SWIPFE ERP USER MANUAL

Complete Business Management Solution

Table of Contents

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.

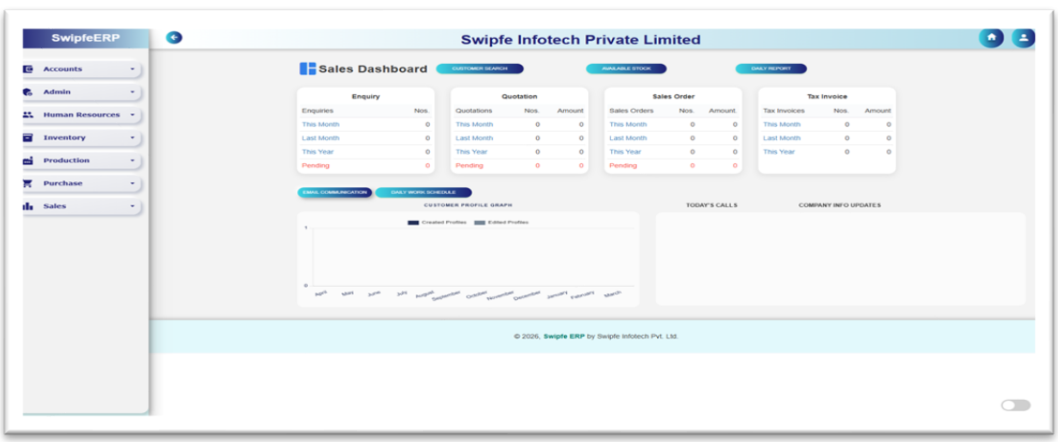
Swipfe ERP is an all-in-one solution for managing core business operations efficiently.

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.Human Resource Module

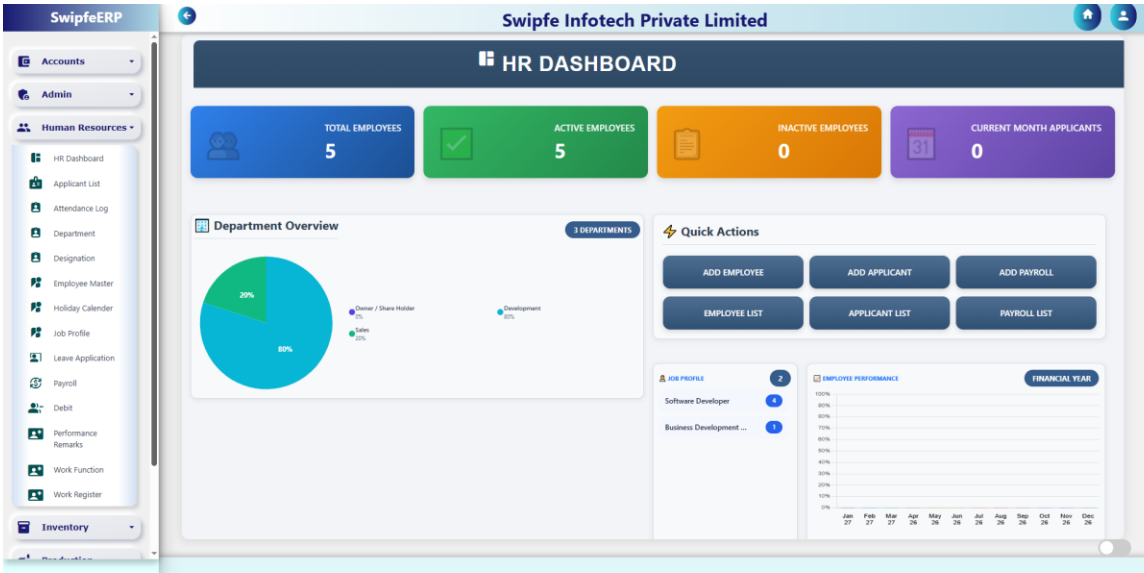
The Human Resource module helps organizations manage employees, departments, designations, payroll, attendance, and performance tracking.

Department Management

Navigate to Human Resources → Department to create, search, edit, and manage departments.

1.HR Dashboard

The HR Dashboard provides an overview of Total Employees, Active Employees, Inactive Employees, Applicants, Department Statistics, Quick Actions, and Performance Analytics.



HR Setup Workflow

Before creating employees, follow the sequence below:

2.HR-Department Creation:

Step 1

Create Department

If the department already exists, skip this step.

3.HR-Designation Creation:

Step 2

Create Designation

Create designations under the department.

If the designation already exists, skip this step.

Step 3

Configure Work Function

Assign work functions to the designation.

Step 4

4.Create Job Profile

Define responsibilities and job requirements.

5.HR-Employee Creation:

Step 5

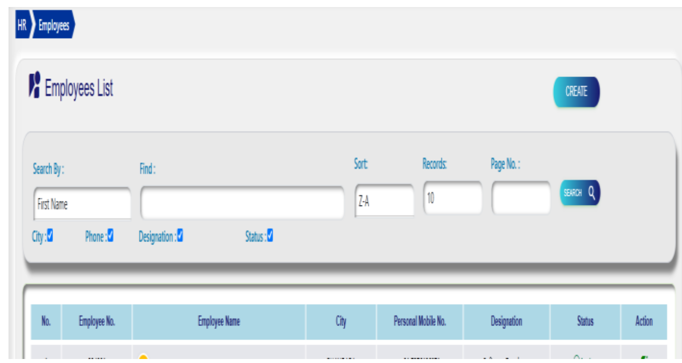
6.Create Employee Master

Create employee records.

Step 6

ERP Registration

Register the employee in the ERP system.



Workflow Diagram

Department
↓
Designation
↓
Work Function
↓
Job Profile
↓
Employee Master
↓
ERP Registration

Search Department

Users can search departments using:

- Department Name
- Sorting Options
- Page Navigation

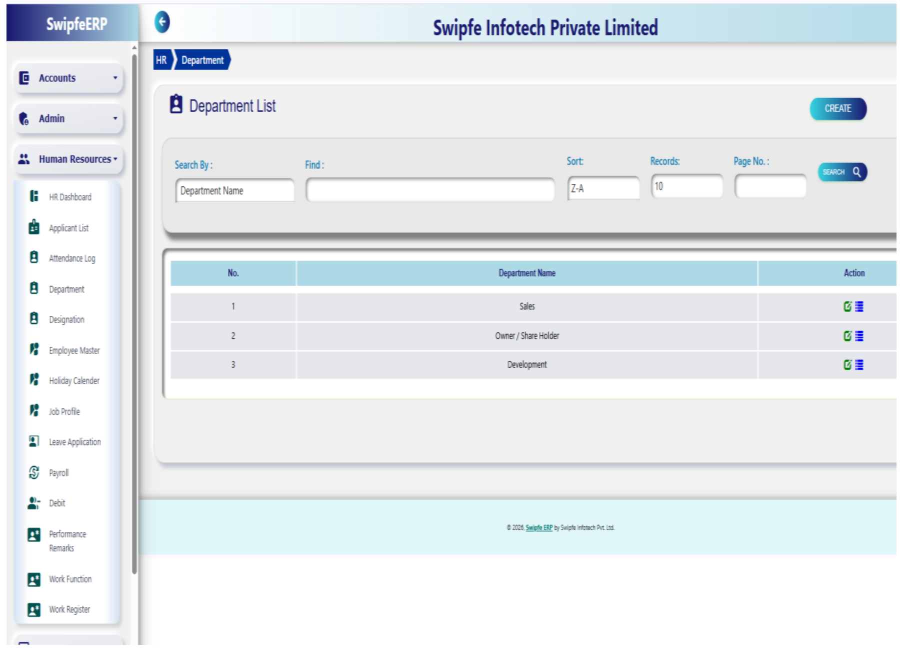
Edit Department

1. Locate the department from the list.

2. Click the Edit icon.
3. Update information.
4. Save changes.

Department List Features

- Department Listing
- Search Facility
- Sorting
- Record Filtering
- Edit Functionality



7.Applicants List

Navigation Path

Human Resources → Applicants → Applicants List

Purpose

The Applicants module helps HR teams manage job applicants and maintain records of candidates applying for various positions within the organization.

Applicants List

The Applicants List screen displays all candidate applications received by the organization.

Available Search Options

Users can search applicant records using:

- First Name
- Applied Position
- Email Address
- Mobile Number

Information Displayed

Field	Description
Application Date	Date on which the application was submitted.
Applied Position	Position for which the candidate applied.

First Name	Applicant's first name.
Last Name	Applicant's last name.
Email	Applicant's email address.
Mobile Number	Contact number.
Date of Birth	Applicant's date of birth.
Gender	Applicant's gender.
Actions	View, Edit, or Manage applicant details.

Managing Applicants

View Applicant Details

1. Navigate to Applicants List.
2. Locate the required applicant.
3. Click the appropriate action button.
4. Review applicant information.

Update Applicant Information

1. Select the applicant record.
2. Click Edit.
3. Modify the required details.
4. Save the changes.

Benefits

- Centralized applicant tracking
- Quick candidate search
- Easy applicant management
- Improved recruitment process
- Organized hiring records

8.Payroll

Human Resources → Payroll

Purpose

The Payroll module is used to calculate, manage, and process employee salaries. It ensures accurate salary computation by considering basic salary, allowances, incentives, and other payroll components.

Creating Payroll

Step 1

Navigate to:

Human Resources → Payroll

Step 2

Click Create Payroll.

Step 3

Select the employee.

Step 4

Enter payroll details:

- **Payroll Date**
- **Basic Salary**
- **HRA**
- **Productivity Incentive**
- **Punctuality Incentive**
- **Other Salary Components (if applicable)**

Step 5

Verify the calculated Net Salary.

Step 6

Click Save.

9.Attendance Log

Navigation Path

Human Resources → Attendance Log

Purpose

The Attendance Log module is used to record, monitor, and manage employee attendance. It helps HR teams track employee working hours, attendance patterns, and daily time records.

Upload Attendance

HR administrators can upload attendance data directly into the system using the **Upload Attendance** option.

Viewing Attendance Records

Step 1

Navigate to:

Human Resources → Attendance Log

Step 2

Use the search filters to locate the required employee.

Step 3

Select the desired attendance record.

Step 4

Review attendance details including:

- Date
- In Time
- Out Time
- Employee Information

Upload Attendance Data

Step 1

Navigate to: Human Resources → Attendance Log

Step 2

Click Upload Attendance**.**

Step 3

Select the attendance file.

Step 4

Verify the uploaded information.
Step 5
Submit the attendance data.

10.Holiday Calendar

Human Resources → Holiday Calendar

Purpose

The Holiday Calendar module is used to define and manage organizational holidays. It helps employees and management stay informed about mandatory, optional, and company-specific holidays throughout the year.

Creating a Holiday

Step 1

Navigate to:

Human Resources → Holiday Calendar

Step 2

Click **Create**.

Step 3

Enter the following details:

- Holiday Date
- Holiday Occasion
- Holiday Type

Step 4

Click **Save**.

11.Leave Management

Human Resources → Leave Applications

Purpose

The Leave Management module enables employees to submit leave requests and allows HR personnel to review, approve, reject, and track leave applications efficiently.

Leave Application Process

Step 1

Navigate to:

Human Resources → Leave Applications

Step 2

Create a new leave application.

Step 3

Enter leave details:

- Leave Type
- From Date
- To Date
- Reason for Leave (if applicable)

Step 4

Submit the application.

Step 5

The application is forwarded for review and approval.

Leave Status

Leave requests may have the following statuses:

- Pending
- Approved
- Rejected
- Cancelled

Managing Leave Applications

View Application

1. Open the Leave Applications list.
2. Select the required application.
3. Review employee and leave details.

Approve or Reject Leave

1. Open the leave application.
2. Review the leave request.
3. Select **Approve** or **Reject**.
4. Save the decision.

12.Debit Management

Human Resources → Debit

Purpose

The Debit module is used to record and manage deductions or recoveries from employees. These deductions may arise due to item damage, material loss, company asset recovery, or other chargeable expenses.

Creating a Debit Entry

Step 1

Navigate to:

Human Resources → Debit

Step 2

Click **Create**.

Step 3

Enter the required information:

- Employee Name
- Month
- Year
- Godown

- Item Damage Details
- Rate
- Quantity
- Other Amount (if applicable)

Step 4

Verify the calculated amount.

Step 5

Click **Save**.

13.Performance Remark Management

Human Resources → Performance Remark

Purpose

The Performance Remark module is used to monitor and evaluate employee performance by recording work achievements, productivity, and areas requiring improvement. It helps management assess employee efficiency and maintain performance records.

Creating a Performance Remark

Step 1

Navigate to:

Human Resources → Performance Remark

Step 2

Click **Create**.

Step 3

Enter the required details:

- Employee Name
- Work Date
- Work Function Name
- Quantity
- Good Works
- Mistakes

Step 4

Review the information.

Step 5

Click **Save**.

14. Work Function Management

Human Resources → Work Function

Purpose

The Work Function module is used to define and manage specific tasks, responsibilities, and operational activities performed within various departments. It helps standardize work processes and measure employee productivity.

Information Displayed

Field	Description
Work Function Name	Name of the task or activity
Approved Time Per No.	Standard time allocated for completing one unit
Unit	Time measurement unit (Hours, Minutes, etc.)
Set Up Time Per No.	Preparation or setup time required
Unit	Setup time measurement unit
Department	Department responsible for the work function
Work Instructions	Instructions or guidelines for performing the task
Actions	View, Edit, or Manage work functions

Example

Work Function Name	Approved Time	Setup Time	Department
Sales and Business Growth	1 Hour	15 Minutes	Sales