<u>Using the Contract Library to Create Line Items (p1)</u>

Create New •	Build •
Line Item	Contract/Template using Library
C Line Item(s) from Contract/Template	-
Layout Guide from Contract/Template	
Line Item or Layout from JSCN file drop file/click here to choose file	

In the Library, click 'Create New +'. For a single Line Item, click 'Line Item' – see image #2 – or to import one or more Line Items from the Platform, click 'Line Item(s) from Contract/ Template' – see image #6.

 Select Option 		Add Information	 Create 		_
REATE NEW LIN	e item: • 🔒			Acti	ons ≡
NFORMATION	• <i>L</i>	CONTRACT HEADING	≡ ≡ ⊚	PREMIUM	- 8
Core Info	Usage	Premium		1 2 +	
				0	×
Title MA Descents Descrive	TRIA			All Tags	<u>^</u>
Excluded Reference	, mo	277 (100%) in full per annum / (72) for the Policy Period		Premium Adjustable Indicator @	TAN)
NA-PROx-Premium-	3SV	25% Minimum Earned Premium		Premium Amount @	~
Version		3 To insert a table, copy and paste the source table into the desired position within the lest box above. Please note that un sually wide	tables may not export	***	_ 1.00
I Section Heading RiskDatails		- necty.		Premium Amount Less Discounts Applicable At Inception @	TAH)
Contract Heading Premium				Premium Application Basis	+AH)
Tag Category Premium				Premium Contractual Currency @	+ Add
Class of Business					+ 440
Property (D&F) Sub Class				Premium Period Qualifier in full per annum	~
Property Dar (05 bi Jurisdiction	ider)			Premium Rate Basis 🛛	+ Add
Pennsylvania				Premium Rate % 🛛	+ 444
Language				Premium Type 😡	+ Add)
English				Adjustment Basis	+ 444

In the text editor you can type or paste into the edit box, or import ("Digitise") a document. Add data as in the Platform. Save as a draft to edit later, or active to set live.

 Select Option 		 Add Informatic 	n	ା ତ	reate	
		CREATE	NEW LINE ITEM .			
CORE INFORMATION						
Title" 0		Reference* 0	Line Item Type* 0		Valid From Date*	
NA Property Premium, TRIA Excl	uded	NA-PROx-Premit -GSV	Standard Heading	~	01 Mar 2025	#
Section Heading*		Contract Heading*	Tag Category*			
Risk Details	~	Premium	Premium	~		
CORE INFORMATION (OP Class of Business	TIONAL)	Sub-class	Insurance Type		Jurisdiction	
Property (D&P) X	×	Property Datr (US bender) X	V Insumree X	~	Pennsylvania ×	~
Clause Type		Language	_			
	~	English X	*			
USED IN (OPTIONAL)						
Teams Restrict t	to Team	Group Names 0	Shared Companies 0			
Property X	~	Extensive X MRCv3 X GSV Contract	Stortford Broking PROD	~		
						4

Creating a new single Line Item takes you to a detailed metadata entry page. Fill it in carefully. Title, Reference, and Group Names are particularly vital. Click 'Proceed' when done to enter Line Item view.



Clicking the 'Digitise' button opens an upload pane. Use it to select/drop a Word or PDF document containing the text of the Line Item, and click 'Digitise'. The document text inserts into the Line Item's text field, overwriting any existing content.

Select Option	• Add	Information	(i) Create		
	с	REATE NEW LINE ITEM .			
CORE INFORMATION					
Title" 0	Reference* O	Line Item Type* O		Valid From Date*	
		Standard Heading	~		
Section Heading*	Contract Heading*	Clause - Not Clause Manager			
~		Wording			
		Standard Heading			
CORE INFORMATION (OPTIONAL)					
Class of Business	Sub-class	Insurance Type		Jurisdiction	
×		· ·	*		~
Clause Type	Language				
×		~			
USED IN (OPTIONAL)					
Tearra O	Group Names	Shared Companies			
· · · · · · · · · · · · · · · · · · ·		✓ Stortford Broking PROD ▲	~		

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Please note that Line Items of the 'Clause' type can only be created if you have a the 'Clause Management' permission set to 'Ability to Create / Edit Clause' in the Admin portal.

← ③ Select Option	 Select Contract/Template 	۲	Select Line Item(s)	 Add In 	nformation	 Create
	SI	EARCH FOR C	ONTRACT/TEMPL	ATE O		
	Placement Type	Risk Name		Unique ID		
	Contract Type	UMR		Status		
	Declarations ×	×			~	
		~			Search	
Risk Name	Status	Contract Type	UMR	Team	Owner	Inception Da
Diorite	•	Declaration	B2317W8T380529115	Al Risks	Cayoe Hubbard	06 Feb 2024
Anthracite	Firm Order	Declaration	B2317WST380529120	Al Risks	Cayce Hubbard	06 Feb 2024
Mangoes	Firm Order	Declaration	B2317WST380529133	All Risks	Cayce Hubbard	10 Nov 2023
British Airways (BA) Plo.	Firm Order	Declaration	B2317WST38052910F	Al Risks	Cayoe Hubbard	01 Aug 2023
Encom for BA	🔮 Firm Order	Doctaration	B2317WST380529104	All Risks	Cayce Hubbard	01 Aug 2023

Creating new Line Items from a contract/template gives you a list of all the existing contracts and templates you can see on the Platform. Enter search info and click 'Search'. Find the contract record to import Line Items from, and click on it.



Using the Contract Library to Create Line Items (p2)

divenced occuron			
INFORMATION	Risk Details	Underwriters	Created / Shared Date
Risk Name Diorite	Firm Order	Wantage Underwriting	06 February 2024 13:51
Status Firm Order	Firm Order	Messina Insurance Company	23 October 2024 17:25
Type Declaration	Firm Order	Palermo Insurance Incorporated	23 October 2024 17:25
UMR B2317WST380529115	Firm Order	Wantage Underwriting	20 March 2024 12:44
Team All Risks	() Druft		05 February 2024 13:38
Owner Cayce Hubbard			
06 Feb 2024			

All the specific contract instances held under that contract record are listed for you to select from. Click on the appropriate contract instance and then click proceed.

	Select Contract/Template	🙂 Se	ect Line Item(s)	Add Information	Create	
	Al	DD SUPPORTIN	G INFORMATION O			
You are about to add 45 new Li	ne Items to the Library.					
() Where applicable, values are in	herited from the source Contract/Template fo	r each Line Item selected	Where multiple line items are being a	added no value will be display	ved.	
CORE INFORMATION						
Reference*	Valid From Date*					
Hull-Template-25	28 Feb 2025					
Class of Business	Sub-class	~	Insurance Type	-k	urisdiction EEA ×	~
Language						
English X	×					
USED IN (OPTIONAL)						
Teams Restrict to T	eam Group Names		Shared Companies			
Marine ×	Astalled Template Contract X	*	Stortland Broking PROD	*		

When importing from the a Platform, some data is taken from the contract/template. Fill in other fields, taking care with 'Reference' and 'Group Names', and click 'Proceed'.



Please note that importing a template into the Library links all of its imported contract headings with their respective Library Line Items, as shown by the 'Book' icon by the heading title. This makes it easier to keep up to date. To avoid this, clone the template to a new contract and import that draft instead.

 Select Option 		Select Contract/Template	Select Line Item(s)	Add Information	\odot	Create	
INFORMATION	R	RiskDetails			0	Active	Ignore
Core Info	Usage	BROKER UNIQUE REFERENCE / UMR		2 Huli-Template-	25-UMR	Active	Ignore
Reference Hull-Remptite-25 Class of Business Marine Sub Class Marine Hull Jurieddon EEA Language Englinb Valid From Date		INSURED / Insured		尾 Hull-Temp	ate-25-1	Active	Ignore
		ADDRESS / Principal Address			+	Active	Ignore
		LIMITS OF LIABILITY / Limit of Liability		ℓ Hull-Template	25-LOL	Active	Ignore
		INTEREST / Interest		R Hull-Templat	e-25-1-1	Active	Ignore
		PERIOD / Period		ℓ Huli-Templ	ne-25-P	Active	Ignore
28 February 2025		INSURED'S RETENTION / (Re)insured's	retention	L Hull-Template	-25-RIR	Active	Ignore
		INDEMNITY PERIOD / Indemnity Period		🗶 Hull-Templa	10-25-IP	Active	Ignore
		TERRITORY / Situation		2 Huli-Tempi	n#-25-8	Active	Ignore
		CONDITIONS / Conditions		ℓ Hull-Temple	ne-25-C	Active	Ignore
		ADDITIONAL CLAUSES / None		ℓ Hull-Template	MRCH	Active	Ignore

Line Items are titled with the import Reference and the contract heading's initials. You can click to add contract headings as new active Line Items or to ignore them. Click 'Proceed'.

() SI	elect Option	Select Contract/Tem	plate	 Select Line Item(s) 	 Add Information 	Create
	🛛 🗹 Select All 🔫					
	RISK DETAILS	RISK DETAILS				
		BROKER UNIQUE REFERENCE	222			
	SUBSCRIPTION	INSURED	222			
	FISCAL AND	ADDRESS	222, 223, 222 222, 222	1		
	BROKER	LIMITS OF LIABILITY	Coverage and type As P	er Supporting Information. No excess		
	SECURITY DETAILS	INTEREST	Hull All Risks: Aircraft an	s per schedule against all risks of loss or damage	1	
		PERIOD	From: ???			
			To: 222 Both days at 222, 222 a	t the location of the property insured.		
			And any other period for	which the Insurer and the Insured age to rene	w the Policy.	
		INSURED'S RETENTION	N The Insured shall bear the USD 250,000 each and it	te following amount in respect of each plaim or s every claim or series of claims arising out of any	eries of claims arising out of any one Event: one Event.	
			Legal costs and expense A series of events arising	es payable in addition. In from one cause during any period of 12 consec	ative hours shall be treated as one Event.	
		INDEMNITY PERIOD	The period during which the	results of the Business are affected in conseque	nce of the Damage, beginning with the occurrence	of the Damage and ending not
			more than 24 months later.			
		CONDITIONS Words	ig as agreed by Slip Leader. Ibles:			
		Applic	able to each and every claim of type: Boeing 777X	other than total loss/ constructive total as a man	iged total loss: -	
		Anou	t. USD 500,000			

The contract or template is shown in full. By default, all its contract headings are selected. You can de/select them all, by specific contract section, or by individual contract heading. Each contract heading becomes a new Line Item. When ready, click 'Add Headings to Library'.

	Whitespace LIBRARY						Create New +
10	← () Select Option	Select Contract/Te	emplate	Ø si	elect Line Item(s)	 Add Information 	⊙ Create
ΙΖ.	6 Line Items have been identified as potent Please compare each one to its correspond matched Line Item to support future search	ial duplicates. ding potential match(es) and o capabilities.	hoose whether to add ne	w headings to the	Library as new duplicate Line Iter	(s) or to add supporting information (such as Te	am and Template Name) to the selected
	NEW MATCHING HEADINGS: 0	ADD INFO ALL	DUPLICATE ALL	IGNORE ALL	EXISTING MATCHIN	IG HEADINGS:	
	ADDITIONAL CLAUSES - Hull-TemplateCMR	сн	Add info			RC3 1WE-CMRCH	• ^
					CustomMRCHeading -	RC3 1WE-CMRCD	^^
	INSURER CONTRACT DOCUMENTATION - H	ull-Template-25-ICD	Add info Duplica	lgnore 🔨	InsurerContractDocum	tation - MRC3 1WE-ICD	^
	CLAIMS ADMINISTRATION - Hull-Template-25	-CA	Add info Duplica	e Ignore A	ClaimsAdministration -	RC3 1WE-CA	^
	EXPERT(S) FEES COLLECTION - Hull-Templa	08-25-EFC	Add info Duplica	e 1][MRC3 1WE-EFC	0^
	COUNTRY OF ORIGIN - Hull-Template-25-COO	0	Add info Duplica	o Ignore][[1WE-COO	<u></u>
	REGULATORY CLIENT CLASSIFICATION - Hu	all-Template-25-RCC	Add info Duplica	e Ignore 🔨	RegulatoryClientClass	ation - MRC3 1WE-RCC	• ^
							Proceed

Any duplicated Line Items are shown. You can add new metadata to an existing Item ('Add Info'), duplicate the Item ('Duplicate'), or cancel that Item ('Ignore'). Click 'Proceed'.



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