Whitespace Platform Release Notes v2.13.0

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Headlines

The new 'Edit All' button allows an entire contract to be edited on a click-n-type basis without interruptions. Brokers can share contracts with other brokers to assist in the placing process via the Whitespace Platform. Bindable quotes can be marked as not taken up as needed.

Release Details

New Features

- Whole-Contract Editing Using the 'Edit All' Button
  - Contracts at editable stages – template, draft contract, draft bindable quote, draft firm order, and unshown endorsement – show a new 'Edit All' button.
  - Click on any contract heading or its text to focus that heading's text for immediate editing, moving freely from heading to heading as needed.
  - Contract headings and their text can be deleted, and new contract headings added.
  - All existing unlocked text and defined data can be edited.
  - Rich text formats are available, and bullet points, lists, and tables can be pasted without any loss of formatting.
  - When editing is complete, the changes can either be confirmed or declined.
  - Structural changes to the contract, such as verticalising a contract heading or editing its name must still be done outside of the 'Edit All' functionality.

- Connecting Brokers With the 'Broking Partners' System
  - Brokers can work together to ensure the full placement of risks.
  - Enabling the 'Broking Partners' system in the admin portal allows an originating ('producing') broker to share a contract with whitelisted ('placing') brokers as a new editable draft.
  - This new draft contract can then be taken through the full placing process as usual by the placing broker.
  - The placing broker can transfer any instances of the contract back to the producing broker to authorise via chat.

Enhancements

- Marking Bindable Quote Instances as Not Taken Up
  - When selecting a bindable quote to advance to firm order, other bindable quote instances on the same contract with at least one written line can be automatically marked as 'Not Taken Up'.
  - Similarly, bindable quotes with at least one written line can be manually marked as 'Not Taken Up' from the 'Actions' menu.
- Editing the Text Under Individual Contract Headings is More Secure
  - When editing an individual contract heading and its text, it is no longer possible to accidentally cancel the edits.
  - Cancelling unsaved changes now opens a warning that lets you confirm the discard, resume editing, or save the changes.
- Simplified Notification Emails
  - Email notifications have been standardised around a simple template that is easily comprehensible by both users and systems.
  - Where the notification is alerting users to a new chat or broker message, that message is included with the notification in full.

Resolved Issues

- Various issues have been fixed in the admin module
- Bindable quote functionality has been improved
- Contract and contract section leadership is clearer
- Some display instabilities in the MI Report have been fixed
- The correct inception date is now always being retrieved for display in the dashboard
- Brokers on multiple teams can select a specific team for a new contract and are warned about inactive teams
- Button stamps display more reliably
- New team members can create contracts as intended
- Mandatory internal review handles off-platform underwriters correctly
- ReadOnly users can now view tagged data, and are not shown certain controls
- PowerPoint documents have an identifying logo in the attachments tab
- Brokers will be more reliably warned about disparities with the intended total when signing lines
- Chat makes it easier to differentiate separate teams from the same organisation
- Cloned endorsements track more clearly in history
- Updating underwriter references doesn't cause any display issues
- The system more reliably remembers notification values and selected underwriters
- Market-only advisement contracts identify team owner more clearly
- Subjectivity deadline updates are less restrictive
- It is no longer possible for underwriters to crash their browser when repeatedly adding a bindable line
- Firm orders now display validated stamps when shown to new underwriters
- It's no longer possible to cause issues by adding a space before or after the UMR
- Precise details of broker lock types are not visible to underwriters on new contract headings
- Some inconsistencies on tagged data and internal review between iOS and browser have been resolved.
- Endorsements handle bullet points correctly
- Occasional issues preventing brokers from updating a signed line have been removed

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.