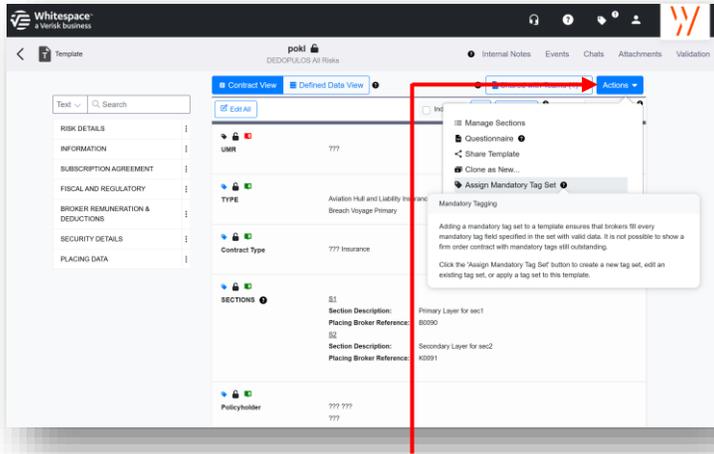


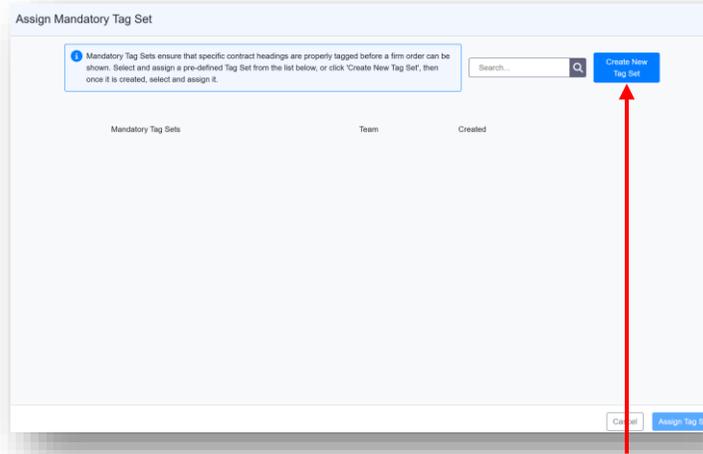
Creating and Assigning Mandatory Defined Data Tag Sets

1.



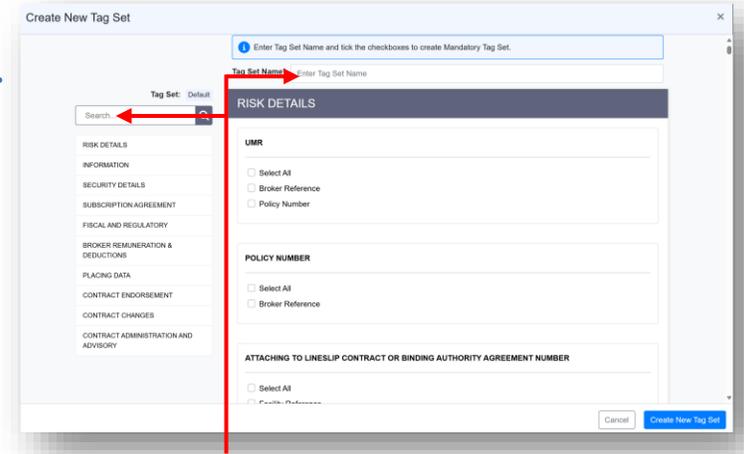
Mandatory tag sets list the Defined Data tags that must be completed before showing at firm order. Only Template Managers can create tag sets – to do so, click 'Actions' from any Contract View and select 'Assign Mandatory Tag Set'.

2.



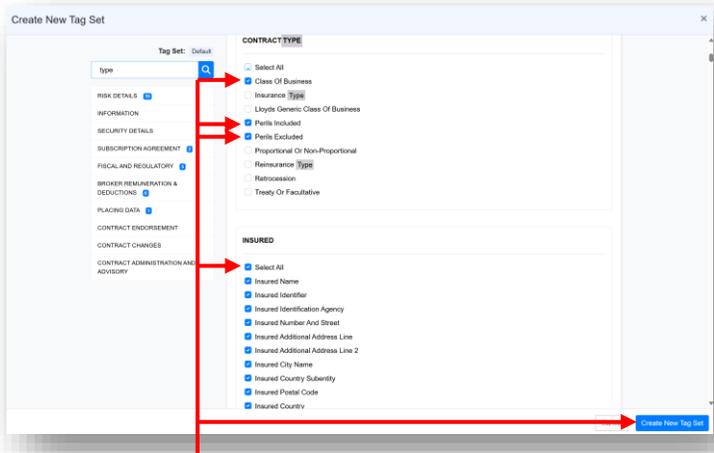
There are no default tag sets provided by Whitespace, so initially, the list of tag sets in the 'Assign Mandatory Tag Set' window will be empty. To start a new set, click the 'Create New Tag Set' button.

3.



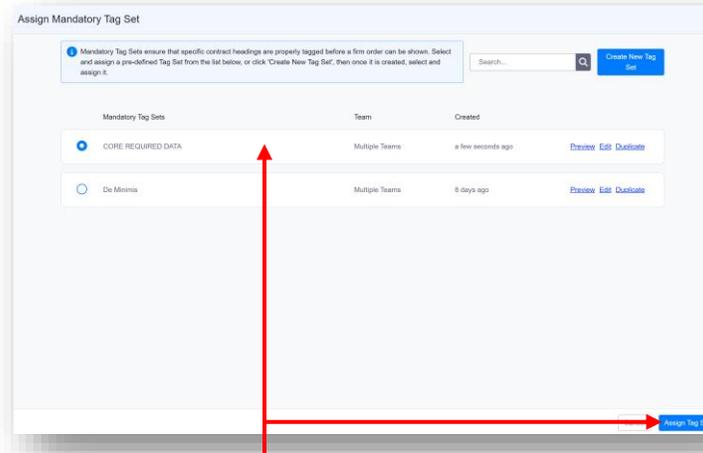
The 'Create New Tag Set' window lists every data tag field in the Whitespace Platform, organised by section heading and contract type. It can be scrolled or searched to find the tags you need. Every tag set needs a descriptive name.

4.



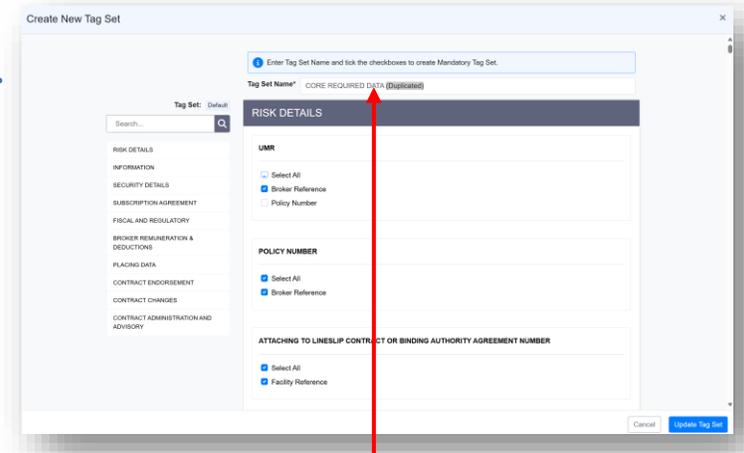
Tick individual tags under a contract heading for inclusion as required, or click the 'Select All' box at the top of the list to tick all of the heading's tags. Click 'Create New Tag Set' to save the set. Template Managers can assign tag sets to Templates.

5.



Click a tag set and then 'Assign Tag Set'. Cloned templates and contracts inherit tag sets. Assigning a tag set replaces an older set. All brokers can assign a tag set when cloning from an unassigned source, using JSON import, or when a contract is editable.

6.



Tag sets can be duplicated and edited by Template Managers. Note that edits affect all assigned templates and contracts. It is good practice to ensure that tag sets' names are unique and helpfully identify the set's purpose.