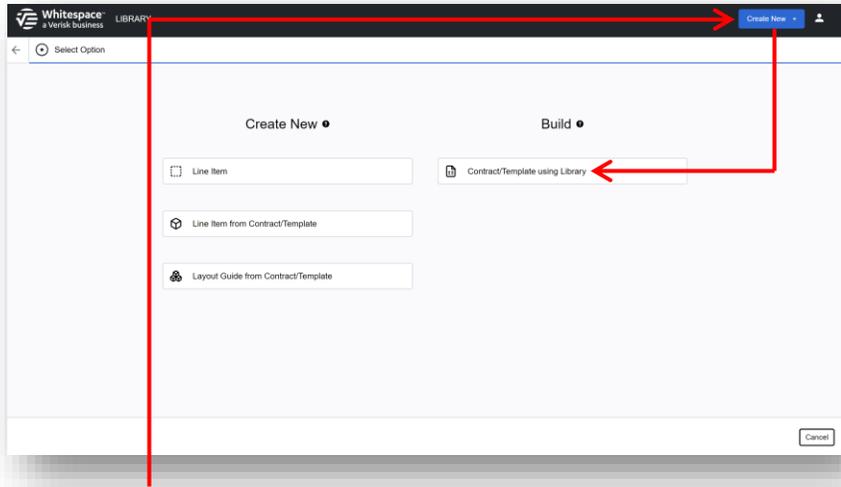


# Building a New Template or Contract from the Contract Library

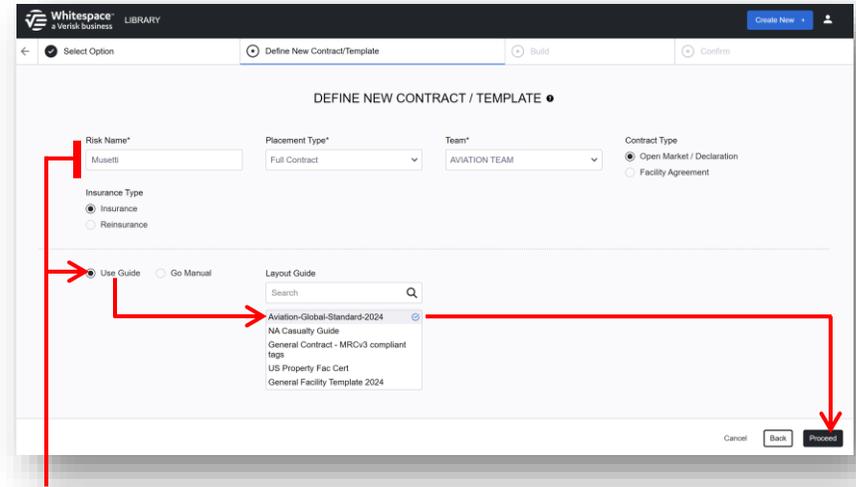
1.



With a well-populated Contract Library, creating a new template or contract in the Whitespace Platform is extremely fast and straightforward.

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.

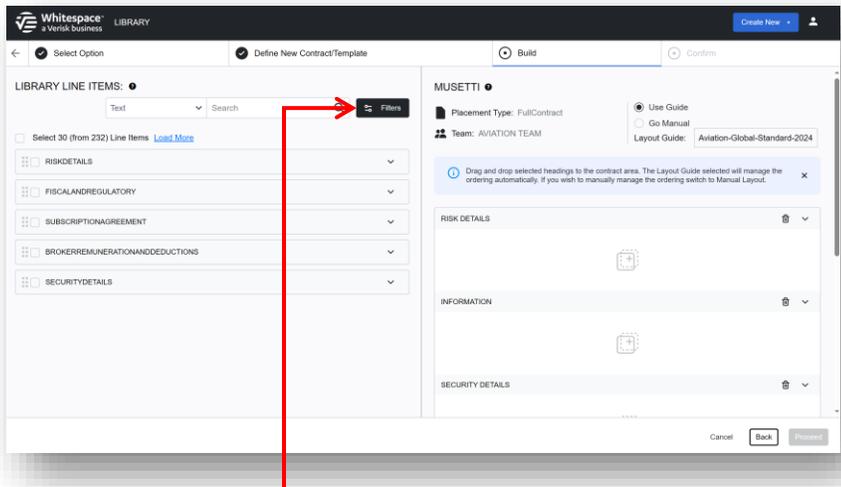
2.



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'

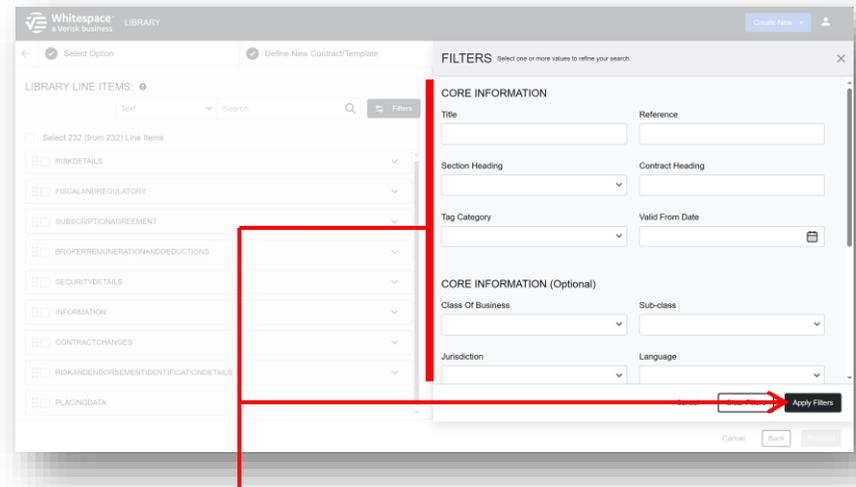
3.



Over time, some Contract Libraries will amass thousands of Line Items for various use cases. While you can search for text appearing in the Line Item, filtering is likely to be vital. Layout Guides do not perform any automatic filtering.

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.

4.

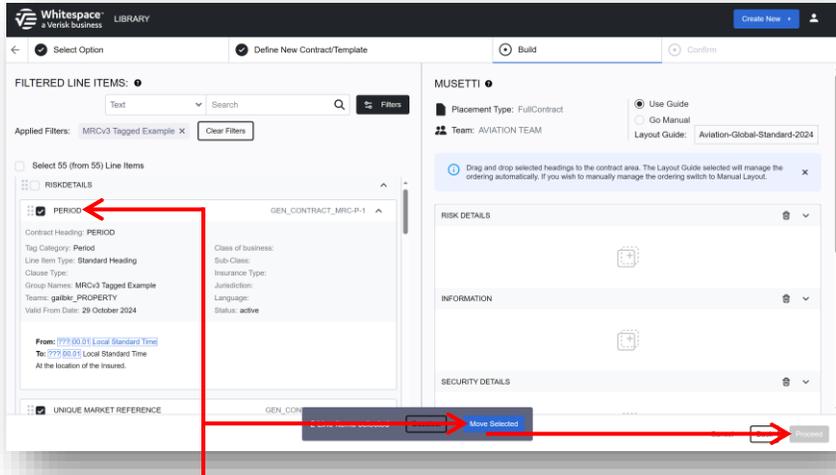


When necessary, filters can be used to identify individual Line Items to include one at a time. However, it is significantly faster to filter for terms that are common to all the Line Items for inclusion.

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.

# Building a New Template or Contract from the Contract Library

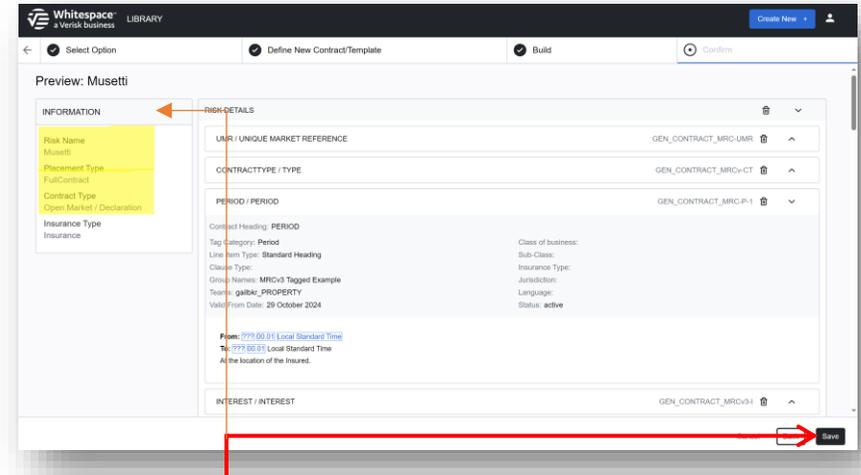
5.



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 any changes.

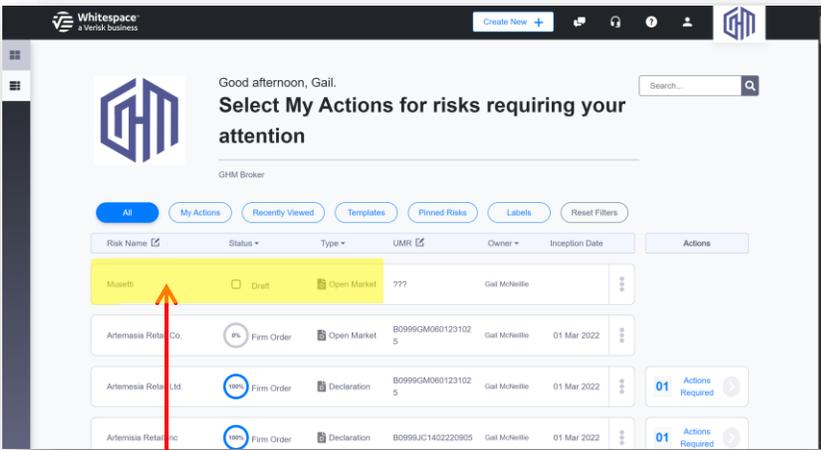
6.



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.

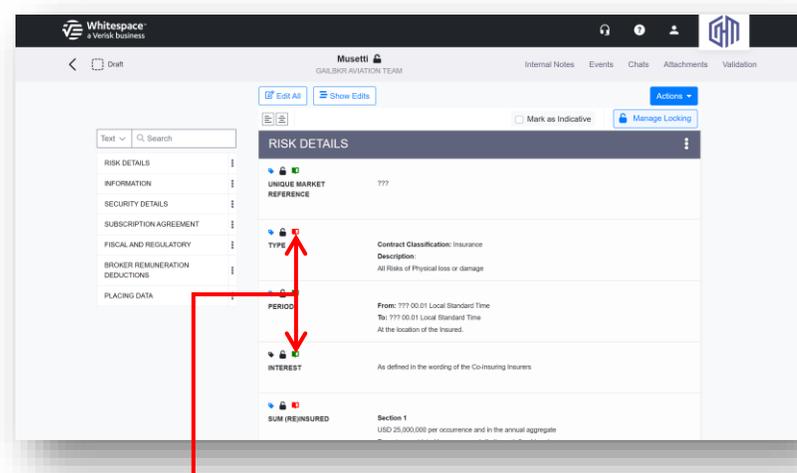
7.



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 very 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.

8.



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.