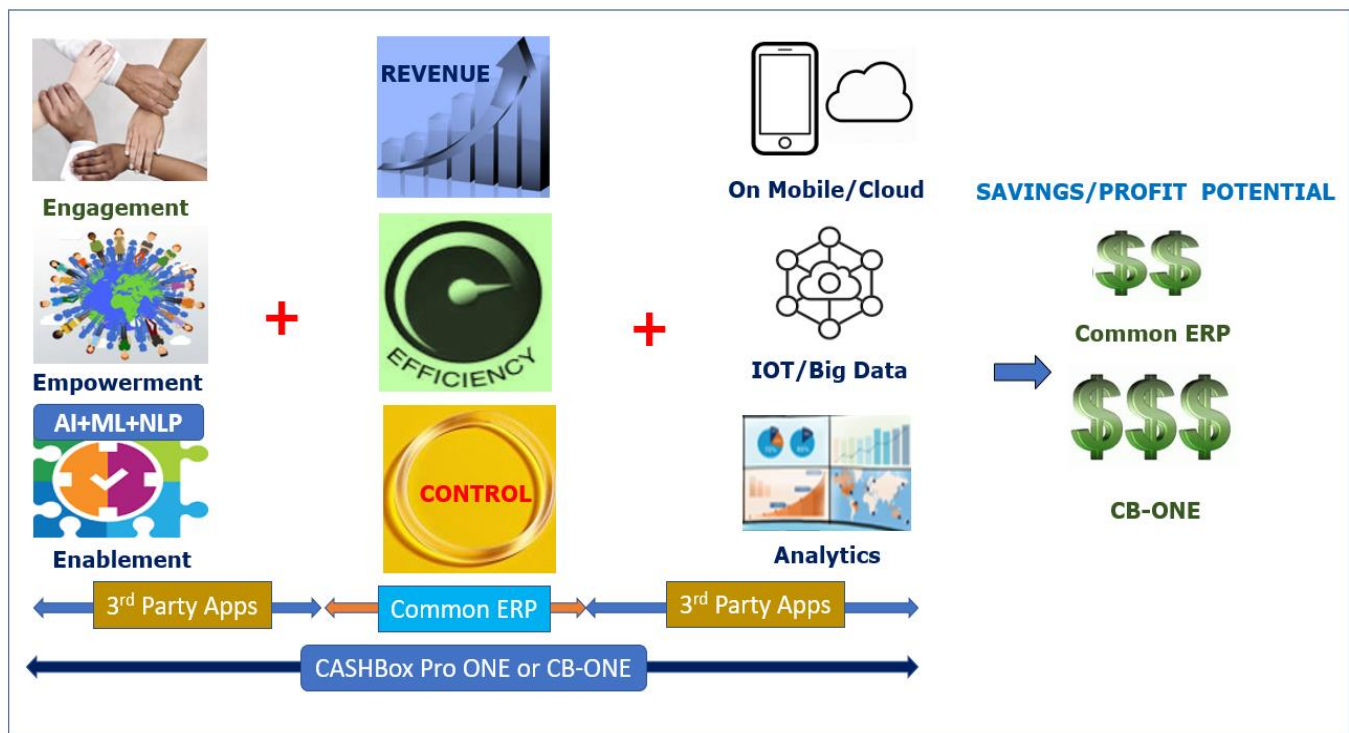


Companies use ERPs, HCMs, CRMs etc to transform their business and improve Revenue, Efficiency and Controls. However, their path to transformation is often riddled with

- Many disjointed processes & systems
- Disengaged users
- Expensive licenses
- Repeated data entries
- Prolonged manual consolidation work
- Limited automation & transparency
- Poor quality data management
- Inconsistent controls
- Delayed and leaky operation
- Sub-optimal decisions

This leads to escalation of effort, risk and cost, instead of achieving the desired productivity gain. CB-ONE platform overcomes these challenges and boosts productivity.

Our Offering – Digital Transformation Platform CASHBox Pro ONE or CB-ONE



CB-ONE is a Secure Analytics-rich Fast Enterprise-class (SAFE), AI-enabled, integrated, multi-lingual, multi-device, multi-currency, mobile-ready **SaaS ERP platform** to manage workforce, work and workplace of medium and large businesses.

It is built on CASHBox Pro™ Framework that uses AI, Machine Learning, NLP, IOT /Big Data, Lean, Design Thinking, Human Sigma, Predictive and Diagnostic Analytics, Positive Psychology & global best practices, and the same proven open-source technologies used by giants such as UN, BMW, Nokia, Bloomberg, Goldman Sachs etc.

While providing common ERP functionality to improve Revenue, Efficiency & Controls, CB-ONE differentiates itself with User Engagement, Empowerment and Enablement capabilities, and thereby maximizes the **Productivity & Profitability** of the firm. It can extend as well as replace the existing ERP. Contact us to know how it can benefit you.

Some Salient Features of CB-ONE platform:

Secure Mobile Access	Available using google chrome browser, or through android mobile app with multi-layer security.
Flexible Deployment	On cloud as well as on-premise in standalone mode.
Highly Parameterized	200+ Master data tables and business rules expedite its implementation.
Functionally Superior	Functionally broad and deep with industry best-practices & workflows to maximize utility. Clients can add own custom modules to maximize ROI.
AI/ML Enabled ERP	Equipped with OCR, NLP, AI & ML capabilities like document verifier, parser, sentiment analyser, predictors to maximize productivity.
Modular, Open & Growth-ready	Modular scalable architecture for diverse processes/vital data items, with REST API integration. Uses Open-source technology to minimize TCO.
Innovation-Boosting	Promotes goal-driven innovation through ideas, blogs, flexible work schedule, design thinking techniques etc.
Collaborative	Enriched with collaboration features such as chat, comments, visibility wall.
Wellness Promotion	Equipped with features such as health calculators, medicine charts, exercise charts, SOS, health FAQs etc
On-The-Job Learning	Able to intelligently recommend, schedule and track training, and deliver interactive lessons, quizzes, games, video etc
Powered By Smart Tools	Smart tools like audio/video recorders/ players for tasks, alerter, stock/Q tracker, built-in mails, calendar, SMS, Machine(IOT) Health Tracker etc.
Predictive Analytics	Loaded with diagnostic and predictive features using Linear and Logistic Regression (Forecasting/Classification), KNN, SVM etc.
Talent Engagement	Surveys, Comments, Sentiment Analysis, Human Sigma and Smart chatbot with issue logging, support, FAQ, voice-driven navigation, weather etc
Integrated Platform	One platform with multiple applications to avoid repetitive data entries and data silos and to allow automated consolidation.

CB-ONE				
Key Modules of CBHCM +	Key Modules of CB-iService +	Key Modules of CBCRM		
Use Cases: Silver (Leave, Payroll, Attendance); Gold (Silver + Performance Appraisal, Training, Expenses, Recruitment); Platinum (Gold + Idea, Blogs, Safety, Shifts, Services, Timesheet, Wellness, SOS etc)	Use Cases: Silver (Supply Chain - Orders, Budget, RFP, Purchase, Inventory, Billing, Tasks.); Gold (Silver + Fleet, Transport, Expenses, QA); Platinum (Gold + Business Case, Support, Maintenance & Safety, Projects, Wellness, SOS, Analytics etc)	Use Cases: Silver (Leads, Proposals, Orders, Billing, Documents, Segments); Gold (Silver + Training, Expenses, Call Tracking, Meetings, Price Schemes); Platinum (Gold + Market Research, Campaigns, Agents, Channels, Export, Customer Support, SOS, Analytics etc)		
One Integrated Platform to meet many processing needs of BFSI, Core Sector, BPOs, Trading, IT etc				
Quick Implementation	Enabled By AI+ML+NLP etc	Engagement Features	You Add Your Own Modules	Minimize TCO Maximize ROI
Productivity Improved is Profitability Achieved				

CB-ONE – Maximize Productivity, Maximize Profitability!



Secure yet Easy-to-access Talent Information



CB-ONE talent repository system allows users to capture, store, filter, search and retrieve talent information based on role-based-access. It includes an extensive array of attributes covering all information related to the professional life of the talent, important personal information for emergencies and benefit management and personal and family photographs. It includes information for talent belonging to different educational and professional background, social traits, employment statuses, nationalities etc.

Users can easily view their information, update critical contact information, upload relevant documents, browse the reporting relationships and maintain their family information through self-service mode. This information will be available only to authorized talent pool without any intermediation to accelerate the speed of access and corresponding work.

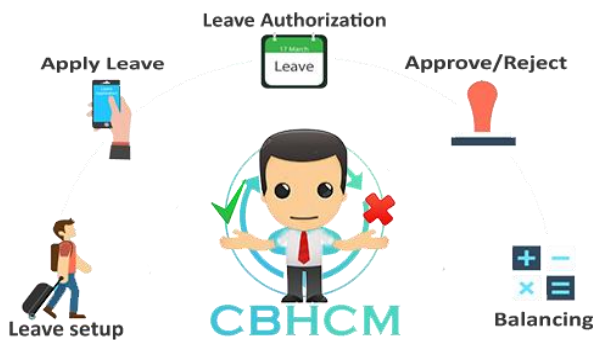
This can be accessed through any device any time depending on the IT policy of the client organization.

Policy Rollout / Enforcement



A progressive organization is a policy-guided one. CB-ONE facilitates managers to maintain the list of applicable policy and manual for each department, its sharing, digital acknowledgement by user and online testing of user awareness through quick quizzes, as desired by the firm.

Automation of Leave and Attendance



Are you still using multiple versions of Excel maintained by multiple users to manage your employee leave records?

CB-ONE leave management system allows users to prevent time-off abuses, enables different leave rules for different groups, and implement company-wide leave policy for various leave types including maternity leave, paternity leave, half-pay leave and leave without pay.

One can add one's own leave types, define carry forward and accrual rules, pay percentages, weekend exclusions, maximum consecutive period, minimum serving period for entitlement, make exceptions to individual employees and groups using leave rules. Module is well integrated with overtime, payroll and attendance.

Attendance module serves the photo-attendance with AI-powered face recognition. It supports rule-based approval workflow for regularization of attendance for travelling team members.

Track Time and Effort to Achieve Superior Results



Challenge for the leadership is to make ordinary people do extra-ordinary things, albeit with the right tools and with the right level of engagement. CB-ONE is that tool which not only engages your team members, but make things easy for them to achieve much more than anticipated with minimal effort. Easy to enter timesheet, easy to record task instructions as per best-practices and easy to listen to the original instruction and update progress of tasks often with slider, make the time tracking and task tracking secure yet convenient.

Multiple timesheets to suit multiple purpose, project specific time tracking, time-tracking on routine tasks, overtime time entries - all these provide the basis for workforce optimization and are the critical inputs for AS-IS stage of time and motion study. CB-ONE is designed by Certified Six Sigma Black Belt (ASQ,USA) with strong expertise in productivity maximization, and fellow from Institute of Leadership and Management (UK) so as to offer a superior effort tracking tool. Leverage its many advanced features including one that reminds team members and supervisors in the morning automatically who have failed to submit the timesheet previous night. Best part is that it can be customized by the user based on the needs of the situation for whom the timesheet monitoring alert is to be generated. This is indeed POWER TO USERS.

Quick and Comprehensive Payroll Processing



CB-ONE provides a rare blend of flexibility and convenience to payroll managers when it comes to pay employees in accordance with their remuneration structure covering various flexible and fixed components and comply with statutory regulations.

The system allows to run it multiple times catering to the needs of temporary work force paid on weekly basis, includes attendance, overtime and leave automatically and prepares the file for bank transfer according to most popular formats.

It supports definition of multiple payroll components, links them to chart of account to accommodate appropriate expense codes and other provisions, captures the approved overtime effort on-the-fly, calculates the unauthorized leave part, carries out deductions as per the law of the land and contributes to provident fund/ pension fund as per regulations.

It also allows users to declare their investments and previous and additional income figures, so that tax deduction process can be followed judiciously and correctly. Standard payroll reports and pay slip formats facilitate user-support on self-service mode to the maximum extent possible thereby minimizing the burden on already-stretched payroll management team.

Expense Management



Expenses module on CB-ONE is one of the most sophisticated modules in terms of functionality.

It allows users to do budgeting using chart of account and common expense categories, definition of real-life grade-based transaction limits, approval limits (delegation of authority matrix), prior allocation of agreed budget, approval workflow for budget, travel requests and expense claims.

Expense claim management is a lot easier with our expense module with quick bulk entry facility to save time, handling of multi-currency transaction and automatic currency conversion, automatic exception generation through our Filter-Transform-Load (FTL) engine, increased visibility through various reports and continuous tracking of expenditure against budget and multi-level approval process.

The module can generate the handoff file for bank transfer in common formats and can also post subsidiary entries through handoff to General Ledger.

Applicant Tracking, Recruitment and Onboarding



Human capital is the greatest asset for any forward-looking organization. It is people who make it or break it.

HR throughout the world is busy searching for the best-fit talent for the organization within the given framework and needs a sourcing and selection process that is not only sophisticated but superfast to meet the stringent onboarding SLA.

CB-ONE makes it easy to publish a vacancy board, post it to social media sites with one click operation, share the employer branding across channels, source resume externally using plugin forms, parse and clean CV information from pdf, docx and rtf formats using natural language processing.

It also lets one manage the interview process smoothly with continuous update of status as deemed fit.

Once joined, the candidate is onboarded with activities that are tracked through comprehensive confirmation and induction checklist. The whole process is system-driven but managed by users with minimal data entry and with maximal use of pre-configured steps that can change based on the situation.

Team Training

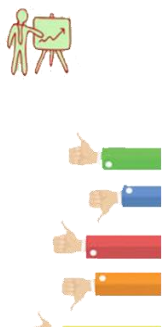


CB-ONE, in line with the best practices, and mandatory requirements of ISO standards, enables continuous improvement through on-demand as well as periodic learning.

It not only makes it easy for users to manage trainers, training courses and training sessions, but also handles training delivery (in various formats including delivery of interactive training material) and quick assessments. One can define numerous internal and external training sessions which the team member can enrol based on the skill requirements.

In addition, the supervisor can assign training as part of incident management (to prevent incidents), succession planning for an important role or performance management. One can track the assignment, progress and the completion of the training easily. Our analytics module delivers various charts and reports based on all commonly used statistical measures such as mean, median, mode, standard deviation etc.

Performance Appraisal and 360° Feedback



CB-ONE is a platform for performance optimization so it is natural that it will adopt a rigorous yet user-friendly performance measurement process.

It starts with objective setting at the departmental level using Balanced Score Card approach. Once the KRA and SMART objectives are set, these are translated into individual objectives through the reporting structure. It allows on-demand quick appraisal of tasks executed by the team members at the local level, as well as scheduled appraisal set by the management.

Allows task review, project review, user feedback, self-appraisal, supervisory appraisal and 360 degree feedback as part of performance management process. Activities are always tied to departmental objectives so as to maintain their relevance and weightage. Laudable performance can be further appreciated through public display of the appreciation note on visibility wall. All these make sure that not only performance management is smooth, but it is holistic, timely and engaging for the right level of collaboration.

Succession Planning



We always say that the show must go on. It is possible only when there is proactive planning, identification of potential successors, Markov analysis and systematic grooming of the potential successor. All that is possible through CB-ONE, along with many other innovative features.

Background Checking



Screening of the right talent does not finish with his or her joining the firm. Background verification is a crucial activity that is increasingly popular. We understand your needs and that is why the CB-ONE has a module dedicated to enrolment of verifiers, initiation of verification, timely updates and upload of the required document.

HR Compliance Calendar



CB-ONE is an advanced HR automation platform that not only allows you to capture compliance events in the calendar format, but also creates tasks, notification for timely adherence to the statutory compliance. Use it to mitigate your compliance risks and transform the risk management culture.

Helpdesk Management



HR is a specialized line and users need HR support. Our survey has confirmed this for all respondents who also have opted for an in-built Case Management tool for extra convenience. CB-ONE provides a state-of-the-art ticketing system with categorization, prioritization, SLA, auto-alerts, knowledge-base and analytics.

Ideas, Blogs, Polls & Surveys



Empowered users need a channel to express themselves and engage others. But this energy has to be directed to the right objectives. That is why CB-ONE makes it easy for users to post ideas, comments, blogs on topics and objectives that matter to the firm. Polls and surveys engage teams and provide quick inputs.

Policy Compliance



A progressive organization is a policy-guided one. CB-ONE facilitates the work of the management to maintain the list of applicable policy and manual for each department, its sharing, digital acknowledgement by user and online testing of user awareness, as desired.

Manage Suppliers across multiple dimensions using data



Suppliers are important elements of strategic supply chain. Supplier risk management is supplier information management. That is why CB-ONE facilitates collection of supplier profile information across multiple dimensions including geography, revenue size, performance rating, industry so as to manage supplier relationship effectively.

Similarly prices captured from different suppliers over different time-period helps managers to select the best option while deciding on a purchase order, thereby optimizing cost. System provides time-series analysis of price of critical items using Auto-regressive Integrated Moving Average with Machine Learning. This provides crucial insight on the price movement of critical items used in bulk and minimizes the supply chain risk.

Quality Control



Products purchased must be quality-assured to compete in the market. CB-ONE provides the facility to set quality criteria with weights and evaluate the purchased product against that. Item-specific threshold can be decided to generate exceptions or reject the item.

Maintenance & Support



Equipment and assets need checklist to ensure their operational readiness. CB-ONE provides checklists to define the maintenance tasks at appropriate frequency. System automatically populates these checklists at the set frequency, alerts users and send reminders if not done.

Shifts



Shift management is an important aspect of operations in many organizations. With CB-ONE, users can define the shift timing, add team members to the shift, add their roles and track their attendance accordingly. Publishes roster automatically based on the data fed.

Manage Fleet systematically



From user indent to disposal - the entire life cycle of fleet, its service history, demurrages/damages/delays, fuelling, trips, drivers, all are tracked by the system. Transport orders, bills and collection are captured. Location service updates the route on the map.

One can track fleet earning and expenses over a period of time to ascertain the utilization of the asset.

Checklist based proactive service notifies the manager about impending service schedules or service delays so as to maintain the asset health efficiently.

Accidents, insurance and claims are managed on the system to obviate the need for multiple registers or phone calls during crisis period.

Plan your purchase with budget, authority limits, indent/requisitions, RFPs.



Purchase is an essential activity for any business. But this need not be unplanned or ad-hoc. Procurement planning starts with user indents and budgets. CB-ONE allows users to do the budgeting for relevant expense category with necessary justification and approval workflow. Once approved, this budget is available for ordering so as to avoid any unplanned expenses.

Users can issue indents which can go through approval workflow based on the organizational need. Material or Purchase department can consolidate the requirement of all approved user indents for relevant categories and issue a purchase requisition.

For large, high-value and complex procurement, RFP can be issued which links to the indent or requisitions for ensuring that user needs are met appropriately. Further, we can define limits for the purchase as well as payment. System will validate during ordering and payment stage the limits thereby ensuring the delegation of financial limits or authority as per the company policy.

Procure, Receive and Pay for multiple items with workflows at once



Many suppliers deal with multiple product categories. We need not issue multiple purchase orders for that. In one PO, users can include all relevant categories, the SKU name, Quantity, Unit Of Measurement, Price and discounts. It saves user data entry time and supervisor's review time, if approval workflow is configured. At the same time, for SKU level visibility, this hierarchical data is auto-converted to tabular display.

Once this order is configured, all material receipts are tracked against the order. There may be part-shipment and system accepts it. The ordering currency for individual SKU may be different especially if that particular SKU is imported. No problem, CB-ONE will convert it in to the base currency using the prevailing evaluation rate fed from reputed international agencies. If the rate conversion needs currency-specific custom charges (say 1-2%) for bank processing etc, that can be included. Hence you receive and pay what you ordered. Payment cannot be made without order. Order (Commitment) can be made ad-hoc without approved requisitions to handle emergency but payment has to be based on order and financial limits (if set).

Evaluate and rank Suppliers with multiple weighted criteria



How do we decide the best vendor for a specific item? Well it depends on the criteria we set for evaluation. This is why CB-ONE allows users to set multiple weighted criteria using both supplier-level or organizational attributes such as reputation, past rating, financial stability, track record and item-level attribute such as material standards, performance values, operational features, component features, environmental characteristics etc.

Once evaluation criteria are set for optimal sourcing and supplier proposals are entered, for every supplier proposal, the evaluation template is ready. Users can quickly assign scores along with justification based on the individual judgement or collective judgement using approval workflow. System will rank the proposals based on the scores. With smart tools like this and timely data entries, a month-long evaluation phase can be reduced to an hour even after keeping an hour for structured evaluation of scores and justification given. This saves time, cost while minimizing risks for the organization.

Manage inventory professionally



Do you follow push manufacturing/trading or pull manufacturing/trading? It does not matter as long as you let CB-ONE know about it. Accordingly it plans for JIT inventory or safety stock. It also captures maximum stock based on the usage and demand. If ordered quantity is more than maximum stock, it creates an exception.

However, this exception can be reasonable, if this is done to honour the minimum order quantity of the supplier, provided the supervisor approves it. System also sends alerts in case the stock level goes down below the threshold level. This threshold level can be manually or automatically set for each workplace (workplace can be a plant or a storage unit etc) for each SKU based on user configuration.

When set to auto, the system defines the safety stock and maximum stock based on standard inventory formulae for the chosen type of inventory holding. During the creation of Sales Orders, system will check the availability of the stock at the given workplace. If there is a contract with a rate agreement for duration of certain time period, system automatically creates the replenishment order. However order will be auto-mailed to the supplier only after it is approved by the user with appropriate authority (if set). Inventory price can be visible over time with visibility of stock level at every work place.

Asset Management



With CB-ONE, users can identify the asset with barcode, allocate/transfer/return the asset based on organizational needs, maintain its service records, dispose it, depreciate it and track its AMC (if present). Based on user settings, notifies the asset manager when AMC is expiring.

Safety First



Safe and smooth productive operation and maintenance cannot happen without safety. CB-ONE provides a tool to capture safety incidents, conduct causal analysis so that corrective and preventive action can be taken promptly and track and report injuries & near-misses with trend analysis.

Market Research



Market research or Voice of the Customer indicates customer preferences, strength and weaknesses of the existing portfolio, key likeable features of products from competition. When this knowledge is incorporated in the value proposition, it becomes compelling. CB-ONE facilitates market research and consolidates the results for analysis and quick productive action.

Customer Support



CB-ONE provides a state-of-the-art ticketing system with categorization, prioritization, SLA, auto-alerts, knowledge-base and analytics. It allows

Automatic assignment based on predefined role, leave status and workload rules to minimize human effort,

Automatic balancing of workload using item category, constrained optimization, talent availability and role-suitability,

Automatic generation of ticket-number based on source system, date and sequence number for easy reference.

Additionally, it provides

Extensive defaulting to minimize user effort and time and maximize user convenience,

Automatic calculation of due date based on the agreed SLA plan,

Automatic notification to user and agent on ticket registration through mail and application alerts,

Automatic priority elevation based on predefined settings.

Ideas, Blogs, Polls & Surveys



Empowered users need a channel to express themselves and engage others. But this energy has to be directed to the right objectives. That is why CB-ONE makes it easy for users to post ideas, comments, blogs on topics and objectives that matter to the firm. Polls and surveys engage teams and provide quick inputs.

Deal/Opportunity Pipeline



CB-ONE populates the deal pipeline automatically showing different stages of the opportunities across product categories. This provides a quick overview of what is happening and what may happen in future so as to channelize the effort into the right direction for optimal results. Numerous intuitive charts provide guidance and insight to users so that they can manage the sales execution in a data-driven manner.

Budget & Plans



System allows Sales Managers to develop and finalize sales budget keeping different product categories, their offtake quantities and offtake values. System automatically consolidates. Using the budget codes, they can define weekly, monthly and quarterly sales plan. System tracks the revenue achieved vs revenue planned for different Sales Managers over different time-buckets with trend analysis. Budget & plans can be configured with workflows.

Track Collections



Users do not need another system to manage collections. CB-ONE allows users to define collection status and action items based on ageing, send chasers to debtors, modify credit limits, analyse customer-wise collection details for every Sales Manager and changes segment of the defaulting customer automatically so as to warn users before any future engagement. Templates of dunning letter and chasers can be configured by users.

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