gatherdesk.

THE PRODUCT HANDBOOK · NOVEMBER 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

Product views use illustrative data. Available features depend on your business type, enabled services and permissions.

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CHAPTER 01 · START HERE

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

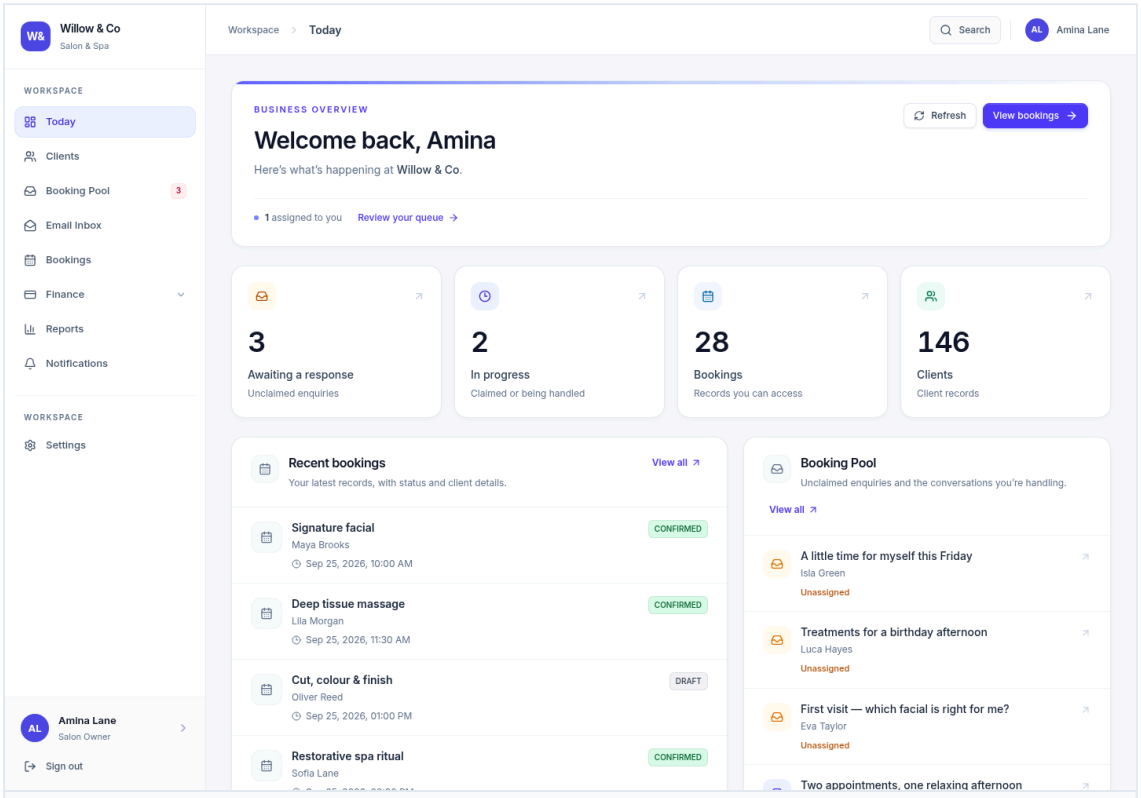
Use the workspace sign-in address supplied by your business administrator. Your business name and logo identify the workspace. After signing in, navigation and available actions reflect your role and the services enabled for that business.

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.



The daily overview brings available work and enquiry information together. Actual product screen with illustrative demo data; services and permissions determine what you see.

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.

CHAPTER 02 · START HERE

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. The one-time 7-day trial includes one connected email account and one website widget; WhatsApp requires a paid plan. Starter focuses on customer conversations, while 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 either Gatherdesk prepaid credits with an available managed provider, or a configured provider account using your own API 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.

CHAPTER 03 · DAILY WORK

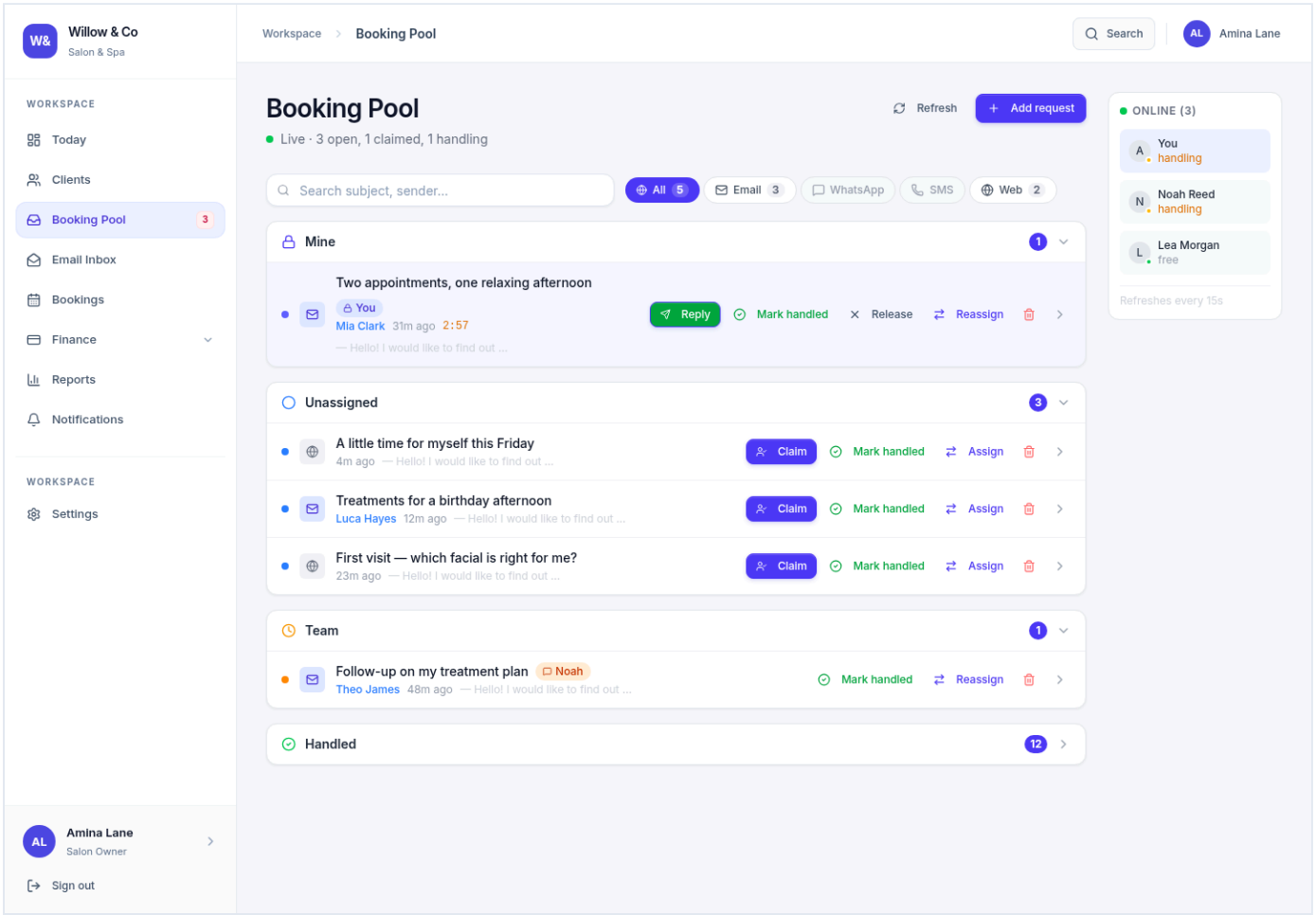
Claim, reply and hand over enquiries

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.



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**

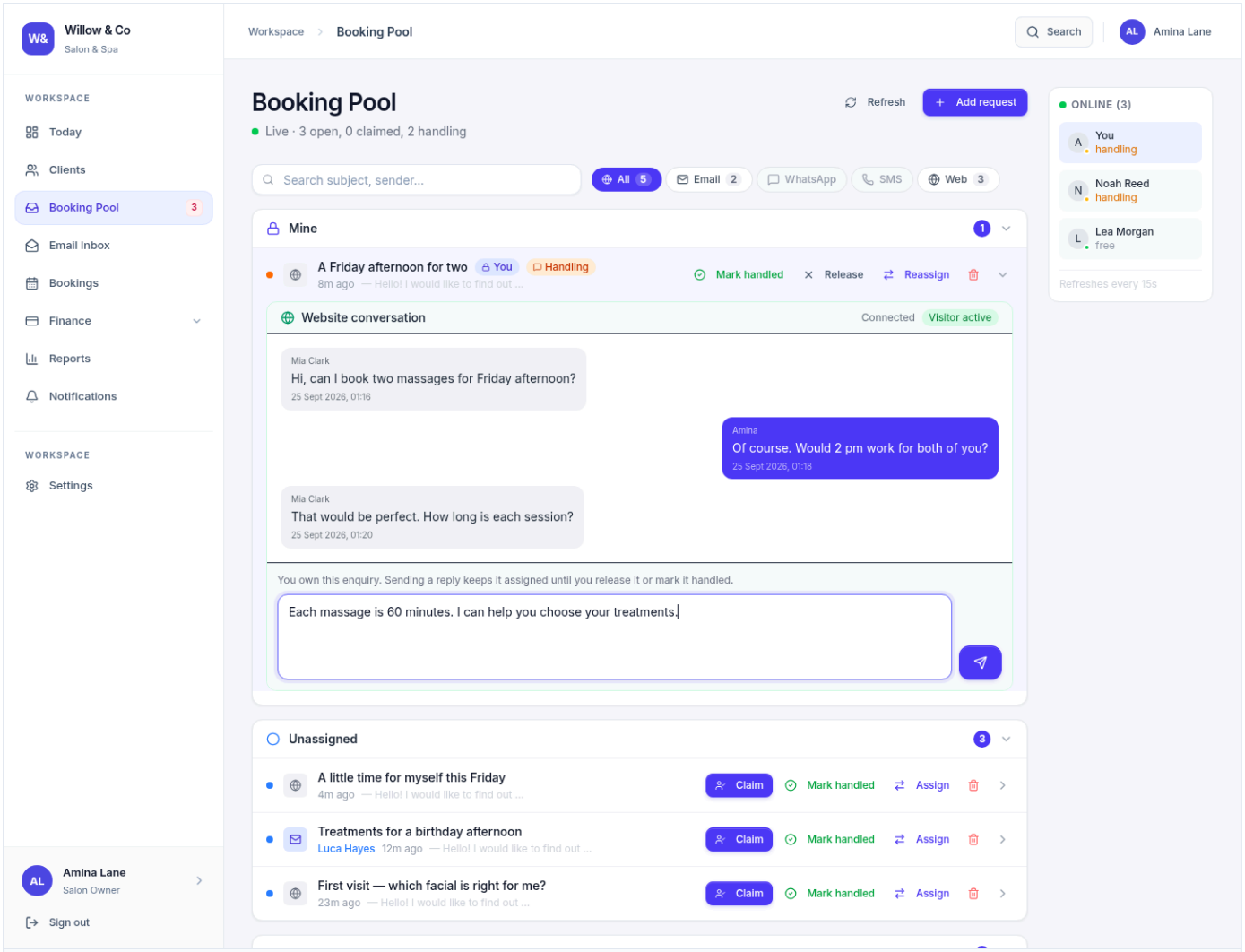
   Check the original message and previous replies before writing. A visible countdown means you have a temporary claim.

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.



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 enabled Website Chat and Enquiries services, an active widget and at least one allowed website. The one-time 7-day trial allows one website widget and one connected email account; WhatsApp requires a paid plan.
- Email requires the relevant service and a configured mailbox accessible to your account.
- WhatsApp requires a paid plan, an active WhatsApp service and a connected business number. SMS remains unavailable. The Phone filter is hidden.
- Source routing controls who may handle a source. It does not activate an integration.

CHAPTER 04 · WORKSPACE SETUP

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**

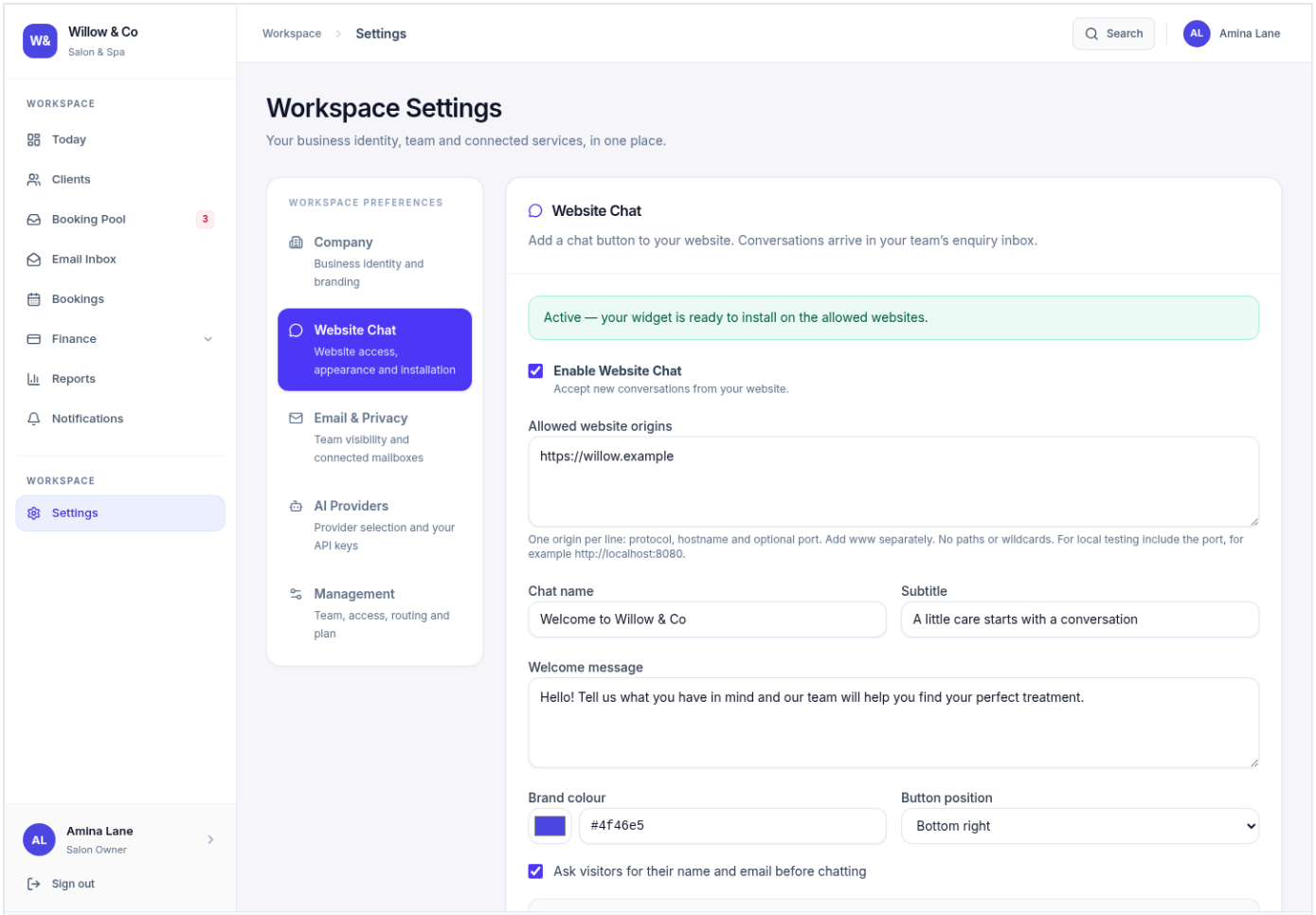
   Activate the widget and save your chat settings. The installation snippet becomes available once the required services, website allowlist and activation are ready.

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.



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

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 for eligible paid workspaces. In AI & Credits, choose Gatherdesk AI credits and an available managed provider, or My own API keys and your configured provider account. Add accurate business guidance and enable automatic replies in the relevant Website Chat settings. The selected provider must be available and ready to use.

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.

CHAPTER 05 · WORKSPACE SETUP

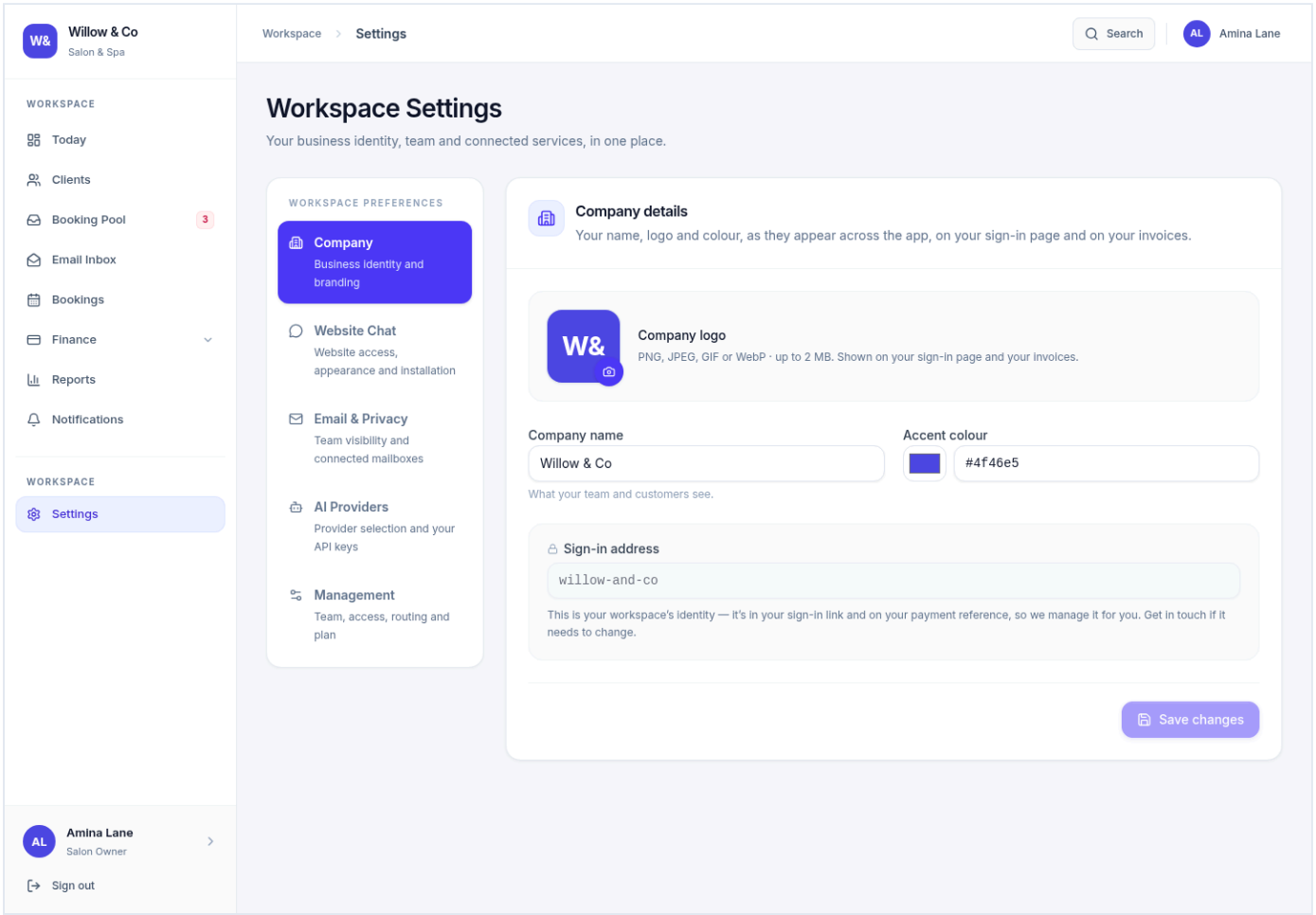
Team access and source routing

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.



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.

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.

CHAPTER 06 · DAILY WORK

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.

CHAPTER 07 · WORKSPACE SETUP

Your plan, services and payments

Start your 7-day trial, choose a plan and review your workspace subscription and payments.

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.

New workspaces receive one 7-day trial when they are ready to use, with one connected email account and one website widget. WhatsApp requires a paid plan. A public demo or trial request lets our team follow up and help with setup; sending the form does not create a workspace, start the trial clock or charge you.

Choose services for your team

Booking Pool brings your customer conversations and team ownership together. Starter includes connected email, website chat, WhatsApp and three staff seats, including your administrator. Professional adds invoicing, customer payments, reports, work records, scheduling, suppliers, quotes and the customer portal. Available services also depend on the workspace settings and your role.

WhatsApp becomes usable after your workspace connects and activates its own business number. Website chat uses your configured website installation. Review the current plan, team allowance and enabled services before choosing. Active staff and pending invitations count towards the allowance; customer records do not use staff seats.

Choose a paid plan

1. **Review the plan and billing interval**

   An authorised administrator opens Billing & plan and chooses the plan and billing interval that fit the team. This continues the same workspace and its records.

2. **Confirm secure checkout**

   Where online checkout is available, Paddle shows the recurring total and applicable taxes before you confirm. Payment and subscription status update after server verification.

3. **Manage an existing subscription**

   Use Billing & plan to review payment details, plan changes and subscription options. A plan change shows any immediate charge or credit and the new recurring total for review before confirmation.

Report an available bank transfer

1. **Check the configured instructions**

   If bank transfer is offered for this workspace, use the payment method, amount and reference shown in Billing & plan.

2. **Report the completed transfer**

   After making the transfer through your bank, submit its details in the billing page. The report stays pending while the platform operator checks it.

3. **Review the confirmed result**

   Confirmed payments appear in billing history and update the subscription. A saved payment report alone does not activate services.

Keep your workspace and history

When the trial ends, your saved records are retained and incoming customer messages keep arriving. Choose a paid plan to continue replying and working with your team. The one-time trial belongs to the workspace; switching plans or returning later does not start another trial.

Read the current billing status and any renewal or payment notice for the dates and actions that apply to your workspace. An expired subscription retains its records; restoring paid access preserves the business's settings and does not switch on a service its owner deliberately disabled.

CHAPTER 08 · WORKSPACE SETUP

Branding, channels and AI settings

Organise your workspace identity, communication channels 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
WhatsApp	Connect, pause and disconnect your workspace's business number
Email & Privacy	Email visibility preferences and links to connected mailboxes
Billing & plan	Subscription, payments and access to AI & Credits
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.

Connect WhatsApp Business

Open Settings → WhatsApp. With Your own Meta app, use a verified Cloud API number registered in your business portfolio, your Meta app ID and secret, WhatsApp Business account ID, phone number ID and a production system-user token. Gatherdesk verifies these credentials before saving them. Copy the generated callback URL and verification token into your Meta webhook settings, verify the callback, subscribe to messages, then refresh and activate WhatsApp.

Guided Meta sign-in is a separate option when enabled by Gatherdesk. It opens a Gatherdesk connection window and then Meta's sign-in flow. Both options keep your workspace's number, conversations and team assignments separate. Changing the connection method of an already bound account requires a supported migration; disconnecting does not erase its history.

Give team members WhatsApp access through Source routing. Claim the enquiry in the Pool or WhatsApp Inbox before replying. Freeform replies use the customer's 24-hour service window; outside it, select a supported approved template and confirm the customer's permission. Meta's messaging charges and payment method are separate from your Gatherdesk plan. WhatsApp Business app coexistence is not supported in this release.

Configure an AI provider

1. **Choose the provider**

   Open AI & Credits from Billing & plan or Management. Choose Gatherdesk AI credits or My own API keys, then choose a provider available in that mode. Your account needs permission to manage these settings and any secrets.

2. **Set up your chosen mode**

   With Gatherdesk AI credits, purchase prepaid credit and wait for payment confirmation; no workspace API key is needed. With My own API keys, create a key in your provider account and save it in the matching section; the provider bills you directly. Switching modes preserves existing credits and saved keys but uses only the selected mode.

3. **Check service access**

   A saved preference or key does not by itself enable replies. The workspace and channel must allow AI. Managed mode needs an available provider and sufficient credit; own-key mode needs a valid provider account and available quota.

4. **Enable the specific workflow**

   AI-assisted drafts and automatic replies use the selected provider and billing mode. Enable automatic replies for the specific Website Chat or WhatsApp resource and supply accurate business guidance. A staff reply or takeover pauses automatic responses until AI is resumed.

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.

An unavailable managed provider or missing own-provider key does not silently switch to another provider or billing mode. If provider access, credits, quota or application usage limits prevent a reply, human handling remains available. Removing a saved key disables the corresponding own-provider 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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