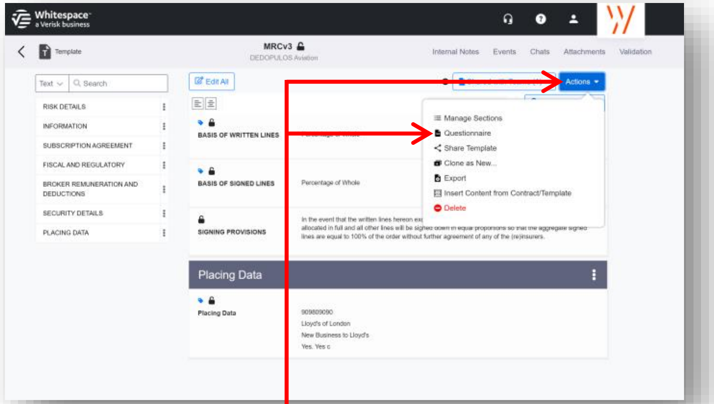
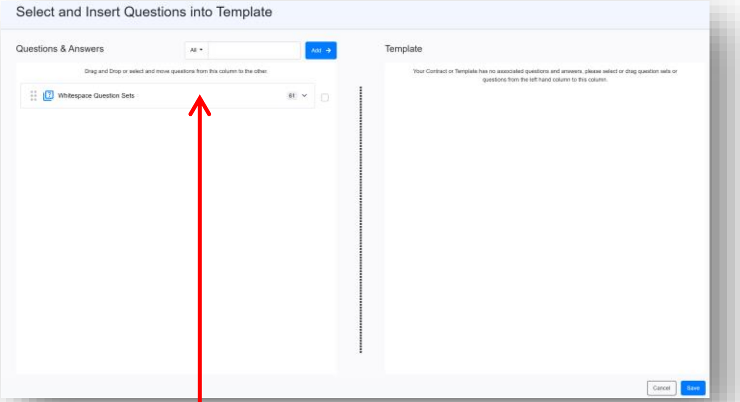
# Adding a Questionnaire to a Template

1.



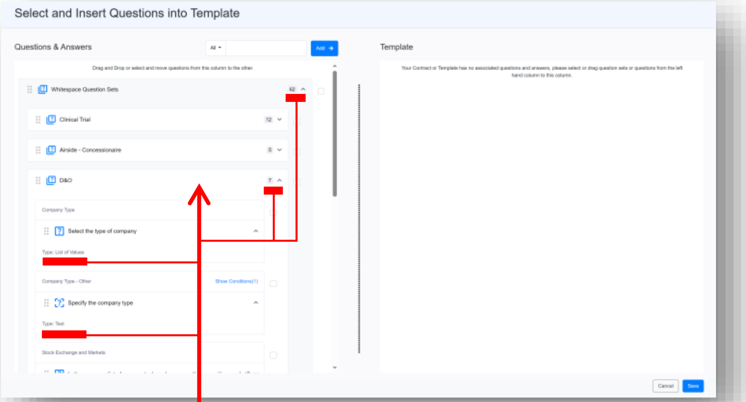
Template Managers can add questionnaires to templates. These let brokers share pertinent, structured supplementary information that might not be included within the contract itself. To add a questionnaire to a template, open it in contract view and click 'Questionnaire' from the blue drop-down 'Actions' menu.

2.



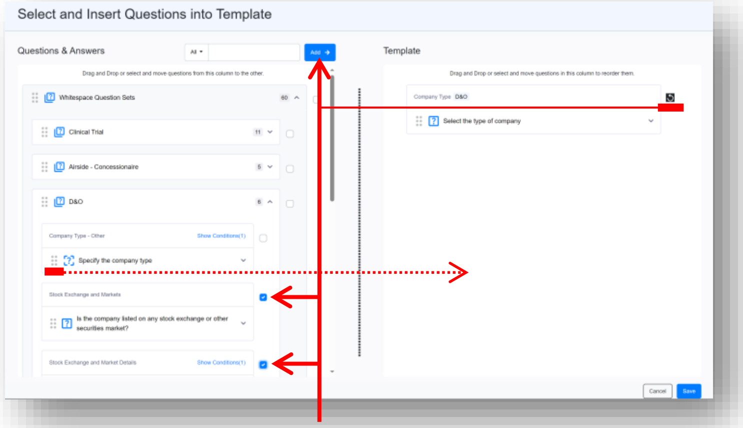

Questions are grouped in Question Sets. All users have access to Whitespace's pre-configured Group of Question Sets, and organisations can also contact support to add bespoke Question Sets for their users. To expand a Group, Set or individual question, click on the entry in the list.

3.



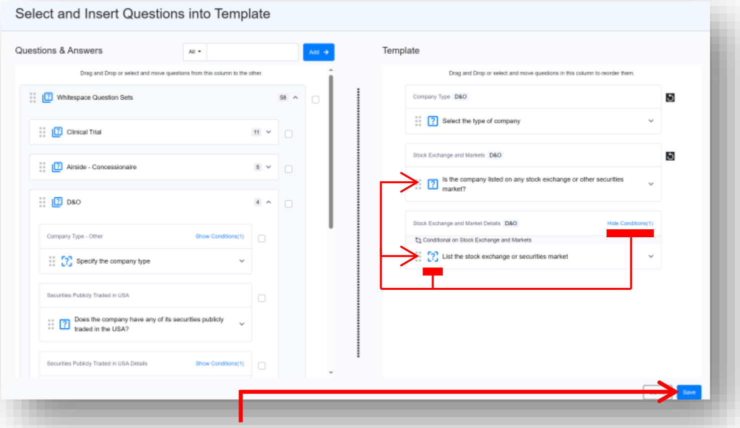

Questions are arranged in Sets according to the class of business they typically apply to. The number at the end of entry in the list shows how many questions it holds. Click a Set in the list to expand it, and click a question to see the type of answer category that it provides.

4.



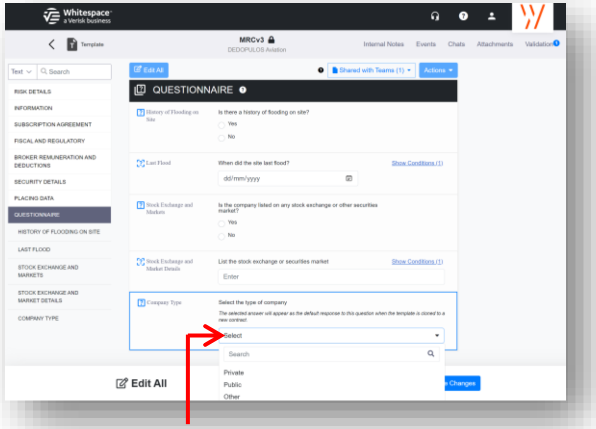

You can click the six-dot icon at the left of a question (or Set) and drag it to the 'Template' side to add it to the questionnaire, and also to move it up or down within the questionnaire. You can also tick the check-boxes of one or more entries and click the blue 'Add ->' button to add them. Click the 'undo' icon to remove them.

5.




Some questions, with a dashed icon outline and a 'Show Conditions(x)' toggle, can only be added to a questionnaire if their parent question/s are also added. They show in the template but only appear in the contract if specific answers are selected. When you are happy with the questionnaire, click 'Save'.

6.




Questionnaires are always automatically included when the template is cloned.

It is possible to manage which underwriters can see them via the Admin portal.

Questions cannot be edited, but you can set default answers by editing the questionnaire once it is part of the template. There are several types of answers, including selecting an item from a list, entering a date, and typing into a text field. Brokers should complete contract questionnaires before showing, and can always override the template's default answers.