

THE AI-NATIVE COMMAND CENTRE FOR FACILITIES TEAMS

Stop chasing the operation. Start running it.

Jobs, planned maintenance, compliance, assets, suppliers, money and ESG on one live record, with a governed AI team that drafts, chases and checks while your people decide.

Wallboard shown as a preview feature



Phone layout is illustrative

Estates are run from five systems and a lot of chasing.



Five places for one answer

Jobs in one system, PPM in a spreadsheet, certificates in inboxes, supplier paperwork somewhere else. "Are we compliant at this site?" takes an afternoon.



Time lost to chasing

Engineers for notes, suppliers for prices and certificates, clients for approvals. None of the chasing shows up in a report.



Risk hides in the gaps

An expired certificate, a quietly breached SLA, an invoice with no PO. The expensive problems are the ones nobody could see.



Month-end eats the week

KPIs, client packs, carbon figures and spend reviews are re-keyed by hand from systems that do not talk to each other.



Trade Counter puts the whole operation on one live record, keeps it current, and gives you a governed AI team that drafts, chases and checks. Your people review and decide.

The system chases. You decide.

An illustrative day on recreated screens with fictional data.

07:30

The day is briefed

An AI-prioritised briefing from live operations is waiting for you.

08:15

The inbox is cleared

Everything that needs a human, ranked. Statutory deadlines and breached SLAs first.

10:00

Unbilled work is caught

The AI Credit Controller proposes an invoice for a completed, unbilled job; a person accepts or dismisses it.

11:30

A gap is closed

AI ranks the assets most at risk and recommends a PPM where none is booked. A person schedules it.

14:00

Bids are compared

Priced returns side by side. The AI advises; a person appoints.

17:00

The report runs itself

The exec monthly is built, previewed and scheduled, ready for the client.

● OPS HEALTH

86

Good · Signals are steady. Two sites worth a look.

● OPEN JOBS

64

↓ 9 vs last 7d · 3 past SLA

Expired

Emergency lighting annual test certificate

Certificate · Riverside House, Leeds

SLA breached

Chiller low-refrigerant alarm

P2 · Quayside Offices, Bristol

SLA breached

Water ingress above comms room ceiling

P3 · Carlton Exchange, Manchester

SLA breached

Boiler lockout, plant room B

P3 · Elmfield Campus, Nottingham

AI Credit Controller suggests: invoice completed job JOB-2471

EVIDENCE			
Confidence	high	Source	Unbilled jobs
Job	JOB-2471	Days unbilled	12
Site	Abbey Wharf	Value	£1,860.00

At-risk assets

Predicted · 5 of 1,412 flagged

1

Emergency lighting EL-12

Critical

142

→

emergency-lighting · RIVERSIDE HOUSE ·

PPM overdue · 28 Sep 2026

2

Chiller CH-01

Critical

128

→

chiller · QUAYSIDE OFFICES ·

PPM overdue · 24 Sep 2026

AI bid review · Draft

4 priced returns, 1 outstanding

Budget estimate £22,500 · return by 2 Oct 2026

SUPPLIER	LEAD	PRICE
Quillmere Mechanical	1 week	£21,640
Dunmarrow Air Systems	3 weeks	£19,850
Talveth HVAC Services	2 weeks	£23,480

Schedule Exec monthly

CADENCE

Monthly

FIRST RUN

02/11/2026

RECIPIENTS

Hannah P. × Marcus D. × +2

Cancel

Save schedule

One live record. Every role sees the work that is theirs.



Workspace Admin

The whole estate, settings, approval thresholds, branding and the AI team.



FM Manager

Dashboard, approvals, compliance, quotations and invoices.



Engineer

Jobs, upcoming visits, eLogbook and incidents. Start work, log labour, close out.



One live record

jobs · PPM · compliance
assets · suppliers
money · carbon

5 roles × 29 permissions, with tenant overrides and a “View as role” preview.



Customer

A client portal: requests, approvals, quotations, invoices, compliance, ESG and the AI Assistant.



Supplier portal

Invite suppliers, approve or decline applications, and collect their documents and comments.

Plus public links

Track my request, review and accept a quote, invoice PDF links and an occupant QR portal. No login needed.

Everything the operation needs, in one workspace.

Six areas, one record. Turn modules on or off per workspace, and brand it as your own.

Home

Dashboard

Now

Approvals

Calendar

Timeline

Wallboard (preview)

Work

Jobs (Kanban + list)

Client Requests

Upcoming Visits

Engineer Schedules

eLogbook

Incidents (RIDDOR)

Compliance

Compliance matrix

Renewals

PPM Planner

Maintenance Plan

Documents vault

Assets and sites

Asset register

Forward Maintenance

Sites

Map

3D Walkthroughs

Commercial

Quotations

Enquiries (RFQ)

Works Orders

Quote Builder

Price Book

Contracts

Suppliers

Supplier KPIs

Financials

Intelligence

Mission Control

AI Assistant

AI Workflows (34)

Auto Reports

ESG Performance

Net Zero

34 governed AI workflows

8 AI agents

13 compliance frameworks

8 report templates

7 wallboard boards (preview)

5 roles

12 optional modules

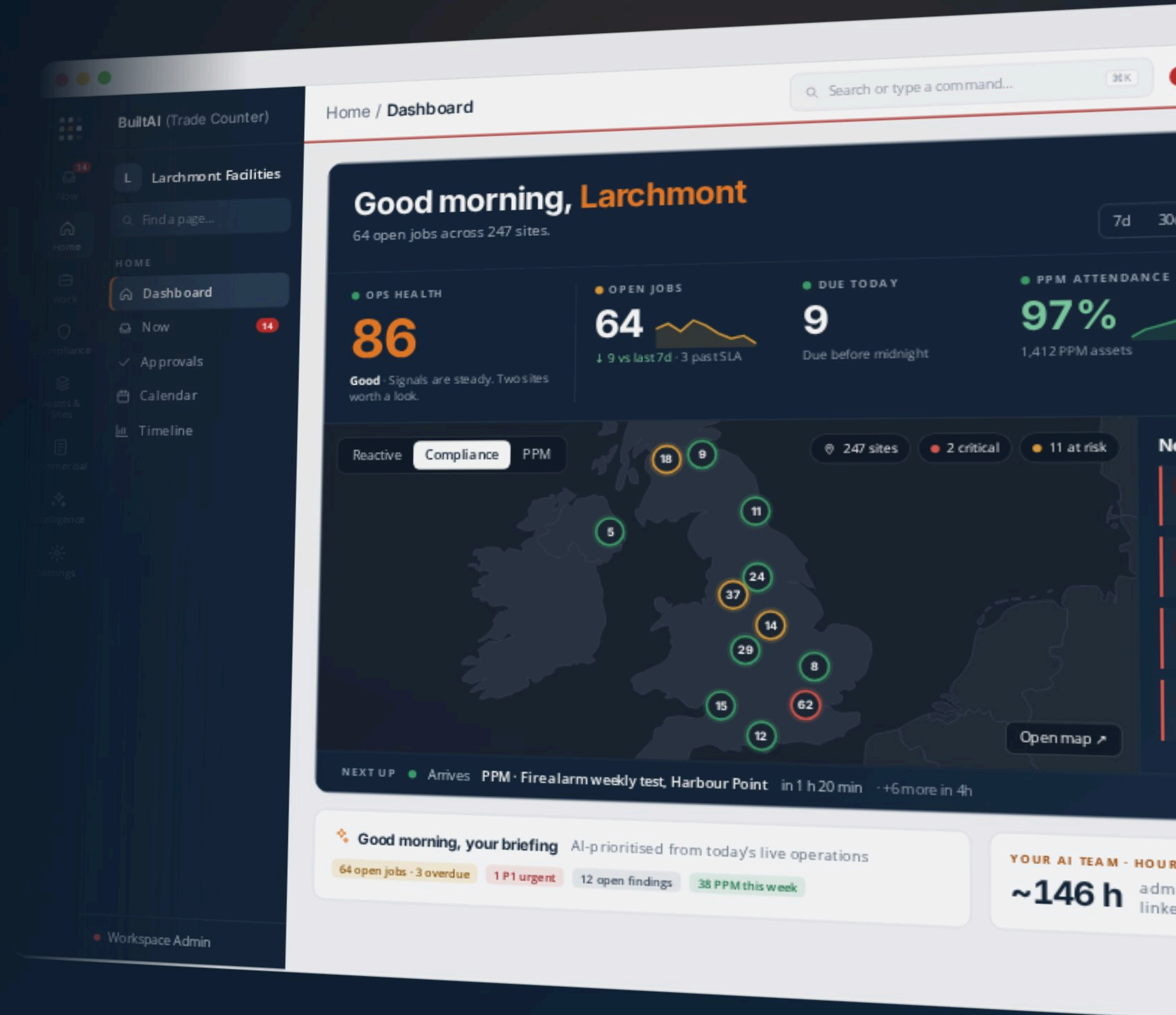
01

CHAPTER 01

Operations

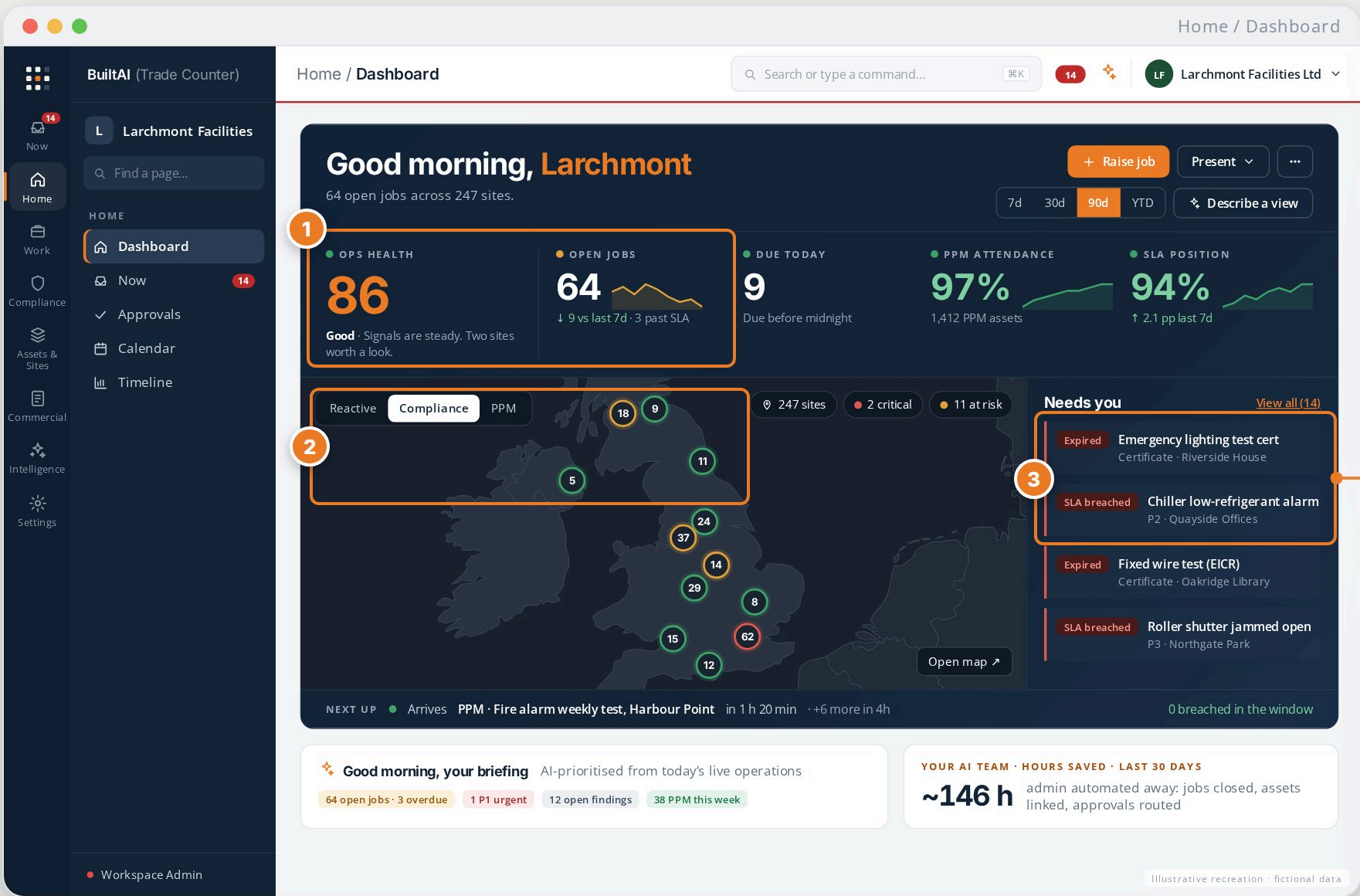
See the whole estate, know what needs you, and track every job against its SLA.

- Dashboard
- Now
- Jobs and SLAs
- Wallboard (preview)



The whole estate on one screen.

Live KPIs, a portfolio map and everything that needs you, the moment you sign in. Ask AI to compose a view, or test a What if?



1 Ops health and open jobs

A health score out of 100 in plain words, and open jobs with a 7-day trend and how many are past SLA.

OPS HEALTH

86

Good · Signals are steady. Two sites worth a look.

OPEN JOBS

64

↓ 9 vs last 7d · 3 past SLA

2 Portfolio map

Site clusters coloured by status, with Reactive, Compliance and PPM layers.

Reactive

Compliance

PPM

3 Needs you

Expired certificates and breached SLAs, each with its site.

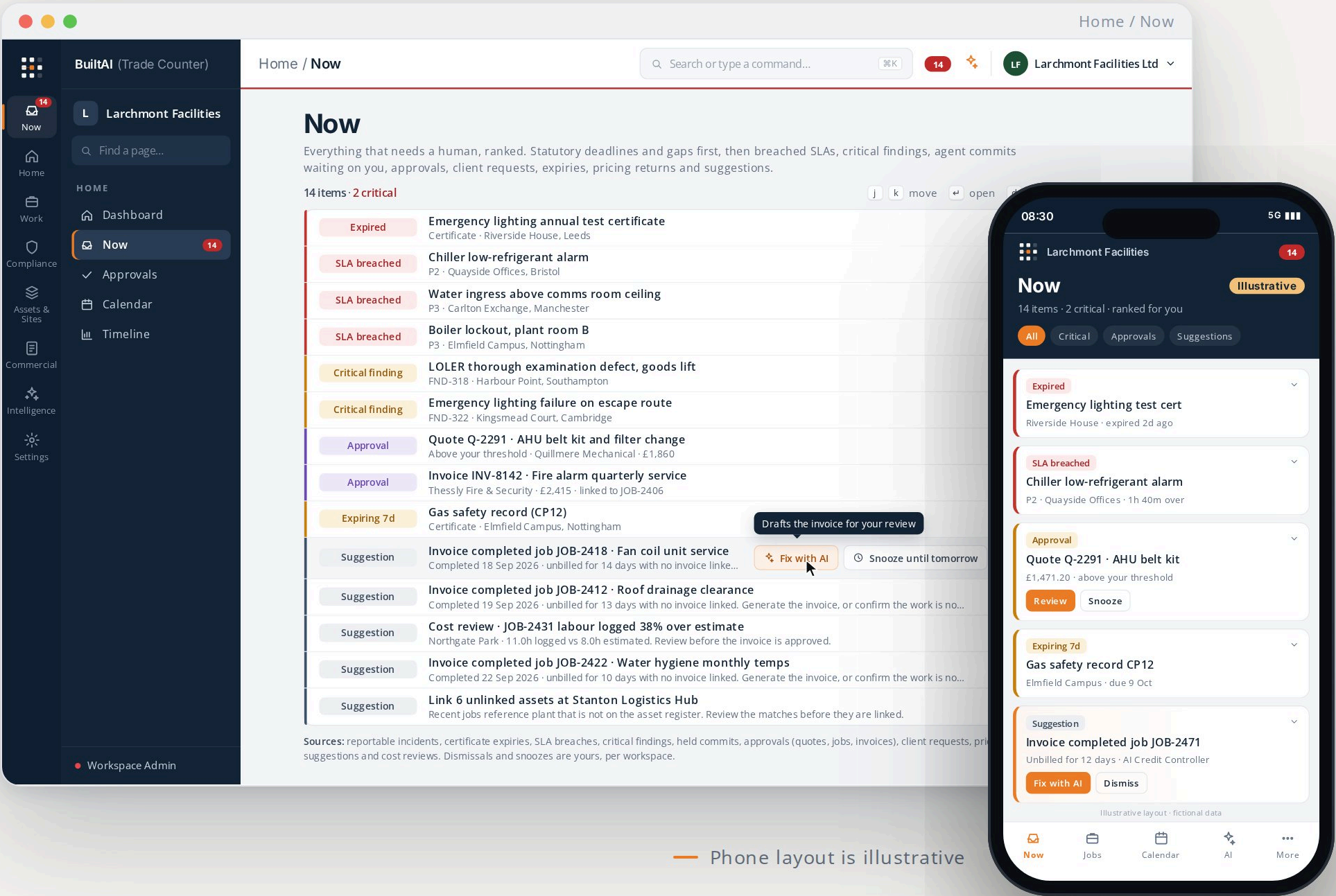
Expired Emergency lighting test cert
Certificate · Riverside House

SLA breached Chiller low-refrigerant alarm
P2 · Quayside Offices

Everything that needs a human, ranked.

Statutory deadlines first, then breached SLAs, critical findings, approvals, client requests, expiries and AI suggestions.

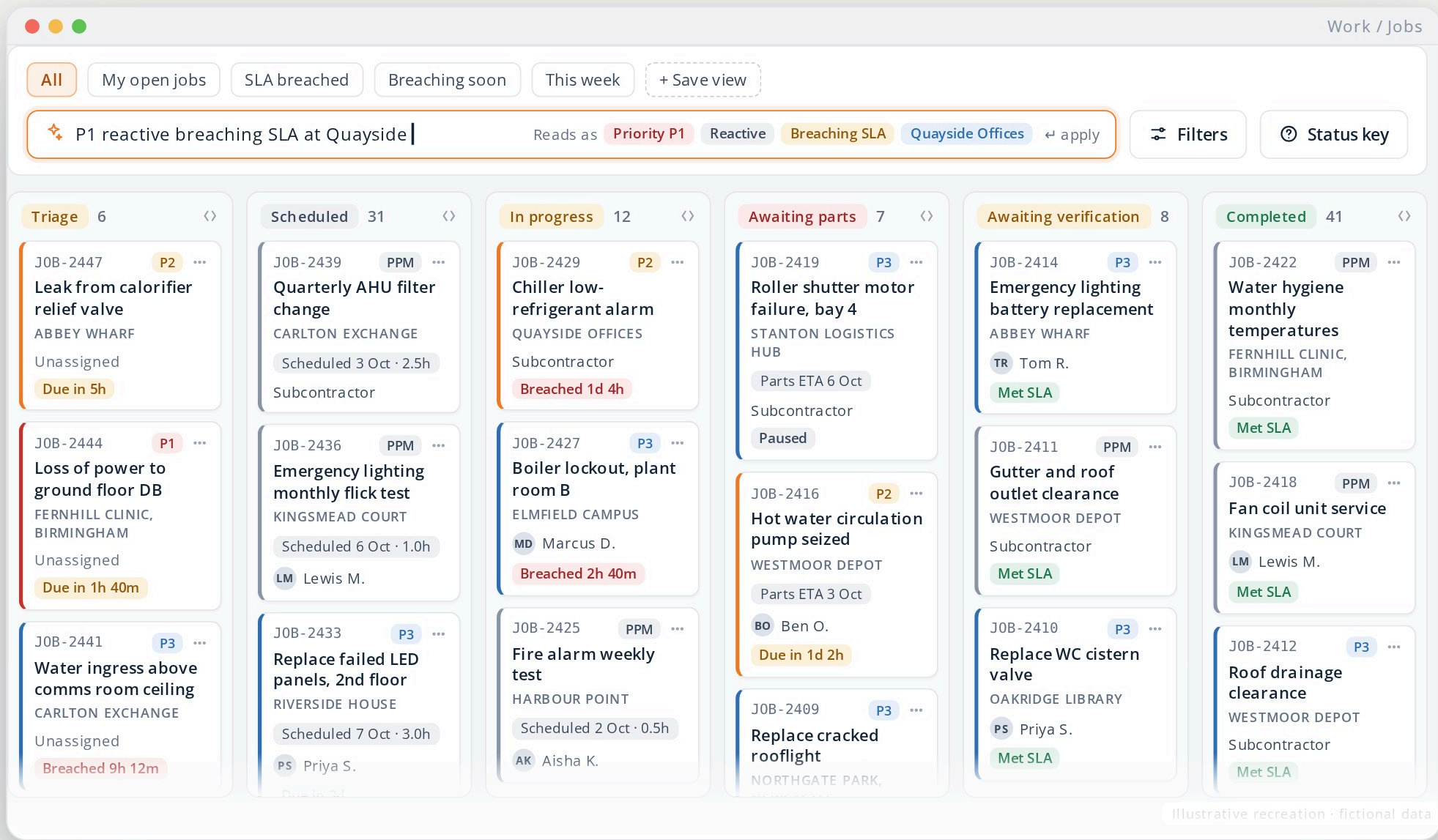
- One ranked inbox across certificates, SLAs, findings, approvals and pricing returns
- Keyboard triage: j/k to move, enter to open, d to dismiss, s to snooze
- Fix with AI on any suggestion, or snooze until tomorrow
- Approvals: quotes, jobs and invoices above your threshold land here
- Installable app for the team on the move



All jobs, one board. SLA clock built in.

Reactive and PPM jobs on one board. Drag cards across six stages, from triage to verified and signed off. Ask for what you need in plain English.

- **SLA engine:** P1 to P3 response and resolve targets, breach clock, Breaching soon view
- **AI plain-English filter:** “P1 reactive breaching SLA at Quayside”
- **One-click packs per job:** invoice, RAMS, works order, handover cert, onsite report, COSHH, closeout, cost recovery
- **Job gates:** completion notes, an attachment and a sign-off note, enforced by the database
- **Requesters** follow progress on a public Track my request link



— Illustrative recreation on fictional data

OPERATIONS · WALLBOARD (PREVIEW)

Put the operation on the wall.

A full-screen ops-room display, available as a preview feature, that rotates through seven live boards with a live event ticker. Or present the dashboard full screen, live.

- 1 Operations today
- 2 Operations health
- 3 SLA heartbeat
- 4 Next four hours
- 5 Sites by region
- 6 Week ahead: PPM
- 7 Estate at a glance



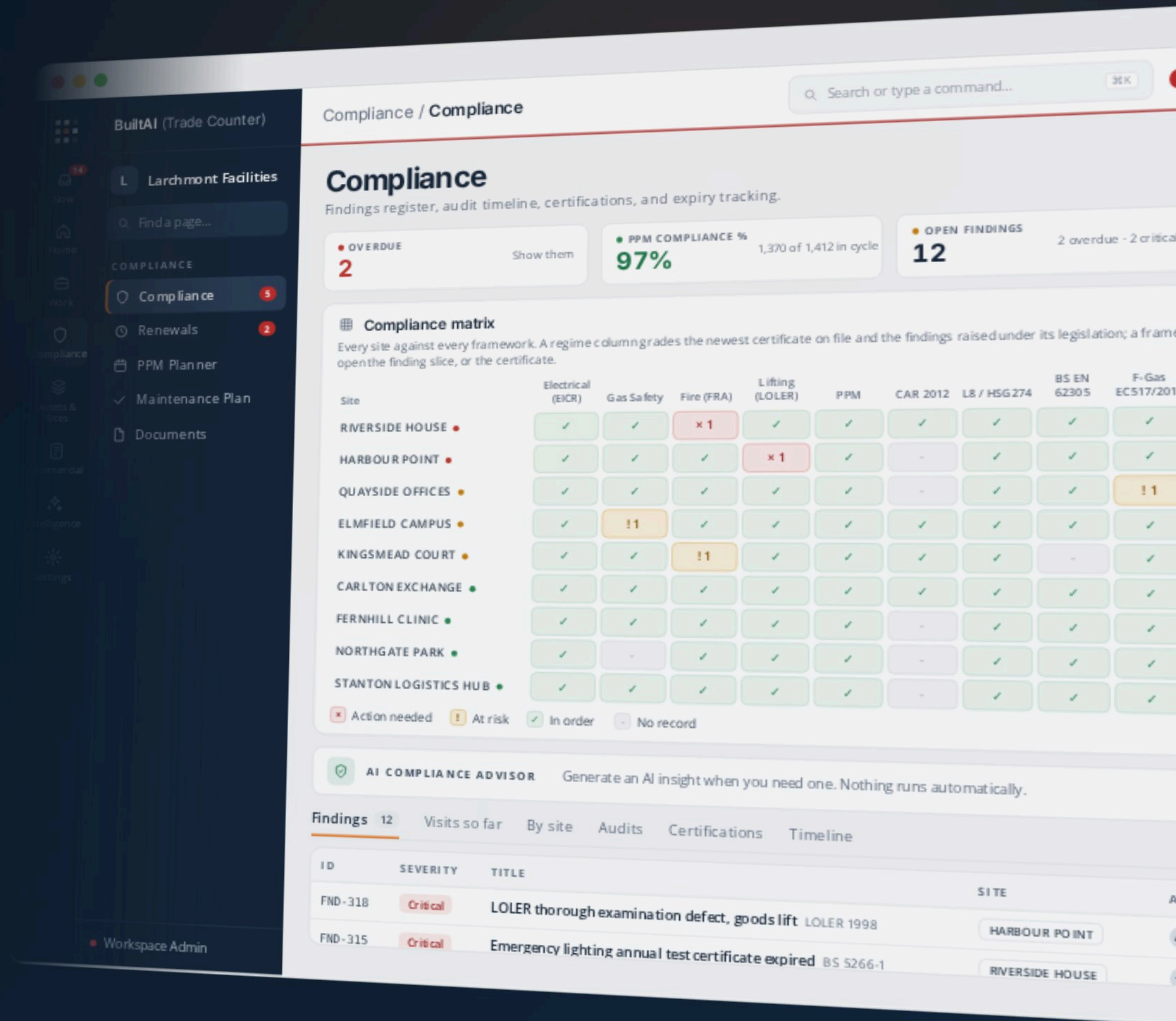
02

CHAPTER 02

Compliance

Every site against every framework, every certificate tracked, every PPM gap flagged.

- Compliance matrix
- Planned maintenance
- Renewals and documents



Every site against every framework.

One matrix across 13 UK regimes, with findings, audits, certifications and a 52-week findings heatmap behind it.

Now

14

Home

Work

Compliance

Assets & Sites

Commercial

Intelligence

Settings

BuiltAI (Trade Counter)

L Larchmont Facilities

Find a page...

COMPLIANCE

Compliance5

Renewals2

PPM Planner

Maintenance Plan

Documents

Compliance / Compliance

Search or type a command...

14

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Export

Compliance

Findings register, audit timeline, certifications, and expiry tracking.

OVERDUE2Show them

PPM COMPLIANCE %97%1,370 of 1,412 in cycle

OPEN FINDINGS122 overdue · 2 critical

EXPIRING IN 30D9Show them

Compliance matrix

Every site against every framework. A regime column grades the newest certificate on file and the findings raised under its legislation; a framework column grades findings alone. Click a cell to open the finding slice, or the certificate.

Site	Electrical (EICR)	Gas Safety	Fire (FRA)	Lifting (LOLER)	PPM	CAR 2012	L8 / HSG274	BS EN 62305	F-Gas EC517/2014	CDM 2015	BS 5499-4	BS 7346-8	BS 9251
RIVERSIDE HOUSE	✓	✓	✖ 1	✓	✓	✓	✓	✓	✓	-	✓	✓	-
HARBOUR POINT	✓	✓	✓	✖ 1	✓	-	✓	✓	✓	-	✓	✓	-
QUAYSIDE OFFICES	✓	✓	✓	✓	✓	-	✓	✓	! 1	-	✓	✓	-
ELMFIELD CAMPUS	✓	! 1	✓	✓	✓	✓	✓	✓	✓	✓	✓	-	-
KINGSMEAD COURT	✓	✓	! 1	✓	✓	✓	✓	-	✓	-	✓	✓	✓
CARLTON EXCHANGE	✓	✓	✓	✓	✓	✓	✓	✓	✓	-	✓	✓	-
FERNHILL CLINIC	✓	✓	✓	✓	✓	-	✓	✓	✓	✓	✓	-	-
NORTHGATE PARK	✓	-	✓	✓	✓	-	✓	✓	✓	-	✓	✓	-
STANTON LOGISTICS HUB	✓	✓	✓	✓	✓	-	✓	✓	✓	✓	✓	✓	-

✖ Action needed! At risk✓ In order- No record

Showing 9 of 247 sites

AI COMPLIANCE ADVISOR

Generate an AI insight when you need one. Nothing runs automatically.

Generate insight

Findings12

Visits so far

By site

Audits

Certifications

Timeline

ID	SEVERITY	TITLE	SITE	ASSIGNED	DUE
FND-318	Critical	LOLER thorough examination defect, goods lift	LOLER 1998	HARBOUR POINT	AK Aisha K.9 Oct 20267d
FND-315	Critical	Emergency lighting annual test certificate expired	BS 5266-1	RIVERSIDE HOUSE	TR Tom R.29 Sep 20263d overdue

Illustrative recreation · fictional data

1 Open and expiring

Open findings with overdue and critical counts, and what expires in 30 days.

OPEN FINDINGS
12

2 overdue · 2 critical

EXPIRING IN 30D
9

Show them

2 The compliance matrix

Sites against frameworks such as EICR, gas, FRA, LOLER and PPM, with every cell rated.

Site	Electrical (EICR)	Gas Safety	Fire (FRA)	Lifting (LOLER)	PPM
RIVERSIDE HOUSE	✓	✓	✖ 1	✓	✓
HARBOUR POINT	✓	✓	✓	✖ 1	✓
QUAYSIDE OFFICES	✓	✓	✓	✓	✓
ELMFIELD CAMPUS	✓	! 1	✓	✓	✓
KINGSMEAD COURT	✓	✓	! 1	✓	✓

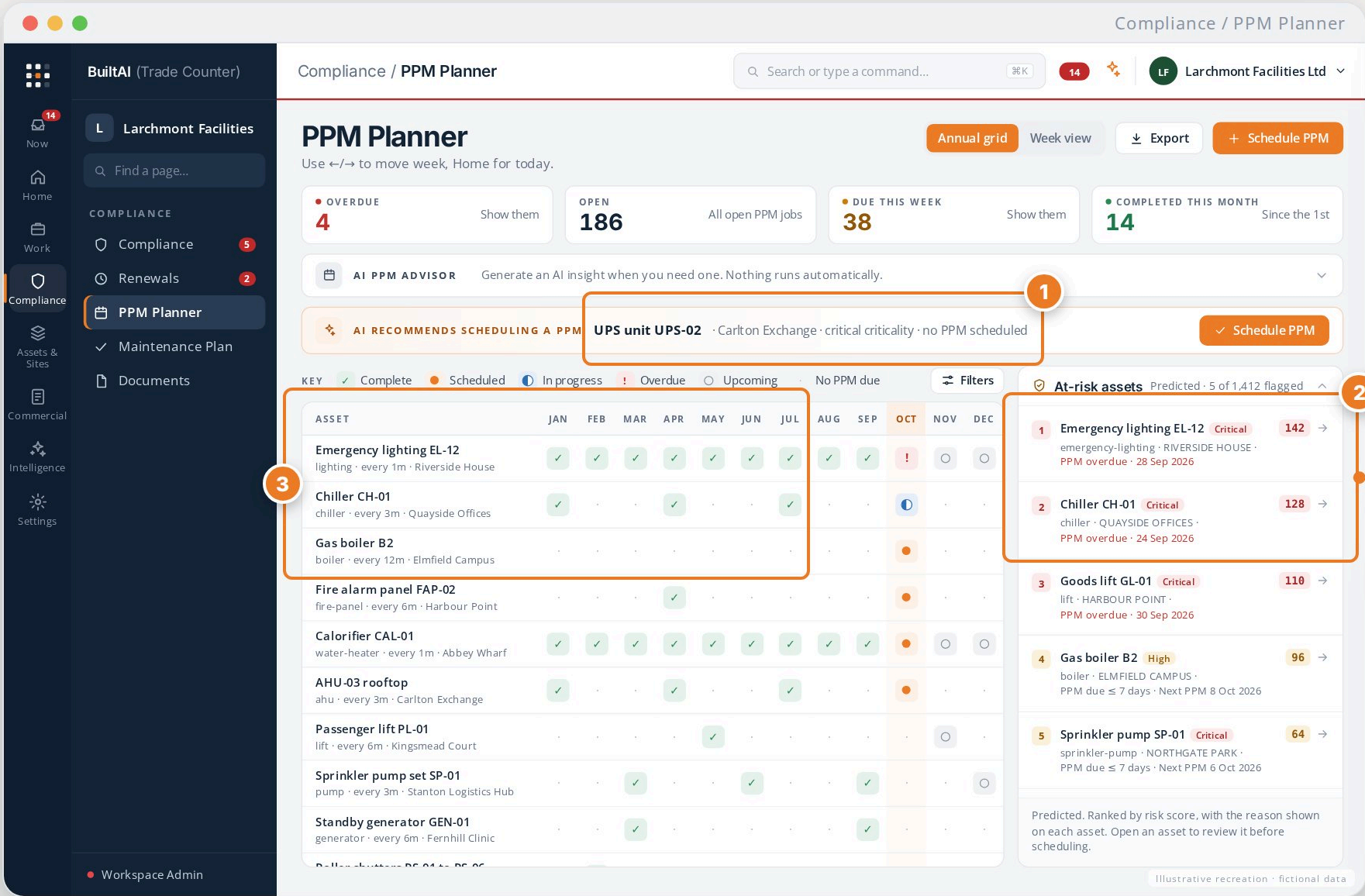
3 Findings with countdowns

Each finding has a site, an owner and a due date, with a live countdown.

SITE	ASSIGNED	DUE
HARBOUR POINT	AK Aisha K.	9 Oct 20267d

Planned maintenance that flags what needs planning.

An annual grid and a week view, SFG20 checklist import, and AI that flags the gaps.



1 AI recommends scheduling a PPM

A critical asset with no PPM scheduled is flagged, with the reason on the same line.

UPS unit UPS-02 · Carlton Exchange · critical criticality · no PPM scheduled

2 Predicted at-risk assets

Ranked by risk score, each with its reason, such as PPM overdue.

1 Emergency lighting EL-12 (Critical) 142 →
emergency-lighting · RIVERSIDE HOUSE ·
PPM overdue · 28 Sep 2026

2 Chiller CH-01 (Critical) 128 →
chiller · QUAYSIDE OFFICES ·
PPM overdue · 24 Sep 2026

3 The annual grid

Each asset by month, with its PPM cadence and completed visits ticked.

ASSET	JAN	FEB	MAR	APR	MAY	JUN	JUL
Emergency lighting EL-12 lighting · every 1m · Riverside House	✓	✓	✓	✓	✓	✓	✓
Chiller CH-01 chiller · every 3m · Quayside Offices	✓			✓			✓
Gas boiler B2 boiler · every 12m · Elmfield Campus							

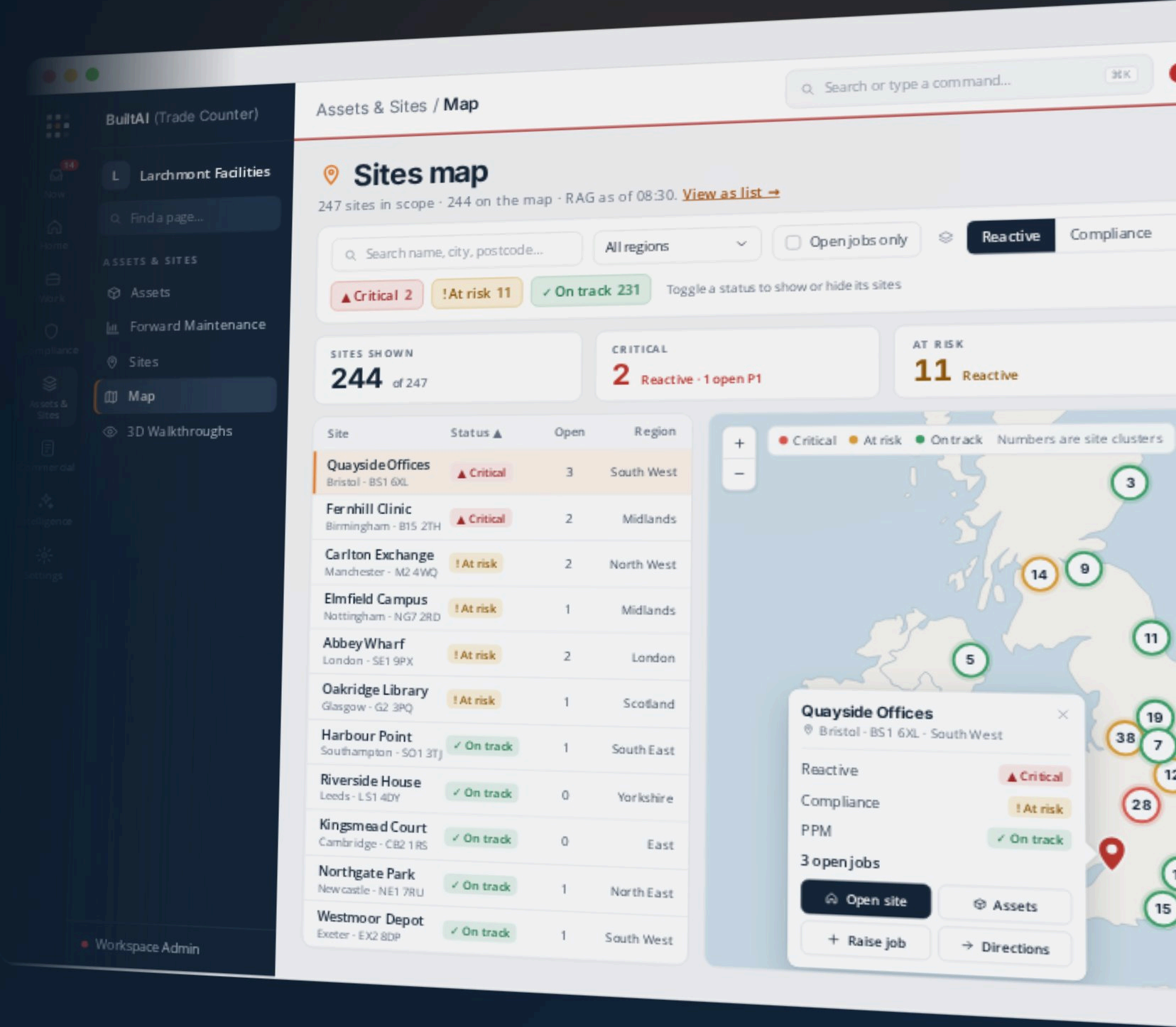
03

CHAPTER 03

Assets and sites

Know where everything is, what state it is in, and when it needs replacing.

- Maps and sites
- Forward maintenance and capex



See the estate. Act from the map.

Your sites plotted and graded across three layers, with the actions you need right on the pin.

Now

14

Home

Work

Compliance

Assets & Sites

Commercial

Intelligence

Settings

BuiltAI (Trade Counter)

L Larchmont Facilities

Find a page...

ASSETS & SITES

Assets

Forward Maintenance

Sites

Map

3D Walkthroughs

Assets & Sites / Map

Search or type a command...

14

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Sites map

247 sites in scope · 244 on the map · RAG as of 08:30. [View as list →](#)

Search name, city, postcode...

All regions

Open jobs only

Reactive

Compliance

PPM

Reset

SITES SHOWN

244 of 247

CRITICAL

2 Reactive · 1 open P1

AT RISK

11 Reactive

ON TRACK

231 Reactive

Site	Status ▲	Open	Region
Quayside Offices Bristol · BS1 6XL	▲ Critical	3	South West
Fernhill Clinic Birmingham · B15 2TH	▲ Critical	2	Midlands
Carlton Exchange Manchester · M2 4WQ	! At risk	2	North West
Elmfield Campus Nottingham · NG7 2RD	! At risk	1	Midlands
Abbey Wharf London · SE1 9PX	! At risk	2	London
Oakridge Library Glasgow · G2 3PQ	! At risk	1	Scotland
Harbour Point Southampton · SO1 3TJ	✓ On track	1	South East
Riverside House Leeds · LS1 4DY	✓ On track	0	Yorkshire
Kingsmead Court Cambridge · CB2 1RS	✓ On track	0	East
Northgate Park Newcastle · NE1 7RU	✓ On track	1	North East
Westmoor Depot Exeter · EX2 8DP	✓ On track	1	South West

Quayside Offices

Bristol · BS1 6XL · South West

Reactive ▲ Critical

Compliance ! At risk

PPM ✓ On track

3 open jobs

Open site

Assets

+ Raise job

→ Directions

1 Filter by layer

Switch between Reactive, Compliance and PPM layers, or show open jobs only.

☐ Open jobs only



Reactive

Compliance

PPM

2 The site list

Each site with its status, open jobs and region, here sorted by status.

Site	Status ▲	Open	Region
Quayside Offices Bristol · BS1 6XL	▲ Critical	3	South West
Fernhill Clinic Birmingham · B15 2TH	▲ Critical	2	Midlands

3 Act from the pin

Open site, Assets, Raise job or Directions, with a RAG status for each layer.

Quayside Offices

Bristol · BS1 6XL · South West

Reactive

▲ Critical

Compliance

! At risk

PPM

✓ On track

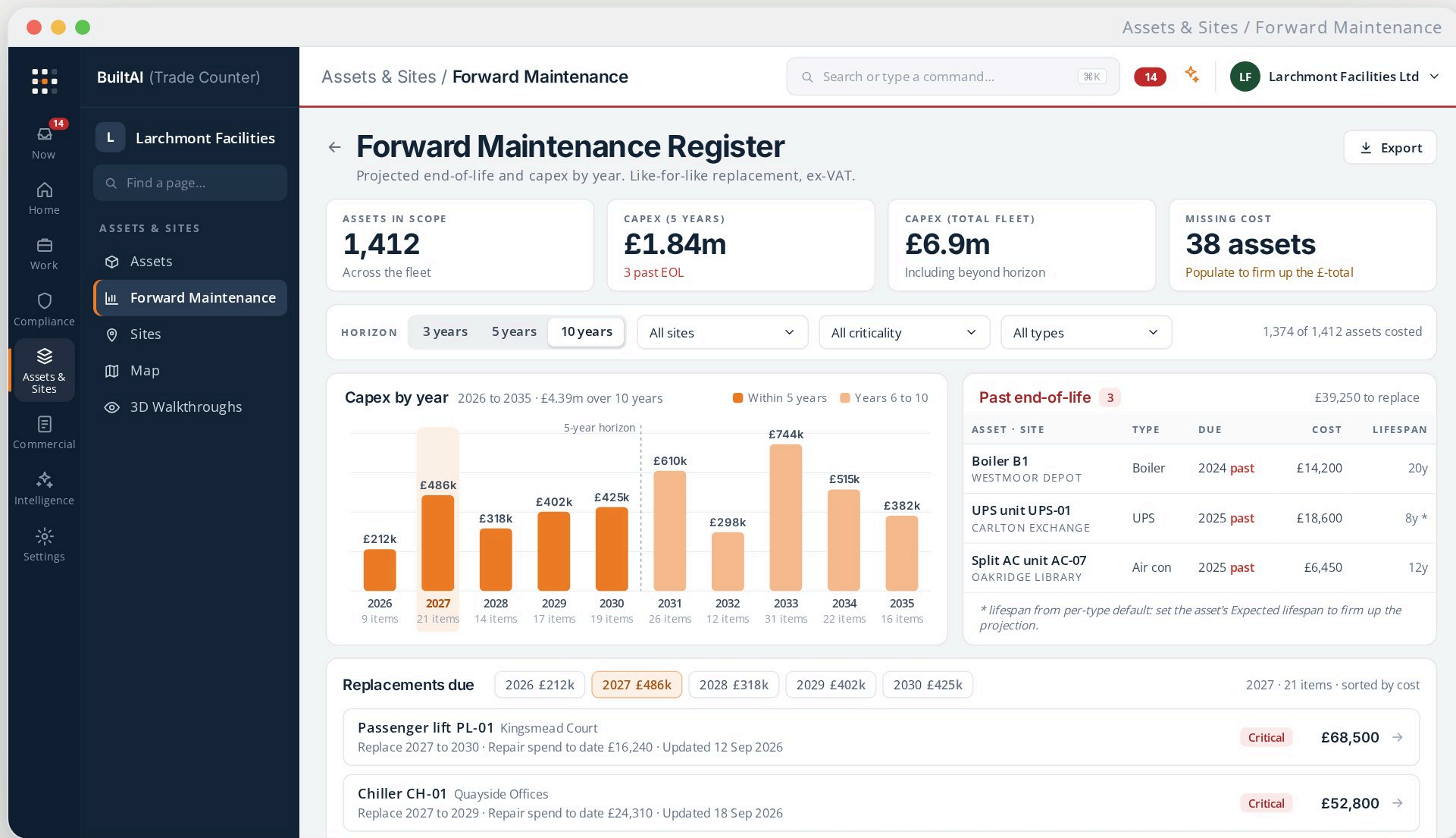
3 open jobs

Open site

Assets

+ Raise job

→ Directions



ASSETS AND SITES · LIFECYCLE

Know what to replace, and when.

An asset register that feeds a capex forecast, so lifecycle decisions are planned, not discovered.

- 1 Capex by year**
Like-for-like replacement, ex-VAT, over a horizon of 3, 5 or 10 years.
- 2 End of life, flagged**
Assets past end-of-life, and a per-year replacement list with repair spend to date.
- 3 Missing cost prompts**
Shows which assets still need a replacement cost or lifespan, so the forecast stays honest.
- 4 A full asset register**
Criticality, PPM cadence, last test, hierarchy and a downloadable PPM pack per asset.

04

CHAPTER 04

Commercial

From scope to appointed supplier to paid invoice, with the money under control.

- Enquiries and bid review
- Financials
- Suppliers
- Clients and suppliers



From scope to appointed supplier, in one flow.

Send scopes to approved suppliers, compare the returns side by side, and appoint the winning bid.

Now

14

Home

Work

Compliance

Assets & Sites

Commercial

Intelligence

Settings

Workspace Admin

Commercial / Enquiries

Commercial / Enquiries

Search or type a command...

14

LF Larchmont Facilities Ltd

Enquiries

Distribute scopes of works to your approved suppliers, track pricing returns and appoint the winning bid.

← All enquiries

Export

New enquiry

1

ENQ-148 AHU-02 supply fan replacement, Quayside Offices

reviewing

RAMS required

Scope of works · 6 items

Draft

Sent

3

Reviewing

4

Appointed

Quayside Offices, Newcastle · Return by 2 Oct 2026 · Budget estimate £22,500 · Raised by Hannah R.

Response tracker (5 invited)

PRICED RETURNS

4 of 5 returned

Quillmere Mechanical

Priced

£21,640 exVAT

✓ Verify figure

Appoint

Sent 23 Sep 2026 · acknowledged 23 Sep · priced 26 Sep 2026

INCLUDES

EXCLUDES

PROGRAMME

EC fan, commissioning, BMS re-tune

Builders work, out-of-hours

1 week lead, 4 days on site

2

Dunmarrow Air Systems

Priced

£19,850 exVAT

✓ Verify figure

Appoint

Sent 23 Sep 2026 · acknowledged 24 Sep · priced 29 Sep 2026

INCLUDES

EXCLUDES

PROGRAMME

Fan + motor, 12-month warranty

Commissioning, BMS works

3 weeks lead, 5 days on site

Talveth HVAC Services

Priced

£23,480 exVAT

✓ Verify figure

Appoint

Sent 23 Sep 2026 · acknowledged 24 Sep · priced 30 Sep 2026

INCLUDES

EXCLUDES

PROGRAMME

Fan, motor, AV mounts, commissioning

Crane hire, access equipment

2 weeks lead, 6 days on site

Orlinde Building Services

Priced

£18,920 exVAT

✓ Verify figure

Appoint

Sent 23 Sep 2026 · acknowledged 25 Sep · priced 1 Oct 2026

INCLUDES

EXCLUDES

PROGRAMME

Belt-drive fan, commissioning

Controls, electrical isolation

4 weeks lead, 3 days on site

3

Tarvell Electrical Services

Acknowledged

Sent 23 Sep 2026 · acknowledged 24 Sep 2026

Return due today

AI bid review · Draft

4 priced returns, 1 outstanding

Budget estimate £22,500 · return by 2 Oct 2026

SUPPLIER	LEAD	PRICE
Quillmere Mechanical	1 week	£21,640
Dunmarrow Air Systems	3 weeks	£19,850
Talveth HVAC Services	2 weeks	£23,480
Orlinde Building Services	4 weeks	£18,920
Tarvell Electrical Services	Awaiting	Due today

BEFORE YOU APPOINT

✓ Verify each figure against the supplier's return.

✓ Check includes and excludes against the scope.

✓ Confirm RAMS, required on this enquiry.

Advisory only. A person verifies figures and appoints.

Send to suppliers

Approved suppliers only.

Drummel Building Services

HVAC, Mechanical, Plant · Silver

Send

1 Tracked to appointment

Each enquiry shows its stage on the way to Appointed, with RAMS flagged and the scope attached.

RAMS required

Scope of works · 6 items

3

Reviewing

4

Appointed

2 AI bid review, as a draft

A draft summary of the priced returns: supplier, lead time and price. A person appoints.

AI bid review · Draft

4 priced returns, 1 outstanding

Budget estimate £22,500 · return by 2 Oct 2026

SUPPLIER	LEAD	PRICE
Quillmere Mechanical	1 week	£21,640
Dunmarrow Air Systems	3 weeks	£19,850
Talveth HVAC Services	2 weeks	£23,480
Orlinde Building Services	4 weeks	£18,920
Tarvell Electrical Services	Awaiting	Due today

3 Priced returns

Each return with its price ex VAT, dates, includes and excludes.

Dunmarrow Air Systems

Priced

£19,850 exVAT

Sent 23 Sep 2026 · acknowledged 24 Sep · priced 29 Sep 2026

INCLUDES

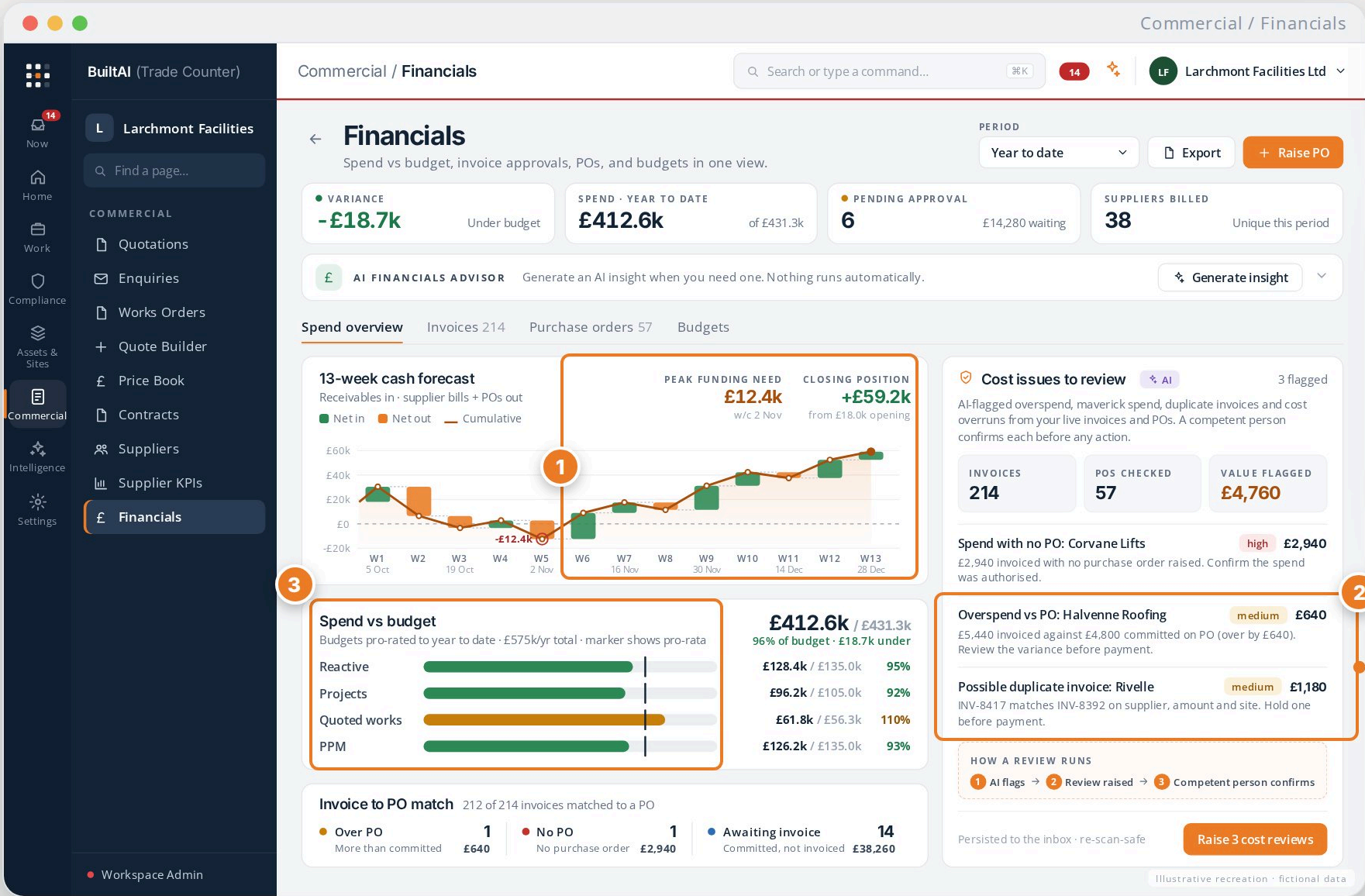
Fan + motor, 12-month warranty

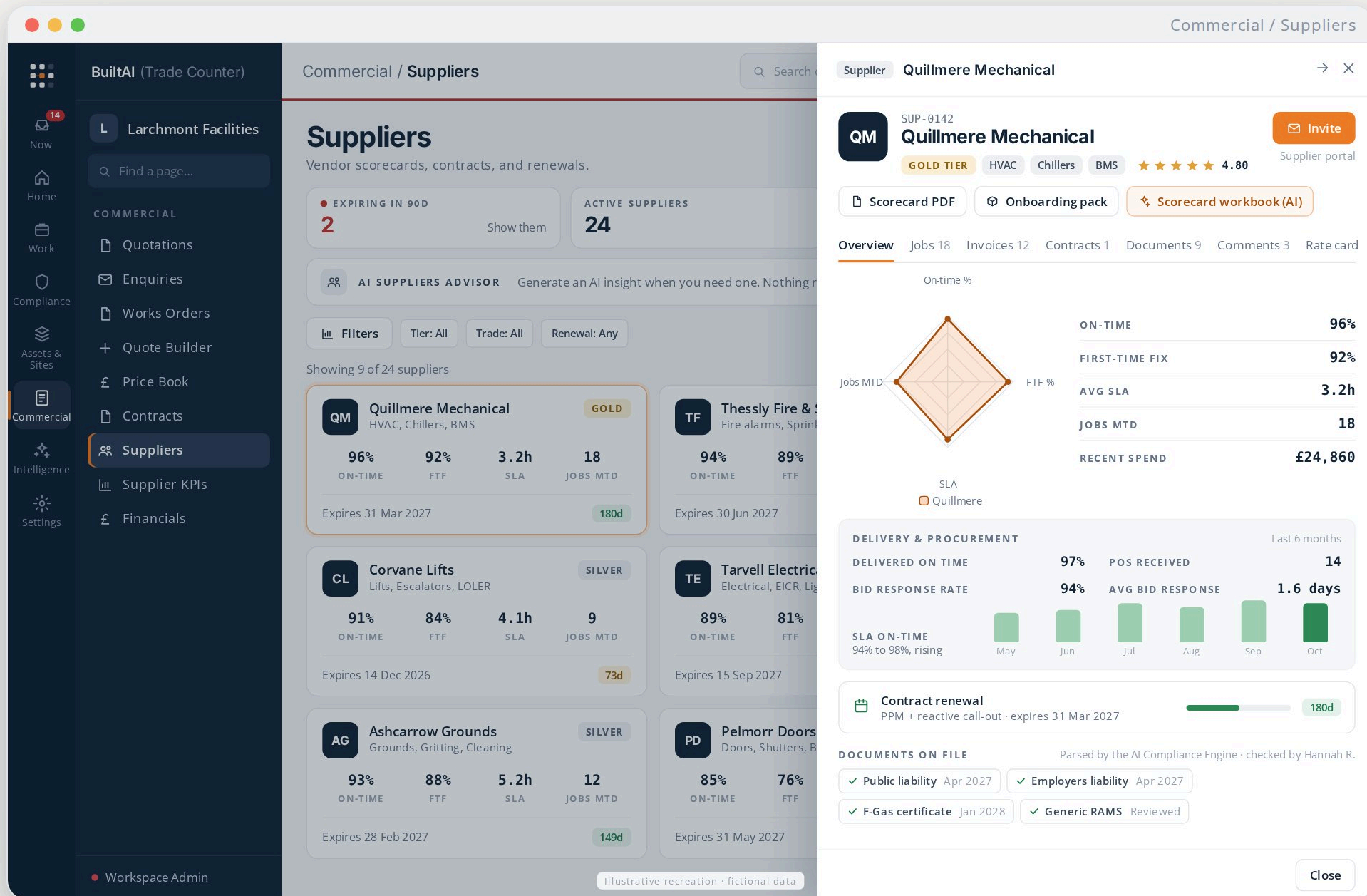
EXCLUDES

Commissioning, BMS works

Spend, cash and invoices under control.

A 13-week cash forecast, spend against budget, invoice approvals and AI that flags money leaking out. Approved bills push to Xero as draft bills.





COMMERCIAL · SUPPLIERS

Know which suppliers deliver.

Scorecards, tiers and KPIs across the whole supplier roster, with a portal for them to work in.

- 1 Scorecards and tiers**
Tier chips alongside on-time, first-time-fix, SLA and jobs-this-month for every supplier.
- 2 Radar scorecard**
A radar chart for each supplier, with delivery and procurement metrics and a star rating.
- 3 Supplier portal**
Invite suppliers, approve or decline applications, and collect documents and comments.
- 4 Packs on demand**
Scorecard PDF, onboarding pack and an AI scorecard workbook.

Clients in the loop. Suppliers too.

Give clients a portal and simple public links, and give suppliers a place to work with you.

- 1

Client portal

Requests, approvals, quotations, invoices, compliance, ESG and the AI Assistant, for the Customer role.
- 2

Review and accept

Clients accept a quote with a typed name, at a price held for 30 days.
- 3

Track my request

A read-only progress link for whoever raised the job, plus invoice PDF links.
- 4

Satisfaction and QR reporting

CSAT by site and supplier, and an occupant QR portal with AI-graded urgency.

Review & accept · no login needed

L

Larchmont Facilities

Quote for your review

Secure link · no login needed

Sent with BuiltAI (Trade Counter)

Q-2291

Awaiting your acceptance

AHU-01 belt kit and filter change

PREPARED FOR

Kestrow Estates Ltd

Daniel K.

SITE

Riverside House

Leeds LS1

ISSUED

1 Oct 2026

Ref JOB-2458

PREPARED BY

Hannah R.

Larchmont Facilities

ITEM	QTY	UNIT	AMOUNT
AHU-01 drive belt kit Matched set of 3 belts, supplied	1 set	£186.00	£186.00
G4 panel and F7 bag filters Full replacement set for AHU-01	1 set	£412.00	£412.00
Engineer labour: belts Fit belts, tension and align pulleys	4 h	£58.00	£232.00
Engineer labour: filters Change filters, check differential pressure	2 h	£58.00	£116.00
Access equipment Mobile tower, 1 day	1	£140.00	£140.00
Waste removal Used filters, waste transfer note	1	£45.00	£45.00
Commissioning and report Run-up checks and service report	1	£95.00	£95.00
Total ex VAT			£1,226.00
VAT at 20%			£245.20
Total			£1,471.20

Works carried out in normal hours with the AHU isolated by our engineer. RAMS issued to site before attendance. Belts were found worn and glazed on the visit of 30 Sep 2026; photos are attached to your request.

ATTACHMENTS

Site photos (3)

Quote Q-2291.pdf

Terms and conditions

PUBLIC LINK 1 · REVIEW & ACCEPT

£1,471.20 inc VAT

£1,226.00 ex VAT · £245.20 VAT

Price held until 31 Oct 2026

30-day price lock from the date of issue

Type your full name to accept

Daniel K

✓

Your typed name confirms acceptance of quote Q-2291.

✓ Accept quote

Download PDF

Track my request

Public link 2 · read-only

AHU-01 noisy and vibrating · Riverside House

✓ Logged

29 Sep 2026, 09:12 · REQ-418

✓ Scheduled

Engineer attended 30 Sep 2026

○ In progress

Quote Q-2291 waiting for your acceptance

○ Completed

Service report sent on completion

Tracking link valid for 90 days · updates as the job moves

Trade Counter is a BuiltAI product

Illustrative recreation · fictional data

 Trade Counter
BY BUILT AI

04 COMMERCIAL

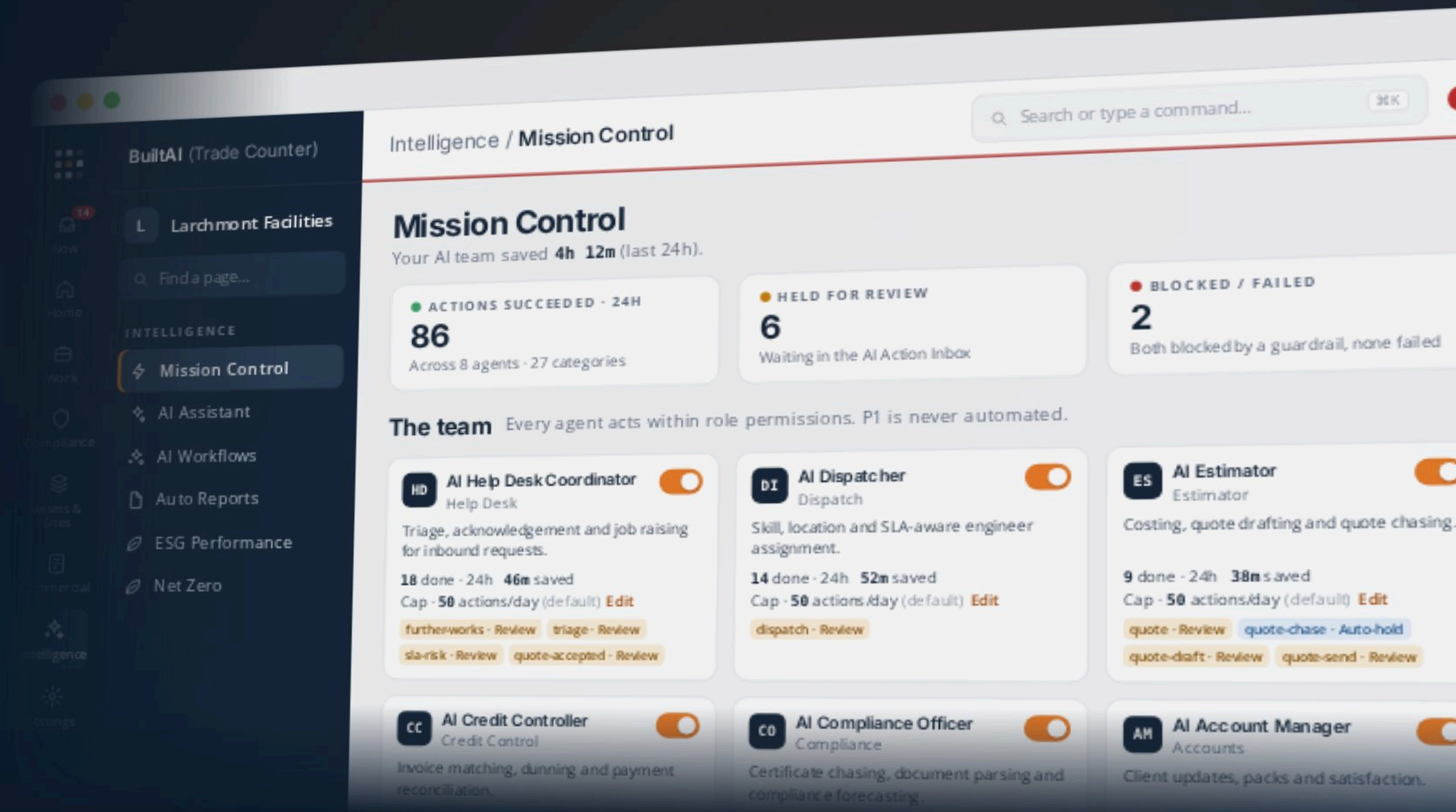
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05

CHAPTER 05

Intelligence

AI that drafts and chases. People who decide.



34

governed AI workflows

in 8 groups, from scope builder to board pack

8

AI agents

each with its own desk, remit and daily cap

4

autonomy rungs

Off, Review, Auto-hold, Auto-now. You set them; they take effect once earned

0

P1 jobs automated

P1s always wait for a human, whatever the rung

Brief in, draft out. A person decides.

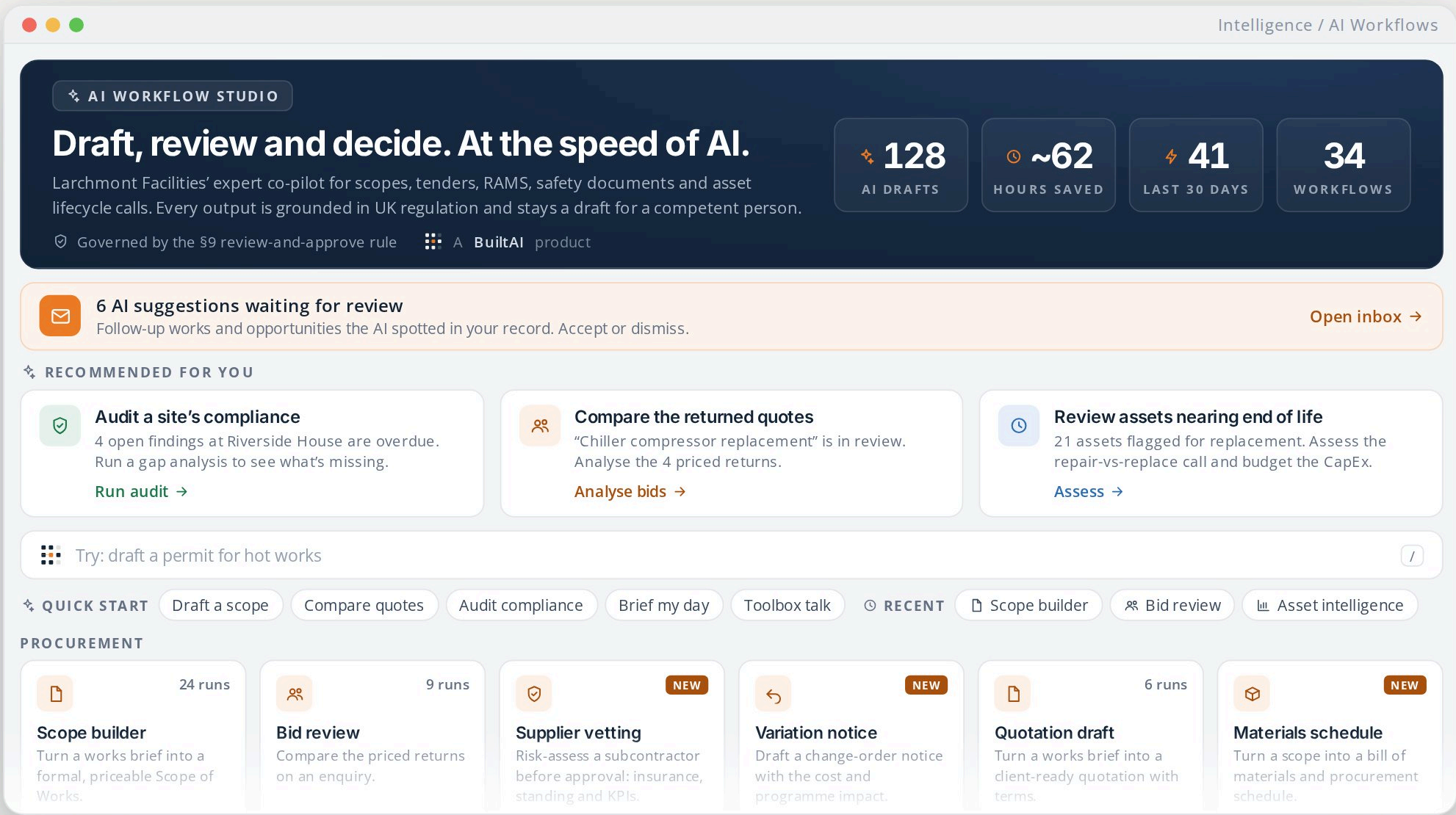
34 governed workflows turn a short brief into an editable draft. A competent person reviews it.

- 1

Suggestions waiting
Follow-up works and opportunities the AI spotted in your record, to accept or dismiss.
- 2

Recommended for you
Data-driven prompts: audit a site, compare returned quotes or assess end-of-life assets.
- 3

Ask in plain English
A command bar and quick starts, with Word and Excel outputs ready to edit.



— Illustrative recreation on fictional data

34 workflows. One rule: every output stays a draft for a competent person.

Procurement

6

- Scope builder
- Bid review
- Supplier vetting
- Variation notice
- Quotation draft
- Materials schedule

Assets & lifecycle

4

- Asset intelligence
- Condition report
- Warranty claim
- PPM schedule (SFG20)

Safety & compliance

11

- RAMS review
- Risk assessment (5×5)
- Method statement
- RAMS pack composer
- Compliance gap analysis
- Certificate ingestion
- Compliance forecast
- Toolbox talk
- Permit to work
- Incident report (RIDDOR prompt)
- Site induction

Operations

6

- Photo intel
- Job-sheet scan
- Reactive cost estimate
- Occupier notice
- AI Briefings
- Snagging list

Documents

3

- Client update
- Meeting minutes
- Handover certificate

Reporting

1

- Board-pack composer

Bespoke

2

- AI Autopilot
- Custom workflows

Finance

1

- Invoice 3-way match

GUIDED JOURNEYS

Procure new works · 3 steps

Mobilise a contractor safely · 5 steps

Plan asset CapEx · 3 steps

Report to the client · 3 steps

Your AI team, managed like a team.

Eight agents with clear remits: Help Desk, Dispatch, Estimator, Buyer, Credit Control, Compliance, Accounts and Data Steward. Pause them all with one button.

14

Now

Home

Work

Compliance

Assets & Sites

Commercial

Intelligence

Settings

BuiltAI (Trade Counter)

L Larchmont Facilities

Find a page...

MISSION CONTROL

AI Assistant

AI Workflows

Auto Reports

ESG Performance

Net Zero

Intelligence / Mission Control

Search or type a command...

96 K

14

LF Larchmont Facilities Ltd

Run agents now

MISSION CONTROL

Your AI team saved 4h 12m (last 24h).

ACTIONS SUCCEEDED · 24H

86

Across 8 agents · 27 categories

HELD FOR REVIEW

6

Waiting in the AI Action Inbox

BLOCKED / FAILED

2

Both blocked by a guardrail, none failed

TIME SAVED · 24H

4h 12m

↑ 38m vs previous 24h

The team

Every agent acts within role permissions. P1 is never automated.

Pause all agents

HD AI Help Desk Coordinator

Help Desk

Triage, acknowledgement and job raising for inbound requests.

18 done · 24h 46m saved

Cap · 50 actions/day (default) Edit

further-works · Review triage · Review

sla-risk · Review quote-accepted · Review

DI AI Dispatcher

Dispatch

Skill, location and SLA-aware engineer assignment.

14 done · 24h 52m saved

Cap · 50 actions/day (default) Edit

dispatch · Review

ES AI Estimator

Estimator

Costing, quote drafting and quote chasing.

9 done · 24h 38m saved

Cap · 50 actions/day (default) Edit

quote · Review quote-chase · Auto-hold

quote-draft · Review quote-send · Review

BU AI Buyer

Buyer

Bills of materials, RFQ broadcast, chasing and bid scoring.

6 done · 24h 22m saved

Cap · 50 actions/day (default) Edit

po-award · Review po-draft · Review

CC AI Credit Controller

Credit Control

Invoice matching, dunning and payment reconciliation.

12 done · 24h 34m saved

Cap · 50 actions/day (default) Edit

cost-review · Review invoice-send · Review

warranty-claim · Review invoice-draft · Review

invoice-dunning · Auto-hold

CO AI Compliance Officer

Compliance

Certificate chasing, document parsing and compliance forecasting.

11 done · 24h 29m saved

Cap · 50 actions/day (default) Edit

finding · Review cert-renewal · Review

rams · Review riddor · Review

AM AI Account Manager

Accounts

Client updates, packs and satisfaction.

8 done · 24h 17m saved

Cap · 50 actions/day (default) Edit

status-update · Review

csat-followup · Auto-hold client-reply · Review

DS AI Data Steward

Data Steward

Data-quality scanning and safe auto-fixes.

8 done · 24h 14m saved

Cap · 50 actions/day (default) Edit

data-fix · Auto-now time-entry · Review

Action ledger · last 24h

Actions your AI team takes (and holds, blocks or rolls back) appear here with their audit trail.

AGENT	ACTION	OUTCOME	SAVED	WHEN	WHY	UNDO
AI Dispatcher	Assigned Tom R. to JOB-2486 · Boiler lockout	Succeeded	6m	09:42	Gas Safe, 4.2 mi away, P2 SLA in 3h 10m	Undo
AI Estimator	Chased Q-2274 · AHU belt kit	Held · 15 min	4m	09:15	No reply in 5 working days, quote valid to 18 Oct	Undo
AI Estimator	Drafted Q-2281 · Lift door operator	Held for review	0m	08:57	Margin 14% is below the 20% floor	n/a

Illustrative recreation · fictional data

1 Held and blocked, in plain sight

Actions held for a person in the AI Action Inbox, and actions a guardrail blocked.

HELD FOR REVIEW

6

Waiting in the AI Action Inbox

BLOCKED / FAILED

2

Both blocked by a guardrail, none failed

2 Named agents with caps

On/off per agent, 50 actions a day by default, a rung for every action category.

HD AI Help Desk Coordinator
Help Desk



Triage, acknowledgement and job raising for inbound requests.

18 done · 24h 46m saved

Cap · 50 actions/day (default) Edit

further-works · Review triage · Review

sla-risk · Review quote-accepted · Review

DI AI Dispatcher
Dispatch



Skill, location and SLA-aware engineer assignment.

14 done · 24h 52m saved

Cap · 50 actions/day (default) Edit

dispatch · Review

3 Action ledger with Why and Undo

Each action carries its reason and an Undo button.

WHY

UNDO

Gas Safe, 4.2 mi away, P2 SLA in 3h 10m

Undo

No reply in 5 working days, quote valid to 18 Oct

Undo

1 Why did the agent do this?

The evidence behind a suggestion: confidence, the job and site, and the figures.

EVIDENCE			
Confidence	high	Source	Unbilled jobs
Job	JOB-2471	Days unbilled	12
Site	Abbey Wharf	Value	£1,860.00

Request triage · Helpdesk

Requests classified for a job. P1s always wait.

100% accepted · 9 decisions

Engineer dispatch · Helpdesk

Triaged jobs assigned. P1 is never auto

96% accepted · 24 decisions

Cost reviews · Finance

Overspend, maverick spend and duplicates.

88% accepted · 8 decisions

Review

Off

✓ Review

current

Auto-hold: announce, hold

Earned

Auto-now

needs ≥20

Quote chasing · Finance
Always announces before sending.
100% accepted · 11 decisions
Earned · **Auto-hold** Caps at Auto-hold
P1 is never automated. Hold window 15 minutes.



Automation that has to earn your trust.

Off

The agent does not act in this category.

Review

The default. Every action waits in the inbox for a person.

Auto-hold

Announce, hold, then act unless vetoed. Earned at ≥85% accepted over ≥5 decisions.

Auto-now

Acts instantly. Earned at ≥92% over ≥20 decisions, with no undo in the last 20 runs.

Until a rung is earned it runs one step down. Overnight, only instant actions that can be undone commit; everything else waits for the morning digest.

WHERE THE AI SUGGESTS THE NEXT ACTION

NOW

Fix with AI on any suggestion

PPM PLANNER

AI recommends a PPM

FINANCIALS

Raise cost reviews from AI flags

JOBS

AI suggests wrapping up a job

WORKFLOWS

Recommended for you cards

EVERY PAGE

An AI Advisor, on demand only

BUILT-IN LIMITS

P1 never automated · 50 actions a day per agent by default ·
template-locked sends, one per invoice or quote · Ask AI: 6 steps a
plan, 100 actions a person a day

Intelligence / AI Assistant

Which sites have certificates expiring this month, and what's booked?

HR

✦

This month **6 certificates** expire across **5 sites**. **4 are already booked** for renewal before they lapse, and **2 need booking**.

SITE	CERTIFICATE	EXPIRES	BOOKED
Riverside House	Emergency lighting [CERT-3104]	9 Oct	[JOB-2461] 6 Oct
Elmfield Campus	Gas safety CP12 [CERT-3117]	12 Oct	[JOB-2468] 10 Oct
Harbour Point	Fire alarm service [CERT-3122]	17 Oct	[JOB-2473] 15 Oct
Kingsmead Court	Legionella RA [CERT-3129]	21 Oct	Not booked
Harbour Point	EICR 5-yearly [CERT-3131]	24 Oct	[JOB-2479] 22 Oct
Oakridge Library	LOLER exam [CERT-3140]	29 Oct	Not booked

Kingsmead Court is the tighter one, with **19 days** left. I can draft a job there for your approval; nothing is raised until you confirm.

🔍 Queried certificates

🔍 Queried jobs

📄 Copy

↶ Regenerate

👍

💬

⚡ Draft job for Kingsmead Court

📄 Export as CSV

📅 Show on calendar

■ INTELLIGENCE · AI ASSISTANT

Ask anything about your estate.

An operations co-pilot that queries live records, cites its sources and takes action once you confirm.

- **Find and summarise:** answers with figures and clickable record citations
- **Reports and exports:** PDFs and CSVs on request
- **Take action:** one tap, with a confirm, never beyond the person's own permissions
- **Analyse and forecast** from your live records
- **Everywhere:** a slide-out assistant on every page, and voice input in the composer

Build it once. It runs every month.

Pick a template, tick the sections and check the live preview. Then schedule it, or compose it with AI.

- 1

8 templates

Exec monthly, Compliance pack, Spend review, Supplier scorecard, PPM adherence, A3 Executive dashboard, Carbon and ESG (SECR) and Custom.
- 2

Schedule it

Daily, weekly or monthly, with a first run date and email recipients.
- 3

Compose with AI

Let AI draft the narrative, with history, download and share for every run.

Intelligence / Auto Reports

Sections6 of 7

☒Cover

...

☒Exec summary

...

☒Compliance

...

☐PPM adherence

...

☒Jobs

...

☒Financials

...

☒Suppliers

...

Schedule

Run now

Compose with AI

Schedule Exec monthly

CADENCEMonthly

FIRST RUN02/11/2026

RECIPIENTSHannah P. × Marcus D. × +2

Cancel

Save schedule

Live previewPDF-styled · sample

EXEC MONTHLY · SEPTEMBER 2026

Larchmont Facilities

Operations report · 247 sites · Generated 1 Oct 2026

Exec summary

A steady month. SLA position rose to **94%** (up 2.1 pp) and PPM attendance held at **97%** across 1,412 assets. 64 jobs remain open, 3 past SLA. 12 compliance findings are open, 2 critical; the CP12 at Elmfield Campus is booked for renewal on 9 Oct.

OPEN JOBS

64

↓ 9 vs Aug

SLA POSITION

94%

↑ 2.1 pp

PPM ATTENDANCE

97%

↑ 1 pp

OPEN FINDINGS

12

↓ 5 vs Aug

Jobs raised vs closed

SLA position · 6 months

Compliance

Financials & suppliers

Highlights

Larchmont Facilities Ltd · Exec monthly

Trade Counter · a BuiltAI product

Page 1 of 4

Illustrative recreation · fictional data

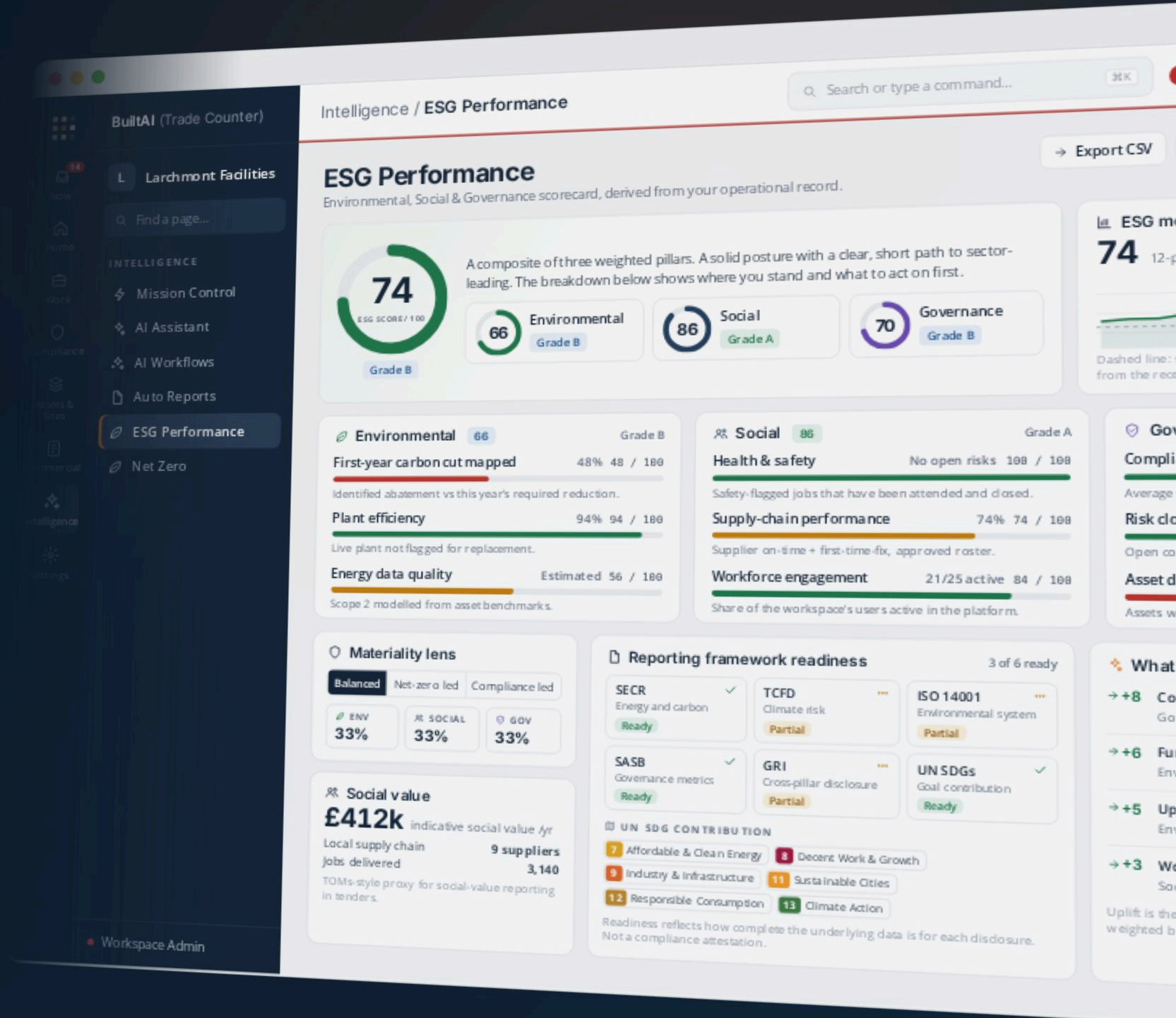
06

CHAPTER 06

Sustainability

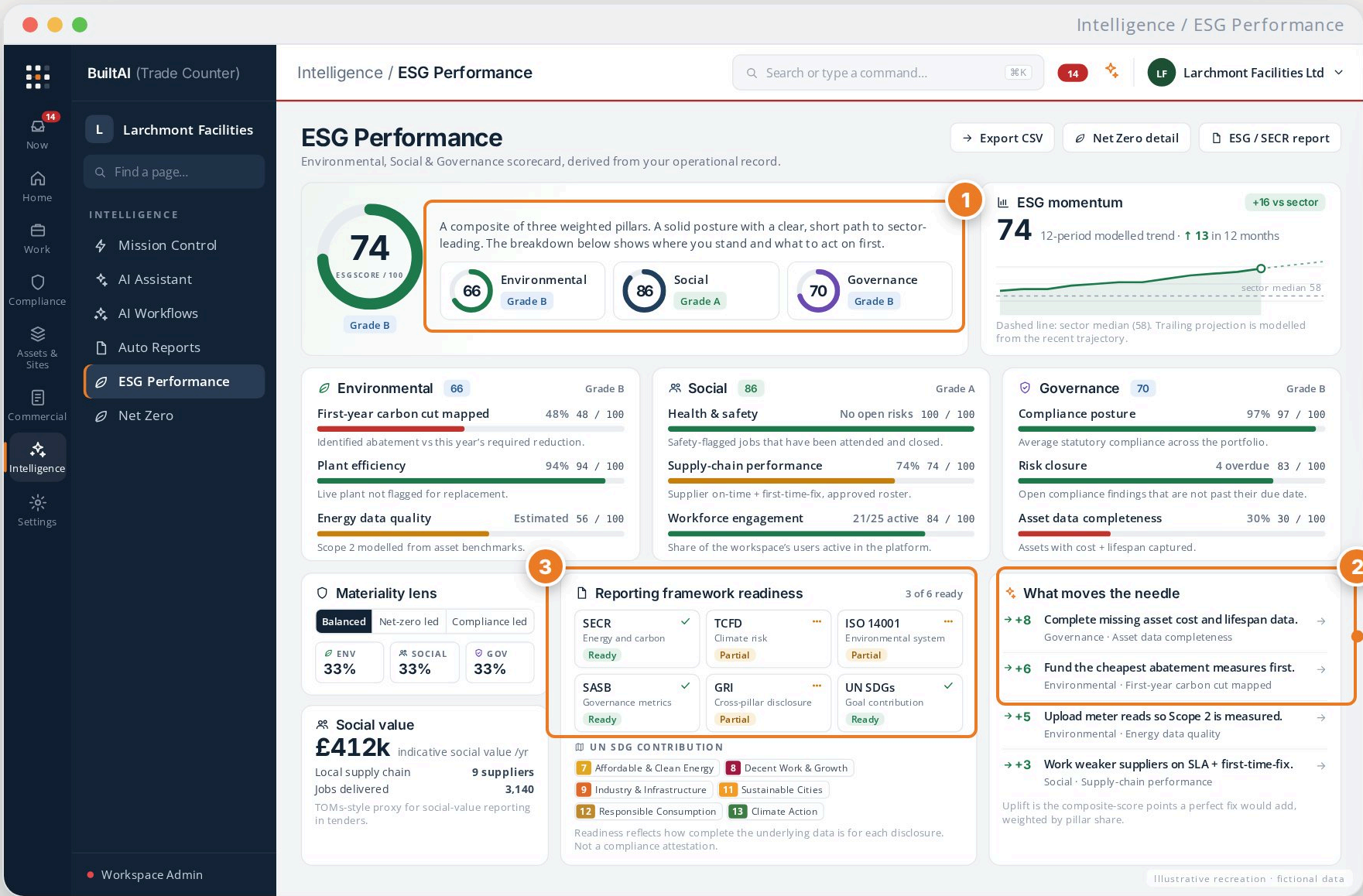
An ESG scorecard and a fundable net-zero pathway, built from the work you already do.

- ESG Performance
- Net Zero



An ESG scorecard built from the work you already do.

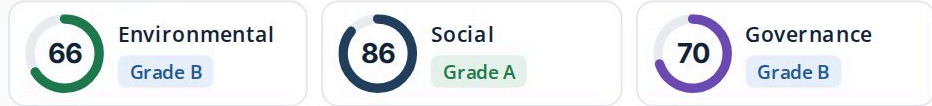
ESG scores from your operational record, with framework readiness and the next best move.



1 Three graded pillars

Environmental, social and governance scores, each graded, behind one weighted composite.

A composite of three weighted pillars. A solid posture with a clear, short path to sector-leading. The breakdown below shows where you stand and what to act on first.



2 What moves the needle

Ranked actions with the score uplift each would add.

- +8 Complete missing asset cost and lifespan data. Governance · Asset data completeness
- +6 Fund the cheapest abatement measures first. Environmental · First-year carbon cut mapped

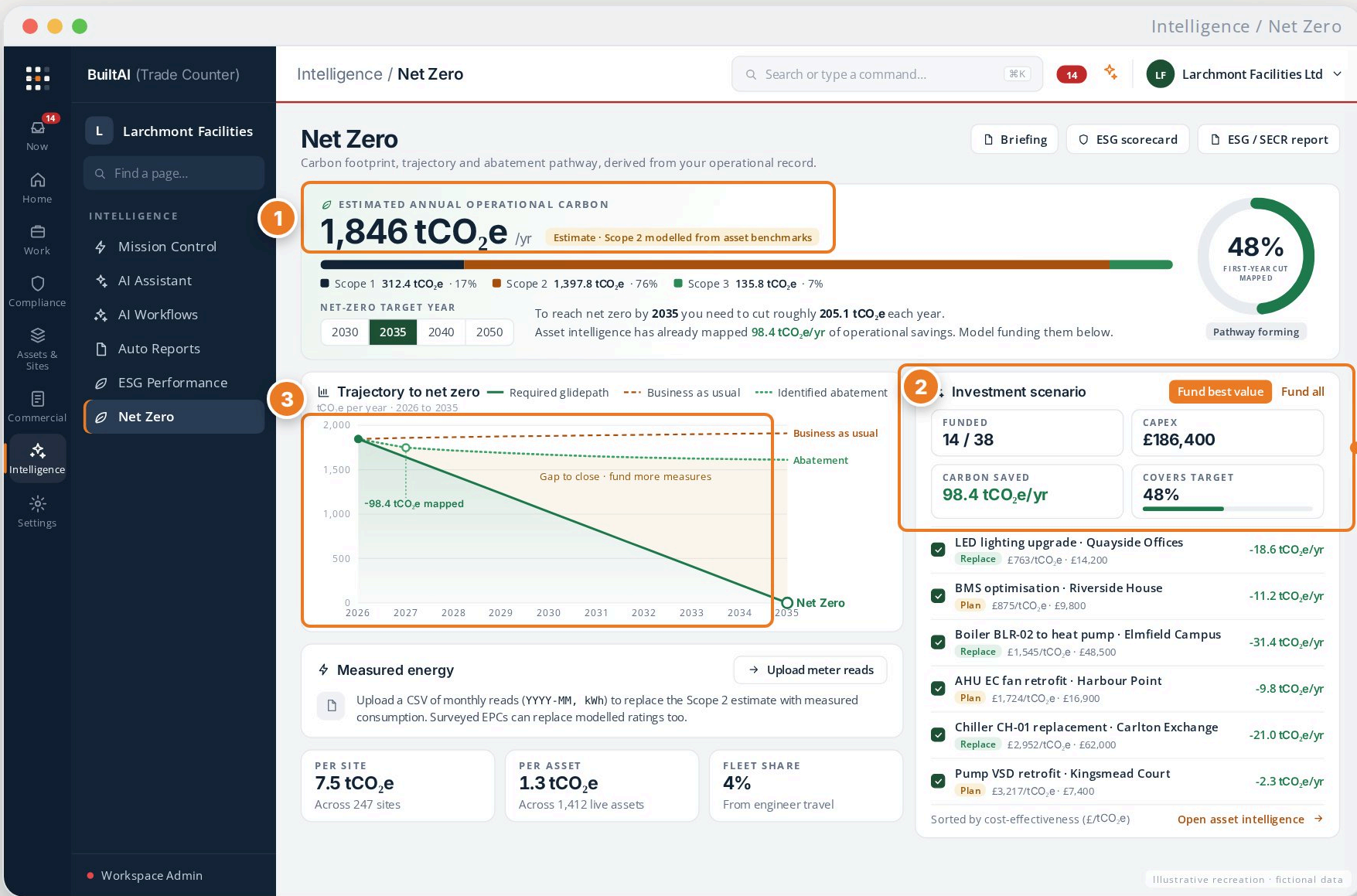
3 Framework readiness

SECR, TCFD, ISO 14001, SASB, GRI and UN SDGs, each marked ready or partial.

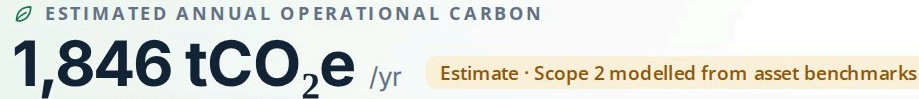


A net-zero pathway you can fund.

Scope 1, 2 and 3 carbon, a trajectory to your target year, and the investment scenario that gets you there. Upload meter reads to replace the Scope 2 estimate.



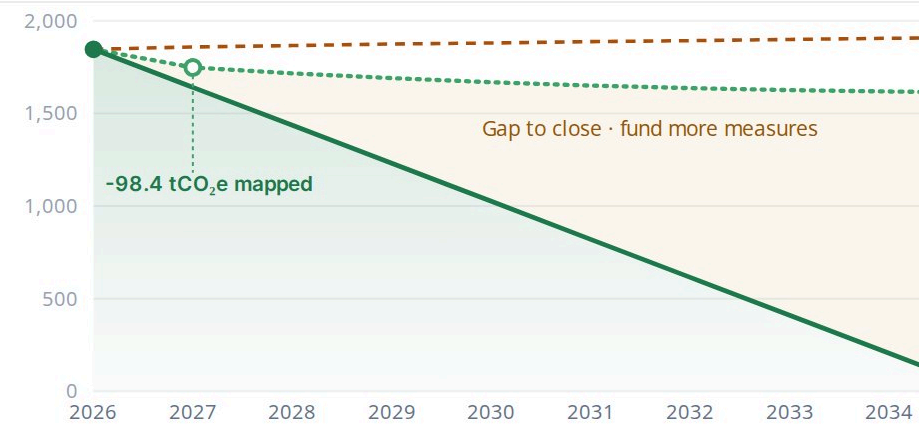
1 Carbon, honestly labelled
Annual operational carbon in tCO₂e, with the Scope 2 estimate marked as modelled from asset benchmarks.



2 Investment scenario
Fund best value or fund all, with capex, carbon saved and the share of target covered.



3 Trajectory to target
Solid: the required glidepath. Dashed: business as usual. Dotted: the abatement mapped so far.



Machines draft. **People sign.**

NOTHING RUNS BY DEFAULT

"Generate an AI insight when you need one. Nothing runs automatically."

DRAFTS FOR A COMPETENT PERSON

"Every output is grounded in UK regulation and stays a draft for a competent person."

NEVER BEYOND YOUR PERMISSIONS

"It can never do what that person could not do by hand."

UNDO, SAFELY

"Whoever ran an action can undo it, and Undo declines rather than overwriting a record someone has changed since."

GATES FOR EVERYONE

"Gates apply to everyone in this workspace, workspace admins included."

COMMERCIAL GUARDRAILS

"A quote below the floor, or one whose margin can't be verified, is held for review instead of going out."

5 roles × 29 permissions

Audit log and security events

Per-user two-factor authentication

Action ledger with Why and Undo

Approval thresholds and margin floors

Start alongside what you run. Connect what you need.



Data and integrations

Xero: approved supplier invoices pushed as draft bills. A Data Sources page listing available ERP, CAFM, IoT, finance and identity connectors, with sync status and field mapping.



In and out

Import SFG20 checklists, upload documents and meter reads, export CSV from almost every list, get Word and Excel from AI workflows and PDF reports.



Make it yours

White-label branding with your name, logo, colours and email footer. 12 optional modules, SLA defaults, approval rules, job gates and AI tone.



Built for the team

Installable app, command palette, density and high contrast modes, 3D walkthroughs from Matterport links, and a guided welcome tour.

✓ **No rip and replace.** Start Trade Counter alongside your current system on a few sites or one contract, prove it on real work, then decide. Your accounts system stays your ledger.

From first conversation to running, at your pace.

01

Overview

A short conversation about your estate, contracts and how the work runs today.

02

Walkthrough

The live workspace on demo data: dashboard, jobs, compliance, the AI team and reports.

03

Pilot workspace

Your own sites and a slice of real work, alongside your current system.

04

Onboarding

Sites, assets, PPM, users and branding set up with you, ready for daily use.

05

Prove and decide

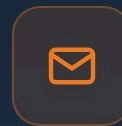
Review the evidence. Extend, keep it alongside, or stop.



You stay in control at every step. By default every AI action waits for a person, and nothing goes live until you are ready.

See it on your own estate.

A walkthrough of the live workspace, then a pilot on a few of your sites, alongside what you run today. No obligation, and you lead on timing.

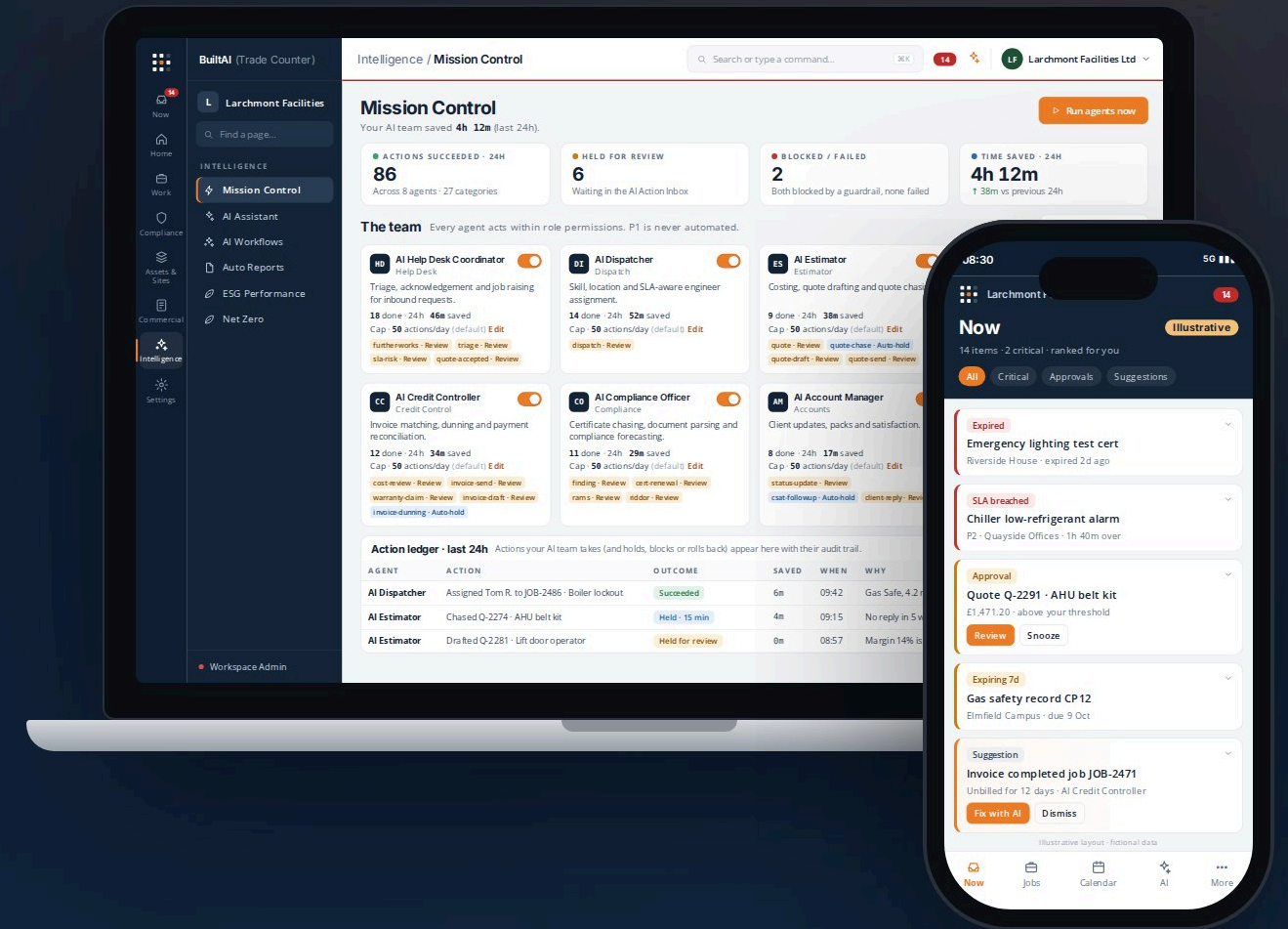


TALK TO US

hello@built-ai.io

built-ai.io · app.built-ai.io

BuiltAI Intelligence Ltd · Company No. 17269241 · BAI-TCO-2026-GEN · Rev C. Screens are illustrative recreations of the Trade Counter app on fictional data. Wallboard is shown as a preview feature; labels and modules depend on plan.



— Phone layout is illustrative