

Make a template

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A template is a document your team starts from instead of a blank page, like your engagement letter. You can leave fields for the details that change each time, and lock wording that must stay exactly as it is.

Before you start

You need to be an admin in Desk to make or change templates. Everyone with a seat can start a document from one.

1

Start a template

Go to **Documents** > **Templates**

Press **New template**, give it a **Title** like "Engagement letter" and press **Start the template**.

2

Write it

Write it as you would any document. It saves as you type, and you can choose its letterhead from the **Letterhead** list.

3

Add the fields to fill in

Put the cursor where something changes each time and press **Field to fill in**, the braces button in the toolbar. Say **What goes here**, like "Client's name" or "Completion date", and press **Add field**.

Use the same wording for a field that appears twice, and it's only asked for once.

4

Lock the wording that mustn't change

Select the paragraphs and press **Lock this section**, the lock button in the toolbar. Nobody can change a locked section in a document made from the template, though they can write above and below it.

5

Check it

Press **Preview** to see the PDF. Your team can use the template as soon as you've written it.

Using a template

1. Press **Write a document** on a matter, or **New document** under **Documents**.
2. Pick the template in **Start from** and press **Start writing**.
3. Write whatever else the document needs. When you press **Finish**, Desk asks for each field and puts your answers in the PDF.

Preview in the same window shows the PDF with your answers in it, so you can check before you finish.

Changing or removing a template

Open it from **Templates** and change it. Documents already started from it stay as they are. Press **Delete template** above the page to remove it.

If something goes wrong

There's no **New template button.**

Only admins in Desk can make templates. Ask your Desk super admin to make you an admin, or to make the template for you.

You can't see the field or lock buttons.

They only show while you're editing a template, not an ordinary document. Open the template from **Templates**.