DEEP SPACE · CUSTOMER GUIDE

Word Document Templates

How to bring your own Word contracts and documents into Deep Space, tag them with variables, and generate finished documents from your live project data.

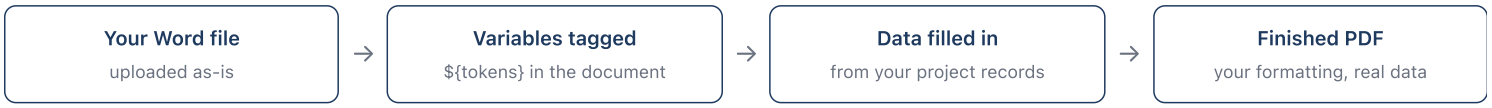
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1. How it works

Your Word file is the template. Deep Space stores the `.docx` file you upload exactly as it is — every font, table, header, footer, logo and clause stays untouched. Anywhere you want live data to appear, the document carries a small placeholder called a *variable*, written as `${variable_name}`.

When someone generates a document (for example a Subcontract Agreement from your Subcontract Register), Deep Space takes your Word file, fills every variable with that record's data, and converts the result to a finished PDF. The preview you see on screen is produced by exactly the same process — **what you preview is what you get**.



Where editing happens

Formatting and wording are edited in Microsoft Word (or any Word-compatible editor) on your own computer — download the file, change it, upload it back. The Deep Space workbench handles everything to do with *variables*: previewing, tagging, and testing. There is no in-browser Word editor; Word itself is the editor.

2. Quick start

1. **Upload your Word file**
   Go to **Admin → Document Templates → Upload Word Template** and choose your `.docx`.
2. **Tag the changing parts**
   The workbench opens automatically. Accept the suggested variables, or use Find & Tag to turn any wording into a variable.
3. **Check the preview**
   Switch the preview to **Simulated** to see the document rendered with sample and company data.
4. **Publish**

Click **Publish** when the template is ready for your team to use.

5 **Generate**

Open a record (a subcontract, purchase order, claim…) and choose **Generate Document** — pick your template, review the pre-filled values, and generate the PDF.

3. Uploading a Word template

From **Admin → Document Templates**, click **Upload Word Template** and select your `.docx` file. Two choices matter here:

SETTING	WHAT IT CONTROLS
Category & Type	Where the template is offered (e.g. a *Subcontract Agreement* template appears in the Subcontract Register's document menus) and which record fields fill in automatically when generating.
Title	The name your team sees when choosing a template.

After the upload you land directly in the template workbench with your document rendered in the preview.

4. The template workbench

Opening any Word-based template takes you to a full-page workbench:

AREA	WHAT IT'S FOR
Centre — preview	A PDF of your document, rendered by the same engine that generates final documents. **Template** mode shows the raw `${tokens}`; **Simulated** mode fills them with sample data plus your real Company Settings.
Left — Suggested variables	Values from your Company Settings (company name, ABN, licence, address…) that Deep Space found written as plain text in the document, each with a one-click **Tag**.
Left — Find & Tag	Turn any exact wording in the document into a variable — see Adding variables.
Left — Variables in this template	Every variable currently in the document, marked either *auto-fills* (filled from record data) or *filled in at generate time* (typed in by the person generating).
Left — Workspace variables	Variables your workspace defines for itself — see Workspace variables.
Top bar	**Download DOCX** (get the current Word file), **Replace file** (upload an edited version), **Publish**.

5. Adding variables

There are three ways to put variables into a template. Most customers only ever need the first two — no special syntax required.

A. Accept the suggestions (zero typing)

If your document contains your own company details written out in full — your company name, ABN, contractor licence, address, phone — Deep Space recognises them and lists each one under **Suggested variables**. Click **Tag** and every occurrence in the document becomes the matching variable.

B. Find & Tag (copy, pick, click)

1. Copy a piece of text exactly as it appears in the document — a client name, a payment term like *"30 days"*, a date.
2. Paste it into the **Find & Tag** box.
3. Pick the variable it should become from the drop-down list.
4. Click **Tag every occurrence**.

Deep Space edits the Word file itself — the text is replaced with the variable, the surrounding formatting is preserved, and the preview refreshes so you can see the result immediately. Download the file afterwards and you'll see the `${token}` sitting right there in Word.

C. Type variables directly in Word

Once you're familiar with the variable names, you can simply type them in Word before uploading: write `${subcontractor_name}` wherever the subcontractor's name should appear. Variable names use letters, numbers and underscores. Two safety nets apply:

- Variables are recognised even if Word has split the text into differently-formatted pieces behind the scenes.
- A name Deep Space doesn't recognise isn't an error — it simply becomes a field the user fills in manually when generating.

Starting from a blank contract?

If your document has empty spaces rather than example values (a blank legal template, for instance), the suggestion tools have nothing to find. Either type the variables into the blanks in Word, or first fill each blank with a distinctive placeholder (e.g. *SUBCONTRACTOR-NAME-HERE*) and use Find & Tag on those.

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6. Workspace variables

Beyond the built-in variables, your workspace can define its own under the `custom.` prefix — from **+ New variable** in the workbench. They work in every template immediately; no involvement from Deep Space is needed.

KIND	BEHAVIOUR	EXAMPLE
Constant	Always fills with a fixed value you set once.	`${custom.company_slogan}` → "Building Excellence Since 1998"
Record field	Pulls a named field from the record the document is generated from.	`${custom.site_supervisor}` → the record's `site_contact` field
Prompt	Asks the person generating the document to type a value (with an optional default).	`${custom.special_conditions}` → typed at generate time

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7. Repeating table rows

To print line items — a schedule of values, purchase order lines — add **one row** to a Word table using `${item.*}` variables. When a document is generated, that row is repeated once per line of the record, keeping your table's formatting:

NO	DESCRIPTION	CODE	QTY	UNIT	RATE	AMOUNT
`${item.no}`	`${item.description}`	`${item.code}`	`${item.qty}`	`${item.unit}`	`${item.rate}`	`${item.amount}`

- Generated from a **subcontract**, rows come from its Schedule of Values; from a **purchase order**, from its order lines.
- In the workbench preview the row template stays visible so you can check its formatting.

- You don't need every column — use only the `${item.*}` fields your table needs.

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8. Editing and updating a template

1. **Download**
   In the workbench, click **Download DOCX**. You get the current Word file, variables included.
2. **Edit in Word**
   Change anything — wording, fonts, tables, logos, page layout. Add or move variables as ordinary text.
3. **Replace**
   Click **Replace file** and upload your edited version. The preview and variable list refresh immediately.

Draft vs Published. Tagging and file replacement are available while a template is a **Draft**. Once **Published**, the version is locked so documents already being generated from it can't change under your team's feet. To amend a published template, use **Clone & Edit** — it creates a new draft version; publish it when ready.

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9. Generating documents

From a record's **Generate Document** (or when sending documents from a register), choose your template. Then:

- **Auto-filled values** — variables that map to the record, your Company Settings or project settings are pre-filled. You can override any of them for this one document; the template is not affected.
- **Manual fields** — unrecognised variables and *Prompt*-type workspace variables appear as input fields.
- **Live preview** — turn on **Show preview** to watch the rendered PDF update as you type (it refreshes about a second after you stop).
- **Output** — generate the finished **PDF**, or download the filled-in **DOCX** if you need the Word version.

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10. What Deep Space does — and doesn't

This section is the plain-language contract for how Word templates behave in Deep Space.

✓ Deep Space will

- Store the exact Word file you upload, unchanged, and give it back to you on request at any time.
- Preserve your formatting end to end — fonts, styles, tables (including nested tables), images, headers and footers, page setup.
- Fill variables wherever they appear: body text, tables, headers and footers.
- Recognise variables even when Word has fragmented the text internally.
- Render previews and final documents through one and the same pipeline, so the preview is faithful.
- Expand a `${item.*}` table row once per line item of the source record.
- Treat unknown variable names as manual fill-in fields rather than failing or printing blanks silently.
- Keep every published version; new versions are explicit (Clone & Edit → Publish).

✕ Deep Space will not

- Change your document's wording, layout or formatting on its own — only tagged variables are replaced.
- Offer in-browser Word editing — formatting changes are made in Word and uploaded via **Replace file**.
- Invent data: a variable with no value at generate time is presented for manual entry, and anything left unresolved remains visibly in `${token}` form rather than disappearing.
- Alter a Published version — amendments always go through a new draft version.

A note on fonts

PDF conversion supports all common document fonts (Calibri, Arial, Times New Roman, Cambria and similar). If your template uses a rare or licensed font that isn't available to the converter, a closest-match substitute is used in the PDF — check the Simulated preview, which shows you the true output. The Word file itself always keeps your original fonts.

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11. Variable quick reference

The workbench's variable drop-downs always carry the complete, current list for your workspace. The most commonly used ones:

VARIABLE	FILLS WITH
`${principal_contractor_name}`	Your company name (Company Settings)
`${company_abn}` / `${company_address}` / `${company_phone}` / `${company_email}`	Your company details (Company Settings)
`${contractor_licence}`	Your contractor licence number
`${project_name}` / `${project_number}` / `${site_address}`	Project details
`${subcontractor_name}` / `${subcontractor_abn}` / `${subcontractor_address}`	The subcontractor on the record
`${sc_number}` / `${subcontract_sum}` / `${subcontract_sum_words}`	Subcontract number and value (in figures and words)
`${contract_date}` / `${start_date}` / `${practical_completion_date}`	Key dates from the record
`${payment_terms}` / `${default_retention_percent}` / `${liquidated_damages}` / `${defects_liability_period}`	Commercial terms from the record
`${item.no}` `${item.description}` `${item.code}` `${item.qty}` `${item.unit}` `${item.rate}` `${item.amount}`	Line-item fields inside a repeating table row
`${custom.…}`	Your workspace's own variables (section 6)

12. FAQ & troubleshooting

QUESTION	ANSWER
The preview shows `${something}` instead of a value.	In **Template** mode that's expected — switch to **Simulated**. In a generated document it means the variable had no value: check the field in the generate form, or the record itself.
My suggested variables list is empty.	Suggestions appear only when your Company Settings values are written as plain text in the document. A blank template has nothing to match — use Find & Tag or type variables in Word.
Find & Tag says the text wasn't found.	The search is exact. Copy the text straight from the document, including punctuation and spacing.
I can't tag — the tools are greyed out.	The template is Published (locked). Use **Clone & Edit** to create a new draft version.
I typed a variable but it isn't in the "auto-fills" list.	The name isn't one of the registered variables for this template's category. It will still work — as a manual fill-in field at generate time. Check the drop-down in Find & Tag for the exact registered names.
My table shows the `${item.*}` row instead of real lines.	In the workbench that's by design (so you can check its formatting). In a generated document it means the record type doesn't supply line items to this template — contact support if you expected data here.
Who can manage templates?	Workspace administrators, under **Admin → Document Templates**. Generating documents is available to your team from the relevant registers.