

## Founders Workspace – ERP System

**By:** PTS – Pawar Technology Services

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### **Page 1: Cover Page**

**Title:** Founders Workspace ERP

**Subtitle:** Streamline Operations. Manage Resources. Grow Efficiently.

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### **Page 2: ERP System Overview**

Founders Workspace ERP is an integrated platform to manage your company's inventory, orders, clients, employees, and financial transactions.

It replaces multiple disconnected tools with one unified dashboard, enabling smooth and efficient business operations.

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### **Page 3: Login & Dashboard**

- **Login Page:** Secure access via email and password
  - **Dashboard:** Central control panel showing:
    - Total Invoices Generated
    - Total Revenue
    - Total Leads & Clients
    - Quotes Overview
    - Analytics & Performance Charts
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### **Page 4: Lead & Client Management**

- Add and manage leads with essential details
- View, delete, import, and export leads
- Central repository of client information with name, email, phone, company, and address
- Link clients to invoices, orders, and projects

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### **Page 5: Invoice & Payment Management**

- Create, save, and export professional invoices
- Fields include invoice number, client info, product/service details, issue and due dates, total amount, and payment status
- Track payments by date, amount, and mode (bank, cash, UPI, etc.)
- Export data for accounting and audit

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### **Page 6: Orders & Product Management**

- Real-time order listing and tracking
- Status updates: Pending, Shipped, Delivered
- Product catalog with images, prices, categories, and descriptions
- Product categories for easy filtering and organization
- Manage vendor and partner companies

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### **Page 7: Reports & Analytics**

- Comprehensive reports on paid/unpaid invoices
- Lead and client statistics
- Graphical payment trends
- Monthly and cumulative data views
- Helps with forecasting and strategic decisions

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### **Page 8: Chat Assistant & Custom Forms**

- Integrated chat assistant for help and navigation
  - Custom lead form builder for business-specific data collection
  - Easy access from all screens
  - User-friendly and intuitive interface
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## **Page 9: Settings & Security**

- User and admin management
  - Logout and session controls
  - Potential for notification and access controls (expandable)
  - Secure and personalized environment
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## **Page 10: Why Choose Founders Workspace ERP?**

- All-in-one platform with CRM & Billing integration
- Cloud-based with access from anywhere
- Scalable modules tailored for your business
- User-friendly and designed for business growth