ROUND INFINITY

FOR RETAIL, COMMERCIAL AND DIGITAL BANKS

Move your bank operations to agentic.

AI agents complete requests, trace payments and draft disputes inside your risk rules. Your people approve what matters.

01	**Requests completed, not redirected**	02	**Disputes drafted inside deadlines**	03	**Every regulatory clock on time**



Round Infinity, Inc.

From manual to agentic.

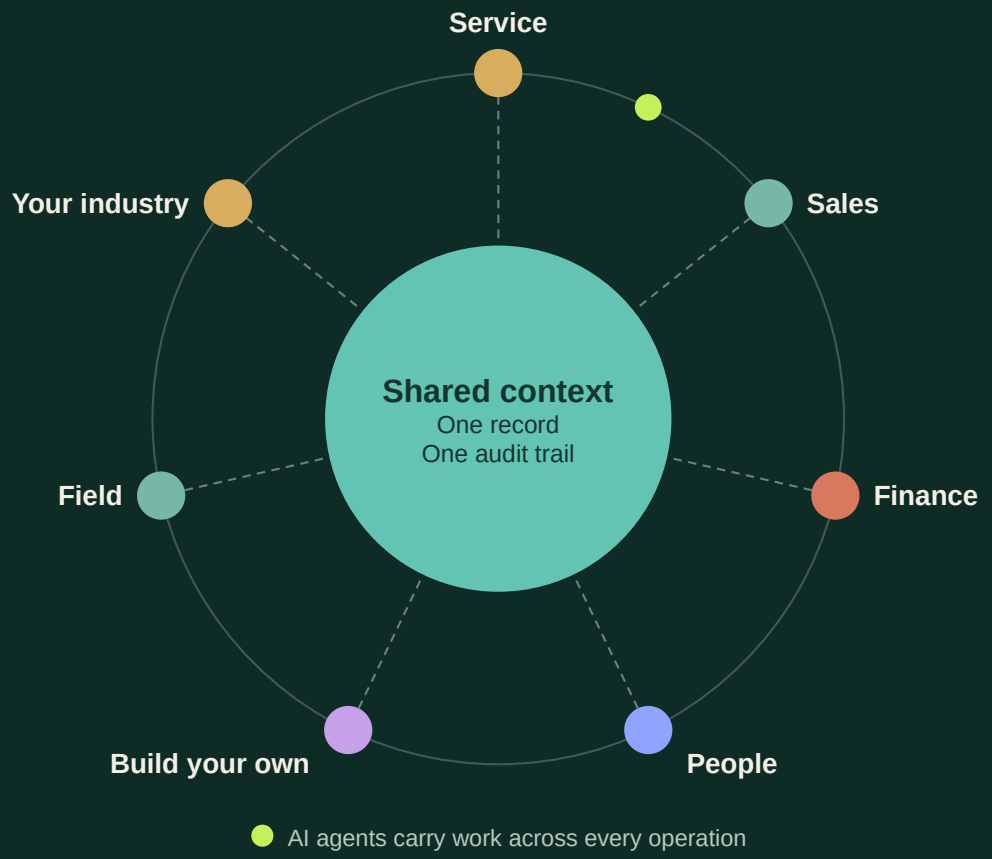
TODAY		WITH ROUND INFINITY
Customers get another link instead of an answer	→	AI completes eligible requests in the conversation
Every channel restarts the story	→	One case carries context across channels and branches
Payment traces chased by email	→	Traces and recall messages drafted across rails
Regulatory clocks tracked in spreadsheets	→	Every complaint gets its clock and a drafted response



Every operation on one shared context.

Your industry's workflows and your core operations run on one shared context. An agent that picks up a task sees every customer, case, contract and payment it touches, and acts across your systems.

One record	Customers, documents and decisions stay connected.
One audit trail	Every action, by an agent or a person, is recorded.
AI agents that act	They prepare, decide within limits and hand off.
People in control	Approvals sit where judgment matters.



One customer journey, end to end.

Five steps. Pack apps hold the work, AI agents do it, people decide, and a Round Infinity use case completes each step.

01 ONBOARD

Open accounts with KYC done once

AI AGENT

Customer Onboarding

Reads ID, pre-fills forms and explains what is missing.

APP Accounts, Cards & Loans 360

PEOPLE Bankers approve exceptions.

USE CASE **KYC & Onboarding**

→

02 SERVE

Complete card, account and profile requests instantly

AI AGENT

Banking Service

Verifies the customer and completes eligible requests end to end.

APP Servicing Actions

PEOPLE Staff take what needs judgment.

USE CASE **Service**

→

03 INVESTIGATE

Resolve payment traces and disputes on time

AI AGENT

Payment Investigation · Dispute Resolution

Builds the case, drafts the trace or chargeback with evidence.

APP Payment Investigations · Card Disputes

PEOPLE Operations approves each outcome.

USE CASE **Financial Close**

→

04 RESOLVE

Handle every complaint inside the regulatory clock

AI AGENT

Complaints

Classifies complaints, starts the clock and drafts responses.

APP Complaints & Regulatory Register

PEOPLE Complaint handlers sign the final response.

USE CASE **Legal Operations**

→

05 GROW

Confirm the outcome and offer the next product

AI AGENT

Banking Service

Confirms the outcome and surfaces reviews and next-best offers.

APP Relationship Manager Workbench

PEOPLE Relationship managers make the call.

USE CASE **Sales Execution**

04 PROTECT

Every alert, already summarized.

The Fraud Operations Support agent assembles the case and recommends an action. Your analysts make the decision.

- Transaction history
- Device signals
- Customer profile
- Recommended action
- Drafted verification message

POWERED BY

BANKING PACK — Fraud operations · Support agent

+ USE CASE — KYC & Onboarding

PREPARED BY AI AGENT

Illustrative

Fraud alert · card ending 7731

Today 14:22 · risk score high · customer since 2016

TRANSACTIONS	3 online purchases abroad in 9 minutes
DEVICE	New device · first login from this country
PROFILE	No travel notice · usual spend under 200
HISTORY	No prior fraud cases on this customer

RECOMMENDED ACTION

Block the card temporarily and verify by SMS

Analyst decides · customer message drafted

Six banking agents. Each with a partner.

AGENT 01

Banking Service

Completes card blocks, limits, statements and address changes after authentication.

+ Service

AGENT 02

Customer Onboarding

Reads ID and address proofs, pre-fills forms and explains what is missing.

+ KYC & Onboarding

AGENT 03

Payment Investigation

Traces payments across rails and drafts recall messages to counterparties.

+ Service

AGENT 04

Dispute Resolution

Classifies by reason code, gathers evidence and drafts chargebacks.

+ Financial Close

AGENT 05

Fraud Operations Support

Summarizes alerts with history and device signals; analysts decide.

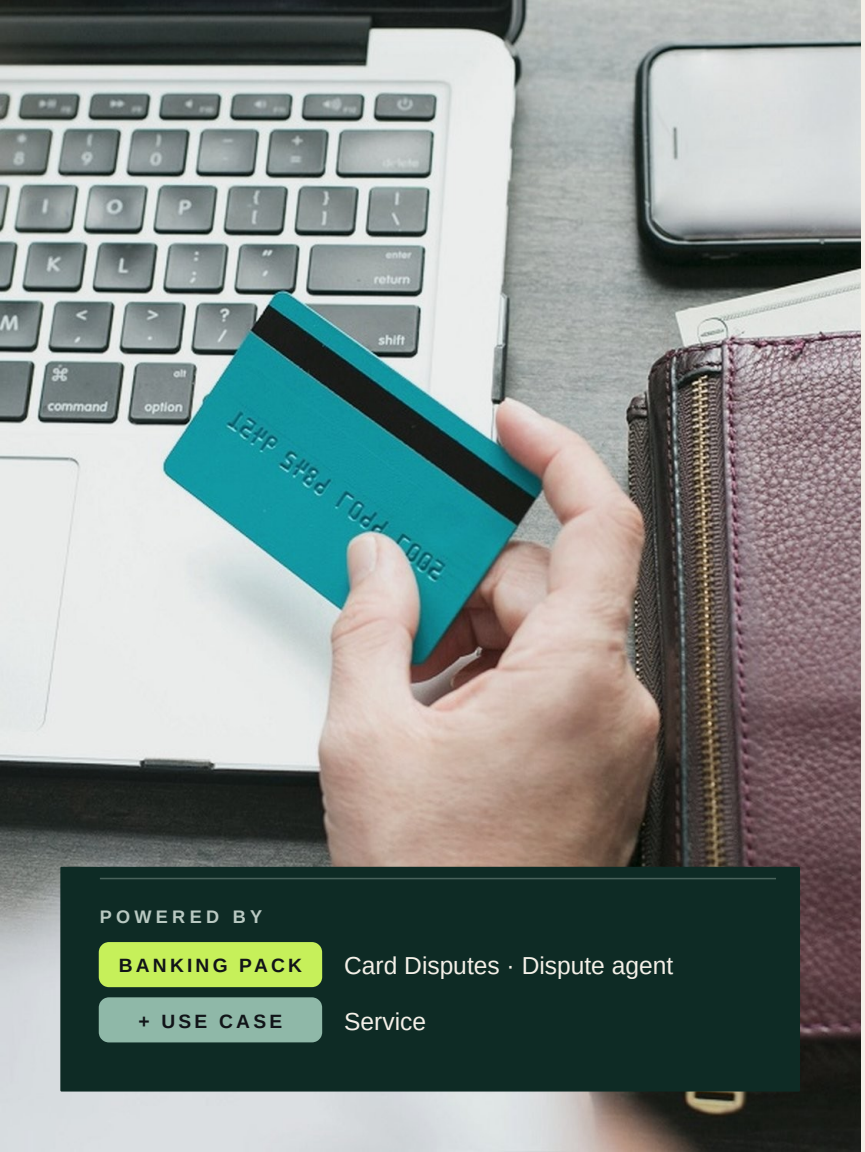
+ KYC & Onboarding

AGENT 06

Complaints

Classifies complaints, sets the regulatory clock and drafts responses.

+ Legal Operations



POWERED BY

BANKING PACK — Card Disputes · Dispute agent

+ USE CASE — Service

06 INVESTIGATE

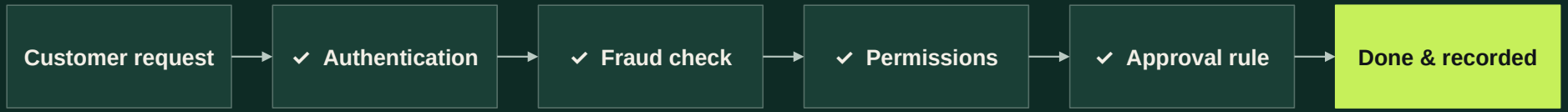
Disputes inside their deadlines.

AI classifies the dispute, gathers the evidence and drafts the chargeback. Your analyst approves; the clock never slips.

ACTIVITY · CARD DISPUTE D-20931 *Illustrative*

09:10	CUSTOMER	Disputed a 412.00 charge in the app
09:10	AGENT	Classified: goods not received · deadline set
09:12	AGENT	Gathered transaction and merchant evidence
09:13	AGENT	Drafted chargeback and provisional credit
09:40	ANALYST	Approved chargeback and provisional credit
09:41	AGENT	Customer updated in the app
14:05	AGENT	Merchant reply received · response drafted

Sensitive requests. Every control in place.



Serve

After authentication, the Banking Service agent completes eligible card, account and profile requests through approved core-banking actions, then confirms them and records every step.

POWERED BY

BANKING PACK — Servicing Actions · Service agent

+ USE CASE — Service

Resolve

Complaints from any channel are classified by product and regulatory category. The clock starts automatically and the final response is drafted for review.

POWERED BY

BANKING PACK — Complaints Register · Complaints agent

+ USE CASE — Legal Operations

Six applications, built for banking.

Accounts, Cards & Loans 360
Balances, products, mandates and history

Servicing Actions
Policy-checked actions on accounts and cards

Payment Investigations
Traces, recalls and returns across rails

Card Disputes & Chargebacks
Reason codes, evidence and deadlines

Complaints & Regulatory Register
Classification, root cause, regulator timelines

Relationship Manager Workbench
Portfolio, reviews and opportunities



Use cases that complete the picture.

All sixteen run on the same record, users and audit trail as the Banking pack.

● In the Banking pack

FINANCE

- **Accounts Payable**
  Vendor invoices matched, approved and paid.
- **Procurement**
  Bank purchasing with budget control.

Accounts Receivable
Lower DSO, more cash collected

- **Financial Close**
  Write-offs, reconciliations and audit evidence.

PO to Cash
Clean orders, fewer delays

Travel & Expense
Policy enforced before money leaves

CUSTOMERS & REVENUE

- **Service**
  Requests resolved across every channel and branch.

Appointment Scheduling
Fuller calendars, fewer no-shows

Field Service
Higher first-time fix, billed on site

- **Prospecting**
  Business prospects researched and engaged for RMs.
- **Sales Execution**
  Product offers and RM referrals tracked to opened.

Online & In-Store Sales
More sales recovered, promises kept

PEOPLE & CONTROL

Recruitment
Faster hiring with explained shortlists

- **KYC & Onboarding**
  Identity checks and periodic KYC refresh.
- **Legal Operations**
  Regulatory obligations, policies and deadlines.

PLATFORM

Build Your Own
From idea to live operation, fast

START WHERE IT HURTS

Pick the operation with the most delay, manual effort, customer friction, control risk or cash impact. Finish it end to end, then add the next.

Tracked from request to done.

WORKFLOWS

Account opening and maintenance	Accounts, mandates and signatories
Periodic KYC refresh	Risk-based reviews with document requests
Payment investigation and recall	Trace, counterparty message, return
Dispute and chargeback lifecycle	Provisional credit to closure
Complaint handling with SLAs	Regulatory clocks, final responses
Bereavement and account closure	Sensitive cases, end to end

DASHBOARDS



Service SLA and FCR

By channel, product and team



Dispute ageing and losses

Open disputes, write-offs, win rate



Complaint TAT and returns

Regulator-ready reporting



Onboarding drop-off

Where applicants stall and why

Works alongside your core.

Ledgers and products stay in your core. Round Infinity runs servicing, investigations, disputes and complaints around them.

Customers | **Branches** | **Operations** | **Risk**

ROUND INFINITY — BANKING PACK

Agents · workflows · apps · one audit trail

Core banking | **Card processors** | **Payment rails** | **AML & fraud engines** | **Loan origination**

Your systems of record stay where they are

INCLUDED WITH EVERY SUBSCRIPTION

- AI Execution Engine
- AI Agent Builder
- Workflow Automation
- Customer 360
- Apps & Portals
- Integrations & APIs

Price the full journey, not just the pack.

Platform

Named users and the core platform

+

Banking pack

Apps, agents, workflows and dashboards above

+

Use cases

Service · KYC & Onboarding · Sales Execution · Accounts Receivable

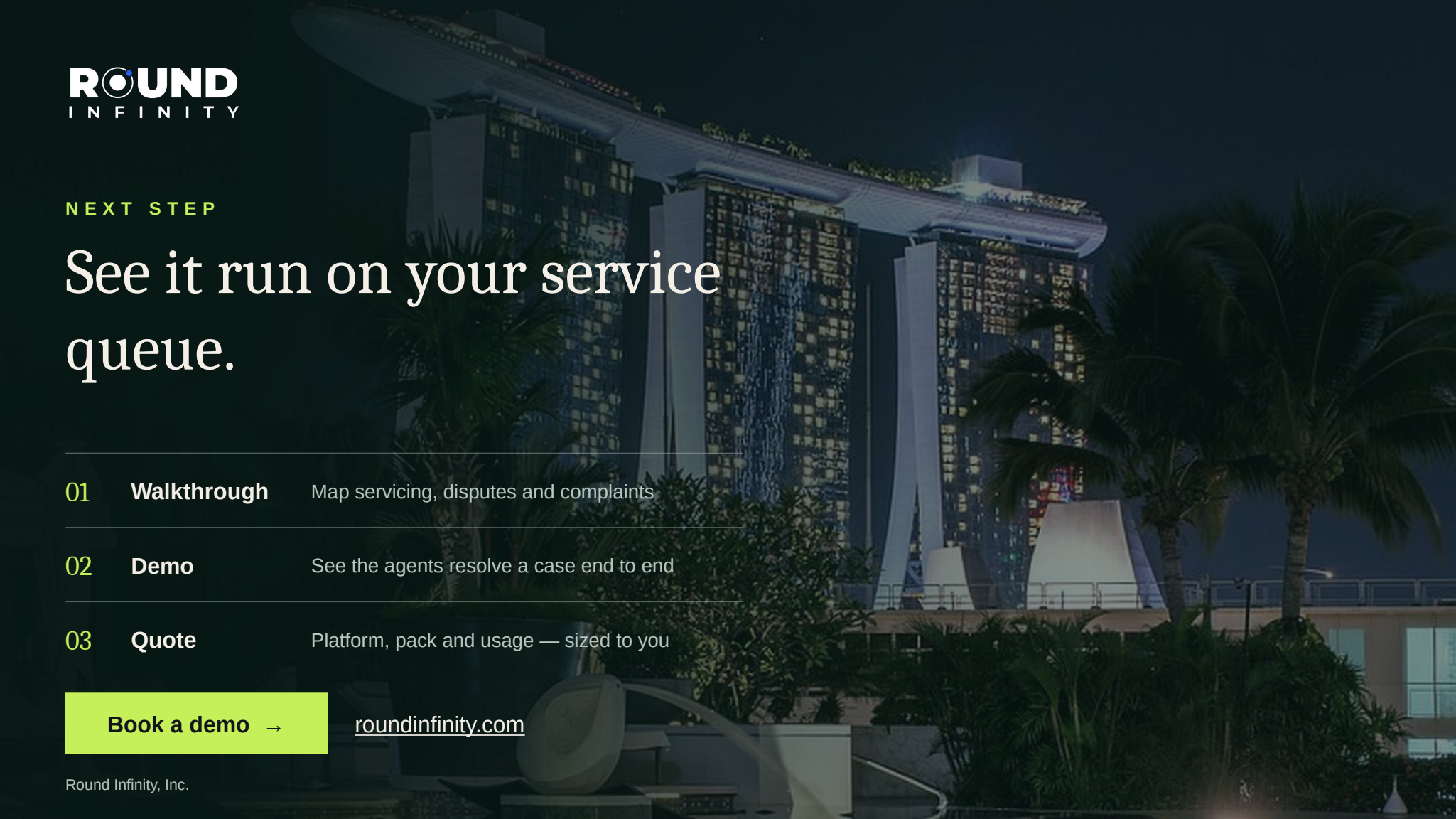
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Usage

AI, voice and messaging — pay as you use

One platform, one data model, one user set, one audit trail. The pack and your use cases share all of it.

Price your operation → roundinfinity.com/pricing



ROUND INFINITY

NEXT STEP

See it run on your service queue.

01	**Walkthrough**	Map servicing, disputes and complaints
02	**Demo**	See the agents resolve a case end to end
03	**Quote**	Platform, pack and usage — sized to you

Book a demo →

roundinfinity.com

Round Infinity, Inc.