

Scenario templates

What is a template?

Templates are predefined [scenarios](#) that you can expand and customize to create new scenarios. You can then [share](#) these with friends and colleagues.

Benefits of templates

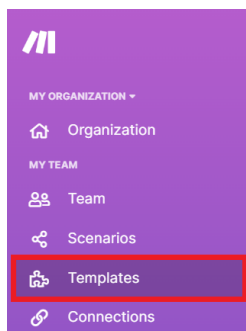
- Creating your scenarios becomes much easier. Instead of starting each new scenario from scratch, you can use a template as a foundation to expand upon.
- Share your templates with anyone.
- Save your templates for future use.

Who can create templates?

Anyone with a **Teams** plan or higher can create templates. See the available [subscription plans](#).

Using templates

You can find the **Templates** tab under your **Team** in the left-hand menu.



Search for templates using the search bar in the top-right corner.

Template types

Team templates

Team templates are those you and your team create. From the team templates screen you can create, customize, save, and share your templates with others.



NOTICE

Team templates can be *private* or *published*.

- *Private*
Visible only to the team. Cannot be shared.
- *Published*
Visible to anyone with the shareable link.

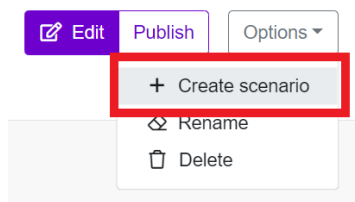
Public templates

A collection of templates created by Make and our partners that demonstrate many common integrations. Anyone can use them to create their own scenarios.

You can [send your published templates for approval](#) to make them available in the public templates library.

Creating a scenario from a template

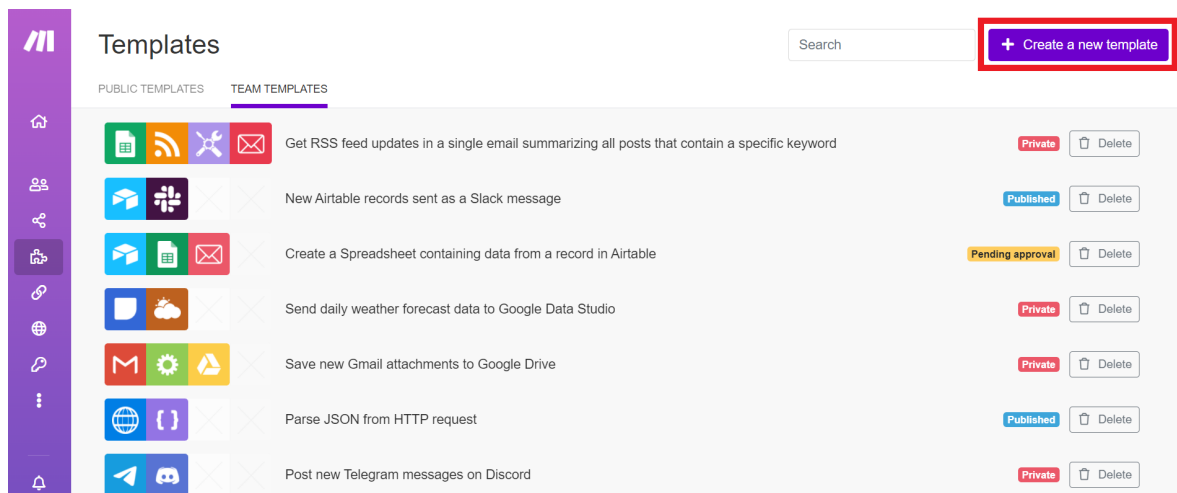
1. Select the template you want to use.
2. Click **Options**.
3. Click **Create scenario**.



4. Choose which [organization](#) you want to create your scenario for.
 5. Click **Save**.
- You are now ready to edit your scenario.

Creating templates

1. Click **Templates** in the left-hand menu.
2. Click **Create a new template**.



The scenario editor appears. Use the editor to create templates the same way you create regular scenarios. See our guide on [editing a scenario](#) to learn more.

Renaming templates

When you create a new template, Make names it “New Template” by default.

Edit the name by clicking the title displayed at the top of the page, or follow the steps below:

1. Click **Options** in the top-right corner.
2. Click **Rename**.



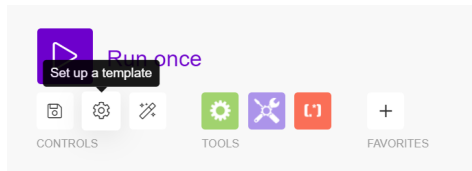
NOTE

You can only rename *private* templates.

Adding a description

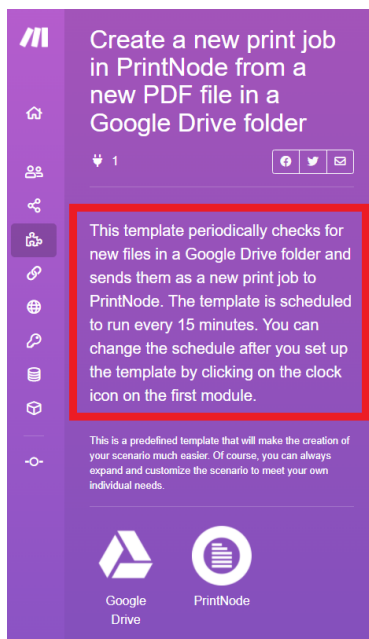
You can include a description of your template to inform others of its functionality.

1. Click the **gear icon** in the **Controls** panel below your template.



2. Add your description in the box provided (Max. 240 characters).
3. Click **Save**.

Your description appears in the template information panel.



Editing templates

See the [scenario editor guide](#) for more detail.



NOTICE

You can only edit your *private* templates.

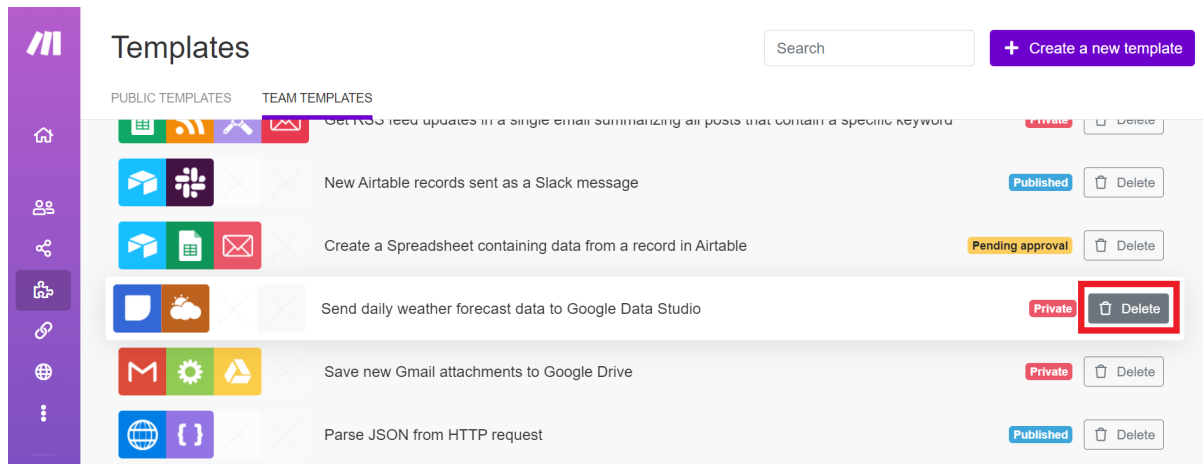
You cannot edit any *published* templates.

Templates cannot start with a [webhook](#).

Deleting templates

You can delete any of your *private* or *published* templates.

- From your template list, click **Delete** to the right of any template.



- From a template, click **Options** in the top-right corner, then click **Delete**.

Sharing templates

Publishing

To share your template with others you must first 'publish' it.

To publish a template:

- Choose which *private* template you want to share.
- Click **Publish** in the top right corner.



NOTICE

You cannot edit a *published* template, but you can still access and edit the *private* version.

If you re-edit and wish to publish again, follow the steps above. The new *published* template overwrites the previous one.

Share a public link

Once you publish your template you can share it with others.

Click **Share public link** in the top-right corner to copy the link to your clipboard.



NOTE

Template recipients cannot change or clone the template.

Requesting approval

You can send your *published* templates for approval to make them available in the public templates library.

- Click **Request approval** in the top-right corner.

The button will now read “Approval pending”.

A Make administrator reviews your template for public use. After approval, Make adds your template to the public templates library.