

Work from Desk

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What the Desk is for

A support thread is a record of a customer's request and the team's replies and actions. The Desk is the work hub for triaging and acting on support threads. Use it when you need to sort incoming work, take ownership, move a thread through its working states, or respond to the customer.

Desk work is organised into queues and views. A queue is a list of threads grouped by their working state; a view is a list grouped by how you need to work. The available states include

Needs first response, **Needs next response**, **Investigating**, **Waiting for customer**, **Paused**, and **Done**. The available views include **Triage**, **Your threads**, and **Unassigned**.

If you need to...	Go to
Review newly arriving work	Triage
Find work waiting for a first response	Needs first response
Find work waiting for the next response	Needs next response
Continue work assigned to you	Your threads
Pick up work without an assignee	Unassigned
Review the lifecycle and action meanings	Desk states and actions
Learn where Desk sits among the application destinations	Desk overview

Before you start

Desk works one selected project's support threads at a time. Select the project you need before you begin. The Desk page also uses the selected bucket—the queue or view you choose—to determine which work list and related knowledge-gap content to request.

Prerequisites

- Have a project selected in the project switcher.
- Know whether you are looking for new triage work, your own threads, unassigned work, or a state-specific queue.
- Have the thread information you need before replying or adding an internal note.

If no project is selected, the page presents the following message:

No project selected

It also presents:

Pick a project from the switcher to open the Desk.

and:

The Desk shows one project's support threads at a time.

The selected bucket controls whether knowledge-gap cards are requested. A knowledge-gap card marks a recurring resolved topic that has no documentation page. The cards are requested for **Triage** and **Needs first response**. The Copilot rail is the area for documentation and thread context; it depends on an open thread, and its documentation content depends on the available thread and documentation context.

Find and open a work item

A work item is a support thread that you select from a Desk queue so you can review its history and take the next action.

Prerequisites

- Select the project whose work you want to handle.

Steps

1. Select one of the following queues or views:

If you need to...	Select
Review work awaiting triage	Triage
Find a first response to send	Needs first response
Find a later response to send	Needs next response
Review work being investigated	Investigating
Review customer-waiting work	Waiting for customer
Review postponed work	Paused for later
Review work completed today	Done today
Review threads assigned to you	Your threads
Review threads without an assignee	Unassigned

2. Select the work-item row in the thread list.

Result: The selected work item is open for triage, status changes, replies, internal notes, or documentation assistance.

Understand the Desk screen

The Desk screen brings the work list, the open thread, and supporting context into one workspace.

The left rail contains queues and views. The middle list contains thread rows. The open-thread

pane contains the conversation, composer, and status bar. The right rail contains

Docs Copilot,

Customer, and **Activity** tabs when a thread is open.

The composer is the area where you write a customer reply or internal note. The thread pane also

includes these controls:

Area	Controls or content
Composer	Internal note, Attach , Preview or Write , Send , Send & done
Status bar	Investigating , Waiting for customer , Paused , Done , Wake now , Reopen
Copilot rail	Docs Copilot , Customer , Activity , Ask
Knowledge-gap card	Draft with AI or Draft doc from this cluster →
Dialogs and previews	Cancel , Merge into ticket , and Back

The **Attach** control is disabled and marked as coming soon. The Desk screen does not provide a native search field, filter field, or grid-column surface. Use the queues and views in the left rail to choose the work list.

Triage and act on the work item

Triage is the work of deciding who handles a thread, what status it needs, and whether it belongs with another thread. The available actions include accepting, investigating, waiting, snoozing, waking, completing, reopening, and declining a thread.

Change a thread status

Use this procedure when the open thread needs a different working state.

Prerequisites

- Open the work item you want to update.

Steps

1. In the status bar, select the action that matches what you need to do:

If you need to...	Select
Start investigating the thread	Investigating
Wait for the customer	Waiting for customer
Postpone the thread	Paused
Complete the thread	Done
Return a paused thread to active work	Wake now

If you need to...	Select
Return a done thread to active work	Reopen

Result: The status bar reflects the selected working state.

Snooze a work item

Use snoozing when the thread should leave the immediate queue and return at a later time.

Prerequisites

- Open the work item you want to postpone.

Steps

1. Select **Paused** in the status bar.
2. Select one of the available return times:

If you want the thread to return...	Select
In one hour	1 hour
Tomorrow morning	Tomorrow 9:00
Next week	Next week

Result: The work item is paused for the selected return time.

Mark a work item as a duplicate

Use the duplicate route when the open thread belongs with an existing canonical ticket. The canonical ticket is the existing thread that remains as the main record.

Prerequisites

- Open the duplicate thread.
- Know the positive ticket number of the canonical thread.

Steps

1. In the **Triage** view, press **2** to open the duplicate dialog.
2. Enter the canonical ticket number in **Ticket # (e.g. 13)**.
3. Select **Merge into ticket**.

Result: The duplicate thread is closed with a pointer to the canonical thread, while the full thread remains readable.

Reply, add an internal note, or use Copilot

An open thread gives you three response paths: write to the customer, write an internal note for your team, or ask documentation questions in **Docs Copilot** before preparing a reply.

Send a customer reply

Use a customer reply when the text belongs in the customer's conversation.

Prerequisites

- Open the thread you want to answer.
- Have the reply text ready.

Steps

1. Enter the reply in the composer with the placeholder `Reply to the customer...` (Markdown supported) .
2. Optional: select **Preview** to review the formatted reply.
3. Select **Send**.

Result: The reply is submitted to the open thread.

Add an internal note

An internal note is a message for your team rather than a customer reply.

Prerequisites

- Open the thread you want to annotate.

Steps

1. Select **Internal note**.
2. Enter the note in the composer with the placeholder `Internal note – only your team sees this...` .
3. Select **Send**.

Result: The note is submitted as an internal thread message.

Ask Docs Copilot

Use **Docs Copilot** when you need documentation help while working on an open thread. It lets you ask a documentation question and review the returned material before adding it to a reply.

Prerequisites

- Open a thread.
- Have a question about the work item or the documentation.

Steps

1. Select **Docs Copilot**.
2. Enter your question in `Ask the docs...`.
3. Select **Ask**.
4. Select **Add to composer** when the answer is suitable for the draft.
5. Select **Back** to return from a source preview.

Result: The selected Copilot content is available in the reply draft for your review.

When the work item cannot be acted on

Use the message on screen to choose the next safe action. Empty states describe where work is available; warnings describe a condition on the open thread; Copilot messages describe a documentation or preview problem.

What you see	What it means	What to do
Nothing here	The selected queue has no displayed work.	Select another queue or view.
New threads land in Triage and Needs first response.	New threads are directed to those queues.	Select Triage or Needs first response .
This queue is clear.	No selectable row is available in the selected queue.	Select another queue or view.
No thread open	Thread-specific controls remain unavailable until you	Select a row from the thread list.

What you see	What it means	What to do
	select a row.	
No email on file – the customer can only see this on their tracking page.	The open thread has no reporter email and the composer is not in internal-note mode.	Use an internal note or continue only when the tracking-page visibility is intended.
Copilot asks the customer's question automatically...	Copilot is preparing the customer's question.	Wait for the Copilot response.
No automatic question is started for this thread type – ask the docs anything about this ticket below.	This thread type does not start an automatic Copilot question.	Enter a question in Ask the docs... .
Copilot needs the docs index – generate docs first.	Copilot needs a documentation index before it can answer.	Generate the documentation index, then ask again.
Couldn't load this page preview.	The selected source preview did not load.	Select Back and continue from the Copilot answer.
Code/internal source – review before sharing with the customer.	The source is internal material.	Review it before adding content to a customer reply.
Keyboard shortcuts	The shortcut map is open.	Press ? to close the map.

What happens next

After you act on a thread, continue from the state shown in the status bar. For the full meaning

of each state and action, open [Desk states and actions](#).

If you need to move to another application destination, use [Navigation basics](#).

For product questions or support routing, use [Getting help](#).

Result: You know which Desk state to review next and where to continue when the work leaves this page.