

Add a client

Updated 14 October 2026 · unforged.ai/help/desk/add-a-client

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.