

Whitespace Platform v2.11.0

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Date: 6th April 2023

Headlines

'Merge Data with Template' lets brokers extract defined data from a light contract and merge it into a detailed template to quickly create a full contract.

The new indicative quoting system allows brokers and underwriters to indicate interest without obligation.

Brokers now have a per-contract chat channel that is visible to members of their team.

Release Details

New Features

- Merging Data From a Source Contract into a Template
 - Brokers can now directly transfer the defined data from a lightweight, indicative, or otherwise non-final **source** contract into a prepared **destination** contract template.
 - The '**Merge Data to Template**' action is available when the source contract is at the draft, draft bindable quote, and draft firm order contract stages.
 - The new combined contract overwrites the source document.
 - This process makes it easy to share and agree key contract points without burying them in detail or requiring later rekeying. It also makes the creation of new contracts from template faster and more reliable.
 - The defined data fields in the source and template contracts must match to ensure no data is lost. Only defined data is retrieved from the source contract.
- Expressing Interest with Indicative Quoting
 - Select the '**Mark as Indicative**' box at the top of a draft contract (brokers), or quote being prepared (underwriters) to label the contract as strictly non-binding.
 - This functionality allows users to express interest or offer terms without any obligation or encumbrance.
 - An indicative quote becomes a binding request as usual when subsequently shown as a firm order or bindable quote.
 - Indicative quoted contracts and quote requests are displayed in their own delimited contract instance sections on the contract overview screen.
- Using Internal Chat to Discuss Contract-Specific Matters
 - Brokers now have two tabs within their 'Chats' pane, 'Internal' and 'External'.
 - External Chat is the regular chat functionality, unchanged.
 - Internal Chat is only accessible to members of the same broking team – that is, the broking organisation's users who can access the contract. It is never shared with underwriters.
 - The 'Chats' pane is accessible from the contract overview and document text view screens.

Enhancements

- Duplicating a bindable quote under the same contract record permits the broker to easily offer alternate terms within the bindable quote functionality without increasing workload.
 - Only one bindable quote per contract can be advanced to firm order.
- The iOS app now includes full bindable quote functionality in line with the browser version of the platform.
- Internal reviewers can now be given permission to approve their own contract reviews.
 - Note that this permission can currently only be set by the Whitespace support team.
 - Email support@whitespace.co.uk with the details of the user/s to be given self-approval status.
- Indentation is now preserved when pasting text from Microsoft Word into the platform.

- The platform now supports pasting text with tabbed indents of up to eight levels, with or without bullet points. Levels of indenting greater than eight are reduced to that limit.
- When first pasting bulleted text, an extra tab may be shown in the editing box. This is removed when the contract heading is saved.
- Multiple space characters in the text are replaced with a single space for consistency.
- The MI Report has been extended to reflect added functionality.
 - 'Bindable Quote Ref' identifies the sequential number assigned to multiple bindable quotes created under a single contract. Each bindable quote instance has a separate row per underwriter and, if applicable, per shown contract section in the report table, and the 'Status' column shows that row's latest status.
 - 'Indicative Quote Request Date' and 'Indicative Quote Response Date' columns identify current or previous non-binding contracts.
 - 'Excess' and 'Excess/Attachment Point' columns display excess-related data when the appropriate defined data tags have been applied.
- The 'Upload New Draft' option has been removed from contract overview pages in line with the digitiser's switch to template creation. Drafts can always be cloned within the contract record and then revised as needed.
- Additional headings related to the structured creation of renewals previously only in endorsements are now available for contracts: 'Contract Administration and Advisory', 'Contract Endorsement', and 'Contract Changes'.
- When exporting a contract which has multiple sections defined, the written lines for each section will start on a new page.

Known Issues

- On the iOS app, an underwriter de/selecting the 'Mark as Indicative' button when preparing a quote **must** click 'Done' immediately after de/selecting the button and then re-open the quote again for the indicative status to be correct when the quote is sent.

Resolved Issues

- Blue alert notification badges are now being cleared properly.
- Underwriters have proper post-signing control of lines they've written that have unsatisfied subjectivity requirements.
- Usability and export of Mid-Term Participant Change endorsements has been improved.
- Exporting contracts as Word documents no longer occasionally causes errors.
- Draft bindable quotes now show edits correctly.
- Tagged UMR records can now be correctly searched and filtered from the dashboard.
- The behaviour of the line guidance box has been improved.
- Underwriters can no longer remove inline images from a contract.
- Specific complex bindable quote conditions are now correctly displayed in the MI Report.
- Inadvertent blank spaces no longer sometimes appear in front of defined data tags.
- Display of the 'Manage Lines' button has been improved.
- The underwriter selection window no longer sometimes displays incorrectly.
- Creating a bindable quote cannot now bypass mandatory internal review requirements.
- Editing endorsement contract headings does not occasionally cause errors.
- The 'Add Written Lines' button displays correctly for underwriters again.

Production Installation and Access Guide

iOS App

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

Browser

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