

# 5. How to Delete a Desk

## *When to Delete a Desk*

1. You ran a pilot “Beta Test” Desk that never went live.
2. You permanently closed one of your “Office” desks.

**Deletion is permanent:** All membership links and any Desk-specific workflows disappear. Only manually created Desks can be deleted; you cannot remove a Project’s Default Desk.

### **Step 1. Locate the Desk**

In the Desks module, find the card for the Desk you wish to remove.

### **Step 2. Initiate Deletion**

Hover over that card and click the  **Delete** icon in the top-right corner.

### **Step 3. Confirm Permanently**

A modal appears warning you: “**Are you sure?**”


Click **Confirm** to proceed, or **Cancel** to back out.

### **Step 4. Post-Deletion Cleanup**

Any Clients still assigned to that Desk automatically fall back to the Project’s Default Desk. Review your Default Desk to reassign those Clients or move them to another active Desk.

## **Best Practices & Tips**

**Rename vs. Delete:** If the Desk’s purpose changes, prefer renaming and updating membership to preserve history.

**Regular Audits:** Monthly, use the  Show members view to verify only current employees retain Desk access.

**Pre-Deletion Reassignment:** Before deleting, move high-priority Clients or Requests elsewhere to avoid workflow disruption

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