

Whitespace Platform Version 1.6.0

Author: Jack Harrison

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Release Details

Whitespace is proud to introduce the Dashboard for Browser and iOS. The Dashboard is a home screen and control centre which promotes an intuitive experience for the Whitespace Platform. Brokers and underwriters using the dashboard will also benefit from Action notifications which prompt the next steps in the placement of a risk.

New Feature: The Dashboard

- Core contract information is laid out clearly in the Dashboard.
- Action notifications prompt the next steps in the placement of risks. View required actions for each contract and filter all contracts requiring action in the My Actions tab.
- Other enhanced filters show recent contracts, templates, pinned risks, and contracts with labels.
- Search contracts by name, status, type, UMR, and owner.
- Return to Classic view for a more familiar feel.

Enhancements

- The non-notify party carrier role is now available on endorsements.
- Endorsements can now be cloned to the same contract from which they were created.
- UI improvements for the risk overview and contract view.
- Performance improvements for users with large accounts on Browser and iOS.
- Introduced option to withdraw contract authorisation requests.
- Contract authorisation events and email notifications now include notes.
- Browser eye icon introduced to iOS to indicate that an endorsement has been shown.
- iOS contract editing conflicts are recorded in the History (e.g., when syncing changes after multiple users edit a contract offline on iOS).
- The "Endorsements – Pending" filter now displays contracts with any incomplete endorsements instead of only endorsements which have been shown but not yet agreed.
- Browser option to select all authorisers when requesting contract authorisation added to iOS.

Resolved Issues

- Fix for issue where all users in a team became authorisers when one user was selected in the admin portal.
- Fix to ensure correct approved carrier configuration for admin users in multiple organisations.
- Fixes to ensure MI report information is correct for sectioned risks, leader status, written line percentage, and carrier team names.
- Fix to ensure that contract authorisation settings are applied when placing declarations via API.
- Fix to include trailing zeros to match the selected number of decimal places when signing a contract.
- Removed redundant option to withdraw a quote being prepared.
- Fix to ensure risks load correctly for other users when an underwriter who quoted a risk is suspended.
- Firm orders with endorsements are now included when using firm order filters.

Resolved Browser Issues

- Fixes for performance and usability when multiple team members make changes simultaneously.
- Fix to require re-authorisation when an authorised risk is edited if contract authorisation is set to mandatory in the admin portal.
- Fix to allow contract placement after contract authorisation is rejected or an authorised contract is edited if contract authorisation is set to optional in the admin portal.
- Fix to ensure that the correct team members are shown when sending a contract authorisation request.
- Removed contract authorisation option after a risk is signed.
- Removed contract authorisation obligations for off-platform risks.

- Fixes to stop the creation of new sections and vertical terms after a risk is signed.
- Brokers are now returned to the risk overview after deleting a second draft.
- The company name rather than ID is now shown in the chat/network tab.
- Fix to allow underwriters to add attachments to marketed contracts.
- Fix for issue where right-hand sidebar briefly appears blank.
- Fix to remove “Contract already has a leader” message when switching teams during off-platform contract placement.
- Fixed scroll bar when selecting endorsement roles on an endorsement with many carriers.
- Fix to preselect a carrier’s notify party role if they were a notify party on the last completed endorsement.
- Fix to ensure the display of attachments to marketed risks without needing to refresh.
- Fix to reduce time to delete contract attachments.

Resolved iOS Issues

- Fix to remove authorisation button from the Written Lines heading once a risk has been sent for authorisation by an underwriter.
- Fixed UI wrapping issues on iPad and iPhone.
- Fix to enable cloning to a template on iOS.
- Fixed spelling error in contract authorisation menu.
- Fixed visual bug where carriers in the risk overview appeared to reorder when selecting the contract.

Production Installation and Access Guide

iOS App

iOS users will need to upgrade their Whitespace Platform iOS app to the latest version, which is available on the Apple App Store.

If you experience any difficulty signing in after the upgrade, it may be necessary to delete and reinstall the iOS app.

Browser

The Whitespace Platform on Browser will update automatically. If you are already logged in at the time of the update, you will see a notice requiring you to refresh the page.