

Document Templates

Document templates, formerly called print templates, can be used to create contracts, invoices, letters, and other dynamic documents. A document template is a pre-written document that can change the information it contains depending on the record it is attached to.

Templates must be created and published before they are available, usually with the Agiloft Contract Assistant for Word. After you publish a document template, you can use it to create a document and attach it to a record, as well as use it to preview what a certain record would look like in that template.

Users can access existing document templates, create new templates, and manage templates in Word with the Agiloft Contract Assistant. You can also create and manage document templates in the [Document Template Table](#). However, most users will not actually create document templates; rather, they generate existing templates from a Contract record by clicking a button linked to a Generate Document action. A user's [group permissions](#) settings determine whether they can generate documents from templates.

Document templates are usually created with the .docx file type. In some rare cases, you may also use PDF and HTML file types.



For information about document templates in the default Contracts table, see the Create Contracts section of the [Contracts Table](#) article.