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**Your No.1 affordable and user friendly Enterprise Resource Portal (ERP) for Stock Management**

**POWERED**

**BY**

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**e-StockPro User Guide**

**LOGIN TO SYSTEM**

1. Type the URL of the software on your browser.
2. Provide username and password
3. Default admin login : admin and password

* **ADMINISTRATION**

**USER ACCOUNT**

To search for user account

1. Click on administration
2. Click on user account
3. Type the surname or first name of a user.
4. Click on search

**TO CREATE A NEW ACCOUNT**

1. Click on create new user account
2. Fill in the information (like Surname, First name, User name, Password etc
3. Select the access right control (Inventory, Warehouse, Accounting, Administration, etc.).
4. Click on create

**APP SETTING**

To set you application

1. Click on administration
2. Click on App setting
3. You will see edit application setting
4. Fill in the Name, Address, Telephone Number, Email and Website.
5. Then click on Edit

* *To change your logo*

Choose the logo and click on change logo

**DATABASE BACKUP**

To backup your database

1. Go to administration
2. Click on database backup
3. Then click on backup

Note: the backup file is found on;

**C:\xampp\htdocs\estockpro**

This is only applicable when the software is not deployed online. When deployed online, please contact your webmaster.

* **WAREHOUSE**

**TO CREATE NEW WAREHOUSE**

1. Click on warehouse
2. Click on add new warehouse
3. Type the warehouse name and location
4. Click on Add.

**TO ADD NEW ITEM TYPE**

1. Click on warehouse
2. Click on add new item type
3. Type the name
4. Click on Add.

**TO ADD NEW ITEM**

1. Click on warehouse
2. Click on Add new items
3. Fill in the information (like item name, item number, select item type, Quantity per unit, quantity, location, cost ,selling price (retail or wholesale) and Expiring Date)
4. Click on add

**TO MAKE ALL OR SOME OF THE ITEM QUANTITY AVAILABLE TO THE INVENTORY**

1. Click on warehouse
2. Click on move item to inventory icon beside the item
3. Enter the quantity to be move
4. Click on move to inventory.

* **INVENTORY**

**TO SEARCH FOR ITEM**

1. Click on inventory
2. Click on Items
3. Select the item type, the item name or item number
4. Click on filter

**TO SEARCH FOR INVOICE**

1. Click on inventory
2. Click on invoice
3. Select your search parameter: item category, date, period, year, invoice number, customer name or referral.
4. Then search

**TO CREATE NEW INVOICE**

1. Click on invoice
2. Click on create new invoice
3. Fill in the customer name and date
   * + L.P.O number and referral
     + Customer phone number
     + Item name, selling price, item price and discount.
     + Grand total and total amount paid in words
4. Click on submit

**TO SEARCH FOR SALES**

1. Click on inventory
2. Click on sales
3. Select your search parameter: item category, period, year, date, invoice number, customer name or referral.
4. Then search

**TO ADD NEW SALES**

1. Click on add new sales
2. Fill in the customer name and date
   * + Customer phone number
     + Item name, selling price, item price and discount.
     + Ground total and total amount paid
     + Balance and total amount paid in words
     + Select mode of payment (eg. Cash, cheque, bank, e-transfer, POS).
3. Click on submit

* **PURCHASE** (Expenditure)

**TO SEARCH PURCHASE**

1. Click on purchase
2. Either you Select purchase category or date and search or
3. Select period or year and search

**TO ADD NEW PURCHASE**

1. Click on purchase
2. Click on add new purchase
3. Add purchase name
4. Add purchase type
5. Add Supplier name, address and phone number
6. Add the quantity, the price and date
7. Click on add.

**TO ADD NEW PURCHASE TYPE**

1. Click on purchase
2. Click on add new purchase type
3. Add purchase name
4. Click on add

* **DEBTORS**

**TO SEARCH FOR A DEBTOR**

1. Click on inventory
2. Click on debtors
3. Either you select item category or receipt number and search or
4. Select the period and year and search or
5. Select customers name and search

* *To pay debt filter by receipt number and click on pay debt*

**TO SEARCH FOR DEBT PAYMENT HISTORY**

1. Click on inventory
2. Click on debt payment history
3. Select customer name and search or
4. Select the Period and year and
5. Click on search

**TO FIND INVENTORY LEDGER**

1. Click on inventory
2. Click on inventory ledger
3. Either you add date and search or
4. Select period and year and search or
5. Select receipts number and customer name.
6. Click on filter

* **ACCOUNTING**

**ADDING NEW CASH /CHEQUE ACCOUNT**

1. Click on Accounting
2. Click on New cash /Cheque Account
3. Add the Cash/Cheque Account Name
4. Click on create.

**PAYMENT VOUCHER**

1. Click on Accounting
2. Click on payment voucher
3. Add the date and service
4. Click on search to find a voucher
5. To add New Service
6. Click add new service
7. new service name
8. Click on add
9. To add New payment voucher
10. Click on new payment voucher
11. Add employee name
12. Add Month and Year
13. Add date, service, Amount, Cash/Cheque Account and Slip Number.
14. Check ground total
15. Click on submit

**CASH COLLECTION**

1. Click on accounting
2. Go to Cash collection
3. Add date and search
4. To add New Cash
5. Click on new cash
6. Add date, Amount, Received from, Receipt Number, Month and Year.
7. Click on add.

**BANK LODGMENT**

1. Click on bank lodgment
2. Add date and Bank
3. Click on search
4. To Add new Bank Lodgment
5. Click on add new bank lodgment
6. Add date
7. Add Bank Name
8. Add Credit
9. Add Cash/Cheque Account
10. Add reference
11. Add month and Year
12. Then click on Add
13. To Add new Bank
14. Click on add new bank
15. Type bank name
16. Click on Add.

**BANK WITHDRAAL**

1. Click on account
2. Click on Bank withdrawal
3. Type date and Bank
4. Click on search
5. To Add new Bank withdrawal
6. Click on add new Bank withdrawal
7. Add date
8. Add Bank Name
9. Add Credit (if any)
10. Add Cash/Cheque Account
11. Add reference
12. Add month and Year
13. Then click on Add

**GENERAL LEDGER**

1. Click on account
2. Click on general ledger
3. Fill in month and year
4. Click on search