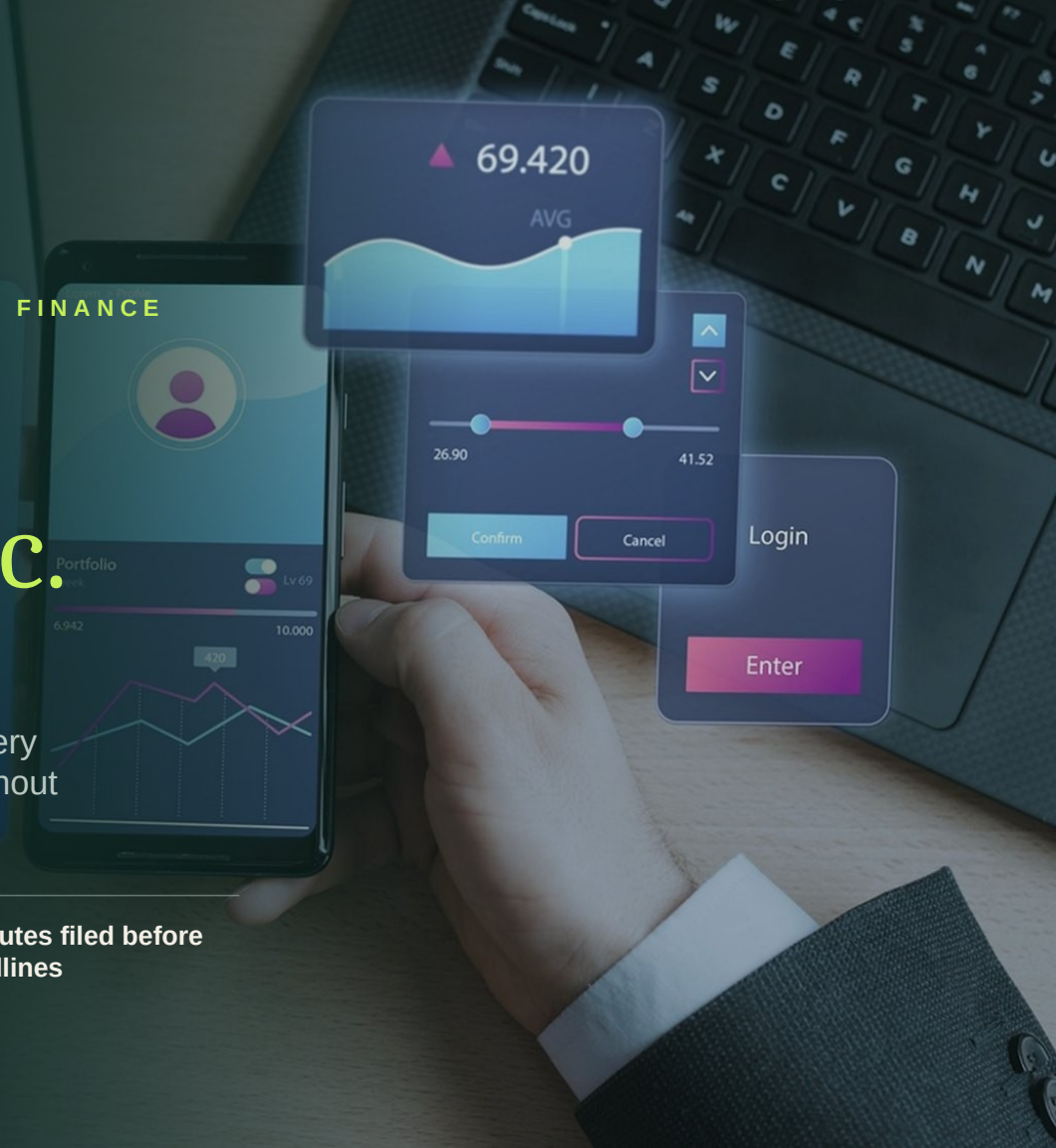
ROUND INFINITY

FOR PAYMENTS, WALLETS, LENDING AND EMBEDDED FINANCE

Move your fintech operations to agentic.



AI agents onboard users, trace every payment and draft every dispute. Your ops and risk teams approve what matters, without growing headcount.

01 **Onboarding fixed in the session**

02 **Transaction issues resolved in chat**

03 **Disputes filed before deadlines**

Round Infinity, Inc.

From manual to agentic.

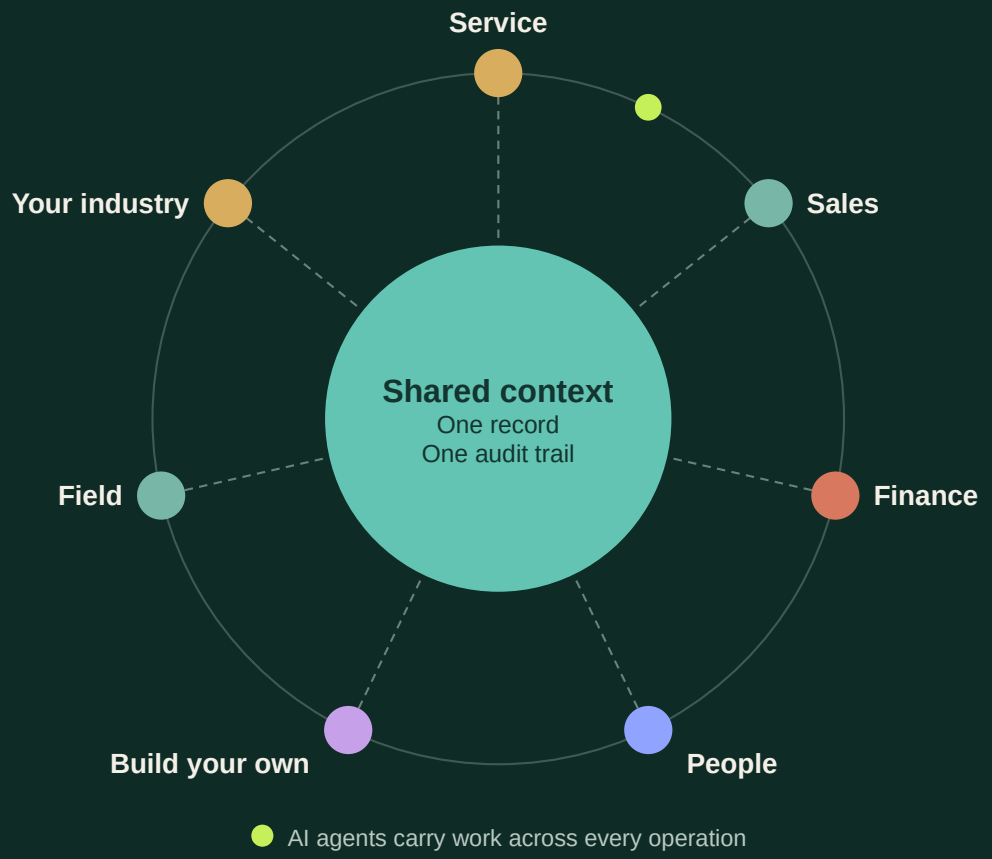
TODAY		WITH ROUND INFINITY
Failed KYC explained by email days later	→	Failures explained in the session so users fix them
Every 'where is my money?' becomes a ticket	→	Payments traced and explained in the chat
Evidence packs assembled at the deadline	→	Evidence drafted early from logs and communications
Drifting users noticed after they leave	→	At-risk users spotted and given a reason to return



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 user 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

Onboard users with fraud checks built in

AI AGENT

User Onboarding · Identity & Fraud Screening

Verifies identity and screens fraud signals in the flow.

APP User Operations Console

PEOPLE Risk analysts review flagged users.

USE CASE **KYC & Onboarding**

→

02 TRANSACT

Answer every payment and transfer question

AI AGENT

Transaction Service

Traces payments and answers users with live status.

APP Transaction Investigation

PEOPLE Ops handles stuck payments.

USE CASE **Service**

→

03 DISPUTE

Win disputes and chargebacks on time

AI AGENT

Dispute & Chargeback

Gathers evidence and drafts representments before deadlines.

APP Dispute & Chargeback Manager

PEOPLE Analysts approve each submission.

USE CASE **Financial Close**

→

04 COLLECT

Collect repayments with plans in policy

AI AGENT

Repayment & Collections

Reminds, offers plans within policy and records promises.

APP Repayments Workspace

PEOPLE Collectors handle hardship cases.

USE CASE **Accounts Receivable**

→

05 GROW

Win back lapsed users and grow partners

AI AGENT

Customer Recovery

Spots churn and offers the right recovery action.

APP Merchant & Partner Operations

PEOPLE Growth teams set the offers.

USE CASE **Sales Execution**

04 VERIFY

Every review, with the reasons.

Clear sign-ups go straight through. For the rest, the Screening agent lays out the risk factors and your analysts decide.

- Identity checks
- Device signals
- Behaviour pattern
- Main risk factors
- Suggested decision

POWERED BY

FINTECH PACK — Risk Review · Screening agent

+ USE CASE — KYC & Onboarding

PREPARED BY AI AGENT *Illustrative*

Sign-up review · user U-88412

Today 16:05 · wallet tier 2 upgrade

IDENTITY	ID matched · selfie liveness passed
DEVICE	Device linked to 3 other new accounts
BEHAVIOUR	Rapid top-up attempt right after sign-up
PROFILE	New user · no transaction history

SUGGESTED DECISION

Hold the tier upgrade · ask for proof of address

Analyst decides · user message drafted

Six fintech agents. Each with a partner.

AGENT 01

User Onboarding

Guides tiered KYC, reads IDs and selfies, explains failures in session.

+ KYC & Onboarding

AGENT 02

Identity & Fraud Screening

Scores sign-ups and transactions and routes high risk to analysts.

+ KYC & Onboarding

AGENT 03

Transaction Service

Traces payments across processor and ledger; triggers eligible refunds.

+ Service

AGENT 04

Dispute & Chargeback

Classifies by reason code and drafts representments before deadlines.

+ Financial Close

AGENT 05

Repayment & Collections

Contacts missed payers, offers plans in policy, records promises.

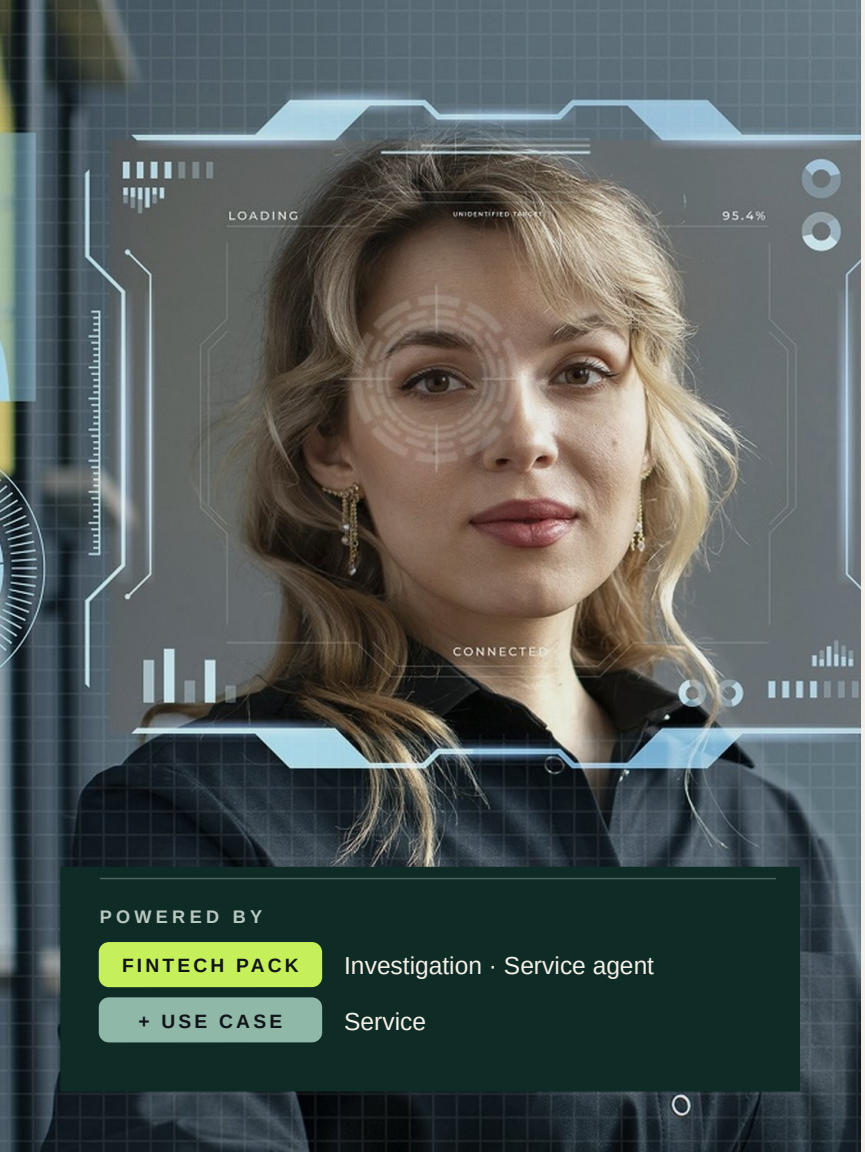
+ Accounts Receivable

AGENT 06

Customer Recovery

Spots users at risk of churn and sends personal win-back offers.

+ Prospecting



06 TRANSACT

Payment questions, answered in chat.

The agent finds the payment across your processor and ledger, explains it, and fixes what policy allows.

ACTIVITY · TRANSACTION CASE T-70215 *Illustrative*

18:02	USER	Asked where a 120.00 transfer went
18:02	AGENT	Found it in the processor · failed at bank
18:02	AGENT	Explained status · reversal eligible
18:03	AGENT	Triggered reversal within approved limits
18:03	USER	Confirmed · asked to retry the transfer
18:04	AGENT	Retry succeeded · receipt sent in app
18:04	AGENT	Case closed · no ticket needed

Disputes filed before the deadline.



Resolve

Failed payments, refunds and disputes run as cases with deadlines. The Dispute & Chargeback agent assembles evidence from logs and communications and drafts the representment for approval.

POWERED BY

FINTECH PACK — Dispute Manager · Dispute agent

+ USE CASE — Financial Close

Collect

Customers who miss a payment are contacted by app, WhatsApp or voice and offered a plan within policy. Promises to pay are recorded and tracked to cure.

POWERED BY

FINTECH PACK — Repayments · Collections agent

+ USE CASE — Accounts Receivable

08 THE PACK

Six applications, built for fintech ops.

User Operations Console
Users, accounts, devices, limits, transactions

Transaction Investigation
Trace, reverse and refund across systems

Dispute & Chargeback Manager
Reason codes, evidence, network deadlines

Risk Review Queue
Holds, freezes, reviews, decision trail

Repayments Workspace
Schedules, failed debits, plans, hardship

Merchant & Partner Operations
Onboarding, settlements, partner cases



Use cases that complete the picture.

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

● In the Fintech pack

FINANCE

- **Accounts Payable**
  Vendor and partner invoices matched and paid.

Procurement
Spend controlled before it is committed

- **Accounts Receivable**
  Repayments, plans and promises to pay tracked.
- **Financial Close**
  Ledger reconciliations, losses and audit evidence.

PO to Cash
Clean orders, fewer delays

Travel & Expense
Policy enforced before money leaves

CUSTOMERS & REVENUE

- **Service**
  User and merchant questions on every channel.

Appointment Scheduling
Fuller calendars, fewer no-shows

Field Service
Higher first-time fix, billed on site

- **Prospecting**
  Win-back and growth audiences engaged.
- **Sales Execution**
  Merchant and partner deals tracked to live.

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

PEOPLE & CONTROL

Recruitment
Faster hiring with explained shortlists

- **KYC & Onboarding**
  Identity, KYB and tiered verification.
- **Legal Operations**
  Partner agreements and regulatory obligations.

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

Tiered KYC upgrade	Limits raised as users verify more
Failed payment and reversal	Detect, retry, reverse and notify
Chargeback representment	Evidence, submission and outcome
Account freeze and release	Review, request information, decide
Hardship and repayment plans	Approve, track and cure
Merchant onboarding	KYB, settlement setup, go-live

DASHBOARDS



Onboarding conversion

By step, channel and partner



Dispute win rate and losses

By reason code and merchant



Issue resolution time

From report to fixed

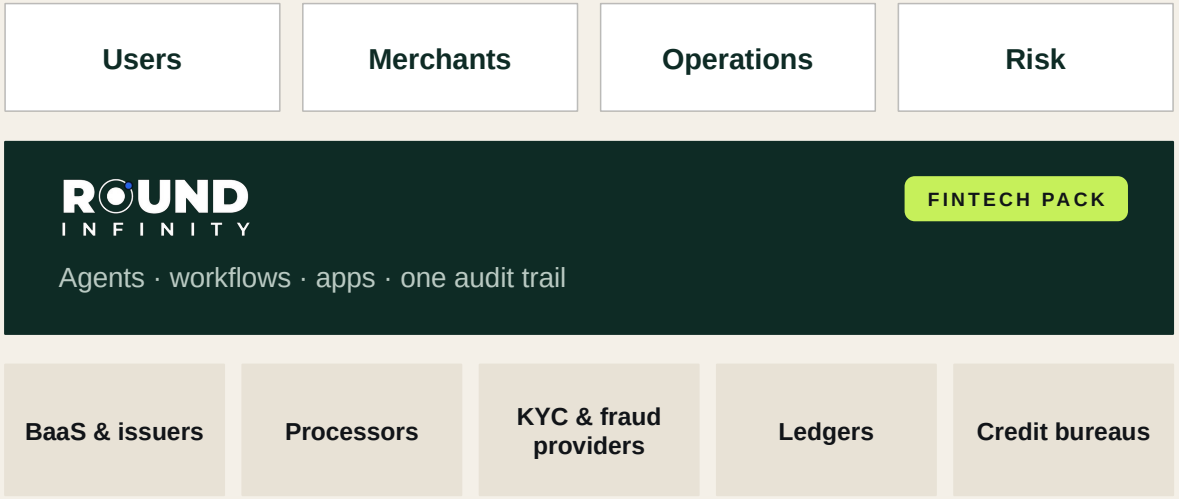


Delinquency buckets

Roll rates and cure rates

Money stays on your rails.

Money movement stays on your ledger, issuer and processor. Round Infinity runs onboarding, investigations, disputes, risk and repayments around them.



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

+

Fintech pack

Apps, agents, workflows and dashboards above

+

Use cases

KYC & Onboarding · Service · Accounts Receivable · Sales Execution

+

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 ops queue.

01	**Walkthrough**	Map onboarding, transactions and disputes
02	**Demo**	See the agents resolve a payment issue
03	**Quote**	Platform, pack and usage — sized to you

Book a demo →

roundinfinity.com