SWIPFE ERP USER MANUAL

Complete Business Management Solution

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Introduction

Welcome to Swipfe ERP. Swipfe ERP is a flagship product of Swipfe Infotech Private Limited, developed to simplify and modernize enterprise resource planning for businesses of all sizes.

Swipfe ERP streamlines Sales, Inventory, Purchase, Production, Accounts, and HR in one platform.

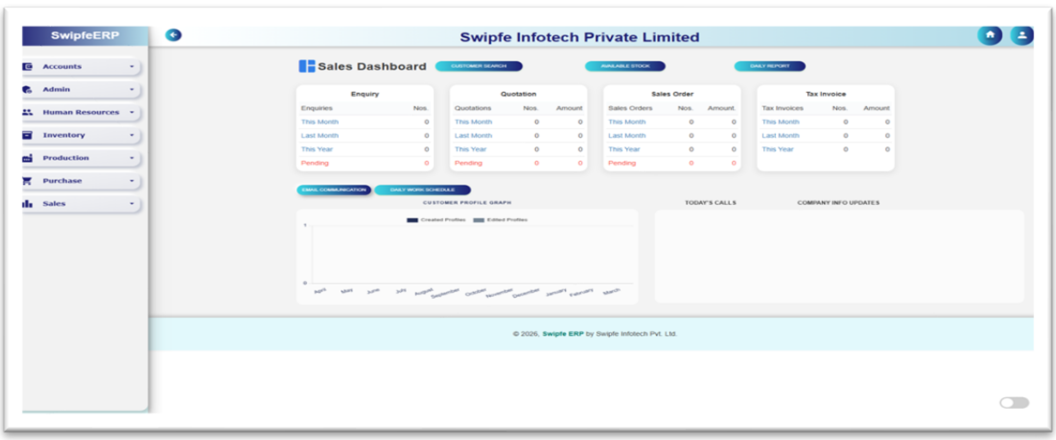
Swipfe ERP is an all-in-one solution for managing core business operations efficiently.

Manage your entire business with Swipfe ERP—Sales, Inventory, Accounts, HR, and more.

Swipfe ERP simplifies business operations with integrated management tools.

Dashboard Overview

The Dashboard serves as the central control panel of Swipfe ERP and provides quick access to Accounts, Admin, Human Resources, Inventory, Production, Purchase, and Sales.



Key Features

- Navigation Menu
- Sales Dashboard Summary
- Customer Search
- Available Stock Overview
- Daily Reports
- Enquiry Statistics
- Quotation Statistics
- Sales Order Statistics
- Tax Invoice Statistics
- Customer Profile Graph
- Today's Calls Section
- Company Updates Section

Modules Overview

The left navigation panel contains:

- Accounts
- Admin
- Human Resources
- Inventory
- Production
- Purchase
- Sales

3.Admin Module

Purpose

Centralize user management, automate audits, monitor system activity, and enforce security policies—manage your organization efficiently from one intelligent admin platform. Assign roles and permissions with ease, track changes in real-time, and ensure compliance across all departments. Gain actionable insights, optimize workflows, and maintain complete control over your organization's operations.

1.Company Configuration

Navigation Path

Admin → Company Configuration

The Company Configuration module is used to define and manage company information and system settings in Swipfe ERP. It ensures data consistency, simplifies ERP setup, supports business growth, and helps align the system with organizational requirements.

Note

Company Configuration should be completed during the initial ERP setup, as this information is used throughout various modules of Swipfe ERP for reporting, documentation, and business operations.

Available Features

- Create Company Configuration
- Search Company Records
- Sort Records
- Page Navigation
- View Company Details
- Edit Company Information

Search and Filter Options

Users can search company records using the following criteria:

- Company Name
- Owner Name
- GSTIN
- Mobile Number
- Email Address
- Address Title
- Address
- Pin code
- State

Additional Filters

- **Find:** Search specific records
- **Order By:** Sort records (A–Z / Z–A)
- **Page:** Select the number of records displayed
- **Page No.:** Navigate to a specific page

Information Displayed

Field	Description
Company Name	Name of the registered company
Owner Name	Name of the company owner or authorized person
Address Title	Type of address (e.g., Registered Office)

Field	Description
Address	Company address details
Pin code	Postal code of the company location
State	State in which the company is located
GSTIN	Company's GST Identification Number
Mobile No.	Official contact number
Email	Official email address
Actions	View and Edit company records

Company Configuration Workflow

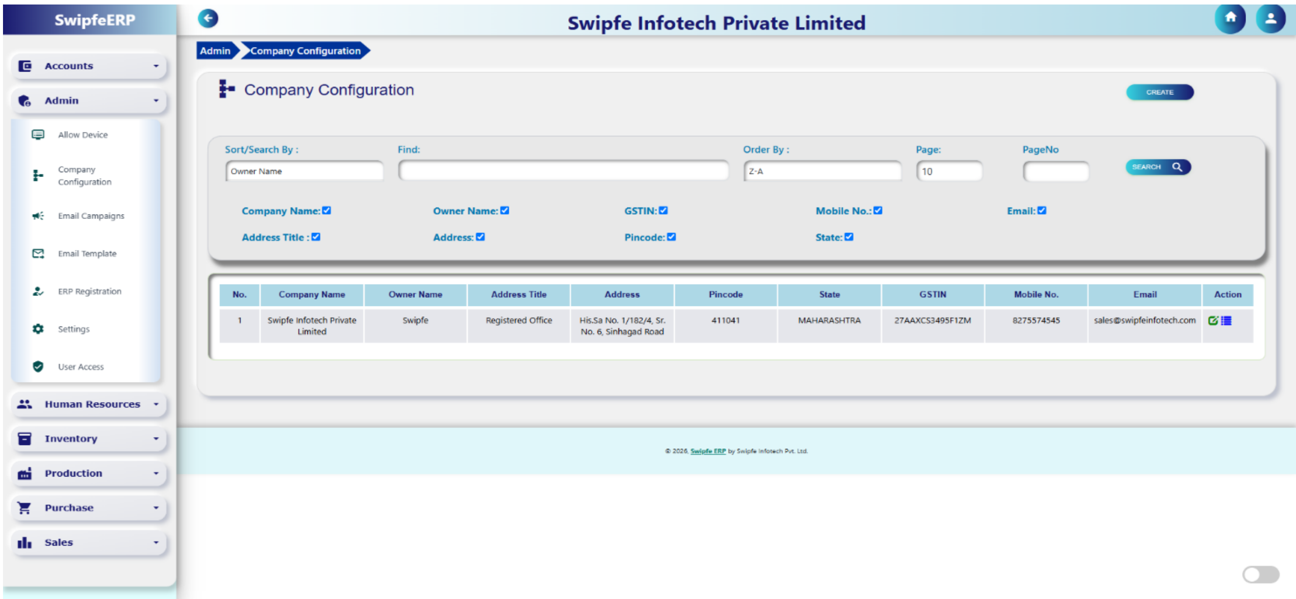
Step 1

Navigate to:

Admin → Company Configuration

Step 2

Click the **Create** button.



Step 3

Enter the required company details:

- Company Name
- Owner Name
- Address Title
- Address

- Pin code
- State
- GSTIN
- Mobile Number
- Email Address

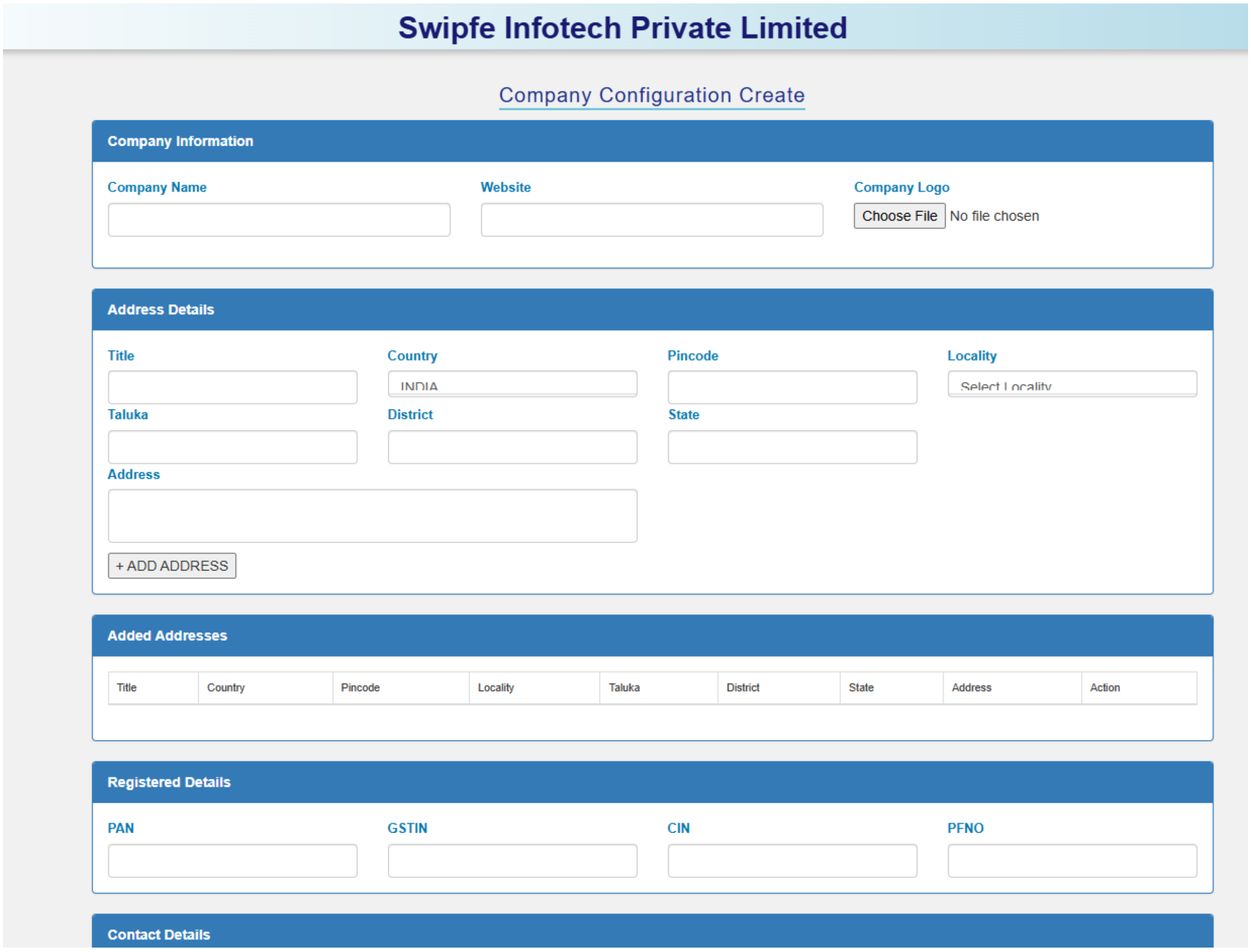
Step 4

Verify the entered information.

Step 5

Click on 

to create the company configuration.



Managing Company Information

View Company Details

1. Open the Company Configuration List.
2. Locate the required company record.

3. Click the **View** icon to review complete details.

Edit Company Details

1. Select the company record.
2. Click the **Edit** icon.
3. Modify the required information.
4. Click **Save** to update the record.

Benefits

- Centralized company information management
- Accurate statutory and contact records
- Easy modification of company details
- Improved data consistency across ERP modules
- Better administrative control

2. Email Campaigns

Navigation Path

Admin → Email Campaigns

Purpose

The **Email Campaigns** module enables organizations to connect effectively with clients through personalized and targeted email communications. It helps promote services and offers, automate marketing workflows, track engagement metrics, and generate campaign performance reports. By supporting bulk email delivery, recipient categorization, and customizable messaging, the module enhances customer engagement, strengthens brand visibility, and drives business growth through effective communication.

Send Email

The Send Email screen allows users to compose and distribute emails based on selected events and recipient groups.

Available Features

- Select predefined events
- Create custom email subjects
- Compose email messages
- Choose recipient groups
- Send bulk communications
- Centralized email management

Information Captured

Field	Description
Select Event	Choose the event associated with the email campaign
Subject	Enter the email subject line

Field	Description
Body	Compose the email content
Recipient Email	Select the recipient group or subscriber list
Send Email	Sends the email to the selected recipients

Sending an Email Campaign

Step 1

Navigate to:

Admin → Email Campaigns

Step 2

Select an event from the **Select Event** dropdown.

Step 3

Enter the **Email Subject**.

Step 4

Compose the message in the **Body** section.

Step 5

Select the recipient group from the **Recipient Email** dropdown.

Step 6

Review the email details.

Step 7

Click **SEND EMAIL** to distribute the communication.

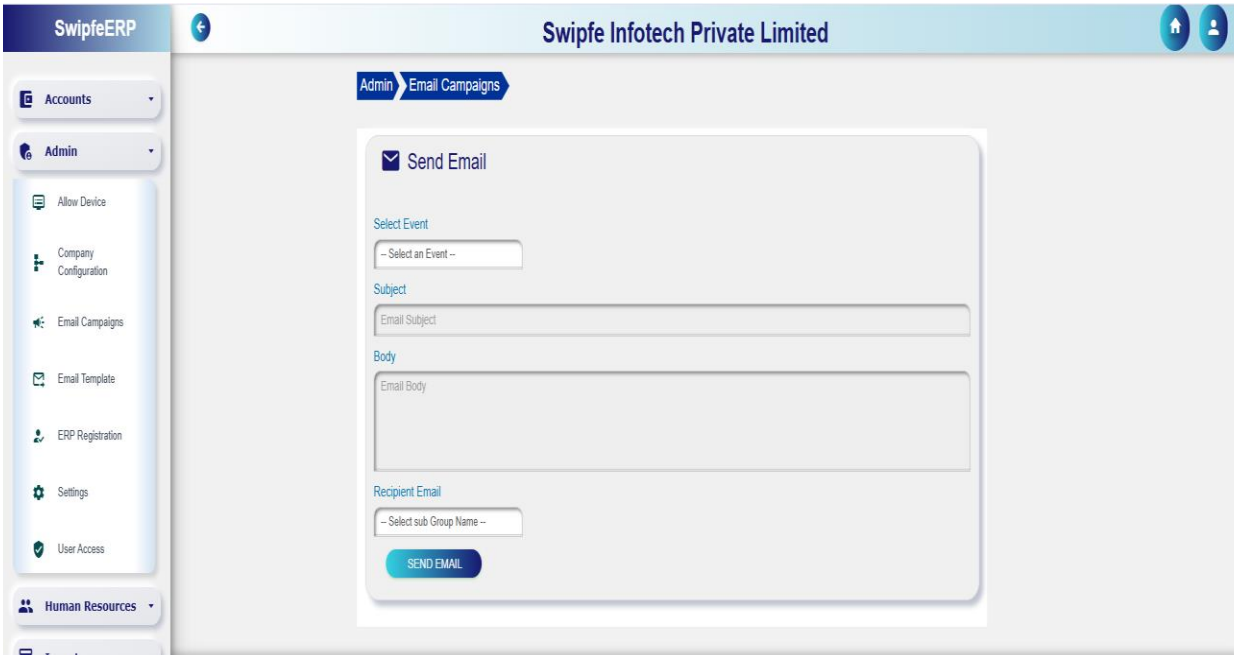
Best Practices

- Use clear and meaningful subject lines.
- Verify recipient groups before sending.
- Review the email content for accuracy.
- Send event-specific communications to relevant audiences.
- Avoid duplicate or unnecessary email campaigns.

Benefits

- Faster communication with stakeholders
- Centralized email management
- Improved engagement and information sharing
- Reduced manual effort
- Consistent business communication

- Better coordination across teams



Note

Ensure that recipient groups and email templates are configured correctly before sending campaigns. Once an email is sent, verify delivery and content accuracy to maintain professional communication standards.

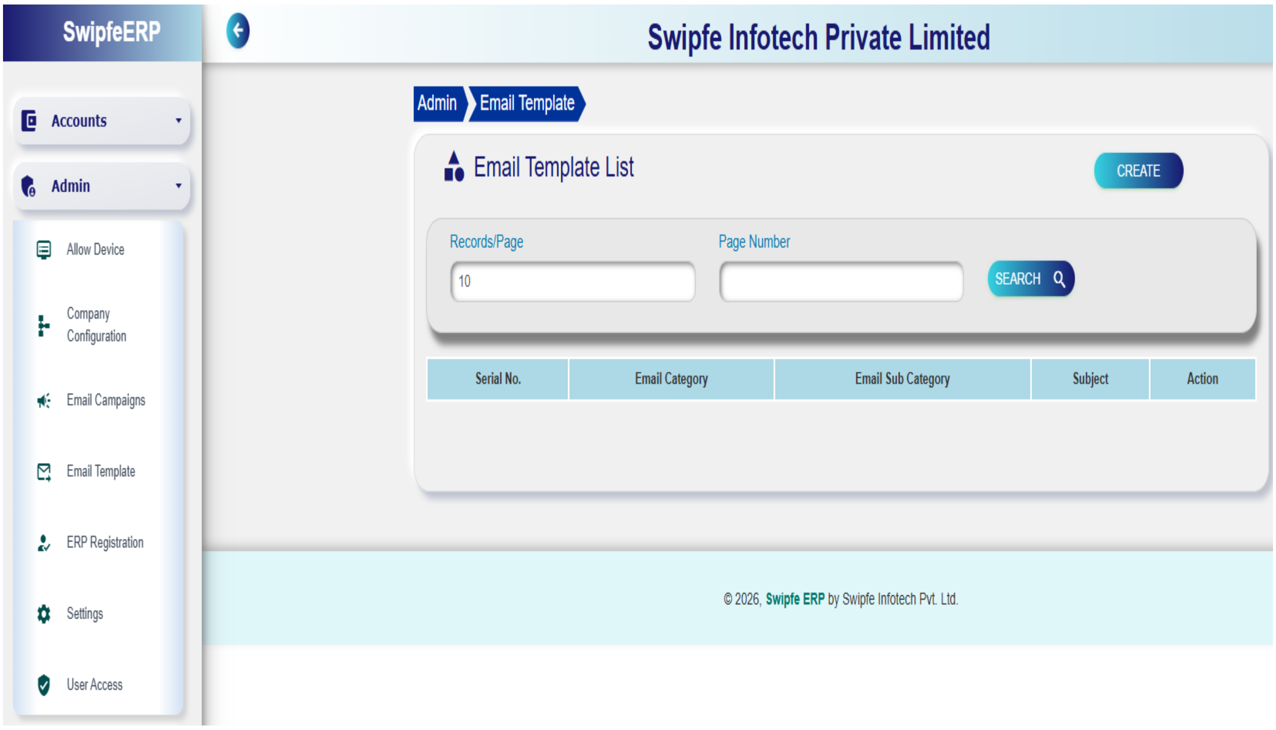
3.Email Template

Navigation Path

Admin → Email Template

Purpose

The **Email Template** module helps users create and manage consistent, professional email communications using reusable templates. It allows customization of content and layouts to match business requirements while maintaining brand identity across all communications. By supporting ready-to-use templates, personalized messaging, and integration with email campaigns and notifications, the module reduces repetitive work, improves efficiency, and enhances customer engagement through effective and visually appealing emails.



Email Template List

The Email Template List screen displays all available email templates configured in the system.

Available Features

- Create new email templates
- View existing templates
- Search template records
- Navigate through pages
- Categorize templates
- Manage email subjects and content

Search Options

Users can locate templates using the following options:

- Records/Page
- Page Number
- Search

Information Displayed

Field	Description
Serial No.	Unique identifier of the template
Email Category	Main category of the email
Email Sub Category	Subcategory of the email

Field	Description
Subject	Email subject line
Action	View or edit template details

Creating an Email Template

Step 1

Navigate to:

Admin → Email Template

Step 2

Click the **CREATE** button.

Step 3

Enter the required details:

- **Sr. No.** – Unique template number.
- **Email Category** – Specify the main email category.
- **Email Sub Category** – Specify the subcategory.
- **Subject** – Enter the email subject.
- **Body** – Type the email content.

Step 4

Review the entered information.

Step 5

Click **CREATE** to save the template.

Step 6

Click **BACK TO LIST** to return to the Email Template List.

Benefits

- Standardizes business communications
- Saves time through reusable templates
- Ensures brand consistency
- Reduces manual drafting effort
- Supports personalized messaging
- Improves communication efficiency
- Minimizes errors in recurring emails

Note

It is recommended to create and maintain approved email templates for frequently used communications. Regularly review templates to ensure that the content remains accurate, relevant, and aligned with organizational communication standards.

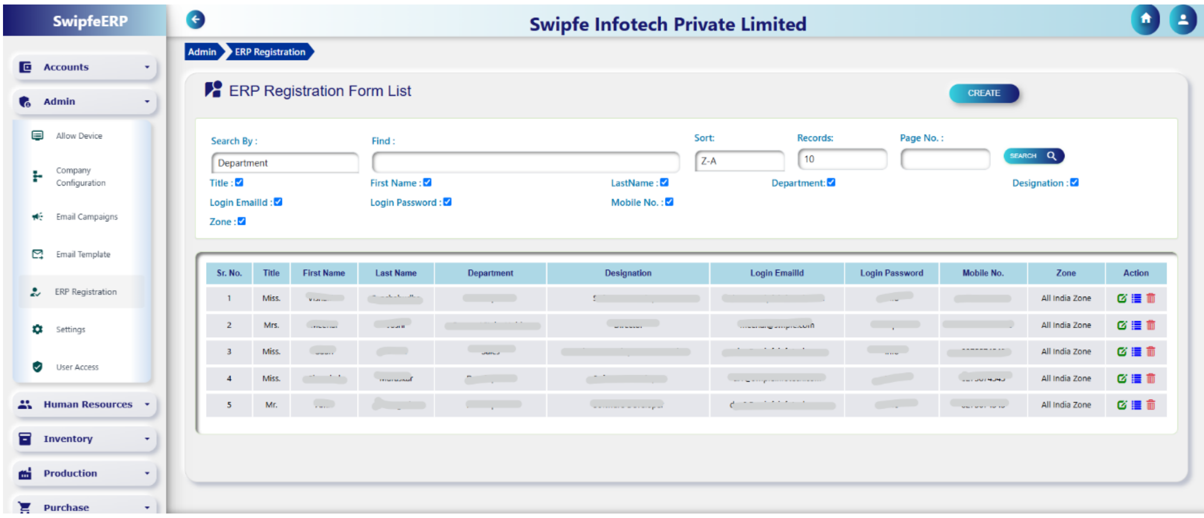
5. ERP Registration

Navigation Path

Admin → ERP Registration

Purpose

The **ERP Registration** module enables administrators to register users and provide secure access to Swipfe ERP. It links employees with their respective departments and designations while generating login credentials for system access. The module helps streamline user onboarding, maintain role-based access, and ensure that authorized users can efficiently utilize ERP functionalities within their assigned responsibilities.



ERP Registration Form List

The ERP Registration Form List displays all registered ERP users and their login information.

Available Features

- Create ERP registrations

- Search registered users
- Sort records
- View user details
- Edit registration information
- Delete registrations
- Page navigation

Search and Filter Options

Users can search registration records using:

- Title
- First Name
- Last Name
- Department
- Designation
- Login Email ID
- Login Password
- Mobile Number
- Zone

Additional Filters

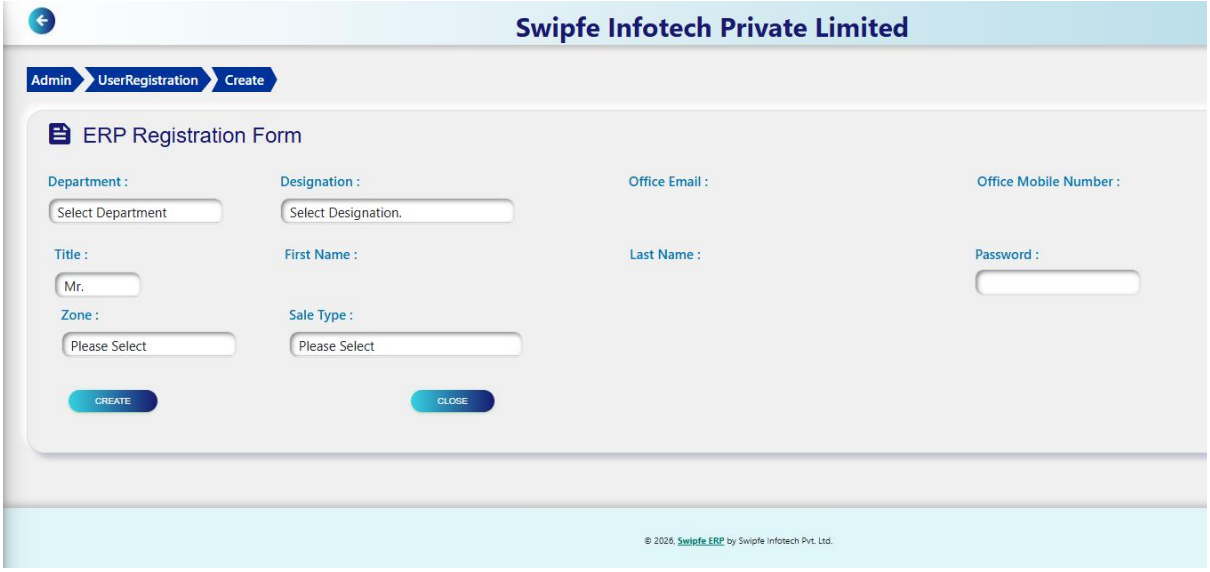
- **Find** – Search specific records
- **Sort** – Arrange records (A–Z / Z–A)
- **Records** – Number of records displayed
- **Page No.** – Navigate to a specific page

Information Displayed

Field	Description
Sr. No.	Registration sequence number
Title	Mr., Mrs., Miss, etc.
First Name	User's first name
Last Name	User's last name
Department	Assigned department
Designation	Assigned designation
Login Email ID	User login email
Login Password	User password
Mobile No.	Contact number

Field	Description
Zone	Assigned operational zone
Action	View, Edit, or Delete registration

ERP Registration – Create User



Step 1

Navigate to:

Admin → ERP Registration

Step 2

Click the **CREATE** button.

Step 3

Select the employee's **Department**.

Step 4

Select the corresponding **Designation**.

Step 5

Enter the following details:

- Office Email
- Office Mobile Number
- Title
- First Name
- Last Name
- Password
- Zone
- Sale Type

Step 6

Review the entered information carefully.

Step 7

Click **CREATE** to register the user.

Step 8

Click **CLOSE** to exit the registration form without saving.

ERP Registration Workflow

Department
↓
Designation
↓
Enter User Details
↓
Assign Zone and Sale Type
↓
Generate Login Credentials
↓
ERP Registration Completed

Benefits

- Simplifies employee onboarding
- Provides secure ERP access
- Maintains department-wise user mapping
- Supports role-based system usage
- Reduces manual registration efforts
- Ensures authorized access to ERP modules
- Improves user management and control

6. User Access

Navigation Path

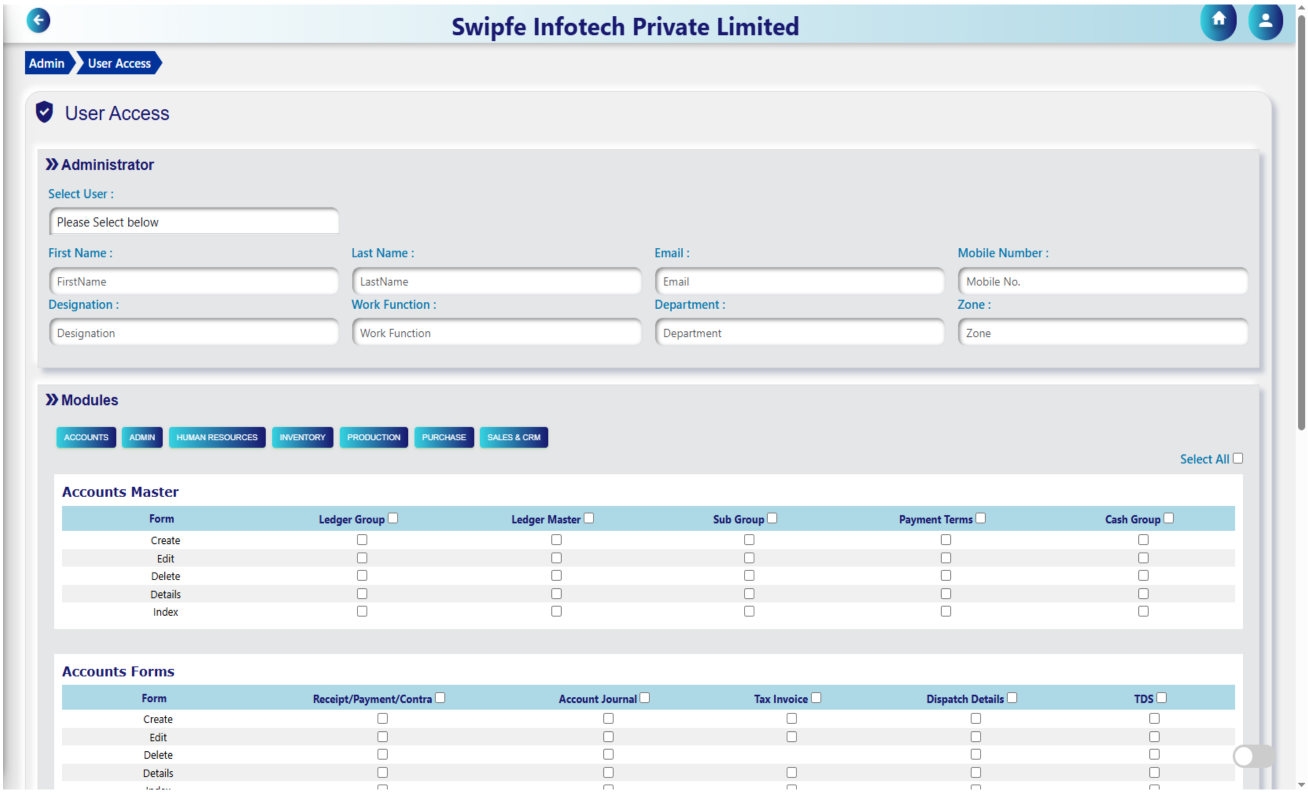
Admin → User Access

Purpose

The User Access module enables administrators to manage role-based permissions across various modules of Swipfe ERP. It allows organizations to control which users can create, edit, delete, view, or access specific records and transactions. By assigning module-wise permissions, administrators can enhance system security, maintain data integrity, and ensure users access only the information relevant to their responsibilities.

User Access Screen

The User Access screen allows administrators to select a registered user and configure access rights for different ERP modules and functions.



Available Features

• Select and manage registered users
• View employee information
• Assign module-wise permissions
• Grant Create, Edit, Delete, Details, and Index access
• Configure access for Accounts, Admin, Human Resources, Inventory, Production, Purchase, and Sales & CRM modules
• Apply permissions using Select All option
• Maintain role-based access control
• Restrict unauthorized system usage

Information Displayed

Field	Description
Select User	Select the user whose permissions are to be configured
First Name	User's first name
Last Name	User's last name
Email	Registered email address

Field	Description
Mobile Number	User's contact number
Designation	User's assigned designation
Work Function	Assigned work function
Department	Assigned department
Zone	User's operational zone
Modules	ERP modules available for access assignment
Select All	Grants or removes all permissions within the selected module

Permission Types

Permission	Description
Create	Allows creation of new records
Edit	Allows modification of existing records
Delete	Allows deletion of records
Details	Allows viewing detailed information
Index	Allows access to listing and search screens

Assigning User Access

Step 1

Navigate to:

Admin → User Access

Step 2

Select the required user from the **Select User** dropdown.

Step 3

Verify the user information displayed on the screen.

Step 4

Select the required ERP module such as:
- Accounts
- Admin
- Human Resources
- Inventory
- Production
- Purchase
- Sales & CRM

Step 5

Assign permissions by selecting the required checkboxes for:
• Create
• Edit
• Delete
• Details
• Index

Step 6

Use **Select All** if full access is required for the selected module.

Step 7

Review all assigned permissions carefully.

Step 8

Save the access configuration.

User Access Workflow

Select User
↓
Choose Module
↓
Assign Permissions
↓
Review Access Rights
↓
Save Configuration
↓
User Access Updated

Benefits

• Enhances system security
• Supports role-based access control
• Prevents unauthorized data access
• Improves accountability and compliance
• Simplifies permission management
• Reduces operational risks
• Ensures department-wise access control
• Maintains data confidentiality

Note

User access rights should be assigned according to organizational roles and responsibilities. Periodic review of permissions is recommended to ensure users retain only the access necessary for their job functions.

6. Settings

Navigation Path

Admin → Setting

Purpose

The Settings module allows administrators to configure and customize ERP behaviour across different business functions. It provides centralized control over Accounts, Sales, Inventory, Purchase, Production, Human Resources, Layout, and Customization settings, enabling organizations to align the ERP system with their operational requirements and business processes.

ERP Settings Dashboard

The ERP Settings Dashboard serves as the central configuration hub where administrators can access and manage settings for various modules within Swipe ERP.

Available Features

- Accounts Settings
- Sales Settings
- Inventory Settings
- Purchase Settings
- Production Settings
- Human Resources Settings
- Layout Settings
- Customization Panel

Available Setting Categories

Setting Category	**Description**
Accounts	Configure accounting and financial preferences
Sales	Manage sales-related settings and workflows

Setting Category	Description
Inventory	Configure inventory and stock management settings
Purchase	Manage procurement and purchasing preferences
Production	Configure production-related settings
Human Resources	Manage HR operational settings
Layout	Customize ERP interface layouts
Customization Panel	Personalize ERP appearance and user interface

Settings Workflow

Open Settings Dashboard
↓
Select Module Category
↓
Configure Parameters
↓
Review Settings
↓
Save Changes
↓
Settings Updated

Benefits

- Centralized configuration management
- Improved operational control
- Standardized business processes
- Enhanced ERP flexibility
- Better user experience customization
- Simplified system administration
- Supports business-specific requirements

Note

Changes made within the Settings module may affect system-wide operations. Only authorized administrators should modify configuration settings, and all changes should be reviewed before saving.

6.1 Accounts Settings

Navigation Path

Admin → Setting → Accounts

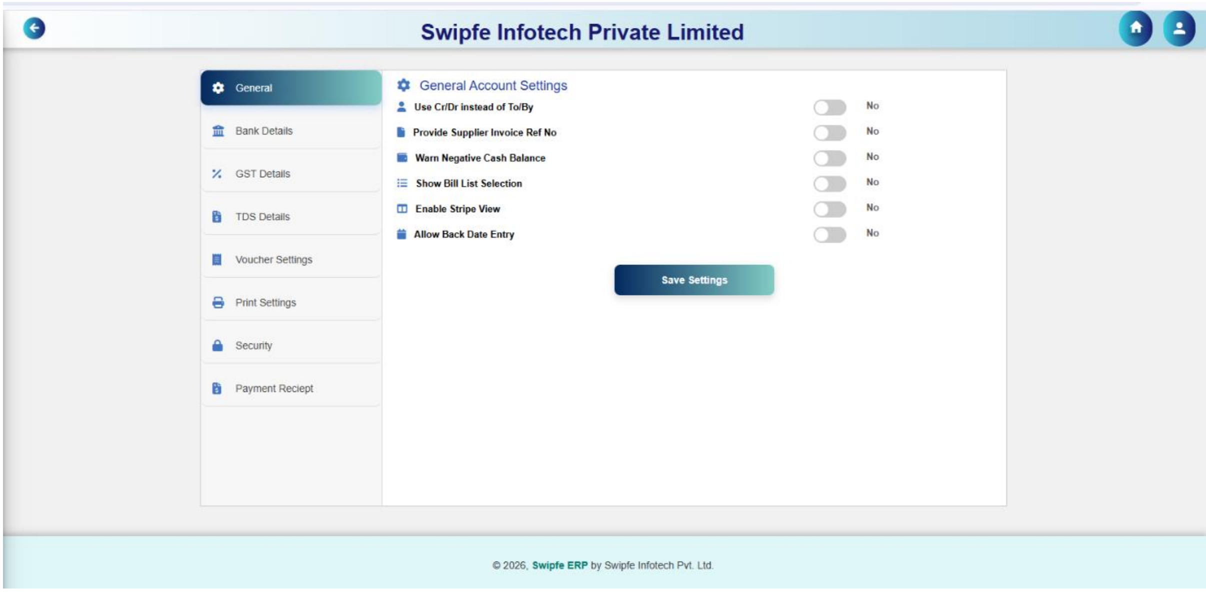
Accounts Settings Screen

The Accounts Settings screen provides various configuration options that influence accounting transactions, voucher processing, supplier invoice management, cash balance monitoring, bill selection, and transaction entry controls.

Available Features

- General Account Settings
- Bank Details Configuration

• GST Details Configuration
• TDS Details Configuration
• Voucher Settings
• Print Settings
• Security Settings
• Payment Receipt Settings
• Save Configuration Changes



General Account Settings

Setting	**Description**
Use Cr/Dr instead of To/By	Displays accounting entries using Cr/Dr terminology
Provide Supplier Invoice Ref No	Enables supplier invoice reference number entry
Warn Negative Cash Balance	Generates warning when cash balance becomes negative
Show Bill List Selection	Displays bill selection list during transactions
Enable Stripe View	Enables stripe-based transaction display view
Allow Back Date Entry	Allows users to enter back-dated transactions

Updating Account Settings

Step 1

Navigate to:

Admin → Setting → Accounts

Step 2

Select the required settings category from the left menu:
• General
• Bank Details
• GST Details
• TDS Details
• Voucher Settings
• Print Settings

• Security
• Payment Receipt

Step 3

Enable or disable the required configuration options using the toggle buttons.

Step 4

Review the selected settings.

Step 5

Click **Save Settings** to apply the changes.

Accounts Settings Workflow

Open Accounts Settings
↓
Select Settings Category
↓
Enable/Disable Required Options
↓
Review Configuration
↓
Save Settings
↓
Settings Updated

Benefits

• Improves accounting process control
• Enhances transaction accuracy
• Supports organization-specific accounting practices
• Reduces data entry errors
• Improves financial monitoring
• Provides flexible accounting configurations
• Strengthens financial governance

Note

Changes made in Accounts Settings may impact accounting transactions throughout the ERP system. It is recommended that only authorized finance administrators modify these settings after proper review and approval.

7.1.1 Customization Panel

Navigation Path

Admin → Setting → Customization Panel

Purpose

The Customization Panel allows administrators to personalize the appearance and visual theme of SwipeERP. It provides options to customize module buttons, dropdown menus, sidebar colors, header and footer styling, and action button appearances. This helps organizations align the ERP interface with their branding requirements while improving the overall user experience.

Available Features

• Module Button Customization
• Module Dropdown Customization

• Sidebar Colour Management
• Header Colour Configuration
• Footer Colour Configuration
• Action Button Customization
• Apply Individual Design Changes
• Reset to Default Settings

Customizable Components

Component	Description
Module Button	Customize module button background and font colors
Module Dropdown	Configure dropdown menu background and font colors
Sidebar Colour	Change sidebar background appearance
Header Colour	Customize header background and text colors
Footer Colour	Modify footer background and font colors
Action Buttons	Configure colors of Create, Search, Update, and other action buttons
Reset to Default	Restore the default SwipeERP theme settings

Module Button Customization

Administrators can configure:

• Button Colour
• Font Colour
• Module Display Appearance

After selecting the desired colors, click **Apply** to update the module button design.

Module Dropdown Customization

Administrators can configure:

• Dropdown Background Colour
• Dropdown Font Colour
• Sub-Module Display Appearance

Click **Apply** to save the changes.

Sidebar Colour Configuration

Administrators can:

• Select Sidebar Background Colour
• Preview Sidebar Appearance
• Apply Updated Theme Settings

Click **Apply** to update the sidebar color.

Header Colour Configuration

Administrators can configure:

• Header Background Colour
• Header Font Colour
• Company Name Display Appearance

Click **Apply** to save the configuration.

Footer Colour Configuration

Administrators can configure:

- Footer Background Colour
- Footer Font Colour
- Footer Display Appearance

Click **Apply** to update the footer design.

Action Button Customization

Administrators can customize the appearance of:

- Create Button
- Search Button
- Update Button
- Other System Action Buttons

Options available:

- Button Colour
- Font Colour

Click **Apply** to save the changes.

Resetting Default Theme

Step 1

Navigate to:

Admin → Setting → Customization Panel

Step 2

Click **Reset to Default**.

Step 3

Confirm the action.

Step 4

The system restores the original SwipeERP theme settings.

Customization Workflow

Open Customization Panel
↓
Select Interface Component
↓
Choose Colours and Appearance Settings
↓
Preview Changes
↓
Click Apply
↓
Customization Updated

Benefits

• Supports company branding requirements
• Enhances user experience
• Provides a personalized ERP interface
• Improves visual consistency across modules
• Simplifies theme management
• Enables quick UI modifications
• Allows restoration of default settings when required