

September 2025 Release (3.1)

User Guide



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

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Brokers - New Broker Dashboard

The Broker Dashboard has been redesigned to help you find and access your work more quickly. The image below highlights the main features of the new dashboard.

The screenshot shows the 'Placements' tab of the Broker Dashboard. At the top, there's a header with the PPL logo, the text 'NY Y UK Marine Risks-SAD1', and a team dropdown 'Team NY Y Marine Southampton Brokers-SAD1'. Below the header, there's a filter panel with 'Type: Contracts', 'Show My Contracts: No', 'Show Completed: Yes', '+ Add Filter', and 'Clear Filters'. A callout box points to this panel, stating: 'Filter options are all grouped here. Filters selected are then displayed below the drop-downs and can be removed as required.' Below the filter panel, there's a table with columns: Client, UMR, Contract, Owner, Inception date, and Status. Each column has a search field below its header. Callout boxes highlight these search fields: 'Each column can be searched using at least 2 characters.' for Client, UMR, and Contract; and 'The Owner column can be searched using at least 1 character.' for Owner. The table lists various contracts, including 'PNG-87308', 'MR_XPR809A2', 'AAA Holdings Limited', 'PNG-79650', 'RedressProgramme', '21_02', 'MRC Version Checker', and 'OG'. At the bottom, there's a footer with 'Showing 21 to 40 of 117 entries' and a pagination bar.

Individual Column Search

Each column on the new Broker Dashboard has a search field under the column heading, enabling Brokers to rapidly search for or select criteria for that column. When typing in your criteria, you need to enter at least two characters before pressing **Enter** on the keyboard. The **Owner** column only requires one character.

This close-up shows the search fields for the 'Contract' and 'Owner' columns. The 'Contract' search field is labeled 'Search by contract' and has a magnifying glass icon. The 'Owner' search field is labeled 'Ted-SAD1 Hughes' and has a dropdown arrow.

The Dashboard will display the appropriate requests and the chosen criteria will appear in the Filter panel, as shown below.

This screenshot shows the Filter panel with the following criteria: 'Type: Contracts', 'Show My Contracts: No', 'Show Completed: Yes', '+ Add Filter', and 'Clear Filters'. Below these, there's a green-bordered box containing 'Owner: Ted-SAD1 Hughes' and 'Inception Date: 03/07/2025 - 03/07/2025', both with close buttons (X).

Add New Filter

1. On the Broker Dashboard, select the **Add Filter** button.
2. In the Apply Filters screen, enter the criteria for the filter and select **Apply Filters**.
The Dashboard will display the appropriate items and the chosen criteria will appear in the Filter panel, as shown below:

Type: Contracts ▾ Show My Contracts: No ▾ Show Completed: Yes ▾ + Add Filter Clear Filters
 Owner: Alexander-SAD1 Dumas × Inception Date: 01/06/2025 - 01/07/2025 ×

Edit Applied Filter

Applied filters can be edited in the ways shown below:

- Select **Add Filter** and make the required edits to the filter fields. Once complete, select **Apply Filters**.
- In the Filter panel, select the 'x' for an applied filter to remove it.
- Select **Clear filters** to remove all of the applied filters. This button is also available in the Apply Filters screen.

Note: Dashboard filters and views are 'sticky' and will remain applied when you exit and return to the dashboard.

Apply Filters ×

Filter table data and apply filters

Client

UMR

Contract

Owner

Inception Date

Status

Team

Declarations

Clear Filters Apply Filters

Reassign Items

Placements, Contracts and Programmes can easily be reassigned from the Broker Dashboard if a colleague needs to become the Owner for it. You can still work on items that you are not the Owner of if you are in the team it is reassigned to, but you will be doing so 'on behalf of' the Owner.

To reassign items:

1. On your dashboard, use the search or filter options to find the items you wish to reassign.
2. On the left of the screen, use the checkboxes to select the required items.
3. On the right of the screen, select **Reassign**.
4. In the panel that appears, select the required **Branch**, **Team** and **User** to reassign to.
5. Select **Reassign**. The item(s) will be reassigned to that person and they will receive a notification of the reassignment.

Note: When reassigning multiple items, the underlying process has been changed to ensure that users are able to continue working, with the reassignments happening in the background. Clearer messaging will also appear to confirm the success of the reassignment, and whether there are any issues.

Brokers – DIGITAL CONTRACT USERS ONLY – New Create Contract Option

If your organisation is using our Digital Contract tool, once the placement has been created, the redesigned standard interface screen will appear with the structure on the left and the details on the right. At Placement level, a new **Create Contract** button is available to provide a simpler way for Brokers to enter the contract data. This also makes it easier to create further contracts as part of the same placement.

1. Select **Create Contract**.
2. The right of the screen will change to display the **Enter contract details** fields.

The screenshot shows the PPL interface for a placement named 'GBP UK Marine Risks-SG2'. The left sidebar shows the 'Property' tab selected, with a 'Create Contract' button. The main area is divided into two sections: 'Property' on the left and 'Enter contract details' on the right. The 'Property' section shows a message 'This placement is currently empty' and a 'Create Contract' button. The 'Enter contract details' section contains a 'Contract details' form with the following fields:

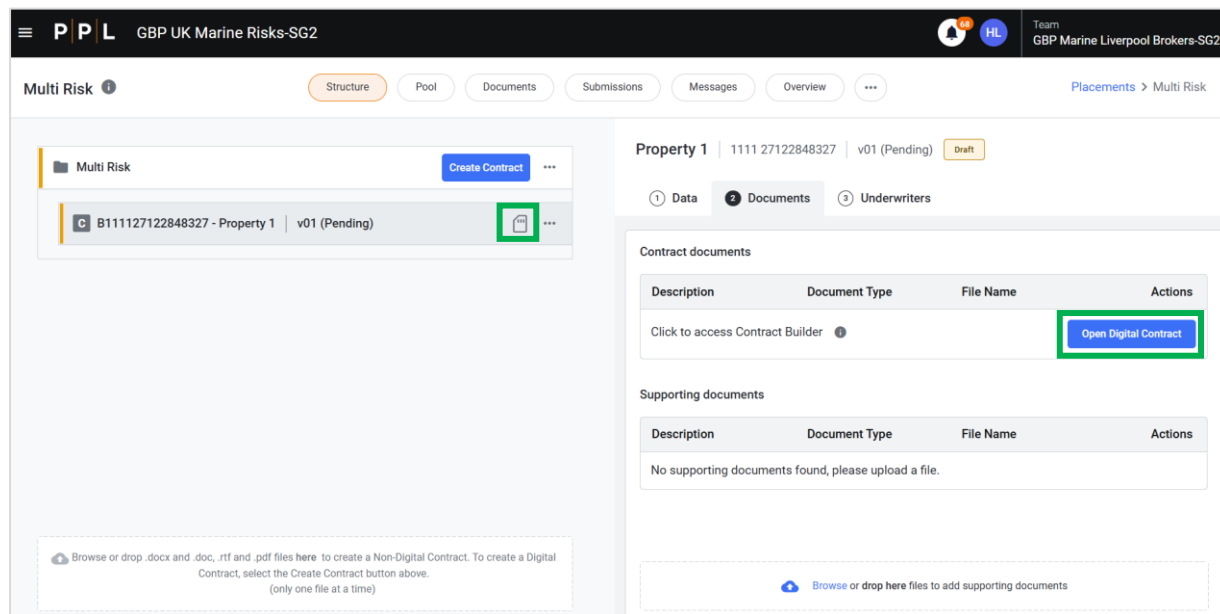
- Broker team:** GBP Marine London Brokers-SG2
- Digital Template:** (empty)
- Unique market reference:** B0000
- Placing broker:** Harper-SG2 Lee
- Contract type:** Select contract type (dropdown)
- * Broker code (Required):** Select Broker Code (dropdown)
- * Contract reference (Required):** (empty) with a 'Generate Reference' button
- Cover type:** Select cover type (dropdown)
- * Contract description (Required):** (empty)

A 'Digital Contract' toggle is visible in the top right of the 'Enter contract details' section.

3. Scroll down and complete the fields as required.
4. Select the **Create Contract** button. If any of the required fields haven't been completed, the screen will scroll to that point for you.
5. Continue in the normal way by completing the Documents and Underwriters tabs as required.

Note: The **Digital Contract** toggle will be enabled if your organisation uses our Template and Contract Builder tools. This enables users to create the contract document from a chosen template using the data entered into the fields, instead of having to create it in Word and upload to PPL. This data can then be updated and synched from the contract builder or the PPL screens.

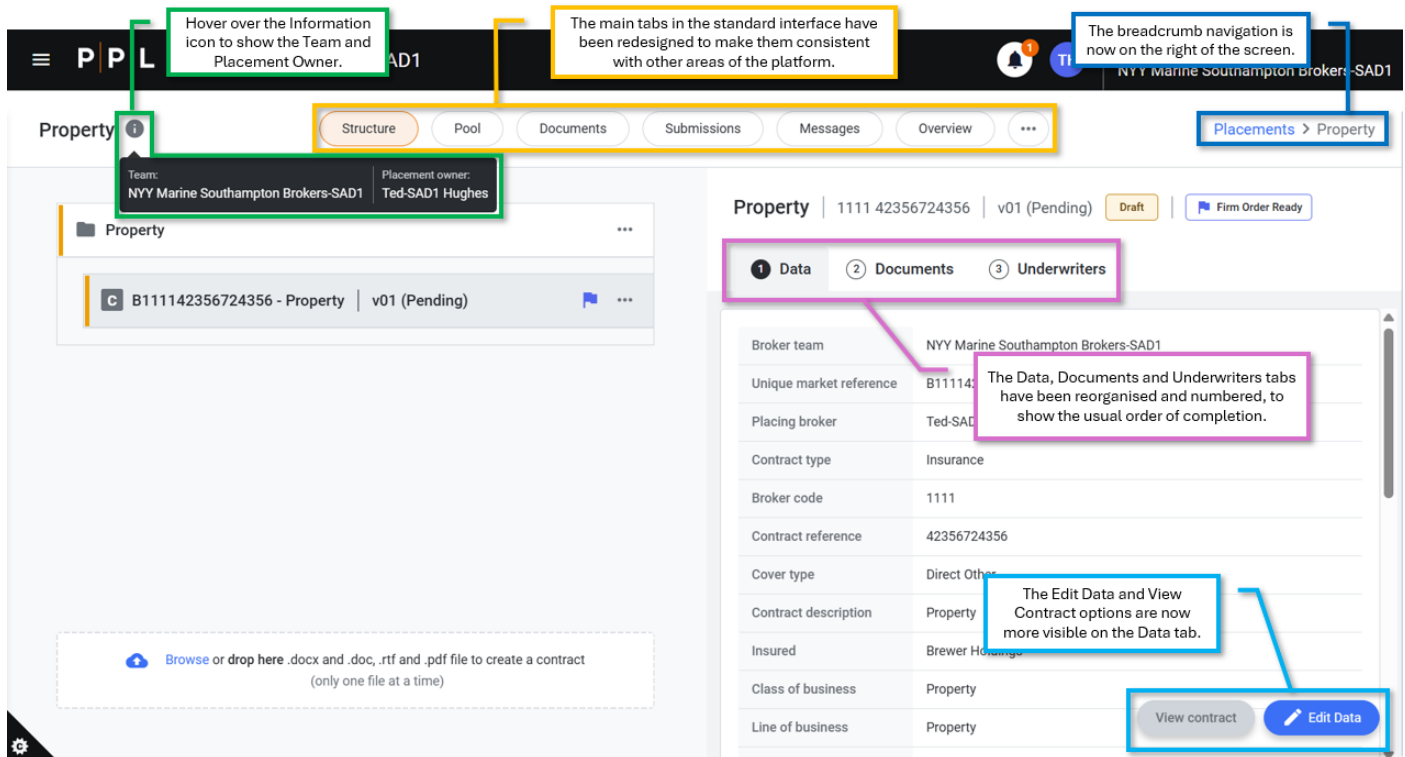
Digital Contracts will be indicated by the  icon in the Structure. With the Contract selected, on the **Documents** tab on the right of the screen, the **Contract documents** area will display the **Open Digital Contract** button, as shown in the image below. This will take you into the Contract Builder screens where you can update and sync the data between the contract and the PPL screens.



The PDF of the contract will be available once the Submission Pack has been created.

Brokers - Redesign of Placement Information Screens

The screens in the standard interface now include a number of improvements to make navigating through them easier. These changes are shown below:



- **Team and Placement Owner**
Hover over the information icon at the top left of the screen ⓘ to view the Team and Placement Owner for the selected placement.
- **New Main Tabs**
The tabs at the top of the screen (Structure, Pool etc.) have been redesigned and repositioned to make them clearer and more consistent with other areas of the platform.
- **Breadcrumb navigation**
'Breadcrumbs' indicate the current screen's position in the platform's structure can be used to navigate back to screens you've visited. This is now available at the top right of the screen.
- **Data, Documents and Underwriters tabs**
The main tabs on the right of the screen have been reordered and numbered to make the navigation flow clearer.
- **Edit Data and View Contract**
New buttons at the bottom of the Data tab make it faster for you to edit the data fields and view the contract document.

Note: The changes detailed above will appear for Placements and Master Facilities.

Brokers - Underwriters Tab – Save Feature

The redesigned Underwriters tab now includes a **Save** button that will appear when you are making changes to the Underwriter information. This replaces the autosave feature that was used previously, as this could cause slower performance for contracts with multiple Underwriters.

The screenshot displays the Placing Platform interface for a contract titled "NY Y UK Marine Risks-SAD1". The top navigation bar includes the P|P|L logo, the contract name, and a "Team" dropdown showing "NY Y Marine Southampton Brokers-SAD1". The main content area is divided into a sidebar and a main panel. The sidebar shows a "Property" section with a list of items, including "B111142356724356 - Property | v01 (Pending)". The main panel has tabs for "Data", "Documents", and "Underwriters". The "Underwriters" tab is active, showing a list of underwriters. The first underwriter is "HG Marine Risks-SAD1 - JK-SAD1 Rowling" with a "Proposed" value of "100%". The second underwriter is "B Aviation Risks-SAD1 - Charles-SAD1 Dickens" with a "Proposed" value of "60%". The third underwriter is "BH UK Marine Risks-SAD1 - Bernadine-SAD1 Evaristo". A "Save" button is highlighted in the bottom right corner of the main panel.

Brokers and Underwriters - Corrections - Panel Change Enhancements

Panel Change Restrictions Removed for Brokers

Prior to this change being implemented, the Panel Change feature restricted Brokers to only changing Underwriters who didn't have a contractual role (Slip Lead, Bureau Lead etc.).

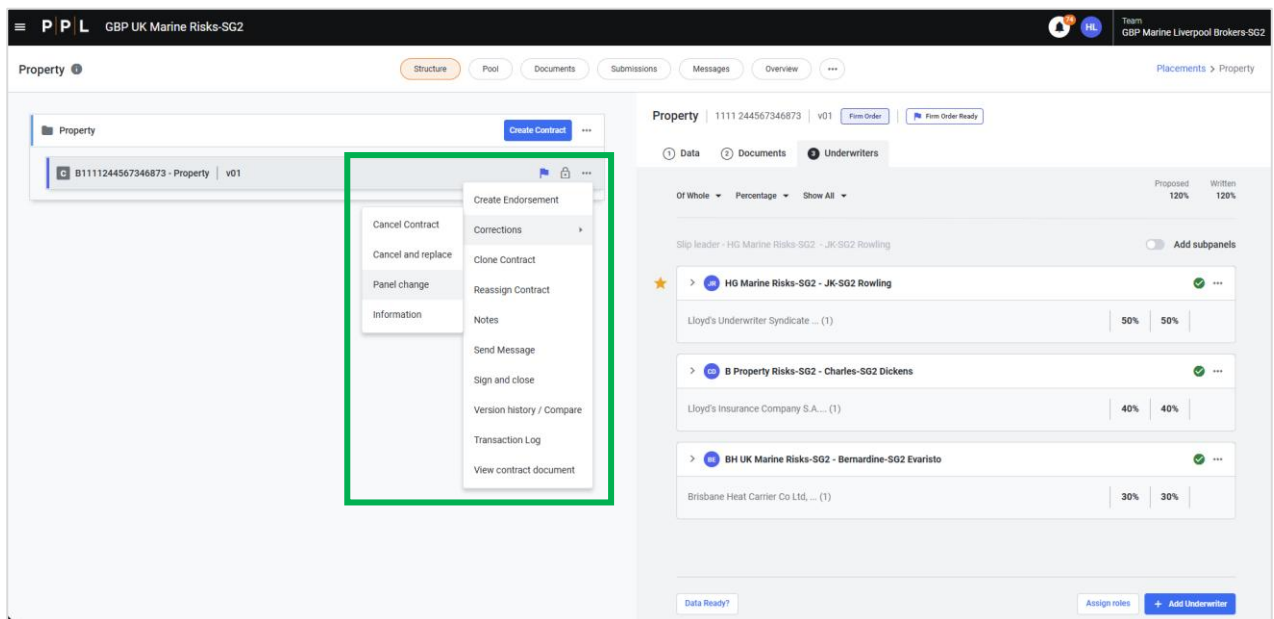
The changes that could be made to both on-platform and off-platform Underwriters were:

- The Broker can toggle between 'Fixed' and 'Range' options on Underwriters' proposed lines, and update the proposed line values based on the option selected.
- The Broker can add a new stamp to an Underwriter's line.
- The Broker can Update an existing stamp.
- The Broker can change the position of an Underwriter by selecting the ellipsis menu on that Underwriter's line and choosing **Move**.

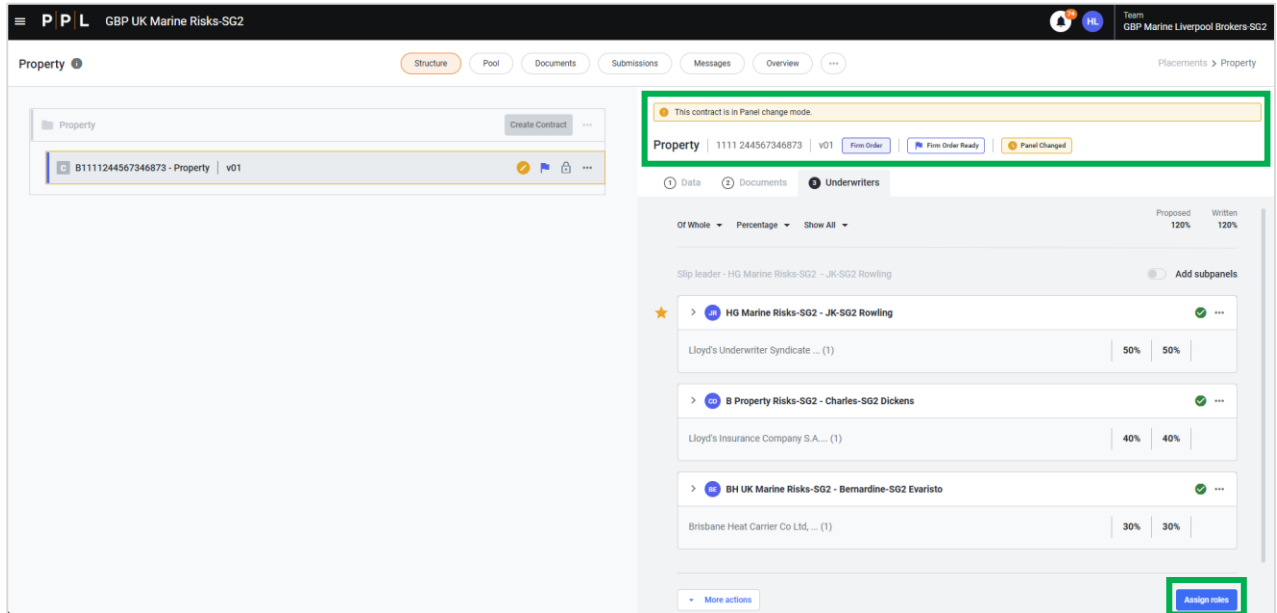
The change in this release now enables Brokers to use Panel Change to make changes to Underwriters who are bound with a contractual role. It will also allow the allocation of unassigned contractual roles

In the example below, the Broker submitted the contract to Underwriters without adding stamps or risk codes. The Underwriters have responded, with the Slip Leader adding a Lloyd's stamp, the second Underwriter adding an LIC stamp and the third Underwriter responding with a stamp that has no contractual role. This scenario creates a situation where the Slip Leader is unable to add risk codes for the Lloyd's stamp, as they don't yet have the role of 'Lloyd's Lead'.

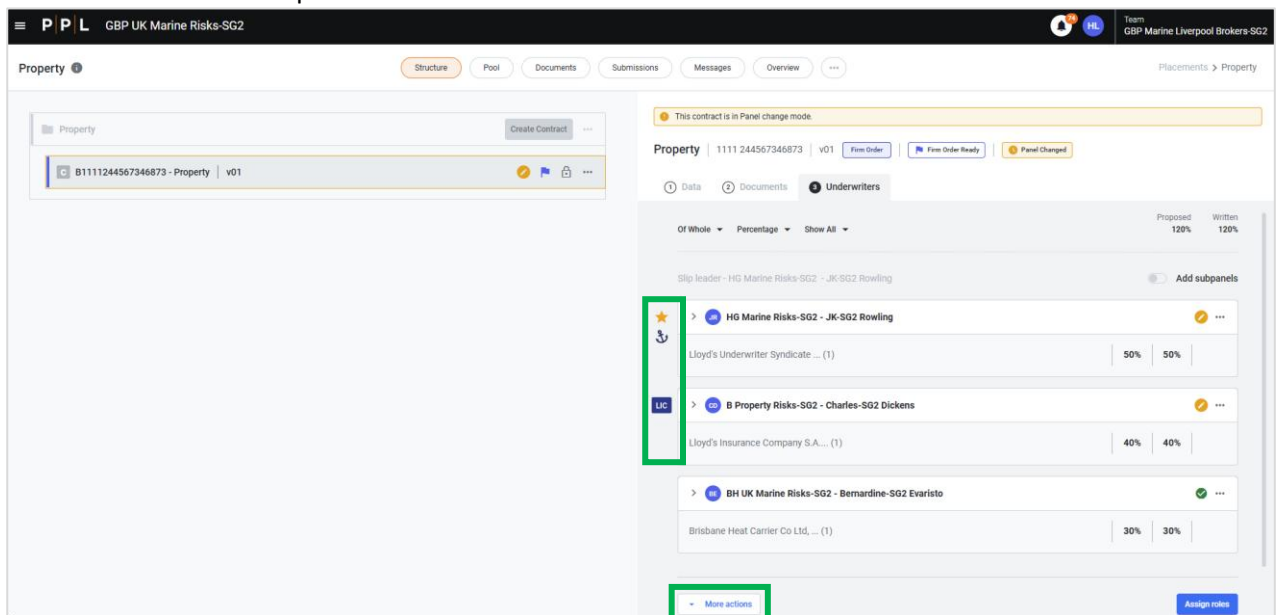
1. On the **Structure** tab, select the ellipsis menu for the contract to be corrected. Then select **Corrections** and **Panel Change**. The contract will now be in Panel Change mode.



- On the **Underwriters** tab, the stamps selected by the Underwriters now appear. Select **Assign Roles**.



- Any roles that were not assigned, or were assigned to an underwriter that was not bound or had an unresolved request (this can include slip/section leader) will now be applied, as indicated by the icons to the left of each Bureau stamp.



Select **More actions**.

- Select **Submit correction to Underwriter**. The New Correction Submission screen will be displayed.

- On the **Select Underwriters** tab, the Underwriters whose roles have changed will be automatically selected, and any Underwriters not affected by the Panel Change will be unavailable for selection.

The screenshot shows the 'New Correction Submission' interface. The 'Select Underwriters' tab is active. On the left, there's a sidebar with 'Property' and 'v01'. The main area shows a list of underwriters with checkboxes for selection. A green box highlights the 'Select All Underwriters' checkbox and the underwriter list.

Underwriter	Percentage	Selected
JB HG Marine Risks-SG2 - JK-SG2 Rowling	50%	☒
CD B Property Risks-SG2 - Charles-SG2 Dickens	40%	☒
BE BH UK Marine Risks-SG2 - Bernardine-SG2 Evaristo	30%	☐

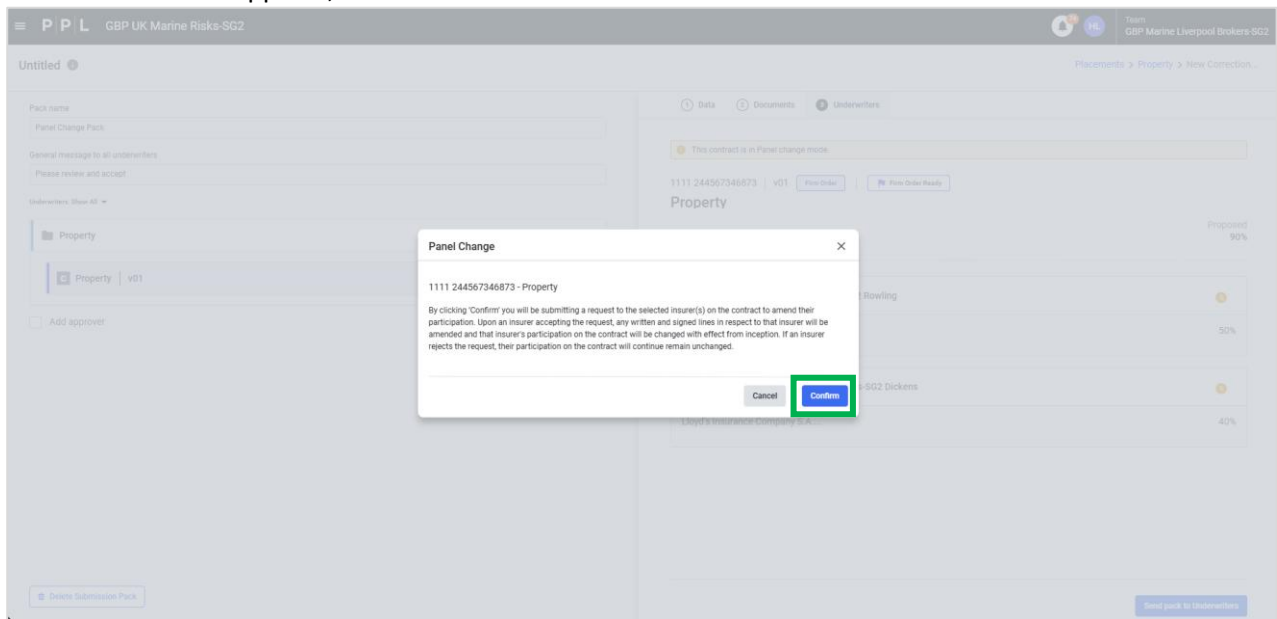
Select the **Prepare Pack** tab.

- Select **Create pack for review**. Enter the **Pack name** and the **General message to all Underwriters**.

The screenshot shows the 'Untitled' interface. The 'Prepare Pack' tab is active. On the left, there's a sidebar with 'Property' and 'v01'. The main area shows a form for creating a pack. A green box highlights the 'Pack name' field and the 'General message to all underwriters' field. Another green box highlights the 'Send pack to Underwriters' button.

Select **Send pack to Underwriters**.

7. On the screen that appears, check the information and select **Confirm**.



8. The **Structure** tab will now be displayed. Select the **Overview** tab – the status of both the Bureau Underwriters changed in this example will now be 'Panel Changed'. The Underwriter(s) unaffected by the panel change will still have the 'Accepted' status.

	Status	Quoted	Proposed	Written line	Signed line
244567346873 - Property v01	Change Requested	-	120%	120%	-
HG Marine Risks-SG2 - JK-SG2 Rowling	Panel Changed	-	50%	50%	-
B Property Risks-SG2 - Charles-SG2 Dickens	Panel Changed	-	40%	40%	-
BH UK Marine Risks-SG2 - Bernardine-SG2 Evaristo	Accepted	-	30%	30%	-

Note: There will still be some scenarios where Panel Change cannot be used:

- Where an Underwriter is not bound, which can include when there is an unresolved Firm Order request.
- Where the Broker is trying to change the stamp to one that is not related to the Underwriter's bound contractual role.
- Where the Underwriter's line being changed is part of a Facility panel.
- Where the Underwriter has more than one stamp applied and the panel change action (e.g. deleting one of the stamps) would leave the Underwriter without a stamp relating to an already bound contractual role.

Panel Changes Only Sent to Affected Underwriters

Panel Change requests will now only be sent to the Underwriters that are impacted by the change, rather than all of the Underwriters. For instance, if as part of the Panel Change an Underwriter is allocated a new Lead role, any following Underwriters with that stamp type will be included in the Panel Change. This will advise them of the new Lead and provide them with a chance to amend their line, should they wish to do so.

This will help to reduce unnecessary notifications being sent to Underwriters.

Note: If an Underwriter rejects the panel change request, their participation will revert back to the original position. Rejecting a Panel Change advising of a new Lloyd's Leader will not stop the Lloyd's Leader accepting the role.

Note: If you decide to discard the Panel Change before sending it to Underwriters, all Underwriter information will revert to its previous state.

Underwriters – Responding to Panel Change Requests

Underwriters will receive a notification in the platform and an email informing them of the panel change request.

1. On the Underwriter Dashboard, select the **Corrections** tile.
2. Select the required correction. The **Sub-Type** column will show 'Panel Change'.
3. Select the **Response** tab. Underwriters that have now had a Bureau contractual role assigned to them will see this here.

The screenshot displays the Placing Platform interface for a 'Property' risk. The left sidebar shows a list of requests, with the selected one being 'B1111244567346873 - Property | v01'. The main content area is titled 'Response' and shows details for the 'Responsible Underwriter' (HG Marine Risks-SG2 - JK-SG2 Rowling). The 'Original Proposed' dropdown is set to 'Original Proposed'. Below this, there are two buttons: 'Slip Leader' (highlighted with a green box) and 'Decline role'. The 'Written line basis' section shows 'Percentage of Whole' with a value of 50%. The 'Proposed line' section shows '50 %'. The 'Total written line' section shows '50 %'. The 'Permitted territory' section is currently empty. The 'Proposed Stamps' section shows a stamp for 'Lloyd's Underwriter Syndicate No. 4321 HGL, London, England-SG2' with a value of 50%.

- In this example, the **Lloyd's Leader** role has been assigned to the Underwriter in the panel change process. This now enables them to add the required **risk codes**.

- Once the risk codes have been added, scroll to the bottom of the Response tab. Select **Accept** from the dropdown field and then select **Save Response**.
- On the Select and send response tab, select the contract then select **Send response**.
- Read the information that appears and select **Confirm**.

The other Underwriters on the contract will be informed of the Leader's agreement.

Brokers – Sign and Close After Panel Change

Once the Underwriters affected by the panel change have confirmed their acceptance, the Broker will be able to sign and close the contract.

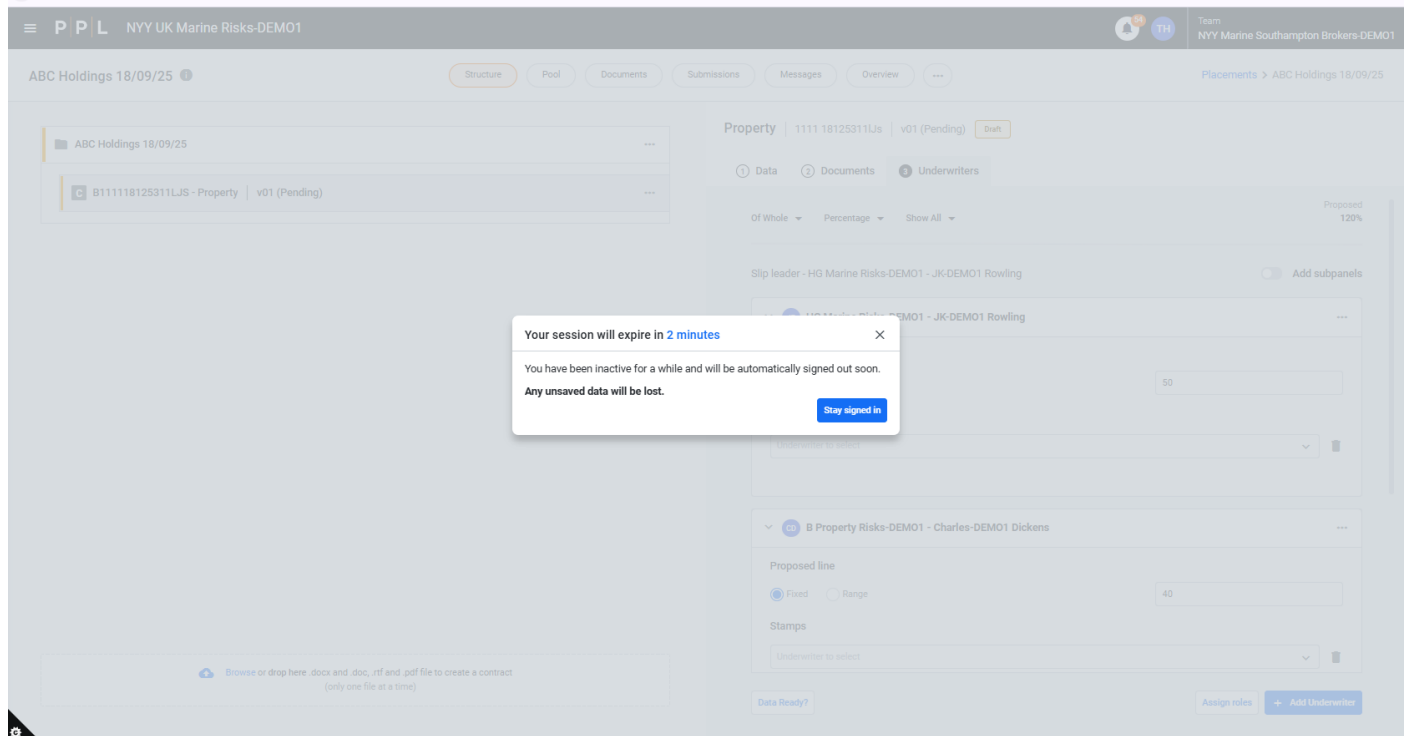
- Select the **Overview** tab for the contract. In this example, the two Underwriters that were part of the panel change correction now have a status of **'Accepted'**.

Property	Status	Quoted	Proposed	Written line	Signed line
244567346873 - Property v01	Firm Order	-	120%	120%	-
JR HG Marine Risks-SG2 - JK-SG2 Rowling	Accepted	-	50%	50%	-
CD B Property Risks-SG2 - Charles-SG2 Dickens	Accepted	-	40%	40%	-
BE BH UK Marine Risks-SG2 - Bernardine-SG2 Evaristo	Accepted	-	30%	30%	-

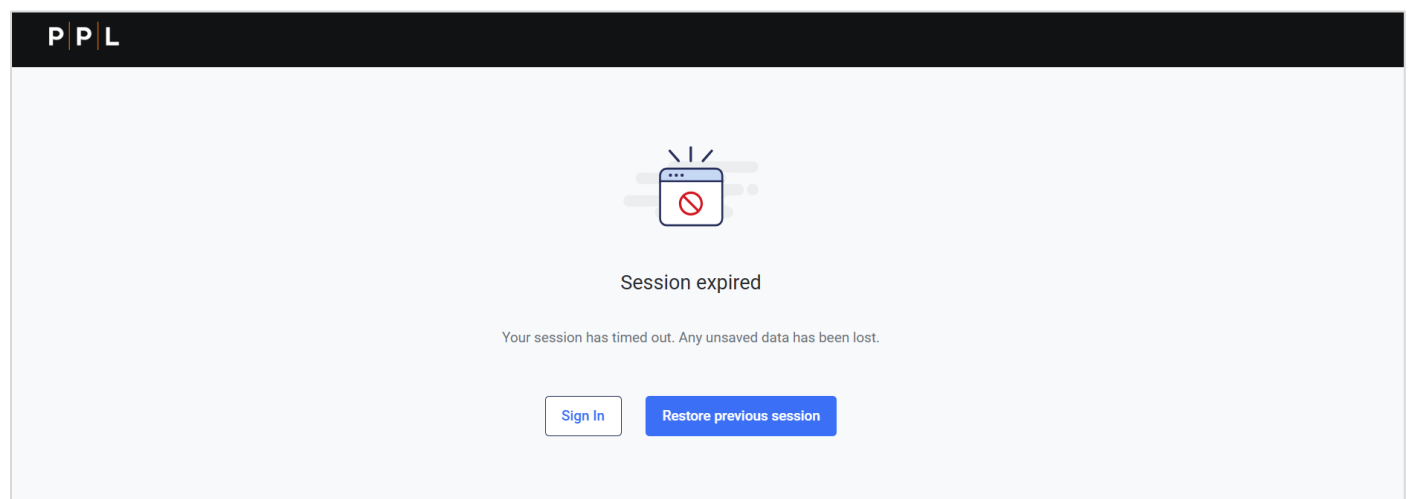
- Sign and close the contract in the usual way.

Brokers and Underwriters – Timeout Message Improvement

When a PPL session has been left inactive, the platform timeout will be triggered. This will provide a 5 minute countdown before your session expires. Selecting the **Stay signed in** button will return you to the screen, with any unsaved data still there.



Once the countdown reaches zero, the screen will display the **'Session expired'** message, giving users the option to **Sign In** to a new session or **Restore previous session**. Any previously unsaved data will have been lost.

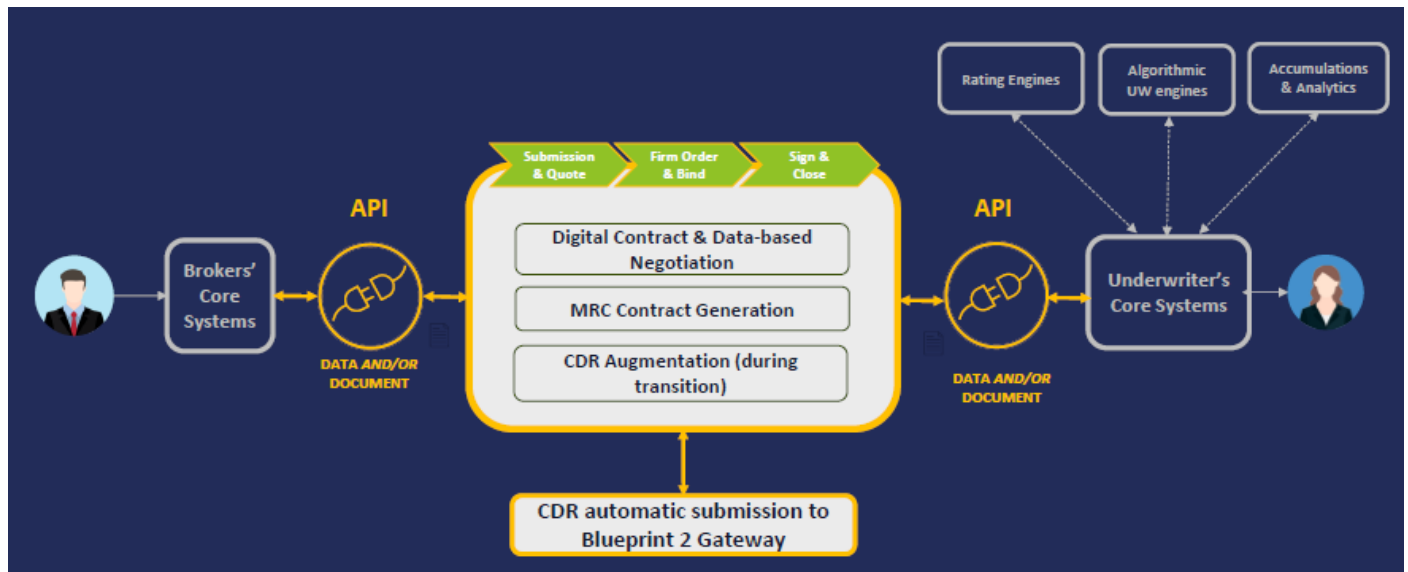


API Updates

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 – Adding MRCv3 data fields to Contract and Section API Resources

API Collection: Placements API

Brokers will be able to supply additional MRCv3 data structures to the PPL platform primarily for users subscribing to PPL's **Contract Builder** tool. This further reduces the need to re-key data into the platform, which also helps to reduce errors between PPL data and MRC content. These additional fields will be available for Brokers when editing their MRC contract using the Contract Builder.

Brokers API – Managing (Firm Order) Submission Packs

API Collection: Submission Pack API

Following on from the ability to add Underwriters and proposed lines and contractual stamp information, brokers can now use appended API capability to create, delete and send Firm Order Submissions to Underwriters.

Brokers will benefit from the same processes with APIs as they currently do using the PPL platform's user interface, including the ability to send general messages and personalised messages to specified underwriters.

Broker firms will be able to benefit from a hybrid approach between back-office systems and PPL, where system and user hand-offs are interchangeable. For example, broker organisations will be able to let their systems create the Submission Packs using their own back-office systems, before handing off to another Broker with access to PPL to review the same Submission Pack for a final time prior to sending the Firm Order Submission Pack to Underwriters.

P | P | L

NYY UK Marine Risks-DEMO1

99%

TH

Ted-DEMO1 Hughes

Placing Broker Team Lead and Approver

Team

NYY Marine Southampton Brokers-DEMO1

Placements / Marine Multi-Risk

Team
NYY Marine Southampton Brokers-DEMO1

Placement owner
Ted-DEMO1 Hughes

Structure

Pool

Documents

Submissions

Messages

Overview

Create new submission

+ Quote

+ Firm order

+ Endorsement

+ Share Additional Information

All submission packs

Team: All

Type: All

Name	Type	Status	Created on	Created by	Sent on	Sent by	# Submissions	Broker team
Pack 1	Firm Order	Sent	25/07/2025 10:00	TH Ted-DEMO1 Hughes	25/07/2025 10:00	TH Ted-DEMO1 Hughes	2	NYY Marine Southampton Brokers-DEMO1

Underwriters API – Updated Submission Data to Include Additional PPL and Endorsement Data Fields

API Collection: Submission API

Underwriters will now be able to extract additional data fields that were added to PPL to support core changes that were introduced as part of the Contract Builder tool. In addition to this, Underwriters will now be able to see Endorsement-related data for any Endorsement Request and Endorsement Notice Submissions.

The screenshot displays the PPL Underwriters API interface. The top navigation bar includes the PPL logo, the user name 'HG Marine Risks-DEMO1', and a notification bell icon. The main content area is titled 'My Requests / Properties 2025' and shows a list of properties. The first property is 'B1111358537T445 - Property 2025 | v01'. Below this, there are three endorsement requests: '001 - UK' (New office), '002 - France' (Increase Limit), and '003 - Germany' (Increase Limit). The 'New office' request is highlighted, and its details are shown on the right. The details include the Endorsement Broker (Ted-DEMO1 Hughes), Type of endorsement (Increase Cover), Endorsement Agreement Practice (Parties as per contract), Endorsement Agreement Parties (All Agreement Parties), Notification to followers? (Yes), Within number of working days (7), Endorsement effective dates (07/05/2025 - 07/02/2026), Premium (AP), Currency (GBP), Premium amount (2000), and Settlement due date (09/06/2025).

Underwriters API – Managing (Firm Order) Responses

API Collection: Submission API

Underwriters will now be able to save and send responses to Firm Order requests received from Brokers. Where Carrier firms are already downloading the structured data and documentation using APIs, they will now be able to respond using APIs by saving their responses and sending them back to the broker.

Brokers will be able to supply additional MRCv3 data structures to the PPL platform primarily for users subscribing to PPL's Contract Builder feature. These additional fields will be available for Brokers when editing their MRC contract using the PPL Contract Builder tool.

Broker firms already using Market APIs to start their PPL placing journey will now be able to supply additional MRCv3 fields as structured data to the PPL platform. These additional fields will be available for Brokers when editing their MRC contract using the PPL Contract Builder tool.

Underwriters will be able to save their Acceptance, Conditional Acceptance or Reject responses from within their back-office systems, avoiding the need to log in to PPL. In other areas, 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 prior to committing back to the Broker.

Note: Carriers can use these new features to integrate with their other in-house systems, e.g. rating engines and AI-driven "auto-declinature" responses, to allow Underwriters to prioritise and focus on the risks that require their attention and align to their company's risk strategy.