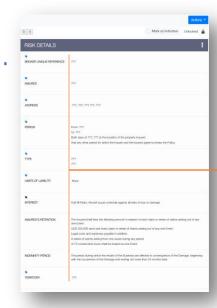
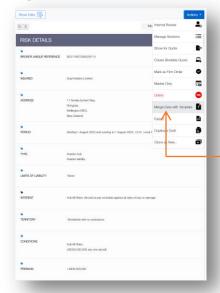
## Merging Data With a Template



Prepare a detailed contract ('template') that contains the wording you will want to re-use.

It must contain a placeholder '???' tag for each item of defined data you want to extract.

Please note: This contract must be set as a template in the platform.



You can extract data from a contract with the same tagged data as the placeholders in step one ('source').

Select 'Merge Data with Template' from the blue drop-down 'Actions' menu.

Please note: This contract must be editable – a draft, a draft bindable quote, or a draft firm order.

The resulting combined contract contains the full text of the 'template' and populates the data from the 'source' into the matching placeholder tag fields.

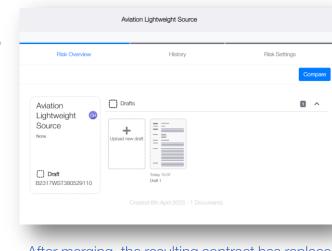
6

Please note: This process overwrites the 'source' contract.



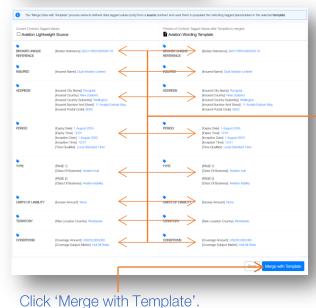
Read the notice, tick the box to confirm your understanding of the process, and click 'Proceed'.

Please note: Only matching data fields are preserved. All other text and data is discarded.



After merging, the resulting contract has replaced the lightweight source.

Please note: The original 'source' contract is not preserved. Verisk



Verify that the data matches in the two columns.

Please note: You can proceed without a perfect match, but data will be lost.





