

Desk states and actions

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Overview

Desk is the work queue for triage and follow-up. Use it to move support threads through the Desk lifecycle and choose the next action for each thread.

A support thread is a customer conversation that you triage, answer, pause, complete, or reopen. A queue groups threads by work state, ownership, or triage status.

An internal note is a message for your team attached to a support thread.

The lifecycle states are `Needs first response` , `Needs next response` , `Investigating` , `Waiting for customer` , `Paused for later` , and `Done` .

If you need to...	Go to
Choose the queue that contains the work	Find and open the work
Understand the current state and available controls	Understand the thread state and available actions
Reply, add an internal note, or change the state	Change state and respond
Handle triage, snoozing, duplicates, or shortcuts	Handle state and thread variations
Review the Desk surface and its queues	Desk overview
Work through a Desk item	Work from Desk

Prerequisites — what must be in place for this to go smoothly

Before changing a Desk thread, select the project whose support threads you need to work on. A thread selection later gives you the detail, composer, state controls, and context tabs for that thread.

Collect the reply or **Internal note** text you want to enter before you start. If the thread is a **Question**, the documentation assistant can ask the customer's question automatically. If the thread has no reporter email, the page displays this warning when you are not writing an **Internal note**:

No email on file – the customer can only see this on their tracking page.

The available action depends on the thread state. A paused thread has **Wake now**, and a done thread has **Reopen**. Select the project before finding the thread you want to change.

Find and open the work

A Desk queue is a group of support threads selected by work state, ownership, or triage status. Use the queue that matches the work you want to handle.

Prerequisites

- You have selected a project.
- You know whether you need a triage, response, ownership, or completion queue.

Steps

1. Open **Desk**.
2. Select the queue that matches your work:

If you need to...	Select
Work on new, unowned items	Triage
Work on threads assigned to you	Your threads
Work on items without an assignee	Unassigned
Find threads awaiting a first reply	Needs first response
Find threads awaiting the next reply	Needs next response
Find active investigation work	Investigating
Find threads waiting for the customer	Waiting for customer
Find threads paused for later	Paused for later
Find threads completed today	Done today

3. Select the thread row you want to handle.
4. Open the selected thread's detail.

If the selected queue has no available thread, the page shows `Nothing here` and `New threads land in Triage and Needs first response`.

Result: The thread detail is open, with its current state, conversation, and available actions on screen. You can now identify the state and choose an action.

Understand the thread state and available actions

The open thread's detail surface combines the conversation, reply composer, state bar, and context tabs. Use it to identify the current state before changing it.

The composer includes these fields and actions:

Area	What you use it for
Reply body	Enter a customer reply in Markdown.
Internal note body	Enter a note for your team when internal-note mode is active.
Duplicate ticket number	Enter the positive ticket number of the canonical thread.
Copilot question	Ask the documentation assistant a question.
Internal note	Switch between a customer reply and an internal note.
Preview	Preview the Markdown draft; select Write to return to editing.
Send	Send the reply.
Send & done	Send the reply and mark the thread done.
Attach	Attachment control; it is disabled.

The context tabs are **Docs Copilot**, **Customer**, and **Activity**. Docs Copilot is the documentation assistant, Customer provides customer context, and Activity provides the thread's activity history.

The state bar presents `Investigating`, `Waiting for customer`, `Paused`, and `Done` as state choices. A paused thread also presents **Wake now**; a done thread also presents **Reopen**. A thread in `Needs first response` or `Needs next response` displays its derived state as a non-clickable current label.

Change state and respond

Changing a state tells the Desk how the thread is being handled. Replying records the customer-facing response; an internal note records information for your team.

Prerequisites

- You have opened the thread you want to handle.
- You have the reply or internal note text ready.
- For a duplicate action, you have the positive ticket number of the canonical thread.

Steps

1. Select the state action that matches the work:

If you need to...	Select
Take the thread for yourself	Press A .
Investigate the thread	Investigating
Wait for the customer	Waiting for customer
Pause the thread	Paused
Complete the thread	Done
Wake a paused thread	Wake now
Reopen a completed thread	Reopen

2. Choose what you need to write:

If you need to...	Use
Send a customer-facing response	Reply body
Record information for your team	Internal note

3. Enter the text in the selected field.
4. Select **Preview** when you need to check the rendered Markdown.
5. Select **Write** to return from the preview to the composer.
6. Select the send action that matches the result you need:

If you need to...	Select
Send the reply and keep the thread open	Send
Send the reply and mark the thread done	Send & done

7. If a knowledge-gap card offers **Draft with AI**, select it to start a document draft for that gap.
8. When the Copilot answer is ready, select **Add to composer** to place it in the reply draft.

Result: The selected reply, note, state action, or document draft is shown in the corresponding Desk surface. Use the variation that matches the thread's state or triage route when a special path is needed.

Handle state and thread variations

Triage is the starting view for fresh, unowned work. Paused and done threads use different follow-up actions, and a duplicate thread requires a canonical ticket number before it can be merged.

Prerequisites

- You have opened the relevant thread.
- For a triage action, the thread is in **Triage**.
- For a wake action, the thread is paused.
- For a reopen action, the thread is done.

Steps

1. Choose the applicable route:

If you need to...	Action
Accept triage work and assign it to yourself	Press 1 or A .
Mark the thread as a duplicate	Press 2 .
Decline triage work	Press 3 .
Snooze triage or thread work	Press H or Z .
Complete thread work	Press E or select Done .
Focus the composer	Press R .
Toggle an internal note	Press N or select Internal note .
Focus Docs Copilot	Press D .
Send a reply	Press  or select Send .
Send a reply and complete the thread	Press  or select Send & done .
Open the shortcut map	Press ? .

2. If you are snoozing the thread, choose when to resume it:

If you need to...	Select
Resume the thread in one hour	1 hour
Resume the thread tomorrow morning	Tomorrow 9:00
Resume the thread next week	Next week

3. For a duplicate, enter the canonical ticket number in the duplicate ticket number field.

4. Choose what to do with the dialog:

If you need to...	Select
Merge the thread into the canonical ticket	Merge into ticket
Leave the duplicate dialog without merging	Cancel

5. If the thread has no reporter email, select **Internal note** when the message must not be customer-facing.

When the knowledge-gap condition applies, the card appears in **Triage** or **Needs first response** after the first three thread rows. Select **Draft with AI** on the card to start the document draft.

Result: The selected variation is handled with its matching state action, snooze choice, duplicate dialog, knowledge-gap action, or shortcut. The thread is ready for the recovery guidance or next-queue guidance below.

When an action does not complete

The Desk provides messages for empty states, missing customer contact information, Copilot failures, preview failures, and duplicate handling.

What you see	What to do
No project selected	Select a project from the switcher before opening Desk work.
No thread open	Select and open a thread from a queue.
Nothing here	Select another queue, or wait for new work in Triage and Needs first response .
New threads land in Triage and Needs first response .	Look in Triage or Needs first response for new threads.

What you see	What to do
No email on file – the customer can only see this on their tracking page.	Select Internal note when the customer must not receive the response.
Copilot needs the docs index – generate docs first.	Generate the documentation index before using Copilot.
Couldn't load this page preview.	Return to the answer or draft and continue without the page preview.
Mark #ATL-<ticket number> as duplicate	Enter the canonical ticket number in the duplicate ticket number field, then select Merge into ticket .
Closes this thread with a pointer into the canonical one – the full thread stays readable.	Confirm that the canonical ticket number is correct before merging.

Know what happens next

A changed thread remains in a queue only while it matches that queue's state or ownership rule. Accepting, declining, or snoozing fresh triage work removes it from the triage view; a state change can move it to another queue.

After completing an action, continue in [Work from Desk](#) for the broader triage procedure. Use [Desk overview](#) when you need the work-hub orientation again.

Result: The thread is in the queue that matches its resulting state or ownership, and you know which Desk page to use for the next task.