

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

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Brokers – Upload Documents in the Background

As a Broker, when you are uploading documents to a Placement, Contract, Section, Programme or Endorsement, the documents will now upload in the background, enabling you to continue with your work.

1. On the Structure tab, select the part of the placement you want to add documents to.
2. On the right of the screen select the **Documents** tab, then select the **Browse or drop here** area.
3. In Windows Explorer, select the documents that you want to upload.
4. Complete the **Upload file details** screen:

Upload file details

This will upload the MRC as a read-only file and converted to pdf, you will need to enter the contract data manually.

Description	Document type	File name
Client correspondence 1	Document: Client Correspondence	 Client Correspondence.pdf
2024 Contract	Contract	 MRC Property v1.pdf

Cancel

Upload

5. Select **Upload**. The documents will display the 'uploading' icons and you will be able to work on other parts of the Placement whilst the upload is completing:

PPL

NYY UK Marine Risks-SG2

3

IB

Iain-SG2 Banks
Placing Broker Team Lead and Approver

Team

GBP Marine Liverpool Brokers-SG2

Placements / Property

Property

Team
GBP Marine Liverpool Brokers-SG2

Placement owner
Iain-SG2 Banks

Structure

Pool

Documents

Submissions

Messages

Overview

Property

...

C B1111578357SGH53 - Property | v01 (Pending)

...

Underwriters

Data

Documents

1111 578357sgH53 | v01 (Pending)

Draft

Property

Contract documents

File Name	Document Type	Description
 MRC Property v1.pdf	Contract 	2024 Contract 

Supporting documents

File Name	Document Type	Description
 Client Correspondence.pdf	Document: Client Correspondence	Client correspondence 1 

 Browse or drop here .docx and .doc, .rtf and .pdf file to create a contract
(only one file at a time)

 Browse or drop here files to add supporting documents

The document **File Names** will remain greyed out until the upload is complete, after which you can click them to view the documents.

Brokers – Express Contract Updates

The following updates all relate to the Express Contract flow, which provides a simpler, linear flow for creating single contracts with up to six sections.

Pull a Draft Contract into the Express Contract Flow

If you have created a contract in the standard user interface, you now have the option to pull that contract into the Express Contract flow if it is at **Draft** status. This enables you to use the features of the Express flow to complete and send the contract to Underwriters.

1. On the Structure tab, select the required Contract.
2. Select the ellipsis menu and choose **Continue as Express Contract**.

The screenshot displays the Placing Platform interface for a contract titled 'Property' (ID: B1111578357SGH53 - Property | v01 (Pending)). The 'Structure' tab is active, showing a list of contracts. A dropdown menu is open for the selected contract, with the option 'Continue as Express Contract' highlighted in green. The right-hand side of the interface shows the 'Documents' tab, which lists 'Contract documents' and 'Supporting documents'. The 'Contract documents' section includes a table with columns for File Name, Document Type, and Description. The 'Supporting documents' section also includes a table with the same columns. The interface is for the user 'Iain-SG2 Banks' (Placing Broker Team Lead and Approver) and the team 'GBP Marine Liverpool Brokers-SG2'.

File Name	Document Type	Description
MRC Property v1.pdf	Contract	2024 Contract

File Name	Document Type	Description
File Note.pdf	Document: File Note	File Note 1
Loss Report.pdf	Report: Loss History	Loss Report 2024
Client Correspondence.pdf	Document: Client Correspondence	Client correspondence 1

The Contract will appear in the Express Contract flow, at the appropriate stage. For instance, if any required data was still to be entered, the Express flow will open at the **Contract details** stage, but if all the contract data is valid, it will open at the **Select documents** stage.

Property | Express Contract

Exit and view placement

1 Property

2 578357sgH53 - Property

3 Select documents

Contract Level Documents

Description	Document type	File name (4)	Actions
2024 Contract	Contract	MRC Property v1 .pdf	...
File Note 1	Document: File Note	File Note.pdf	...
Loss Report 2024	Report: Loss History	Loss Report.pdf	...
Client correspondence 1	Document: Client Correspond...	Client Correspondence.pdf	...

Browse or drop here files to add supporting documents

If you continue and send pack to Underwriter(s) via the Express Flow, all documents listed will be sent to all applicable Underwriter(s). If you wish to amend document selection, please exit the Express flow and send pack via the Submission Builder.

Next step

4 Underwriters

5 Review submission

- Continue working through the Contract by adding any further documents, then completing the **Underwriters** and **Review submission** stages as required.

Note: If you have added Underwriters in the standard user interface before pulling the contract into the Express Contract interface, the details will come over. However, if you have created **subpanels** (for vertical/Bipar contracts), these will not appear as the Express Contract flow does not have provision for them.

We therefore recommend that contracts requiring subpanels are created in the standard user interface.

Include Placement/ Programme/Section Level Documents on Review Submission Step

If you have created a contract in the standard user interface and have added documents at Programme, Placement or Section level, when choosing the **Continue as Express Contract** option, these documents will now appear on the **Documents** and **Review Submission** steps of the Express flow.

This enables you to see all the documents uploaded in the standard user interface before sending the pack to Underwriters.

Select Underwriters to Include in the Express Contract Submission Pack

On the **Review Submission** step of the Express Contract flow, Brokers can now select which Underwriters the submission is to go to, rather than having to send the pack to all the Underwriters at the same time.

In the example below, the Broker has deselected the checkboxes at the left of the Underwriters that they don't want the submission pack to go to yet. They would then create and send a further submission pack to the remaining Underwriters when required.

Review submission

* Pack name
(Required)

B1111578357sgh53 - Firm order pack

* General message to all underwriters
(Required)

Please review and accept

Add approver

Property

578357sgh53 - Property

Description	Document type	File name (4)
2024 Contract	Contract	V1.0 MRC Property v1.pdf
Client correspondence 1	Document: Client Correspondence	V1.0 Client Correspondence.pdf
Loss Report 2024	Report: Loss History	V1.0 Loss Report.pdf
File Note 1	Document: File Note	V1.0 File Note.pdf

If you continue and send pack to Underwriter(s) via the Express Flow, all documents listed will be sent to all applicable Underwriter(s). If you wish to amend document selection, please exit the Express flow and send pack via the Submission Builder.

Of Whole 100%

	Underwriters	Underwriter Company	Roles FO roles	Stamps	Proposed	Message
☒	JK-SG2 Rowling	HG Marine Risks-SG2	★ ⚓	Lloyd's Underwriter Syndicate ...	50	Add
☐	Bernardine-SG2 Evaristo	BH UK Marine Risks-SG2	⚓ ²	Lloyd's Underwriter Syndicate ...	30	Add
☐	Charles-SG2 Dickens	B Property Risks-SG2		Lloyd's Insurance Company S....	20	Add

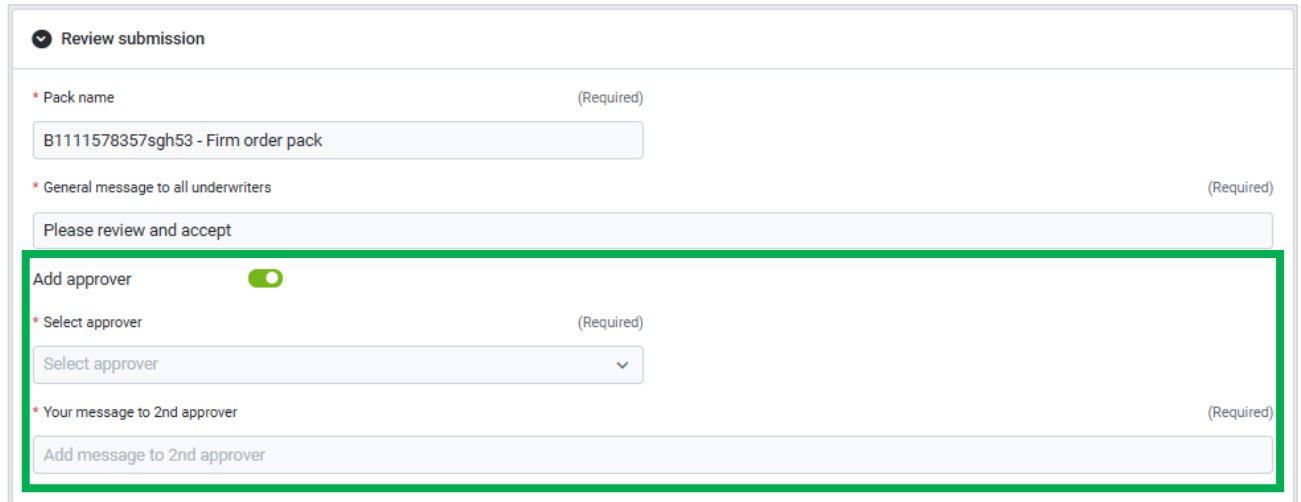
This change gives Brokers the same flexibility they have when using the standard user interface, and enables them to send the Express Contract to just the Lead Underwriter first if required.

Option to Select a Second Approver

The Express Contract flow now includes the option to select a Second Approver, depending on your role. Users with a role of 'Placing Broker (Monitored)' are required to select an approver, but the option won't be displayed for those with a role of 'Broker Admin (with Markets)'.

To do this:

1. On the **Review submission** step, select the **Add approver** toggle as shown below:



The screenshot shows the 'Review submission' form with the following fields and controls:

- Pack name** (Required): B1111578357sgh53 - Firm order pack
- General message to all underwriters** (Required): Please review and accept
- Add approver** toggle: Turned on (green)
- Select approver** (Required): A dropdown menu with the text 'Select approver' and a downward arrow.
- Your message to 2nd approver** (Required): A text input field with the placeholder 'Add message to 2nd approver'.

A green rectangular box highlights the 'Add approver' toggle, the 'Select approver' dropdown, and the 'Your message to 2nd approver' text field.

The **Select approver** and **Your message to 2nd approver** fields will appear.

2. Use the dropdown to select the second approver and add your message to them.
3. Complete the remaining fields in the Review submission step and select **Send for approval**.
The request will go to the second approver, and if approved will then be sent to the Underwriter(s).

This enables Brokers to select an approver without having to exit to the standard user interface.