



Templates: Build Your Letterhead Once, Spawn Every Document From It

The .dotx file that turns styles and Quick Parts into a reusable starting point

You have a letter to write, so you open last month's letter to a different client, delete the body, change the address, and start typing. Or worse, you rebuild the letterhead from scratch. Both are the slow way, and both invite mistakes: the old client's name survives in a paragraph you missed, the margins drift, the font is not quite right.

A template fixes this. A template, a .dotx file, is a master document you create new documents from. It holds your styles, your letterhead, your margins, and your standard boilerplate. When you open it, Word does not open the master; it hands you a fresh copy to work in. The master stays pristine, and every document you start from it begins correct.

.docx vs .dotx

A .docx is a document. A .dotx is a template. The one difference that matters: double-click a .docx and you edit that file; double-click a .dotx and Word creates a new untitled document based on it, leaving the template untouched. That single behavior is the whole point. Your letterhead can never be accidentally overwritten, because you are never actually editing it.

What belongs in a template

Everything you want every new document to start with:

- Your styles (from the Styles tip): heading, body, signature block.
- Page setup: margins, paper size, line spacing.
- Letterhead: firm name and address in the header, page numbers in the footer.
- Standard boilerplate: the parts that never change.
- Your Quick Parts, which travel with the template if saved to it.

Make one

Build a document until it looks exactly like the starting point you want. Then: File > Save As, and choose "Word Template (*.dotx)" in the file-type dropdown. Word jumps you to the Custom Office Templates folder; keep it there so Word can find it later. Name it something obvious like "Firm Letterhead" or "Pleading Paper" and save.

Use one

File > New > Personal. Your saved templates appear as tiles. Click one and Word opens a fresh copy, ready to fill in. That is the whole workflow. (Or just double-click the .dotx in File Explorer; same result, a new copy.)

Edit the master later

Here is the one catch. Because opening a template creates a copy, you cannot edit the master by opening it normally. To change the template itself: File > Open, browse to the .dotx, and open it directly. Make your change and save. Every future document built from it inherits the change; documents already created do not.

Why this matters for a legal practice

Pleading paper, engagement letters, client letters, fee agreements: each is a template waiting to exist. Build the pleading caption once, with the court formatting correct, and every new pleading starts right instead of being copied from a prior case that drags the prior case's caption along with it. This is where the last two tips pay off: your styles and your Quick Parts live inside the template, so a new document arrives already formatted and already stocked with your standard language.

The trap

Do not "reuse" an old client document as your template. It carries that client's data, that matter's tracked changes, and metadata you do not want traveling into a new file. Start from a real template that contains nothing client-specific. Metadata is its own tip, and it matters more than most lawyers think.

Using AI to help with this. Describe your ideal starting document and get a build plan: "I want a Word letterhead template with my firm name centered in the header, address in the footer, one-inch margins, and a signature-block style. Walk me through building it and saving it as a .dotx." Then build it once and start every letter from it.