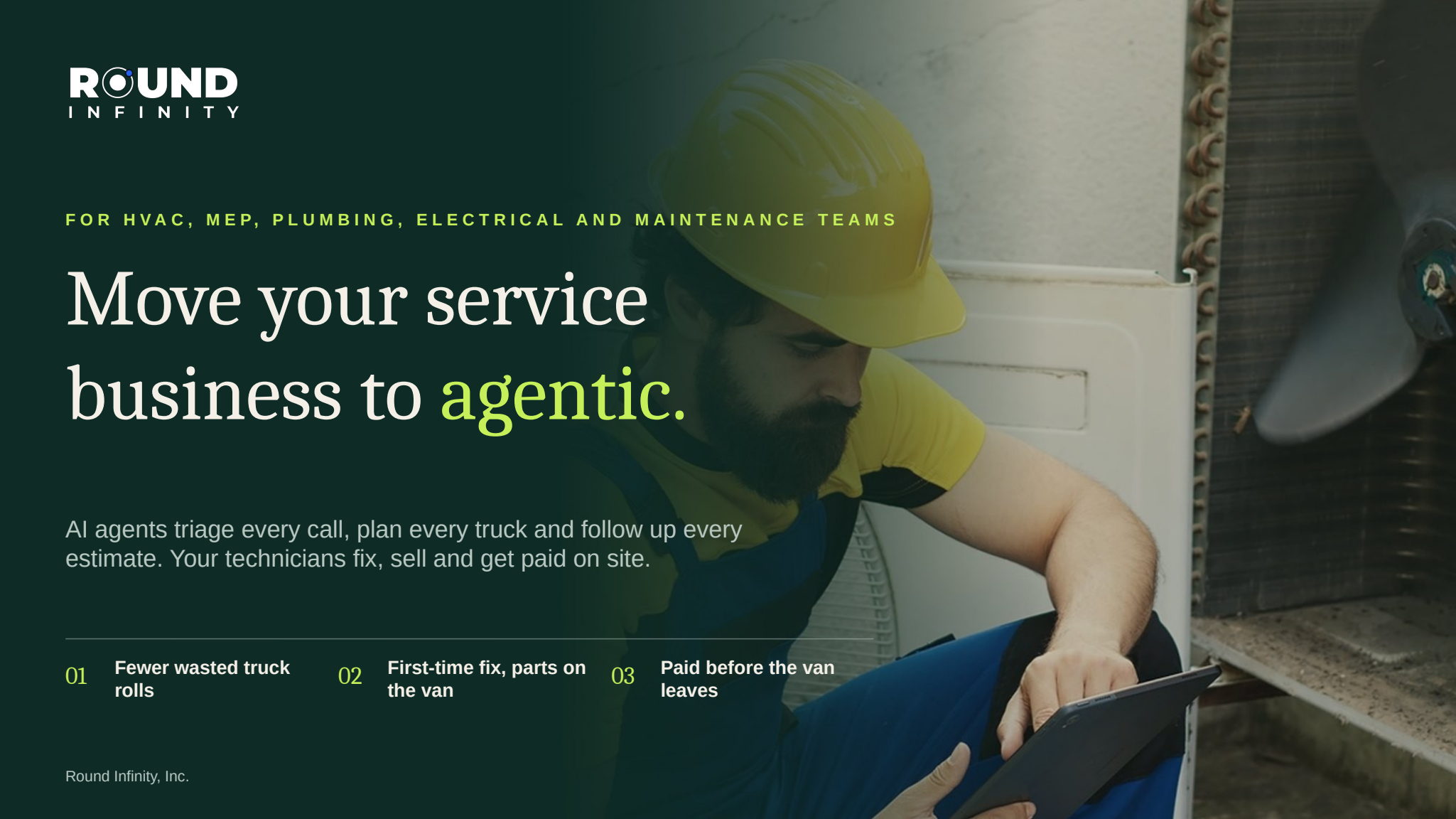
ROUND INFINITY

FOR HVAC, MEP, PLUMBING, ELECTRICAL AND MAINTENANCE TEAMS

Move your service business to agentic.

AI agents triage every call, plan every truck and follow up every estimate. Your technicians fix, sell and get paid on site.

01	**Fewer wasted truck rolls**	02	**First-time fix, parts on the van**	03	**Paid before the van leaves**



Round Infinity, Inc.

From manual to agentic.

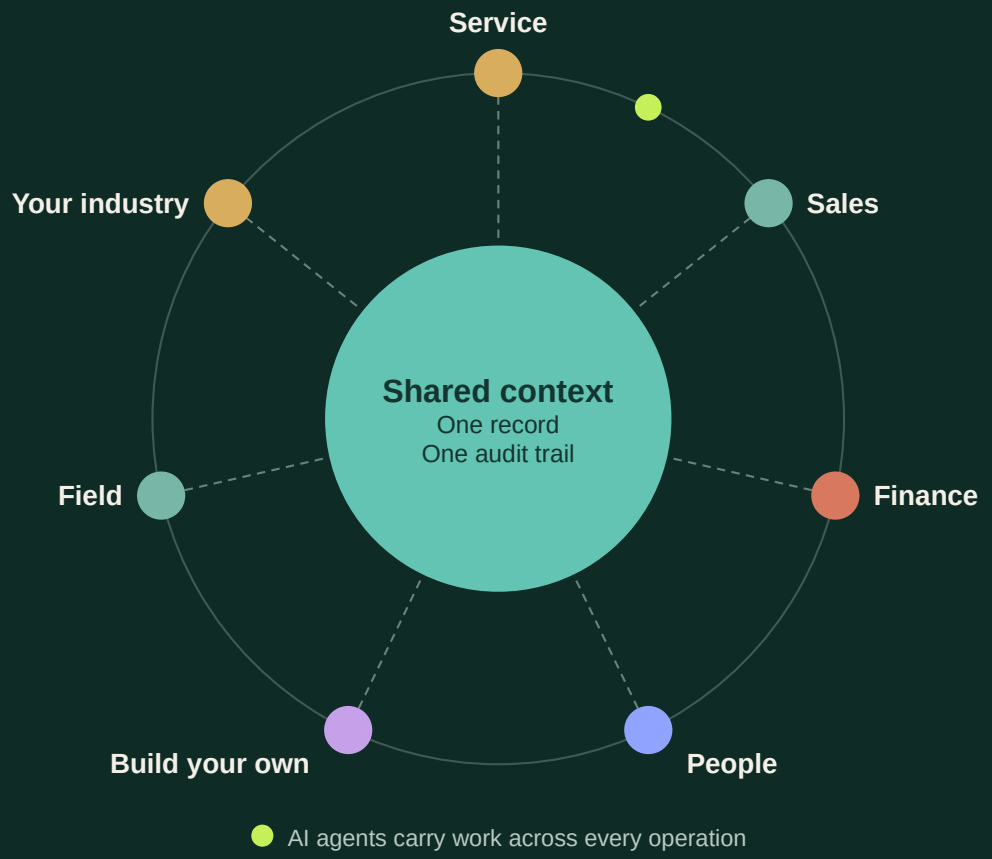
TODAY		WITH ROUND INFINITY
Trucks sent for problems a reset would fix	→	Simple fixes guided remotely; visits booked only when needed
Technicians arrive blind to the unit	→	History, manuals and likely cause on their phone
Second trips for missing parts	→	Parts predicted and checked against van stock
Invoices chased days after the job	→	Proof, certificate, invoice and payment before leaving



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 DIAGNOSE

Triage every call and fix remotely when you can

AI AGENT

Service Triage · Remote Resolution

Identifies equipment and fault; resolves simple issues remotely.

APP Call Booking & Tracking

PEOPLE Dispatch confirms truck rolls.

USE CASE **Service**

02 PLAN

Plan the job with history and parts

AI AGENT

Parts Readiness

Predicts the parts the job needs and checks stock.

APP Equipment & Site History

PEOPLE Service managers approve special orders.

USE CASE **Appointment Scheduling**

03 DISPATCH

Send the right technician and re-plan the day

AI AGENT

Dispatch Optimization

Assigns by skill, location and SLA; re-plans on overruns.

APP Van Stock & Parts

PEOPLE Dispatchers manage exceptions.

USE CASE **Field Service**

04 FIX & SELL

Fix it first time and quote on site

AI AGENT

Field Technician Copilot · Estimate Follow-up

Guides the fix and follows up open estimates.

APP On-site Estimates · Pricebook

PEOPLE Technicians fix; customers approve quotes.

USE CASE **Sales Execution**

05 RENEW

Renew agreements before they expire

AI AGENT

Estimate Follow-up

Reminds customers and books maintenance visits.

APP Agreements · Certificates

PEOPLE Account owners renew key contracts.

USE CASE **Accounts Receivable**

04 FIX

Every visit starts informed.

The Field Technician Copilot gives the technician the unit's story, the likely cause and the options to present.

- Unit model and history
- Reported symptoms
- Likely cause
- Parts on the van
- Options to present

POWERED BY

TRADES PACK — Equipment History · Copilot

+ USE CASE — Field Service

PREPARED BY AI AGENT

Illustrative

Job J-20417 · no cooling

Today 14:00 · two-storey home · plan customer

UNIT	Split AC · installed 2017 · serviced last year
SYMPTOM	Outdoor fan runs, no cold air since morning
LIKELY	Failed capacitor, common on this model
VAN STOCK	Capacitor in stock · refrigerant running low

OPTIONS TO PRESENT

Good: capacitor replacement at flat rate

Better: add coil clean · Best: high-efficiency unit

Six trades agents. Each with a partner.

AGENT 01

Service Triage

Asks diagnostic questions and books the right job type and priority.

+ Service

AGENT 02

Dispatch Optimization

Assigns by skill, location and priority; re-plans when jobs overrun.

+ Field Service

AGENT 03

Field Technician Copilot

Gives history, manuals and steps by voice or chat; drafts job notes.

+ Field Service

AGENT 04

Parts Readiness

Predicts parts from the symptom, checks van stock, orders the rest.

+ Procurement

AGENT 05

Estimate Follow-up

Chases unsold options, answers financing questions, books work.

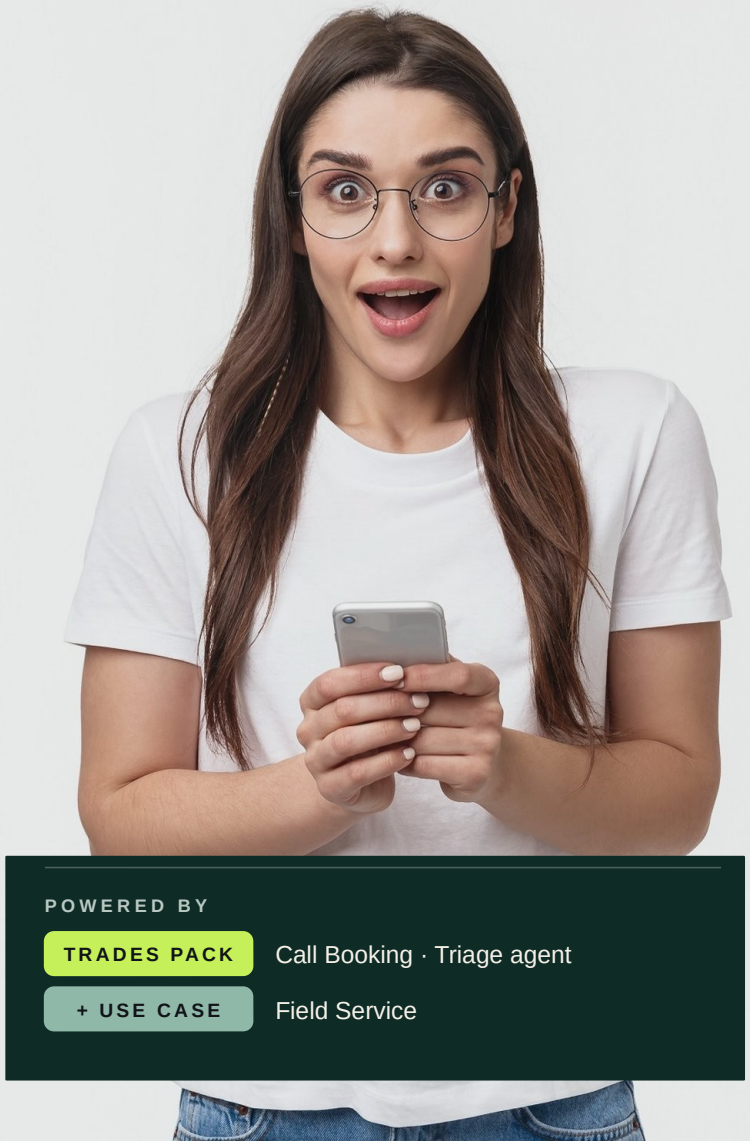
+ Sales Execution

AGENT 06

Remote Resolution

Guides simple fixes like resets and filters before a truck rolls.

+ Service



POWERED BY

TRADES PACK — Call Booking · Triage agent

+ USE CASE — Field Service

06 DIAGNOSE & DISPATCH

First call to paid, same day.

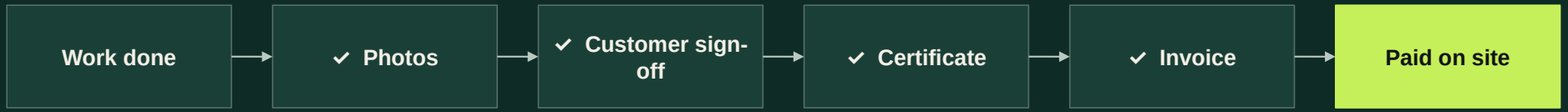
Triage, dispatch, the visit and payment run as one job, with the customer kept informed throughout.

ACTIVITY · JOB J-20417 *Illustrative*

07:42	CUSTOMER	Called: AC running but not cooling
07:43	AGENT	Asked diagnostic questions · reset didn't help
07:44	AGENT	Booked priority visit · plan customer
11:30	AGENT	Re-planned after an overrun · ETA 14:00 sent
14:05	TECH	Found failed capacitor · options presented
14:12	CUSTOMER	Approved the 'better' option on the tablet
15:20	AGENT	Paid on site · certificate issued

07 SELL & KEEP

Nobody leaves without proof and payment.



Sell on site

Technicians present good, better and best options with photos and financing from the flat-rate pricebook. The Estimate Follow-up agent chases unsold options and books approved work.

POWERED BY

TRADES PACK — On-site Estimates · Follow-up agent

+ USE CASE — Sales Execution

Keep the customer

Maintenance plan visits are generated and booked each season, agreements renew before expiry, and review requests go out after every job.

POWERED BY

TRADES PACK — Service Agreements · Reviews

+ USE CASE — Appointment Scheduling

08 THE PACK

Eight applications, built for the trades.

Service Agreements & Plans
Entitlements, visits due and renewals

Flat-rate Pricebook
Tasks, parts, labour and price tiers

Equipment & Site History
Every unit, serial, warranty and visit

On-site Estimates
Good, better, best with photos, financing

Van Stock & Parts
Truck inventory, replenishment, on order

Compliance Certificates
Gas, electrical, safety certificates on site

Call Booking & Tracking
Inbound calls, sources, booked jobs

Reviews & Reputation
Review requests and response tracking



Use cases that complete the picture.

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

● In the Trades pack

FINANCE

Accounts Payable
80% faster invoice processing

● Procurement
Parts and equipment bought to need.

● Accounts Receivable
Paid on site; open balances collected.

Financial Close
Slips seen before reporting is at risk

PO to Cash
Clean orders, fewer delays

Travel & Expense
Policy enforced before money leaves

CUSTOMERS & REVENUE

● Service
Customer calls and messages on every channel.

● Appointment Scheduling
Visits and maintenance slots booked and reminded.

● Field Service
Dispatch, routes, arrival times and proof of work.

● Prospecting
Lapsed and seasonal customers re-engaged.

● Sales Execution
Options and financing tracked to sold.

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

PEOPLE & CONTROL

● Recruitment
Technicians hired and onboarded.

KYC & Onboarding
Faster onboarding, the right controls

Legal Operations
Faster answers, no missed 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

Maintenance plan visits	Generated, booked, completed each season
Estimate follow-up	Unsold options chased and converted
Warranty and manufacturer claims	Parts and labour recovered
Callback and recall jobs	Repeat visits tracked to root cause
Agreement renewal	Renewed before expiry
Consumer financing	Applied, approved, attached to estimate

DASHBOARDS



Revenue per technician

Sold, completed, average ticket



Estimate conversion

Options presented versus sold



Agreement coverage

Active, due and lapsed

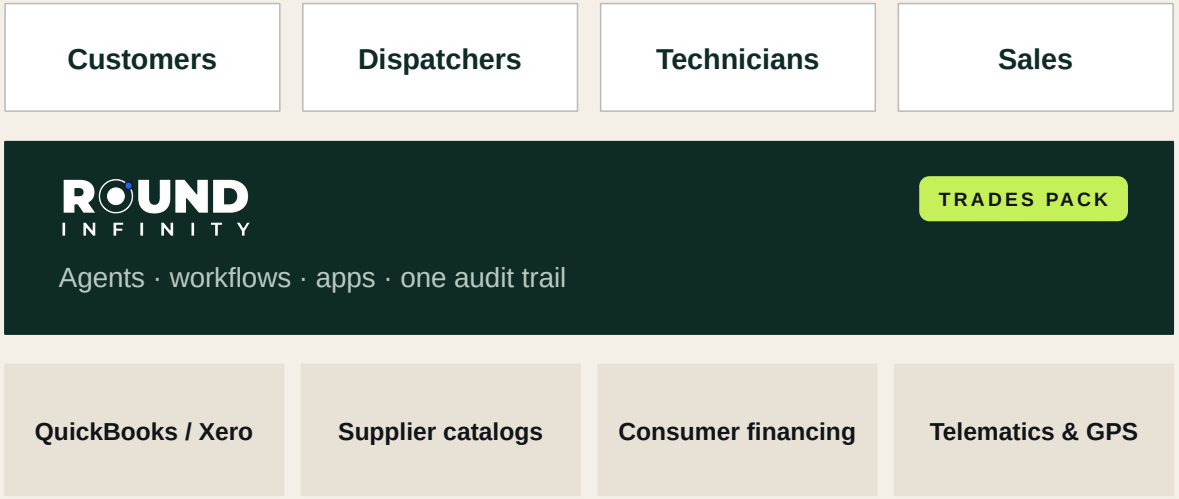


Callbacks and first-time fix

By technician and equipment

All-in-one for the trades.

No separate field-service software needed. Calls, jobs, pricebook, agreements, estimates, van stock and certificates run on one platform.



Accounting, suppliers and fleet systems connect in.

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

+

Technical Services pack

Apps, agents, workflows and dashboards above

+

Use cases

Field Service · Appointment Scheduling · Accounts Receivable · Service

+

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 tomorrow's schedule.

01	**Walkthrough**	Map calls, dispatch, estimates and plans
02	**Demo**	See the agents run a job from call to paid
03	**Quote**	Platform, pack and usage — sized to you

Book a demo →

roundinfinity.com