CLIENT PRESENTATION

Comprehensive Organisation Management System

One Platform. Every Process. Smarter Business Operations.



Dextrous InfoSolutions Pvt. Ltd. • Noida, India

WHY IT MATTERS

The business challenge

Growing businesses run on scattered tools.

Spreadsheets, inboxes, chat groups and standalone apps each hold part of the story — and no one sees the whole picture.

COPS 360 brings it together.

Disconnected tools

Information is hard to find and handoffs between teams get missed.

Manual administration

Repetitive data entry creates extra work and avoidable errors.

Limited visibility

Leaders lack a clear view of pending actions, costs and performance.

Inconsistent processes

Without one system, standards and accountability are hard to enforce.

THE PLATFORM

Nine connected modules, one platform

01
AI Lead Management CRM

02
Customer & Sales Operations

03
Task & Work Management

04
AI Recruitment

05
Staff, Attendance & Payroll

06
Desktop & Field Tracking

07
Purchase & Vendor Invoice AI

08
Documents, Assets & Collaboration

09
COPS 360 AI & Dashboards

HOW IT FITS TOGETHER

One connected business journey

Every module hands its records to the next — so work flows from first enquiry to final report without re-entry.

01

Win customers

Capture leads, manage opportunities, prepare proposals and orders.

02

Deliver work

Coordinate tasks, meetings, documents and delivery.

03

Build the team

Recruit, onboard, and manage attendance, payroll and performance.

04

Control spend

Purchase goods, verify vendor invoices, track payments.

05

See everything

Connected dashboards and COPS 360 AI for instant insight.

Connected data means fewer duplicate records and smoother handoffs between departments.

01

Customers, Sales & Work

Win more business and deliver it on time — with AI doing the repetitive work.



AI-powered lead management

Respond faster. Never lose a lead.

Every lead, conversation and follow-up in one place — with AI drafting the replies so your sales team can focus on selling.

Central lead hub

Leads, contacts, activities and follow-up reminders together.

AI email assistant

Contextual draft replies and reusable, approved templates.

WhatsApp built in

Chat with customers and schedule follow-ups from the CRM.

Calls and meetings

Recordings kept with AI transcripts and summaries.

Proposals and campaigns

AI-assisted proposals and scheduled email campaigns.

CUSTOMER MANAGEMENT

From first contact to final payment

One unified customer record keeps the full sales-to-payment journey visible to everyone who needs it.

01

Proposal

Quotations and proposals from your templates and pricing.

02

Order

Convert approved proposals into customer orders.

03

Invoice

Proforma invoices, GST invoices and credit notes.

04

Payment

Payments, balances and customer statements.

05

Renewal

Contract expiry reminders and next actions assigned.

Unified history: emails, messages, meetings, tasks, files and contracts — all on one customer record.

WORK MANAGEMENT

Know who is doing what, and by when

Assign with clarity

Owners, deadlines, priorities and recurring work.

Checklists & subtasks

Break work into steps with comments, files and screenshots.

Time tracking

Record time at task or checklist level.

Review & verify

Managers review work and verify deliverables.

Workload reports

See overdue tasks, workload and progress at a glance.

Work in context

Discussion stays with the task, not lost in chat apps.

02

Recruitment & People

Hire faster, onboard smoothly, and run HR and payroll from one system.



AI-POWERED RECRUITMENT

Hire faster with a consistent process

AI does the heavy lifting on CVs and interviews. Your recruiters make the decisions.

01

Requisition

Job descriptions, approvals and hiring stages.

02

Collect CVs

From job-portal integrations and recruitment inboxes.

03

AI match

Parse CVs and compare against the job description.

04

Interview

Written, audio or video interviews with AI summaries.

05

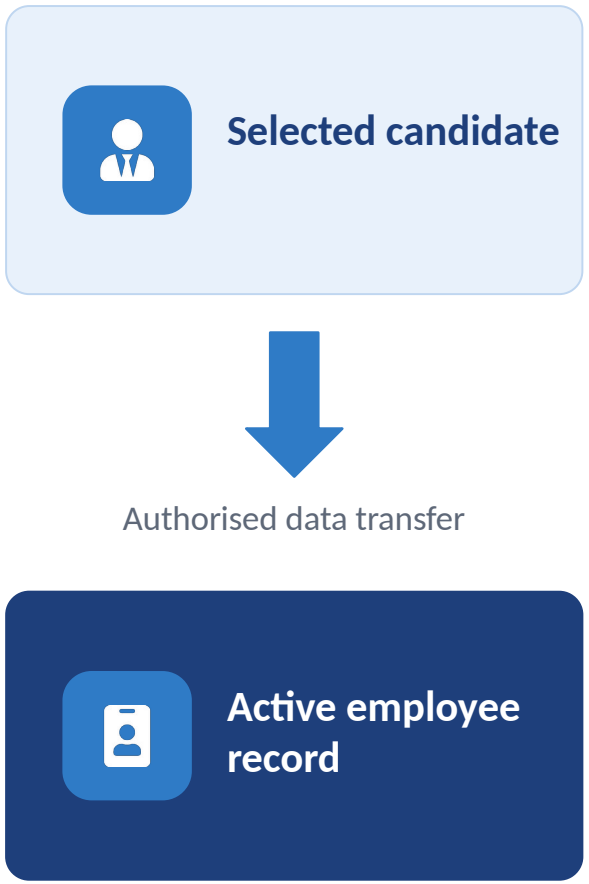
Offer

Offers, checks and handover to onboarding.

Human oversight on every hiring decision — AI recommends, recruiters decide.

SEAMLESS HANDOVER

From candidate to employee, without re-entry



Offer and joining

Offer acceptance, document collection and joining details.

Set up for day one

Department, manager, salary setup, IT access and assets assigned.

Induction tracked

Training, HR and IT checklists followed to completion.

People-led decisions

Hiring and assessment decisions always stay with your team.

EMPLOYEE SELF-SERVICE

One place for every employee's everyday needs

Personal dashboard

Secure login with a personalised home screen.

Employee profiles

Documents, reporting lines and employment history.

Requests & downloads

Leave, HR tickets, announcements and approved documents.

Milestone alerts

Probation, confirmation, training, appraisal and contracts.

Employees help themselves — HR spends less time answering routine questions.

ATTENDANCE & LEAVE

Attendance, leave and shifts — automated

Check-in and shifts

Check-in/out, shift schedules, late arrivals, missed punches and corrections.

Leave management

Leave types, balances, holidays and approval rules.

Overtime and exceptions

Tracked automatically against your configured policies.

Device integration

Connect supported biometric and attendance devices.

Approved attendance flows straight into payroll.

No exporting spreadsheets, no re-keying — salary is calculated from the same attendance data your managers approved.

Payroll you can trust, in four steps

01

Configure

Salary components, allowances, incentives, loans and advances.

02

Calculate

Bulk payroll from attendance and salary rules.

03

Review & approve

Check exceptions; authorised approval before finalising.

04

Pay & distribute

Payslips, statements, certificates and bank payment files.

Every payroll run needs authorised human approval before it is finalised.

EMPLOYEE LIFECYCLE

Every stage of the employee journey

From the first day to the last, every HR event is recorded in one place.



Join

Onboarding and probation

Grow

Transfers, promotions, salary revisions

Develop

Performance reviews, goals, training

Support

Reimbursements, loans, helpdesk

Comply

Assets, policy acknowledgements, HR records

Exit

Clearance, asset return, full-and-final

03

Operations & Purchasing

Track productivity and field work, and keep tight control of every rupee spent.



PRODUCTIVITY INSIGHTS

Understand how work time is spent

Activity overview

App and website use, active and idle time, tracked hours.

Your categories

Classify apps as productive, neutral or non-productive.

Screenshots

Configurable, under your disclosed policy.

Alerts & reports

Exception alerts, hourly summaries and exports.

Used responsibly: activity is an operational signal, not proof of performance — and always disclosed to staff.

FIELD FORCE MANAGEMENT

Coordinate your field team from one screen

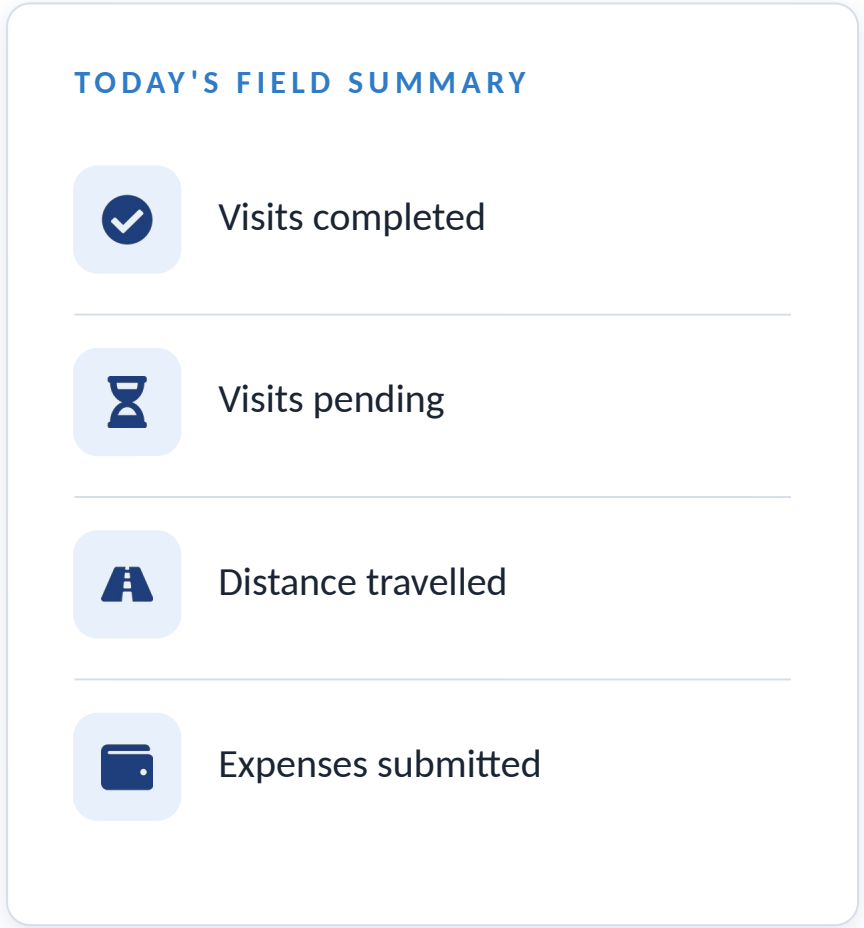
Live team view
Field-team location and status, with employee permission.

Verified customer visits
Check-ins with time, location and proximity checks.

Routes and distance
Route history and estimated distance travelled.

Attendance and expenses
Field attendance, expenses and supporting receipts.

Targets and follow-ups
Assign visits, leads, targets and tasks; review results.



VENDOR INVOICE AI

Upload an invoice. AI does the data entry.



EXTRACTED BY AI

- Supplier
- Invoice number
- Invoice date
- GSTIN
- Taxable amount
- Tax
- Total

Smart checks

Flags duplicate or incomplete invoices for review.

Vendor profiles

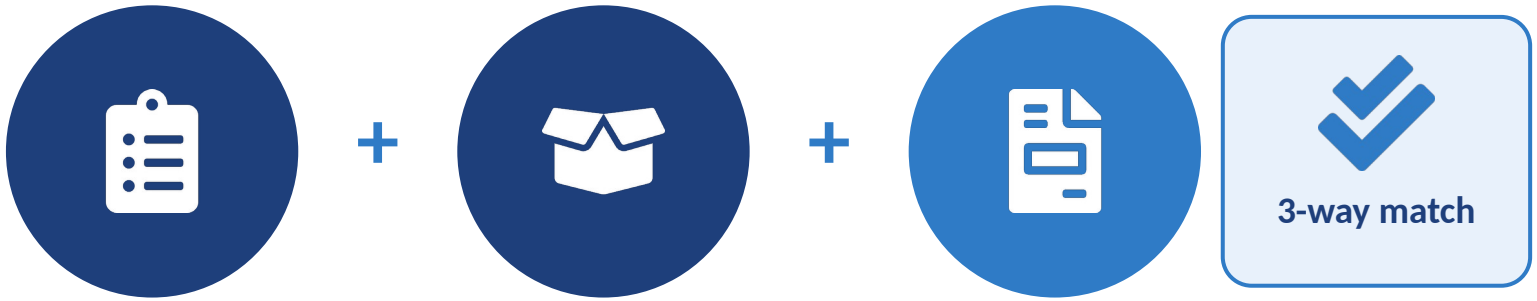
Payment terms and full purchase history.

Purchase orders

Requests and POs with approval workflows.

PURCHASE VERIFICATION

Pay only for what you ordered and received



Purchase order

What you ordered

Goods receipt

What arrived

Vendor invoice

What you're billed

Compare everything

Quantities, rates, tax and invoice totals.

Partial deliveries

Rejected goods and pending quantities tracked.

Payments and budgets

Due dates, paid status, vendor balances, budgets.

Connects to inventory and accounting where integrated.

DOCUMENTS & KNOWLEDGE

Your company knowledge, organised and secure

Central repository

Business documents, employee records and contracts.

Knowledge base

SOPs, policies, guides and FAQs for every team.

Secure vault

Restricted area for sensitive files with audit history.

Versions & history

Access controls, document history and versioning.

Expiry & retention

Reminders, retention rules and controlled downloads.

Permission-aware search

People only find what they're allowed to see.

COMPANY RESOURCES

Track every subscription, asset and resource

Subscriptions

- Software and services
- Renewal dates and costs
- Owners and licence counts
- Renewal reminders

Assets

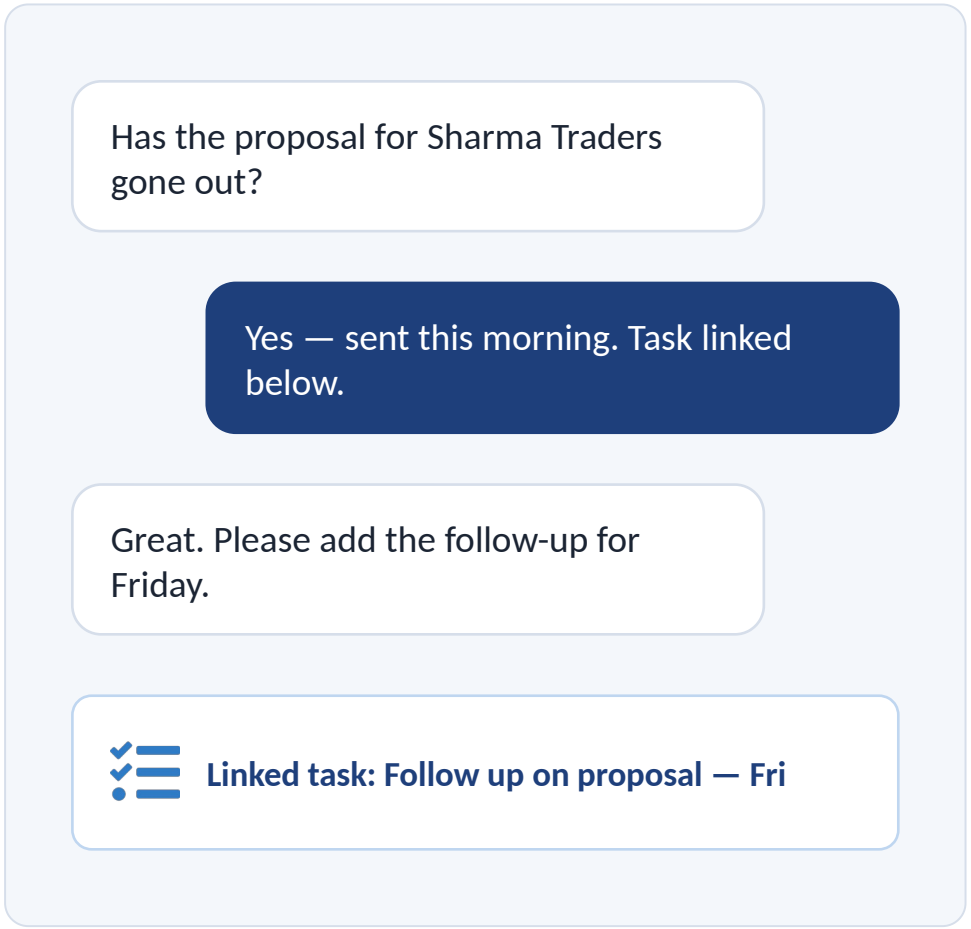
- Serial numbers and maintenance
- Allocation to employees
- Issue and return checklists
- Exit clearance reports

Bookmarks

- Shared team bookmarks
- Personal bookmarks
- Quick links to approved tools
- Portals in one click

TEAM COLLABORATION

Conversations that stay connected to the work



Direct and group chats

Fast communication for every team.

Client collaboration

Secure guest access for customers where enabled.

Linked to the work

Chats connect to tasks, customers and documents.

Announcements

Updates by team or department.

Governed

Access, retention and audit policies applied.

COPS 360 AI ASSISTANT

Ask your business anything

Plain-English questions, answered from your own connected data — within each user's permissions.

- Which customer invoices are overdue?
- Who is absent today?
- Which tasks are overdue this week?
- Which candidates are awaiting interviews?
- Which contracts expire in the next 30 days?

Cross-module answers

Customers, invoices, attendance, recruitment, POs, field visits, contracts, payroll.

Instant summaries

Management summaries and plain-English explanations.

Proactive alerts

Overdue tasks, pending approvals and expiring contracts.

Safe by design

Permission checks, source references, and confirmation for sensitive actions.

MANAGEMENT DASHBOARDS

The whole organisation in one executive view

Sales

Leads, proposals, customer activity and balances

People

Headcount, attendance, leave, onboarding and payroll status

Live view

Operations

Tasks, purchases, field visits and pending approvals

Contracts

Renewals, expiry dates and documents awaiting review

CONTROL & ACCOUNTABILITY

Approvals, alerts and a complete audit trail

01

Approvals

Configurable approval routes for purchases, leave, payroll and other workflows.

02

Alerts

Reminders for overdue tasks, pending approvals, renewals and expiry dates.

03

Escalation

Exceptions escalated according to your organisation's rules.

04

Audit trail

Ownership, timestamps, decisions and change history on record.

Every action has an owner and a record — accountability built into the way you work.

04

Security, Value & Rollout

Responsible automation, clear value for every team, and a practical path to go live.



SECURITY & PRIVACY

Built for security and responsible automation

Role-based access

Least-privilege permissions for every user.

Sensitive data protected

Salary, personal, customer and financial data handled securely.

Human approval

Payroll, payments and employment decisions need sign-off.

Transparent monitoring

Disclosed tracking with proportionate data retention.

Validated before launch

Integrations, AI outputs and compliance settings tested.

Full auditability

Every important change and approval is logged.

Connected to the tools you already use



Configured to you

Departments, roles, approval limits, salary components and leave policies.

AI tested on your data

Invoice extraction, CV matching, summaries and automations.

Careful migration

Data imported and validated before you go live.

Pilot and training

Workflows piloted with users before full rollout.

Integrations depend on each provider's supported APIs and subscriptions.

VALUE FOR LEADERSHIP

What leaders gain with COPS 360



Clarity

A clear view of customers, staff, purchasing and pending work.



Consistency

Standard processes through templates, checklists and approvals.



Time back

Less repetitive administration where automation is validated.



Coordination

Better follow-up, traceability and teamwork across departments.



Better decisions

Decisions based on connected, permission-controlled information.

VALUE FOR EVERY TEAM

Something for every department

Sales	Customer context, follow-ups, proposals and payment visibility
HR	Employee lifecycle, documents, attendance and payroll preparation
Recruitment	Candidate workflow, interview coordination and onboarding handover
Finance & Procurement	Invoices, approvals, vendor balances and reports
Operations & IT	Tasks, field activities, assets, access and service requests

ROLLOUT ROADMAP

A practical, phased path to go live

PHASE 1 • Foundation

- Core records and roles
- CRM and tasks
- Employee profiles and attendance
- Purchasing

PHASE 2 • Automation

- Approvals and payroll
- Documents and reports
- Key integrations

PHASE 3 • Intelligence

- AI invoice extraction
- AI summaries and search
- COPS 360 AI assistant

Throughout: pilot with representative teams, train users, and measure adoption, processing time and error rates.

LAUNCH READINESS

What we validate together before launch

Our implementation team checks each of these with you, so what goes live works as promised.

01

Feature scope

Confirm available features and the configuration each one needs.

02

Integrations

Verify third-party API access, licences and permissions.

03

AI accuracy

Test invoice extraction and AI recommendations on your real examples.

04

Compliance

Confirm current payroll, tax, privacy and employment rules with specialists.

05

Results

Track real time savings and outcomes after go-live.

End-to-end: how it works in practice

1. A new lead enters the CRM and gets a timely follow-up.
2. A proposal is prepared and converted into a customer order.
3. Tasks coordinate delivery, while attendance and payroll run centrally.
4. A purchase order is raised; AI reads the vendor invoice and flags mismatches.
5. COPS 360 AI shows managers overdue work and outstanding actions.

One connected organisation process system





Thank you

Connect your people, customers, processes and information.

Book your free demo

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