



# Evolving together

Features included in new plans

## Core

2023

2025

✓	✓	Custom tasks and notifications	
✓	✓	Report library	
✓	✓	Agreements	
✓	✓	Company org. chart	
✓	✓	Communities	
✓	✓	Assignment of ranks and roles	
	✓	Manage financial workspaces	
	✓	Movement history with audit log	
	✓	Store and manage your documents in the cloud	
	✓	Custom dimensions in cost centers	Enterprise
	✓	Create tasks for document templates in onboarding workflows	Enterprise
	✓	Implement secure sign-in authentication	Enterprise

## Highlighted features

- ✓ Visual company org. Chart to map your teams
- ✓ Cloud storage for all your documents
- ✓ Secure sign-in with advanced authentication



## Trust channel

- ✓ Confidential and anonymous report
- ✓ Two-way communication
- ✓ Centralized case management
- ✓ Company org. chart
- ✓ Multiple sending channels
- ✓ Smart alerts and notifications
- ✓ Complete audit log

## Highlighted features

- ✓ Confidential and anonymous report
- ✓ Two-way communication
- ✓ Complete audit log

New product



## Time off

2023

2025

- |                                     |                                     |  |
|-------------------------------------|-------------------------------------|--|
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Real-time attendance information dashboard   |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Annual monitoring of worked time balance   |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Flexible Time Off counter configuration  |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Definition of breaks: fixed, semi-flexible, or flexible; creation of paid and unpaid options |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Presence control alerts  |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Multi-level approvals <b>Enterprise</b>  |
| <input type="checkbox"/>            | <input checked="" type="checkbox"/> | Control of absence duration by setting a min and max duration of the request                 |
| <input type="checkbox"/>            | <input checked="" type="checkbox"/> | Compensation of overtime with Time Off or/and Payroll  |
| <input type="checkbox"/>            | <input checked="" type="checkbox"/> | Limitations for the number of days employees can take from future cycles                     |

### Upcoming features for new plans

- ☒ Personalized rules for automatic time off request review
- ☒ Real-time recommendations for leave approvals based on personalized rules
- ☒ Automated time off approval based on personalized rules and approval flows



## Time tracking

2023

2025

<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Flexible time off controller settings
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Real-time attendance information dashboard
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Annual monitoring of worked time balance
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Attachments to time off requests
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Designation and control of paid absence durations
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Overtime compensation
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Extra Hours in Tranches – Majoration
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Access to employee Bank of Hours
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Automate breaks to streamline the time tracking process <span>Enterprise</span>

## Upcoming features for new plans

- ☒ Track planned breaks automatically



## Shift Management

2023

2025

- |                                     |                                     |  |
|-------------------------------------|-------------------------------------|--|
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Creating shifts individually and in bulk               |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Simple and rotating management of breaks and shifts    |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Detailed shift settings (location, workspace, role)    |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Alerts in case of planning conflicts                   |
| <input type="checkbox"/>            | <input checked="" type="checkbox"/> | Shift planning with an intuitive drag-and-drop feature |
| <input type="checkbox"/>            | <input checked="" type="checkbox"/> | Creation of breaks in custom and rotating shifts       |
| <input type="checkbox"/>            | <input checked="" type="checkbox"/> | Overtime in shifts                                     |
| <input type="checkbox"/>            | <input checked="" type="checkbox"/> | Employee shift swap via mobile app                     |
| <input type="checkbox"/>            | <input checked="" type="checkbox"/> | Read and create shifts via API                         |
| <input type="checkbox"/>            | <input checked="" type="checkbox"/> | Automatic shift planning <span>Enterprise</span>       |

## Upcoming features for new plans

- ☒ Optimized process for automatic shift creation
- ☒ Smart coverages, built by AI based on your existing ones.



## Compensation

2023

2025

<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Export of payroll data
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	SEPA payment generation
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Information on payslips and cost evolution
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Communication with your manager through Factorial Professionals
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Automated payslip distribution
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Data export (new hires, changes, terminations, payroll variables, etc.)
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Communicate with your bookkeeper through Professionals
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Synchronize with your payroll provider (DATEV, a3innuva, Silae)

## Upcoming features for new plans

- ☒ Synchronization with Goals/Performance

New product



## Benefits

- ✓ Centralized platform for flexible benefits
- ✓ Automation with payroll export
- ✓ Benefits for meals, transportation, daycare, training, and wellness.
- ✓ Integrated tax compliance
- ✓ Multi-device access (web and mobile)
- ✓ Payments via integrated digital card (Apple/Google Wallet)

## Highlighted features

- ✓ Automatic approvals
- ✓ Preconfigured quotes and categories by benefit type
- ✓ Real-time balance check (mobile and desktop)
- ✓ Integration with payroll and accounting

New product



## Recruiting

2023

2025

- ✓ Bulk CV import and ATS migration
- ✓ Tags for candidate categorization
- ✓ Data consent management (GDPR)
- ✓ Customization of hiring stages
- ✓ Analytics: time-to-hire, candidate funnel, diversity, and sources
- Calls or WhatsApp without adding the candidate to an application
- Candidate feedback can be added in Candidate Profile
- Advanced metrics, like time-to-hire and time-to-offer
- Import of job openings and candidate data
- Job offer post across +250 job boards
- Automatically create new candidates with the CVs information **Enterprise**
- Automatically sending and sign of the offer letter **Enterprise**
- Configuration of roles to control access in the hiring process **Enterprise**
- Templates for recurrent application questions **Enterprise**

### Upcoming features for new plans

- ✓ Easier candidates data collection
- ✓ AI-suggested candidates for optimized hiring
- ✓ AI-powered talent pool search



## Performance

2023

2025

✓	✓	360° reviews for holistic feedback
✓	✓	Management and tracking of objectives and KR's
✓	✓	Creation of action plans based on evaluations
✓	✓	Competencies with spider chart
✓	✓	AI-generated summaries and objective alignment
✓	✓	Insights and participation rate in evaluations
	✓	Creation, manage and track goals and KR's
	✓	Instant feedback can be given and received
	✓	Performance trends with score distribution reports (Talent Analytics)
	✓	Section weights can be added to the final performance score
	✓	Weighting of evaluation sections for final score <b>Enterprise</b>
	✓	Reviewer weights can be assigned in the evaluation process <b>Enterprise</b>

### Upcoming features for new plans

- ✓ Legal signature required (via Signaturit) with date
- ✓ Career path pages to guide growth
- ✓ Set and track employee goals



## Trainings

2023

2025

- |                                     |                                     |  |
|-------------------------------------|-------------------------------------|--|
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Training analytics and KPI dashboard                               |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Tracking attendance and course completion                          |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Exporting training summaries and participants to Excel/CSV         |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Linking competencies with trainings                                |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | MyTraining access in the mobile app                                |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Automatic certificate generation and management                    |
| <input type="checkbox"/>            | <input checked="" type="checkbox"/> | Launch of satisfaction surveys                                     |
| <input type="checkbox"/>            | <input checked="" type="checkbox"/> | Post-training effectiveness surveys sending                        |
| <input type="checkbox"/>            | <input checked="" type="checkbox"/> | Course validity definition to enable expiration alarms             |
| <input type="checkbox"/>            | <input checked="" type="checkbox"/> | Knowledge tests to evaluate your teams after completing a training |

### Upcoming features for new plans

- ☒ LMS with course builder and learning experience
- ☒ AI-built surveys
- ☒ Faster and easier calendar invites



## Engagement

2023

2025

- |   |   |  |
|---|---|--|
| ✓ | ✓ | Climate surveys  |
| ✓ | ✓ | Workplace climate reports and analytics                            |
| ✓ | ✓ | Surveys to gather feedback   |
| ✓ | ✓ | Custom survey templates  |
| ✓ | ✓ | Team pulse   |
| ✓ | ✓ | Pulse analytics  |
|   | ✓ | Peer-to-peer kudos sharing   |
|   | ✓ | Survey templates   |
|   | ✓ | Automated surveys using workflows                                  |
|   | ✓ | Daily pulse check-ins to proactively track employee sentiment      |
|   | ✓ | AI-powered reports on trending topics from pulse check-in comments |
|   | ✓ | AI chat to analyze and enrich the 1:1 meeting                      |

Acceso Beta

### Upcoming features for new plans

- ✓ Surveys AI Co-creation
- ✓ Instant AI survey translations
- ✓ Advanced 1:1s for better insights and actions



## Expense

S

2023

2025

- |   |   |   |
|---|---|---|
| ✓ | ✓ | Real-time expense tracking with reports and smart alerts        |
| ✓ | ✓ | Linking expenses to projects and advanced categorization        |
| ✓ | ✓ | Card information: details, history, budget, and holder info     |
| ✓ | ✓ | Expense reimbursement through payroll <b>Enterprise</b>         |
|   | ✓ | Payments via SEPA transfers <b>Enterprise</b>                   |
|   | ✓ | Spending dashboard showing company's expenses                   |
|   | ✓ | Expense alerts to enable better oversight and faster resolution |
|   | ✓ | Manage up to 5 physical cards for free <b>Enterprise</b>        |
|   | ✓ | Budget oversight and control                                    |
|   | ✓ | Transparency and accountability                                 |
|   | ✓ | Improved financial planning                                     |

## Upcoming features for new plans

- ✓ Workflow abstraction that allows to create, customise and execute workflows across multiple products



## Project management

2023

2025

- |   |   |   |
|---|---|---|
| ✓ | ✓ | Subprojects and duplication of complete structures                                |
| ✓ | ✓ | Project details with start date, due date, internal code, and billable status     |
| ✓ | ✓ | Classification of projects as internal/external and billable/non-billable         |
| ✓ | ✓ | Full integration via API <span>Enterprise</span>                                  |
| ○ | ✓ | Activities performed by users can be tracked in the Activity log                  |
| ○ | ✓ | Expenses can be tracked and associated with your project                          |
| ○ | ✓ | Hours can be tracked from the Clock-In widget                                     |
| ○ | ✓ | Project Planning tool to help organize, allocate resources and detect bottlenecks |
| ○ | ✓ | Invoices can be issued to clients (link with CRM)                                 |

### Upcoming features for new plans

- ✓ Bill rate system to gain real-time visibility on true project profitability
- ✓ Better budgeting by assigning employee expenses and purchase invoices to projects



## Procurement management

2023	2025
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Centralized workflows for purchase requests and orders
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Custom approval workflows by expense type
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Export of purchase orders
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Single-use cards linked to orders
<input type="checkbox"/>	<input checked="" type="checkbox"/> Smart invoice digitization with OCR
<input type="checkbox"/>	<input checked="" type="checkbox"/> Payments with SEPA
<input type="checkbox"/>	<input checked="" type="checkbox"/> Integration with ERP's
<input type="checkbox"/>	<input checked="" type="checkbox"/> Synchronization with Banks
<input type="checkbox"/>	<input checked="" type="checkbox"/> Approvals for invoices

### Upcoming features for new plans

- ☒ Configurable purchase request forms
- ☒ Workflow abstraction that allows to create, customise and execute workflows across multiple products



## Software management

- ✓ Reports dashboard
- ✓ Payment approval workflow
- ✓ Automated SaaS subscription payments with Factorial Cards
- ✓ Software license management
- ✓ License cost allocation
- ✓ Export of detailed transactions

### Upcoming features for new plans

- ✓ Handling of new licenses and associated costs



## CRM

New product

- ✓ Generate and edit invoices easily for every deal
- ✓ Preview invoices before sending them
- ✓ Send invoices directly from Factorial
- ✓ Track payment status and due dates
- ✓ Generate and track quotes easily
- ✓ Convert approved quotes into invoices
- ✓ Manage client records and keep them organised
- ✓ Store all documents, quotes and invoices in one place
- ✓ Send, receive and track all client communication via email
- ✓ Track every opportunity
- ✓ Collaborate in real-time to move deals smoothly through each stage

### Upcoming features for new plans

- ✓ Integration of deals, pipelines and quotes
- ✓ In-app messages, for seamless collaboration



## IT Inventory

New product

- ✓ Create, edit, assign and retire devices with structured workflows
- ✓ Bulk import devices with the Guided Universal Importer
- ✓ Manage complete device profiles: type, model, serial number, etc.
- ✓ Track the full history of each device
- ✓ Filter and group devices by multiple criteria
- ✓ Apply bulk actions to delete or reassign multiple devices at once
- ✓ Control access through permissions
- ✓ Integrate with Job Catalog to define role-based equipment kits
- ✓ Integrate with Onboarding to automatically suggest and assign devices during the hiring flow

### Upcoming features for new plans

- ✓ Standardized handover documents directly from Inventory for each employee
- ✓ Inventory data exported in CSV/XLSX formats for reporting and audits

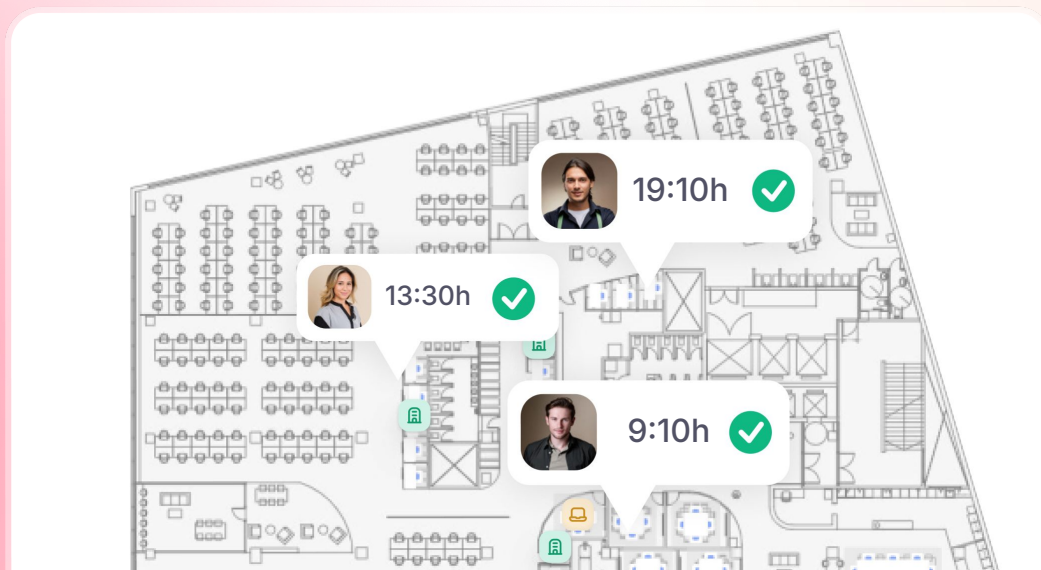




Space management

# A scalable solution to manage every **square meter**.

Easily manage desks, meeting rooms, and shared areas directly from the same platform your team already uses.



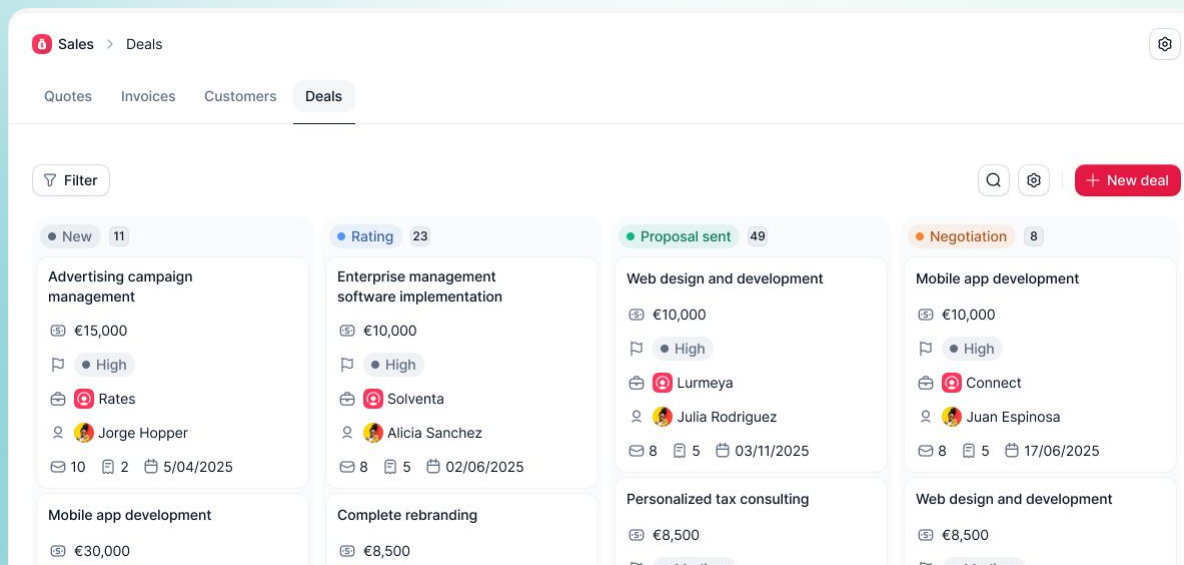
CRM

Available in Sept



# Transform customer relationships into lasting success

Enable your team to have full control over the sales process — reduce administrative workload, improve collaboration, and spend more time selling.



Beta access only

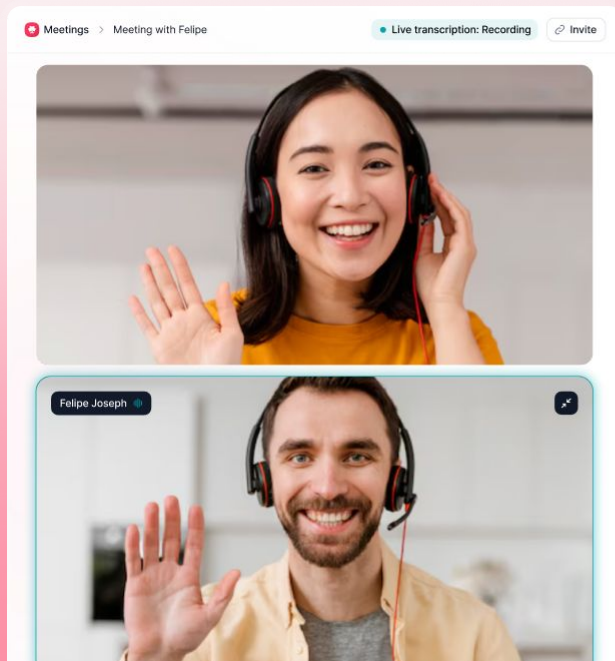


AI Meetings

AI-powered

# Turn **feedback** into action every week

Empower your managers to lead 1:1 meetings with AI assistance  
and no prior preparation needed.



## Marta / Felipe 1:1 (June)

### Mood tracking 🧡😊😐😞😡😤

[Employee name]'s average mood this week: ^

- 😊 Monday: More training opportunities would help us develop our skills.
- 😐 Tuesday: Increasing project variety would improve job satisfaction.
- 😊 Wednesday: More training opportunities would help us develop our skills.
- 😐 Thursday: Recognition of hard work is appreciated and motivates us.

### Last meeting context

We discussed your role as Product Designer in the ATS.

We reviewed the first wireframes of the candidate dashboard.

We focused on scheduling challenges for recruiters and candidates.

Maternity leave next month.

### Today's agenda

- ☐ Explore innovative designs in the Performance module.  
Share upcoming vacation plans in the Philippines and work-life

LMS

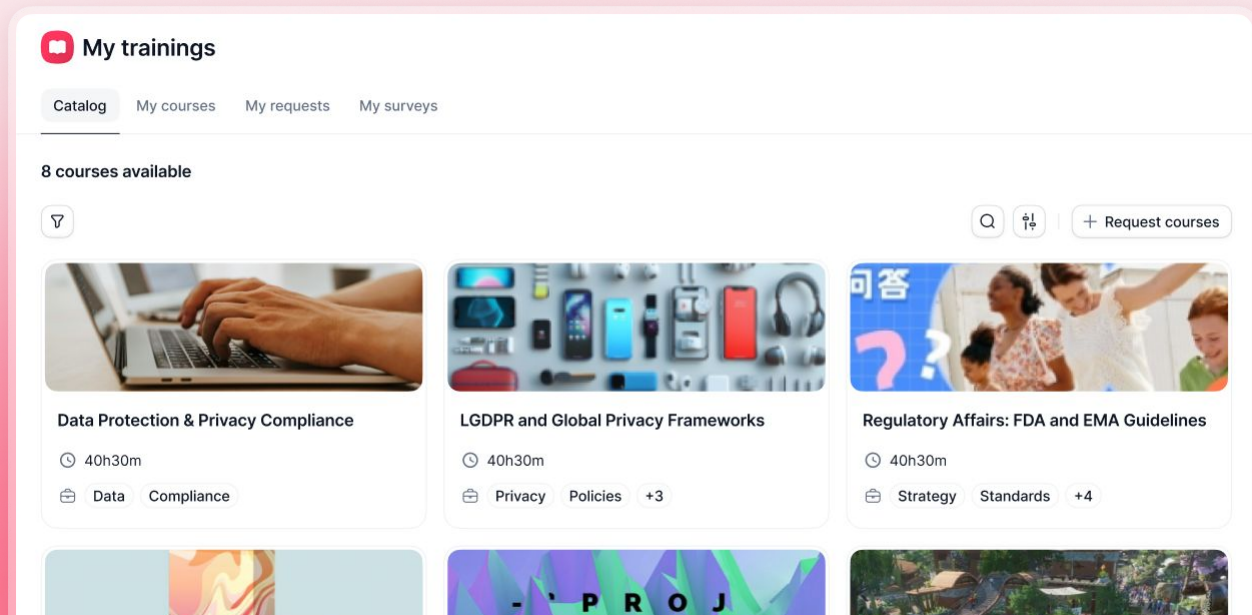
AI powered

Available in Nov



# Design a **learning experience** that drives team performance

Create essential courses, track progress, ensure compliance, and empower managers to support professional development.



# One

Your new AI Agent

AI That Works. With You.

**Coming in January 2026**

early access rolling out Q4 2025



Hi, I'm One.

January 2026

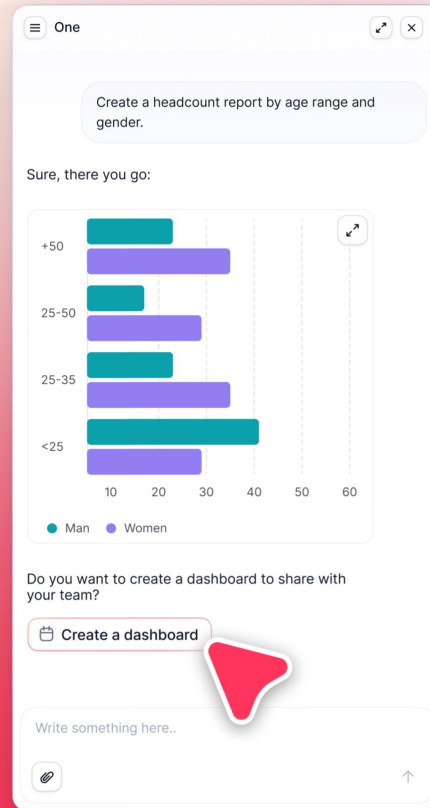
# Reports that run themselves

ONE pulls live data, analyses it and creates clear reports. Spot trends, identify risks, track costs, and act on them before it's too late.

Act on insights, not hunches.

**Cut report prep from hours to minutes.**

**No more scattered data.**



January 2026

# Collaborate together as one

ONE acts as a co-worker, helping you co-create surveys, reviews and forms in minutes.

Converse naturally to edit, refine, and improve on the fly, until you reach the output you want.

Centralised, consistent and actionable.

**Turn ideas into outcomes, fast.**

**Context-aware insights built for your business.**

The screenshot displays the ONE AI co-worker interface for creating a survey. On the left, a 'Questions' sidebar lists several prompts: 'Workplace safety pro...', 'How familiar are you...', 'Which of the followin...', 'Evaluating Safety in...', 'How would you rate t...', 'How many workplace...', and 'What improvements...'. The main workspace shows a 'Section' titled 'Workplace safety procedure' with a description: 'Workplace safety procedures are... They include emergency protoc... to ensure a secure work environ...'. Below this, a 'Single choice' question is visible: 'How familiar are you with ou...'. The options are: 'Very familiar', 'Somewhat familiar', 'Not very familiar', and 'Not familiar at all'. A chat window on the right shows a conversation with the AI co-worker. The chat starts with a message: 'Let's create a a knowledge test to send out to the team.' This is followed by a list of tasks: 'Creating sections', 'Setting multiple and single choice questions', and 'Adding descriptions and rating questions'. The chat concludes with the message: 'Great! Your knowledge test is done. Would you like to make any edits?'. At the bottom of the chat window, there is a text input field with the placeholder 'Write something here..'. The interface also includes a '+ Add content' button at the top right and a 'One' header for the chat window.

Questions

- Workplace safety pro... 2
- How familiar are you...
- ✓ Which of the followin...
- Evaluating Safety in... 3
- ☆ How would you rate t...
- 1-9 How many workplace...
- Tr What improvements...

Section

**Workplace safety procedure**

Workplace safety procedures are...  
They include emergency protoc...  
to ensure a secure work environ...

Single choice \*

**How familiar are you with ou**

- ☐ Very familiar
- ☐ Somewhat familiar
- ☐ Not very familiar
- ☐ Not familiar at all

Multiple choice \*

**Which of the following safety measures have you received training for?**

One

Let's create a a knowledge test to send out to the team.

- ✓ Creating sections
- ✓ Setting multiple and single choice questions
- ✓ Adding descriptions and rating questions

Great! Your knowledge test is done. Would you like to make any edits?

Write something here..

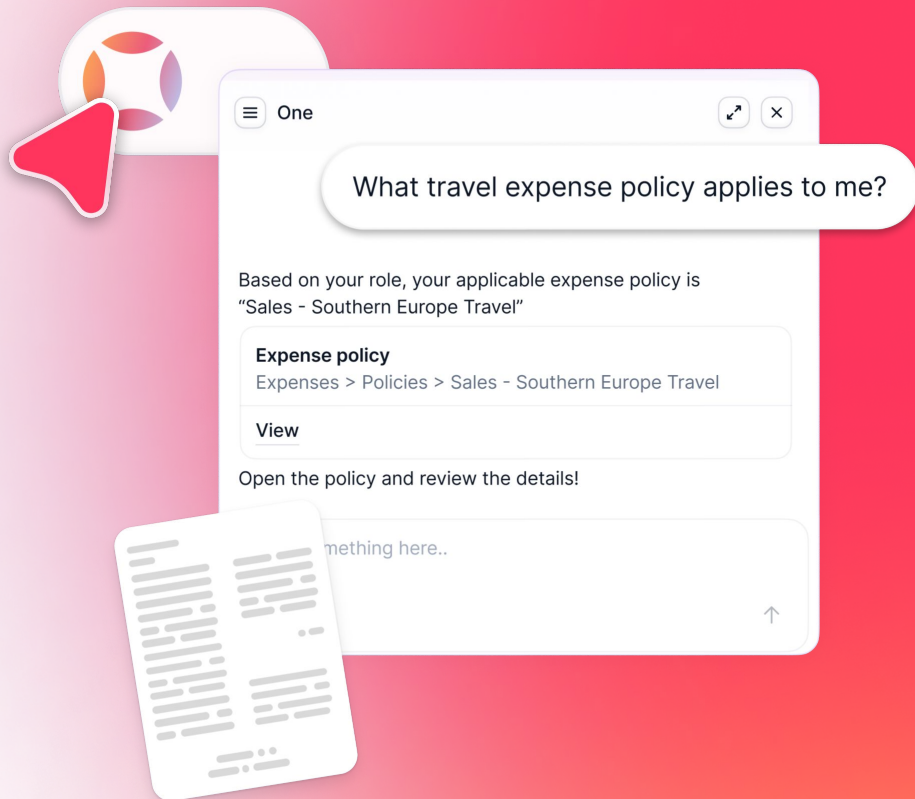
Q1 2026

## Your team's new go-to

From policies to contracts, employees ask ONE – not you. Answers are instant, accurate and based on your Factorial data.

**Free yourself from daily interruptions.**

**Fewer bottlenecks. More clarity.**





Where people grow