# 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.**

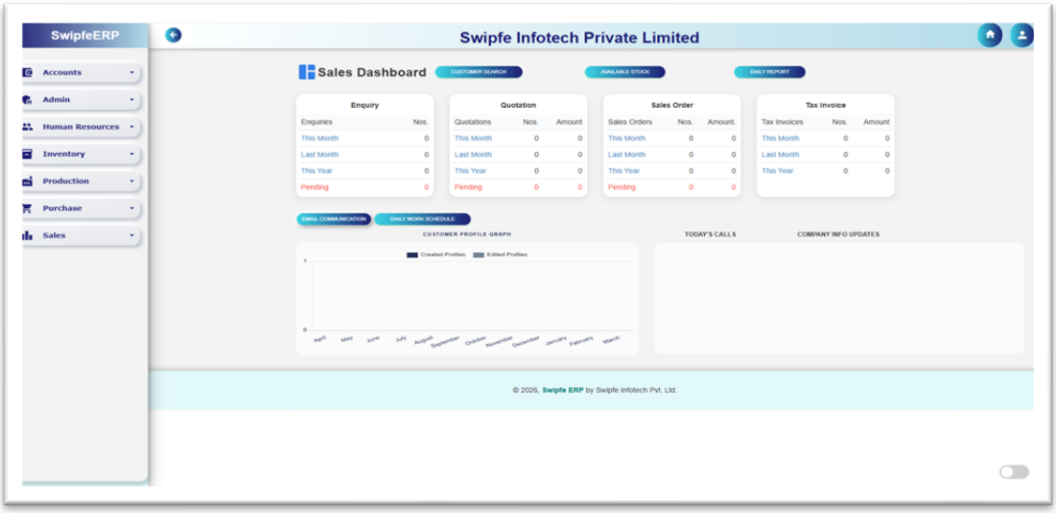
**Swipfe ERP is an all-in-one solution for managing core business operations efficiently.**

**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.



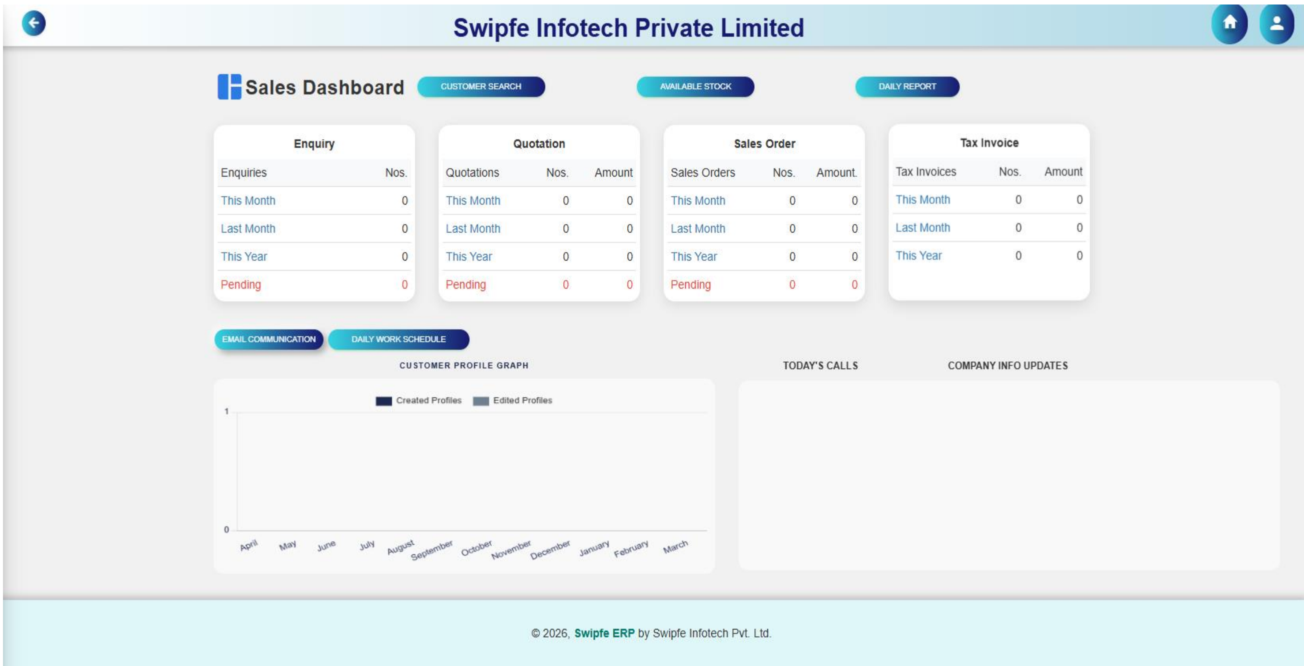

**Key Features**

- 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




## 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:**

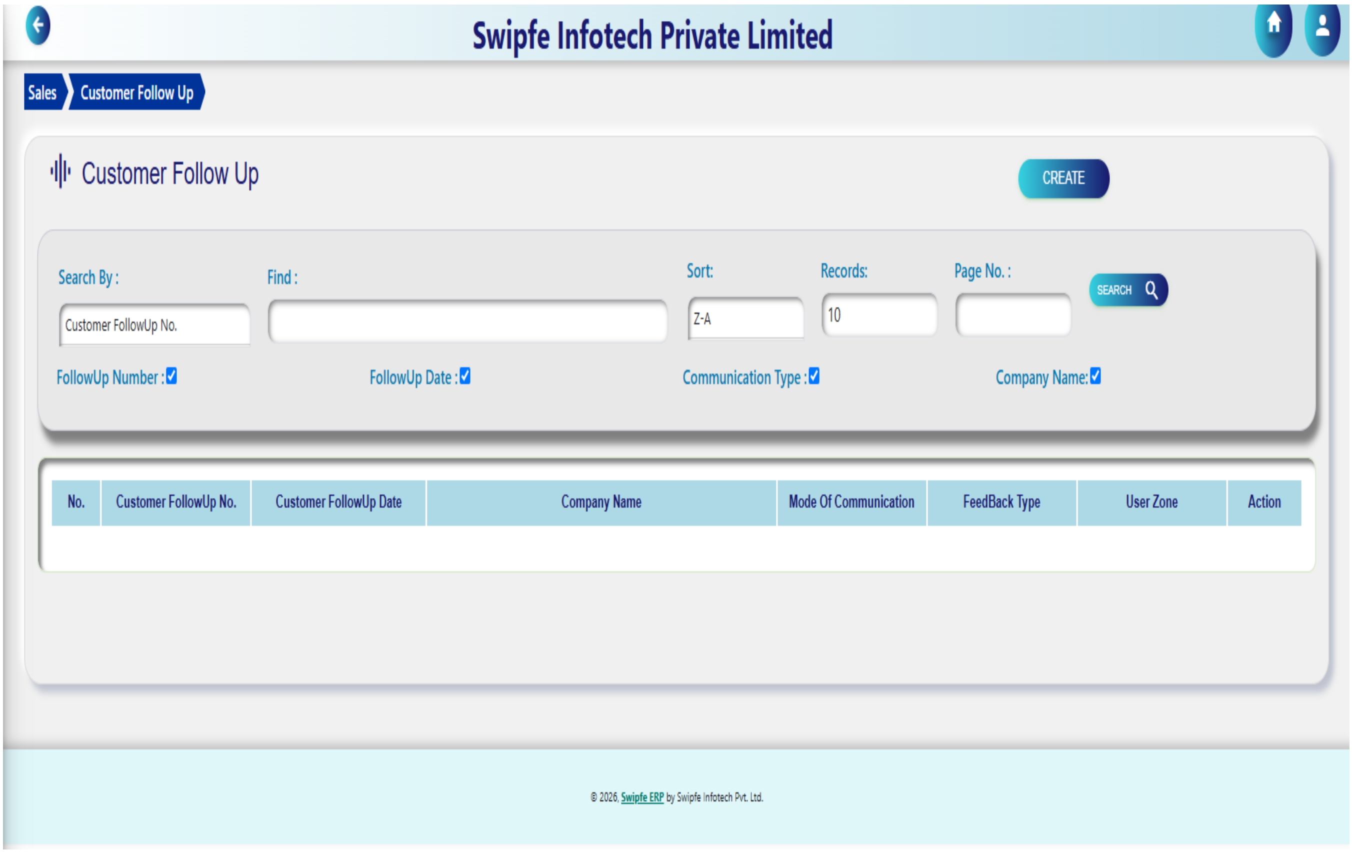
Click **Search**.

**Step 6:**

Review the displayed records.

**Step 7:**

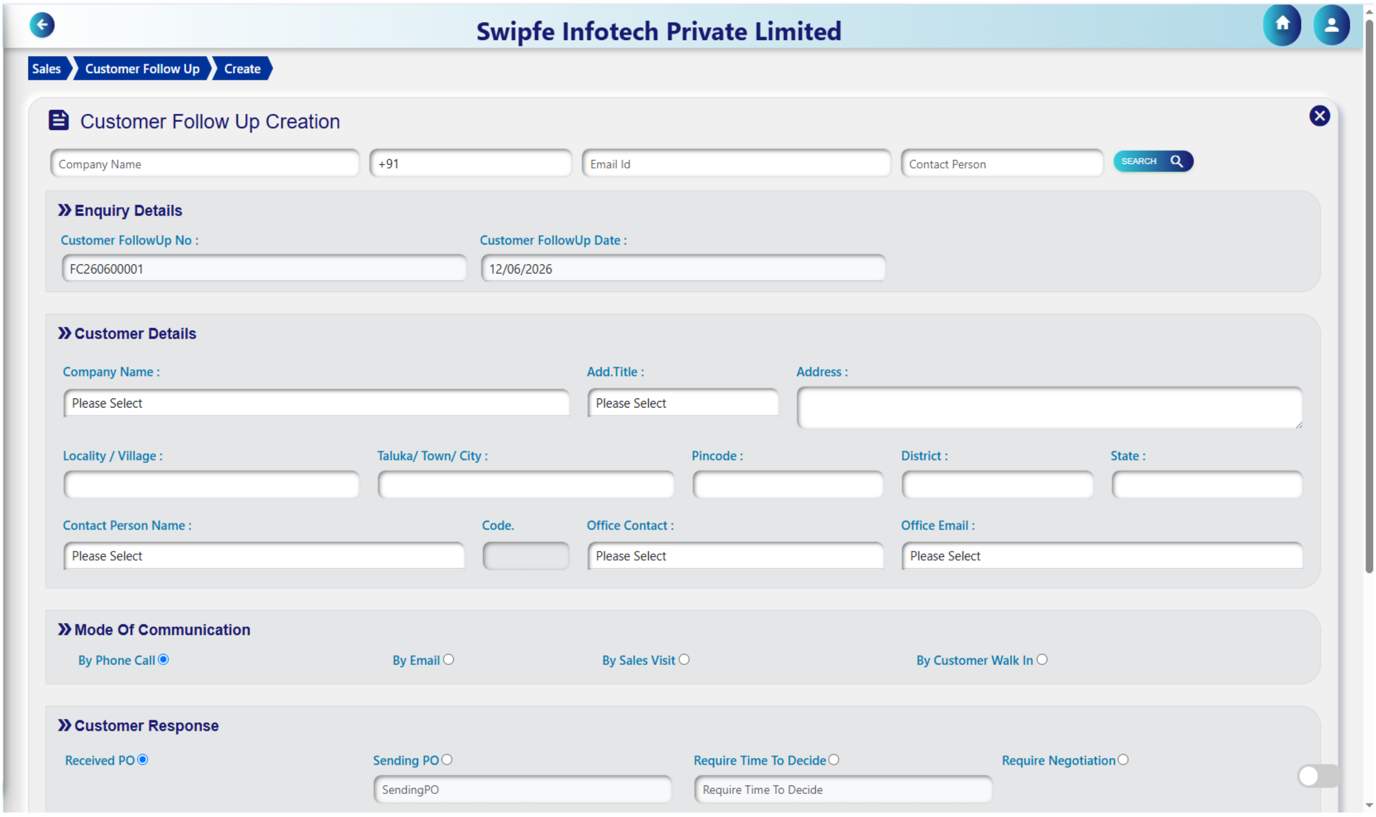
Use the Action button to view or modify the follow-up record.




**#Steps to Create Customer Follow Up**
**Navigate to:**

**Sales → Customer Follow Up → Create**

**Customer Search Section**




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 |

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**Customer Details**

This section displays or captures customer information.

**Fields**

| Field | Description |
|---|---|
| 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 |

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**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.

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**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.

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**Sending PO**

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

Additional Field:

- Sending PO Remarks

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**Require Time To Decide**

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

Additional Field:

- Require Time To Decide Remarks

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**Require Negotiation**

Indicates that the customer wishes to negotiate pricing or terms.

Additional Field:

- Negotiation Remarks

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**Not Interested**

Indicates that the customer is currently not interested.

Additional Field:

- Reason for Not Interested

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**Follow Up Required**

Indicates that further communication is necessary.

Additional Fields:

- Next Follow Up Date
- Follow Up Remarks

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**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:

| Field | Description |
| --- | --- |
| 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:

| Field | Description |
| --- | --- |
| 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 |

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**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:**

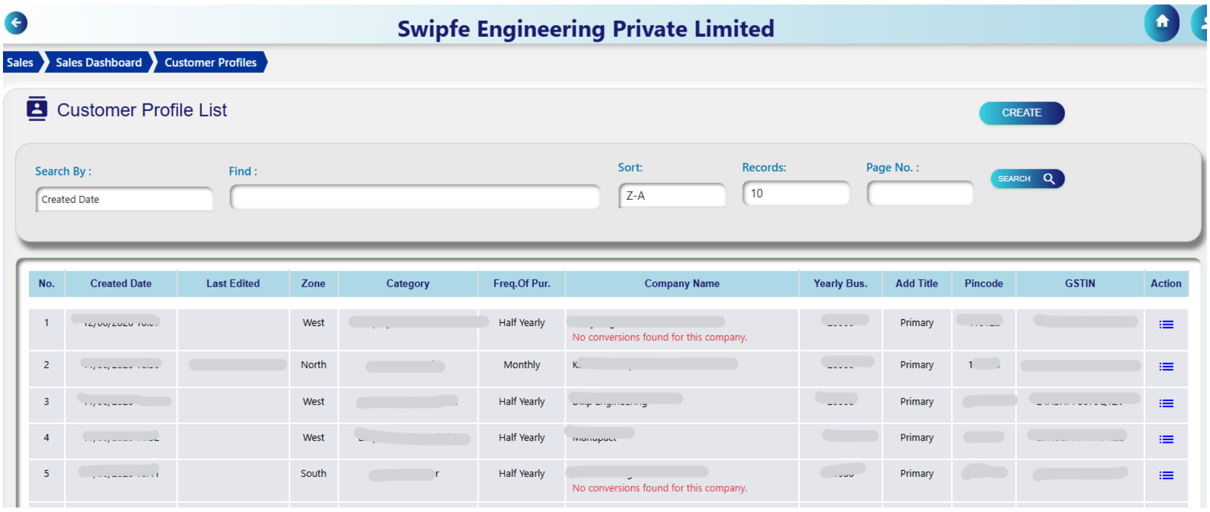
Click **Search**.

**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


**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

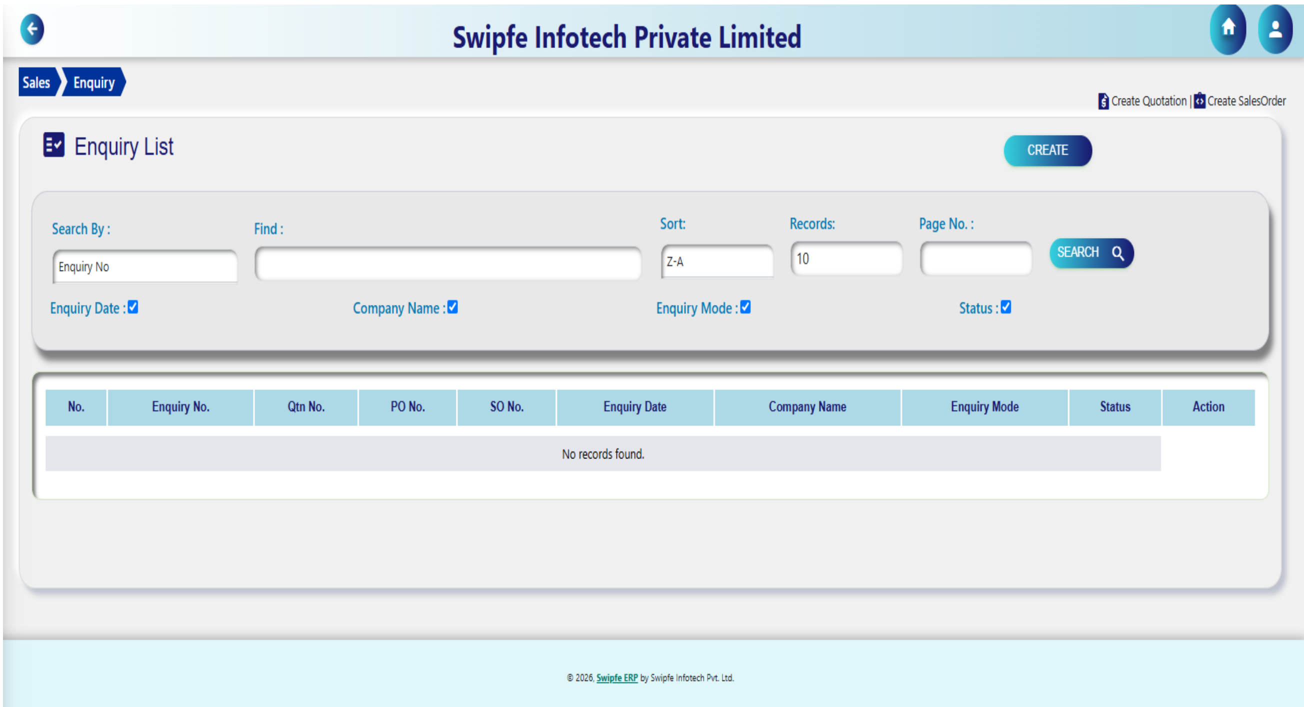
## Navigation Path

### 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




**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**

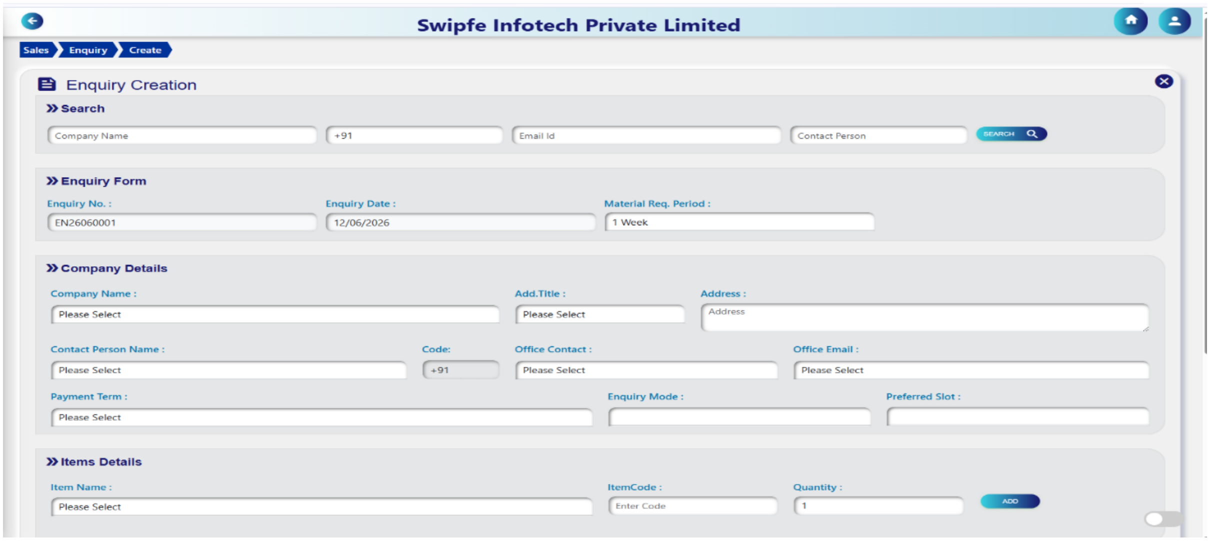
Click **Add** to include the item in the enquiry.

**Step 8**

Review all information.

**Step 9**

Click **Create** to save the enquiry.



## 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

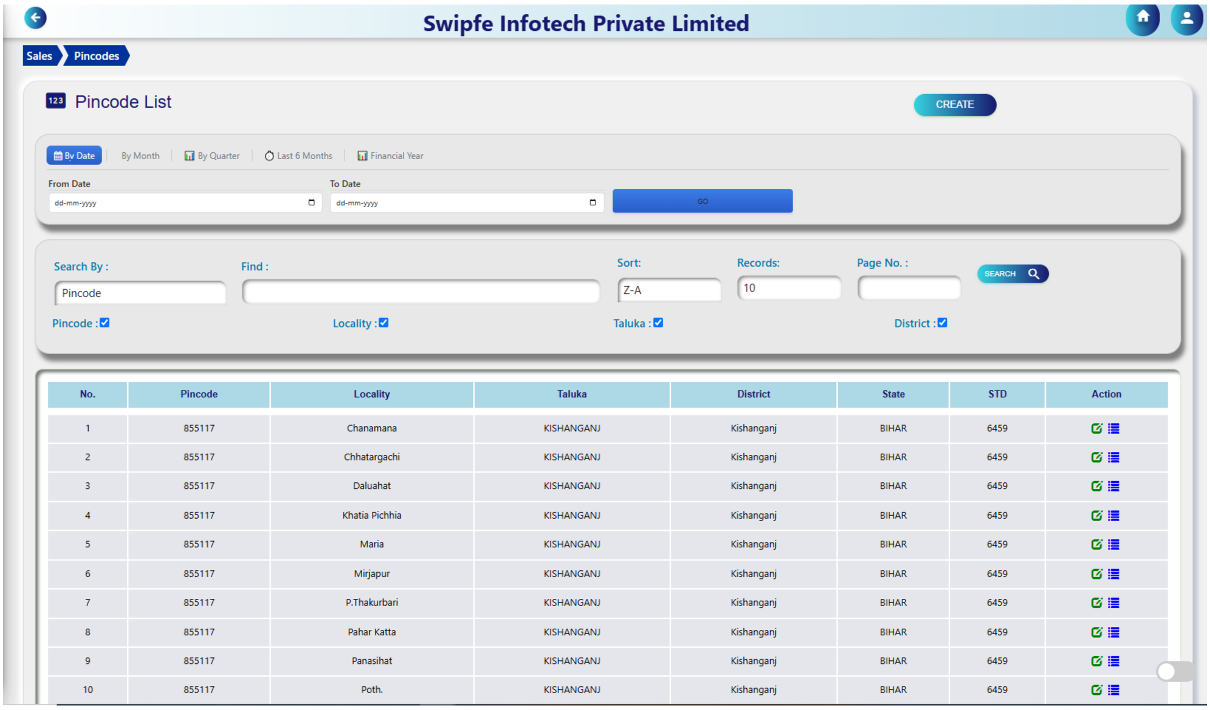
**Additional Filters**

- 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.


## 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

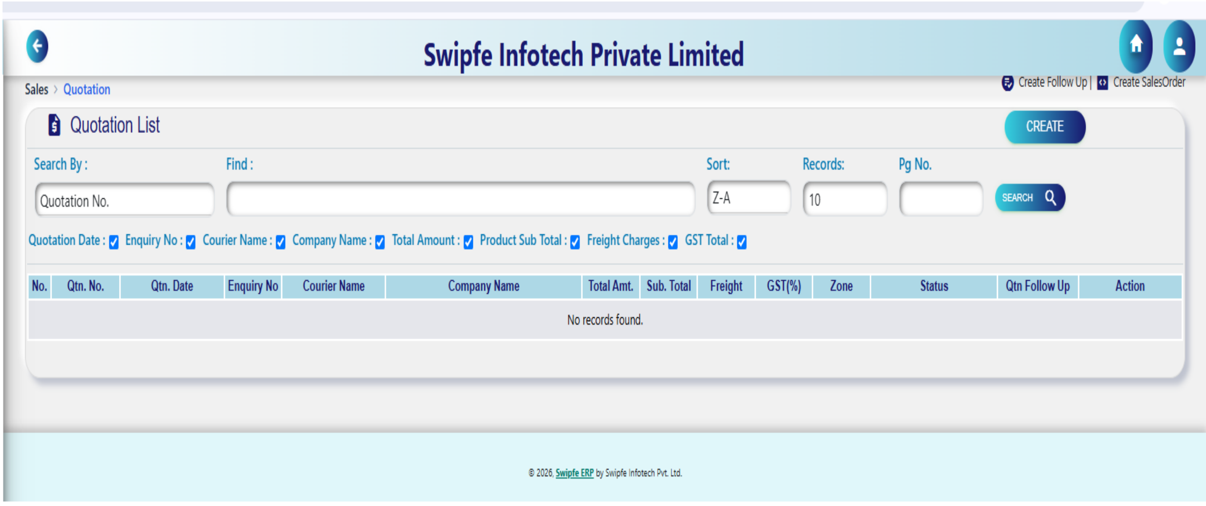
**Additional Actions**

**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**

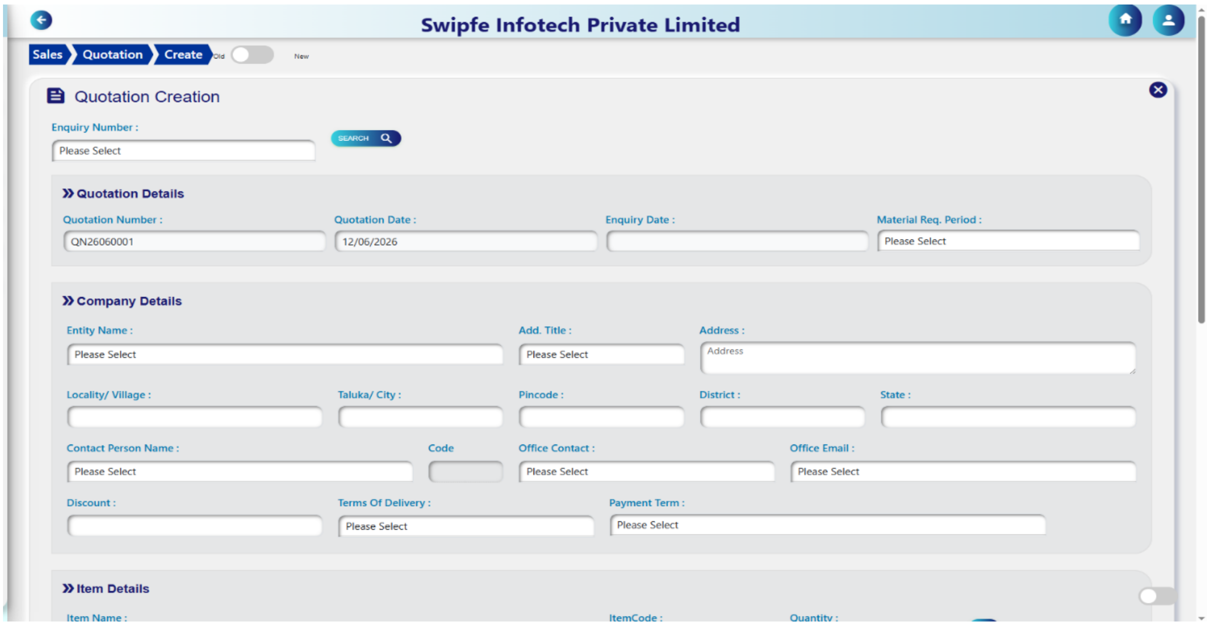
Verify freight charges, taxes, and total quotation value.

**Step 9**

Add any specific customer instructions, if applicable.

**Step 10**

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




## 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.

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**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

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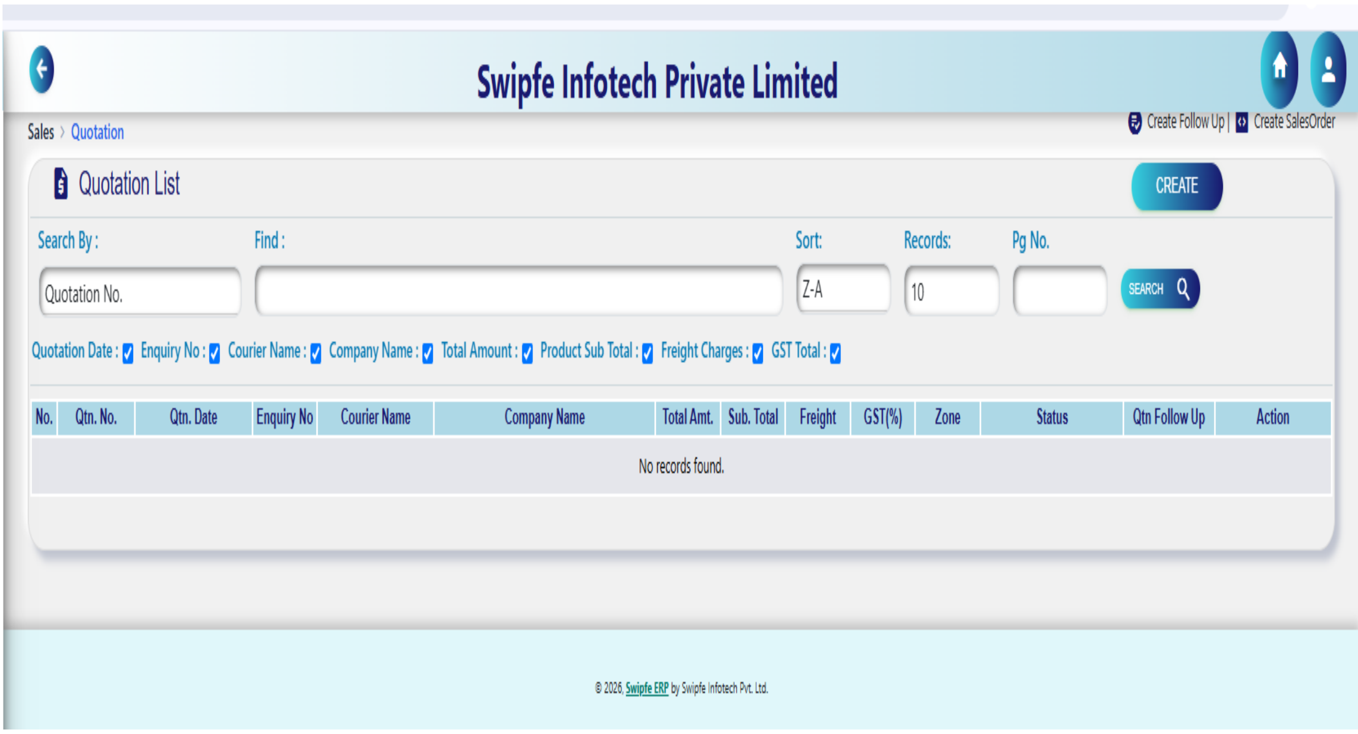



**Search and Filter Options**

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 |

---

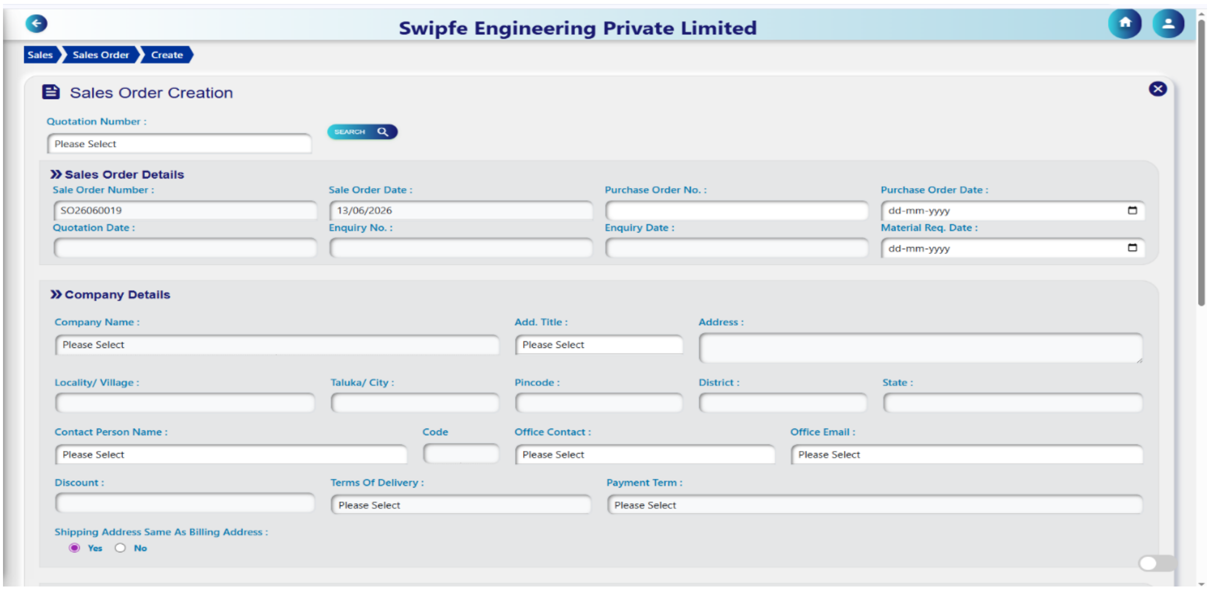
### Information Displayed

| 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.



Quotation Number Select + Search

**User Actions**

Only 3 actions:

**1. Select Quotation Number**

Quotation No. ▼
[ SEARCH ]

**2. Review Data**

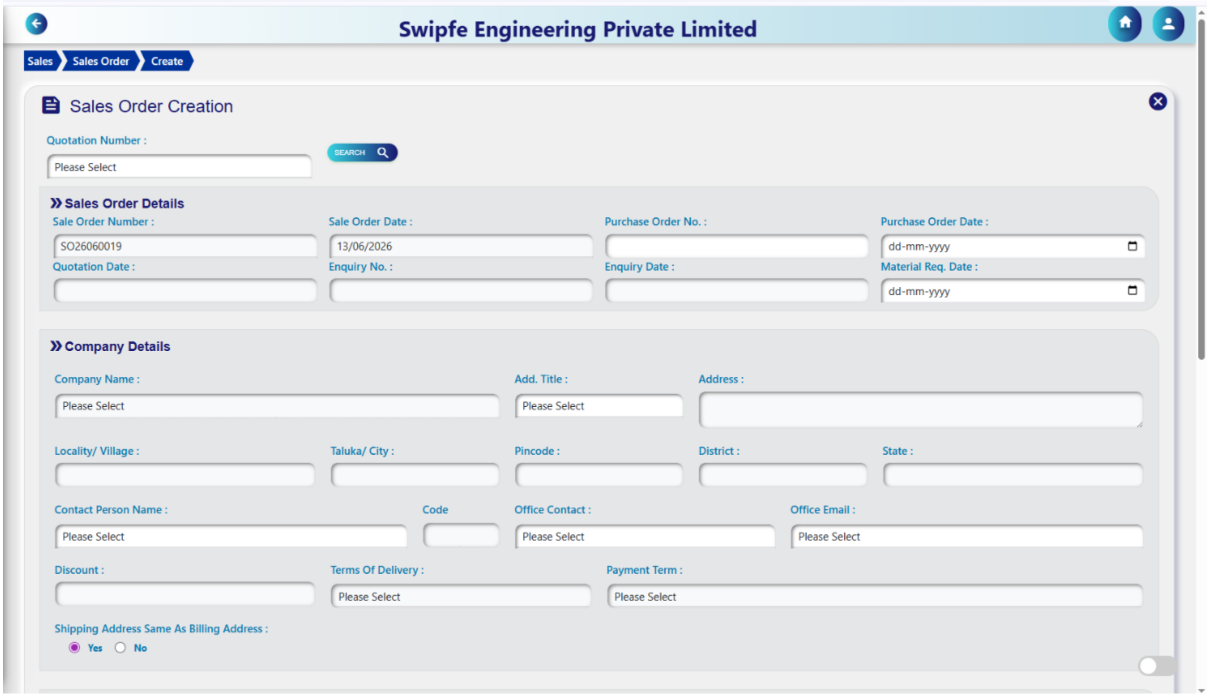
(All fields displayed in read-only mode)

**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.




**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.

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**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.

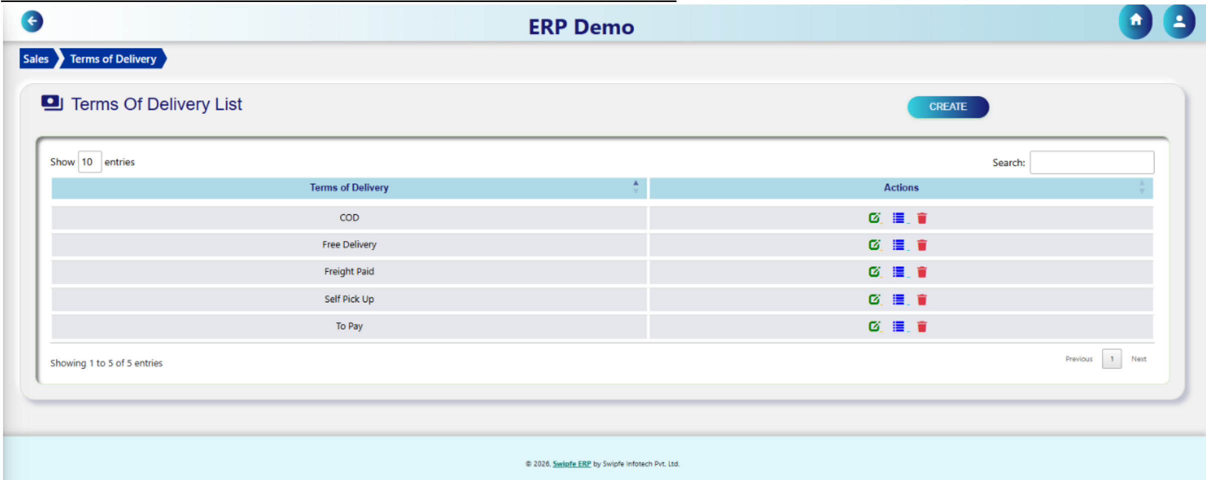
### Business Requirement

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**.