Desk overview

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Desk overview

What Desk is for

Desk is the project support work hub for finding queues, reviewing threads, and choosing a linked action. A queue groups work by the response or follow-up needed; a thread is the support work item you open before choosing what to do next.

If you need to…	Go to
Understand the Desk workspace	Before you start, then Understand the Desk screen
Find work waiting for a response	Find Desk and choose a queue
Triage or act on a work item	Work from Desk
Understand states and transitions	Desk states and actions
Move between application destinations	Navigation basics
Get help with a product question	Getting help

Before you start

Prerequisites

- Have a project selected. Without one, the page uses the no-project state instead of the Desk workspace.
- Have the information you need for the work item in front of you. The Desk uses a reply composer, a Docs Copilot question field for the documentation assistant, and a duplicate-target ticket field when those areas are available.

- Expect the queues, counts, thread rows, SLA indicators, knowledge-gap cards, customer fields,
  and enabled controls to depend on the project data and account setup available to you.

The reply composer accepts Markdown. In internal-note mode it uses the placeholder `Internal note — only your team sees this…`; otherwise it uses `Reply to the customer… (Markdown supported)`. The Docs Copilot question field uses `Ask the docs…`. The duplicate dialog accepts a
numeric ticket value and does not submit a non-positive or non-numeric value.

When ready, continue to Find Desk and choose a queue.

Find Desk and choose a queue

Desk is the destination for the project's support work. Select the **Desk** navigation entry, then
choose the queue that matches the work you need to review.

Prerequisites

- Have a project selected.
- Know whether you are looking for a first response, a next response, investigation, customer
  waiting, paused work, completed work, your work, or unassigned work.

Steps

1. Select the **Desk** navigation entry.
2. Select one queue from the table.

If you need to…	Select
Work on fresh work awaiting a first response	**Needs first response**
Work on a thread awaiting the next response	**Needs next response**
Review work being investigated	**Investigating**
Review work waiting for the customer	**Waiting for customer**
Review work paused for later	**Paused for later**
Review work completed today	**Done today**
Review fresh triage work	**Triage**

If you need to…	Select
Review your threads	**Your threads**
Review unassigned work	**Unassigned**

Result: The selected queue is the work list you use for the next review.

Continue to Understand the Desk screen to identify the areas used for that queue.

Understand the Desk screen

The Desk screen is organized around selecting work, opening a thread, and choosing the next
action. The queue area provides the queue choices; the thread list provides work rows; the open
thread area provides the conversation and composer; and the context area provides **Docs Copilot**,
Customer, and **Activity**.

Use the following areas to orient yourself:

Area	What to look for
Queue area	Queue names and their counts.
Thread list	A work row with its title or description, type, response-time countdown when one appears, origin, relative time, and comment count.
Open thread area	The thread title and number, timeline, reply composer, and status choices.
Context area	**Docs Copilot**, **Customer**, and **Activity** tabs.
Reply composer	A multiline field for a reply or an internal note.
Docs Copilot question field	A single-line question field with the placeholder `Ask the docs…`.
Duplicate dialog	A numeric ticket field with the placeholder `Ticket # (e.g. 13)`.

When the selected queue is **Triage**, the list includes the triage shortcut row with the keys
`1`, `2`, `3`, and `H`. When a thread is open, the context tabs and thread actions become
relevant to that thread. A non-empty reply enables the reply actions; an empty reply or an active
send keeps those actions unavailable.

After identifying the area you need, continue to Choose what to do next.

Choose what to do next

Use this decision table after you select a queue or open a thread. Each option points to the
action that matches the work you are trying to complete.

If you need to…	Use
Select a work item	Select the thread row.
Add an internal-only note	**Internal note**
Check Markdown before sending	**Preview**
Return from preview to editing	**Write**
Send a customer reply	**Send**
Send a reply and complete the thread	**Send & done**
Move the thread to investigation	**Investigating** in the status bar
Wait for the customer	**Waiting for customer** in the status bar
Pause the thread	**Paused** in the status bar, then choose a snooze option
Complete the thread	**Done** in the status bar
Wake paused work	**Wake now**
Reopen completed work	**Reopen**
Merge a duplicate thread	**Merge into ticket** in the duplicate dialog
Ask the documentation assistant a question	Enter a question in the Docs Copilot field and use its send control
Add a completed copilot answer to the reply	**Add to composer**
Review customer details	**Customer**
Review the activity history	**Activity**
Review a cited source	Select its source entry, then **Back** to return to the answer

Prerequisites

- Open the thread before using thread-specific actions.
- Enter reply text before using **Send**, **Send & done**, or **Preview**.

- Enter a ticket number before using **Merge into ticket**.

Steps

1. Choose the row in the table that matches the work you need to complete.
2. Select the named control in that row.

Result: The relevant Desk action, status choice, context tab, or linked procedure is ready
for the work item.

For the detailed triage and work-item procedure, continue to Work from Desk.
For state changes and their lifecycle meaning, continue to
Desk states and actions.

If the page instead shows an empty or conditional state, continue to Handle empty and conditional
states.

Handle empty and conditional states

The page can take different paths depending on the selected project, queue contents, open thread,
thread type, email availability, and current thread state. Use the condition that matches what is
on screen.

When…	The page uses or offers…
No project is selected	`No project selected` ; `Pick a project from the switcher to open the Desk.` ; `The Desk shows one project's support threads at a time.`
A queue has no threads and no knowledge-gap cards	`Nothing here` ; `New threads land in Triage and Needs first response.` ; `This queue is clear.`
No thread is open	`No thread open`
A thread has no reporter email and internal-note mode is off	`No email on file — the customer can only see this on their tracking page.`
The queue is **Triage**	The triage shortcut row and its queue-specific actions.
The queue is **Triage** or **Needs first response** and gap proposals exist	Knowledge-gap cards after the first three thread rows, including **Draft with AI** when available.

When…	The page uses or offers…
The thread type is `QUESTION`	The Docs Copilot automatic-question path when its service is available.
The copilot answer includes a `SRC` source	The source-preview warning `Code/internal source — review before sharing with the customer.`
The thread state is paused	**Wake now**
The thread state is done	**Reopen**

Steps

1. Use the matching row to follow the offered action or message.

Result: You are using the queue, empty state, thread state, or conditional action that matches the current Desk situation.

If an action does not respond as expected, continue to When Desk does not respond as expected.

When Desk does not respond as expected

Use the exact message shown to choose the next step. The messages below cover empty states,
missing customer contact information, Docs Copilot, and duplicate handling.

Message	What to do
`No project selected`	Use the project switcher before opening Desk.
`Pick a project from the switcher to open the Desk.`	Select a project, then return to Desk.
`The Desk shows one project's support threads at a time.`	Continue after selecting the project whose work you need.
`Nothing here`	Choose another queue if you need to review different work.
`New threads land in Triage and Needs first response.`	Check `Triage` or `Needs first response` for new work.
`This queue is clear.`	Continue with another queue or another task.
`No thread open`	Select a thread row before using thread-specific actions.

Message	What to do
`No email on file — the customer can only see this on their tracking page.`	Use an internal note when the response must stay with your team, or follow the product's tracking-page process.
`Copilot needs the docs index — generate docs first.`	Stop the copilot request and continue to Documentation generation lifecycle.
`Couldn't load this page preview.`	Return to the copilot answer with `Back` and continue without the preview.
`Drafts only — nothing sends without you.`	Review a draft before using a reply control.
`Open a thread to see context here.`	Select a thread before using the context area.
`Mark #ATL-{ticketNumber} as duplicate`	Enter the canonical ticket number in the duplicate dialog.
`Closes this thread with a pointer into the canonical one — the full thread stays readable.`	Confirm that the target ticket is the canonical thread before selecting `Merge into ticket`.

If the Desk page does not open, start with Getting help. For supported recovery paths, continue to Common issues and solutions.

When the message is resolved, continue to Continue with the right Desk procedure.

Continue with the right Desk procedure

Desk is the starting point for choosing work, not a replacement for each focused procedure. After
you identify the queue, thread, and intended action, continue with the page that owns that job.

Continue when you need to…	Page
Triage and act on work items	Work from Desk
Understand states and actions	Desk states and actions
Move between application destinations	Navigation basics
Route a question or request for help	Getting help
Recover from a supported common problem	Common issues and solutions

Result: You have a queue-based starting point and a focused next page for the action or state you need to handle.