

Pending Firm Order and Endorsement Filters

Intro.

Two new filters have been added to the home screen for 'Pending' contracts. The options for brokers and carriers are 'Firm Orders – Pending' and 'Endorsements – Pending'. If a firm order or endorsement to a contract is pending, it requires a written line or endorsement agreement from an underwriter. If an underwriter has written a line with subjectivities not yet accepted by the broker, this contract will also be pending. These filters provide a new level of control when managing contracts on the home screen.

Users can see the pending filters by default on the left side of the home screen. Applying these filters will show pending firm orders or endorsements only, unless other status filters are enabled.

All firm orders and all endorsements can still be filtered using the Firm Orders and Endorsements filters.

