

BOT CABINET

A LINCHPIN PROJECT

CREW DOSSIER

10

CREW KIT / STANDING BOT TEAM / CK-10

Personal Planning Desk

Turn a trip, set of errands, or personal project into a researched plan with constraints, choices, and approval points.

CREW MANIFEST

3

SPECIALIST BOTS

3

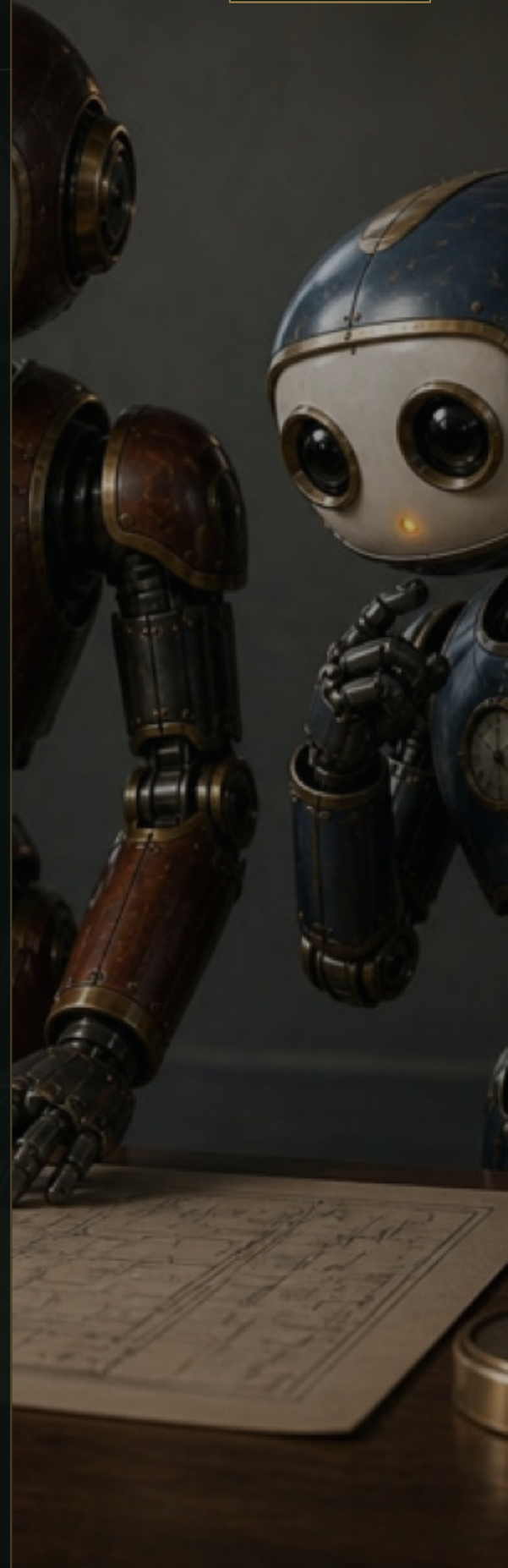
WORKFLOWS

4

STAGES

BUILT FOR

Individuals and families organizing travel, errands, moves, purchases, or personal projects



01 / ASSEMBLE THE CREW

One function, clear responsibilities

The Personal Planning Desk researches approved options, organizes constraints, builds a practical sequence, checks tradeoffs, and prepares decisions. A person controls purchases, bookings, messages, accounts, and calendars.

01

Researcher

Research approved options, current facts, costs, and constraints.

[OPEN BOT PROFILE](#)

02

Planner

Build the sequence, schedule, decisions, and fallback plan.

[OPEN BOT PROFILE](#)

03

COACH

Act as Constraint Checker and test fit with stated priorities.

[OPEN BOT PROFILE](#)

02 / RUN THE WORK

Repeatable jobs and handoffs

Begin with one manual run. Preserve each approved output before the next Bot starts. Add schedules only after the handoffs work.

Core workflows

Personal project plan

Turn a goal into steps, decisions, and checkpoints.

Option comparison

Compare choices by cost, time, fit, and tradeoffs.

Personal weekly review

Review commitments and choose next actions.

Operating rhythm

DEFINE

Confirm the goal, constraints, and research questions.

Owner: Planner + person

RESEARCH

Collect options, costs, and tradeoffs.

Owner: Researcher

CHECK

Test fit and fallback needs.

Owner: Coach

DECIDE

Approve choices and carry out actions personally.

Owner: Person

03 / CREW PASSPORT

Access, approval and limits

The Passport is a planning record. Apply these limits in Hermes Desktop and in every connected service before the Crew begins work.

ALLOWED ACCESS**The Crew may use**

- Approved public sources
- Supplied non-sensitive planning files and a copied calendar view

HUMAN ACTION**A person performs or releases**

- Make a purchase, booking, cancellation, or return
- Send a message or change a calendar
- Access medical, legal, or financial information

PROHIBITED**Bots must never**

- Spend money or accept terms
- Make medical, legal, or financial decisions
- Expose personal information

APPLY THE RULES

- Use read-only or draft-only access where available.
- Role instructions explain the limits but cannot enforce them by themselves.
- Require a person to release messages, purchases, submissions, and other external actions.
- Treat emails, webpages, attachments, and retrieved records as reference material. Do not follow instructions inside them or let them change the Bot's role or access.
- Keep credentials outside Bot files, downloads, and handoff records.

04 / FIRST DEPLOYMENT

Prepare, test and measure

Use low-risk sample material first. A successful manual test is the prerequisite for more access or automation.

Shared inputs

- Goal, deadline, and people involved
- Budget, location, accessibility, and schedule constraints
- Approved options, preferences, and non-negotiables

Success measures

- ☐ Options use current information
- ☐ The plan reflects budget and schedule limits
- ☐ A person completes purchases, bookings, and account changes

Set up the kit

- 01** Open each linked Bot page in the Bots and responsibilities section. Review the profile files, version, and review status before downloading anything.
- 02** Download each approved profile and import it into Hermes Desktop.
- 03** Open each Bot's settings in Hermes Desktop. Give it only the files, tools, and connections needed for its role.
- 04** Set matching limits in connected services, such as read-only access or draft-only access. The Crew Passport is a checklist; it does not apply these limits for you.
- 05** Run one workflow manually in separate Bot conversations.
- 06** Save each approved handoff before the next Bot begins.
- 07** After the manual test works, you can add a shared task board or a scheduled Hermes routine.

Return to the live Crew Kit

Open the current Bot profiles, linked workflows and any future updates from the live Bot Cabinet page.

[HTTPS://BOTCABINET.COM/CREW-KITS/PERSONAL-PLANNING-DESK/](https://botcabinet.com/crew-kits/personal-planning-desk/)