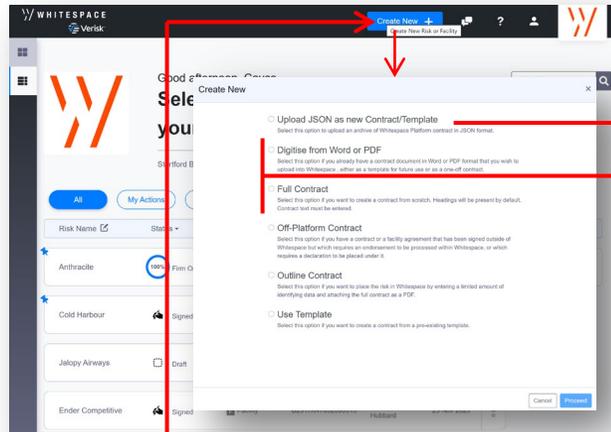


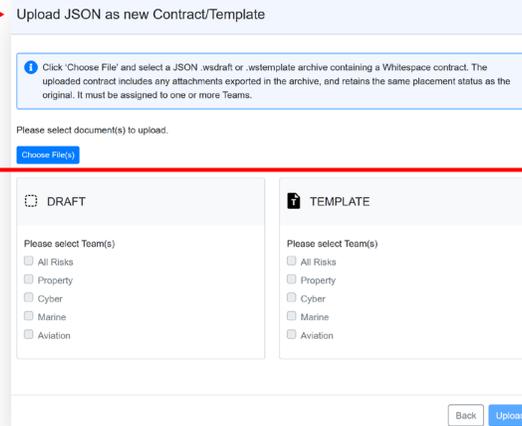
Creating and Cloning Templates

1a.



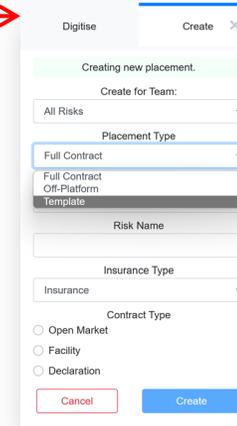
For a new template, you can click the 'Create New +' button at the top of the dashboard screen to open the 'Create New' box. This provides several options for creating a template.

1b.



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](#).

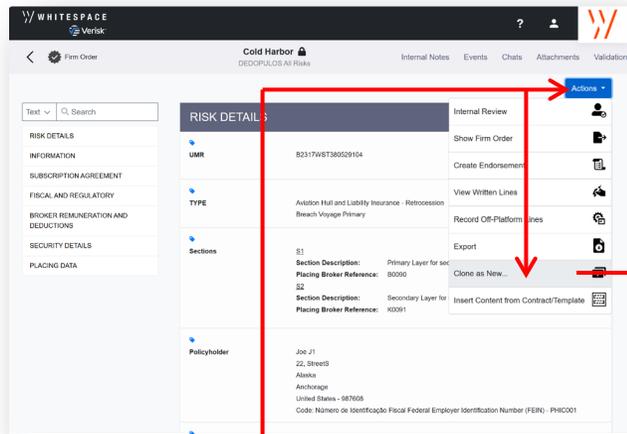
1c.



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'.

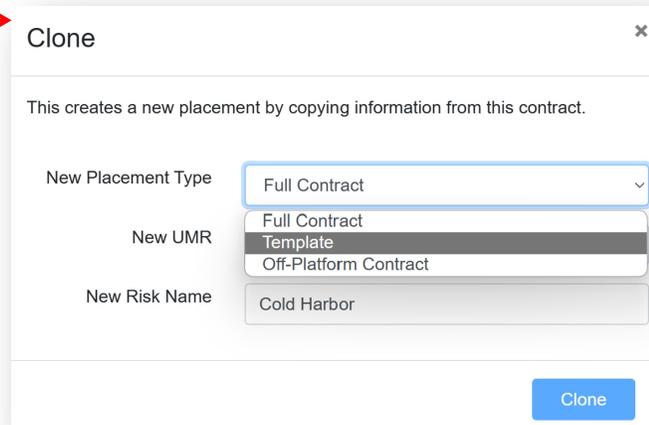
Please Note:
Only users with the 'Template Manager' permission are able to create or edit templates. If in doubt, please speak to one of your organisation's Whitespace Platform Admin users to verify that you have this status.

2a.



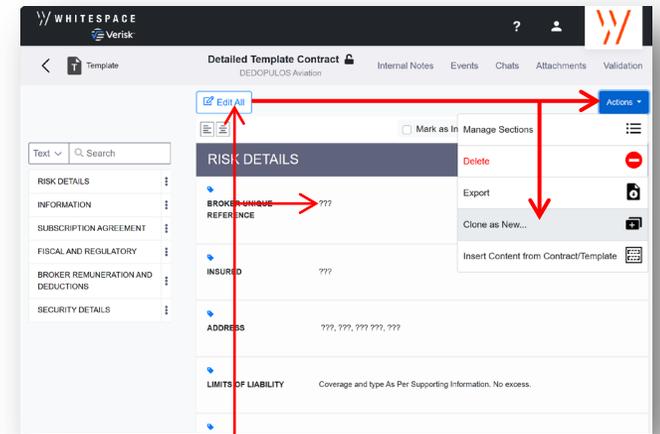
You can also duplicate any existing contract you have access to as a new template. Open the contract instance you wish to template, and select 'Clone as New' from the blue drop-down 'Actions' menu.

2b.



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

3.



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.