



Welcome to Boards by Upbooks

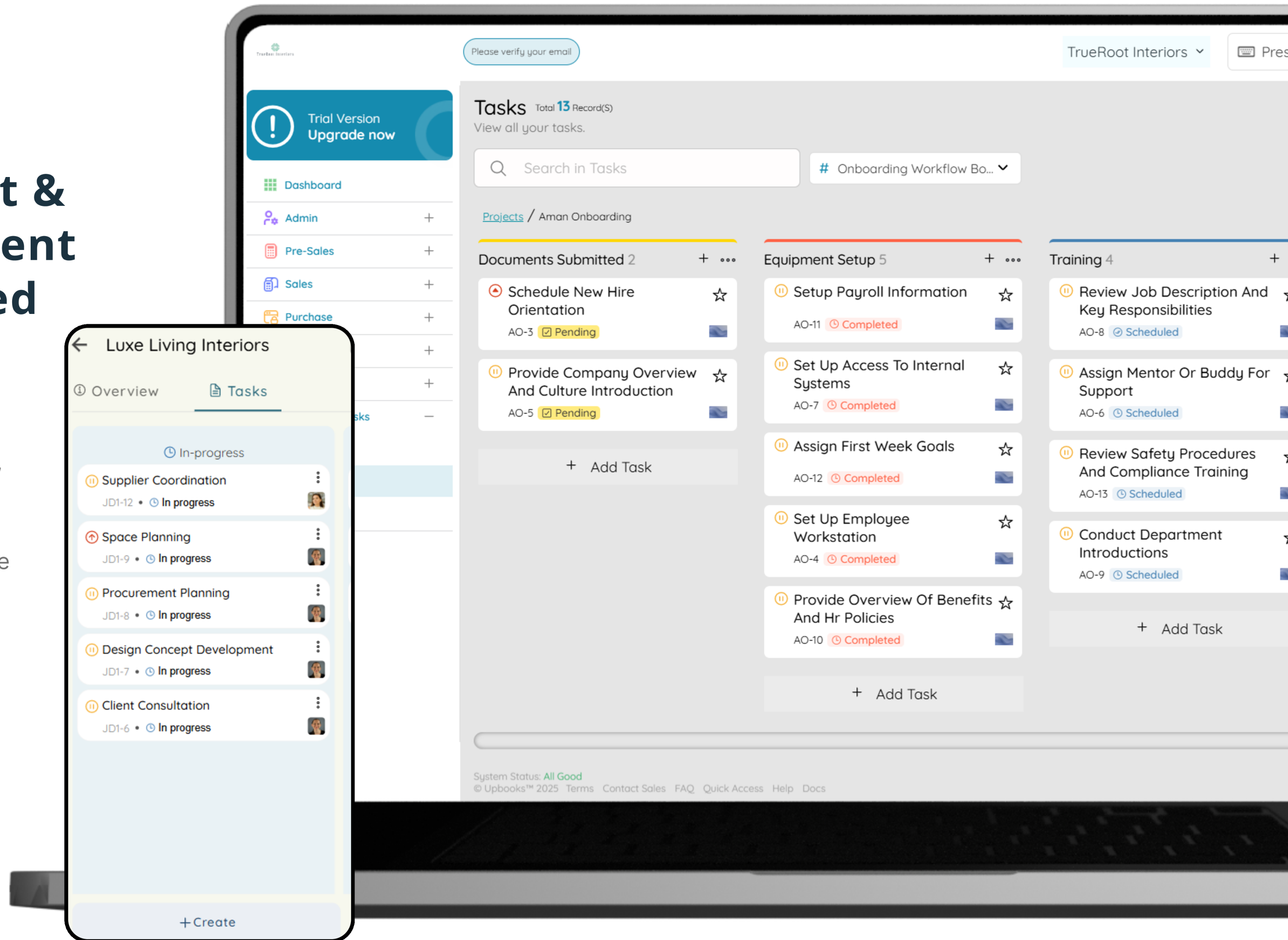
Transform How You Track and
Manage Operations, Finance, Strategy, and More.



Simplify Project & Task Management with Unmatched Flexibility

Seamlessly manage projects, track financials, oversee operations, and implement strategic initiatives—all in one place.

With flexible templates, task management, and real-time collaboration, Board by Upbooks adapts to every department.



Why Board by Upbooks?

01

Cross-Departmental Power

Manage all your business functions—operations, finance, and strategy—in one platform.

02

Customizable Columns & Statuses

Add, rename, or remove columns, and define custom statuses to reflect task progress.

03

Real-Time Insights

Get live, actionable updates across all business areas.

04

Multiple Boards per Project

Create multiple boards within a single project, using different templates for distinct workflows.

05

Board Privacy Settings

Control access and visibility with board-specific privacy options.

06

Custom Field Options

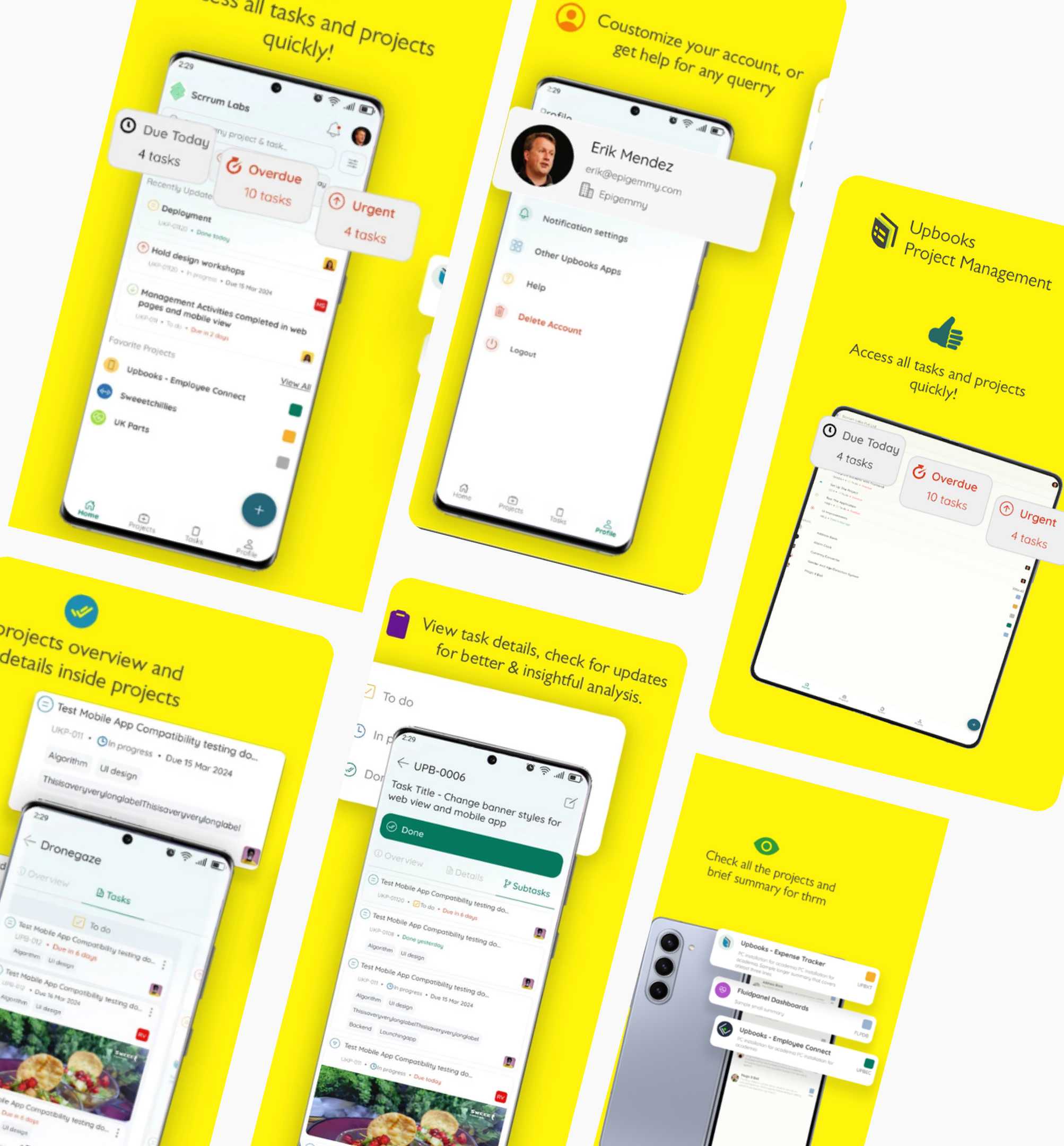
Add dropdowns, text boxes, numbers, or checkboxes to capture exactly what you need.



Upbooks - Project Management App

The All-in-One Solution for Your Business Needs

Upbooks is your all-in-one solution for efficient project management and task tracking. Seamlessly organize projects, prioritize tasks, and collaborate with team members, whether you're in the office or on-the-go.





Track Operations with Precision

- Comprehensive Operations Management: Manage day-to-day operational tasks, resource allocations, and progress updates effortlessly.
- Customizable Operations Templates: Use predefined templates to ensure every operational task is aligned with your goals.

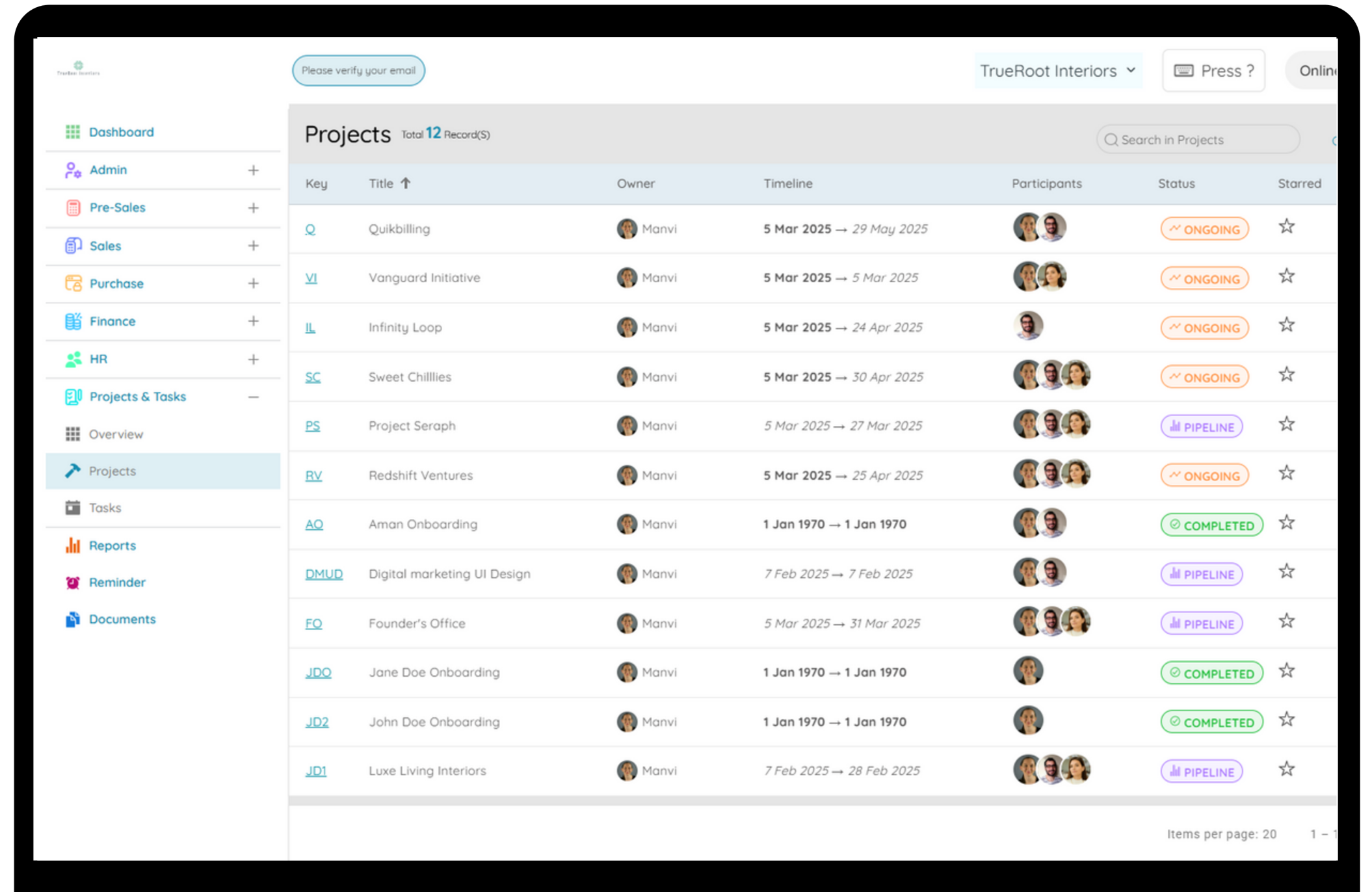
Purchase Furniture And Fixtures
0-4 In Progress

The screenshot displays the upbooks web application interface. At the top, there's a navigation bar with the upbooks logo, a "Please verify your email" button, and the user name "BioStream Solutions". A sidebar on the left contains a menu with options like Dashboard, Admin, Pre-Sales, Sales, Purchase, Finance, HR, Projects & Tasks, and Overview. The main area shows a Kanban board for a project named "Software Development Board". The board has three columns: "Backlog 2", "In Progress 2", and "Done 3". The "In Progress" column contains the task "Purchase Furniture And Fixtures" (ID 0-4, In Progress status). A modal window is open for editing this task, showing details such as Status (To Do), Priority (Medium), Due Date, Assignee (Manvi), Reporter (Manvi), and Attachments. The modal also includes a section for Comments.



Seamless Project Creation and Ownership

- *Project Owner:* The project creator is designated as the owner, with exclusive rights to edit or delete the project.
- *Budget & Templates:* Set project budgets, choose from pre-configured templates, and customize them to fit your needs.
- *Client & Participants:* Easily add clients and participants for smooth collaboration.

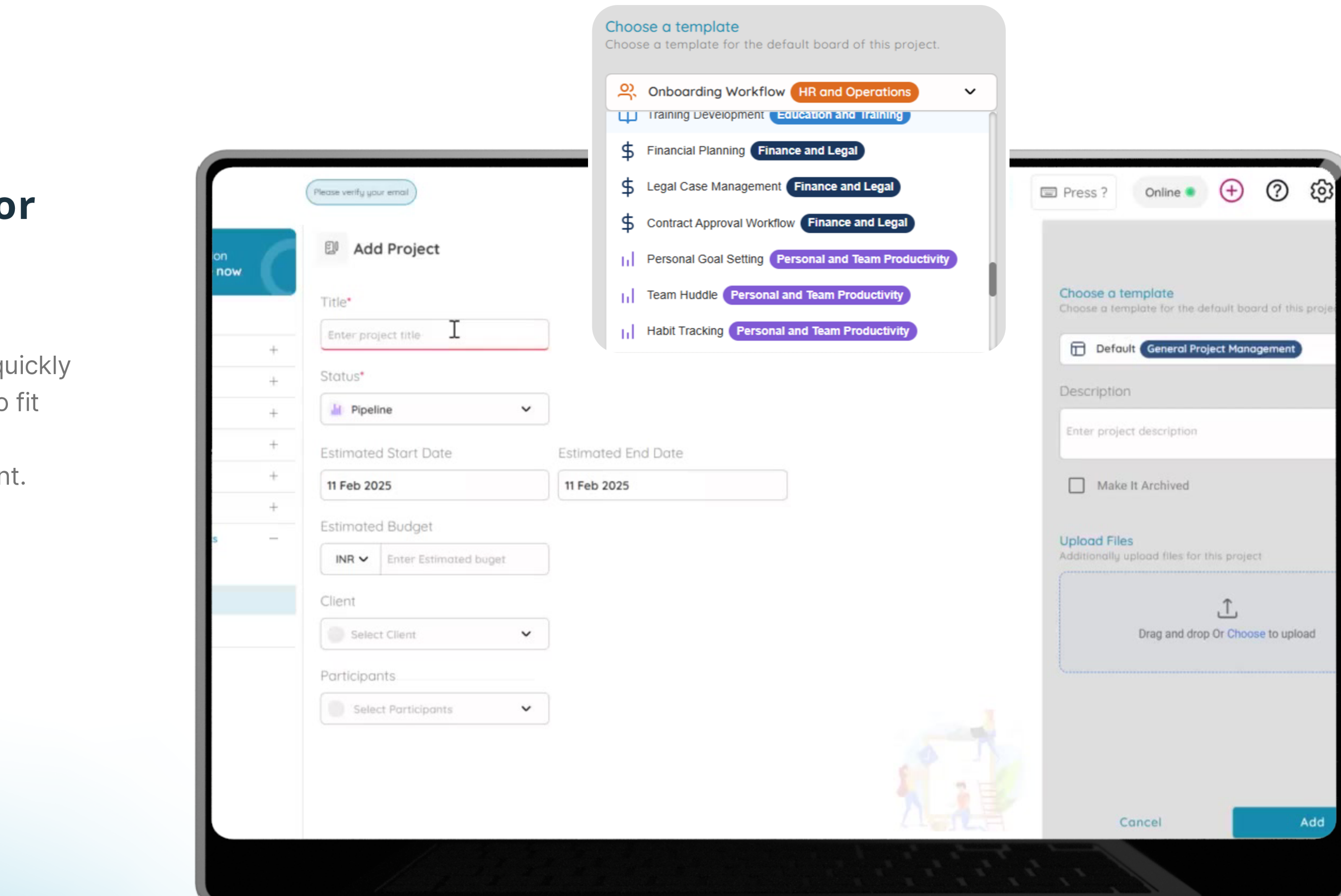




Pre-Built Templates for Every Team

With pre-defined templates, you can quickly set up and customize your workflow to fit your unique needs, making project management simpler and more efficient.

- General Project Management
- Software Development
- Marketing & Creative Teams
- Product Management
- HR & Operations
- Education & Training
- Finance & Ledger
- Personal & Team Productivity
- Founder's Office
- Founder's Guide
- Housing Development Project
- Commercial Development Project
- Fleet Management



Unified Platform Across Functions

- Cross-Departmental Management: Streamline workflows across Operations, Finance, and Strategy from a single platform.
- Customizable to Your Team's Needs: From operational task tracking to financial audits and strategic goal tracking, tailor it to any function.

Marketing and Creative Teams

Founder's Office

Software Development

Product Management

Fleet's Management

HR & Operations

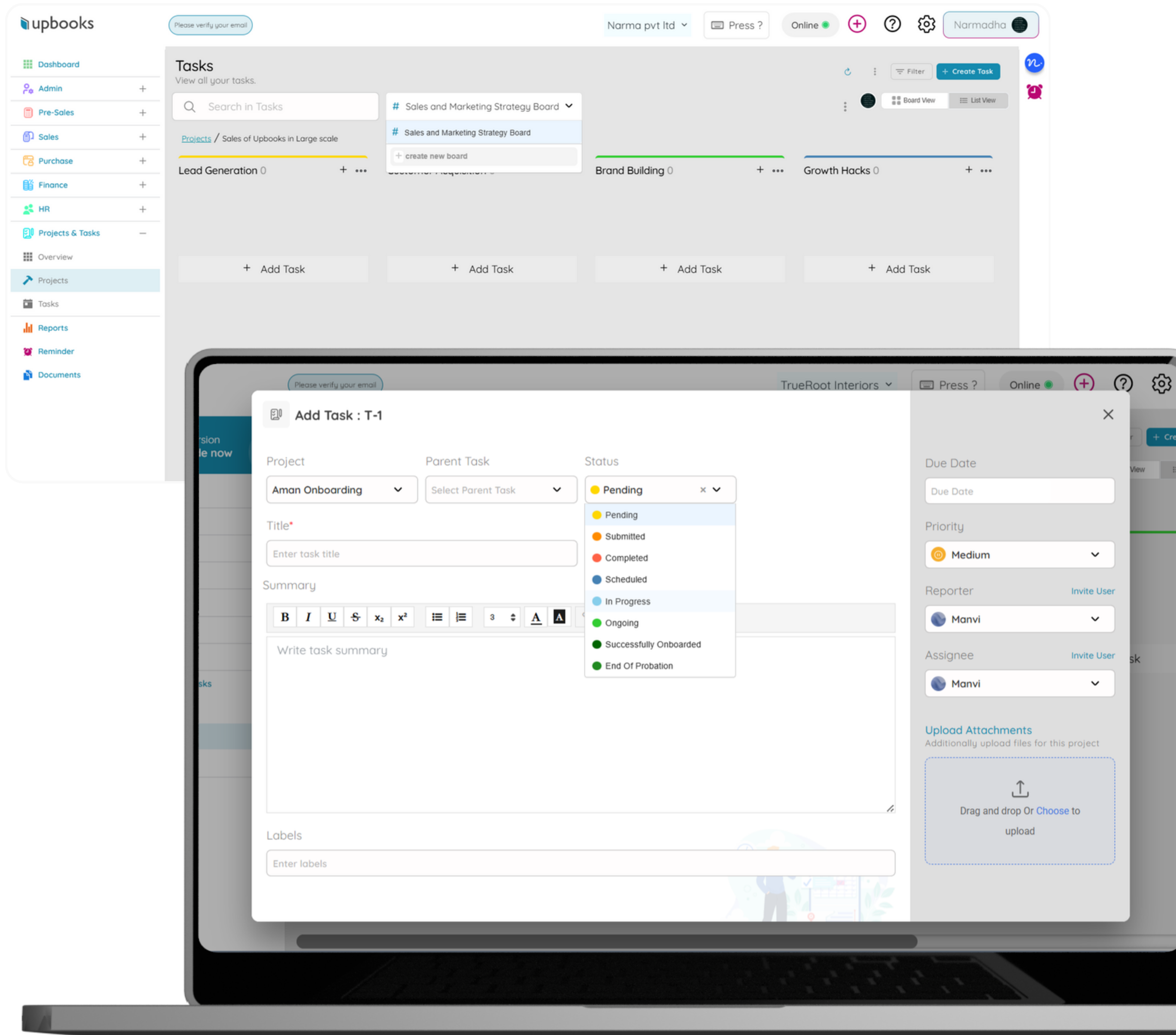
Education and Training

General Project Management



Color-Coded Task and Status Tracking

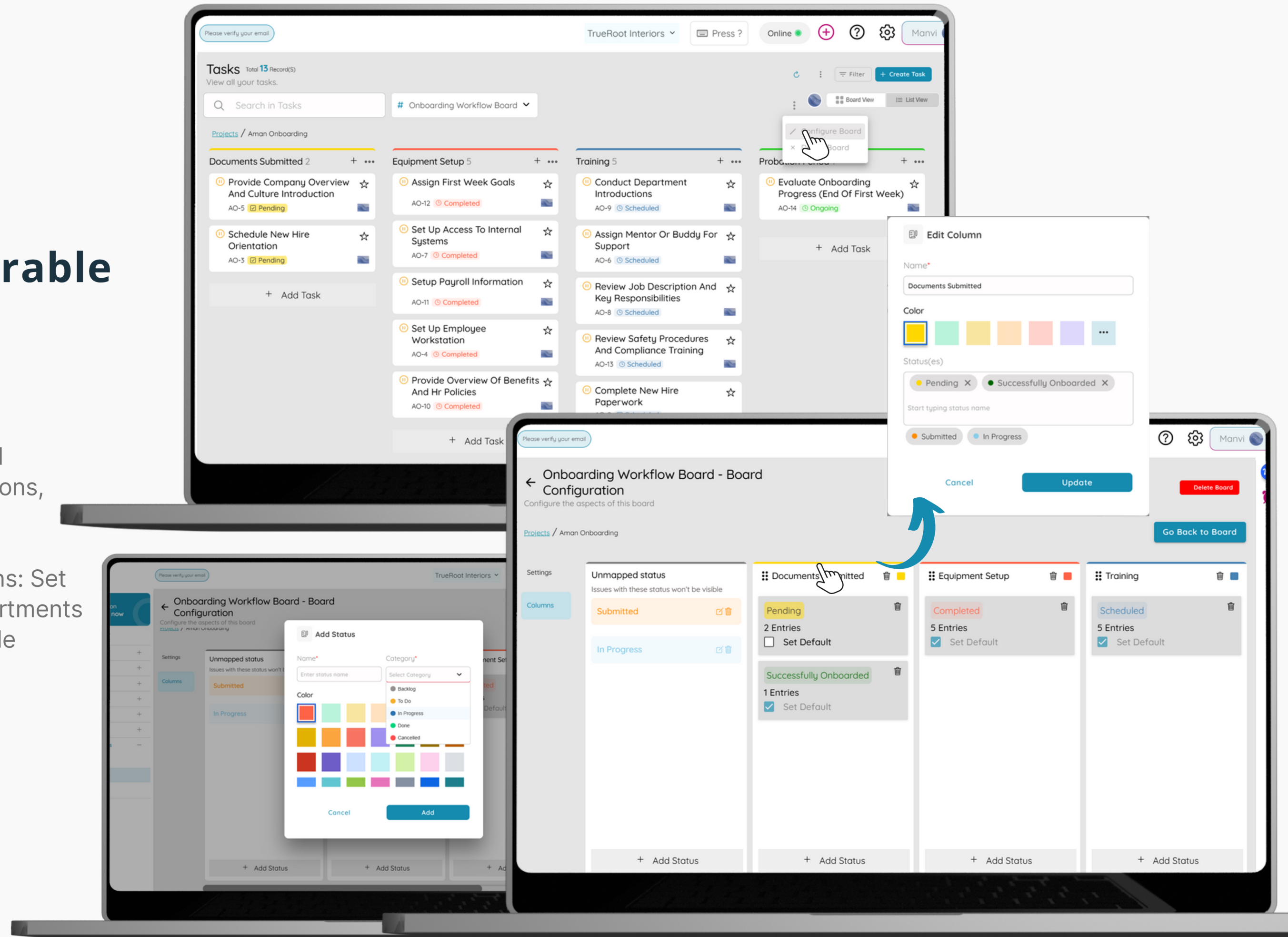
- Visualize Progress Instantly: Color-coded statuses help track task progress across operations, finance, and strategy in real time.
- From "Scheduled" to "Completed": Track your team's performance across various stages of operations and strategic milestones.





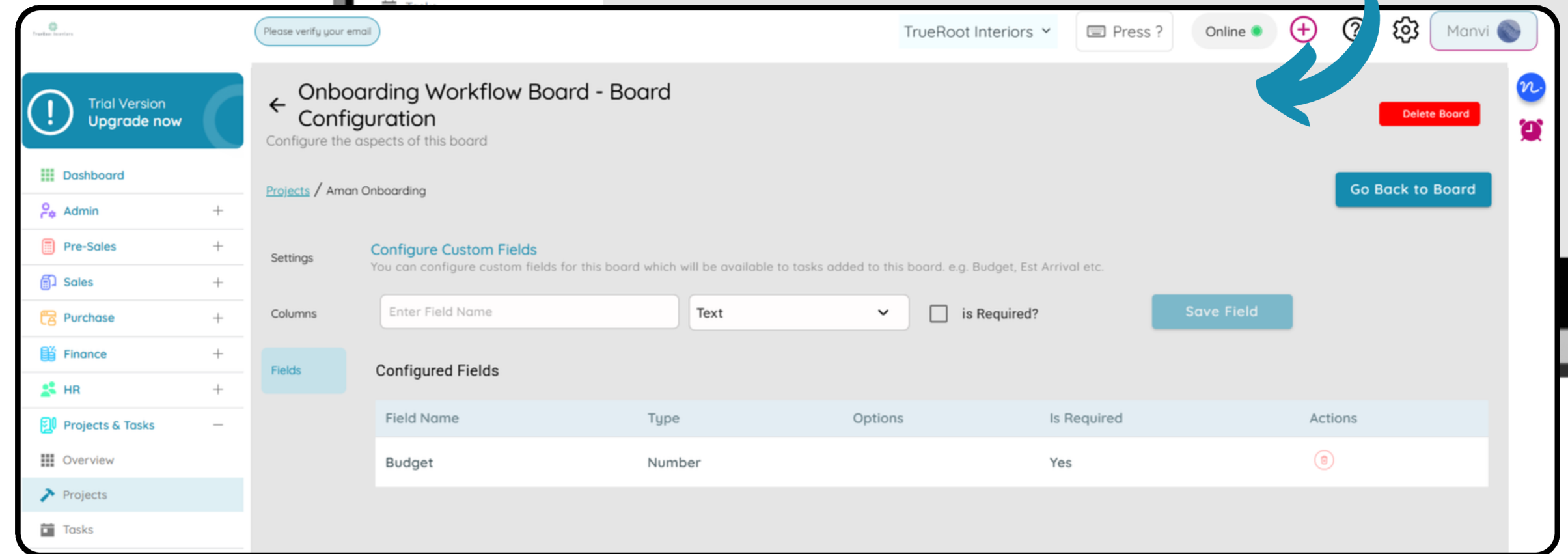
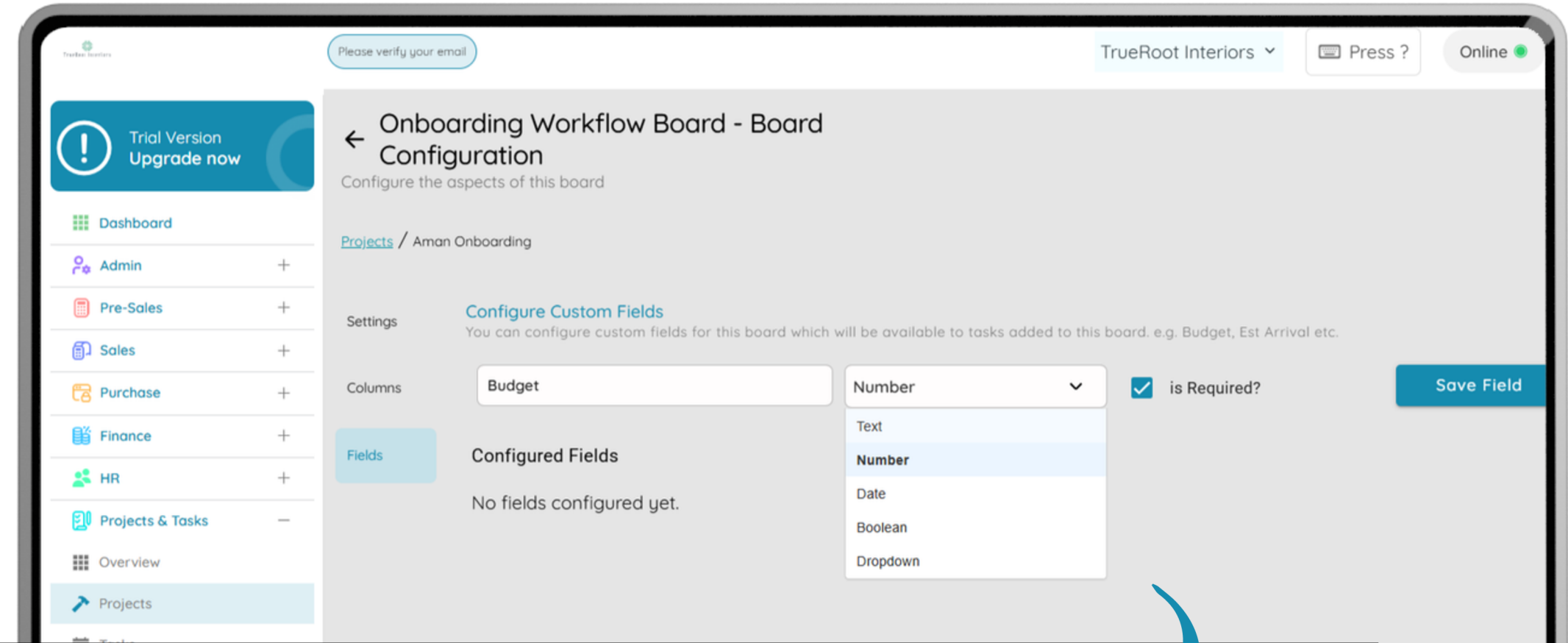
A Flexible, Configurable Solution

- Customize It Your Way: Tailor the platform to your exact needs—add custom fields, workflows, permissions, and more.
- Department-Specific Configurations: Set up unique views for different departments (operations, finance, strategy) while maintaining a unified structure.



Configure Custom Fields

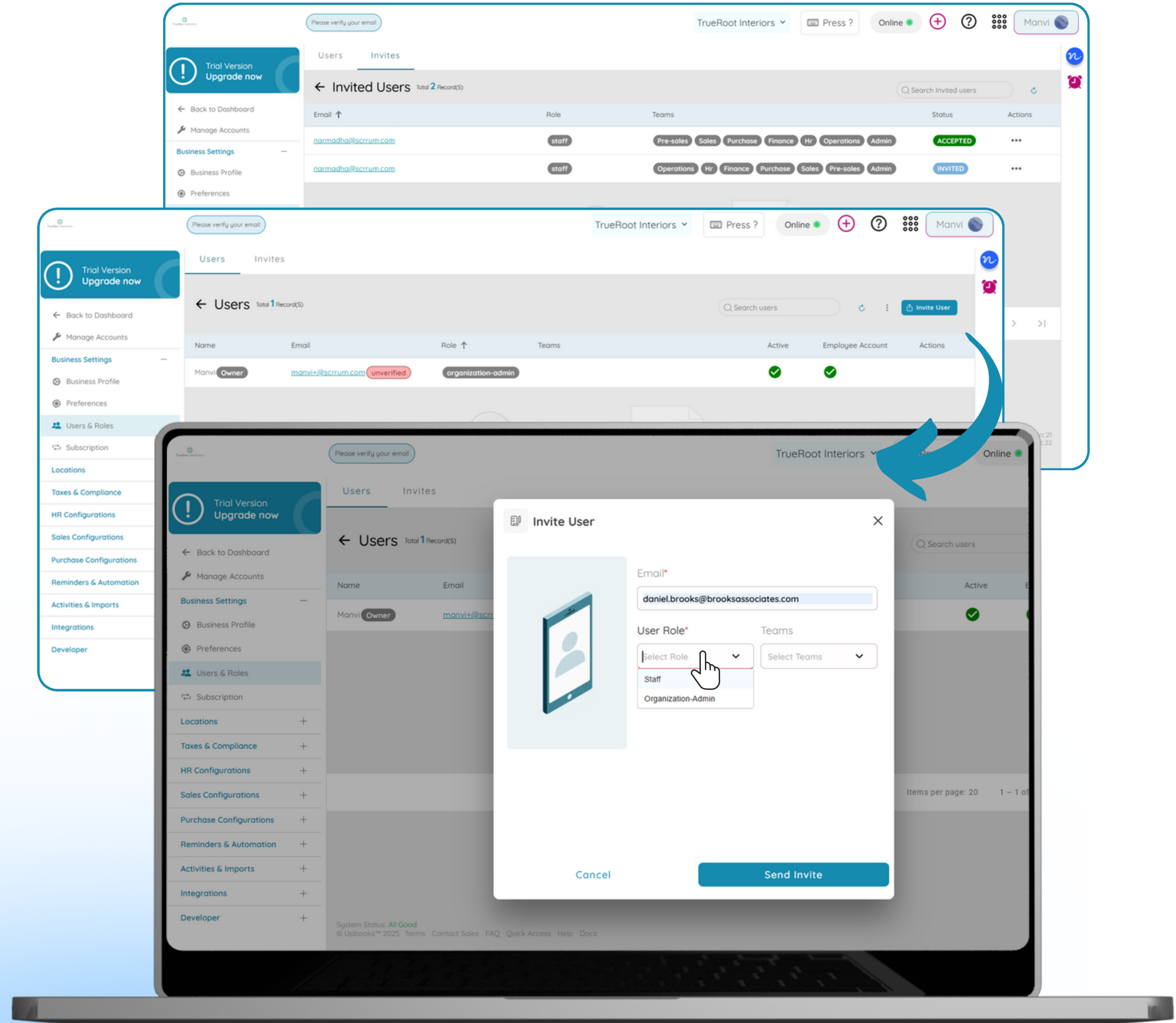
You can configure custom fields for boards which will be available to tasks added to the board. e.g. Budget, Est. Arrival etc.





Real-Time Collaboration for Cross-Functional Teams

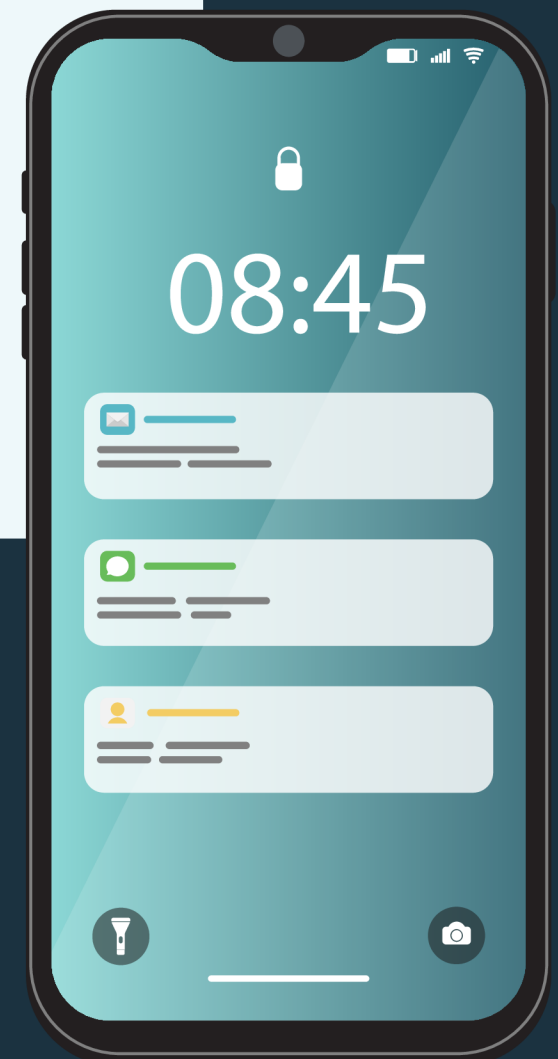
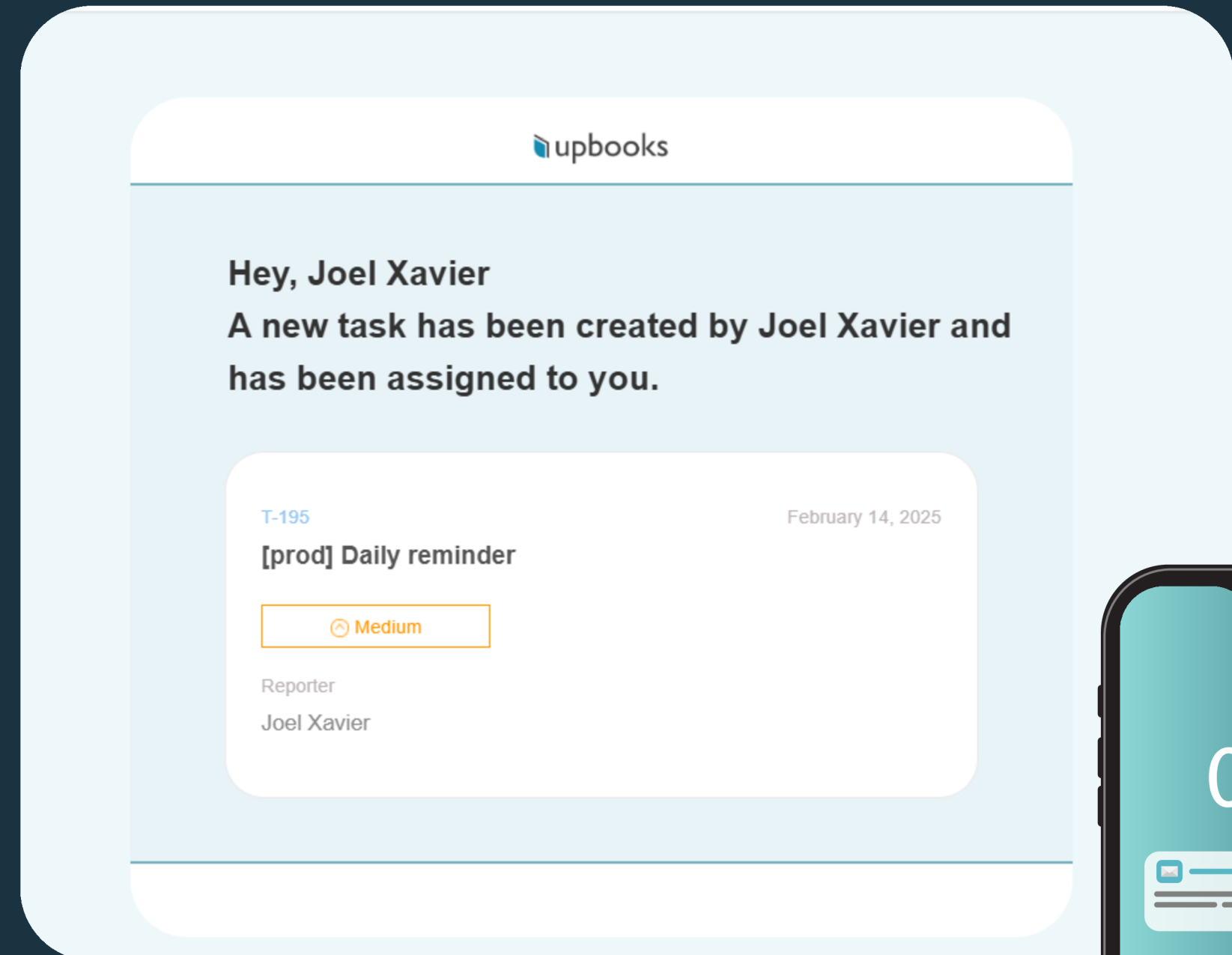
- Collaborate Across Departments: Operations, finance, and strategy teams can work simultaneously, stay updated in real time, and share progress on tasks.
- Custom Notifications: Receive alerts and updates across different areas—whether it's a new invoice, project milestone, or operational bottleneck





Stay Informed with Instant Updates

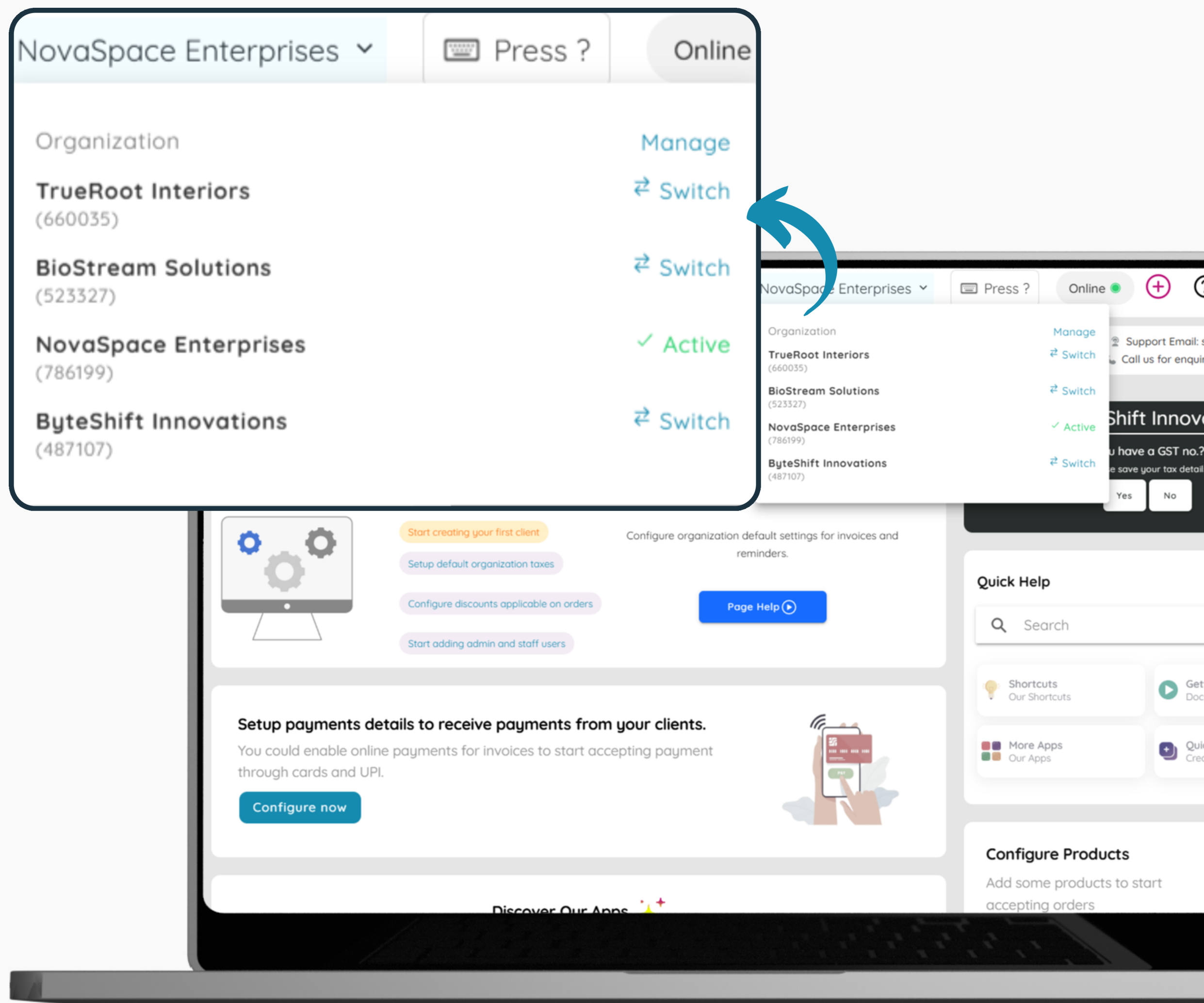
- Real-Time Notifications and Alerts: Get real-time updates on tasks, financial transactions, and strategic goals as they progress.
- Ensure Nothing Gets Missed: Track your team's updates without delay—whether it's financial approvals or operational tasks.





Scalable for Any Size Organization

- From Startups to Enterprises: Whether you have a small team or a large enterprise, the platform adapts to the complexity of your needs.
- Scalability at Its Best: Add more departments, workflows, and templates as your business grows

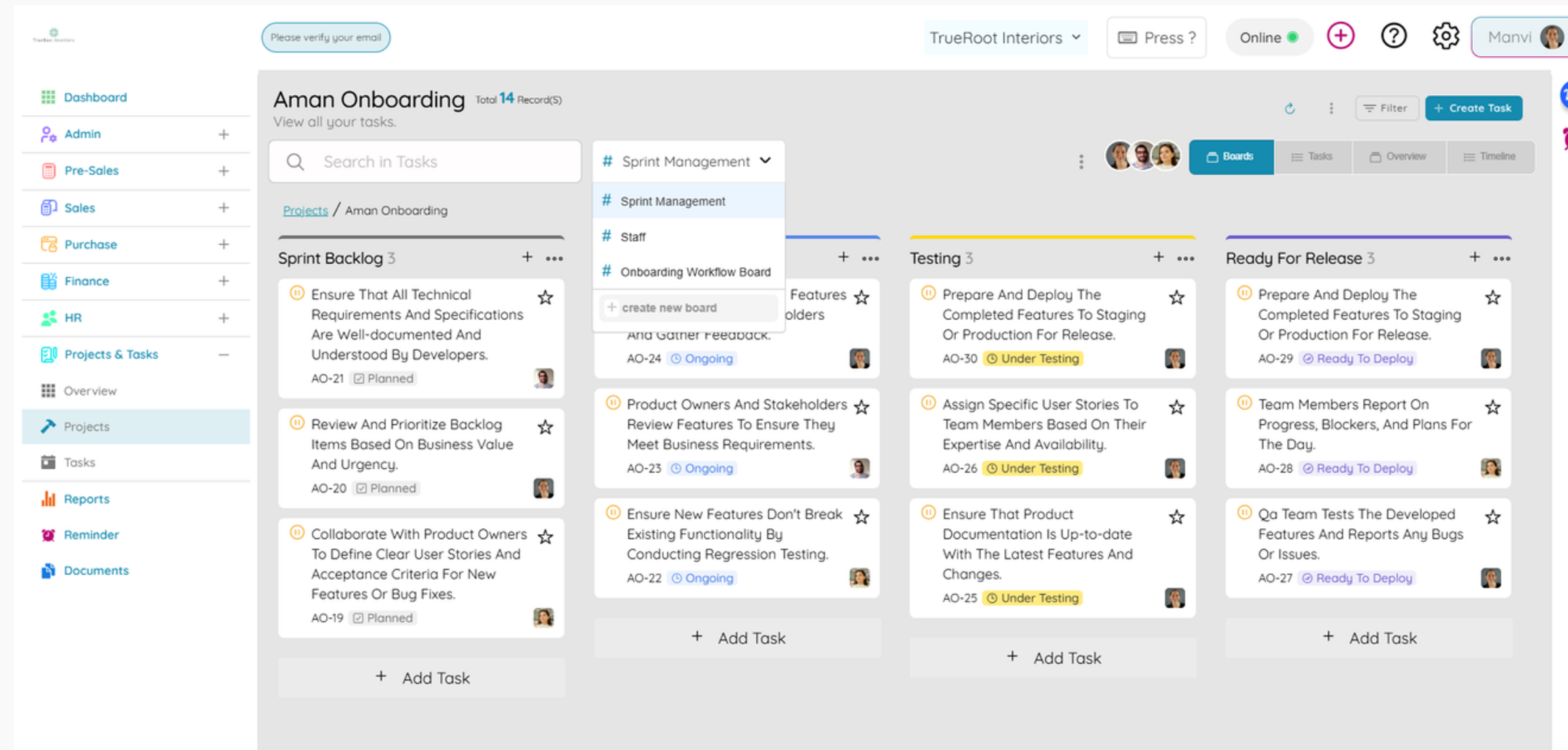


Case Study 1: Sprint Management for Software Development

Industry: SaaS (Software as a Service)

Team Size: 12 (Developers, QA, Designers, Product Owners, Scrum Master)

Objective: Streamline Agile sprints for faster, more organized software delivery while improving team collaboration and product quality.



Solution:

Company implemented a customized Agile sprint board with sections tailored to each development stage:

Sprint Backlog: Collect and prioritize user stories, bugs, and feature requests.

Sprint Planning: Select tasks for the sprint, estimate effort, and assign story points.

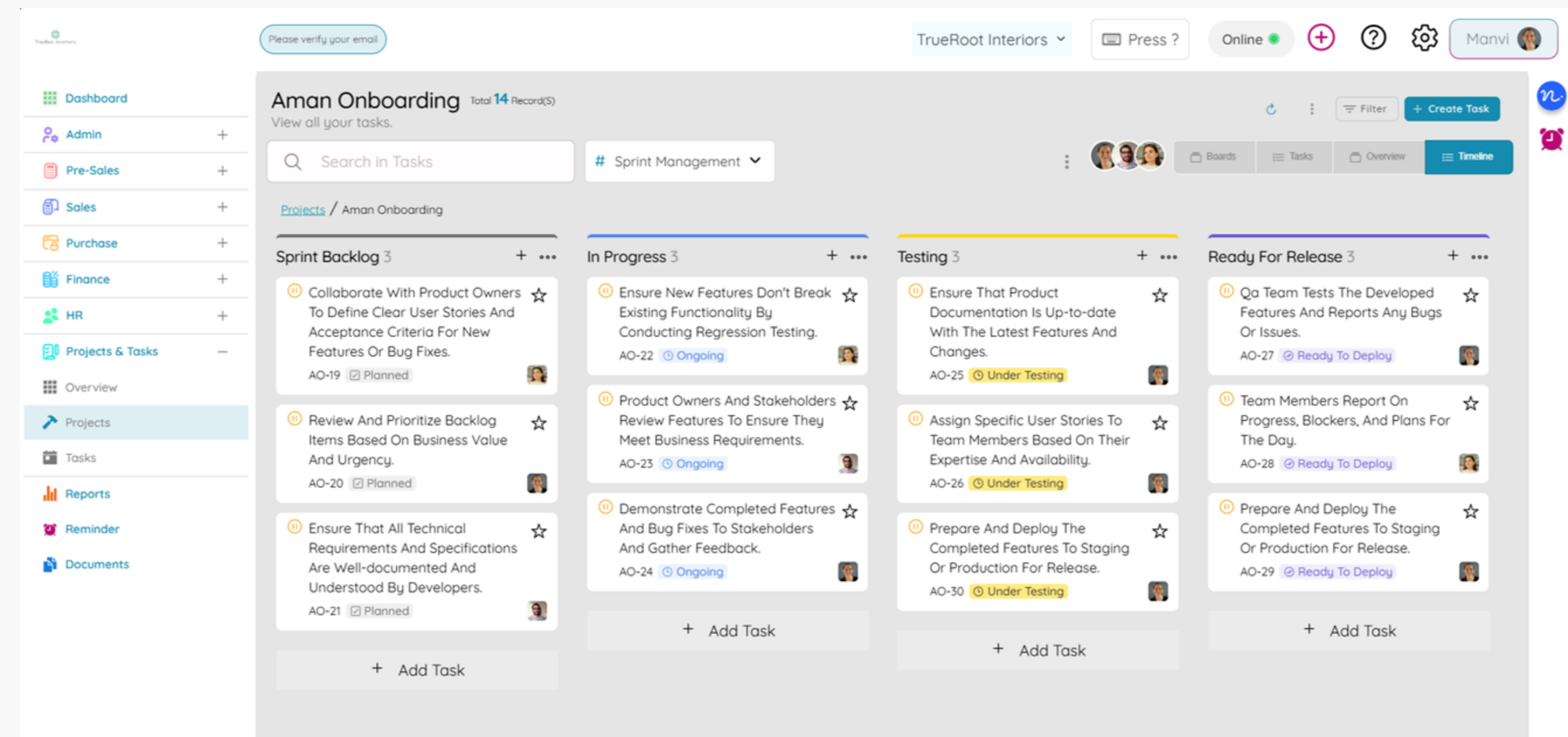
In Progress: Track tasks actively being developed.

Code Review: Manage pull requests, ensure best practices, and address feedback.

Testing: Run automated and manual tests, log defects, and track fixes.

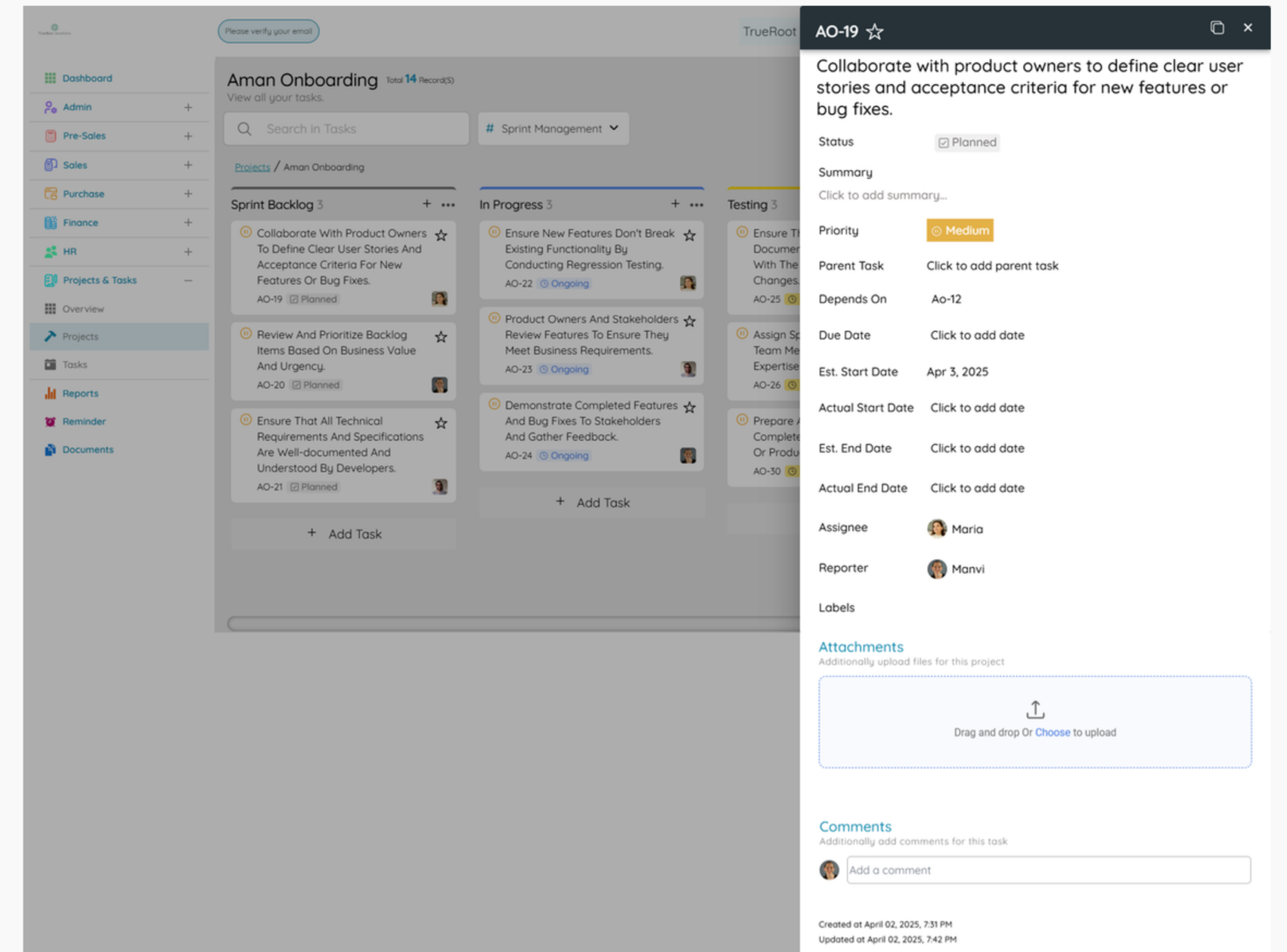
Ready for Release: Tasks that have passed development, code review, and QA, but are waiting for deployment or stakeholder approval.

Done: Mark tasks as complete, ready for release.



Roles Involved:

- *Product Owner*: Manages backlog, defines priorities, and aligns tasks with business goals.
- *Scrum Master*: Facilitates sprint planning, resolves blockers, and ensures Agile practices.
- *Developers*: Pick tasks from the board, build features, and submit code for review.
- *QA Engineers*: Test features, log issues, and verify bug fixes.
- *UI/UX Designers*: Work on design tasks and review UI components during testing.



Key Benefits:

- Clear Task Visualization: Everyone knows what's in progress, what's stuck, and what's done.
- Faster Iterations: Short sprints (1-2 weeks) with clear goals and immediate feedback.
- Improved Collaboration: Seamless communication through board comments and task updates.
- Increased Accountability: Each task is assigned, with deadlines and owners clearly visible.

Measurable Outcomes:

- Sprint Velocity: Increased by 20% after adopting the board system.
- Bug Resolution Time: Reduced by 30% with streamlined testing and code review stages.
- Release Frequency: Accelerated from monthly to bi-weekly releases.
- Stakeholder Satisfaction: 95% of product feedback incorporated within two sprints.

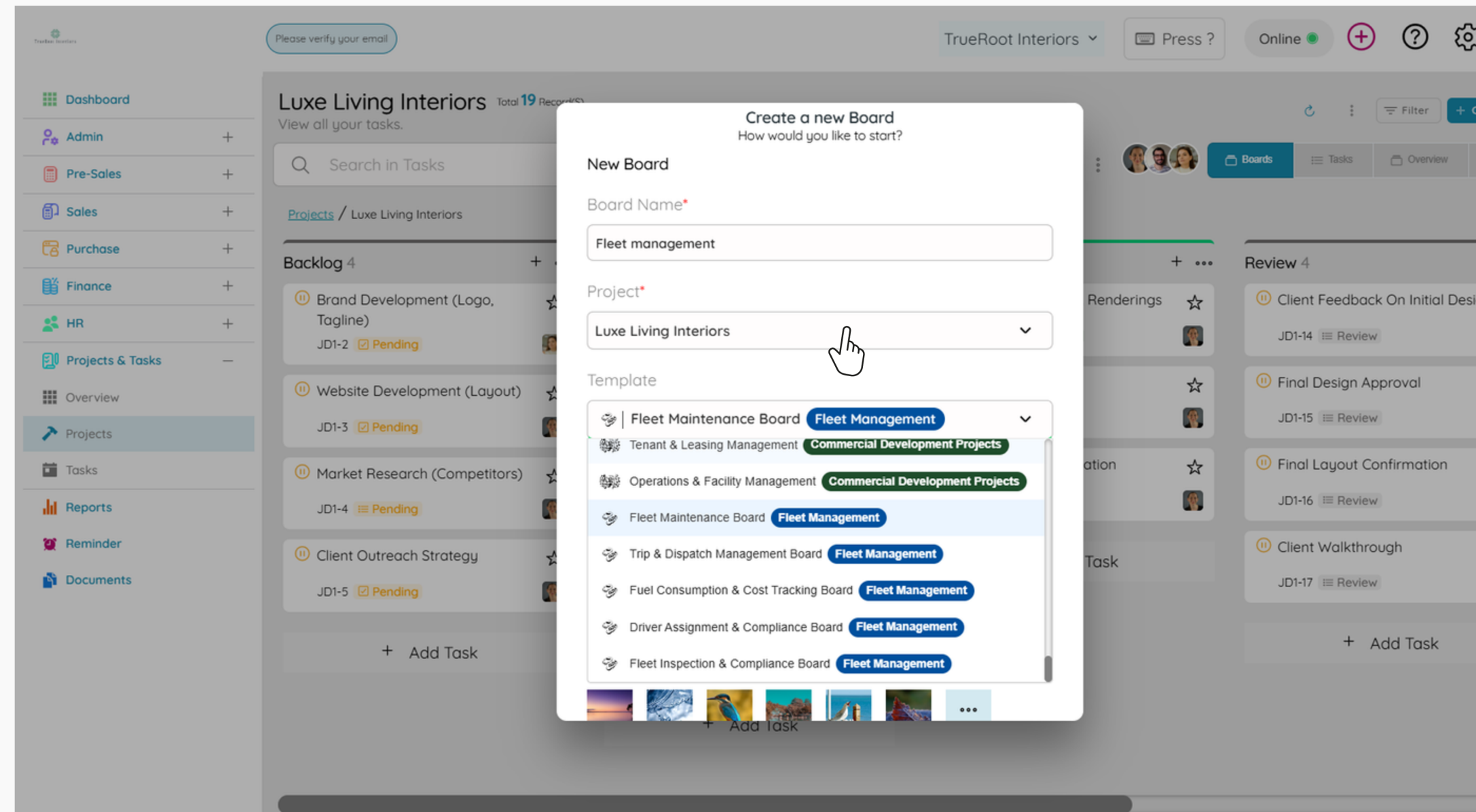


Case Study 2: Fleet Management - Maintenance Tracking

Industry: Logistics & Transportation

Team Size: 50 (including drivers, technicians, and fleet managers)

Objective: Minimize vehicle downtime, optimize maintenance schedules, and improve fleet longevity through streamlined issue tracking and repair workflows.

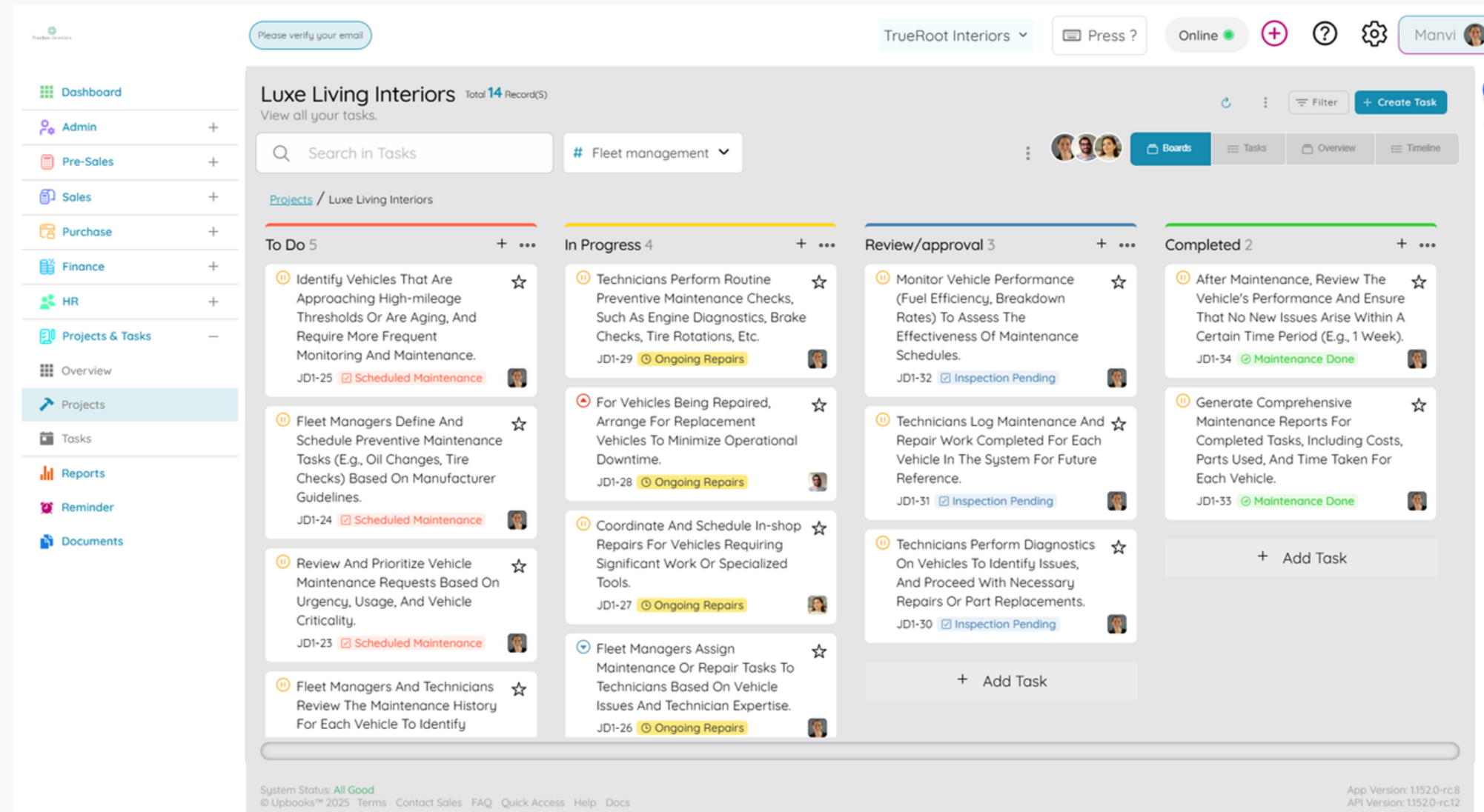


Solution:

Rapid Logistics implemented a Fleet Maintenance Board to manage maintenance cycles and vehicle issues, improving team coordination and response times.

Board Stages:

- **Reported Issue:** Drivers or managers log vehicle issues (e.g., engine trouble, tire damage).
- **Inspection Scheduled:** Technicians are assigned, with automatic reminders.
- **In Progress:** Active repair work, with progress notes.
- **Parts on Order:** Delays tracked, with estimated delivery dates.
- **Maintenance Complete:** Repairs done, vehicles ready for a test run.
- **Pending Review:** Final inspection and quality check.
- **Back in Service:** Vehicle returned to the fleet, marked as available.



The screenshot displays the Upbooks Fleet Maintenance Board for 'Luxe Living Interiors'. The board is organized into four columns representing different stages of the maintenance process:

- To Do (5 tasks):** Tasks include identifying high-mileage vehicles, defining preventive maintenance tasks, reviewing and prioritizing requests, and assigning tasks to technicians.
- In Progress (4 tasks):** Tasks include performing routine preventive maintenance, replacing parts to minimize downtime, scheduling in-shop repairs, and assigning maintenance tasks.
- Review/Approval (3 tasks):** Tasks include monitoring vehicle performance, logging maintenance and repair work, and performing diagnostics.
- Completed (2 tasks):** Tasks include reviewing performance after maintenance and generating comprehensive reports.

The interface also features a sidebar with navigation options, a search bar, and a user profile for 'Marvi'. The system status is 'All Good'.

Usage & Issue Resolution Data:

- Fleet Size: 100 vehicles
- Monthly Reported Issues: ~75 cases
- Average Repair Time: 8 hours
- Issues Resolved in First Attempt: 85%
- Preventive Maintenance Tasks Completed: 120/month
- Downtime Reduction: 30% after board implementation

Key Benefits:

- Faster Turnaround: 25% reduction in vehicle downtime.
- Better Resource Management: Optimized technician scheduling.
- Proactive Maintenance: Scheduled servicing reduces unexpected failures.
- Data-Driven Insights: Identify recurring issues to improve vehicle purchasing decisions.

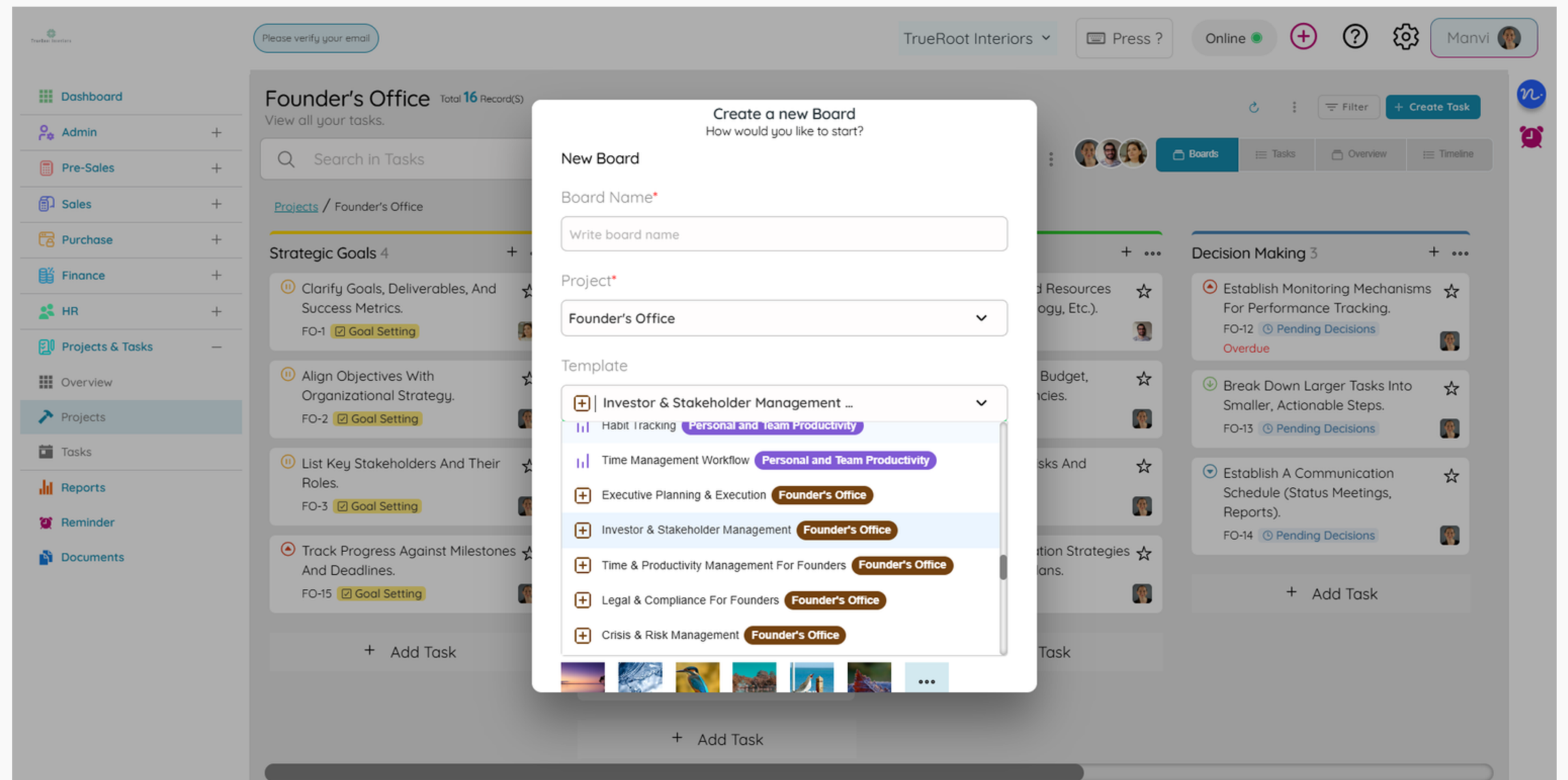


Case Study 3: Founder's Office - Investor & Stakeholder Management

Industry: Startup & Entrepreneurship

Team Size: 5-10 (Founders, Executive Assistants, Finance Leads)

Objective: Streamline investor relations, enhance communication strategies, and manage board meetings & partnerships to drive growth and secure funding



Solution:

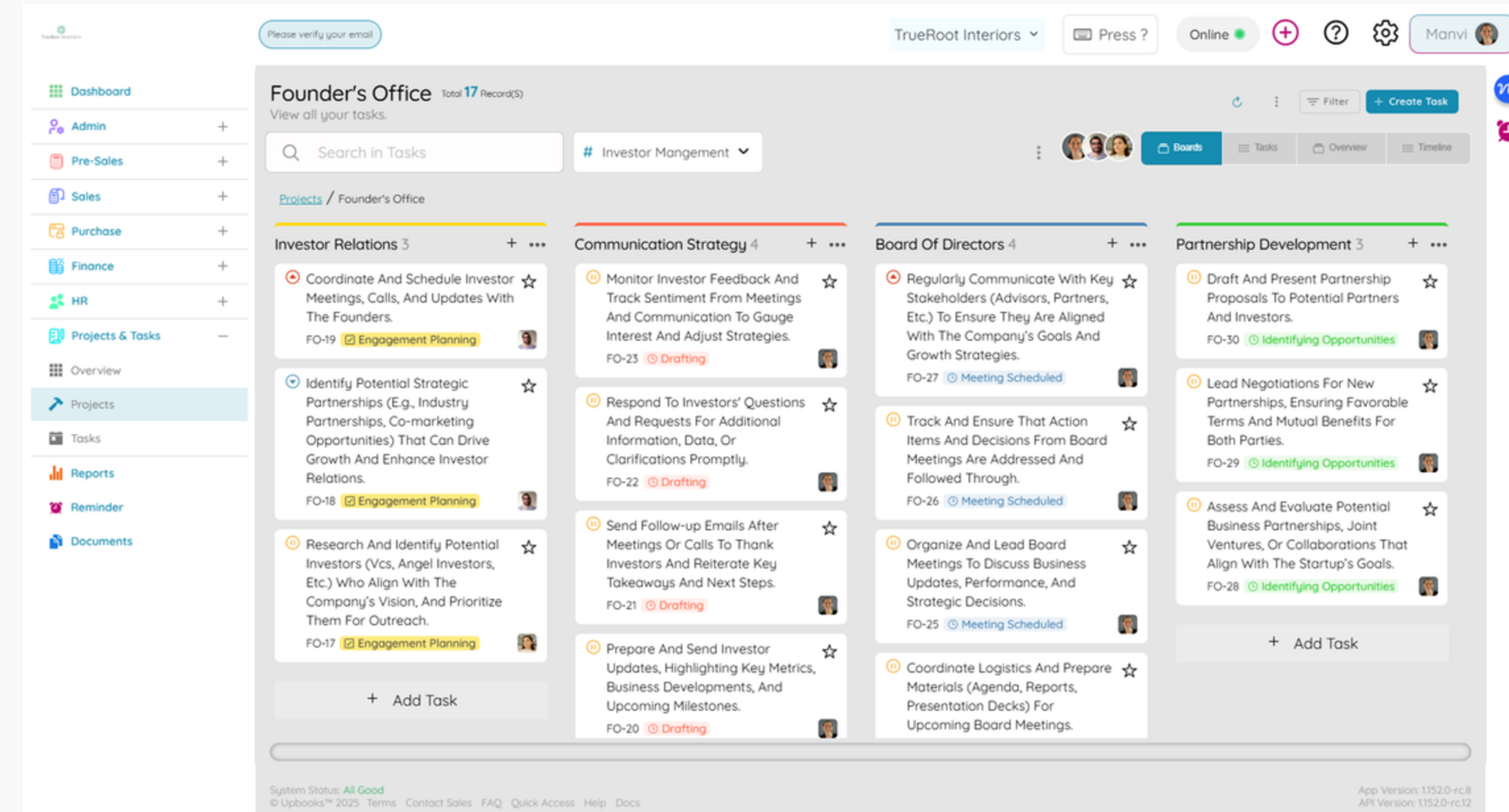
Upbooks implemented an Investor & Stakeholder Management Board with customizable fields and tailored sections to help founders manage every aspect of investor and stakeholder engagement.

Board Stages:

- **Potential Investors:** Track investor leads, funding stage, and interest level.
- **Initial Outreach:** Log pitch meetings, calls, and investor queries.
- **Follow-Up & Nurturing:** Automate reminders for follow-ups and ongoing conversations.
- **Due Diligence:** Monitor documentation, audits, and investor requests.
- **Funding Secured:** Record successful investments, funding amount, and key terms.
- **Stakeholder Updates:** Schedule regular reports and update cycles.
- **Board Meetings & Decisions:** Track meeting agendas, action items, and resolutions.
- **Partnership Development:** Manage potential partners, collaboration stages, and agreement terms.
- **Feedback Loop:** Collect and track feedback from investors and partners to refine strategies.

Usage & Issue Resolution Data:

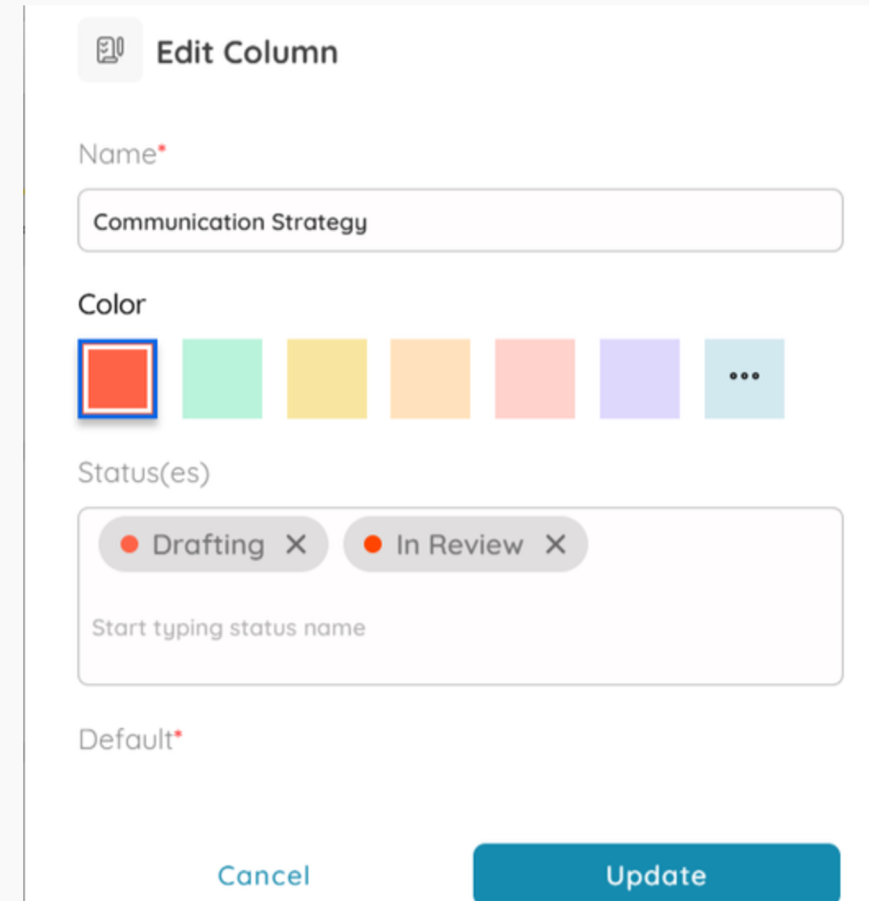
- Investor Prospects Tracked: 75+
- Partnerships Finalized: 10+
- Successful Funding Rounds: 3
- Follow-Ups Automated: 80% with reminders
- Time Saved in Manual Tracking: 45%
- Board Meeting Efficiency Increase: 30% with organized agenda & decision logs
- Faster Funding Closure: 20% faster deal cycles due to structured outreach and follow-ups



The screenshot displays the Upbooks task management interface for a project named "Founder's Office". The interface is organized into a grid of task cards, each representing a specific task within a project category. The categories are "Investor Relations", "Communication Strategy", "Board of Directors", and "Partnership Development". Each task card includes a title, a status indicator (e.g., "Engagement Planning", "Drafting", "Meeting Scheduled"), a date, and a star icon for marking as important. The interface also features a sidebar with navigation options like "Dashboard", "Admin", "Pre-Sales", "Sales", "Purchase", "Finance", "HR", "Projects & Tasks", "Overview", "Projects", "Tasks", "Reports", "Reminder", and "Documents". The top right corner shows the user's name "Manvi" and various utility icons. The bottom of the screen displays system status and version information.

Key Benefits:

- Custom Fields for Precision: Easily capture investor preferences, meeting cadences, and funding stages without relying on external spreadsheets.
- Seamless Communication Strategy: Track every interaction, ensuring investors and stakeholders receive timely, personalized updates.
- Board of Directors Management: Keep board members informed with automated reports, action items, and voting outcomes.
- Partnership Development & Nurturing: Simplify tracking of partnership opportunities and ensure no potential deal slips through the cracks.
- Continuous Feedback Loop: Use feedback fields to gather insights from investors and partners, continuously refining business strategies.



Edit Column

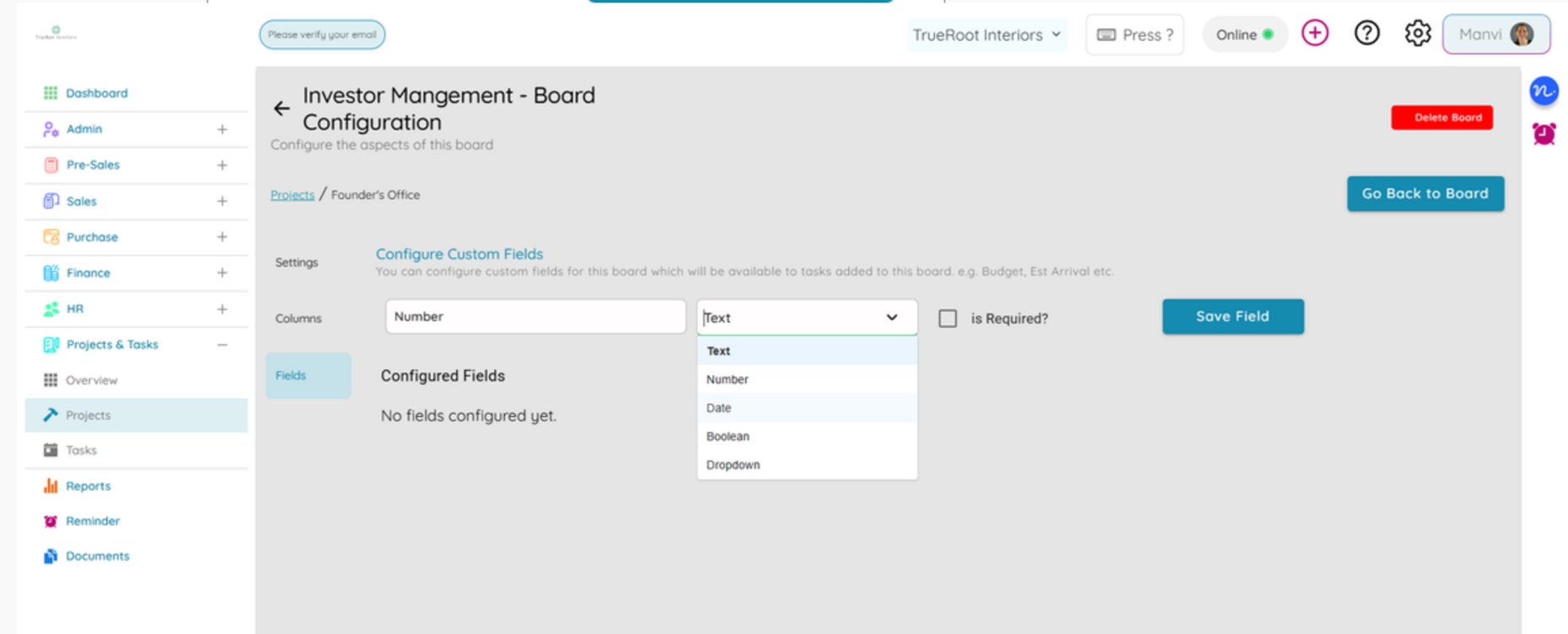
Name*
Communication Strategy

Color
Red Green Yellow Orange Pink Purple More

Status(es)
Drafting In Review
Start typing status name

Default*

[Cancel](#) [Update](#)



Please verify your email

TrueRoot Interiors Press ? Online + ? Settings Marvi

Investor Management - Board Configuration

Configure the aspects of this board

[Projects / Founder's Office](#)

Settings **Configure Custom Fields**
You can configure custom fields for this board which will be available to tasks added to this board. e.g. Budget, Est Arrival etc.

Columns is Required? [Save Field](#)

Fields

Configured Fields
No fields configured yet.

[Delete Board](#) [Go Back to Board](#)

- Dashboard
- Admin +
- Pre-Sales +
- Sales +
- Purchase +
- Finance +
- HR +
- Projects & Tasks -
- Overview
- Projects**
- Tasks
- Reports
- Reminder
- Documents

Text
Number
Date
Boolean
Dropdown

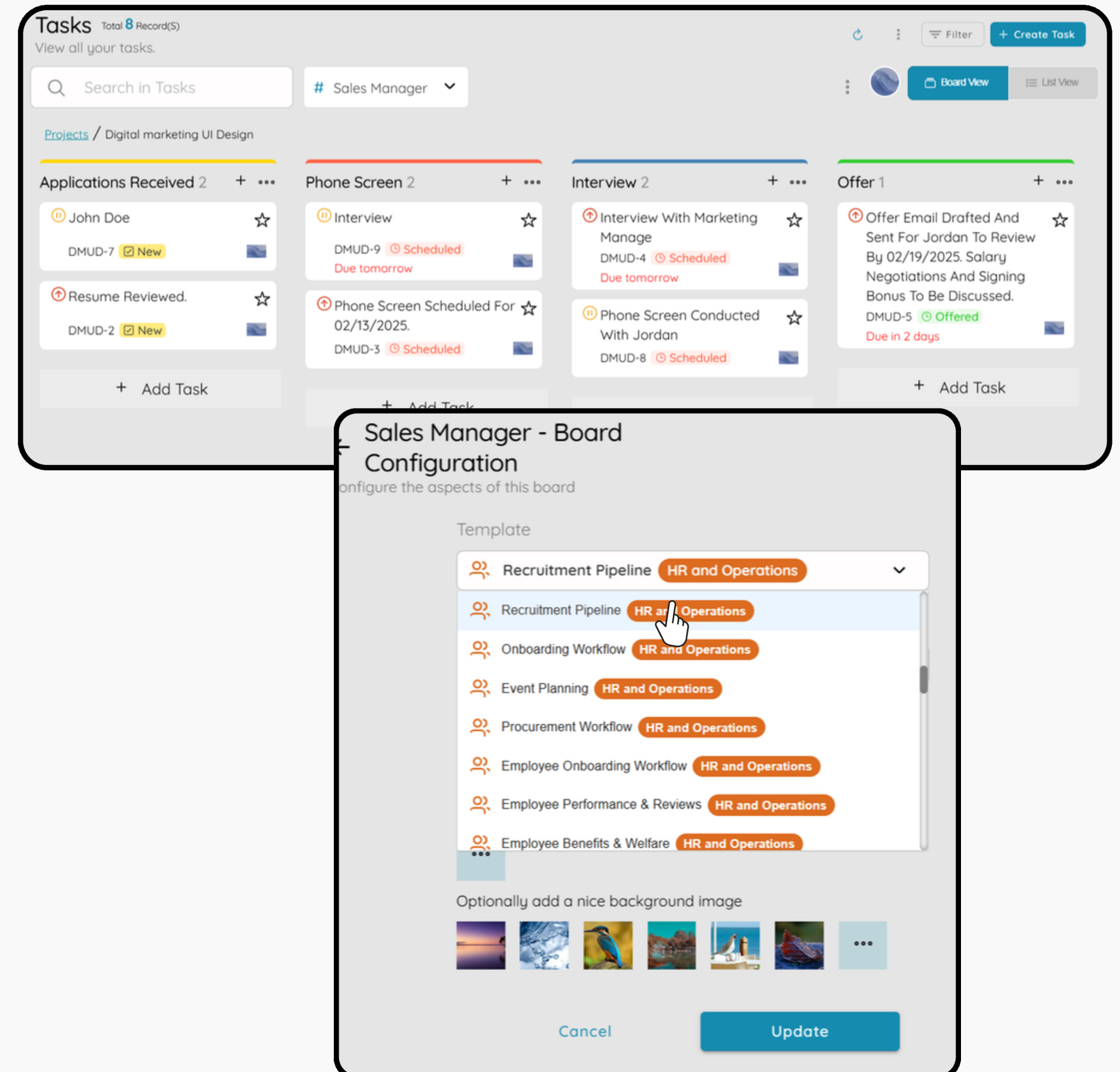
Case Study 4: Recruitment Pipeline Management

Company: Tech Innovators Inc.

Objective: Streamline and track the recruitment process.

Solution: Tech Innovators implemented a customized recruitment board with sections such as:

- Applications Received
- Phone Screen
- Interview
- Offer
- Hired





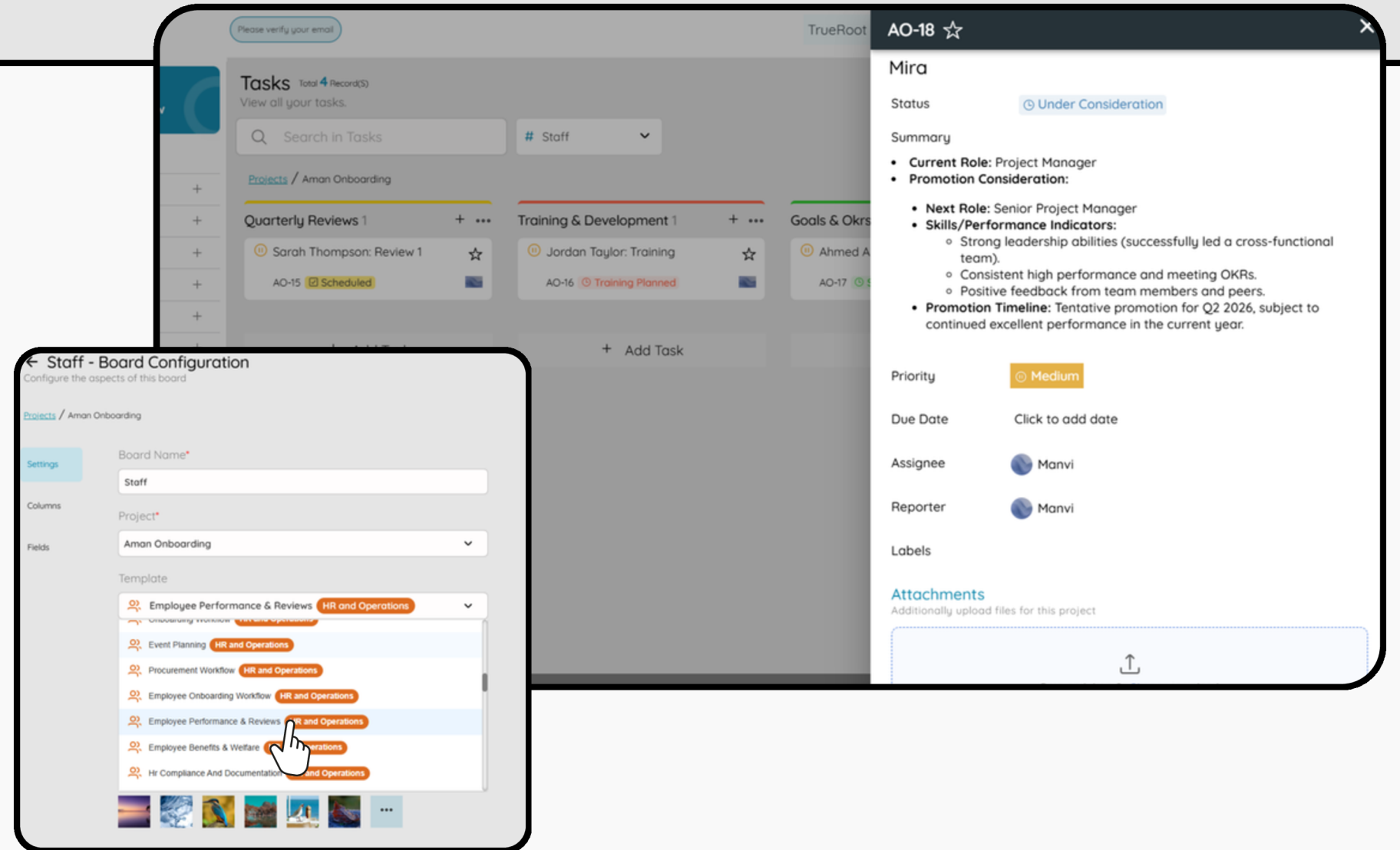
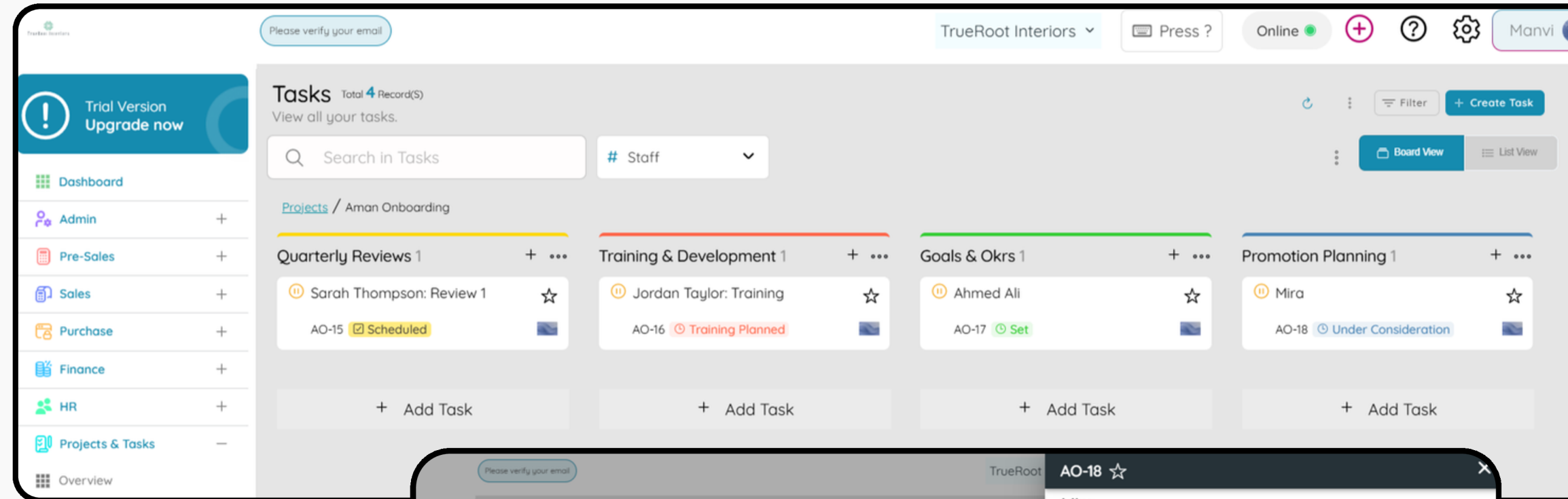
Case Study 5: Employee Performance Management

Company: BrightFuture Ltd.

Objective: Streamline the employee performance review process.

Solution: BrightFuture created a performance management board with sections like:

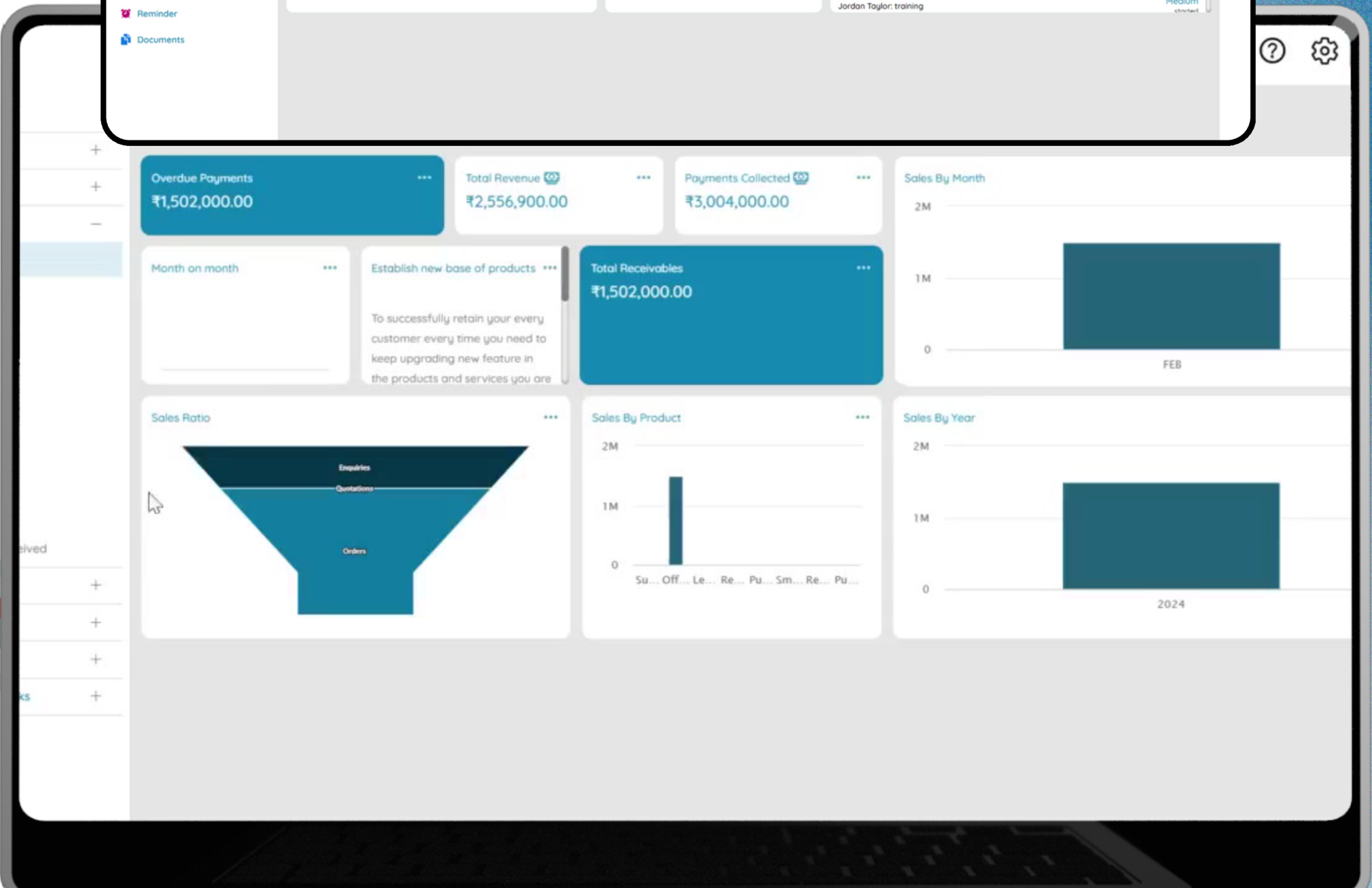
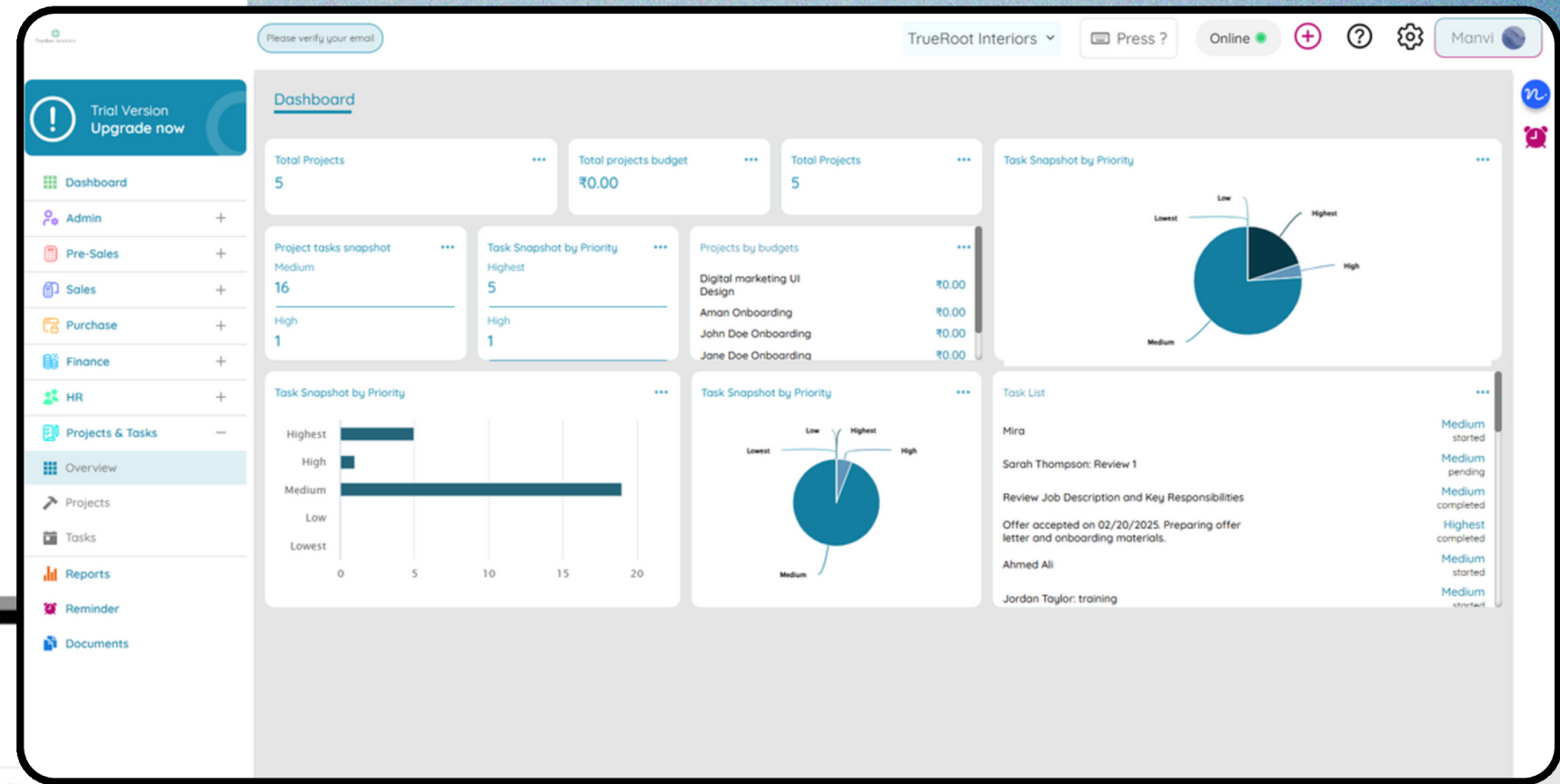
- Quartely Reviews
- Training & Development
- Goals & Okrs
- Promotion Planning





Strategic Planning and Monitoring

- Achieve Strategic Goals: Manage and track your business strategies, monitor KPIs, and visualize progress.
- Customizable Strategy Boards: Set, measure, and track strategic goals with templates that align with your long-term vision.





Real-Time Analytics and Reporting

Track Business Performance: Measure success through customized reports—whether financial performance, operational efficiency, or strategic progress.

Please verify your email

TrueRoot Interiors

Press ? Online

Trial Version Upgrade now

- Dashboard
- Admin +
- Pre-Sales +
- Sales +
- Purchase +
- Finance +
- HR +
- Projects & Tasks +
- Reports**
- Reminder
- Documents

Insight into service-based revenue streams.

Monthly sales trends to drive strategic planning.

Year-over-year insight

Sales By Quarter
Quarterly breakdown for precise performance tracking.

Sales By Country
Discover global sales distribution for better expansion.

Sales By HSN
Detailed sales analysis

GST Reports

Taxes By Month
Monthly tax overview to ensure compliance.

GST Summary
Comprehensive summary of GST collections and payments.

Financial Report

General Ledger
Complete financial snapshot of transactions and balances.

Profit & Loss
Track profits, losses, and overall financial health.

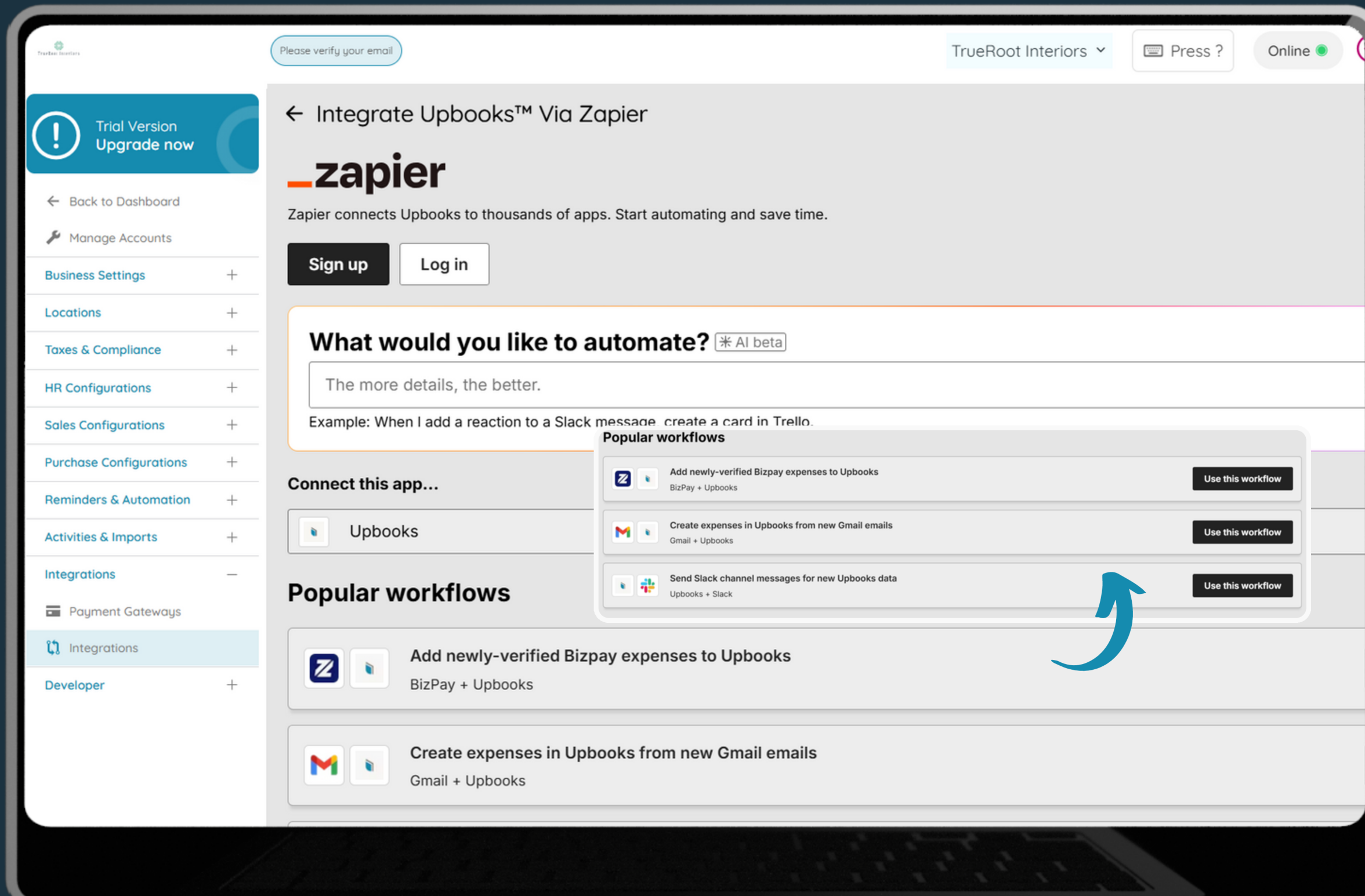
Profit & Loss Horizontal
A side-by-side view of financials.

Trial Balance
Validating every transaction for financial accuracy.

Balance Sheet
Assets, liabilities, and equity for total financial health.

EBITDA Report
Measure core earnings

Currency Rates
Current currency exchange rates for global operations.



Effortless Integration with Existing Tools

- Connect Seamlessly: Integrate with tools your teams are already using, such as CRM, accounting software, and communication tools.
- APIs for Easy Data Flow: Ensure smooth data exchange between systems for seamless workflows.



Get Started Today

Take control of your business workflows—Request a demo or start your free trial today.





Have Questions? We're Here to Help!



www.upbooks.io



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