

# upbooks

## Introduction

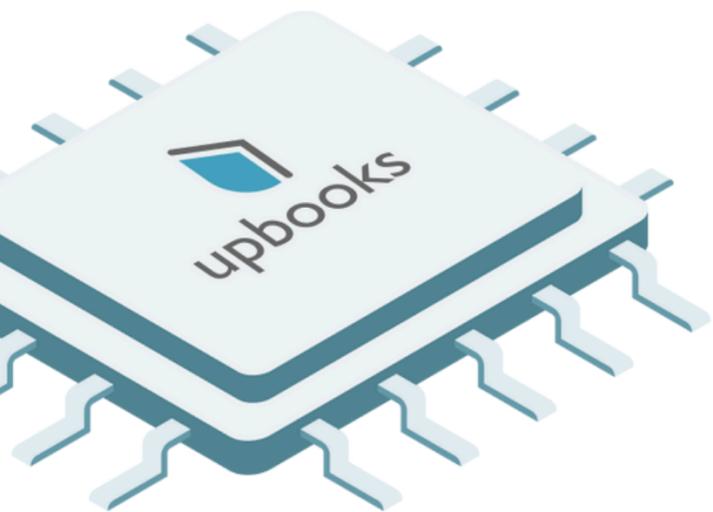
Welcome to upbooks - Your Ultimate Financial and Business Management Tool!





**"Stay Ahead of the Game with  
upbooks:**

**Your Ultimate Business  
Management Tool!"**



 upbooks

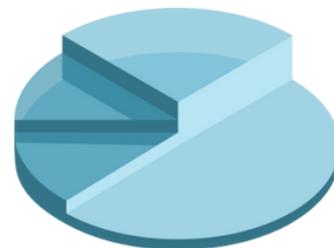


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[upbooks.io](https://upbooks.io)

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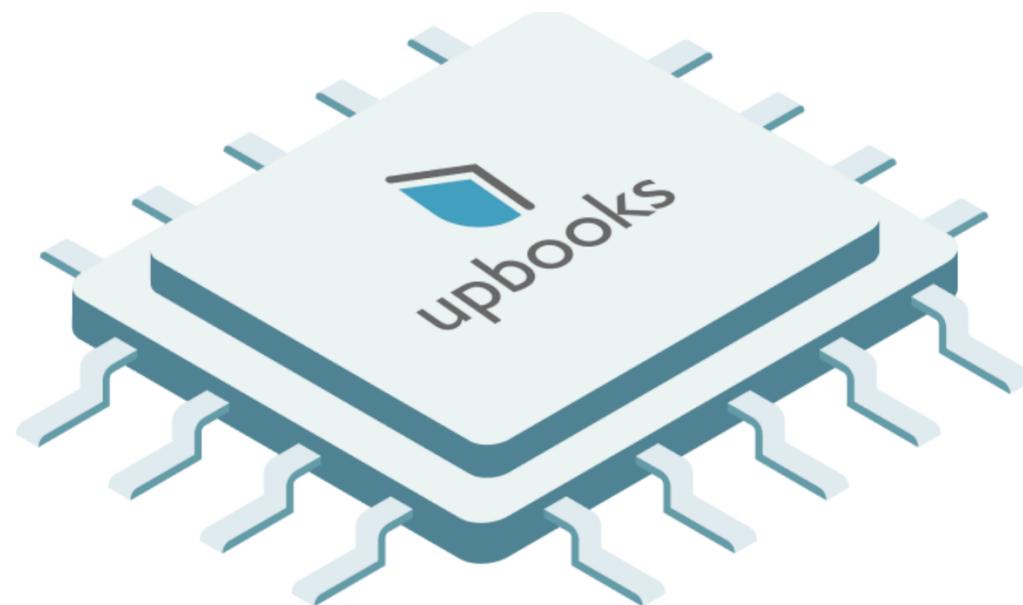
# Introduction

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## Your Path to Financial Empowerment

upbooks is more than just a financial and business management tool—it's your partner in unlocking the potential of your business. Seamlessly integrating innovation and efficiency, upbooks empowers entrepreneurs, small and medium-sized enterprises, and professionals to take charge of their financial journey and pave the way for sustainable growth.

With an intuitive interface designed for ease of use, upbooks transforms complex financial tasks into seamless experiences.



# Solutions

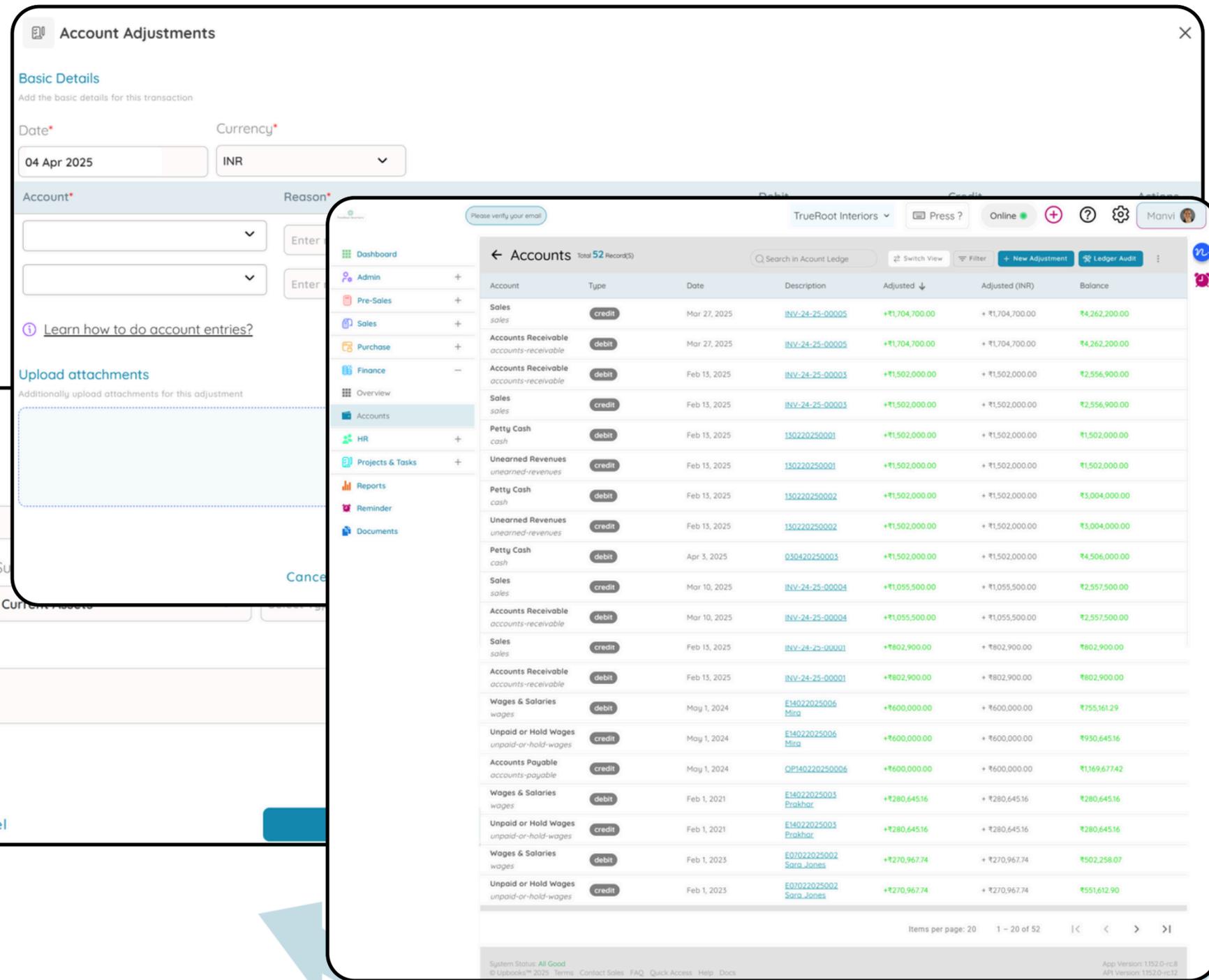


# Accounting & Finance

Easily manage your finances with automated transactions, real-time payment reconciliation, and instant financial tracking.

## Features

- Automated Accounting
- Account Ledger
- Manual Accounting Entries
- Accounting Reports
- GST & Compliance Ready



The screenshot displays the 'Account Adjustments' form and the 'Accounts' ledger. The 'Account Adjustments' form includes fields for Date (04 Apr 2025), Currency (INR), Account, and Reason. Below the form is a section for 'Upload attachments'. The 'Accounts' ledger shows a table of account entries with columns for Account, Type, Date, Description, Adjusted, Adjusted (INR), and Balance.

Account	Type	Date	Description	Adjusted	Adjusted (INR)	Balance
Sales sales	credit	Mar 27, 2025	INV-24-25-00005	+₹1,704,700.00	+ ₹1,704,700.00	₹4,262,200.00
Accounts Receivable accounts-receivable	debit	Mar 27, 2025	INV-24-25-00005	+₹1,704,700.00	+ ₹1,704,700.00	₹4,262,200.00
Accounts Receivable accounts-receivable	debit	Feb 13, 2025	INV-24-25-00003	+₹1,502,000.00	+ ₹1,502,000.00	₹2,556,900.00
Sales sales	credit	Feb 13, 2025	INV-24-25-00003	+₹1,502,000.00	+ ₹1,502,000.00	₹2,556,900.00
Petty Cash cash	debit	Feb 13, 2025	130220250001	+₹1,502,000.00	+ ₹1,502,000.00	₹1,502,000.00
Unearned Revenues unearned-revenues	credit	Feb 13, 2025	130220250001	+₹1,502,000.00	+ ₹1,502,000.00	₹1,502,000.00
Petty Cash cash	debit	Feb 13, 2025	130220250002	+₹1,502,000.00	+ ₹1,502,000.00	₹3,004,000.00
Unearned Revenues unearned-revenues	credit	Feb 13, 2025	130220250002	+₹1,502,000.00	+ ₹1,502,000.00	₹3,004,000.00
Petty Cash cash	debit	Apr 3, 2025	030420250001	+₹1,502,000.00	+ ₹1,502,000.00	₹4,506,000.00
Sales sales	credit	Mar 10, 2025	INV-24-25-00004	+₹1,055,500.00	+ ₹1,055,500.00	₹2,557,500.00
Accounts Receivable accounts-receivable	debit	Mar 10, 2025	INV-24-25-00004	+₹1,055,500.00	+ ₹1,055,500.00	₹2,557,500.00
Sales sales	credit	Feb 13, 2025	INV-24-25-00001	+₹802,900.00	+ ₹802,900.00	₹802,900.00
Accounts Receivable accounts-receivable	debit	Feb 13, 2025	INV-24-25-00001	+₹802,900.00	+ ₹802,900.00	₹802,900.00
Wages & Salaries wages	debit	May 1, 2024	E14022025006 Mira	+₹600,000.00	+ ₹600,000.00	₹755,161.29
Unpaid or Hold Wages unpaid-or-hold-wages	credit	May 1, 2024	E14022025006 Mira	+₹600,000.00	+ ₹600,000.00	₹930,645.16
Accounts Payable accounts-payable	credit	May 1, 2024	OP140220250006	+₹600,000.00	+ ₹600,000.00	₹1,169,677.42
Wages & Salaries wages	debit	Feb 1, 2021	E14022025003 Prakhar	+₹280,645.16	+ ₹280,645.16	₹280,645.16
Unpaid or Hold Wages unpaid-or-hold-wages	credit	Feb 1, 2021	E14022025003 Prakhar	+₹280,645.16	+ ₹280,645.16	₹280,645.16
Wages & Salaries wages	debit	Feb 1, 2025	E07022025002 Sara Jones	+₹270,967.74	+ ₹270,967.74	₹502,258.07
Unpaid or Hold Wages unpaid-or-hold-wages	credit	Feb 1, 2025	E07022025002 Sara Jones	+₹270,967.74	+ ₹270,967.74	₹551,612.90

# CRM - Customer Relationship Management

Streamline and track all customer interactions for smooth communication and relationship building. Manage enquiries, proposals, orders, and payments within a single integrated system.

## Features

- Customer Management
- Customer Files
- Customer Ledger
- Customer Portal
- Customer Enquiries
- Proposal Management
- Order and Payments

The image displays three overlapping screenshots of a CRM software interface. The top screenshot shows a dashboard with a sidebar menu containing 'Dashboard', 'Enquiries', 'Proposals', and 'Orders'. The main content area displays 'Company Name' and two summary cards: 'Due Payments ₹23,229' and 'Proposals 234'. Below these is a 'Pending Invoices' table with columns for Invoice #, Invoice Date, Order #, Invoice Amount, Final Amount (INR), Due Date, Status, and Actions. A row shows an invoice for ₹100.0 due on Sep 14, 2024, with a 'Confirmed' status and a 'Pay now' button.

The middle screenshot shows a 'Profile' page for a customer. It includes a profile picture, a 'Display Name' field, and a 'Contact Details' section with fields for First Name, Last Name, Email, Mobile Number, and Work Phone. There are also fields for Designation and Department. 'Save' and 'Cancel' buttons are at the bottom.

The bottom screenshot shows a 'Quote Management' screen for PRN-299282. It features a 'Quote Title' field with a company name, and 'Accept' and 'Reject' buttons. Below is a table of proposal details: Proposal Number (PRN - 00003), Proposal Date (Oct 24, 2024), Branch Name (Head Office), and PO Number (1289). An 'Order Items' table lists one item: 'Ecograder 500' with a quantity of 2 and an amount of ₹60,000.00. A summary table at the bottom shows Total ₹60,000.00, Sub Total ₹60,000.00, and Final ₹60,000.00.

# Vendor Management

Effortlessly add and manage vendors, track supplies, and ensure tax compliance. Monitor lead times, manage supplier credits, and automate purchase order processing for efficient procurement.

## Features

- Item Supplied.
- Lead Time
- Credit Limit
- Expense Files
- Purchase Orders
- GST & Tax Compliance



The screenshot displays two overlapping views of the TrueRoot Interiors software interface. The top view shows the 'Expenses' management screen, and the bottom view shows the 'Vendors' management screen.

**Expenses Management Screen:**

- Header: TrueRoot Interiors, Press?, Online, Manvi
- Section: Expenses (Total 8 Record(S))
- Search: Search in expenses
- Filters: fiscal year, gst/non-gst, category
- Table Columns: Expense#, Branch Name, Title, Type, For, Final Amt., Final Amt. (INR), Date, Notes, Receipts, Status, Actions
- Table Data:

Expense#	Branch Name	Title	Type	For	Final Amt.	Final Amt. (INR)	Date	Notes	Receipts	Status	Actions
E14022025006 NONGST	Head Office	Payroll For Employee Mira	Wages	Mira	₹600,000.00	₹600,000.00	May 1, 2024		Uploaded	paid Accounts Payable Paid on May 1, 2024	...
E14022025008 NONGST	Head Office	Payroll For Employee Shreya Bansal	Wages	Shreya Bansal	₹50,000.00	₹50,000.00	Feb 1, 2024		Uploaded	paid Advertising Paid on Feb 1, 2024	...

**Vendors Management Screen:**

- Header: TrueRoot Interiors, Press?, Online, Manvi
- Section: Vendors (Total 9 Record(S))
- Search: Search vendors
- Table Columns: Name, Location, City, Tax Treatment, Items Supplied, Actions
- Table Data:

Name	Location	City	Tax Treatment	Items Supplied	Actions
Han Lee	Chongqing	China	GST	1 Items	...
Milan Joe	Andhra Pradesh	India	GST	1 Items	...
Parth Jha	Donegal	Ireland	GST	1 Items	...
Sarah Jonas	Dubai	Uae	GST	1 Items	...
Mohan Ray	Chandigarh	India	GST	1 Items	...
John Doe	Los Angeles	Usa	GST	1 Items	...
Ahmed Ali	Agusan Del Sur	Philippines	GST	2 Items	...
Kevin Tan	Sicilia	Italy	GST	1 Items	...
Aarjit Patel	Lucknow	India	GST	1 Items	...

System Status: All Good  
© Upbooks™ 2025 Terms Contact Sales FAQ Quick Access Help Docs  
App Version: 1152.0-rc.8  
API Version: 1152.0-rc.12

# Order Management & Invoicing

Simplify order creation, invoicing, and payments with automated tracking. Efficiently manage recurring invoices, handle duplicate orders, and use integrated payment gateways for seamless transactions.

## Features

- Duplicate Orders
- Recurring Invoices
- Proforma Invoice
- Invoice Due Date Reminders
- Payment Gateway Integration.
- Sales Reports & Analytics



The screenshot shows the 'Invoices' dashboard with a table of invoice records. A dropdown menu is open over the 'Status' column, showing options: Draft, Confirmed, Sent, Paid, Partially Paid, and Cancelled. The table columns include Invoice#, Invoice Date, Order Number(s), Branch Name, Client Name, Amt., Final Amt., Final Amt. (INR), Due Date, Status, and Actions.

Invoice#	Invoice Date	Order Number(s)	Branch Name	Client Name	Amt.	Final Amt.	Final Amt. (INR)	Due Date	Status	Actions
INV-25-26-00001	Apr 1, 2025	SO-00006	Head Office	Arvind Patel	0.00	₹6,000.00	₹6,000.00	Apr 1, 2025	PAID	...
INV-24-25-00005	Mar 27, 2025	SO-00005	Head Office	Aarav Kapoor	0.00	₹1,704,700.00	₹1,704,700.00	Mar 27, 2025	CONFIRMED	...
INV-24-25-00004	Mar 10, 2025	SO-00004	Head Office	Carlos Mendes	0.00	₹1,055,500.00	₹1,055,500.00	Mar 10, 2025	CONFIRMED	...
					0.00	₹1,502,000.00	₹1,502,000.00	Feb 13, 2025	PAID	...
					0.00	₹252,000.00	₹252,000.00	Feb 13, 2025	PAID	...
					0.00	₹802,900.00	₹802,900.00	Feb 13, 2025	PAID	...

The screenshot shows the 'Add Order' form with various input fields and sections. The 'Basic Details' section includes Client (Sofia DeLuca) and Proposals (PRN-00004). The 'Order Details' section includes Order Date (03 Apr 2025) and Sales Person (Arpit Yadav, Manvi, Prakhar, Sara Jones). The 'Select Items' section shows a list of items with checkboxes for Service and Product. The 'Additional Details' section has a text area for Notes.

The screenshot shows the 'Sales Orders' dashboard with a table of order records. The table columns include Order#, Date, Branch Name, Client Name, Item(s), Total Amt., Tax Amt., Discount Amt., Final Amt., Final Amt. (INR), and Status.

Order#	Date	Branch Name	Client Name	Item(s)	Total Amt.	Tax Amt.	Discount Amt.	Final Amt.	Final Amt. (INR)	Status
SO-00007	Apr 3, 2025	Head Office	John Mitchell Restaurant	3	₹42,000.00	₹0.00	--	₹42,000.00	₹42,000.00	CONFIRMED
SO-00006	Apr 1, 2025	Head Office	Arvind Patel	3	₹6,000.00	₹0.00	--	₹6,000.00	₹6,000.00	PAID
SO-00005	Mar 27, 2025	Head Office	Aarav Kapoor	3	₹1,704,700.00	₹0.00	--	₹1,704,700.00	₹1,704,700.00	INVOICED
SO-00004	Mar 10, 2025	Head Office	Carlos Mendes	5	₹1,055,500.00	₹0.00	--	₹1,055,500.00	₹1,055,500.00	INVOICED
SO-00003	Feb 13, 2025	Head Office	Brooks & Associates Consulting	2	₹1,502,000.00	₹0.00	--	₹1,502,000.00	₹1,502,000.00	INVOICED
SO-00002	Feb 13, 2025	Head Office	Kevin Tan	2	₹252,000.00	₹0.00	--	₹252,000.00	₹252,000.00	PAID
SO-00001	Feb 13, 2025	Head Office	GreenTech Innovations	4	₹802,900.00	₹0.00	--	₹802,900.00	₹802,900.00	PAID

# Expense Management

Track and categorize expenses effortlessly with automation and real-time insights. Simplify documentation by uploading receipts, setting custom categories, and automating recurring expense entries.

## Features

- Receipt Upload & Scan
- Custom Categories
- Recurring Expenses
- Project-Based Expense Creation

The screenshot displays the 'Expenses' dashboard for TrueRoot Interiors. It features a search bar and filters for fiscal year, gst/non-gst, and category. A table lists several expense records with columns for Expense#, Branch Name, Title, Type, For, Final Amt., Final Amt. (INR), Date, Notes, Receipts, Status, and Actions. The table shows entries for payroll for employees Mira, Shreya Bansal, and Arpit, with amounts ranging from ₹45,161.29 to ₹600,000.00. Each entry has a status of 'paid' and a 'paid' button.

Expense#	Branch Name	Title	Type	For	Final Amt.	Final Amt. (INR)	Date	Notes	Receipts	Status	Actions
E14022025006	Head Office	Payroll For Employee Mira	Wages	Mira	₹600,000.00	₹600,000.00	May 1, 2024		Uploaded	paid	...
E14022025008	Head Office	Payroll For Employee Shreya Bansal	Wages	Shreya Bansal	₹50,000.00	₹50,000.00	Feb 1, 2024		Uploaded	paid	...
E14022025007	Head Office	Payroll For Employee Shreya Bansal	Wages	Shreya Bansal	₹45,161.29	₹45,161.29	Feb 1, 2024		Uploaded	paid	...
E14022025005	Head Office	Payroll For Employee Arpit								paid	...
E07022025002	Head Office	Payroll For Employee Sara									...
E07022025001	Head Office	Payroll For Employee Sara									...
E14022025004	Head Office	Payroll For Employee Ali Ah									...
E14022025003	Head Office	Payroll For Employee Prakh									...

The screenshot shows the 'Recurring Expenses' section, displaying a table with 3 records. The columns are Branch Name, Title, and Type. The records are for 'Purchase Of Cement' (Necessary Hardware), 'It & Network' (Necessary Software), and 'Purchase Of Hardware' (Necessary Hardware).

Branch Name	Title	Type
Head Office	Purchase Of Cement	Necessary Hardware
Head Office	It & Network	Necessary Software
Head Office	Purchase Of Hardware	Necessary Hardware

The screenshot shows the 'Add Expense' form. It includes fields for Title (Transportation), Type (Necessary Hardware), Vendor (Arpit Patel), Amount (₹9757567), Date (03 Apr 2025), and a checkbox for 'Make It Recurring'. There is also a section for 'Upload Receipts' with a drag-and-drop area. The form is partially filled out, showing 'Accounts Receivable' as the payment mode and 'online' as the mode.

# HR Suite

Manage employees, payroll, leaves, and reimbursements all in one place. Streamline recruitment processes and boost employee engagement through seamless communication and collaboration tools.

## Features

- Employee Tracking
- Payroll Management
- Leave Management
- Reimbursement Processing
- Recruitment Tracking
- Employee Connect



Employees Total 8 Record(s)

Employee #	Name ↑	Type	Role	Salary Type	Salary Amount
EN-00007	Ali Ahmed	Full Time	staff	Monthly	₹45,000.00
EN-00004	Arpit Yadav	Part Time	staff	Monthly	₹60,000.00
EN-00003	John Doe	Full Time	staff	Monthly	₹350,000.00
EN-00001	Manvi	Full Time	admin	₹0.00	
EN-00005	Mira	Full Time	staff	Monthly	₹600,000.00
EN-00008	Prakhar	Full Time	staff	Monthly	₹300,000.00
EN-00002	Sara Jones	Full Time	staff	Monthly	₹300,000.00
EN-00006	Shreya Bansal	Full Time	staff	Monthly	₹50,000.00

Add Payroll

Add Single Payroll

Add Bulk Payroll  
CSV (Comma Separated Values), Excel (XLSX), Google Sheets

Hi,  
Employee Ali Ahmed has requested for a spend/claim approval.

**Employee#:** EN-00007  
**Date:** 19/02/2025  
**Amount:** INR 3000  
**Reason:** For meeting

Approve

Reject

Cheers,  
Upbooks Team

Apply Leave

Applying for self or colleague?  
 Self  Others

Employee Name\*  
Employee Name

Details

Leave Type\*  
Leave Type

From Date\*  
From Date

Reason\*  
Please briefly describe the reason for this leave

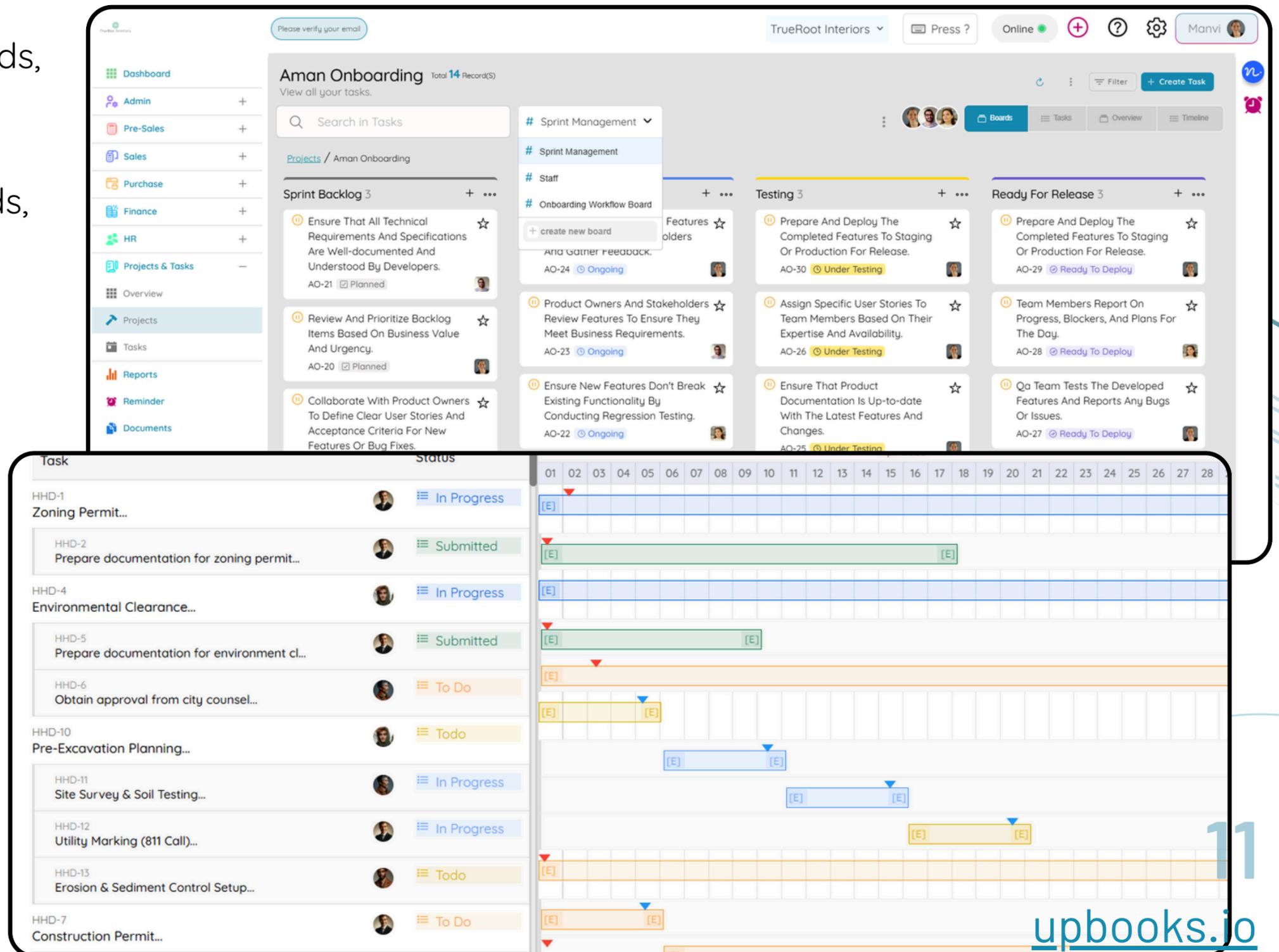
Upload Files  
Additionally upload files

# Project Management

Organize projects seamlessly with boards, workload tracking, and real-time collaboration. Customize and scale workflows using templates, custom fields, and privacy settings to suit your team's needs.

## Features

- Kanban Boards & List Views
- Workload Management
- Project Timelines
- Custom Fields
- Due Date Tracking
- Real-Time Notifications
- Board Privacy Settings
- Client & Participant Collaboration



The screenshot displays the upbooks project management interface. At the top, there's a navigation bar with a user profile "Manvi" and a "Please verify your email" notification. The main content area is titled "Aman Onboarding" and shows a "Sprint Backlog" with tasks like "Ensure That All Technical Requirements And Specifications Are Well-documented And Understood By Developers." Below this, there are four Kanban boards: "Sprint Management", "Onboarding Workflow Board", "Testing", and "Ready For Release". Each board contains tasks with status indicators (e.g., "Planned", "Ongoing", "Under Testing", "Ready To Deploy").

Below the Kanban boards, there's a "Task" list view showing tasks with IDs (HHD-1 to HHD-13) and statuses (In Progress, Submitted, To Do, Todo). To the right of the task list is a Gantt chart showing task timelines across a 28-day period. The Gantt chart uses colored bars to represent task durations and dependencies.

The interface includes a sidebar with navigation options like "Dashboard", "Admin", "Pre-Sales", "Sales", "Purchase", "Finance", "HR", "Projects & Tasks", "Overview", "Projects", "Tasks", "Reports", "Reminder", and "Documents".

# Lead & Enquiries Management

Streamline lead handling with efficient segmentation and journey mapping. Easily convert leads into clients with a single click and track inquiries effortlessly throughout the process.

## Features

- Lead Bucketing & Segmentation
- Lead Journey Mapping
- Campaign Management
- One-Click Lead Conversion
- Enquiries Tracking
- Lead Activity Management



The image displays two overlapping screenshots of the TrueRoot Interiors CRM interface. The top screenshot shows the 'Enquiries' section with a table of 8 records. The bottom screenshot shows the 'Leads' section with a table of 11 records and an 'Actions' dropdown menu.

### Enquiries Table

Enquiry#	Date	Branch Name	For	Items	Additional Notes	Status	Actions
<a href="#">ENO-00008</a>	Mar 7, 2025, 12:31 PM	Head Office	<a href="#">Aarav Kapoor</a>	HempStorage Baskets x 1 Smart Home Integration x 1		QUOTED	...
<a href="#">ENO-00007</a>	Mar 7, 2025, 12:17 PM	Head Office	<a href="#">Carlos Mendes</a>	Renovations & Remodeling x 1 DenimCanvas Wall Art x 1 PureCotton Bed Linens x 1 LeafShadow Wall Mirrors x 1		AWAITING-QUOTE	...

### Leads Table

Name	Type	Expected Revenue	Country	Contact	Priority	Status	Actions
<a href="#">Aarav Kapoor</a>	Individual	₹580,000.00	INDIA	Mr. Aarav Kapoor <a href="#">aarav@gmail.com</a>	High	CONVERTED	...
<a href="#">Blossom &amp; Brew Café</a>	Business	₹100,000.00	UNITED KINGDOM	Ms. Emily Carter 234324232 <a href="#">emily@blossombrew.com</a>	High	NEW	...
<a href="#">Greentech</a>	Business	₹20,000.00	INDIA	Ms. Sarah Doe <a href="#">greentech@info.com</a>	High	...	...
<a href="#">James Bennett</a>	Individual	₹200,000.00	JAPAN	Mr. James Bennett 234234221 <a href="#">emily@blossombrew.com</a>	High	...	...
<a href="#">Jonathan Miller</a>	Individual	₹40,000.00	ITALY	Mr. Jonathan Miller <a href="#">jonathan@info.com</a>	High	...	...
<a href="#">Marcelle Nguyen</a>	Business	\$1,500,000.00	USA	Mr. Marcelle <a href="#">marcelle@info.com</a>	High	...	...
<a href="#">Mohan Kumar</a>	Individual	₹100,000.00	INDIA	Mr. Mohan Kumar 243242342 <a href="#">mohan@info.com</a>	High	NEW	...
<a href="#">Priya Sharma</a>	Individual	₹80,000,000.00	INDIA	Mr. Priya Sharma	High	QUALIFIED	...
<a href="#">Sofia DeLuca</a>	Business	₹500,000.00	USA	Mrs. Sofia DeLuca <a href="#">deluca@info.com</a>	High	CONVERTED	...
<a href="#">UrbanTech Solutions</a>	Business	₹500,000.00	INDIA	Mr. Ali Ahmed 2323878822 <a href="#">ali@info.com</a>	Low	UNQUALIFIED	...
<a href="#">Vikram Mehta</a>	Individual	₹3,999,999.00	INDIA	Mr. Vikram Mehta <a href="#">vikram.mehta@example.com</a>	High	QUALIFIED	...

The 'Actions' dropdown menu for the leads table includes: View, Edit, Lead Activities, Create Enquiry, Create Proposal, and Convert to Customer.

# Deals & Opportunities Management

Track and close deals efficiently by managing contracts and opportunities in one unified platform. Leverage smart scoring and pipeline management to prioritize leads and monitor deal progress effectively.

## Features

- Lead & Deal Scoring
- Deal Pipeline Management
- Contract Management
- Automated Follow-Ups
- Sales Forecasting
- Collaboration & Visibility

### Add Deal

Name\*

Lead\*

Closing date

Probability

Amount

Stage\*

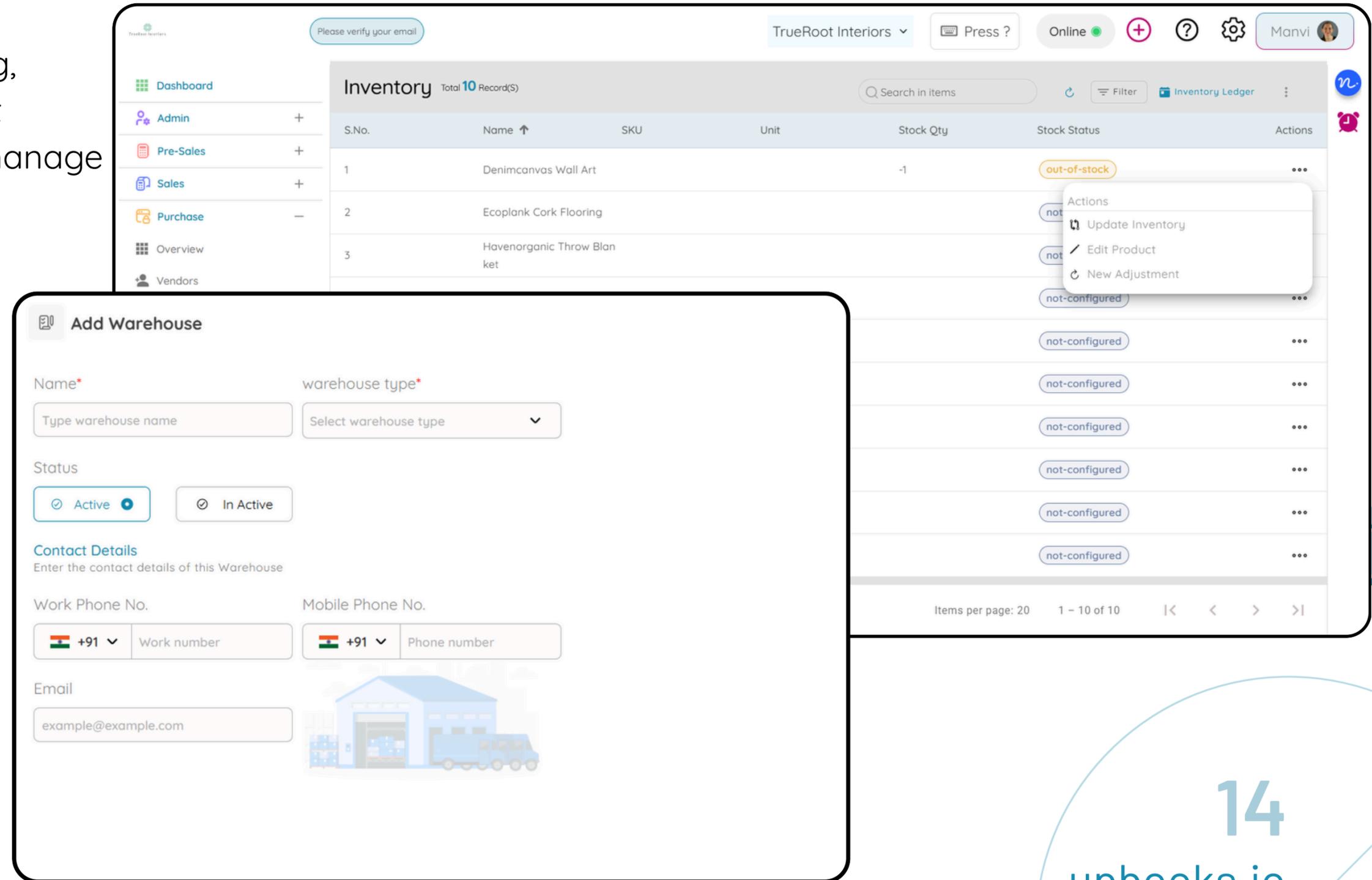
Name	Lead	Closing Date	Amount	Probability	stage
Summer Sales	<a href="#">Theresa Wanda</a>	Mar 13, 2025	₹150,000.00 /-	0.8	needs-analysis
Deal Damakka	<a href="#">Alexander Dan</a>	Apr 9, 2025	₹90,000.00 /-	0.3	negotiation
My First Lead	<a href="#">Rebecca Sally</a>	Apr 9, 2025	₹200,000.00 /-	0.8	closed-won

# Warehouse & Inventory Management

Optimize stock and warehouse operations with real-time tracking, automated updates, and efficient inventory handling. Seamlessly manage products, storage, and inventory movements.

## Features

- Stock Management
- Inventory Ledger
- Multi-Warehouse Support
- Stock Adjustment & Reconciliation
- Low Stock & Reorder Alerts
- Stock Transfers
- Purchase Order Integration
- Inventory Reports & Insights



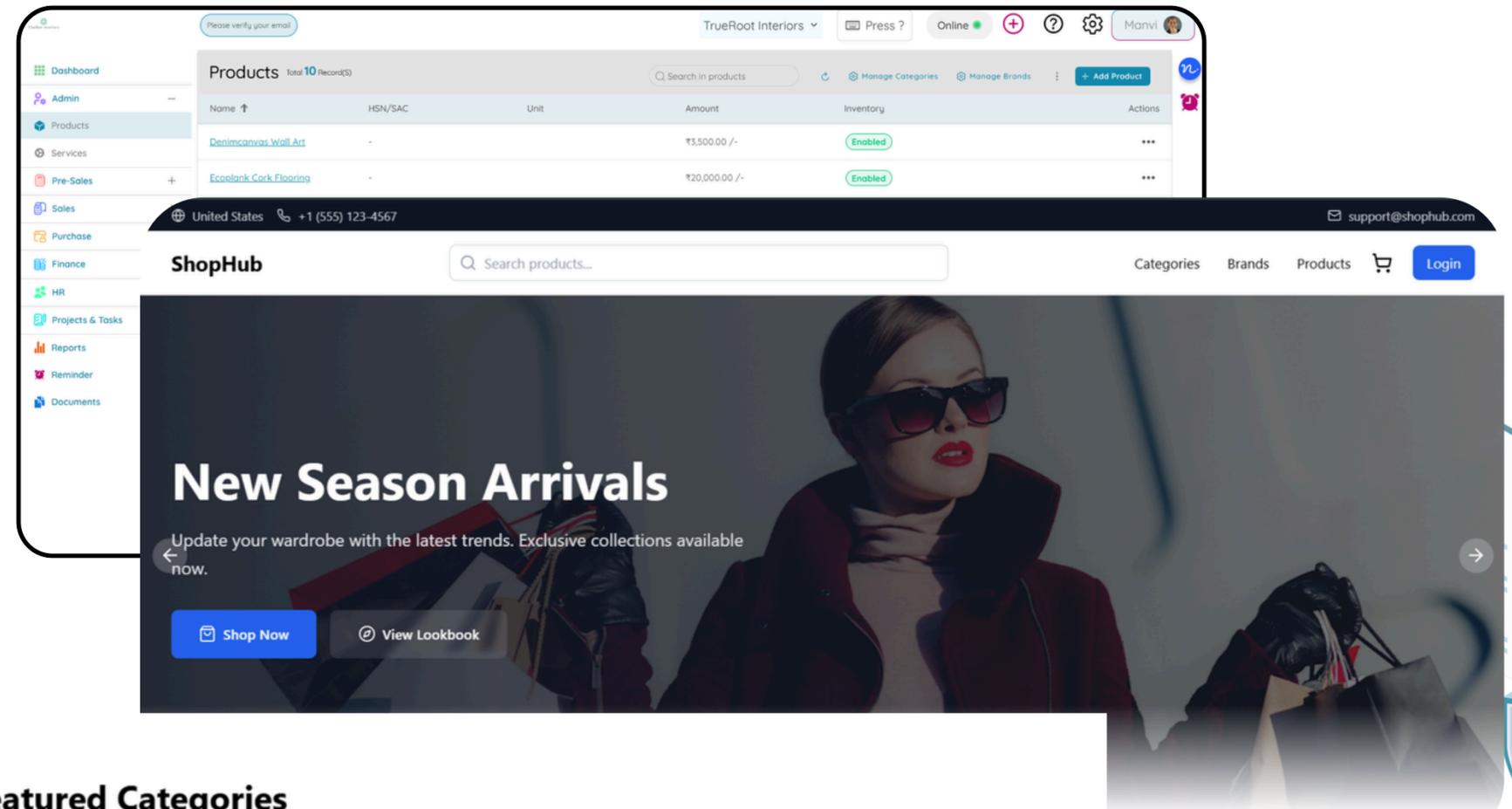
The screenshot displays the TrueRoot Interiors software interface. At the top, there's a navigation bar with 'TrueRoot Interiors', a search bar, and user information 'Manvi'. The main content area is divided into a sidebar with 'Dashboard', 'Admin', 'Pre-Sales', 'Sales', 'Purchase', 'Overview', and 'Vendors'. The central 'Inventory' section shows a table with 10 records. The first record is 'Denimcanvas Wall Art' with a stock quantity of -1 and a status of 'out-of-stock'. An 'Add Warehouse' form is overlaid on the bottom left, with fields for Name, warehouse type, Status (Active/Inactive), Contact Details (Work Phone No., Mobile Phone No., Email), and a warehouse illustration. The bottom right of the interface shows pagination controls: 'Items per page: 20', '1 - 10 of 10', and navigation arrows.

# Digital Storefronts

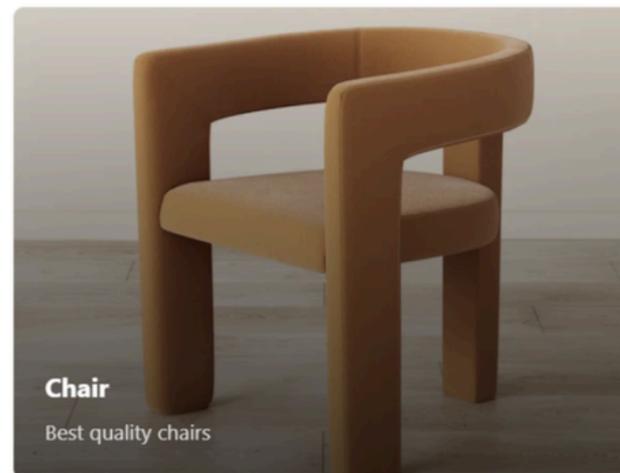
Build, manage, and scale your online business effortlessly with a powerful all-in-one solution. Tailored for both small businesses and enterprises, it ensures smooth operations from product management to payment processing.

## Features

- Effortless Store Setup & Customization
- Comprehensive Product & Inventory Management
- Seamless Order & Payment Processing
- Built-in Tax & Compliance Management



### Featured Categories



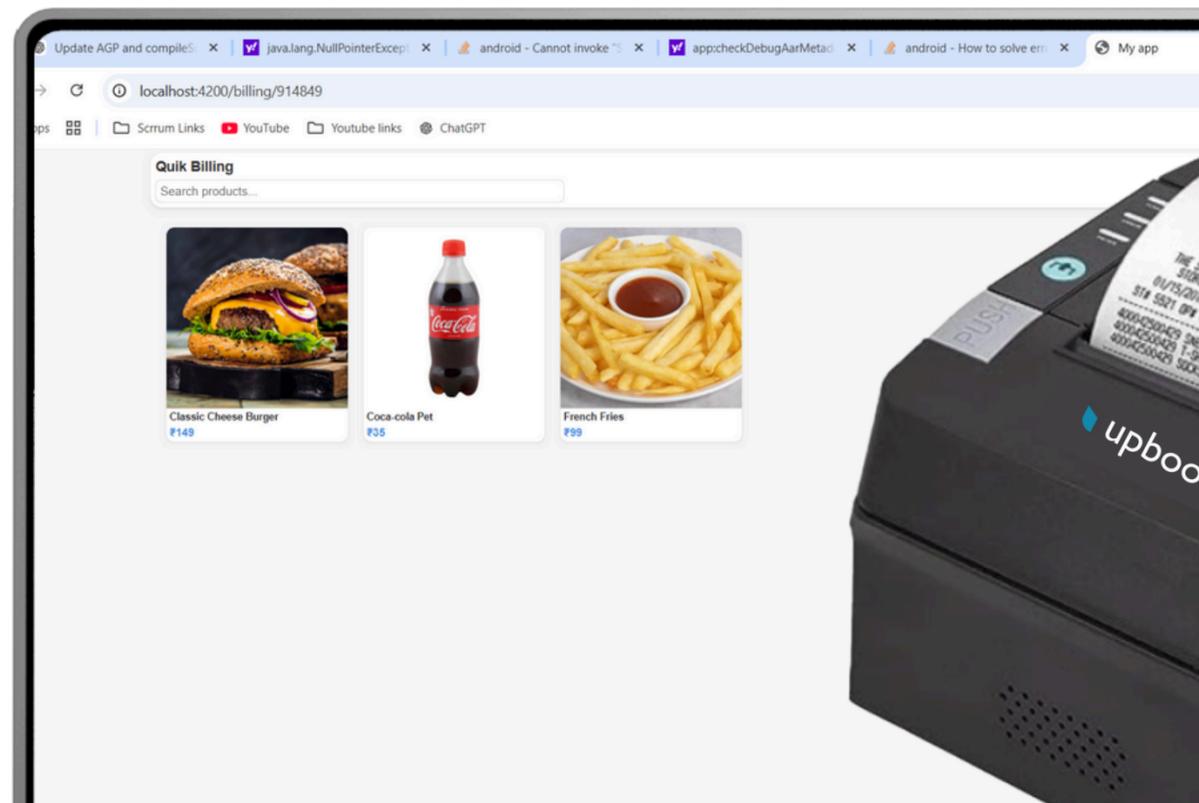
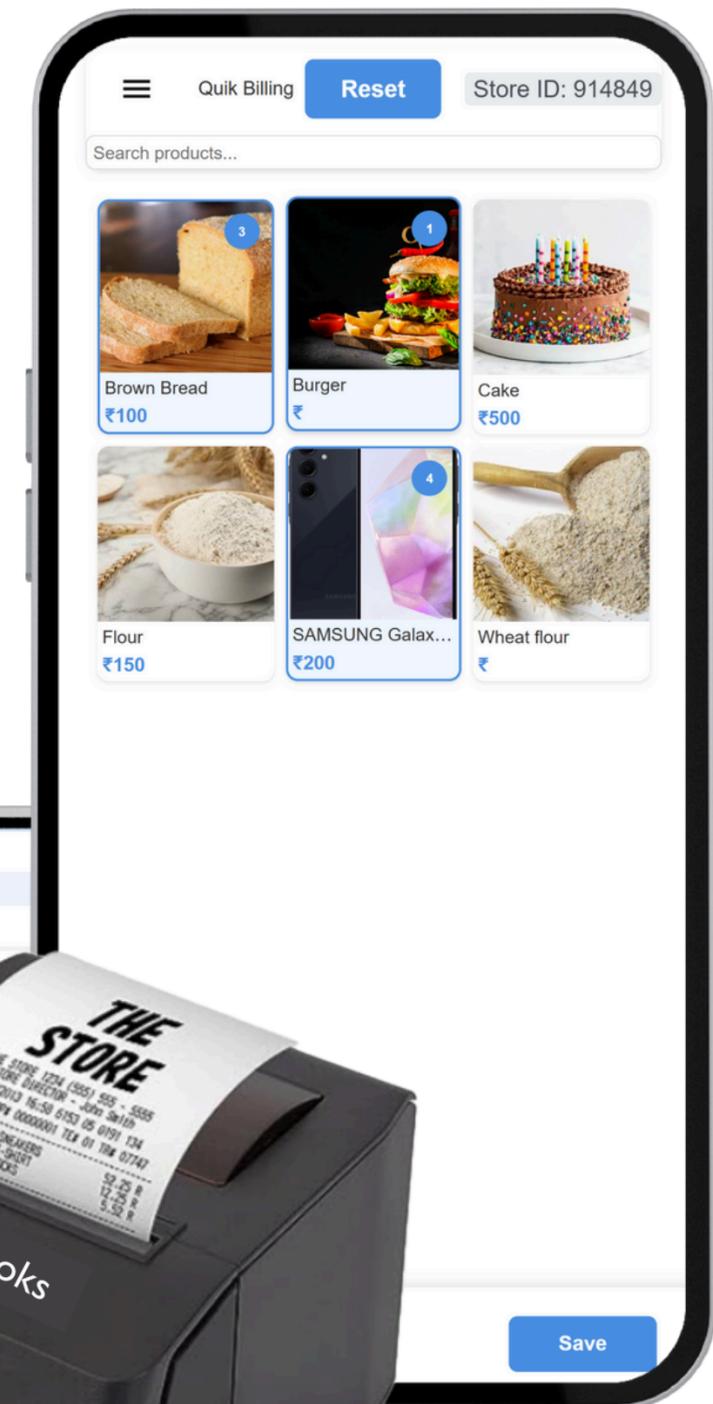
15  
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# Point of Sale App

Generate bills instantly, accept multiple payment modes, and print receipts with ease. Efficiently manage products, track sales trends, and gain valuable insights through real-time reporting.

## Features

- Instant Billing
- Thermal Printing Support
- Multiple Payment Modes
- Customer-Centric Checkout
- Smart Sales Reports
- Quick Product Search
- Faster Transactions



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# Industries it helps

## IT



upbooks streamlines project finances, ensuring accurate billing and expenses tracking, boosting profitability.

## Retail



upbooks optimizes inventory, sales tracking, and invoicing, enhancing customer experience and revenue.

## Manufacturing



upbooks simplifies e-commerce operations, managing sales, payments, and financial insights for growth.

## Accounting



upbooks automates financial tasks, aiding compliance, precise reporting, and strategic planning.

## Construction



upbooks enhances by integrating budgeting, timelines, resource allocation, compliance tracking, and real-time collaboration for seamless execution..

## E-commerce



upbooks monitors production costs, manages inventory, and automates payroll, enhancing efficiency and informed decision-making.



# USP (unique selling point)



## Get Started in Minutes

No steep learning curves or complex setups. Onboard your team in under 5 minutes—seriously.

## Built for Simplicity

Designed for non-tech teams. If you can use email, you can use Upbooks.

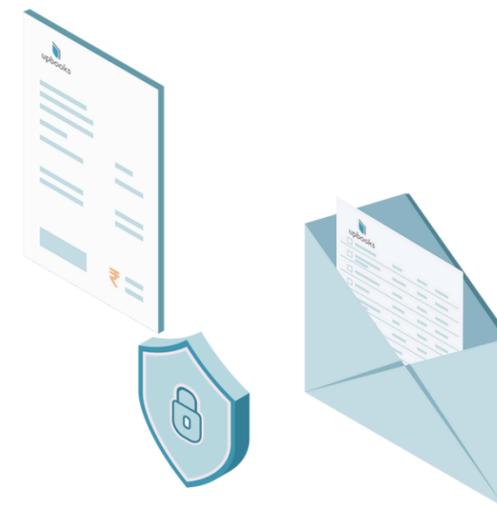


## Plays Well with Others

Seamlessly integrates with 5000+ apps via Zapier. Upbooks fits right in with your existing workflow.

## Customizable to the Core

Tailor workflows, fields, and settings to match exactly how your business operates.



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# USP (unique selling point)

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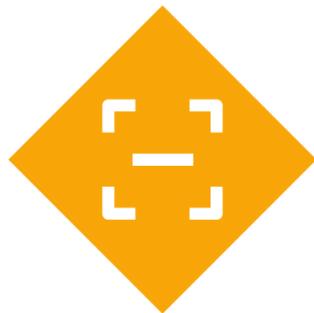


## Budget-Friendly, Founder-Approved

Powerful business tools at a fraction of the cost. Keep your burn low while staying on top of everything.

## All-in-One, Yet Lightweight

From finance to operations, Upbooks covers it all—without the bloat of traditional ERPs.



## Everything Where You Need It

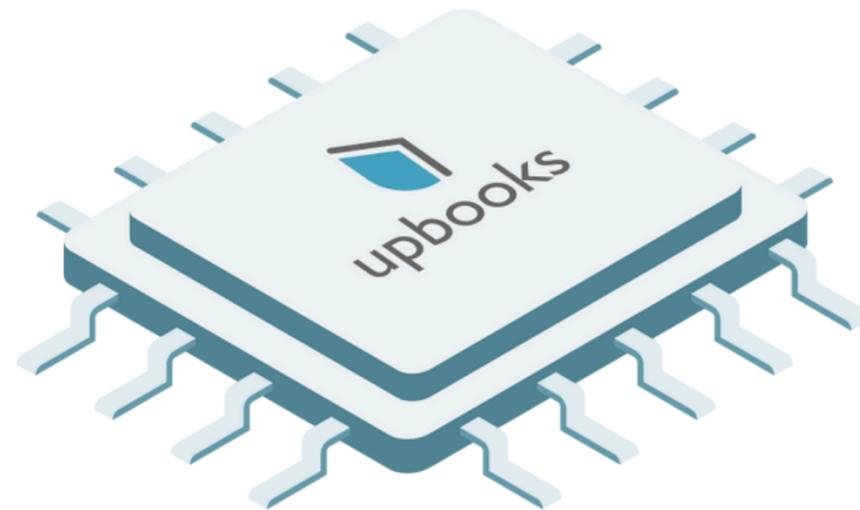
No more tab-hopping. All your tools, data, and insights in one beautifully organized dashboard.

## Grows With You

Whether you're a team of 2 or 200, Upbooks scales effortlessly as your business evolves.



"AI embedded tech  
Your Ultimate Business  
Management Tool!"



# Embedded AI technology

## Scan your documents

Effortlessly upload documents, and watch as our AI-powered scanner extracts essential data swiftly and accurately.

## Recognize data

Experience the power of AI recognizing and interpreting complex financial data, allowing you to focus on strategic decisions instead of mundane tasks.



## Automate the process

Say goodbye to manual data entry. Our AI automates tasks, saving time and reducing errors in your financial management.

# Integrations

## Razorpay

Integrate upbooks with Razorpay for secure and efficient online payments. Enable clients to settle invoices swiftly using various payment options, enhancing cash flow and business efficiency.



## Sendgrid

upbooks integrates with SendGrid to enhance communication. Automate email notifications, invoice deliveries, and reminders, ensuring effective client communication and streamlined financial operations.

## Zapier

Integrate upbooks with Zapier for unmatched workflow automation. Effortlessly connect upbooks with thousands of other apps, automating tasks and ensuring seamless data transfer, ultimately boosting productivity and efficiency.



## Whatsapp

Seamlessly connect upbooks with WhatsApp to streamline communication. Send invoices, payment reminders, and updates directly to clients, enhancing client engagement and convenience.

# Pricing plans

## Basic

- Sales & Invoicing System ✓
- Vendors & Purchase Orders ✓
- Expense Management Tools ✓
- Finance & Accounting Suite ✓
- Centralized Documents Repository ✓
- Advanced Reports & Reminders ✓
- 2 GB Storage Included ✓

\$ **12** /mo

## Startup

- All Basic Features ✓
- Leads & Enquiries Management ✓
- Inventory Management Suite ✓
- HR & Payroll Features ✓
- Projects & Tasks Handling ✓
- Dynamic Dashboards & Reports ✓
- 2 Branches, 1 Warehouse ✓
- 5 GB Storage Included ✓

\$ **24** /mo

## Growth

- All Startup Features ✓
- Unlimited Clients & Vendors ✓
- Unlimited Leads & Employees ✓
- Unlimited Branches & Warehouses ✓
- Manage Deals & Contracts ✓
- Employee Spends & Reimbursements ✓
- 10 GB Storage Included ✓
- Email Rules & Tracking ✓

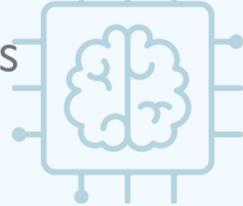
\$ **36** /mo

\*Additional user license will cost \$9 per active user per month

# Future improvement

## AI-Driven Insights

upbooks could harness the power of Artificial Intelligence (AI) to provide even more valuable insights into business financials.



## Blockchain Integration

With the rise of blockchain technology, upbooks could explore incorporating blockchain into its platform for enhanced security and transparency.



## Smart Contract Management

upbooks might introduce smart contract functionality, enabling businesses to automate financial agreements and transactions.



## Partnerships and Integrations

upbooks could forge strategic partnerships with other complementary software providers, enabling seamless integration with a wider range of business tools.



# Supercharge Your Sales Process

## Why Businesses Trust Upbooks for Sales Management?

- One-Click Proposal to Sales Order Conversion – No manual work, just instant transitions.
- Smart Invoicing & Recurring Billing – Automate invoices and get paid on time
- Seamless Payment Collection – Accept UPI, cards, cash, or split payments effortlessly.
- Real-Time Tracking & Alerts – Stay informed at every step with instant updates.
- Turn Enquiries into revenue faster—Upbooks makes sales management effortless!



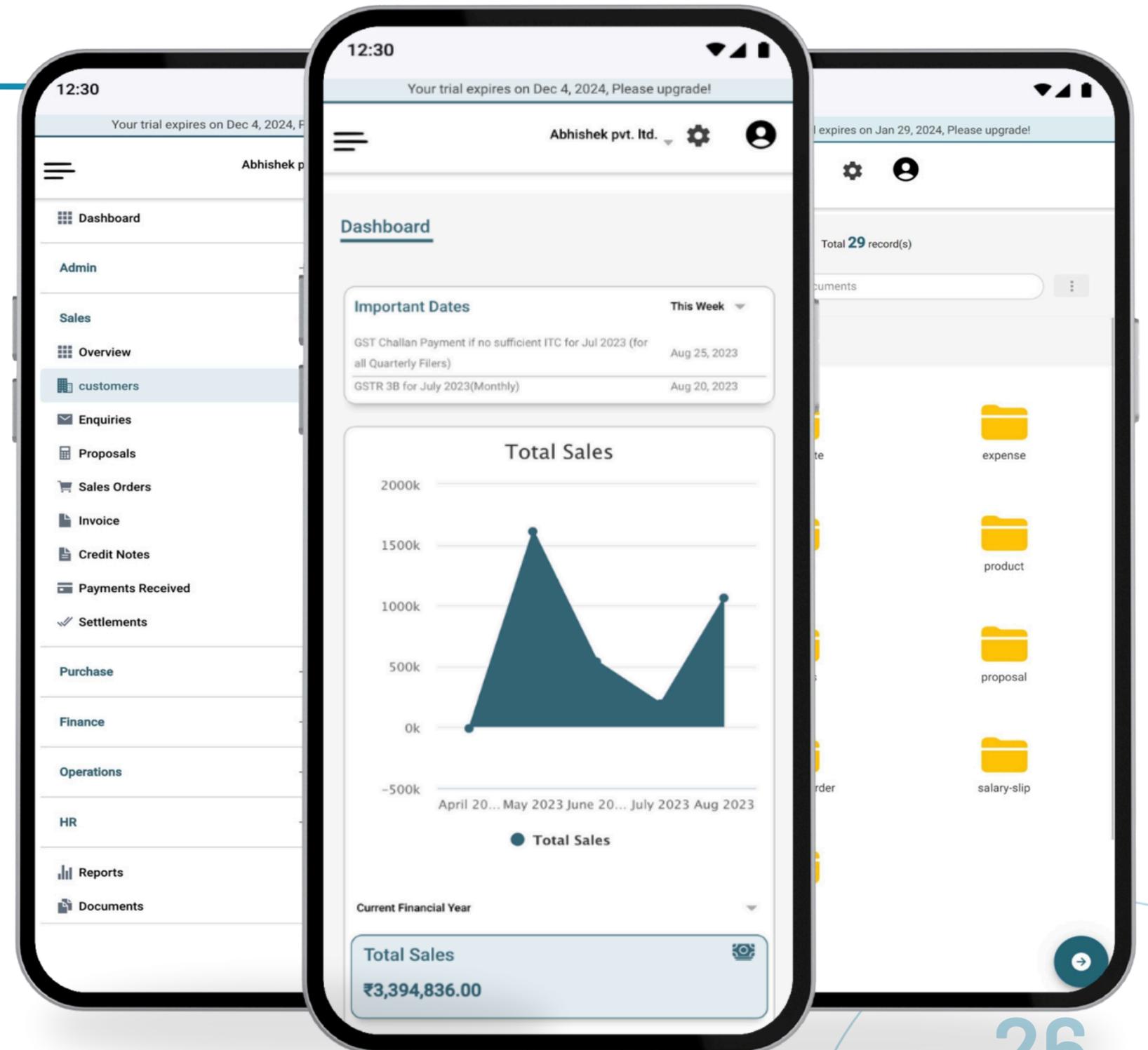
Proposals#	Date	Branch	For	Items(s)	Total Amt.	Tax Amt.	Discount Amt.	Final Amt.	Final Amt. (INR)	Status	Actions
PRN-00014	Apr 1, 2025	Head Office	Arvind Patel	2	₹2,500.00	₹0.00	--	₹2,500.00	₹2,500.00	ORDERED	...
PRN-00013	Mar 10, 2025	Head Office	Marcelle Nguyen	4	₹822,000.00	₹0.00	--	₹822,000.00	₹822,000.00	CONFIRMED	...
PRN-00012	Mar 7, 2025	Head Office	Aarav Kapoor	2	₹250,500.00	₹0.00	--	₹250,500.00	₹250,500.00	CONFIRMED	...
PRN-00011	Mar 7, 2025	Head Office	Aarav Kapoor	3	₹1,704,700.00	₹0.00	--	₹1,704,700.00	₹1,704,700.00	ORDERED	...
PRN-00010	Feb 13, 2025	Head Office	Brooks & Associates Consulting	2	₹1,502,000.00	₹0.00	--	₹1,502,000.00	₹1,502,000.00	ORDERED	...
PRN-00009	Feb 13, 2025	Head Office	John Mitchell Resturant	3	₹42,000.00	₹0.00	--	₹42,000.00	₹42,000.00	CONFIRMED	...
PRN-00008	Feb 13, 2025	Head Office	Vikram Mehta	2	₹23,500.00	₹0.00	--	₹23,500.00	₹23,500.00	CONFIRMED	...
PRN-00007	Feb 13, 2025	Head Office	TechVision Solutions	3	₹1,505,500.00	₹0.00	--	₹1,505,500.00	₹1,505,500.00	ORDERED	...
PRN-00006	Feb 13, 2025	Head Office	Kevin Tan	2	₹252,000.00	₹0.00	--	₹252,000.00	₹252,000.00	ORDERED	...
PRN-00005	Feb 13, 2025	Head Office	Vikram Mehta	2	₹3,000,900.00	₹0.00	--	₹3,000,900.00	₹3,000,900.00	CONFIRMED	...
PRN-00004	Feb 13, 2025	Head Office	Sofia DeLuca	3	₹3,005,500.00	₹0.00	--	₹3,005,500.00	₹3,005,500.00	CONFIRMED	...
PRN-00003	Feb 13, 2025	Head Office	Carlos Mendes	5	₹1,055,500.00	₹0.00	--	₹1,055,500.00	₹1,055,500.00	ORDERED	...

[click here](#) to learn more about Customers & Sales Management by Upbooks

# Upbooks App

## Check our app on stores

With the upbooks mobile app, you can effortlessly stay on top of your business while on the go. Whether you're an entrepreneur, a small business owner, or a busy professional, our user-friendly app offers a seamless experience to help you streamline financial and other operations and make informed decisions.

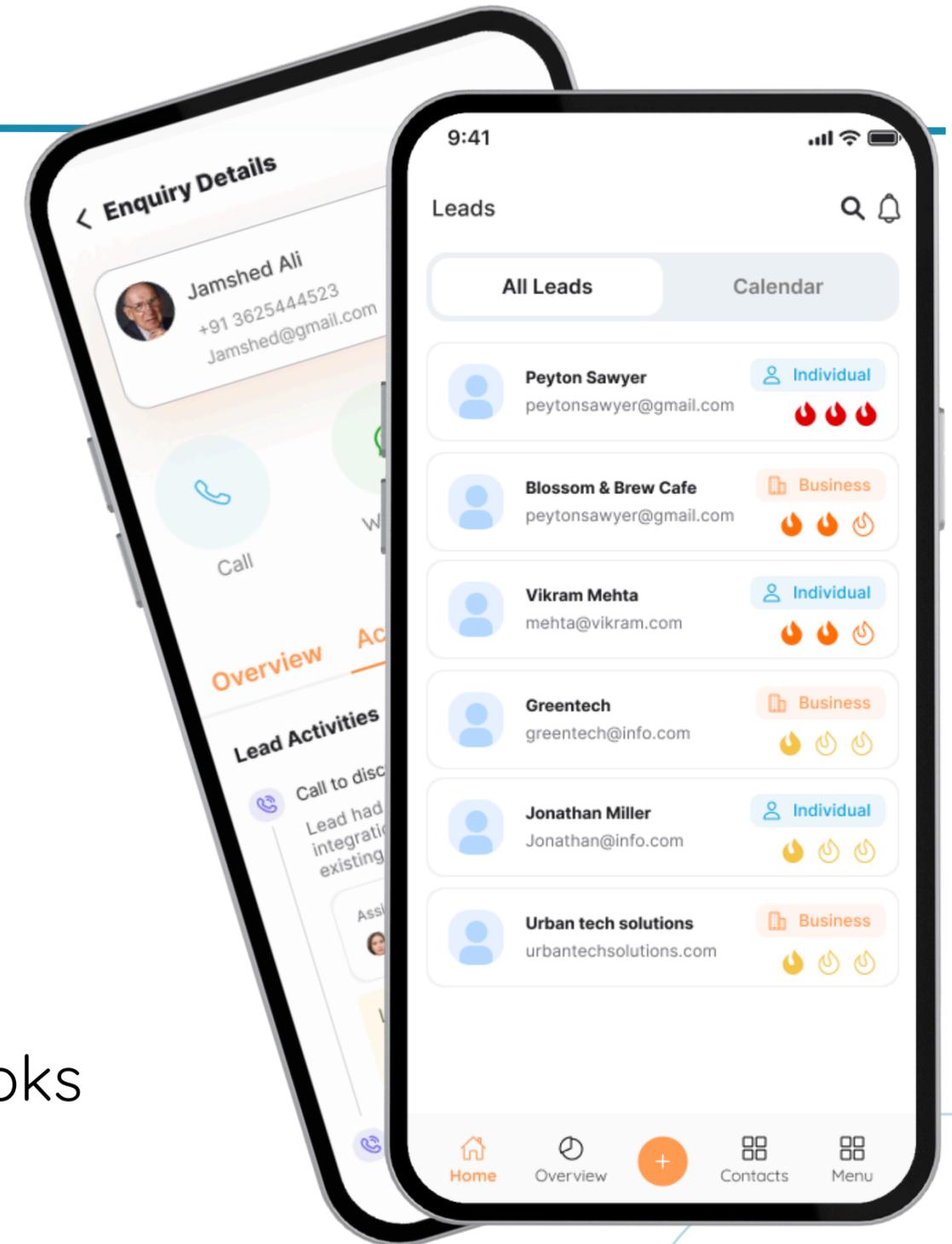


# More apps from Upbooks

## Lead Tracker By Upbooks

Introducing the Upbooks Lead Tracker App – your ultimate solution for seamless lead management. Capture and nurture leads effortlessly with targeted campaign creation, ensuring maximum engagement. Automatically segment leads for personalized follow-ups and track every interaction in real time. Generate inquiries and proposals directly within the system, streamlining the sales process. Stay organized with detailed lead activity tracking, ensuring timely follow-ups and higher conversion rates.

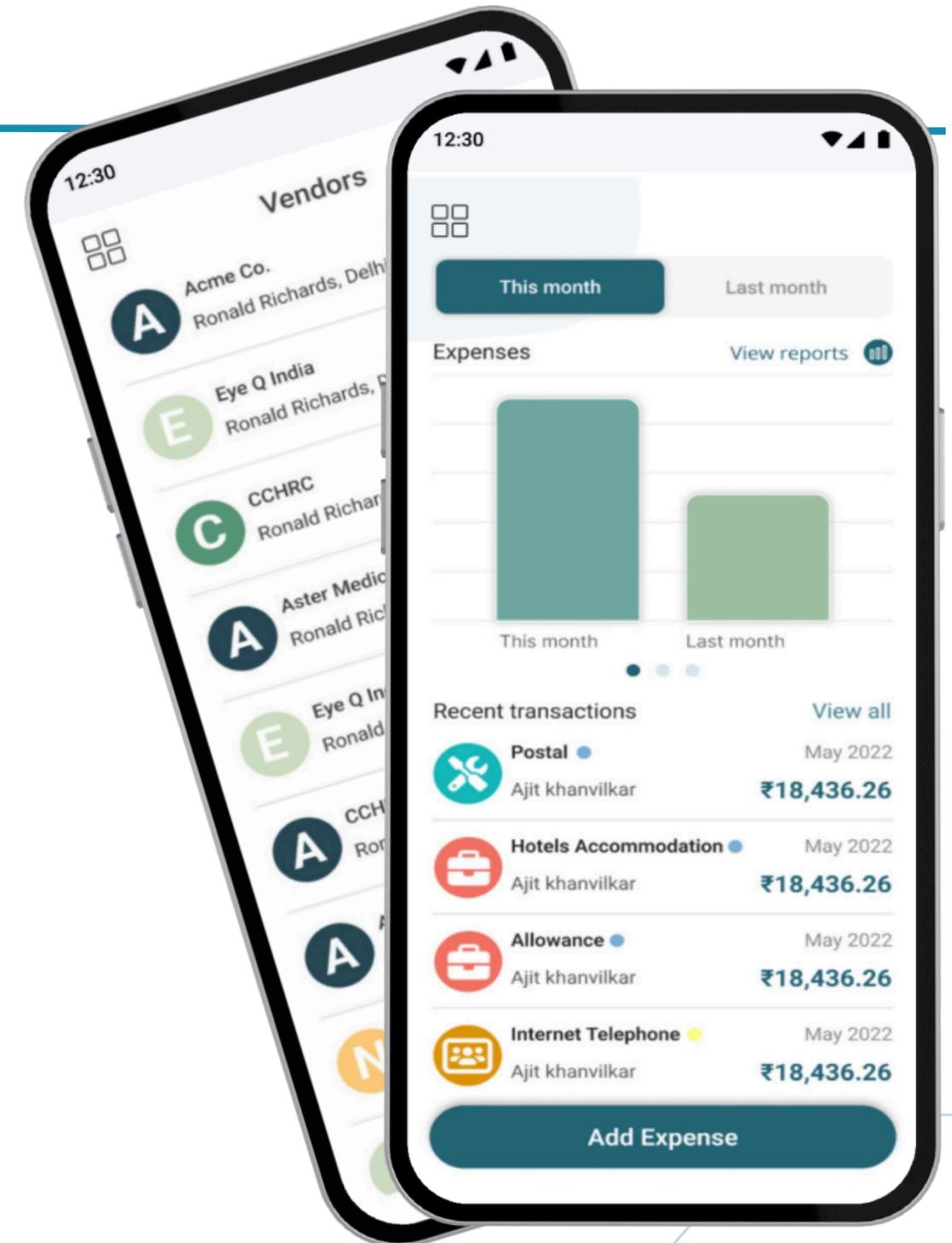
[click here](#) to learn more about Lead Tracker by Upbooks



# More apps from Upbooks

## Upbooks - Expense Tracker

Introducing the Upbooks Expense Tracker App - your ultimate solution for efficient expense management. The app's AI scan feature revolutionizes expense tracking by extracting data directly from receipts, eliminating manual input. Record expenses effortlessly, categorize them, and attach scanned receipts for accuracy. Enjoy a comprehensive overview of your financial outflows, and efficiently manage vendors to streamline procurement processes. The app simplifies financial record-keeping, enhancing business efficiency and expense control.



[click here](#) to learn more about Vendors & Purchase Management by Upbooks



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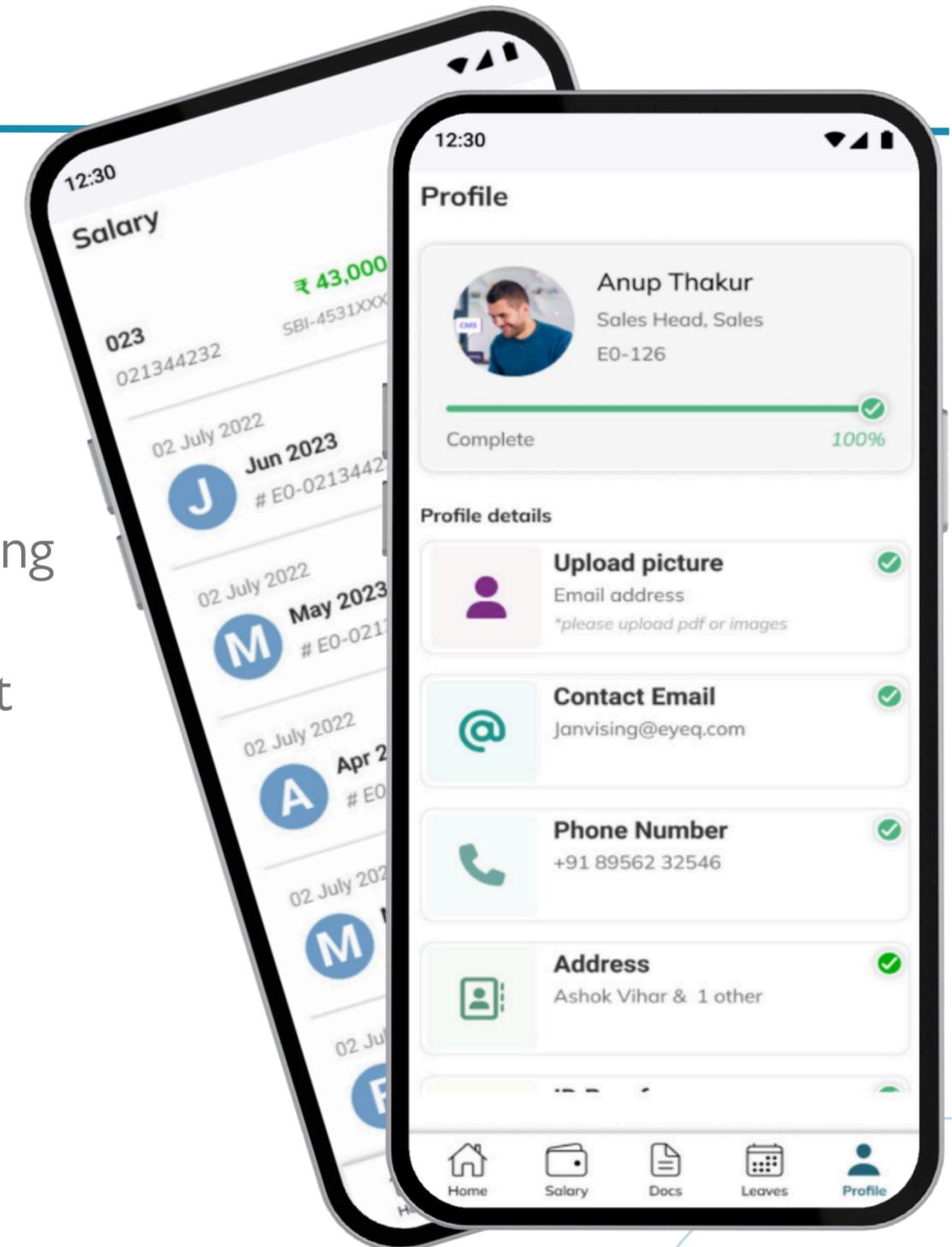
# More apps from Upbooks

## Upbooks - Employee Connect

Experience effortless HR management with the upbooks Employee App. Simplify employee details management by allowing seamless uploading of documents, enhanced by an AI scan feature that efficiently retrieves essential data. Access salary slips on-the-go, giving employees real-time insights into their earnings. Submit and track leave requests with ease, fostering a streamlined leave management process. App also allows to manage claims & reimbursements. The app ensures data security while boosting employee engagement by providing them direct access to their essential information.



[click here](#) to learn more about HRMS by Upbooks



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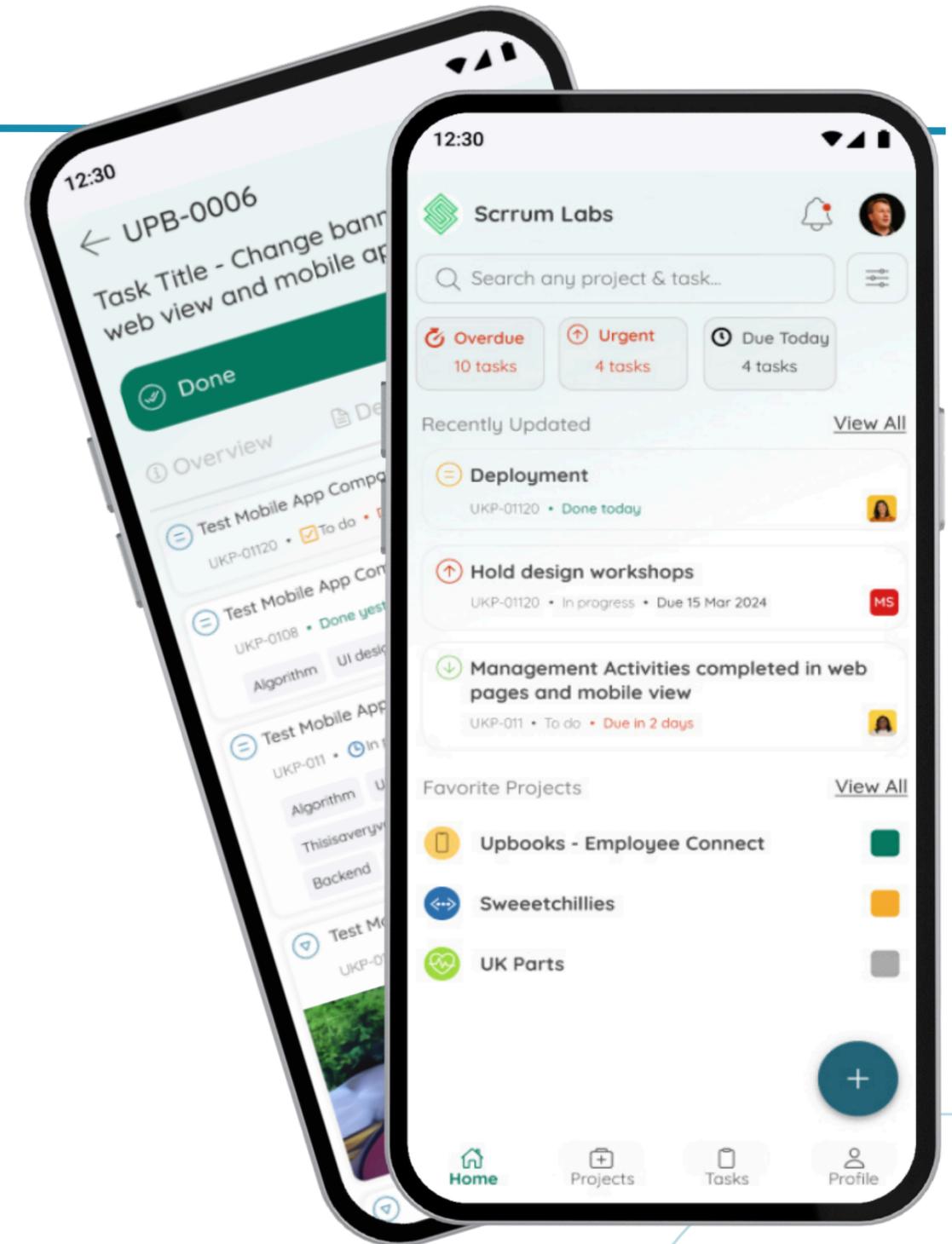
# More apps from Upbooks

## Upbooks - Project Management

Upbook's project management app empowers teams with seamless collaboration and efficient task management. From planning to execution, upbook streamlines workflows, ensuring deadlines are met and projects stay on track. With intuitive features like resource allocation, and real-time updates, upbook enhances productivity and drives project success. Experience a new level of project management with upbook.



[click here](#) to learn more about Boards by Upbooks



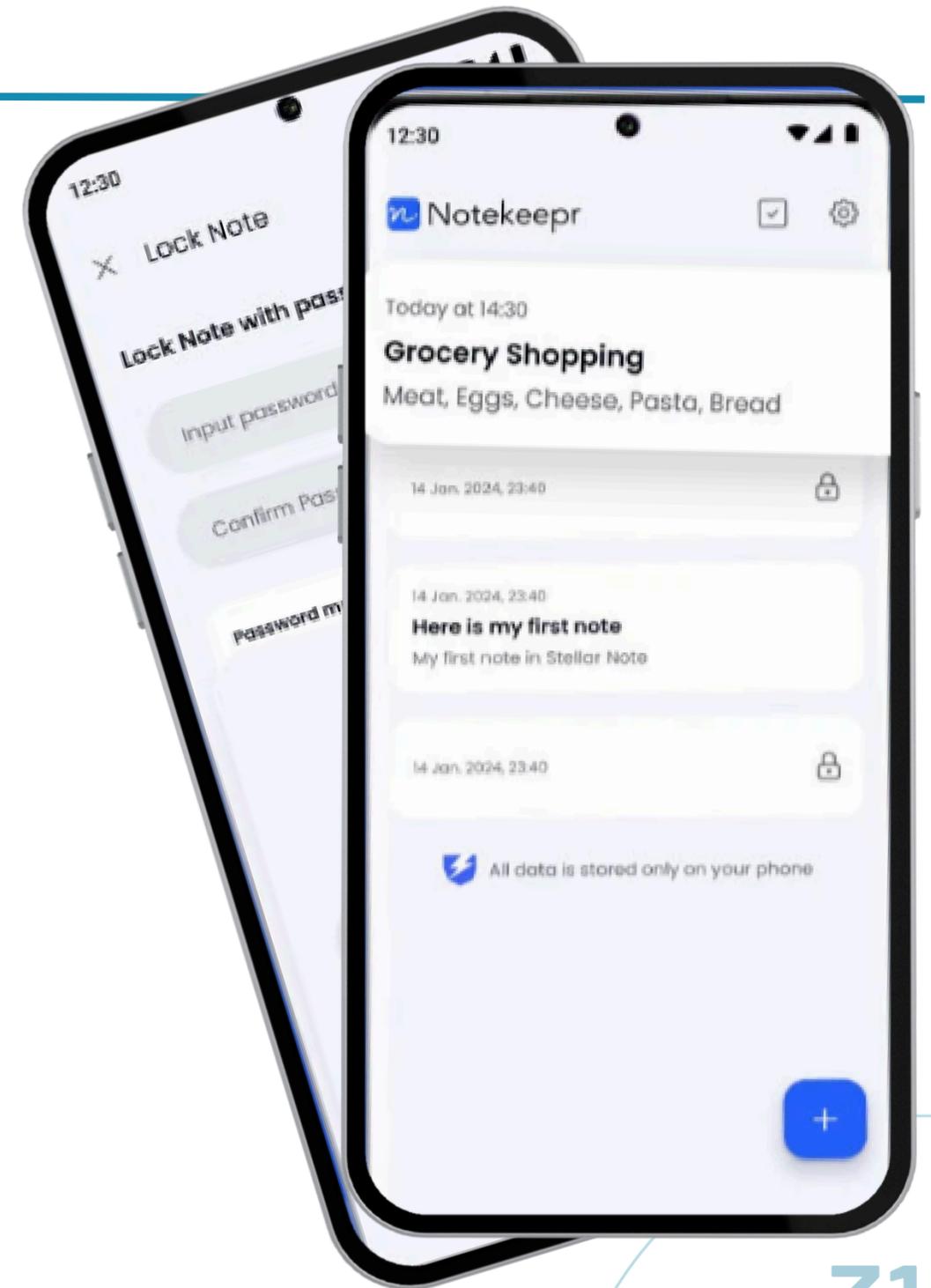
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# More apps from Upbooks

## Notekeepr by upbooks

Notekeepr by upbook is a sleek, user-friendly app for on-the-go note-taking. With seamless integration into the upbook tool, it offers secure note storage with password protection. Its elegant design and simplicity make it ideal for efficient and professional note management.

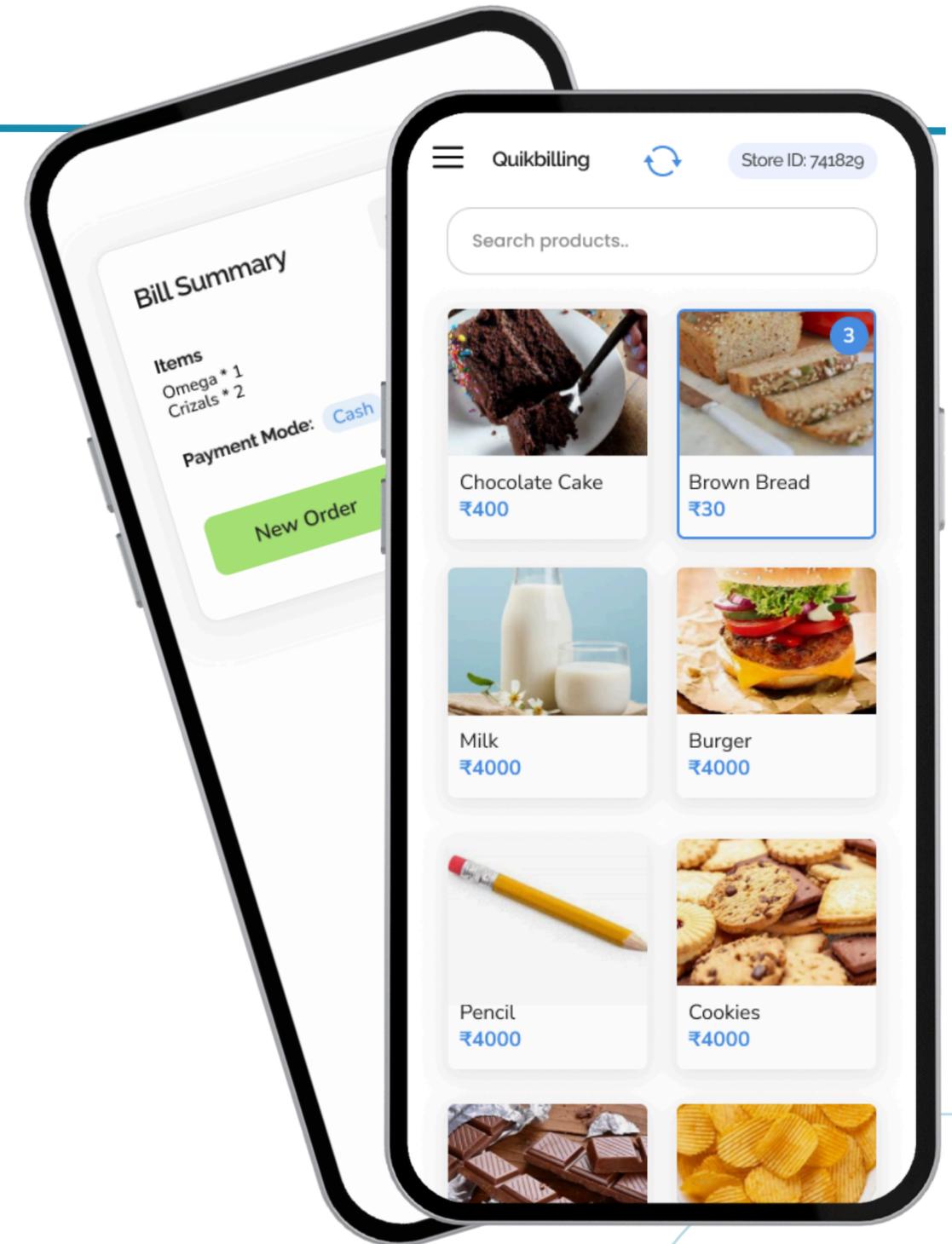


# More apps from Upbooks

## Quikbilling by upbooks

Introducing the Upbooks QuikBilling App – a fast and efficient POS solution designed for seamless retail transactions. With an integrated thermal printer, businesses can instantly generate invoices and receipts with a single click. Effortlessly add products, create sales orders, and process payments via cash, card, or UPI. Every transaction is automatically recorded in Upbooks, ensuring accurate financial tracking. Access detailed sales reports to monitor performance, manage inventory, and streamline daily operations with ease.

[click here](#) to learn more about QuikBilling by Upbooks

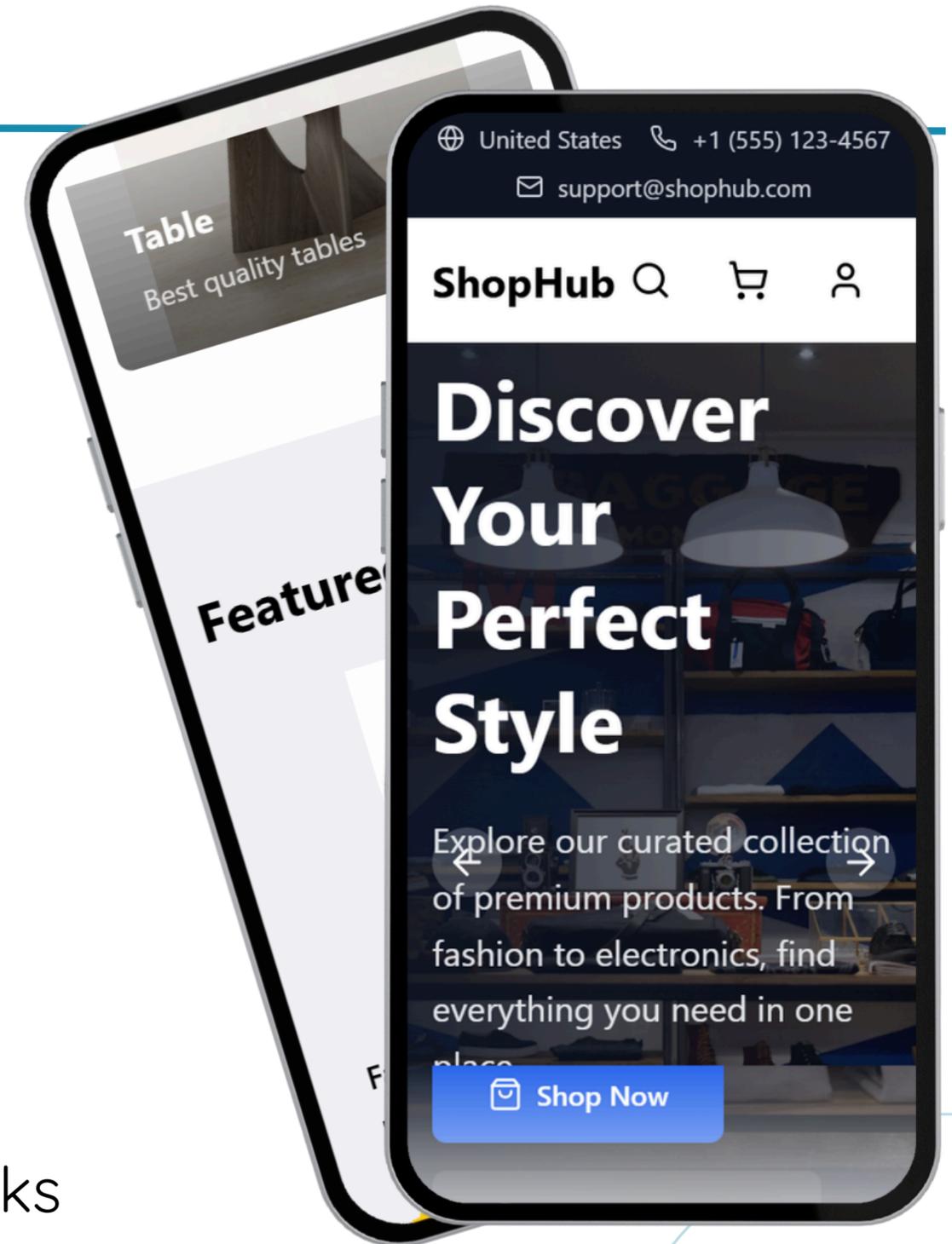


# More apps from Upbooks

## Ecommerce by upbooks

In an era where digital commerce is evolving rapidly, staying ahead requires more than just an online store. Upbooks Ecommerce equips businesses with smart automation, seamless integrations, and powerful analytics to drive growth. Whether you're managing high-volume orders, streamlining inventory, or enhancing customer engagement, our platform ensures efficiency at every step. Say goodbye to fragmented systems and hello to a unified, scalable solution designed for long-term success.

[click here](#) to learn more about Ecommerce by Upbooks



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# Conclusion

In conclusion, upbooks stands as a game-changing solution that transcends industry boundaries, transforming financial and business management for businesses worldwide. With features ranging from seamless online invoicing to AI-powered expense tracking, upbooks empowers entrepreneurs, startups, and established enterprises to optimize operations, enhance financial transparency, and make informed decisions. By offering a user-friendly interface and integration with various systems, upbooks paves the way for growth, efficiency, and success across diverse sectors. With a commitment to innovation, security, and excellence, upbooks is your trusted partner in shaping a brighter financial future and realizing the full potential of your business.



# A product of Scrrum Labs

Former Registration as **Scrrum Labs** "Proprietorship" since **1st April 2019**

Current Registration as **Scrrum Labs Private Limited** since **4th May 2022**

**CIN:** U72900DL2022PTC397780

**Employee Count:** 28

**Director & Head of Technology:** Rahul Vohra

**PAN:** ABICS4338R

**GSTIN:** 07ABICS4338R1ZK

**UDYAM:** UDYAM-DL-01-0018952

For more information, please visit our website [www.scrrum.com](http://www.scrrum.com)

Contact: [hello@scrrum.com](mailto:hello@scrrum.com)

 **upbooks**



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# THANK YOU

## Contact Us

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