Let clients follow their matter online

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Clients ring to ask where things are up to. With the portal on, they can sign in and see for themselves: the stage the matter is at, anything you've asked them for, and who to talk to.

Before you start
You need to be an admin in Desk to turn it on. Anyone working on a matter can invite people to it.

1 Turn it on

Go to **Settings**

Under **Packs**, press **Turn on** beside **Client portal**. Read what it costs and press **Agree and turn on**.

If the portal is part of your agreement, there's nothing to agree and the button just says **Turn on**. If it asks for a card, press **Add a card** first.

2 Choose what clients see

Go to **Settings** › **Client portal**

Fill in what helps, then press **Save**:

- **Phone number**, for a client who can't sign in
- **Beside messages**, when they can expect a reply
- **Sign out after**, how long before an idle client is signed out
- **Closed matters stay for**, how long a finished matter stays in view

3 Invite someone from the matter

Go to **Matters**

Open the matter and choose **Client portal**. Under **Not invited yet**, press **Invite** beside the person. If we don't have their email, type it in first.

To invite someone who isn't on the matter, like a client's partner or their mortgage broker, press **Invite someone else** and give their **Name** and **Email**.

4 Ask them for what you need

Ask for something on the matter and pick them under **Who**. It shows under **What we need from you** when they sign in, and they can send each thing back there as a file or a written answer. What they send goes into the matter's documents and ticks the request off.

5 Help someone who can't get in

Under **Following it online**, press **Reset sign-in** beside them. We email them a way back in, and they set up their sign-in again, which helps after a lost phone or a new laptop. Press **Take off** if they should no longer see the matter.

What your client sees

Your client gets an email inviting them, with a link to sign in. The first time, they press **Email me a code**, type in the code we send, and can then set up Face ID, a fingerprint or their PIN for next time.

Each matter shows **Where it's up to**, with its stages ticked off as you go, **What we need from you**, and **Who to talk to**.

Turning it off

Press **Turn off** beside **Client portal**. Everyone loses access straight away, and you can tick the box to email them to let them know. Turn it back on and they can sign in again as before.

If something goes wrong

It says the portal isn't part of your agreement yet.
Write to us at support@unforged.ai and we'll add it.

There's no Client portal in the list down the matter's side.
The portal is off for your firm. Ask your Desk admin to turn it on.