

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**.