



Built AI

The Trade Counter™

PRODUCT BROCHURE · EDITION 2026.07

Stop Chasing The Operation. Start Running It.

The Trade Counter is the AI-native CAFM system from Built AI - for building owners, FM teams and the contractors who deliver the work. Compliance, maintenance, jobs and money in one governed workspace.

FM has always meant two systems that never quite agree - the owner's and the contractor's - plus bolt-on AI nobody will put their name to. The Trade Counter is one record both sides work, with AI a competent person signs off before it counts.

A BUILT AI PRODUCT



Built AI

built-ai.io

Smarter Facilities, Together.

The Trade Counter is the AI-native CAFM system from Built AI - for building owners, FM teams and the contractors who deliver the work. Compliance, maintenance, jobs and money in one governed workspace.

For Building Owners

See Every Building. Prove Every Certificate.



The Trade Counter

ONE RECORD OF THE JOB - END TO END

For Contractors & Suppliers

Win The Work. Deliver It.
Get Paid.

FM Manager

Engineer

Customer

Workspace Admin

Supplier Portal

34

GOVERNED AI
WORKFLOWS

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BUILT AI PACK TYPES

5

ROLE-AWARE VIEWS

13

LIVE WALLBOARD PANELS

Compliance

Never let a statutory certificate lapse unnoticed - the critical finding finds you before the audit does.

One record

Every job carries its evidence from enquiry to invoice - nothing lost between owner and contractor.

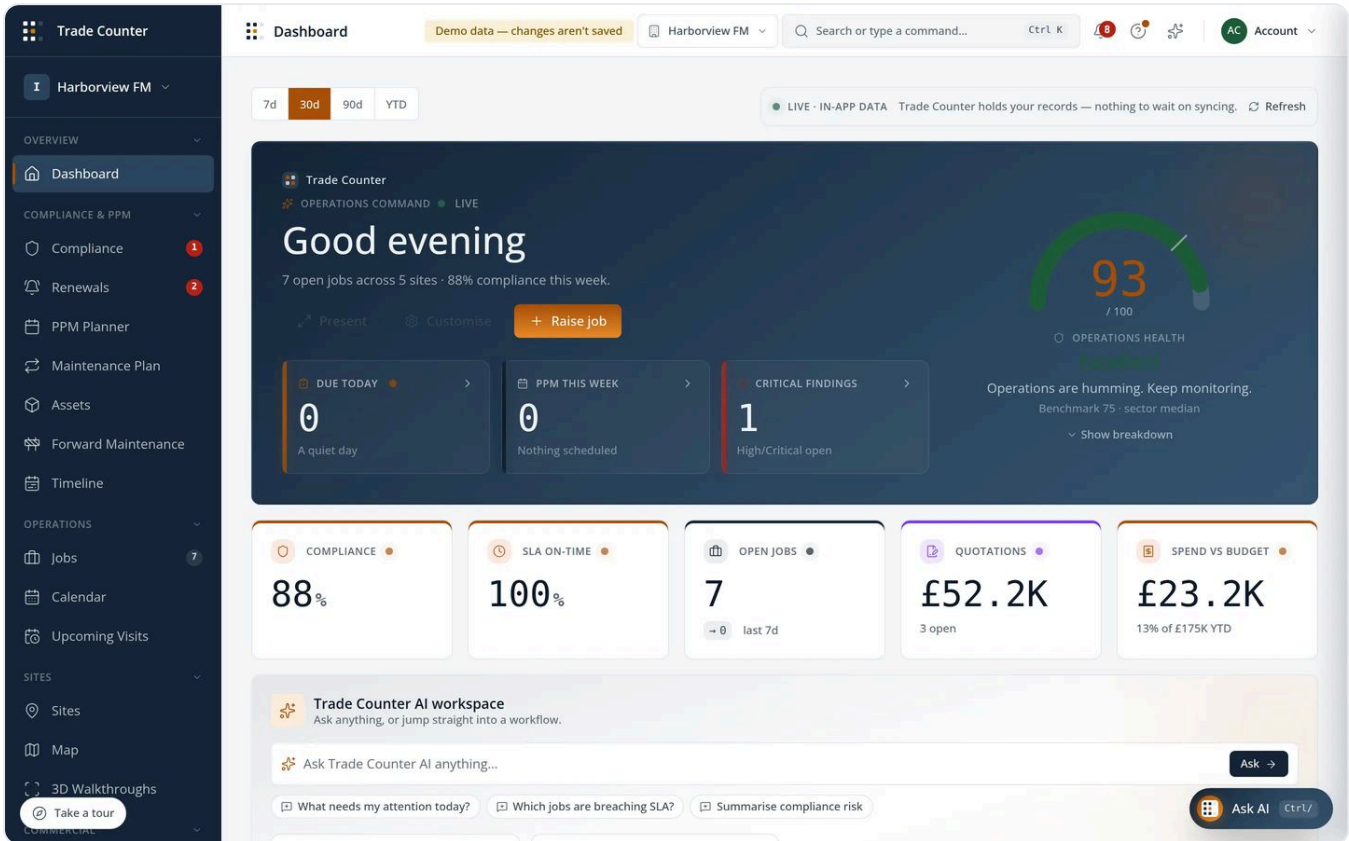
Board-ready

One number for operations health,
and packs your team hands to the
client without reformatting.

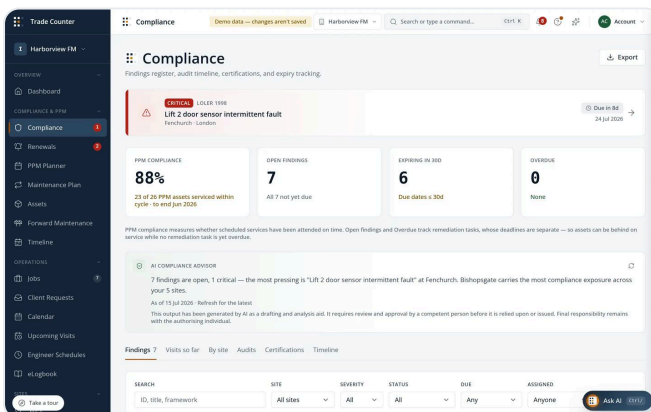
■ SEE IT - DON'T TAKE OUR WORD FOR IT

The Product, Unretouched.

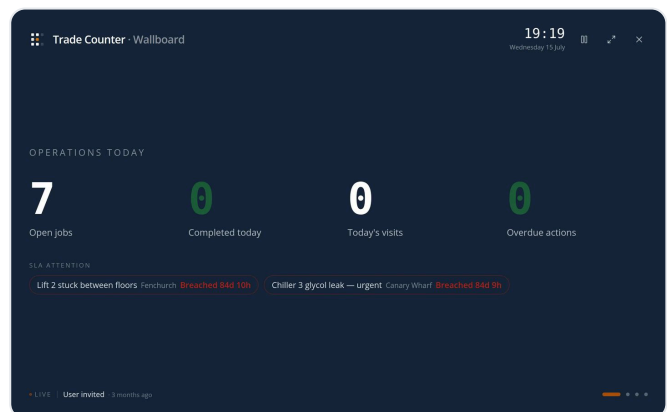
Screens straight from the app - the same pixels your team will work in. Every capture shows illustrative demo data.



Operations Command. The Operations Health score, the KPI row and the AI workspace band - the whole estate on one screen.



Compliance. The critical finding finds you - findings register, certifications, audits and the AI Compliance Advisor, all governed by the review rule.



Wallboard. Thirteen rotating panels for the office TV - oversized numerals, SLA breach chips, a live ticker, no user session on the screen.

Built For Both Sides Of The Job.

Owner and contractor see the same job, the same documents and the same history. Nothing lost between inboxes - and every handover carries its evidence with it.

FOR BUILDING OWNERS

See Every Building. Prove Every Certificate.

- **Compliance on real UK frameworks** - findings tagged to RRF50 2005, LOLER 1998, BS 7671 and more; EICR, CP12 and FRA certificates read straight into remedial jobs.
- **SFG20-aligned PPM planner** - the annual grid plus a week view, with drag-to-reschedule.
- **RAG (red/amber/green) dashboards & portfolio map** - compliance posture and open-job pressure per site, at a glance.
- **Approvals engine** - spend thresholds and per-user limits before money moves.
- **Supplier KPI scorecards** - on-time rates, first-time fix and contract renewals in one view.
- **ESG & Net-Zero tracking** - footprint reporting with AI advisors weighted to your priorities.
- **3D walkthroughs** - embedded virtual site tours next to the asset register.

FOR CONTRACTORS & SUPPLIERS

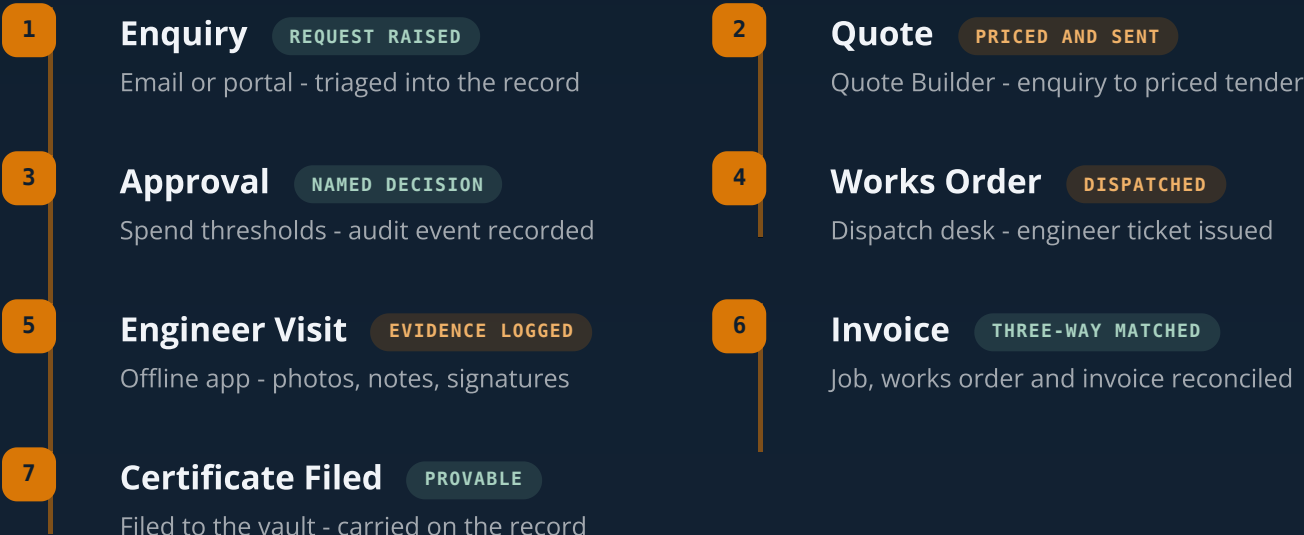
Win The Work. Deliver It. Get Paid.

- **Quotations & bid review** - from enquiry to priced tender, with AI-assisted bid comparison.
- **RAMS in minutes** - risk assessments and method statements drafted for a competent person to review.
- **Dispatch desk** - works orders, dual signatures, engineer tickets and SLA packs.
- **Offline engineer app** - installable on any phone; raise jobs and log entries on site, sync later.
- **Invoice three-way match** - job, works order and invoice reconciled before approval.
- **Margin control** - portfolio margin board-packs and commercial change control.
- **Client updates, your brand** - polished periodic reports generated under your own identity.

One Record Of The Job - End To End.

From enquiry to certificate, both sides work the same record - same documents, same approvals, same audit trail.

■ OWNER SIDE ■ CONTRACTOR SIDE



ENQUIRY → QUOTE → APPROVAL → WORKS ORDER → ENGINEER VISIT → INVOICE → CERTIFICATE • SAME DOCUMENTS • SAME APPROVALS • SAME AUDIT TRAIL

AI Drafts It. A Competent Person Signs It Off.

The Trade Counter's AI is an expert co-pilot for scopes, tenders, RAMS, safety documents and asset lifecycle calls. Every answer is **grounded in your live data** - jobs, assets, certificates, invoices - and cites the records it used. It never guesses across tenants, and it never acts alone.

DRAFT



REVIEW



SIGN-OFF

Most CAFM AI drafts and disappears. The Trade Counter's moves through a governed pipeline with a named approver - a draft until a competent person signs it off, and the record shows who.

"This output has been generated by AI as a drafting and analysis aid. It requires review and approval by a competent person before it is relied upon or issued. Final responsibility remains with the authorising individual."

- The rail, verbatim - printed on every AI surface

■ Scope Builder

Turn a plain-English brief into a structured scope of works ready to send to suppliers.

■ Bid Review

Compare returned tenders side by side - coverage, price and risk - before you appoint.

■ RAMS Pack Composer

Risk assessments and method statements drafted from the job record, for review and sign-off.

■ Compliance Gap Analysis

Scan certificates and findings against your frameworks to surface what's missing or expiring.

■ Invoice Three-Way Match

Reconcile invoice, works order and job before approval - exceptions flagged, not buried.

■ Permit To Work

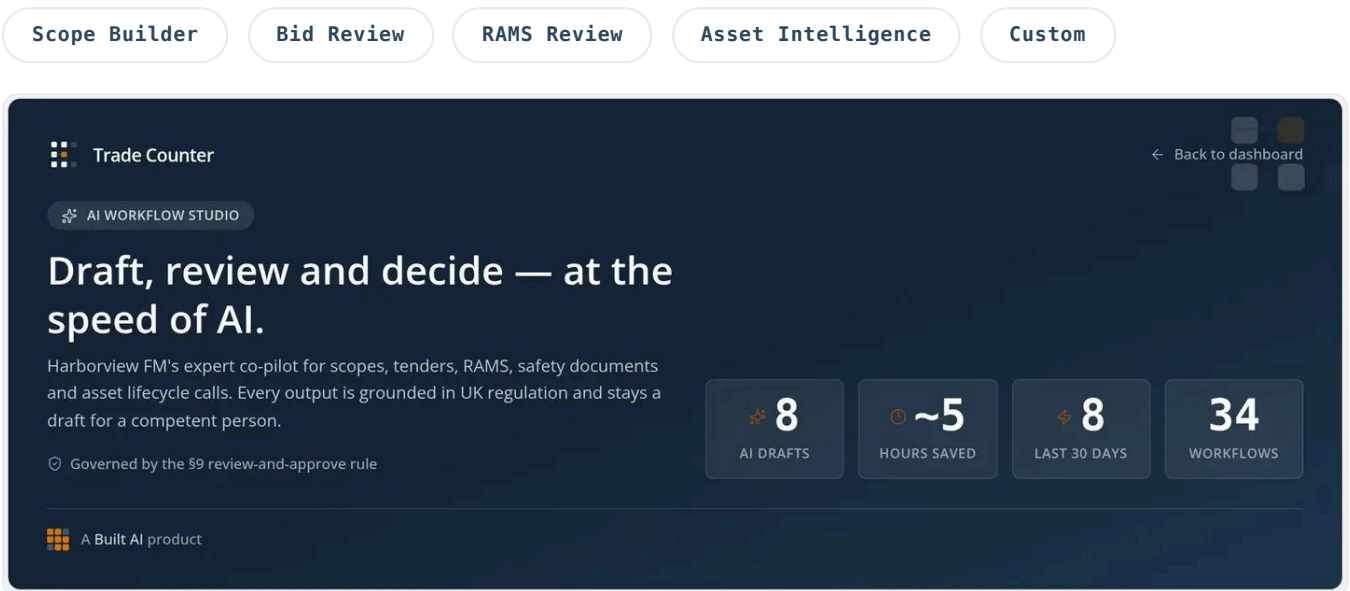
Draft permits with the right controls for the task, tied to the asset and site record.

34 governed workflows across eight categories - plus guided journeys and grounded AI advisors on every screen.

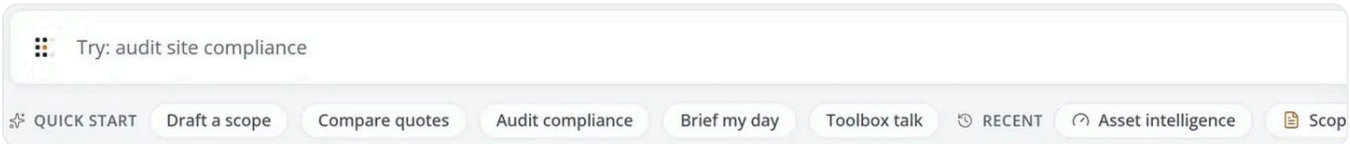
Built on Anthropic's Claude - a frontier model, not a generic wrapper.

One Studio. The Whole Operation's Paperwork.

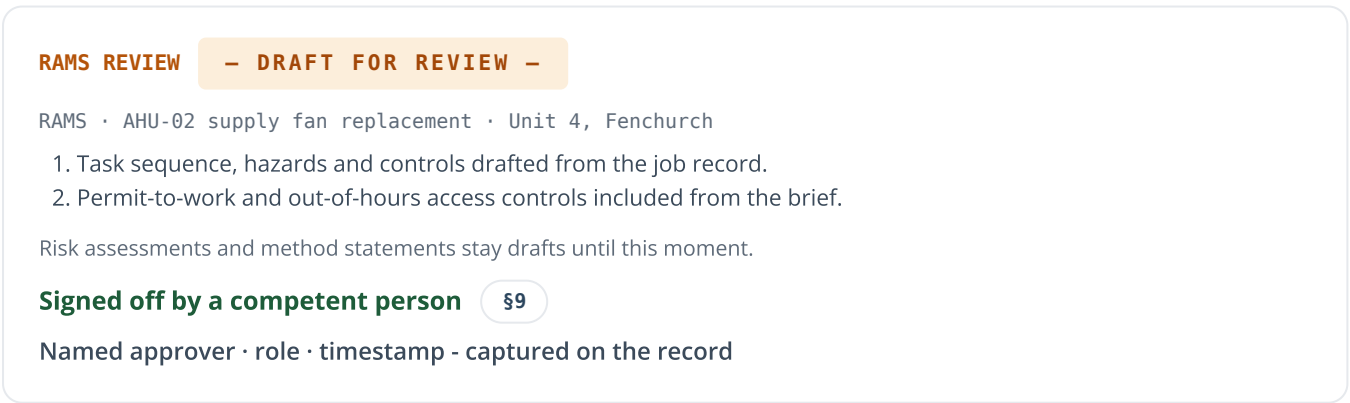
The Workflow Studio is where the 34 governed workflows live - organised across eight categories spanning operations, compliance, assets, PPM, procurement, quotations, reporting and ESG. Pick a lane, follow a guided journey, or start straight from the record you are already on - every draft lands in the same review queue.



The Studio front door. Draft, review and decide - the §9 shield line and the live workflow stats, in the product's own pixels.



One box for the paperwork. The prompt bar and its quick-start chips - scopes, quotes, compliance audits, daily briefings.



Every draft waits for a person - the review queue is the front door.

The Scope Builder, Act By Act.

The interactive brochure plays this walkthrough live - the same governed loop every Studio workflow runs. Reproduced here in full.

BRIEF → DRAFT → REVIEW → SIGN-OFF

ACT 1 The brief - drawn from the live record

ASSET / SYSTEM AHU-02 supply fan · Unit 4, Fenchurch	BUILDING TYPE Multi-tenant office	PROBLEM Intermittent supply-fan failure; comfort complaints
DESIRED OUTCOME Like-for-like replacement, minimal downtime	CONSTRAINTS / ACCESS Roof plant room - permit and out-of-hours access	BUDGET Provisional - confirm at tender
TIMELINE Within the next PPM window	KNOWN EXCLUSIONS BMS re-commissioning by others	SUPPORTING FILES Asset record + last service sheet, attached from the record

The asset, site and service history attach themselves - you write the intent.

ACT 2 The draft

– DRAFT FOR REVIEW –

SOW-1043 · Draft 1 · AHU-02 supply fan replacement

1. Isolate, disconnect and remove the existing supply-fan assembly (AHU-02).
2. Supply and install a like-for-like replacement unit; make good ductwork transitions.
3. Test, rebalance and hand back - certificates filed against the asset record.

"This output has been generated by AI as a drafting and analysis aid. It requires review and approval by a competent person before it is relied upon or issued. Final responsibility remains with the authorising individual."

ACT 3 The review gate

Waiting on a competent person - the draft cannot issue itself.

A) Approve

B) Change [item]

C) Question

Edit re-opens review - the approval is voided and re-sought. No silent edits.

ACT 4 Sign-off

Approved 59

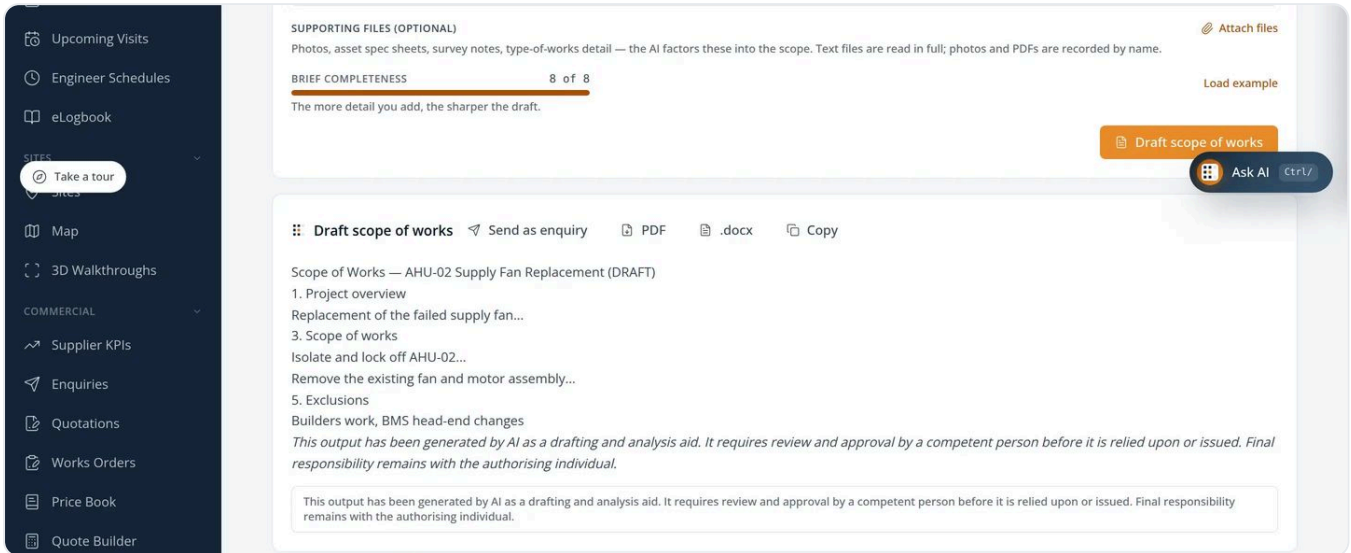
Sarah Okafor · Contract Manager · 15 Jul 2026, 14:32

Document locked · audit event recorded · editing voids the approval and re-seeks it.

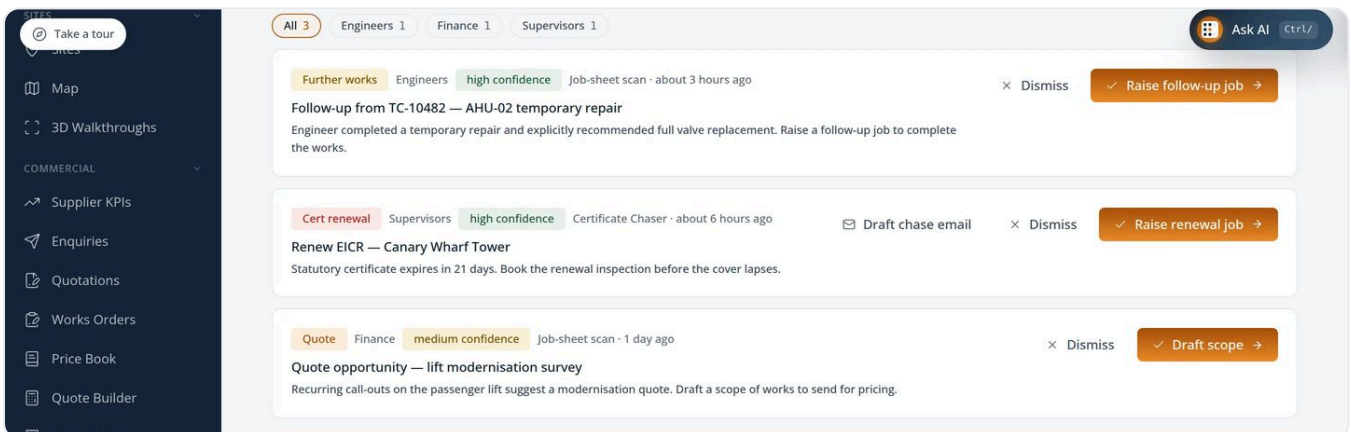
Nothing is booked, raised or sent without a human decision.

The Studio, In Its Own Pixels.

Captured from the product in demo mode - not mock-ups. A works brief becomes a formal draft, and every AI-proposed action queues for a person to accept or dismiss.



A brief becomes a draft. Eight of eight intake fields, one click - a formal Scope of Works labelled DRAFT, carrying its review-and-approval disclaimer on the surface, ready to send as an enquiry or export to PDF and Word.

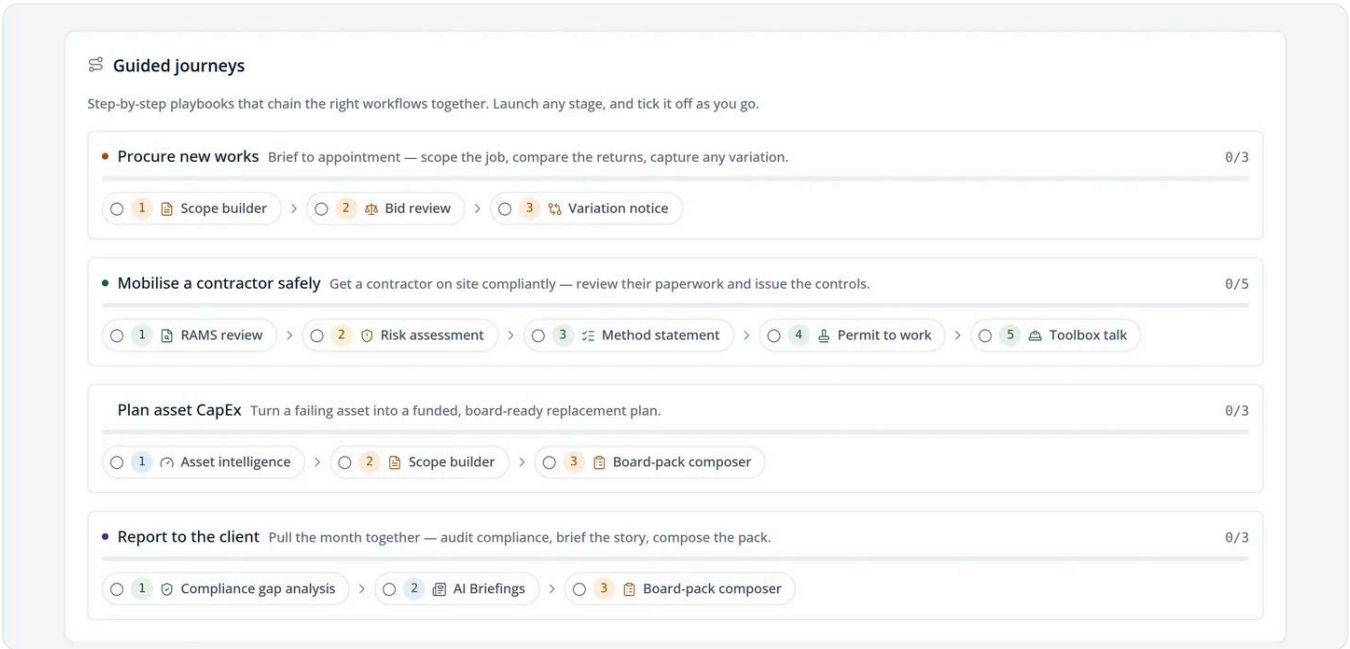


The review queue. Three AI-proposed actions waiting - follow-up works, a certificate renewal, a quote opportunity. Each is a dismiss or a one-click action; nothing is committed until a person confirms.

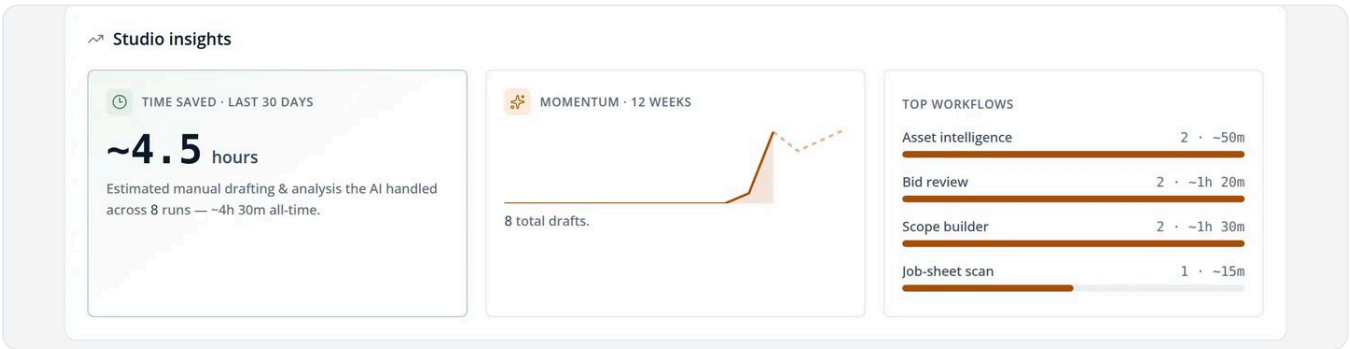
Screens show illustrative demo data.

Thirty-Four Workflows, Eight Categories.

34 governed workflows across eight categories - plus guided journeys (Procure new works · Mobilise a contractor safely · Plan asset CapEx · Report to the client) and grounded AI advisors on every screen.



Guided journeys. Step-by-step playbooks that chain the right workflows together - launch any stage, and tick it off as you go.



Studio insights. Time saved, momentum and top workflows - measured on the workspace's own runs, not a promise.

Built on Anthropic's Claude - a frontier model, not a generic wrapper. Screens show illustrative demo data.

Governed To The Signature.

The same record carries the work through to a named, dated sign-off - alongside the operational views the whole team runs on.

Quotations

Works Orders

Price Book

Quote Builder

Financials

Approvals

INTELLIGENCE

AI Assistant

Health and safety. The Contractor shall comply with CDM 2015 and all site rules. **Risk assessments and method statements (RAMS) specific to the Works must be submitted and approved before works commence** (order value exceeds the £500 RAMS threshold or RAMS were required at enquiry).
Termination. Either party may terminate for material breach not remedied within 14 days of written notice.
Execution
Signed for and on behalf of the **Employer:** Demo Operator — signed 15 July 2026
Signed for and on behalf of the **Contractor:** *awaiting signature*

Employer signature

Demo Operator
Signed 15 Jul 2026

Contractor signature

Awaiting the supplier's signature in their portal.

The **sign-off, named and dated.** A works order's execution block - signed for the employer by name and date, the contractor's countersignature awaited, RAMS gating the start of works.

Works Orders

Price Book

Quote Builder

Financials

Approvals

INTELLIGENCE

AI Assistant

AI Workflows

Auto Reports

Documents

SUSTAINABILITY

ESG Performance

Net Zero

PLATFORM

Plant Room

ASSET	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
Chiller 1 chiller · every 3m	—	—	—	—	—	—	—	—	○	—	—	—
Chiller 2 chiller · every 3m	—	—	—	—	—	—	—	—	○	—	—	—
Chiller 3 chiller · every 3m	—	—	—	—	—	—	—	—	○	—	—	—
AHU Roof-Level ahu · every 2m	—	—	—	●	—	—	—	○	—	—	—	—
Lift A (Passenger) lift · every 6m	—	—	—	✓	—	—	—	—	—	—	○	—
Fire Panel Main fire-panel · every 3m	—	—	—	—	—	—	—	—	○	—	—	—
Backup Genset genset · every 6m	—	—	—	—	—	—	—	—	—	—	○	—
AHU-1 ahu · every 2m	—	—	—	✓	—	—	—	○	—	—	—	—

The **annual grid.** Every asset's year on one screen, colour-keyed from complete to overdue.

Quotations

Works Orders

Price Book

Quote Builder

Financials

Approvals

INTELLIGENCE

AI Assistant

AI Workflows

Auto Reports

Documents

SUSTAINABILITY

ESG Performance

Take a tour

Net Zero

Fire panel annual certification
Kings Cross
Scheduled 29 Apr 2026
Subcontractor

J0B-5512 PPM
Boiler service overdue
Bishopsgate
Scheduled 30 Apr 2026
Subcontractor

AHU-Roof filter replacement
Canary Wharf
Scheduled 2 May 2026
Rui Li

Chiller 3 glycol leak — urgent
Canary Wharf
Scheduled 5 May 2026
Subcontractor Breached 85d 3h

J0B-5519 PPM
Fire panel quarterly test
Paternoster
Scheduled 4 May 2026
Subcontractor

J0B-5516
Lift 2 stuck between floors
Fenchurch
Scheduled 8 May 2026
Subcontractor Breached 85d 5h

Lift 1 annual LOLER inspection
Fenchurch
Scheduled 6 May 2026
Subcontractor

The **kanban.** Triage to awaiting parts - SLA breach chips riding the cards.

Screens show illustrative demo data.

■ The Trade Counter · built-ai.io

EDITION 2026.07

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Whole Deliverables, Not Just Chat.

Packs are governed document generators built into The Trade Counter - branded, client-ready deliverables produced from your live records, each moving through the same draft → review → sign-off register. Four generate from the Packs page, three from the job drawer, and the bidroom starts from an enquiry.

PACK 01

CONTRACTORS

Bidroom In A Box

A five-stage bid workflow that turns a tender into a submission-ready response. *From an enquiry.*

PACK 02

CONTRACTORS

Pre-Con Pack

Mobilisation documents for a newly won contract - day one, covered. *From the Packs page.*

PACK 03

BOTH

RAMS Factory

Risk assessments and method statements from the job record. *"Generate RAMS" in the job drawer.*

PACK 04

CONTRACTORS

Commercial Control Kit

Change control that keeps scope creep on paper. *"Generate Control Kit" on the Packs page.*

PACK 05

CONTRACTORS

Margin Cockpit

A portfolio margin board-pack - where money is made and lost. *From the Packs page.*

PACK 06

BOTH

Dispatch Desk

Works orders and engineer tickets for the day-to-day. *"Generate Works Order" in the job drawer.*

PACK 07

BOTH

Handover Certificate

Practical-completion certification anchored to the job's evidence trail. *"Generate Handover Cert" in the job drawer.*

PACK 08

OWNERS

Client Update

A periodic client-facing portfolio update - compliance, work done, what's next. *From the Packs page.*



Governed by design. Every pack carries a reference in the Built AI Packs register; the authoritative review and sign-off is the digital approval recorded against it - so what leaves the building has a named approver behind it.

Four Switchable Views - Plus A Supplier Portal.

Every role sees the workspace shaped to their day - same record underneath, different front door. The in-app "View as role" switcher previews each one; suppliers get their own portal.

FM MANAGER	Run The Portfolio. The FM Manager's day, front-loaded with what needs a decision - the role-aware dashboard, the PPM planner and renewals, and the approvals queue awaiting your limit.
ENGINEER	Do The Work, Prove The Work. The Engineer's day fits in a pocket - installable on any phone.
CUSTOMER	See Your Buildings, Not A Spreadsheet. The Customer view is curated: a slimmer nav - your sites, your requests, your evidence.
WORKSPACE ADMIN	Own The Workspace. The Workspace Admin sees the levers: people, roles, settings, audit.
SUPPLIER PORTAL	Win It, Deliver It, Invoice It. Suppliers get a dedicated portal shell of their own - no workspace clutter, no phone tag.

■ **GETTING STARTED**

Up And Running In Three Moves.

Connect Your Data

1

Bring sites, assets and documents in through Data Sources - and keep the feeds (email, energy, accounting) flowing in.

Invite Your Team

2

Role-aware invites - FM managers, engineers, clients and suppliers each land in the view built for them.

Run The Day

3

The dashboard, planner and AI Action Inbox take it from there - with every decision governed and audited.

Serious About Whose Data It Is.

Multi-Tenant Isolation

Row-level security on every record - each organisation's data is isolated at the database layer, and tested to stay that way.

Enterprise Sign-In

Single sign-on with Microsoft Entra and Google, alongside password and magic-link access.

Governed Approvals

Per-user approval limits, spend thresholds and a full audit trail on quotes, jobs and invoices.

Your Brand

White-label ready - your logo, your colours, your domain. Per-tenant branding out of the box.

■ INSIDE THE WORKSPACE

Compliance, PPM And Approvals - Done Properly.

Operations Health Score

One number for the whole operation - benchmarked against the sector median, with a breakdown a click away.

Annual-Grid PPM Planner

SFG20-aligned schedules on a twelve-month grid - complete, scheduled, overdue at a glance - with a week view for the sharp end.

Approvals With An Audit Trail

Spend thresholds, per-user limits and a named decision on every quote, job and invoice.

Offline Engineer App

Queue jobs and log entries on site with no signal - they sync themselves the moment you're back.

Switching is a considered decision - here's how the move actually goes.

Bring Your Data In

Sites, assets and documents import through Data Sources - we help you map and load them, so day one isn't a blank workspace.

Real People Behind It

Talk to the team who build it - hello@built-ai.io, UK. No ticket-triage maze between you and an answer.

Yours To Take With You

Export jobs, invoices, quotes, assets and findings to CSV or PDF on demand. GDPR-aligned handling; data-processing terms and hosting details on request.

The Questions A Buyer Actually Asks.

How does our existing data get in?

Sites, assets and documents import through Data Sources - the Built AI team helps map and load them, so day one is not a blank workspace. The feeds keep flowing afterwards: email intake, energy readings and accounting stay connected.

Will engineers on site actually use it?

The engineer app installs on any phone. My Day carries the route, the jobs and the access notes; jobs and log entries can be raised offline and sync when back on signal. Completion evidence - photos, notes, signatures - lands against the job record.

Who is accountable for what the AI produces?

Every AI output moves through draft, review and sign-off with a named approver, and each AI surface carries the rail verbatim: it is a drafting aid until a competent person approves it. Nothing is booked, raised or sent without a human decision.

Is our data locked in?

No. Jobs, invoices, quotes, assets and findings export to CSV or PDF on demand. Handling is GDPR-aligned, and data-processing terms and hosting details are available on request.

How do people sign in - and how is our data kept separate?

Single sign-on with Microsoft Entra and Google, alongside password and magic-link access. Each organisation's records are isolated with row-level security at the database layer - and tested to stay that way.

How long does it take to get running?

Three moves: connect your data, invite your team, run the day - about three weeks in practice. Prefer to look first? The walkthrough runs on the live product - book 20 minutes.



Smarter Facilities, Together.

See The Trade Counter on your own portfolio - compliance, maintenance, jobs and money in one workspace, with AI that stays accountable.

[Book A 20-Minute Walkthrough](#)

hello@built-ai.io · built-ai.io

Twenty minutes with the team beats an hour with a deck - book a walkthrough, or ask for a pilot workspace on your own sites.

 **The Trade Counter**[™]

A BUILT AI PRODUCT

 **BuiltAI**

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Interface previews are illustrative; product screenshots show the app with illustrative demo data. Edition 2026.07 · supersedes earlier editions.