

Whitespace Platform

Provisional Release Notes v3.3.0

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Headlines

The Auto-Cascade feature progresses declarations through the placing process automatically.

Table formatting improvements give greater control over the appearance of tables in both the platform and exports.

Contract drafts can be freely renamed to make it easier when working with multiple drafts of the same contract.

New stamps must include the (re)insurer's registered address and invoicing address.

Release Details

Declarations Shown to a Facility Panel can be Set to Automatically Progress Through the Placing Process

When showing a declaration to a facility panel, the lead underwriter on the panel has to add their written line before the declaration can then be shown to other agreement parties or non/notify parties can be bound. This process requires the broker to repeatedly check the declaration and progress it manually. The new Auto-Cascade functionality waits for the leader to write their line then automatically shows the declaration to agreement parties for the broker and, once they have written their lines, binds non/notify parties and alerts the broker that the contract is ready to sign.

- Auto-Cascade can be set to default to active at the facility agreement level, and toggled to active or inactive by the broker whenever showing a declaration.
- Facility agreements have Auto-Cascade set to inactive by default. Changing the setting on a facility does not affect existing declarations.
- Each time a declaration is shown – to different facilities and/or with different sections – the broker can choose whether or not to set Auto-Cascade as active or inactive for that showing.
- When active, the declaration goes through the placing process automatically.
 - The broker shows the declaration to the facility leader as normal.
 - Once the leader writes their line, the declaration is automatically shown to any agreement parties.
 - When they have all written lines, all notify and non-notify parties are automatically bound.
 - The broker is notified that the declaration is ready for signing.
- If a line is withdrawn, refused, declined, or removed, Auto-Cascade is halted for that specific set of lines. The declaration must then be advanced manually for those lines.
- Similarly, if a line is written with a subjectivity response or line condition, the Auto-Cascade is paused for the line set. It resumes if the line is accepted, or halts if the line is declined.

Extended Formatting Options Make Tables More Versatile in Contracts

As part of the process of improving the appearance and versatility of tables in the Whitespace Platform, a number of new options have been introduced. These give users an increased range of tools for adjusting table formatting. All formatting changes are fully reproduced in exported PDFs and Word documents and the PDF Preview function.

- Tables can now be set in the same full range of font sizes as other text elements in the contract – 8pt, 10pt, 11pt, 12pt, 14pt, 15pt, 16pt, 18pt, and 20pt.
- When creating a new table, the initial font size defaults to 8pt text.
- Table and cell borders can be collectively hidden and unhidden as needed.
- The alignment of the entries in each column's cells can be set to left, centre, or right independently of the alignment of other columns.
- Header cells for each column can also be set to a different alignment than the entries in the rest of the table.

Draft Contracts can be Renamed to Eliminate Confusion When Working With Multiple Drafts

When first preparing a contract, it is common to create different versions of the draft to explore options on the market. Previously, drafts have been simply numbered. This makes tracking several draft versions unnecessarily difficult, so now drafts may be freely renamed.

- Contract drafts can now be freely renamed as necessary. The number displaying the order in which the contract's draft versions were created is shown prominently in each draft's icon, and is not adjustable.
- Draft names can be up to 75 characters long, and accept all regular text.
- When duplicating a named draft, the new version copies the existing name with an order number after it. So, duplicating a draft called 'Example' would create drafts named 'Example 1', 'Example 2', etc.
- Manual draft names are not carried through to later stages.

New and Updated Stamps Must Have the Organisation's Registered and Invoice Addresses

To ensure that brokers are able to comply with regulatory requirements and perform full compliance checks, all new stamps must include complete address information for both the organisation's registered and invoice addresses. Similarly, in order to complete an update to an existing stamp's details, both addresses must be present.

- All new full stamps added to the platform are required to include the (re)insurer's registered business address and their invoicing address. These addresses can be the same. If either is missing, the stamp cannot be created.
- Similarly, it is no longer possible to update stamp addresses for Whitespace-validated stamps without both of these stamp addresses being present. It remains possible to cancel a stamp update without adding addresses.
- Stamps that are pending Whitespace validation can also have their addresses added or updated to ensure that they meet this requirement. Any update to these stamps can only be completed when both addresses are present.
- Older stamps without address information can still be assigned to (and used by) underwriter teams as required.

The Precision of Automatic Decimal Places for Firm Order Line Guidance to a Declaration has Been Improved

To help brokers when assigning line guidance to a firm order declaration, a number of improvements have been made to the automatic calculation and rounding of precise line percentages. All of these calculations can be overridden by the broker.

- The Whitespace Platform can support seven decimal places of precision.
- When showing a firm order declaration to a facility, the 'Number of Decimals' drop-down field defaults to 'Auto'.
- When calculating fractional lines, automatic decimals default to rounding line percentages after four decimal places.
 - For example, a line percentage of 33.4257% would be unchanged, but a line percentage of 33.42576% would be rounded to 33.4258%.
- When the original facility agreement includes a written line with more than four decimal places then the automatic decimal calculation will start rounding at that degree of precision instead.
 - For instance, if the facility agreement includes a written line with six decimal places, the 'Auto' decimal will round a line with seven decimals to six decimals.
- If the rounded decimal values do not quite exactly match the order percentage, any fractional missing capacity is added to the first underwriter's proposed line, or any fractional excess capacity is removed from the last underwriter's line.
- The broker can manually override the number and value of the decimals being used at any time.

New Variants of the Library Link 'Book' Icon for Contract Headings Provide Increased Clarity

When a contract or template has been created using the Contract Builder, a template has been imported into the Library, or a contract has been created by cloning a previously-imported template, the contract headings contained in that contract or template are linked to their matching Library Line Items in the Contract Library. Similarly, when a Library Line Item is inserted into a contract, the resulting contract heading is also linked to its parent Library Line Item. This link is indicated by the presence of a book icon shown against the contract heading in Contract View. This icon has different colours depending on the current comparison of the exact contents of both the heading and Library Line Item.

- It is existing functionality that hovering over a book icon shows a brief summary of the state of the match between the contract heading and its linked Library Line Item. Likewise, clicking on the book icon above a contract heading's title brings up a box that clearly highlights any edits to the contract heading as compared to

the original version of its Library Line Item when the two were first aligned. If the Library Line Item has been updated since then, you can use the 'Insert latest Library version' functionality described above to compare the contract heading with the revised Library Line Item.

- The green book icon's functionality is unchanged. When the book icon is green, the contract heading and the Library Line Item are identical, with the possible exception of excluded data. Specific Defined Data fields in a Library Line Item can be excluded from comparison on a case-by-case basis in the Contract Library. This allows users to revise data fields that are expected to change from contract to contract – such as the inception date – without flagging the contract heading as different to the Library Line Item.
- If the book icon is yellow, the Library Line Item has been updated since the last time the contract heading was aligned with it. This status now unlocks the action to click to incorporate the revised Library Line Item into the contract, either replacing the contract heading or appearing below it. This functionality is detailed elsewhere in this document.
- When a yellow book icon also displays a red dot, both the contract heading and the Library Line Item have been revised since the last time the contract heading was aligned. The action to insert the latest version of the Library Line Item is also available in this state.
- The red book icon's functionality is also unchanged. The book icon turns red when the contract heading has been edited since the last alignment, but the linked Library Line Item has not changed. Internal Reviewers may want to ensure that these edits are acceptable by clicking on the red book to show the changes.
- A grey book icon indicates that the Library Line Item linked to the heading has been withdrawn from use in the Contract Library. Users should pay particular attention to this status as it may be necessary to significantly revise the contract heading.
- A red dot on a grey book icon indicates that in addition to the linked Library Line Item having been withdrawn, the contract heading has also been edited since the last time it was aligned with the Library.

Contract Library Improvements to Enhance Flexibility and Usability

To better reflect the range of contents that the Whitespace Platform supports under a contract heading, it is now possible to create Library Line Items for inline attachments – which are referenced in place in the contract and then provided as prefixes or appendices – and inline images, which are fully displayed in the contract under their contract heading. When templates and contracts are imported into the Contract Library, any inline images or attachments will also now be imported. Additionally, search boxes now more clearly display that they perform a search on the text within a Library Line Item, rather than its contract heading name. For convenience, an extra box has also been added next to them for specifying the Library Line Item's 'Group Name' filter so that users don't need to open the 'Filter' panel to access that identifier.

- When creating a new Library Line Item in the Contract Library, there is now an 'Inline Attachment/Image' option under the 'Library Line Item Type' dropdown in 'Core Information'. Select this to create a new Library Line Item for an inline attachment or inline image.
- Rather than the usual text editor in the 'Create New Library Line Item' editor, users are prompted to drop a PDF or image file into the Library Line Item.
- PDFs become inline attachments, and the user is able to choose whether the attachment is appended or prepended to the contract, to add reference text to appear in-line in the contract, and to add text as a title page for the attachment.
- Like contract headings in the platform, Library Line Items with inline images do not contain any text or tagged data. Inline attachments can have accompanying text that appears at the inline position of the contract and/or as a title page before the attachment.
- In earlier versions of the platform, it was not possible to import inline attachment and image contract headings into the Library when adding a template or contract. These types of contract headings will now be added to the Library correctly as new Library Line Items.
- To improve searching for specific Library Line Items in the Library's lists of content, the 'Group Name' metadata item now has its own drop-down filter selection box alongside the search box on the main Library and Contract Builder pages. It also remains an option in the 'Filters' tab.
- Similarly, in the platform, a 'Contract Heading' filter box is now displayed above the search box to help searching when using the 'Insert Content from Library' action. It also remains in the 'Filters' tab.
- When searching for Library Line Item text in the Library or platform, the search box text makes it clearer that the user is searching for text appearing in the body of the Library Line Item, rather than searching for a specific contract heading type. The contract heading type can be specified within the slide-out 'Filters' panel, as usual.

Incorporating the Latest Contract Library Line Item Into a Linked Contract Heading

Contract headings in templates and contracts that are linked to a Library Line Item in the Contract Library keep track of whether the two differ and if so, which has been updated. To facilitate easy comparison and updating between the Library and platform contracts and templates, new functionality makes it simpler to view, compare, and insert Library Line Items from within a template or contract with linked contract headings.

- Existing functionality is that when a contract heading in a contract or template is linked to a Library Line Item, and the Library Line Item has been updated since the last time the heading was aligned with it, the contract heading displays a yellow book icon when looking at the contract in Contract View.
- Now, if the contract heading's contents have also been edited since the last time the two were aligned, the yellow book icon will display a red dot.
- In either case, the 'Insert latest Library version' action is available from the contract heading's drop-down action menu.
- Selecting this action opens a box with a copy of the latest version of the Library Line Item that clearly shows all differences between the contract heading and the Library Line Item. A visual key at the top of the box explains the differences in detail.
- Users can choose to replace the contract heading's text with the latest Library version, add the Library Line Item into the contract directly below the current contract heading to manually composite an updated version, or to cancel the operation.
- Where tagged data fields are present in both versions of the content, as will usually be the case since the items have been aligned, data values are duplicated from the old contract heading into the new text.
- Any tagged data or text edits at risk of being lost are clearly indicated. In these instances, users are recommended to add the Library Line Item as a new contract heading below the current one. This can then be used to compile a fully correct heading, removing the spare once it is complete.

New Broker Permissions can Control the Creation of Contracts and Other Documents

To bring the Platform in line with the security controls required by external, API-based 'headless' systems, broker users now require specific user permissions to create new contracts, declarations, facility agreements, and endorsements. All existing users have been issued these permissions for all teams they are on, to preserve existing functionality.

- The 'Contract Creator – UI' and 'Contract Creator – API' give users permission to create new open market and declaration contracts in the platform and via API calls/external systems respectively.
- Similarly, the 'Facility Creator – UI' and 'Facility Creator – API' permissions allow users to create new facility agreements in the platform and via API, and the 'Endorsement Creator – UI' and 'Endorsement Creator – API' permissions give access to the creation of new endorsements.
- Finally, the 'Contract Correction Creator – UI' and 'Contract Correction Creator – API' permissions allow a broker to begin a new blank correction to a contract, while the 'Edit Contract Corrections' permission lets a user populate, edit, place, and sign a blank contract correction. These three permissions replace the old 'Contract Corrections' permission.
 - Integration implication of these changes is detailed below in the 'Information for Integrators' section.
- Users with access to the Contract Builder via the 'Library Access' or 'Contract Builder' permissions will need to have the appropriate creator permission for their team to create a new contract of that type.
- Brokers with the 'Template Manager' permission are unaffected by the new permission changes, and can still create, edit, and assign templates using both the platform and external headless systems.
- In order to preserve current functionality for all brokers, existing users have these new permissions given automatically for their teams. However, users who did not have the old, superseded 'Contract Corrections' permission for a team have not been given the new replacement contract correction permissions for that team.
- All permission changes are fully tracked in the Admin Portal's history tab.

Draft Contracts Cloned From a Template Clearly Link Back to Their Source Template

To make it easier for brokers to keep track of where draft contracts were sourced from, any draft directly cloned from a template now shows the name of the template at the bottom of the blue drop-down 'Actions' menu when opened in Contract View. Convenient links let the template be opened directly, or shown next to the draft in contract comparison mode.

- When a new draft contract is cloned from a template, a link to that template is preserved.
- The draft's blue drop-down 'Actions' menu in Contract View shows the name of the template, and provides links to open it normally, or to show it as a side-by-side comparison with the draft.

- This information is only shown at the draft contract stage, and only if the draft was directly cloned from a template. If the draft is cloned or duplicated, the new version does not display any template information.
- Similarly, new contracts created by any method other than cloning a template do not display any template information or links.
- The template links show the template as it is at the current time, rather than when the draft was cloned, ensuring that updates to the template are easy to identify.
- Deleted or otherwise inaccessible templates are no longer named or linked in the draft.

Underwriters Must Provide a Reason for Declining a Request to Quote

Earlier versions of the platform provided no systematic, trackable method for underwriters to specify their reasoning when declining a broker's request to quote on a contract. The new, mandatory 'declined reason' field gives underwriters almost twenty different options to select from when declining to quote, permitting brokers to gain better insight into underwriters' needs.

- When declining a request to quote, underwriters must now select a decline reason from a pre-defined list of 19 options.
- The 'Other' option allows underwriters to specify less-common reasons for declining.
- When selecting a reason for declining, underwriters have the opportunity to add concise explanatory notes.
- Brokers will see the selected reason when opening declined quote requests.

New Export Options Provide Greater Flexibility When Saving a Contract to PDF or Word

A number of new options have been added to the export page, including the ability to show the name of the broking organisation that created the document, and adding a 'DRAFT' watermark to contracts exported at the draft stage.

- The name of the broking organisation that created the document may be included in the header of PDF and MS Word exports. It appears on the left side of the header, above the UMR/Unique Reference if that is also included. The broker's logo remains to the right of the header when that is selected for inclusion.
- When exporting a draft contract to file, there is now the option to include a large red 'DRAFT' watermark in the background of each page to ensure that recipients clearly understand that the contract is not yet finalised.
- It is now possible to toggle page numbers off when exporting a document. Previously, page numbers could not be disabled for exports. The default setting is still to include page numbers for exports.
- The date and time that the document was exported may optionally be included in the footer of the PDF or Word document. The text label has been changed to 'Document Generated:' to clearly indicate that the time and date shown is that of the file's export date, rather than the date of the contract's original creation.
- When exporting a PDF document which includes in-line attachments, the attachment's details will use the same justification as the contract heading immediately above them. This ensures that the attachment details are not out of alignment when following centre-justified headings.

Enhancements

- To assist users outside of the London Market, the default term 'UMR' is being replaced with 'Unique Reference' for new contracts.
 - New contracts that specifically require a Lloyd's UMR can still feature a UMR contract heading and data label.
- The Knowledge Base's search system has been improved, and it is now better at recognising a wider variety of search terms, including alternate terms used in the industry that describe Whitespace Platform functionality.
- When an endorsement is created, its effective date is now automatically tagged as the data value of the 'Endorsement Effective Date' tag.
- When using the 'Insert Content from Library' option to bring material into a contract or template, the user can now drag a Library Line Item into any desired location in the platform document.
 - It is now possible to drag a Library Line Item and choose to either replace an existing instance of the contract heading (as previously), or to insert it wherever the user chooses, even if that same contract heading already exists.
- To ensure consistency between the browser and the iOS app, both versions of the Whitespace Platform are more thorough about showing dates in US format when that option is selected.
 - US date formats are correctly displayed across the platform for inception dates, dates shown in the Overview screen, stamp dates, subjectivity dates, endorsement and MTPC 'effective from' dates, exported document created dates, and more.

- When downloading the full list of users from the Admin Portal, new columns clearly show the time and date for each user's first account creation, their most recent account/permissions modification, and the last time they logged into any of their accounts on the Whitespace Platform.
- Broker-created off-platform ILU and LIRMA stamps have been adjusted to display 'XIS' at the top right of the stamp.
- Stamp reference flexibility and consistency has been improved.
 - The stamp reference character limit for newly-created 'Non Bureau' and 'Non Bureau MGA' stamps has been increased to 20 characters, both on and off platform. Pre-existing stamps are still limited to 15-character stamp references.
 - API and platform character limits for stamp references have been brought into alignment.
 - Stamp references for newer stamps in categories not processed via the Bureau now accept some non-alphanumeric characters: hyphen, underscore, forward and backward slashes, full stop, colon, and semi-colon.
 - The following stamp types can accept these characters in stamp references:
 - Lloyd's Consortium, Lloyd's Brussels Consortium, and MGA stamps created after the release of v2.17 of the Whitespace platform
 - Non-Bureau and Non-Bureau MGA stamps created after this release (v3.3).

Information for Integrators

- The API and on-platform character limits for stamp references when creating a new stamp have been brought into alignment. This specifically includes increasing the character limit for new 'Non Bureau' and 'Non Bureau MGA' stamps to 20 characters.
- Additionally, stamp references for all stamps in all categories can now accept some non-alphanumeric characters via API: hyphen, underscore, forward and backward slashes, full stop, colon, and semi-colon.
- The permissions described under the Release Details item "New Broker Permissions to Control the Creation of Contracts and Other Documents" above specify new team-based user permissions. New API accounts will need to be granted these permissions to create contracts, facilities, endorsements, and contract corrections. They will also need a separate permission to progress contract corrections. Existing accounts have been given all these permissions by default to preserve functionality.
 - The `contractCorrection` object in the permissions array of corporate files has been replaced with the three new permission objects `editContractCorrection`, `contractCorrectionCreatorUI` and `contractCorrectionCreatorAPI`.
- One new activity string has been added in this update:
 - "Draft Version Renamed" (Broker Users) – a contract draft has had its name changed.

Upcoming Changes

The option to create a new 'Full Contract', which creates a completely blank contract with a typical selection of contract headings, is being deprecated in a future platform release. Information on how to easily and quickly preserve this functionality if required is included in a tooltip next to the Full Contract option on the 'Create New +' page.

Resolved Issues

Browser

- The API no longer incorrectly permits calls to roll a signed facility agreement with declarations back to the firm order stage.
- An endorsement cannot be withdrawn by API after it has already been agreed by an underwriter.
- When editing or reviewing an endorsement, its effective date is now displayed correctly.
- Users do not receive notifications when a shared template is edited.
- It is no longer possible to use the API to incorrectly open a Mid-Term Participant Change endorsement on a Declaration.

- Brokers are now prevented from incorrectly using the API to insert inline attachments to a firm order at the non-editable shown stage.
- Inline attachments and inline images can again be added to contracts as expected.
- The export window no longer incorrectly offers an option to record the (re)insurer's policy number on the exported contract.
- The screen displaying the differences between a contract heading and the Contract Library Line Item it is aligned with is rendering text properly again.
- Lloyd's Brussels consortium stamps now include the Lloyd's anchor image within the stamp description.
- The Print Preview function now correctly displays serif-font tables split across page boundaries, matching actual exported PDFs.
- Brokers showing a Declaration can now use the 'Open Market' option to record Off-Platform Lines.
- Underwriters can now correctly approve Contract Corrections from an unapproved broker without being blocked by pop-ups.
- Underwriters no longer receive activity messages for contract sections that they are not participating in. Historic activity records remain unaltered.
- It is now possible to update a Mandatory Tag Set containing one tag under a single Contract Heading.
- If an underwriter updates a contract's stamp information to include an unapproved stamp used as a mirror stamp, the broker is now properly unable to accept the change.
- Teams can now be removed from a shared template.
- Brokers can no longer show a Declaration to a facility panel when the declaration line is higher than the facility line.
- The date is displaying correctly and consistently in agreement details after the underwriter approves a Contract Correction.
- It is now possible to revert the insertion of an 'ADDITIONAL INSURED' Library Line Item when inserting Library content into a contract.
- Questionnaire questions are now ordered consistently between the configuration screen and the template in all instances.
- Only brokers with the Template Manager permission may assign a Mandatory Tag Set to a template.
- It is no longer possible to rename a Mandatory Tag Set to a name already in use.
- Only brokers with the 'Edit Contract Corrections' and/or 'Contract Corrections Creator' permissions may assign a Mandatory Tag Set to a Contract Correction.
- Alternate contract heading titles no longer cause Mandatory Tag Sets to fail validation.
- During export, a colon symbol / ':' at the end of a long line will no longer be erroneously wrapped onto the next line by itself.
- When a contract with a Contract Correction has an underwriter has been removed by MTPC, that underwriter may correctly be re-added by another MTPC.
- When a broker satisfies a subjectivity, the date format of the deadline now correctly matches the contract's selected date format.
- The endorsement contract heading 'CONTRACT CHANGES' may be added to the Library. The headings 'ENDORSEMENT EFFECTIVE DATE' and 'ENDORSEMENT AGREEMENTS' can no longer be added.
- When a contract is shown to a facility panel and the open market, the lead underwriter is correctly identified in the underlying data.
- Brokers without Template Manager permission can no longer incorrectly revise template-lock settings when examining a contract in Defined Data View.
- The Admin History now correctly displays newly-added team names without requiring any revision of the table size.
- When exporting a contract to PDF, oversized stamp images are now resized to fit the page, ensuring all stamps are included.
- It is no longer possible to use the API to have lower-case letters in a stamp reference.
- When answering a Questionnaire, brokers can now properly select drop-down answers to consecutive questions without needing to click the next question.
- It is now always possible to select the 'Draft - Indicative' option from the dashboard filter.

- It is no longer possible for brokers to remove the stamp references table when recording or updating off-Platform lines.
- When an underwriter chooses to approve a Contract Correction, the pop up window is no longer hidden when their mouse hovers over the browser URL.
- When an underwriter sends an Indicative request to quote for mandatory Internal Review, duplicate team names no longer appear.
- When self-approving a mandatory Internal Review for a Contract Correction, underwriters may only choose between approving and declining the Correction.
- Validation is now displayed when 100% total participation is exceeded on a Mid-Term Participation Change.
- When showing a firm order to an underwriter for a second time, the members of the team that the contract was first shown to are displayed without having to be selected.
- Underwriters rejecting a broker's attempt to satisfy a subjectivity requirement on a bindable quote now correctly see the message "Subjectivity Response Rejected" instead of being shown an error message.
- After a broker's failure to satisfy a subjectivity requirement leads to an underwriter's line being removed from a firm order, the broker can now re-show the order to the same underwriter.
- When a sectioned Bindable Quote or firm order is shown to the leader of a facility who then adds their line and year of account, the year is now included against the stamp within the WRITTEN LINES contract heading correctly in both browser display and underlying data.
- Defined Data View now correctly highlights mandatory data tags with an asterisk in CDRv3.2 tag mode.
- When adding a DUNS code to a stamp address, the code is validated against DUNS rules.
- If a vertical term is missing a Mandatory Data Tag, the broker is prevented from showing a firm order and informed of the issue.

iOS App

- The date picker is no longer obstructed when selecting an agreement date for an endorsement.
- In line with the browser version of the platform, when a broker using Approved Stamp functionality shows a contract to an underwriter, stamps are considered approved if the Broking organisation is part of a stamp group, but the user is not.
- If an underwriter updates a contract's stamp information to include an unapproved stamp used as a mirror stamp, the broker is now properly unable to accept the change.
- Inactive stamps are no longer incorrectly offered in the list of possible mirror stamps.
- Contracts with invalid characters in the Unique Reference field can no longer be cloned, and Endorsements must have a valid Endorsement Number.
- When Internal Review is mandatory for Contract Corrections, underwriters now correctly see the correct options – either Request Internal Review or Approve/Decline Correction – for each team according to their review permissions for each team.
- Choosing to hide a section heading from an export no longer causes a delay in the app.
- If an underwriter indicates an unapproved stamp on a quoted contract, the broker now correctly sees the 'Unapproved' label for that stamp.
- Adding a risk code to a Lloyd's Consortium stamp no longer crashes the app.
- Underwriters may now include a contract Questionnaire when exporting to Word or PDF.
- The contract version history now correctly displays the completion date of Contract Corrections, ensuring all key dates are visible.
- When a broker accepts a line with a subjectivity requirement, the notification sent to the underwriter includes the date in the same date format as the contract.
- When a master facility agreement has received an MTPC and one of its shared facility instances has had a declaration shown and then withdrawn, then if that same declaration is shown again to the same shared facility, the showing broker can correctly choose to show to either the original panel or the MTPC's panel.
- When Internal Review is mandatory for firm orders, underwriters only see the 'Add Written Line' button for teams which have already approved that order's Internal Review.
- Brokers are now correctly not warned if showing a Bindable Quote with incomplete Mandatory Data Tags.
- Underwriters who do not have 'Self-Approver' permission for a team will no longer see the option to self-approve Internal Reviews for that team.

- When assigning broker teams to a stamp group, the drop-down is no longer partially hidden.
- Manually entering a year outside the date picker's range will no longer crash the app.
- If an endorsement still has an outstanding stamp correction, underwriters will be warned of this before agreeing to the endorsement.
- Adding the PARTICIPANT CHANGES contract heading to a contract as a broker no longer incorrectly displays buttons to add, amend, and remove underwriters.
- After a broker's failure to satisfy a subjectivity requirement leads to an underwriter's line being removed from a firm order, the broker can now re-show the order to the same underwriter.
- When a broker clones a template with a Questionnaire as a new contract, they can now update the answers in the contract without errors.
- The Sign Lines button is no longer displayed if any vertical term has not been assigned to one or more underwriters.
- When editing or reviewing an endorsement, its effective date is now displayed correctly.

Production Installation and Access Guide

iOS App

iOS users need to upgrade their Whitespace Platform iOS app to the latest version, which is available on the Apple App store. If you experience any difficulty signing in after the upgrade, it may be necessary to delete and reinstall the iOS app.

Please note that we are no longer able to include support for iOS v16. The Whitespace App requires iOS v17 to run.

Browser

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