

WHITESPACE ADMINISTRATION PORTAL USER GUIDE

This guide, fully updated for **v3.6.0** of the Whitespace Platform, details the full use of the Admin Portal in an onboarding-friendly order, so that your organisation can get up and running as quickly and smoothly as possible.

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1. Overview of Onboarding

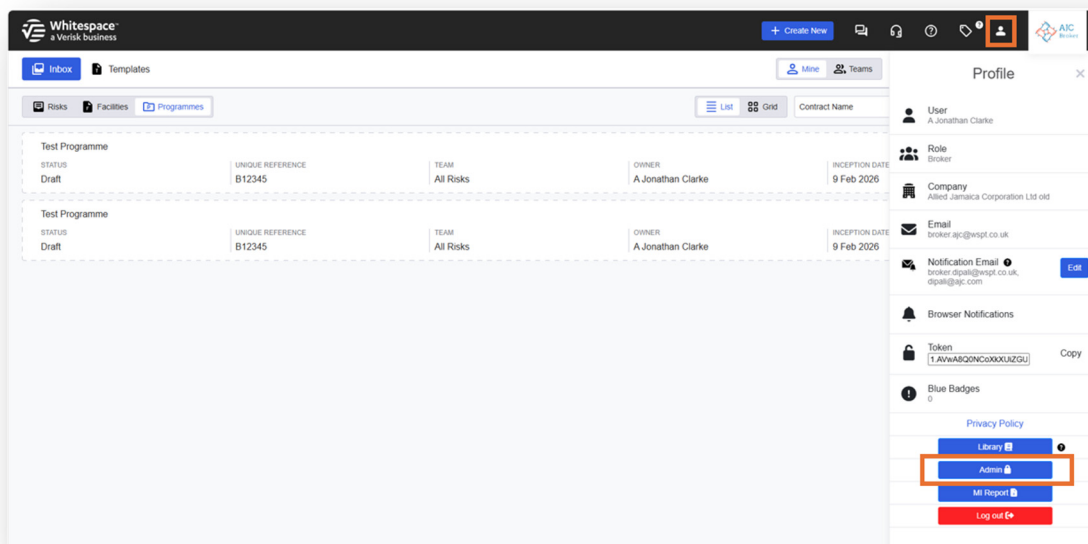
Whitespace’s onboarding process follows these simple steps:

1. The Whitespace support team (email: support@whitespace.co.uk) will take the following actions:
 - a. Creation of your organisation’s core account, associating it with your existing email domains.
 - b. They will provide your designated administrator with a Microsoft Azure Active Directory (AD) login to the platform.
2. **Please note:** If onboarding is being performed for your organisation by Whitespace, your account manager will guide you through filling in the onboarding sheet, and our support team will take care of all set-up steps beyond step 2. For manual onboarding – and later management of users and options – an administrator logs into the platform and accesses the admin portal. There, they set up the organisation’s users and assign them to teams, manage their logos, stamps, and other core elements, configure certain business options, and grant administrator status to other users as required. *The remainder of this guide details these processes.*
3. Whitespace creates Microsoft AD platform logins for each user set up by the administrator.
4. Each user with a Microsoft AD platform login receives an invitation to sign in to the Whitespace platform.

2. Accessing the Administration Portal

The admin portal is available via the browser version of the platform, located at www.whitespaceplatform.com.

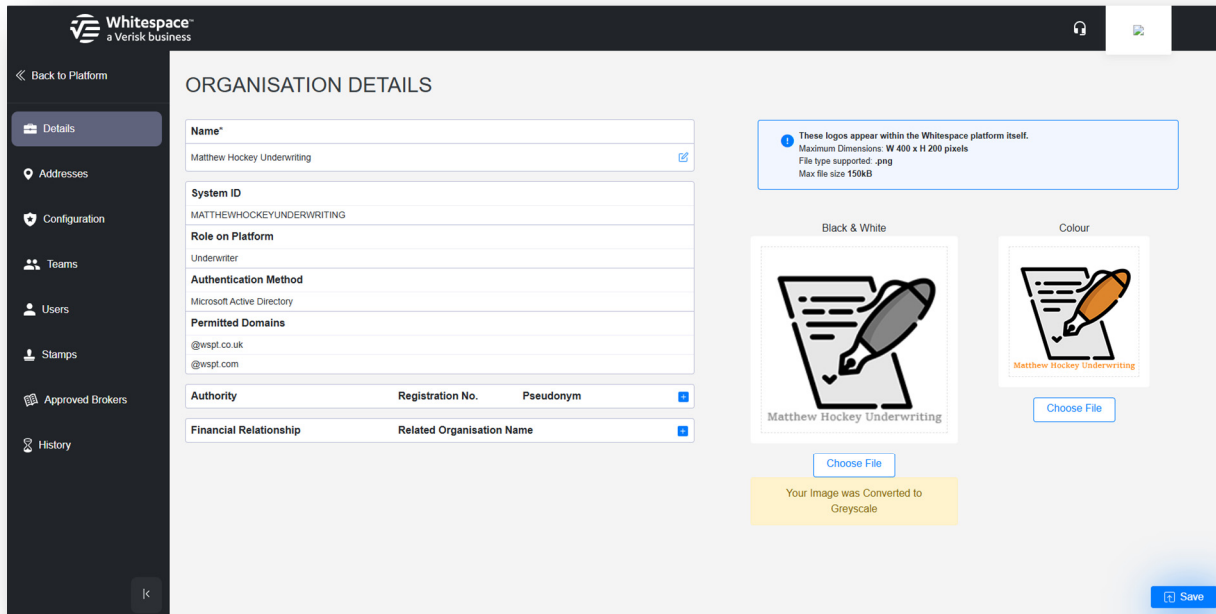
To access it, log in to the platform with the credentials provided by Whitespace support, click the ‘head and shoulders’ user icon on the top bar (highlighted in orange below), and then press the blue “Admin” button near the bottom of the profile tab, also highlighted. Users who do not have administrator status will not see the button on their profile tab.



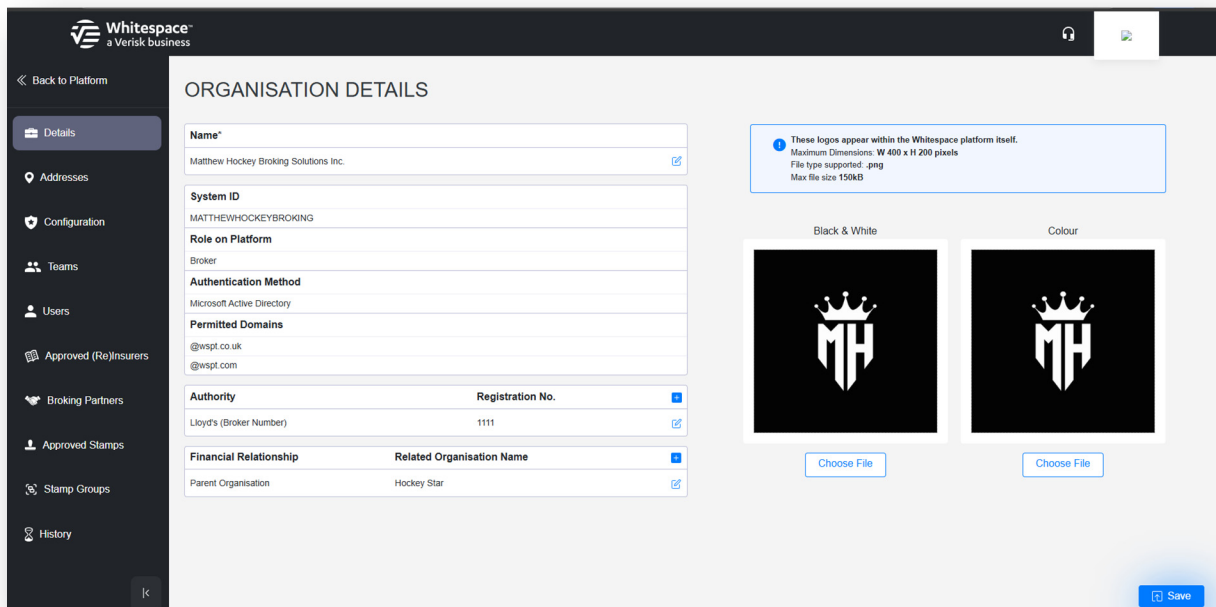
3. Overview of the Administration Portal

When opening the admin portal, you arrive at the panel that displays your organisation's details. The black sidebar to the left of the screen shows the panels available to you – brokers and re/insurers have slightly different configuration options.

Re/Insurer Portal View



Broker Portal View




The most important fact to remember about the admin portal is that to minimise complicated errors, **all** changes are pending until you click the blue 'Save' button, located in the bottom right corner of each main panel (highlighted below).

ORGANISATION DETAILS

Name*	
Matthew Hockey Broking Solutions Inc. ✎	
System ID	
MATTHEWHOCKEYBROKING	
Role on Platform	
Broker	
Authentication Method	
Microsoft Active Directory	
Permitted Domains	
@wspt.co.uk	
@wspt.com	
Authority	Registration No. +
Lloyd's (Broker Number)	1111 ✎
Financial Relationship	Related Organisation Name +
Parent Organisation	Hockey Star ✎


! These logos appear within the Whitespace platform itself.
 Maximum Dimensions: W 400 x H 200 pixels
 File type supported: .png
 Max file size 150kB

Black & White



Choose File

Colour



Choose File

Save

Until 'Save' has been clicked, all pending changes can be undone, and if you navigate away from (or close) the admin portal, they will be permanently discarded. Once you click 'Save', the changes are logged in the History panel and propagated through the system. Be aware **some changes are permanent and, due to on-going legal/compliance implications, cannot be undone.**

Best Practice: Always remember to double-check any changes before they are locked in, and then click 'Save' to confirm them before navigating away from the portal.

4. Configuring User Teams

Organisations on the Whitespace platform are subdivided into teams. Teams group together colleagues, control access to information, and mediate contact between different organisations.

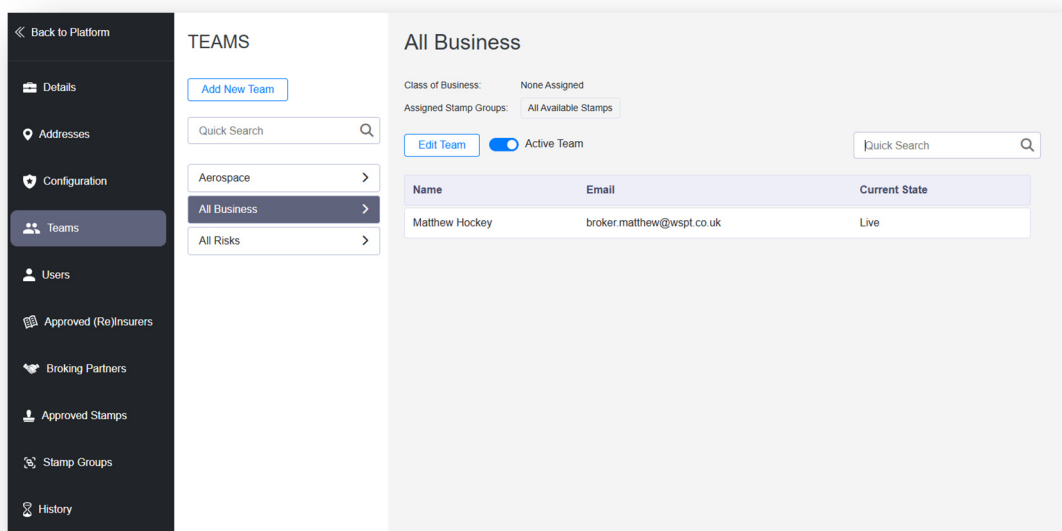
These teams consist of a name – often describing the class of business handled by the members of that team – and a list of the users who are team members.

Before a user can access the core functionality of the Whitespace platform, they need to be assigned to one or more teams by an administrator. Users and administrators who are not part of a team cannot access that team's contracts or other platform data.

Please note: contracts are assigned to teams rather than individual users, so all active users need to be on at least one team.

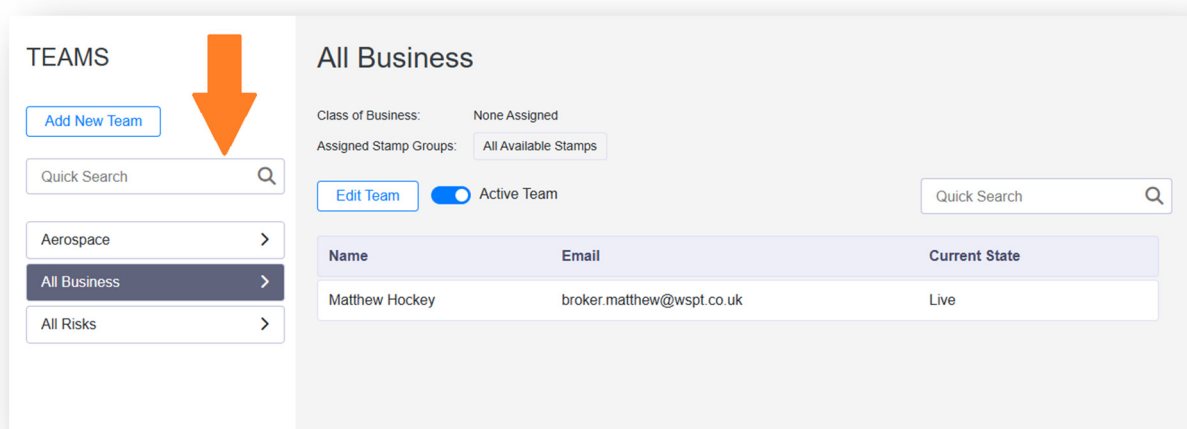
To configure your teams, click on the 'Teams' button in the left-hand navigation pane to open the Teams panel.

The left-hand portion of the panel shows a full list of your existing teams in the order in which they were created. The darker right-hand portion of the panel shows the information of the currently selected team, including a full list of its members.



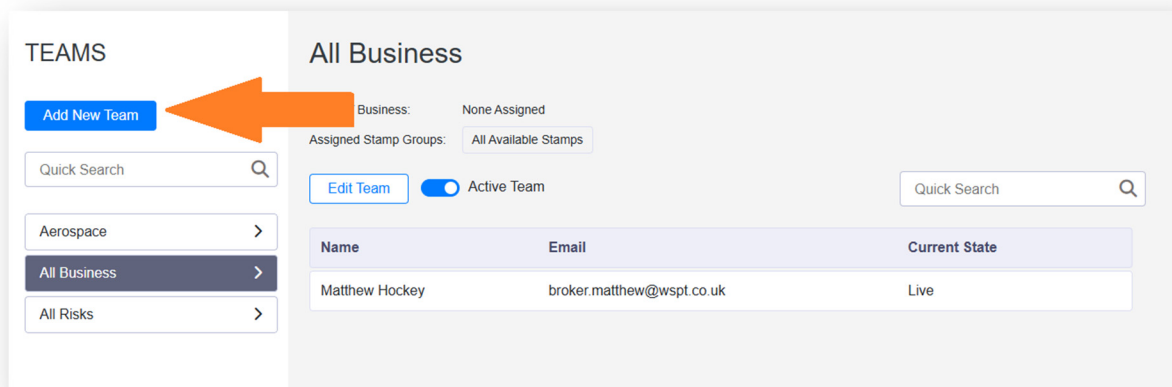
4a. Finding Teams

To search for a specific team, click in the 'Quick Search' box below the 'Add New Team' button, and type. The list of teams will be filtered to display only those team names that match all or part of the text you enter. The list is scrollable if required.

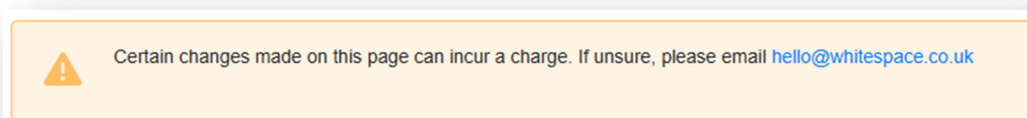


4b. Adding Teams

To add a new team, click on the 'Add New Teams' button:



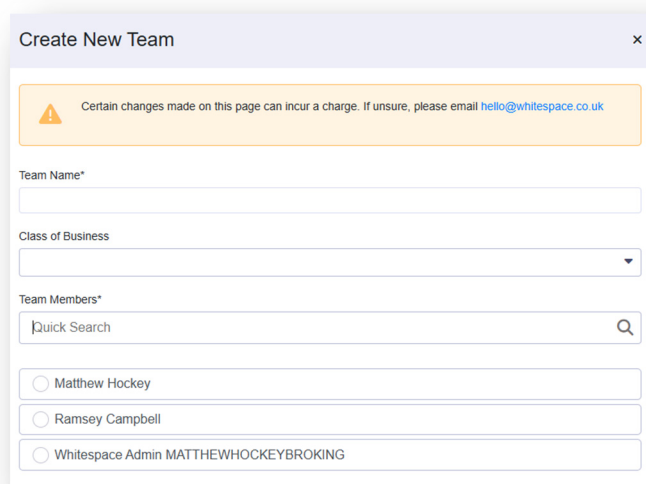
You will see the below warning message at the top of the tab – if you are in any doubt please follow the instruction to email hello@whitespace.co.uk in order to seek confirmation.



For legal reasons, saved teams are **permanent**, and **cannot be deleted** – although they can be renamed and/or deactivated.

Best Practice: If it is vital to have a completely new name for an existing team, you are strongly encouraged to create a new team and deactivate the previous one rather than repurposing the existing team.

When you click on the 'Add New Teams' button, the Create New Box is displayed:



The 'Create New Team' modal form contains the following fields and options:

- A warning banner at the top: "Certain changes made on this page can incur a charge. If unsure, please email hello@whitespace.co.uk".
- 'Team Name*': A text input field.
- 'Class of Business': A dropdown menu.
- 'Team Members*': A section with a 'Quick Search' input field and a magnifying glass icon.
- Three radio button options for team members:
 - Matthew Hockey
 - Ramsey Campbell
 - Whitespace Admin MATTHEWHOCKEYBROKING

- Enter the name of the new team in the 'Team Name' field.
- Complete the 'Class of Business' field with the type of business the team handles: Marine, Medical etc. This is currently a free text box but may become a pre-defined dropdown selection in subsequent releases.
- All the organisation's users are listed under the 'Team Members' heading. You may scroll the list, or type into the 'Team Members' quick search box to filter the list to names matching the text you have typed.
- Click a user's name to toggle them as a team member, shown by the tick in their selection circle.
- All teams must have at least one non-suspended user as a member.
- There is no limit to the number of teams a user can belong to, and teams may have as many members as you have users.
- When you have finished adding users to the team, click 'Confirm' – and remember, when the team is correct, click 'Save'.

Best Practice: During manual onboarding, when users have yet to be configured, you can add yourself temporarily to teams so that they can be created. This is more efficient than creating your users first, particularly when you will have fewer teams than users.

Please note: currently, when creating and saving a new Underwriter team, this new team is automatically given access to all available stamps. You can restrict access to any of these stamps they should not have by following the instructions in *13c. Assigning Users to a Stamp*.

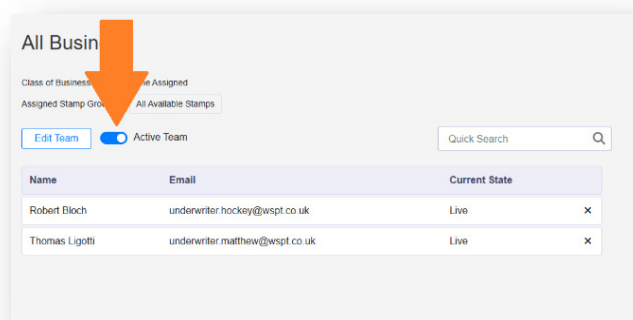
4c. Editing Teams

To edit a team's name or member list, select the team and click 'Edit Team'.

The 'Edit Team' box is identical to the 'Create New Team' box except for its title bar. Click users to add or remove them and/or click and type in the 'Team Name' field to change it. Click 'Confirm' then 'Save' when done.

4d. Deactivating Teams

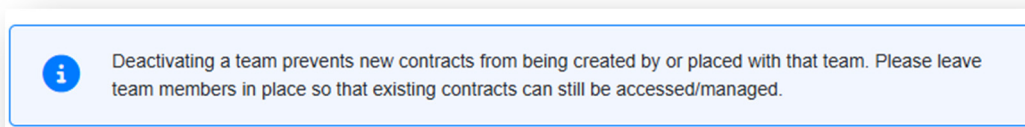
As mentioned in '4b. Adding Teams' saved teams cannot be deleted. However, they may be set to inactive, which will prevent any new business from being transacted under them. To make a team inactive, select it and click on the blue 'Active Team' toggle immediately to the right of the 'Edit Team' button.



Inactive team names appear in a lighter shade of grey in the team list.

Please note: inactive teams must still have at least one non-Suspended user member at all times in case existing contracts or new endorsements need servicing or attention.

When deactivating a team please take care to read and understand the warning message that will appear:



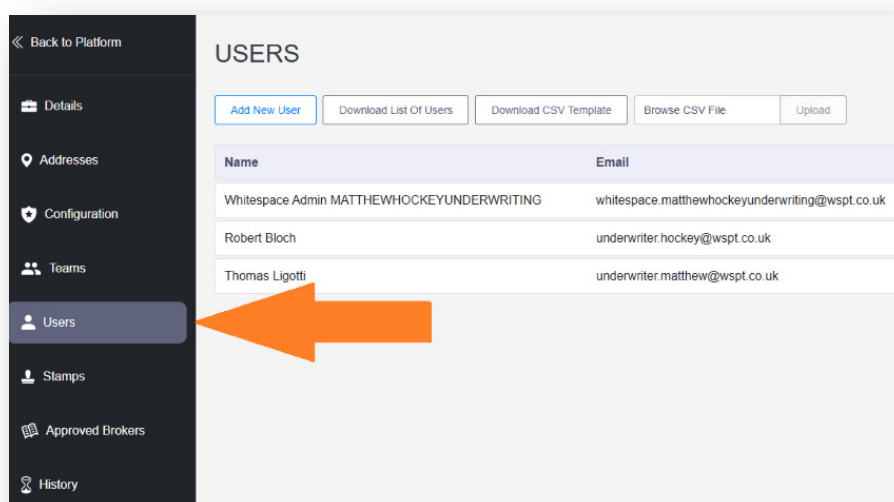
5. Configuring Users

Before a member of your organisation can access the Whitespace Platform, they need to be issued an invite which includes their personal Microsoft Active Directory login.

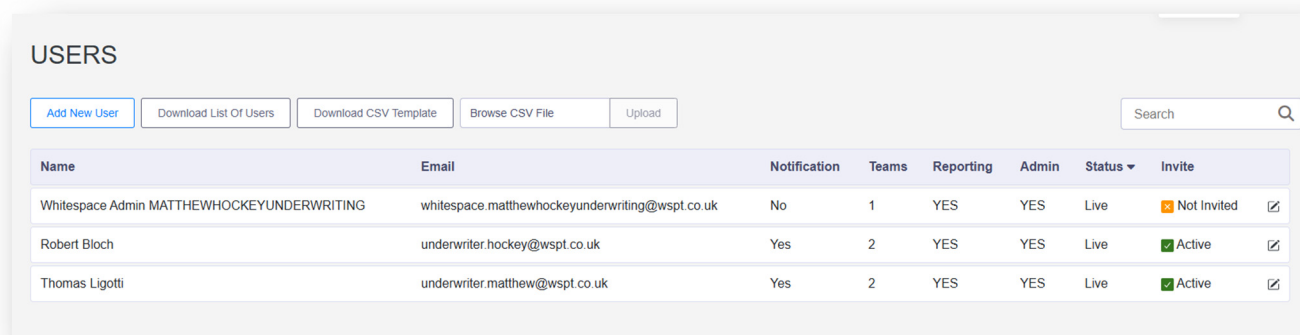
Please note: These logins may not be shared with any other user.

To issue an invite, an administrator adds the intended recipient to the user list via the admin portal. Users can be added individually or in bulk using a template as discussed below. Invites can only be issued to unique email addresses on one of the company email domains that your organisation registered with Whitespace during the sign-up process.

Please note: These domains must be wholly owned by your organisation. Invitations **WILL NOT** be issued to email addresses at mass-market providers such as Gmail or AOL. If you need to add a user with an email address at a new domain, contact support@whitespace.co.uk to get the new domain associated with your organisation. To configure your users, click on the 'Users' button in the left-hand navigation pane to open the Users panel.



The Users panel displays a full list of all your organisation's Whitespace users, ordered chronologically by default.



Name	Email	Notification	Teams	Reporting	Admin	Status	Invite
Whitespace Admin MATTHEWHOCKEYUNDERWRITING	whitespace.matthewhockeyunderwriting@wspt.co.uk	No	1	YES	YES	Live	Not Invited
Robert Bloch	underwriter.hockey@wspt.co.uk	Yes	2	YES	YES	Live	Active
Thomas Ligotti	underwriter.matthew@wspt.co.uk	Yes	2	YES	YES	Live	Active

Each row in the user table gives a summary of one user – name, email address, whether the user has a separate email registered for platform notifications, the number of teams they are a member of, whether they can generate Management Information Reports, whether they have access to the admin portal, their status on the system, and the status of their Active Directory invitation – note that only 'Active' users are able to log in.

To open the user's details for editing simply click on the paper-and-pen icon at the end of the row.

5a. Finding Users

You can filter the list by either name or email by typing into their 'Search' box in the top right, and scrolling if required. You may also filter users by status by clicking on the drop-down arrow to the right of the 'Status' header and ticking the statuses to display (see section 5b for details of individual statuses).

You can click the 'Download List of Users' for a downloadable .csv spreadsheet version of the table displayed on the Users panel. There are two primary differences between the on-screen list and the downloaded list – the latter specifies the teams that the user is part of, including the team name and the team identifier, and also omits the information in the 'Invite' column.

Additionally, the downloaded list also contains each user's unique system ID, and confirms their permissions on a team-by-team basis.

Finally, the downloaded spreadsheet gives the time and date when each user was added, when their profile was last modified, and when they logged in to the platform.

5b. User Access to the Platform

A user's status can be 'Live', 'ReadOnly', 'Draft', or 'Suspended':

- **'Live'** users have regular full access to the Whitespace Platform. Live users may be set to 'Suspended' but they cannot be set back to 'Draft' (see below for definitions).
- **'ReadOnly'** users can log in and examine any contracts associated with their teams, but they cannot make any changes or conduct any business.
- **'Draft'** indicates that a user is in the process of the invite and set-up stage of the user creation process but cannot yet login to the platform.
- **'Suspended'** users have no platform access, and do not appear as members of any teams on the platform, either internally or externally.

Please note: for legal reasons, you cannot delete users. To revoke a user's access, set them to 'Suspended'.

5b-i. Commercial Implications of User Statuses

A user's Status can have direct commercial and/or financial implications. Please be aware of these before assigning users. If you are in any doubt, please email hello@whitespace.co.uk in order to seek clarification.

- **'Live' and 'ReadOnly':** These users become chargeable whenever they are first assigned to any team. Please note that there is a minimum of three months' charge upon saving a user as 'Live', or as 'ReadOnly' with team access, even if that user is then suspended.
- **'Draft':** Draft users do not have access to the platform and do not incur charges.
- **'Suspended':** Suspended users do not have access to the platform and do not incur charges. However, if you reinstate a 'Suspended' user within six months of their suspension, they will incur charges backdated to when they were suspended.

5c. Inviting Users

When a new 'ReadOnly' or 'Draft' user is saved, a platform invitation e-mail is automatically generated. This provides them with the credentials to log in. The current stage of this process is shown in the 'Invite' column.

'Incorrect Domain', shown with a red "-" icon, indicates that the user's email domain is not one of your authorised domains. You can contact Whitespace Support (email: support@whitespace.co.uk) if you need to add a new email domain, but please note that shared domains and public email providers are forbidden for security reasons.

'Not Invited', shown with a yellow "x" icon, indicates that while the email domain is valid, the mail system for that domain has not yet accepted an invite email for that specific email address. It can take a minute or two for the system to issue the invite, but if the 'Not Invited' condition persists, check to ensure that the email address has been entered correctly.

'Pending Response', shown with a blue envelope icon, indicates that an invite email has been successfully sent, but the user has not yet used the provided credentials to log into the platform. If the user has somehow lost the invite, a new one can be issued by setting the user to 'Draft', saving the change, then re-setting their status to 'Live' or 'ReadOnly', and saving that change as well.

Once the user has confirmed they have received the invitation and are ready to begin using the platform, the administrator should change their status to 'Live'.

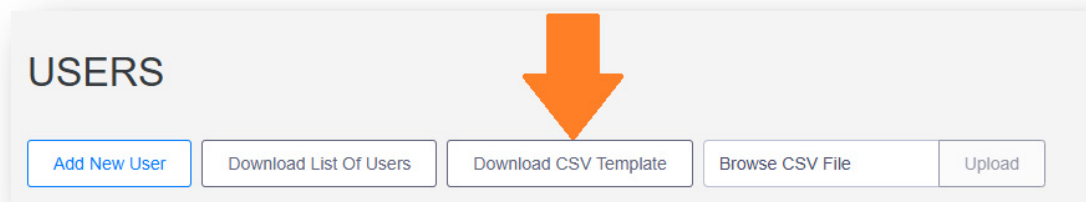
'Active', with a green tick icon, indicates that the user has successfully logged into the platform.

5d. Adding Users in Bulk

Whilst users can be added individually, as detailed in section 5e below, a downloadable template is provided to allow administrators to add any number of users in a single operation.

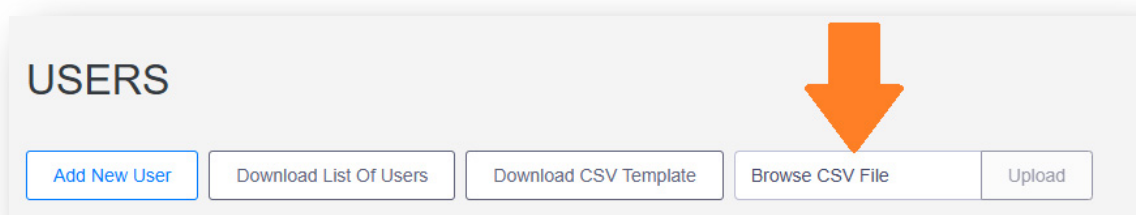
Please note: for security reasons, only basic user information is permitted when adding bulk users – the user's name, email address, team memberships, and activity status. Advanced or sensitive permission flags, such as Administrator status, must be set manually. Some advanced flags can have serious implications for your organisation, and must only be assigned with the requisite degree of caution.

To obtain the template for bulk-adding users, click on the 'Download CSV Template' in the top line of the Users panel, and save the file somewhere accessible.



Open the file in your spreadsheet program or, if necessary, word processor. Put one user in each row, with the email address in column A, name in Column B, the team name/s in Column C (separated by a single space when adding the user to more than one team), and their desired activity status in Column D.

When the user detail spreadsheet is complete, save it with a memorable name, retaining the .csv format, and go back to the Users panel. Click on the 'Browse CSV File' button next to the 'Download CSV Template' button.

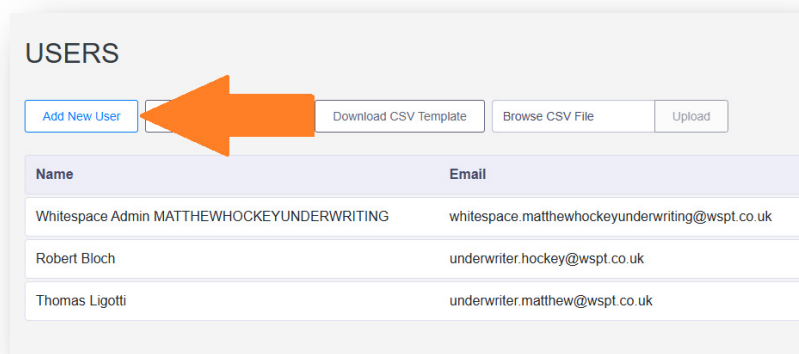


When prompted, navigate to the saved spreadsheet.

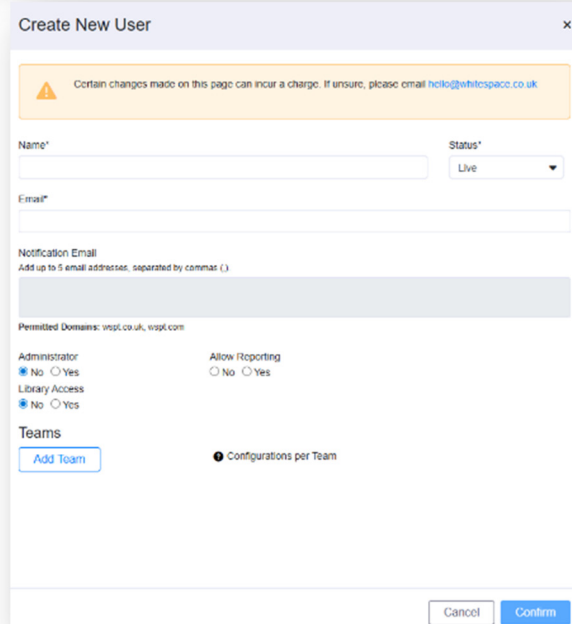
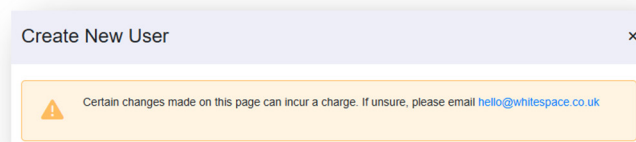
Select the file and click 'open' in your operating system dialog to tell the admin portal which file you want to use. Then click the 'Upload' button next to the 'Browse CSV File' button to actually import the new users. When you are happy with the result, click 'Save' to finalise the additional users and begin the invitation process.

5e. Adding Users Individually

To add a single user to the platform, click the 'Add New User' button on the Users panel.



You will see the below warning message at the top of the 'Create New User' tab – if you are in any doubt please follow the instruction to email hello@whitespace.co.uk in order to seek confirmation.



To create a new user, add the user's name and email address. Notification email addresses do not need the same degree of security as login emails, and can be set by the user, or added/edited once the user is active.

The user's activity status defaults to 'Draft' and can be altered by clicking on the dropdown 'Status' box and selecting a different status from the drop-down menu. See section 5b. *User Access to the Platform* above for a description of the statuses and their effects.

To assign the user to a team, click the 'Add Team' button to add a blank row in the teams list. Click on the blank entry to open a drop-down list of all active teams that the user is not currently on and select the desired team name from the list. You can type the first letter of the team name to rotate between all teams beginning with that letter.

Advanced user permissions and team configurations are discussed in detail below.

When you are happy with the new user, click 'Confirm' and then 'Save' to issue their platform invite.

5f. *Editing Users*

To edit a user, click anywhere in their row in the user list of the Users panel. Remember, you can type their name into the 'Search' box at top right to filter the list.

Other than its title, the 'Edit User' window is identical in all respects to the 'Create New User' window, so please refer to 5e. *Adding Users Individually* above for core functionality, or keep reading for advanced options.

5g. *Setting Advanced User Permissions*

There are a number of user permissions flags that provide access to more advanced functionality and systems within the platform (these are discussed in detail in sections 5g-i to 5g-xvi).

For security reasons these cannot be added in bulk, but they can be freely added or removed by administrators when adding or editing individual users.

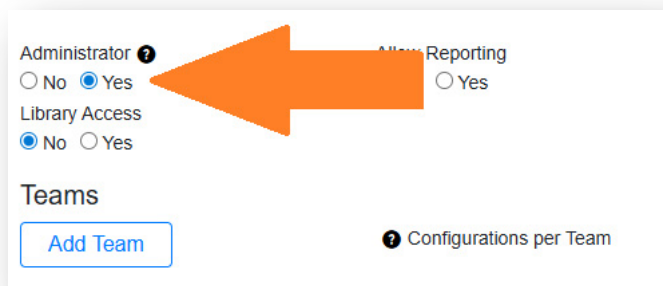
Best Practice: These options come with a variety of considerations. It is strongly recommended that users not be given more permissions than they need.


5g-i. *Administrator Permissions*

The Administrator role carries a significant degree of power over your organisation's use of the Whitespace Platform, including the ability to create a unique team inaccessible to other users from which business can be conducted. As such, giving your organisation's brokers/underwriters access to the admin portal may constitute a significant compliance hazard.

Please very carefully consider whether a user needs Administrator authority before assigning them this permission.


To set a user as an administrator, click the 'Yes' radio button under the 'Administrator' heading, located on the Create/Edit User window above the list of teams, then click 'Confirm' and 'Save'. Similarly, to revoke administrator access, click the 'No' button, confirm, and save.



Administrator  No Yes

Library Access No Yes

Teams

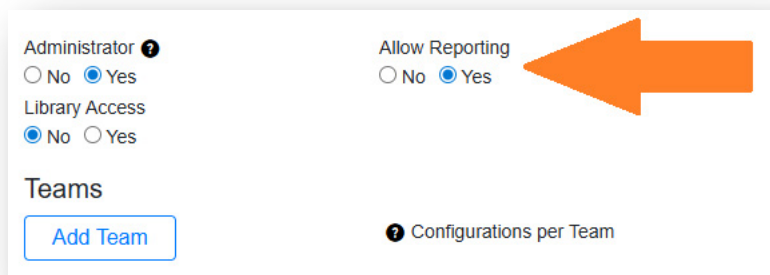
[Add Team](#)  Configurations per Team


5g-ii. Management Information Reporting Permissions

Users with Reporting permissions can generate MI Reports that detail all the business that their assigned teams have carried out on the platform to date. These reports are computationally expensive to generate, and as such, giving Reporting permission to a user may have financial implications for your Whitespace account. Please contact your Whitespace account manager for more detailed information.

To allow a user to generate MI Reports, click the 'Yes' radio button under the 'Allow Reporting' heading, then click 'Confirm' and then 'Save'.


Similarly, to revoke reporting permission, click the 'No' button, confirm, and save.



Administrator  No Yes

Library Access No Yes

Teams

[Add Team](#)  Configurations per Team

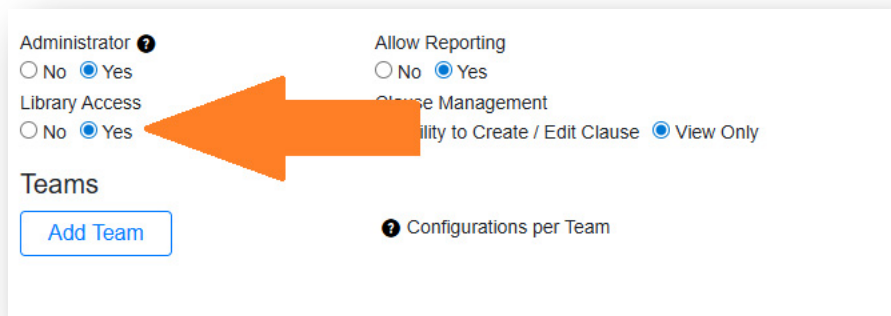
5g-iii. Library Access Permissions

Only users with the 'Library Access' permission will be able to enter and use the functionality of the contract library.

Users with Library Access are able to add, edit or delete line items, contracts, layout guides and templates, giving them a degree of power over your organisation’s use of the Whitespace Platform. Please consider this carefully before assigning access.

To allow a user to access the library, click the ‘Yes’ radio button under the ‘Library Access’ heading, then click ‘Confirm’ and then ‘Save’.

Similarly, to revoke access, click the ‘No’ button, confirm, and save.

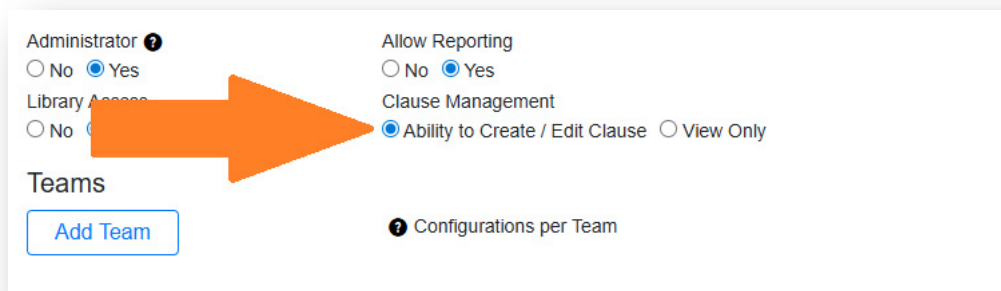


5g-iv. Clause Management Permission

Users with library access may also be given ‘Clause Management’ permission, allowing them to create and edit library items of the ‘clause’ line item type.

To allow a user clause management permissions, click the ‘Ability to Create/Edit Clause’ radio button under the ‘Clause Management’ heading, then click ‘Confirm’ and then ‘Save’.

Similarly, to remove the permission to create or edit, click the ‘View Only’ button (giving them the ability to see existing clauses but not change them), confirm, and save.

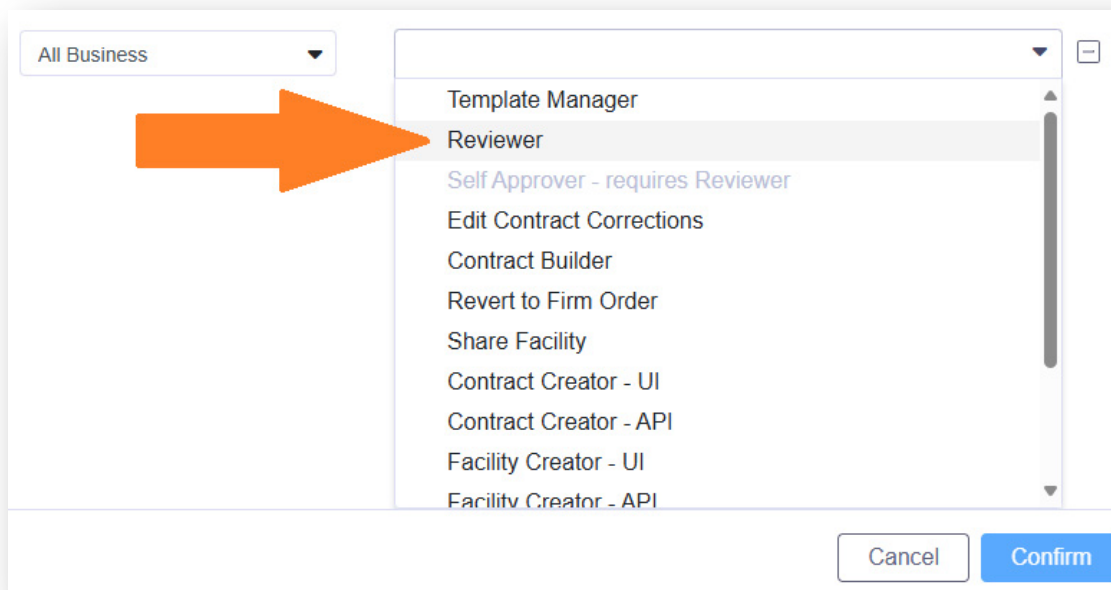


5g-v. Internal Reviewer Permissions

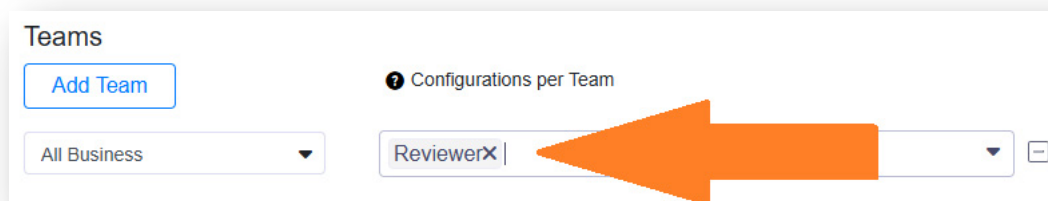
If a team includes at least one reviewer, team members may at any time choose to send a contract for internal review. The contract can then not be progressed until the reviewer has approved it. Similarly, organisations may choose to make internal reviews mandatory for contracts reaching certain stages in the placing process.

Permission to conduct an internal review of a contract is granted on a team-by-team basis. Reviewers are responsible for authorising that a contract is fit to progress to the next stage in the placing process, and so should be suitably qualified for this role.

Reviewers cannot by default review their own contracts. If internal reviews are mandatory in your organisation, each team needs to have at least two members with the 'Reviewer' permission, because otherwise, the sole reviewer will never be able to progress their own contracts.



Select the permission. The label then appears within the box associated with that team, and can be removed by clicking the 'x' at the end of the label. When you have set all team permissions needed, click 'Confirm' and then 'Save'.

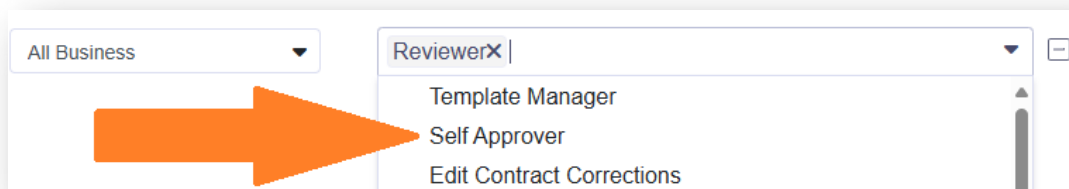


5g-vi. Self-Approver Permissions

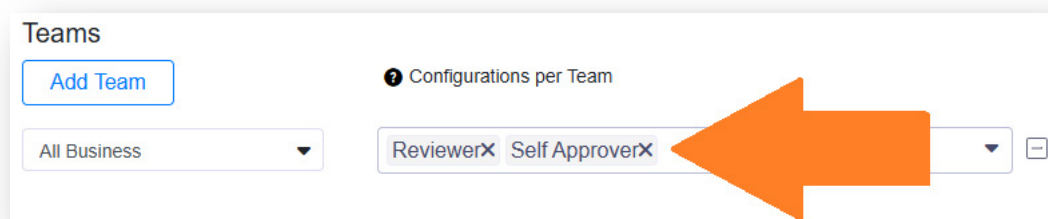
In cases where it is needed – for example, a team that is too small to have two internal reviewers, or a user for whom oversight would be inappropriate – you can give a reviewer the 'Self-Approver' permission for one or more teams. This allows the reviewer to also review their own contracts, so that their work does not require a second reviewer.

Best Practice: where possible, it is better to give a second qualified user the 'Reviewer' permission.

To give a reviewer the 'Self-Approver' permission for a team, click on the down-arrow at the right hand side of the long box containing the 'Reviewer' flag for the team in question, and click 'Self-Approver' from the drop-down that opens.



The 'Self-Approver' flag appears within the box along with the 'Reviewer' flag. Please note that it is not possible to grant 'Self-Approver' status to a user who is not already a reviewer.



To remove the permission, click the 'x' at the end of the label. When you have set the permissions that are required, click 'Confirm' and then 'Save'.

5g-vii. Brokers Only: Template Manager Permission

New contracts on the Whitespace platform are typically created from pre-defined templates. These mix standard clauses and common wordings with tagged data fields that can hold the specifics of the contract in a Lloyd's CDR-friendly format. Such templates often require significant amounts of work to prepare, and so should not be altered casually or accidentally.

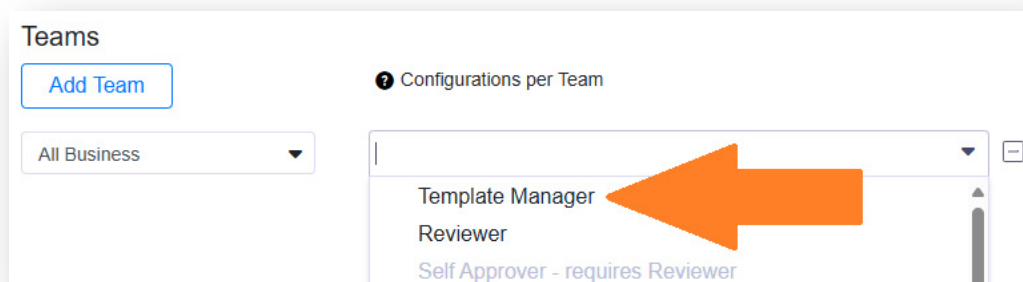
The 'Template Manager' permission allows a user to create and edit templates freely for a given team. Users without the permission can access and clone templates to create a new contract and then edit that, but they cannot manipulate the original templates.

Some organisations will want to keep the number of template managers per team strictly controlled, while others will prefer to allow that functionality to the majority of users. Any team without at least one template manager will be unable to create new templates.

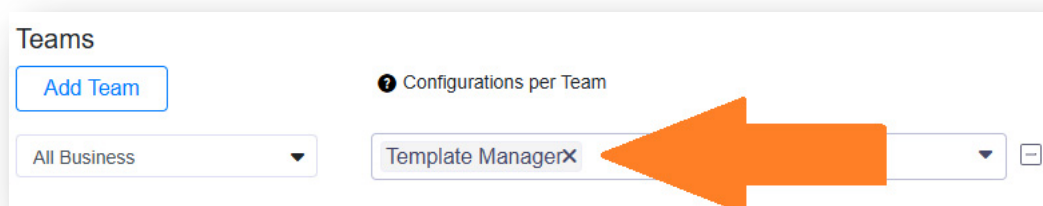
Please note: brokers can lock contract text in whole or in part to prevent later changes, and can also undo such locks as required. Template managers have access to a higher-level locking function that only other template managers can unlock. Regular users are unable to remove template managers' locks. Both levels of locking can be applied to templates. When

a user clones a template which has been wholly or partially locked, the resulting new contract inherits the same locking as the template.

To give a broker the 'Template Manager' permission for a team, click on the down-arrow at the right hand side of the long box next to the name of the team in question, and click 'Template Manager' from the drop-down that opens.



The label then appears within the box associated with that team, and can be removed by clicking the 'x' at the end of the label. When you have set all team permissions needed, click 'Confirm' and then 'Save'.

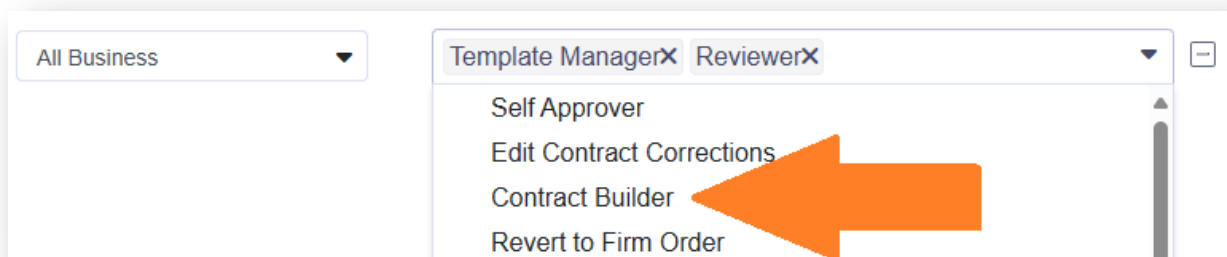


5g-viii. Brokers Only: Contract Builder Permission

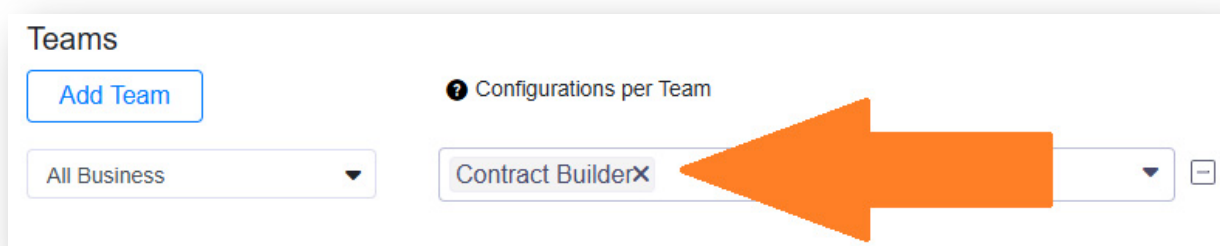
Only brokers with the 'Library Access' or 'Contract Builder' permissions are able to see, access and utilise the platform's Contract Builder functionality.

Please note: Because of a known issue in 3.6 of the Platform, brokers with library access do not have automatic access to the Contract Builder. To use the Contract Builder, brokers must have the permission enabled for each appropriate team for which they require access.

To give a broker the 'Contract Builder' permission, click on the down-arrow at the right-hand side of the long box next to the name of the team in question, and click 'Contract Builder' from the drop-down that opens.



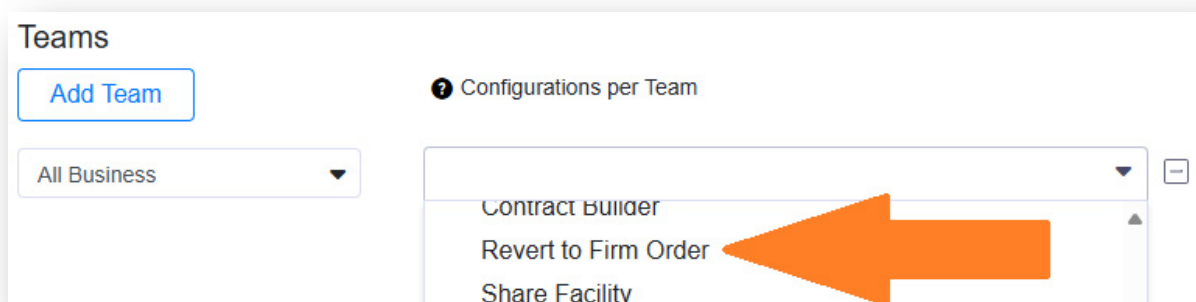
The label then appears within the box associated with that team, and can be removed by clicking the 'x' at the end of the label. When you have set all team permissions needed, click 'Confirm' and then 'Save'.



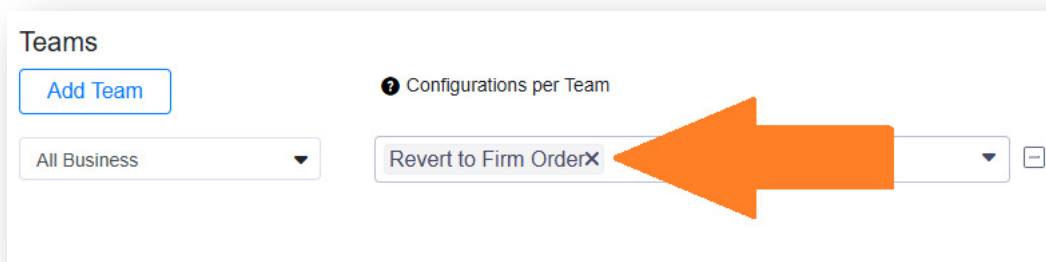
5g-ix. Brokers Only: Revert to Firm Order Permission

Only brokers with the 'Revert to Firm Order' permission are able to roll a signed contract back to the firm order stage – effectively cancelling the signing.

To give a broker the 'Revert to Firm Order' permission, click on the down-arrow at the right hand side of the long box next to the name of the team in question, and click 'Revert to Firm Order' from the drop-down that opens.



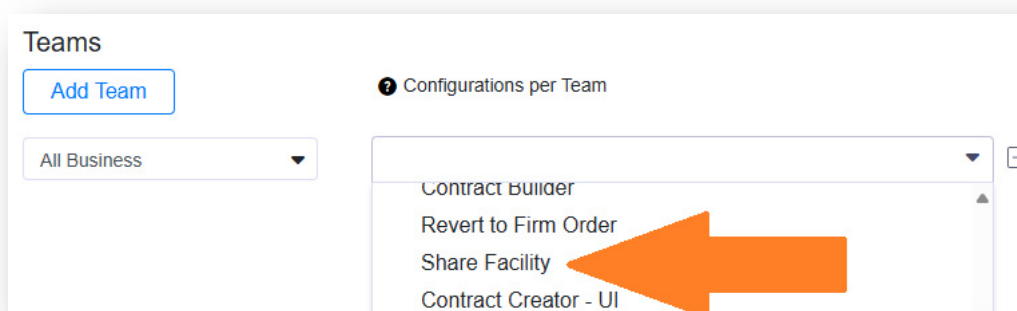
The label then appears within the box associated with that team, and can be removed by clicking the 'x' at the end of the label. When you have set all team permissions needed, click 'Confirm' and then 'Save'.



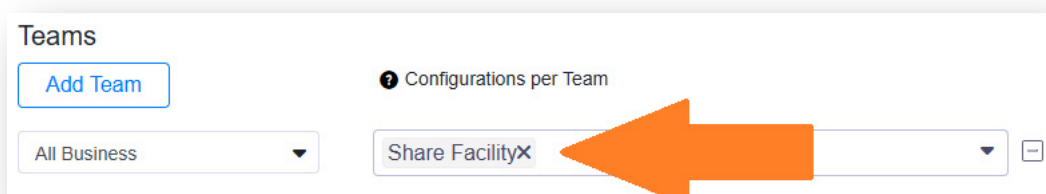
5g-x. Brokers Only: Share Facility Permission

Only brokers with the 'Share Facility' permission can share facilities and off-platform facilities with other teams.

To give a broker the 'Share Facility' permission, click on the down-arrow at the right-hand side of the long box next to the name of the team in question, and click 'Share Facility' from the drop-down that opens.



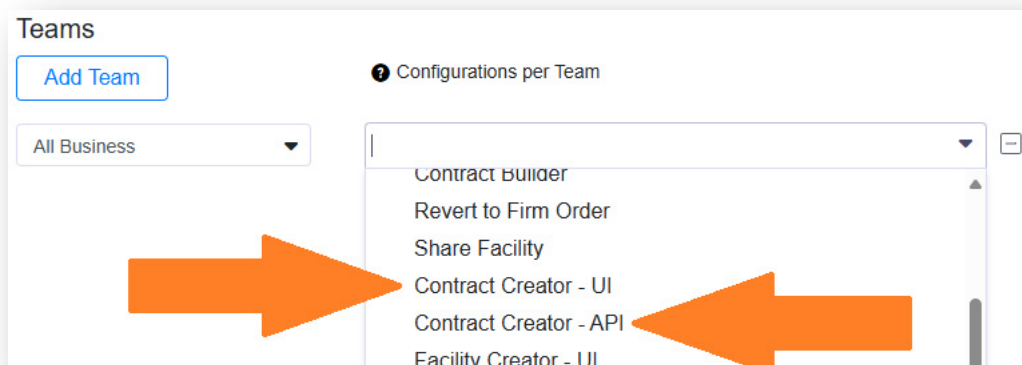
The label then appears within the box associated with that team, and can be removed by clicking the 'x' at the end of the label. When you have set all team permissions needed, click 'Confirm' and then 'Save'.



5g-xi. Brokers Only: Contract Creator UI/API Permissions

This permission allows broker users to create new contracts via the platform (for the UI permission), and/or via API Calls (for the API permission).

To give a broker either/both of the 'Contract Creator' permissions, click on the down-arrow at the right-hand side of the long box next to the name of the team in question, and click 'Contract Creator UI [or API]' from the drop-down that opens.



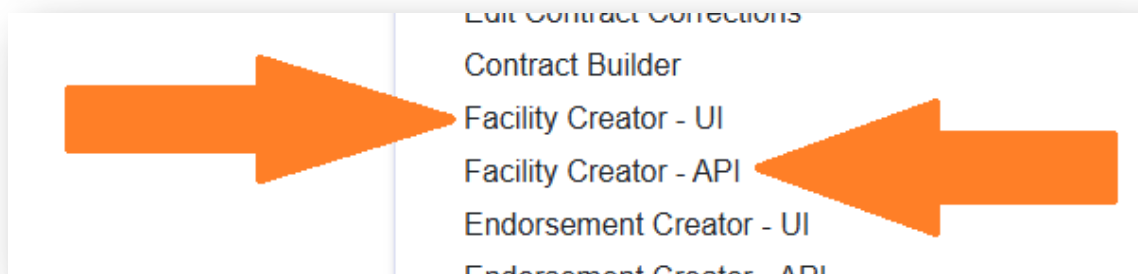
The label then appears within the box associated with that team, and can be removed by clicking the 'x' at the end of the label. When you have set all team permissions needed, click 'Confirm' and then 'Save'.



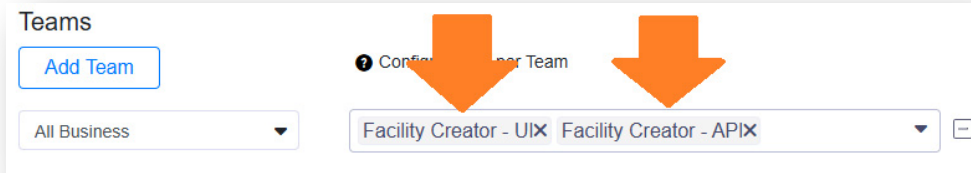
5g-xii. Brokers Only: Facility Creator UI/API Permissions

This permission grants the broker user the ability to create new facility agreements within the platform (for the UI permission) and/or via API Calls (for the API permission).

To give a broker either/both of the 'Facility Creator' permissions, click on the down-arrow at the right-hand side of the long box next to the name of the team in question, and click 'Facility Creator UI [or API]' from the drop-down that opens.



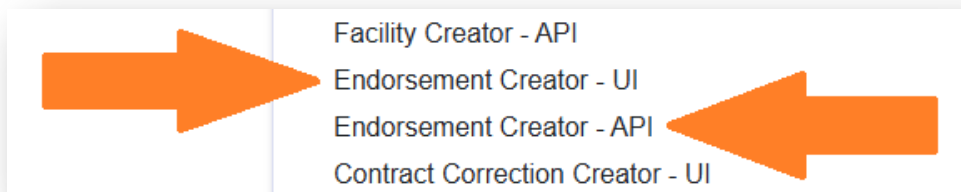
The label then appears within the box associated with that team, and can be removed by clicking the 'x' at the end of the label. When you have set all team permissions needed, click 'Confirm' and then 'Save'.



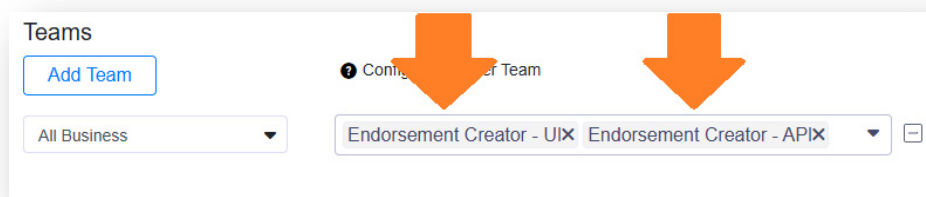
5g-xiii. Brokers Only: Endorsement Creator UI/API Permissions

This permission gives the broker user the ability to create an endorsement on a risk or a firm order with written lines within the platform (for the UI permission) and/or via API Calls (for the API permission).

To give a broker either/both of the 'Endorsement Creator' permissions, click on the down-arrow at the right-hand side of the long box next to the name of the team in question, and click 'Endorsement Creator UI [or API]' from the drop-down that opens.



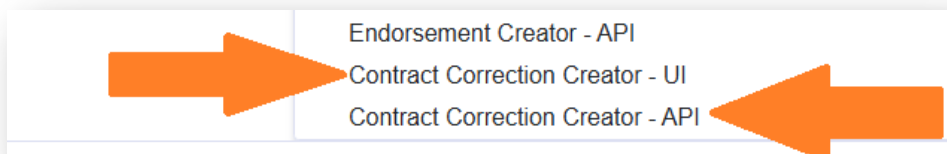
The label then appears within the box associated with that team, and can be removed by clicking the 'x' at the end of the label. When you have set all team permissions needed, click 'Confirm' and then 'Save'.



5g-xiv. Brokers Only: Contract Correction UI/API Permissions

This permission grants the broker user the ability to open a new blank contract correction document to a contract in the platform (for the UI permission) and/or via API Calls (for the API permission).

To give a broker either/both of the 'Contract Correction' permissions, click on the down-arrow at the right-hand side of the long box next to the name of the team in question, and click 'Contract Correction UI [or API]' from the drop-down that opens.



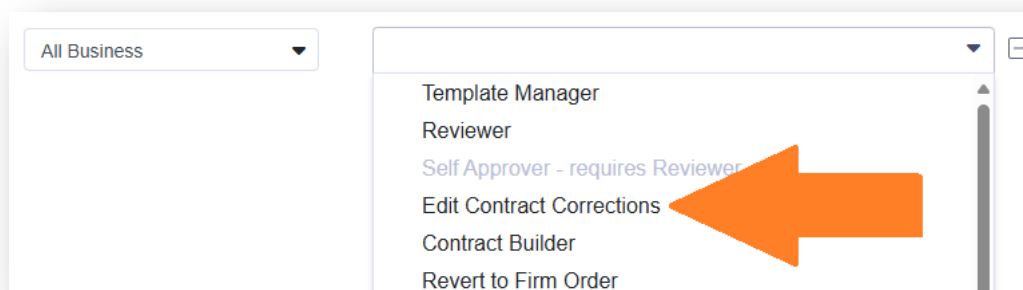
The label then appears within the box associated with that team, and can be removed by clicking the 'x' at the end of the label. When you have set all team permissions needed, click 'Confirm' and then 'Save'.



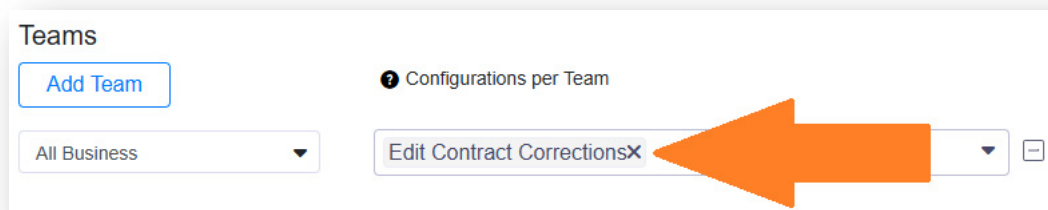
5g-xv. Brokers Only: Edit Contract Corrections Permissions

This permission enables broker users to populate, progress and finish blank corrections.

To give a broker the 'Edit Contract Corrections' permission, click on the down-arrow at the right-hand side of the long box next to the name of the team in question, and click 'Edit Contract Corrections' from the drop-down that opens.



The label then appears within the box associated with that team, and can be removed by clicking the 'x' at the end of the label. When you have set all team permissions needed, click 'Confirm' and then 'Save'.



5g-xvi. Commercial Implications of User Roles

A user's role/s can have direct commercial and/or financial implications. Please be aware of these before assigning users. If you are in any doubt, please email hello@whitespace.co.uk in order to seek clarification.

- **'Free Administrator'**: As the name suggests, a 'Free Administrator' is able to carry out the full administrator function without incurring charges. To create a 'Free Administrator' user set their status to 'ReadOnly', their 'Administrator' flag to 'Yes' and do **not** assign them to any teams.
- **'Free Librarian'**: 'ReadOnly' users without teams can also be given permission to access and make changes to the Contract Library without incurring charge. To activate this permission, set their 'Library Access' flag to yes.

Please note: since the Contract Builder creates new contracts in one of a user's teams, free Librarians cannot make use of it.

- **'Free Clause Manager'**: A 'Free Librarian' user can be given the 'Clause Management' permission, allowing them to create and edit Library content of the 'Clause' Line Item type, without impacting their free/paid status.

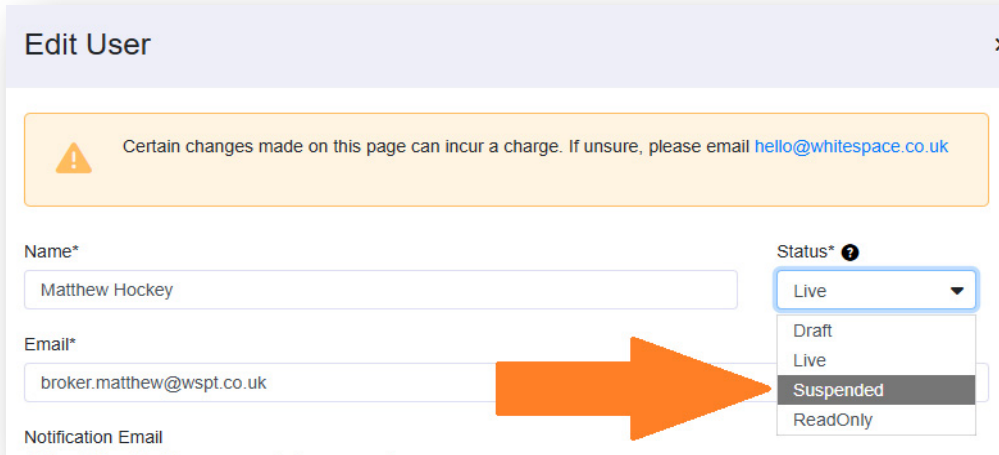
Any one user can be both a 'Free Administrator' and a 'Free Librarian' (with or without 'Clause Manager' permission), if required.

5h. Removing Users

For legal reasons, saved users cannot be deleted from the user list. Instead, they must be suspended.

This prevents all platform access and ensures that their name does not show as part of any teams on the platform. To suspend a user, edit their user details by clicking anywhere on their entry in the user list of the Users panel. You can type their name or email into the 'Search' box at top right to filter the list and find them quickly.

In the Edit User box, click on their 'Status' entry towards the top right, and select 'Suspended' from the drop-down list. You can also remove them from any teams by clicking the small '-' box at the end of the team's entry in the 'Teams' list.



The screenshot shows the 'Edit User' interface. At the top, there is a warning banner: 'Certain changes made on this page can incur a charge. If unsure, please email hello@whitespace.co.uk'. Below this, there are three input fields: 'Name*' (containing 'Matthew Hockey'), 'Email*' (containing 'broker.matthew@wspt.co.uk'), and 'Notification Email'. To the right of the 'Name*' field is a 'Status*' dropdown menu. The dropdown is open, showing four options: 'Live', 'Draft', 'Suspended', and 'ReadOnly'. An orange arrow points from the 'Email*' field towards the 'Suspended' option in the dropdown menu.

Best Practice: Though suspended users cannot access the platform, and have no access to the admin portal, library, or MI Report functionality, it is safer to ensure those options are set to 'No'.

When ready, click 'Confirm' and then 'Save'.

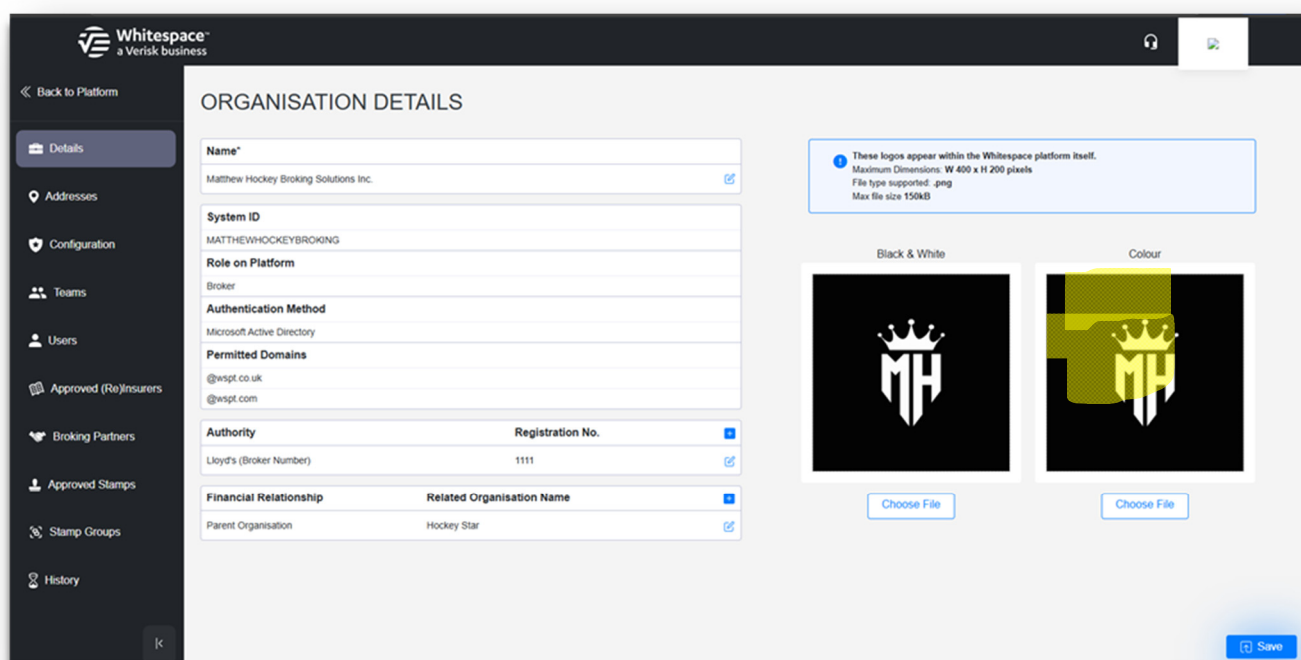
Remember to mention suspended users to your account manager and email details to support@whitespace.co.uk for billing calculations.

6. Configuring the Organisation's Logos

Your organisation's colour logo appears throughout the platform – on your user's dashboards, exported PDFs, contracts sent, endorsement agreements put down, when selecting organisations from a list, and more. The black and white logo appears on most stamps, and other places. Therefore, it is important to have logos correctly configured.

Before setting logos, make sure to have the image files prepared. You will need two files, one black and white/greyscale, and one full colour. These should depict the same logo. The files must be in .png format, with maximum width of 400px, maximum height of 200px, and a maximum file size of 150kb.

When you have your logo files ready, click on 'Details' in the admin portal's sidebar to navigate to the 'Organisation Details' pane.



For the greyscale logo, click the 'Choose File' button under the 'Black & White' logo space, navigate to and select the black and white/greyscale logo file, click 'Open', and then click 'Save'.

Please note: If you only have access to a colour logo, the 'Black & White' logo box will convert it to a functional greyscale version, but for the best results, please use internally-created greyscale logos.

Similarly, for the colour logo, click the 'Choose File' button under the Colour logo space, navigate to and select the colour logo file, click 'Open', and then 'Save'. If you only have access to a greyscale logo, you can upload it into this box to use it in places where a full-colour logo would normally display.


7. Editing the Organisation's Details


It is possible to enter a range of organisational details into the admin portal. Your chosen organisation name is displayed throughout the platform, and for re/insurers, details of your authority registration codes are used in conjunction with your stamps, but the rest of the details covered in this section are intended for future use against eventual compliance needs, and are not currently displayed or used in any location outside of the admin portal panels concerned.

7a. Organisation Name

To edit your organisation's displayed name, click on the blue pen-and-paper icon at the end of the name just below the 'Organisation Details' heading.

ORGANISATION DETAILS


Name*	
Matthew Hockey Broking Solutions Inc.	




You can then type and edit the name freely in the box. When ready, click the blue 'tick' icon to continue with the changes, or the black 'x' icon to discard the edits. If you have made a change, click 'Save'. The name can be changed freely at any time.

7b. Financial Relationships

The 'Financial Relationship' list permits you to enter the names of financially-related organisations. Click the blue '+' icon at the end of that header bar to add a new line, then click on the drop-down box to open a list of possible financial relationships.


Financial Relationship	Related Organisation Name	
Parent Organisation	Parent Organisation.plc	




Select the appropriate option – for example, 'Parent Organisation' for the organisation that yours is a subsidiary of. In the adjacent field, type the organisation's name. When ready, click the blue 'tick' icon to continue, or the red 'trash can' icon to delete the line you added. If you have made a change, click 'Save'. Financial relationships can be edited or deleted freely at any time by clicking the blue pen-and-paper icon.

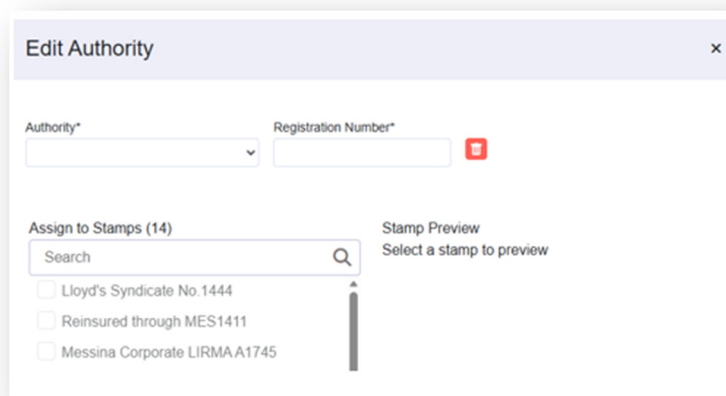
7c. Authority

The 'Authority' list allows you to enter information about your registration numbers and codes issued to your organisation by market authorities such as Dun & Bradstreet or Lloyd's.

Authority	Registration No.	
Lloyd's (Broker Number)	1111	



Click the blue '+' icon at the end of that header bar to add a new line, click the first drop-down box to select the appropriate authority registration, and type the relevant details into the adjacent box/es.



You can then associate the newly-created Authority code with your existing stamps by ticking them in the list below.

All organisations may add Dun & Bradstreet D-U-N-S Numbers. Brokers may also add Lloyd's of London Broker Numbers, and Re/Insurers may also add Lloyd's of London Syndicate Numbers. When ready, click the blue 'tick' icon to continue, or the red 'trash can' icon to delete the line you added. If you have made a change, click 'Save'. Authority details can be edited or deleted freely at any time by clicking the blue pen-and-paper icon.

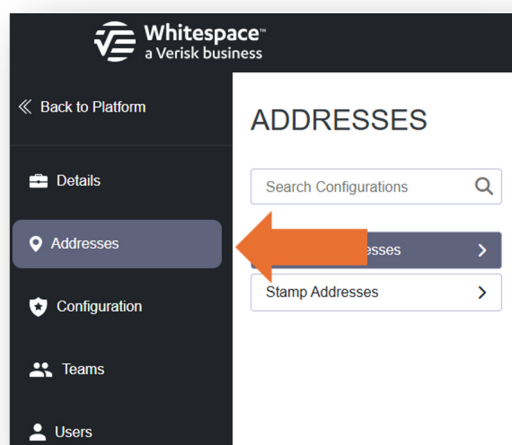
The 'Code' value can always be updated freely, automatically updating for all new instances of the stamps it is associated with. To change an 'Authority' type or delete an entry entirely, it must first be removed from all stamps.

Click the Authority code's 'Edit' icon. If the 'Authority' dropdown field and red trashcan icon are not available, untick all assigned stamps and click 'Confirm'. The window closes, updating the Authority entry's status. Then click the 'Edit' icon again to reopen the window with all options available.

We **strongly** recommend you verify that your organisation's D-U-N-S Number is correctly configured and associated with your stamps.

7d. Addresses

To add physical addresses for your organisation, click on the 'Addresses' panel.

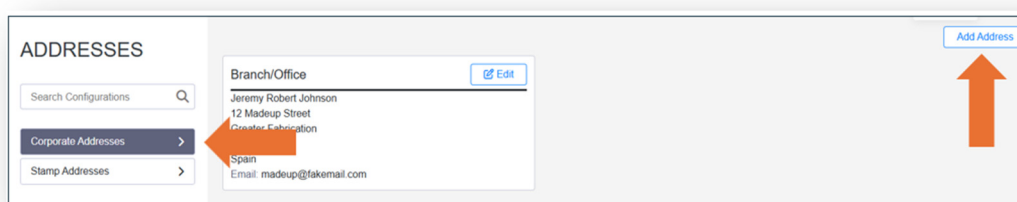


Any addresses that you have already added will be displayed here. These can be freely edited at any time by clicking the 'Edit' button above the address. Edits are made using the same interface as when adding a new address.

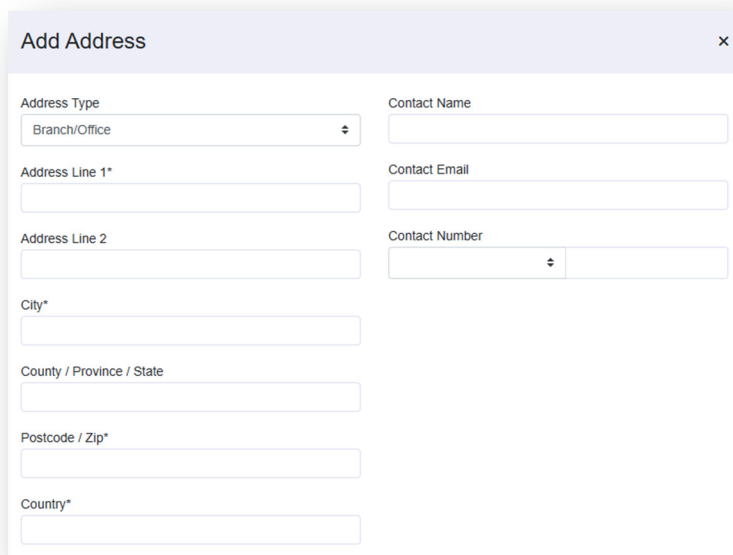
There are two types of address:

- 'Corporate Addresses' are currently only used within your organisation's Admin Portal, although future use in the Platform is possible.
- 'Stamp Addresses' are for linking with individual stamps.

To add an address, click the type of address you wish to add, whether corporate or stamp address, then click 'Add Address' in the upper right of the panel.



For Corporate addresses, select the business function of the address from the drop-down list in the 'Address Type' box, and then click and type in each field to add the relevant information. The mandatory fields are 'Address Line 1', 'City', 'Postcode/Zip', and 'Country'. When ready, click 'Confirm' to proceed, and then 'Save'. Corporate addresses are not available for associating with stamps. They are only visible from within the organisation's Admin Portal.



Stamp addresses do not accept details of individuals, and require D-U-N-S Numbers, but otherwise the fields are the same. Any stamp addresses added via the 'Stamp Addresses' tab can be selected when adding an address to a stamps, and any addresses added using the '+ Add Address' button when creating/editing a stamp will appear in the 'Stamp Addresses' tab.

Best Practice: No fields are validated by the system, so please double-check to avoid typos.

Please note at the current time, addresses cannot be completely deleted, but they can be blanked by placing a ‘ ’ or similar character in the mandatory fields and then confirming and saving.

8. Configuring Internal Review

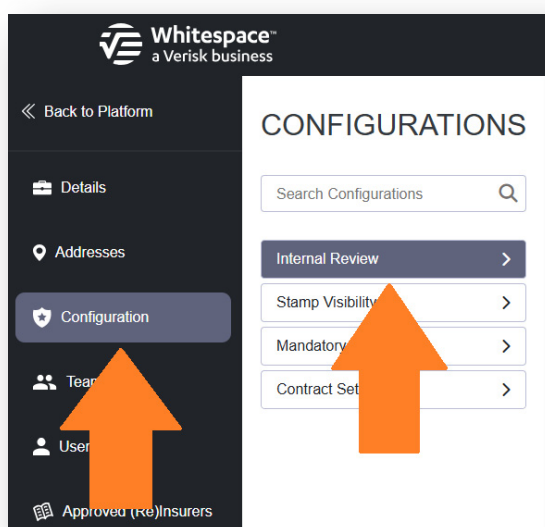
If a team includes at least one reviewer, team members may at any time choose to pass a contract to a designated reviewer for authorisation to proceed. That contract cannot be progressed or shown until the reviewer has approved it. This is referred to as ‘Internal Review’ in the Whitespace platform.

The opportunity to review a contract is available at several key stages in the placing process, and requires at least one user on each team who has been flagged as an ‘Internal Reviewer’ in the ‘User’ pane (See section 5g-v. *Internal Reviewer Permissions*).

By default, internal reviews are optional, but organisations can instead choose to make them mandatory for all users for one or more of the key contract stages.

Best Practice: When making internal review mandatory, it is vital to ensure that each team has a minimum of two internal reviewers – or, if necessary, one user with both ‘Reviewer’ and ‘Self-Approver’ status as, for security purposes, it is not otherwise possible for a user to authorise their own contracts.

To toggle the internal review functionality from optional to mandatory, select the admin portal’s ‘Configuration’ panel, and click on the ‘Internal Review’ configuration option.



Please carefully read the information in the internal review window:



The Contract Authorisation functionality can be made Mandatory or can remain Optional (the default) at a Corporate level. The functionality introduces the requirement/option for a second person within your Team to review and authorise a risk at key points in the placing process, as determined by this configuration.

If you leave this as Optional, it will be up to users to determine whether or not to request authorisation on a risk by risk basis. If you set this to Mandatory you should consider the following impacts and ensure that this has been communicated to users prior to making the change:

- A minimum of two 'Authoriser' users must be defined for every Team before you make the functionality mandatory.
- If no users are set as 'Authorisers' it will not be possible to progress a risk beyond the applicable mandatory status until an 'Authoriser' user is set up.
- An 'Authoriser' user may not authorise their own risk (where they are the owner/have submitted the risk for Authorisation) and therefore a minimum of two 'Authorisers' per team is required.
- Users will be prevented from showing/responding to a risk at the applicable mandatory status until the authorisation process has been completed.
- If a risk has been partially placed (i.e. has already been shown to or bound with a Carrier) it will be necessary to submit the risk for authorisation before it can be shown to any additional Carriers.

Optional Mandatory

- Draft - Indicative
- Draft
- Draft Bindable Quote
- Draft Firm Order
- Contract Correction
- Endorsement

To switch internal reviews from optional to mandatory, click on the toggle below the information box. When internal reviews are set to mandatory, a list of contract stages is displayed. To enforce reviews for a specific stage, tick the box to the left of the stage's name. When you are ready to proceed, click 'Save'.

9. Configuring Broking Partners (Brokers only)

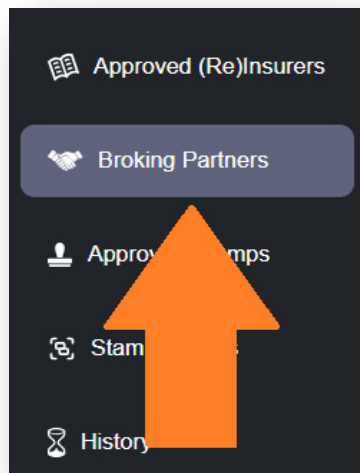
The Broking Partners system allows a 'producing' broker in one market to send a contract to a 'placing' broker in another market. The placing broker then negotiates – and places – the contract on behalf of the producing broker.

For full details, see the user guide **Connecting Brokers with the 'Broking Partners' System** in the knowledge base.

Best Practice: Since sharing business with another organisation is extremely sensitive, the Broking Partners functionality is disabled by default. Do not activate this functionality without making absolutely sure that it is the right choice for your organisation.

Before your users can act as producing brokers, the system must be turned on in the admin portal and the desired placing broker/s whitelisted as potential recipients.

To activate Broking Partners, navigate to the 'Broking Partners' panel by clicking 'Broking Partners' in the left-hand panel of the admin portal.



Please read the warning text, and then click on the toggle below to set the functionality to 'On'. While it is off, any already-whitelisted brokers will be displayed greyed out.

i The broking partners list specifies the organisations that your users are permitted to conduct broker-to-broker business with. To activate a broking partnership:

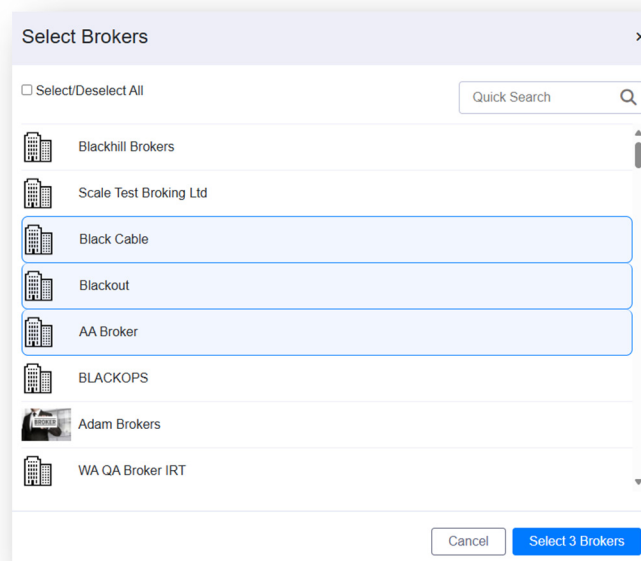
1. Enable the 'Broking Partners' functionality below by switching it to 'On'.
2. Add the required organisation to the list below.
3. Ensure that the organisation's entry in the list is set to 'Active'.

When the 'Broking Partners' functionality is set to 'Off, Brokers won't be able to share any Draft Contracts with their Broking Partners.

Off On

Click the 'Select Broking Partners' button to add a new broker to the whitelist.

The selection window shows a list of brokers on the platform. This can be scrolled or filtered by typing into the 'Search' box in the top right.

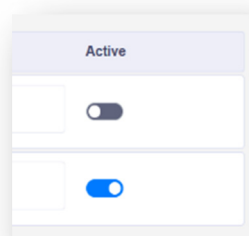


It is also possible to clear all selections by clicking the 'Select/Deselect All' button – please note, this ignores any filtering and always selects all the brokers in the platform – and then clicking it a second time.

Best Practice: It is strongly suggested that you not add all the platform’s brokers to your broking partners list, not least because new brokers are being added all the time, and new arrivals will not be automatically whitelisted.

When you have selected the broker/s to whitelist, click the blue 'Select' button, which displays the number of new organisations you have chosen, double-check your selections, and then click 'Save' to finalise those changes.

Broking Partners functionality can be activated or deactivated at any time. Whitelisted brokers cannot be deleted from the list, but they can be removed as potential placing brokers by clicking on their 'Active' toggle, turning it grey.



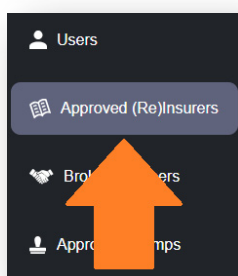
You can also freely type into/edit the 'Notes' field for a broker at any time. These notes are only displayed in this panel of the admin portal.

10. Configuring Approved (Re)Insurers (Brokers only)

The Approved (Re)Insurers functionality restricts users to only conducting business with underwriters from a specific list of organisations that have been manually added to a whitelist in the admin portal. When it is active, users can see the full list of (re)insurance organisations available as usual, but only those on the whitelist can actually be selected.

Best Practice: Enabling this functionality can have a significant impact on your organisation’s business, so do not activate it without making absolutely sure that it is the right choice for your organisation.

To enable/disable the system or add new (re)insurers to the whitelist, click on 'Approved (Re)Insurers' in the left-hand pane of the admin portal.






Read the warning text carefully, and click the toggle beneath it to enable (or disable) the restriction.

i The Approved (Re)Insurers List specifies the organisations that your users are permitted to conduct business with. When it is set to 'On', only users at organisations that are both (a) listed below and (b) set to 'Active' are available to your users. Please note that organisations cannot be removed from this list due to certain legal requirements. Setting their status to 'Inactive' makes them unavailable.

Off On

Whitelisted organisations are displayed in the table, and are greyed out when the functionality is off. This list can be scrolled, or filtered by typing into the search box above it. You can also freely type into/edit the 'Notes' field of a given organisation at any time. These notes are only visible in this panel of the admin portal.

Logo	Name	Notes	OFF PLATFORM	Extended Data Visibility	Active
	Tempo Partners Limited	<input type="text"/>	Yes	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	YU Underwriting	<input type="text"/>	No	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	Munich Reinsurance America Inc.	<input type="text"/>	Yes	<input type="checkbox"/>	<input checked="" type="checkbox"/>









To add a new organisation to the whitelist, click 'Select Underwriters'. The Approved (Re)Insurers system does not have to be set to 'On'.

The selection window shows the full list of unselected underwriters on the platform. This can be scrolled, or filtered by typing into the 'Search' box in the top right.

It is also possible to clear all selections by clicking the 'Select/Deselect All' button – please note, this ignores any filtering, and always selects all the underwriters in the platform – and then clicking it a second time.

Select Underwriters x

Select/Deselect All Quick Search

-  Offline Palermo
-  Wantage Underwriting
-  White Rabbit
-  Angelo Gorgone Underwriters
-  Satec SRL
-  GDF Underwriting
-  BARANTS Re
-  Avocados Carrier

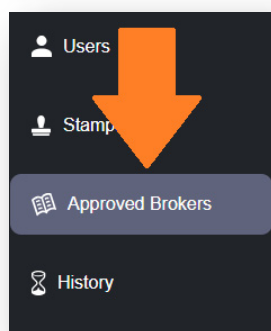
Best Practice: It is strongly recommended that you not add all the platform’s underwriting organisations to your Approved (Re)Insurers list, not least because new (re)insurers are being added all the time, and new arrivals will not be automatically whitelisted.

When you have selected the (re)insurer/s to whitelist, click the blue ‘Select’ button, which displays the number of new organisations you have chosen, double-check your selections, and then click ‘Save’ to finalise those changes.

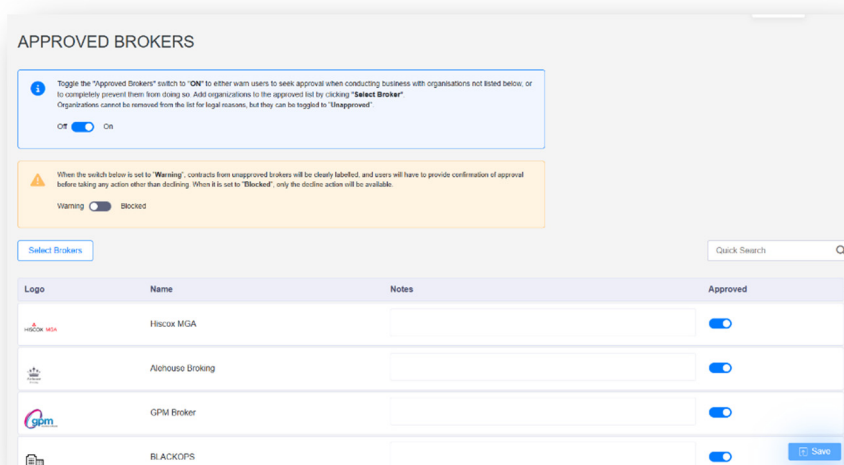
Please note: once saved, whitelisted (re)insurers cannot be deleted from the list, but they can be set as not approved by clicking on the ‘Active’ toggle, turning it grey. This prevents your users from conducting any business with them exactly as if they had not been added to the whitelist.

11. Approved Brokers (Re/Insurers only)

The Approved Brokers functionality restricts users to only conducting business with Brokers from a specific list of organisations that have been manually added to a whitelist in the admin portal. When it is active, users can see the full list of Broking organisations available as usual, but only those on the whitelist can actually be selected.

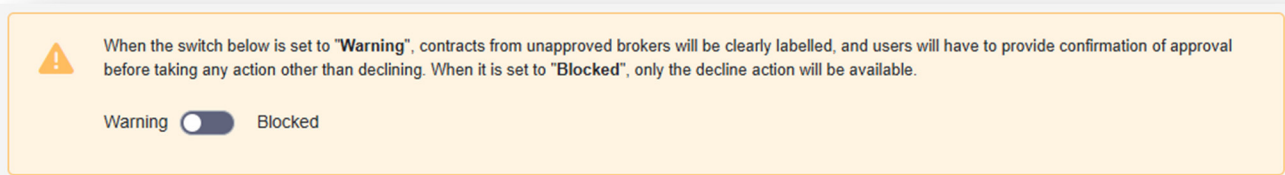


Best Practice: Enabling this functionality can have a significant impact on your organisation’s business, so do not activate it without making absolutely certain that it is the right choice for your organisation.



To enable/disable the system or add new Brokers to the whitelist, click on 'Approved Brokers' in the left-hand pane of the admin portal. Read the warning text carefully, and click the toggle beneath it to enable (or disable) the restriction.

Toggling the functionality on will present an additional warning. Please take care to read and respond to this warning as the behaviour of the functionality depends on the decision made at this stage:

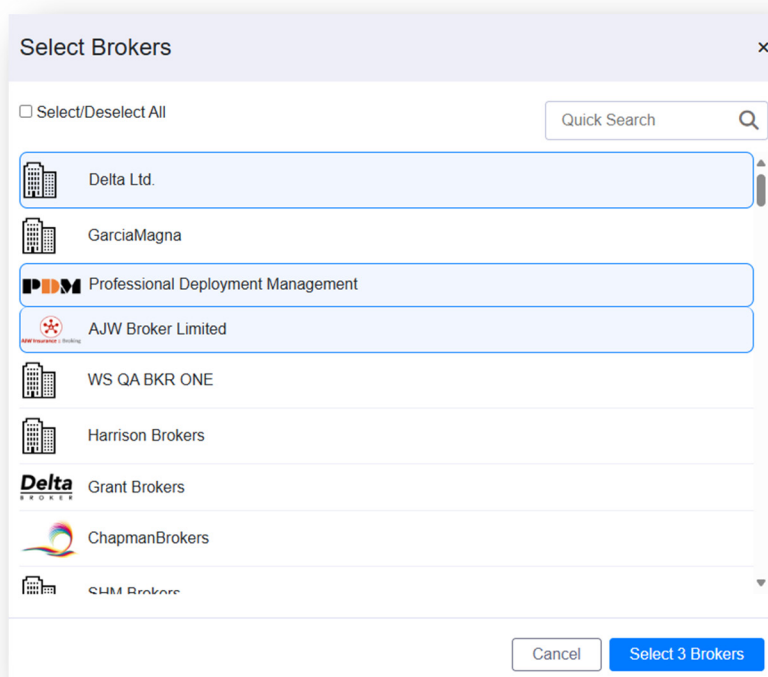


When set to 'Warning', contracts from non-whitelisted brokers will be labelled as such, and users will have to confirm that they have approval before action can be taken. If set to 'Blocked', contracts from non-whitelisted brokers can only be declined.

Whitelisted organisations are displayed in the table, and are greyed out when the functionality is off. This list can be scrolled, or filtered by typing into the search box above it. You can also freely type into/edit the 'Notes' field of a given organisation at any time. These notes are only visible in this panel of the admin portal.

To add a new organisation to the whitelist, click 'Select Brokers'. The Approved Brokers system does not have to be set to 'On'.

The selection window shows the full list of unselected underwriters on the platform. This can be scrolled, or filtered by typing into the 'Search' box in the top right.



It is also possible to clear all selections by clicking the 'Select/Deselect All' button – please note, this ignores any filtering, and always selects all the underwriters in the platform – and then clicking it a second time. It is strongly suggested that you not add all the platform's brokers to your Approved Brokers list, not least because new brokers are being added all the time, and new arrivals will not be automatically whitelisted.

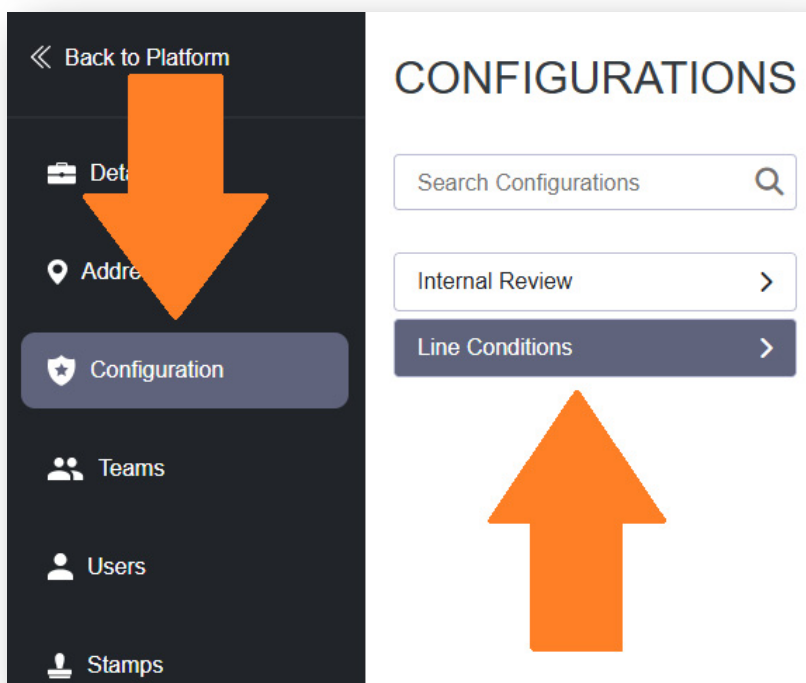
When you have selected the broker/s to whitelist, click the blue 'Select' button, which displays the number of new organisations you have chosen, double-check your selections, and then click 'Save' to finalise those changes.

Please note: once saved, whitelisted brokers cannot be deleted from the list, but they can be set as not approved by clicking on the 'Active' toggle, turning it grey. This prevents your users from conducting any business with them exactly as if they had not been added to the whitelist.

12. Managing Line Conditions (Re/Insurers only)

Underwriter users may specify the conditions under which they are writing a line on a contract. These are selected from a drop-down list of line conditions, pre-configured on a team-by-team basis in the admin portal.

Click on the 'Configuration' panel and select the 'Line Conditions' window.



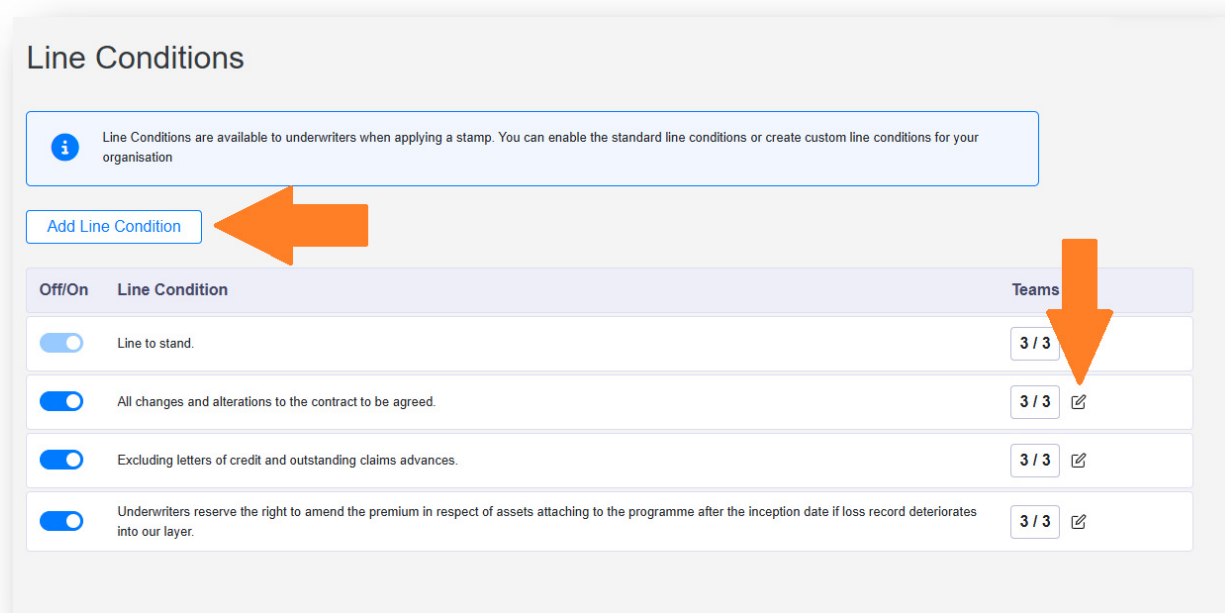
The window displays the list of line conditions available to your users. Each condition is shown in full, along with a switch to toggle it on or off, a summary of how many of your organisation's teams have access to the condition, and a button to edit the condition and the teams that can see it in the platform.

All underwriters have permanent access to the “Line to stand” condition. Several other standard conditions are also provided by default. All conditions other than “Line to stand” can be freely edited at any time.

You cannot completely delete an entry for a line condition once it has been saved. To make it unavailable, turn it off by clicking the Off/On toggle, or edit it to remove all the teams permitted to see it.

To add a new condition, click the ‘Add Line Condition’ button.

To edit an existing line condition, click on the pen-and-paper icon in its row.



Click and type in the ‘Line Condition’ box of the ‘Edit Line Condition’ window to specify the precise line condition to be made available to your users.

Click on a team name shown in the ‘Apply To Teams’ list in the lower portion of the window to tick or untick it, with the condition being visible to ticked teams.

You can click the ‘Select All’ button to tick all your organisation’s teams, and click the resulting ‘Unselect All’ button to untick them all. You can also type into ‘Search Teams’ box to filter team names by text typed.

When you are satisfied with the condition, click ‘Confirm’ to return to the ‘Line Conditions’ window, and then click ‘Save’.

Edit Line Condition
✕

Line Condition*

ENTER YOUR LINE CONDITION TEXT HERE. |

Apply To Teams*

Search Teams 🔍

Unselect All 3 / 3

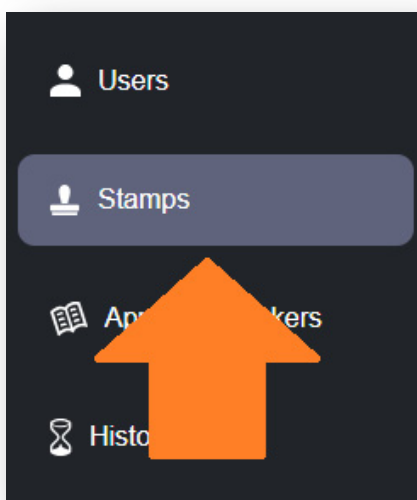
✓ All Business

✓ Off Platform Risks

✓ All Risks

13. Creating and Assigning Stamps (Re/Insurers only)

Stamps are created and their availability managed from the 'Stamps' panel of the admin portal.



Please note: Underwriter users cannot write lines on a contract without having at least one full stamp available to them, either individually or as part of a team.

New functionality available for stamp management includes granular stamp availability down to a user-by-user basis, carriage returns in stamp descriptions, detailed options for the organisational logos displayed on stamps, and more.

To manage your organisation's stamps or add new full or button stamps, click on 'Stamps' in the left-hand pane of the admin portal.

The Stamps panel shows a list summarising all your organisation's stamps. You can type into the 'Search' box to filter on the text of the 'Short Name' field or scroll the list if it is long enough.



To see a stamp in full detail, click on the three-dot icon at the end of the stamp's row, and select 'Preview Stamp'.

There are also several other options for filtering the list:

Click on the '**Type**' column heading to filter by full stamps, shown with a rectangular icon below, or button stamps, shown with a circular icon.

'**Stamp Category**' lets you filter by the authority associated with each stamp.

'**Enabled**' lets you filter for active or inactive stamps.

Finally, '**Validated**' lets you filter by validation status.

Please note: All new full stamps are manually validated by the Whitespace support team to ensure that they follow correct usage requirements. This does not need notification and may take up to two working days.

Valid stamps are available to be assigned for users to apply when writing lines and are shown in the 'Validated' column with a green tick icon.

Stamps that have not yet been validated are not visible to users in the platform and are shown with a red exclamation mark icon.

Old legacy stamps in existence at release 2.12 were automatically granted valid status and are shown with a grey question mark icon.

Button stamps are not validated, and so are immediately available for use once they have been saved.

Please note: when a new stamp is created it is automatically assigned to all teams as default. For any teams that should not have access to this stamp, an admin user must manually unassign it using the guidance shown below in section 13b. *Disabling stamps.*

It is possible to create a new stamp by duplicating a currently existing stamp. To do this click the three-dot icon at the end of the row of the stamp you wish to duplicate and select 'Duplicate Stamp'. This will bring up a window confirming all details of the copied stamp.

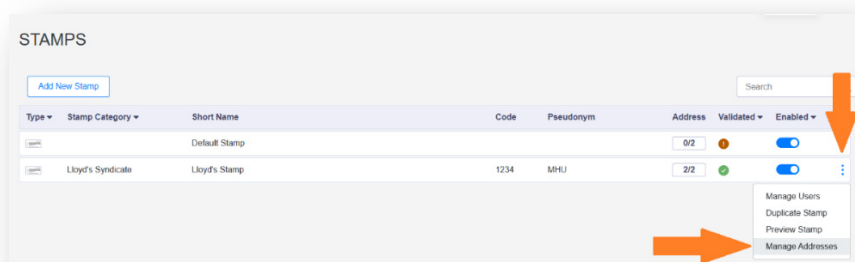
Please note: As stamps cannot be identical, it is not possible to finalise the stamp or assign it to any users until at least one value has been changed.

13a. Adding or Editing Stamp Addresses

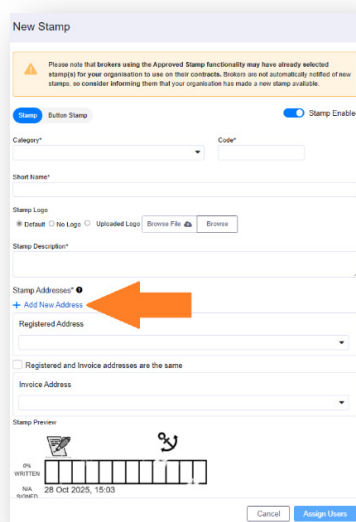
To ensure brokers are able to comply with regulatory requirements and perform full compliance checks, all stamps created since version 3.3.0/August 2025 include address information for the organisation's registered address.

Older existing stamps without address information can still be assigned to and used by underwriter teams as required. However, in order to complete an update to an existing stamp's details, this address must be present.

To add or update a stamp's address go to the Admin portal 'Stamps' panel as detailed above. Then click on the stamp's three-dot icon and select 'Manage Addresses'.



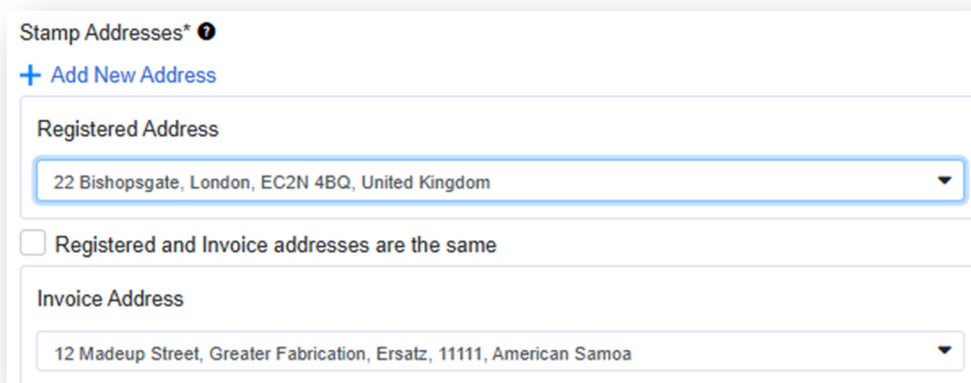
If there are no stamp addresses configured in the system yet, or you need to add a new one, click the '+ Add New Address' button.



Fill out the address form and click 'Add Address' when complete.

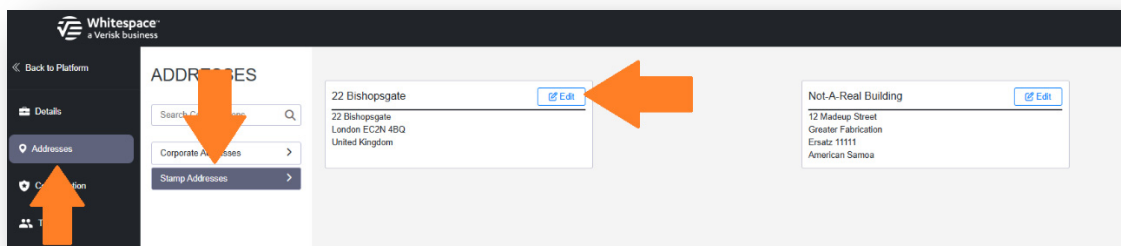
Organisations should add their 9-digit D-U-N-S Number in the 'DUNS Code' box.

To select either the registered address and/or invoice address click on the drop-down list and click the address you wish to select. You can tick the 'Registered and Invoice addresses are the same' box to use one address entry for both. Invoice addresses are optional.



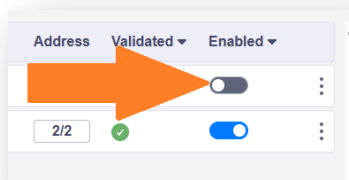
Open the 'Stamp Addresses' pane of the 'Addresses' tab to view, edit, and add addresses. Stamp addresses – and the addresses assigned to a particular stamp – can be freely updated.

Please note: Address changes are applied to new lines written with associated stamps. They do not update existing lines.



13b. Disabling Stamps

Please note that for legal reasons, stamps cannot be deleted or edited after they have been saved. To disable a stamp, hiding it from all platform users, click on its 'Enabled' status in the Stamps panel to toggle it to disabled, shown as dark grey, and click 'Save'.

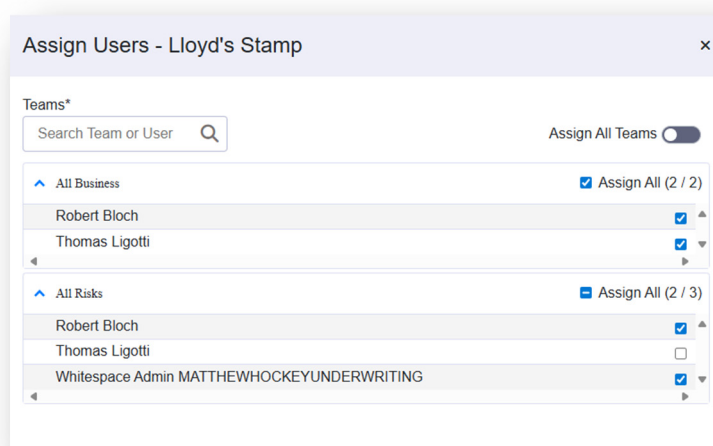


Once a stamp has been disabled it will no longer be visible in the list of available stamps and can no longer be used for signing new risks. However, it will remain present on any risks that it was used to sign prior to the stamp being disabled.

13c. Assigning Users to a Stamp

Users must be assigned to a stamp before they can see it or apply it in the platform.

The Assign Users window can be accessed from the Stamps panel by finding the row summarising the stamp to assign users for, clicking on the three-dot icon at the end of the row, and selecting 'Manage Users'. This window also appears as part of the process when first creating a new stamp.



By default, all teams are given access to a stamp, however you may use the 'Assign All Teams' toggle in the top right of the box to allow or disallow access to the stamp for all teams and users at once. An entire team's user list can be de/selected by toggling the 'Assign All' checkbox to the right of that team's name.

You may also click on the blue down-arrow to the left of a team's name to show the users on that team, and then select them individually as required using the checkbox to the right of their name/s. Manually selecting all the users on a team will automatically tick the team's 'Select All' checkbox.

You can also filter the list of teams and users by typing into the 'Search Team or User' box. The list will shrink to display only the names of individuals and/or teams matching the typed text, and these can then be selected as above. Please note that a user given access to a stamp under one team does not automatically get access to that stamp when acting as part of a different team.

Once you are ready, click 'Confirm' and then 'Save' to apply the new availability. Stamp availability can be freely altered at any time.

13d. Lloyd's Syndicate Stamps

To create a new Lloyd's Syndicate stamp, click 'Add New Stamp', click 'Category', and select 'Lloyd's Syndicate' from the drop-down list.

Enter the syndicate's four-digit London registration number in the 'Code' field, and its three-capital letter pseudonym in the 'Pseudonym' field.

The stamp description should be completed as follows:

Lloyd's Underwriter Syndicate No. <Syndicate number> <Pseudonym>, <Location>

Example:

Lloyd's Underwriter Syndicate No. 1001 VRS, London, England



To set the stamp as disabled on validation, toggle the 'Stamp Enabled' switch in the top right.

To create a split stamp, tick the 'Split' box and enter the second syndicate's number and pseudonym in the new row. You must also add the split percentages for both rows, and ensure that they total 100%.

Please note: you can enter carriage returns into the stamp description as required, to improve stamp formatting and readability.

In the 'Short Name' field, enter text to precisely identify the stamp in the Stamps panel's display list. It is not used anywhere else and may be up to 40 characters in length.

Lloyd's syndicate stamps may display an organisational logo. To use the same logo as your organisation displays in the platform, click the 'Default' radio button under the 'Stamp Logo' heading.

To choose a logo specifically for that stamp, click on the 'Browse' button, navigate to a logo file on your computer, select it, and click 'Open'. Logos follow the same guidelines as for organisation logos, and are shown in greyscale.

To not show any logo, click the 'No Logo' button.

You may return to the most recently uploaded logo by ticking the 'Uploaded' radio button.

Stamp Addresses – select registered/invoice addresses from the dropdown list, using '+ Add New Address' to add an address to the list if needed.

Click 'Proceed' to progress to the 'Assign Users' screen, detailed in section 13c above, and click 'Confirm' and 'Save' when done.

Additionally, Service Agreement stamps settling via the Bureau should be created using the Lloyd's Syndicate category.

13e. Lloyd's Brussels Syndicate Stamps

To create a new Lloyd's Brussels syndicate stamp, click 'Add New Stamp', click 'Category', and select 'Lloyd's Brussels' from the drop-down list.

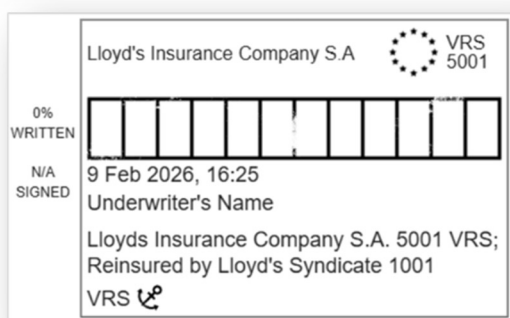
Enter the syndicate's four-digit Brussels registration number beginning with '5' in the 'Code' field, and its three-capital letter pseudonym in the 'Pseudonym' field.

The stamp description should be completed as follows:

Lloyd's Insurance Company S.A. <LIC Syndicate number> <Pseudonym>; Reinsured by Lloyd's Syndicate <Reinsuring Syndicate number> <Pseudonym>

Example:

Lloyds Insurance Company S.A. 5001 VRS; Reinsured by Lloyd's Syndicate 1001 VRS



To set the stamp as disabled on validation, toggle the 'Stamp Enabled' switch in the top right.

To create a split stamp, tick the 'Split' box and enter the second syndicate's Lloyd's Brussels number and pseudonym in the new row. You must also add the split percentages for both rows, and ensure that they total 100%.

Please note: Lloyd’s Brussels Syndicate stamps can additionally include settlement details, line slip agreements details, etc added to the stamp description.

In the ‘Short Name’ field, enter text to precisely identify the stamp in the Stamps panel’s display list. It is not used anywhere else, and may be up to 40 characters in length.

Although the logo bar is visible, Lloyd’s Brussels stamps cannot display organisational logos.

Stamp Addresses – select registered/invoice addresses from the dropdown list, using ‘+ Add New Address’ to add an address to the list if needed.

Click ‘Proceed’ to progress to the ‘Assign Users’ screen, detailed in section 13c above, and click ‘Confirm’ and ‘Save’ when done.

13f. Lloyd’s Consortium Stamps

To create a new Lloyd’s Consortium stamp, click ‘Add New Stamp’, click ‘Category’, and select ‘Consortium’ from the drop-down list.

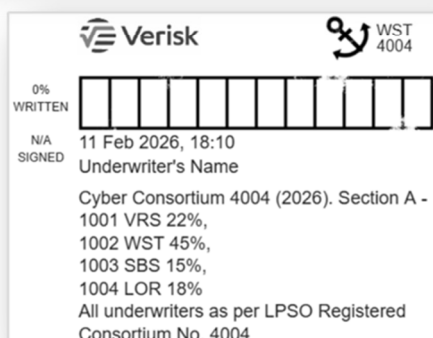
Enter the consortium’s 4-digit registered C&C (Consortium and Coverholder) number beginning with ‘3’, ‘4’, ‘6’, ‘7’, or ‘9’ in the ‘Code’ field, and the consortium leader’s Lloyd’s-registered three capital letter pseudonym in the ‘Pseudonym’ field.

The stamp description should be completed as follows:

<Consortium name> <Consortium number> <YOA> <Additional identifier, if applicable> <Capacity provider> - breakdown. All underwriters as per LPSO Registered Consortium No. <Consortium number>

Example:

Cyber Consortium 4004 (2026). Section A - 1001 VRS 22%, 1002 WST 45%, 1003 SBS 15%, 1004 LOR 18%. All underwriters as per LPSO Registered Consortium No. 4004



To set the stamp as disabled on validation, toggle the ‘Stamp Enabled’ switch in the top right. Consortium stamps cannot be created as always split.

In the 'Short Name' field, enter text to precisely identify the stamp in the Stamps panel's display list. It is not used anywhere else, and may be up to 40 characters in length.

Please note that you can enter carriage returns into the stamp description to improve stamp formatting and readability.

Lloyd's consortium stamps may display an organisational logo. To use the same logo as your organisation displays in the platform, click the 'Default' radio button under the 'Stamp Logo' heading. To not show any logo, click the 'No Logo' button. Finally, to choose a logo specifically for that stamp, click on the 'Browse' button, navigate to a logo file on your computer system, select it, and click 'Open'. Logos follow the same guidelines as for organisation logos, and are shown in greyscale. You may return to the most recently uploaded logo by ticking the 'Uploaded' radio button.

Stamp Addresses – select registered/invoice addresses from the dropdown list, using '+ Add New Address' to add an address to the list if needed.

Click 'Proceed' to progress to the 'Assign Users' screen, detailed in section 13c above, and click 'Confirm' and 'Save' when done.

Certain company markets (ILU or LIRMA) may also form part of a consortium. For pre-defined Lloyd's Consortium splits with company market stamps, set up 2 separate stamps – 1) consortium and 2) ILU/LIRMA. The underwriters should then split their line between the consortium and company market stamps manually when writing the line on the contract. In rare circumstances, where more than one leader is appointed within a consortium, versions of the stamp may be set up by both designated leaders.

13g. Lloyd's Coverholder Stamps

To create a new Lloyd's Coverholder stamp, click 'Add New Stamp', click 'Category', and select 'Consortium' from the drop-down list. To specify a Coverholder, you must tick the 'Coverholder' checkbox.

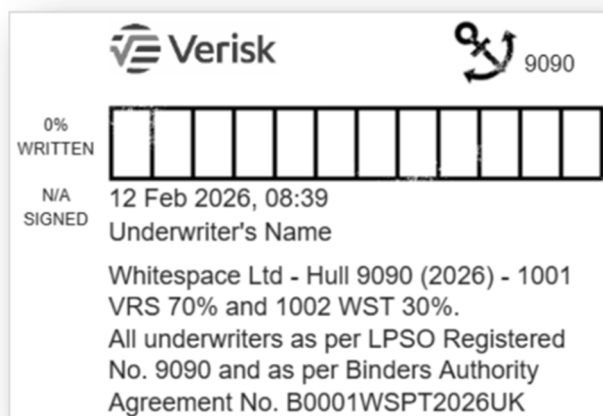
Enter the consortium's 4-digit registered C&C (Consortium and Coverholder) number beginning with '3', '4', '6', '7', or '9' in the 'Code' field. The 'Pseudonym' field is left blank.

The stamp description should be completed as follows:

<Coverholder Name> <Additional identifier> <Coverholder number> <YOA>
 <Capacity provider> - breakdown. All underwriters as per LPSO Registered No.
 <Coverholder number> and Binding Authority No. <Binders Authority Agreement
 number>

Example:

Whitespace Ltd - Hull 9090 (2026) - 1001 VRS 70% and 1002 WST 30%. All
 underwriters as per LPSO Registered No. 9090 and Binding Authority Agreement No.
 B0001WSPT2026UK



In the 'Short Name' field, enter text to precisely identify the stamp in the Stamps panel's display list. It is not used anywhere else, and may be up to 40 characters in length.

Please note that you can enter carriage returns into the stamp description to improve stamp formatting and readability.

Stamp Addresses – select registered/invoice addresses from the dropdown list, using '+ Add New Address' to add an address to the list if needed.

Click 'Proceed' to progress to the 'Assign Users' screen, detailed in section 13c above, and click 'Confirm' and 'Save' when done.

13h. Lloyd's Brussels Consortium Stamps

To create a new Lloyd's Brussels Consortium stamp, click 'Add New Stamp', click 'Category', and select 'Lloyd's Brussels Consortium' from the drop-down list.

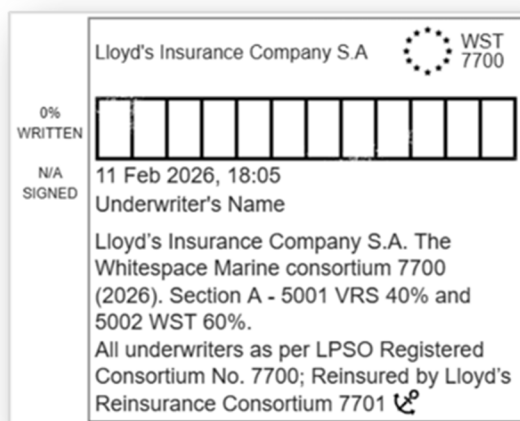
All Lloyd's Brussels Consortium stamps must include a 4-digit Consortium number beginning with '3', '4', '6', '7', or '9', and the Consortium leader's 3-letter pseudonym.

The stamp description should be completed as follows:

Lloyd's Insurance Company S.A. <Consortium name> <LIC Consortium number> <YOA>
 <Additional identifier, if applicable> <Capacity provider> - breakdown. All underwriters
 as per LPSO Registered Consortium No. <LIC Consortium number>; Reinsured by
 Lloyd's reinsurance consortium <Reinsurance Consortium number>

Example:

Lloyd's Insurance Company S.A. The Whitespace Marine consortium 7700 (2026).
 Section A - 5001 VRS 40% and 5002 WST 60%. All underwriters as per LPSO Registered
 Consortium No. 7700; Reinsured by Lloyd's Reinsurance Consortium 7701



In the 'Short Name' field, enter text to precisely identify the stamp in the Stamps panel's display list. It is not used anywhere else, and may be up to 40 characters in length.

Be Aware: It is **critical** that the registration numbers of the Lloyd's Brussels, LPSO, and Lloyd's Reinsurance consortiums all be present and clearly differentiated in the description.

Please note that you can enter carriage returns into the stamp description to improve stamp formatting and readability.

Although the logo bar is visible, Lloyd's Brussels consortium stamps may not display organisational logos.

A company market (ILU or LIRMA) may also form part of a Lloyd's Brussels Consortium. These should be set up and applied on the contract as separate stamps, as per the procedure described under Lloyd's Consortium stamps.

In rare circumstances, where more than one leader is appointed within a consortium, versions of the stamp may be set up by both designated leaders.

Stamp Addresses – select registered/invoice addresses from the dropdown list, using '+ Add New Address' to add an address to the list if needed.

Click 'Proceed' to progress to the 'Assign Users' screen, detailed in section 13c above, and click 'Confirm' and 'Save' when done.

13i. Lloyd's Brussels Coverholder Stamps

To create a new Lloyd's Brussels Coverholder stamp, click 'Add New Stamp', click 'Category', and select 'Lloyd's Brussels Consortium' from the drop-down list. To specify a Lloyd's Brussels Coverholder stamp, you must tick the 'Coverholder' checkbox.

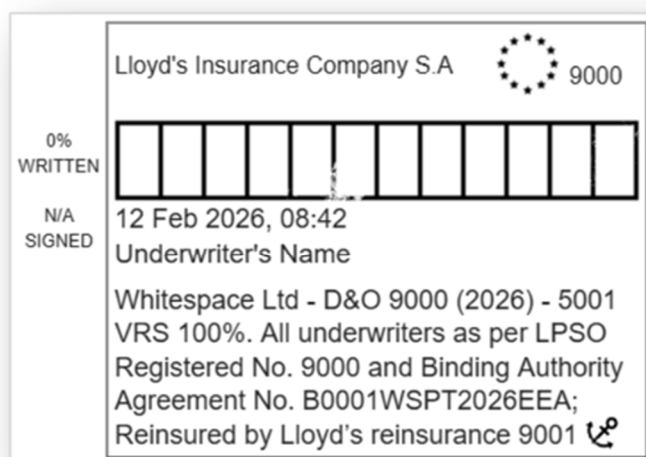
All Lloyd's Brussels Consortium stamps must include a 4-digit Consortium number beginning with '3', '4', '6', '7', or '9'. The 'Pseudonym' is left blank.

The stamp description should be completed as follows:

Lloyd's Insurance Company S.A. <Coverholder Name> <Additional identifier>
 <LIC Coverholder number> <YOA> <Capacity provider> - breakdown. All
 underwriters as per LPSO Registered No. <LIC Coverholder number> and Binding
 Authority No. <Binders Authority Agreement number>; Reinsured by Lloyd's
 reinsurance <Reinsurance Coverholder number>

Example:

Whitespace Ltd - D&O 9000 (2026) - 5001 VRS 100%. All underwriters as per
 LPSO Registered No. 9000 and Binding Authority Agreement No.
 B0001WSPT2026EEA; Reinsured by Lloyd's reinsurance 9001



In the 'Short Name' field, enter text to precisely identify the stamp in the Stamps panel's display list. It is not used anywhere else, and may be up to 40 characters in length.

Be Aware: It is **critical** that the registration numbers of the LPSO and Lloyd's Reinsurance coverholders all be present and clearly differentiated in the description.

Please note that you can enter carriage returns into the stamp description to improve stamp formatting and readability.

Although the logo bar is visible, Lloyd's Brussels consortium stamps may not display organisational logos.

Stamp Addresses – select registered/invoice addresses from the dropdown list, using '+ Add New Address' to add an address to the list if needed.

Click 'Proceed' to progress to the 'Assign Users' screen, detailed in section 13c above, and click 'Confirm' and 'Save' when done.

13j. MGA (Delegated Authority) Stamps

Please note that this stamp should be set up by the MGA (delegee) only.

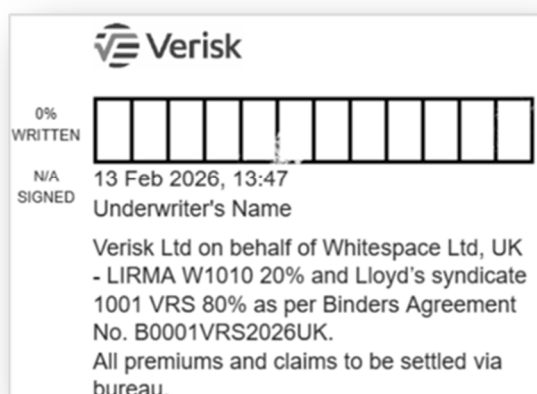
To create a new Bureau-settled Managing General Authority stamp, click 'Add New Stamp', click 'Category', and select 'MGA' from the drop-down list.

The stamp description should be completed as follows:

<MGA Name> on behalf of <Capacity provider> - breakdown as per Binders Authority Agreement Number <Binders number>. All premiums and claims to be settled via the Bureau.

Example:

Verisk Ltd on behalf of Whitespace Ltd, UK - LIRMA W1010 20% and syndicate at Lloyd's 1001 VRS 80% as per Binders Authority Agreement No. B0001VRS2026UK. All premiums and claims to be settled via the Bureau.



To set the stamp as disabled on validation, toggle the 'Stamp Enabled' switch in the top right. MGA stamps cannot be created as always split.

Best Practice: In the 'Stamp Description' field enter the full details/name of the delegate, followed by the text 'writing on behalf of' and then followed by the details of the delegated authority including the capacity behind it. It is best practice to end with the phrase "Premiums and claims are to be settled via Bureau".

Please note you can enter carriage returns into the stamp description to improve stamp formatting and readability.

In the 'Short Name' field, enter text to precisely identify the stamp in the Stamps panel's display list. It is not used anywhere else and may be up to 40 characters in length.

MGA stamps may display an organisational logo. To use the same logo as your organisation displays in the platform, click the 'Default' radio button under the 'Stamp Logo' heading. To not show any logo, click the 'No Logo' button. Finally, to choose a logo specifically for that stamp, click on the 'Browse' button, navigate to a logo file on your computer system, select it, and click 'Open'. Logos are shown in greyscale. You may return to the most recently uploaded logo by ticking the 'Uploaded' radio button.

Stamp Addresses – select registered/invoice addresses from the dropdown list, using '+ Add New Address' to add an address to the list if needed.

Click 'Proceed' to progress to the 'Assign Users' screen, detailed in section 13c above, and click 'Confirm' and 'Save' when done.

13k. Non-Bureau MGA Stamps

To create a new Managing General Authority stamp settled outside the Bureau, click 'Add New Stamp', click 'Category', and select 'Non-Bureau MGA' from the drop-down list.

In the 'Code' field, enter the UMR of the Binding Authority Agreement (up to 17 digits beginning with B), the Binders agreement number if different, or any other appropriate agreement number or code for the capacity behind the MGA, such as a D-U-N-S Number. **Please note:** the Code is not shown in the stamp. It must also be entered in the stamp description.

<MGA Name> on behalf of <Capacity provider> - breakdown as per the agreement < Binders number >. All premiums and claims to be settled via bureau.

Example:

Verisk Ltd on behalf of Whitespace Ltd, UK as per the agreement V2026WS001B. All premiums and claims to be settled directly with Verisk Ltd.



To set the stamp as disabled on validation, toggle the 'Stamp Enabled' switch in the top right. Non-Bureau MGA stamps cannot be created as always split.

In the 'Stamp Description' field, enter the details/name of the delegate, followed by the text 'writing on behalf of' and then followed by the details of the delegated authority including the capacity behind it, and the code. Include the details of the settlement process for premiums and claims.

Please note you can enter carriage returns into the stamp description as required, to improve stamp formatting and readability.

In the 'Short Name' field, enter text to precisely identify the stamp in the Stamps panel's display list. It is not used anywhere else, and may be up to 40 characters in length. Non-Bureau MGA stamps may display an organisational logo. To use the same logo as your organisation displays in the platform, click the 'Default' radio button under the 'Stamp Logo' heading. To not show any logo, click the 'No Logo' button. Finally, to choose a logo specifically for that stamp, click on the 'Browse' button, navigate to a logo file on your computer system, select it, and click 'Open'. Logos are shown in greyscale. You may return to the most recently uploaded logo by ticking the 'Uploaded' radio button.

Stamp Addresses – select registered/invoice addresses from the dropdown list, using '+ Add New Address' to add an address to the list if needed.

Click 'Proceed' to progress to the 'Assign Users' screen, detailed in section 13c above, and click 'Confirm' and 'Save' when done.

13l. LIRMA Stamps

To create a new stamp for a non-Lloyd's carrier settling premiums via the Bureau with a LIRMA number, click 'Add New Stamp', click 'Category', and select 'LIRMA' from the dropdown list.

In the 'Code' field, enter the five-character LIRMA code consisting of one capital letter followed by four digits, which cannot all be 0. This will appear on the stamp, and the logo 'XIS' will be added once the stamp is fully saved.

<Company Name>, <Additional identifier>, LIRMA <LIRMA Number>, <Location>

Example:

Whitespace Ltd, Causality, LIRMA W1010, Bermuda



To set the stamp as disabled on validation, toggle the ‘Stamp Enabled’ switch in the top right. LIRMA stamps cannot be created as always split.

In the ‘Stamp Description’ field, enter the full organisation name. It is good practice to follow this with the text “LIRMA” and the code.

Please note you can enter carriage returns into the stamp description as required, to improve stamp formatting and readability.

In the ‘Short Name’ field, enter text to precisely identify the stamp in the Stamps panel’s display list. It is not used anywhere else, and may be up to 40 characters in length.

LIRMA stamps may display an organisational logo. To use the same logo as your organisation displays in the platform, click the ‘Default’ radio button under the ‘Stamp Logo’ heading. To not show any logo, click the ‘No Logo’ button. Finally, to choose a logo specifically for that stamp, click on the ‘Browse’ button, navigate to a logo file on your computer system, select it, and click ‘Open’. Logos are shown in greyscale. You may return to the most recently uploaded logo by ticking the ‘Uploaded’ radio button.

Stamp Addresses – select registered/invoice addresses from the dropdown list, using ‘+ Add New Address’ to add an address to the list if needed.

Click ‘Proceed’ to progress to the ‘Assign Users’ screen, detailed in section 13c above, and click ‘Confirm’ and ‘Save’ when done.

13m. ILU Stamps

To create a new stamp for a non-Lloyd’s carrier settling premiums via the Bureau with an ILU number, click ‘Add New Stamp’, click ‘Category’, and select ‘ILU’ from the drop-down list.

In the ‘Code’ field, enter the 6- or 7-digit ILU code. The first digit of this code cannot be ‘0’. This will appear on the stamp, and the logo ‘XIS’ will be added once the stamp is fully saved.

To set the stamp as disabled on validation, toggle the ‘Stamp Enabled’ switch in the top right. ILU stamps cannot be created as always split.

In the 'Stamp Description' field, enter the organisation name. It is good practice to follow this with the text "ILU" and the code.

<Company Name>, <Additional identifier>, ILU <ILU Number>, <Location>

Example:

Whitespace Ltd, Property, ILU 4004001, UK



Please note you can enter carriage returns into the stamp description as required, to improve stamp formatting and readability.

In the 'Short Name' field, enter text to precisely identify the stamp in the Stamps panel's display list. It is not used anywhere else, and may be up to 40 characters in length.

ILU stamps may display an organisational logo. To use the same logo as your organisation displays in the platform, click the 'Default' radio button under the 'Stamp Logo' heading. To not show any logo, click the 'No Logo' button. Finally, to choose a logo specifically for that stamp, click on the 'Browse' button, navigate to a logo file on your computer system, select it, and click 'Open'. Logos are shown in greyscale. You may return to the most recently uploaded logo by ticking the 'Uploaded' radio button.

Stamp Addresses – select registered/invoice addresses from the dropdown list, using '+ Add New Address' to add an address to the list if needed.

Click 'Proceed' to progress to the 'Assign Users' screen, detailed in section 13c above, and click 'Confirm' and 'Save' when done.

13n. Non-Bureau Stamps

To create a new full stamp that does not fall into any of the existing categories, click 'Add New Stamp', click 'Category', and select 'Non-Bureau' from the drop-down list.

The stamp description should be completed as follows:

<Company Name> <Location>

Example:

Whitespace Software, part of Verisk Analytics, Inc, London branch.



To set the stamp as disabled on validation, toggle the ‘Stamp Enabled’ switch in the top right. Non-bureau stamps cannot be created as always split.

In the ‘Stamp Description’ field, enter the regular details of your organisation.

Please note you can enter carriage returns into the stamp description as required, to improve stamp formatting and readability.

In the ‘Short Name’ field, enter text to precisely identify the stamp in the Stamps panel’s display list. It is not used anywhere else, and may be up to 40 characters in length.

Non-Bureau stamps may display an organisational logo. To use the same logo as your organisation displays in the platform, click the ‘Default’ radio button under the ‘Stamp Logo’ heading. To not show any logo, click the ‘No Logo’ button. Finally, to choose a logo specifically for that stamp, click on the ‘Browse’ button, navigate to a logo file on your computer system, select it, and click ‘Open’. Logos are shown in greyscale. You may return to the most recently uploaded logo by ticking the ‘Uploaded’ radio button.

Stamp Addresses – select registered/invoice addresses from the dropdown list, using ‘+ Add New Address’ to add an address to the list if needed.

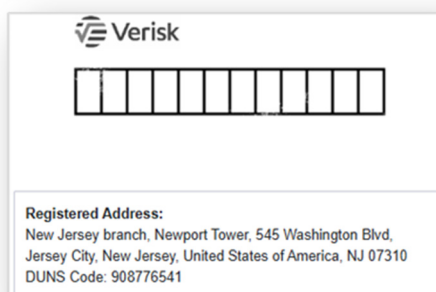
Click ‘Proceed’ to progress to the ‘Assign Users’ screen, detailed in section 13c above, and click ‘Confirm’ and ‘Save’ when done.

13o. Policy Number Only Stamps

A ‘Policy Number Only’ stamp is used by insurers based in the USA where only a policy number and registered address is required on the stamp.

The stamp description field is optional for these stamps, and if populated is displayed beneath the reference box.

The policy number is added to the reference box when the stamp is applied on the contract.



13p. Button Stamps

To create a new button stamp, click 'Add New Stamp', and click the grey 'Button Stamp' oval next to the blue 'Stamp' oval in the top left corner.

By default, button stamps display a Lloyd's of London logo, but this can be removed or altered to a Lloyd's Brussels logo or to display no logo by clicking the 'Button Stamp Template' drop-down and selecting 'Lloyd's Brussels' or 'Other' respectively from the list.

Enter your consortium number or other reference into the 'Code' field, using four digits for Lloyd's of London, four digits beginning with '5' for Lloyd's Brussels, or up to eight alphanumeric digits for other button stamps.

In the 'Stamp Description' field, you may enter up to 25 characters of text to display on the stamp, and in the 'Short Description' field, enter text to precisely identify the button stamp in the Stamps panel's display list. It is not used anywhere else, and may be up to 15 characters in length.

Click on your preferred stamp layout from the three options provided to select it. You may choose to hide the Lloyd's symbol on Lloyd's template buttons, which is functionally equivalent to selecting an 'Other' template button stamp.

Button stamps may not include organisational logos or carriage returns.

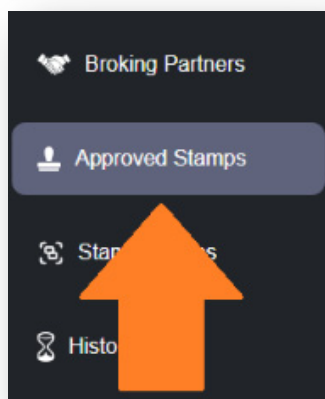
Click 'Proceed' to progress to the 'Assign Users' screen, detailed in section 13c above, and click 'Confirm' and 'Save' when done.

Please note button stamps are not validated by Whitespace Support, so as soon as they have been saved, they are final, non-editable, and ready for use.





14. Using the Approved Stamps Tab (Brokers Only)

To give brokers more granular control over placing business, the 'Approved Stamps' functionality includes approval over the specific stamps that underwriters can select when writing a line. This functionality allows for the setting of individual stamps as unapproved or approved.

The Approved Stamps tab can be accessed via the left-hand menu.



The approved stamps tab shows all approved (re)insurers in a list of expandable entries.

APPROVED STAMPS					
Stamp Category	Stamp Description	Code	Pseudonym	Address	Approved
	Hutton-Penman Underwriting Brussels Limited.				Stamps 8/8 <input checked="" type="checkbox"/>
	Malak Sedarous Underwriter				Stamps 0/0 <input type="checkbox"/>
	MPG Insurance				Stamps 0/1 <input type="checkbox"/>
	Munich Reinsurance America Inc.				Stamps 1/1 <input checked="" type="checkbox"/>

Please note: In order to appear in the 'Approved Stamps' tab list, the (re)insurer must first have been approved using the 'Approved (Re)insurers' function – see *10. Configuring Approved (Re)Insurers*.

Click an organisation's entry on the list in order to expand it. Once expanded it will show a list of all their available stamps. Use the 'approved' toggle beside each individual stamp to set that stamp as unapproved (grey) or approved (blue).

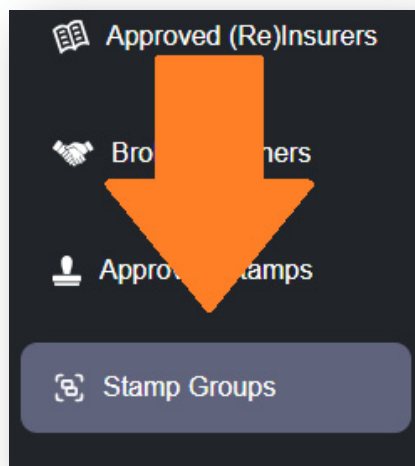
Clicking an organisation's 'approved' toggle approves or disapproves all of the organisation's stamps at once. Please be aware that this overwrites any previous approval settings.

Best Practice: When a (re)insurer creates a new stamp it **will not** be approved by default. You should check routinely to make sure all required stamps are approved.

You can also use the 'preview' button to view the stamp as it appears on contracts and can also use it to view all associated addresses.

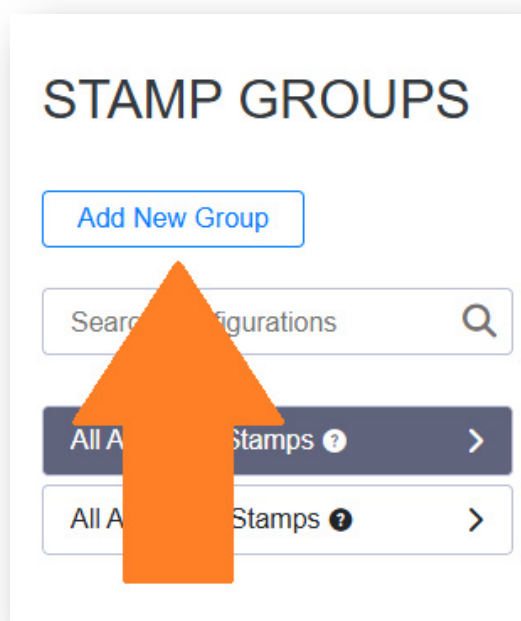
15. Utilising the Stamp Groups Functionality (Brokers Only)

Alongside approving/disapproving individual stamps (as detailed above in section 14), brokers can use the 'Approved Stamps' functionality to create groups of specific approved stamps that can be assigned to user teams. They are managed from the 'Stamp Groups' tab accessible from the left-hand list.



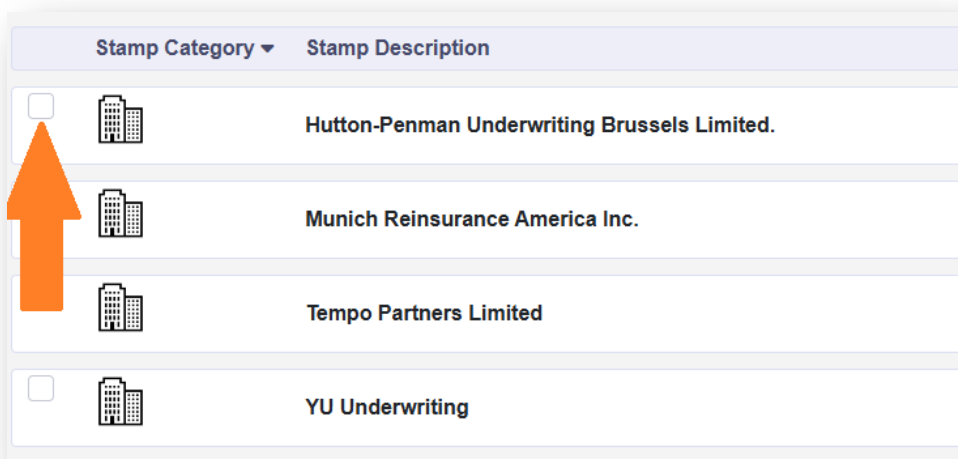
15a. Creating New Stamp Groups

To create a new stamp group, click the 'Add New Group' button, name the group, and select teams from the 'Assign Broking Teams' dropdown.



Click a (re)insurers name from the list to show all of their approved stamps – individual stamps can be selected, in order to include them in the group, or deselected to exclude them from the group.

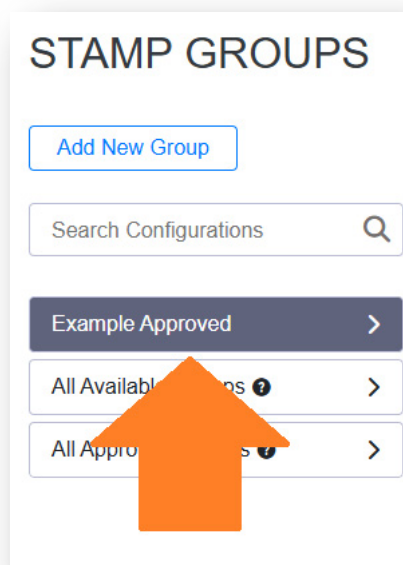
You can toggle all or none of a (re)insurers stamps for inclusion by ticking the box next to their logo.



When you are happy with the stamp group, click confirm, then save.

15b. Editing Stamp Groups

All saved groups are listed to the left of the stamp groups window.

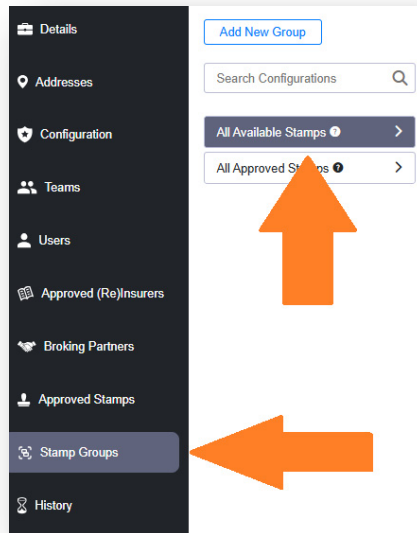


Click on a group name to view it in the main window. Stamp groups can be edited freely, and revisions applied to all contracts in teams using that group, including existing ones.

15c. The 'All Available Stamps' Group

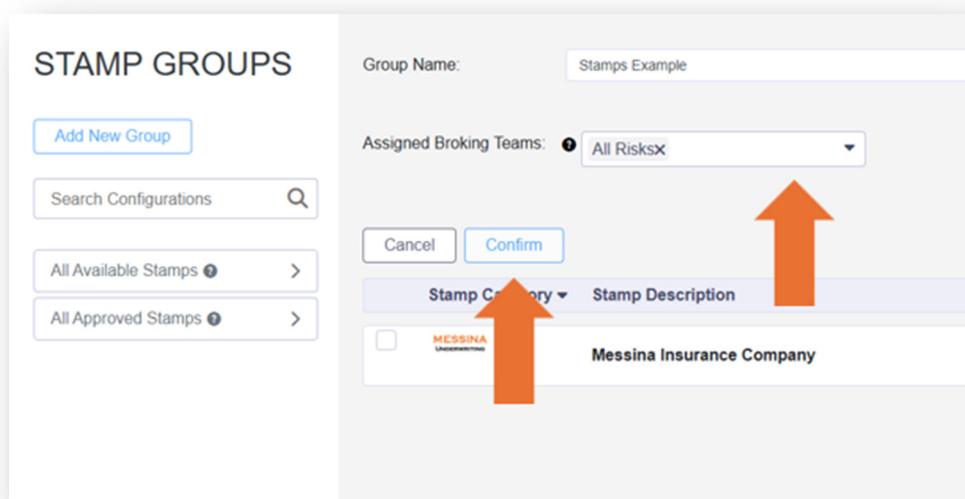
To permit brokers to manage the list of (re)insurers that they deal with but remove the need to manage any stamp approvals, the system now auto-creates a new Stamp Group which automatically includes all available stamps across all approved (re)insurers.

The 'All Available Stamps' group is accessed via the 'Stamp Groups' pane as described above.



This group is automatically generated. It is not user-editable and includes all active stamps for all (re)insurers listed under the 'Approved (Re)Insurers' functionality. As (re)insurers update their stamp lists, the group is updated to remain perfectly current.

To assign a user team to the 'All Available Stamps' group, select the group's name in the 'Stamp Groups' panel, select 'Edit Team Assignment', and add teams from the drop-down list.



15d. The 'All Approved Stamps' Group

The 'All Approved Stamps' group is auto-generated and is not editable. It is automatically assigned to teams that do not have any other stamp groups and contains all stamps that have been approved for use.

Click 'Edit Team Assignment' to add teams manually to this group. **Please note:** This will remove the team from all other groups.

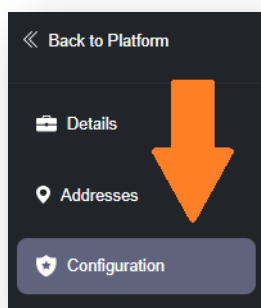
16. Enforcing Mandatory Tag Sets (Brokers Only)

Mandatory tag sets can be assigned to a template (and the contracts cloned from it) or to a contract at the draft stage. They list a selection of Defined Data tags that must be both present and correctly completed in the contract before it can be shown at firm order.

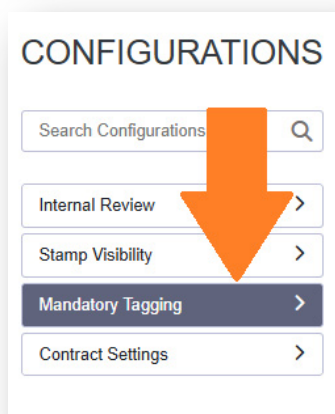
To help facilitate the user uptake of mandatory tag sets, it is now possible to enforce their use for all new contracts and templates created within one or more broker teams.

Please note: enforcing use of mandatory tag sets does **not** specify which mandatory tag set is to be included in any new template or contract, only that one is present.

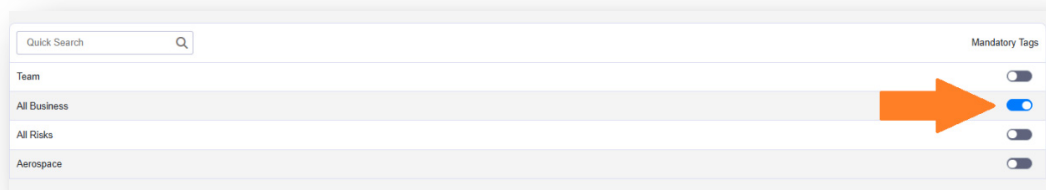
To enforce mandatory tag sets, first enter the 'Configuration' tab from the left-hand panel.



From there select the 'Mandatory tagging' tab.



Please ensure you read the alert at the top of the page, and then select which teams you wish to enforce mandatory tagging for by toggling the appropriate slider to the right of the screen.



Required mandatory tags for all teams can be toggled on and off by clicking the top 'Team' slider.