

Spreadsheet-Based ERP Product Memo

Vision

A lightweight, spreadsheet-based ERP system replacing legacy inventory systems for any sized business. Fast, intuitive, and easy to use for non-technical staff while retaining data cleaning/automation power.

Why Customers Will Love It

Customer Problem	Proposed Process
Currently all systems generate CSVs and the customer has to manually concatenate them together for functions like creating a PO	Systems like CIN7 and Shopify will synchronize and clean data automatically. View-ready spreadsheets will be generated and updated regularly.
Each system is different and training a employee for a new tool takes week for them to perform tasks without supervision	Workflows are in Excel-like spreadsheets, which is familiar to those who use Google Sheets or Excel.
Data cleanup has to be performed every time a new CSV is downloaded.	Routine data cleaning for live sources is performed based on specific parameters. Sending notifications for when something needs attention.
Data validation is not done regularly for databases, errors only show up/fixed when that information is accessed.	Routine data cleaning for databases is performed.

Key product requirements for this tool to be built as a web application that could be sold to other customers

- Integration into existing systems
- Inventory Management
- Vendor Management
- Sales Orders & Purchase Orders Management
 - Customer → ERP → vendor paperwork/flow
 - Communication tracking
- Reporting & Analytics
 - Sharable standard reports
 - Dashboard with live update

Visual Sketches

- Metrics/summary/items that need attention
 - Dashboard showing low-stock SKUs for proactive purchasing

The dashboard features a navigation bar with tabs: Dashboard, Inventory, Orders, Customers, Suppliers, and Purchase Orders. The Dashboard tab is active.

Key Metrics:

- Total Revenue: \$5520.78 (This month, +12.5%)
- Total Orders: 4 (1 pending)
- Low Stock Items: 1 (Need reordering)
- Active Customers: 3 (Total customers)

Recent Orders:

Order ID	Customer	Total	Status
FLY-001	Rocky Mountain Outfitters	\$2845.95	Completed
FLY-002	Yellowstone Fly Fishing Co.	\$1599.90	Processing
FLY-003	Driftless Angler	\$749.97	Shipped
FLY-004	High Country Flies	\$324.96	Pending

Low Stock Alert:

SKU	Description	Stock Level	Min Level
NET006	Fishpond Nomad Native Net	3 left	Min: 6

- Table-based interface with:
 - Searchable SKU master
 - "Generate PO" tab – auto populated
 - PO summary modal

The Purchase Orders tab is active.

Purchase Order Management:

Create and manage purchase orders with suppliers

Actions:

- + Create Purchase Order
- Auto-Generate from Low Stock

Search:

Search... (with a magnifying glass icon)

Table Headers:

PO Number	Supplier	Date Created	Expected Delivery	Status	Total	Items	Actions
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Table Data:

PO-2024-001	Sage Fly Fishing	2024-01-20	2024-02-05	Sent	\$4475.00	5 items	
PO-2024-002	Montana Fly Company	2024-01-21	2024-01-28	Received	\$499.80	20 items	
PO-2024-003	Fishpond USA	2024-01-22	2024-02-10	Draft	\$1079.70	6 items	