



Transform Your Sales & Customer Management

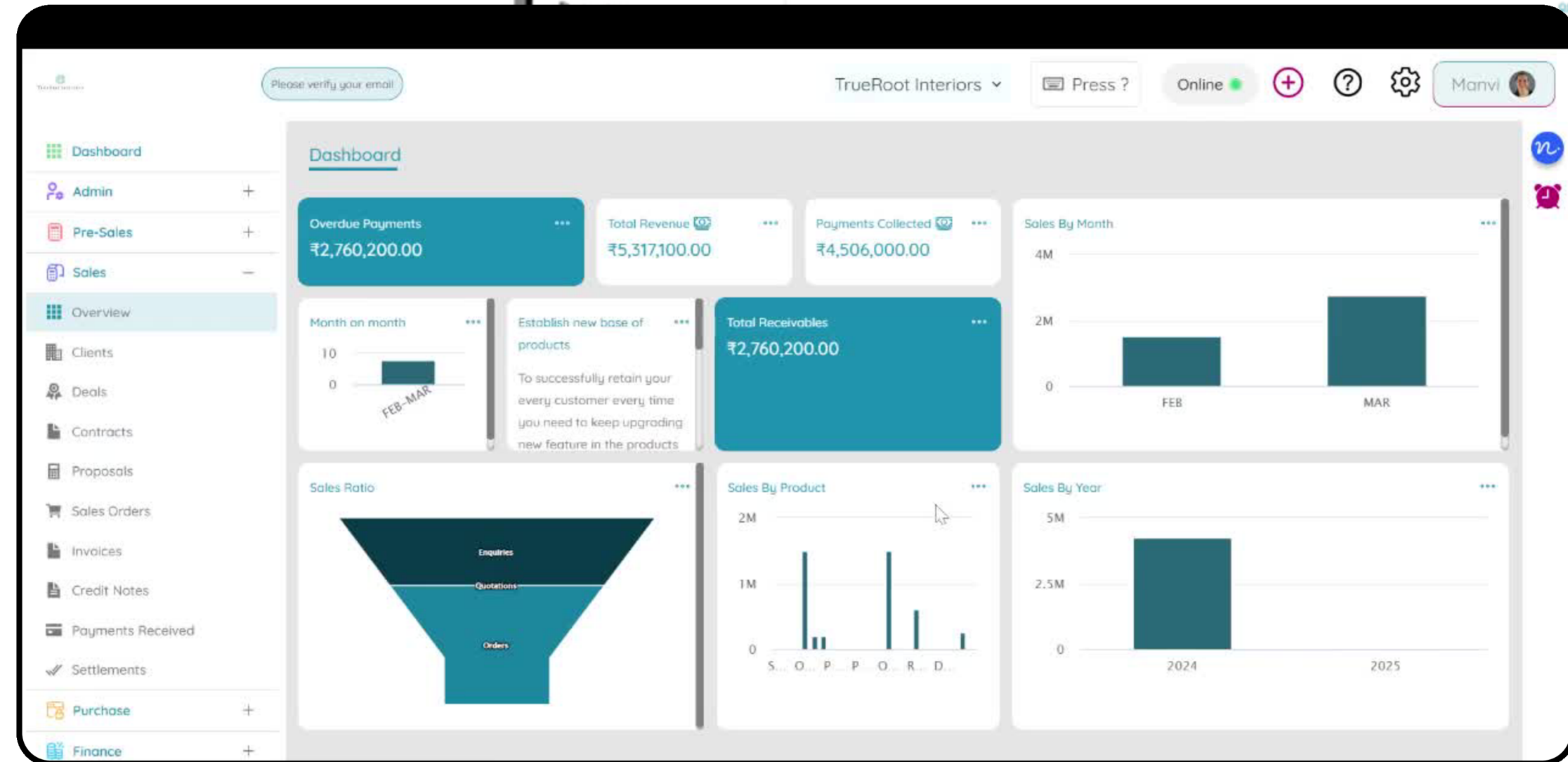
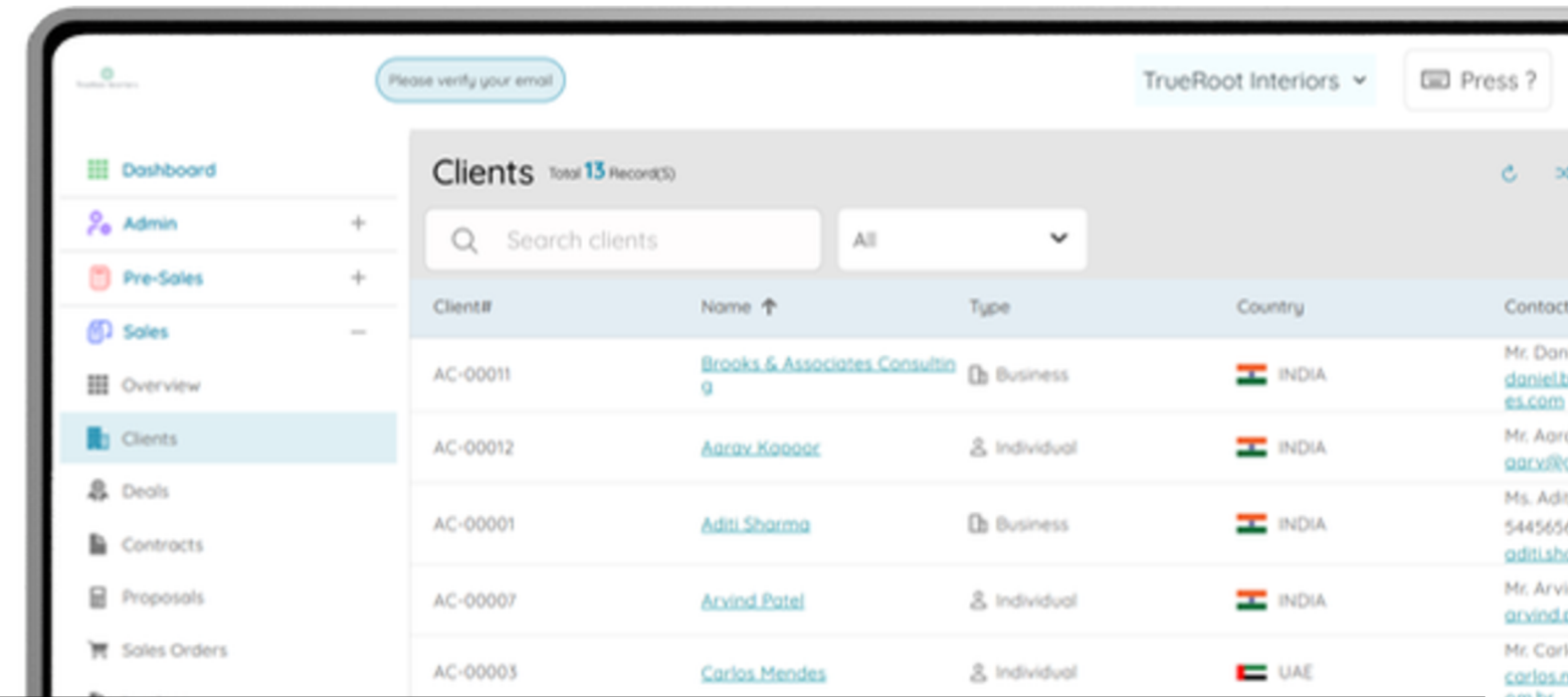
Automate & Optimize Your Sales Workflow





Automate & Optimize Your Sales Workflow

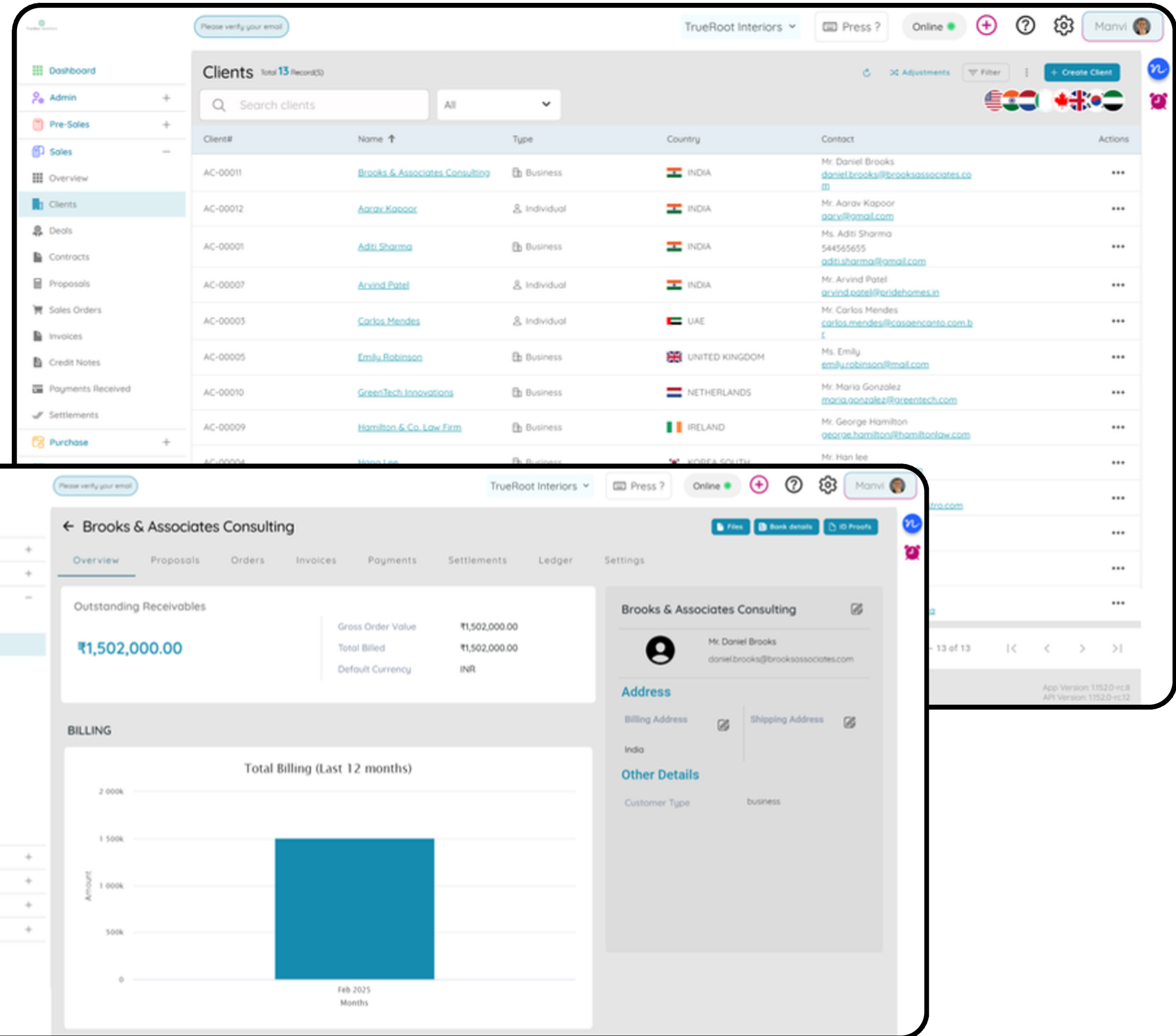
- Centralized client details and deal management.
- Track every step of the sales lifecycle, from proposal creation to payment settlement.
- Gain full visibility into your sales pipeline with real-time reporting.



Client Management – A Centralized Sales Hub

Organize & Track Every Client Interaction

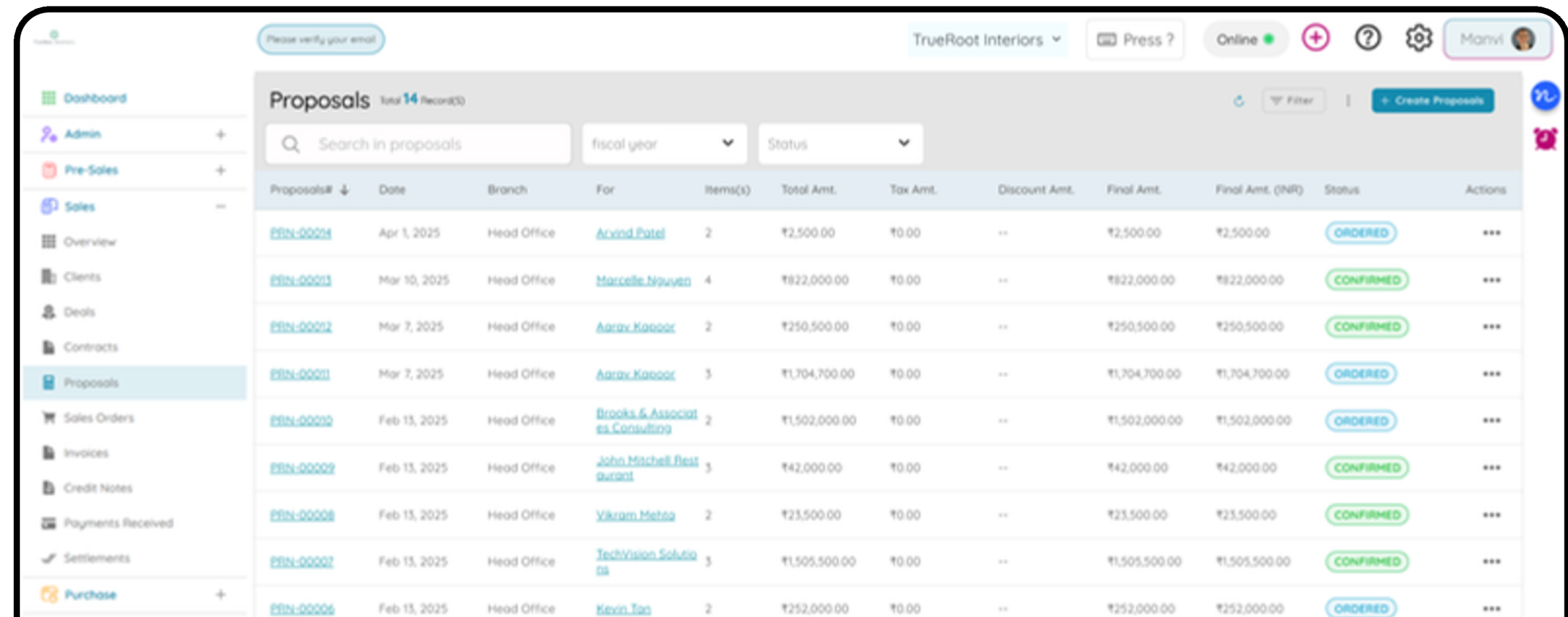
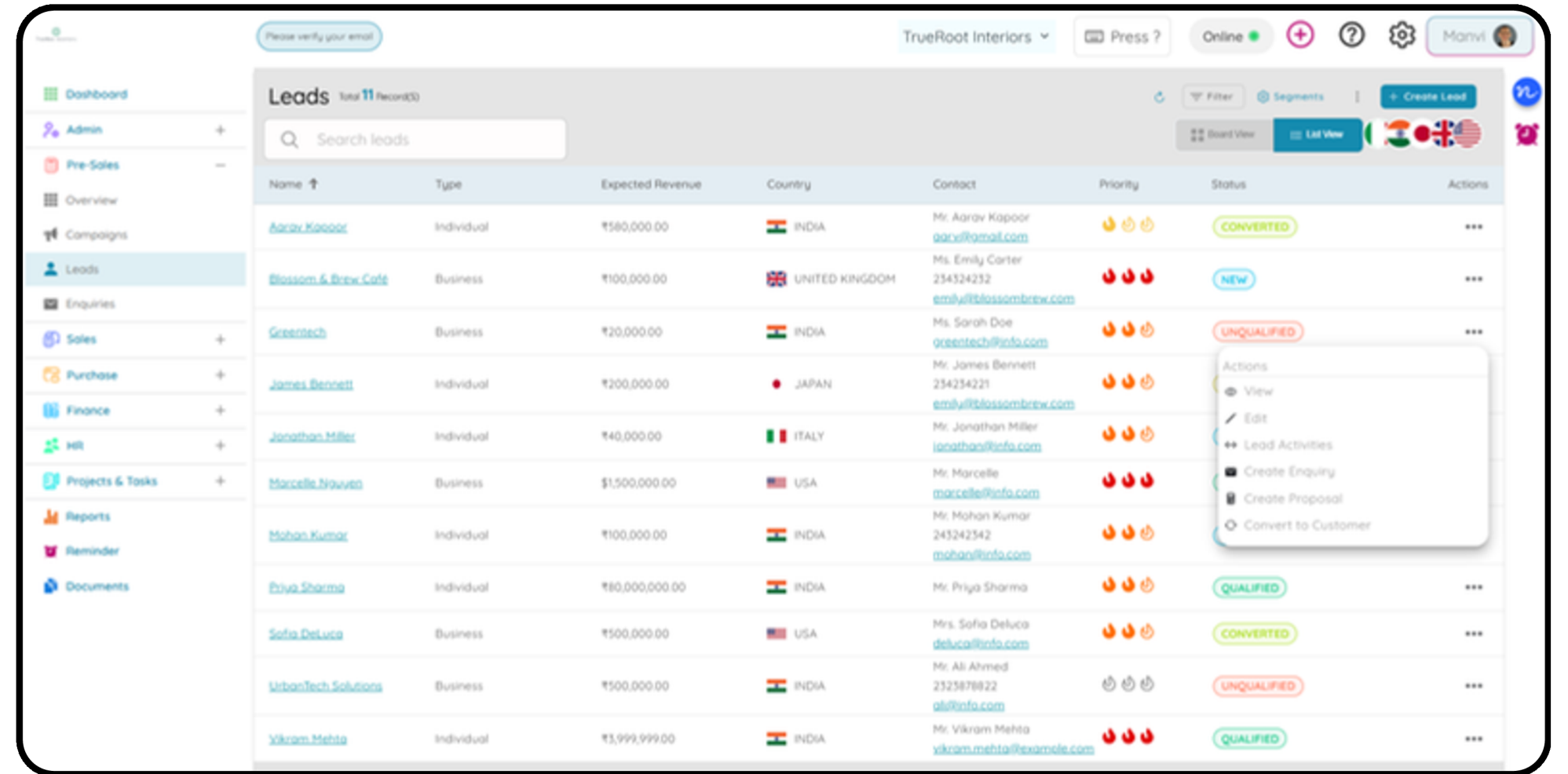
- Store & Access Client Details: Maintain contact info, transaction history, and tax preferences.
- Manage Deals & Contracts: Seamlessly track negotiations and agreement details.
- Ensure Smooth Transactions: Set custom tax rules and discount structures per client.



Proposal Creation – Convert Leads Faster

Generate Professional
Proposals with Flexible Options

- Quickly Create & Customize: Add pricing, taxes, and discounts in just a few clicks.
- Track Proposal Status: Monitor accepted, rejected, or pending proposals.
- Instant Conversion: Convert approved proposals into sales orders effortlessly.

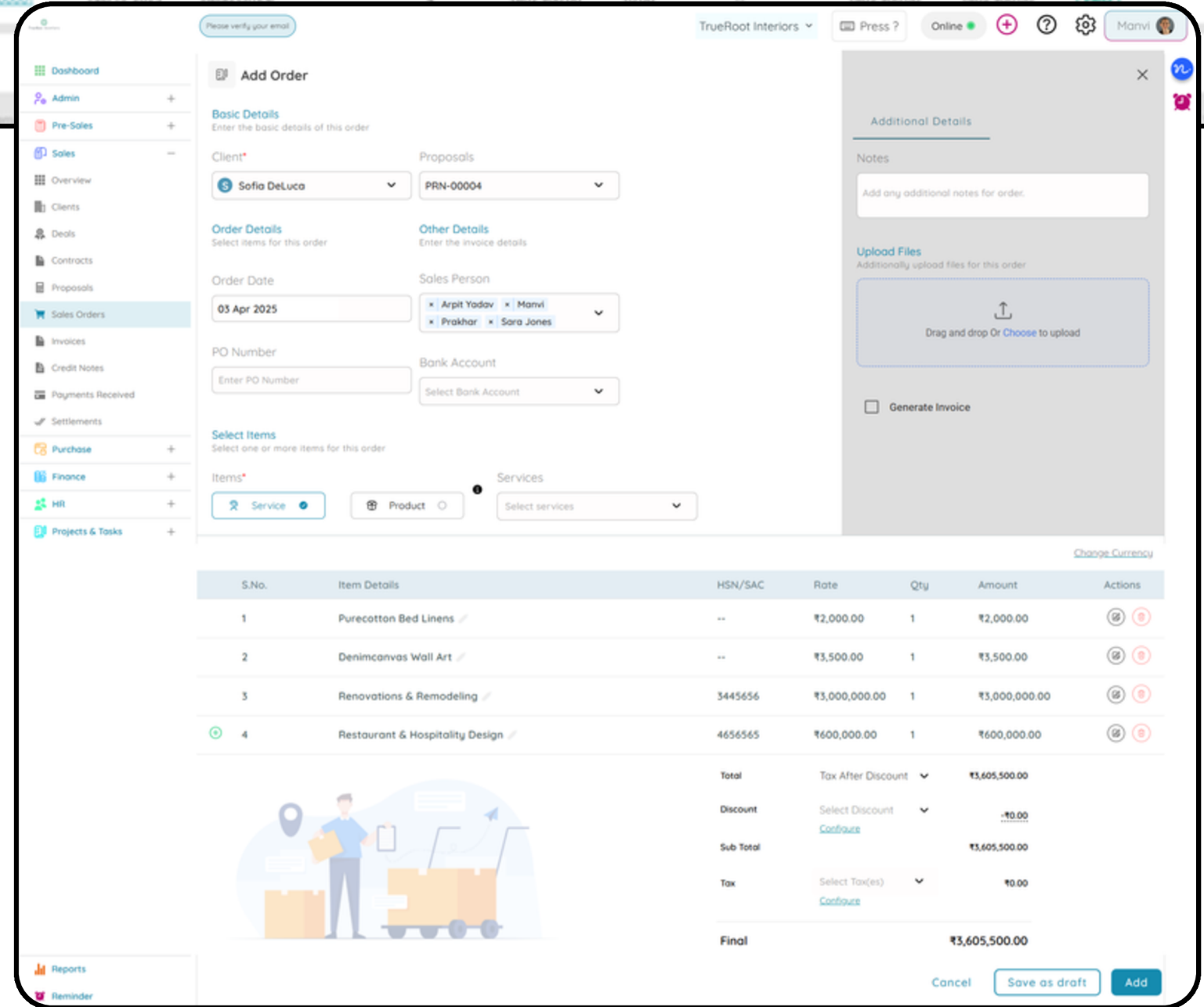
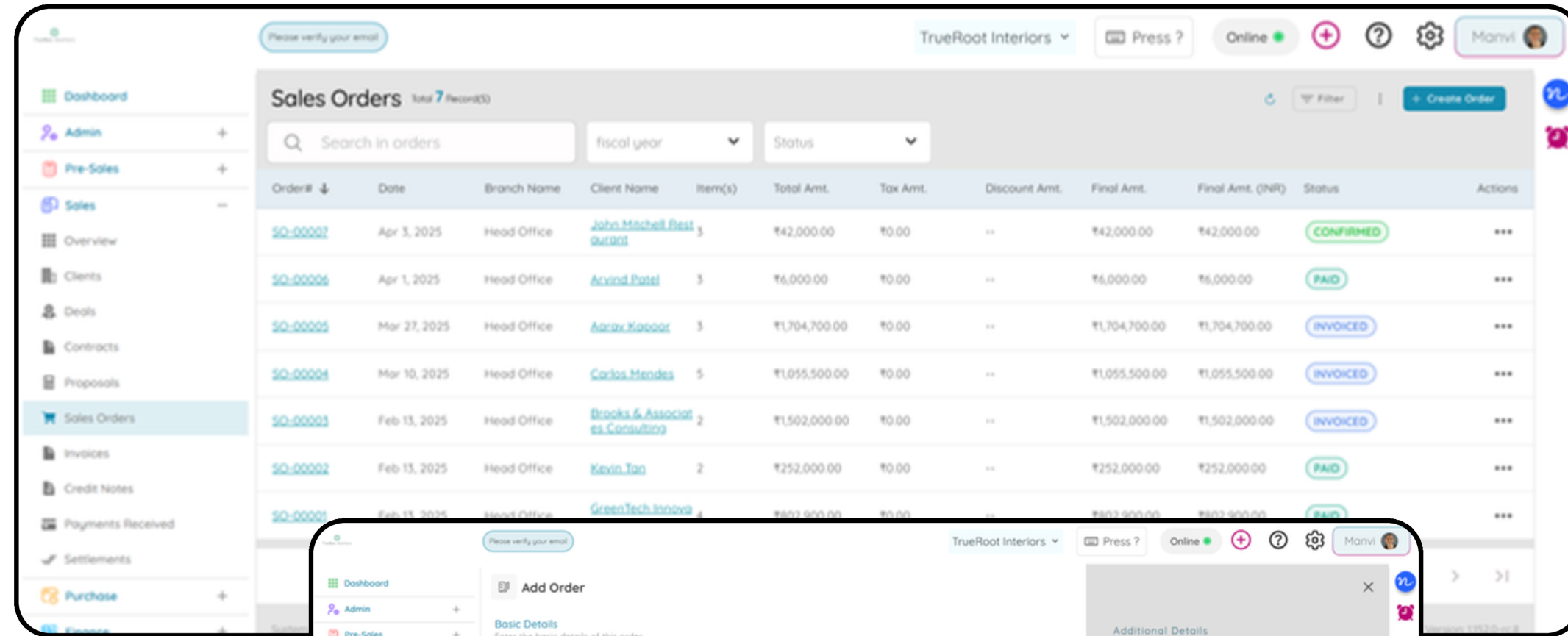




Sales Order – From Draft to Confirmation

Configure Sales Orders with Tax & Discount Flexibility

- Apply Custom Discounts & Tax Rates: Handle GST, VAT, and region-specific tax calculations.
- Auto-Calculate Totals: Ensure accurate pricing with tax-inclusive or exclusive options.
- Draft, Confirm, or Invoice Orders: Stay in control at every stage of the sales process.

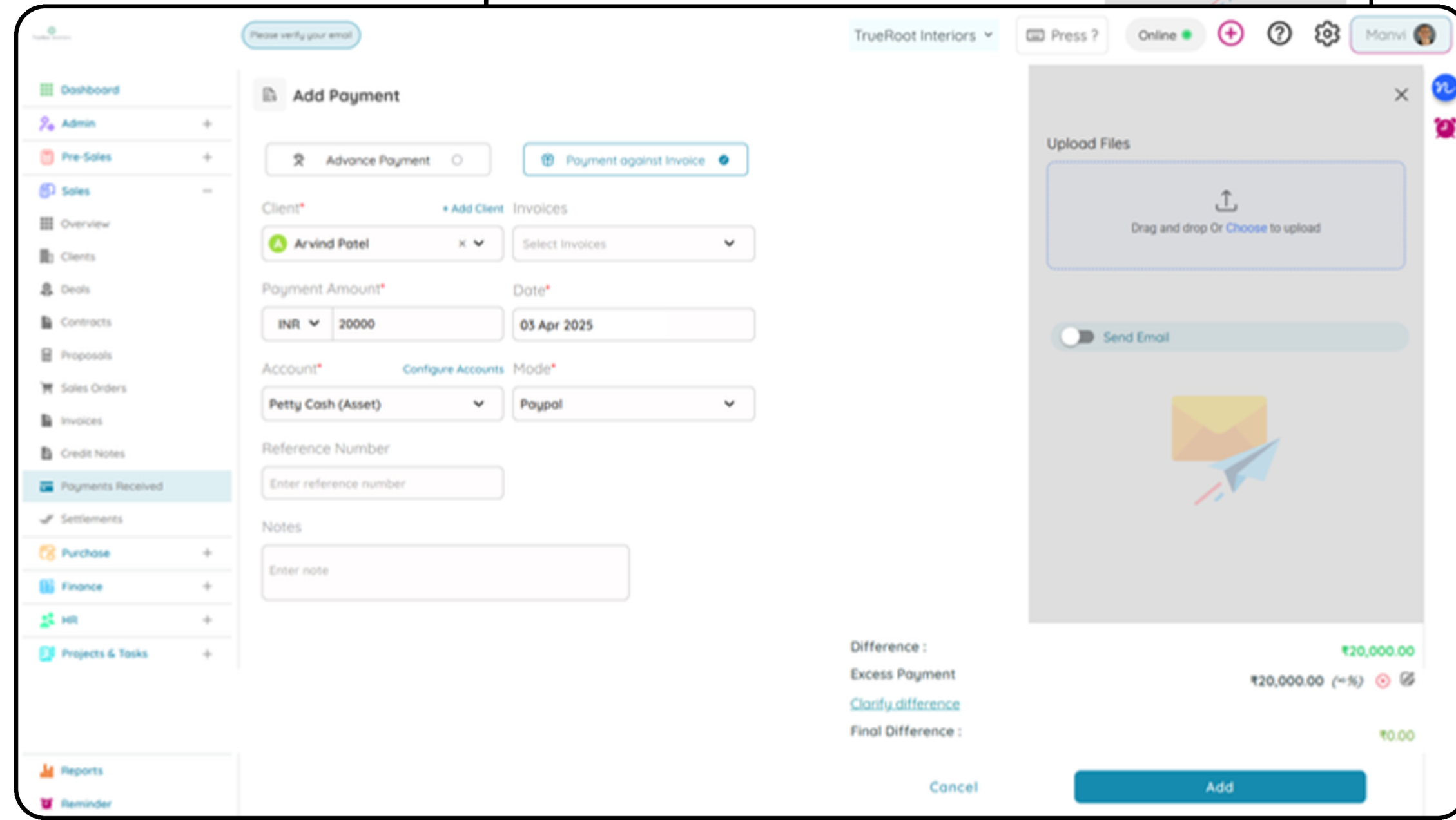
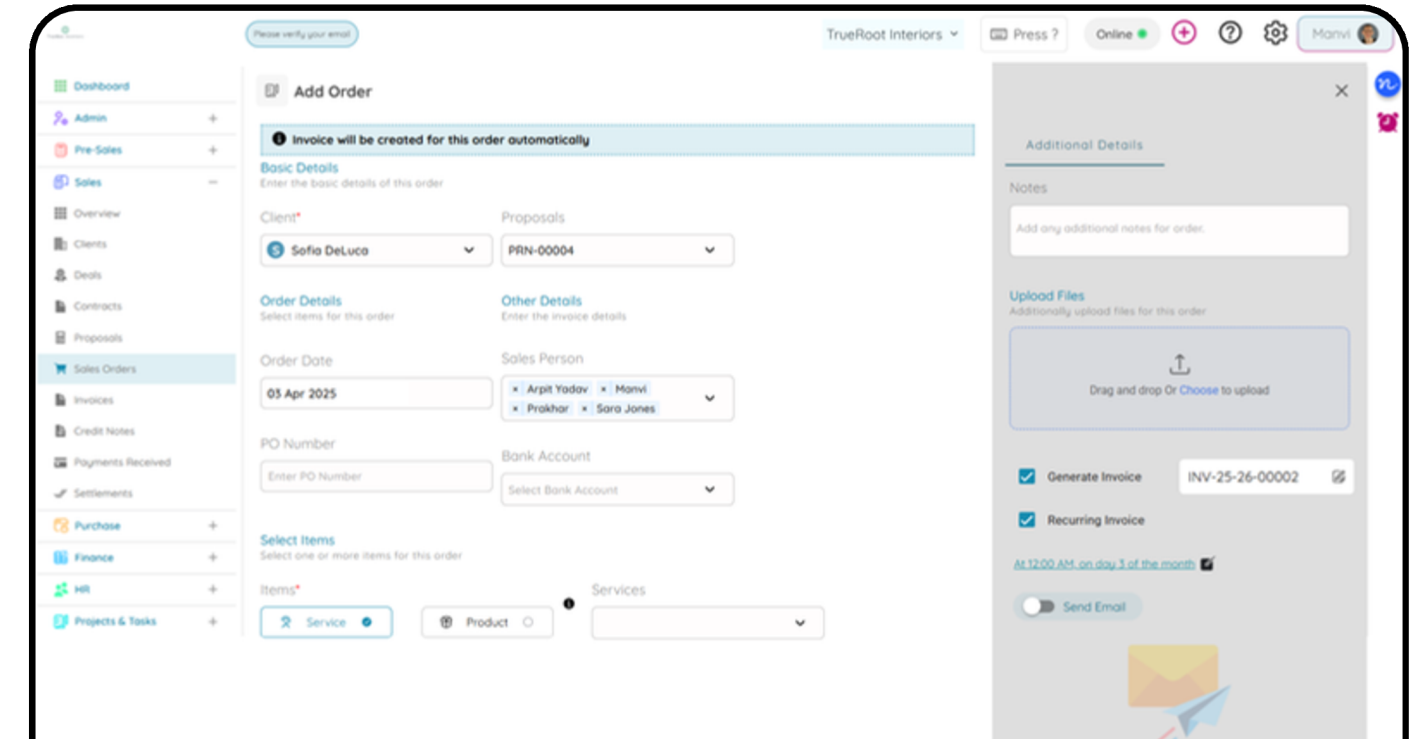




Smart Invoicing – Recurring & Easy Payments

Automate Invoicing with
Recurring & One-Time
Billing

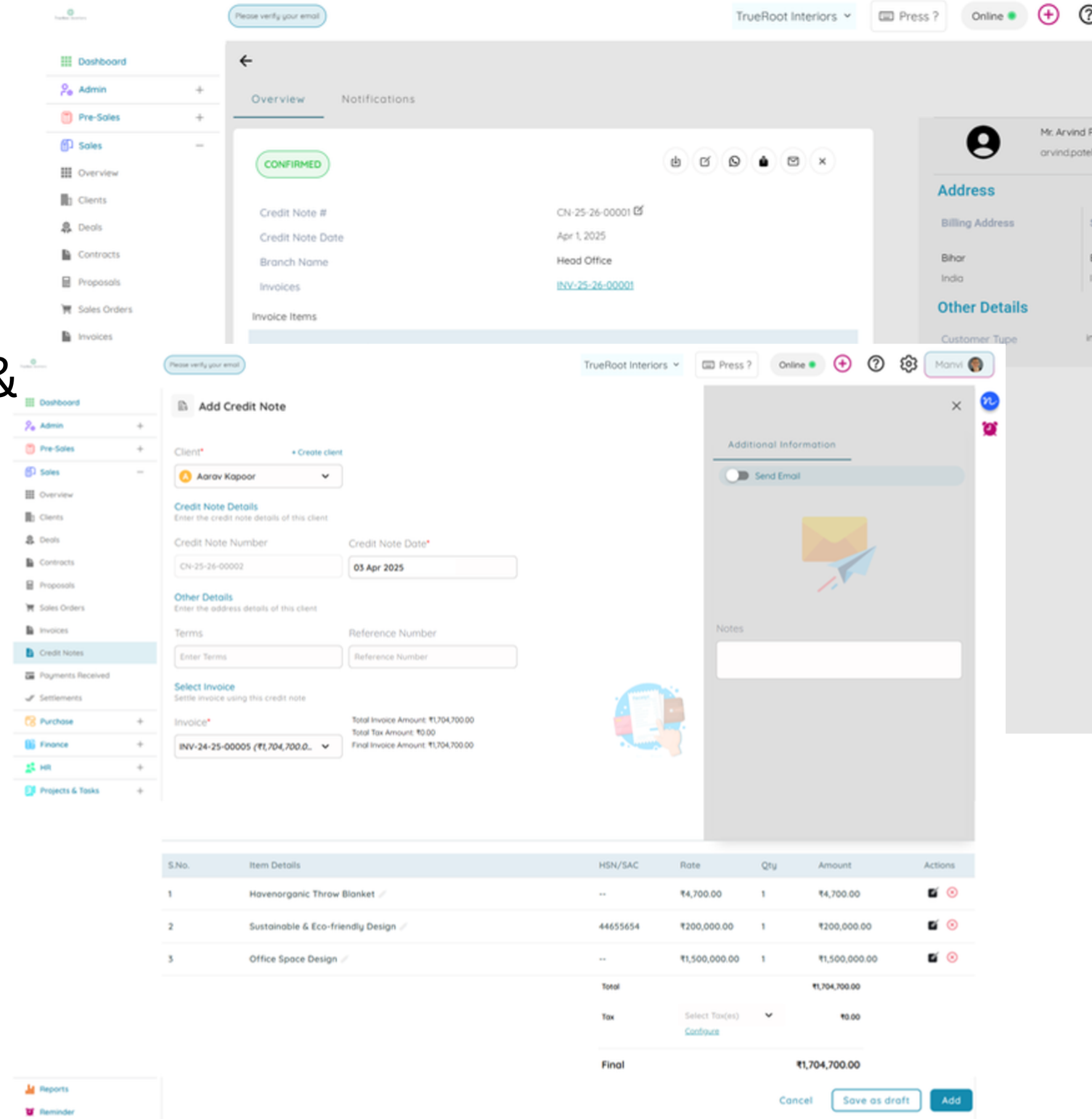
- Generate Full or Partial Invoices: Control invoicing per milestone or full payment.
- Set Up Recurring Invoices: Automate subscriptions, retainers, or monthly billing.
- Tax & Discount Management: Configure tax-inclusive, tax-exclusive, or custom discounts.



Credit Notes – Handle Adjustments Efficiently

Manage Refunds, Short/Excess Payments & Adjustments

- Generate Credit Notes: Easily process refunds or damaged goods adjustments.
- Short/Excess Payment Handling: Auto-adjust balances based on over/under payments.
- Sync with Invoices: Maintain financial accuracy by linking credit notes to invoices.



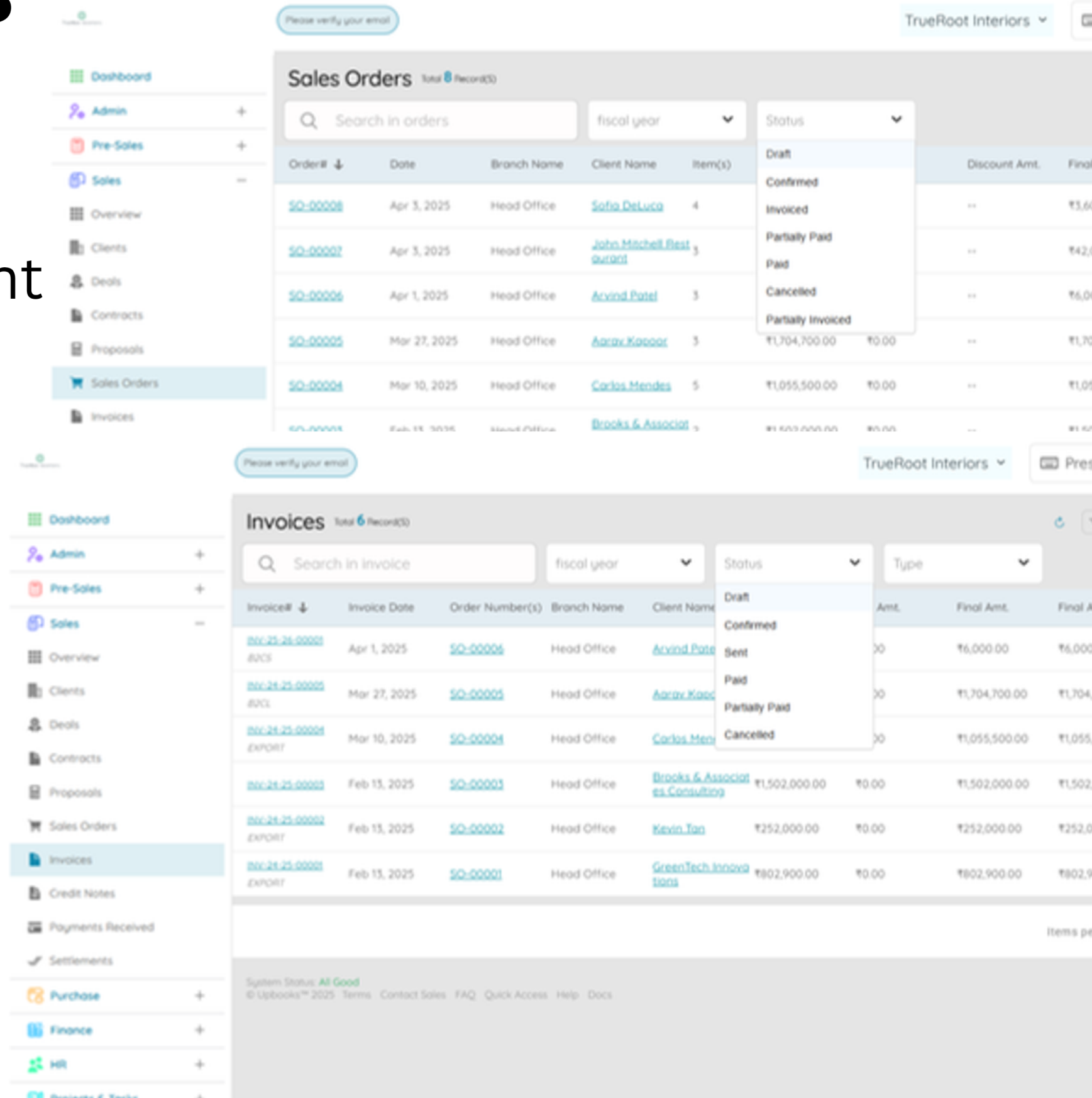
The screenshot displays the upbooks software interface for managing credit notes. It includes a sidebar menu with options like Dashboard, Admin, Pre-Sales, Sales, Overview, Clients, Deals, Contracts, Proposals, Sales Orders, and Invoices. The main content area shows a 'CONFIRMED' credit note for client 'Aarav Kapoor' with details such as Credit Note # (CN-25-26-00001), Date (Apr 1, 2025), and Branch (Head Office). Below this, there is a form to 'Add Credit Note' with fields for Client, Credit Note Number, Date, Terms, Reference Number, and Invoice selection. A table at the bottom lists items being credited, including 'Havenorganic Throw Blanket', 'Sustainable & Eco-friendly Design', and 'Office Space Design', with their respective rates and amounts. The total amount is ₹1,704,700.00.

S.No.	Item Details	HSN/SAC	Rate	Qty	Amount	Actions
1	Havenorganic Throw Blanket	--	₹4,700.00	1	₹4,700.00	[Icon]
2	Sustainable & Eco-friendly Design	44655654	₹200,000.00	1	₹200,000.00	[Icon]
3	Office Space Design	--	₹1,500,000.00	1	₹1,500,000.00	[Icon]
Total					₹1,704,700.00	
Tax					Select Tax(es) ₹0.00	
Final					₹1,704,700.00	

Sales Order & Invoice Status – End-to-End Tracking

Gain Full Visibility on Every Order & Payment

- Track Sales Order Status: See real-time updates from draft to confirmed to invoiced.
- Monitor Payment Progress: Get notified on overdue payments, partial payments, and settlements.
- Auto-Update Invoice Status: Reflect paid, pending, or partially paid status instantly.



The image displays two screenshots of the upbooks software interface. The top screenshot shows the 'Sales Orders' section, and the bottom screenshot shows the 'Invoices' section. Both sections feature a sidebar navigation menu on the left and a main content area with a table of records and a status dropdown menu.

Sales Orders Section:

- Search: Search in orders
- Filters: fiscal year, Status
- Table Columns: Order#, Date, Branch Name, Client Name, Item(s), Discount Amt., Final Amt.
- Table Data:

Order#	Date	Branch Name	Client Name	Item(s)	Discount Amt.	Final Amt.
SO-00008	Apr 3, 2025	Head Office	Sofia DeLuca	4	--	\$3,600.00
SO-00007	Apr 3, 2025	Head Office	John Mitchell Best	3	--	\$42,000.00
SO-00006	Apr 1, 2025	Head Office	Arvind Patel	3	--	\$6,000.00
SO-00005	Mar 27, 2025	Head Office	Aravind Kooor	3	\$1,704,700.00	\$0.00
SO-00004	Mar 10, 2025	Head Office	Carlos Mendes	5	\$1,055,500.00	\$0.00
- Status Dropdown: Draft, Confirmed, Invoiced, Partially Paid, Paid, Cancelled, Partially Invoiced

Invoices Section:

- Search: Search in invoice
- Filters: fiscal year, Status, Type
- Table Columns: Invoice#, Invoice Date, Order Number(s), Branch Name, Client Name, Amt., Final Amt., Final A
- Table Data:

Invoice#	Invoice Date	Order Number(s)	Branch Name	Client Name	Amt.	Final Amt.	Final A
INV-24-25-00001	Apr 1, 2025	SO-00006	Head Office	Arvind Patel	\$0	\$6,000.00	\$6,000.00
INV-24-25-00005	Mar 27, 2025	SO-00005	Head Office	Aravind Kooor	\$0	\$1,704,700.00	\$1,704,700.00
INV-24-25-00004	Mar 10, 2025	SO-00004	Head Office	Carlos Mendes	\$0	\$1,055,500.00	\$1,055,500.00
INV-24-25-00003	Feb 13, 2025	SO-00003	Head Office	Brooks & Associates Consulting	\$1,502,000.00	\$0.00	\$1,502,000.00
INV-24-25-00002	Feb 13, 2025	SO-00002	Head Office	Kevin Tan	\$252,000.00	\$0.00	\$252,000.00
INV-24-25-00001	Feb 13, 2025	SO-00001	Head Office	GreenTech Innovations	\$802,900.00	\$0.00	\$802,900.00
- Status Dropdown: Draft, Confirmed, Sent, Paid, Partially Paid, Cancelled

System Status: All Good
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Payment Tracking – Multiple Modes & Adjustments

Track & Reconcile Payments with Short/Excess Handling

- Accept Various Payment Methods: UPI, credit cards, bank transfers, or cash.
- Handle Short & Excess Payments: Auto-adjust invoices for under/overpayments.
- Monitor Real-Time Payment Status: View partially paid, fully paid, or pending invoices.

The screenshot displays the upbooks software interface. On the left is a navigation sidebar with options like Dashboard, Admin, Pre-Sales, Sales, Overview, Clients, Deals, Contracts, Proposals, Sales Orders, Invoices, and Credit Notes. The main area is split into two panels. The top panel is the 'Add Payment' form, which includes fields for Client (Brooks & Associates Co.), Payment Amount (INR), Date (03 Apr 2025), Account (Petty Cash (Asset)), and Mode (UPI). The bottom panel is the 'Invoices' table, which lists various invoices with columns for Invoice#, Invoice Date, Order Number(s), Branch Name, Client Name, Status, Type, Amt., Final Amt., Final Amt. (INR), and Due Date. A dropdown menu is open over the 'Status' column, showing options like Draft, Confirmed, Sent, Paid, Partially Paid, and Cancelled.

Invoice#	Invoice Date	Order Number(s)	Branch Name	Client Name	Status	Type	Amt.	Final Amt.	Final Amt. (INR)	Due Date
INV-25-00001	Apr 1, 2025	SO-00004	Head Office	Arvind Patel	Draft					
INV-25-00002	Mar 27, 2025	SO-00005	Head Office	Aarav Khandelwal	Confirmed		₹6,000.00	₹6,000.00	₹6,000.00	Apr 1, 2025
INV-25-00003	Mar 10, 2025	SO-00004	Head Office	Carlos Mendez	Sent		₹1,704,700.00	₹1,704,700.00	₹1,704,700.00	Mar 27, 2025
INV-25-00004	Feb 13, 2025	SO-00003	Head Office	Brooks & Associates Consulting	Paid		₹1,502,000.00	₹1,502,000.00	₹1,502,000.00	Feb 13, 2025
INV-25-00005	Feb 13, 2025	SO-00002	Head Office	Kevin Tan	Partially Paid		₹252,000.00	₹252,000.00	₹252,000.00	Feb 13, 2025
INV-25-00006	Feb 13, 2025	SO-00001	Head Office	GreenTech Innovations	Cancelled		₹802,900.00	₹802,900.00	₹802,900.00	Feb 13, 2025

Reporting & Analytics – Smarter Sales Insights

Make Data-Driven Decisions
with Advanced Reports

- Track Revenue & Taxes: Monitor tax collections, discount impact, and overall revenue.
- Identify Payment Trends: Spot short/excess payments and recurring billing performance.
- Custom Sales Reports: Generate insights per client, invoice, or product category.





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!



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