USER GUIDE · COMMERCIAL

Saved Fill In Versions in Generate Document

Type your document details once. Every set of values you fill in is kept as a version (v1, v2, v3…). The next time you generate from the same template, one click fills them all in.

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1. What it does and why

When you generate a document from a template (a subcontract agreement, a variation, a payment schedule…), Deep Space fills in everything it already knows: your company details from Company Settings and the contract details from the record. Anything the template needs that Deep Space has no source for is listed under **Fill In**, and until now you had to type it every time.

Saved Fill In versions remove that retyping:

- Click **Save as version**, or simply generate the document, and the values you typed are kept as a numbered version: **v1**, **v2**, **v3**…
- Next time, open Generate Document on any record that uses the same template and click a version. Every Fill In field it holds is filled in at once.
- The values stay editable. Change what is different for this contract and generate.

> **In short**
> Enter the details once, then reuse them on every contract that follows.

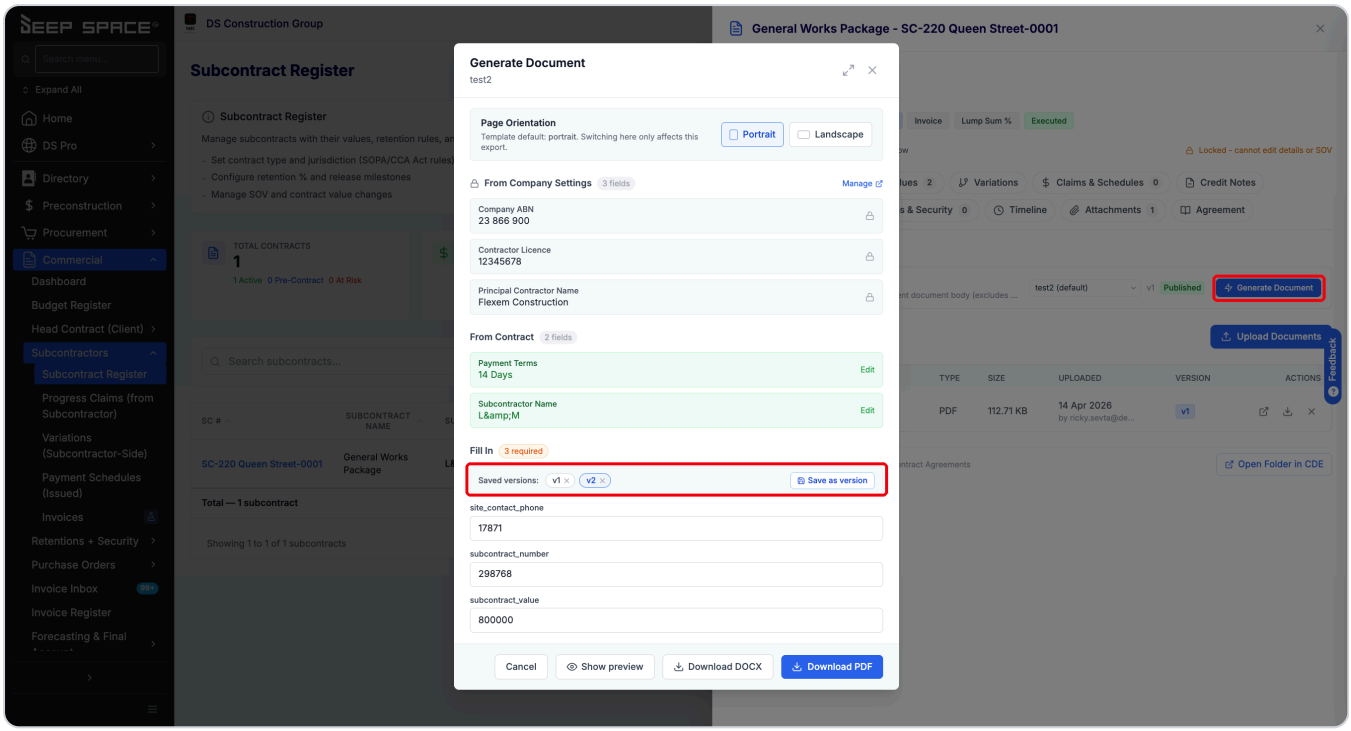
What it is not

- It does not change the template or your Company Settings.
- It does not change the contract record. Values are only used for the document you are generating.
- It only covers the **Fill In** fields. Company and contract fields keep coming from their sources.

2. Where to find it

Saved versions live inside the **Generate Document** dialog, so there is nothing to switch on or configure. For a subcontract agreement:

`Commercial` › `Subcontractors` › `Subcontract Register` › `open a subcontract` › `Documents` › `Generate Document`



Subcontract Register: open a subcontract, click **Generate Document** (top red box). The saved versions bar sits under **Fill In** (bottom red box).

The same dialog is used for every document Deep Space generates from a template, so the feature is available everywhere Generate Document appears, including:

Area	Examples
Subcontracts	Subcontract agreements, subcontract variations, payment schedules, progress claims
Head Contract (Client)	Head contract documents, head contract variations, client payment schedules, progress claims
Procurement	Purchase orders
Invoices	Head contract and subcontract invoices

3. A quick tour of the Generate Document dialog

The dialog groups the template's fields by where their values come from:

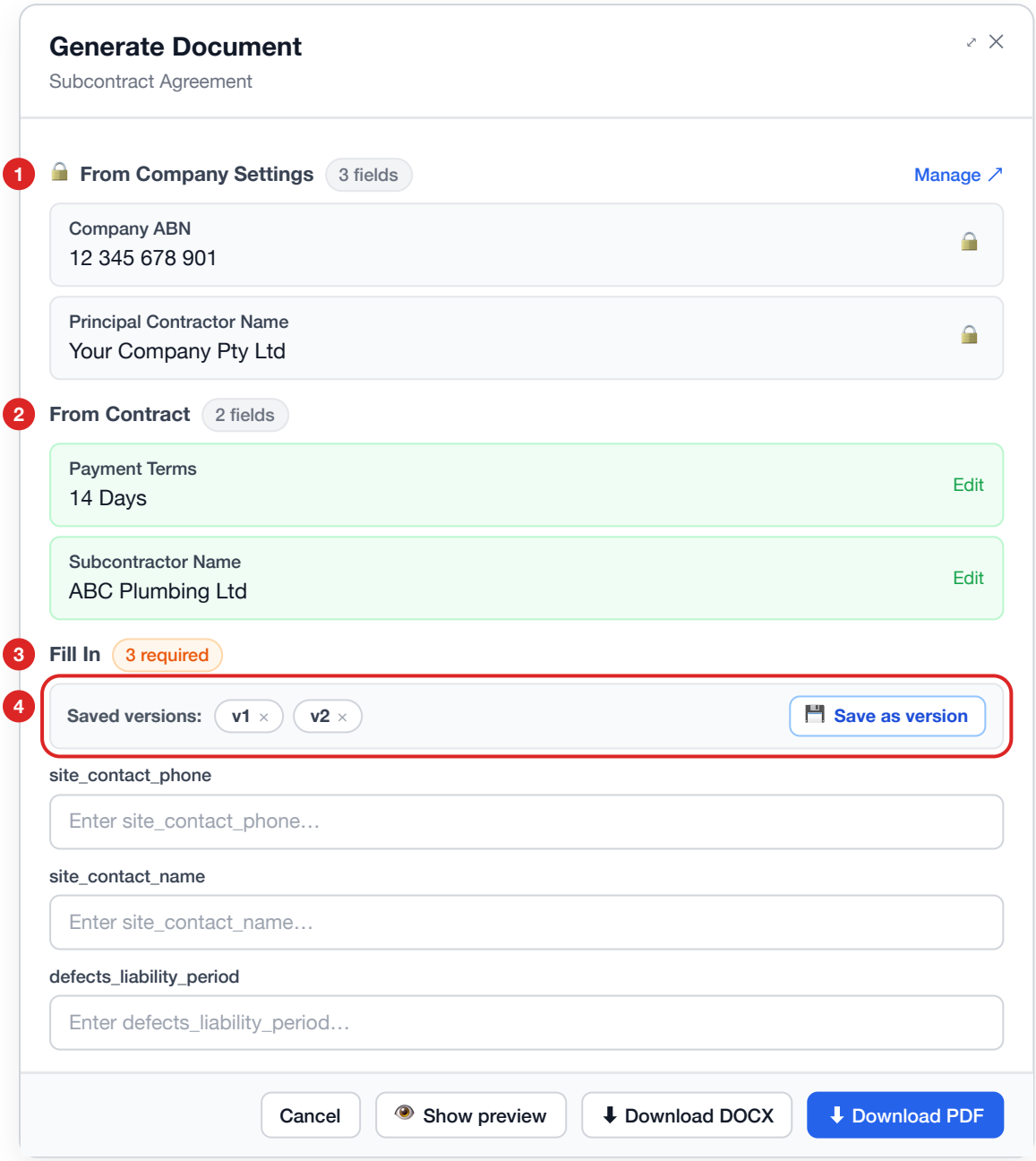


Illustration of the Generate Document dialog. Field names depend on your template.

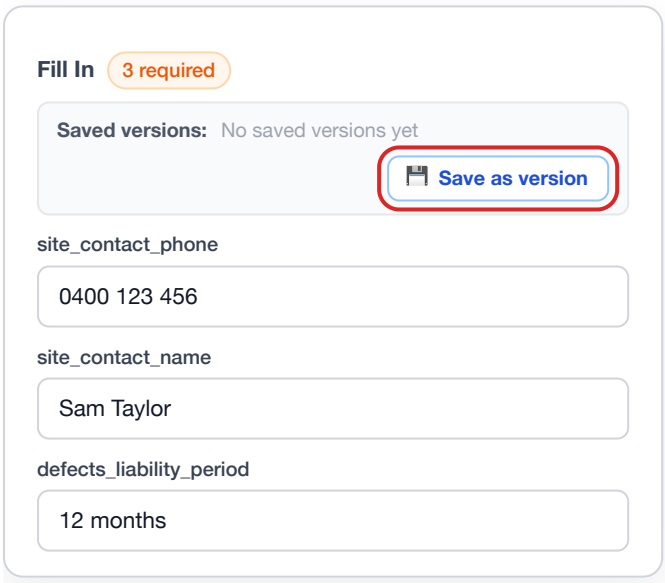
1. **From Company Settings**: read-only, taken from Company Settings. Admins can change them with *Manage*.
2. **From Contract**: pre-filled from the record. Use *Edit* to adjust them for this document only.
3. **Fill In**: fields with no source in Deep Space. You type these.
4. **Saved versions bar**: your saved sets of Fill In values, plus the **Save as version** button.

The saved versions bar

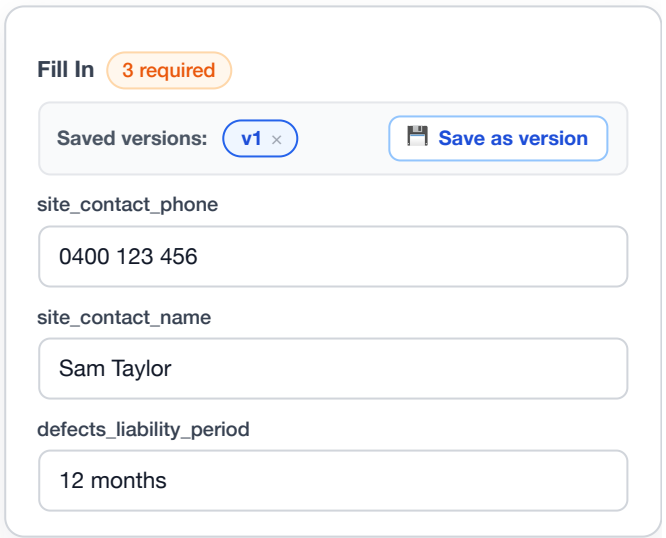
What you see	Meaning
Loading saved versions…	Versions are being fetched. This takes a moment when the dialog opens.
No saved versions yet	Nobody in your workspace has saved values for this template yet.
v1 × v2 ×	Saved versions. Click one to fill the form. The × deletes it.
v2 ×	Highlighted: the form currently holds exactly this version's values.
⚠ Saved versions couldn't be loaded	A connection problem. You can still type values and generate as normal. Reopen the dialog to try again.

4. Saving your first version

1. Open **Generate Document** on the record, e.g. a subcontract's **Documents** tab.
2. Type the values under **Fill In**. You do not need to complete every field. Only fields with a value are saved.
3. Click **Save as version**. A confirmation appears and the new chip shows up straight away.



Type the values, then click Save as version.



v1 appears and is highlighted.

✓ Saved as v1

> **Generating also saves**
> When you click **Download PDF** or **Download DOCX**, the Fill In values used for that document are saved as a version automatically. If you forget to click Save, the values are still kept.

When the button is greyed out

Save as version is disabled until at least one Fill In field has a value, because there is nothing to save yet.

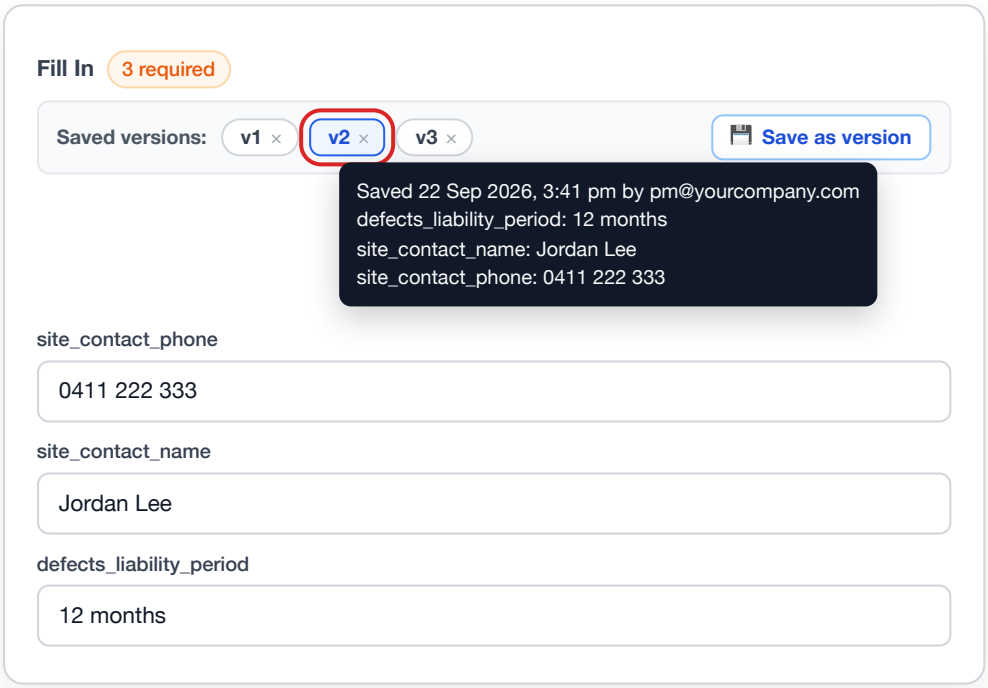
Saving the same values twice

If the values match an existing version exactly, Deep Space does not create a duplicate. It tells you which version already holds them:

> ℹ These values are already saved as v1

5. Reusing a saved version

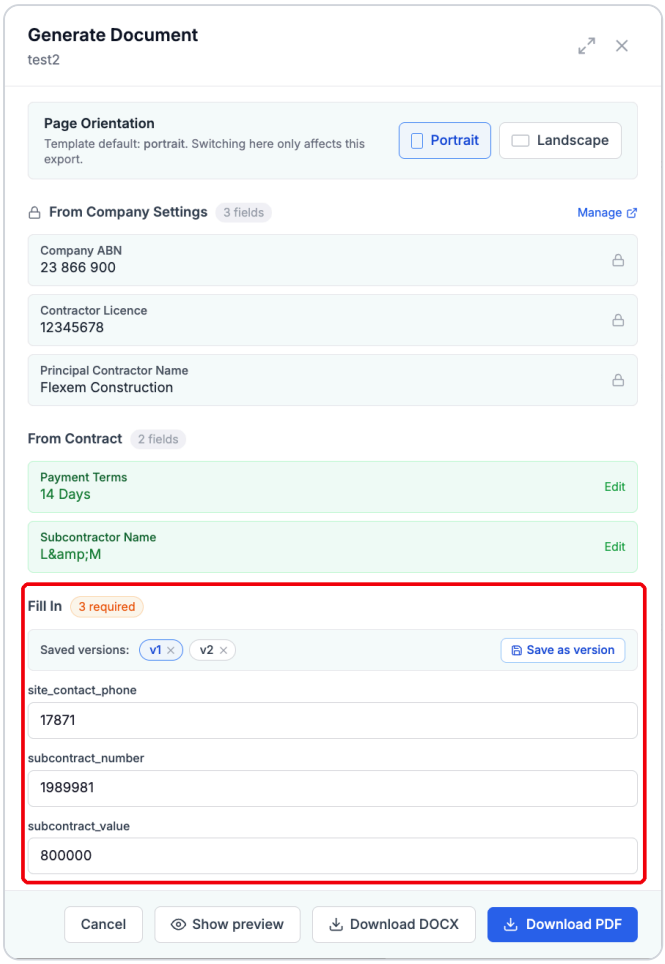
1. Open **Generate Document** on the next record that uses the same template.
2. Hover over a chip to check what it holds. The tooltip shows when it was saved, who saved it, and every value.
3. Click the chip. Every Fill In field the version holds is filled in and the chip is highlighted.
4. Adjust anything that is different for this contract, then **Download PDF** or **Download DOCX**.



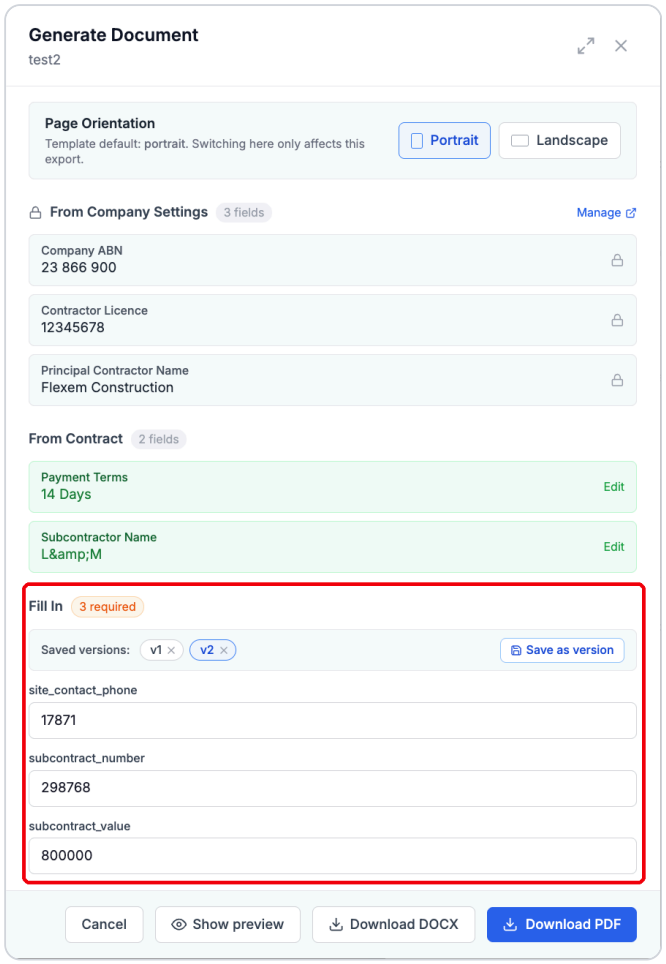
Hover to preview a version. Click to fill the form with it.

Example: switching between versions

Below is the same subcontract with two saved versions. Clicking **v1** or **v2** swaps every Fill In value in one go, and the highlighted chip shows which version the form holds.



v1 selected: subcontract_number 1989981



v2 selected: subcontract_number 298768

How applying works

- **Fields the version holds** are replaced with the saved values.
- **Fields the version does not hold** keep whatever is currently typed. Nothing is cleared.
- **Fields the template no longer asks for** are ignored, so a version stays usable after the template changes.
- Once you edit a value, the highlight goes away because the form no longer matches that version exactly. This is expected.

6. Managing versions

Updating a version

Versions are never overwritten, so a value on a document that has already gone out is never changed after the fact. To "update" a set, apply it, change the values, and click **Save as version** (or generate). The result is saved as the next number, e.g. **v4**, and the older version stays available.

Deleting a version

1. Click the × on the chip.
2. Confirm the prompt: "*Delete saved version v2 for everyone in this workspace?*"

> **Deleting affects everyone**
> Versions are shared across the workspace, so a deleted version disappears for your colleagues too. Documents already generated are not affected.

Numbering and limits

- Numbers always go up. If v2 is deleted, the next save is still v4 (not v2), so a version number always refers to one specific set.
- Each template keeps its **20 most recent** versions. When a 21st is saved, the oldest is retired automatically.

7. Who can see versions, and which templates share them

Question	Answer
Who sees my saved versions?	Everyone in your workspace who can generate documents from that template. A colleague's versions show up for you, and yours for them. The tooltip shows who saved each one.
Do versions follow the template or the record?	The template. A version saved while generating for one subcontract is offered on every other subcontract that uses the same template.
What happens when the template is revised?	Versions belong to the template **family**, so a new version of the template (e.g. revised and re-published) keeps offering them.
Are different templates kept apart?	Yes. Your subcontract agreement's versions do not appear on a purchase order or a head contract template.
Are other workspaces affected?	No. Versions never leave your workspace.

8. Saved versions vs custom fields

Deep Space also lets you add **custom fields** to contracts. The two features suit different kinds of value:

	Custom fields	Saved Fill In versions
Stored on	Each individual contract record	The template, shared across the workspace
Best for	Values that are **different on every contract** and belong to it (e.g. a contract-specific reference number)	Values that **repeat across contracts** (e.g. the site contact on a project, standard periods and options)
How it's used	Entered once on the contract, then available in registers and every document mapped to it	Picked with one click while generating a document
Set-up	The field is configured and mapped into the template	None. It works straight away.

> **Rule of thumb**
> If a value is part of the contract itself, keep it on the contract (a standard or custom field) so it fills in automatically and never appears under Fill In. Use saved versions for the details you would otherwise retype from one document to the next.

9. Frequently asked questions

I don't see any versions.

If the bar says *No saved versions yet*, nobody has saved values for this template yet. Save your first one as described in section 4. If you see no Fill In section at all, the template has no fields to type: everything comes from Company Settings or the contract.

The bar says "Saved versions couldn't be loaded".

Deep Space couldn't reach the saved versions, usually because of a connection problem. You can still fill in and generate the document. Close and reopen the dialog to try again. If it keeps happening, contact Deep Space support.

I clicked a version but one field stayed empty.

That version didn't hold a value for the field. Either it was blank when the version was saved, or the field was added to the template later. Type the value and save a new version.

Will saving a version change the contract?

No. Saved versions only fill the Generate Document form. The contract record, the template and Company Settings are not changed.

Does generating a document always create a new version?

Only when the Fill In values are new. Generating with exactly the same values as an existing version reuses that version. Generating with every Fill In field empty saves nothing.

Can I rename a version?

Not at the moment. Versions are numbered, and the tooltip shows the date, the person who saved it and its values, which is usually enough to pick the right one.

Can I bring back a deleted version?

No. Deleted versions cannot be restored from the dialog. If you still have the values, save them again as a new version.

Does this work for Word (DOCX) templates?

Yes. It works for both standard and Word-based templates, and for both **Download PDF** and **Download DOCX**.

> **Need help?**
> Use **Contact support** in Deep Space and include the template name and the record you were generating for.