

YOUR ORGANISATION

The Your organisation handbook

Inviting your team, sign-in and screen lock, your branding, billing and keys.

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Set up your organisation and invite your team

Updated 14 October 2026 · unforged.ai/help/organisation/set-up-your-organisation-and-invite-your-team

Your organisation is the shared space your team works in. You set it up once, then invite colleagues by email and choose what each of them can do.

1 Create your account

Select **Get started** on our website and create your account, or sign in if you already have one.

2 Name your organisation

Type the name your team will recognise into **Organisation name**, for example Harper & Lowe, and select **Continue**. You can start using Unforged straight away.

3 Open your team

From **All products**, open **Organisation** and then **Team**. You will see everyone in the organisation, with anyone you have invited listed below them.

4 Invite a colleague

Select **Invite someone**, enter their **Email address** and pick a **Role**. You can add a short **Message** if you like, then select **Send invitation**.

5 Invite several people at once

To bring in a whole team, select **Invite many** and paste their addresses, one per line or separated by commas. Pick one **Role for everyone** and send. You can change anyone's role later.

6 Let them accept

Each person gets an email with a link that works for 7 days. They select **Continue to sign in**, sign in or create an account with the address you invited, and they are in.

Keeping track of invitations

Until someone joins, their row shows **Invited**, with who invited them and how long the link has left. Select **Resend** if the email has gone astray, or **Revoke** if you sent it to the wrong person. Once a link runs out the row shows **Expired**, and **Invite again** sends a fresh one.

Letting colleagues join with their work email

Under **Company domains** you can add your company's email domain and verify it with a DNS record. Once it shows **Verified**, turn on **Auto-join** and anyone with an address at that domain can join as a

Member or Viewer without waiting for an invitation.

If something goes wrong

You can't see [Invite someone](#) .

Only Owners and Admins can invite people. Ask one of them to invite your colleague or to change your role.

Your colleague says the invitation is for another account.

They are signed in with a different email address. Ask them to select [Sign out and continue](#) , then sign in with the address you invited.

Change what someone can do

Updated 14 October 2026 · unforged.ai/help/organisation/change-what-someone-can-do

What someone can do in Unforged comes from their role. When their job changes, you can give them a different role in a few clicks.

Before you start

You need to be an Owner or an Admin to change roles.

1 Open your team

From **All products**, open **Organisation** and then **Team**.

2 Pick the new role

Find the person in the list and choose a new role from the list in their row. A window opens showing their current role and what the new one lets them do.

3 Confirm the change

Select **Change role**. If they are already working in Unforged, the change reaches them within a minute.

The roles

An Owner can do everything, including billing. An Admin can do everything except billing, which covers inviting and removing people, keys and settings. A Member can run signature checks and add reference signatures. A Viewer can see checks and results but can't change anything. An Auditor can read the audit log as well. The Billing role looks after the plan and invoices, and a Desk user works only in Desk.

The full list of permissions for each role is at the bottom of the **Team** page, under **Roles and permissions**. Select someone's name to see their profile and exactly what their role lets them do.

If something goes wrong

A role is greyed out.

You can only give a role whose permissions you have yourself, and only an Owner can make someone else an Owner. Ask an Owner to make the change.

You can't change someone's role because they are the only Owner.

An organisation always needs at least one Owner. Make someone else an Owner first, then change the original role.

You can't change your own role.

Nobody can change their own role. Ask another Owner or Admin to do it for you.

Remove someone who has left

Updated 14 October 2026 · unforged.ai/help/organisation/remove-someone-who-has-left

When someone leaves, remove them from your organisation so they can no longer sign in to it. Their past work stays where it is.

Before you start

You need to be an Owner or an Admin to remove people.

1

Open your team

From **All products**, open **Organisation** and then **Team**.

2

Select Remove

Find the person and select **Remove** at the end of their row.

3

Decide about their keys

Also revoke API keys they created is ticked for you. Leave it ticked unless one of your systems still relies on a key they made, in which case untick it and replace that key soon.

4

Confirm

Select the **Remove** button with their first name on it. They lose access straight away, and the checks and records they worked on stay in place.

Afterwards

Wherever their name appears on past work, it now reads as a former member. If you kept their keys, their profile tells you which ones still work, and you can revoke them on the **API keys** page whenever you're ready.

If something goes wrong

The **Remove button is greyed out.**

They are the only Owner. Make someone else an Owner first, then remove them.

They had an invitation that hadn't been accepted yet.

Select **Revoke** on the invitation row instead, and the link in their email stops working straight away.

Set up two-step sign-in

Updated 14 October 2026 · unforged.ai/help/organisation/set-up-two-step-sign-in

Everyone who signs in with an email and password, or with a Google or Microsoft account, also enters a code from an authenticator app. You set it up the first time you sign in.

Before you start

You need an authenticator app on your phone. Most work well, and your company may already use one.

1

Scan the code

The first time you sign in, you will see **Set up your authenticator app** with a QR code. Scan it with your authenticator app, or type in the key shown under it if you can't scan.

2

Enter the six digits

Type the code your app shows into **Code from your authenticator app** and select **Continue**.

3

Sign in as usual from then on

Each time you sign in, Unforged asks you to **Confirm it's you**. Open your app and enter the code it shows.

4

Replace your authenticator

Getting a new phone? Open the menu under your picture, choose **Your profile**, and under **Two-step sign-in** select **Add an authenticator**. Scan the new code, enter a code from the app you use now and one from the new app, then select **Add authenticator**.

5

Remove the old one

Once the new one works, select **Remove** next to the old authenticator. You always need at least one, which is why you add the new one first.

When you won't be asked for a code

If you sign in with a passkey, or through your organisation's single sign-on, that already confirms it's you, so Unforged doesn't ask again. Your own company's sign-in looks after the second step instead.

If something goes wrong

Your code isn't accepted.

Codes change every 30 seconds, so wait for a fresh one and try again. If it still fails, check the time on your phone is set automatically.

You've lost the phone with your authenticator on it.

Write to us at support@unforged.ai from the email address you sign in with, and we'll help you back in.

Screen lock and changing your PIN

Updated 14 October 2026 · unforged.ai/help/organisation/screen-lock-and-changing-your-pin

If your organisation turns on the screen lock, Unforged locks itself when nobody has used it for a while, and you get back in with a six-digit PIN rather than signing in again.

1 Turn on the screen lock

An Owner or Admin opens **Organisation**, then **Settings**, and picks a time under **Screen lock**, from **2 minutes away** to **1 hour away**. It saves as soon as you pick.

2 Choose your PIN

The next time each person opens Unforged, they see **Choose your PIN**. Enter six digits twice and select **Save PIN**. Avoid runs like 123456 or one digit repeated.

3 Lock it yourself

Stepping away from your desk? Select **Lock** in the top bar, or press Ctrl+Shift+L (? Shift L on a Mac).

4 Unlock

When you come back you will see **Locked** with your name. Type your PIN and you carry on where you left off.

5 Change your PIN

Open the menu under your picture and choose **Your profile**. Next to **Screen lock PIN**, select **Change**, enter your **Current PIN** and your new one twice, then select **Change PIN**.

If something goes wrong

You've forgotten your PIN.

On the lock screen, select **Forgot your PIN? Sign out**. Sign in again as usual and you can choose a new PIN.

You were signed out after typing your PIN.

After a few wrong tries Unforged signs you out to keep your work safe. Sign in again and choose a new PIN.

You can't change the lock time.

Only Owners and Admins can change it. Ask one of them if the time doesn't suit your team.

Add your logo and name to your forms

Updated 14 October 2026 · unforged.ai/help/organisation/add-your-logo-and-name-to-your-forms

When you send someone a form to give their specimen signatures, it can carry your logo and name at the top, so they know who it's from and who to return it to.

Before you start

You need to be an Owner or an Admin to change your branding.

1 Open Branding

From **All products**, open **Organisation** and then **Branding**.

2 Add your name

Under **Name on your forms**, use the name your customers know you by, such as Harper & Lowe. Add your address or website on the line below if you'd like it shown, then select **Save**.

3 Upload your logo

Under **Your logo**, choose a PNG or JPEG of up to 512 KB and select **Upload**. A wide logo works best, as it prints about 4 cm wide at most.

4 Check how it looks

The preview beside the form shows the top of your forms as you change things. Select **Download a sample form** to see a full one.

Changing or removing it

To change your logo, upload a new one in the same place, or select **Remove logo**.

Remove your branding at the bottom of the page takes both the logo and the name off your forms, and you can add them again any time.

If something goes wrong

You can't see where to add a logo.

Save your name first, and the logo section opens up.

Your logo won't upload.

It needs to be a PNG or JPEG under 512 KB. Most design tools can export a smaller copy that will look just as good.

Pay for Unforged and download invoices

Updated 14 October 2026 · unforged.ai/help/organisation/pay-for-unforged-and-download-invoices

You pay for the checks you run, billed monthly. Once a card is on file you can see your usage and download every invoice from the same page.

Before you start

You need to be an Owner or have the Billing role to add a card or open invoices.

1 Open Billing

Open the menu under your picture and choose **Billing**, or go to **Organisation** and then **Billing**.

2 Add a card

Select **Add a card to start**. You will see the price per check, then continue to our secure payment page and enter your card details.

3 Check it worked

Back on the billing page you will see **Card added**. If you change your mind part way through, nothing is saved and no card is added.

4 Watch your usage

The **Usage** section shows what you've used this month. Pick an earlier month under **Invoices** to see that month instead.

5 Download invoices

Under **Invoices**, select **Open invoices** to see and download every invoice and receipt. To update your card, select **Manage billing** at the top of the page.

If you're on a contract

If you agreed a contract with us, we invoice you monthly by email to your billing contact, and you don't need to add a card. If your organisation sits under another one, the bill goes to them instead.

If something goes wrong

You see **Your last payment failed.**

Your checks keep running while we try the card again. Select **Manage billing** and update your card details.

You can't see **Add a card to start or **Open invoices**.**

Only Owners and people with the Billing role can see them. Ask an Owner, or write to us at support@unforged.ai if nobody can.

Create and revoke keys

Updated 14 October 2026 · unforged.ai/help/organisation/create-and-revoke-keys

An API key lets one of your own systems use Unforged. Make a separate key for each system, so you can revoke one without disturbing the others.

Before you start

You need to be an Owner or an Admin to see the **Keys** page.

1 Open Keys

From **All products**, open **Organisation** and then **Keys**.

2 Name the key

Select **Create key** and give it a **Name** that says where it's used, for example Loan system (prod).

3 Choose what it can do

Tick the permissions the system needs, or select **Checks only** for a key that just runs and reads signature checks. A key can't do more than you can yourself.

4 Copy it straight away

Select **Create key**, then **Copy**, and put the key wherever your system keeps its secrets. We only show it once, so if you lose it, create a new one.

5 Revoke a key

Find the key in the list, select **Revoke** and then **Revoke key**. Anything still using it stops working on its next request, and this can't be undone.

Keeping keys safe

Treat a key like a password. Keep it out of emails, chat messages and shared documents. If you think one might have leaked, revoke it and create a new one straight away.

The **Last used** column tells you whether a key is still in use, which helps when you're tidying up old ones.

If something goes wrong

A permission can't be ticked.

Your own role doesn't include it. Ask an Owner to create the key, or to change your role.

Your system stopped working after someone left.

Their keys may have been revoked when they were removed. Create a new key and update your system

to use it.

Choose which API version your systems use

Updated 14 October 2026 · unforged.ai/help/organisation/choose-which-api-version-your-systems-use

Your organisation stays on one API version until you choose to move, so a change on our side never surprises your systems. When a newer version comes out, you decide when to upgrade.

Before you start

You need to be an Owner or an Admin to change the version.

1 Open API version

From **All products**, open **Organisation** and then **API version**. You will see the version you're on under **Pinned**, and the newest under **Latest**.

2 Read what changes

If a newer version is out, **What changes** lists each difference. **How to upgrade >** explains what your developers might need to update.

3 Try it first

Under **Test first**, there's an example your developers can use to send the new version on a few requests before anything else moves.

4 Upgrade

When you're ready, select **Upgrade to** the new version, then **Upgrade**. Every key and webhook in your organisation moves at once.

5 Roll back if you need to

For 72 hours after a change you can select **Roll back to** the previous version, then **Roll back**. The page shows how long you have left.

If something goes wrong

You see **Stops working next to your version.**

That version is being retired on the date shown. Upgrade before then, and write to us at support@unforged.ai if you need more time.

The 72 hours have passed and something has broken.

Write to us at support@unforged.ai and tell us what's failing, and we'll help you sort it out.