

DESK

The Desk handbook

Clients, matters, your queues and work streams, and the reports your team runs.

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Set up Desk for your practice

Updated 14 October 2026 · unforged.ai/help/desk/set-up-desk-for-your-practice

Desk is ready to use as soon as it's added, and a short checklist helps you get your team, your people and your documents in. A template then gives you work streams and words that suit your practice.

Before you start

An owner of your organisation adds Desk, and everyone who'll use it needs to be a member of your organisation first. See [Set up your organisation and invite your team](#).

1 Add Desk

From the workbench, open Desk and you'll see **Add desk** with the price. Choose who gets the **Second included seat**, tick anyone who needs an extra seat, check the monthly total and press the **Add desk** button.

2 Work through the first-run checklist

Desk opens on **First run** with four steps: **Seats given out**, **Bring your people in**, **Choose where documents come from** and **Check the outcomes and queue rules**. Each has a link that takes you to the right page, and an admin can press **Skip** on any you don't need yet.

3 Pick a template

Go to **Settings**, then **Template and territory**. Choose **Where you work** and **What you do** (for example **England and Wales** and **Solicitors**), tick the work streams you want and press **Preview**.

4 Check the preview and set it up

The preview says which work streams and outcomes we'll add and how new matters will be numbered. If that looks right, press **Set it up**, or **Cancel** to change your choices.

5 Use your own words

Under **Settings**, then **Organisation**, you can change what Desk calls the people you act for, the work you do for them and the person who looks after it, and set the **Number format** and **Next number**. Press **Save** when you're done.

If your tabs say something different

These guides use the words Clients and Matters. Your organisation may call them something else, such as customers and cases, and the tabs and buttons follow whatever you've chosen.

You can come back to the checklist at any time from **Settings**, then **Setup**.

If something goes wrong

Desk asks you to get an owner to add it, instead of showing a price.

Only an owner of your organisation can add Desk. Ask them to open it from the workbench, or write to us at support@unforged.ai if nobody can.

The template fields are greyed out.

Only an admin in Desk can change the template and your words. Ask your Desk super admin to make you an admin, or to make the change for you.

Add a client

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Every matter belongs to a client, so adding them is usually the first thing you'll do for new work. A client can be a person or a business.

1 Open Clients

Choose **Clients** along the top and press **Add client**. If your organisation uses its own word, the tab and the button use it too, so you might see **Customers** and **Add customer**.

2 Say who they are

Pick **A person** or **A business**. Then enter their **Full name**, or the **Business name** and, if you have it, the **Company number**.

3 Add the details you have

Everything else is optional: **Email**, **Phone**, an address and a **Reference in your other system** if you keep one in your case management software. For a person, leave **Your reference** blank and we'll number them for you.

4 Save the client

Press **Add client**. You'll land on their page, where you can start a matter straight away with **New matter**.

5 Add the people at a business

For a business, open the **People** tab and use **Add a person** to pick someone already in Desk or add someone new, with their role. Tick **Signs for** the business if they can sign on its behalf.

Keeping a client's record up to date

The **Details** tab is where you change their name, contact details and address, then press **Save details**. On the same tab, the **AML record** lets you note whether ID has been checked, add a link to the check, record the source of funds and set a risk rating, then press **Save AML record**.

The **Overview** tab shows their open matters and everything that has happened, and you can find any client again with the search at the top of **Clients**.

If something goes wrong

Your reference won't save.

A reference can only use letters, numbers, dots, dashes and underscores. Take out any spaces or other symbols and press **Add client** again.

Open a matter

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A matter is one piece of work for a client, such as a purchase or a lease renewal. It sits in a work stream and moves through that stream's stages until it's done.

Before you start

You need the client in Desk and at least one work stream. If **Work stream** has nothing to choose, an admin can add one under **Settings**, then **Work streams**.

1 Start a new matter

On the client's page, press **New matter**. You can also press **New matter** on **Home** or on **Queues**, and then choose the client from the list.

2 Choose the work stream

Pick the **Work stream** the matter belongs to. If you only have one, it's already chosen for you.

3 Give it a title

Enter a **Title** that says what it is, like "Lease renewal, Harper & Lowe". **Type** and **Reference in your other system** are optional.

4 Open it

Press **Open matter**. If we already act for someone with a similar name or company number, you'll see **Have a look before you open it** with who they are, and you can check them before pressing **Open it anyway**.

5 Keep it moving

On the matter's page, use **Stage** to move it on, add people under **On this matter**, and set key dates under **Dates**. Tick items off the **Checklist** as you go, and use **Change owner** to hand it to someone else.

When a second person needs to sign off

Some stages need a second person to agree before the matter moves on. The matter then shows **Waiting for a second person to sign off**, and anyone other than the matter's owner can press **Sign off**, or add a note and press **Send back**.

Your organisation may use its own words for clients, matters and owners, and the page follows them.

If something goes wrong

The matter won't move to the next stage.

The stage may need its checklist finished first, or be waiting for a second person to sign off. Finish the checklist or ask a colleague to sign it off, then try **Stage** again.

Work through your queue

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Your queue holds the documents waiting for you to decide on. Each one shows the signature on the document beside the ones you have on file, so you can record what happens next.

1 Start from Home

Home tells you how much is waiting on you. Press **Start with the oldest** to go straight to it, or **Open my queue** under **Waiting on you** to see the lot.

2 Pick the view you want

On the left you'll find **My queue**, **Everyone's**, **Not assigned**, **Unmatched**, **Waiting on customer**, **Escalated** and **Closed**, each with a count. Use **Came in by** to show only uploads or only email.

3 Look at the document

Choose a document from the list. You'll see the signature on the document next to a saved one for that person, with the result and the reasons behind it, and **Open in full** if you want the whole page.

4 Choose what happens next

Under **What happens next**, pick an outcome such as **Accept** or **Ask for a new signature**, and add a **Note** if it needs one. Then press the button below it, which says what it will do, such as **Accept and close**.

5 Take it on or move on

Press **Assign to me** to make a document yours. If a check didn't run, press **Retry the check**.

Working faster with the keyboard

Press J and K to move down and up the list, a number key to pick the outcome with that number, and Enter to record it. A assigns the document to you and O opens it in full.

For what each result means, see [Read a result](#).

If something goes wrong

Desk says a note is needed.

Some outcomes always need a note, and **Accept** needs one when a check needs a look. Write a line in **Note** and press the button again.

Desk says someone else changed the document.

A colleague got to it first, and nothing you did was saved. Reload the page to see where it stands now.

Add documents to a matter

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Signed documents can go straight onto the matter they belong to. Desk checks the signatures as they arrive and lists each document on the matter.

1 Open the matter

Find it from the client's page or under **Matters** along the top, and open it.

2 Add the files

Press **Add documents** and choose your files, or simply drag them onto the page and let go when you see **Drop to check**. You can add PDF, JPG, PNG, TIFF or ZIP files, up to 25 MB each and 50 at a time.

3 Watch them come in

Uploads opens in the corner and shows how each file is getting on. You can close it whenever you like.

4 See them on the matter

Each document appears under **Documents** with who signs where. If one needs a look, it shows at the top of the matter so you can record an outcome there and then.

Adding documents that aren't for one matter

Press **Add documents** on **Home** to reach a page where you can drop files or press **Choose files** or **Choose a folder**. If a file's name includes the person's reference, such as CUST-203_mandate.pdf, we match it to them straight away.

If your team has an email address for Desk, that page shows it so you can email documents in instead.

Recently added lists what came in and what happened to each one, with **Match it** beside any we couldn't place.

If something goes wrong

Some files weren't sent.

You can add at most 50 files at a time. Add the rest in a second batch.

There's no **Add documents** button on the matter.

Closed matters don't take new documents. Open a new matter for the work, or ask an admin if Desk is showing as read-only.

Match an unmatched document to a person

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When we can't tell who signed a document, it waits in **Unmatched** until someone says who it is. Once you do, the signature is checked against that person's file.

1 Open Unmatched

In your queue, choose **Unmatched**. You can also press **Who is this?** beside a document on **Home**, or **Match it** under **Recently added** on the **Add documents** page.

2 Look at the document

Pick a document on the left. The page shows the document itself, its file name and, if it came by email, who sent it.

3 Choose who signed it

Under **Who signed this?**, look at the suggestions under **Could be** and press **Choose** beside the right person. If they aren't suggested, search by name, reference or email and press **Choose**.

4 Add someone new if you need to

If they aren't in Desk yet, press **Add a new person**, fill in their **Full name** and **Your reference**, then press **Add person**. You'll come back to **Unmatched** with the document matched.

5 Set aside anything that isn't signed

If the file isn't a signed document at all, such as a covering letter, press **It isn't a signed document** and it leaves the list.

Getting fewer unmatched documents

Put the person's reference in each file name, or ask clients to put it in the email subject, and we'll match most documents without your help. An admin can also turn on **Suggest who a document is for** under **Settings**, then **Queue rules**, and you always confirm before anything is checked.

If something goes wrong

The person you want isn't in the list.

Use **Search everyone** to look beyond the first names shown. If they still aren't there, press **Add a new person**.

Run a report

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Reports shows what came in over a period, what the checks found and how much each reviewer has decided. Admins can also download the underlying records.

1 Open Reports

Choose **Reports** along the top.

2 Choose the period

Pick from **Last 7 days**, **Last 30 days**, **Last 6 weeks** or **Last quarter**, or choose **Between two dates** and set the from and to dates. The page updates as soon as you choose.

3 Narrow it by how documents came in

Use the second list to show **Uploads and email**, just **Uploads** or just **Email**.

4 Read the numbers

Across the top you'll see **Documents checked**, **Sent to a person**, **Decided** and **Typical time to decide**. Below them, **What the checks found each week** charts the results and **Reviewers** shows what each person has open and has decided.

5 Download what you need

Under **Downloads**, press **Export** for a spreadsheet of every document or everyone in Desk, or **Build** for an audit pack of closed items. We'll email you when it's ready, and a **Download** link appears beside it for a limited time.

If something goes wrong

Downloads isn't on the page.

Only admins in Desk can download records. Ask your Desk super admin to make you an admin, or to run the download for you.

A download says it failed or expired.

Press **Export** or **Build** again to make a fresh one. If it fails again, write to us at support@unforged.ai.

Set up your queues

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Queue rules decide which documents need a person and who gets them. They start with sensible settings, so you only need to change what doesn't suit you.

Before you start

You need to be an admin in Desk to change queue rules. Everyone else can see them but not change them.

1 Open Queue rules

Go to **Settings**, then **Queue rules**.

2 Decide what happens after a check

Under **What happens after a check**, choose for each result whether it should **Close on its own** or **Send to a person**. Out of the box, anything that needs a look, failed or couldn't be read goes to a person.

3 Choose who gets new documents

Under **Assign new items**, share them out in turn among people marked available, send them all **To one person**, or **Leave unassigned** so people pick them up themselves.

4 Set the timing

Choose how many hours a document can wait before Desk nudges, and after how many days a document waiting on the customer closes.

5 Save

Press **Save**. Your changes apply to documents that come in from now on.

Queues inside a work stream

Each work stream can also have its own named queues, such as one for a single stage or for matters with a date coming up. You'll find them under **Queues in this work stream** when you open the work stream in **Settings**. See [Create a work stream](#).

Anyone can mark themselves **Away** under **Settings**, then **Team and seats**, so round-robin passes them by while they're out.

If something goes wrong

Documents closed on their own when we wanted to see them.

Switch that result to **Send to a person** and press **Save**. Documents that already closed stay closed, so open them from **Closed** in your queue if you need to look again.

Create a work stream

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A work stream is one kind of work your team does, such as residential conveyancing, laid out as stages from start to finish. Every matter sits in one.

Before you start

You need to be an admin in Desk. If you picked a template, you may already have the work streams you need.

1 Add the work stream

Go to **Settings**, then **Work streams**. Type a name into **Name of a new work stream** and press **Add work stream**.

2 Choose the team and where new work goes

Add people to the **Team**, or leave it as everyone with a seat. Under **New work goes to**, choose **Shared out in turn**, **Whoever picks it up** or the client's owner.

3 Lay out the stages

Name each stage, choose **Who works it** and give it a time limit in days if you want one. Press **Add a stage** for more, and drag stages into order.

4 Fine-tune each stage

Open a stage's options to switch on **Check signatures when documents arrive**, **A second person signs off**, or **Can't move on until the checklist is done**. **What happens here** says whether the matter is being worked on, waiting on someone else or closed.

5 Add the documents you expect and a checklist

Under **Documents we expect**, press **Add a document type** and say who signs, where and how many. Under **Checklist**, add the things to tick off on every matter, like "Searches back".

6 Save it

Press **Save changes**. The work stream is now there to choose when you open a matter.

Changing or retiring a work stream

Open it from **Work streams** to change anything, then press **Save changes**. A stage that still has open matters can't be removed, and every work stream keeps at least two stages.

When you stop doing a kind of work, press **Archive**. You can press **Bring it back** later if you need it again.

Choose the outcomes your team records

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Outcomes are the choices your team has when deciding on a document. Desk starts you with four: **Accept**, **Ask for a new signature**, **Reject** and **Escalate to manager**.

Before you start

You need to be an admin in Desk to change outcomes. Everyone else sees them as a list.

1 Open Outcomes

Go to **Settings**, then **Outcomes**.

2 Name each outcome

Change the **Name** to the words your team uses, like "Signature confirmed".

3 Choose what it does

Under **Then**, pick whether it closes the document as accepted, closes it as rejected, waits on the customer, or passes it to your super admin.

4 Decide when a note is needed

Under **Note**, choose **Never**, **Optional**, **When a check needs a look** or **Always**. Pick a **Colour** too, so outcomes are easy to tell apart.

5 Add and arrange them

Press **Add an outcome** for a new one, use the arrows to change the order and the cross to remove one. Their order sets the number key each one has in the queue.

6 Save

Press **Save changes**, or **Cancel** to go back to how they were.

If something goes wrong

Desk won't let you remove an outcome.

You need to keep at least one outcome that closes a document as accepted. Add or change another one to do that first, then remove the one you don't want.

Add an outcome is greyed out.

You can have up to 12 outcomes. Remove one you rarely use, then add the new one.

Add seats for your team

Updated 14 October 2026 · unforged.ai/help/desk/add-seats-for-your-team

Everyone who works in Desk needs a seat. Two come with Desk, and you can give out as many extra seats as you need.

Before you start

Only your Desk super admin can give out seats, and seats go to members of your organisation. To invite someone new, see [Set up your organisation and invite your team](#).

1 Open Team and seats

Go to **Settings**, then **Team and seats**. You'll see everyone with a seat, their role and whether they're available for new work.

2 Choose who gets a seat

Under **Give someone a seat**, find them in **Person**. If the seat is an extra one, the hint shows what it adds to your monthly bill.

3 Choose their role

Pick **Reviewer** for someone who works their queue and Everyone's, or **Admin** for someone who also changes outcomes and rules and sees every queue.

4 Give the seat

Press **Give a seat**. They can use Desk straight away.

5 Change things later

Change someone's role from the list, or press **Remove** to take their seat back. To pass your own role on, press **Hand over**, choose who takes it and press **Hand over** again.

When someone is away

Anyone can press **Available** beside their own name to mark themselves **Away**, so new documents aren't shared out to them. Press it again when they're back.

If something goes wrong

The person you want isn't in the list.

They need to be a member of your organisation first. Invite them, wait for them to join, then give them a seat.

A colleague sees "You don't have a desk seat".

Give them a seat here. The page they see names you as the person to ask.

Send email from your own domain

Updated 14 October 2026 · unforged.ai/help/desk/send-email-from-your-own-domain

With your own domain in Desk, clients can send documents to an address on it and the emails we send them come from your firm's name. It takes a few records added where your domain is managed.

Before you start

You need to be an admin in Desk, and you'll need access to your domain's DNS settings, or someone who looks after them for you.

1 Add your domain

Go to **Settings**, then **Domains and email**. Under **Your domains**, enter your domain, like harperlowe.co.uk, and press **Add domain**.

2 Add the ownership record

Desk lists the records to add, each with its type, name and value, and a **Copy** button. Start with the one marked **Proves you own the domain** and add it in your DNS settings exactly as shown.

3 Check it

Press **Check again**. When the record is found, the domain shows as **Yours**, though it can take a little while for changes to show up.

4 Choose what it's for

Open **Choose what it's for**, switch on **Send email to clients from this domain**, and **Receive documents** too if you'd like documents to arrive on it. Press **Save**.

5 Add the remaining records

After a few minutes more records appear for receiving and sending. Add each one, press **Check again**, and once **Sending** shows **Working**, emails to your clients come from your domain.

Giving clients an address to send to

Under **Addresses**, open **Add an address**. Choose **On your domain** and enter the part before the @, like "conveyancing", or choose **Forwarded from your mailbox** to use an address you already have. Pick a **Work stream** and **Who can send to it**, then press **Add address**.

If something goes wrong

A record still says `Not found yet` or `Wrong value`.

Check the name and value match what Desk shows, using `Copy` to avoid typos, then wait a while and press `Check again`. If it still isn't found after a day, write to us at support@unforged.ai.

The page says your own domains aren't available yet.

Your own domain isn't switched on for your Desk. Write to us at support@unforged.ai and we'll sort it out with you.