

28.07. How to correct wrong pack sizes

Introduction

In a warehouse or dispensary, stock may be received in 'bulk' (larger pack sizes) which then need to be physically and logically broken down in to smaller, 'issue size', packs before the stock is issued. It often makes sense to keep last-expiring stock in bulk quantities until closer to the time it will be issued:

- It makes for easier stock-taking; just counting the number of cartons, rather than working out how many inner packs are in the cartons, and then multiplying that by the number of cartons.
- If you will be [splitting a stock line](#) to move a carton(s) to a more accessible location for issue, then keeping the 'carton' pack size makes it easier to identify how much stock needs to be split off.

In any case, whenever it is done, you will need to change the pack size of your stock.

It is important that changing pack size does **NOT** change the total amount of stock that you have. mSupply is carefully designed to ensure this.



However, if you have accidentally told mSupply that you have issued more stock than you actually have, then mSupply does allow for these to be corrected through the process described in [Changing pack size for stock already issued](#), below.

Changing pack size for stock on hand

The pack size for Stock on hand is changed through either of two methods:

- [Repack items](#)
- [Splitting a stock line](#)

Changing pack size for stock already issued

If your staff have forgotten to tell mSupply about the new pack size through a [Repack](#) or [Split](#), then stock may be issued without noticing the large pack sizes. This will result in mSupply being told that much more stock has been issued than actually has been.

In an pharmacy environment, the same could also be true if the '[Pack to one](#)' preference has not been set. Most users tend to rely on the stock being introduced to the system in the correct pack sizes

(suitable for patient consumption) and when this is not done, the dispenser doesn't pay attention to the pack sizes and accidentally tells mSupply that they are issuing stock with large pack sizes.

In both cases the customer or patient receives drug quantities that are generally much less than what mSupply has been told.

It is ***much*** better to take measures to ensure that these errors do not occur frequently, but if you find that you haven't, mSupply does have the facility to correct the pack size for stock that has already been issued. As you can imagine, this is a powerful and potentially harmful feature and so there is a special user permission to allow this. Only high level users should have the user permissions to carry out the task below.

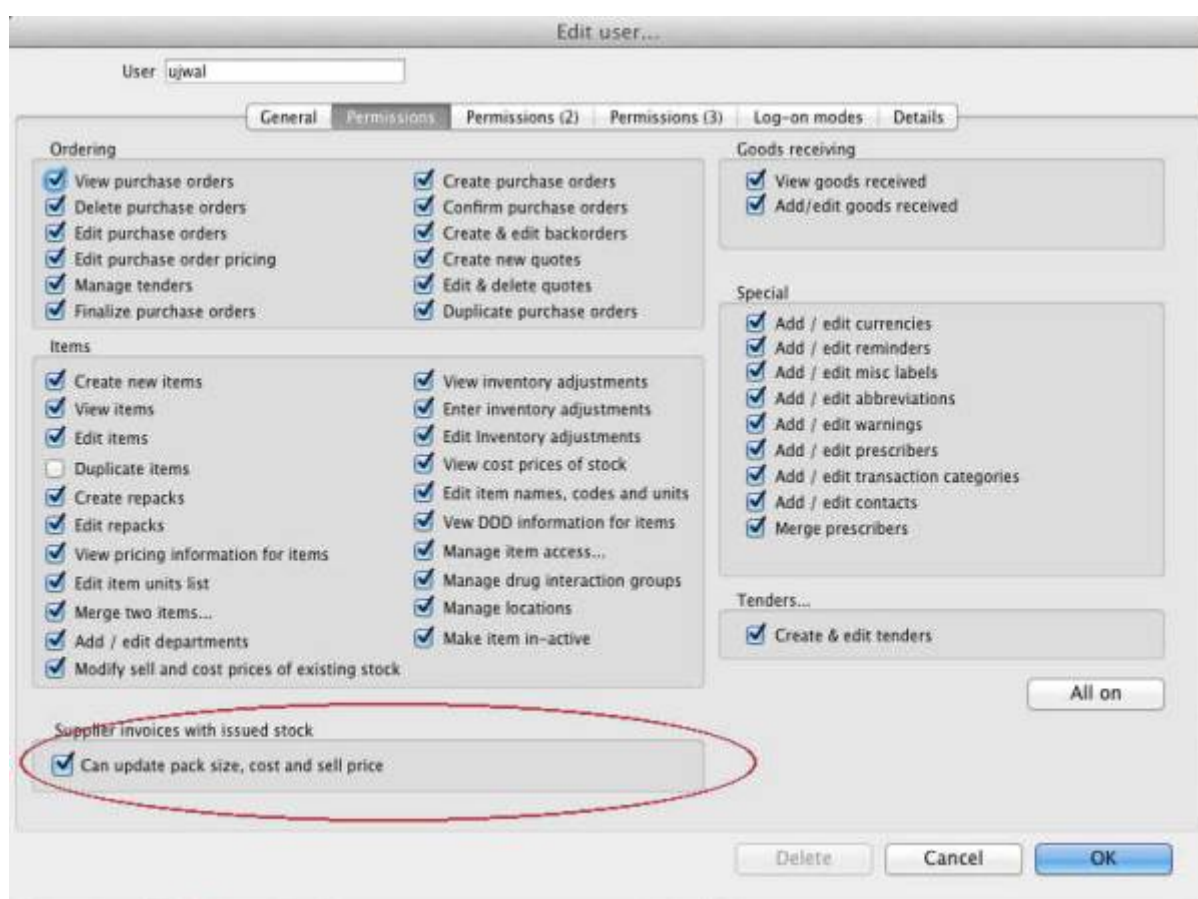
User permissions

Firstly to correct pack sizes you need to have the following user permission :

- Can update pack size, cost and sell price

Do the following :

- View File > Edit Users...
- Double click on the user that requires the right to correct pack size mistakes.
- View the "Permissions" tab
- Make sure the permission "Can update pack size, cost and sell price" is ticked (see image below)



Locating the item

For this tutorial let's assume that we are inside a pharmacy where Amoxicillin 250mg tab/cap should have been introduced as single tablets rather than boxes of 100 tablets. The pharmacy never has to dispense the whole bottle (100 tablets) to one patient.

View the item where the pack size needs to be adjusted :

- Item > Show items... from the mSupply menu. Use the search filter
- Navigate to the item in the list and double click.
- Go to the “stock” section. View the image below:

Item details...

Item name: Amoxicillin 250mg tab/cap Store: General

Show zero lines Print Split Update sell prices Show related invoices Consolidate

Line	Available	Total	Pack	Hold	Batch	Expiry date	Supplier	Manufacturer	Location	Cost Price	Sell Price	Status	Total Volume
1	3	13	100		b39399	01/01/2008	ar buck		A	343.00	343.00		0
2	100000	100000	1		b93333	31/12/2014	acmep			344.00	378.40		0

Stock

Minimum stock: 0 Total stock value: 34,404,459.00

Stock on hand: 101,300 Average unit cost: 339.62

Stock on order: 0 Total Volume: 0.00

Non stock items

Non stock item: ☐

Default customer: None

Months Cover

Based on: 0 months usage: Calculate

Exclude stock with expiry date less than: 3 months

Generating an order for: 0 days stock

will order a quantity of: 0

Delete OK & Previous OK & Next Cancel OK

The image above shows that a batch of Amoxicillin 250mg tab/cap has been received in packs of “100”.

Double click on this stock line and view the ledger associated with this batch:

Item stock line details...

Item code amo250t Item name Amoxicillin 250mg tab/cap

General **Ledger** Status Reference documents

Quantity according to stock

Total Quantity 1300 Available 300

Date	Invoice	Name	Type	In/Out	Stat	Expiry	Batch	Quan	Pack	Cost	Sell	Exten
05/02/2007	10	Arbuckle distrib	si	in	cn	01/01/2008	b39399	200	100	343	343	68600
	15	Pharmacy	ci	out	sg	01/01/2008	b39399	10	100	343	343	3430
24/05/2011	16	Blue Cross hosp	ci	out	cn	01/01/2008	b39399	100	100	343	343	34300
24/05/2011	16	Inventory adjus	sc	out	cn	01/01/2008	b39399	80	100	343	343	-27440
13/02/2012	17	Smith, John	ci	out	cn	01/01/2008	b39399	5	100	343	343	1715
13/02/2012	18	Parker, Jennie	ci	out	cn	01/01/2008	b39399	2	100	343	343	686

Item stock line ledger

Total Quantity 1300 Available 300

Reconcile from start of year

Total Quantity 1300 Available 300

Reconcile Cancel OK

The image above shows that two patients (John Smith and Jennie Parker) were issued in total 500 and 200 tablets when the correct amount should have been 5 and 2 tablets. Let's assume that the pack size on all should in fact be "1"

Now close the item stock line details window and view the item again.

Getting to the source

To correct the pack size from "100" to "1", we now need to locate the invoice that initially introduced this batch (b39399) of Amoxicillin 250mg tab/cap to our stock.

Do the following :

- Get back to the item detail window showing the batch lines.
- Select the batch line.
- Then click on the "Show related invoices" icon
- You will now be presented with a list of invoices connected to this particular batch of stock.



Locating the stock introducing invoice

From the list of invoices we now need to view the invoice that initially introduced the stock.

The image below contains customer and patient invoices (“ci” type), an inventory adjustment (“sc” type) and a supplier invoice (“si” type). The supplier invoice has been highlighted.

Double click on the line for the supplier invoice to open it.



Viewing the invoice

View the invoice and you will see one or more lines showing items that have been introduced to stock.

Among them will be one containing the item you're interested in - make sure you identify the right one because there could be more than one batch of that particular item. For this example the invoice only contains one line. This invoice line was responsible for introducing an unsuitable pack size for dispensing purposes.

Double click on the line to open up the supplier invoice line:

Supplier Invoice

Name: Arbuckle distribution Entry date: 05/02/2007 Colour: Black

Their ref: b933 arbuck Confirm date: 05/02/2007 Invoice number: 10

Comment: Short Expiry Status: cn

Category: None Goods receive ID: 0

Purchase Order ID: 0

Entered by: ujwal

Store: General

New line Delete line

Li...	Loc...	Item Name	Qty	Pack	Batch	Expiry	Cost Price	Sell Price	Price extension
1	A	Amoxicillin 250mg tab/cap	200	100	b39399	01/01/2008	343.00	343.00	68,600.00

Other charges

Item(s):

Amount: 0.00

Subtotal: 68,600.00

13 % tax: 8,918.00

Total: 77,518.00

☐ Hold Export batch: 0

☐ Finalize Margin: 0.00

OK & Next Delete OK

Correcting pack size

You should now see a window similar to the image below :

Add/edit supplier invoice line...

Item: Amoxicillin 250mg tab/cap		amo250t		New item	
Quantity:	<input type="text" value="200"/>	Units issued:	197		
Pack size:	<input type="text" value="100"/>	ea			
Total quantity:	20000		Location:	<input type="text" value="A"/>	
Batch:	<input type="text" value="b39399"/>	Volume per pack:	<input type="text" value="0"/>	m3	
Expiry:	<input type="text" value="01/01/2008"/>	Adjusted local cost (USD):	% Margin:	Sell price:	
Invoice line unit cost (USD):	<input type="text" value="343.00"/>	<input type="text" value="343.00"/>	<input type="text" value="0.00"/>	<input type="text" value="343.00"/>	

 Pack to one

For this example let's assume that the total quantities are correct. Here we did indeed receive 20,000 tablets. So we are going to make the following adjustments.



The step below is only possible if you have the user permission "Can update pack size, cost and sell price" set as described above. If this permission is not set, the pack size is disabled but still viewable.

Starting with mSupply v4.12.06 the pack size field is only enabled if there are no pending repacks connected to the stock. If suggested repacks are encountered, they either need to be deleted or finalised.

Below we have changed the packsize to "1" and pushed the quantity to 20,000

So, as before, the total tablets we have received is : $20,000 \times 1 = 20,000$

Click "OK" to save the changes.

Add/edit supplier invoice line...

Item Amoxicillin 250mg tab/cap

amo250t

New item

Quantity 20000

Units issued: 197

Pack size 1 ea

Total quantity: 20000

Location A

Batch b39399

Volume per pack 0 m3

Expiry 01/01/2008

Adjusted local cost (USD) 343.00

% Margin 0.00

Sell price 343.00

Invoice line unit cost (USD) 343.00

Pack to one

Cancel

OK

OK & Next

We are done. Close the invoice.

Review of the changes

Now, to see the result of the pack size adjustment, view the item and its ledger associated with batch “b39399”:

Item details...

General

Misc

Usage

Stock

Ledger

Quotes

Backorders

Notes

Reconcile

Bill of materials

Purchase Orders

Order options

Dispensing

Reporting

Log

CST

Stores

Item name: Amoxicillin 250mg tab/cap

Store: General

Show zero lines

Print

Split

Update sell prices

Show related invoices

Consolidate

Line	Available	Total	Pack	Hold	Batch	Expiry	Supplier	Manufacturer	Location	Cost Price	Sell Price	Status	Total Volume
1	19803	19813	1		b39399	01/01/2008	arbucks		A	343.00	343.00		0
2	100000	100000	1		b93333	31/12/2014	acmec			344.00	378.40		0

Stock

Minimum stock 0

Stock on hand 101,300

Stock on order 0

Total stock value 41,110

Average unit cost

Total Volume

Months Cover

Based on 0 months usage

For stock on hand 0

Including stock on order 0

Calculate

Delete

Item stock line details...

Item code amo250t

Item name Amoxicillin 250mg tab/cap

General

Ledger

Status

Reference documents

Quantity according to stock

Total Quantity 19813

Available 19803

Date	Invoice	Name	Type	In/Out	Stat	Expiry	Batch	Quan	Pack	Cost	Sell	Exten
05/02/2007	10	Arbuckle distrib	si	in	cn	01/01/2008	b39399	20000	1	343	343	6860000
	15	Pharmacy	ci	out	sg	01/01/2008	b39399	10	1	343	343	3430
24/05/2011	16	Blue Cross hosp	ci	out	cn	01/01/2008	b39399	100	1	343	343	34300
24/05/2011	16	Inventory adju	sc	out	cn	01/01/2008	b39399	80	1	343	343	-27440
13/02/2012	17	Smith, John	ci	out	cn	01/01/2008	b39399	5	1	343	343	1715
13/02/2012	18	Parker, Jennie	ci	out	cn	01/01/2008	b39399	2	1	343	343	686

Item stock line ledger

Total Quantity 19813

Available 19803

Reconcile from start of year

Total Quantity 19813

Available 19803

Reconcile

Cancel

OK

From the image above we see that the available and total stock figures have changed.

We can also see that pack sizes on past ledgers have been converted from “100” to “1”.

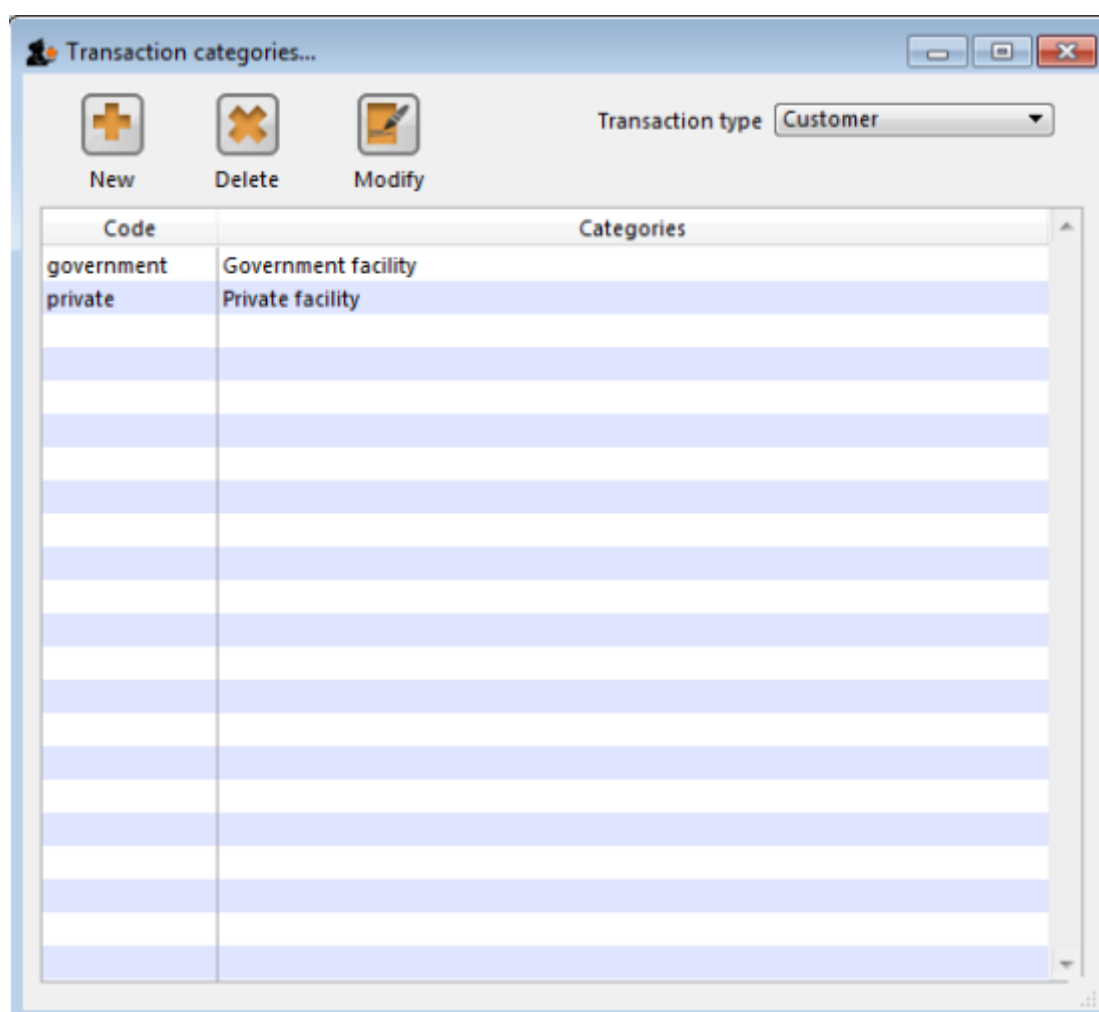
Previous: [28.06. Why is my stock on hold?](#) | Next: [28.08. How to report by invoice category](#)

28.08. How to report by invoice category

Within mSupply if you have categorised invoices (or transactions) in a particular manner then you will be able to run reports based on this category. In dispensary mode Prescriptions can also be categorised. For example you may be required to tag your customer invoices as “Government” or “Private” facilities.

Follow these steps to generate a report by invoice category :-

- Make sure there is at least one transaction category available in your data file. If not, then follow the instructions at [26.06. Transaction categories](#) to create a transaction category.



For this example the image above shows the addition of two categories for customer invoices.

- On your Invoices window, all of your categories will be displayed under the “Category” drop-down list.

Customer invoice

Name: Confirm date: Colour:

Their ref: Invoice: 510

Comment: Entry date: 09/04/2012

Category: Goods receive ID: 0

Status: nw

Entered by: sussol

Store: General

New line Delete line(s) Backorders History Confirm

General Summary by Item Summary by Batch Transport details

...	L...	Location	Item Name	Quan	Pack Size	Batch	Exp date	Sell Price	Price exten
1	C 21		Abacavir sulfate (AB-C) 300mg, Tabs	10	60	1082375	01/10/201	14.49	144.90
2	H13		Dapsone 120mg, Oral 120mg tabs,	1	100	144	11/01/201	9.32	9.32
3	Expire Roo		Giemsa's Solution, 500ml/bottle	10	1	V0810026	01/09/201	4.00	40.00

Other charges Item: Amount: 0.00

Subtotal: 194.22

0 % tax: 0.00

Total: 194.22

☐ Hold ☐ Finalize Export batch: 0

OK & Next Delete OK

- Choose the category from the list and click on the OK button. For reporting purposes, the invoice will need to be confirmed.
- For reporting, from mSupply menu or Navigator , View Report → Transactions.

Transaction report...

Type of report

Report

- Each invoice grouped by name
- Each invoice grouped by date
- Each invoice line by item
- Each invoice showing profit
- Each invoice line grouped by item department then item
- Each invoice line grouped by name
- Totals for each item category
- Totals for each item
- Totals for each item-Net Inventory Adjustment
- Totals for each name
- Totals for each item broken down by name
- Totals for each name broken down by item
- Totals for each item department
- Totals for each item grouped by day
- Totals for each item grouped by month

Date range

☒ Confirmed Date ☐ Shipping Date

From: 09/04/2012 To: 09/04/2012 Today

Donated by: equals

Which mode?

☒ Both modes ☐ Store mode ☐ Dispensary mode

☒ Exclude transfers from calculations

☒ Exclude Ad hoc and non stock items

☒ Exclude hidden items

Transaction type

☒ Sales to customers

☐ Sales to and credits from customers

☐ Purchases from suppliers

☐ Purchases from and credits to suppliers

☐ Inventory adjustment - Add stock

☐ Inventory adjustment - Reduce stock

☐ Inventory adjustment - Net movement

Transaction filter

Code contains govern

Name filter

Name code equals

and Category Don't care

Prescriber filter

Code equals

Item filter...

Item code equals

and category is Don't Care

and department is Don't care

☐ Open report in Excel

Cancel OK

- On the right hand side of that window, you will see the section “Transaction filter”. Here we have chosen to search for “Code” *contains* “govern”, which produces the same results as searching for “Code” *equals* “Government”.
- Click on the OK button and you will now have the opportunity to view items issued to government facilities.

Print Preview

Sales, Confirm date : 09/04/2012 to 09/04/2012, Store : General Mode: Both Transaction category : Code contains @govern@.

Item	To/From	Code	Date	Invoice	#Packs	Pack Size	Total Quant	Cost Price	Sell Price	Price Extension
Axcelin sulfate (ABC) 300mg Tabs	Axcelin 100 Health post	810	09/04/12	810	10.00	80.00	800	14.40	14.40	144.00
										Total: 144.00
Caprine 100mg, Oral 100mg tabs	Axcelin 100 Health post	810	09/04/12	810	1.00	100.00	100	9.30	9.30	9.30
										Total: 9.30
Gemmax solution 800mg code	Axcelin 100 Health post	810	09/04/12	810	10.00	1.00	10	8.00	8.00	80.00
										Total: 80.00
Grand Total										194.30

Previous: [28.07. How to correct wrong pack sizes](#) | | Next: [28.09. Imprest work flow](#)

28.09. Imprest work flow

Version : v3.11 or v3.12 or later

The imprest module allows a pharmacy or warehouse to decide on quantities of drugs its receiver facilities (customers or [Virtual stores](#)) should receive. Periodically a stock take is carried out at the customer's site and drugs are replenished to meet the predefined (imprest) level.

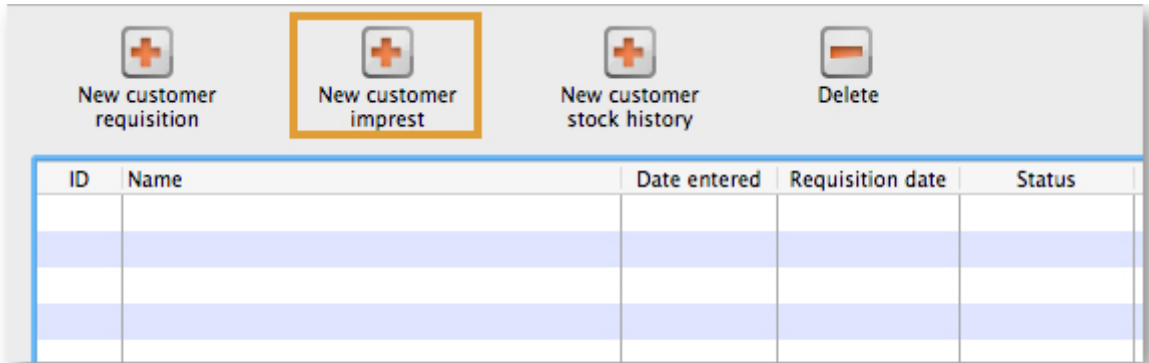
The tutorial below suggest how an imprest should now be carried out.

We will assume that the facility or customer has been assigned with a suitable imprest list. If this is not the case then please do the following:

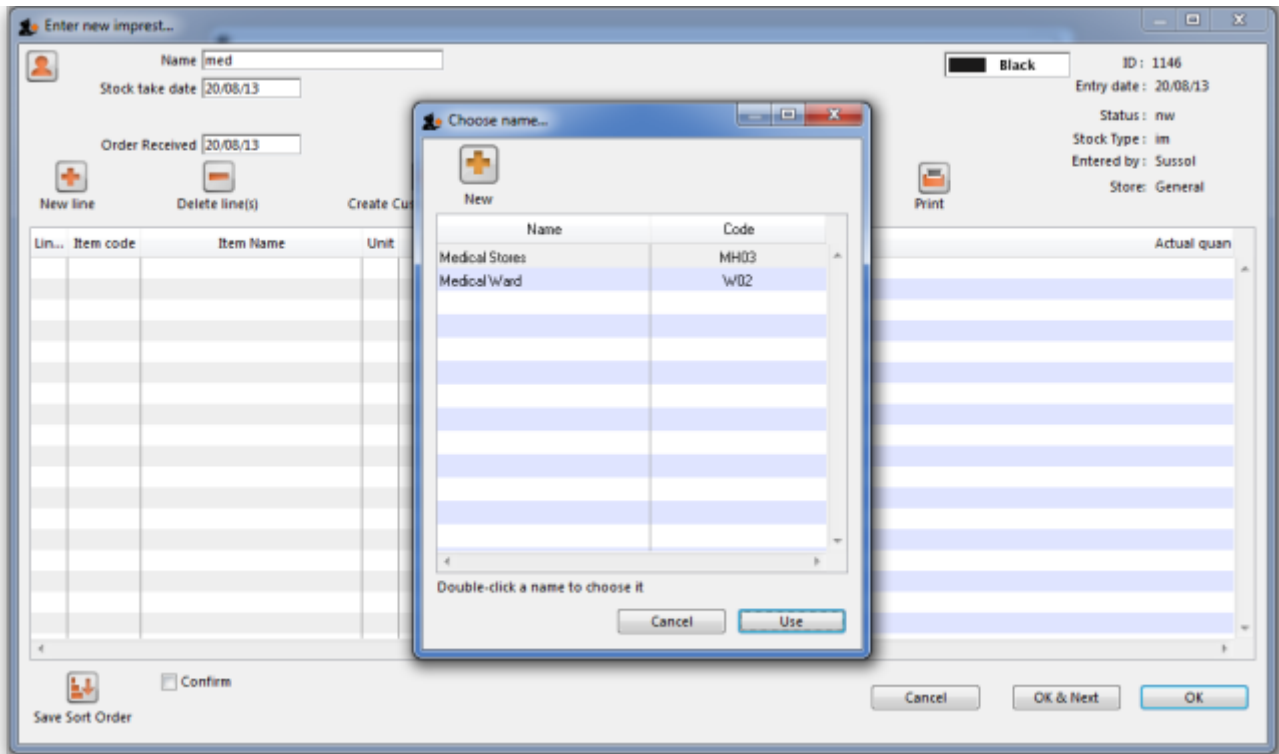
- Select Item > Show Item master list... from the menus to create a master list (see [here](#) for details).
- Assign the master list to the customer. See [Item Lists > Assigning a list to a customer](#) for instructions.

Create an imprest

Click on 'Requisitions' in the 'Customer' (or Patients) tab.. Click on the *New customer imprest* icon in the window which appears.



Type the first few characters of the customer name in the Name field and press tab. A list of matching customers is displayed (unless only one customer name matches what you entered). Choose the intended customer and click the *Use* button.




At this point the master list of items associated with the customer is displayed in its default sort order.

Print the imprest

The image below shows an example of what you now see: a list of items with their required imprest quantities. The next task is to print the list and carry out a physical stock take at the customer site.

First of all, make sure the list is in the correct order. If it is, fine. If not, re-order it as appropriate (by clicking on the column headers or dragging items up or down the list) and click on the *Save Sort Order* button.



Now print the list by clicking on the *Print* button  and selecting the “Customer stock takes” option.

The print dialogue opens. Here you can add header and footer information for your printouts. Press OK when ready and print the list.

Header

Customer stock take for :Amnesty Hospital date : 20/

Footer

Destination

☒ Printer ☐ Preview on screen before printing

☐ Open in Excel

☐ Save as HTML file

☐ Save as Text file

Choose report type

Report name : customer_stock_takes

Cancel OK

[illegible]

Please note that after printing the list you should not re-order it - it will be confusing later when you

come to enter the counted quantities for each item.

Now, using the printout, carry out the actual stock take.

Updating the stock quantities

After carrying out actual stock take at the customer's site it's time to enter the actual stock quantities. In the window displayed below, edit the value in the *Customer current stock on hand* column with the stock take quantities you've written on the print out for each item.

mSupply automatically completes other two columns (*Our suggested quantity* and *Actual quantity given*).

Imprest formula:



- Our suggested quantity = Maximum of
 - 0, and
 - Imprest quantity - Customer current stock on hand

Name: AMN Their ref: Black ID: 9

Order Received: Comment: Entry date: 20/03/18

Stock take date: Status: sg

Type: lm Entered by: Admin

Store: General Warehouse

Line...	Item code	Item name	Unit	Our stock on hand	Their previous stock on hand	Imprest...	Customer current stock on hand	Our suggested quantity	Actual quantity given	Comment
1	030453	Amoxicillin 250mg tabs	Tab	2457600	0	5	4	1	5	
2	038423	Salbutamol scored 2mg tabs	Tab	35000	0	4	4	0	4	
3	042744	Diazepam Injecti...mg/ml Amp/2ml	A...le	1675	0	4	4	0	4	
4	850804	Oral Rehydration...1 litre/ CAR-100	Sa...et	16000	0	5	3	2	5	
5	030062	Acetylsalicylic Acid 300mg tabs	Tablet	7000	0	3	3	0	3	
6	201116	Bandage W.O.W....m wide x 5m roll	Roll	4560	0	2	3	0	2	
7	031661	Captopril scored 25mg tabs	Tablet	50000	0	4	4	0	4	
8	037020	Paracetamol 500mg tabs	Tablet	129000	0	6	6	0	6	

☐ Confirm

Assigning stock

Once the updating of stock quantities is done and you are satisfied, you can click the *Create customer*

invoice button to assign stock to the customer. Clicking the button will open the following window:

Name: Amnesty Hospital
 Their ref: AMN
 Comment: Invoice from requisition
 Confirm date: 00/00/00
 Category: None
 Colour: Black
 Invoice: 21
 Entry date: 20/03/18
 Goods received ID: 0
 Status: sg
 Entered by: Admin
 Store: General Warehouse

New line, Delete line(s), History, Confirm

General, Summary by Item, Summary by Batch, Transport details, Log

L...	Location	Item Name	Quan	Pack Size	Batch	Exp date	Sell Price	Price exten
1		Amoxicillin 250mg tabs	5	1	none		0.00	0.00
2		Salbutamol scored 2mg tabs	4	1	none		0.00	0.00
3		Diazepam Injection 5mg/ml Amp/2ml	4	1	none		0.00	0.00
4		Oral Rehydration Solut...t for 1 litre/ CAR-100	5	1	none		0.00	0.00
5		Acetylsalicylic Acid 300mg tabs	3	1	none		0.00	0.00
6		Bandage W.O.W. 15cm wide x 5m roll	2	1	none		0.00	0.00
7		Captopril scored 25mg tabs	4	1	none		0.00	0.00
8		Paracetamol 500mg tabs	6	1	none		0.00	0.00

Other charges, Item: , Amount: 0.00, Subtotal: 0.00, 0 % tax: 0.00, Total: 0.00

☒ Hold, ☐ Finalise, Export batch: 0, OK & Next, Delete, OK

All the entries appear in red - they are **placeholder** lines which have the correct quantity but have no batch chosen (notice 'none' in the batch column for each line). You have to double-click each line in turn and select which batches you wish to assign to the customer.

As an example, you will see the window below when you double click an item line:

Item: Amoxicillin 250mg tabs, Line: 1, Quan: 5 of 0, Total: 5, Pack: 1 Tablet, Bulk/Outer pack size: 0

Add Place holder, Re-distribute all, Re-lookup Sell Price

L...	Issue	Available	Tot in st...	Pack	H...	Batch	Expdate	Supplier	Location	Cost Price	Sell price	Status
1	5	0	0	1		none				0.00	0.00	
2	0	21,595	2397,595	1000				invad	B1	0.00	0.00	
3	0	14	20	500		17KD003	9/12/17		B1	0.01	0.01	
4	0	0	50	1000		K568672	9/12/17		B1	0.03	0.03	

Total quantity issued: 5, Total quantity available: 2204595, Cancel, OK, OK & Next

Normally you would click on the *Re-distribute all* button to have mSupply make the appropriate selection for you (it chooses batches with shortest expiry first). Having done that, the window now appears like this:

Item: Amoxicillin 250mg tabs 030453

Line: 2

Quan: 1 of 2197.59 Total: 1000

Pack: 1000 Tablet Bulk/Outer pack size: 0

L...	Issue	Available	Tot in st...	Pack	H...	Batch	Expdate	Supplier	Location	Cost Price	Sell price	Status
1	0	0	0	1	<input type="checkbox"/>	none				0.00	0.00	
2	1	21...595	2397.595	1000	<input type="checkbox"/>			invad	B1	0.00	0.00	
3	0	14	20	500	<input type="checkbox"/>	17KD003	9/12/17		B1	0.01	0.01	
4	0	0	50	1000	<input type="checkbox"/>	K568672	9/12/17		B1	0.03	0.03	

Total quantity issued: 1000
Total quantity available: 2204595

Clicking on *OK & Next* displays the next item on the invoice. When the final item has been processed, clicking on *OK* or *OK & Next* will display the complete invoice (all red lines replaced with black lines with the chosen batch displayed). The image below shows the invoice part way through this process:

When you've selected batches for every line, make sure the *Hold* checkbox is not checked then confirm the invoice to assign the stock to the customer. Now all you have to do is print off the pick list, physically pick the stock off the shelves and send it to the customer. Congratulations - job done!

Previous: [28.08. How to report by invoice category](#) | Next: [28.10. Tips and tricks](#)

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