Release Notes for FR1 - Recommendations upload

Release type	Release date	No of Features
Enhancement	**5/11/2026**	**4**

Release goal

Enable auditors to attach recommendations to specific UMRs and bulk upload them, reducing manual and duplicate data entry so findings and recommendations are recorded in less time.

Items included

ID	Change	Change description and benefit
DAM-058	Introduce upload functionality for recommendations	You can now upload recommendations using an Excel file, making data entry faster and easier. The system checks your file instantly and shows which records are valid or need fixing, with clear error messages for any issues. You must correct all errors before saving. Once saved, your new records appear on the main screen. Please note: uploading the same file again will create duplicates, and you must re-upload the whole file if you need to fix errors. Duplicate detection is not included.
DAM-048	Enable re-routing to Coverholder	Users can now reassign recommendations that were incorrectly sent to the “Carrier” instead of the “Coverholder.” This allows you to quickly correct routing errors and ensure recommendations reach the right party. All changes are saved, shown on relevant screens and reports, and require a comment explaining the reason for the reassignment, supporting audit and traceability needs.
DAM-036	Upload recommendations to multiple UMRs at once	You can now upload a recommendation to multiple UMRs at once by selecting the relevant UMRs when raising a recommendation. This removes the need to enter the same recommendation separately for each UMR, saving time and reducing duplicate entries.
DAM-040	UMR Specific Reporting	The reporting section now allows auditors to record findings and recommendations for each UMR (Unique Market Reference) separately when there are multiple UMRs for the same Managing Agent. Sections 7–11 are now available in both Coverholder and UMR-specific reports, using a consistent structure. This ensures more accurate and detailed reporting, making it easier to track and manage issues by UMR. This update applies only to the Coverholder workflow and does not affect other processes.