STOCKPILOT

REF · SP-GUIDE · EN

USER GUIDE

Manage your stock, quotes, delivery notes and invoices, step by step.

Stock | Quotes | Delivery notes | Invoices | Stock take

ÉTIQUETTE · SP-DOC

stockpilot.cloud

November 2026 edition

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01 WELCOME TO STOCKPILOT

SP-01

> StockPilot is an online program for shops and trading companies in Morocco. It runs in your browser (computer, tablet or phone): nothing to install.

With StockPilot you can:

- record your products, prices and stock;
- make quotes, delivery notes and invoices as PDF with your logo;
- track what your customers owe you and remind them on WhatsApp;
- order from your suppliers and bring the goods into stock;
- count your stock (stock take) and see your monthly figures.

THE PATH OF A SALE

QUOTE → DELIVERY NOTE → INVOICE → PAYMENT

THE PATH OF A PURCHASE

SUPPLIER ORDER → MARK AS RECEIVED → STOCK GOES UP → SUPPLIER PAYMENT

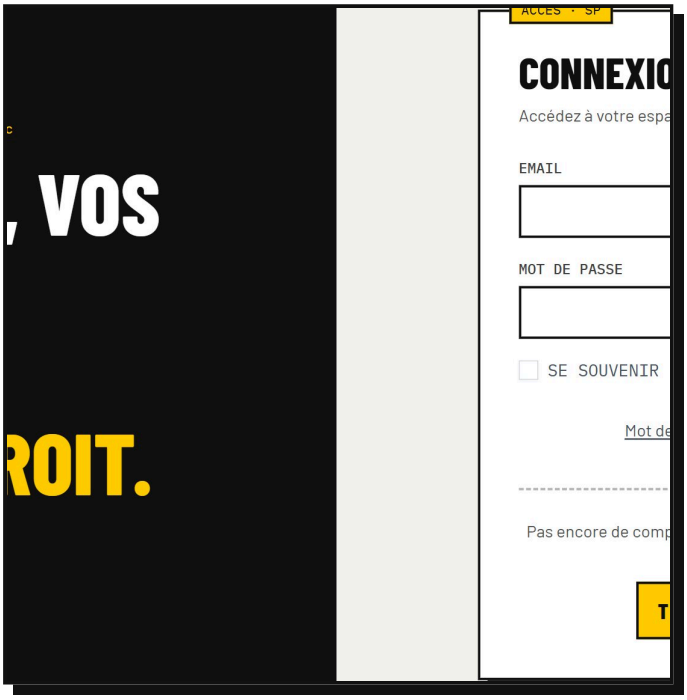
TIP In this guide, words in grey such as `Enregistrer` are the buttons exactly as they appear on screen. The app screens are shown in French; just click the button with the same name.

02 LOGGING IN

SP-02

> Your administrator gives you an email and a password. Keep them to yourself.

1. Open your browser (Chrome, Safari, Edge…) and type **stockpilot.cloud**.
2. Click `Se connecter` at the top right.
3. Type your **Email** and **Mot de passe** (password), then click `SE CONNECTER`.
4. Tick **Se souvenir de moi** (remember me) on your own computer so you do not retype the password every time.



The login page.

IMPORTANT Forgot your password? Ask your company's administrator: they can set a new one in **Administration › Utilisateurs**.

TIP You can try StockPilot without an account: on the website, click `Tester la démo`. Demo data is fictitious and reset every night.

03 THE MAIN SCREEN

SP-03

After logging in, you land on the dashboard. It sums up your activity for the month.

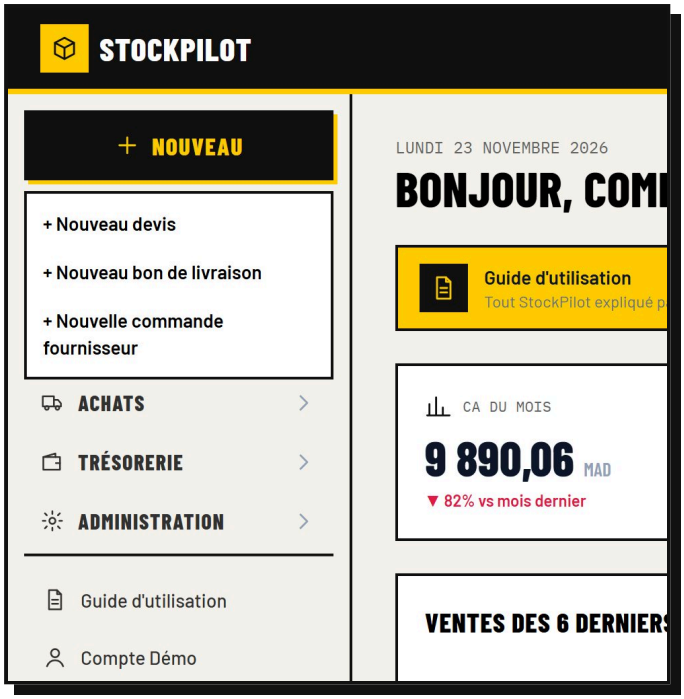


The dashboard: menu on the left, monthly figures in the middle.

CA du mois (sales this month)	Total of this month's invoices including VAT, compared with last month.
Encaissé ce mois (collected)	The money received from your customers this month.
Impayés (unpaid)	What customers still owe you. Click to see the invoices.
Stock bas (low stock)	Products that have fallen below their alert threshold.
À encaisser (to collect)	Invoices to be paid, late ones in red. The green button opens WhatsApp to send a reminder.

THE MENU

The left menu is organised in groups: **Catalogue** (products), **Ventes** (sales), **Achats** (purchases), **Trésorerie** (cash) and **Administration**. Click a group to open it.



The **Nouveau** button creates a quote, a delivery note or a supplier order in one click.

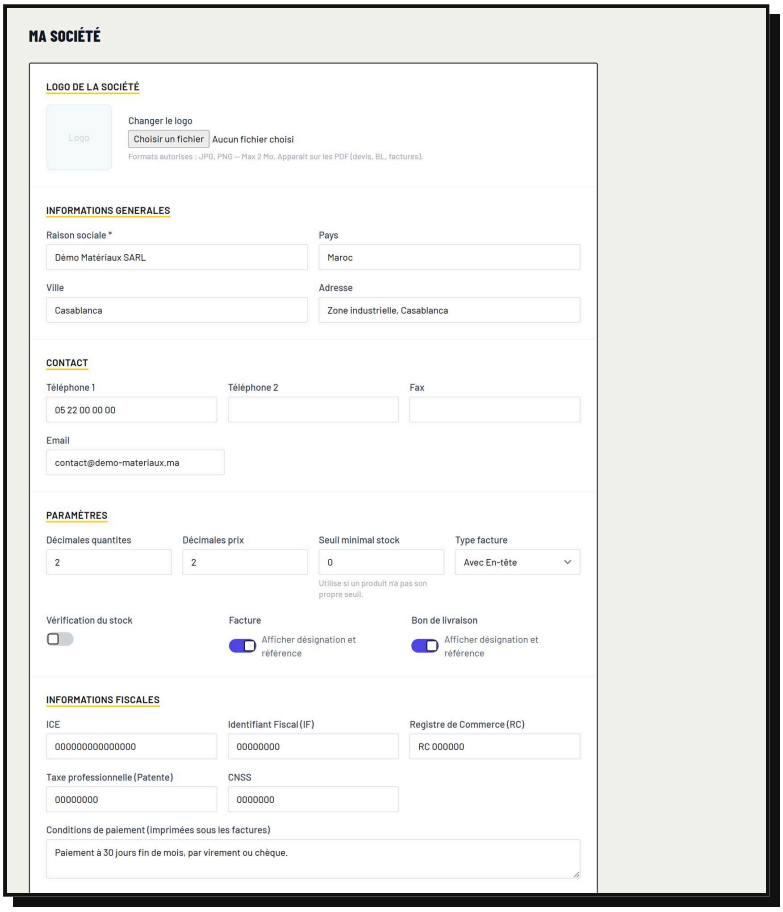
- At the top right: the moon switches to **dark mode**, the globe changes the **language** (Français, English, العربية), and **Déconnexion** logs you out.
- On a phone the menu is hidden: tap the ☰ button at the top left to open it.

04 FIRST SETUP: MA SOCIÉTÉ (YOUR COMPANY)

SP-04

> Done once, by the administrator. This information appears on all your PDFs.

1. Open **Administration › Ma société**.
2. **Logo**: click `Choisir un fichier` and choose your logo (JPG or PNG, 2 MB maximum).
3. Fill in the company name, city, address, phone numbers and email.
4. **Tax information**: ICE, IF, RC, business tax (Patente) and CNSS. They are printed on your invoices.
5. **Payment terms**: for example “Payment within 30 days by bank transfer”. They are printed under every invoice.
6. Check the **default VAT rate** (usually 20%) then click `Enregistrer`.



The Ma Société page.

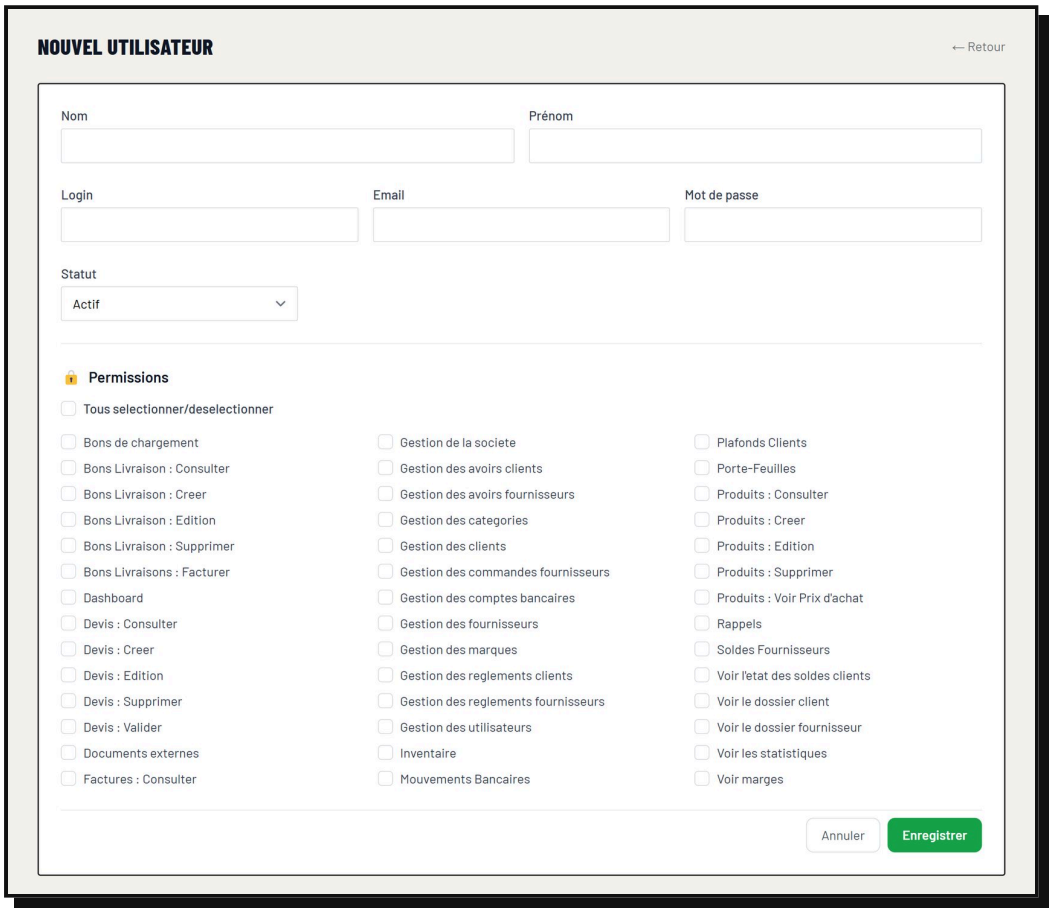
Type facture (invoice type)	**Avec En-tête**: StockPilot prints your logo and details. **Sans En-tête**: for paper already printed with your letterhead.
Vérification du stock	When on, StockPilot refuses a delivery note or an invoice if there is not enough stock.
Seuil minimal stock	Alert threshold used for products that have no threshold of their own.
Décimales	Number of digits after the decimal point for quantities and prices.
Menu latéral (side menu)	At the bottom of the page: rename or reorder the menu links for your team.

05 ADDING YOUR EMPLOYEES

SP-05

> Each employee has their own account. You choose exactly what they can see and do.

1. Open **Administration › Utilisateurs** then click `+ Nouvel Utilisateur`.
2. Type the last name, first name, a login, the email and a password.
3. Leave **Statut** on **Actif** (choose **Inactif** to block a former employee without deleting them).
4. Tick the **permissions** they need, then `Enregistrer`.



The new user form and its permissions.

`Salesperson`	Devis (Consulter, Créer), Bons Livraison (Consulter, Créer), Produits : Consulter, Gestion des clients.
`Storekeeper`	Produits (Consulter, Créer, Edition), Inventaire, Gestion des commandes fournisseurs.
`Accountant`	Factures : Consulter, Gestion des règlements clients et fournisseurs, Mouvements bancaires, Voir les statistiques.

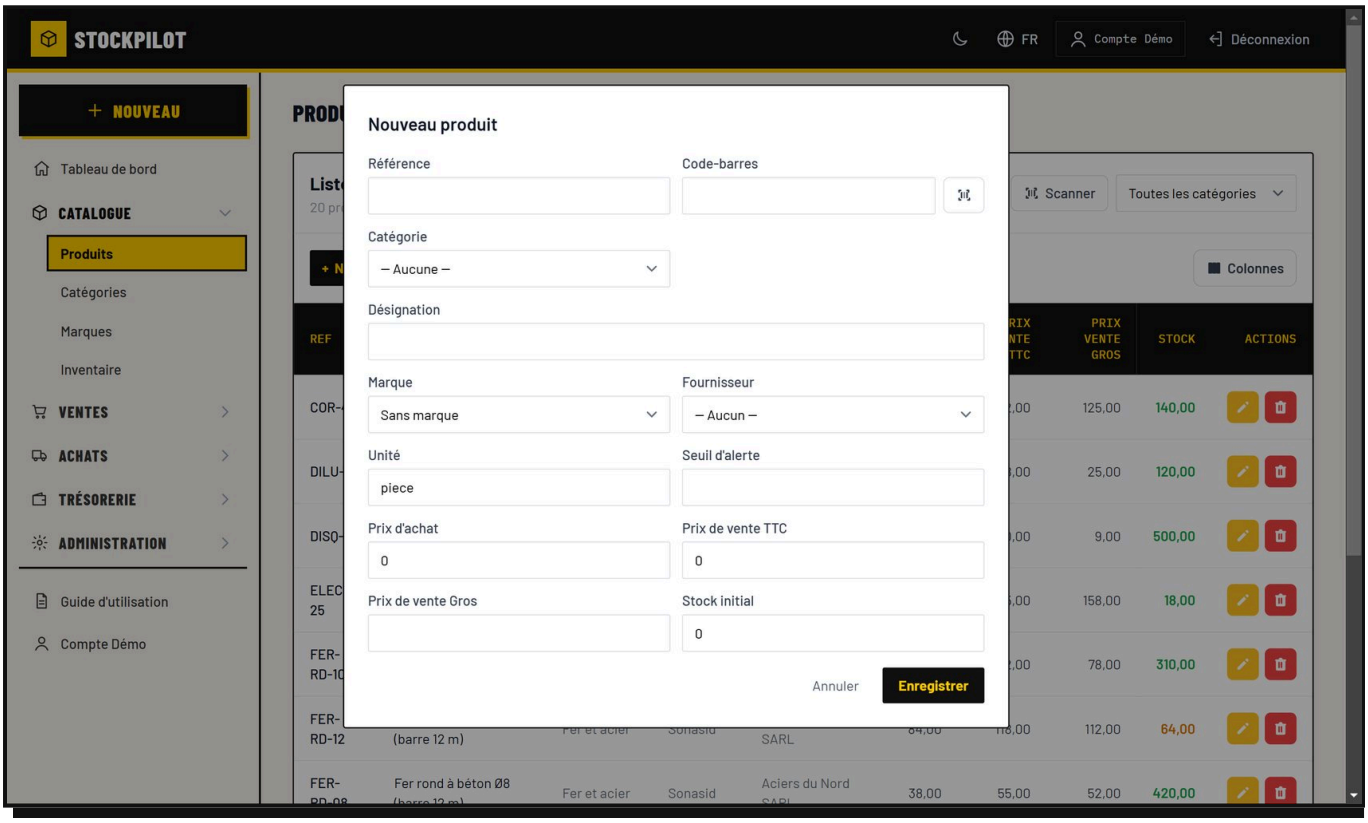
TIP To keep your margins private, do not tick **Produits : Voir Prix d'achat** or **Voir marges** for salespeople.

06 YOUR PRODUCTS

SP-06

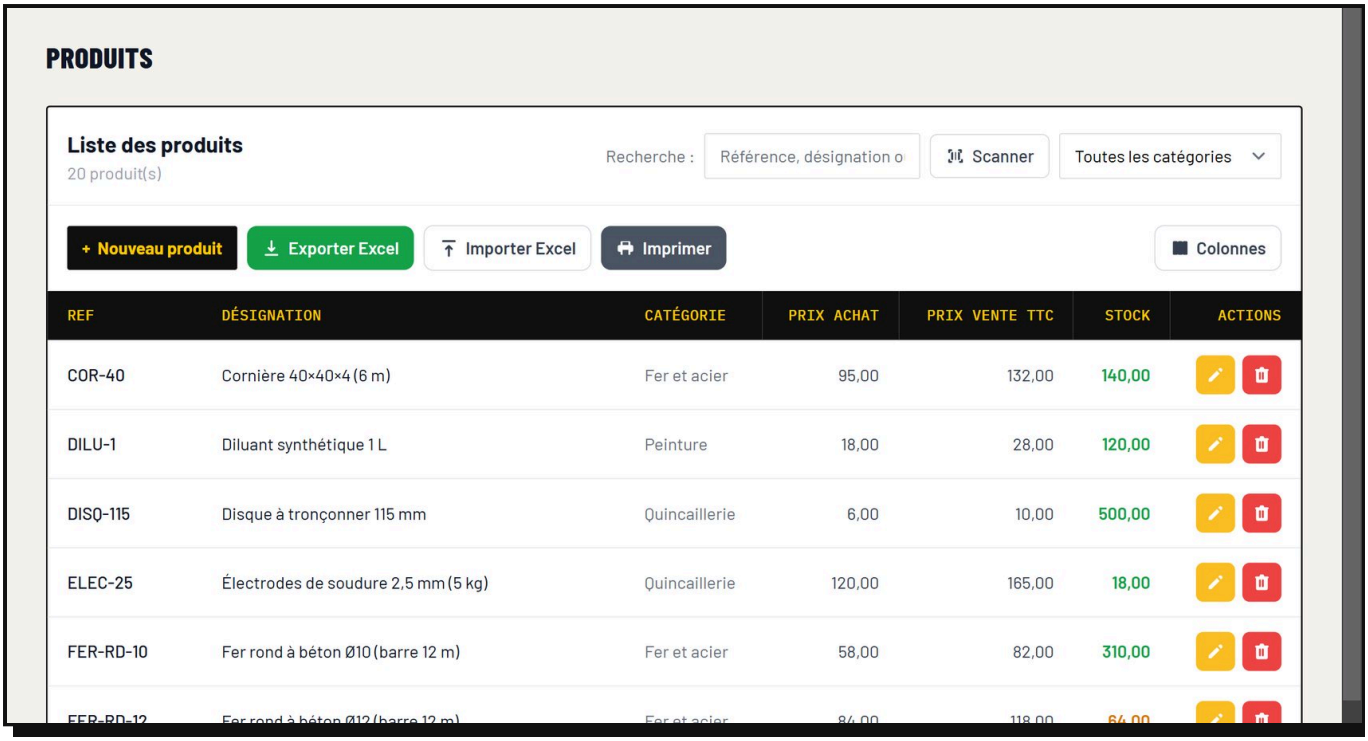
> Start by creating your categories (Catalogue › Catégories), then add your products.

1. Open **Catalogue › Produits** then click `+ Nouveau produit`.
2. Fill in the **Référence** (a unique code, for example FER-10) and the **Désignation** (the product name).
3. Choose the category, brand, supplier and unit (piece, bar, m², box…).
4. Enter the **Prix d'achat** (purchase price), the **Prix de vente TTC** (selling price including VAT) and, if you sell wholesale, the **Prix de vente Gros** (also including VAT).
5. Enter the **Stock initial** and the **Seuil d'alerte** (the minimum stock before you are warned), then `Enregistrer`.



The new product form.

IMPORTANT Selling prices are entered **including VAT (TTC)**. In quotes and invoices StockPilot works out the price before VAT and adds the VAT: the customer's total matches your catalogue price.



The product list: stock in green, orange when it gets low, red at zero.

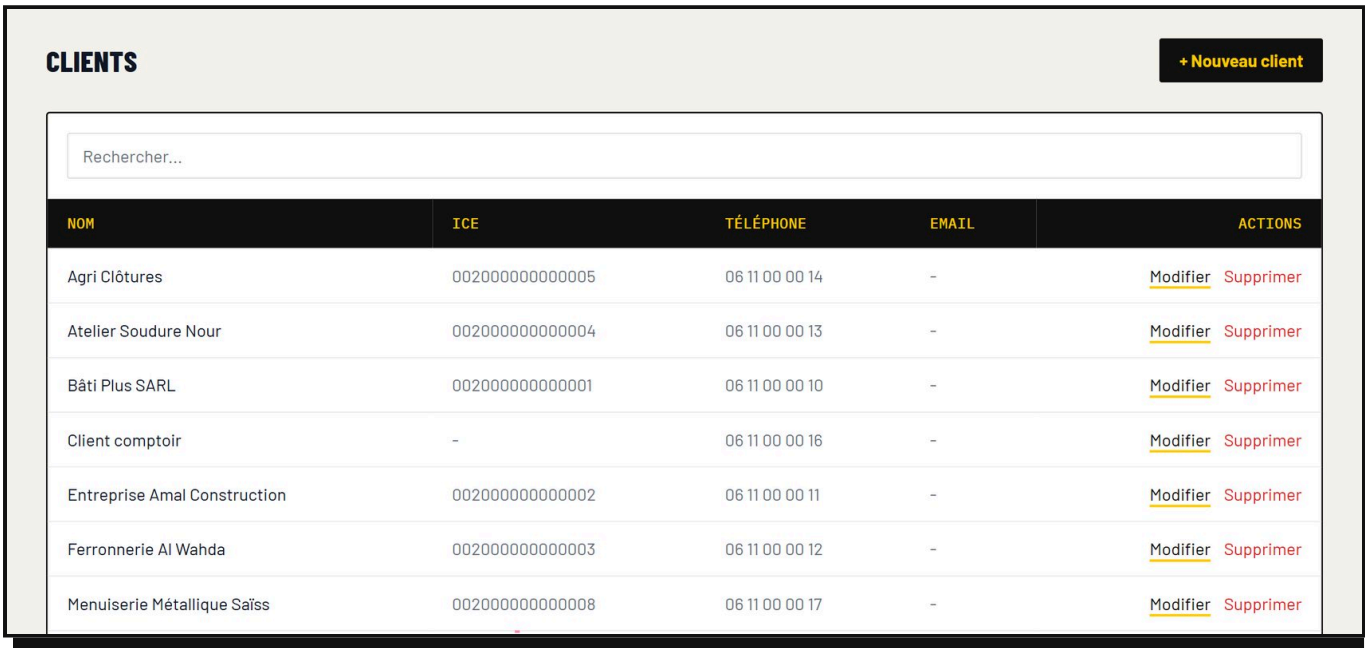
- **Scanner**: find a product by its barcode (phone camera or scanner).
- **Exporter Excel**: downloads the list. **Importer Excel**: adds many products at once. Export first to get the right file template, fill it in, then import it.
- **Colonnes**: show or hide columns (brand, supplier, wholesale price).

07 CUSTOMERS AND SUPPLIERS

SP-07

> A complete customer record means a complete invoice and a one-click WhatsApp reminder.

1. Open **Ventes › Clients** then `+ Nouveau client`.
2. Type the name, the **ICE** (required to invoice a company), the **phone**, the email and the address.
3. **Plafond de crédit** (credit limit, optional): the maximum amount a customer may owe you.
4. Click `Enregistrer`.



The customer list.

TIP Enter the customer's mobile number (06… or 07…): it is used by the WhatsApp `Relancer` button.

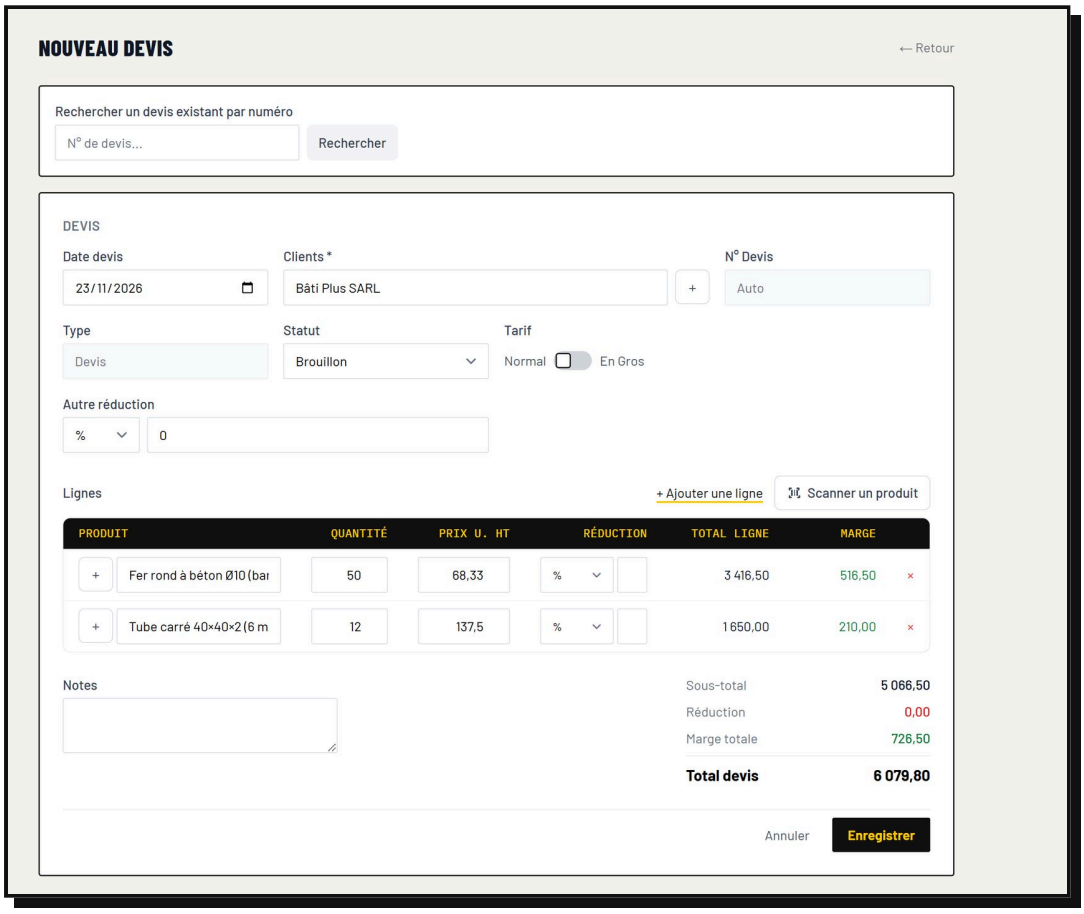
Suppliers are created the same way in **Achats › Fournisseurs**. In **Soldes clients** and **Soldes fournisseurs** you see who owes what; a customer's **file** gathers all their documents.

08 MAKING A QUOTE

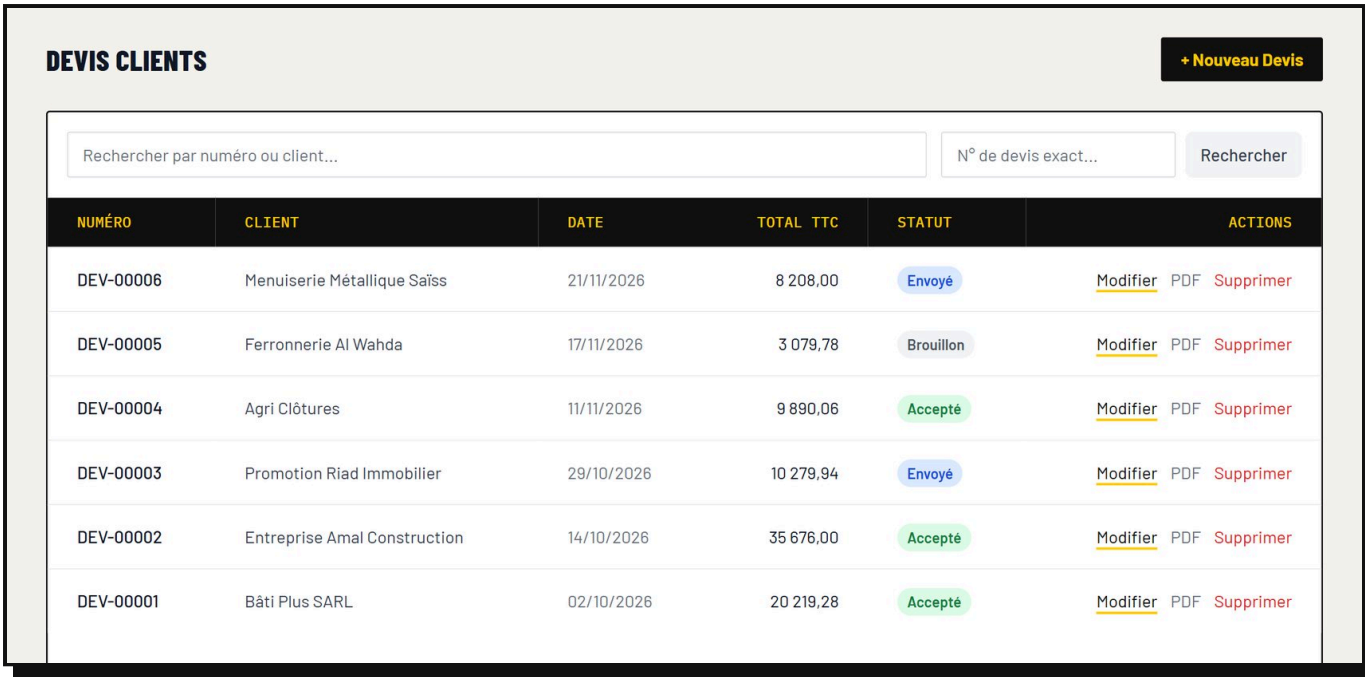
SP-08

> A quote is the price proposal sent to the customer. It does not touch the stock.

1. Click **Nouveau** then **Nouveau devis** (or **Ventes › Devis › + Nouveau Devis**).
2. Choose the **customer** by typing their name. New customer? Click the **+** button next to it.
3. In **Lignes**, type the product name or reference, pick it with the ↑ ↓ arrows then Enter (or with the mouse).
4. Type the **quantity**. The **prix U. HT** (unit price before VAT) fills in by itself; you can change it and add a line **discount** (% or amount).
5. **+ Ajouter une ligne** for another product. **Tarif : En Gros** applies your wholesale prices to every line.
6. Check the total then click **Enregistrer**.



A quote with two lines: the total including VAT is calculated for you.



The quote list: **PDF** to print it or send it.

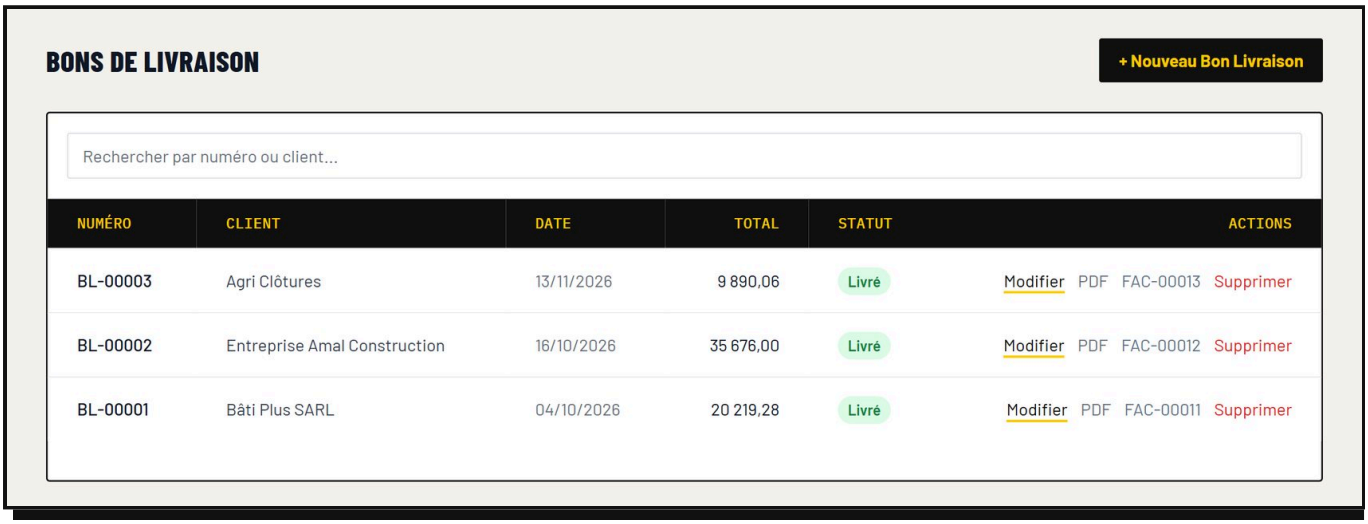
- **Status**: Brouillon (draft), Envoyé (sent), Accepté (accepted) or Refusé (refused), so you know where each quote stands.
- The customer agrees? Click **Convertir en BL**: the delivery note is created with the same lines.

09 DELIVERING: THE DELIVERY NOTE

SP-09

> The delivery note (BL) travels with the goods. It is what takes products out of stock.

1. Create the BL from a quote (`Convertir en BL`) or with **Ventes › Bons de livraison › + Nouveau Bon Livraison**.
2. Check the lines. Untick **Afficher les prix sur le bon de livraison** if the driver must not see the prices.
3. `Enregistrer`, then print with `PDF`.
4. When the goods leave, click `Marquer livré`: the quantities come out of stock.



Delivery notes and their actions.

IMPORTANT Stock goes down when the BL becomes **Livré** (delivered). If you edit or delete a delivered BL, StockPilot corrects the stock automatically.

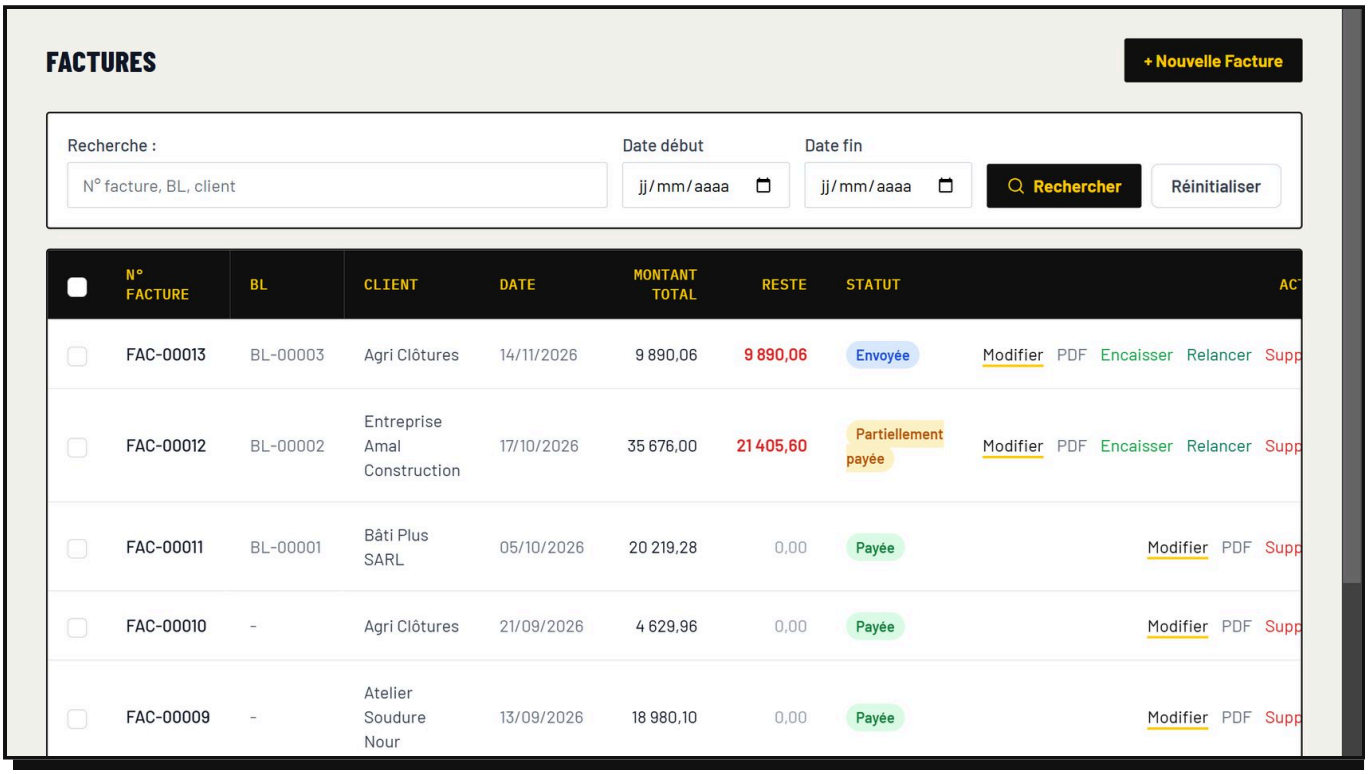
TIP **Bons de chargement** (loading slips, in Ventes): group several BLs in the same truck. This module is switched on or off in Ma Société.

10 INVOICING

SP-10

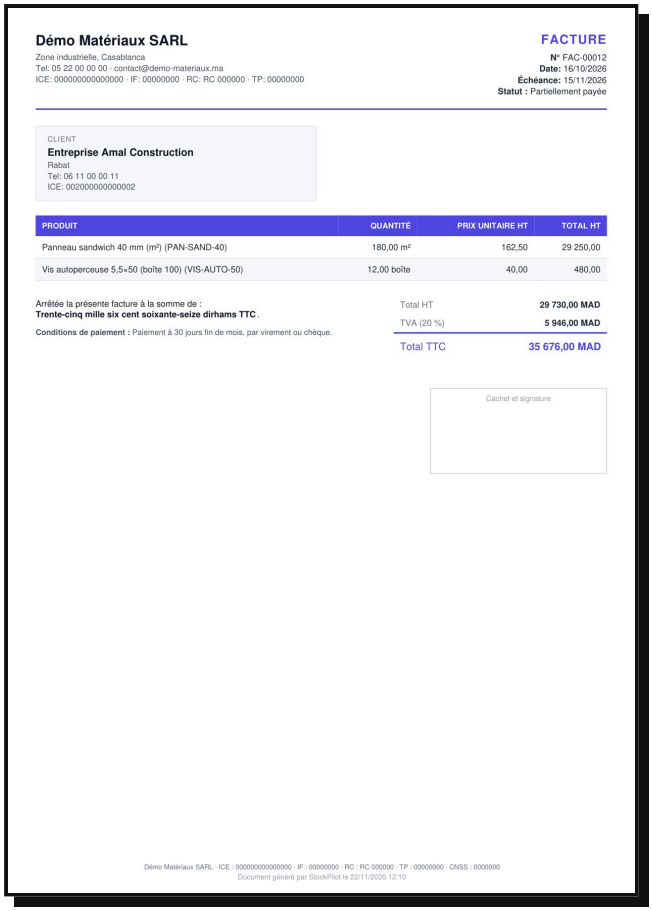
> The invoice is the official document for your customer and your accountant.

1. In **Bons de livraison**, on a delivered BL, click **Facturer**: the invoice is filled with the BL lines.
2. Check the date and the **due date** (payment deadline), then **Enregistrer**.
3. Click **PDF** to print it or send it to the customer.



The invoice list: the amount still due is in red.

Direct sale without a delivery note? Use **+ Nouvelle Facture**. In that case products come out of stock when the invoice is saved. An invoice made from a BL does not take stock out a second time.



Démo Matériaux SARL
Zone industrielle, Casablanca
Tel: 05 22 00 00 00 · contact@demo-materiaux.ma
ICE: 000000000000000 · IF: 00000000 · RC: RC 000000 · TP: 00000000

FACTURE
N° FAC-00012
Date: 16/10/2026
Échéance: 15/11/2026
Statut : Partiellement payée

CLIENT
Entreprise Amal Construction
Rabat
Tel: 06 11 00 00 11
ICE: 002000000000002

PRODUIT	QUANTITÉ	PRIX UNITAIRE HT	TOTAL HT
Panneau sandwich 40 mm (m²) (PAN-SAND-40)	180,00 m²	162,50	29 250,00
Vis autoperceuse 5,5×50 (boîte 100) (VIS-AUTO-50)	12,00 boîte	40,00	480,00

Arrêtée la présente facture à la somme de :
Trente-cinq mille six cent soixante-seize dirhams TTC.

Conditions de paiement : Paiement à 30 jours fin de mois, par virement ou chèque.

Total HT	**29 730,00 MAD**
TVA (20 %)	**5 946,00 MAD**
Total TTC	**35 676,00 MAD**

Cachet et signature

Démo Matériaux SARL · ICE : 000000000000000 · IF : 00000000 · RC : RC 000000 · TP : 00000000 · CNSS : 0000000
Document généré par StockPilot le 22/11/2025 12:10

The PDF invoice: ICE, IF, RC, VAT, total including VAT and the amount in words.

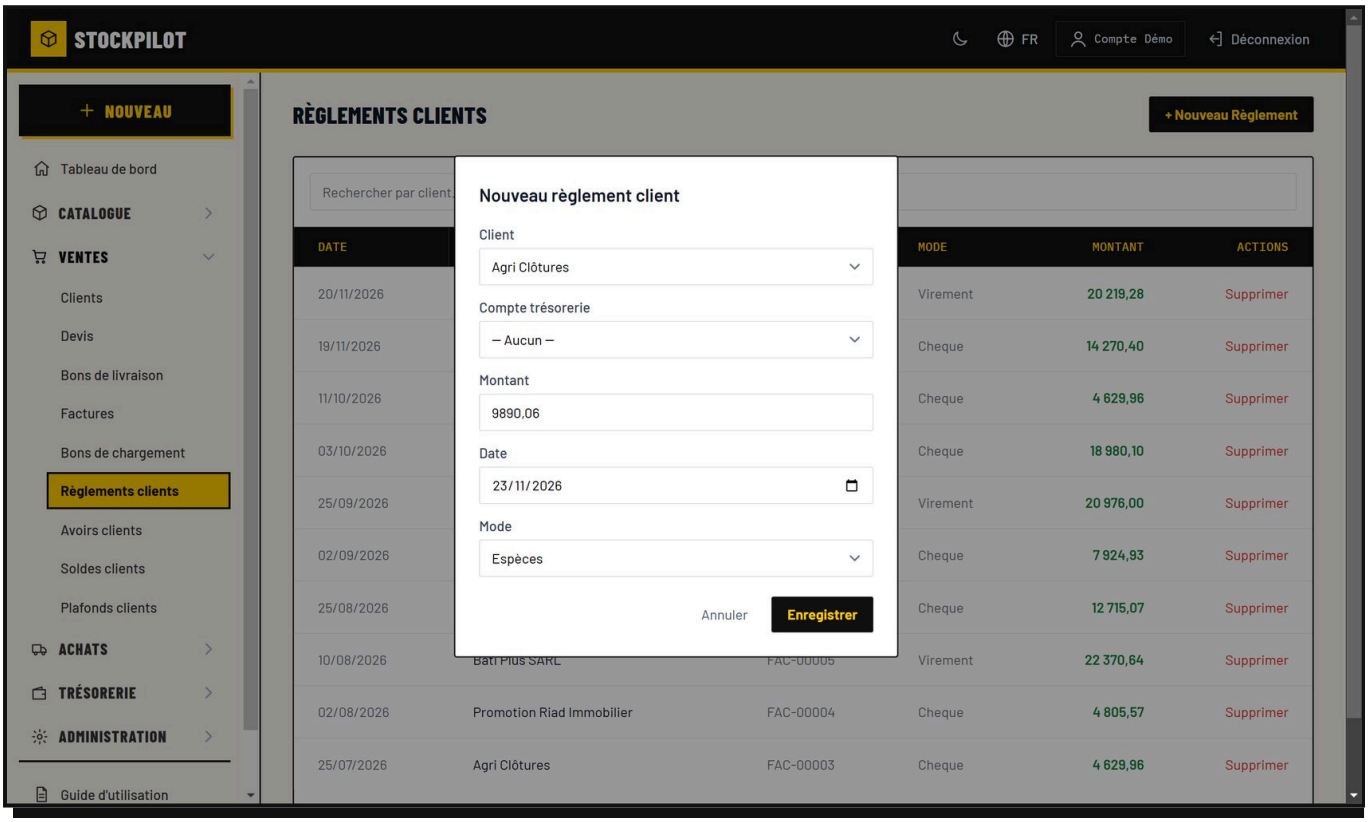
Brouillon / Envoyée (draft / sent)	The invoice is made, nothing has been paid yet.
Partiellement payée (partly paid)	The customer has paid part of it.
Payée (paid)	Everything is settled.
En retard (late)	The due date has passed and money is still owed.

11 COLLECTING PAYMENTS AND REMINDERS

SP-11

> Every customer payment is recorded: you always know who owes you how much.

1. In **Factures**, click **Encaisser** next to the invoice.
2. Choose the **account** (cash box or bank), the **amount** received, the **date** and the **method**: cash, cheque, transfer or card.
3. For a cheque, type its number. Click **Enregistrer**: the invoice status updates.



Recording a customer payment.

REMINDERS ON WHATSAPP

On an unpaid invoice, click **Relancer** (or the green icon on the dashboard). WhatsApp opens with a polite message already written: invoice number, amount, amount due and due date. You read it and send it.

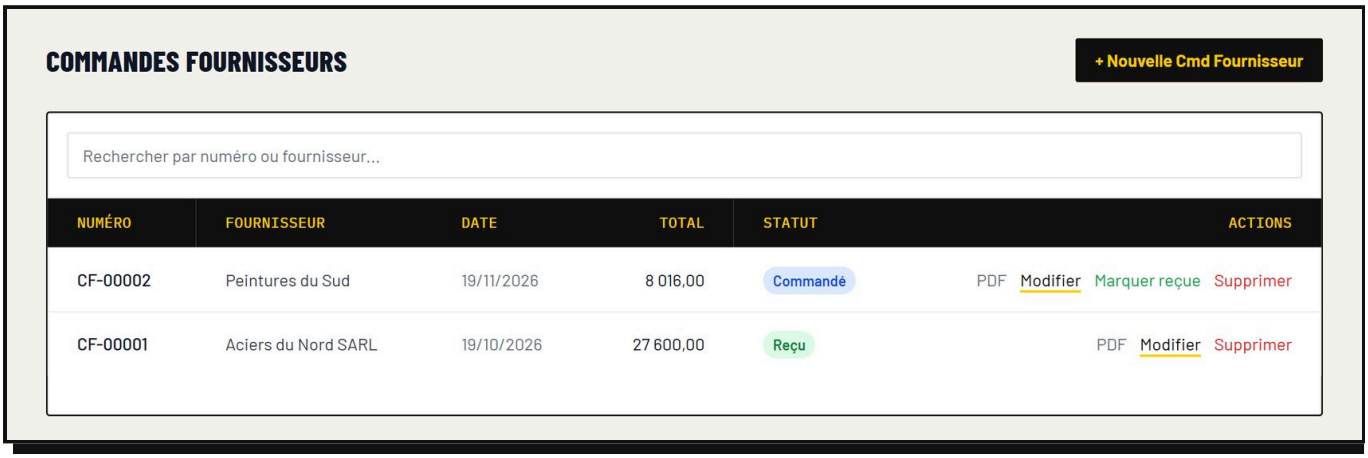
> **TIP** **Avoirs clients** (credit notes): for returned goods or a discount after invoicing. **Plafonds clients**: see the customers who are over their credit limit.

12 BUYING FROM YOUR SUPPLIERS

SP-12

> The supplier order brings goods into your stock when you receive them.

1. Open **Achats › Commandes fournisseurs** then `+ Nouvelle Cmd Fournisseur`.
2. Choose the supplier, add the products, quantities and purchase prices, then `Enregistrer`.
3. When the goods arrive and you have checked them, click `Marquer reçu`: the stock goes up by itself.



Supplier orders.

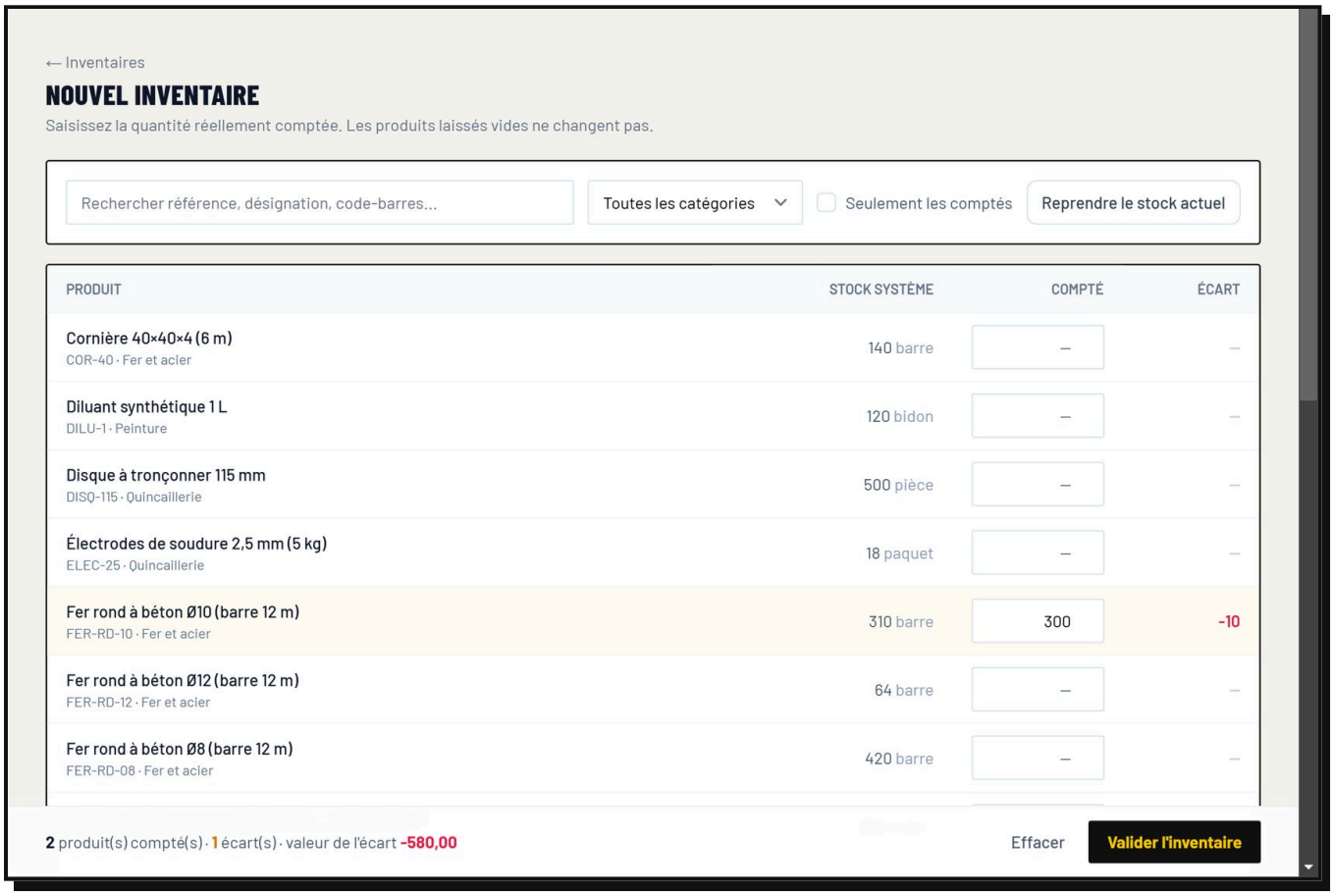
To pay a supplier: **Règlements fournisseurs**. To follow your cheques and bills to pay with their due dates: **Trésorerie › Chèques / effets fournisseurs**.

13 DOING A STOCK TAKE

SP-13

> Count what is really in your store; StockPilot fixes the differences.

1. Open **Catalogue › Inventaire** then `+ Nouvel inventaire`.
2. Filter by category or search for a product. In the **Compté** (counted) column, type the quantity you actually found.
3. The **gap** appears: OK in green, red if products are missing, blue if there are extra.
4. Products left empty do not change. `Reprendre le stock actuel` fills the empty boxes with the stock in the program.
5. Click `Valider l'inventaire`: the stock becomes the counted quantity and the stock take is kept in the history.



A stock take in progress: the bottom bar sums up the gaps.

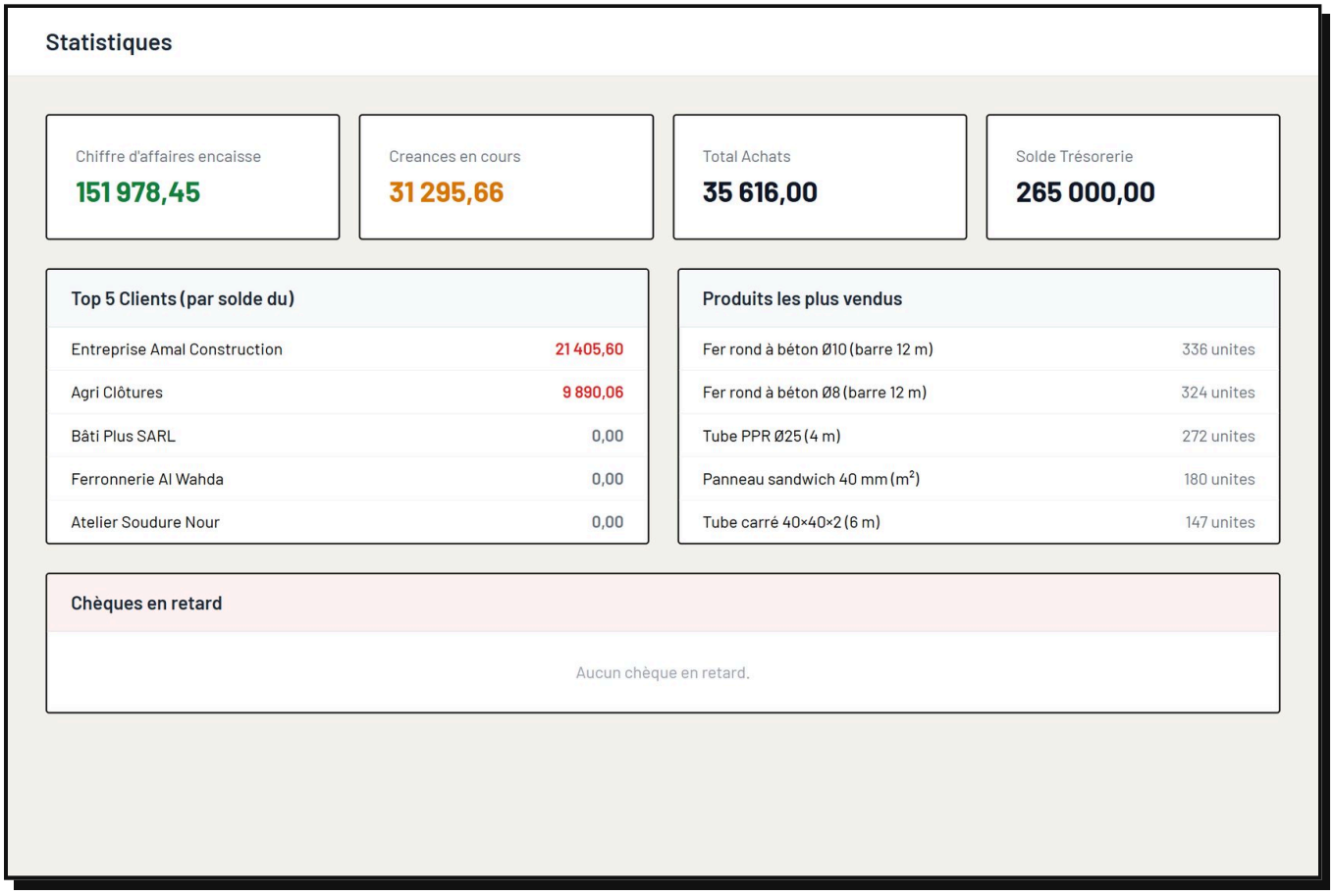
TIP Count category by category, at a quiet time (before opening or in the evening).

14 CASH, STATISTICS AND TOOLS

SP-14

> Follow your money and your figures at a glance.

Comptes bancaires (bank accounts)	Your bank accounts and their balance.
Portefeuilles (cash boxes)	Your cash boxes (cash money).
Mouvements bancaires	All money in and out, in one place.
Statistiques	Best customers, best-selling products, purchases and late cheques.
Rappels (reminders)	Note a task with a date so you do not forget it.
Documents externes	Keep your contracts, received invoices and receipts online.



The Statistics page.

15 FREQUENTLY ASKED QUESTIONS

SP-15

Q01 Stock did not go down after a sale.

The BL must be **Livré**: click `Marquer livré`. An invoice made from a BL does not lower the stock a second time.

Q02 "Suppression impossible" (cannot delete) appears.

The product or customer is used in a quote, a BL or an invoice. Delete or edit those documents first. This protects your history.

Q03 Why is the price in the quote different from the product price?

The quote shows the price **before VAT (HT)**; VAT is added in the total. The total including VAT matches your selling price (give or take a few centimes because of rounding).

Q04 Can I work on my phone?

Yes. Open stockpilot.cloud in your phone's browser and tap ☰ for the menu.

Q05 Can several employees work at the same time?

Yes, each with their own account. Each company only sees its own data.

Q06 Is my data backed up?

Yes. An automatic backup copy is made every night on the server.

NEED HELP?

Message us on WhatsApp at **+212 676 035 777** or visit **stockpilot.cloud**.