Vitesse Release Notes for FCP Account Application Forms

This note covers the enhancement release for Vitesse.

Release date: 29th May 2025

Summary of Change

This change outlines the approach to removing the manual process for MA’s by replacing the Excel forms with an online MAS form.

This change order will:

* Improve the FCP Account Creation process by moving the Excel form to an online form. All other processes will remain the same.
* Remove the need for Excel input, manual email distribution and the involvement of Vitesse implementation team.
* Ensure data is complete and accurate and validated against stored lists provided by LIMOSS and Lloyd’s.

Details of Change

* Account creation forms (Payment and Funding) are online forms, held within MAS
* Wherever possible, fields should be completed by drop down rather than free format to ensure complete and accurate information and validated against stored lists wherever possible. The API connections to the Lloyd’s API library endpoints and LIMOSS data API endpoints should allow the following fields to be validated against stored data:
  + DCA PIN, Name and Address
  + Broker code, Name and Address
  + Syndicate Number and Syndicate/Managing Agent Name (all sections)
  + Class of Business
  + CAT code
  + Risk Code
* All other fields are to be entered by the Lead MA, and do not come from the API
* It is possible to part complete a form, save it and return to it later
* A new create user role exists in MAS, such that, only users that have been assigned the FCP Create Account Application role can complete the application form
* A new approve user role exists in MAS, such that, only users that have been assigned the FCP Approve Account Application role can approve the application form
* Approval is completed in MAS by authourised persons where there is a MAS user for the merchant with the relevant approver user role
* Approval can be completed manually out of MAS, where there is no MAS user for the merchant with the relevant approval user role
  + Approver details should be captured in MAS
* Once approved, an email is sent to the user that submitted the form and the user that approved the form (for both MAS and out of MAS approval)
* The user can export the completed form in csv format
* User can duplicate other forms in any state, to create a new application form for a new account request
* Each application has a unique reference number
* Where applicable, fields on the form include tooltips to provide additional information to the user
* User cannot submit the application form until all mandatory fields are completed and correctly validated by the system
* All fields will be validated according to the field type to ensure data is accurate e.g. Email address, telephone number, date, year etc.

If you need any more information on this change, please contact:

* [servicedesk@Limoss.London](mailto:servicedesk@Limoss.London)
* [FCPSupport@vitessepsp.com](mailto:FCPsupport@vitessepsp.com)