

Runbook: using the desk each day

Sample document. The business, people and figures are fictional, made up to show the format of a Teknetik runbook. It is written for Sam, the sample firm's office manager, and for whoever covers when Sam is away.

What the desk is for

The desk is one list of every new enquiry, already read and sorted. For each one, it shows what the customer wants, what is missing and a reply ready for you to check. That reply is a short AI draft when details are missing, or the firm's own wording when they aren't.

Nothing is sent and no job is created until you approve it. You stay in charge of every reply. The desk does the sorting, drafts the replies that chase missing details, and copies approved jobs across. The reading and checking are still yours.

The four tabs

TAB	WHAT'S IN IT
Waiting for you	Cards that need your decision: safety first, then urgent, then oldest
Manual queue	Cards for a person to handle the usual way, each with the reason: safety first, then urgent, then oldest
Waiting for customer	Cards where you've asked the customer for details. Their reply joins the card. If they never reply, open the card and choose Close it: no reply from the customer , with a note if you like.
Done	Finished: reply sent, job created, declined, archived or handled

Your daily routine

The office aims to reply to enquiries the same working day. We suggest you check the desk at these times:

- first thing in the morning (enquiries from overnight will be waiting)
- late morning
- after lunch
- an hour before closing, to clear anything left

At each check:

1. Open the desk. It shows **Waiting for you**.
2. Work from the top. The desk already sorts it for you (see the next section).
3. Look at the **Manual queue** as well, in case anything has landed there.
4. Before you finish for the day, make sure nothing urgent or safety-related is still waiting.

The order to work in

The desk sorts **Waiting for you** in this order. Work down it in the same order.

1. **Safety: phone now** (red). Someone has mentioned a gas smell or a carbon monoxide alarm.

2. **Urgent.** An active leak, or no heating or hot water where someone vulnerable lives (elderly, very young or unwell). The card says "Urgent: phone [number] today".
3. **Everything else, oldest first.**

Opening a card

The customer's message is on the left. If they have written more than once, you see the whole conversation. On the right:

- **What the workflow did:** the route it chose and why.
- **Job card:** the AI's reading of the message, with anything missing marked. For a website form it says "Copied from the form, no AI".
- **What the rules found:** earlier messages, the postcode, safety, urgency, any instructions inside the message, the reply address if the message mentions a different one, and photos. These are fixed rules, not AI. Replies always go to the sender's own address.
- **Your decision:** the reply, its five draft checks and your buttons.
- **Audit trail:** everything that has happened so far.

The desk records when you first open a card and when you decide, for the report. You don't need to do anything.

Always read the original message first. The job card is the AI's reading of it, and it can be wrong. If the card and the message disagree, the message is right.

What the labels on the card mean

LABEL	WHAT IT MEANS	WHAT YOU DO
Safety: phone now	A gas smell or CO alarm was mentioned. No draft is written. The firm's fixed safety message is shown, and it can't be edited.	Phone the customer now, before anything else. Then choose Send the safety message so they also have it in writing.
Ask for details	An AI draft asking only for the details that are missing	Check it against the original. Approve it, or edit it and send. The card then moves to Waiting for customer .
Ready to book	Every detail is there. A standard acknowledgement is ready, with no AI draft.	Check the job card against the message, then approve. The reply is sent and the job is created.
Complete form	A website form with every detail filled in. A standard acknowledgement, with no AI used at all.	Check it and approve it. The reply is sent and the job is created.
Outside the area	The postcode doesn't start DN15, DN16 or DN17. A standard polite decline.	Check the postcode in the original message yourself before you approve.
Not a service we offer	Work the firm doesn't do, such as oil or LPG boilers, commercial premises, blocked drains, or bathroom or kitchen refits. A standard decline.	Check the original message, then approve the decline.
Not an enquiry	Looks like a sales pitch or spam. No reply is suggested.	Check it isn't from a customer, then choose Archive it . If it is from a customer, choose It is an enquiry: move it to the manual queue .

LABEL	WHAT IT MEANS	WHAT YOU DO
For the office	An invoice query, a complaint or an existing job. It goes straight to the manual queue, with no draft.	Deal with it yourself, as before, then mark it as handled.
Manual queue	The workflow didn't sort it, and the card says why	See "The manual queue" below

A card may also be marked **Urgent**. An urgent "Ready to book" acknowledgement tells the customer the office will phone as soon as it can during opening hours.

Your choices on a waiting card

BUTTON	USE IT WHEN	WHAT HAPPENS
Approve and send	The reply is right as it stands	It goes from the shared address. For "Ready to book" and "Complete form", the job is also created in the job system. For "Ask for details", the card moves to Waiting for customer .
Send my edited reply	You've changed the wording	The button changes to this as soon as you edit. Your edits get the same checks as the draft: no prices, dates, times, engineer names or promises.
Reject this draft	The draft shouldn't be used at all	It asks why. Your reason goes in the audit log, and the card moves to the manual queue. Nothing is sent and no job is created.
Handle it myself	It's better dealt with outside the desk, for example by phone	The card moves to the manual queue. Deal with it the way you did before the pilot.

The reasons you give when you reject a draft, and the notes you add when you mark a card as handled, are useful. We read them at each monthly review to improve the workflow.

When a job is created, check it in the job system once. Don't type it in again.

When the customer writes again

A new message from the same email address or phone number, within 14 days, joins the customer's open card instead of making a new one. A card is open while it is waiting for you, in the manual queue or waiting for the customer. The whole conversation is then read again:

- If every detail is now there, the card becomes **Ready to book** with a standard acknowledgement. Approving sends it and creates the job.
- If something is still missing, a new draft asks for it.

If a person has already taken the card over (with **Handle it myself** or **Reject this draft**, or because it is **For the office**), the new message joins the card but the card stays in the manual queue with that person. No AI is used. The rules still flag a gas smell or an urgent job, so check the card.

If a new message arrives while you have a card open, approving it is refused and nothing is sent. Look at the card again: it now includes the new message.

A message that arrives after a card is **Done** starts a new card. "What the rules found" then shows that the customer has been in touch before.

What the draft checks mean

Every reply gets five checks before it reaches you. No AI is involved in the checks: they are fixed rules, and they update as you edit.

CHECK	IT PASSES WHEN THE REPLY...	IF IT DOESN'T
Only approved facts	doesn't name an engineer, claim an accreditation, suggest another firm or give a phone number that isn't approved	Fix if it names an engineer; Check for the rest
No invented commitments	has no price, day, date, time, booking, confirmation or guarantee	Fix
Information handled properly	doesn't ask for a date of birth, bank or card details, or anything else the firm doesn't need	Fix
Clear next action	tells the customer what happens next, in 120 words or fewer	Check
A person approves it	has been approved by you	You, until you approve

Each check shows one of four labels:

LABEL	WHAT IT MEANS
Pass (teal outline)	The check passed.
Check (grey)	Worth a look. It doesn't stop you sending.
Fix (red)	The check failed. Fix the reply, or tick "I've checked this" to send it anyway.
You (dashed)	Waiting for a person to approve it.

The firm's approved wording doesn't trip the checks: the office hours ("Monday to Friday, 8am to 5pm"), "opening hours", "same working day" and the gas emergency number (0800 111 999).

"What the rules found" uses the same labels. There, **Fix** marks a gas smell or a postcode outside the area, and **Check** marks something to read carefully, such as earlier messages, urgency or instructions inside the message.

When a check says Fix

A Fix doesn't mean something has gone badly wrong. It means the reply needs your attention before it can go.

1. Read the reason shown beside the check.
2. Read the reply against the original message.
3. Then do one of these:
 - **Edit** the reply to fix the problem, for example by removing a day or a time. The check updates as you type.
 - **Reject this draft** and write your own reply.
 - **Handle it myself** if a phone call would be better.
4. To send it as it stands, you must first tick "**I've checked this**". Only tick it when you really have checked it and you are happy with every word. The tick is recorded in the audit log with your name, and we count these in the monthly care report.

Never tick the box just to clear the red. If the same check keeps failing, tell us.

The manual queue

The **Manual queue** tab holds cards for a person to handle the usual way. Each one shows the reason:

- **The workflow was paused** when it arrived.
- **The AI was unavailable.** For example, the supplier timed out or returned an error.
- **The message was empty.**
- **For the office:** an invoice query, a complaint or an existing job.
- **You or a colleague chose** "Reject this draft", "Handle it myself" or "It is an enquiry".

To deal with one, read the original message and reply from the shared inbox, phone the customer, or type the job in, just as you did before the pilot. Then choose **Mark as handled**, with a short note of what you did if you like. Nothing in the manual queue is lost: the original email is always in the shared inbox too.

If a card is there because the AI was unavailable, the workflow was paused or the message was empty, it also shows **Run the workflow again**. Use it once the problem has passed. The card is read again and either comes back to **Waiting for you** or stays in the manual queue with a new reason.

Pausing the workflow

Pause the workflow whenever you aren't comfortable with what it is doing. You don't need anyone's permission.

1. Open **Settings**.
2. Choose **Pause the workflow**.
3. From now on, every new enquiry goes straight to the manual queue, untouched by AI. This is the old way of working. The fixed rules still flag a gas smell or an urgent job, and those go to the top of the manual queue. Cards already on the desk stay where they are, unless the customer writes again: then their card moves to the manual queue too.

To start again, open Settings and choose **Resume the workflow**. Cards that arrived while it was paused stay in the manual queue. Open each one and choose **Run the workflow again**, or handle it by hand.

Then tell the owner and us why you paused it. 05-rollback explains how to switch everything off completely.

If sending fails

If the mailbox connection stops working, approving fails safely. The card shows an error, nothing is sent, the card stays in **Waiting for you** and no job is created. Approve it again once the connection is fixed. 04-exceptions (section 7) explains what to do.

What the desk will not do

- send a reply or create a job without a person approving it
- send anything on its own, in or out of office hours
- move or delete emails in the shared inbox

Drafts are told never to include prices, quotes, visit dates or times, engineer names or guarantees, and never to ask for anything that isn't on the firm's list. The checks flag a reply that does. You are the final check.

When you're away

Your cover approver, [named at handover], has their own desk login. Before a holiday, check that they can log in and that they have read this page.

Who to contact

FOR	CONTACT
Anything about the job, the customer or the firm's policy	The owner, [named owner]
Something unusual in the desk	See 04-exceptions first
A question or a change to the workflow	Teknetik, carl@teknetik.co . Under care, we acknowledge requests within two working days. Not an emergency line.
