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.



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, with two lines from AI: what it is about and what comes next. Items without an email, such as scanned post, are recorded by hand.

Tasks with a goal.

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

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.

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.

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. A new email from a task is created as a draft too, in sales with the quote or invoice as a PDF.

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.

Sales in the task.

Quotes and invoices are created in bexio or CashCtrl, from within the Desk. Whoever sells works in the Desk and does not need to know their way around the accounting system.

Self-check and notification.

Staff confirm the controls of a check catalogue; deviations need approval. For notifications, the Desk tracks the deadlines.

In productive operation at two Swiss businesses.

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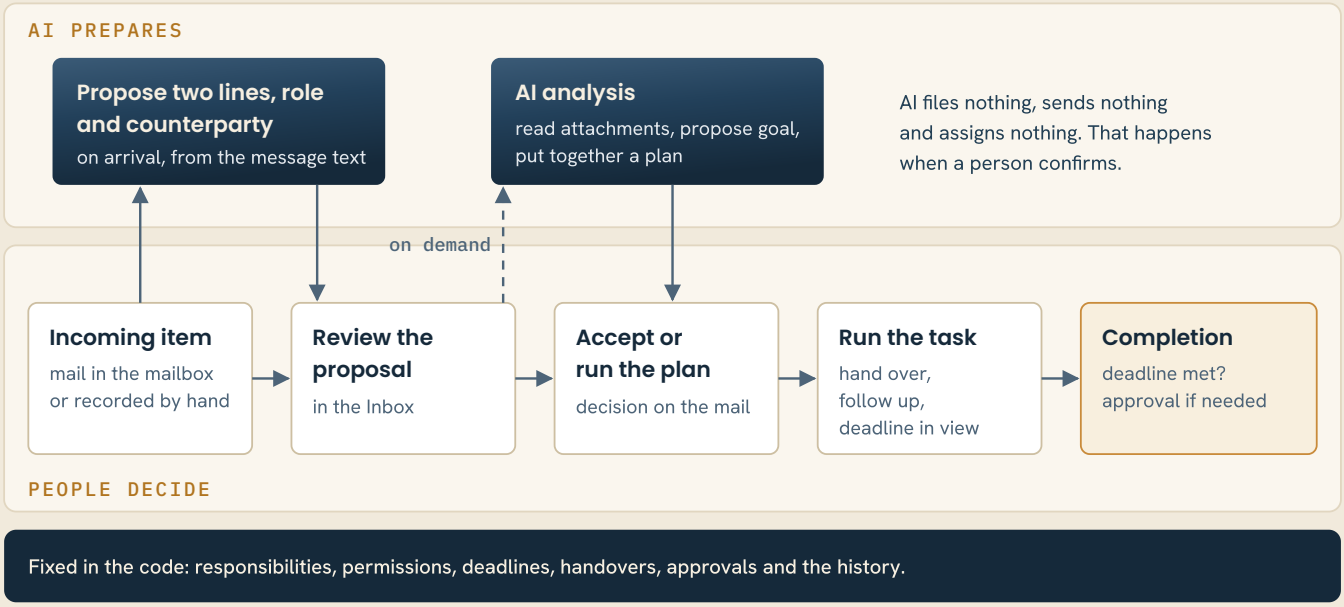
swiss made software +AI

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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, files and accounting documents.
- **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.

How the Desk works



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How the Desk works

01

Incoming mail becomes a proposal.

The Desk reads the approved mailboxes; items without an email, such as scanned post, are recorded in the Inbox by hand. When a message arrives, AI summarises it in two lines and proposes the responsible role from the message text, plus the counterparty from the address book. If the counterparty is missing, AI proposes a new entry. If a telephone assistant sends its call logs to a mailbox, the Desk matches the caller's number against the address book and proposes the counterparty. At the push of a button («AI analysis») it also reads the attachments (PDF, Word, PowerPoint, text files), proposes the goal and puts together a plan.



Inbox: proposal with two lines, role and counterparty from AI. Sample data.

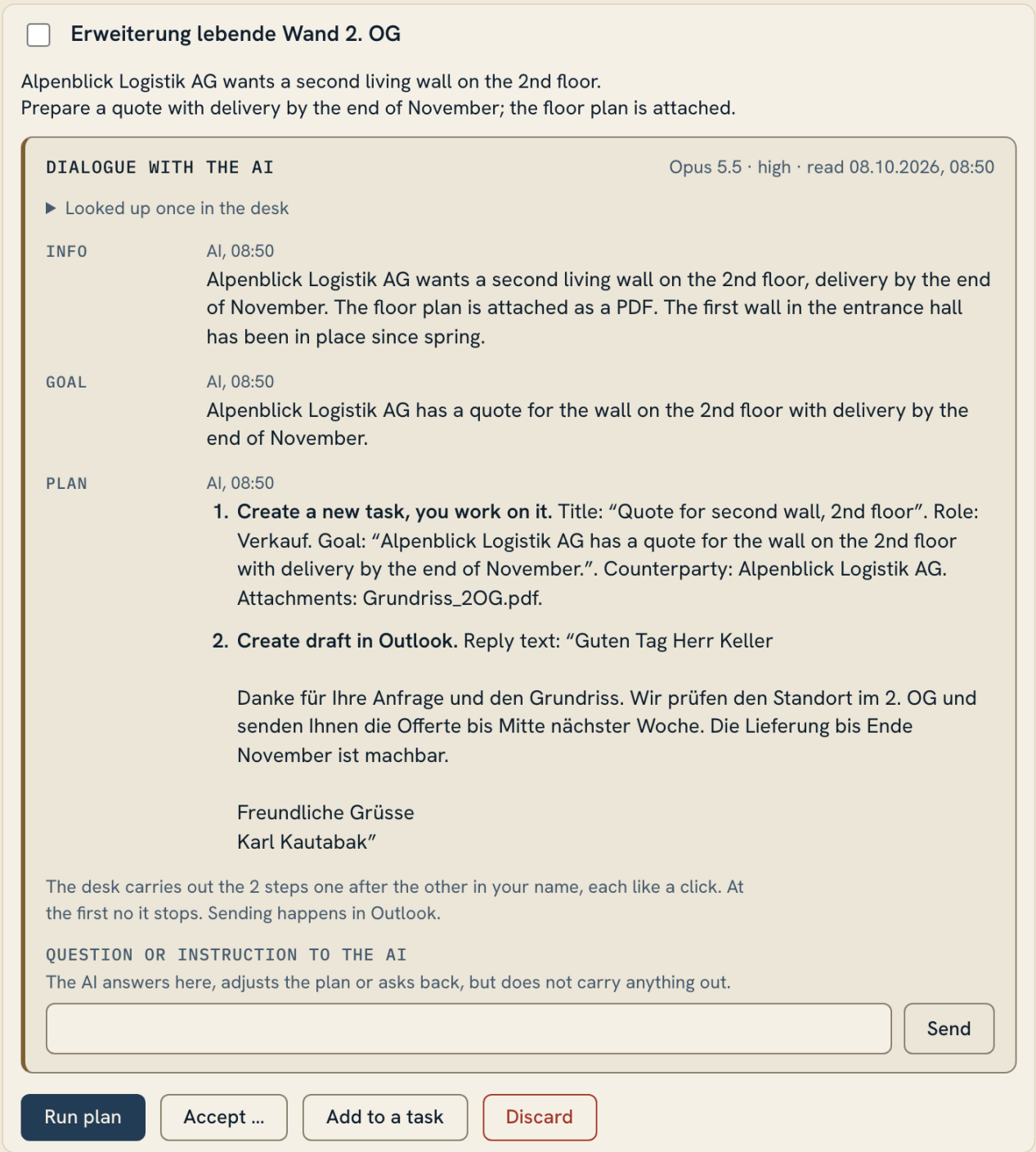
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02

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. Several incoming items can be discarded at once. A sender whose messages are always discarded can be set aside by the person in charge; the rule applies per mailbox and can be lifted. On request, the Desk moves decided messages into two folders of their own in Outlook.



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

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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.

Task with goal, responsibility, deadline and history. Excerpt, shortened. Sample data.

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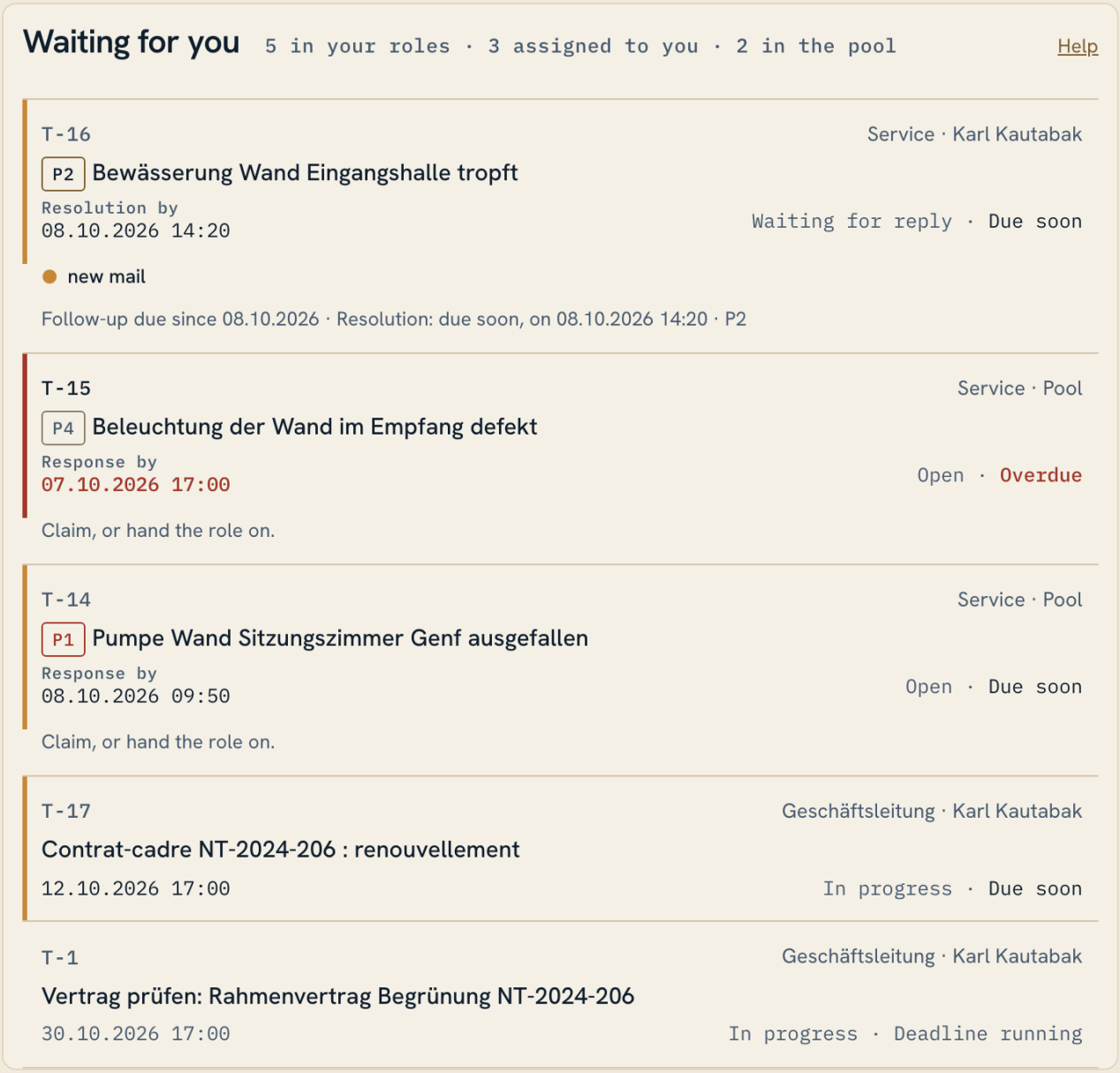
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Overviews

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

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

Who carries what: open work per person and role.



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

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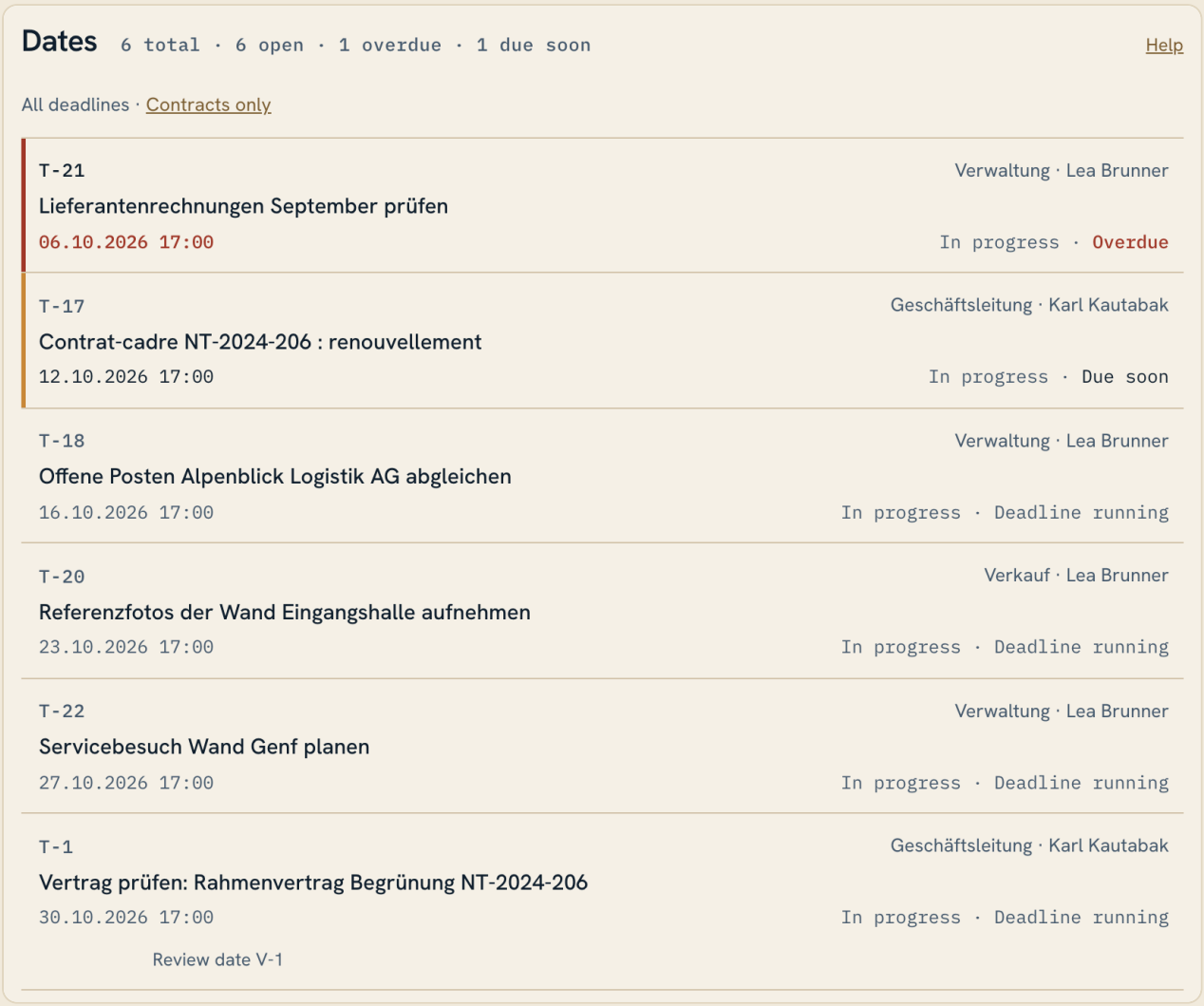
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Overviews

Dates: the open deadlines of tasks in date order, on request only the review dates of contracts. The deadlines of a notification are shown here too; ticket times are shown under Tickets.

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: the open deadlines of tasks. 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	Resolution
07.10.2026 17:00	19.10.2026 17:00
overdue	open

P1 T-14 — Open — Service · Pool

Pumpe Wand Sitzungszimmer Genf ausgefallen

Léman Consulting SA · V-1

Response	Resolution
08.10.2026 09:50	08.10.2026 15:50
due soon	open

P2 T-16 — Waiting for reply — Service · Karl Kautabak

Bewässerung Wand Eingangshalle tropft

Alpenblick Logistik AG

Response	Resolution
07.10.2026 18:20	08.10.2026 14:20
met	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

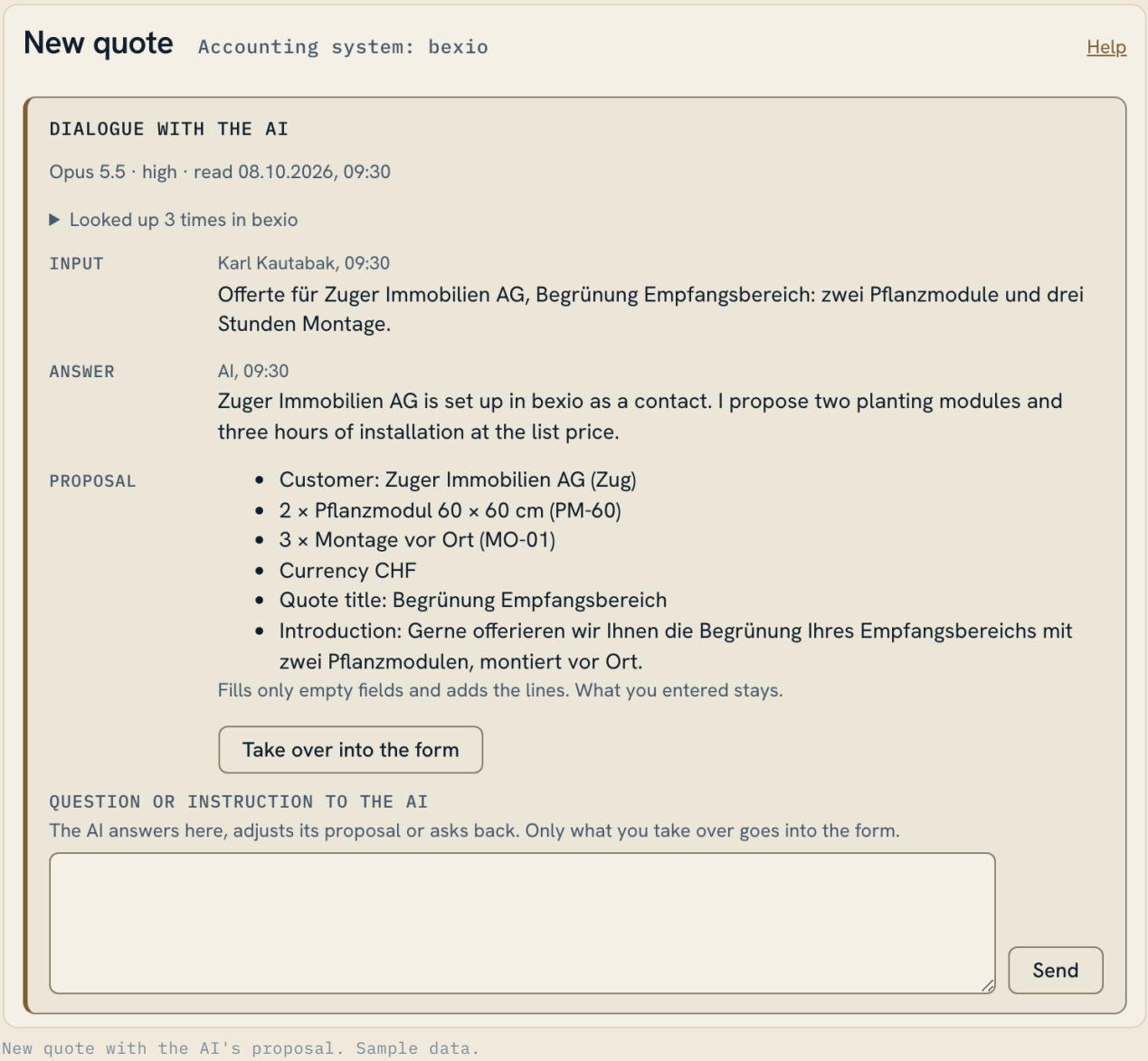
Contract with annexes, versions and review date. Excerpt, shortened. Sample data.

Sales

Quote and invoice from the task: A sale is a task with an accounting document. The quote is created in the accounting system (bexio or CashCtrl), with items from its catalogue or with free line items. The Desk runs the task and keeps a reference to the document.

AI in sales: AI searches for contact and items in the accounting system, proposes line items and the next steps and asks back when something is missing. It sets a price only when the person names one. Nothing is created until a person clicks. Before an invoice, the Desk asks for a separate confirmation, because an invoice cannot be undone in the Desk.

Without an email, too: «New quote» and «New invoice» create a document without a preceding email. The task is created as soon as the document exists in the accounting system.



New quote with the AI's proposal. Sample data.

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Sales

Sent as a draft: The Desk fetches the PDF fresh from the accounting system and attaches it to a draft in the mailbox. It is sent from your mail program.

The accounting system calculates: Currency, tax and invoice number go to the accounting system as entered. If it rejects something, its answer is shown word for word. The Desk stores neither line items nor PDF.

Stages up to the invoice: Quote created, sent, accepted or declined, invoiced, invoice sent. The invoice takes over the line items of the accepted quote. Whether it has been paid is shown in the task as the accounting system records it.

Documents

Stage: Invoiced, since 02.10.2026

Quote AN-00001

Date	Status	Currency
22.09.2026	Accepted	CHF

Text	Quantity	Net price	VAT
Pflanzmodul 60 × 60 cm	4	CHF 480.00	MWST 8.1%
Montage vor Ort	6	CHF 120.00	MWST 8.1%
Wartung lebende Wand, Jahrespauschale	1	CHF 1'800.00	MWST 8.1%
Total net		CHF 4'440.00	
VAT		CHF 359.64	
Total incl. VAT		CHF 4'799.64	

Invoice RE-00001

Date	Status	Currency	Due	Outstanding
02.10.2026	Open	CHF	01.11.2026	CHF 4'799.64

Text	Quantity	Net price	VAT
Pflanzmodul 60 × 60 cm	4	CHF 480.00	MWST 8.1%
Montage vor Ort	6	CHF 120.00	MWST 8.1%
Wartung lebende Wand, Jahrespauschale	1	CHF 1'800.00	MWST 8.1%
Total net		CHF 4'440.00	
VAT		CHF 359.64	
Total incl. VAT		CHF 4'799.64	

> Number, taxes and amounts come from bexio. If something is wrong, sort it out there with accounting; “Reload documents” then shows the new state.

Help

Documents on the task: stage, quote and invoice. Sample data.

Compliance

Self-check per person: A check catalogue is imported. Whoever may assign starts a self-check for the people of a role, as a monthly check or a baseline check. Each person records their devices and confirms control by control. The evidence stays with them; the Desk holds the confirmations.

Evidence: The overview shows the status and the deviations per person, one column per control. The evidence can be exported as an Excel file.

Hits from a monitoring system (optional): If a connected monitoring system reports a vulnerability by email, the Desk reads it with a fixed reader, without AI, and shows type, product, identifier and severity on the task. If the vulnerability is actively exploited, the Desk points to checking the duty to notify.

Deviation with approval: «Not met» requires a reason and a date for the fix. The fix is approved by another person with the right to do so, never by the person checked.

Notification with deadlines (optional): For a notification under Art. 14 of the Cyber Resilience Act, the Desk runs a dedicated task with points in time and reporting deadlines. The person in charge records a deadline as met only with evidence; the notification itself counts as met at the point in time it was submitted. AI sets none of these steps.

Overview person × control

Person	COMPUTER		MOBILE PHONE	CONDUCT	Status
	AP-01	AP-02	AP-03	AP-04	
Karl Kautabak **T-24**	✓	✓	✓	·	1 of 4 open
Nina Graf **T-25**	✓	↻	✓	✓	0 of 4 open
Timo Huber **T-26** Deviation T-27 OPEN	✗	✓	↻	✓	0 of 4 open

✓ met · ↻ met after fixing · ✗ not met · ○ not applicable · – no device of this type · · open. Several devices: the worst result counts, details in the task.

Evidence as Excel file

Per person, device and control: result, time, catalogue version, plus the deviations with lock and approval.

Self-check: overview per person and control. Sample data.

Compliance

CASE	Actively exploited vulnerability
BASIS	CRA Art. 14
PRODUCT AND VERSION	Bewässerungssteuerung NT-Flow 2.4.1
MEMBER STATES	DE, FR, IT
EXERCISE	no
REFERENCES	none

Change details

Points in time

First indication 07.10.2026 10:40

Awareness 07.10.2026 13:00 · Karl Kautabak

Fix available *not yet set* — Record fix available

Notification submitted *not yet set* — Record notification submitted

Intermediate report requested *not yet set* — Record intermediate report

Users informed *not yet set* — Record users informed

Reporting deadlines

Early warning · 24 h

due 08.10.2026 13:00 · met on time · 07.10.2026 18:20 · reference SRP-2026-004217 · Karl Kautabak

Notification · 72 h due 10.10.2026 13:00 · open — Met by «Notification submitted».

Final report · 14 days *starts with «Fix available»*

Add reference

The AI cannot set these points in time and cannot record a reporting deadline as met. Its preview reports these steps as blocked.

Notification with points in time and deadlines. Sample data.

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AI and fixed rules

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

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.

Dialogue log with checksum chain. Sample data.

The desk answers from this manual and also knows your name, your roles and rights, the other persons with their roles and the rights of each role. Your last question and its answer stay here for you for up to 24 hours, also in another browser, until your next question or until you sign out.

YOUR QUESTION

How do I accept a proposal?

Ask

You hold the role «Verkauf», so you see and decide its proposals.
Open «Accept ...» on the card. 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» all attachments are ticked; untick what should not go into the task.
Then click «Accept for myself» or «Hand to the role».
With AI, you review the plan instead and carry it out with «Run plan».

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

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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, plus the «Sent» folder where the Desk may create drafts; for personal mailboxes only the «Desk» folder; attachments	drafts in the shared mailbox (reply or new email); on request moves decided messages from the inbox into two folders of their own; never sends
File storage	SharePoint, on request Google Drive	approved libraries and folders, search, preview	only the task library
CRM / ERP	bexio and CashCtrl, on request Abacus	contacts for the address book, with a preview before import; items; documents with status, total and line items, also as PDF	quote and invoice; contacts; the outcome of a quote (accepted, declined, reverted); deletes a quote that a person undoes; 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. From Claude, a proposal can also be placed in the Inbox. It only becomes a task once someone accepts it in the Desk.

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Integration and operation

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, reply texts and the AI log, plus references to mail, files and accounting documents, rules for senders, self-checks, notifications and reported bugs and ideas. Of a new message it keeps a short excerpt and, until the decision, the two lines from AI. Of an accounting document it keeps the reference, and for «New quote» and «New invoice» also the total in the history. Mail stays in the mailbox, files in the file storage, quotes and invoices in the accounting system.
- For proposals, analyses and questions, message content, attachments and the necessary details from tasks, contracts, files and the address book go to the language model. In sales, contacts, items and documents from the accounting system are added. For questions about the manual, the names of the active people with their roles and permissions are included; for call logs, their names. 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, response and resolution times, confidentiality, check catalogues, the accounting system for sales, the AI model and model prices.
- Interface and AI texts in German and English, selectable per person.
- Signing out ends the session on all devices.
- Telephone directory (optional): if the address book does not know a caller's number, the Desk can look up a Swiss number in a public telephone directory. For this, the number goes to that service. Without configured access, nothing leaves the Desk.
- Security review: on 25.10.2026 the Desk was reviewed for attack paths in a dedicated run, including a comparison against the OWASP ASVS 5.0 catalogue, level 2. Seven findings were confirmed and have been fixed.
- 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.

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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. This also applies to quotes and invoices.

Where is our data?

The instance runs in Switzerland or on your premises. Mail stays in your mail system, files in your file storage, quotes and invoices in your accounting system. 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, bexio and CashCtrl are connected. For Google Drive, 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 and set how thoroughly AI works in the dialogue. 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.

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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.

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. If the accounting system does not respond in time to a quote or invoice, the order stays open until a person has clarified it. The Desk does not repeat anything by itself.

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.

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.

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.

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.

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 and knows the roles and permissions of the person asking. The manual shows the running version and what changed with each version. Staff report bugs and ideas directly in the Desk.

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, files and the accounting system are also kept in your own systems, all data stays with you. The quality of the proposals then depends on the chosen model.

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Book an initial consultation
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