

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.