

## Complete Business Management Solution

### Table of Contents

1. Introduction
2. Dashboard Overview
3. Modules Overview
4. Sales
  1. Sales Dashboard
  2. Customer Follow Up
  3. Customer Follow Up
  4. Enquiry
  5. Pincode List
  6. Quotation
  7. Quotation Follow Up
  8. Sales Order
  9. Sales Order Status
  10. Terms Of Delivery

## 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.**

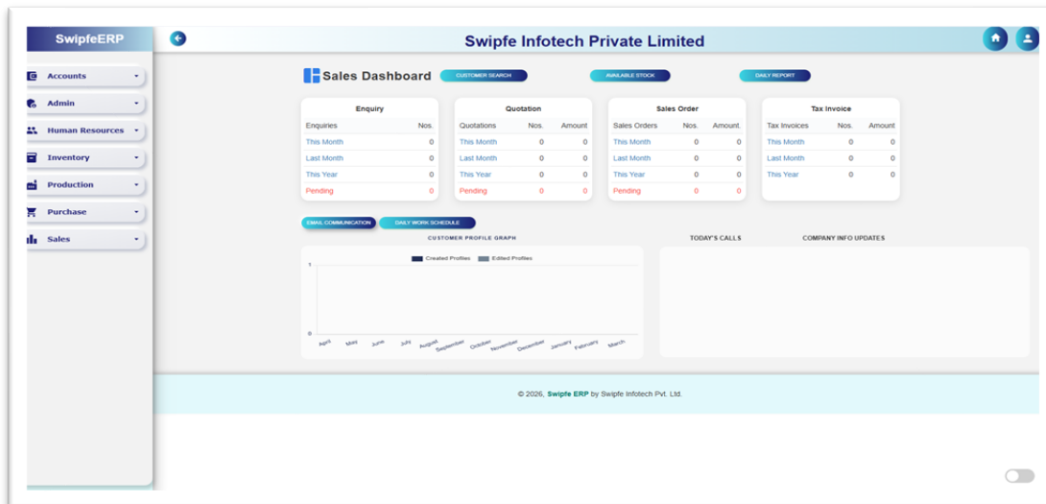
**Swipfe ERP is an all-in-one solution for managing core business operations efficiently.**

**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.



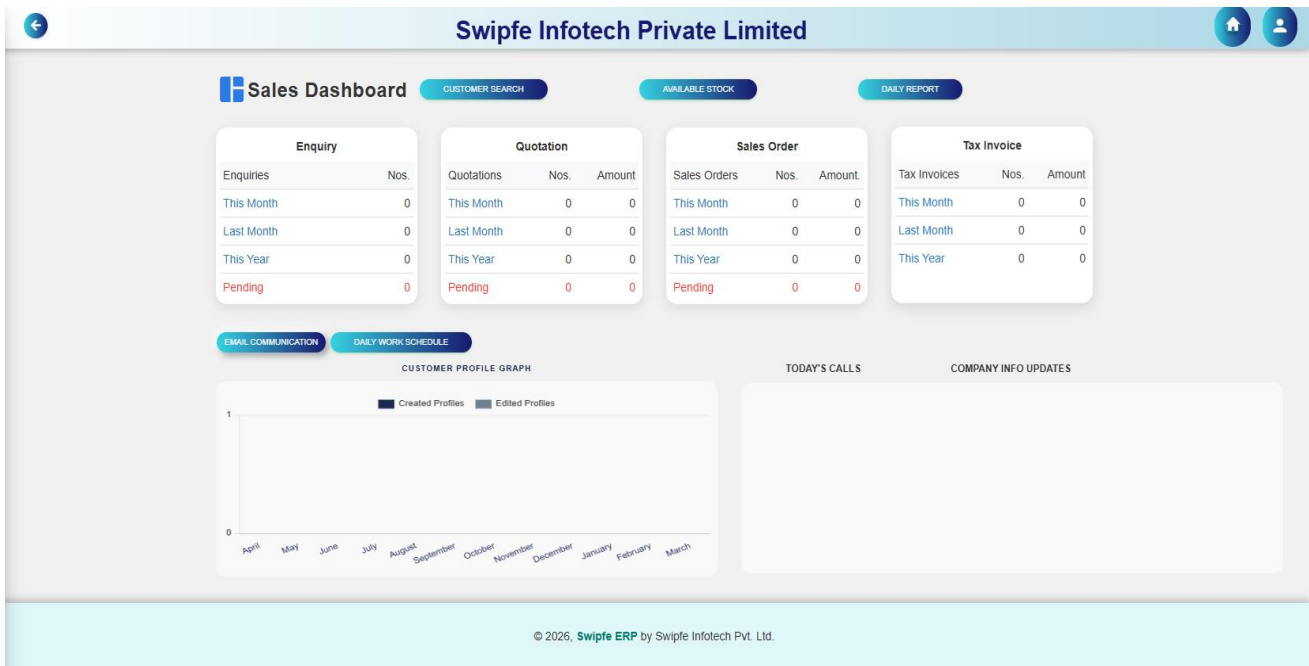
## Key Features

- 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



## 1.Sales Dashboard

The Sales Dashboard provides a centralized overview of sales activities and performance indicators. It enables users to monitor enquiries, quotations, sales orders, tax invoices, customer activities, and daily operations from a single screen. The dashboard helps management and sales teams make informed decisions using real-time business insights.

### Quick Action Buttons

The following shortcuts are available:

- Customer Search
- Available Stock
- Daily Report
- Email Communication
- Daily Work Schedule

## 2.Customer Follow Up:

### Purpose

Customer Follow Up helps the sales team maintain regular communication with prospects and existing customers. It enables users to record customer interactions, track responses, monitor sales opportunities, and ensure timely follow-up activities. This feature improves customer engagement, increases conversion rates, and supports better relationship management.

### Search Section

Users can search follow-up records using:

- **Search By:** Customer Follow Up Number
- **Find:** Enter search keyword.
- **Sort:** Ascending (A–Z) or Descending (Z–A).

- **Records:** Number of records displayed per page.
- **Page No.:** Navigate directly to a specific page.
- **Search:** Retrieves matching records.

Field	Description
Customer Follow Up No.	Unique follow-up reference number
Customer Follow Up Date	Date of follow-up activity
Company Name	Customer company name
Mode of Communication	Method used for communication
Feedback Type	Customer response category
User Zone	Sales zone assigned to the user
Action	View/Edit options

### Steps to View Customer Follow Up Records

#### Step 1:

Navigate to:

**Sales → Customer Follow Up**

#### Step 2:

Use the Search By option to select the desired search parameter.

#### Step 3:

Enter the search keyword in the Find field.

#### Step 4:

Select sorting preference.

#### Step 5:

Click **Search**.

#### Step 6:

Review the displayed records.


#### Step 7:

Use the Action button to view or modify the follow-up record.

**Swipfe Infotech Private Limited**

**Sales** > **Customer Follow Up**

**Customer Follow Up** CREATE

Search By: Find: Sort: Records: Page No. : SEARCH 

Customer FollowUp No.   Z-A  10

FollowUp Number:  FollowUp Date:  Communication Type:  Company Name:

No.	Customer FollowUp No.	Customer FollowUp Date	Company Name	Mode Of Communication	FeedBack Type	User Zone	Action

© 2026, [Swipfe ERP](#) by Swipfe Infotech Pvt. Ltd.

**#Steps to Create Customer Follow Up**

**Navigate to:**

**Sales → Customer Follow Up → Create**

**Customer Search Section**

**Customer Follow Up Creation**

Company Name: [ ] +91: [ ] Email Id: [ ] Contact Person: [ ]

**Enquiry Details**

Customer FollowUp No.: [FC260600001] Customer FollowUp Date: [12/06/2026]

**Customer Details**

Company Name: [Please Select] Add.Title: [Please Select] Address: [ ]

Locality / Village: [ ] Taluka/ Town/ City: [ ] Pincode: [ ] District: [ ] State: [ ]

Contact Person Name: [Please Select] Code: [ ] Office Contact: [Please Select] Office Email: [Please Select]

**Mode Of Communication**

By Phone Call  By Email  By Sales Visit  By Customer Walk In

**Customer Response**

Received PO  Sending PO  Require Time To Decide  Require Negotiation

SendingPO: [ ] Require Time To Decide: [ ]

Enter customer details to retrieve existing customer information.

Field	Description
Company Name	Name of the customer company
Mobile Number	Customer contact number
Email ID	Customer email address
Contact Person	Name of contact person
Search	Retrieves customer details

### Enquiry Details

This section captures the basic follow-up information.

#### Fields

Field	Description
Customer Follow Up No.	System-generated follow-up number
Customer Follow Up Date	Date of follow-up

### Customer Details

This section displays or captures customer information.

#### Fields

<b>Field</b>	<b>Description</b>
Company Name	Name of the company
Address Title	Address category
Address	Company address
Locality/Village	Locality details
Taluka/Town/City	City information
Pin code	Postal code
District	District name
State	State name
Contact Person Name	Customer representative
Code	Customer code
Office Contact	Office contact number
Office Email	Official email address

### **Mode of Communication**

Select the method used to communicate with the customer.

Available options include:

- By Phone Call
- By Email
- By Sales Visit
- By Customer Walk In

Only one communication mode can be selected for a follow-up entry.

### **Customer Response**

Record the customer's response during the interaction.

Available response types include:

#### **Received PO**

Indicates that the customer has issued a Purchase Order.

#### **Sending PO**

Indicates that the customer has agreed to send the Purchase Order later.

Additional Field:

- Sending PO Remarks

### **Require Time To Decide**

Indicates that the customer needs additional time before making a decision.

Additional Field:

- Require Time To Decide Remarks
- 

### **Require Negotiation**

Indicates that the customer wishes to negotiate pricing or terms.

Additional Field:

- Negotiation Remarks
- 

### **Not Interested**

Indicates that the customer is currently not interested.

Additional Field:

- Reason for Not Interested
- 

### **Follow Up Required**

Indicates that further communication is necessary.

Additional Fields:

- Next Follow Up Date
  - Follow Up Remarks
- 

### **Final Actions**

After entering all required information:

#### **Create**

Saves the Customer Follow Up record.

#### **Close**

Closes the screen without saving changes.

## **3. Customer Profiles**

### **Purpose**

Customer Profiles help maintain a centralized database of customer information within the ERP system. This feature enables sales teams to create, organize, and manage customer records efficiently. It provides quick access to customer details, supports targeted sales activities, and improves relationship management throughout the customer lifecycle.

### **Search Section**

Users can filter customer records using the following options:

<b>Field</b>	<b>Description</b>
Search By	Select the search parameter
Find	Enter the keyword to search
Sort	Sort records in ascending (A–Z) or descending (Z–A) order
Records	Number of records displayed per page
Page No.	Navigate directly to a specific page
Search	Displays matching records

### **Display Fields**

The list contains the following information:

<b>Field</b>	<b>Description</b>
No.	Serial number
Created Date	Date the profile was created
Last Edited	Date of last modification
Zone	Customer zone
Category	Customer category
Frequency of Purchase	Customer buying frequency
Company Name	Name of the customer company
Yearly Business	Estimated yearly business value
Address Title	Address classification
Pincode	Postal code
GSTIN	GST registration number
Action	View/Edit options

---

### **Steps to View Customer Profiles**

#### **Step 1:**

Navigate to:

**Sales → Customer Profiles**

#### **Step 2:**

Select the required search criteria.

#### **Step 3:**

Enter the keyword in the Find field.

#### **Step 4:**

Choose the sorting preference.

**Step 5:**

Specify the number of records per page if required.

**Step 6:**

Click **Search**.

**Step 7:**

Review the displayed customer records.

**Step 8:**

Use the **Action** button to view or edit customer information.



**Steps to Create a Customer Profile**

**Step 1:**

Navigate to:

**Sales → Customer Profiles → Create**

The Create Company Data window will appear.

**Step 2:**

Enter the required customer information.

**Step 3:**

Verify all details before saving.

**Step 4:**

Click **Create** to save the profile.

**Step 5:**

Click **Close** to exit without saving.

**Company Information Fields**

**Company Name**

Enter the legal name of the customer organization.

**Example:** Swipe Limited

---

### Company Website

Enter the official website address of the customer.

**Example:** www.company.com

---

### PAN Number

Enter the Permanent Account Number of the customer organization.

**Example:** ABCDE1234F

---



The screenshot shows a web application interface for 'Swipfe Engineering Private Limited'. A modal window titled 'Create Company Data' is open, containing three input fields: 'Company Name' with the example 'e.g. Swipfe Limited', 'Company Website' with the example 'e.g. www.company.com', and 'PAN Number' with the example 'e.g. ABCDE1234F'. Each field has an information icon (i) to its right. At the bottom right of the modal, there are two buttons: 'CREATE' and 'CLOSE'.

### Action Buttons

#### Create

- Saves the customer profile in the ERP system.
- Makes the profile available for future sales activities.
- Allows the customer record to be used in follow-ups, quotations, and other sales transactions.

## 5. Enquiry

### Navigation Path

#### Sales → Enquiry

Users can search enquiry records using: The Enquiry module serves as the starting point of the sales cycle in SwipeERP. It enables organizations to record customer requirements, track sales opportunities, manage product inquiries, and initiate the quotation and sales order process. The module helps maintain organized customer communication while ensuring that all enquiries are tracked efficiently from initial contact to order conversion.

### Search and Filter Options

- Enquiry Number
- Enquiry Date
- Company Name
- Enquiry Mode
- Status

The screenshot displays the 'Enquiry List' interface for Swipfe Infotech Private Limited. At the top, there is a navigation bar with a home icon and a user profile icon. Below this, the page title 'Swipfe Infotech Private Limited' is centered. The main content area is titled 'Enquiry List' and includes a 'CREATE' button. A search and filter section contains the following elements:

- Search By:** A dropdown menu set to 'Enquiry No'.
- Find:** A text input field.
- Sort:** A dropdown menu set to 'Z-A'.
- Records:** A text input field set to '10'.
- Page No.:** A text input field.
- SEARCH:** A button with a magnifying glass icon.
- Filters:** Checkboxes for 'Enquiry Date', 'Company Name', 'Enquiry Mode', and 'Status', all of which are currently checked.

Below the search section is a table with the following columns: No., Enquiry No., Qtn No., PO No., SO No., Enquiry Date, Company Name, Enquiry Mode, Status, and Action. The table body is currently empty, displaying the message 'No records found.'

At the bottom of the page, there is a copyright notice: © 2026 Swipfe ERP by Swipfe Infotech Pvt. Ltd.

### 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
Enquiry No.	Unique enquiry reference number
Qtn No.	Related quotation number
PO No.	Related purchase order number
SO No.	Related sales order number
Enquiry Date	Date of enquiry creation
Company Name	Customer company name
Enquiry Mode	Mode through which enquiry was received
Status	Current enquiry status
Action	View, Edit, or manage enquiry

### Creating an Enquiry

#### Step 1

Navigate to:

**Sales → Enquiry → Create**

### Step 2

Use the Search section to locate an existing customer, if applicable.

### Step 3

Verify or enter the enquiry details:

- Enquiry Date
- Material Requirement Period

### Step 4

Enter company information:

- Company Name
- Address Details
- Contact Person
- Office Contact
- Office Email

### Step 5

Select:

- Payment Terms
- Enquiry Mode
- Preferred Slot

### Step 6

Add required products:

- Item Name
- Item Code
- Quantity

### Step 7

Click **Add** to include the item in the enquiry.

### Step 8

Review all information.

### Step 9

Click **Create** to save the enquiry.

The screenshot shows a web application interface for creating an enquiry. The header includes a navigation breadcrumb 'Sales > Enquiry > Create' and the company name 'Swipfe Infotech Private Limited'. The main form is titled 'Enquiry Creation' and is divided into several sections:

- Search:** Fields for Company Name, +91 (Country Code), Email Id, and Contact Person, with a 'SEARCH' button.
- Enquiry Form:** Fields for Enquiry No. (EN26060001), Enquiry Date (12/06/2026), and Material Req. Period (1 Week).
- Company Details:** Fields for Company Name, Add. Title, Address, Contact Person Name, Code (+91), Office Contact, Office Email, Payment Term, Enquiry Mode, and Preferred Slot.
- Items Details:** Fields for Item Name, Item Code (Enter Code), and Quantity (1), with an 'ADD' button.

## Note

All customer requirements should be verified before creating the enquiry. Accurate enquiry information ensures smooth quotation generation and order processing.

## 5.Pincodes

### Navigation Path

Sales → Pincodes

### Purpose

The Pincodes module is used to maintain and manage geographical location information based on postal codes. It helps users accurately identify customer locations, determine delivery areas, maintain address consistency, and streamline sales, dispatch, and logistics operations. The module serves as a centralized repository of pincode-related information used throughout the ERP system.

### Pincode List

The Pincode List screen displays all available pincode records configured in the system. Users can search, filter, view, and update location information as required.

#### Available Features

- Create New Pincode Records
- Search Pincode Information
- View Location Details
- Edit Existing Records
- Sort Records
- Page Navigation
- Date-Based Record Filtering
- Monthly, Quarterly, and Financial Year Analysis

### Search and Filter Options

- Pincode
- Locality
- Taluka
- District

#### Date Filters

### The following filtering options are available:

- By Date
- By Month
- By Quarter
- Last 6 Months
- Financial Year

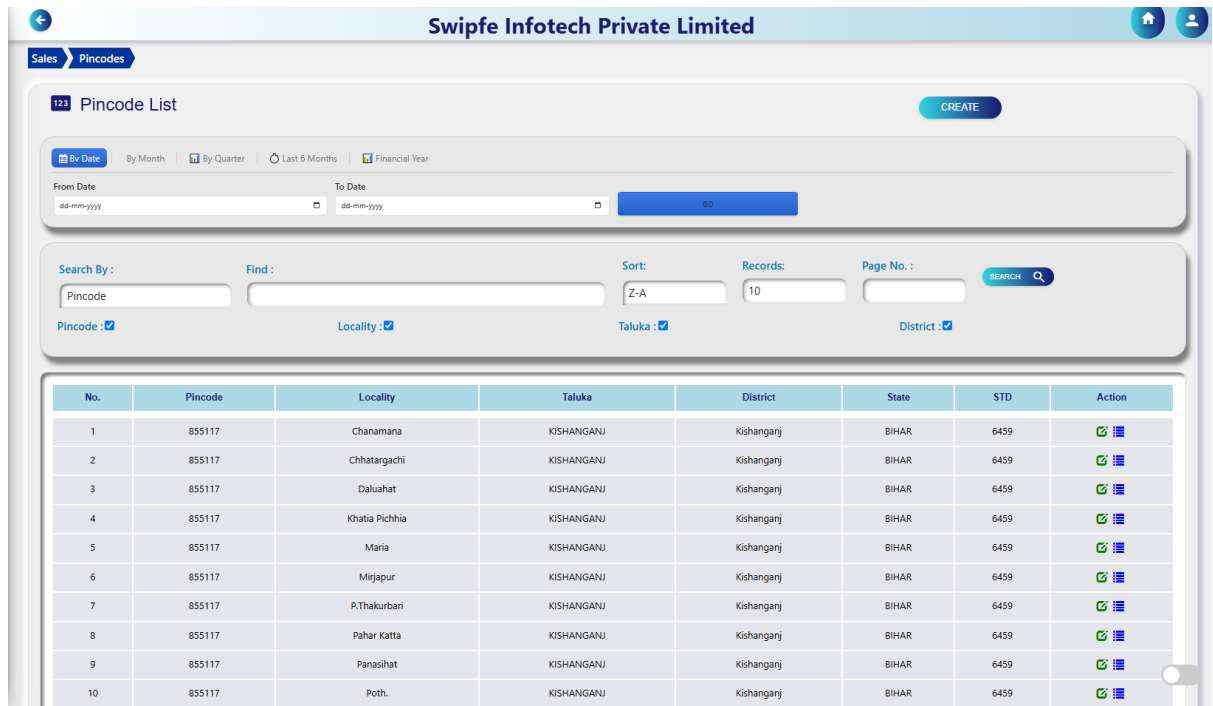
### Additional Filters

- 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
No.	Record sequence number

Pincode Postal code  
 Locality Area or locality name  
 Taluka Taluka/Tehsil name  
 District District name  
 State State name  
 STD STD telephone code  
 Action View or Edit record



### Creating a Pincode Record

#### Step 1

Navigate to:

**Sales → Pincodes → Create**

#### Step 2

Enter the locality name.

#### Step 3

Enter the taluka information.

#### Step 4

Enter the pincode number.

#### Step 5

Specify the district name.

#### Step 6

Enter the STD code.

#### Step 7

Select or enter the state name.

#### Step 8

Review all entered information.

#### Step 9

Click **Create** to save the record.

## Step 10

Click **Back** to return to the Pincode List screen.

The screenshot displays the 'Pincodes Create' interface within the Swipfe Infotech Private Limited system. The header includes a back arrow, the company name, and home/user icons. The breadcrumb trail shows 'Sales > Pincodes > Create'. The main form, titled 'Pincodes Creation', contains an 'Address Form' with the following fields: 'Locality:' (Enter Locality), 'Taluka:' (Enter Taluka), 'Pincode:' (Enter Pincode), 'District:' (Enter District), 'STD code:' (Enter STD), and 'State:' (Enter State). Below the form are 'CREATE' and 'BACK' buttons. A footer note reads '© 2026, Swipfe ERP by Swipfe Infotech Pvt. Ltd.'

## 6.Quotation

Navigation Path

**Sales → Quotation**

### Purpose

The Quotation module is used to create, manage, track, and monitor quotations generated for customer enquiries. It enables sales teams to prepare professional quotations, calculate product and freight costs, apply taxes, manage courier charges, and track quotation follow-ups. This module serves as a critical step between customer enquiry and sales order generation.

### Available Features

- Create New Quotations
- Search Existing Quotations
- Track Quotation Status
- Manage Follow-Ups
- Convert Quotations into Sales Orders
- View Quotation Details
- Edit Existing Quotations
- Monitor Quotation Amounts and Taxes

### Search and Filter Options

Users can search quotations using:

- Quotation Number
- Enquiry Number
- Courier Name
- Company Name
- Total Amount
- Product Sub Total

- Freight Charges
- GST Total

### Additional Actions

#### Create Follow Up

Allows sales executives to schedule and manage customer follow-up activities related to quotations.

#### Create Sales Order

Converts an approved quotation into a sales order for further processing.

### Quotation Creation

#### Navigation Path

Sales → Quotation → Create

#### Purpose

The Quotation Creation screen allows users to quickly generate quotations from existing enquiries. Swipe ERP automatically fetches customer, product, and enquiry information, minimizing manual data entry and reducing processing time.

#### Step 1

Navigate to:

**Sales → Quotation → Create**

#### Step 2

Select the **Enquiry Number** from the dropdown list.

#### Step 3

Click **Search**.

#### Step 4

Swipe ERP automatically retrieves and populates:

- Quotation Details
- Customer Information
- Contact Details
- Address Information
- Product Details
- Payment Terms
- Delivery Terms
- Material Requirement Information

### Step 5

Review the automatically populated information.

### Step 6

Add or modify item quantities if required.

### Step 7

Select courier and dispatch preferences.

### Step 8

Verify freight charges, taxes, and total quotation value.

### Step 9

Add any specific customer instructions, if applicable.

### Step 10

Click **Create** to generate and save the quotation.

**Swipfe Infotech Private Limited**

Sales > Quotation > Create  New

#### Quotation Creation

Enquiry Number :

#### Quotation Details

Quotation Number :  Quotation Date :  Enquiry Date :  Material Req. Period :

#### Company Details

Entity Name :  Add. Title :  Address :

Locality/ Village :  Taluka/ City :  Pincode :  District :  State :

Contact Person Name :  Code :  Office Contact :  Office Email :

Discount :  Terms Of Delivery :  Payment Term :

#### Item Details

Item Name :  ItemCode :  Quantity :

#### Courier Services

Courier Name :  Dispatch Mode :  By Hand  By Courier Transport Mode :  By Air  By Surface

Total Weight In Kg :  Docket Charges :  Fuel Charges :  Other Charges :  COD Charges :  FOV Charges :

Product Sub Total :  Freight Charges :  IGST :  CGST :  SGST :  Total Amount :

Specific Instructions by Customer

## 7.Quotation Follow Up:

### Navigation Path

Sales → Quotation Follow Up

### Purpose

The Quotation Follow Up module helps sales teams track customer responses to quotations and manage sales conversion activities. It provides a centralized view of all quotation follow-up records, communication history, and customer feedback.

### Quotation Follow Up List

The Quotation Follow Up screen displays all quotation follow-up records created within the system.

### Available Features

- Search quotation follow-up records
- View follow-up history
- Track customer responses
- Monitor communication activities
- Review feedback received from customers
- Access quotation details for further action



The screenshot displays the 'Quotation List' interface for Swipfe Infotech Private Limited. At the top, there is a navigation bar with the company name and user profile icons. Below this, the breadcrumb 'Sales > Quotation' is visible. The main content area features a search bar with 'Quotation No.' as the search criteria, a 'Find' field, and a 'SEARCH' button. There are also controls for 'Sort' (set to 'Z-A'), 'Records' (set to '10'), and 'Pg No.'. Below the search bar, there are several filter options, all of which are checked: 'Quotation Date', 'Enquiry No', 'Courier Name', 'Company Name', 'Total Amount', 'Product Sub Total', 'Freight Charges', and 'GST Total'. A table with 14 columns is shown below the filters, but it is currently empty, displaying 'No records found.' The columns are: No., Qtn. No., Qtn. Date, Enquiry No, Courier Name, Company Name, Total Amt, Sub. Total, Freight, GST(%), Zone, Status, Qtn Follow Up, and Action. At the bottom of the page, there is a copyright notice: '© 2020 Swipfe ERP by Swipfe Infotech Pvt. Ltd.'

### Search and Filter Options

Users can search follow-up records using:

- Quotation Follow Up Number
- Follow Up Date
- Communication Type
- Company Name

## Additional Search Controls

Field	Description
Find	Search specific follow-up records
Sort	Arrange records alphabetically
Records	Number of records displayed
Page No.	Navigate between pages
Search	Execute search criteria

## Information Displayed

Field	Description
No.	Record sequence number
Quo. Follow Up No.	Follow-up reference number
Quo. Follow Up Date	Date of follow-up activity
Quo. No.	Associated quotation number
Company Name	Customer company name
Mode of Communication	Call, Email, Meeting, etc.
Feedback Type	Customer response category
User Zone	Assigned sales zone
Action	View/Edit follow-up details

## 8.Sales Order

### Purpose

Convert approved quotations into sales orders and track all confirmed customer orders.

The screenshot shows a web application interface for 'Swipfe Engineering Private Limited' with a 'Sales Order Creation' form. The form is divided into several sections:

- Quotation Number:** A search field with a 'SEARCH' button and a magnifying glass icon.
- Sales Order Details:** A grid of fields including 'Sale Order Number' (pre-filled with 'SO26060019'), 'Sale Order Date' (pre-filled with '13/06/2026'), 'Purchase Order No.', 'Purchase Order Date' (format: dd-mm-yyyy), 'Quotation Date', 'Enquiry No.', 'Enquiry Date', and 'Material Req. Date' (format: dd-mm-yyyy).
- Company Details:** Fields for 'Company Name', 'Add. Title', 'Address', 'Locality/Village', 'Taluka/City', 'Pincode', 'District', 'State', 'Contact Person Name', 'Code', 'Office Contact', and 'Office Email'.
- Discount:** A field for 'Discount'.
- Terms Of Delivery:** A field for 'Terms Of Delivery'.
- Payment Term:** A field for 'Payment Term'.
- Shipping Address Same As Billing Address:** Radio buttons for 'Yes' (selected) and 'No'.

Quotation Number      Select + Search

### User Actions

Only 3 actions:

#### 1. Select Quotation Number

Quotation No. ▼

[ SEARCH ]

#### 2. Review Data

(All fields displayed in read-only mode)

#### 3. Create Sales Order

[ CREATE SALES ORDER ]

Information already exists in:

Enquiry → Quotation → Sales Order

The user should never have to enter the same information twice.

The screenshot shows a web application interface for 'Swipfe Engineering Private Limited'. The main heading is 'Sales Order Creation'. Below the heading, there is a search field for 'Quotation Number' with a 'Please Select' dropdown and a 'SEARCH' button. The form is divided into three main sections: 'Sales Order Details', 'Company Details', and 'Shipping Address Same As Billing Address'. The 'Sales Order Details' section includes fields for 'Sale Order Number' (SO26060019), 'Sale Order Date' (13/06/2026), 'Purchase Order No.', 'Purchase Order Date' (dd-mm-yyyy), 'Quotation Date', 'Enquiry No.', 'Enquiry Date', and 'Material Req. Date' (dd-mm-yyyy). The 'Company Details' section includes fields for 'Company Name' (Please Select), 'Add. Title' (Please Select), 'Address', 'Locality/ Village', 'Taluka/ City', 'Pincode', 'District', 'State', 'Contact Person Name' (Please Select), 'Code', 'Office Contact' (Please Select), and 'Office Email' (Please Select). The 'Shipping Address Same As Billing Address' section has radio buttons for 'Yes' (selected) and 'No'. The form is styled with a light blue header and a clean, modern layout.

### User Flow

1. Open Sales Order List.
2. Click Create.
3. Select Quotation Number.
4. System fetches all quotation details automatically.
5. Enter only Purchase Order details if received from customer.
6. Click Create.
7. Sales Order is generated.

### Why This Module Exists

- Confirms customer order acceptance.
- Generates Sales Order Number.
- Creates base document for dispatch, invoicing, and production.

- Eliminates duplicate data entry.

## 9. Sales Order Status

### Purpose

Track the complete lifecycle of a Sales Order from creation to manufacturing, invoicing, and dispatch.

This screen helps users quickly know:

- Whether production is completed.
- Whether invoice is generated.
- Whether material is dispatched.
- Pending manufacturing quantity.
- Pending delivery quantity.

---

### User Flow

1. Enter or select Sales Order Number.
2. Click Search.
3. System fetches all related details automatically.
4. User reviews current order status.
5. Update status if required.
6. Save changes.

### Buttons

#### Search

Fetches Sales Order details and status.

#### Update

Updates current order status and progress.

#### Clear

Resets search and displayed information.

## 10. Terms of Delivery

The Terms of Delivery module is used to maintain standard delivery conditions that can be selected during Quotation, Sales Order, and Tax Invoice creation.

Instead of manually typing delivery conditions every time, users can select predefined delivery terms from the master list.

This ensures consistency across all sales transactions and reduces data entry effort.

### Business Requirement

Different customers may have different delivery arrangements such as:

- Free Delivery
- Freight Paid
- To Pay
- Self Pickup
- COD (Cash On Delivery)

## Examples

Delivery Term Meaning

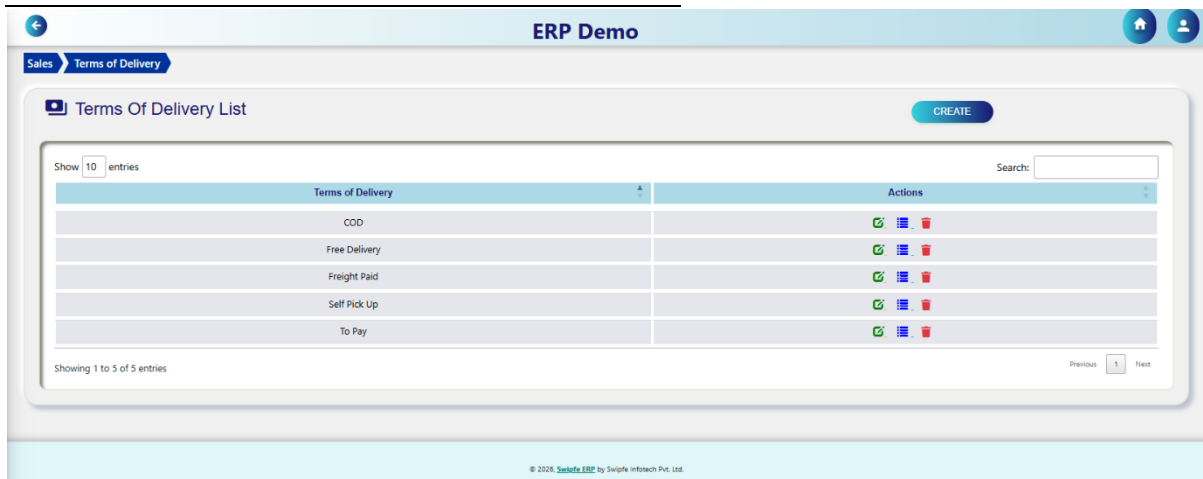
Free Delivery Supplier bears transportation cost

Freight Paid Freight already included in billing

To Pay Customer pays freight at destination

Self Pickup Customer collects material from supplier

COD Payment collected during delivery



## User Flow

View Delivery Terms

Users can view all available delivery terms maintained in the system.

Create New Delivery Term

Users can add a new delivery condition whenever required.

Edit Delivery Term

Users can modify existing delivery terms.

Delete Delivery Term

Unused delivery terms can be removed from the system.

Select During Transactions

The maintained delivery terms become available in:

- Quotation Creation
- Sales Order Creation
- Tax Invoice Creation

This module provides master data used across the entire Sales cycle:

- **Quotation → Sales Order → Tax Invoice → Dispatch Process.**

