

26.10. Currencies

Choosing *Currencies* from the *Special* menu opens a window with a list of currently entered currencies. The home (default) currency always has a rate of 1, and the entry in the rate column of additional currencies is the number of units of the default currency equivalent to 1 unit of the other currency. In the screenshot below, the home currency is the Australian dollar (AUD) and the Rate of the Euro is 1.3317, so, at the time of writing, 1.3317 Australian dollars (the default currency) was equivalent to 1 Euro, 0.7485 Australian dollars was equivalent to 1 New Zealand dollar, etc.



Buttons in the Currency list window

New: To add a new currency (you can select from the ISO4217 list of currencies).

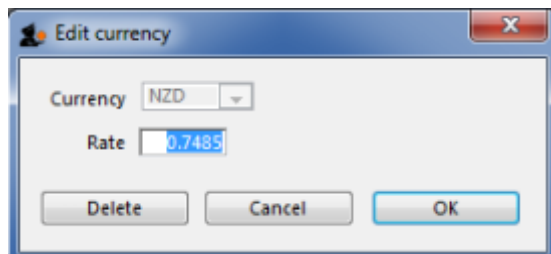
Get internet rates: Providing you have an internet connection, clicking this button will update the rate of exchange from the Yahoo website.

Update mSupply rate: The refreshed rates will only become active when you click this button.

OK: Click OK to close the *Currencies* window when you have finished editing currencies.

Editing a currency entry

Double click a currency to edit it manually. Note that your “home” currency should be entered with a value of “1”, and all other currencies should be entered with a rate relative to your home currency. A window with the currency code and the current rate will appear.



You can edit the rate. Note that doing so will automatically update quotes that use that currency.

To change your default currency

1. Double-click on your default currency in the list
2. Click the padlock icon
3. Choose a different home currency.

Note that all other currencies will have to have their rate entered relative to the new default currency

Buttons in the Edit currency window

Delete: Click to delete the currency. If the field is dimmed, the currency is in use by quotations, and cannot be deleted.

Cancel: Click to exit the window without saving changes.

OK: Click this button when you are finished editing currencies.

Using Foreign currencies in transactions

We discuss this very important topic [right here](#)

Previous: [26.09. Custom data](#) | | Next: [26.11. Using foreign currencies in transactions](#)

26.11. Using foreign currencies in transactions

The foreign currency feature enables you to receive stock from suppliers in the suppliers own foreign currency and also distribute goods to customers in their own currency.

Set up foreign currencies for customers and/or suppliers



You must have *Foreign Currencies* configured in mSupply if you are using this feature. You set them up using [Currencies](#).



Once this is done, follow the steps below.

Set the Store to use foreign currency

- From the Navigator click drop down menu **Special > Show Stores...** double click to select the store in which you want foreign currencies to be used and in the window that appears hit tab **Preferences**.
- Check **Store mode: Able to issue in foreign currency**. - Click **OK** and return to the mSupply Navigator.

Set the currency of the Customer or Supplier

- From the **Navigator** choose **Customers > Show Customers**. - Locate the Customer and double-click it. In the window that appears click the **General** tab and in **Currency** drop-down list (top-right) select the appropriate currency for that Customer. - Click **OK** to return to the Navigator and do the same for the Supplier if required.

Using foreign currencies

- Generating an invoice for goods (either from a Supplier or to a Customer):
 - [receive goods from a Supplier in a foreign currency](#)
 - [issue goods to a Customer in a foreign currency](#)
- Generating a credit for returned or unwanted goods (either from a Customer or to a Supplier):
 - [receive returned goods from a Customer in a foreign currency](#)
 - [send/return goods to a Supplier in a foreign currency](#)

Purchase orders



Instructions in these section to be update

Supplier invoices



In this example, our store operates with Australian dollars (AUD) as the local currency, and is making a purchase from a European supplier which uses the Euro (EUR)

1. From the Navigator choose **Suppliers > New Supplier Invoice**
2. In the Supplier Invoice window that appears select your supplier and view its details by double-clicking.

3. Click the **Price** tab and change the currency (as highlighted in box **1** below) to the currency in which the supplier provides the items to you.
4. Return to the **General** tab and click button **New line** to add a new item line.
5. In the window that appears type the details of the item you are receiving and hit button **OK & Next** to add further items.
6. Once all items are added, again click the **Price** tab and review the item prices as highlighted in box **2** below:

Supplier invoice

Name: International Dispensary Association
 Their ref: example ida
 Comment:
 Entry date: 29/08/2013
 Confirm date: 29/08/13
 Colour: Black
 Invoice number: 1,010
 Status: cn
 Goods receive ID: 0
 Purchase Order ID: 0
 Entered by: Sussol
 Store: General

Category: None

General Summary by Item Summary by Batch Price Log

Tender reference: **1**
 Currency: EUR
 Currency rate: 1.4817

Supplier subtotal: 210
 Extra foreign currency charges: 0
 Total foreign currency charges: 210
 Local charges: 0
 Discount:

Line	Item Name	Qty	Pack	Batch	Expiry	Price FC	Extension FC	Price	Local c...	Price exten
1	Benzhexol 2mg tab	1000	1	RS-851	31/10/16	0.01	10.00	0.01	0.00	14.81
2	Lubricating jelly (KY) (g)	100	25	JK-577	31/01/17	2.00	200.00	2.96	0.00	296.34

Other charges:
 Item(s):
 Amount: 0.00

Subtotal: 311.15
 0 % tax: 0.00
 Total: 311.15

Hold ☐ Finalize ☐ Export batch: 0 Margin: -1.66

OK & Next Delete OK



The columns headed **Price FC** and **Extension FC** in box **2** above show the cost price of goods to you in Euros - i.e. the Foreign currency which the supplier uses, while the figures in the columns on the right show the prices in Australian dollars - i.e. your local currency.

7. Click **OK** to save the Supplier invoice and introduce the items to stock.



- If you change the supplier on an invoice that has item lines, the following message will appear. Check the currency is correct for the new customer and adjust it if necessary.



Customer invoices



In our example, the supplier uses Australian dollars (AUD), and is creating an invoice for Highland Health Centre which uses Solomon Islands dollars (SBD).

1. Ensure *Foreign Currencies* are active as per the instructions at the top of this page.
2. From the Navigator choose **Customers > New Customer Invoice**.
3. In the Customer Invoice window that appears select your Customer in field **Name** and note the currently set currency and its rate as highlighted in box 1 below.
4. Now click the **New Line** button to add a new item line.
5. In the window that appears type the details of the item you are issuing and hit the **OK** button. Repeat as needed.

Customer invoice

Name: Highland Health Centre Confirm date: 00/00/00 Colour: Black

Their ref: HC4 Invoice: 30,040

Comment: Category: None Entry date: 19/09/13

Goods receive ID: 0

Status: nw

Entered by: Sussol

Store: General

New line Delete line(s) History Confirm

General Summary by Item Summary by Batch Transport details Log

N...	Li...	Location	Item Name	Quan	Pack Size	Batch	Exp date	Price fc	Price fc ext...	Sell Price	Price exten
1	TAB		Metoclopramide 10mg tab	1000	1	YT407	31/10/16	0.06	63.69	0.01	10.00

Other charges Item: Amount: 0.00

Subtotal: 10.00

0 % tax: 0.00

Total: 10.00

Currency: SBD Currency rate: 0.157 Foreign currency total: 63.69

Hold Finalize Export batch: 0

OK & Next Delete OK



- Box 1 shows the customer's currency, SBD, the Currency Rate, which shows the value of 1 Solomon Island dollar in the supplier's currency, Australian dollars, and the invoice value in the customer's currency.
- Observe the item's foreign currency values (SBD) in the columns **Price fc** and **Price fc ext** on the Customer Invoice in box 2 below:

6. Click **OK** to save the Customer invoice.

- If you change the customer on an invoice that has item lines, the following message will appear. Check the currency is correct for the new customer and adjust it if necessary.



Alert

This invoice contains lines. Please select the currency manually.

OK

Supplier credit



In our example, the supplier, International Dispensary, uses Euros (EUR), while we use Australian dollars (AUD).

1. Ensure Foreign currencies are active as per the instructions at the top of this page.
2. From the Navigator click drop down menu **Supplier> New Supplier Credit**.
3. In the Supplier Credit window that appears select your Supplier in field **Name** and note the currently set currency and its rate as highlighted in box 1 below.
4. Now click button **New Line** to add a new item line.
5. In the window that appears type the details of the item you are receiving and hit **OK**. Repeat as needed.
6. As this is a credit note, the value is shown as a negative amount
7. Box 1 shows the supplier's currency, EUR, the Currency Rate, which shows the value of 1 Euro in our currency, Australian dollars, and the credit note value in the supplier's currency.
8. Note the item's foreign currency values (SBD) in the columns *Price fc* and *Price fc ext* on the Supplier Credit in box 2 below:

Supplier credit

Name: International Dispensary Association
 Their ref: ida
 Comment:
 Entry date: 19/09/2013
 Confirm date: 00/00/00
 Colour: Black
 Invoice number: 1,011
 Status: nw
 Goods receive ID: 0
 Purchase Order ID: 0
 Entered by: Sussol
 Store: General

Category: None

New line Delete line

L...	Lo...	Item Name	Qty	Pack	Batch	Expiry	Cost price fc	Price fc ext...	Cost Price	Price extension
1	TAB	Prochlorperazine 5mg tab	5000	1	G7153	26/03/10	0.01	-84.50	0.02	-125.00

Other charges

Item(s):
 Amount: 0.00

Subtotal: -125.00
 0 % tax: 0.00
 Total: -125.00

Currency: EUR Currency rate: 1.4817 Foreign currency: -84.50

Hold Finalize Export batch: 0 Margin: -200.00

OK & Next Delete OK

9. Click **OK** to save the Supplier credit.



- If you change the supplier on an invoice that has item lines, the following message will appear. Check the currency is correct for the new customer and adjust it if necessary.



Customer credit



In our example, the supplier uses Australian dollars (AUD), and is creating a credit note for Highland Health Centre which uses Solomon Islands dollars (SBD).

1. Ensure Foreign currencies are active as per the instructions at the top of this page.
2. From the Navigator click drop down menu **Customer> New credit...**
3. In the Customer Credit window that appears select your Customer in field **Name** and note the currently set currency and its rate as highlighted in box 1 below.
4. Now click button **New Line** to add a new item line.
5. In the window that appears type the details of the item you are crediting and hit button **OK**.
6. Boxes **1** and **2** show details exactly the same as explained in the previous two examples

Customer Credit

Name: Confirm date: Colour:

Their ref: Invoice: 30,042

Comment: Category: Entry date: 19/09/13

Goods receive ID: 0

Status: cn

Entered by: Sussol

Store: General

New line Delete line(s) History

General Summary by Item Summary by Batch Transport details Log

N...	Li...	Location	Item Name	Quan	Pack Size	Batch	Exp date	Price fc	Price fc e...	Sell Price	Price exten
1	TAB		Metoclopramide 10mg tab	1000	1	YT407	31/10/16	0.63	-637.00	0.10	-100.01

Other charges Item: Amount:

Currency: Currency rate: Foreign currency total:

Subtotal: -100.01

0 % tax: 0.00

Total: -100.01

☐ Hold ☐ Finalize Export batch: 0

OK & Next Delete OK

7. Click **OK** to save the Customer credit.

- If you change the customer on an invoice that has item lines, the following message will appear. Check the currency is correct for the new customer and adjust it if necessary.



Previous: [26.10. Currencies](#) | Next: [26.12. Product \(drug\) registration](#)

26.14. Authorisation

Sometimes it is important that certain critical processes are not carried out until they have been **authorised**. mSupply allows authorisation to be set according to local needs for:

- [Purchase orders](#)
- [Goods receipt notes](#)
- [Supplier invoices](#)
- [Customer invoices](#)

Response Requisitions can be authorised using the remote authorisation app. See the [26.15. Remote authorisation](#) page for details about that.

Configuring mSupply for authorisation

Turning on authorisation

Authorisation must be set up for **each store independently**. For each store, you can decide which transaction types require authorisation.

To do this, choose *Special > Show stores* from the menus, double-click on the store you are logged into and click on the *Preferences* tab. Now turn on the authorisation preferences for the transactions you want to be authorised. See the [26.08. Virtual stores](#) page for details on which preferences do what. Click the **Special** tab, then click **Stores**.

Setting up authorisers

Certain users must be designated as authorisers for each store by giving them permissions to authorise different transaction types.

To do this, *File > Edit users* from the menus and double-click on the user (or change the **Show** drop down list to *Group* and double-click on the group of users) you want to designate as an authoriser and give them the *Authorise purchase orders*, *Authorise goods received*, *Authorise customer invoices* or *Authorise supplier invoices* permissions in the appropriate stores.

See the [25.15. Managing users](#) page for details on where to find these permissions.

Supplier invoice authorisation

When the *Supplier invoices must be authorised* store preference is set, new supplier invoices will show an **Authorised** checkbox:

Supplier Invoice

Name: Abbot Laboratories (singapore PTE.LTD) Entry date: 22/05/2013 Colour: Black

Their ref: SNG102 Confirm date: 22/05/2013 Invoice number: 2,010

Comment: Status: cn

Category: None Goods receive ID: 0

Default Donor: Purchase Order ID: 0

Entered by: Sussol Store: General

New line Delete line

General Summary by Item Summary by Batch Price Log

Lo	Item Name	Qty	Pack	Batch	Expiry	Cost Price	Sell Price	Price extension
1	Abacavir 300 mg	10	1	1.1.1	01/01/2016	20.00000	20.40000	200.00000

Other charges

Item(s):

Amount: 0.00000

Subtotal: 200.00000

0 % tax: 0.00000

Total: 200.00000

Hold

Finalize

Export batch: 0

Margin: 2.00

☒ Authorised

OK & Next Delete OK

An authoriser must check the **Authorised** checkbox before the supplier invoice can be confirmed (it will be disabled for users who do not have the *Authorise supplier invoices* permission).

If the **OK** button is clicked while the **Authorised** box is unchecked, a warning message will appear telling you that unauthorised invoices cannot be confirmed and nothing will happen.

If you have permission to authorise a supplier invoice, you can also unauthorise it:

- If the invoice has a new (*nw*) status then it has not been entered into stock. If you unauthorise it, users can edit it and you will still control the process of authorisation before the goods are entered into stock.
- If the invoice is confirmed (*cn*), the goods have already been entered into stock. If you unauthorise it, users will be able to edit it again and any changes users make will affect stock levels immediately. It is good practice, therefore, to only unauthorise a confirmed invoice to make changes immediately and the reauthorise it straightaway.

When supplier invoices have to be authorised, they **cannot be confirmed until they are authorised**. Until then:



- Unauthorised invoices are held at suggested (*sg*) status.
- The official invoice cannot be printed.
- Goods are not received into stock.

Customer invoice authorisation

When the *Customer invoices must be authorised* store preference is set, new customer invoices will show an **Authorised** checkbox:

The screenshot shows a 'Customer invoice' window. At the top, there are input fields for 'Name' (Acumao/Remexio CHC), 'Confirm date' (23/05/2013), 'Colour' (Black), 'Their ref' (AIL-403-2), 'Comment', 'Category' (None), 'Invoice' (9,252), 'Entry date' (23/05/2013), 'Goods receive ID' (0), 'Status' (cn), 'Entered by' (Sussol), and 'Store' (General). Below these are buttons for 'New line', 'Delete line(s)', 'Backorders', and 'History'. A tabbed interface shows 'General' selected. A table with 8 columns (Location, Item Name, Quan, Pack Size, Batch, Exp date, Sell Price, Price exten) contains one row: Location 1, Item Name 'Acces Pin With Stopper for use IV.Inj. site', Quan 2, Pack Size 1, Sell Price 0.61148, Price exten 1.22296. At the bottom, there are checkboxes for 'Hold', 'Finalize', and 'Authorised' (highlighted with a red box). There are also buttons for 'OK & Next', 'Delete', and 'OK'. A summary section shows 'Amount: 0.00000', 'Subtotal: 1.22296', '0 % tax: 0.00000', and 'Total: 1.22000'.

An authoriser must check the **Authorised** checkbox before the customer invoice can be confirmed. The **Authorised** checkbox will be disabled for users without permission to authorise.

If the **OK** button is clicked while the **Authorised** checkbox is unchecked, a warning message will appear stating that unauthorised invoices cannot be confirmed and nothing will happen.

When customer invoices have to be authorised, they **cannot be confirmed until they are authorised**. Until then:



- Unauthorised invoices are held at suggested (sg) status.
- The official invoice cannot be printed.
- Goods are not removed from stock.

Goods receipt authorisation

When the *Goods received lines must be authorised* store preference is set, a new Authorised column will be displayed and will contain a checkbox for each goods receipt line. It looks like this:

Supplier: Gold medical supplies

Received date: 05/11/19 Tender reference

Supplier reference

Comment

Store: General Warehouse

Goods received ID: 12

Created by: Admin

Modified by:

Entry date: 05/11/19

Purchase order: 12

Supplier Invoice: 0

Status: nw

Add from purchase order Add an un-ordered item Delete line Check space Print goods receipt

Line	Location	Item code	Item name	Batch	Exp date	Pack Size	Quan	Authorised
1		aci250t	Aciclovir sodium 250mg inj	HYE778	31/5/25	10	20	<input type="checkbox"/>

Authorisation comment:

☐ Finalise

OK & Next Delete OK

Users who have the *Authorise goods received* permission turned on can check the *Authorised* checkbox for each line that is authorised. When the goods received note is finalised, only lines that are authorised will be added to the supplier invoice to be received into stock. The unauthorised lines will remain on the finalised goods received note as a permanent record of what was actually received but not authorised.



Any unauthorised goods received note lines do not count towards stock received against purchase orders or on goods received notes so they can be received again at a later date if they are resent by your supplier.

Users who have the *Authorise goods received* permission turned on may also leave a comment in the **Authorisation comment** field to record anything that needs to be noted.



Invoices can be edited after authorisation but **goods receipt lines cannot be unauthorised** to fix mistakes! Any authorising errors can only be fixed using stock adjustments.

Purchase order authorisation

When the *Purchase orders must be authorised* store preference is set, new purchase orders will show an **Authorised** checkbox:




- An unauthorised purchase order can still be confirmed and have goods receipted against it so it is not as restrictive as authorisation on customer or supplier invoices.
- However, an unauthorised purchase order will print with an *Unauthorised* watermark across it. An authorised purchase order will print without the watermark.

Monitoring authorisations

Printing unauthorised invoices

When an invoice is **not** authorised, it will print with a clear **Unauthorised** watermark. Authorised invoices will print without the watermark.



Sames

Invoice: 9181
Page 2 of 2

Supplied to :
 Nitibe/Ustaco
 Nitibe, OECUSI

Status: cn
 Comment : Maria Ribeiro
 Confirmed: 11/12/2012
 Printed: 23/05/2013

Invoice Category :
 Comments : Maria Ribeiro

Authorized by :
 Collected by :

Line	Item	Quan	Pack	Batch	Expiry	Price	Extension	Box
24	Syringe Disposable 2.5 ml w/needle 0.6x 25 mm 2,5ml	100	1	none	00/00/00	0.00	0.00	
25	Syringe Disposable 5 ml, w/needle 0.7x30 mm 5ml	100	1	4204003	31/12/16	0.00	0.61	
26	Disposable Needle 19 G x 1.1/2 (box/100) 1.1 x 40 mm	100	1		00/00/00	0.01	1.22	
27	Disposable Needle 21 G x 1.1/2 (box/100) 0.7 x 25 mm	100	1		00/00/00	0.01	1.00	
28	Disposable Needle 23 G x 1.1/4 0.65 x 32mm	100	1		00/00/00	0.01	1.00	
Total:						647.68000		

Prepared By :
 Checked By :
 Authorised By :

Signature :
 Signature :
 Signature :

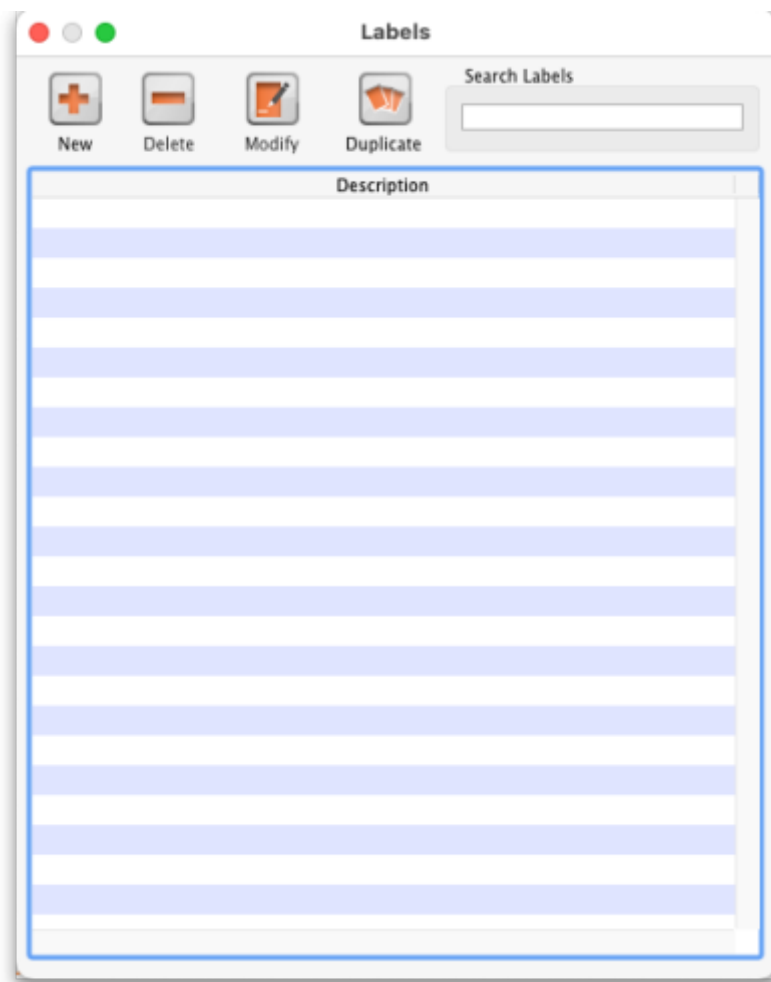
Delivered By :
 Received By :

Signature:
 Signature:

Viewing authorisation logs

mSupply records the authorisation and unauthorisation of invoices and creates a record every time the authorisation status of an invoice changes.

To view the records, click the **Log** tab of an invoice.



Double-click a label in the list to edit/print that label. If there is a long list and it is hard to find the one you want, you can type something in the **Search labels** field and the list will be restricted to labels that have a description that *contains* what you have typed.

Click the **New** button to add a new label.

The window for editing or adding a label look the same, the only difference is that the existing label will be populated with the current settings saved for that label.



The labels are designed to print to plain 90mm x 40mm (w x h) labels from a Zebra label printer. Please contact us if you require support of other printers and other label formats.

Normal tab

This is for normal layout of printing. This will occur once per label. You can use the **quantity to print** field to specify how many time to print this same label.

Label name

This field will not print on the label, this name is shown in the list of available labels when the *Special > Misc labels* menu item is chosen.

Label details

These fields will print on the label in roughly the position that they are on the screen.

Note that if you enter a very long left and right footer they may overlap in the middle of the label. Print a single test label to check first.

Line spacing

The spacing you want between each line of text.

Size

The font size you wish to use for each part of the label.

Quantity to print

Specify how many copies of this label you wish to print.

Note that the quantity to print is not saved - it is reset to 1 each time you open the label.

Print button

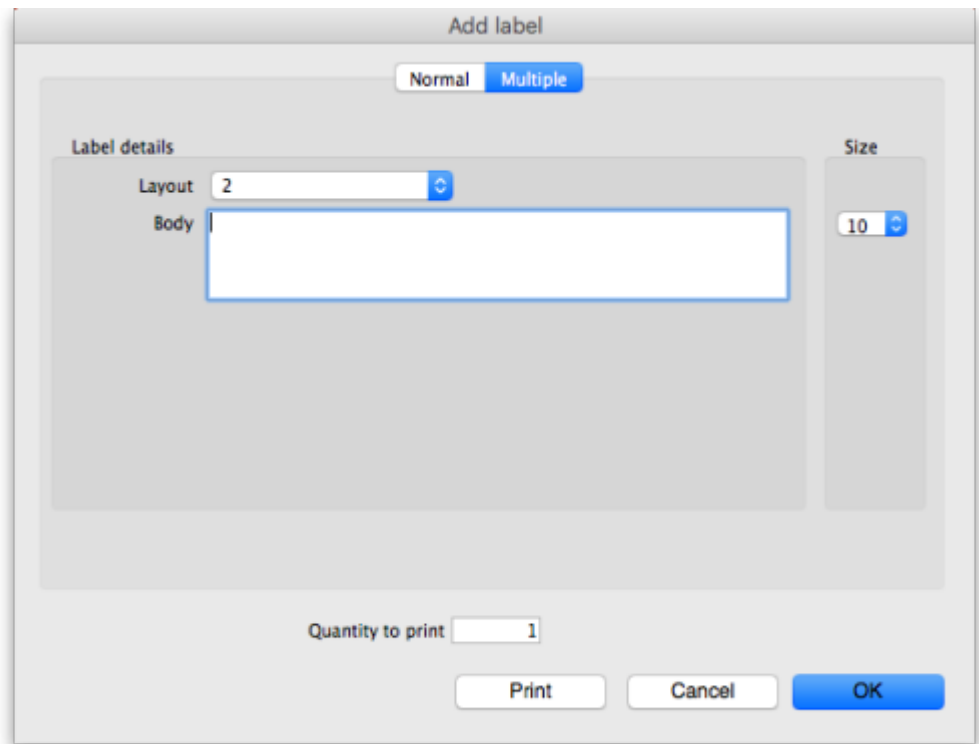
Clicking this button will print to your default mSupply label printer. It will print then number of labels specified in the *Quantity to print* field.

Cancel button

Clicking Cancel will close the window without saving any changes you have made.

OK Button

Clicking OK will save any changes you have made and close the window.

**Multiple tab**

This allows you to print the same thing multiple times on the same label.

Layout:

Select "2" for the same thing printed twice on the label, side by side.

Select "4" for the same thing to be printed 4 times on the label in a 2x2 grid layout.

Body

The text you want printed on the label. This label will have no headers and footers.

Previous: [26.15. Remote authorisation](#) | | Next: [26.17. Keyboard shortcuts](#)

26.17. Keyboard shortcuts

These are the keyboard shortcuts you can use in mSupply. They can really speed up your work because using them is much quicker than using a mouse once you get used to them. Try it and see!



The Windows operating system uses the Control key and the Mac operating system uses the Command key to activate keyboard shortcuts. For clarity's sake we've used the control key in the table below. If you're using a Mac just substitute Command for Control.

Shortcut	What it does
General useful computer shortcuts / Navigation keys - work in most applications	
Ctrl + A	Select All text in a field / cell
Control + X	Cut
Control + C	Copy
Control + V	Paste
Control + Z	Undo
Control + Shift + Z	Redo
Control + Q	Quit the application
Tab	moves focus to next field / cell. Also used after typing in a selection textbox (e.g. item name) to bring up a window showing selections which match what was typed. But this isn't technically a shortcut, just the way the fields work!
Shift Tab	moves focus to previous field / cell
Spacebar	toggles between two options (with a checkbox or radio button), e.g. Male / Female in Patient details entry window
Almost Everywhere in mSupply	
Enter	Activates the default button (which is highlighted) on the active window. Default button is usually OK.
Control + . (full stop)	Cancel/Delete
Control + Shift + N	OK & Next
Control + Shift + P	OK & Previous
Navigator	
Control + F	Show customer invoices
Control + I	Show items
Control + N	New customer invoice
Control + R	Show prescriptions
Control + D	New prescription
Control + J	Show supplier invoices
Control + H	New supplier invoice
Control + 1	Show log in window
Control + 2	Show switch stores window (same as log-in but no need to enter user/pass)
Control + 0 (zero)	Show purchase orders

Shortcut	What it does
General useful computer shortcuts / Navigation keys - work in most applications	
Control + Y	Show customers
Control + U	Show suppliers
Invoice entry	
Control + N	Add a new line to the invoice
Control + Shift + N	OK & Next to save, print (if printing checked) and open a new prescription entry window
Invoice line entry	
Control + K	Same as clicking OK (Enter key is the default OK & Next button)
Stocktake list	
Control + N	Add a new stocktake
Control + Shift + N	Add a new blank stocktake
Stocktake entry	
Control + N	Add a new line to the stocktake

Previous: [26.16. Misc labels](#) | | Next: [26.18. Troubleshooting](#)

26.01. Miscellaneous topics

This page is a collection of miscellaneous topics that may be useful but don't easily sit anywhere else in our online documentation. They are included here so that they can be found when you search this wiki for the relevant key words.

Inactive logout

You can set mSupply to log an inactive client out after a customisable length of time. See the [15.01. General preferences](#) page for details.

End of month tasks

We are presuming that you will finalise and export your invoice data once a month. If you choose a different frequency, you should still follow the same procedure.

Tasks to perform:

- Check your invoices are correct. Once you have finalised an invoice, it can not be edited.
- Finalize and export supplier invoices. See the file menu chapter.
- Finalize and export customer invoices. See the file menu chapter.
- Record the stock on hand value (this is only necessary if your accounting system requires the information). See the special menu chapter.

Hints:

- Each month, take your finalised invoices and file them. We suggest you file invoices in order of their invoice number (a separate file for supplier and customer invoices).
- Keep a file with the summary printout from each month produced when you finalize invoices.

End of year tasks

It is usual to run according to a financial year. mSupply does not require you to delete records or perform special operations for the end of the financial year. If you want to, you can just carry on using mSupply as usual.

However, there are certain procedures that will improve operation, and make an audit of your operation easier.

1. Perform a stocktake.
 1. Finalize all outstanding invoices. Use the **Finalize Customer invoices ...** and **Finalize Supplier invoices...** commands to do this. (Note that any customer invoices with a status of "sg" ("suggested") must be confirmed before they can be finalised or exported.)
 2. Create stocktake sheets to record differences easily between actual stock and stock according to mSupply. See the stocktake sheets section of the "Report menu" chapter.
 3. Use inventory adjustment transactions to correct errors. See the Inventory adjustment- add stock and the Inventory adjustment- reduce stock sections of the "Item menu" chapter.
 4. Finalize inventory adjustments. Use the Finalize inventory adjustments command to do this.
2. Make a backup copy of mSupply as it stands at year-end. It is a good idea to keep this backup in a secure place for long term storage.
3. Print a ledger for each item. Choose "print item ledger" from the "report" menu. You can use your backup copy of mSupply to print this ledger at a later date.
4. Choose "set start of year stock" from the "special" menu. This simply records the date and next transaction number, and records the total opening stock quantity for each item to allow a ledger calculation for the coming year.
5. You are now ready to begin entering transactions for the next year.

Maintenance and repair

If you are using your data file regularly, it is a good idea occasionally to check that no problems have developed. Problems can develop due, for example, to faulty hardware and other reasons outside our control.

For technically competent users or professional IT staff

In the case of a serious hardware failure, the first option should always be to revert to the last known good backup of your data.

If for some reason you must repair a damaged data file, please contact Sustainable Solutions for

advice.

To check your data, download a product called *4D Tools* . (4D Tools and a manual is included on the CD) from <ftp://ftp.4d.com>.

4D Tools can simply check your data file for errors, or repair your file. Please contact Sustainable Solutions if you believe your data file has a problem, before repairing it.

Always use *4D Tools* on a backup copy of your data first.

If *4D Tools* is unable to repair your data, Sustainable Solutions is able to use specialist tools to examine your data, and even export your data and re-import into a new data file. We have not had to do this for a customer yet, but the option is available as a near-last resort.

How do I move a window whose title bar has been hidden?

On Windows:

- Method 1: Press Ctrl and both mouse buttons, and drag the window to the new location.
- Method 2: Press Alt-Ctrl-right mouse button, while dragging the window to the new location.

On Mac OS

- Press Control-Command-mouse button, and drag the window to the new location

Security of your data

If you maintain the mSupply password system carefully, your data is quite secure.

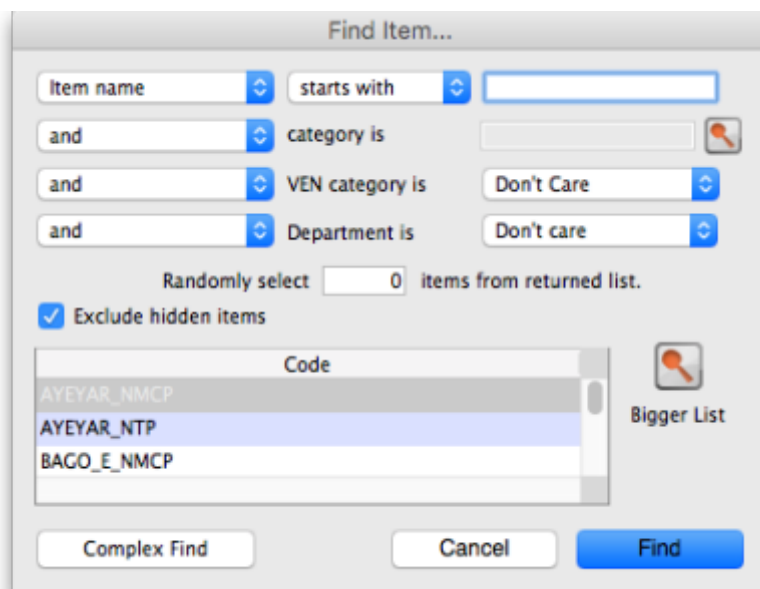
Note, however, that if a person has access to the original copy of mSupply, they will easily be able to open the data file, as the “user 1” password is clearly shown in the password entry screen until it is overwritten the first time you click “OK”. It is your responsibility to keep copies of your mSupply software and data in a safe place.

As of version 1.4, passwords stored in the data file are encrypted with strong (512 bit) RSA encryption, so there is little danger of someone finding your password.

Supervisor mode - all stores

mSupply was initially designed to maintain data relating to a single store in each data file, and for many users, this is how mSupply continues to be used.

Since version 2 users have been able to operate with multiple stores. Normally you will log into a particular store when starting mSupply, and only see stock and transactions relating to that store. However, users can be given the permission to [login](#) as *Supervisor - All stores*. In this mode, users may now access data relating to more than one store - either selectively or cumulatively.



The item search filters will be applied to items visible in the stores selected only. If there are a lot of stores in the datafile you can click on the **Bigger List** button (or **Magnifier** button on some windows) to select the required store(s) in a separate window.

Filtering of stores by Tags and / or Custom data

Some mSupply datafiles can contain hundreds of stores. It can become problematic to them select the exact stores to include in a particular report. To help with this, on some reports, there is an additional magnifying glass button near the top of the store list. See this example on the *Current stock* report window:

[illegible]

When you click on the button, this window opens and it allows you to select the stores to include based on store tag and custom data values:

[illegible]

- **Match tags:** enter the tags that a store must have to be included in the selection. You can

enter multiple tags separated by commas; if there are multiple tags then a store which has any one of them will be included in the search (the store does not have to have all of them to be included). Tags are ignored if this field is left empty. See the [25.08 Virtual stores](#) page for details on setting store tags.

- **Custom data:** enter the name of the custom data values that a store must have to be included in the search in the format *field name:value* where *field name* is the custom field name and *value* is the value the field must have for the store to be included. You can enter multiple *field name:value* pairs separated by commas; any store that has any of the custom fields with that value will be included in the search (a store does not have to have all of the *field name:value* pairs to be included. If the Custom data field is left blank then custom data values are ignored. See the [25.08 Virtual stores](#) page for details on setting store cusatom data fields.
- **and/or drop down list:** determines whether the Tags filter results and the Custom data field searches are ANDed or ORed together i.e. whether a store must have a matching tag **AND** a matching custom data field to be included or whether it can have either a matching tag **OR** a matching custom data field to be included.
- **Find button:** when you click this, only the stores which match the tag and custom data filters will be shown in the store list.
- **Show all:** removes all filtering and show all stores in the store list.
- **X/Y Stores shown text:** X is the number of stores shown in the list, Y is the total number of stores in the datafile.

When the stores list shows the list of stores you want to include in the report, click on the **Select** button. This will close this filter window and highlight all the stores shown in this list in the stores list on the report filter window.

Click on the **Cancel** button if you want to return to the report filter page without selecting any stores.

Ordering stock

In *Supervisor - All stores* mode you can also create Purchase Orders that will be based on data for all stores, and can specify delivery destinations for different lines within the order. See the [6.05. Multi-store Purchase Orders](#) page for details.

Changing item codes in bulk

If you have need to change item codes in bulk, refer to [Import new item codes](#)

Changing name codes in bulk

If you have need to change name codes in bulk, refer to [Import new name codes](#)

Updating On Price List in bulk

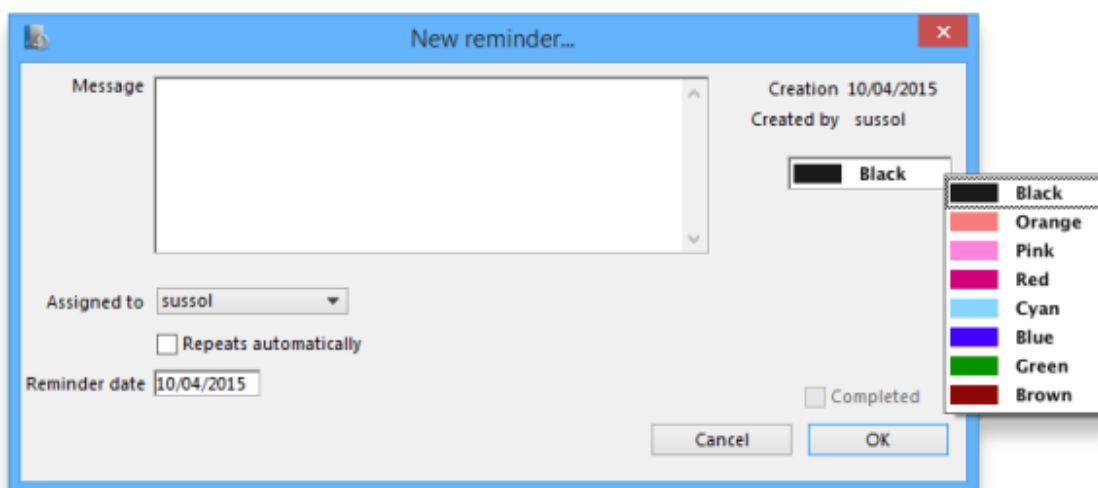
If you have need to change the On Price List for items in bulk, refer to [Update On Price List in bulk](#)

Filtering the list

You can change the reminders displayed according to the status and whether the reminder is for you to complete or was created by you.

To show only complete or in-complete reminders, choose from the status drop-down list.

Reminder details window



Date: The due date of the task

Assigned to: By default you create reminders for yourself, but you can also create them for other users. If you're the micro-managing type, you could put everyone else's work plans in for each day or week!

Message: The text of the reminder message. Reminders may be shown in any one of eight colours, according to the colour selected when you click on the box in the upper right corner of the *New Reminder* or *Edit Reminder* window

Completed: Check this box if the reminder is completed (but note that it won't usually show in the list once it is checked)

Repeats automatically: Once this box is checked, you will be shown options for the reminder to repeat daily, weekly or monthly.

Options for repeating reminders:

- **Start date:** the first date after which the reminder will repeat. For example, if you want an event to repeat every Wednesday, you'd set this date to the first Wednesday you want the reminder to repeat on
- **Every X days/weeks/months:** For example, if you want a reminder to be created every three months to do a stocktake, you'd enter **3** and choose **months**
- **Preview button:** clicking this button shows a window with a list of dates that the reminder will recur on.

Colour: Use the Drop-down list of colours to set a reminder colour. This colour will be used to colour the reminder in the list. For example, you might want to choose Red for all tasks you intend to do today.

Previous: [26.01. Miscellaneous topics](#) | | Next: [26.03. Transaction Status & Type Codes](#)

26.03. Transaction Status & Type Codes

Transaction type codes

mSupply uses a series of two letter codes to denote the different types of transactions it can handle.

Code	Meaning
ci	customer invoice (goods supplied to a customer)

Code	Meaning
cc	customer credit (goods returned by a customer)
si	supplier invoice (goods received from a supplier)
sc	supplier credit (goods returned by you to a supplier)
sr	repack (changing the pack size of a stock line)
bu	build (manufacturing (building) items from other items in stock)
rc	receipt (cash receipt) from a customer (a customer pays for invoices issued)
ps	payment (cash payment) to a supplier



Inventory adjustments have a type of “si” if stock is being increased and “sc” if stock is being reduced. They have a reserved name whose name[type] field has a value of “invad”

Transaction status codes

Transaction (and requisition) status

mSupply uses a set of two letter codes to keep track of the status of each transaction:

Code	Meaning
nw	new invoice
sg	Suggested
cn	Confirmed
fn	Finalised
wp	The order has been received over the internet (a “web” order), and it is currently being processed
wf	The order has been received over the internet (a “web” order), and it is finalised

Purchase Orders

Code	Meaning
sg	The order has been created, but the “stock on order” value for each item has not yet been updated. If another order for the same item is processed, mSupply will not take account of suggested orders. Suggested orders can be deleted.
cn	The “stock on order value” for each item has been updated. Confirmed orders can also be “unconfirmed” if you cancel an order. Items & quantities can still be edited.
fn	The order has been received, Goods Receipts and Supplier Invoices have been created for all stock received. The order is now completed and all stock not delivered is no longer considered “on order”. No more stock can be received.

Supplier invoices

Code	Meaning
nw	The “new supplier invoice” menu item has been chosen, but the OK button on the invoice has not yet been pressed, or confirming the invoice has been postponed. (This option is only available if “confirm supplier invoices automatically” is unchecked in the Preferences). <i>Note: quitting mSupply by choosing the “quit” command from the file menu or click the application close box (Windows only) while you are entering a new supplier invoice will result in the invoice being saved with status “nw”. To confirm the invoice, open it then click the OK button</i>
sg	This status is not used for supplier invoices- invoices of status “nw” become status “cn” when the OK button on the form is pressed
cn	The invoice has been entered, but can still be edited.
fn	The invoice has been finalised , and can no longer be edited.

Customer invoices

Code	Meaning
nw	The “customer new invoice...” menu item has been chosen, but the OK or “confirm” button has not yet been pressed.
sg	The invoice has been created. An order from a customer has been received, and the items put against the invoice are still in your store, but are no longer “available” to issue to other customers. (i.e., the “available” amount for each item line has been reduced, but the “quantity” amount has not). Note that if “one step confirm” is checked in the Preferences, then customer invoices move straight from being status “nw” to status “cn”
cn	The invoice has been confirmed by clicking the “confirm” button, which is done when the stock leaves the store. Lines that couldn't be supplied are added to the “backorder” file. The invoice can still be edited.
fn	The invoice has been finalised, and can no longer be edited. If the Customer invoice is to another store in your system, then finalisation of the Customer Invoice also triggers generation in the receiving store of the Supplier Invoice or Goods Receipt (if the Customer Invoice is the result of a Purchase Order / Requisition from the receiving store)

Builds

Code	Meaning
nw	The build is being entered for the first time.
sg	Suggested - the raw materials are taken out of stock, but the finished product (the item to build) is not yet entered into stock.”
cn	Confirmed - the raw materials are taken out of stock and the finished product is entered into stock
fn	Finalised - the build can no longer be edited

Previous: [26.02. Reminders](#) | | Next: [26.04. Budgets](#)

26.07. Virtual stores

From the *Special* menu, choose *Show stores*

What is a virtual store?

In mSupply a *virtual store* is a way of segregating particular stock so that some users only see that stock and the transactions associated with it. When a user logs into mSupply, they choose a particular store to login to - this we call the current store. mSupply then operates as if:

1. The stock in that store is the only stock available.
2. Only stock from the current store will be available for issuing,
3. Reports will relate to stock in that store
4. Issues from and receipts to that store only use the stock in that store
5. Only suppliers and customers sets as “visible” for that store will be able to be chosen for receiving and issuing goods
6. Only items set as “visible” in that store will be usable (So for example if you have a store that handles only vaccines you can make vaccines visible in that store (and invisible in all stores that don't handle vaccines)

Many users of mSupply will only have a single store, and so will have no need of this functionality.

The following examples illustrate situations where you might want to run more than one store.

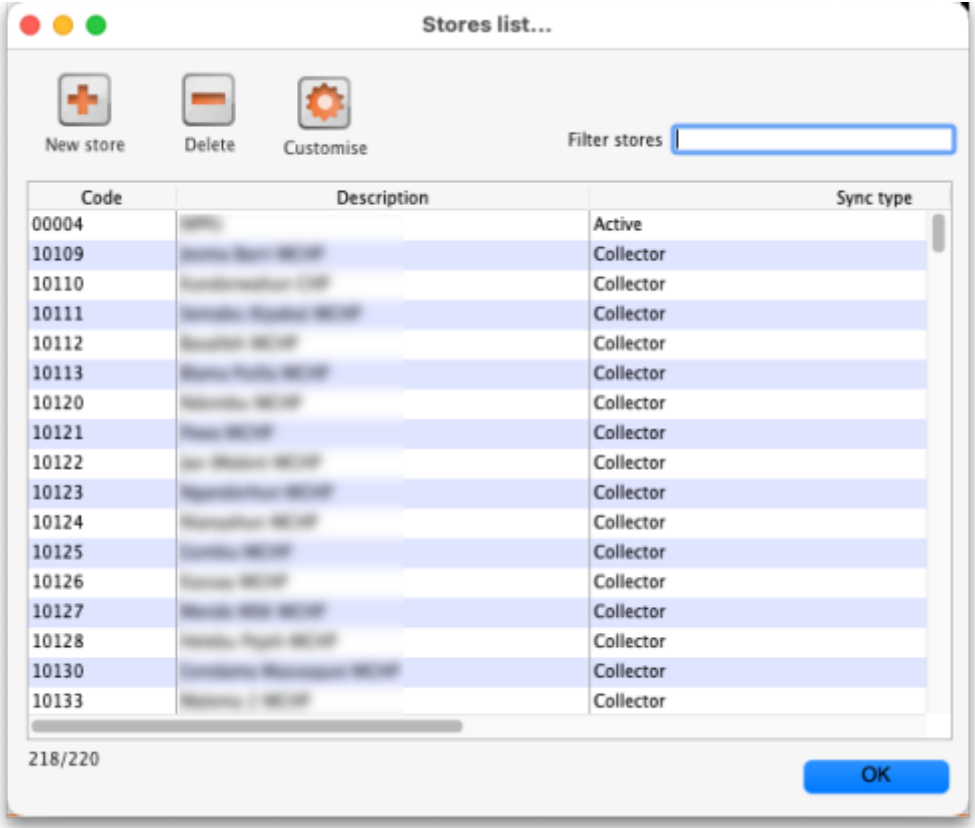
- A hospital pharmacy where you have two dispensing locations: an inpatient pharmacy and an outpatient pharmacy.
- A pharmaceutical warehouse where stock from a particular donor is received, issued and accounted for separately to stock in the rest of the warehouse.
- A hospital pharmacy where the pharmacy store stock is treated separately to the dispensary stock. You would set up mSupply with a store called “Pharmacy store” and a store called “Dispensary”. You would use the function covered in section [8.05. Transferring goods to another store](#) to move stock from the pharmacy store to the dispensary.
- A pharmaceutical warehouse where you have 2 or more actual warehouses. These may be adjacent or several hundred kilometres apart. (Of course you need network connectivity between sites to run mSupply at each site).
- You're using mSupply mobile- each mobile site will synchronise data with a virtual store on the mSupply server.

Note: In the above examples, when you log on, you would select the appropriate mode - see table:

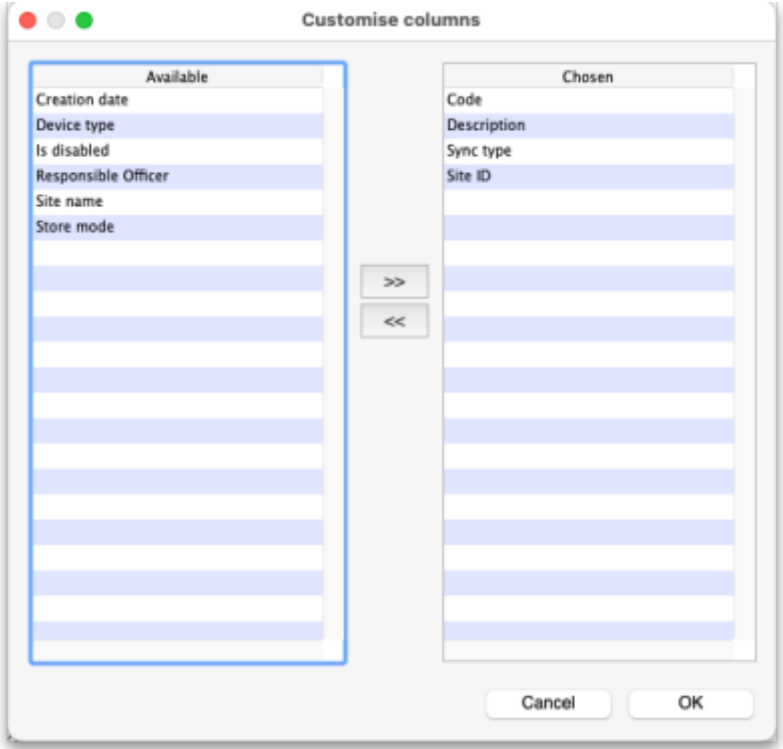
Examples	Stores	Log on mode
Hospital Pharmacy	In-patient Dispensary	Dispensary
	Out-patient Dispensary	Dispensary
Hospital Pharmacy	Pharmacy store	Store
	Dispensary	Dispensary
Warehouse	Adjacent Store	Store
	Remote store	Store

Viewing available stores

From the *Special* drop down menu click *Show stores...* The Stores list window (shown below) appears and displays a list of all the stores which currently exist including their [sync type](#):



You can customise the columns that show on this window. Click on the **Customise** button and this window will show:



The columns in the *Chosen* list are displayed in the table, the columns in the *Available* List can be shosen to be displayed. Select a column you want to show in the *Available* list and click on the » button to move it to the *Chosen* list. Similarly, click on one in the *Chosen* list and click on the « button to move it to the *Available* list and remove it from the display. You can also drag items in the *Chosen* list up and down to change the order they appear; top of the left is the leftmost column, bottom of the

list is the rightmost column.

Editing a store

Double-click on any store in the list in the View stores window described [above](#) to view or edit its details. You will see the same window as in the [Creating new stores](#) section below but the various fields will be filled in with the store's current settings. You can click into the fields and edit them as desired. Note that in the top left of the window, the name of the store you are editing is always displayed, regardless of which tab you are on, so that you always have a reminder of which store you are editing!



If you're working within a [syncing system](#), stores and their settings/preferences can only be created and edited on the central server, and all stores exist on the central server. A mirror sync setup is slightly more complex - stores themselves and any settings related to **name** visibility are only editable on the central server (or the primary server in versions of mSupply older than v7.13), but master lists and **item** visibility settings are only editable on the primary server. In this case, all stores exist on both the central server and the primary server.

Creating new stores



This new store will inherit the same user and group permissions (but not login permissions!) as the store which you are logged in to when you execute it. It is therefore worth logging in to a store that has similar user and group permissions to those that you want to have in the new store. Often the supplying store will be a suitable store for this purpose.

As noted above, in a syncing system you must be logged into the central server to create a new store - it will be synced to any site where it is visible to any stores active on that site (which will also include the supplying store). When a store is created, it is made active on the central server by default - see [sync sites](#) if you want to move it to (make it active on) another site.



After creating the new store, you will not be able to immediately log in to it. To be able to log in to the new store, you will need to give yourself access to the new store



as shown in section [25.15. Managing users](#). Any other users who need to access the store will also need their permission altered accordingly.

To create a new store click the **New store** button in the Store list window shown [above](#). This will display the Store details window shown below, which allows you to enter the details of the new store:



If you want to create the store for an existing customer, don't follow the rest of the instructions here. Refer to [Transition a customer to a virtual store](#).

Name

The name used to identify the store throughout mSupply. It must be unique and mSupply will tell you if another store has the same name; you will need to change it before you can save. Any non-printable characters entered before or after the name will be removed. Any entered in the name will be replaced with an underscore (_).

Store code

The code used to identify the store. If you have a lot of stores it would be helpful if you decide on a good pattern to use for the codes. The code must be unique too; mSupply will tell you if the code is

already in use and you will need to change it before you can save it. Any non-printable characters entered before or after the code will be removed. Any entered in the code (and spaces) will be replaced with an underscore (_).

Store type

Set in the drop down list to the right of the *Store code* field. Can be one of:

- Store: a normal store used for managing inventory and issuing to customers
- Dispensary: a store used for managing inventory and dispensing to patients

Organisation name

The name of the organisation running the store. Defaults to the organisation name entered in File > Preferences.

Address details

Enter the address and contact details for the store in here if there are any. These details can be used in reports. Note that these fields will be copied to the **Main/Billing Address** fields in the store's name record (see the [5.01. Names: using, adding and editing](#) page for details) if they are updated.

Turn an existing customer into a store

Only visible if you are creating a new store, not if you are editing an existing one. If this is checked then the **Name** field becomes a search field for the customer: enter the first few characters of the customer's name and press the *Tab* key on the keyboard to select the name from all those that begin with what you entered (or mSupply will select it for you if only one customer matches). When the **OK** or **OK & Next** buttons are clicked, the existing customer record will become this new store.

Down arrow button

Only visible if editing an existing store, not when creating a new one. Clicking this button will open the store's name record (see the [5.01. Names: using, adding and editing](#) page for information on names) where you can view and edit things like categories.

Disable this store

Check the *Disable this store* checkbox to stop the store from being used. You might want to use this feature if the store is not ready for use yet or is no longer to be used and can't be deleted. You will be asked to confirm the disabling after clicking on the *OK* button on this window.

Responsible officer

Select the officer responsible for the store in this drop down list. A helpful reminder for others and can be used in reports.

Store credentials

These are used when the store needs to be identified securely over electronic communications. An example of this is when using the cold chain app for monitoring temperature in cold storage and freezers.

To tell mSupply to use the credentials, check the **Use store credentials** checkbox (unchecking it deletes the store's credentials so please be careful before doing so).

This will enable the **Username** and **Password** text fields and you can enter the appropriate details.

- The *Username* will be set to the first three letters of the store's code by default.
- The *Password* must be at least 4 symbols but not more than 30 symbols, and can contain letters and numbers.

If you need to view the password you have entered to check it is correct, click on the  button.

Tags

Tags are used in several ways:

- for determining which programs a store can use.
- for controlling some customisation features.
- for reporting to group stores together.

This area shows the tags that the store currently has. To add a tag, simply click into the area and type the tag's name. When you have finished typing the tag's name then press the Tab or Space keys on the keyboard (not Enter or return, that will close the window!). You know when you have done it right because the tag will appear in its own little box with an 'x'. If you want to remove any tag from the store, simply click on that 'x'. In this way you can add or delete as many tags from a store as you like.

When you click on the **OK**, **OK & Next** or **OK & Previous** buttons, any new tags you have created here will be added to the list of name tags in your system. See the [5.05. Name tags](#) page for details.

After having created a new store, the Stores list window will display the new list of all stores and you may double-click an entry to edit that store's details. A number of things that will need to be attended to are:



To do a number of the following steps, you will need to log in to the new store. To do this, you will need to give yourself access to the new store as shown in section [25.15. Managing users](#). Any other users who need to access the store will also need their permission altered accordingly. After giving yourself permission to log in to the new



store, log in to it and carry out these steps.

- Set the [preferences](#) for the store.
- Set the store's [logo](#) so that it can appear in print-outs and reports.
- Set the [visibility](#) of names and items in the store. All items in the system will be set to invisible in the new store when it is created. You will need to modify visibility of items in order to be able to handle stock of those items.
- Setup any [custom store data](#) (used for reporting).
- Set the master lists used by the store (a convenient method for controlling item visibility). See [4.04. Item master lists](#)

Preferences tab



- The preferences described here are set 'per store' and can be different for each store in an mSupply datafile.
- In a **synced system** the store preferences will be synced along with the store to any sites where the store is visible.
- Other preferences (accessed through **File > Preferences...**) apply to *all* stores in an mSupply datafile.
- If you have to set the same preferences for lots of stores you might like to try the [26.08. Bulk Store Preferences Editor](#). It just might save you some time and your

sanity



This tab contains the preferences that can be set for a store. Each store has its own settings for these preferences: this is different for the settings in *File > Preferences* which apply to **all** stores in an mSupply datafile.

This is what the tab looks like:

Edit store

General Warehouse

General **Preferences** Master lists Logo Visibility Custom fields Users Names Log

Search store preferences...

Store preference	Status
Sort available batches by VVM Status rather than Expiry	<input type="checkbox"/>
Patients created in other stores not visible in this store	<input checked="" type="checkbox"/>
Names created in other stores not visible in this store	<input checked="" type="checkbox"/>
Allow users to enter total quantities to distribute	<input type="checkbox"/>
Round up the distributed quantity	<input type="checkbox"/>
Able to pack items into multiple boxes	<input type="checkbox"/>
Store: Able to issue in foreign currency	<input type="checkbox"/>
Allow editing selling price on customer invoice lines	<input type="checkbox"/>
Purchase order must be authorised	<input type="checkbox"/>
Finalise customer invoices automatically	<input type="checkbox"/>
Customer invoices must be authorised	<input type="checkbox"/>
Authorisation needed only if over budget	<input type="checkbox"/>
Confirm customer invoices automatically	<input type="checkbox"/>
Supplier invoices must be authorised	<input type="checkbox"/>
Confirm Supplier Invoices without asking	<input type="checkbox"/>
Disallow adding expired stock to supplier invoices	<input type="checkbox"/>
Goods received lines must be authorised.	<input type="checkbox"/>
Locations must be entered for goods received.	<input type="checkbox"/>
Able to specify manufacturer when receiving, ordering or quoting for items	<input type="checkbox"/>
Show item unit column while issuing	<input type="checkbox"/>
Log transaction edit	<input type="checkbox"/>
Set pack to one for all visible items in this store	<input checked="" type="checkbox"/>
Use remote authorisation for response requisitions	<input type="checkbox"/>
Include requisitions from this store in suppliers' remote authorisation processes	<input type="checkbox"/>
Can manually link requisition to supplier invoice	<input type="checkbox"/>

Notification preferences

Threshold for overstock months

Threshold for understock months

Expiring items period months

Stocktake frequency months

Average monthly consumption

Monthly consumption look back period

Months lead time

Suggested packing in boxes

Prefix for generated boxes

Percentage space to leave empty

When finalising a Goods Receipt

☒ Don't receive goods into stock until Supplier Invoice is taken off hold

☐ Receive goods into stock, and leave Supplier Invoice confirmed

☐ Receive goods into stock, and finalise Supplier Invoice immediately

For stock transfers, the Supplier Invoice in the receiving store should be:

☐ Finalised ☒ On hold

Location code pattern

OK & Previous OK & Next Cancel **OK**

The **Search store preferences** search bar at the top is used to find a particular preference. If you type something in here, preferences which *contain the text* you have typed only are displayed, all others are hidden. There are a lot of preferences so this should help if you just can't find the one you want!

This is what each preference does:

Sort available batches by VVM status rather than Expiry	When issuing stock, this will sort the list of available batches by vaccine status first, then by expiry date rather than by expiry date first (e.g. 8.01. Issuing goods to a customer (customer invoices)).
Patients created in other stores not visible in this store	If this is checked, patients that are created in other stores across all sites will not be visible in this store. If it is off , all patients from all stores from all sites will be visible to this store. It is set to true by default when a store is created. USE CAUTION: Turning this OFF for many stores does not scale well and can overload the sync system. See the 10.03. Patients page for more details.
Names created in other stores not visible in this store	If this is checked, names (customers, suppliers, manufacturers, donors etc.) created in other stores in the same site will not be visible in this store. It is set to true by default when a store is created.
Allow users to enter total quantities to distribute to appropriate packs	On a customer invoice an additional Total field is displayed so that users can enter the total quantity of units that they wish to distribute or the number of packs.
Round up the distributed quantity	The value for distributed quantities will be rounded upwards.
Able to pack items into multiple boxes	Checking this enables the functionality for packaging goods into boxes on the <i>Transport</i> tab of a customer invoice. See 8.06. Box management for details.

Store: Able to issue in foreign currency	Foreign currencies can be used on supplier invoices for overseas suppliers.
Allow editing selling price on customer invoice lines	Individual selling prices can be edited on customer invoice lines. Please note that the Price editable when issuing checkbox on the <i>General</i> tab of an item's details page must also be checked for each item that the price is to be editable for.
Purchase order must be authorised	Turns on purchase order authorisation. See Ordering Items From Suppliers .
Finalise customer invoice automatically	Automatically finalise customer invoices with confirmed status, which is normally when the goods are dispatched.
Customer invoices must be authorised	Turns on customer invoice authorisation (i.e. goods can only be sent to a customer after the action has been authorised). See 26.14. Authorisation for details.
Authorisation needed only if over budget	This additional option is enabled when customer invoice authorisation is turned on.
Confirm customer invoices automatically	Set a New Customer Invoice status to confirmed when the OK button is clicked. This means that it is not possible to print a picking slip for the issued goods.
Supplier invoices must be authorised	Turns on supplier invoice authorisation (i.e. goods can only be brought into stock when the action has been authorised). See 26.14. Authorisation for details.
Confirm supplier invoices without asking	Sets a new Supplier Invoice status to confirmed automatically when it is saved (i.e. when the OK button is clicked), with no request for confirmation. The goods are made available in stock without informing the user.
Disallow adding expired stock to supplier invoices	If checked then a user will not be allowed to add stock which is already expired to a supplier invoice. If a user does this, they will be shown an alert message saying that the line is expired and they will not be allowed to save it. The same check is also performed when adding lines to a goods received note, an inventory adjustment - add or a customer credit.
Goods received lines must be authorised:	Turns on goods receipt authorisation (i.e. only authorised goods receipts can be processed for the goods to be made available in stock). See 26.14. Authorisation for details.
Locations must be entered for goods received	A shelf location must be entered on the goods receipt item line form when receiving goods into stock.
Able to specify manufacturer when receiving, ordering or quoting for items	Gives users the option to record the manufacturer of goods when making purchase orders, goods receipts or entering a quotation from a supplier.
Show item unit column when issuing	If checked, when goods are issued on a customer invoice or prescription, an Item unit column is included in the window used for selecting items to add.
Log transaction edit	
Set pack to one for all visible items in this store	
Use remote authorisation for response requisitions	Turns on remote authorisation for response requisitions. See 26.15. Remote authorisation for details.
Include requisitions from this store in suppliers' remote authorisation processes	If checked then requisitions from this store will appear in the requisition approval processes of the supplying store. See 26.15. Remote authorisation for details.

Can manually link requisition to supplier invoice	When receiving stock, users can match the supplier invoice to the initial requisition. They can then add items from the linked requisition, speeding up the process of creating the supplier invoice. This is useful for stores requesting and receiving stock from suppliers that do <i>not</i> use mSupply. See the 7.01. Supplier invoices page for details.
Automatically populate supply quantities with requested quantities	On requisitions, automatically populate supply quantities with requested quantities, instead of 0. Supply quantities can still be edited.
Show extra fields on requisitions	When a line is selected on a response requisition, an extra box is displayed under the table of requisition lines to show the calculations behind the suggested quantity. The extra field is currently only populated for Côte d'Ivoire users.
Keep requisition lines with zero requested quantity on finalise	If this is checked, lines on requisitions that have zero requested quantity are kept when the requisition is finalised. Otherwise they are deleted (normal behaviour).
Show comment field when entering supplier invoice lines	Allows users to type a comment for individual items received on a supplier invoice.
Use EDD placeholder lines in supplier invoices from this store	If turned on, any placeholder lines on a customer invoice that is a stock transfer are duplicated on the supplier invoice in the receiving store when the customer invoice is finalised. The placeholder lines in the supplier invoice appear on an <i>Unsupplied items</i> tab (see the 7.01. Supplier invoices page for details). Note: the placeholder lines are not duplicated on the supplier invoice if the receiving store is an mSupply mobile store (placeholder lines are not used in mobile stores).
Consolidate batches	Items with the same batch, expiry date, pack size, location, donor, cost and sell price will <i>automatically</i> consolidate when bringing goods into stock from a supplier invoice or doing a stocktake.
Edit prescribed quantity on prescriptions	When checked an additional Prescribed quantity field is available when entering a prescription line. See 10.02. Prescription entry for details.
Allow users to choose diagnosis on prescriptions	When checked an additional Diagnosis drop down list is available on a prescription. See 10.07. Diagnoses for details.
Use consumption and stock from customers for internal orders	If checked, when calculating the current stock and consumption figures (to calculate the suggested order quantity), the stock issued to all customers and the total stock of all customers will be used instead of the current stock and consumption of the current store. Note that customer stores are all those stores that have this store set as their supplying store. See the 6.04. Ordering from one store to another page for details about internal orders.
Items received on a purchase order must be within a minimum expiry date	When turned on, stock cannot be received if it has an expiry date that is before a date set on a purchase order. See mSupply mobile setup for details.
Store credentials are controlled on the central server	In a syncing system , if this preference is checked, then the <i>Store credentials</i> preferences (see the Store credentials section above for details) can only be edited on the central server, rather than on the site where the store is active (where they are usually edited).
mobile: Alert if a patient is dispensed the same vaccine multiple times in a week	This preference only has an effect if this is an mSupply mobile store. See mSupply mobile setup for details.

mobile: Enforce lookback period	This preference only has an effect if this is an mSupply mobile store. See mSupply mobile setup for details.
mobile: Uses vaccine module	This preference only has an effect if this is an mSupply mobile store. See mSupply mobile setup and also 20.01. Vaccine Vial Monitoring (VVM) for details.
mobile: Uses dispensary module	This preference only has an effect if this is an mSupply mobile store. See mSupply mobile setup for details.
mobile: Uses dashboard module	This preference only has an effect if this is an mSupply mobile store. See mSupply mobile setup for details.
mobile: Uses cash register module	This preference only has an effect if this is an mSupply mobile store. See mSupply mobile setup for details.
mobile: Uses payment module	This preference only has an effect if this is an mSupply mobile store. See mSupply mobile setup for details.
mobile: Uses patient types	This preference only has an effect if this is an mSupply mobile store. See mSupply mobile setup for details.
mobile: Uses Hide Snapshot column	This preference only has an effect if this is an mSupply mobile store. See mSupply mobile setup for details.
Pickface replenishments must be authorised	If checked, pickface replenishments in this store must be authorised by a user who has permission to authorise them before they can be finalised. See the 4.21. Pickfaces and Replenishments setup and 4.22. Pickfaces and Replenishments pages for details.
Able to specify VVM status when receiving items	If checked then a new VVM status field will be available on a supplier invoice for the user to select the current VVM status of the batch when it is received on a supplier invoice or inventory adjustment. See the 7.01. Supplier invoices and 4.18. Inventory adjustments pages for details. Also, if checked then an additional <i>Doses</i> column is displayed on a customer invoice. See the 8.01. Issuing goods to a customer (customer invoices) page for details.

Notification preferences

These are used by the notification/alert functionality described on the [14.01. Notifications \(Alerts\)](#) page. The notifications inform users of situations that need their attention. The thresholds that give rise to some of the notifications can be set here.

Threshold for overstock

The minimum months of stock an item must have to be considered as overstocked. i.e. in danger of expiring on the shelf before it is used. An alert is triggered for an item if the total quantity in stock (including all batches) divided by the average monthly consumption of the item (calculated using the last 12 months' usage in the current store) is greater than or equal to this threshold number. The default is 6 months.



This value should be set no lower than the maximum amount of stock that you would expect to regularly have in stock. Based on the formula developed in [Calculating the required stock quantity](#), this would be **Ordering cycle + (months of) buffer stock**. The default value of 6 is suitable for a store with a 2-monthly order cycle. For a central store with an annual order cycle, then this figure should be set to **36**

Threshold for understock

Also called **Buffer stock**, this is the number of months of stock that an item must have less of, to be considered understocked i.e. in danger of not having enough to meet demand. An alert is triggered for an item is the total quantity in stock(including all batches) divided by the average monthly consumption of the item (calculated using the last 12 months' usage in the current store) is less than or equal to this threshold number. The default is 3 months.



This alert should only be triggered when your stock levels fall below your buffer stock levels. Based on the formula developed in [Calculating the required stock quantity](#), **Buffer stock (months) = 2 x Ordering cycle**. The default value of 3 is suitable for a store with a 6-weekly order cycle. For a central store with an annual order cycle, then this figure should be set to **24**. That is a lot of space for a national store with several thousand items 😞

Expiring items period

An alert will be triggered for an item if a batch is due to expire in less than this number of months. The default is 3 months.



This alert should be triggered if there is a reasonable risk that your store, *or your store's customers* will need to dispose of stock due to expiry. However, this is only a real concern if there are *significant quantities* of the item with short expiry. So, in isolation, Expiring items period is a bit arbitrary. As a rule of thumb, the Expiring items period can be set to equal the ordering cycle. On that basis, the default value of 3 is suitable for a store with a 3-monthly order cycle. For a central store with an annual order cycle, then this figure should be set to **12**

Custom data

This section is for store specific custom data fields that must always be present. User definable custom fields are handled on the Custom fields tab (see the [Custom fields tab](#) section below for details).

Monthly consumption lookback period: The number of months of consumption information to use when calculating average monthly consumption for this store. Currently only used when the Côte d'Ivoire customisation is enabled.

Months lead time: The number of months before ordered goods normally arrive. Used to calculate how much stock to order for the suggested quantity in requisitions, for example. Currently only used when the Côte d'Ivoire customisation is enabled.

Suggested packing in boxes

These preferences affect the suggested pack functionality described on the [8.06. Box management](#) page.

- **Prefix for generated boxes:** Defaults to no prefix. Each box created in a suggested pack has a number which starts at 1 and increments by 1 for each new box created. Whatever you enter in this text field will be added before these numbers to give you the box names. For example, if you enter "Box-" then the boxes will be created with names "Box-1", "Box-2", "Box-3" etc.
- **Percentage space to leave empty:** Defaults to 0. Boxes will be packed as close to 100% of their volume minus the value entered in here. This is helpful to account for situations where the size, shape and possible orientation of packs make it hard to pack them all into the actual volume expected.

When finalising a goods receipt

There are three options:

- Don't receive goods into stock until supplier invoice is taken off hold - for goods to enter stock you must finalise the goods receipt and then take the automatically generated supplier invoice off hold
- Receive goods into stock, and leave supplier invoice confirmed - goods enter stock as soon as the goods receipt is finalised. The automatically generated supplier invoice is created with confirmed status.
- Receive goods into stock, and finalise supplier invoice immediately - goods enter stock as soon as the goods receipt is finalised. The automatically generated supplier invoice is created with finalised status.

How you set this preference is determined by how separate your goods receiving and finance sections are. If they are not in the same building, you might want to use the "Receive into stock and leave confirmed" option, as this will allow you to proceed with issuing goods without waiting for the finance department's approval.

For stock transfers, the supplier invoice in the receiving store should be...



This option applies to all stores that this store transfers stock to.

This option is used to determine whether stock transferred from one store to another is received to a destination store and automatically introduced to stock or not. The **On hold** option prevents stock from being introduced, while the **Finalised** option automatically makes the stock available for use in the destination store - ***without the receiving store having the opportunity to amend the Goods Receipt.***

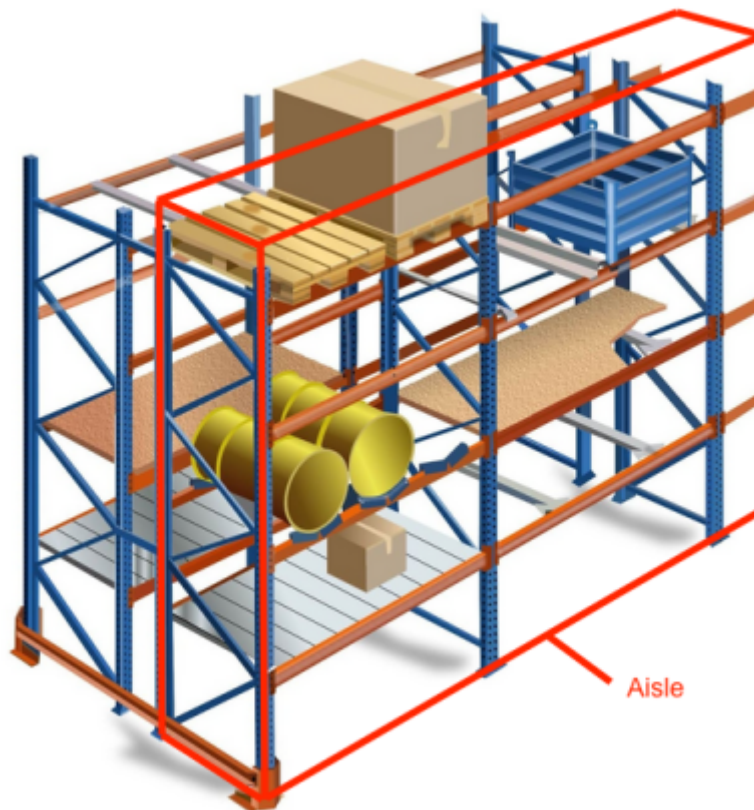
- Choose **Finalised** if there is no need to check / alter the quantity received compared to what was sent.

- Choose **On hold** if the store is being used by mSupply mobile, and the goods receipt needs to be confirmed before receiving.

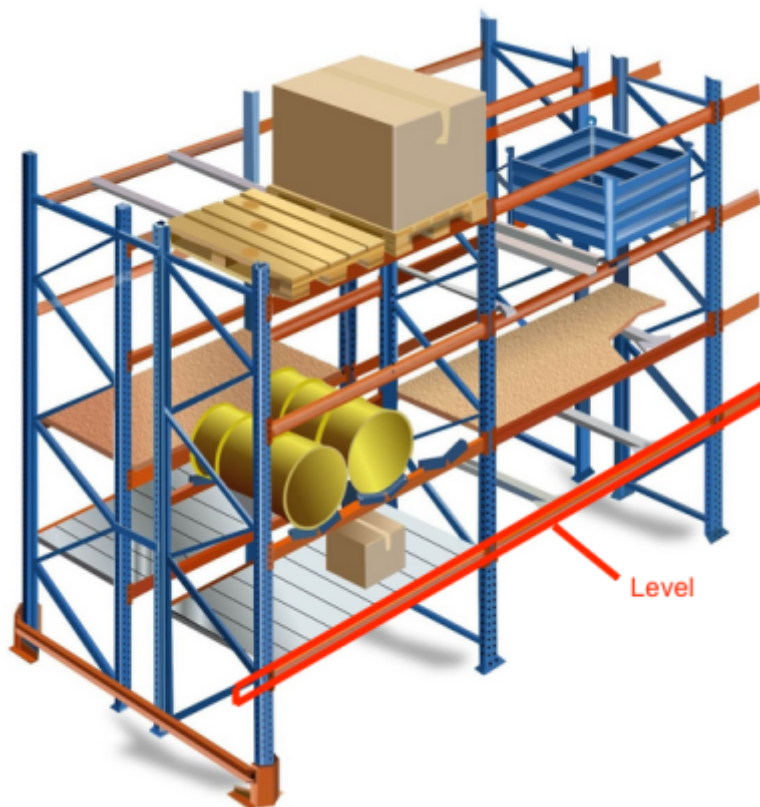
Location code pattern

This is used with phased stocktakes (see the [4.18. Phased stocktakes](#) page for details) to tell mSupply which parts of your shelf location codes (see the [4.06. Stock locations and location types](#) page for details) represent the aisle, level and position of the location.

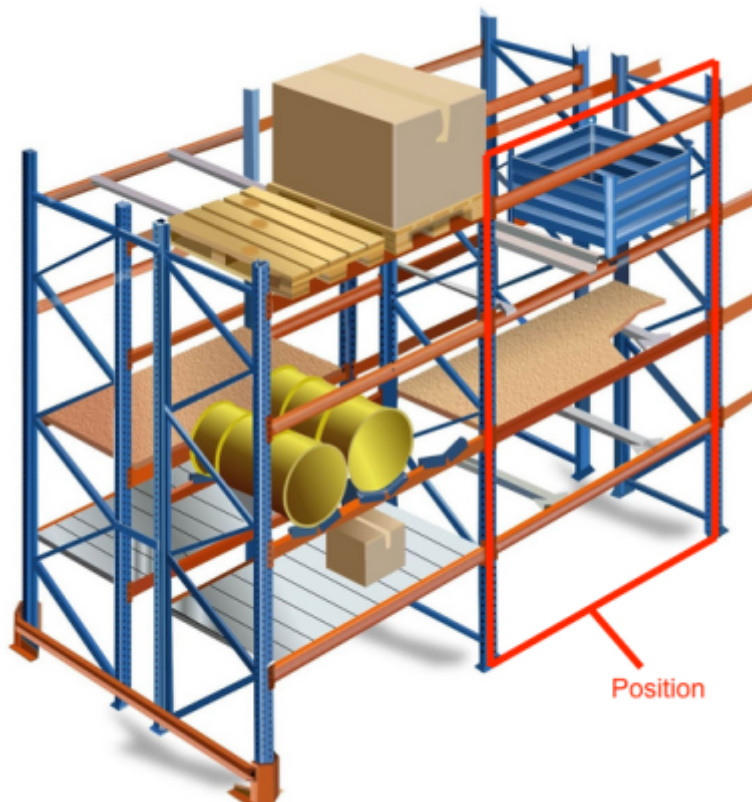
An aisle is a whole row of racking like this:



A level is a horizontal level of the racking like this:



And a position is a vertical column of the racking like this:



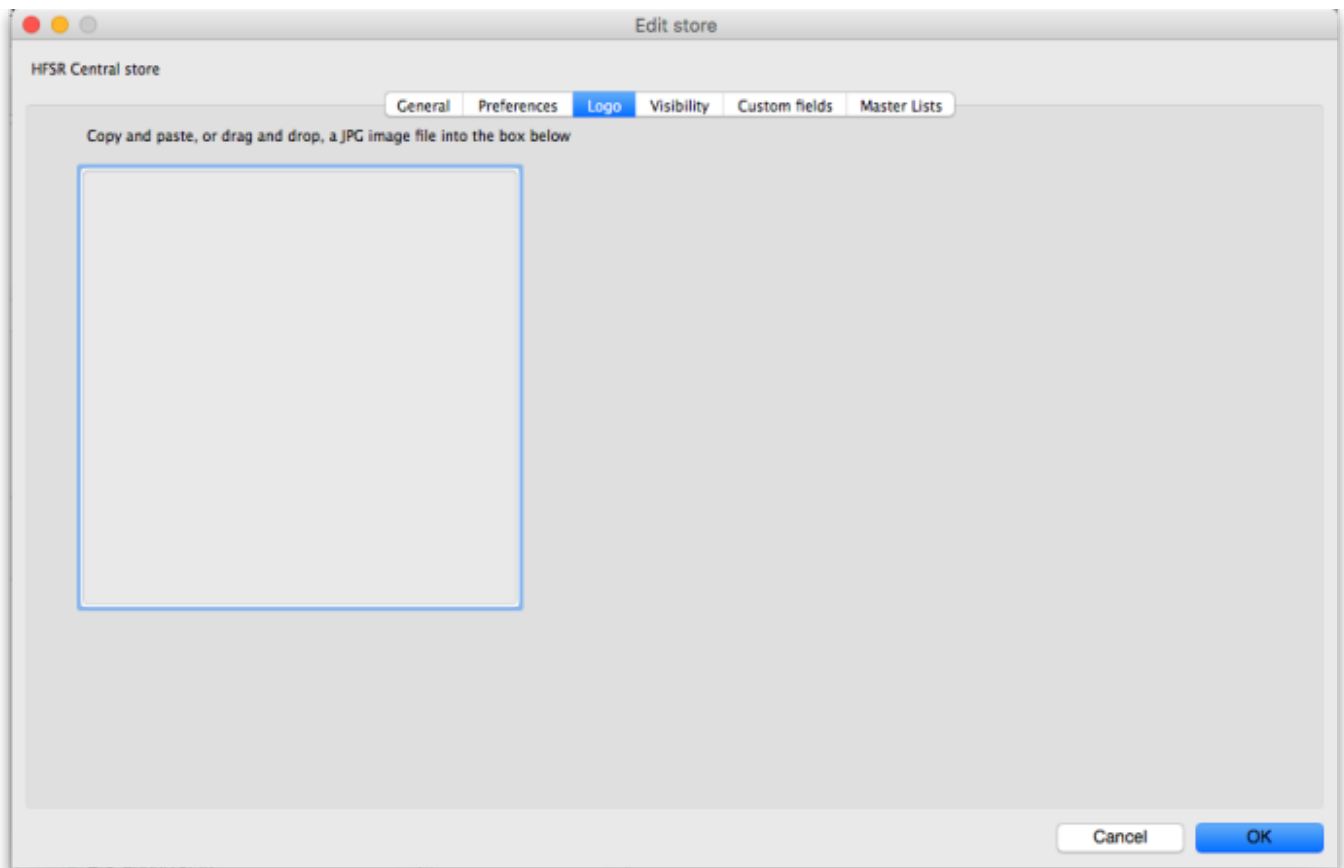
Use the letters A, L and P to represent the aisle, level and position parts of the location code.

Let's use an example to show how it works. Let's say that the shelf location codes are in the format

B01.C.01 where B01 represents the aisle, C represents the position and 01 represents the level. Then in the **Location code pattern** text box you would enter the text **AAA.P.LL**

It doesn't matter what characters you use as separators, mSupply only looks for the positions of the letters A, P and L. If more than one character is used to define any of the three parts of the location then they must appear together in the location code pattern.

Logo tab



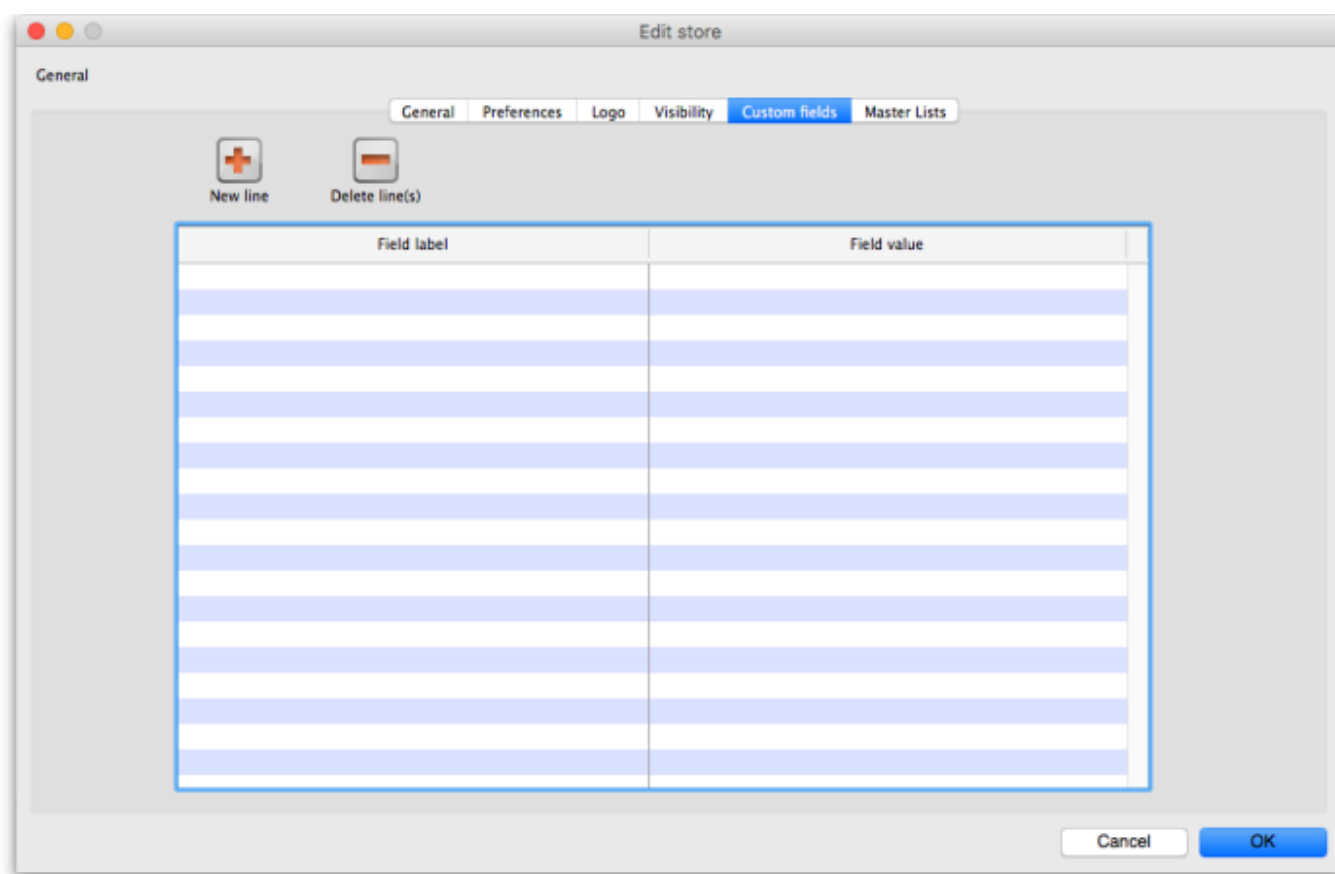
Here you can set the **store logo** by pasting in a logo you have copied to the clipboard - you must copy the contents of a file to the clipboard, not the file itself. The file can be in .jpg, .png, .bmp, .gif, or .tiff format. This logo will be displayed at the bottom right of the mSupply navigator screen when you login to this store only.

This store logo will override the logo saved in the [Settings > Preferences > Logo](#) tab.

To print this store logo on standard customer and supplier invoices etc. you will need to go to the [Settings > Preferences > Logo](#) tab in mSupply and tick the **Display logo on invoice** checkbox. When a store logo is set it will print the store logo instead of the logo set on that preferences tab.

Note that after saving the store logo you must login to mSupply again or use the [switch function](#) to reload this store to see it.

Custom fields tab



This tab shows the custom fields that have been set up for stores (see the [Custom fields](#) section for details). You can also add or edit custom fields directly from this screen.

Adding a custom field

To add a new field, click on the *New line* button; a new line with default values of “Field label” and “Field value” in the two columns is added to the table and highlighted. Click on the value in each column and type the real label and value for the piece of information.

Editing an existing custom field

To edit the label or value of any custom field, simply click on the cell in the table and edit the entry.

Deleting a custom field

To delete any custom field simply select its row in the table and click on the *Delete line(s)* button. You can use Shift+click, Control+click, Control A (or Cmd instead of Ctrl if you're using a Mac!) to select multiple lines and delete them all at once if you like.

Master lists tab and Visibility tab (controlling item visibility)

Controlling the visibility of items in different stores is important because you can only order, distribute, receive goods for, and report on items that are visible in your store. It's also important that stores don't have items visible that they don't use so that they don't accidentally order them etc.



In a syncing system, item visibility and master lists can only be edited on the primary server ⇒ if it's a mirror sync system, then you'll need to create the store first on the central server and wait for it to sync to the primary.

If you have lots of stores in your data file, managing item visibility can turn into a difficult task. Thankfully, mSupply has some helpful tools to make it simple! There are 2 ways to manage item visibility and you use one or the other, not both:

1. automatically using the Master lists tab or
2. manually using the Visibility tab

Each are useful in different situations and are described below.

Master lists tab

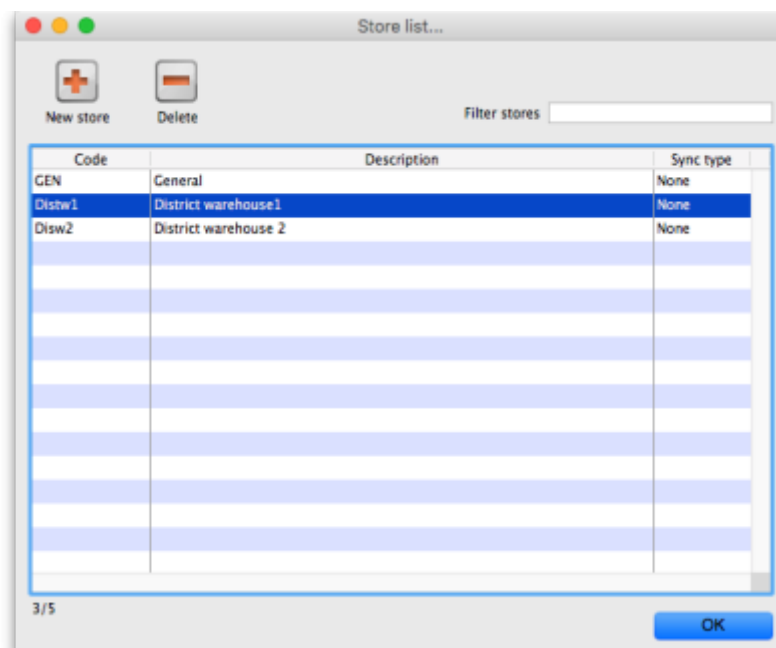
If you have a lot of stores in mSupply, and especially in a syncing system, we recommend that you use master lists to control item visibility, because it means that the visibility of newly created items will be automatically handled correctly. The visibility of items in a store whose visibility is controlled by master lists is immediately updated if any changes are made to any of the master lists. For instance, if a new item is added to a master list controlling visibility then that new item is made visible in all stores that use the master list. And any items deleted from the master list are made invisible in any store using that list.

The first thing to do is to turn on the preference to make master lists control item visibility in stores. Do that in **File > Preferences...** on the *Item* tab - see [General preferences, the item tab](#) for details.

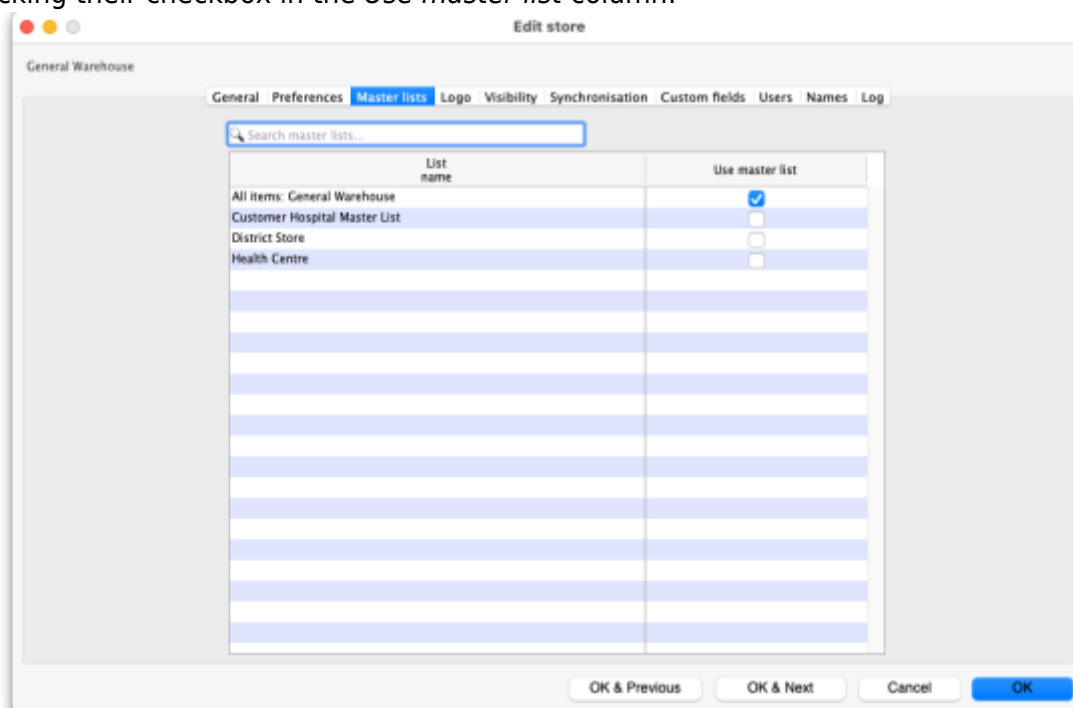
The next thing to do is to create the master list(s) that will control item visibility. See [Item master lists](#) for details on how to do that. Giving your master lists helpful names will help you remember what they're for e.g. "Store xxx visibility list".

Now edit the store to tell mSupply which master list(s) will be used to define which items are visible in the store:

1. Click on **Special > Show stores...** (or click on the *Stores* icon on the *Special* tab of the navigator)
2. Double-click the store whose visibility you would like to manage:



- Click on the *Master lists* tab:
- Select which master list(s) you would like to control the visibility of items in your chosen store by checking their checkbox in the *Use master list* column:



In this example, the *All items: General warehouse* master list has been selected to control the visibility of the General warehouse store. **Please note:** If there are a lot of master lists, you can type in the **Search master lists** field and the list will show only those master lists which contain what you type.

- Click the **OK** button to finish. As soon as you do that the items on the selected master list(s) are made visible in the store and any items **not** on the selected master list(s) are made **invisible**. Any new items added to the selected master list(s) will be made visible in the store and any items removed from the master list(s) will be made invisible in the store.

NOTE: Assigning master lists to stores can also be done on a master list's details window. See the [4.04. Item master lists](#) page for details.

Visibility tab



In a syncing system, the **item** visibility icons and fields will be disabled unless you're on the primary server; the **name** visibility icons and fields will be disabled unless you're on the central server.



You will *only* be able to use this tab if you have permission to login to the store you have selected and you have permission to edit visibility in that store.

To log into a store you may need to first give yourself permission to do so under File > Edit Users > Double-click your user name > the Log in rights tab. Phew!

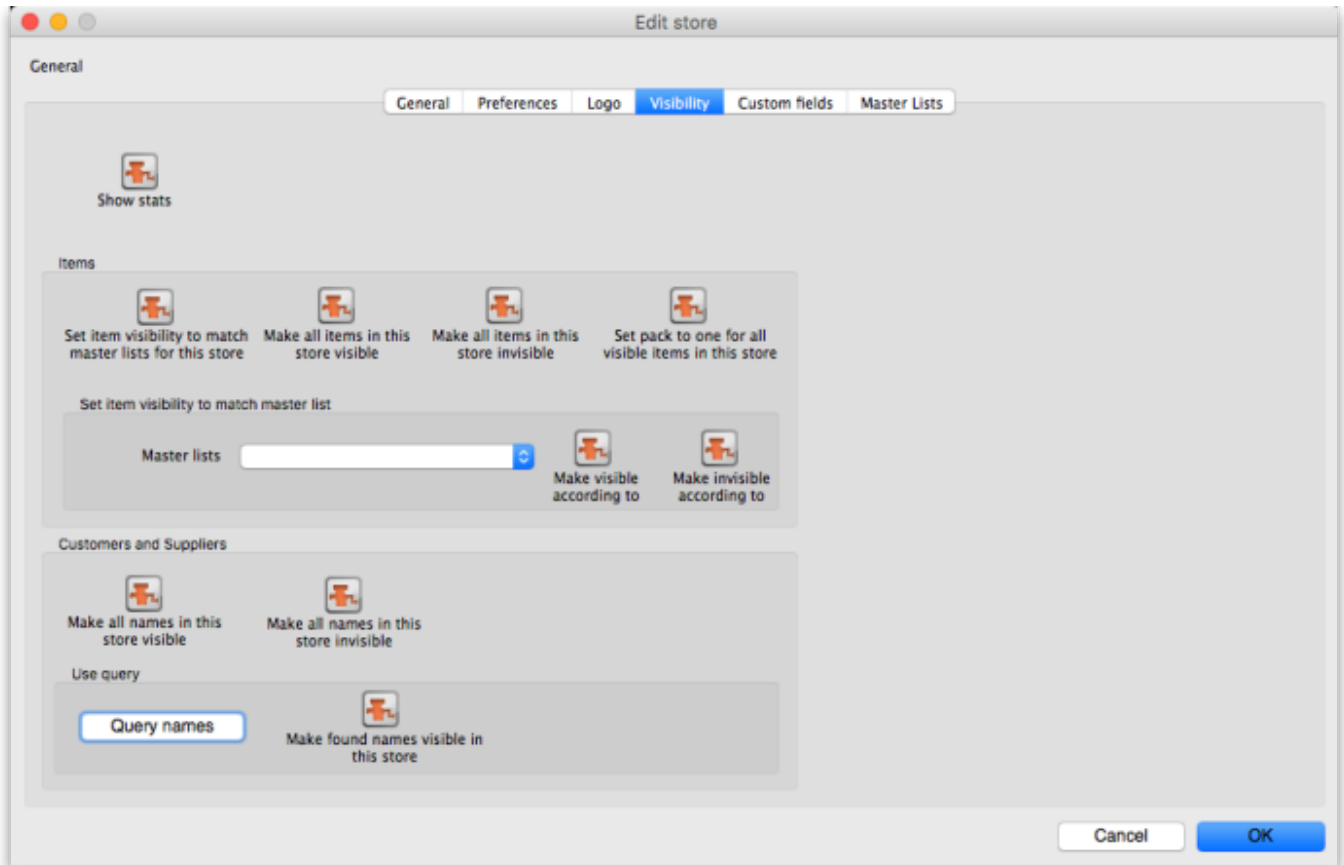
The Visibility tab contains tools for manually setting the visibility of **items** and **names** in a store.

The item visibility tools are good to use if you do not have many stores in mSupply and only need to make occasional changes to visibility for a number of items. If you want to make a change to a single item's visibility in a single store then you can do that by going to the item's details window and using the store tab (see [Item basics](#), [the stores tab](#)).



If you have turned on the [preference to control item visibility by master list](#) then you will not be able to use the visibility tab or the visibility settings on the store tab of an individual item's details window.

[Here's what the tab looks like:](#)



The buttons provide you with different ways to hide and show items and names in the store (Note: be careful showing names in databases that have a lot of names records. For example if you have 20 virtual stores and 200,000 names in your database, showing all names in all stores will create 4 million (20×200,000) records to map the visibility of each name in each store):

- The **Show stats** button shows how many items and names are currently hidden and visible
- The **Set item visibility to match master lists for this store** button matches the item visibility to the master lists that are selected on the *Master lists* tab. (Note: this is a one-off operation, no changes will be made to item visibility if the master lists are changed after you click this button. See the section above if you want that to happen!) If there are some items that can't be set to invisible (because they have stock, for example) a temporary master list will be created containing the items which could not have their visibility removed. Use the list to decide what to do with each item.
- The **Make all items in this store visible** and **Make all items in this store invisible** both do just as they say.
- The **Set pack to one for all visible items in this store** will check the *Allow pack to 1 conversion* and *Convert pack to 1 when receiving* checkboxes for all items in the store so that all stock received into the store will automatically be received in packs of 1. This is useful in a dispensary store, for example.
- The **Set to match** button requires you to choose a master list. Clicking the button makes the items that are on the master list selected in the drop down list next to it visible in the current store. Note that it *does not* hide items that are already visible but not on the master list.
- The **Make all names in this store visible** button does exactly what it says and makes all names in the datafile visible in the current store.
- The **Make all names in this store invisible** button does the opposite and makes all names in the datafile invisible in this store. Be careful using this - you won't be able to receive or distribute stock from/to anyone until you make some names visible in the store!
- The **Query names** button enables you to search for names (customers, suppliers,



The **Resync patient records when store is saved** checkbox forces all patient records to be re-synchronised with the server when the **OK** button is clicked. This is useful if there appears to be something wrong with one or more patient records.

Names tab

This tab shows a list of all the customers, suppliers and stores (collectively called “names”) in the datafile and which are visible in this store. If you're on the central server (and you have edit visibility permissions for the store), you are also able to edit the visibility of names:

Central contraceptives warehouse

General Preferences Master lists Logo Visibility Custom fields Users Names Log

☒ Store ☒ Customer ☒ Supplier Search Names

Code	Name	Is customer	Is supplier	Visible in this store
SDMSA/LFR/SUPP/0007	"CUREJECT GLOBAL NIC,"	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
PSM/OICN/08/001	12 Field Engineeri...Army Barrack, Ilesse	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PSM/CRS/08/001	13 Bde Medical Centre	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PSM/CRS/00/358	146 Batalion Medic...eptin Station (MRS)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PSM/CRS/08/002	146 Batalion Mrs Ikot Ansa- Duplicate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
PSM/CRS/00/303	146 Eburutu Barracks Clinic	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PSM/BEN/13/001	161 Nigerian Air Force Hospital Makurdi	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PSM/ADM/18/100	163 NAF Hospital	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
443	2016 HAJI CAMP CLINIC	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PSM/OICN/01/038	3 Alamaia 35 Afb Barracks Clinic	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PSM/PLT/02/001	3 Division Hospital Jos	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
XCVDS	3-BETA CREAM	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
GOM1	301 Army Barracks Clinic	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
PSM/GMB/06/001	301 Mrs Gombe	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
PSM/ANB/17/001	302 Artillery Regi...tion Station Onitsha	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
PSM/ANB/17/001-dupli	302 Medical Reception Centre Onitsha	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
1910041101	312 Artillery MRS	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PSM/PLT/16/006	332 Army Barrack	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PSM/BEN/00/179	401 SF Brigade Medical Center	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PSM/LAG/18/001	445 NAF Hospital Ikeja	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PSM/BEN/13/001-dupli	45 Nigeria Air Forc...I (45 Nafh Makurdi)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

All off Copy Paste

Total Names Selected: 2144

OK & Previous OK & Next Cancel OK

The table shows whether the name is a customer or supplier (or both). The checkboxes in the **Visible in this store** column are editable. If checked then the name is visible in this store, if unchecked then the name is not visible in this store. Click on one of the checkboxes to change its state.

- **Store checkbox:** If checked then names that are stores are shown in the table
- **Customer checkbox:** If checked then names that are customers are shown in the table
- **Supplier checkbox:** If checked then names that are suppliers are shown in the table
- **Search names field:** If you type in here then only names that contain what you type will be displayed in the list. Useful if you want to find a particular name or group of names in a long list.
- **All off button:** Clicking this will uncheck all the checkboxes in the **Visible in this store** column (so making all names invisible in this store) and the button will change to **All on**. Clicking it then will check all the checkboxes in the column (and therefore make all names visible in this store).
- **Copy button:** Copies the current state of all the checkboxes in the **Visible in this store** column.
- **Paste button:** Pastes the states of checkboxes saved using the **Copy** button to the names in the table. Doesn't do anything if you haven't previously clicked the **Copy** button.

Clicking on the **OK**, **OK & Next** or **OK & Previous** buttons will save any changes you make on this tab.

Deleting a store


To delete a store, click on the *Delete* button in the View stores window. **Note:** deletion of a store is a serious thing to do and is only possible when that store contains zero stock and there have been no transactions recorded. mSupply will check and tell you that deletion is not possible if these criteria are not met. If you can't meet these criteria and you still want to stop people using the store then you can [disable it - see above](#).



If the store is **Active** on another site, then this process will not delete the site.

Transition a customer to a virtual store

You may have a customer that is about to start using mSupply. That customer needs to become a store in mSupply. There are two ways to do this.

- The 'old' method: [Create new store and then merge with the existing customer name](#)
- The recommended  method: [Turn an existing customer into a store](#)





Whichever method is used, this is difficult to reverse. Only do this once you are sure. You have been warned!

Create new store and then merge with the existing customer name

Until version v5.02 (see below), the procedure was:

1. [Create the new store](#) with a similar name
2. Use mSupply's [Merge names](#) functionality to merge the two names into one



- You **must** choose the newly created store's Name as the "Name to keep" and the older Customer's name as the "Name to delete". However, doing this means that you will lose the original name properties. Therefore you should also take a note or a screenshot of name properties that you want to keep (e.g. address, categories etc.) and then re-apply them to the new store name.
- mSupply may prevent the merge due to unfinalised CIs from other stores in the system. You will need to finalise these CIs on the corresponding stores before the merge is successful.
- These can be hard to find on a multi-store system where the transactions could have come from a number of places. Suggested approach: Use [Supervisor mode](#), view CIs, and customise the list view to show Store name.
- If these transactions are on a number of stores on remote sites with dodgy internet connections, it can take **days** to log in to the remote sites, finalise the CIs, and sync the finalised CIs back to the central server. Meanwhile, there is a danger that new transactions will be created! 
- These inconveniences are why the [Turn an existing customer into a store](#) feature was developed .

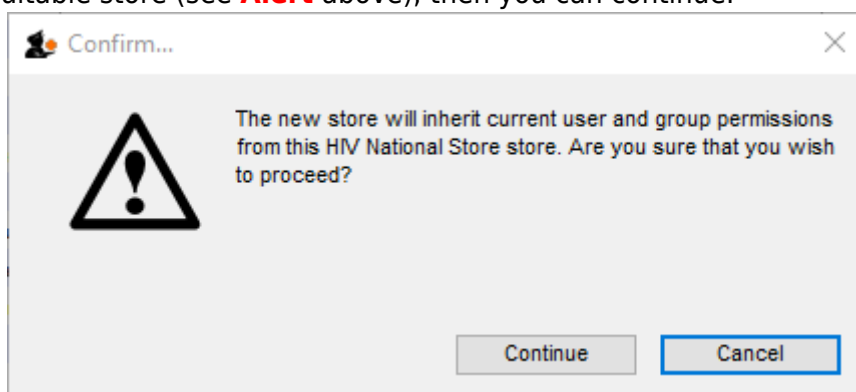
Turn an existing customer into a store

Due to the limitations of the method described above, from mSupply v5.02 onwards, you can choose to convert an existing customer into a store, and thereby retain all of its properties.



If the name is not visible to the store that you are logged in to, this method will not work! First make the name visible, then start this process...

1. Log into a store that will have the same or similar user and group permissions as the new store.
2. **Customer > Show customers...** to find the customer that you want to convert into a store and copy the Name. This will ensure that you are converting the correct name into a store - see warning below!
3. **Special > Show stores... > New Store** You will see an alert like that shown below. If you are logged in to a suitable store (see **Alert** above), then you can continue:



\\



User store login permissions are **NOT** copied to the new store. These will need to be manually configured.

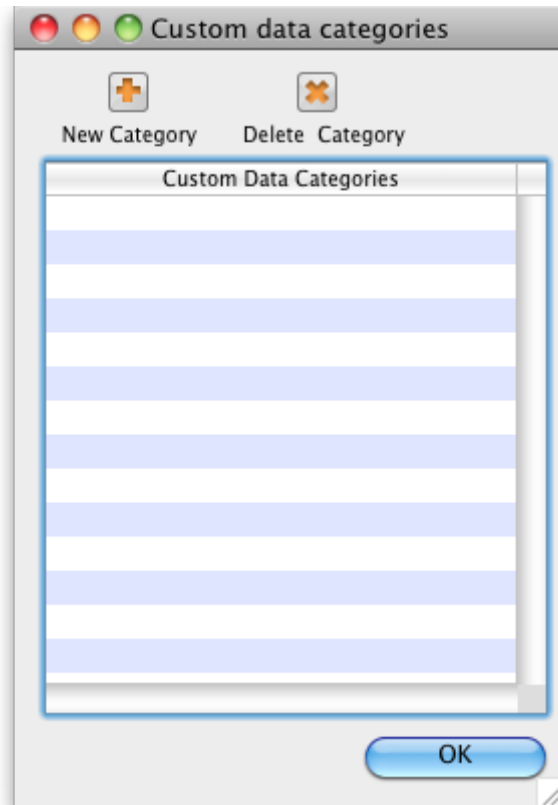
1. Click on the **Turn an existing customer into a store** checkbox
2. Enter the existing customer name into the **Name** field. You can search for existing customers by typing the first few letters of the customer's name, and then press **Tab**. To ensure that you are converting the correct name into a store, paste the Name that you copied in step 2 above. This should result in at least the store code field getting populated. If this does not happen, then the existing customer has not been recognised - try again.
3. Populate the [Responsible officer](#), [Store credentials](#) and [Tags](#) fields if required.
4. Click **OK**

Previous: [26.06. Transaction categories](#) | | Next: [26.08. Bulk Store Preferences Editor](#)

26.09. Custom data

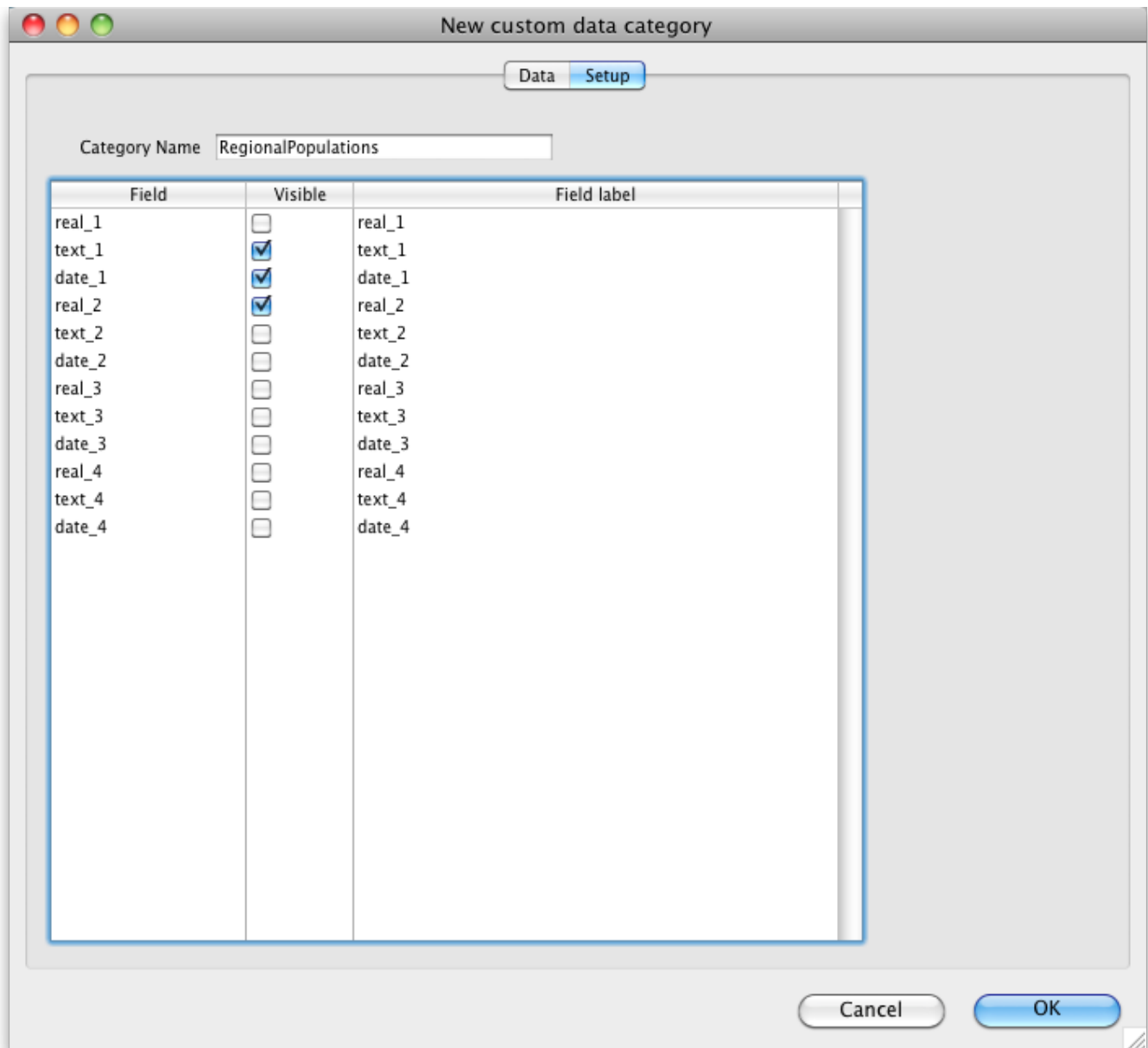
Custom data allows you to add data to mSupply that doesn't naturally fit into one of the existing fields.

- Choose **Special > Show custom data...** to show the list of custom data sets.

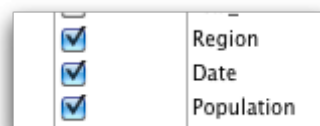


Setup fields

- Click **New**
- This window is shown:

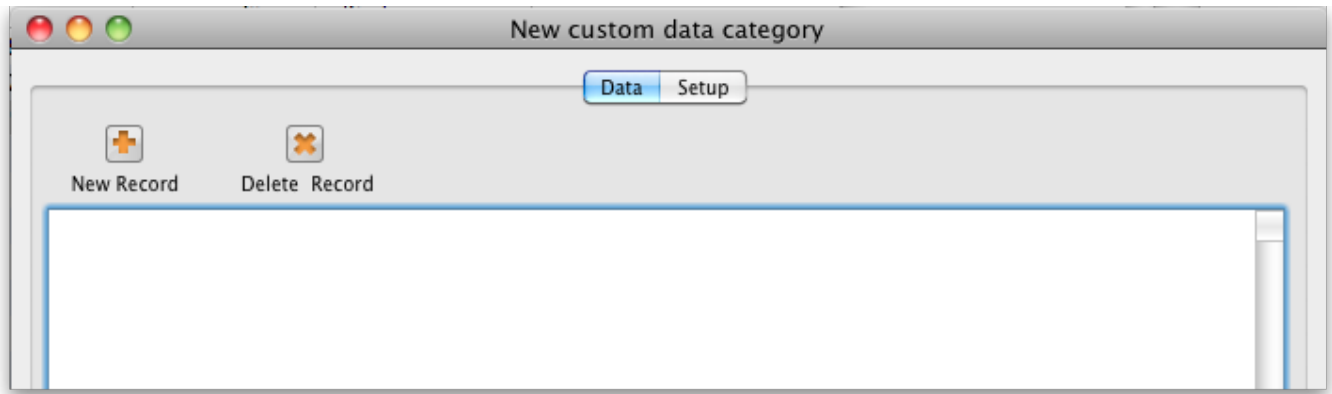


- For our example, we're going to record population in several regions each year, so we need
 - A real number field to store the population number
 - A text field to store the region name
 - A date field to store the year
- We've labelled the data set *RegionalPopulations*
- To change the field names, click once on the name, and then wait a second or two and click again- now it is editable:



Adding data

- Click the **data** tab then click **New**



Using data in reports

- You can extract data by using the following method in a pagepro report
- `custom_value_get("data_set";"field_to_query";"search_value";"field_to_return";"variable_to_return")`
 - "data_set" is the name of the data set. e.g. "RegionalPopulations"
 - field_to_query is the internal name of the field "text_1", "Text_2", "real_2", "date_7"
 - "search_value" is the value you're looking for in "field_to_query"
 - "field_to_return" is the field name of the value to return
 - "variable_to_return" is a pointer to the variable that will contain the data returned.
- Sound too complicated? We usually build these reports for clients, but this documentation is for the technically minded who want to build their own.

Previous: [26.08. Bulk Store Preferences Editor](#) | | Next: [26.10. Currencies](#)

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