

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.