# 26.12. Product (drug) registration

# Introduction

The process by which a governing authority controls which products can be supplied in a country is called registration. The process involves keeping a register of the products that are allowed to be supplied by particular suppliers. Each supplier must:

- Obtain a supplier registration number and
- Obtain a registration for each product they wish to supply. This registration will usually be per brand and dose form, will be time-bound and therefore will need renewal.

A critical part of the process is supplying documents to verify product quality. The Product (drug) registration functionality in mSupply is all about recording and tracking the status of suppliers' registrations and storing the documentation for easy retrieval.

# Getting started with the Registration module

# Activate the Registration module

Before using the Registration module you will need to activate it in the Drug registration tab of the General Preferences.

#### Making the Registration module visible

mSupply treats the Registration module like a store (see Virtual stores). A user won't be able to log in to a virtual store on the login window unless they have permission to do so (see Managing users. You will need to allow the users who are going to do the registration work to see the Registration Module 'store'.

#### Making things visible in the Registration module 'store'

When a new store is created, no existing items or names (suppliers, manufacturers, customers, etc.) are visible in it. This clearly needs to be fixed if you are going to register existing items, suppliers, or manufacturers!



Any items, suppliers and manufacturers created after the Registration module 'store' has been created will be automatically made visible in the Registration module 'store'.

#### Make existing suppliers and manufacturers visible

To make existing suppliers and manufacturers visible, you need to make them visible in the Registration module 'store' - refer Names: Using, adding and editing, the Store tab.

#### Make existing items visible

To make existing suppliers and manufacturers visible, you need to make them visible in the Registration module 'store' - refer Items, the Stores tab. This must be done while logged in to another store.

# Using the Registration module

The Registration module has its own Navigator. If mSupply doesn't start in Registration mode when you log in you may switch to it by choosing *File > Switch...* and selecting Registration:

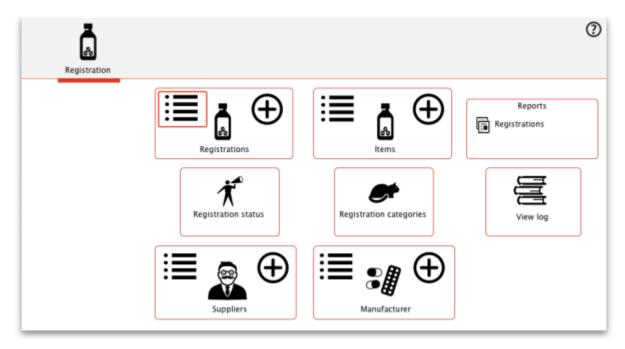
1.	Log-in – 🗆 🗙
Search users	_
~	Quit OK
	11.

You will then be presented with the Navigator for Registration:



#### Show (list) registrations

To see a list of registrations click on the List button:



This will open the filter window to allow you to refine your search. The filters all work in the normal way so, if you want to list all registrations, do not enter anything in the filters:

	Show registration	S
Find Registrations whose		
Expiry date ᅌ	is on or b ᅌ	
and		
Supplier Name	starts with ᅌ	
and		
Item code 📀	starts with ᅌ	
and ᅌ	VEN Category	Don't Care
and ᅌ	category 1 is	Don't Care
and 🖸	category 2 is	Don't Care
and ᅌ	category 3 is	
and ᅌ	category 4 is	
and ᅌ	Status is	Don't Care
	Cance	Find

Clicking the Find button will display a list of all the registrations that match your search criteria:

÷ =	٩,	Filter list as:	tem name 🛛 🗸	ltem name	1	D	
New Delete	Find						25/25
Item Name	Supplier	Status	Application number	Registration number	Trade name	ls registered	Registration expiry
est_item	Test Drug Reg		1	1	guardian		/
o-trimoxazole [Septrin] 40mg/	Academy Chemic		6	6	Test trimoxazole		3/5
BC 300mg, tablet	Access Spectrum		3	3	Natural ABC		12/1
endona 10kg	Hetero Labs Limi		4	4	Hetero Fendona		
evofloxacin, 1g	Alere Medical Co		5	5	Alere Levofloxacin		
Diclofenac sodium 50mg, tablet	FIND		7	7	DH Diclofenac		
artesunate injection 60 mg	Nanova Co.Ltd		8	8	Artesunate		
sall bearing for plug fan motor	<b>Drug Registration</b>		9	9	Ball AHF		4/5
IMCP Future item 2	Waimaw Townsh		10	10	Manufacturer		12/2
efixime 100mg, tablet	Indaw township	Refused	11	11	fireg		
tack with lid for 1-2ml Cryo vial	<b>Drug Registration</b>		12	12			
ab requsition form	Lanmadaw Town		13	13	labreg		
880TT EID m2000 Reagent Kit	Htilin Township		14	14			7/2
fand Compression Sprayer Ca	Bago MMA	Waiting for docume	15	15	higy		4/3
Vater for injection 5ml, bottle	Indaw Township		16	16	jubilee		
liprenium	Zegong Township		17	17	asd		
liprenium	Zabbuthiri Town		18	18	jsd		
Quinine DHCL, Inj 300mg/ml,2ml	Waw Township		19	19	gdfdg		
aboratory Coat, Medium	Tabayin Township		20	20	ddfgfd		
Vater for injection 5ml, bottle	Waibargi Towns		21	21			
Gene Xpert Machine (4 modules)	JICA		22	22			
BC 300mg, tablet	Alere Medical Co		23	23			
lectronic Pipette Boy	Access Spectrum		24	24			

#### New

This will allow you to enter new registrations. See the section New Registration.

#### Delete

You may remove registrations by highlighting an item on this list and clicking the delete button.

ows you to refine your search without having to go back	to the prev	vious window
edit registration		
-	the list and	d it will bring
Le Drug registration details		
Item Name Acetylcysteine Injection, 200mg/ml, 10ml	Application date listration number Reg. expiry date Category 1 Category 2 Category 3 Category 4	2017-02-05 8 00-00-00 None None
Document Log Add Remove Document name		Refused ste uploaded
	edit registration and edit the details of a registration, double click it in you can view and edit the details:	and edit the details of a registration, double click it in the list and you can view and edit the details: Drug registration details Supplier KERIPIA SC Registration number Remove Manufacturer KERIPIA SC Trade name AcetySuper Pack Size Comment test Comment test Approval date 00-00-00 Category 3 Status Status Status Supplier Log Status Status Supplier Log Status Supplier Log Supplier Log Status Supplier Log Status Supplier Log Supplier Log Status Supplier Log Status Supplier Log Supplier Log Status Supplier Log Supplier Log Status Supplier Log Sta

# **New registration**



Cancel

OK

Ŵ

To enter a new drug registration record, click on

This will open the following window where data can be entered in fields as described below:

#### Find

This a

#### View

To vie up a window where

OK & Next

×

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termination		<b>×</b>
	Application number	0
Item Name	Application date	00-00-00
	Registration number	
Manufacturer	Reg. expiry date	00-00-00
Trade name	Category 1	None v
Pack Size	Category 2	None 🖂
Comment	Category 3	
Currently registered Approval date 00-00-00	Category 4	
	Status	None 🗸 🗸
Document Log		
• <b>•</b>		
Add Remove		
Document name	Da	ate uploaded
		<u>^</u>
		×
OK & Next	Cancel	ок 🛛 🗳

#### Supplier

- To get a list of suppliers starting with a particular letter, enter the letter and press **Tab**. This will let you select the supplier from a list.
- If you enter a letter and there is only one supplier beginning with that letter it will automatically be entered into the Supplier field.
- If the supplier is not listed you may need to create a new supplier record by clicking on the New Supplier button.
- If you want to list all suppliers you can enter @ and click Find.
- For more details see the New Suppler section below.
- Once you have chosen a supplier you will be able to edit the supplier details by clicking on the Edit Supplier button.

#### Item name

Enter the first letter of the item, press **Tab**, and select the item from the list that displays.

#### Manufacturer

As above enter the first letter of the manufacturer, press Tab, and select from the displayed list. If the manufacturer is not displayed a new record for the manufacturer will need to be created by clicking on the New Manufacturer button.

#### Trade name

As trade names for drugs vary widely this is a field to fill out manually.

#### **Currently registered**

If this item has been approved for registration then tick this box. The approval date will change to today's date once the window has been closed.

#### Status

You can assign a drug registration a status you have previously defined in the Drug Registration status window

#### **Documents**

You may attach documents to the registration record by clicking the plus button. This will open a window to allow you to navigate to and choose a locally stored document. To view documents stored in this way simply double click the document listed below.

#### Logs

The log tab allows you to see a list of events such as when this item was approved.

#### Show (list) suppliers

#### See Show Suppliers



#### New supplier

#### See Names: using, adding and editing

≣	Ş	$\oplus$
	Suppliers	

#### Show / new manufacturers

The process for viewing or adding a new manufacturer is the same as the process for viewing/adding a supplier - refer to the instructions above.

#### Reports

Reports	
Drug registrations	

Clicking on Registrations will open a report listing all of your registration records.

#### **Registration categories**

Item categories are a great way of grouping your items. This enables you, for example, to report on specific groups of products by filtering by category. This can be extremely helpful.



To create a new category click on the Cat. This will open this window:

Drug registration category	• ×
Show Category 1	
New Delete	
Drug registration catego	ory
Anti-analgesic	^
anti-inflamatory Hair Growths	
	ai.

#### View registrations in category

 To view a list of registrations assigned to each category **double click** on the category in the list.

#### New

• Click the **New** button to add a new category.

#### Delete

• Click the **Delete** button to remove a category.



If there are registrations assigned to a category, then mSupply will not let you delete the category until you have removed the category from the *drug registration records*. mSupply will open the category so that you can see the Registration records that are assigned to this category.

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فا	Drug registration cate	egory	_ 🗆 🖊
Drug registration categ	ory Subsidised Pharmacy Only		
Registrations which bel	ong to this category		Delete
Supplier	Item Name	Trade name	Expiry date
Oxydan	Abacavir 300mg tabs	Fergitol	A
Oxydan	Abacavir 300mg tabs	mal de genou	
Test Supplier	Abacavir 300mg tabs		
Oxydan	Wax Embedding Pack/10kg	mal de pied	
Test Supplier	Zinc Phosphate Cement (Elite Cement) P	. mal de dos	
<	1	1	>

#### Drug registration status window

In this window you can define for yourself the different states or phases of a Drug Registration (for example, In Process, Refused, Waiting for documents, etc). This means that the status of a registration can be seen at a glance.



To show, create or delete a status click on the above button in the Navigator.

套 Drug registration status	—	×
New Delete		
Status		
Refused Waiting for documents		^
		<u>,</u>

#### Edit a status

To edit a status, double-click on it. You can change its name or identifying color. The drug registrations that have been assigned this status will be affected by the change.

🖢 Drug registration status —		$\times$
Description Waiting for documents Colour Green		
OK & Next Cancel	OK	_

#### Add a new status

\* Click the **New** button to add a new status.

#### Delete a status

\* Click the **Delete** button to remove a status.



If this status has been assigned to registrations, then mSupply will not let you delete the status until you have removed the status from the *drug registration records*. mSupply will tell you how many drug registrations have been assigned this status.

Previous: 26.11. Using foreign currencies in transactions | | Next: 26.13. Using the mSupply remote client

# 5.01. Names: using, adding and editing

# About names

In mSupply a "name" is one of these:

- customer: a recipient of your goods
- supplier: someone who sends your store goods
- manufacturer: someone who makes the goods that you receive, store and distribute
- donor: an entity that donates goods to you (you can track donated stock)
- patient: someone you dispense goods to
- others: you'll find other types e.g. benchmarks mentioned through out the documentation

A name can also be more than one (or all!) of these at the same time.

# Adding a customer, supplier, manufacturer, donor or benchmark

#### Adding a new customer



In a multi-store system, you will quite likely not want the new customer to be visible to every store. By default, mSupply will make a new customer visible only to the store that you are logged in to when you create the customer. This store will be made the Supplying store. Make sure that you are logged in to the supplying store before proceeding.

- Log in to the supplying store
- Choose *Customer* > *new customer* from the menu.
- The form shown below will come up.
- The customer checkbox will be checked and disabled (from editing).

	Name Code Charge to Name Type Facility HSH name	5	Contact email web site Phone Fax Status Hold	Price Category	Store: General  Currency USD  Customer details Supplying store General Printing Print invoices alphabetically
	Category O Customer Supplier Manufacturer Benchmark Main/Billing Address Address 1 Address 2 Address 3 Address 4 Address 5 Post code Country	her Category 1 None Category 2 None Category 3 None Category 4 None	Category Cat	6 None 🕤 n None 🕤	Custom 1 Custom 2 Custom 3 Comment Shipping address
ete name				OK & Nex	d Cancel OK

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Names can also be mSupply stores - refer Virtual stores. Customers that are *not* stores are **Facilities** - refer to the Name type, just under the **Name** in the screen-shot above.

#### Adding a new supplier

- To add a new supplier, choose Supplier > New supplier from the menu (makes sense really!)
- The window will look the same as for adding a customer, except the supplier checkbox will be checked and disabled (from editing).

#### Adding a new manufacturer

- To add a new manufacturer, choose *Supplier > New manufacturer* from the menu.
- The window will look the same as for adding a customer, except the manufacturer checkbox will be checked and disabled (from editing).

## Adding a new donor or benchmark

- Select *Customer* > *New customer* or *Supplier* > *New supplier* from the menu.
- The same window for adding a new customer or supplier will open and you should check the *Donor* or *Benchmark* checkbox in the Category section.

## Fields in the names entry window

#### Name Code

The unique code to identify this customer, supplier or manufacturer.

#### Charge to

mSupply is made to work in tandem with an accounting program (although it will also function just fine by itself). The "Charge to" code is what is exported with each invoice. Generally you should make the charge code and name code the same (If you want, there is an option in the Preferences > Misc tab to make sure this is the case). For example:

If you have 3 hospitals you supply, but you send the bills to one centre for payment, you may
want to enter each hospital with its own name code, and all of them with the same charge code.
In your accounting program you would just enter one debtor (customer) with a code the same
as the charge code. eg.

Customer	Name code	Charge code
Fred H Hosp	fhhosp	bluehos
Mary P Hosp	mphosp	bluehos
Sam Q Hosp	sqhosp	bluehos

- In your accounting program you would enter "Blue Hospitals Assoc" with the code "bluehos"
- For a supplier, if you have entered a default currency and margin these will be entered, but you can override them. Every supplier should have its currency entered (The currency it uses for your invoices). If the currency isn't yet in your system, close the name entry window and choose *Currencies* from the *Special* menu to add it.
  - if you do not wish to use different name codes and charge codes, check the "supplier name code and charge must match" and "customer name code and charge must match" check boxes in the mSupply Preferences. If you do this, the charge code will automatically be identified with the name code.
  - spaces are not allowed in name codes and charge codes

Either the "customer" or "supplier" check box will be checked as appropriate, depending on whether you have chosen "new supplier" or "new customer" from the menus to produce this window. However, you can still alter things here without upsetting mSupply.

#### Name

The customer/supplier name. (Remember you can use the *Tab* key to move from field to field)

If there are non-printable characters before or after the name, code or charge code they will be removed. Any nonprintable characters in the name, code or charge code will be replaced with an underscore (\_).

#### HSH code & HSH name

These are used when using the Health Supply Hub (replacement for the Remote tender module - see the Health Supply Hub page for details) to link suppliers or manmufacturers with their record on the Health Supply Hub server and maintained by The mSupply Foundation. If your system does not use the Health Supply Hub, then you can ignore these fields.

To link a supplier or manufacturer to one already entered in the Health Supply Hub:

- 1. set your Health Supply Hub preferences (16.01. General preferences)
- 2. click on the padlock icon next to the **HSH code field** to unlock it and enable the 🖾 button.
- 3. click on the 🖾 button.

mSupply will then search for a supplier or manufacturer (depending on whether the name is a supplier or manufacturer in mSupply) in the Health Supply Hub with a name having the same first letter. A window like this opens:

Quick search 5						
Code Supplier Name						

If the correct supplier or manufacturer is not shown in the list then clear the contents of the Quick

**search** field. All suppliers or manufacturers registered on the Health Supply Hub are then displayed. You can refine the search by typing something in the **Quick search** field and only suppliers/manufacturers with names that begin with what you typed will be displayed.

When you see the supplier/manufacturer name that you wish to connect to the supplier in mSupply, double-click on it to select it; the Health Supply Hub code of the supplier/manufacturer will be put in the **HSH code** field and the supplier/manufacturer's Health Supply Hub name will be shown in the **HSH name** field.

It the search is unsuccessful or there is a problem connecting to the Health Supply Hub, you will be shown an appropriate message.

**Note:** if the name you are trying to link to the HSH is a customer then you shown a message telling you that linking it to a supplier or manufacturer in the Health Supply Hub is not possible.

#### Туре

In the main entry screen, there are 4 check boxes to mark each entry as a customer, a supplier, a manufacturer and an additional *Benchmark* category. This last category is a feature of the Tender Management module, and is fully explained in that section, under Using Benchmark prices

#### Status - Hold checkbox

If this is checked this name is not visible to any store and can not be a supplier or customer.

#### Donor checkbox

This is applicable to suppliers only. There are a few situations in which this box should be checked:

- 1. If this supplier/organisation provides goods free of charge (either in whole or in part).
- 2. If this supplier/organisation provides funding (either in whole or in part) for purchasing.

#### Price Category

Selection of any of the categories will fix a certain price margin for that Supplier or Customer.The price category value is entered in *File >Preferences > Prices*. When goods are being issued to this customer, the selling price is increased/decreased by the percentage specified in the Preferences for this price category.

• Eg: Consider customer XYZ, who is in category B, and in the preferences category B is assigned a value of 50. If an item is issued to customer XYZ with a normal selling price of \$10, the selling price on this invoice will be \$15.

#### Address and contact details

These should be completed with relevant details

• For customers, you can enter separate delivery and billing addresses as necessary.

#### Other section

#### Categories

These category fields are used for reporting and are available for you to make whatever entries are appropriate in your situation. For example, you might wish to subdivide your Hospital category by number of beds, or your Clinics by the number of patients seen daily, etc. Or you may wish to identify your customers by their geographical location (region, district, state etc.) or by location type - urban, city centre, rural, remote, etc. The choice is yours - the main point to remember is that these fields are searchable, enabling you to produce reports relating to very specific criteria.

- There are 6 category fields available for selecting as required.
- Each category has its own drop down list containing the categories which have been defined using the menu item Supplier > Show categories... or Customer > Show categories... (see Name Categories for more details).
- The labels of these 6 categories can also be changed in the preferences (see General preferences, Names tab for details).

#### **Custom fields**

Custom fields are similar to Category fields, the main difference being that these fields are not validated using a drop-down list, and so can't be reliably used for categorisation.

#### Analysis

You can use this field to group together certain types of customers or suppliers. You can filter the report by selecting the group in the *Analysis* field.

#### **Postal address**

Here you can enter a postal address if it is different to the physical address of the supplier.

#### Supplying store

As of mSupply versions (Mobile and Desktop) released since 2019, the concept of a **Supplying store** is less relevant than it was. The feature is still active, can be utilised with custom code, and is the default store for internal orders are if this customer becomes a stoer in its own right.

## Extra information for customers only

Shipping address: If the name is a customer, shipping address fields will be shown.

# Extra information for suppliers only

**Currency:** Enter the currency code of the currency this supplier uses for invoicing you.

Margin: Enter the percentage margin to apply to items received from this supplier.

**Freight factor:** Enter the amount to add to quotations from this supplier to adjust quoted prices for freight. For example: a physical check on invoices from IDA reveals that freight to Nepal generally amounts to about 15% of the net value of the invoice. Therefore we would enter "1.15" in this field for IDA. Note that if suppliers quote you "CIF" prices, then you should enter "0" here.

#### About manufacturers

When you are receiving goods, you can optionally specify the manufacturer of each item. Manufacturers can be chosen from a list that is made up of names which have the *Manufacturer* checkbox checked.

For the manufacturer field to be shown, the option must be turned on:

- Special > Show stores > [choose your store and double-click] > Preferences tab
- Check the **Able to specify manufacturer when receiving, ordering or quoting for items** checkbox

# Editing a customer, supplier or manufacturer

#### Finding a name

Before you can edit a name, you have to find it and display its details! For this example we will edit a customer. Editing a supplier is just the same, except that you start by choosing *Show supplier* from the *Supplier* menu.

Choose *Customer* > *Show Customer*. You are presented with a window to enter as much of the Customer name or code as you know:

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Iormal 🔾 —	Fuzzy
Name filter	
Name	<ul> <li>contains</li> <li>Contains</li> </ul>
and	C District C is
and	<ul> <li>Customer group is Don't Care</li> </ul>
Search	
🔿 All na	ames O Manufacturers
Select	tion Obnors
💽 Custo	omers 🗹 Exclude patients
Suppl	liers
Z Exclude hidd	en names

- The **slide bar** at the top of the window may be set to Normal, at the left, or at intermediate points towards the Fuzzy end (right); this determines the accuracy of matching your entry; when set to Normal, the search will only match exactly what has been entered; when set at Fuzzy the search will list entries which are approximate matches to what has been entered. The accuracy with which the list matches the entry is determined by the position of the slider.
- If you leave the **Name/Code** text field empty, clicking the **Find** button will produce a full list of all customers.
- You can enter values for the other filters too (or them only!) if you want to refine your search.
- Note that the window has a series of radio buttons to select the target of your search All names, Customers, Suppliers, Manufacturers, etc. So even if you start this search from, say, Customer > Show Customers..., by selecting the Suppliers radio button, you can search in suppliers rather than customers.
- The **Exclude patients** checkbox is checked by default and means that any patients you have in your datafile will not be included in the search. If you uncheck it, any patients in the current store will be included in the search.
- The **Exclude hidden names** checkbox is checked by default and means that any names hidden in your store (but probably visible in other stores) will not be included in the search. If you uncheck this box then the search will include all names in all stores, and their visibility will be ignored.

If the search finds only one name that matches the filter criteria you entered, its details window will be displayed. If more than one name matches then you are shown a list of them all

							Names	6				
2						¥		1				21/6
New	Modify Se	t flags	Print	Find	Order by	Merge	Labels	Report	Custom data	Customise		
Code	Charg	je to	Nam	e	Addr	ess 1	Addres	s 2	Currency	Category 1	Flags	Custom Data
ALD	MCG		Alders Store		12 Excellence	e Lane	Russia		USD			
AMN	AMN		Amnesty Hospital		100 Christma	is Rd	New Zealand		USD			{"Custom Code":{"data":"ABC"},"Insured":{"data":1}}
Baltimor	Baltimor		Baltimor		Cristo Rei		Dili DHS		USD	DILI		
BIK	BIK		Bike Hospital		111 Cycle La	ne	New Zealand		USD			{"Custom Code":{"data":"ABC"},"Insured":{"data":1}}
CAC	CAC		Cactus Hospital		87 Books Roa	ıd	Brazil		USD			
camelrefhosp	camelrefi	hosp	Camelbak Refe	spital (Store)	Australia				AUD	Baure)		{"Custom Code":{"data":"ABC"},"Insured":{"data":1}}
DIL-020-N	DIL-020-	-N	National Health L	boratories	East Dili, CRI	STO REI	DILI		USD	DILI		
Elm	Elm		Elm Pharma		897 Diagon A	Ally	Greece		USD			

# Buttons in the names list window

#### New

This button allows you to enter the details of a new customer

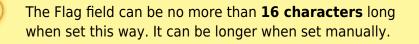
#### Modify

This button opens a window displaying the details of the highlighted customer, allowing their details to be modified.

#### Set Flags

This button allows you to mark certain names with a flag.

• First, highlight the names you wish to flag by holding down the control key (command on Mac) and clicking the names in the list you wish to use. Then click the Flags button to show a window where you can enter the flag you wish to add, and decide whether to replace any existing flags or append the new flag to the old one.



#### Print

Clicking this button will print a list similar to the one displayed on screen.

#### Find

This button shows the same find window as choosing the menu item did so you can find a different group of names.

#### Order by

This button allows you to sort the displayed list by the criteria you choose. The Labels and Print buttons will use the order that is displayed. By default, names are displayed alphabetically based on the name column.

mSupply documentation wiki - https://docs.msupply.org.nz/

2023/09/10 10.24	21/40	export_all
Merge		
This button allows two customers to be merg button to display this window:	ed into one; highlight the two entries clicl	k on the Merge

New	Mo	dify Set flags	Print	Find	Order by	Merge	Labels	Report	Customise	
Code	Charge	Name	4	ddress 1		Address 2	Category 1	Flags	Phone	_
albert	albert	Albert Young memorial hos	pital							
ballh	ballh	Ballance Mem Hosp	Lazimpat	t	Kathma	ndu			977-1-529933	
claus	claus	Clauss Memorial health cen	tre							
duwa	duwa	Duwa regional hospital								
Duwahos	Duwahos	Duwa Public Hospital								
garg	garg	Gargan zonal hospital								
Med	Med 🔴	• •			Merge	names				
pharam	phai									
pleb	pleb									
royal	roya	С Кеер О М	erge			◯ Kee		Merge		
ventura	vent	Viech O M	eige			Nee	۲ ۷	merge		
		Code	duwa				Code	Duwai		
		Code Charge to	duwa duwa				Code Charge to	Duwai Duwai		
		Code Charge to Name	duwa	ual hospital			Code Charge to Name	Duwa	hos	
		Charge to		ual hospital			Charge to	Duwa		
		Charge to Name	duwa	ul hospital			Charge to Name	Duwa	hos	
		Charge to Name Address 1 Address 2	duwa	al hospital			Charge to Name Address 1 Address 2	Duwa	hos	
		Charge to Name Address 1 Address 2 no. of trans	duwa Duwa regior 2				Charge to Name Address 1 Address 2 no. of trans	Duwa Duwa 0	hos Public Hospital	
		Charge to Name Address 1 Address 2	duwa Duwa regior				Charge to Name Address 1 Address 2	Duwa Duwa	hos Public Hospital	
		Charge to Name Address 1 Address 2 no. of trans	duwa Duwa regior 2				Charge to Name Address 1 Address 2 no. of trans	Duwa Duwa 0	hos Public Hospital	
		Charge to Name Address 1 Address 2 no. of trans	duwa Duwa regior 2				Charge to Name Address 1 Address 2 no. of trans	Duwa Duwa 0	hos Public Hospital	

Choose the record you wish to keep and click on *OK* ; the data from the deleted record is then merged with the data of the record being kept. If you change your mind, click on the *Cancel* button, and the merger will be cancelled.

# Labels

Clicking this button allows you to print address labels for the names in the list. The label editor is displayed.

#### Report

Click on this icon to open the Quick Report editor window. Use of the Quick Report is discussed elsewhere in the guide. See Custom Reporting Tutorial

# Custom data

This allows you to bulk edit the Custom data fields associated with the displayed names. An editor window like this will be displayed:

Update	Apply to
	<ul> <li>Selected items</li> </ul>
	<ul> <li>All items in list</li> </ul>
Can	cel Save Changes

Only fields with their checkbox selected in the "Update" column will be modified. Note that you have the option to apply the changes to **all** names currently displayed in the list or only ones that you have **selected** before opening the editor.

Click "Save changes" to apply. After confirmation and processing, you will see your changes reflected immediately in the *Custom Data* column of the names list. It is recommended that you have the *Custom Data* column displayed (see **Customise** below) before bulk editing custom data so you can clearly see which names have been changed.

If you want to remove certain fields entirely from the names, select the field(s)' "Update" checkbox, then switch the selector at the bottom so it says "Fields with default (unchanged) values with be *removed*" (instead of "*updated*"). Any fields you haven't changed from their default values (i.e. blank for text, 0 for numbers, etc.) will be removed upon saving. You can completely remove *all* custom data for selected/displayed names by selecting all "Update" checkboxes, leaving all values default, and choosing the "removed" option.

Make sure you know what you're doing when bulk editing as you can easily over-write a lot of data if you're not careful.

#### Customise

Allows you to choose which columns to display using this window (Note: this only affects the columns you see in this list, it won't affect what other users see):

Available	Chosen	
Category 2	Code	
Category 3	Charge to	
Comment	Name	
Country	Address 1	
Custom 1	Address 2	
Custom 2	Currency	
Custom 3	Category 1	
Customer	>> Flags	
Customer group	>> Custom Data	
Date of birth	<<	
Email		
Fax		
Female		
Freight		
Hold		_
Manufacturer		
Margin		
Master ID		
Master name	 	
Phone		
Postal address 1		
Postal address 2		
Price Category		

Columns on the left are available. Columns on the right are the ones in use in your names list. Click a row in either column then click the move left or right button to transfer it to the other column. Click **OK** when you're done, or **Cancel** if you want to stick with what you've got. Your choice of columns to display will be remembered for the next time you display a list of names (customers, suppliers etc.).

#### **OK Button**

Closes the window

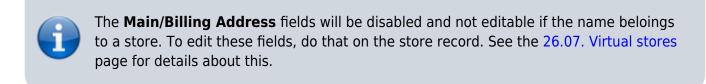
#### Editing or viewing a name

To edit/view a particular name, if you are looking at a list of names double-click the name you want to edit on the list (no need to do this if you are already looking at the name's details page because only 1 name was returned from your search).

You will be shown the name's detail window which has a sidebar showing several tabs, *General, Invoices, Backorders, Quotes* etc. and opens at the *General* tab:

• • •	Ec	dit customer/supplier	
Ceneral Invoices Backorders Quotes Notes Contacts Group Purchase orders Item lists	New customer1 Name Code new1 Charge to new1 Name New customer1 Master ID 0	Contact email web site Phone Fax Price Category	Store: General C
Requisitions Store Photo	Master name	Hold A	Customer details Supplying store Ceneral Printing Print invoices alphabetically
	Category Other Customer V Supplier Category 1 none Category 2 none Manufacturer Category 3 none	Category 4 none Category 5 none Category 6 none Flag	
	Main/Billing Address Address 1 Address 2 Address 3 Address 4 Address 5 Post code Country	Postal address	Shipping address
Delete name		OK & N	ext Cancel OK

Edit any of the fields to the values you want. Note that fields with a padlock need to have the padlock unlocked (by clicking on it) first before you can edit the values. These actions are, of course, only possible if you have the appropriate permissions.



#### **Deleting names**

Click on the **Delete** button in the bottom left hand corner to delete the name.

If a name has transactions entered against it, you will not be able to uncheck the relevant check box in the *Category* section, and you will not be able to delete it. For example, if a supplier has invoices entered against it, you will not be able to uncheck the **Supplier** check box, and you will not be able to delete the supplier.

#### Putting a name on Hold

If you wish to prevent future transactions with a name, change it's status to on 'Hold'.

#### Invoices tab

Here you can view the invoices for a customer or supplier.

	100175-008	1000	CSR-0 PUBLIC	)					Stor	e: District Sanita	ire 0
Invoices									200	En District Samta	
Backorders	6	_							-		
Quotes	-	<b>h</b> .,			Filter	All	٥.		Ov	erpayments	0.00
Notes	Ag	eing							Total o	outstanding	848,324.60
Contacts		-									
Group	Ту	St	Entry dt	Confirm dt	inv num	Their ref	Comment	Total	Currency	Total (local c	Outstanding
Purchase Orders	ci	sg	18/03/2020		7		Web order:	0.00	XOF	0	0.00
ltem List	ci	fn	06/06/2019	06/06/2019	20		Facture ddu client	0.00	XOF	176725	0.00
Requisitions	ci	fn	06/06/2019	06/06/2019	23		Facture ddu client	0.00	XOF	0	0.00
Store	ci	fn	06/06/2019	06/06/2019	24		Facture ddu client	0.00	XOF	0	0.00
Photo	ci	fn	17/06/2019	17/06/2019	125		Facture ddu client	0.00	XOF	0	0.00
Custom data	ci	fn	26/06/2019	26/06/2019	175		Facture ddu client	0.00	XOF	0	0.00
Log	ci	fn	12/07/2019	12/07/2019	239		Facture ddu client	0.00	XOF	0	0.00
Supplier Hub	ci	fn	12/07/2019	12/07/2019	240		Facture ddu client	0.00	XOF	134680	0.00
	ci	fn	15/07/2019	15/07/2019	244		ALLOCAEMENT)	167,180.00	XOF	167180	167,180.00
	ci	fn	15/07/2019	15/07/2019	245		PNSME	6,625.00	XOF	6625	6,625.00
	ci	fn	15/07/2019	15/07/2019	246		PNSME (K+ ZINC)	0.00	XOF	0	0.00
	ci	fn	15/07/2019	15/07/2019	247		PNLS_TRC	0.00	XOF	0	0.00
	ci	fn	22/07/2019	22/07/2019	304		GTC	30,000.00	XOF	30000	30,000.00
	ci	fn	24/07/2019	24/07/2019	344		MEDICAINTRANTS	0.00	XOF	0	0.00
	ci	fn	13/08/2019	13/08/2019	431		GTC	53,400.00	XOF	53400	53,400.00
	ci	fn	16/08/2019	16/08/2019	462		GTC	0.00	XOF	90510	0.00
	ci	fn	16/08/2019	16/08/2019	465		DOTATION ARV	0.00	XOF	0	0.00
	ci	fn	19/08/2019	19/08/2019	469		COMPLETION ARV	0.00	XOF	0	0.00
	ci	fn	19/08/2019	20/08/2019	468			0.00	XOF	0	0.00
	ci	fn	26/08/2019	26/08/2019	509		MEDICANTS PNLP	0.00	XOF	0	0.00
	ci	fn	10/09/2019	10/09/2019	550		MEDICANTS_PNLP	0.00	XOF	0	0.00
	ci	fn	10/09/2019	10/09/2019	551		MEDICATS_PNSME	0.00	XOF	0	0.00
	ci	fn	09/09/2019	11/09/2019	542		MEDICAINTRANTS	296.199.60	XOF	296199.6	296.199.60

Note that the *Total outstanding* field shows a customer's payment balance and is only shown if the customer receipts module is turned on (see 11.02. Receiving payments from customers).

You are able to edit an invoice directly from this window by double-clicking the one you wish to edit. A new window will open with the invoice details displayed.

Last update: 2016/12/23 09:08

export\_all

🧯 Cu	isto	mer invoice								×
The Com	lam ir re	e 102824 If 102824	C504	Confirm date Period Category Backo	01/01/08 - None	31/12/08	•	Ent Goods re	Colour : Invoice : 3,040 try date : 16/12/08 ceive ID : 0 Status : cn ered by : Pharmac Store : General	Black 3 cy assistant
Gen	eral	Summary	by Item Summary by Batch Transport (	details						
	L	Location	Item Name	Quan	Pack Size	Batch	Exp date	Sell Price	Price exten	
	1	TAB	Condom male unit	5	144	6J107	30/09/11	0.00		0.00
D.	2	NON	Gauze swab 8ply 10cmx10cm	3	1			4.58		13.76
12		NON	Gauze swab 8ply 5cmx5cm	5	1			1.72		8.60
_	4	NON	Examination Gloves large	1	100			0.00		0.00
	5	AAA	Amoxycillin 500mg cap	1000	1			0.00		0.00
	6	VAC	Hep B 10 dose vial	20	1	WVA06026	26/11/09	0.00		0.00
	7	LTE	Chlorhexidine 1% solution (mL)	1	5000	80356	30/03/12	0.00		0.00
										-1
										-
4	G		Other charges Item	1:				A	mount:	0.00
-			J					S	ubtotal:	22.36
								(	0 % tax:	0.00
									Total:	22.36
Ho Fir	old naliz	ze Expo	ort batch: 0			OK & Next		Delete	ОК	_ □ ₽

#### Buttons on the Invoices tab

#### **Print Range**

Click this button to print a range of invoices for a customer. You will be asked to enter the first and last invoice numbers to be printed.

#### Aging

Click this button to display a list of aging categories and the outstanding unpaid balance for each invoice in each category.

Outstanding summ	ary – 🗆 🗙
Cut off days	Outstanding totals
less than 30 days	0 ^
30 to 60 days	0
60 to 90 days	0
90 to 120 days	0
120 to 180 days	0
over 180 days	0
<	Ň
	-
	OK
	.:

#### Dates

Choose a date range from this menu to show quickly recent invoices, or to revert to showing all invoices

#### **Backorders tab**

Seneral nvoices lackorders						Store: General 💌	i
Quotes	-	*	-			All	
lotes Contacts	New backo	rder Delete backorder Copy	Print				
mails	Code	Item	Order date	Quantity	Stock	Comment	
roup	Lig11	Lignocaine 1% 20ml/50ml vial	22/02/11	5	10		
urchase orders	Cotsyr	Cotrimoxazole 240mg/5ml susp (100mL)	22/02/11	110	13816		
/eb log-in	Erysyr	Erythromycin 125mg/5ml susp (100mL)	22/02/11	8	3729		11111
avourites	Flusyr	Flucloxacillin/Cloxacillin 125mg/5ml susp (1	22/02/11	10	11900		
ock history	Mebsyr	Mebendazole 100mg/5mls syrup (30mL)	22/02/11	10	0		
tore	Parsyr	Paracetamol 120mg/5mls syrup (mL)	22/02/11	20000	578050		
	Sal4	Salbutamol 4mg tab	22/02/11	400	50400		
	Amo500	Amoxycillin 500mg cap	22/02/11	3000	723000		
	Flu500	Flucloxacillin/Cloxacillin 500mg cap	22/02/11	2000	4700		
	Asp3	Aspirin 300mg tab	22/02/11	1000	566700		L
	Ate5	Atenolol 50mg tab	22/02/11	1000	60648		
	acrsol	Acriflavin 0.1% Solution (manuf) mL	22/02/11	1000	0		
	Savl	Cetrimide+Chlorhexidine (Savion) 15%+1.5	22/02/11	1000	624072		
	Chexobs	Chlorhexidine obstetric lotion 1% (gm or m	22/02/11	1	28220		
	Lubjel	Lubricating jelly (KY) (82g)	22/02/11	10	2750		
	PermSlot	Permethrin 5% Lotion (bottle/tube)	22/02/11	5	483250		-

• Here you can view, add and edit the backorders for a customer. mSupply allows entry of backorders against suppliers as well, but we are not sure why you would want to do this!

#### Buttons on the Backorders tab

#### New backorder

Clicking this button presents you with a window where you can add a backorder line for this customer.

2	New Backorder
Item	Leaf Surgical supplies 23/03/2015 0
Comment	Cancel OK

- Type at least a portion of the item code or item name, then press the Tab key.
- Today's date is automatically entered. You can change the date if you like
- Enter the total quantity owing.
- Enter a comment (e.g. an expected arrival date)
- Click OK to save changes and exit the window.

#### Delete backorder

Click a backorder line to highlight it, then click this button to delete the line. You can also select several at once (using *ctrl/cmd+click* and *shift+click*) or all the backorders in the list using *ctrl/cmd+a* and delete them at once as well.

#### Сору

This command copies the backorder to the clipboard, allowing you to paste the report into an email message, word processor or spreadsheet document.

#### Print

The list of backordered items for the customer is printed.

#### Viewing backorders

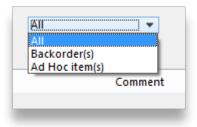
Double-click a backorder line to edit the line. You will be shown the backorder entry window, where

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you can change any details you wish.

#### Show

This drop-down list allows you to choose which backorders to display.



- Backorders are normal items that have not been supplied to customers.
- Ad Hoc items are items that customers have ordered but which you do not want to add to your stock list, rather making a special order just for that customer.

#### **Quotes tab**

General Invoices	And in case of garants of the									Stor	e: 🤇	Seneral	- I)	
Backorders														
Ouotes	💿 👘													
Notes Contacts	New Quote Delete Qu	uote	Sho	ow: All				•						
Emails	Item	Date	Cur	Rate	Price	Pac	Freight	S	Cost	Adj Cost	Pr	Valid Until	Comment	٠
Froup	Chloramphenicol 5% ear drops	25/02/09	NZD	0.7485	3.55	1	1.00		2.65	2.6571		20/03/09	NZ. Air freight	=
urchase orders	Phenytoin 50mg/ml amp	25/02/09	NZD	0.7485	115.0	5	1.00		86.12	17.2259		20/03/09	250mg/5ml. NZ. Air freigh	
Veb log-in	Ranitidine 25mg/mL amp	25/02/09	NZD	0.7485	13.65	5	1.00	-	10.21	2.0434		20/03/09	NZ. Air freight	
avourites	Suxamethonium 100mg/2ml amp	25/02/09	NZD	0.7485	230.3	50	1.00		172.38	3.4477		20/03/09	NZ. Air freight	
tock history	Amoxycilin+Clavulanate 500mg+1	25/02/09	NZD	0.7485	66.00	100	1.00		49.40	0.4940		20/03/09	unk brand, india. Air	
tore	Enalapril 5mg tab	25/02/09	NZD	0.7485	3.10	100	1.00	7	2.32	0.0232		20/03/09	unk brand, india. air	
	Griseofulvin 500mg tab	25/02/09	NZD	0.7485	97.00	500	1.00	V	72.60	0.1452		20/03/09	unk brand, india. air	
	Salbutamol 4mg tab	25/02/09	AUD	1.0000	5.96	500	1.00		5.96	0.0119		20/03/09	unk brand, india. air	
	Hydrocortisone 1% cream (15g tub	25/02/09	NZD	0.7485	3.25	1	1.00	_	2.43	2.4326		20/03/09	unk brand, india. air	
	Metformin 500mg tab	25/02/09	NZD	0.7485	14.45	500	1.00	7	10.81	0.0216		20/03/09	unk brand, india. air	
	Blood test strips - Advantage II (50	12/03/09	NZD	0.7485	30.25	1	1.00		22.64	22.6421		09/04/09 Ro	CIF price - air freight	
	Naloxone 400mcg/ml amp	31/03/09	NZD	0.7485	49.68	5	1.00		37.18	7.4370		30/04/09	AF,	
	Phenoxymethylpenicillin (PerV) 12	31/03/09	NZD	0.7485	3.95	1	1.00	_	2.95	2.9565		30/04/09	AF	
	Captopril 25mg tab	31/03/09			25.65	500	1.00		19.22	0.0384		30/04/09	AF Fiji (Apotex)	
	Motoolonenvide 10ma tab	21 102 100	NZD	0.7406	7 90	100	1.00		E 07	0.0597		201704100	AE	

You can view the quotations you have entered in mSupply for this supplier.

#### Notes tab

To add, edit or delete a note, click on the *Notes* tab, and this window displays:

Seneral nvoices Backorders Quotes	Multichem Exports	Ltd		Store: General	•	
lotes	Date			Note		
ontacts mails roup urchase orders /eb log-in avourites took history tore	03/06/11	Open day - 1 July 2011, 10:00-20:0	0			
				OK & Next	Cancel	OK

Click on *New note* to create a note, or select an existing note and double click on it to view, edit or delete it.

Add C	Customer/Supplier notes	×
	01/12/11 Modfied by: Sussol	
Note	Closed for stocktaking - 30/31 December	1
Display	when Purchase Qider is created > Pick Color Beep 0 times	
	all Cancel OK Supplier Invoice is created Purchase Order is created	
	Goods Receipt is created Customer Invoice is created	_

- The date on which you are entering a new note is already completed, and in the main panel you should type in the wording of the note itself.
- In the lower left of the window is a drop-down list offering various choices concerning the displaying of the note on screen; it may appear as an alert when a Supplier invoice is created, when a Purchase Order is created, etc..

If **never** is chosen, the note will never be displayed on screen, and if *all* is chosen, it will display for all events for this customer/supplier. You may also set the background colour of the note , but as the text is always black, dark colours should be avoided. A further option allows you to have one or more audible `beeps' sound when the note is displayed. Each note will display according to the attributes set for it, independently of other notes defined for the same customer/supplier.

Subsequently, when this customer/supplier is selected and depending on the display settings made, the note will appear on screen. Be aware that the note does not disappear automatically - you must close it manually.

The text of a note can be up to 32,000 characters.

Click **OK** when you are finished.

#### **Contacts tab**

General Invoices Backorders Duotes Notes		Contact			Store: Bada	AMS 🔄 🚺
iontacts proup urchase orders em lists lequisitions tore thoto	First	Last	Position	Emsil	Phone	Category
					OK & Next C	ancel OK

#### Adding a contact

To add a contact for this customer or supplier, click the **Add contact** button, then enter the details in the window that appears:

Last	Web Login
First	Can login to the web interface
Position	Username
Phone	Password
Email	
Address 1	
Address 2	
Country	
Comment	
Category	
Category 2	
Category 3	
Info if related to a customer or supp	plier
Name USAID	

- Info if related to a customer or supplier textbox: read only. Shows the name of the customer or supplier this contact belongs to. Will be empty if this contact does not belong to a name.
- Web login: in this section you enter the authorisation details that this contact will have if it is used for accessing the REST API or one of mSupply's web interfaces. See the 19.03. mSupply customer web interface and 19.09. mSupply REST API pages, for example, for more details.

#### **Deleting a contact**

To delete a contact, click on the contact you wish to delete, then click the **Delete contact** button.

#### **Group tab**

eneral woices	London Dispensary	Store: General 👻	i
ackorders			
uotes	Customer group none 💌		
lotes			
ontacts	Item departments which can be supplied to this group.		
mails	Item departments		
roup			
irchase orders			
eb log-in			
vourites			
ock history			
ore			
	Warning: setting a customer group can affect which items can be supplied	to them	
	and the second		
	방법 승규가 가장 것 같은 것 수 있는 것이 가지 않는 것 수 있다. 영국에		



If this customer has been added to a group, this tab displays the name of that group. An explanation of groups and how to work with them is here: Show groups...

omer group en departmen	none none hospital > 50 beds hospital < 50 beds Urban clinic Rural clinic MCH clinic Island health post	plied to this group.

Here you can select the group of which a customer is a member. When you choose a group, you will be shown a list of item departments which are linked to the chosen group. Once the group system is activated in the Preferences, only items belonging to one of the listed departments (or items with no department) may be supplied to that customer.

#### **Purchase orders tab**

eneral	Inte	rnationa	l Dispens	ary Associa	io				Store	General	-		
woices									store	General	•		
ackorders													
uotes		Ord no	<b>F1-1</b>	D. I.					Commen				
otes				Date	Loc				Commen	a.			
ontacts		100	-	17/12/0		0		NON-DRUGS IDA ORDER 1					
mails		123		28/01/0	_	0		KIRDRUGTENDER 1					
roup		193		24/06/0		0							
urchase orders		325		25/03/1		0		Controlled Drugs Order AF					
/eb log-in	٦.	291		05/01/1	_	21	50						
avourites		358		20/07/1		0		Drug Order July 2010 AF					
tock history		404		15/12/1		0		IDA Tender Order Air freight					
tore		410		15/12/1		0		IDA Tender Order Sea Freight					
		424		22/03/1		0	1	PO generated for tender number	: 23 No o	f PO Lines 1			
		432	cn	30/06/1		0	2						
												-	
	-	e						m				•	
	-												

This tab shows a view of Purchase Orders for the current name, and applies to suppliers only.

#### Web log-in tab

Le Edit customer/s	upplier	
General Invoices	International Dispensary Associatio	Store: General 💌
Backorders Quotes		
Notes Contacts	Customer / Supplier user name	
Emails Group Purchase orders	Connection speed Low	
Web log-in Favourites		
Stock history Store		
Store		
		OK & Next Cancel OK

If you are allowing customers to access their order information using the mSupply web server, this is the window where you assign a logon name and password to a customer.

Also displayed on this tab is the internet connection speed. It should be noted that this value is derived from your network settings, and may not be edited manually.

#### Item lists tab

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• •		Edit cus	tomer/supplier		
neral Dices	Norvic Department				Store: (HQ Store 0)
ckorders					
otes					Default Order Days 0
es	Item lists attached to this nar	ne		Items	
tacts	Image: A state of the state			Item	Item name
IP	Add master Delete list			code	Abacavir 120 + Lamivudine (3TC) 60 mg Tablet
nase Orders	list				Abacavir 120 + Lamivudine (STC) 60 mg Tablet
List	List Master			-	Acetazolamide 250mg tab
isitions	name list	Imprest Requisiti Web	Price	-	Acetylcysteine Injection 200mg/ml
Visibility	2025 Hospital EML 🛛 🖉			-	Acetylsalicylic acid 100mg tablet
0	Hot Climate list 📿				Aciclovir (Acyclovir) 250mg vial
om data				-	Aciclovir (Acyclovir) 400mg tablet
				-	Aciclovir (Acyclovir) 800 mg tablet
pply Link				0600	Acriflavine 0.2% solution
5				06_0078	Acyclovir 3% Tube (5g)
				06_0079	Acyclovir 5 % cream
				12 5846	Adaposina Injection 2mg/mL visi
	Style Sort by Group	- Freed	🗐 💿 Im	g method iprest ocktakes	
			OK & Pr	evious	OK & Next Cancel OK

This tab is used to assign master lists to customers for use in requisitions and mSupply mobile. For more information, see Item master lists.

**Note:** Before version 5.3 customers could also have local lists assigned to them (they applied to that customer only) but these have been removed from version 5.3 onwards.

export\_all

000				Edi	it cust	omer/sı	upplier			
General Invoices Backorders Quotes	Norvic Department								Store: HQ Store 0 Default Order Days	<b>i</b>
Notes Contacts Group Purchase Orders	<u> </u>	ete list	e						Item name Abacavir 120 + Lamivudine (3TC) 60 mg Tablet Abacavir 600 + Lamivudine (3TC) 300mg Tablet	
Item List Requisitions Store Visibility Photo Custom data	List name 2025 Hospital EML Hot Climate list	Master list	Imprest	Requisiti	Web	Price		03_0050 04_0720 03-0066 03_0072	Acetazolamide 250mg tab Acetylcysteine Injection 200mg/ml Acetylsalicylic acid 100mg tablet Aciclovir (Acyclovir) 250mg vial Aciclovir (Acyclovir) 400mg tablet	
Log mSupply Link Tags	Imp	scription	2025 Hosp	🛃 Re	st quisition	15		06_0080 0600 06_0078 06_0079	Action (Acycloni) 400ing tablet Acriflavine 0.2% solution Acyclovir 3% Tube (5g) Acyclovir 5 % cream Adenosing Injection 3mn/ml vial	
	Style Sort by		) Exc	Cancel	Gener	OK ate	• 51	method est ocktakes		
							OK & Pr	evious	OK & Next Cancel O	ĸ

For a facility or customer, you can set the master list to function as :

- 1. In imprest form
- 2. In all types requisition form such as `Customer Stock history`, `Response` and `Request` requisition. For this the `Requisition` checkbox needs to be ticked.
- 3. Ordering list for web : This is for online web orders that the facility or customer may want to place.
- 4. Price list : We can use this to set the price per item per facility or customer.

#### Stock history tab

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Health Centre				Store:	General	-	i
Id	Entered date	Stock take date		Status		Type	*
753	11/09/09	11/09/09	cn		im		
1650	22/02/10	22/02/10	cn		im		
2106	19/05/10		sg		im		
2479	08/08/10	08/08/10	cn		im		
3008	25/11/10	25/11/10	cn		im		
							-
	Id 753 1650 2106 2479	Id         Entered date           753         11/09/09           1650         22/02/10           2106         19/05/10           2479         08/08/10	Id         Entered date         Stock take date           753         11/09/09         11/09/09           1650         22/02/10         22/02/10           2106         19/05/10         2479	Id         Entered date         Stock take date           753         11/09/09         11/09/09         cn           1650         22/02/10         22/02/10         cn           2106         19/05/10         sg         cn           2479         08/08/10         08/08/10         cn	Id         Entered date         Stock take date         Status           753         11/09/09         11/09/09         cn           1650         22/02/10         22/02/10         cn           2106         19/05/10         sg         cn           2479         08/08/10         08/08/10         cn	Id         Entered date         Stock take date         Status           753         11/09/09         11/09/09         cn         im           1650         22/02/10         22/02/10         cn         im           2106         19/05/10         sg         im           2479         08/08/10         08/08/10         cn         im	Id         Entered date         Stock take date         Status         Type           753         11/09/09         11/09/09         cn         im           1650         22/02/10         22/02/10         cn         im           2106         19/05/10         sg         im           2479         08/08/10         08/08/10         cn         im

A list of stock histories, showing dates of both the stock take and the date of entry into the computer, the ID reference, the status and the type, is displayed.

# **Store Visibility tab**

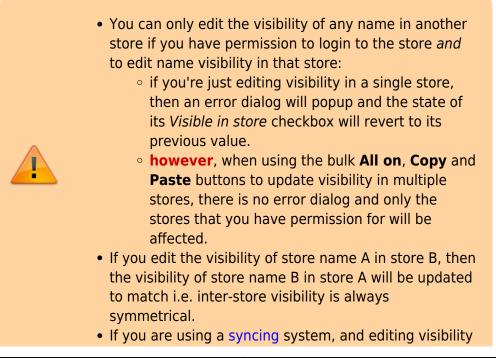
#### Updated version 4.12

The tab shows which stores the customer/supplier is visible in. Only when the visibility checkbox is checked will the customer/supplier be visible to 'this' store, which is needed if the store will receive and/or issue goods from 'this' store.

• • •		Edit customer/supplier	r	
General Invoices Backorders	Test customer Search stores		Store: General 0	i
Quotes		Stores	Visible in store	
Notes	General			
Contacts	Registration			
Group	Test dispensary		i i i	
Purchase Orders				
Item List				
Requisitions Store Visibility				
Photo				
Custom data				
Log				
Supplier Hub				
Tags				
	All on Cop	Paste	OK & Next Cancel OK	
				_

There can be a huge number of stores in this list. If you want to find a particular store or group of stores you can type in the *Search stores* field just above the list. This will restrict the list to only stores with a name that contains what you have typed.

- All on button: When clicked, this will check all the checkboxes in the *Visible in store* column and the button label will change to *All off*. Clicking it then will uncheck all the checkboxes.
- **Copy button**: Will copy the current state of the *Visible in store* checkboxes.
- **Paste button**: Will make the current state of all the *Visible in store* checkboxes the same as it was when the **Copy** button was clicked.



for a store name, that can affect the sync settings for the store on other sites i.e. if you make it invisible to all stores which are **Active** on a site, then the sync status will become **None** on that site; and if you make it visible to at least one store which is **Active** on a site, then the sync status will become **Transfer** on that site - see Store sync-with options.
In a syncing system, facility names (customers, suppliers, etc.) can only be created and edited on the primary server. Patients can be created in any dispensary, including on a sync site. After that, their visibility is controlled on the central server (after they sync there) in the same way as other names, so

everything on this tab (including the **All on**, **Copy** and **Paste** buttons) will be read only on a sync satellite.

When a customer / supplier is created, it will only be made visible in:

- its home store (the store that you are logged into when the name is created; see Home store for details), and
- any other stores *if* their store preference Names created in other stores not visible in this store is switched OFF (there's an equivalent store preference for patients, which can be switched OFF to make new patients visible in other dispensary stores) - see Store preferences for more details.

#### Photo tab

On this tab you can assign a photo of the customer or supplier and set their world map coordinates. Both of these can be used in reports. • • • Edit customer/supplier General Test customer 01 i Store: Central Contraceptiv Invoices Backorders ÷ Quotes Add photo Delete Photo Map coordinates 0 Kb Notes Map coordinates Contacts Group 0 Lat Purchase Orders Long 0 Item List View on Map Requisitions Store Visibility Custom data Log mSupply Link Tags OK & Next Cancel OK

#### Adding or deleting a Photo

To add a photo, either copy the contents of a file to the clipboard and paste them into the image area or click on the **Add photo** button and select the picture file (png, jpg, bmp or gif files supported).

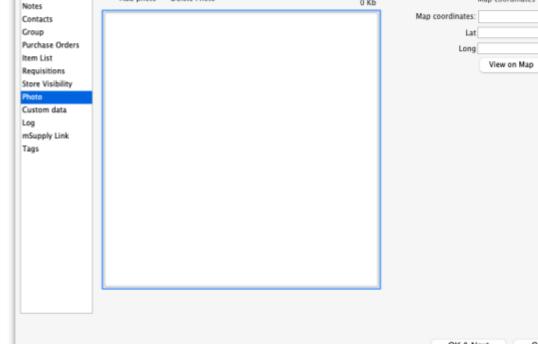
To delete a photo either click on it in the image area and press the delete key on your keyboard or click on the **Delete photo** button.

#### Map coordinates

- You can use Google Maps to find the latitude and longitude coordinates of a customer. The format of the numbers copied from Google maps is "latitude, longitude".
- Copy these numbers into the **Map coordinates** field and press the *Tab* key on the keyboard. mSupply will copy the Latitude and Longitude numbers to their appropriate Lat and Long fields below.
- You can also enter the numbers manually into the Lat and Long fields shown in the screenshot.
- You can then view the customer's location by clicking the **View on Map** button.

#### Custom data tab

#### export all



0 0	Edit customer/supplier	
General	Test customer 01	Store: General O
nvoices		Store: General O
lackorders	New field 1	
Quotes	New field 1	
lotes	New field 2 0	
ontacts		
roup	New field 3	
urchase Orders	New field 4 00/00/00	
em List	New held 4 00/00/00	
equisitions	New field 5	
tore Visibility		
hoto		
ustom data		
og .		
upplier Hub		
ags		
		OK & Next Cancel OK

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export\_all

This tab shows all the custom fields that have been set up in the preferences. See the 16.11. Custom fields page for details.

You can edit or enter values in the fields as required. When you click on the **OK** or **OK & Next** buttons the values will be saved.

#### Log tab

2025/09/16 10:24

0				Edit customer/	supplier		
General Invoices	Test customer 01					Store: General	•
Backorders	Date	Time	User	Event type		Event	
Quotes	04/05/2021			Create name	Name created		
Notes							
Contacts							
Group							
Purchase Orders							
Item List							
Requisitions							
store Visibility							
Photo							
Custom data							
Log							
Supplier Hub							
Tags							

This tab shows a list of all the log entries that belong to this name. These entries will also appear with all the other logs for other events throughout mSupply in the log. See the 25.19. The system log page for details.

If you want to see more details about one of the logs, double-click on it in the list and a detail window, populated with the log's details, will open.

#### Supplier hub tab

This tab allows you to register suppliers in the mSupply supplier hub. Enter the site name you wish to register the supplier with in the **Site name** field and click on the **Register** button.

General Invoices	Test customer 01 Search tags		Store: Central Contraceptiv •
Backorders Quotes Notes Contacts Croup Purchase Orders Item List Requisitions Store Visibility Photo Custom data Log mSupply Link Tags	Tags Tag1 Tag2	Use	
			OK & Next Cancel OK

# Tags tab

This tab allows you to assign any name tags that you have setup to this name. The table shows a list of all the name tags currently setup in your system. To assign one to this name, simply check the corresponding checkbox in the *Use* column.

If the list of tags is long, you can type something in the **Search tags** field to make the list display tags which contain what you typed only.

**Please note:** if you assign a tag to a name that is also a store, the tag will be copied to that store's store tags. See the 25.08. Virtual stores page for details on store tags.

See the 5.05. Name tags page for details on how to create and edit name tags.

# Import new name codes

If you need to change the name codes for a selection of names, it is a technically challenging process that is easy to get wrong if done manually, especially if you intend to re-use existing codes (not recommended!). Custom code has been developed to do this in bulk. Please contact Sustainable Solutions on support@msupply.foundation to discuss this. Include a link to this heading Code to



The relevant details are:

- Method: z\_importExcelToUpdateNameCode
- mSupply Github issue 13670

Previous: 5. Customers and Suppliers | | Next: 5.02. Contacts

# 5.06. Suppliers: adding and viewing

# **New supplier**

To add a supplier, choose this item.

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le 🛛			New supplier	×
General	Name Code Charge to Name Master ID Master nam	_	Contact email web site Phone Fax Status Hold Preferred	Store: General  Currency NPR Currency NPR Supplier details Margin 0 Freight factor 1 Printing Print invoices alphabetically
	Category C Customer Supplier Manufacturer Benchmark	Category 1 none Category 2 none Category 3 none	Category 4 none Category 5 none Category 6 none Flag	Custom 1  Custom 2  Custom 3  Comment
	Main/Billing Address Address 1 Address 2 Address 3 Address 4 Address 5 Post code Country		Postal address	Shipping address
Delete name	:		a	K & Next Cancel OK

Note- if this supplier will have invoices entered against it and you are exporting invoice data to an accounting program, a new "creditor" must be made in your accounting software with the same code, or you will get an error when you import! (You can usually make the code when you get the error in your accounting software when you try to import!)

The window for viewing/editing a supplier contains basic information. Fields that especially relate to suppliers include:

**Currency:** If you are using currencies, enter the currency used by this supplier. This value will be filled in with the value set in the "default currency" option of the Preferences.

**Margin:** The amount (as a percentage) that will be added to the cost price to calculate the sell price when you enter an invoice. For example, if you enter "10", items from this supplier that are bought for 30 dollars will have their value increased by 10% (i.e. 3 dollars) and will be sold for 33 dollars.

**Category:** You will note that the Supplier box is already checked. The special Benchmark category is discussed fully in the section on Tender management, which you can access here.

**Freight factor:** The amount to multiply supplier quotations by to account for freight charges. (If their quotations are "CIF" you should set this to zero).

# **Show suppliers**

This item allows... you guessed it - you to view suppliers. This window is displayed.

Show suppliers ×
Normal 🛛 Fuzzy
Name filter
Name 💌 contains 👻
and 💌 Category 1 💌 is Don't care 💌
and 💌 Customer group Don't care 💌
Search
All names     Manufacturers
Selection ODonors
○ Customers
Suppliers
✓ Exclude hidden names
Complex Find Cancel Find

In the field, type as much of the supplier name or code as you want to. If there is only one matching item, the details will be displayed, otherwise a list will be displayed from which you can choose the name you want by doubling clicking it.

Previous: 5.04. Name categories | | Next: 6. Purchasing

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