

Make templates for your team

From the SourceLace manual: How to turn an agent that works well into a template other people in your organization can use, and how admins keep the template library tidy. For building the agent itself, start with Build your first agent.

SourceLace version 0.1.0 · Made October 7, 2026

The latest version is at <https://sourcelace.onrender.com/docs>

Make templates for your team

How to turn an agent that works well into a template other people in your organization can use, and how admins keep the template library tidy. For building the agent itself, start with [Build your first agent](#).

Who this is for

- **People who build agents** and want colleagues to reuse them. Anyone who may create agents can save a template.
- **Admins** who decide which templates people see.

Templates you save are shared with everyone in your organization, and only your organization. SourceLace's own built-in templates are listed next to them on **Agents → Templates**.

What makes a good template

One job. "Nudge reps about quiet deals" is a template. "Run sales operations" is not. If you find yourself writing "and also", make two templates.

A clear outcome. Someone reading the card should know what they will get: "one email draft per rep, listing their quiet deals", or "a one-page document of open incidents by priority". Put this in the agent's **Description** before you save; it becomes the template's summary.

Safe defaults. The person using your template may be new to agents. Make the safe choice the default:

- drafts, documents and summaries rather than record changes;
- record changes and Slack or Teams posts set to **I approve each change** or **I approve each message**;
- the fewest systems, fields and channels that do the job;
- modest limits: steps, records and credits per run, and runs per day.

Works for others. Your colleagues have their own access and their own data. The template must not depend on your records, your name or your mailbox. See [Write instructions that work for other people](#).

Save as template

1. Build the agent and get it working with dry runs and a few real runs. See [Build your first agent](#).
2. Check its **Name** and **Description**. They become the template's name and summary, so make them clear to someone else. Rename the agent if its name only makes sense to you (press **Edit**, change it, then **Save as a new version**).
3. On the agent's page, on the **Setup** tab under **More**, press **Save as template**. The [template editor](#) opens, filled in from your agent. Nothing is saved yet.
4. Choose the category, say who it is for, add questions for the numbers people will want to change, and widen the slots if it works with other systems too (see below). Press **Try it** to see

the agent it makes, then **Save template**.

What the template keeps:

- the instructions, with each of your systems replaced by a slot (see [How system slots work](#));
- the actions with their approval settings, the fields they may set and the channels they may post in;
- when it runs: the schedule, the calendar words and hours, or the event search;
- the limits.

What it does not keep: you as owner, your results project, your failure alert setting, the skill to follow, and any runs or approvals. A person who uses the template makes their own agent, owned by them, using their own access.

On the **Templates** page, your template shows the category you chose, "made in your organization" and its version. If you added questions, the wizard asks them, and people can change their answers later with **Change answers** on their agent.

A template is a copy. Changing or deleting your agent later does not change the template, and changing the template does not change agents already made from it.

How system slots work

When you save, each system your agent reads becomes a slot in the wizard's **Systems** step.

- The slot is named after the kind of system, such as *Salesforce* or *Microsoft 365*.
- At first the slot only accepts that same kind. In the editor, under **Systems that fit**, press **Any CRM** (or Any mailbox, and so on) to let people with HubSpot or Dynamics 365 use it too; then write the instructions so they work for each, and give a record change's object and fields for each system.
- Slots start as required; turn off **Required** for one people may leave empty.
- Where your instructions mention a system by its source id (such as `salesforce:prod`), that id is replaced by the slot, so the agent made from the template uses the other person's choice.
- The card shows **Your systems fit** only to people who can use a source of every kind the template needs.

Tip: before saving, untick systems the agent does not really need. Each one becomes a required slot for everyone.

Write instructions that work for other people

Instructions that work for you can break for a colleague. Before you save, read them as someone else would.

- **Say "my" and "me", not your name.** The agent always acts for its owner. "Deals I own" works for everyone; "Deals Priya owns" only for Priya's team.
- **Refer to systems by their kind, not your label.** Write "in Salesforce", not "in Corvanta Salesforce (EMEA)". Only source ids are swapped for slots; labels are not.
- **Turn the numbers people will want to change into questions.** Add a question such as "Days without activity" named `stale_days`, and write `{stale_days}` in the instructions where the

number goes.

- **Avoid record ids, names of specific accounts and private lists** unless every user should get the same ones.
- **Name objects and fields as the system calls them** (such as `Opportunity` and `LastActivityDate`), and say what to do if a field is empty.
- **Keep the "do not" lines.** They matter even more for people who did not write them.
- **Curly brackets are for questions and slots.** `{stale_days}` is replaced by an answer and `{source.crm}` by the chosen system. The editor flags any `{word}` that is not a question or a slot, so you can add the question or reword it.

Test with someone else's account

Your own dry runs prove the agent works for you. Before you tell your team, ask a colleague to test it:

1. They open **Agents → Templates**, find your template (it says "made in your organization") and press **Use template**.
2. They choose their own systems, keep or change the schedule, and press **Create agent**. The agent is theirs and starts as a draft.
3. They press **Dry run** and open the run.
4. Together, check the **Summary**, the **Changes** cards and the **Steps**. Look for 0 rows, *Refused* or *Failed* steps, and drafts that mention you instead of them.
5. Fix the instructions on your own agent, then save a new template (see below). Ask them to delete their test agent and try again.

Pick a tester with different access from yours, for example a rep rather than a manager. That shows whether the template still makes sense when someone sees fewer records.

Change or remove a template

On **Agents → Templates**, press **Edit** on your template. Each save makes a new version; agents already made from it keep theirs. The person who made a template and admins can edit it. (**Save as template** on an agent always makes a new template.)

Deleting asks you to confirm, and says "Agents made from it keep working". The person who saved a template and admins can delete it.

Names and categories

- **Name:** what it does, in a few words, starting with the outcome: "Stale deal nudges", "Weekly open incidents report". Avoid a name a built-in template already uses, or people will not know which one to pick.
- **Description (the summary):** one or two sentences: what it reads, what it produces, when it runs, and "Drafts only: nothing is sent" if that is true.
- **Category:** the team it is for, the same categories as the SourceLace templates, or **Other**.

- **Questions:** settings people fill in on the wizard's second step, as the SourceLace templates have. See [Template editor](#).

For admins: hide templates

Some templates may not suit your organization. On **Agents → Templates**, admins see **Hide** on each template, SourceLace's and your organization's own.

- Hidden templates disappear for everyone else. Admins still see them, marked "hidden from everyone but admins".
- Press **Show to everyone** to bring one back.
- Agents already made from a hidden template keep working.

Agents → Settings also decides **Who can create agents**: everyone, people in some groups, or admins only. Only people who may create agents can use templates or save them.

For admins: keep the library useful

- Review new templates made in your organization now and then. Delete duplicates and ones nobody uses.
- Check that saved templates ask for approval on record changes and posts, unless you mean otherwise.
- If a template needs a system people do not have, add the source on **Manage sources** or delete the template.
- The **Agents → Overview** page shows every agent, its owner, failures and credits. If several agents made from one template fail often, its instructions probably need work.
- Templates SourceLace publishes appear next to your own, marked as SourceLace's, and can be hidden like any other (see [SourceLace library](#)).