

Write a document

Updated 25 October 2026 · unforged.ai/help/desk/write-a-document

You can write letters and other documents for a matter right in Desk, on your letterhead. Everyone working on the matter can edit the draft at the same time, and once it's finished it goes on the matter as a PDF.

Before you start

You need a seat in Desk, and the matter the document is for. Drafts always belong to a matter.

1 Start a document

On the matter, press **Write a document**. You can also press **New document** under **Documents** and choose the matter there.

2 Choose where to start and give it a title

Pick a template in **Start from**, or leave it on **Blank page**. Give it a **Title**, like "Letter to the buyer's solicitors", and press **Start writing**.

If you start from a template you can leave the title empty, and the document takes the template's name.

3 Write

The toolbar above the page has what you'd expect from a word processor: styles, fonts and sizes, bold and italic, colour, alignment, lists, tables, pictures and page breaks. Your work saves as you type, and the line by the title says **Saved.** once it has.

If your connection drops, keep going. Your changes go up as soon as you're back online.

4 Pick the letterhead

Choose one from the **Letterhead** list above the page. The page shows it straight away, just as it will print.

5 Check it

Press **Preview** to open the PDF in a new tab, exactly as it will be sent or printed.

6 Finish it

Press **Finish**. If the document came from a template with fields to fill in, fill them in, then press **Finish** again.

The finished PDF goes on the matter's **Documents** tab, and into Folio too if your organisation files finished documents there.

Working on it together

Anyone with a seat can open the draft while you're in it. You'll see their name above the page and their cursor in a colour of its own, and every change shows for everyone as it's made.

Finding your documents

Documents has four views: **Recently edited**, **Drafts**, **Finished** and **Templates**. Search by title or by the words inside.

To change a finished document, open it and press **Make changes**. That starts a draft of the next version, and the version you finished stays on the matter as it was.

If something goes wrong

The document says it's offline or can't be reached.

Your changes are kept on the page while it reconnects. Keep the tab open until it says **Saved.** again, and reload it if it doesn't within a minute.

Finish stays greyed out.

A field still needs filling in, or a change hasn't saved yet. Fill in every field and wait for **Saved.**, then try again.

You want to start again.

Press **Throw draft away** above the page. A finished version is never thrown away with it.