Fill in one of your precedents from a matter

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Your precedents stay your own Word documents. Mark where the client's name, the property or a key date goes, and Desk fills them in from the matter whenever someone makes a copy.

Before you start
An admin switches on the **Precedents** pack first. See Switch on a pack.

1 Mark the fields in your Word document

Go to **Documents** › **Precedents**

Wherever Desk should fill something in, type the field's name in double braces, like **{{Client name}}**. Press **Import a Word file** and open **Fields to type in braces** to see every one, grouped by client, matter, fee earner, other party, key dates and your firm.

Press **Copy** beside a field and paste it into Word, so the spelling is exactly right.

2 Import the precedent

In **Import a Word file**, choose the **Word document**, pick its **Work type** and press **Import it**. It takes the file's name unless you give it a **Title**, and sits beside the precedents written in Desk.

3 Make a copy on a matter

Go to **Matters**

Open the matter and press **From a precedent** at the top, then choose the **Precedent**. Each field shows what the matter fills it with. Type in anything the matter doesn't know yet, or change what it suggests, and press **Make the document**.

4 Finish it

The filled-in copy is in the matter's **Documents**. Open it in Word to finish it off, or send it for signing like any other document.

5 Keep the wording current

Go to **Documents** › **Precedents**

When the wording changes, open the menu on the precedent, press **Replace the Word file**, choose the new version and press **Put it in**. Copies already made on matters stay as they were.

If something goes wrong

The matter says there are no precedents for this work type yet.
Each precedent belongs to a work type. Add one for this matter's work type under **Documents**, then **Precedents**, or change the work type of one you already have.

Your Word precedents aren't in the list.

The **Precedents** pack is off. Ask your Desk admin to switch it on.