Building a New Template or Contract from the Contract Library

Whitespace LIBRAF Verifik business LiBRAF	Create New	Build •		With a well-populated Contract Library, creating a new template or contract in the Whitespace Platform is extremely fast and straight- forward.
_			Cancel	

Click the 'Create New +' button in the top bar anywhere in the Contract Library, and then select 'Contract/Template Using Library' under the 'Build' title.

			 Build 	💿 Confirm		Contract Libraries		
		MUSETTI O	MUSETTI O			will amass		
		Placement	Placement Type: FullContract O Use Guide Go Manual Team: AVIATION TEAM Layout Guide: Aviation-Global-Standard-20		Global-Standard-2024	thousands of Line Items for various		
FISCALANDREGULATORY	~ ~	Drag and ordering	drop selected headings to the contr automatically. If you wish to manuall	act area. The Layout Guide selected y manage the ordering switch to Man	all manage the x sal Layout.	use cases. While		
		RISK DETAILS	RISK DETAILS		۵ ۷	you can search for		
BROKERREMUNERATIONANDDEDUCTIN	ons ~				I	Line Item, filtering		
		INFORMATION			Ū ~	likely to be vital.		
						Layout Guides do		
		SECURITY DET	NLS		⊕ ~	automatic filtering		
				Cancel	Back Proceed			

In the 'Build' tab, you are presented with a summary of the library's Line Items grouped by section heading. Click the black 'Filter' button to restrict the list to just Line Items appropriate to your new template/contract.



To create a template, you need 'Template Manager' permission for the team that will receive the new template.

Enter core information in the top line. 'Placement Type' selects creation of a template or draft contract. You can assemble a contract manually, or click 'Use Guide' and then pick a Layout Guide to automatically slot Line Items into the defined locations. Click 'Proceed'

E Select Option	Define New Contract/Template	FILTERS Select one or more value	s to refine your search.		
LIBRARY LINE ITEMS: 0		CORE INFORMATION			
Text 🗸 Sea	rch Q S Filters	Title	Re	ference	
Select 232 (from 232) Line Items					
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			*		
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E PLACINGDATA					Apply

When necessary, filters can be used to identify individual Line Items to include one at a time. However, it is significantly

However, it is significantly faster to filter for terms that are common to all the Line Items for inclusion.

The 'Filters' pane allows you to filter by any or all elements of Line Item metadata. 'Reference' and 'Group Names' are usually the most helpful filters. Group Names are specifically intended to allow different Line Items to be associated easily. Click 'Apply Filters' to filter the page.



3

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Using a Layout Guide, added Line Items will automatically be added to their appropriate position under their designated Section Heading. Click 'Go Manual' to drag items to reorder them as necessary, but note re-clicking 'Use Guide' will undo

Click on an item to expand it, including to see the Line Item's contents. Tick a checkbox to select all filtered Items, all items under a section heading, all items under a contract heading, or an individual line item, then click the blue 'Move Selected' button. Click 'Proceed' when all items are ready.

(H)	Good afternoon, Gail. Select My Actions for risks requiring your attention					ur	Search Q
	GHM Broker						
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Artemisia Retail no	100% Firm Order	Declaration	B0999JC1402220905	Gail McNeillie	01 Mar 2022	:	01 Actions

The newly created template or contract is likely to be at or near the top of the Dashboard, unless the team it is created in is verv busy, or you wait an extended period of time before returning to the platform.

When you return to the Whitespace Platform, the newly-created contract is listed in the dashboard like any other new contract or template. Click on the dashboard item to open the overview panel and then on the page icon to open the contract view.



The 'Information' panel to the left provides a recap of the details of the template or contract.

The 'Confirm' pane lets you examine the new template/contract. Click on an item to expand it and see its text and tagged data values. Incorrect items can be deleted by clicking the 'Trash' icon, or click 'Back' for other changes. Click 'Save' to create the new template/contract.



Data values can be excluded from a version check so that, say, a different date doesn't flag the item as changed.

Soon, you will be able to compare items side by side with a single click, and even to update the platform document.

Builder Templates and contracts track whether the equivalent Library Line Items still match, via a book icon. Green means the items are the same, yellow that the library has been updated, and red that the Platform document has been changed.



5