

Getting help

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Getting help

Choose the right help surface

Desk is the work area for triaging and following up support threads. Issues is the area for

reviewing reported problems and directing them to an issue list or board.

Use this page when you need to route a request, reply to a support thread, or review reported

issues. For a full explanation of Desk, see [Desk overview](#). For the complete Desk procedure, see [Work from Desk](#). For Desk states and transitions, see [Desk states and actions](#).

If you need to...	Go to
Choose a queue for a support request	Open Desk or Issues
Reply to a customer or keep a note for your team	Work a support request in Desk
Change a support thread's state	Desk states and actions
Review reported problems and their charts	Review reported issues
Work on one issue record	Work with an issue
Manage an issue board	Manage issue boards
Recover from a broader problem	Common issues and solutions

Before you start

Prerequisites

- Have a project selected in the project switcher.
- Know whether you are routing a support thread or reviewing a reported issue.

Desk and Issues are both scoped to the selected project. Without a selected project, each surface shows its project-selection empty state.

Open Desk or Issues

Prerequisites

- A project is selected.

Steps

1. Open the navigation and choose one destination.

If you need to...	Choose
Triage or follow up a support request	Desk
Review reported problems	Issues

2. If you opened Desk, choose the queue or view that matches the work.

If you need to...	Choose
Find requests waiting for a first reply	Needs first response
Find requests waiting for another reply	Needs next response
Find requests being investigated	Investigating
Find requests waiting for the customer	Waiting for customer
Find requests paused for later	Paused for later
See work completed today	Done today
See the triage queue	Triage
See your threads	Your threads
See threads without an assignee	Unassigned

Result: Desk opens the selected queue or view, or Issues opens its overview.

Understand the help surfaces

The Desk composer is where you write a customer reply or an internal note. The duplicate dialog uses a ticket-number field. The Issues overview uses a time-range selector to change

the reporting
period.

Surface	What to use	What it does
Desk thread composer	Reply to the customer... (Markdown supported)	Enter the reply that you plan to send to the customer.
Desk thread composer	Internal note — only your team sees this...	Enter a note intended for your team.
Duplicate dialog	Ticket # (e.g. 13)	Enter the ticket number of the canonical thread.
Issues overview	Time range	Select the reporting period.

The no-thread and missing-email branches are handled in [Handle empty and unavailable states](#).

Work a support request in Desk

A support thread is the place to respond to a request, keep team-only context, and move the work through its Desk state.

Prerequisites

- Desk is open with a thread selected.
- For a customer reply, the composer contains the reply text before you send it.

Steps

1. In **Reply to the customer... (Markdown supported)**, enter the response for the customer.
2. To keep the text for your team instead, select **Internal note** before entering it in **Internal note — only your team sees this...**
3. Select **Preview** to review the customer-facing Markdown.
4. Choose the send action that matches the work.

If you need to...	Choose
Send the reply and keep the thread open for follow-up	Send
Send the reply and mark the thread complete	Send & done

5. Select the next thread state.

If you need to...	Choose
Mark the thread as being investigated	Investigating
Mark the thread as waiting for the customer	Waiting for customer
Mark the thread complete	Done
Reopen a paused thread	Wake now
Reopen a completed thread	Reopen

6. To postpone the thread, select **Paused** and choose one snooze period.

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

7. In the duplicate dialog, enter the canonical ticket number in **Ticket # (e.g. 13)**.

8. Select **Merge into ticket** to merge the current thread into the entered ticket.

9. If you opened the duplicate dialog without merging, select **Cancel**.

When the composer is blank, **Preview**, **Send**, and **Send & done** are unavailable. A paused

thread shows **Wake now**, and a completed thread shows **Reopen**.

Result: The reply, internal note, state change, snooze choice, or duplicate merge appears in

the Desk thread view. For the next Desk state or action, continue with [Desk states and actions](#).

Review reported issues

An issue is a reported problem that you review from the Issues overview before opening the detailed issue list or a board.

Prerequisites

- A project is selected.

- Issues is open.

Steps

1. Select **Time range** to set the reporting period.
2. Review the overview charts for the selected period.
3. Choose the next action.

If you need to...	Choose
Reload the issue statistics and issue list	Refresh
Open the complete issue list	All issues
Open issue boards	Boards

4. In Recent Reports, select **View all** to open the complete issue list.

The overview can display No activity in this period yet , No daily activity yet , No priority data yet , No resolved tickets yet to analyze , No category data yet , No audience data yet ,

or No reported pages yet when the corresponding view has no data.

Result: The Issues overview shows the selected period, or the application opens All issues or Boards for the next step.

Handle empty and unavailable states

An empty state tells you which required context to provide before the normal help surface can appear.

What you see	What to do
No project selected on Desk	Use the project switcher, then return to Desk.
Pick a project from the switcher to open the Desk.	Select a project before opening Desk.
No project selected on Issues	Use the project switcher, then return to Issues.
Pick a project from the switcher to see its reported issues.	Select a project before opening Issues.
No thread open	Select a thread in Desk.

What you see	What to do
No email on file – the customer can only see this on their tracking page.	Use an internal note for team-only text, or understand that a customer reply is visible only on the tracking page.

If an Issues chart has no data, keep the selected period or choose another period from **Time range**. The chart message identifies which part of the overview has no data.

Result: The required project or thread is available, or the relevant empty-state message remains visible with the next action identified.

Recover from an error and continue

Desk applies a reply or state change in the thread view first, then reconciles it with the service response. If the service rejects a transition, Desk restores the earlier thread state; if it rejects a reply, Desk restores the earlier thread and draft.

What you see	What to do next
Reply failed – restored your draft	Review the restored text and try Send or Send & done again when the thread is ready.
Duplicate merge failed	Check the ticket number in Ticket # (e.g. 13) and try Merge into ticket again.

The Issues overview loads its statistics and issue list together. Refresh the overview with

Refresh when you need to request the current statistics and list again.

For the next Desk state or action, continue with [Desk states and actions](#).

For a specific issue, continue with [Work with an issue](#). For board work, continue with [Manage issue boards](#). For broader recovery paths, continue with [Common issues and solutions](#).

Result: You have a next action for a failed Desk operation and a destination for continued Desk, issue, or board work.