Copying Templates and Contracts to Other Teams with JSON Export/Upload



Select 'Export' from the blue drop-down 'Actions' menu.

Digitise from Word or PDF	
Select this option if you already have a contract document in Word or PDF format that you wish to upload into Whitespace , either as a template for future use or as a one-off contract.	
Full Contract	
Select this option if you want to create a contract from scratch. Headings will be present by default. Contract text must be entered.	
Off-Platform Contract	
Select this option if you have a contract or a facility agreement that has been signed outside of Whitespace but which requires an endorsement to be processed within Whitespace, or which requires a declaration to be placed under it.	
Outline Contract	
Select this option if you want to place the risk in Whitespace by entering a limited amount of identifying data and attaching the full contract as a PDF.	
Use Template	
Select this option if you want to create a contract from a pre-existing template.	

To upload a JSON archive to the platform, click 'Create New +' at the top of the dashboard, select 'Upload JSON as a new Contract/Template', and click 'Proceed'.

PDF / Word		JSON	
Sections: Remo	we page breaks	: Settings:	
Risk Details	2	Add company logo?	
Information		Custom top margin?	points
Subscription Agreement	2	Include UMR in Header?	
Fiscal And Regulatory	2	Blank pages after stamps?	1
Broker Remuneration And Deductions		Include Internal Review Details	
 Security Details 	2	 Include Attachments (PDF only) 	
File Format:		Defined Data Supplementary Docu	ment
O PDF		Alignment:	
O Word		 Align with top of Heading 	
Font Style:	 Align with bottom of Heading 		
O Sans-serif			
 Serif 			

In the 'Export' dialog box, click the new 'JSON' tab towards the top of the box.

Please select document(s) to upload.	
	TEMPLATE
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Click 'Choose File(s)' and select one or more JSON archive files. Drafts to upload show in the 'Draft' column and templates in the 'Template' column. Select one or more of your user teams to add the uploaded contract/s to and click 'Upload'.

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By default, attachments are included in the archive. To exclude them, select 'No'. Click 'Export' to save the archive.



The new uploaded contract is identical to the exported version, preserving all content, formatting, tags, status, locking, and more. JSON archives can be used across all Whitespace environments and are fully forwards-compatible with future versions of the platform.



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