

This document highlights the key new or improved features available in the February 2025 release.

Many of the changes in this release are primarily to help enable the launch of Template Builder for Brokers, in respect of Digital Contracts. A separate user guide and training sessions are available for this, for Brokers who have pre-arranged access to it.

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Brokers – Node to Remain Selected When Moving Between Submission Builder Tabs

When a Broker is building the submission pack for Quotes, Firm Orders, Endorsements, and Additional Information, on the left of the screen the contract node in the structure will be automatically selected.

This means that the Broker won't have to select the contract node as they move through the Select Documents, Select Underwriters and Prepare Pack tabs.

Brokers – Node to Remain Selected When Moving Between Corrections Submission Builder Tabs

When a Broker is building the submission pack for Cancel & Replace or Panel Change corrections on a contract, on the left of the screen the contract node in the structure will be automatically selected.

This means that the Broker won't have to select the contract node as they move through the Select Documents, Select Underwriters and Prepare Pack tabs.

Brokers – Add Underwriter Endorsement Response Link to Broker Overview Screen

Brokers can now view Underwriters' responses to Endorsement requests from the **Overview** tab, in the same way that they can view them for Contracts and Sections.

The screenshot shows the Placing Platform interface for a submission titled 'Property'. The 'Overview' tab is selected and highlighted with a green box. Below the tab, there is a table of endorsement requests. One row, 'HG Marine Risks-UAT2 - JK-UAT2 Rowling', is highlighted with a green box. This row shows a 'Leader' role and an 'Accepted' status. Other rows show 'Requested' status for 'BH UK Property Risks-UAT2 - Bernadine-UAT2 Evaristo' and 'B Property Risks-UAT2 - George-UAT2 Orwell'.

Contract/Section	Underwriter	Role	Status	Progress
05152126129 - Property 5 v01			Sign & Close	120% 120% 100%
0001 Change of address 31/03/2024 - 20/03/2025	Manual	In Progress	-	-
0002 Increase Limit 01/09/2024 - 20/03/2025	Automatic	In Progress	-	-
JR HG Marine Risks-UAT2 - JK-UAT2 Rowling	Leader	Accepted	-	-
BE BH UK Property Risks-UAT2 - Bernadine-UAT2 Evaristo	Agree All Endorsements	Requested	-	-
GO B Property Risks-UAT2 - George-UAT2 Orwell	Agree All Endorsements	Requested	-	-

1. On the Overview tab, select the chevrons > to expand the required contract/section/endorsement.
2. Select the required Underwriter.
3. Review the Underwriter's response then select the **Close** button.

Brokers and Underwriters – MRCv3 – Data Field Changes to Meet MRCv3 and ACORD Standards

The following changes to fields that appear in both the Broker and Underwriter screens have been made to enable the relevant data to be input via APIs. The changes ensure that the fields comply with MRCv3 structure and requirements.

Limit, Basis, Deductible & Premium

Prior to the update, to add **Limits** you needed to select **+ Add new limit** then enter the Type, select the Currency, and enter the Amount and Basis.

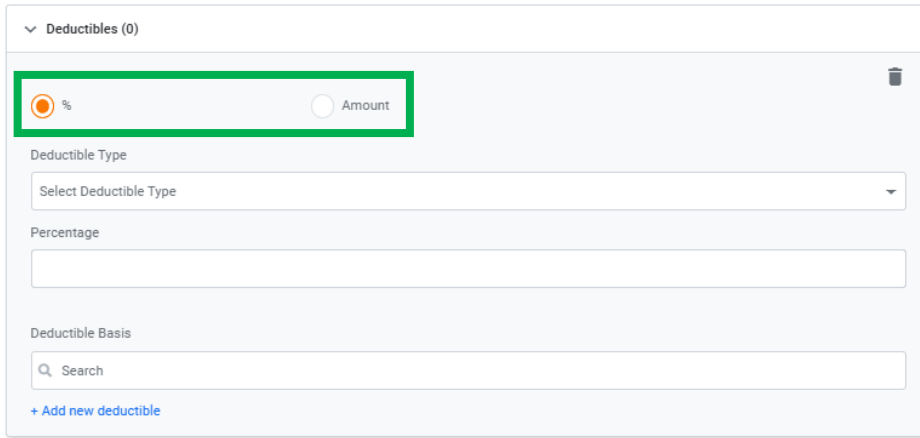
The screenshot shows the 'NYY UK Marine Risks-DEMO1' interface. On the left, under 'Structure', there's a list of property items. On the right, under 'Data', there's a section for 'Limits (0)' with a '+ Add new limit' button highlighted in a green box.

Now, the Limit Type and Currency are dropdowns, Limit Basis is a searchable field, and Amount is a free text field.

The screenshot shows the 'NYY UK Marine Risks-UAT2' interface. On the left, under 'Structure', there's a list of property items. On the right, under 'Data', there's a section for 'Limits (0)' with a form for adding a new limit highlighted in a green box. The form includes fields for 'Limit Type' (dropdown), 'Currency' (dropdown), 'Amount' (text input), and 'Limit Basis' (searchable field).

Expressing Premiums, Excesses & Deductibles as Percentages

The Premiums, Excesses and Deductibles can now be expressed as percentages by selecting the appropriate option.



The screenshot shows a form titled "Deductibles (0)". At the top, there are two radio buttons: one labeled "%" (which is selected and highlighted with a green box) and one labeled "Amount". Below this, there is a "Deductible Type" dropdown menu with the text "Select Deductible Type". Underneath that is a "Percentage" input field. At the bottom, there is a "Deductible Basis" search field with a magnifying glass icon and the text "Search". A blue link "+ Add new deductible" is at the very bottom.

Note: Where Brokers have entered free text values in fields that have changed to dropdowns, they won't lose that text. Each dropdown has an 'Other' option that allows the user to free-type something. Where they have already done this, the dropdown will be automatically set to 'Other' and the free text will be preserved following the update.

Insured Now Added to Section Level

When editing Open Market or Master Facility placements with sections, Brokers will now see a **Type** field at section level. This will default to the same value that was entered when creating the contract, but is also editable. The selection will then also show the Insured, Reinsured or Retrocession field as appropriate.

Underwriters will then see the same values on sections as appropriate.

Changes to Historical Upload

Placements uploaded to the Archived Placements area of the platform will not include the Limits, Excesses, Premiums, or Deductibles if they have been completed on the upload spreadsheet. This is because of the changes in respect of the MRCv3 format mentioned above. A new spreadsheet without these fields will be available for use.

Note: All of the field changes mentioned above apply to the standard interface. Brokers won't see them in the Express Contract or Express Renewal screens.

Underwriters – Notify Non-Leader Facility Participants When (Co-)Leader Accepts Cancellations

When a Cancel Line or Cancel Contract (once bound) cancellation request has been accepted by the Leader or Co-Leader, all Non-Leader Facility participants will now receive an alert in the platform and a corresponding email informing them of the cancellation.

This will ensure that all participants on the Facility are made aware when a contract using the Facility has had a Cancel Line or Cancel Contract (once bound) correction completed.

Underwriters – Add Cancellation Transaction Log Entries for Non-Leader Facility Participants

When a Cancel Line or Cancel Contract (once bound) cancellation request is complete, Facility participants who are not Leaders of the Facility will now see Transaction Log entries relating to the cancellation.

This will ensure that all Non-Leader Facility participants can see the cancelled status when viewing the Transaction Log or the Transaction Log Export.

This also implements the addition of 'Subjectivity Removed' Transaction Log entries for Non-Leader Facility participants. All Underwriter(s) who had added Subjectivities will be able to see which subjectivities were removed when the contract becomes cancelled within the Transaction Log and Transaction Log Export.

Underwriters – Update Non-Leader Facility Written Lines When (Co-)Leader Accepts Cancellations

When a Cancel Line or Cancel Contract (once bound) cancellation request has been accepted by the Leader or Co-Leader, all Non-Leader Facility participants will now have their written lines updated to **0%**. This will also set the Panel Written line to **0%** for both the Broker and Underwriter view.

This will ensure that all participants on the Facility can see the correct written line % on a contract using the Facility, when it has had a Cancel Line or Cancel Contract (once bound) correction completed.