

gatherdesk.

THE PRODUCT HANDBOOK · SEPTEMBER 2026

A clearer way to run the *day*.

Your practical guide to the Gatherdesk workspace—from the first enquiry to organised work, team handovers and billing.

📖 8 practical guides 10 business types gatherdesk.app

Screenshots show the actual application with illustrative demo data, not real customers. Available features depend on your business type, enabled services and permissions.

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Your first day in Gatherdesk

Find your workspace, understand the dashboard and set up a practical first workflow.

For business owners and new team members

Start with your business workspace

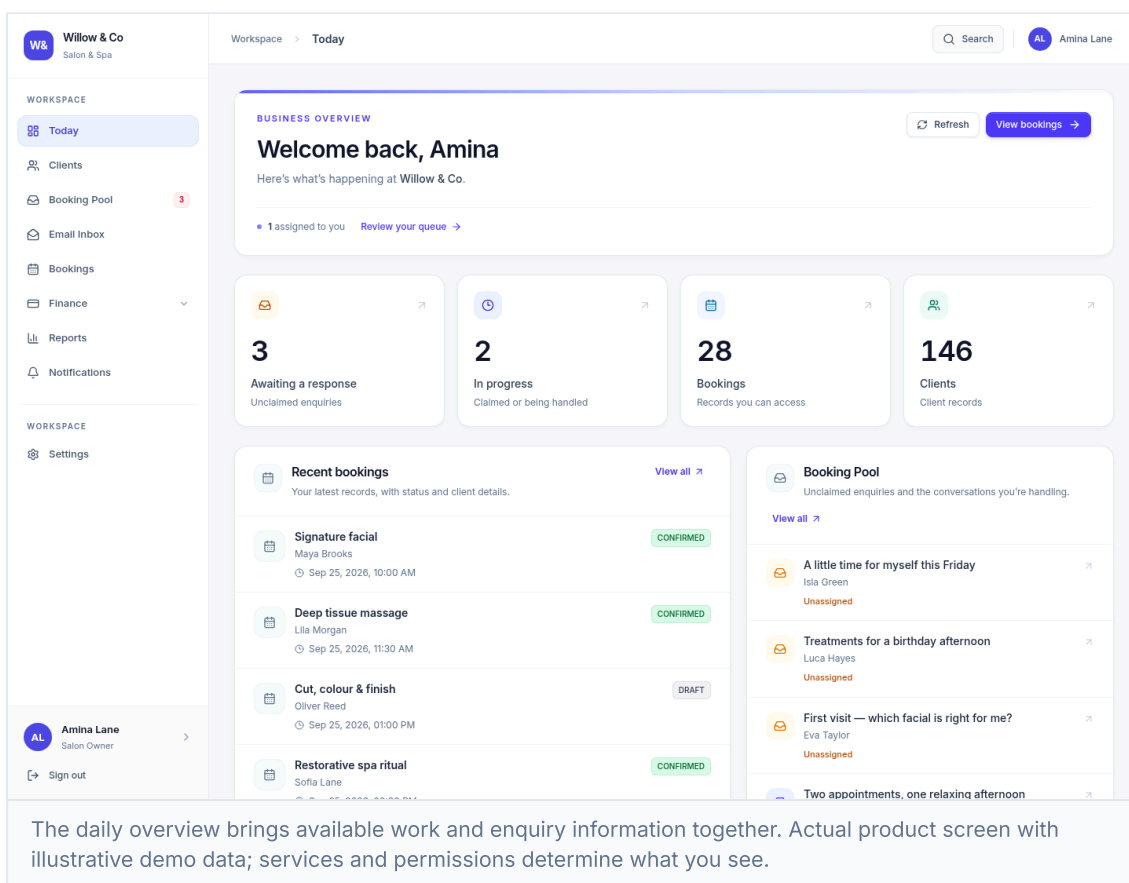
Use the workspace sign-in address supplied by your business administrator. Your business name and logo identify the workspace. After signing in, navigation and available actions reflect your role and the services enabled for that business.

If you are exploring Gatherdesk, Book a demo or Request a trial collects your business and contact details for follow-up. Submitting a request does not create a workspace, start billing or reserve a meeting time.

Get your bearings

Open Today or Dashboard to see your daily overview. Use the search control in the top bar to find records you are allowed to access. The sidebar focuses on everyday work; workspace administration lives under Settings.

Your industry changes the language you see. A salon works with bookings and clients; a trades business works with jobs and customers. An unavailable service or a restricted permission may mean that a tile, menu item or action does not appear.



Set up one complete workflow

1 Confirm your business identity

An administrator can open Settings → Company to review the name, logo and accent colour. The business type chosen at creation is permanent.

2 Review the team

Open Settings → Management → Team members and Roles & permissions. Give each colleague an individual account with the access needed for their work.

3 Choose an incoming channel

Configure a mailbox or website chat if those services are enabled. Route the source to the colleagues who should handle its enquiries.

4 Handle a first enquiry

Open the enquiry pool, claim an available request and send a reply. Check the response before marking the request handled.

5 Create the next piece of work

When your Work service is enabled, create a booking, job, project or other industry-specific work record. Add the customer, schedule and service items before preparing a proforma where invoicing is available.

If an option is missing

- Ask your administrator whether your role has permission for the action.
- Check Billing & plan for the workspace's enabled services. A configured integration still needs its service enabled.
- If a page shows a loading error, use Retry. An error does not mean your records have been deleted.
- When switching businesses, use the correct workspace address and account rather than assuming access carries over.

Business types and enabled services

Understand what changes by industry and how services, plans and permissions work together.

For business owners and administrators

A workspace in your business's language

Gatherdesk uses an industry profile for terminology, work structure, role names and relevant services. The business type is selected when the workspace is created and cannot be changed in either the business or platform administration screens.

Business type	Work record	People	Work structure
Travel agency	Itinerary	Clients	Days and items
Real estate agency	Deal	Buyers	Stages and fee lines
Medical / health clinic	Care plan	Patients	Consultations and procedures
Dental practice	Treatment plan	Patients	Appointments and procedures
Salon & spa	Booking	Clients	Appointments and services
Gym & fitness studio	Programme	Members	Sessions and exercises
Events & weddings	Event	Clients	Run sheet days and line items
Trades & home services	Job	Customers	Visits and tasks
Online store	Order	Customers	Shipments and line items
Other / general business	Project	Clients	Stages and line items

Three things decide what you can use

- 1

Business relevance
The industry profile limits which services can be offered. Travel inventory and travel documents belong to travel workspaces.
- 2

Service activation
The current plan limits which services can be activated. Free and Starter stay focused on customer conversations in every industry. Broader plans can expose relevant operational services; Website Chat also needs Enquiries.

3 Your permissions

Your role and source assignments determine what you can see and do inside those services. Administrator-only setup is separate from everyday staff actions.

Configuration is a separate step

An enabled service is not necessarily ready to use. Website chat also needs activation and allowed websites; email needs a connected mailbox; AI needs a selected provider and its key.

Scheduling follows the work

Salon, clinic, dental, fitness, event and trades work supports date and time inputs. Travel uses departure and return dates and consecutive itinerary days. Deals, orders and general projects use calendar dates, with precise times available for staff assignments.

Use the labels and fields supplied by your workspace. When a specialised feature is missing, changing the title of a work record does not add that capability.

What the current workflows cover

The industry profiles support the shared CRM flow: enquiries, customer records, work, service items, assignments and billing where enabled. They are a starting point for operational work, with explicit service boundaries.

- Clinic and dental profiles do not provide a complete clinical records or diagnostic system.
- An online-store order is not a complete stock, shipping or fulfilment integration.
- Property portals, recurring classes, room capacity and jurisdiction-specific tax rules require dedicated functionality beyond these shared records.

Claim, reply and hand over enquiries

Keep one clear owner for each enquiry, including conversations from your website.

For agents, managers and business administrators

One shared place for incoming requests

The enquiry pool groups requests by their ownership and handling state. Its displayed name follows your workspace's vocabulary. Use channel filters and search to focus on the requests you are allowed to handle. Website conversations join the same ownership workflow as other enquiries.

W& Willow & Co

Salon & Spa

WORKSPACE

Today

Clients

Booking Pool 3

Email Inbox

Bookings

Finance

Reports

Notifications

WORKSPACE

Settings

AL Amina Lane

Salon Owner

Sign out

Workspace > Booking Pool

Search

AL Amina Lane

Booking Pool

Live · 3 open, 1 claimed, 1 handling

Search subject, sender...

All 5

Email 3

WhatsApp

SMS

Web 2

Mine 1

Two appointments, one relaxing afternoon

You

Mia Clark 31m ago 2:57

— Hello! I would like to find out ...

Reply

Mark handled

Release

Reassign

Unassigned 3

A little time for myself this Friday

4m ago — Hello! I would like to find out ...

Claim

Mark handled

Assign

Treatments for a birthday afternoon

Luca Hayes 12m ago — Hello! I would like to find out ...

Claim

Mark handled

Assign

First visit — which facial is right for me?

23m ago — Hello! I would like to find out ...

Claim

Mark handled

Assign

Team 1

Follow-up on my treatment plan

Theo James 48m ago — Hello! I would like to find out ...

Noah

Mark handled

Reassign

Handled 12

ONLINE (3)

You

handling

Noah Reed

handling

Lea Morgan

free

Refreshes every 15s

A shared enquiry pool makes ownership visible to the team. Actual product screen with illustrative demo data.

Understand the ownership states

State	Meaning	What to do
Open	No current owner	An eligible team member can claim it.
Claimed	Reserved for one team member for five minutes before the first successful reply	Reply before the claim expires, or release the enquiry.
Handling	The first staff reply succeeded and the owner remains responsible	Continue the conversation, release it or mark it handled.
Handled	The enquiry is closed, retaining its history	A manager can reopen it when further work is needed.

Respond without duplicating work

1 Claim an open request

Claiming reserves the enquiry for you. If someone else claims it first, refresh and choose another request. Clicking Claim repeatedly does not extend the initial five-minute window.

2 Read the conversation

Check the original message and previous replies before writing. A visible countdown means you have a temporary claim.

3 Send and check the result

A successful reply moves the enquiry into handling. If ownership changes or a claim expires, sending is rejected and your draft is retained. For an uncertain email delivery, check the mailbox before resending.

4 Finish or hand over

Mark the enquiry handled when the conversation is complete. Release it to make it available again, or ask an authorised manager to reassign it to an eligible colleague.

Booking Pool

Live - 3 open, 0 claimed, 2 handling

Search subject, sender...

All 5 | Email 2 | WhatsApp | SMS | Web 3

Mine

A Friday afternoon for two (You) Handling

8m ago — Hello! I would like to find out ...

Mark handled | Release | Reassign

Website conversation Connected Visitor active

Mia Clark: Hi, can I book two massages for Friday afternoon? (25 Sept 2026, 01:16)

Amina: Of course. Would 2 pm work for both of you? (25 Sept 2026, 01:18)

Mia Clark: That would be perfect. How long is each session? (25 Sept 2026, 01:20)

You own this enquiry. Sending a reply keeps it assigned until you release it or mark it handled.

Each message is 60 minutes. I can help you choose your treatments.

Unassigned

- A little time for myself this Friday (4m ago) — Hello! I would like to find out ... Claim Mark handled Assign
- Treatments for a birthday afternoon (12m ago) — Hello! I would like to find out ... Claim Mark handled Assign
- First visit — which facial is right for me? (23m ago) — Hello! I would like to find out ... Claim Mark handled Assign

Read the thread, confirm who owns the enquiry and reply from the same place. Actual product screen with illustrative demo data; only the current authorised owner can send a staff reply.

Assignments and manager actions

Managers with the necessary access can assign or take over visible enquiries. The assignee list contains eligible colleagues for that request. Routing, mailbox restrictions and current permissions still apply; seeing a name elsewhere does not make that account eligible.

For website chat, the agent who owns the enquiry also owns the staff conversation. Automatic replies pause while a human owns the request. A visitor leaving the chat does not remove the enquiry from its staff owner.

Why a channel may be greyed out

- Web requires a paid plan with Website Chat, the Enquiries service, an enabled widget and at least one allowed website. Free shows Paid only until the plan changes.
- Email requires the relevant service and a configured mailbox accessible to your account.
- WhatsApp and SMS are not implemented yet and remain unavailable. The Phone filter is hidden.
- Source routing controls who may handle a source. It does not activate an integration.

Install chat on your website

Configure your business's widget, allow your website and send a first test enquiry.

For workspace administrators and website owners

Before you start

Your workspace needs the Website chat and Enquiries services enabled, and your account needs permission to edit settings. You also need access to add a script to your website. Each business has its own installation ID, allowed websites and conversations.

Configure and install the widget

1 Open Settings → Website Chat

Choose your title, subtitle, greeting, accent colour and widget position. Decide whether to ask visitors for their name and email before chatting.

2 Add your allowed websites

Enter the exact origins that can use the widget, such as `https://example.com` and `https://www.example.com`. Add both if you use both. Origins include the protocol, hostname and any non-default port; do not add page paths or wildcards.

3 Enable and save

Activate the widget and save your chat settings. The installation snippet becomes available once the required services, website allowlist and activation are ready.

4 Copy the installation snippet

Use Copy snippet and add the generated script before your website's closing `</body>` tag. Keep the generated installation ID exactly as supplied.

5 Send a test enquiry

Open an allowed website, start a conversation and send a test message. In Gatherdesk, open the Web channel in the enquiry pool, claim the request and reply. Confirm the visitor receives your reply.

W&Willow & CoSalon & Spa

WORKSPACE

Today

Clients

Booking Pool3

Email Inbox

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WORKSPACE

Settings

ALAmina LaneSalon Owner

Sign out

Workspace > Settings

Workspace Settings

Your business identity, team and connected services, in one place.

WORKSPACE PREFERENCES

Company

Business identity and branding

Website Chat

Website access, appearance and installation

Email & Privacy

Team visibility and connected mailboxes

AI Providers

Provider selection and your API keys

Management

Team, access, routing and plan

Website Chat

Add a chat button to your website. Conversations arrive in your team's enquiry inbox.

Active — your widget is ready to install on the allowed websites.

Enable Website Chat

Accept new conversations from your website.

Allowed website origins

https://willow.example

One origin per line: protocol, hostname and optional port. Add www separately. No paths or wildcards. For local testing include the port, for example http://localhost:8080.

Chat name

Welcome to Willow & Co

Subtitle

A little care starts with a conversation

Welcome message

Hello! Tell us what you have in mind and our team will help you find your perfect treatment.

Brand colour

#4f46e5

Button position

Bottom right

Ask visitors for their name and email before chatting

Configure the widget for the business and its allowed websites. Actual product screen with illustrative demo data; use the installation snippet generated in your own workspace.

Allowed websites are exact

Configured website	Allows	Does not also allow
https://example.com	The HTTPS site on that hostname	http://example.com or https://www.example.com
https://www.example.com	The www hostname over HTTPS	Other subdomains
http://localhost:3001	That local test site	http://127.0.0.1:3001 or other ports

i

Public installation details, private credentials

The loader URL and widget ID are visible in website source. They identify the public widget and are not login credentials. Never place an AI key, staff token or password in the snippet. Allowed origins restrict browser use; they do not verify a visitor's identity.

Add AI replies when you are ready

AI replies are optional. Enable the AI service, choose OpenAI or Claude in Settings → AI Providers and configure that provider's own key. Then add accurate business information in Website Chat and enable its AI-assisted replies option.

Human replies and enquiry collection work without automatic AI responses. Review the business information you provide, keep it free of secrets and make sure staff confirm prices, availability and important advice. A human claim pauses automatic replies.

If the widget does not appear

- Check service activation, the widget's enabled setting and the website allowlist.
- Compare the exact browser origin, including http/https, www and port, with the allowed entry.
- Use an actual web server for local testing. Opening an HTML file directly is not an allowed website origin.
- A live HTTPS website needs a publicly reachable HTTPS widget address. A localhost loader only works in a local development environment.
- If your website has a content security policy, its administrator must allow the configured widget host. Do not disable the site's security policy globally.
- Pausing the widget or removing a website blocks further visitor messages. Existing conversations remain in the workspace.

Team access and source routing

Give colleagues the right permissions and connect incoming sources to the right team.

For business administrators and managers

Find your management tools

Open Settings → Management. The Team & access group links to Team members and Roles & permissions. Communication & routing contains Source routing and Connected mailboxes. Only the tools available to your account are shown.

W&

Willow & Co

Salon & Spa

WORKSPACE

Today

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WORKSPACE

Settings

AL

Amina Lane

Salon Owner

Sign out

Workspace > Settings

Workspace Settings

Your business identity, team and connected services, in one place.

WORKSPACE PREFERENCES

Company

Business identity and branding

Website Chat

Website access, appearance and installation

Email & Privacy

Team visibility and connected mailboxes

AI Providers

Provider selection and your API keys

Management

Team, access, routing and plan

Company details

Your name, logo and colour, as they appear across the app, on your sign-in page and on your invoices.

W&

Company logo

PNG, JPEG, GIF or WebP · up to 2 MB. Shown on your sign-in page and your invoices.

Company name

Willow & Co

What your team and customers see.

Accent colour

#4f46e5

Sign-in address

willow-and-co

This is your workspace's identity — it's in your sign-in link and on your payment reference, so we manage it for you. Get in touch if it needs to change.

Save changes

Workspace settings separate branding, connected channels, AI configuration and management tools. Actual product screen with illustrative demo data.

Use a role for each responsibility

Role names can reflect your industry, but permissions determine which actions are allowed. A business administrator manages its own workspace; a platform operator manages platform-level businesses and subscriptions. These are separate kinds of access.

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1 Create individual accounts

An authorised administrator can create a user with the appropriate role and account details. Follow the account's verification and sign-in instructions; avoid shared staff logins.

2 Review the actual permissions

Use Roles & permissions to check access to customer information, work, finance, settings and administrative actions. A job title alone is not a permission grant.

3 Set the source assignments

In Source routing, connect eligible team members to the sources they should handle. Mailbox restrictions can further limit which email enquiries a person sees.

4 Check the staff experience

Ask the colleague to sign in with their own account. Confirm they can see the intended queue and perform their daily actions, without unrelated management tools.

Keep sensitive configuration with the right people

- Integration secrets need additional settings permissions. Ordinary agents do not need access to provider keys to handle assigned conversations.
- Only authorised managers can reassign an enquiry owned by someone else.
- The plan, enabled services, role permissions and source assignments all contribute to available actions.
- Deactivate accounts when colleagues leave and review remaining source assignments and role membership.

Resolve an access problem

Check that the colleague is in the correct business workspace and their account is active. Then review the enabled service, role permissions and source assignment for the specific task. Refresh after a change so the interface can load its current configuration.

If a button is visible but the server rejects an action, do not work around it by sharing another user's credentials. Ask an administrator to review the access configuration.

From customer work to an invoice

Create industry-specific work, add priced service items and keep customer billing consistent.

For team members with work or finance access

Create the right work record

1 Select the customer

Open your work area—Bookings, Jobs, Projects, Itineraries or your industry's equivalent—and create a record with the correct customer.

2 Set dates and currency

Use the dates or appointment times supplied by your business profile. Choose the intended currency before adding priced items or billing documents.

3 Add the service detail

Build the relevant appointments, stages, visits or days and add service items with descriptions, quantities and unit prices. The application calculates line totals.

4 Assign staff where available

When staff scheduling is enabled, choose registered staff and the correct time or date range. Overlapping reservations for the same registered resource are checked; free-text names cannot provide that resource check.

Check the timezone

Appointment editing currently uses the browser's local timezone. Confirm the intended times when colleagues work from different locations.

Prepare a proforma

With Invoicing enabled and the required permissions, open Finance → Invoices and create a proforma. Select a work record when the document relates to existing work, or create a standalone proforma when appropriate.

Linking work carries its customer and currency into the document. Review the total, due date and notes before saving. A proforma is a preliminary document; use the document's available issue/finalise action when it is ready to become an invoice.

Review before issuing

- Check the customer, currency, service descriptions, quantity, price and payment terms.
- Issued documents use a snapshot so later work edits do not silently rewrite an existing invoice.

- Once priced items or billing documents exist, changing the work's currency is blocked to avoid relabelling amounts.
- Record customer payments only when they have actually been received. Overpayments are rejected because there is no customer credit-balance ledger.
- Keep different currencies separate. Gatherdesk does not silently convert balances into a single currency total.

Customer finance and your Gatherdesk subscription

Finance contains the money your business bills or receives from its customers, plus supplier workflows when enabled. Settings → Management → Billing & plan contains your business's subscription to Gatherdesk. A payment in one area does not settle the other.

The available finance tools do not by themselves establish jurisdiction-specific tax or accounting compliance. Confirm the required invoice content and accounting process for your own business before issuing documents.

Your plan, services and payments

Review the workspace subscription, understand Free access and report a payment when required.

For business owners and authorised billing administrators

Read the current plan

Open Settings → Management → Billing & plan. The page shows the current plan, status, relevant dates, enabled services and billing history. This is your workspace's subscription to Gatherdesk, separate from your customer invoices.

A business starts on Free unless the platform operator explicitly assigns another plan. Free does not require a payment and does not automatically upgrade. A demo or trial request on the public website is a request for follow-up, not an automatic subscription change.

W&C

Willow & Co

Salon & Spa

WORKSPACE

Today

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WORKSPACE

Settings

AL

Amina Lane

Salon Owner

Sign out

Workspace

Billing & plan

Settings

Billing & plan

Billing & plan

Your subscription to Gatherdesk.

Free

✓ Free

£0.00

No payment required

PAYMENT

No payment required

No automatic upgrade

ENABLED SERVICES

4

Included in your workspace

TEAM SEATS

1/1

Includes administrators and pending invitations

Email customer service: shared enquiry pool, client records and connected email. No payment or automatic upgrade. Your team-seat allowance is full. Contact the platform operator to change your plan.

History

Free plan assigned

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An illustrative Free-plan workspace. This separate example shows the Free baseline; other screenshots demonstrate additional enabled services. Actual product screen with demo data.

Understand what is included

Free includes the shared enquiry pool, customer records and connected email. Paid chat channels stay visible but locked. Starter adds Website Chat and includes three total team seats: an administrator plus two colleagues in any permitted staff roles. WhatsApp is a paid-plan entitlement, but its integration is not available yet. Free and Starter do not include operational work or customer finance services, whatever the industry.

Use the current workspace screen for applicable pricing, interval, dates and services. Active staff and pending invitations count towards the enforced team-seat allowance, including administrators and managers. Customer records do not use staff seats. Existing accounts are retained after a downgrade, but additional staff or reactivations are blocked until space is available. Contact the platform operator to change the plan.

Report a payment when it is due

1 Check the payment instructions

Use only the configured payment method and destination displayed in the billing page. If the account details are not configured, contact the platform operator before sending money.

2 Complete the payment outside Gatherdesk

For an available bank-transfer method, use the displayed amount and payment reference. The application does not send a bank transfer for you.

3 Report the transfer

When your role and subscription permit it, submit the payment details through the page. A report remains pending until the platform operator verifies it.

4 Review the result

Check the status and billing history after review. Reporting a payment is not proof of settlement and does not independently renew the subscription.

When a plan ends

Cancelled or expired subscriptions fall back to the Free customer-service workspace. Paid channels and operational tools are unavailable while their data is retained. Overdue accounts display their payment and grace-period state. Check the current billing screen for the dates and actions that apply to your workspace.

There is no automatic card checkout in this flow. Do not assume that a saved payment report, a trial request or a service configuration activates paid access.

Branding, email and AI settings

Organise your workspace identity, connected mailboxes and optional AI provider.

For workspace administrators

Find the right settings section

Each section has its own save action. Moving between tabs preserves staged changes in the current page; it does not save them. Save the section before leaving or refreshing the page.

Section	Use it for
Company	Name, logo and accent colour
Website Chat	Widget appearance, activation, allowed websites and installation
Email & Privacy	Email visibility preferences and links to connected mailboxes
AI Providers	Provider selection, API key replacement and key removal
Management	Team, roles, source routing, mailboxes, billing and deleted items

Make the workspace your own

In Company, update the name, logo and accent colour your team and customers see. Review the upload requirements shown beside the logo field. Your business type and workspace identity are managed separately from visual branding.

The same business branding is used across relevant sign-in and document surfaces. Changes to a logo or display name do not change who may access the workspace.

Connect mailboxes and route the work

Use Settings → Management → Connected mailboxes to manage the accounts used by your business. Configure the mailbox with the credentials and connection details supplied by your email administrator. Use Source routing to assign eligible team members.

Review Email & Privacy to control the supported visibility options. A mailbox connection, source assignment and email service activation are separate setup steps. Verify sending and receiving with a test conversation before relying on the channel for customer enquiries.

Configure an AI provider

1 Choose the provider

Open AI Providers, select OpenAI or Claude (Anthropic), and save the selection. Your account needs permission to manage these settings and secrets.

2 Add its API key

Use the provider's key-console link in the settings page to create a key for the business, then save it in the matching provider section. Saving one provider's key does not delete the other.

3 Check service access

A saved key means configured, not activated or verified. The AI service must also be enabled, and the provider account must have valid access and available quota.

4 Enable the specific workflow

AI-assisted email drafts and work notes use the selected provider. Automatic website replies also need the Website Chat AI toggle and accurate business context.

Keep keys out of public content

Never place API keys in website snippets, notes or business context. The application stores provider keys separately from public widget settings and does not return their raw value in the settings response.

Keep a person in the loop

AI can help draft responses, but it may produce incorrect information. Check important advice, prices and availability before sharing. Business context and relevant conversation content are sent to the selected provider when that feature runs, so include only information appropriate for that purpose.

Selecting a provider without its key does not silently switch to another provider. If provider access, quota or application usage limits prevent a reply, human handling remains available. Removing a saved key disables the corresponding provider's readiness.

READY FOR YOUR FIRST DAY

Your workspace checklist

- ✓ Confirm your workspace address, business type and branding.
- ✓ Review the current plan and relevant enabled services.
- ✓ Give each colleague an individual account and appropriate permissions.
- ✓ Configure a mailbox or website widget and route its enquiries.
- ✓ Send a test enquiry, claim it and verify the visitor or customer receives a reply.
- ✓ Create a work record with the right customer, currency and schedule.
- ✓ Review document details before issuing an invoice.
- ✓ Configure an AI provider only if needed; review the information it receives.

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