

Introduction

Thank you for choosing mSupply.

Before you launch in (if you haven't already!), we suggest you plan to take the following steps.

- Read the rest of this introduction.
- Read the setup, tutorial and license chapters in this manual.

Please note that installation requires basic computer skills:

- You need to be able to locate a file using the “open” and “save” windows.
- If you are not sure, why not try, and email us if you get stuck.

mSupply is designed to handle the following tasks:

- Recording quotations received from various suppliers in a way that makes for easy comparison of true cost prices.
- Create tenders for suppliers to respond to.
- Ordering (Purchasing) of items from a particular supplier, using actual usage figures to calculate the required quantities.
- Entering of incoming goods into inventory.
- Manufacturing items. That is, building new items from raw materials in your stock.
- Tracking Accounts Payable and Accounts Receivable
- Issuing of invoices for customers, and recording the transaction against inventory.
- Customers are able to order on-line via the internet, and can view stock status and the status of their orders.
- Exporting purchase and invoice data for import into an accounting program.
- Reporting on transactions and other data in almost any manner you want!
- If you need help with installing mSupply please feel free to email us at info@msupply.org.nz

About this user guide

The latest and most authoritative version of this User Guide is located on-line at <http://docs.msupply.org.nz/>. You can export the chapter you're viewing in PDF format by clicking the **export:pdf** tab to the right. It may then be viewed off-line within Acrobat Reader or other PDF viewer. To obtain the whole user guide in PDF format, visit [mSupply site](#)

If you are reading a PDF version, it is likely that a more up-to-date version is available on-line.



The software is under constant development as new features and facilities are added. We strive to ensure that the user guide and the graphics that it contains reflect these developments, but occasionally you may find that there are differences between the program itself and the guide or its graphics, where the updating of the guide has not quite kept pace with the development of the software. These are usually of a minor nature, but should you have any difficulties, do please send us an e-mail with details of your problem.

It should also be noted that with the considerable range of preferences and user



permissions, a particular user's window may have features included or omitted (according to their preferences and their permissions) when compared with the screenshots appearing in the guide.

As mSupply is compatible with both Windows OS and Apple Mac OS, there is a mix of screenshots in the manual taken from each operating system.

About us

Sustainable Solutions was established in 2001 with the primary aim of supplying and supporting mSupply software in developing countries. We are committed to producing software that enables excellence in health care delivery. We take pride in looking after people who choose to use our services.

We are based in Kathmandu, Nepal

We can be contacted at:

- email: info@msupply.org.nz
- or info@sussol.net
- phone: +977 1 5548021,
- fax: +1 (815)572-9431
- post:
 - PO Box 8975, EPC 355,
 - Kathmandu,
 - Nepal

Please feel free to request more information.

Thanks

Juliet has always been encouraging and more, and has put up with me thinking about mSupply when I shouldn't have been.

This software grew out of necessity at the Medical Supply Department, Kathmandu, Nepal. We learnt a lot from Jaap Zijp's software "Bhandari", and from the staff at MSD where *mSupply* was originally developed and tested.

Ujwal Khattri has stuck with Sustainable Solutions for ten years, including the startup period where our company name could well have been a misnomer.

Jim Staples of 4D inc. <http://www.4D.com> kindly arranged an initial donation of the superb development environment we use.

Thanks to those people in the 4D tech mailing list who have helped for no benefit to themselves.

John Ross, Pharmacist of Patan Hospital, Kathmandu, believed in the quality of mSupply enough to use it long before it was fully ready.

David Adams kindly donated his superb texts on 4D.

The moderators of the E-Drug mailing list have been gracious in letting us use that list for occasional announcements.

Copyright

mSupply software is copyright Sustainable Solutions, 2006, UMN/INF/Interserve 1996 to 1999. You may only use the software in accordance with the accompanying licence agreement.

Licence Agreement and Costs

Commercial users or any user wanting multi-user functionality enabled must obtain a licence from Sustainable Solutions.

Please view our web site <http://www.msupply.org.nz> for up-to-date pricing.

A free version of mSupply is available for Non-commercial use

- You may use mSupply software in single user mode for free as long as it is used:
 - in an approved not-for-profit organisation
 - in a developing country.
- Sustainable Solutions shall be the sole arbiter of those qualifying for free use.
- All users (free and paid) must register with Sustainable Solutions to obtain a registration code. Information supplied will not be used for any purpose other than generation of registration code.
- Users who have obtained a free licence number are not eligible for free support.

Please contact us for quotes regarding customised versions and installation and training packages.

Changes in recent versions

The mSupply version history is available [here](#)

Conventions used in this user guide

If you aren't familiar with using a computer, you should read this chapter, and also work through the tutorial.

Menus: Choose *New item...* from the *Item* menu (sometime also written as *Choose Items > New item...* means ... Click on the word *Item* in the menu bar, then choose *New item...* from the menu that drops down.

Keyboard keys: A handful of keys on the keyboard are used extensively and are indicated in *italics* font. The most common are: *Tab*, *Shift*, *Ctrl*, *Alt*, *Enter* and *Backspace*.

Field: An area where you can make an entry, either text or numbers - usually a white coloured box.

In many places a user can hover over an input field for a description of what is required.

Typed data: Anything that must be typed into a field is shown in monospace font. For example: Type 100 and press *Enter*.

Check box: is a box that changes from having an “X” in it to being blank each time you click in it. To “check” a check box means to click it so that an “X” appears (if there is not one already present). Check boxes have text beside them explaining what the box is for.

Tab & Shift: You can generally move the “focus” (the active area) from field to field in a window by using the *Tab* key. Holding down the *Shift* key while pressing the *Tab* key will move the focus from field to field in the reverse order to normal. Note that on Windows, some buttons are “table”- that is, pressing the *Tab* key moves the “focus” to a button. Pressing the *Return* or *Enter* key then activates that button.

Highlight button: Pressing the *Enter* key will operate the highlighted button in a window, which is usually the OK button.

Double-click: In lists (e.g. of Names or of Items), double click the left mouse button on a line to edit or view more details.

Insertion point: is the blinking line in a field that indicates which field is currently accepting typed input.

OK button: The OK button can be operated by pressing the *Enter* key.

Cancel button: The cancel button can be operated by holding down *Ctrl* key (*cmd* on Macs), and pressing the period key (full stop).

Path to a file (or document): is a way of describing where a document is stored on your hard disk. It is written as “hard disk:folder 1: folder 2:document”, which is the same as “C:\folder 1\folder 2\document”.

Modifier keys: Windows and Macs have different modifier keys. We've tried to list both in the manual, but sometimes one might slip through, so

- The Windows *Ctrl* key does the same as the *cmd* (command) key on Macs
- The Windows *Alt* key does the same as the *opt* (option) key on Macs.

Column headings: Column headings can be clicked to sort the list by that column.

Stock: Also called “inventory”- an entry in mSupply that represents physical stock (inventory) in your store.

Item: An “ item ” in mSupply is a particular product. An item may or may not have stock lines at any given time. For example: In the example data file provided with mSupply, “Amoxicillin 250mg tab/cap” is an item. When you first start to use the example data file it has 2 stock lines. (You can view them under the “stock” tab of the *Item details* window (more on that later!).)

Item lines (or “stock lines”) represent different batches of the same item in your store.

Negative values: In general, there is no need to enter negative values in mSupply. Even when you are entering returned goods from customers, or returned goods to suppliers, you must enter positive

values. mSupply automatically converts the invoice total to a negative amount when it is a credit to a supplier or from a customer.

Supplier invoice: A supplier invoice is the same as a “bill” or a “purchase”

Build: A transaction that records the manufacturing of an item by turning raw materials into a finished product - refer [Building \(Manufacturing\) Items](#).

Setting up mSupply

Hardware requirements:

Windows

Hardware requirements vary widely depending on what you want to use mSupply for

Here's a rough guide.

Absolute minimum	Windows 7,XP, Vista or Windows 2000 computer with a 500 Mhz Pentium processor or equivalent.
Suggested single user or Client machine for use with server.	Win 2000 or later, 800 Mhz or faster Pentium processor or equivalent, 256Mb RAM
Suggested server	Win 2003 or XP or Win 7 or later, 1.8Ghz Core 2 duo or equivalent, minimum of 1Gb RAM. 4Hard disks. 3 configured as RAID5, Attached to Uninterruptible Power Supply (UPS) unit with software to shut down server if battery power is about to run out.

Macintosh

- Mac OS X 10.5 or later.
- 50Mb hard disk space.

Backup system

Once you start using mSupply, it is of crucial importance that you have a method of backing up your data. mSupply stores all its data in a file that rapidly becomes large. You need, therefore, to have a high capacity removable storage device. We strongly recommend the use of an external hard disk using either firewire (IEEE 1394) or USB2 to facilitate off-site storage of backups.

- See the section in Preferences that covers mSupply's built-in backup features that allow backup to another disk, and to an internet backup site... you'll find it here: [Backup](#)
- If not using our internet backup service, you need to be able to store backed up data off-site to prevent the risk of loss by fire, theft, etc.



Sustainable Solutions will not be able to help you recover lost data in the event of hardware failure if no backup is available.

Antivirus

Windows based operating systems are particularly prone to malware if precautions are not taken. We recommend the following precautions:

- Install a reputable anti-virus program, including web protection if the computer has access to the internet. We recommend [F-Prot](#).
- Disable USB ports - refer to [this site](#) for suggested methods.

Ensure that access to passwords to allow exceptions to the above two measures are kept secure.

Hardware recommendations:

- A connected printer is not absolutely necessary in every situation, but for most situations it is a requirement. A dot-matrix printer may be used, but an ink-jet or laser is preferable.
- Buy hardware for which you are able to obtain good support.
- Buy brands with a reputation for quality (even if it means buying a slower/older machine).
- We have clients running mSupply on a wide range of hardware. We are happy to discuss hardware options further via email or phone.

Upgrading from previous versions

If you open a data file that was created with a previous version, it will automatically be updated to the new format. Please note that this process may take some time.

Note that if you are using a version earlier than v1.96 you must upgrade to v1.96 and then to version 2 or 3.



IMPORTANT! Always make a backup of your data file before upgrading, and preferably keep a copy off-site. We will not be able to help you in the event of some unexpected disaster if you haven't followed this advice!

Installation

We are assuming you have obtained mSupply via the Internet or on a CD.

If you have downloaded the file you need, and you have saved it to your desktop, it is important that you saved the file with an “.exe” extension or it will not run (You can rename a file by right-clicking on it). The default name for the file is “mSupply_installer.exe”

If you are using the CD, it should automatically run when inserted. Otherwise, locate the file “mSupply.....exe” on the CD using Windows Explorer.

It is strongly recommended that users who are not familiar with program installation adhere to these

directions.

- Double-click “mSupply_installer.exe”, and it will automatically run the mSupply installer.
- The installer will do the following:
 - Create a folder on your chosen drive called “mSupply”
 - In Windows XP & 2000, create in the mSupply folder a sub folder called “Database” containing an example data file.
 - In Windows Vista and Windows 7, the example data file is installed in the My Documents/mSupply/Example sub folder.
 - NOTE: You can use this data file for practice. (Or use the tutorial at the start of the manual to learn the basics quickly)
 - Install the “mSupply.exe” application and associated files. Double-clicking this file will do the same as double-clicking the “start mSupply” icon on your desktop.
 - Install “readme.txt” - information on licensing and using mSupply.
 - Install “mSupply manual....pdf” - this document (CD version only).
 - Create two shortcuts on your desktop: “ start mSupply” and “ mSupply manual” (CD version only)
 - Create a “mSupply folder” entry in the “programs” section of your “start” menu.

Now you are ready to begin! Proceed to the section below on starting the example database.

Example data file

The mSupply installer treats Example data files in a special way. Re-installing mSupply on a previous installation will replace all the files except the Example data file. This is to prevent valuable data from being deleted as users may have started entering actual stock into the Example data file.

To install a fresh copy of the Example data file on Windows you can carry out one of the options described below:

- Un-install mSupply using the Windows menu *Start > Program Files > mSupply > Uninstall mSupply* . This will remove all installed files of mSupply which includes the Example data files. Re-installing mSupply now will install a fresh copy of the Example data file.
- You can manually delete the Example data file and re-install mSupply. The mSupply installer will install a fresh copy of the example database as the previously installed file has been deleted.

On Macintosh machines, simply replace the *Example* folder from the mSupply installer image.

Notes for Windows users

- In the *regional settings* in Control Panel, we recommend that the short date format is set to display only 2 digits for the year (YY, not YYYY).mSupply lists are set up to allow only enough space for 4 digits with most font sizes, but occasionally 4 digit years may be truncated. Having the wrong setting here will only affect display, not the actual data. It does *not* matter if you use DD/MM/YY or MM/DD/YY or YY/MM/DD
- If the display of lists in mSupply overlaps the separator lines, turn off *large font* in the *display* control panel.

Starting mSupply for the first time

To start mSupply, either

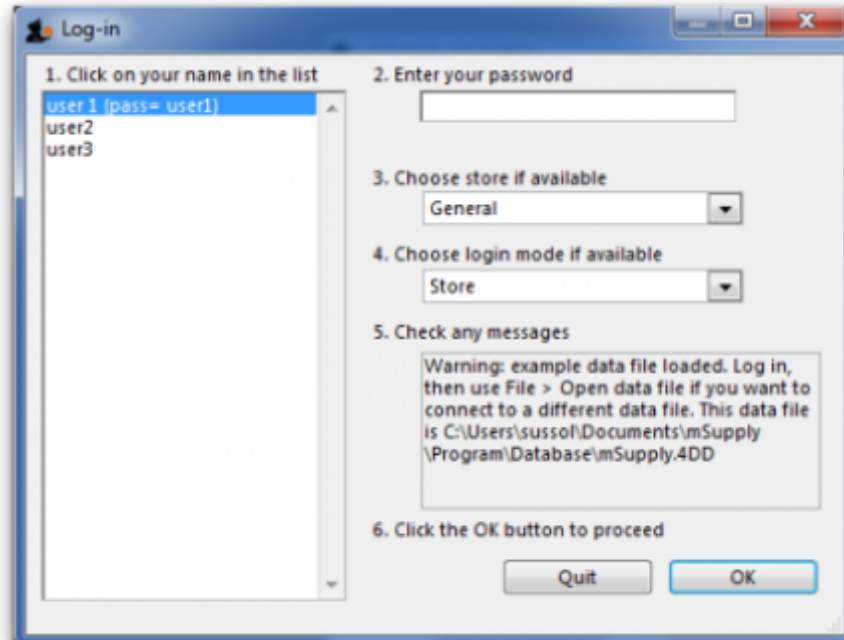
- double-click the *start mSupply icon* on your desktop, or
- choose the *start mSupply* item from the mSupply menu in the programs section of the Start menu (on Windows). If this is the first time mSupply has been started after installation, then an example data file will be opened allowing you to follow the mSupply tutorial. mSupply will present you with a log in window.

Note that mSupply will “remember” the last data file used, and automatically present the log-in window for that file unless you move or rename your data file. If you do this, mSupply will show you a standard open/save window for you to choose the new name/location of your data.

Creating a new data file

If you would like to create a new data file now, then log in to the example data file and from the mSupply menu do the following.

- *File > New Data File...* Navigate to a convenient location. Assign a name to your data file and click the save button. mSupply will now start creating a new data file.
- You will be presented with a login window. See below for instructions



- Start entering your data.

Alternative method for creating a new date file

Here is an another way to create a new data file.

- Quit mSupply if it is running.
- Start mSupply and then immediately hold down the “alt” key (You will now be shown the following which has a number of radio buttons with the different options available).

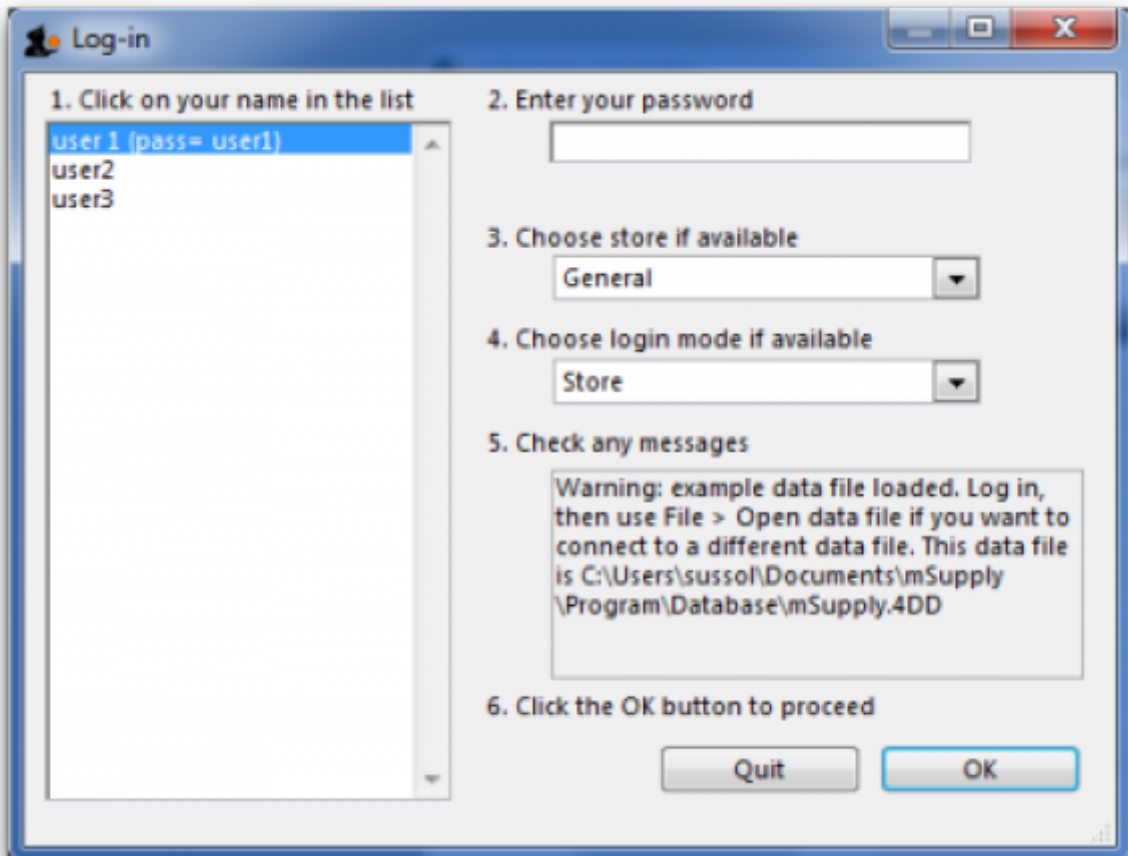


- Choose the 3rd radio button *Create a new data file* . Another window will open where you can choose the location and name of your new data.

Once mSupply has opened up a particular data file, that file becomes the default file which is opened automatically on restarting mSupply. To use a different file, it must be chosen, as described later. If the default data file is renamed or moved to a different location, it must be opened using its new name or location.

Log-in to mSupply

The first time you use mSupply, you will be presented with the log-in window like this:





mSupply® ships with three users. “user 1” and “user 2” are the designer and administrator - these two users cannot be deleted, but they can be edited, allowing the use of appropriate names and making changes to their passwords and permissions.

1. You should select *user 1*(*pass=user1*) from the list
2. Enter the password “user1” (without the quotes). When different users with their own level of access have been set up, you will then log-in by selecting your user name and typing your own password.
3. From the drop down list, select the store with which you are working. Most mSupply users will be operating with a single store, but for users operating with more than one store, the login screen allows you to select any of the stores to which you have access. After selecting the desired store, all transactions will relate to that store until you return to the login screen and select a different store from the drop down menu.
 - Supervisors and other Level 1 users will have an additional menu item, *Supervisor - All stores* . In this mode, all stores are accessible, and you would use this mode, for instance, when placing an order for supplies which will be distributed to a number of stores. Further information is available here: [Show stores](#)
4. Choose login mode, you have the option to select *Store mode* or *Dispensary mode* ; the default can be set in your *Preferences*

Finally, click *OK* to login

Preparing mSupply for actual use

The following 2 steps are necessary to start mSupply for the first time.

- Create a new data file
- Prepare the new data file for use

Create a new data file

In order to create a new data file, see above [Creating a new data file](#)

Save the data file in a location that you can easily find for doing backups. We suggest you create a folder called “mSupply data” inside the *My Documents* on Windows PC or the *documents* folder on a MAC to store your data file.

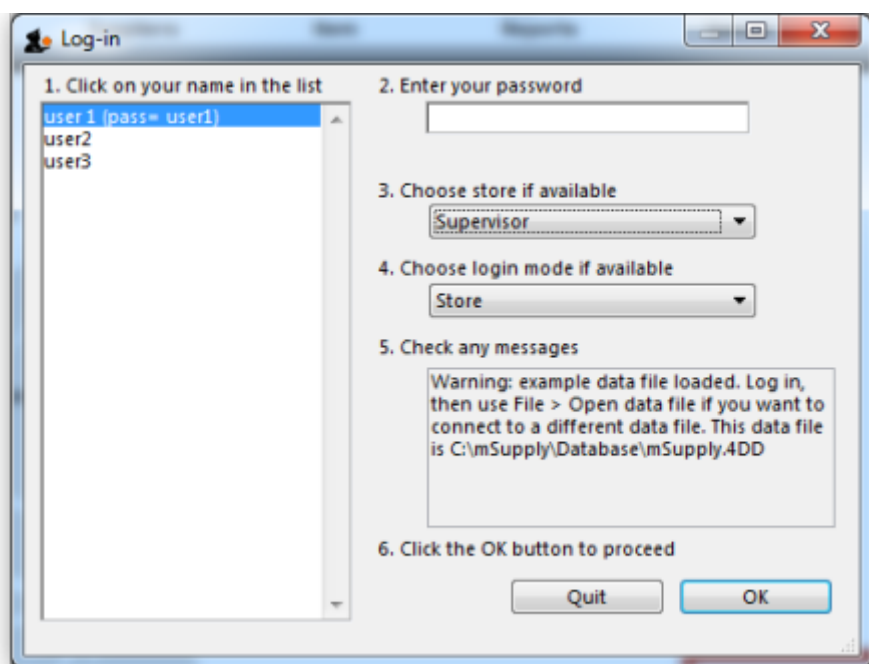
Prepare the new data file for use

1. Choose your home currency. Currencies are used when you are calculating cost prices for orders, and when you are comparing quotations from suppliers. Choose *Special > Currencies*. If your currency is not already shown, click the *New* button at the top of the window and choose from the pick-list the three letter code abbreviation of the currency you will use to operate your database (e.g. “INR” for Indian Rupees, or “SAR” for South African Rands, or “USD” for US dollars). Set the “Rate” to “1”.

2. Enter your Preferences. Choose *File>Preferences* to do this. Read the chapter of the manual on Preferences to learn what the different Preference settings do. You will find the Preferences section [here](#)
3. Enter your Suppliers and Customers.
4. If you have a computer file holding your customer and/or supplier details, it can be imported directly into mSupply. See [Importing Customers, Suppliers, Patients](#).
5. You can also do this as you go along simply by entering a customer or supplier the first time you create an invoice or order from them.
6. Enter the items you keep in stock. There are a number of ways you can do this:
 - If you have a computer file holding details of the items you stock, it can be imported directly into mSupply. For more information see [Import items](#)
 - A file containing the WHO essential drug list is available from the download page of the mSupply web site. You are encouraged to use this file should you have no computer file of your own.
 - You can enter each item using the *New item* Command from the item menu.
 - Enter your stock figures.
 - If you have a computer file holding both details of the items you stock and your current stock figures, it can be imported directly into mSupply. See: [Import items and stock](#)
 - Your opening stock may be entered manually; choose *Item>Inventory adjust - add stock* , and enter the required details.
 - If you intend to record the location of each item, you should define the locations that your store contains. See [Locations - Defining locations](#).

About Stores

At the log in window you have the option to log into a specific store or to log in as 'Supervisor' by choosing option 3 shown in the below window.



Unless you intend to use multiple virtual stores in mSupply you can ignore this option. More information will be found here: [Virtual stores](#)

About Dispensary Mode

mSupply allows you to log in in two different modes, *Store mode* or *Dispensary mode* . Each user can have his/her permissions set to allow or disallow each mode.

Each mode presents the user with a different menu bar and different windows, depending on whether you are issuing stock to an organisation or an individual

See [Dispensary Mode](#).

Previous: [Mobile \(Android\) User Guide](#) Next: [Logging in](#)

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