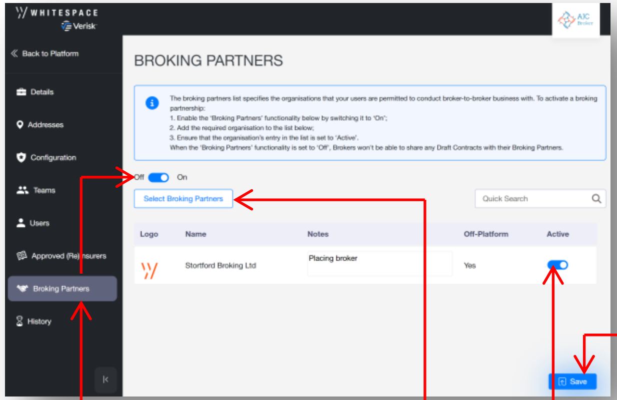
Connecting Brokers with the 'Broking Partners' System

1.

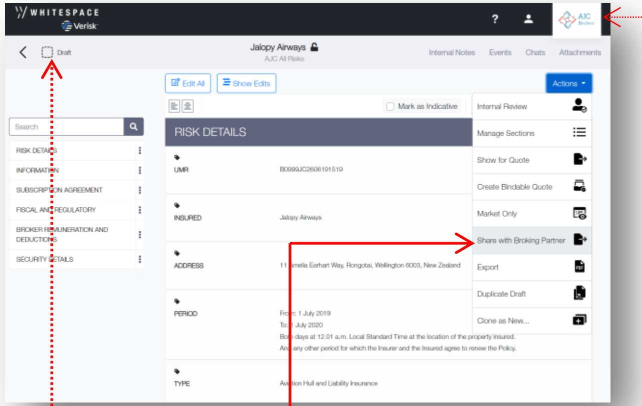


Remember to always save any admin portal changes

Producing broker sets 'Broking Partners' to 'On' in the admin portal.

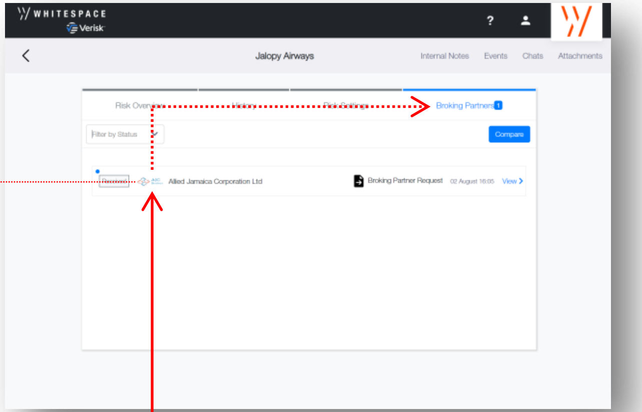
The required placing broker must be whitelisted via 'Select Broking Partners' and set as 'Active'.

2.



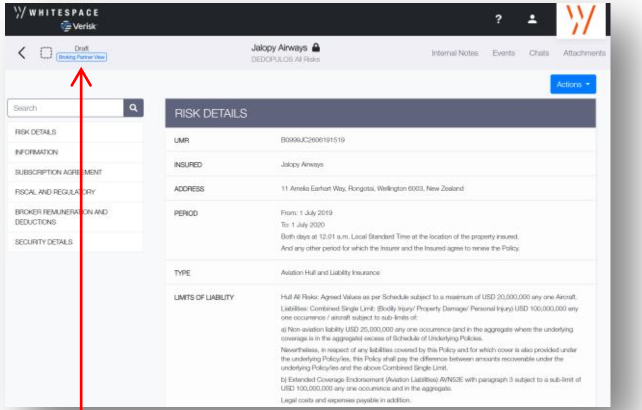
Producing broker opens the draft of the contract to share, selects 'Share with Broking Partner' from the 'Actions' menu, and selects recipient/s from the whitelisted brokers.

3.



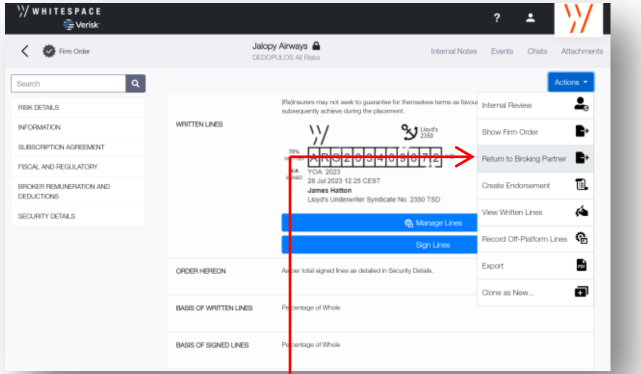
Placing broker receives the contract as a new draft in the dashboard. Opening the contract overview displays a new 'Broking Partners' tab which shows all transfers.

4.



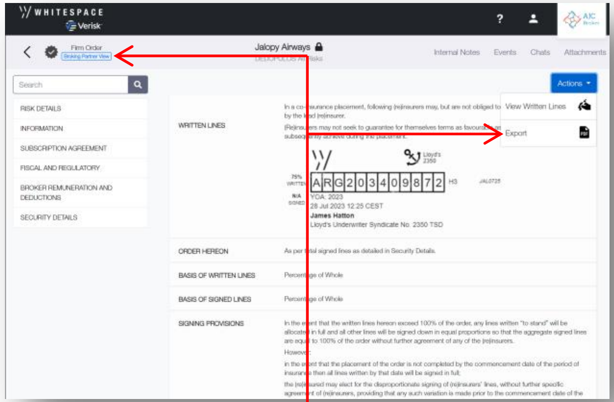
Placing broker has full control over the new draft and can edit, show and sign it as usual. Its status as a placing document is shown by the 'Broking Partner View' label.

5.



Placing broker can return a copy of the contract to the producing broker at any point by selecting 'Return to Broking Partner' from the 'Actions' menu. Questions and authorisations can be handled within the 'Chat' tab.

6.



Producing broker receives the contract instance as a 'Broking Partner View'-labelled advice document that can be exported as needed.