- Once all Underwriters have been added, use the **Add documents** field to browse for or drag and drop documents into the Quote enquiry. Enter the **Description**, select the **Document Type** and then select **Upload**.

Note: It's not mandatory to add documents to Express Quotes.

- Select **Send Quote Submission**.
- A confirmation banner will appear at the top of the screen containing a **View Contract** link. Select this to display the Quote enquiry in the standard interface.

New Property Quote #1

Structure Pool Documents Submissions Messages Overview

Placements > New Property Quote #1

New Property Quote #1

B111113120446285 - New Property Quote #1 | v01

New Property Quote #1 In Progress

Data	Documents
Client name	New Property Quote #1
Placement description	New Property Quote #1
Placement effective year	2026
Organisation	Green Bay Packer Broker Co Ltd-SAD1
Team	GBP Marine London Brokers-SAD1
Placement owner	Harper-SAD1 Lee

The Quote enquiry will go through to the Underwriter(s) and appear with a new **Sub-Type** of 'Enquiry'.

Underwriters – Responding to ‘Enquiry’ Quotes

When Brokers use the new Express Quote feature, they only need to enter a small amount of information e.g. the quote description and probable period. They can attach documentation to the quote request, but this is optional.

As these are therefore ‘quote enquiries’, a new **Sub-Type** of **Enquiry** has been created. This will appear on your dashboard and on the Messages, Data, Documents and Response tabs.

Client	Contract/Endorsement	Broker Company	Sub-Type	Status	Inception Date	Received Date	Resp. Underwriter
Search by client	Search by contrac...	Select broker compa...	Enquiry	Select status	Select date	Select date	Select Resp. UW
☐ New Property Quote #1	New Property Quote #1	GBP UK Marine Risks-SAD1	Enquiry	☒ Not Responded		13/01/2026 - 12:38	JK-SAD1 Rowling
☐ Test Quote 1	Test Quote 1	GBP UK Marine Risks-SAD1	Enquiry	☒ Not Responded		12/01/2026 - 15:36	JK-SAD1 Rowling

To respond to the Quote enquiry:

1. On your dashboard, select the Quote enquiry. Alternatively, select the link in the notification email you have received.
2. On the left of the screen, select the Contract level, and on the right of the screen, check the Messages, Data and Documents tabs.
3. Select the **Response** tab.
4. Enter the **Max Quoted Line**. You can also enter the **Min Quoted Line** to offer a range to the Broker.

New Property Quote #1

Responsible Underwriter

HG Marine Risks-SAD1 - JK-SAD1 Rowling

Original Proposed

Written line basis Proposed line

Min Quoted Line Max Quoted Line

This field is mandatory

5. If you wish to include a **Premium** in your response, select the **Currency** and then complete the **Amount** field.
- Note:** If a Premium is not required at this point, select the delete icon to remove the fields.
6. Select a **Quote Expiry Date** if required.
 7. Add proposed **Stamps** and **Subjectivities** as required.
 8. If you wish to include any **Quote Response Documents** in your response, use the ‘Browse or drop here’ field.
 9. As this has been sent as a Quote Enquiry by the Broker, the responses available **Expression of Interest** or **Not Interested**. If selecting ‘Not Interested’, select the appropriate **Reason**.
 10. Add any further notes if required (this is mandatory if selecting ‘Not Interested’), then select **Save Response**.
 11. On the **Select and send response** tab, select the checkbox for the Contract and on the right of the screen review your response.
 12. Select **Send Response**. Read the information that appears and select **Confirm**. Your response will now be sent back to the Broker.

Brokers – Expression of Interest Response to Quote Enquiry from Underwriters

When an Underwriter responds to your Quote Enquiry, this will appear as an ‘Expression of Interest’ or ‘Declined’.

To view this:

1. On your dashboard, select the Quote. Alternatively, select the link in the notification email you have received.
2. Select the **Overview** tab.
3. The quote contract and the Underwriter’s response will be shown, with a **Status of Expression of Interest or Declined**.

	Status	Quoted	Proposed	Written line	Signed line
13120446285 - New Property Quote #1 v01	Quote	10%	0%	-	-
HG Marine Risks-SAD1 - JK-SAD1 Rowling	Expression of Interest	10%	0%	-	-

4. Select the Underwriter’s name.
5. On the screen that appears, review the information completed by the Underwriter, including any **Quote Response Documents** they may have uploaded.

New Property Quote #1 → New Property Quote #1

Response Details

HG Marine Risks-SAD1 (JK-SAD1 Rowling)

13120446285 | v01 | Quote | Enquiry | Quoted

New Property Quote #1

Written line basis: Proposed line: % Min Quoted Line: % Max Quoted Line: 10 %

Premiums

Premium

Brokers – Progressing a Quote Enquiry

As a Broker, once you have received an 'expression of interest' on a Quote Enquiry, you can progress it to subsequent stages. To do this:

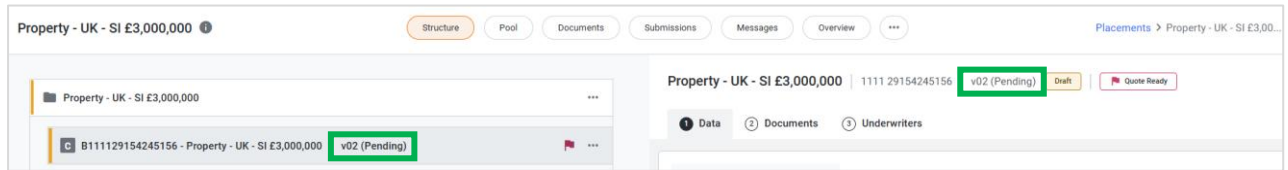
1. On your dashboard, select the Quote. Alternatively, select the link in the notification email you have received.
2. On the Structure tab, select the Contract, then at the bottom-right of the screen select **Create new version**.

The screenshot shows the PPL interface for a quote enquiry. The top navigation bar includes the PPL logo and the text 'GBP UK Marine Risks-SAD1'. Below this, there are tabs for 'Structure', 'Pool', 'Documents', 'Submissions', 'Messages', and 'Overview'. The 'Structure' tab is active, showing a list of contracts on the left. The main panel displays the 'Data' tab for the selected contract, showing fields like Broker team, Unique market reference, Placing broker, Contract type, Broker code, Contract reference, Cover type, Contract description, Class of business, Line of business, Product, Period Duration, Period Unit, Region/Country, and Region. A 'Create new version' button is highlighted in green at the bottom right.

3. The fields on the **Data** tab will now be available for editing. Make the required updates and select **Save Data**.

The screenshot shows the PPL interface for a quote enquiry. The top navigation bar includes the PPL logo and the text 'GBP UK Marine Risks-SAD1'. Below this, there are tabs for 'Structure', 'Pool', 'Documents', 'Submissions', 'Messages', and 'Overview'. The 'Structure' tab is active, showing a list of contracts on the left. The main panel displays the 'Data' tab for the selected contract, showing fields like Contract details (Broker team, Unique market reference, Placing broker, Contract type, Broker code, Contract reference, Cover type, Contract description) and Risk details (Class of business, Line of business, Product, Dates/Range). A 'Save Data' button is highlighted in green at the bottom right.

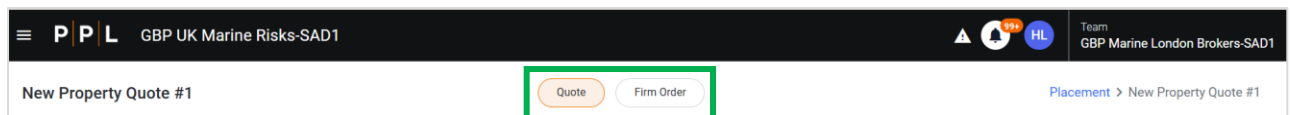
- A confirmation that the Quote has been saved, and the information that needs to be updated to make it a Firm Order will appear. The Quote will also now show as version 2 (v02):



- Once you have made any other required changes e.g. to the **Documents** and/or **Underwriters** tabs, you can submit the Contract to Underwriters as a Quote or a Firm Order, if the required information has been completed.

At the top of the screen, select the **Submissions** tab, choose the submission type and complete the process as normal.

Note: Once you have received a Quote response and a subsequent Firm Order response from an Underwriter (on the same contract version), you will be able to view these responses from the Overview tab. Select the Underwriter's name, then use the tabs at the top of the Underwriter's response screen to toggle between them.

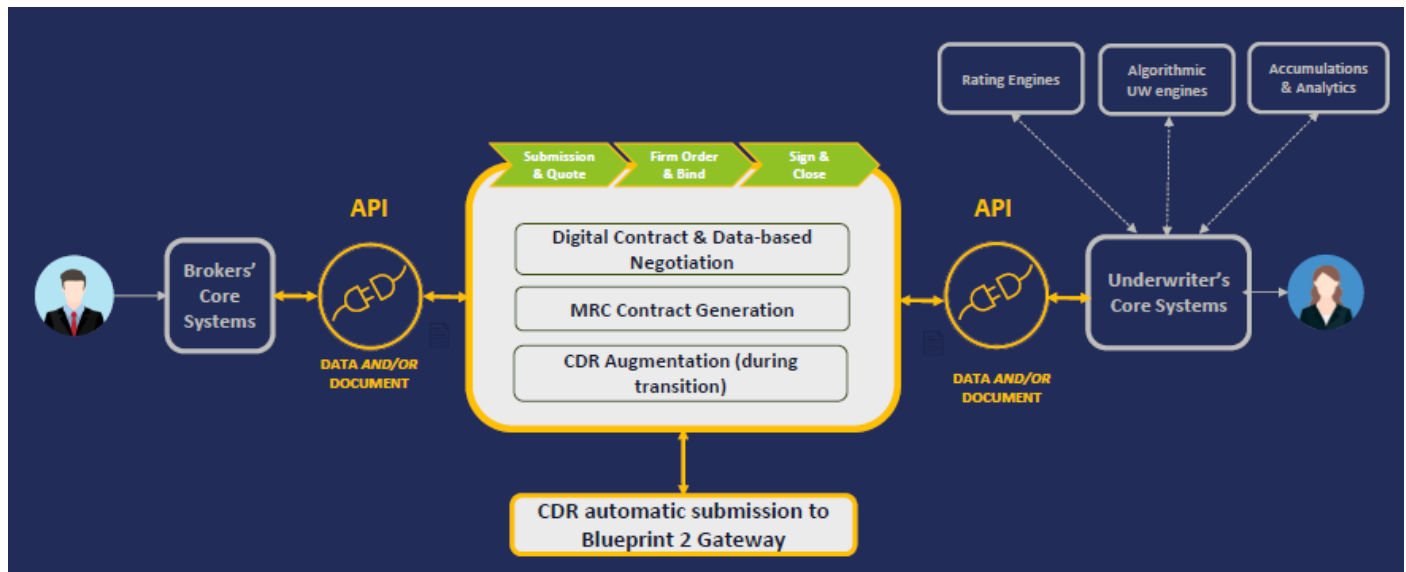


API Updates

What is an API?

An API is a mechanism that enables two software applications to exchange messages or data in a standard format. This means that instead of having to enter the same data in multiple applications/systems, you can enter it in one and the API will pass the data into the appropriate fields in the other application. As well as saving users time, this also reduces the chances for errors to be made.

The diagram below shows how the PPL APIs can connect with Broker and Underwriter core systems, and highlights some of the data that can then be shared between them.



We have numerous APIs available for use. The following pages contain information on some of the key APIs that are being implemented or updated as part of this release.

Brokers API – Reassigning Contracts (within your own Team or Company)

API Collection:	Placement API
API Endpoint(s):	{Env_URL}/Placements/{DomainAPI_Version}/contracts/{contractId}/reassign

This feature extends the Contract capabilities by enabling brokers to reassign Contracts to another placing broker or its ownership to another broking team within the same Broker Company. The Placing Platform supports the following reassignments:

- Reassigning a Contract to themselves;
- Reassigning a Contract to another placing broker in the same broking team;
- Reassigning a Contract to another placing broker in a different broking team (one where the requesting broker is a member of); or
- Reassigning a Contract to another broking team (one where the requesting broker is **not** a member of) and placing broker within the existing Broker Company hierarchy.

The Organisation API provides the requestor of list of one's own teams as well as all team members that the Contract can be reassigned to. When supplying the Company ID as a filter parameter, such as {Env_URL}/Organisation/{DomainAPI_Version}/brokerOrganisations?CompanyId={companyId}, the response will return a full list of all broking teams and team members across the entire Broker Company.

Once the correct team and broker has been identified, the API request to reassign can be sent, where if the correct conditions are met, the reassignment will be actioned.

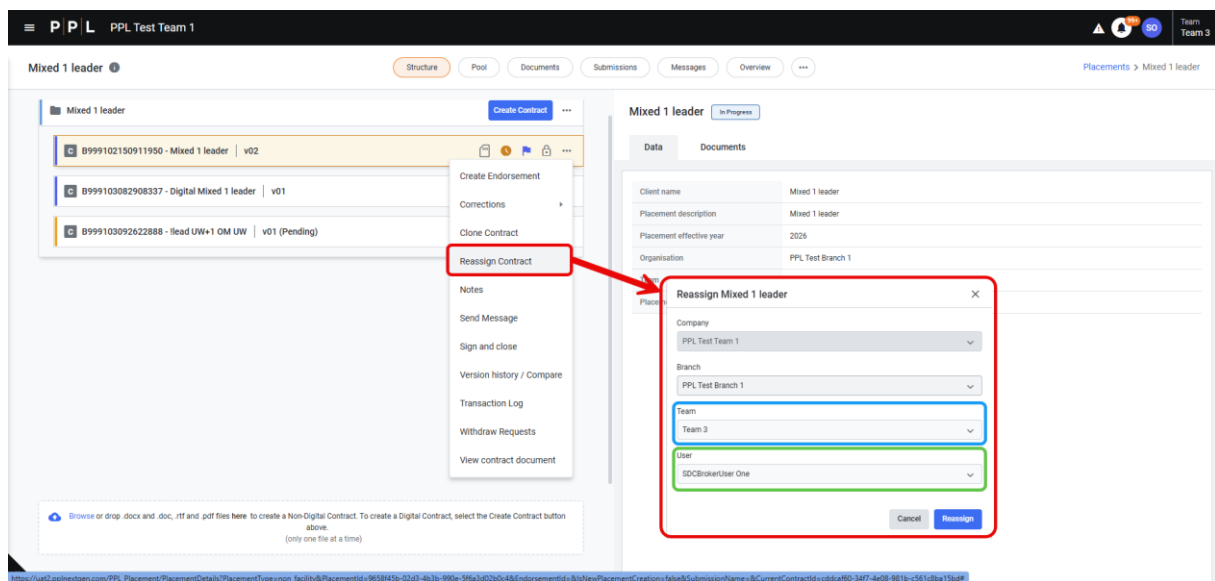


Figure 1 - Broker Contract Reassignment (UI)

Note: As per the existing Placing Platform UI functionality, only users with a team role of “Placing Broker” will be able to have Contracts reassigned to them.

Underwriters API – Manage Endorsement Responses

API Collection:	Submission API
Endpoint:	{base_url}/submission/v1/submissions/{submissionId}/negotiations {base_url}/submission/v1/submissions/{submissionId}/negotiations/{negotiationId}/send
	POST, GET by ID

Following the previous Placing Platform release that provided additional Endorsement-related fields within a Submission resource, Underwriters are now able to save and send Endorsement responses back to the broker.

As an extension to the capability to manage Firm Order responses, Underwriters will now be able to save “Accept” or “Reject” responses to Endorsements from within their back-office systems.

When executed correctly, this potentially avoids a need to log into the Placing Platform. In other operational processes, carrier teams will be able to work collaboratively with their colleagues where, once saved responses are sent from back-office systems to PPL, a lead Underwriter, already logged into PPL will be able to review the response before committing it back to the Broker.

Supplemented with self-actioned Notifications, back-office systems will be able to listen out for “Accepted” Endorsement responses from their own Underwriters within PPL, and ensure the correct, agreed Endorsement information is available in real-time. These added capabilities enable Endorsement information to be available sooner, in preparation for their settlement. Holistically, it can also enhance the overall Operations Teams’ Endorsement processing experience, which can be part of any “headless” or semi-automated business function or operation.

The screenshot displays the Placing Platform (PPL) interface for Hiscox - UK. The top navigation bar shows the PPL logo and user information. The main content area is titled 'Market API - Post Security Download' and includes a breadcrumb trail: 'My Requests / Market API - Post Security Download'. Below this, there are two tabs: 'Overview' and 'Select and send response'. The 'Select and send response' tab is active, showing a list of requests on the left and a detailed response form on the right. The list of requests includes 'B999129150730980 - Market API - Post Security Download | v01' and 'endo1 | 29/01/2026 - 28/01/2027'. The response form on the right is titled '29150730980 - Market API - Post Security Download - endo1 - DECR' and includes fields for 'Slip Leader' and 'LIC Leader'. It also has a section for 'Endorsement Agreement Practice - GUA' with a 'Leader' field and a checkbox for 'Change agreement parties'. A 'Notification to followers?' section has radio buttons for 'Yes' and 'No', and a 'Within number of working days' field set to '7'. At the bottom, there is a dropdown menu for 'Accept or reject 29150730980 - Market API - Post Security Download ...' with 'Accept' selected, a text area for 'Add note here', and a 'Save Response' button.

Figure 2 - Underwriter Save Response (UI)

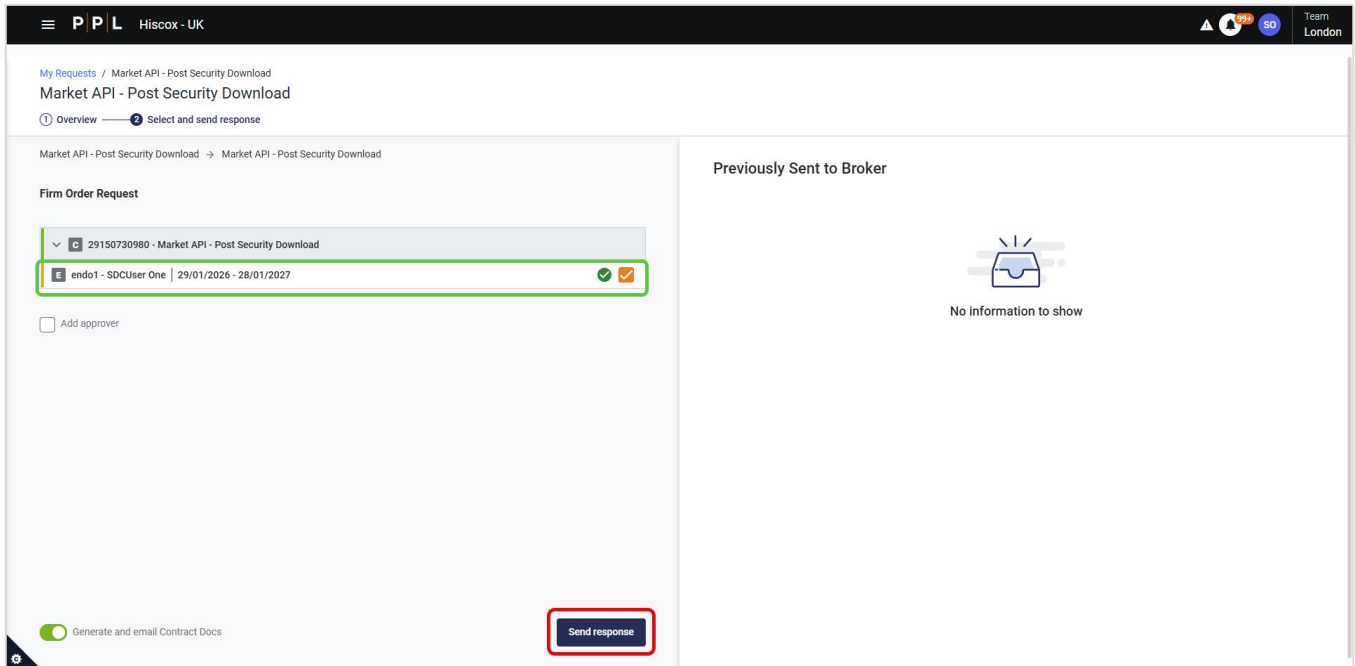


Figure 3 - Underwriter Send Response (UI)

Note: Please note that the “Add Approver” process is not in scope as part of this capability. Based upon the requestor’s team role, any “Send” operations will continue to be checked to ensure that only a “Placing Underwriter” is able to send an Endorsement response to the placing broker.