

# Pothera Lite

ERP SOFTWARE FOR  
DISTRIBUTORS & WHOLESALERS

ERP SOFTWARE FOR GROWTH-ORIENTED  
DISTRIBUTORS & WHOLESALERS

# STILL RUNNING YOUR BUSINESS THE INEFFICIENT WAY?

Do you face challenges in managing orders and shipments without a centralized solution?



Are you struggling to track sales trends and customer behaviour without data management?



Do you encounter errors and delays in processing orders due to manual data entry?



Are you finding it challenging to communicate effectively with suppliers & customers?

Are you experiencing difficulties in managing financial transactions and tracking expenses?



Do you face compliance issues and risk errors in regulatory reporting?



Are you struggling to scale your business and meet growing demands?



Do you face inventory stockouts or overstocks because of inaccurate demand forecasting?

The background features a light gray, semi-transparent image of a hand on the left side, holding a small gear. Several other gears of varying sizes are scattered across the background, creating a mechanical theme. The overall color palette is soft and professional, with light grays and a touch of blue and orange from the logo.

ALL YOUR PROBLEMS  
HAVE **ONE AFFORDABLE  
& EFFICIENT SOLUTION**

**Pothera** *Lite*

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A decorative element consisting of a series of small gray dots forming a curved path that leads to a solid gray downward-pointing arrowhead.

## INTRODUCING

**Pothera** Lite

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## YOUR PARTNER IN PROGRESS

**Pothera Lite for Distributors & Wholesalers** is your comprehensive solution for managing every aspect of your business with ease and efficiency. From **accounting** and **financials to purchasing, inventory, sales, customer relationships, warehouse management,** and even **analytics & reporting** – it's all seamlessly integrated into one powerful platform.

Picture this: you're a growing business with big dreams and even bigger goals. But as you expand, keeping tabs on every facet of your operation becomes increasingly complex. That's where Pothera Lite steps in, tailored specifically for mid-size distribution businesses like yours.





## IT'S THE EDGE YOUR BUSINESS NEEDS

What makes Pothera Lite different & better? Flexibility, customisability, and sheer power combined with an intuitive interface that simplifies every task. With Pothera Lite, streamlining processes and gaining invaluable insights into your business is effortless. Get real-time information at your fingertips, enabling you to make informed decisions swiftly and drive profitable growth with confidence.

Unlock the power of seamless distribution management with Pothera Lite; with its power, all your departments seamlessly connect, processes automate effortlessly, and errors diminish while productivity soars.

**With Pothera Lite, you're not just managing your business - you're orchestrating a symphony of efficiency, profitability, and growth.**



**Simplify Supply Chain Complexities** with easy collaboration and automatic data sharing with vendors, enabling proactive problem-solving and trend identification.

**Streamline Financial Operations** with automated accounting tasks, cash flow management, and real-time comparisons of actuals versus plans for instant insights into your financial standing.

**Explore New Revenue Streams** with support for innovative business models and customer-centric services, such as sales management, etc.

**Pothera Lite**  
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**Gain Precise Inventory Visibility** down to the shelf and bin, ensuring swift and accurate picking, packing, and shipping for enhanced customer satisfaction.

**Seamlessly Connect All Departments** and automate processes for heightened productivity and reduced errors.

In essence, Pothera Lite isn't just a software - it's your strategic partner in navigating the challenges of growth, ensuring that as your business flourishes, so does your efficiency and profitability.

## ADVANTAGES THAT ADD VALUE



### AFFORDABILITY

It offers cost-effective solutions suitable for SME or startups with limited budgets. It typically comes with subscription-based pricing models or affordable one-time license fees.



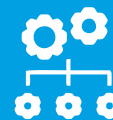
### EASE OF IMPLEMENTATION AND USE

It prioritizes simplicity in both implementation and user interface design. It is quicker to deploy compared to traditional ERP systems, often requiring minimal IT expertise. Additionally, intuitive interface makes it easier for employees to adapt to and utilize the software efficiently.



### SCALABILITY

While being light in terms of resource usage, it is designed to scale alongside growing businesses. It provides flexibility to add or remove modules based on evolving business needs without significant disruptions.



### MODULAR STRUCTURE

It adopts a modular approach, allowing businesses to select and integrate only the functionalities they require. This flexibility enhances customization options, enabling companies to tailor the ERP system to their specific workflows and processes.



#### CLOUD-BASED ACCESSIBILITY

It is cloud-based, offering anytime, anywhere access to critical business data. This accessibility fosters collaboration among remote teams and facilitates real-time decision-making, as users can access the system from various devices with internet connectivity.



#### DATA SECURITY AND COMPLIANCE

It prioritizes data security measures to safeguard sensitive business information. It often complies with industry standards and regulations, providing features like data encryption, access controls, and regular security updates to mitigate risks of data breaches or compliance violations.



#### ANALYTICS AND REPORTING

While focusing on core functionalities, it offers robust analytics and reporting features. It enables businesses to derive actionable insights from their data, facilitating informed decision-making and strategic planning.

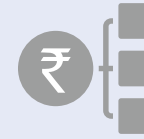
# HEAVY-WEIGHT MODULES

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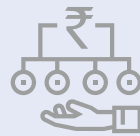
Admin &  
Security  
Management



Finance  
Management



Sales and  
Customer  
Management



Purchase and  
Inventory  
Management



Warehouse  
Management



Supply Chain  
Management



Quality  
Management



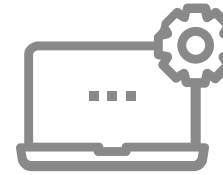
Service  
Management



Business  
Planning  
& Intelligence



Analytics and  
Reporting



## ADMIN & SECURITY MANAGEMENT

The Admin & Security Module in Pothera Lite is designed to provide comprehensive control over user management and system security. It includes features such as User Creation / Settings, which allows administrators to create and configure user accounts with specific settings and preferences. Role Permission functionality enables the definition of roles and assignment of permissions, ensuring that users have access only to the information and functionalities relevant to their roles.



### User Creation / Settings

It allows administrators to create and manage user accounts, including setting up user roles, permissions, and preferences.

### Role Permission

It enables administrators to define roles and assign permissions to users based on their roles, ensuring data security and access control.

### User Log

It tracks and logs user activities within the system, providing the status of user's login actions along with the system IP details.

### Company Master

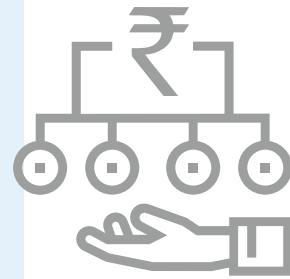
Centralizes information related to company details, such as name, address, contact information, and organizational structure.

### Employee Master

Manages employee information, including personal details, roles, departments, and access levels within the ERP system.

### Document Number Definition

Allows customization and definition of document numbering formats for various transactions and records within the system, ensuring consistency and traceability.



## PURCHASE MANAGEMENT

Purchase Module of Pothera Lite is designed to streamline and manage the procurement process within an organization. It facilitates the entire cycle from requesting quotations to receiving goods or services and making payments to vendors. Key functions of this module include generating Request for Quotation (RFQ) documents to solicit vendor quotes, creating Purchase Orders (POs) for

approved purchases, documenting the receipt of goods through Goods Receive Notes (GRNs), processing vendor invoices for payment through Purchase Invoices, and handling purchase returns, if necessary. These functionalities ensure efficient procurement operations and effective vendor management.

**Request For  
Quotation**

Formal request for pricing and terms from vendors. It records the Quotation request shared to the vendors.

**Purchase  
Return**

Provision for managing the returns of the purchased items (In case of damaged product or excess items received).

**Vendor  
Quotation**

Provision to maintain the record of multiple quotations/offers from a vendor specifying prices, quantities, and terms.

**Direct  
Purchase**

Purchase without going through a formal purchase process i.e. without following the Purchase Indent, Vendor quotation process.

**Purchase  
Order**

Generation of Purchase Order document authorizing a purchase of goods from a vendor.

**Zero Rate  
Purchase**

Purchase without any Price or Taxes (Applicable for Gift/Sample items) where the costing & financials are not affected.

**Goods  
Receive Note**

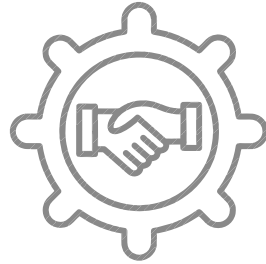
Provision for managing the Record of goods physically received, used for inventory updates.

**Purchase  
Indent**

Provision for managing the returns of the purchased items (In case of damaged product or excess items received).

**Service  
Purchase  
Invoice**

Generation of Bill/Invoice from the vendor for services purchased.



## SALES MANAGEMENT



Sales Module of Pothera Lite focuses on managing the sales process from initial quoting to final invoicing and receipt of payments. It enables organizations to create Sales Quotations to propose prices to customers, convert these into Sales Orders upon acceptance, generate Sales Invoices for billing customers, and manage returns through Sales Return processes. Additionally, the module includes features for handling service orders and invoicing for services rendered. By integrating these functions, the Sales Module helps businesses track sales activities, manage customer relationships, and streamline revenue generation processes.

### Sales Quotation

Generating a Formal Offer to a customer for products or services.

### Sales Challan

Generation of Sales Challan for record of goods dispatched to a customer.

### Sales Return

Process for handling returned goods from customers (In case of damaged or excess items sold)

### Sales Order

Generation of Sales Order for authorizing the sale of goods or services to a customer.

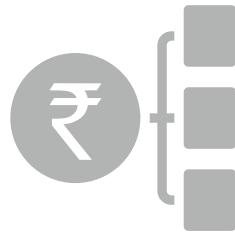
### Sales Invoice

Generation of Bill to the customer for goods or services sold.

### Reports

Various Register reports relevant to the screens/forms provided, Gross Profit Analysis, Sales Target vs Actual, Sales Report (Qtr/Half/Year), Sales 360 Report, etc.





## FINANCE MANAGEMENT

The Finance Module of Pothera Lite system is responsible for managing financial transactions, accounting processes, and financial reporting. It includes features for automated journal entries, processing payments and receipts, managing accounts receivable and accounts payable through debit and credit notes, and reconciling bank statements. Additionally, the module provides tools for generating financial reports, conducting financial analysis,

and ensuring compliance with accounting standards and regulatory requirements. By centralizing financial data and automating financial processes, the Finance Module enhances accuracy, transparency, and control over financial operations within the organization.



**Auto Journal  
Voucher**

Automated entry for financial transactions against the Sales Invoice, Purchase Invoice, Sales Challan, etc.

**AP Debit  
Credit Note**

For managing Adjustment in Accounts Payable due to debit or credit for Vendor.

**Journal  
Voucher**

Manual entry for financial transactions. (An option available for the end users to manually update the entries into the system)

**Knock Off**

Clearing of open transactions between parties (Customer/Vendor).

**Payment  
Entry**

Record of payments made against the invoice (Full/Partial payment), Miscellaneous payments.

**Bank  
Reconciliation**

Matching and reconciling bank statements with Software records.

**Receipt  
Entry**

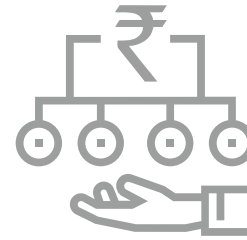
Record of money received against the invoice (Full/Partial receipt) from vendor/customer, Miscellaneous receipt.

**Reports**

Chart of Accounts, Trial Balance, Customer/Vendor Ledger, GST R1, GST R2, GST R3, Bank/Cash Reports, Customer/Vendor Ageing Report, Profit & Loss, Balance Sheet, etc.

**AR Debit  
Credit Note**

For Managing Adjustment in Accounts Receivable due to debit or credit for Customer.



## INVENTORY MANAGEMENT

Inventory Module of Pothera Lite oversees the management of stock levels, materials, and warehouse operations. It allows businesses to track inventory movements, issue materials through Material Issue Slips, transfer stock between locations, and adjust inventory levels as needed. By providing real-time visibility into inventory status, this module enables efficient inventory management, reduces stockouts, and optimizes warehouse operations.

**Material  
Requisition Slip**

Request for materials from inventory and maintaining the records.

**Material  
Issue Slip**

Record of materials taken from inventory for use. It records the details of the item issued and the person details to whom the item is been issued.

**Returnable  
Gate Pass**

Gate Pass generation for items to be send outside and that are expected to be returned to the inventory.  
(Document for returning materials to inventory)

**Non-Returnable  
Gate Pass**

Gate pass generation for items to be send outside and that are not expected to be returned to the inventory  
(Document for materials consumed or not returned)

**Stock  
Transfer**

Moving inventory between locations or departments. (Easy management of the stock movement from one location to another)

**Stock  
Adjustment**

Correcting inventory quantities due to errors or discrepancies. (Stock In and Stock Out for adjustments)

**Reports**

Various reports available for detailed analysis of stock and planning stock management like Stock Ledger Report (Qty), Stock valuation, Stock Transfer, GRN, Item Stock History, Non-moving / Fast-Moving / Slow-Moving Stock, Re-order Level, etc.

## WHY CHOOSE



ERP SOFTWARE FOR  
DISTRIBUTORS & WHOLESALERS

The true power of Pothera Lite lies in its ability to provide comprehensive business management functionalities while being agile, user-friendly, and cost-effective.

Pothera Lite Advantage	Ordinary ERP Software
Tailored for Distributors	One Software Fits All Approach
Cost-Effective Solution	Expensive In Long Run
Quick & Easy to Implement	Complex to Install
Complete Scalability	Rigid Modules
User-Friendly Interface	Non-linear UI/UX
Comprehensive Support	Limited Support
Flexible Integration	Limited Integration

## FLEXIBLE PAYMENT OPTIONS



SAAS & License Based



Per User Based Monthly Subscription

Choose the mode, that best suits your budget and needs!



## HAVE A QUERY OR A UNIQUE REQUIREMENT?

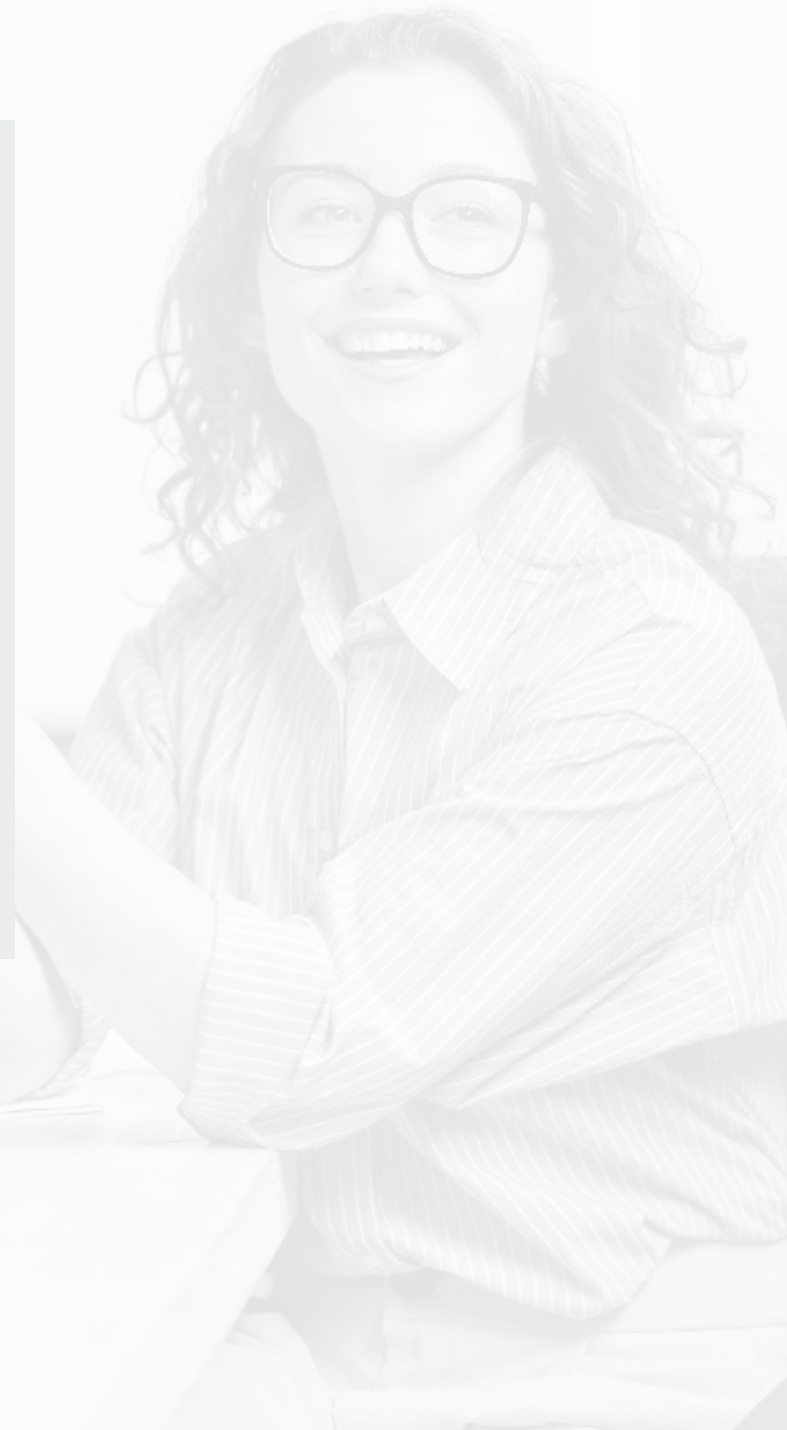
We invite you to have a personalized demo, at your place, at your convenience! Experience firsthand how Pothera Lite can transform your distribution business and take it to new heights of success.

Don't miss out on this opportunity to revolutionize your operations and stay ahead of the competition. Reach out to us now and embark on a journey towards greater efficiency, profitability, and success with Pothera Lite.

**Your business deserves to grow!**

**Pothera** Lite

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IS PRODUCT OF

**bsquare**<sup>®</sup>  
Let's grow...

Established 20 years ago, B-Square Solutions rose from a regional IT company to a multinational business solutions provider and innovator. With its acclaimed products and services, a strong emphasis on R&D, and a richly experienced workforce, it has today become a leading software development company in India.

**20+** years of Software Development

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**50+** Domains Served

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