## Creating and Assigning Mandatory Defined Data Tag Sets

C Template	<b>p</b> i Dedopu	oki 🚔 JLOS All Risks	Internal Notes Events Chats Attachments Validat	
	Contract View	Defined Data View	Actions -	
Text 🗸 🔍 Search	Edit All			
RISK DETAILS			III Manage Sections	
INFORMATION	I UMR	222	< Share Template	
SUBSCRIPTION AGREEMENT	:		Clone as New	
FISCAL AND REGULATORY	:	Aviation Hull and Liability Ins Breach Voyage Primary	Assign Mandatory Tag Set O	
BROKER REMUNERATION &	TYPE		Mandatory Tagging	
DEDUCTIONS		??? Insurance	Adding a mandatory tag set to a template ensures that brokers fill every	
SECURITY DETAILS	Contract Type		manipatory tag new spectred in the set with valid data, it is not possible to show a firm order contract with mandatory tags still outstanding.	
PLACING DATA	1		Click the 'Assign Mandatory Tag Set' button to create a new tag set, edit an	
	s 🔒 🗉	51 Section Description:	existing tag set, or apply a tag set to this template.	
	SECTIONS O		Primary Laver for sect	
		Placing Broker Reference	8: 80090	
		Section Description:	Secondary Layer for sec2	
		Placing Broker Reference	80 K0001	
	A #			
	Policyholder	777 777		

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'.

	Tag Set: Default	CONTRACT TYPE	1
	type Q	G Select All	
•		Class Of Business	
	RISK DETAILS	Insurance Type	
	INFORMATION	Lloyds Generic Class Of Business	
	SECURITY OFTAILS	Perils Included	
		Perils Excluded	
	SUBSCRIPTION AGREEMENT	Proportional Or Non-Proportional	
	FISCAL AND REGULATORY 3	Reinsurance Type	
	BROKER REMUNERATION &	Retrocession	
	DEDUCTIONS O	Treaty Or Facultative	
	PLACING DATA		
	CONTRACT ENDORSEMENT		
	CONTRACT CHANGES	INSURED	
	CONTRACT ADMINISTRATION AND	G Select All	
		Insured Name	
		Insured Identifier	
		Insured Identification Agency	
		Insured Number And Street	
		Insured Additional Address Line	
		Insured Additional Address Line 2	
		Insured City Name	
		Insured Country Subentity	
		Insured Postal Code	
		Insured Country	

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.



Mandatory Tag Sets ensure that spy shown. Select and assign a pre-defi once it is created, select and assign	acific contract headings are properly tagged I ined Tag Set from the list below, or click 'Crea it.	before a firm order can be ate New Tag Set', then	Search Q	Create New Tag Set	
Mandatory Tag Sets	1	'eam	Created	T	
					Tao Pet

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.

Mendetory Tag Sets ensure that specific contract headings an and assign a pre-defined Tag Set from the list below, or click " assign it.	re property tagged before a firm order can be shown. Sek 'Create New Tag Set', then once it is created, select and	Search	Croate New Tag Set
Mandatory Tag Sets	Team	Created	
O CORE REQUIRED DATA	Multiple Teams	a few seconds ago	Preview Edit Duclicate
O De Minimis	Multiple Teams	8 days ago	Preview Edit Duplicate

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.

	Enter Tag Set Name and tick the checkboxes to create Mandatory Tag Set.	
	Tag Set Name Enter Tag Set Name	
Tag Set: Dela	RISK DETAILS	
Search		
RISK DETAILS	UMR	
INFORMATION	Solert All	
SECURITY DETAILS	Broker Reference	
SUBSCRIPTION AGREEMENT	Policy Number	
FISCAL AND REGULATORY		
BROKER REMUNERATION & DEDUCTIONS	POLICY NUMBER	
PLACING DATA		
CONTRACT ENDORSEMENT	Select All	
CONTRACT CHANGES		
CONTRACT ADMINISTRATION AND ADVISORY		
	ATTACHING TO LINESLIP CONTRACT OR BINDING AUTHORITY AGREEMENT NUMBER	
	Select All	

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

	Enter Tag Set Name and tick the checkboxes to create Mandatory Tag Set.
	Tag Set Name* CORE REQUIRED DATA (Duplicated)
Tag Set:	
Search	Q Not DETAILS
RISK DETAILS	UMR
INFORMATION	
SECURITY DETAILS	Select All Select All Select All
SUBSCRIPTION AGREEMENT	Policy Number
FISCAL AND REGULATORY	
BROKER REMUNERATION & DEDUCTIONS	POLICY NUMBER
PLACING DATA	
CONTRACT ENDORSEMENT	Select All
CONTRACT CHANGES	Broker Reference
CONTRACT ADMINISTRATION A ADVISORY	NO
	ATTACHING TO LINESLIP CONTRACT OR BINDING AUTHORITY AGREEMENT NUMBER
	Select All
	Facility Reference

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.

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