

Set up Desk for your practice

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Desk is ready to use as soon as it's added, and a short checklist helps you get your team, your people and your documents in. A template then gives you work streams and words that suit your practice.

Before you start

An owner of your organisation adds Desk, and everyone who'll use it needs to be a member of your organisation first. See [Set up your organisation and invite your team](#).

1 Add Desk

From the workbench, open Desk and you'll see **Add desk** with the price. Choose who gets the **Second included seat**, tick anyone who needs an extra seat, check the monthly total and press the **Add desk** button.

2 Work through the first-run checklist

Desk opens on **First run** with four steps: **Seats given out**, **Bring your people in**, **Choose where documents come from** and **Check the outcomes and queue rules**. Each has a link that takes you to the right page, and an admin can press **Skip** on any you don't need yet.

3 Pick a template

Go to **Settings**, then **Template and territory**. Choose **Where you work** and **What you do** (for example **England and Wales** and **Solicitors**), tick the work streams you want and press **Preview**.

4 Check the preview and set it up

The preview says which work streams and outcomes we'll add and how new matters will be numbered. If that looks right, press **Set it up**, or **Cancel** to change your choices.

5 Use your own words

Under **Settings**, then **Organisation**, you can change what Desk calls the people you act for, the work you do for them and the person who looks after it, and set the **Number format** and **Next number**. Press **Save** when you're done.

If your tabs say something different

These guides use the words Clients and Matters. Your organisation may call them something else, such as customers and cases, and the tabs and buttons follow whatever you've chosen.

You can come back to the checklist at any time from **Settings**, then **Setup**.

If something goes wrong

Desk asks you to get an owner to add it, instead of showing a price.

Only an owner of your organisation can add Desk. Ask them to open it from the workbench, or write to us at support@unforged.ai if nobody can.

The template fields are greyed out.

Only an admin in Desk can change the template and your words. Ask your Desk super admin to make you an admin, or to make the change for you.