

February 2026 Release (3.3)

User Guide



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

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Brokers and Underwriters – Updates to the Amend Master Facility Process

There are a number of updates in this release that will improve the way the 'Amend Master Facility' process works, making the process more transparent, and ensuring that controls and versioning work as they should.

These changes will enable Brokers to have a better user experience when Amending Master Facilities, giving them more confidence that the outcome will be as required.

The key changes are listed below, and are explained in more detail in the full [Amend Master Facility guide](#), available in PPL Learning:

<u>Change</u>	<u>Outcome</u>
New/better controls around permitted actions	• More control over how/when Amendments mode is entered • Amendments mode to share the features and controls from C&R mode • Better feedback to users for invalid or unusual actions • Tighter definition of options available to users • Better handling of multiple edits to a single item • Enhanced list of changes that force the creation of a clone • More robust handling of changes to participation records • Improved visibility of amendments to Underwriters
Better version control	• Will now use the existing contract versioning mechanism • A new version is created when Amendments mode entered ◦ New version is deleted if the Amendment is discarded • When Amendment is completed without creating a clone, the new version will be the visible one • If a clone is created, the new version is moved to a new Contract record, leaving the original Contract record intact
Better controls in the process flow	• Screen locked down to prevent users navigating away and performing conflicting actions • 'Data ready' flags now removed on entry • Improved Contractual Role handling in response to changes • Clearer separation of pending amendments, making the process of discarding them cleaner • Stronger checking that mandatory requirements have been completed (selecting Data Ready on the Underwriters tab)
Improved visibility for Underwriters	• 'Request' records created for Underwriters once the amendment is completed • New Transaction Log entries visible to the Broker, noting the completion of an amendment • New Transaction Log entries visible to the Broker and appropriate Underwriters, when signing and closing a cloned Master Facility

Brokers and Underwriters – Underwriter Details Included When Generating Docs That Include Endorsements

When Brokers and Underwriters generate Endorsement documentation, the documents will display the most recent and up-to-date Underwriter information within the Security Details. The documents this affects are:

- MRCE + Agreement Parties
- Firm Order document, with the 'Include Endorsements' option set to 'Yes'.

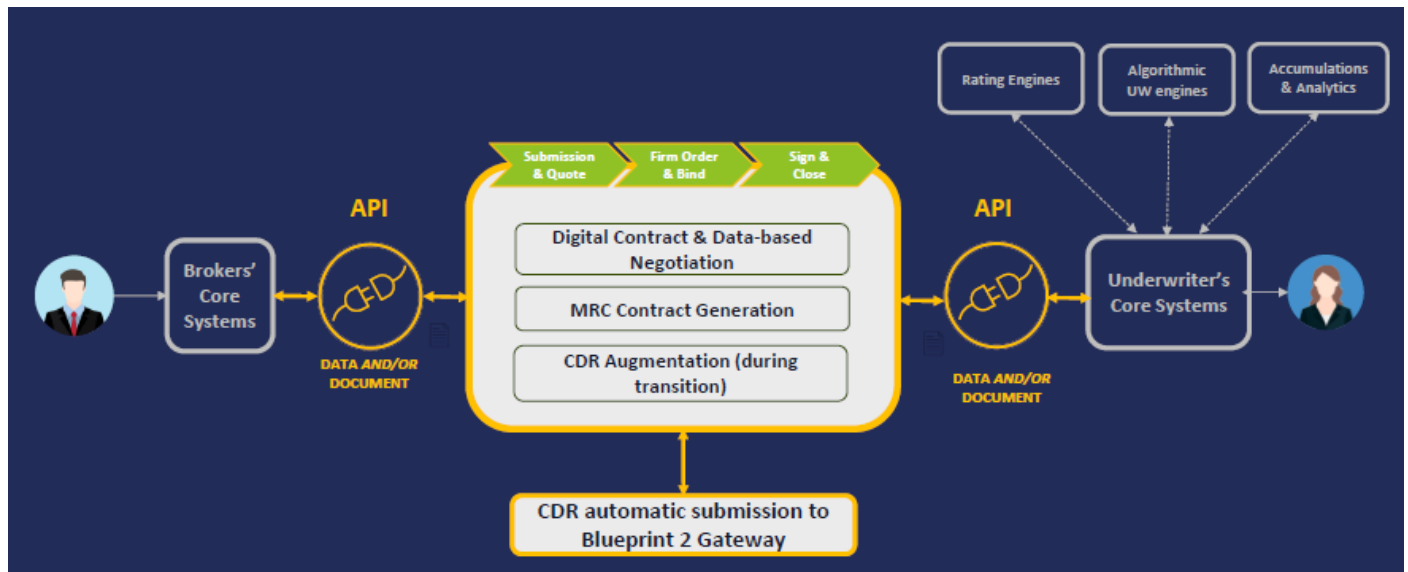
This means that the Underwriter information will be obtained from the latest negotiation of the linked Firm Order or Mid-Term Market Change participations, that correlate with the effective date of the Endorsement.

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 – Creating Placements with a single Contract record (with default values)

API Collection:	Placement API
API Endpoint(s):	{Env_URL}/Placements/{DomainAPI_Version}/placements

For brokers that want to experience a quicker start to place their client’s business, our Placement API collection is now able to create a placement with an “express” Contract record. This Contract record will allow Broker Users to get placing sooner with even fewer data points needed for data capture.

With fewer data points requiring completion, the Placing Platform will automatically populate “defaulted” data values in the Contract record, enabling Brokers that just want to get their proposals to Underwriters to support a build and/or quote stages of the placing process.

When supplying an additional field attribute, “*create_default_contract*” with a value of “Y,” in the Placement resource request, the Placing Platform will create a Placement record and automatically create a single Contract record, defaulting any omitted mandatory fields with pre-defined system default data values. As per the existing functionality, the Placement resource payload response message will show the Placement and Contract structures that are created.

The screenshot displays the Placing Platform interface for a user named 'PPL Test Team 1'. The main section is titled 'Any Client Proposal' and includes a sidebar with a list of proposals. The primary proposal, 'B999105081355675 - Any Client Proposal | v01 (Pending)', is selected. The main content area shows a form for this proposal, with tabs for 'Data', 'Documents', and 'Underwriters'. The 'Data' tab is active, displaying a table of fields and their values. A 'Draft' button is visible in the top right of the form area. At the bottom, there is a dashed box with a link to 'Browse or drop here' for uploading files.

Any Client Proposal 9991 05081355675 v01 (Pending) Draft	
1 Data	
Broker team	PPL Test Team 1
Unique market reference	B999105081355675
Placing broker	SDCBrokerUser One
Contract type	To be agreed
Broker code	9991
Contract reference	05081355675
Cover type	To be agreed
Contract description	Any Client Proposal
Class of business	
Line of business	
Product	
Period Duration	12
Period Unit	Month(s)
Region/Country	region
Region	To be agreed
Interest description	

Brokers API – Managing [Build and Quote] Submission Packs

API Collection:	Submission Pack API
API Endpoint(s):	{base_url}/submissionpack/v1/placements/{placementId}/submissionPacks?Type={"Type"}
API Method(s):	POST, GET by ID, DELETE

For Brokers that have expressed an interest in engaging with their Underwriters as early in the placing process as possible, brokers can now use the same Submission Pack API capabilities to manage the “Build” (a.k.a. “enquiry” or “pre-quote”) and “Quote” Submissions sent to Underwriters.

Brokers continue to benefit from a hybrid approach working between back-office systems and the Placing Platform, where system and user hand-offs are interchangeable: Broker organisations will be able to let their systems create the Submission Packs using data and documents held from their own back-office systems, before handing off to another Broker with access to Placing Platform UI to review any Submission Packs prior to sending to their Underwriters.

Any Client Proposal

Structure Pool Documents **Submissions** Messages Overview

Create new submission

+ Quote + Firm order + Endorsement + Share Additional Information

All submission packs

Name	Type	Sub-type	Status	Created on	Created by	Sent on	Sent by	# Submissions	Broker team
QuotePack - Lead/Contractual Underwriters	Quote		Draft	05/02/2026 08:34	SDCBrokerUser One	-	-	1	PPL Test Team 1
B999105081355675-Express Quote Pack	Quote	Enquiry	Sent	05/02/2026 08:15	SDCBrokerUser One	05/02/2026 08:15	SDCBrokerUser One	1	PPL Test Team 1

API Collection:	Placement API
Endpoint:	{Env_URL}/Placement/{DomainAPI_Version}/contracts/{contractId}/negotiations/{negotiationId}

- Minimum/Maximum Quoted Line Percentages.
- A choice of multiple-quoted Premium options, based upon specified preferences.
- Preferred Carrier Stamp(s) and percentage/amount splits when the Broker is ready to bind.
- Quote Response Document; and
- Quote Expiry Date.

Brokers and Underwriters API – Centralised Self-Actioned Notifications for Backoffice API Integration

API Collection:	Event API
Endpoint:	{Env_URL}/Event/{DomainAPI_Version}/notifications/{notificationId}

Following its pilot introduction in November 2025 for “technical” events for self-actioned Notifications supporting a Carrier’s firm order response or post-bind updates for their own back-office systems, this feature is extended for all broker-actioned and carrier-actioned engagements with underwriters and brokers, respectively.

These technical notifications do not interfere with business notifications that Brokers and Underwriters see using the “bell” icon in the upper-right corner of the Placing Platform UI. Those firms that use the Placing Platform’s Event-Driven Architecture can also subscribe to these “technical” notifications as and when they are ready to do so.

This feature is a stepping stone where firms are continually looking to leverage their own digital capabilities for the betterment of their users, but want the flexibility to let their users continue to use the Placing Platform UI until such time they are ready to work from within their own back-office system perform 2-way real-time data exchange keeping users within a single organisation’s own IT ecosystem. For example:

- **Brokers:**
 - When signing & close Contracts within the Placing Platform, broker back-office systems can trigger existing API features to retrieve structured risk data, bind/final signed data, and download the MRC Contract with Security Details.
- **Carriers:**
 - As soon as Underwriters bind Contracts or agree to Endorsements, carrier back-office systems receive a “technical” notification of the Underwriter’s action and can automate a sequence of API calls to download the structured data for “booking” the risk and commence downstream underwriting activities much earlier in the process.

Note: This feature will be enabled for **all** self-actioned Notifications for “Broker to Underwriter” engagements as well as “Underwriter to Broker” engagement. It will **not** cover system-driven Notifications such as “subjectivity expiring soon” messages or contract/submission reassignments among organisation teams.

Underwriters API – Receiving MRCv3 Structured Data in the Submission API Collection

API Collection:	Submission API
Endpoint:	{base_url}/submission/v1/submissions

Where Brokers have subscribed to PPL’s Contract Builder tool or are using PPL’s Market APIs and supply additional MRCv3 structured data, Carriers will automatically receive the additional structured data within the Submission API collection. This will include the following information:

- Insured/Cedent/Retrocedent Address Information.
- Treaty/Facultative indicators.
- Policy Attachment Points.
- Inception/Expiry Time and Time zones.
- Cover Operating and Claims Agreement Basis.
- Multiple Settlement Details.
- Policyholder Risk and Industrial Sector classifications.
- Additional Parties, such as Loss Payee, Claims Expert and Surplus Lines Broker and other Brokers.
- Brokerage, Commission, Discounts, Fees, and other Deductions.
- Applicable Tax information.
- Additional Premium and instalments.

Underwriters will be able to see an “advisory” label in their “data” tab in the Placing Platform UI, identifying that additional structured data is available, and accessible via Market APIs.

Note: There is a reliance upon the PPL Broker clients to start providing this information so that integrated Carrier clients can benefit from its availability.