

Whitespace Platform

Release Notes v3.5.0

Author: Tim Dedopulos
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Release Headlines

- Programme and Layer functionality
- Ability to bind risks without London-style stamps
- Improvements to non-Bureau stamp detail in the Admin Portal
- Standardisation of DUNS code fields in the Admin Portal

For Broker Users

Programmes

Programme contracts give brokers the ability to show centralised programme information, link multiple contracts as layers, centrally manage attachments, quickly see and navigate to layers, place layers in bulk, and more. They provide a powerful structured option for working with complex placements.

- The new 'Programme' contract type provides a powerful central point to manage the placement of large exposures.
- From the programme overview's 'Layers' tab, brokers can
 - link new layers,
 - see core details of linked layers,
 - switch to an individual layer, and
 - select multiple layers in bulk to show for quote, show as Bindable Quote, or show as Firm Order.
- Programme contracts can be shown to underwriters to establish interest in layer participation, and can include as many or as few contract headings as required. They cannot be advanced past the quoted stage, and as such are strictly non-binding.
- Previously unlinked open market, declaration, and off-platform contracts at the draft stage can be linked to a programme as a new layer. This operation is permanent, and cannot be undone.
- Layers behave as stand-alone contracts for all editing, placing, finalising, and endorsing purposes, and also enable powerful programme functions.
- Layers remain independent of each other's statuses. Brokers are able to attach and show new layers even if all existing layers of the programme have been signed.
- Both brokers and underwriters can readily switch between programmes and the layers they have visibility of. Layers prominently identify the programme they are linked with on their Contract Overview page.
- Attachments are centralised under programmes, from where they can be fully tracked and shown to any or all participants on any of the linked layers as required.
- Participants only have access to attachments that have been shared with them by the broker.
- Underwriters cannot see layers that they have not been shown.
- Programmes and layers are fully tracked in both the history system and via MI Reports, and do not require any new user permissions.
- Programmes do not auto-expire on the date specified in their Expiry tag, and it is always possible to toggle them between 'Expired' or 'Active' from the 'Programme Settings' page. New layers cannot be linked to an expired programme.

Binding contracts without London-style stamps

For underwriters operating outside the London Market, it is now possible to use a policy number to indicate that they are binding the contract. This permits underwriters in non-London locations to agree contracts without needing London style stamp agreements

- When binding a contract with a policy number, underwriters can enter an alphanumeric policy number of up to twenty characters, and they may also record subjectivity requirements.
- When exporting a contract, policy numbers can be included in the exported document's header.
- Brokers cannot use 'Policy Number Only' templates to record off-platform lines.

Increasing stamp reference options for non-Bureau stamps

Underwriter admins can create new non-Bureau stamps with 'Code' fields of up to 36 alphanumeric characters to support a greater variety of authorities.

- The 'Code' field of non-Bureau stamps can consist of up to 36 alphanumeric characters, including the special characters '-' (hyphen) and '_' (underscore).
- The changes provide support for not only DUNS, but also GUID, NAICS, ABN, and other registration codes.

For Underwriter Users

Programmes

Programme contracts give brokers the ability to show centralised programme information, link multiple contracts as layers, centrally manage attachments, quickly see and navigate to layers, place layers in bulk, and more. They provide a powerful structured option for working with complex placements.

- The new 'Programme' contract type provides a powerful central point to manage the placement of large exposures.
- Programme contracts can be shown to underwriters to establish interest in layer participation, and can include as many or as few contract headings as required. They cannot be advanced past the quoted stage, and as such are strictly non-binding.
- Layers behave as stand-alone contracts for all editing, placing, finalising, and endorsing purposes, and also enable powerful programme functions.
- Layers remain independent of each other's statuses. Brokers are able to attach and show new layers even if all existing layers of the programme have been signed.
- Both brokers and underwriters can readily switch between programmes and the layers they have visibility of. Layers prominently identify the programme they are linked with on their Contract Overview page.
- Underwriters process layers as they do with existing contracts. The layer's association with its programme is always clearly indicated, and if you have been shown the programme contract, you can switch between the two easily. Underwriters cannot see layers that they have not been shown.
- Attachments are centralised under programmes, from where they can be fully tracked and shown to any or all participants on any of the linked layers as required.
- Participants only have access to attachments that have been shared with them by the broker.
- Programmes and layers are fully tracked in both the history system and via MI Reports, and do not require any new user permissions.

Binding contracts without London-style stamps

For underwriters outside the London Market, it is now possible to use a policy number to indicate that they are binding the contract. This allows underwriters in global locations to agree contracts without needing London-style stamp agreements.

- Underwriter admins can configure 'Policy Number Only' templates via the 'Stamps' tab that allow underwriters to place down a policy number instead of a stamp.
- These templates have registered addresses configured with them so specific legal entities can be associated with the template.
- When binding a contract with a policy number, underwriters can enter an alphanumeric policy number of up to twenty characters, and they may also record subjectivity requirements.
- When exporting a contract, policy numbers can be included in the exported document's header.

Increasing stamp reference options for non-Bureau stamps

To support a greater variety of non-Bureau authority codes and standardise existing code requirements, non-bureau stamp code fields have been made more flexible.

- When creating Non-Bureau stamps, validation of the 'Code' field has been extended to permit codes of up to 36 alphanumeric characters.
- This field can also accept the special characters '-' (hyphen) and '_' (underscore).
- The changes provide support for not only DUNS, but also GUID, NAICS, ABN, and other registration codes.

Platform Enhancements

- D-U-N-S code fields in the Admin portal have been standardised to the regular 9-digit code in line with typical industry expectations, removing the 'DUNS+4' option, which had the potential to damage downstream processing.
 - This change applies to the DUNS field in stamp addresses and the 'Dun & Bradstreet (D-U-N-S Code)' drop-down field in the 'Authority' section of the Organisation Details page.
 - As noted above, the Code field for Non-Bureau stamps is no longer restricted to DUNS-format entries.
- When a user downloads a new or revised attachment, its associated 'Action' notification in the Platform is automatically dismissed, reducing clutter.
- Stamp block formatting has been enhanced to make it clearer that line conditions and subjectivity requirements are associated with the written line itself, rather than with any particular primary stamp, split stamp, or mirror stamp.
 - A thin divider now appears after each line's details, showing that conditions, subjectivities and addresses are associated with that line as a whole.
 - For consistency's sake, the divider is present both on the screen and in exported contracts, and is shown whether the line is accompanied by a simple stamp on its own or a complex split stamp with multiple conditions, subjectivities, and addresses.
- When exporting contracts, new options give users full control over whether to include no stamp addresses, registered business addresses, invoice addresses, or both addresses with (re)insurer's stamps.

Integration Changes

- The API's `/createSubjectivityResponse` call is now available for integrator use. This permits broker integrators to try to satisfy subjectivities added by underwriters on their lines.
- When exporting contracts via API, integrators will need to adjust their payloads to take account of the new options for specifying which stamp addresses are to be included if stamp addresses are shown in the export.
- The 'Code' field of Non-Bureau stamps is no longer restricted to DUNS+4 validation, and will instead accept code values of up to 36 alphanumeric characters, also including the special characters '-' (hyphen) and '_' (underscore).
- The Activity document for a declined 'Request to Quote' or 'Contract Correction' now includes a key-value pair specifying the reason given for the declination, including details of the 'Other' response and any provided 'Notes'. It also lists the declining underwriter, their team, the organisation's name, and the date and time.
- Five new activity strings have been added in this update to support the new Programmes functionality:
 - **"Linked To Programme"** (Broker) – A programme has had a new layer linked to it.
 - **"Layer Linked"** (Broker) – A contract has been linked to a programme as a new layer.
 - **"Layer(s) shown for Quote from Programme"** (Broker) – A layer has been shown for quote from its programme's 'Layers' tab.
 - **"Layer(s) shown as Bindable Quote from Programme"** (Broker) – A layer has been shown as a Bindable Quote from its programme's 'Layers' tab.
 - **"Layer(s) shown as Firm Order from Programme"** (Broker) – A layer has been shown as a firm order from its programme's 'Layers' tab.
- See also the 'API' section in the Resolved Issues list below.

Resolved Issues

Browser

- The Written Lines contract heading was being exported twice in cases where an underwriter's line included a subjectivity response. This issue has been resolved.
- When a declaration was shown to an off-platform facility leader, there was a discrepancy between the declaration line and the auto-generated written line value on the 'Record Off-Platform Lines' screen. This has been corrected.
- A rare scenario that led to certain users either being unable to login or having their session terminated has been fixed.
- Brokers with access to a shared facility no longer incorrectly receive email notifications about its attachments.
- During export, custom mirror stamps and their stamp descriptions are now correctly placed on the same page.
- If an underwriter submits an Internal Review at the Bindable Quote stage, they now receive a notification to inform them of the outcome of the review.
- ILU stamps can no longer have their stamp information updated with invalid characters.
- All broker admins can now successfully export their list of Approved Stamps.
- Brokers are now correctly warned when attempting to enter an invalid non-Bureau stamp for an off-platform line.
- The export screen option to exclude stamp address information is no longer being shown for draft firm order exports, because there are no stamps on contracts at that stage.
- Users can no longer incorrectly enter more than 12 characters for Lloyd's Brussels and Lloyd's Consortium mirror stamps references.
- Users no longer need the 'Edit Contract Corrections' permission to request an Internal Review for a contract correction in progress.
- When a Bindable Quote is shown to an underwriter but progresses to firm order before the underwriter responds, the "Bindable quote received" action is now automatically cleared.
- Risk codes can no longer be incorrectly entered when a broker creates a new off-platform non-Bureau stamp and uses it to record a line.
- The option to export a facility contract with a Defined Data supplementary document has been removed, as this document is not relevant to facilities.
- When exporting vertical terms separately, the terms are now correctly being exported on different pages.
- Underwriters are now able to correctly request a Internal Review on an endorsement with a sequence number greater than 9 when endorsements are subject to mandatory Internal Review.
- Brokers can no longer incorrectly accept an underwriter's written line if there was a subjectivity requirement that was satisfied at the Bindable Quote stage but which has since been updated by the underwriter.
- Custom mirror stamps can no longer be updated to have blank stamp information.

API

- API users can no longer incorrectly propose or bind lines for (non-)notify parties that exceed their written line percentage on the original facility contract.
- API users can no longer incorrectly progress a Bindable Quote with outstanding line conditions to the firm order stage.
- API users without the 'Edit Contract Corrections' permission can no longer incorrectly edit an in-progress contract correction using Multi Edit.

Production Installation and Access Guide

Browser

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

iOS App

The iOS app has been temporarily withdrawn whilst we redesign it. Watch for news of its exciting relaunch.