

TASK MANAGEMENT WITH AI · SWITZERLAND

Operating Desk

The Operating Desk runs the tasks of your business and connects the systems you already use: email, file storage, contract repository, CRM and ERP. Apart from task data and, if desired, the address book, the Desk works with the data in these systems. Nobody has to switch to another system for every task. AI prepares the work, your people review and decide.



Solid: available. Dashed: planned.

An inbox for all incoming items.

Shared mailboxes and, on request, the «Desk» folder of a personal mailbox. Every message becomes a proposal for the responsible role. Items without an email, such as scanned post, are recorded by hand.

Filing in your file storage.

Attachments and the original email go to the Desk's library in your file storage and stay with the task, also for the next person in charge.

Tasks with a goal.

Every task states what must be true once it is done. With role, person, deadline and the complete history.

Replies as drafts in the mailbox.

AI proposes a reply. The Desk places it as a draft in the mailbox, and it is sent from your mail program.

Roles, handover, approval.

Claim, assign or hand over to another role with a reason. Where approval is required, only the authorised role can close the task.

Contracts with review dates.

Contracts sit with the counterparty, with annexes and versions. AI pre-fills the contract fields from the PDF. The review date becomes a task in good time.

In test operation with real data at two Swiss businesses since October 2026.

WHAT THE DESK DOES FOR YOU

- **Less management by email.** Responsibility, status and approval stay with the task. Internal forwarding and status requests fall away.
- **AI at defined points.** AI proposes role, counterparty, goal and reply and, at the push of a button, puts together a plan. Responsibilities, deadlines, permissions and approvals are fixed rules in the code. Without AI, work continues by hand.
- **Your systems stay.** Mail stays in the mail system, files in the file storage, accounting in the ERP. The Desk runs the tasks and keeps references to mail and files.
- **Your instance, your code.** Instance hosted in Switzerland or on your own infrastructure. The language model is Claude by Anthropic, with a choice of Claude Opus 5.5 or Claude Sonnet 5.5; on request a model from OpenAI or a locally hosted one. On request, you receive the source code as a backup copy or as a basis for your own development.

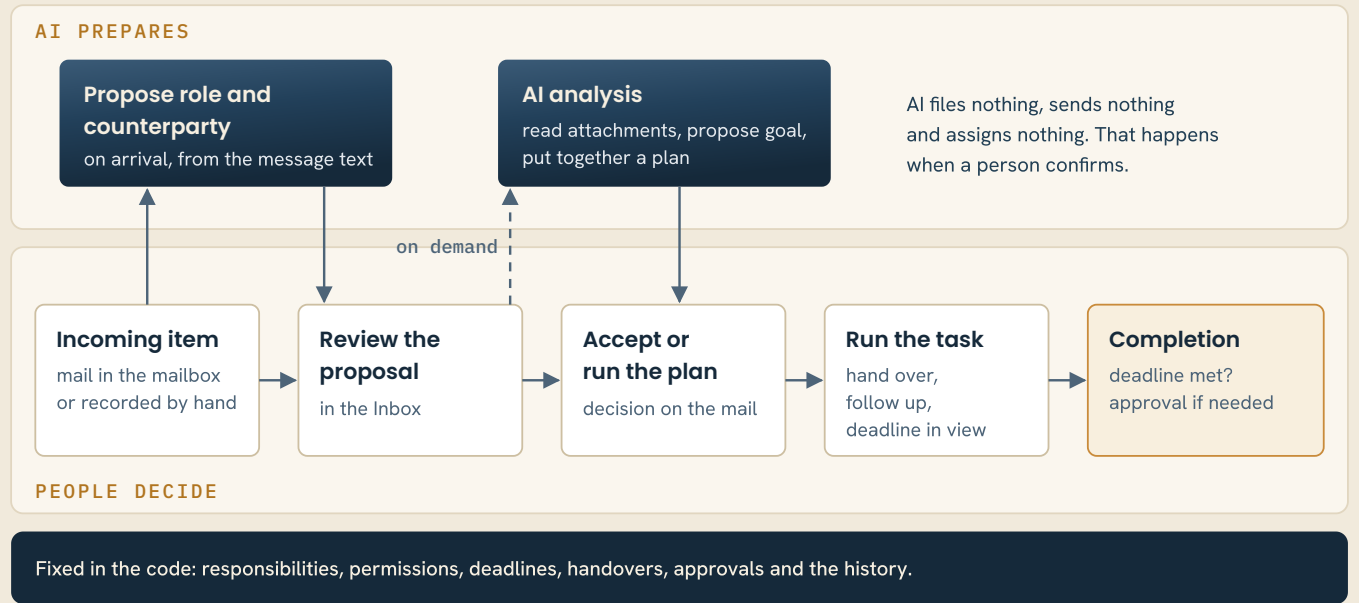
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How the Desk works



02

Review and accept.

Whoever holds the role reviews the proposals and accepts, or reviews the AI's plan and runs it with one click. Selected attachments and the original email go to the Desk's library in your file storage. A follow-up message arrives as a new incoming item, and the Desk proposes the existing task. One click attaches it, and the person in charge sees «new mail». Tasks can also be created by hand.

DIALOGUE WITH THE AI

Opus 5.5 · high · read 08.10.2026, 08:50

► Looked up 2 times in the desk

INFO AI, 08:50
Alpenblick Logistik AG wants a second living wall on the 2nd floor, delivery by the end of November. The floor plan is attached as a PDF. The first wall in the entrance hall has been in place since spring.

GOAL AI, 08:50
Alpenblick Logistik AG has a quote for the wall on the 2nd floor with delivery by the end of November.

PLAN AI, 08:50
1. **Create a new task, you work on it.** Title: "Quote for second wall, 2nd floor". Role: Verkauf. Goal: "Alpenblick Logistik AG has a quote for the wall on the 2nd floor with delivery by the end of November.". Counterparty: Alpenblick Logistik AG. Attachments: Grundriss_2OG.pdf.

2. **Create draft in Outlook.** Reply text: "Dear Mr Keller

Thank you for your enquiry and the floor plan. We will check the location on the 2nd floor and send you the quote by the middle of next week. Delivery by the end of November is feasible.

Kind regards
Karl Kautabak"

The desk carries out the 2 steps one after the other in your name, each like a click. At the first no it stops. Sending happens in Outlook.

QUESTION OR INSTRUCTION TO THE AI

The AI answers here, adjusts the plan or asks back, but does not carry anything out.

Send

Run plan

Accept ...

Add to a task

Discard

The AI's plan, ready to review and run. Sample data.

03

Run it to completion.

Claim, assign, hand over to a role. A task waiting for a reply carries a follow-up date. Deadlines show an early warning and when they are overdue. On completion, the Desk records whether the deadline was met. If approval is required, the task only counts as done once it is given.

Bewässerung Wand Eingangshalle tropft

T-16 · Ticket P2 · Waiting for reply, follow up on 08.10.2026 · Waiting for: Foto vom Wasserfleck · Resolution due soon, on 08.10.2026 14:20 · Service · Karl Kautabak · Contact person: Martin Keller

INTERN

Set reporter

PRIORITY

P2

 Funktion eingeschränkt

Change

RECEIVED

07.10.2026, 14:20

TIMES

per company default

RESPONSE

by 07.10.2026 18:20 · met

RESOLUTION

by 08.10.2026 14:20 · due soon

Record clock as met

COUNTERPARTY

Alpenblick Logistik AG ·

Change counterparty

What has to be true when this is done

Die Bewässerung der Wand in der Eingangshalle ist dicht.

Change

Get AI suggestion

History

08.10.2026, 09:30	System	Deadline state of task T-16 changed.
08.10.2026, 09:00	Karl Kautabak	Email from m.keller@alpenblick-logistik.ch «AW: Bewässerung Wand Eingangshalle tropft» added to the task.
07.10.2026, 15:15	Karl Kautabak	Task T-16 is waiting for a reply from the other party, follow up on 08.10.2026.
07.10.2026, 15:12	Karl Kautabak	Response to task T-16 met. Recorded by hand (07.10.2026, 15:10): Rückruf beim Kunden
07.10.2026, 14:40	Karl Kautabak	Proposal accepted, task T-16 created.

Overviews

Waiting for you: everything that concerns a person, with the reason, plus the pool of their roles.

Who carries what: open work per person and role.

Assigned by me: what they have handed on or recorded for others, with status and deadline.

Waiting for you

5 in your roles · 3 assigned to you · 2 in the pool

[Help](#)

T-16

Service · Karl Kautabak

P2

Bewässerung Wand Eingangshalle tropft

Resolution by
08.10.2026 14:20

Waiting for reply · Due soon

● new mail

Follow-up due since 08.10.2026 · Resolution: due soon, on 08.10.2026 14:20 · P2

T-15

Service · Pool

P4

Beleuchtung der Wand im Empfang defekt

Response by
07.10.2026 17:00

Open · **Overdue**

Claim, or hand the role on.

T-14

Service · Pool

P1

Pumpe Wand Sitzungszimmer Genf ausgefallen

Response by
08.10.2026 09:50

Open · Due soon

Claim, or hand the role on.

T-17

Geschäftsleitung · Karl Kautabak

Contrat-cadre NT-2024-206 : renouvellement

12.10.2026 17:00

In progress · Due soon

T-1

Geschäftsleitung · Karl Kautabak

Vertrag prüfen: Rahmenvertrag Begrünung NT-2024-206

30.10.2026 17:00

In progress · Deadline running

Waiting for you: what concerns the person, with the reason. Sample data.

Overviews

Dates: all open deadlines of the business in date order, on request only the review dates of contracts.

List and search: search across ID, title, goal, note and file name. Semantic search with AI can be switched on and turns a sentence into filters.

Open windows pick up changes without reloading. When someone is working on a task, the others see it.

Dates 6 total · 6 open · 1 overdue · 1 due soon		Help
All deadlines · Contracts only		
T-21	Verwaltung · Lea Brunner	
	Lieferantenrechnungen September prüfen	
06.10.2026 17:00	In progress · Overdue	
T-17	Geschäftsleitung · Karl Kautabak	
	Contrat-cadre NT-2024-206 : renouvellement	
12.10.2026 17:00	In progress · Due soon	
T-18	Verwaltung · Lea Brunner	
	Offene Posten Alpenblick Logistik AG abgleichen	
16.10.2026 17:00	In progress · Deadline running	
T-20	Verkauf · Lea Brunner	
	Referenzfotos der Wand Eingangshalle aufnehmen	
23.10.2026 17:00	In progress · Deadline running	
T-22	Verwaltung · Lea Brunner	
	Servicebesuch Wand Genf planen	
27.10.2026 17:00	In progress · Deadline running	
T-1	Geschäftsleitung · Karl Kautabak	
	Vertrag prüfen: Rahmenvertrag Begrünung NT-2024-206	
30.10.2026 17:00	In progress · Deadline running	
Review date V-1		

Dates: all open deadlines of the business. Sample data.

Tickets and reports

Tickets: a task with a priority (P1 to P4) becomes a ticket. The Desk calculates the due times for response and resolution, by company default or by contract, on request within service hours only. While the team waits for the customer, the resolution time can pause.

Tasks with priority

3 open · 1 overdue · 2 due soon · 0 confirmation pending

[Help](#)

P4

T-15

Open

Service · Pool

Beleuchtung der Wand im Empfang defekt

Alpenblick Logistik AG

Response

07.10.2026 17:00

overdue

Resolution

19.10.2026 17:00

open

P1

T-14

Open

Service · Pool

Pumpe Wand Sitzungszimmer Genf ausgefallen

Léman Consulting SA · V-1

Response

08.10.2026 09:50

due soon

Resolution

08.10.2026 15:50

open

P2

T-16

Waiting for reply

Service · Karl Kautabak

Bewässerung Wand Eingangshalle tropft

Alpenblick Logistik AG

Response

07.10.2026 18:20

met

Resolution

08.10.2026 14:20

due soon

▶ CLOSED

12

Tickets with priority, response and resolution times. Sample data.

Tickets and reports

Reports: for a period, the Desk shows how many tickets met their response and resolution times, per customer and priority, and lists the late ones. Export to Excel: per ticket for internal work or as a report without title and description for passing on.

Léman Consulting SA					
P1	1 task				
	met	late	open	waived	Met rate
Response	0	1	0	0	0 %
Resolution	1	0	0	0	100 %
P3	2 tasks				
	met	late	open	waived	Met rate
Response	2	0	0	0	100 %
Resolution	1	1	0	0	50 %
P4	1 task				
	met	late	open	waived	Met rate
Response	1	0	0	0	100 %
Resolution	1	0	0	0	100 %

Reports: commitments met per customer and priority. Sample data.

Contract documents	
Main contract	
Rahmenvertrag Begrünung NT-2024-206 mit Nachtrag 1.pdf	
Earlier versions: Rahmenvertrag Begrünung NT-2024-206.pdf	
Anlage 1 Standort Genève	
Anlage 1 Standort Genève.pdf	
Valid: «Rahmenvertrag Begrünung NT-2024-206 mit Nachtrag 1.pdf».	
Confirmed by Karl Kautabak on 15.09.2026, 11:05.	
Review	
T-1	Geschäftsleitung · Karl Kautabak
Vertrag prüfen: Rahmenvertrag Begrünung NT-2024-206	
30.10.2026 17:00	In progress

Contract with annexes, versions and review date. Excerpt, shortened. Sample data.

AI and fixed rules

What AI does: read and classify incoming mail, propose role, counterparty and goal, put together a plan at the push of a button and answer questions about it, draft replies, propose contract fields from the PDF, translate search requests.

Without AI: the Desk keeps running. Tasks are then recorded and classified by hand.

Traceable for audits: every action is recorded with person and time in the task's history; these entries are only ever appended, never changed or deleted. Every entry in the dialogue with AI is only ever appended, too. A checksum chain shows whether anything was changed or removed on the server.

What is fixed in the code: responsibilities, permissions, deadlines, handovers, approvals and the history. AI files nothing, sends nothing and assigns nothing. That happens when a person confirms.

Costs in view: every model call is logged, the monthly cost is shown in the header.

Dialogue log

Every entry in the dialogue with the AI is only appended, never changed or deleted, not even by the administration. A checksum chain across all entries shows whether something was changed or removed on the server.

Check chain

Chain intact, 9 entries. Checked 08.10.2026, 09:30.

At the start on 08.10.2026, 09:30: intact, 9 entries.

AI log with checksum chain. Sample data.

Ask the desk

The desk answers from this manual. Question and answer are not stored.

YOUR QUESTION

How do I accept a proposal?

Ask

To accept a proposal:

Open the «Inbox» and find the card of the proposal.

Click «Accept ...»; role and counterparty are prefilled, you can change them.

Enter the «Goal»: what has to be true when the task is done.

Under «Copy attachments into the task» you choose which attachments come along.

Then click «Accept for myself» or «Hand to the role».

With AI, you review the plan instead and carry it out with «Run plan».

Send as bug or idea

«Ask the desk» answers questions about the manual. Sample data.

Integration and operation

BUSINESS SYSTEMS

BUSINESS SYSTEM	SYSTEMS	READS	WRITES
Sign-in	Microsoft Entra ID, on request Google and other single sign-on methods	sign-in with the company account	nothing
Email	Microsoft 365 (Exchange Online), on request Google Workspace	inbox of shared mailboxes; for personal mailboxes only the «Desk» folder; attachments	reply draft in the source mailbox (shared mailboxes); never sends
File storage	SharePoint, on request Google Drive	approved libraries and folders, search, preview	only the task library
CRM / ERP	bexio, on request CashCtrl and Abacus	contacts for the address book, with a preview before import	optional: new addresses, if the address book is kept there
Document management (optional)	on request, for example M-Files, DocuWare or ELO	documents and storage locations, search, preview	only the task library
Language model	Claude by Anthropic, on request OpenAI or a locally hosted open-weight model	proposals, plans and answers	nothing

Claude connection (MCP). Optional: an authorised person queries the Desk from their own Claude with their sign-in, for example for individual tasks or for related tasks that are not linked to each other. The Desk hands out mail and files only as references.

DATA AND OPERATION

- One isolated instance per business: one data set, one address book.
- Hosted in Switzerland or as a container on your own infrastructure.
- The Desk stores tasks, history, address book, contracts, references, reply texts and the AI log. Mail stays in the mailbox, files in the file storage.
- For proposals, analyses and questions, message content, attachments and the necessary details from tasks, contracts and files go to the language model. With Claude, Anthropic processes this data; with a locally hosted model it stays in-house.
- Automatic backups, checked before older backups are overwritten.
- Address book: the business decides whether it is kept centrally in the Desk or in the CRM or ERP.
- Administration in the interface: people, roles and permissions, mailboxes, storage locations, public holidays, end of business day.
- Interface in German and English.
- Further business systems are connected via a dedicated connector. Sign-in via Microsoft Entra ID, other single sign-on methods on request.

Scope. The Desk is not an ERP, not a CRM and not a second file store. Accounting stays in the ERP, files stay in the file storage, mail in the mail system. The Desk runs the work in between.

Frequently asked questions

We already have a DMS, a CRM and an ERP. Why do we need the Desk?

Because between the systems it stays unclear who has to act next, by when, and who notices when nothing happens. Today, emails, chats and personal follow-up bridge that gap. The Desk anchors this coordination in the task: with a goal, a responsible role, a deadline and a documented completion.

Do we have to replace existing systems?

No. The business systems keep their jobs: documents stay in the DMS or the file storage, orders and vouchers in the ERP, customer relationships in the CRM. The Desk works with their data and itself keeps only the task data and, if desired, the address book. For specialist work the business systems remain the workplace; the VAT return still belongs in accounting.

What does management get out of it?

It sees which work is open, who carries it and where a decision is missing: in «Who carries what», in «Dates» and in the ticket reports. Status requests by email fall away.

Does AI decide for us?

No. It reads, classifies, proposes and drafts. The Desk marks its proposals with «please check». Filing, assigning, approving and sending stay with your people. A person runs an AI plan with one click in their own name.

Where is our data?

The instance runs in Switzerland or on your premises. Mail stays in your mail system, files in your file storage. Whatever goes to the language model is processed by Anthropic for Claude, and by you yourself for a locally hosted model.

Does the Desk fit our systems?

Yes. The Desk is built like a computer with USB ports: the core with tasks, roles, deadlines and AI is in place, and the business systems are plugged in via connectors. Microsoft 365 and bexio are connected. For Google Drive, CashCtrl, Abacus or your DMS we build the matching connector, and the core stays the same.

What do our people gain?

Less searching, less double entry, fewer internal status emails. Responsibility, status and deadline stay with the task, and under «Waiting for you» each person sees their next action. Nobody has to switch to another system for every task.

Is the Desk another CRM or ERP?

No. Not an ERP, not a CRM, not a second file store. It runs task, responsibility and deadline and refers to documents and files in your systems.

Which language model does the Desk use?

Claude by Anthropic. In the interface you choose between Claude Opus 5.5 and Claude Sonnet 5.5. On request we switch to a model from OpenAI, another API provider or a locally hosted open-weight model; the effort is small. We recommend a frontier model, currently Claude Opus 5.5.

Does AI see more than I am allowed to see?

No. In the dialogue, AI reads files with the access of the person who is signed in. What someone may not open in the file storage, they do not get through an AI summary either.

Frequently asked questions

What happens if AI or a business system fails?

If AI fails, work continues by hand; rules, deadlines and history apply unchanged. If a business system fails, the Desk shows the error, and its data is missing until it is running again.

Does the Desk read our personal mailboxes?

Only if one is entered in the configuration, and then only the «Desk» folder below the inbox. The person decides what goes there.

How does the introduction work?

We set up the instance, connect your business systems and enter mailboxes, storage locations and roles. Your team then works with real tasks.

How does our team learn the Desk?

The manual is part of the Desk, in German and English, and every page leads to the matching chapter. «Ask the desk» answers questions about it with AI.

What happens if a transfer fails?

The error stays visible. The Desk never creates the same email twice. If a file fails when a proposal is accepted, the Desk says so, and the task stays created. «Run plan» stops at the first step that does not work.

What do we have to settle before the introduction?

Which system leads for which information, for example whether the address book sits in the Desk or in the CRM. Plus the roles: who claims or covers a task, who changes deadlines and who approves. AI cannot turn conflicting data sets into a valid one either.

Can we evidence our tasks in an audit?

Yes. Every action is recorded with person and time in the task's history; entries are only ever appended, never changed or deleted. Deadlines, handovers and approvals are recorded there, and a checksum chain additionally secures the AI log. The reports evidence response and resolution times met.

Do we get the source code?

On request, in two variants. As a backup copy for your business, updated twice a year; it is not intended for your own development. Or as a basis for your own development within your business, without resale. We support further development as a service on request.

EVERYTHING ON YOUR OWN PREMISES

Can we run everything on our own premises, including the AI?

Yes. The Desk runs as a container on your own infrastructure, and on request it works with an open-weight model on your own servers. Then even the inference never leaves your premises. If mail and files are also kept in your own systems, all data stays with you. The quality of the proposals then depends on the chosen model.