Creating and Cloning Templates

1 b



For a new template, you can click the 'Create New +' button at the top of the dashboard screen to open the 'Create New' box. This provides several options for creating a template.

< 🌞 Firm Order	Cold Ha DEDOPULC	rbor 🏔 Internal Note IS All Risks	s Events Chats Attachments	Validation
			Act	ions 👻
Text v Q Search	RISK DETAIL		Internal Review	2 ,
RISK DETAILS	•		Show Firm Order	₽>
	UMR	B2317WST380529104	Create Endorsement	٦.
FISCAL AND REGULATORY	ТУРЕ	Aviation Hull and Liability Insurance - Retrocession Breach Voyage Primary	View Written Lines	<i>(</i> 4
BROKER REMUNERATION AND DEDUCTIONS			Record Off-Platform lines	6
SECURITY DETAILS	Sections	<u>\$1</u>	Export	6
LACING DATA		Section Description: Primary Layer for se Placing Broker Reference: 80090	Clone as New Y	-
		S2 Section Description: Secondary Layer fo Placing Broker Reference: K0091	Insert Content from Contract/Template	
	Policyholder	Joe J1 22, StreetS Alaska Andronage Linked Status – 987608 Code: Námero de Identificação Fiscal Federal Empl	loyer Identification Number (FEIN) - PHIC001	

You can also duplicate any existing contract you have access to as a new template. Open the contract instance you wish to template, and select 'Clone as New' from the blue drop-down 'Actions' menu.

select document(s) to upload.	
ze File(s)	
DRAFT	TEMPLATE
se select Team(s)	Please select Team(s)
JI Risks	All Risks
roperty	Property
.yber	Cyber
laring	Marine
ianie	

The new 'Upload JSON as new Contract/Template' system lets you import a template file exported from the Whitespace platform by a colleague. A full guide to this system is **available here**.

This creates a new placen	nent by copying information from this contract.
New Placement Type	Full Contract
New UMR	Full Contract Template Off-Platform Contract
New Risk Name	Cold Harbor

In the 'Clone' pop-up box, select 'Template' as the placement type for the new contract, and click the 'Clone' button.



3

Please Note: Only users with the 'Template Manager' permission are able to create or edit templates. If in doubt, please speak to one of your organisation's Whitespace Platform Admin users to verify that you have this status.

The 'Digitise' and 'Full Contract' options allow you to create a contract based on a Word/PDF file or a blank slate respectively. Pick 'Template' as the placement type and click 'Create'.

WHITESPACE 寝 Verisk < 🕞 Template Detailed Template Contract 🔒 Internal Notes Events Chats E E EE Mark as In Manage Secti ≔ Text v Q. Search ISK DETAILS 0 Delete RISK DETAILS Ó Export INFORMATION ø Clone as Nev SUBSCRIPTION AGREEMENT FISCAL AND REGULATORY Insert Content from Contract/Template BROKER REMUNERATION AND DEDUCTION SECURITY DETAILS 222 222 222 222 222 222 ADDR LIMIT Coverage and type As Per Supporting Information. No ex

The new template can be edited as needed. The text "???" is a valid placeholder value for **all** tagged data fields, making it highly suitable for template use.

To create a new contract from the template, Click 'Clone as New' from the 'Actions' menu and select 'Full Contract' or 'Off-Platform Contract' as appropriate for the placement type.



2a.

Whitespace Software Limited – Registered in England & Wales Company No. 02020348 OTF Faction Registered Address – 26th Floor, 22 Bishopsgate, Bishopsgate, London, EC2N 4BQ, United Kingdom This document is proprietary and confidential. No part of this document may be disclosed in any manner to a third party without the prior written consent of Whitespace Software Limited. Whitespace is part of Verisk