

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

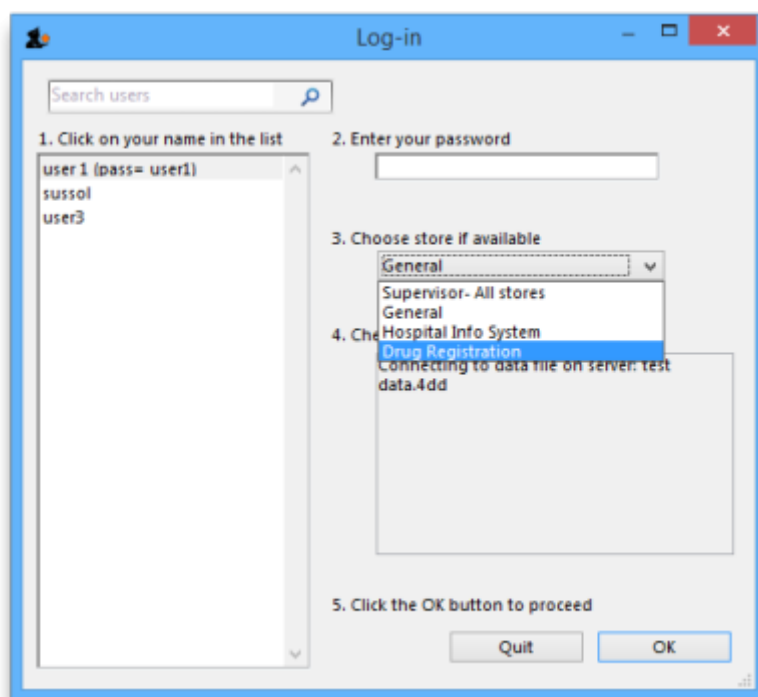
To make existing suppliers and manufacturers visible, you need to make them visible in the Registration module 'store' - refer [Names: Using, adding and editing, the Store tab](#).

Make existing items visible

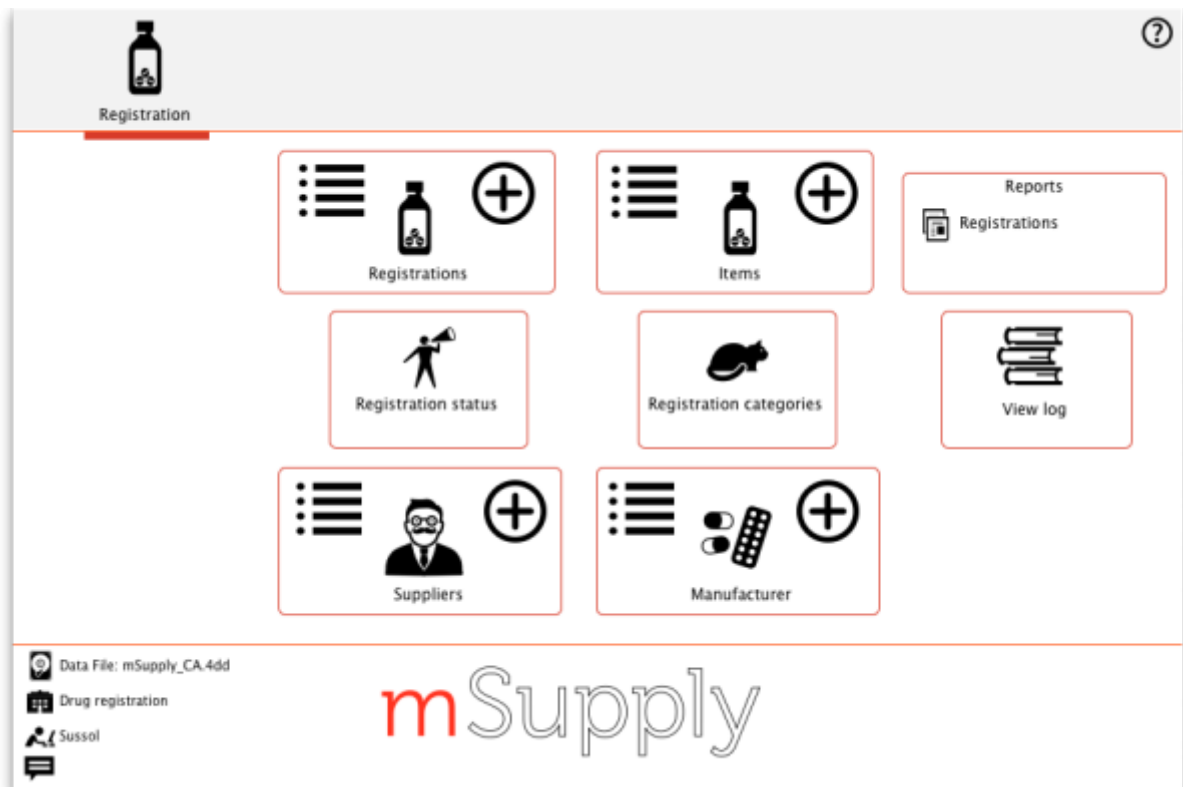
To make existing suppliers and manufacturers visible, you need to make them visible in the Registration module 'store' - refer [Items, the Stores tab](#). This must be done while logged in to another store.

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:



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 registrations

Find Registrations whose

Expiry date

is on or b...

and

Supplier Name

starts with

and

Item code

starts with

and

VEN Category

Don't Care

and

category 1 is

Don't Care

and

category 2 is

Don't Care

and

category 3 is

and

category 4 is

and

Status is

Don't Care

Cancel

Find

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

Drug registrations...

New

Delete

Find

Filter list as: Item name

Item name

25/25

Item Name	Supplier	Status	Application number	Registration number	Trade name	Is registered	Registration expiry
Test_item	Test Drug Reg		1	1	guardian	<input type="checkbox"/>	
Co-trimoxazole [Septrin] 40mg/...	Academy Chemic...		6	6	Test trimoxazole	<input checked="" type="checkbox"/>	3/5
ABC 300mg, tablet	Access Spectrum		3	3	Natural ABC	<input checked="" type="checkbox"/>	12/1
Fendona 10kg	Hetero Labs Limi...		4	4	Hetero Fendona	<input type="checkbox"/>	
Levofloxacin, 1g	Alere Medical Co...		5	5	Alere Levofloxacin	<input type="checkbox"/>	
Diclofenac sodium 50mg, tablet	FIND		7	7	DH Diclofenac	<input type="checkbox"/>	
Artesunate injection 60 mg	Nanova Co.Ltd		8	8	Artesunate	<input type="checkbox"/>	
Ball bearing for plug fan motor	Drug Registration		9	9	Ball AHP	<input type="checkbox"/>	4/2
NMCP Future item 2	Waimaw Townsh...		10	10	Manufacturer	<input checked="" type="checkbox"/>	12/2
Cefixime 100mg, tablet	Indaw township	Refused	11	11	fireg	<input type="checkbox"/>	
Rack with lid for 1-2ml Cryo vial	Drug Registration		12	12		<input type="checkbox"/>	
Lab requisition form	Lanmadaw Town...		13	13	labreq	<input type="checkbox"/>	
ABBOTT EID m2000 Reagent Kit...	Htilin Township		14	14		<input type="checkbox"/>	7/2
Hand Compression Sprayer Ca...	Bago MMA	Waiting for docume...	15	15	higy	<input checked="" type="checkbox"/>	4/2
Water for injection 5ml, bottle	Indaw Township		16	16	jubilee	<input type="checkbox"/>	
Zilprenium	Zegong Township		17	17	asd	<input type="checkbox"/>	
Zilprenium	Zabbuthiri Town...		18	18	jsd	<input type="checkbox"/>	
Quinine DHCL, Inj 300mg/ml,2ml	Waw Township		19	19	gdfdg	<input type="checkbox"/>	
Laboratory Coat, Medium	Tabayin Township		20	20	ddfgd	<input type="checkbox"/>	
Water for injection 5ml, bottle	Waibargi Towns...		21	21		<input type="checkbox"/>	
Gene Xpert Machine (4 modules)	JICA		22	22		<input type="checkbox"/>	
ABC 300mg, tablet	Alere Medical Co...		23	23		<input type="checkbox"/>	
Electronic Pipette Boy	Access Spectrum		24	24		<input type="checkbox"/>	
Cefixime 200mg, tablet	Access Spectrum		25	25		<input type="checkbox"/>	

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.

Find

This allows you to refine your search without having to go back to the previous window.

View / edit registration

To view and edit the details of a registration, **double click** it in the list and it will bring up a window where you can view and edit the details:

Drug registration details...

Supplier: KERIPIA SC

Item Name: Acetylcysteine Injection, 200mg/ml, 10ml

Manufacturer: KERIPIA SC

Trade name: AcetySuper

Pack Size:

Comment: test

Application number: 8

Application date: 2017-02-05

Registration number: 8

Reg. expiry date: 00-00-00

Category 1: None

Category 2: None

Category 3:

Category 4:

Status: Refused

Approval date: 00-00-00

Currently registered: ☐

Document Log

Add Remove

Document name	Date uploaded

OK & Next Cancel OK

New registration



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:

New drug registration...

Supplier

Item Name

Manufacturer

Trade name

Pack Size

Comment

Currently registered ☐ Approval date 00-00-00

Application number 0

Application date 00-00-00

Registration number

Reg. expiry date 00-00-00

Category 1 None

Category 2 None

Category 3

Category 4

Status None

Document **Log**

Add Remove

Document name	Date uploaded

OK & Next Cancel OK

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 Supplier 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

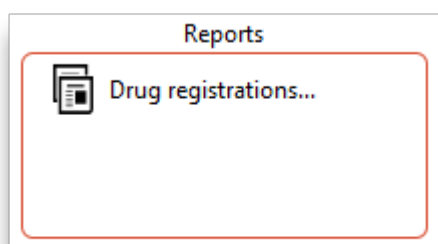
See [Names: using, adding and editing](#)



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.

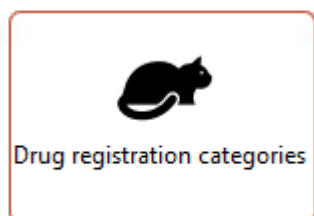
Reports



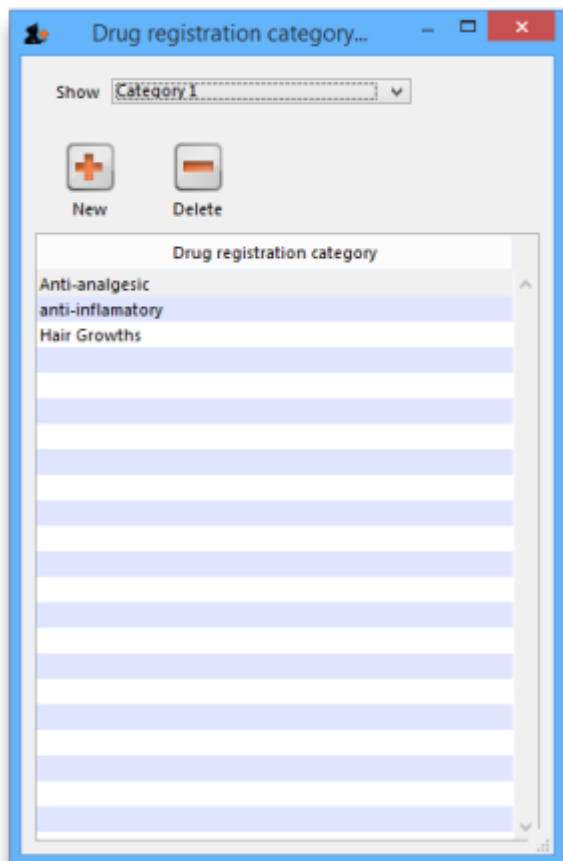
Clicking on Registrations will open a report listing all of your registration records.

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:



View registrations in category

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

New

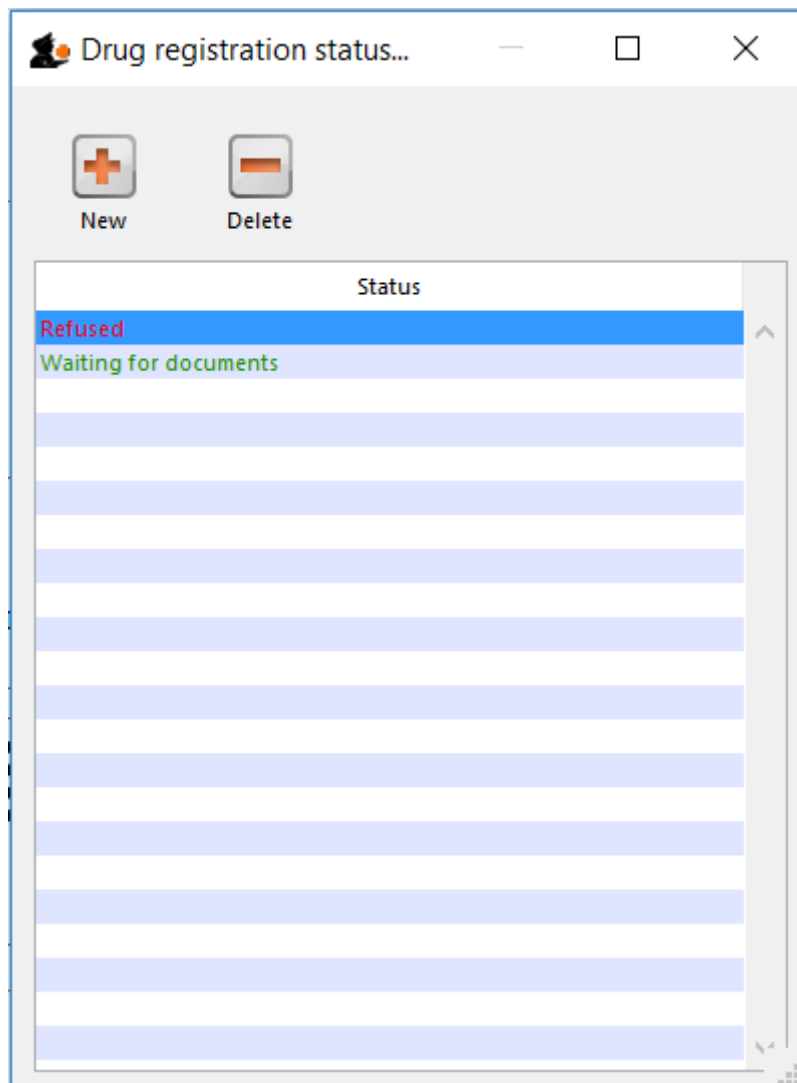
- Click the **New** button to add a new category.

Delete

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

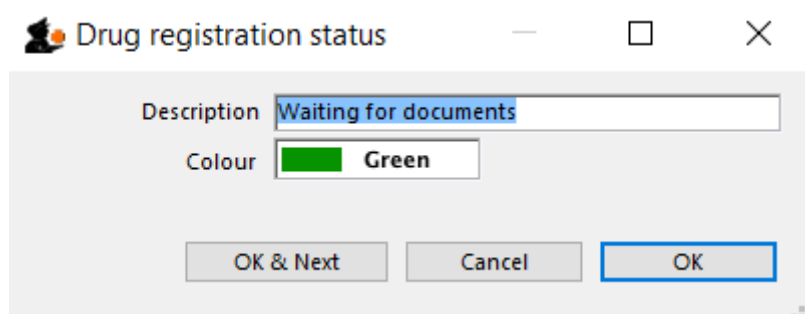


If there are registrations assigned to a category, then mSupply will not let you delete the category until you have removed the category from the *drug registration records*. mSupply will open the category so that you can see the Registration records that are assigned to this category.



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.



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.

To add a new customer:

- 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).



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 non-printable characters in the name, code or charge code will be replaced with an underscore (_).

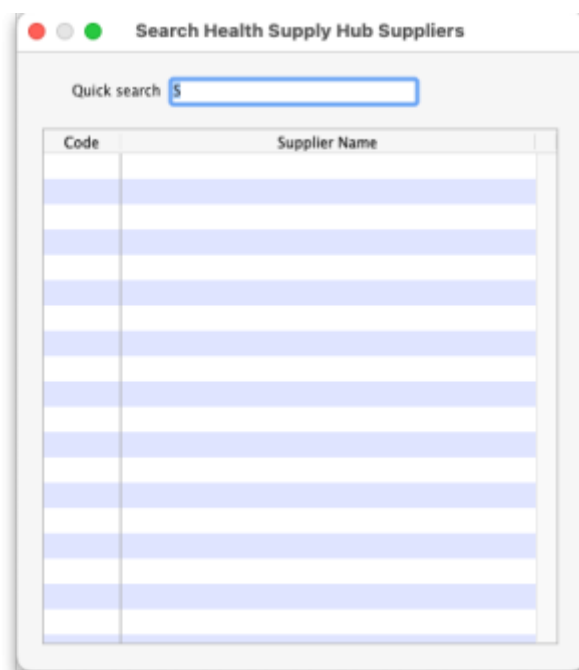
HSH code & HSH name

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 manufacturers 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:



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.

If 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.

Type

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:

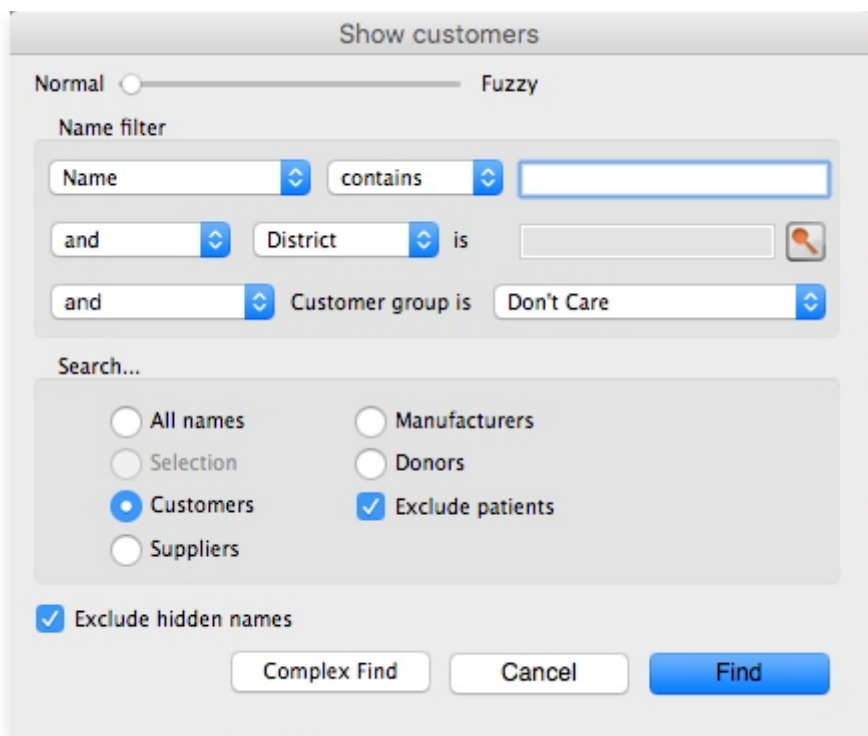
- **Special > Show stores > [choose your store and double-click] > Preferences tab**
- Check the **Able to specify manufacturer when receiving, ordering or quoting for items** checkbox

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:



- 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

Code	Charge to	Name	Address 1	Address 2	Currency	Category 1	Flags	Custom Data
ALD	MCG	Alders Store	12 Excellence Lane	Russia	USD			
AMN	AMN	Amnesty Hospital	100 Christmas 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 Lane	New Zealand	USD			{ "Custom Code": { "data": "ABC" }, "Insured": { "data": 1 } }
CAC	CAC	Cactus Hospital	87 Books Road	Brazil	USD			
camelrefhosp	camelrefhosp	Camelbak Refe...ospital (Store)	Australia		AUD	Bau...re)		{ "Custom Code": { "data": "ABC" }, "Insured": { "data": 1 } }
DIL-020-N	DIL-020-N	National Health Laboratories	East Dili, CRISTO REI	DILI	USD	DILI		
Elm	Elm	Elm Pharma	897 Diagon 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.



The Flag field can be no more than **16 characters** long when set this way. It can be longer when set manually.

Print

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

Find

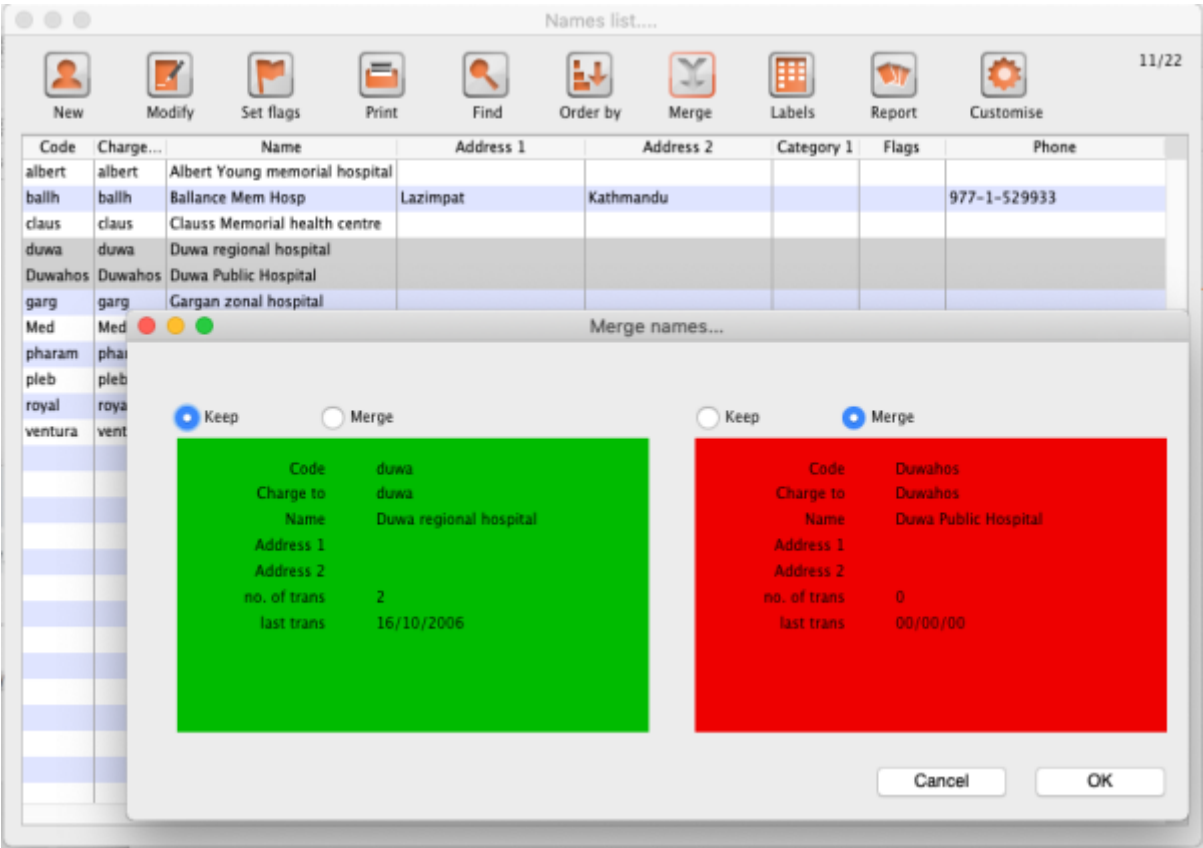
This button shows the same find window as choosing the menu item did so you can find a different group of names.

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.

Merge

This button allows two customers to be merged into one; highlight the two entries click on the Merge button to display this window:



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

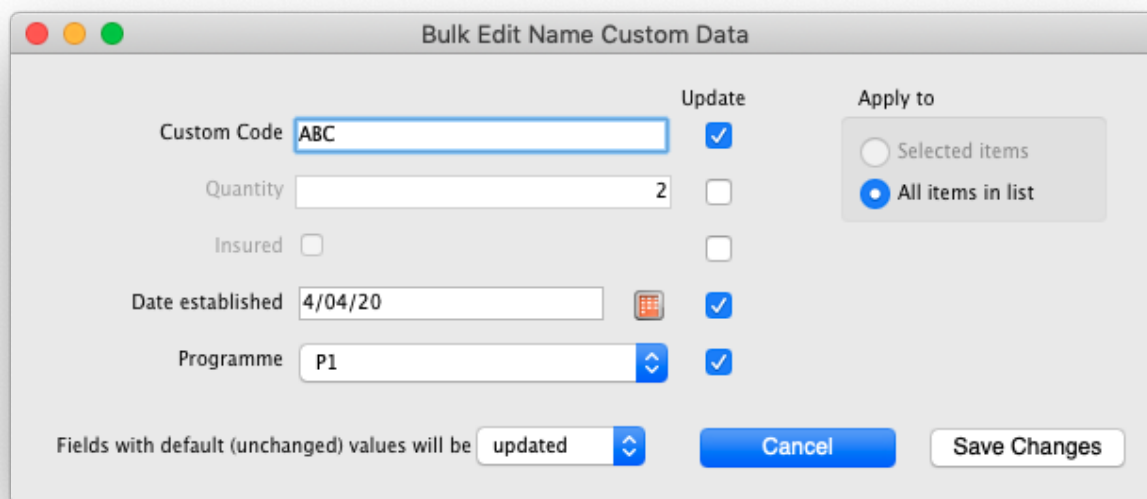
Clicking this button allows you to print address labels for the names in the list. The label editor is displayed.

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:



The dialog box is titled "Bulk Edit Name Custom Data". It contains several input fields and checkboxes. The "Custom Code" field is set to "ABC". The "Quantity" field is set to "2". The "Insured" checkbox is unchecked. The "Date established" field is set to "4/04/20". The "Programme" dropdown is set to "P1". To the right of these fields is an "Update" column with checkboxes: "Custom Code" is checked, "Quantity" is unchecked, "Insured" is unchecked, "Date established" is checked, and "Programme" is checked. Further right is an "Apply to" section with two radio buttons: "Selected items" (unchecked) and "All items in list" (checked). At the bottom, there is a label "Fields with default (unchanged) values will be" followed by a dropdown menu set to "updated". There are also "Cancel" and "Save Changes" buttons.

Field	Value	Update
Custom Code	ABC	<input checked="" type="checkbox"/>
Quantity	2	<input type="checkbox"/>
Insured	<input type="checkbox"/>	<input type="checkbox"/>
Date established	4/04/20	<input checked="" type="checkbox"/>
Programme	P1	<input checked="" type="checkbox"/>

Fields with default (unchanged) values will be updated

☐ Selected items
☒ All items in list

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.

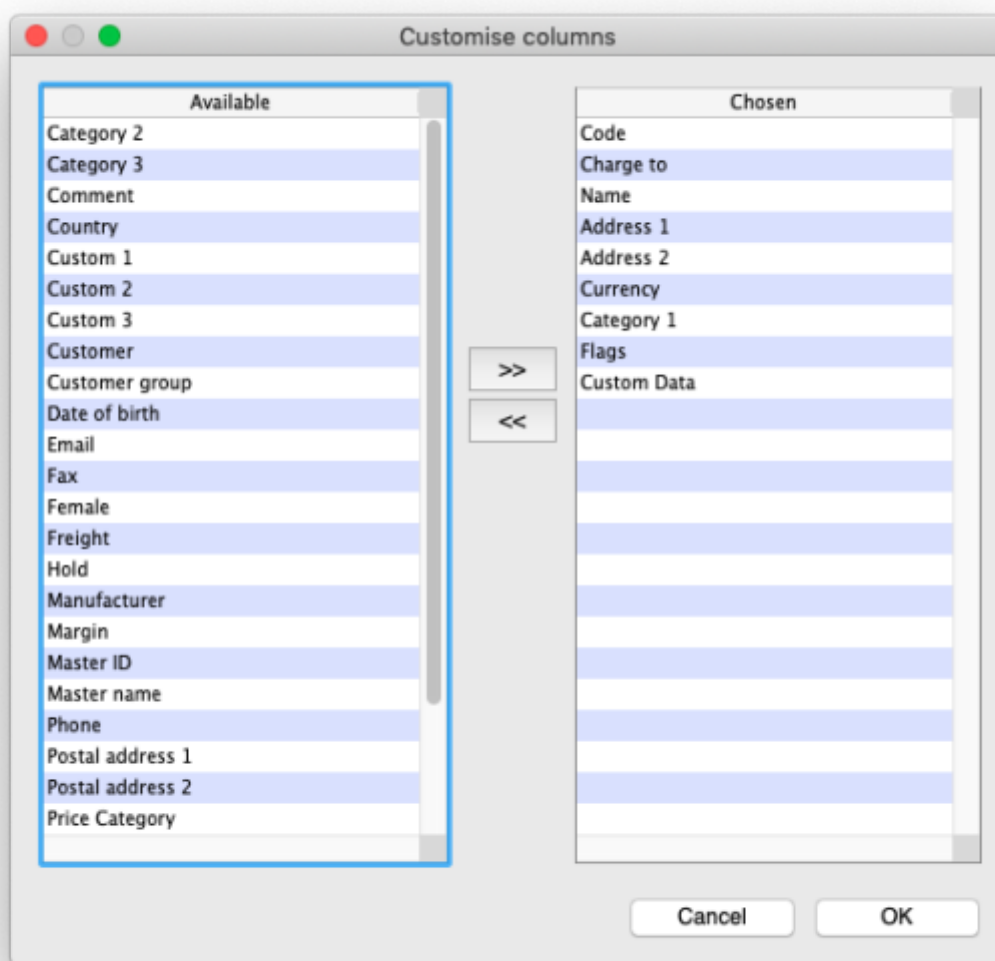
Click "Save changes" to apply. After confirmation and processing, you will see your changes reflected immediately in the *Custom Data* column of the names list. It is recommended that you have the *Custom Data* column displayed (see **Customise** below) before bulk editing custom data so you can clearly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



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:

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.



The **Main/Billing Address** fields will be disabled and not editable if the name belongs to a store. To edit these fields, do that on the store record. See the [26.07. Virtual stores](#) page for details about this.

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.

Edit customer/supplier

Store: District Sanitaire...

Overpayments: 0.00

Total outstanding: 848,324.60

Filter: All

Ageing

Ty...	St...	Entry dt	Confirm dt	inv num	Their ref	Comment	Total	Currency	Total (local c...	Outstanding
ci	sg	18/03/2020		7		Web order:	0.00	XOF	0	0.00
ci	fn	06/06/2019	06/06/2019	20		Facture d...du client	0.00	XOF	176725	0.00
ci	fn	06/06/2019	06/06/2019	23		Facture d...du client	0.00	XOF	0	0.00
ci	fn	06/06/2019	06/06/2019	24		Facture d...du client	0.00	XOF	0	0.00
ci	fn	17/06/2019	17/06/2019	125		Facture d...du client	0.00	XOF	0	0.00
ci	fn	26/06/2019	26/06/2019	175		Facture d...du client	0.00	XOF	0	0.00
ci	fn	12/07/2019	12/07/2019	239		Facture d...du client	0.00	XOF	0	0.00
ci	fn	12/07/2019	12/07/2019	240		Facture d...du client	0.00	XOF	134680	0.00
ci	fn	15/07/2019	15/07/2019	244		ALLOCA...EMENT)	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		PMLS_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		MEDICA...INTRANTS	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		COMPLE...TION 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		MEDICA...NTS PNLP	0.00	XOF	0	0.00
ci	fn	10/09/2019	10/09/2019	550		MEDICA...NTS_PNLP	0.00	XOF	0	0.00
ci	fn	10/09/2019	10/09/2019	551		MEDICA...TS_PNSME	0.00	XOF	0	0.00
ci	fn	09/09/2019	11/09/2019	542		MEDICA...INTRANTS	296,199.60	XOF	296199.6	296,199.60

OK & Next Cancel OK

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.

Customer invoice

Name: [Patient name] Confirm date: 17/12/08 Colour: Black

Their ref: 102824 CS04 Period: 01/01/08 - 31/12/08 Invoice: 3,040

Comment: tuesday order Category: None Entry date: 16/12/08

Goods receive ID: 0 Status: cn

New line Delete line(s) Backorders History Entered by: Pharmacy assistant

Store: General

General	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
2	NON	Gauze swab 8ply 10cmx10cm	3 1 4.58 13.76
3	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 WVA0602 26/11/09 0.00 0.00
7	LTE	Chlorhexidine 1% solution (mL)	1 5000 80356 30/03/12 0.00 0.00

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

Hold Finalize Export batch: 0 OK & Next Delete OK

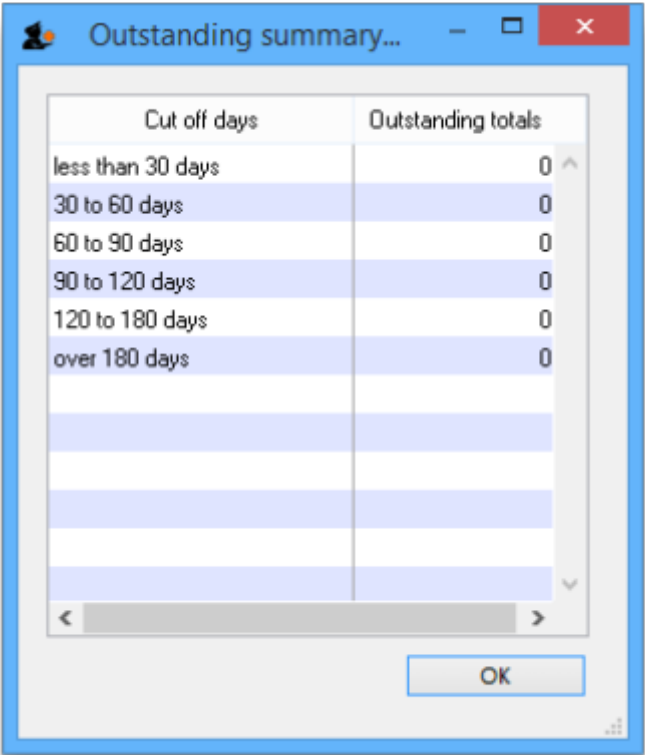
Buttons on the Invoices tab

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

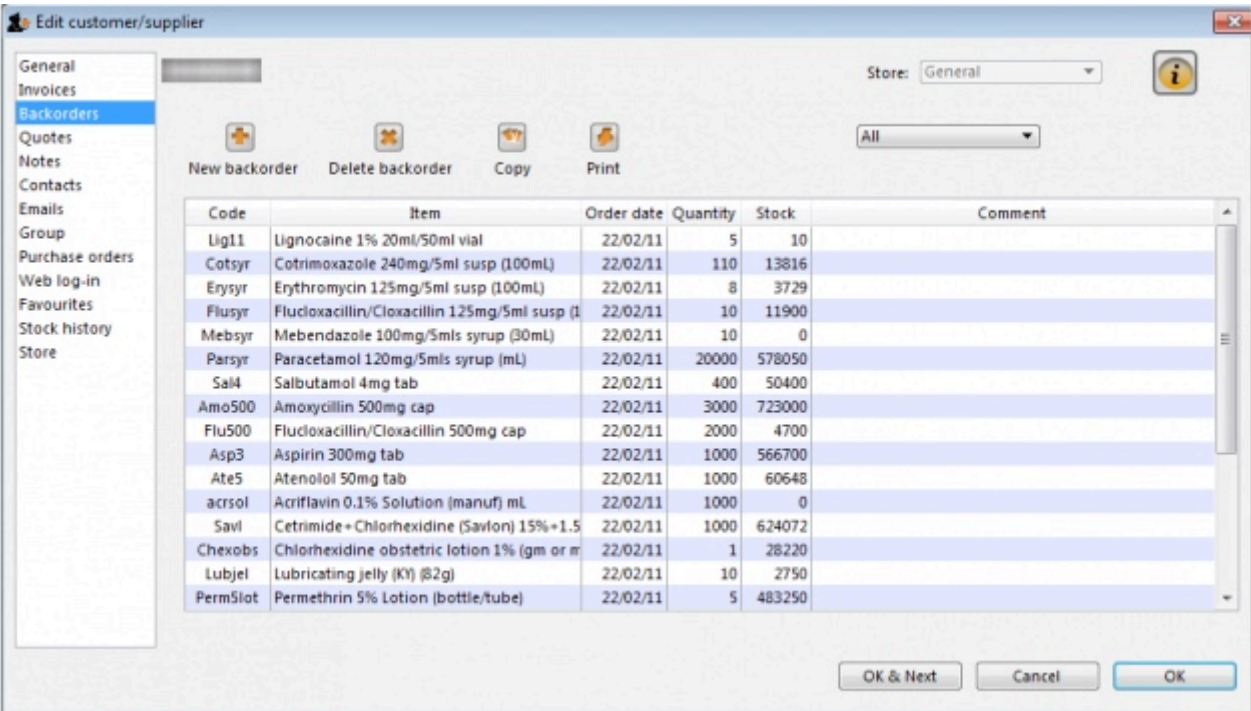
Click this button to display a list of aging categories and the outstanding unpaid balance for each invoice in each category.



Dates

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

Backorders tab

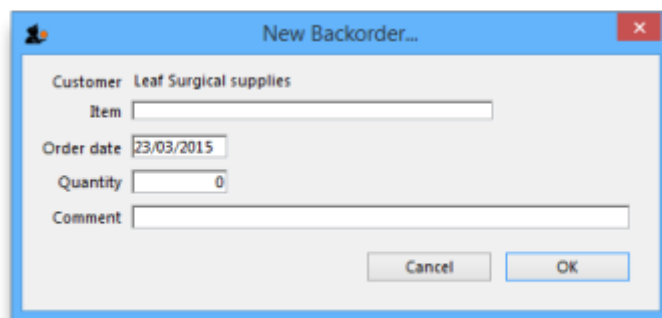


- Here you can view, add and edit the backorders for a customer. mSupply allows entry of backorders against suppliers as well, but we are not sure why you would want to do this!

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.



- 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.

Copy

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.

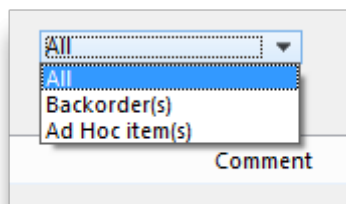
Viewing backorders

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

you can change any details you wish.

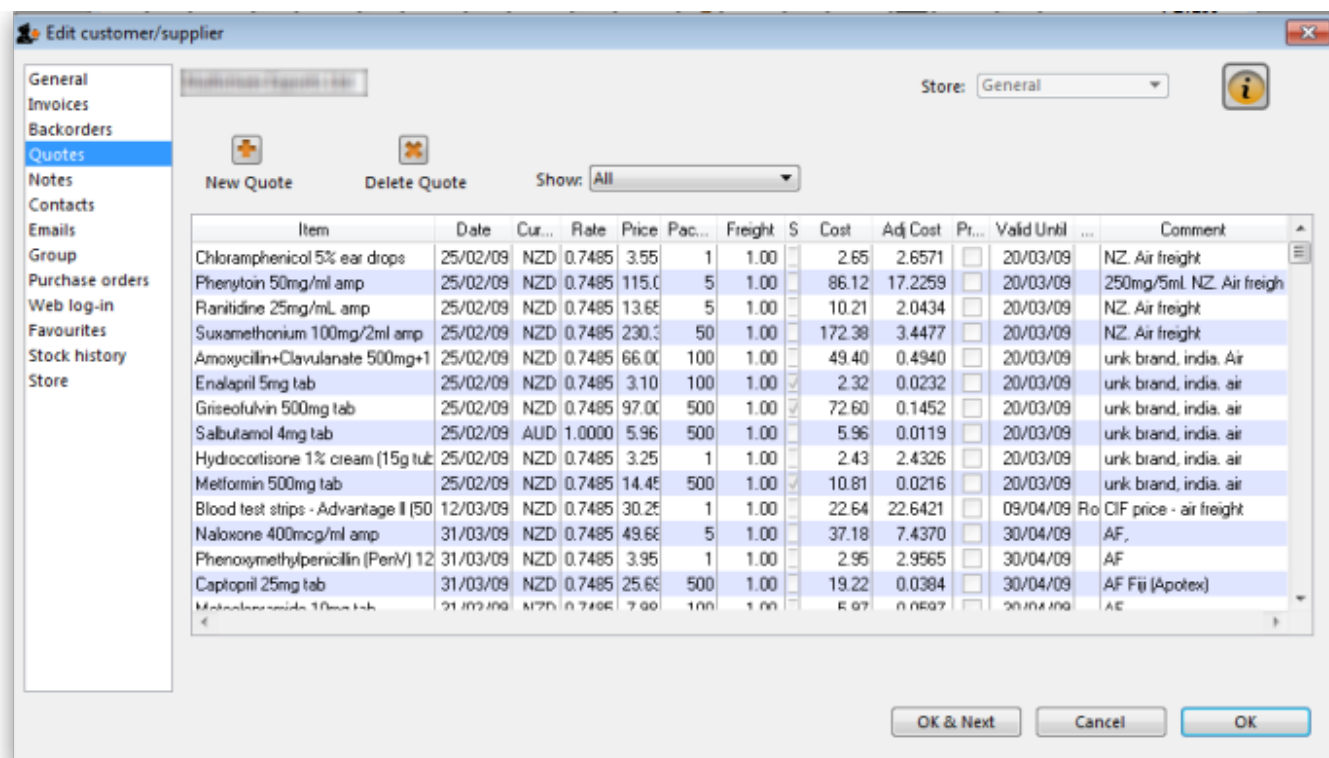
Show

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.

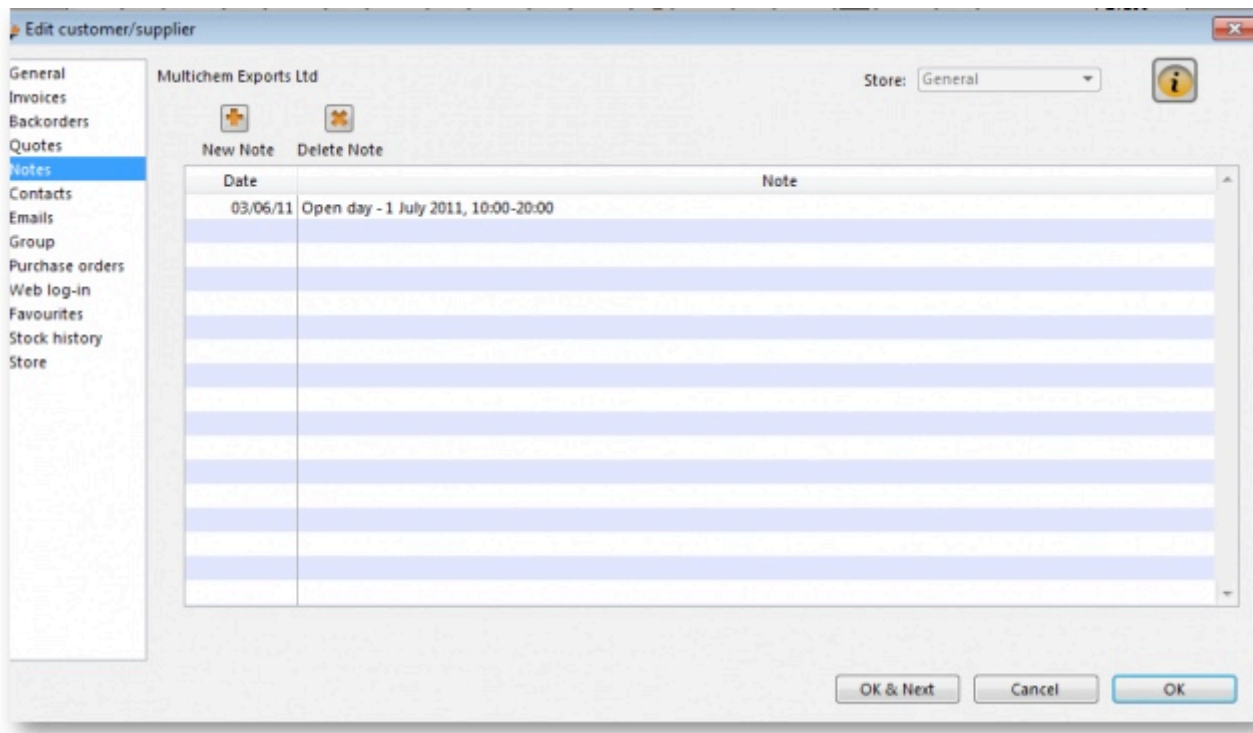
Quotes tab



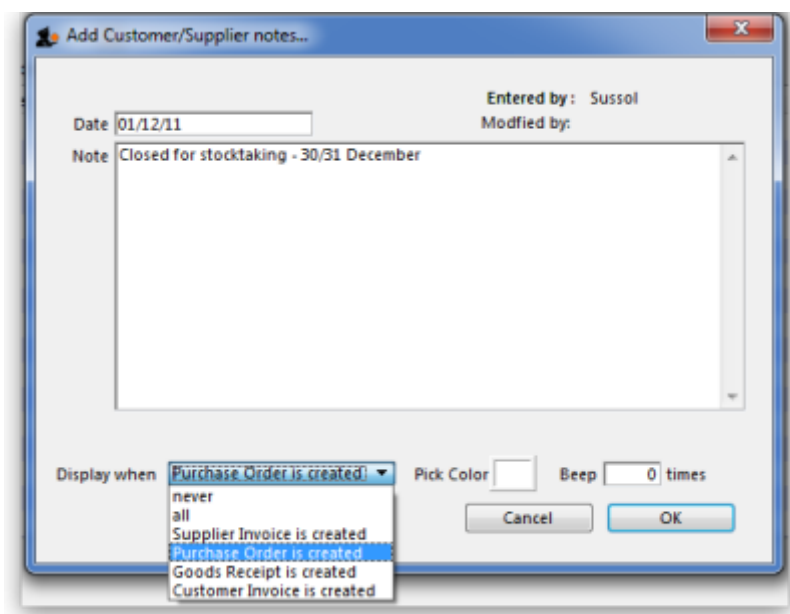
You can view the quotations you have entered in mSupply for this supplier.

Notes tab

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



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



- 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.

Add a contact...

Last

First

Position

Phone

Email

Address 1

Address 2

Country

Comment

Category

Category 2

Category 3

Info if related to a customer or supplier....

Name

Web Login

☐ Can login to the web interface

Username

Password

Cancel OK

- 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

Edit customer/supplier

London Dispensary

Store: General

Customer group: none

Item departments which can be supplied to this group.

Item departments

Warning: setting a customer group can affect which items can be supplied to them

OK & Next Cancel OK



Groups are only relevant to customers, not suppliers.

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...](#)

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

Edit customer/supplier

General

Invoices

Backorders

Quotes

Notes

Contacts

Emails

Group

Purchase orders

Web log-in

Favourites

Stock history

Store

International Dispensary Associatio

Store: General

Ord no

Status

Date

Lock

Target days

Lines

Comment

100	sg	17/12/08		0	2	NON-DRUGS IDA ORDER 1
123	cn	28/01/09		0	192	KIRDRUGTENDER 1
193	fn	24/06/09		0	110	Tender 09 part 2
325	cn	25/03/10		0	3	Controlled Drugs Order AF
291	cn	05/01/10		21	50	- Tender2010
358	cn	20/07/10		0	4	Drug Order July 2010 AF
404	cn	15/12/10		0	23	IDA Tender Order Air freight
410	cn	15/12/10		0	101	IDA Tender Order Sea Freight
424	sg	22/03/11		0	1	PO generated for tender number: 23 No of PO Lines 1
432	cn	30/06/11		0	2	

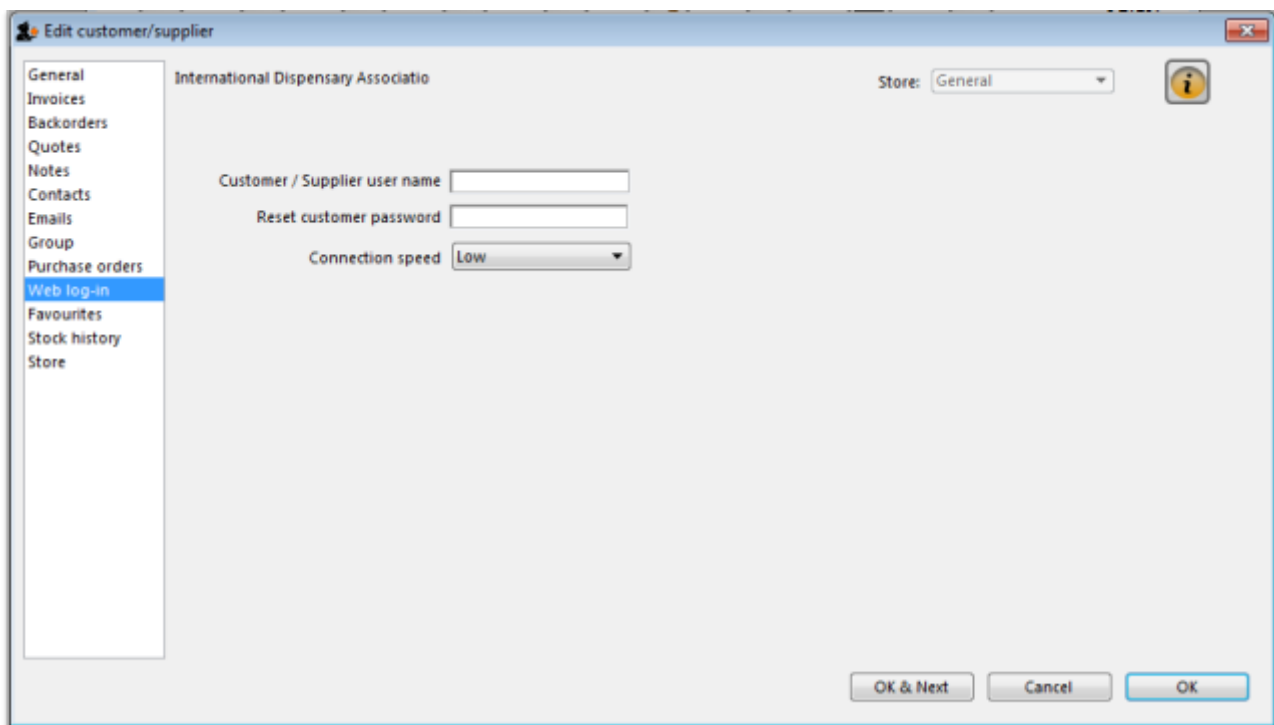
OK & Next

Cancel

OK

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

Web log-in tab



The screenshot shows a software window titled "Edit customer/supplier". On the left is a vertical menu with the following items: General, Invoices, Backorders, Quotes, Notes, Contacts, Emails, Group, Purchase orders, Web log-in (highlighted in blue), Favourites, Stock history, and Store. The main area of the window is titled "International Dispensary Associatio". In the top right corner, there is a "Store:" dropdown menu set to "General" and an information icon. The main area contains three fields: "Customer / Supplier user name" (a text input field), "Reset customer password" (a text input field), and "Connection speed" (a dropdown menu set to "Low"). At the bottom right of the window are three buttons: "OK & Next", "Cancel", and "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

General

Invoices

Backorders

Quotes

Notes

Contacts

Group

Purchase Orders

Item List

Requisitions

Store Visibility

Photo

Custom data

Log

mSupply Link

Tags

Edit customer/supplier

Norvic Department

Store: HQ Store

Default Order Days 0

Item lists attached to this name

Add master list

Delete list

List name	Master list	Imprest	Requisiti...	Web	Price
2025 Hospital EML	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hot Climate list	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Items

Item code	Item name
M0...002	Abacavir 120 + Lamivudine (3TC) 60 mg Tablet
01_1001	Abacavir 600 + Lamivudine (3TC) 300mg Tablet
03_0050	Acetazolamide 250mg tab
04_0720	Acetylcysteine Injection 200mg/ml
03-0066	Acetylsalicylic acid 100mg tablet
03_0072	Aciclovir (Acyclovir) 250mg vial
03_0073	Aciclovir (Acyclovir) 400mg tablet
06_0080	Aciclovir (Acyclovir) 800 mg tablet
06_...00	Acriflavine 0.2% solution
06_0078	Acyclovir 3% Tube (5g)
06_0079	Acyclovir 5 % cream
12_5846	Adenosine Injection 2mg/ml vial

Style

Sort by Group

Output to

☒ Printer

☐ Excel

Generate

Ordering method

☐ Imprest

☒ Stocktakes

OK & Previous

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.

Edit customer/supplier

Norvic Department

Store: HQ Store

Default Order Days: 0

Item lists attached to this name

Add master list Delete list

List name	Master list	Imprest	Requisiti...	Web	Price
2025 Hospital EML	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hot Climate list	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Edit master list

Description: 2025 Hospital EML

☒ Imprest ☒ Requisitions

☐ Ordering list for web ☐ Price list

Cancel OK

Items

Item code	Item name
M0...002	Abacavir 120 + Lamivudine (3TC) 60 mg Tablet
01_1001	Abacavir 600 + Lamivudine (3TC) 300mg Tablet
03_0050	Acetazolamide 250mg tab
04_0720	Acetylcysteine Injection 200mg/ml
03-0066	Acetylsalicylic acid 100mg tablet
03_0072	Aciclovir (Acyclovir) 250mg vial
03_0073	Aciclovir (Acyclovir) 400mg tablet
06_0080	Aciclovir (Acyclovir) 800 mg tablet
06_...00	Acriflavine 0.2% solution
06_0078	Acyclovir 3% Tube (5g)
06_0079	Acyclovir 5 % cream
12_5846	Adonocine Injection 2mg/ml vial

Style

Sort by

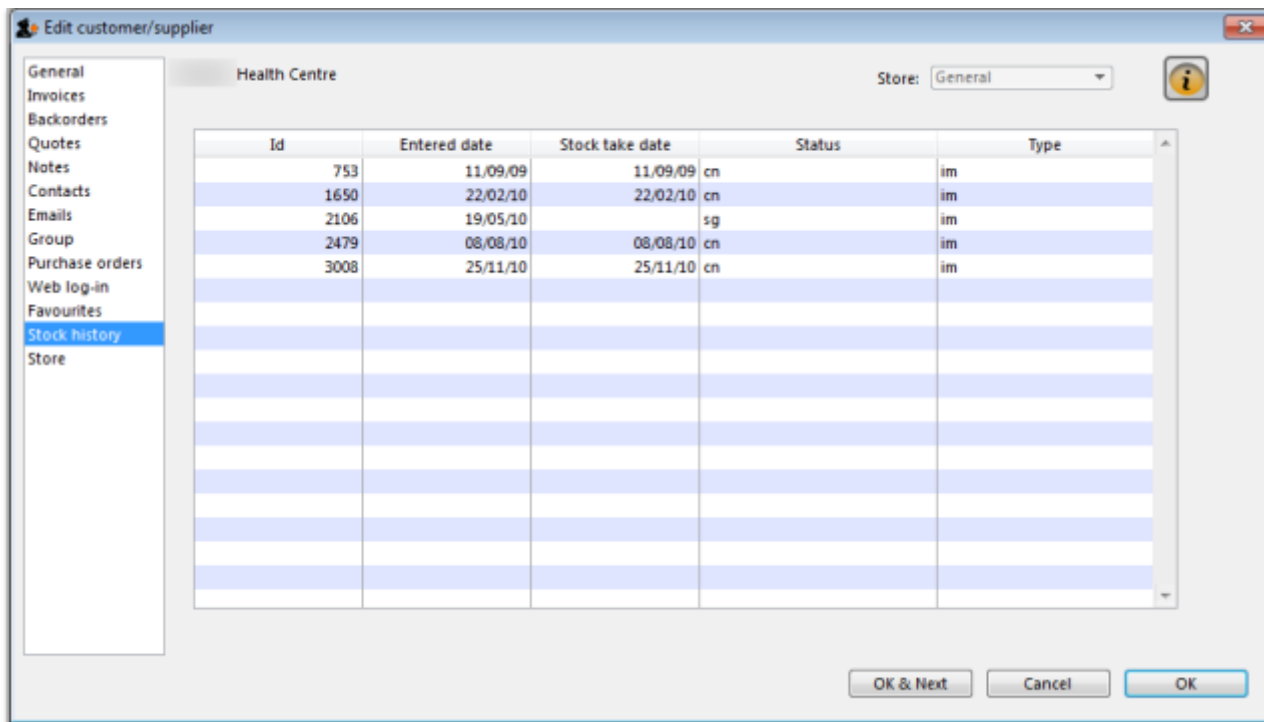
Excel Generate Stocktakes

OK & Previous OK & Next Cancel OK

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

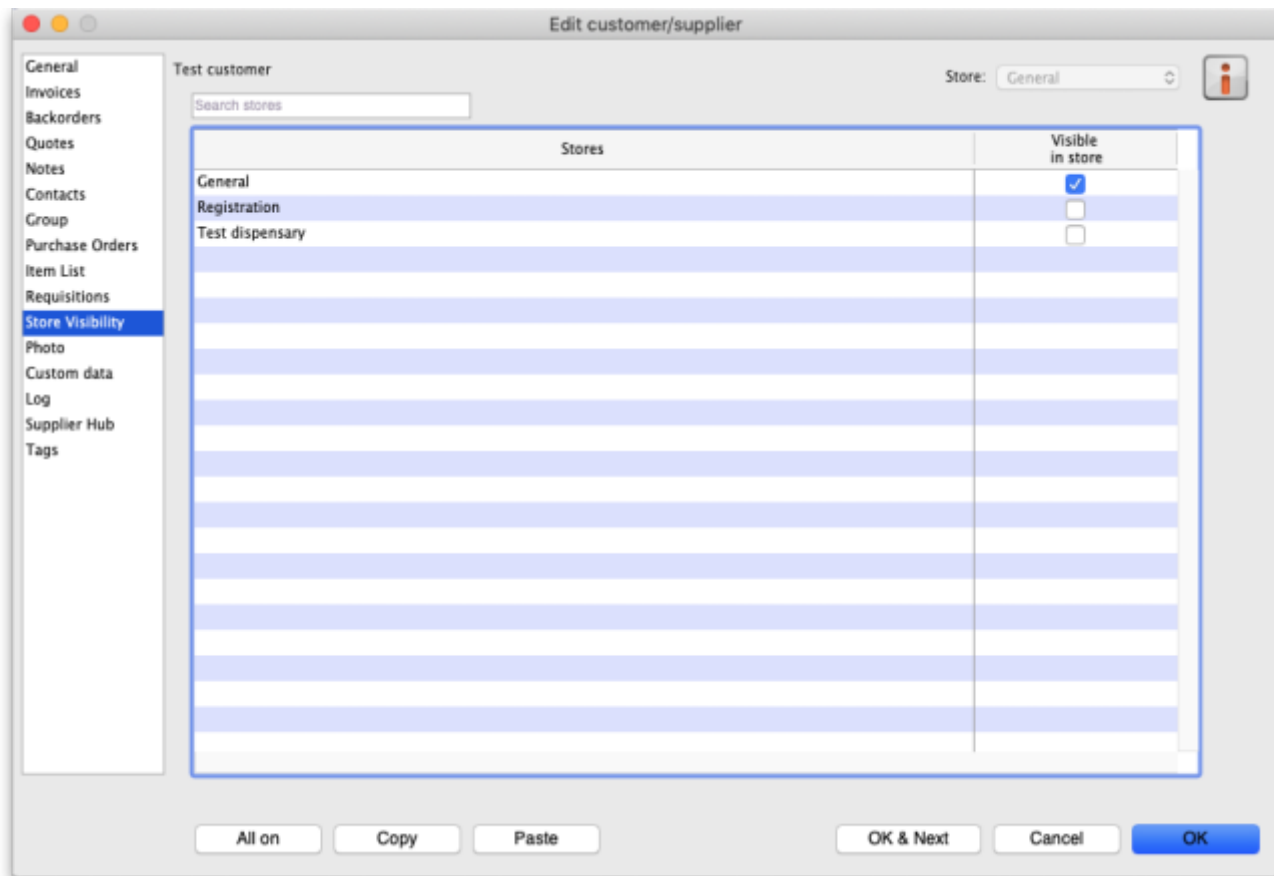


A list of stock histories, showing dates of both the stock take and the date of entry into the computer, the ID reference, the status and the type, is displayed.

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.



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.



- You can only edit the visibility of any name in another store if you have permission to login to the store *and* to edit name visibility in that store:
 - if you're just editing visibility in a single store, then an error dialog will popup and the state of its *Visible in store* checkbox will revert to its previous value.
 - **however**, when using the bulk **All on**, **Copy** and **Paste** buttons to update visibility in multiple stores, there is no error dialog and only the stores that you have permission for will be affected.
- If you edit the visibility of store name A in store B, then the visibility of store name B in store A will be updated to match i.e. inter-store visibility is always symmetrical.
- If you are using a [syncing](#) system, and editing visibility



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](#).

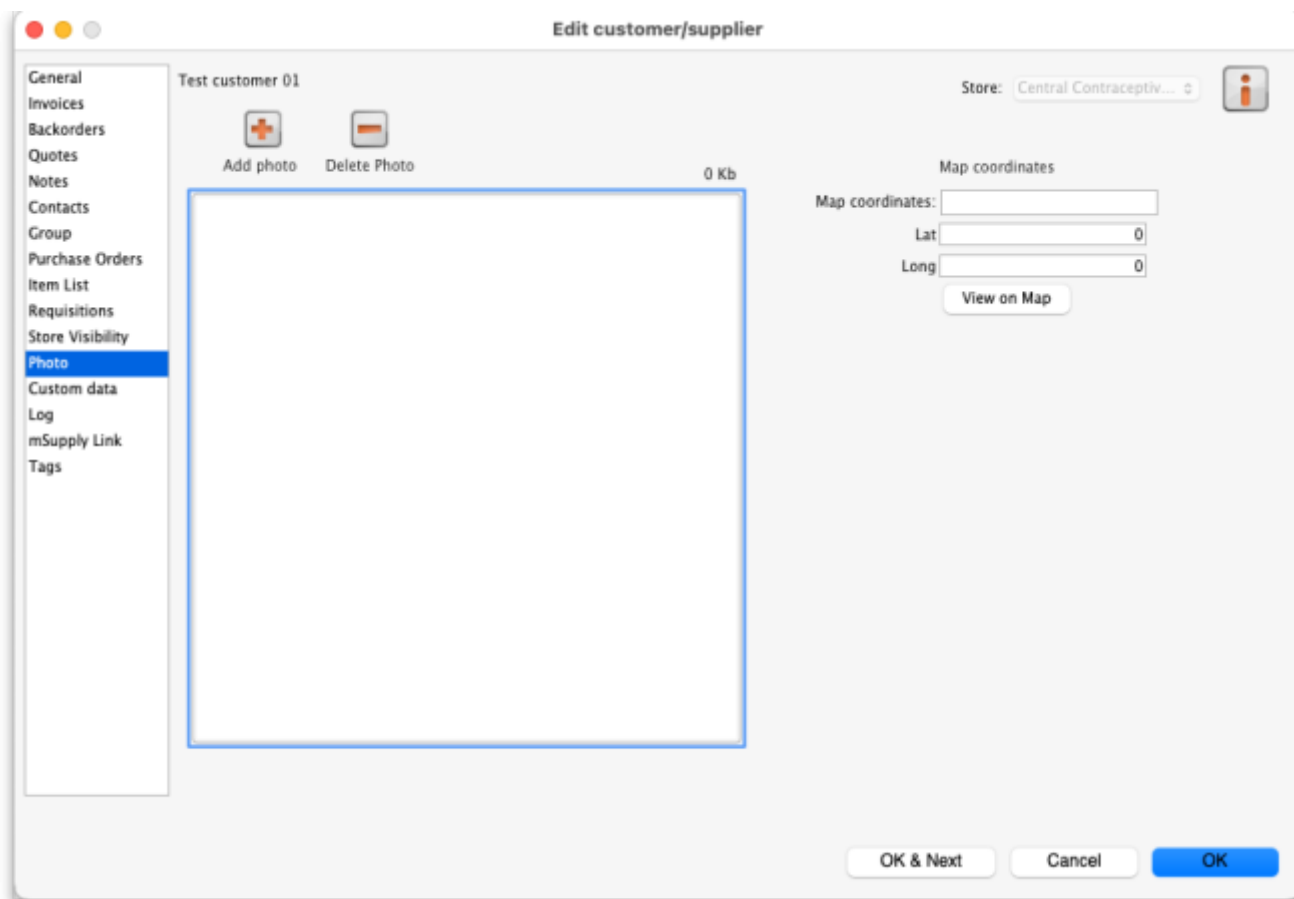
- In a [syncing](#) system, facility names (customers, suppliers, etc.) can only be created and edited on the primary server. [Patients](#) can be created in any dispensary, including on a sync site. After that, their visibility is controlled on the central server (after they sync there) in the same 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.



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.

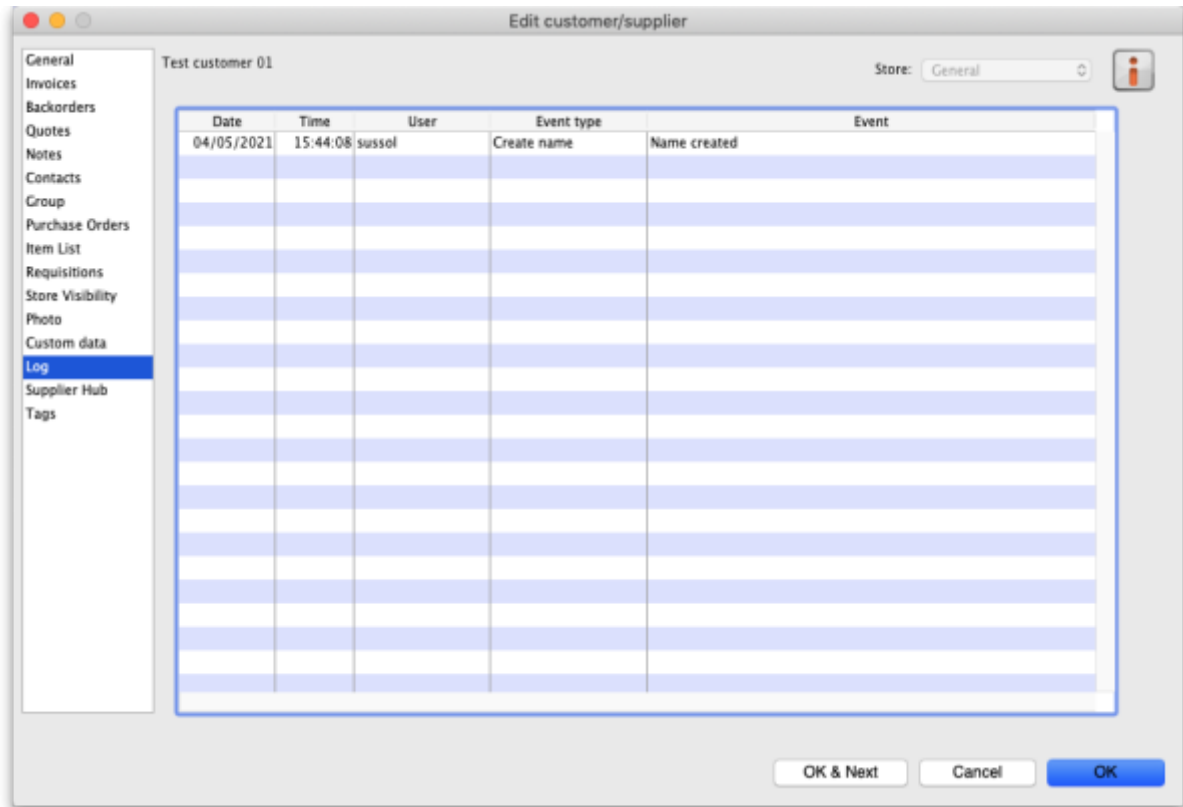
Custom data tab

The screenshot shows a software window titled "Edit customer/supplier". On the left is a vertical sidebar menu with the following items: General, Invoices, Backorders, Quotes, Notes, Contacts, Group, Purchase Orders, Item List, Requisitions, Store Visibility, Photo, Custom data (highlighted in blue), Log, Supplier Hub, and Tags. The main area of the window is titled "Test customer 01". In the top right corner of the main area, there is a "Store:" dropdown menu set to "General" and an information icon. Below the title, there are five custom data fields labeled "New field 1" through "New field 5". "New field 1" is an empty text box. "New field 2" contains the value "0". "New field 3" is a checkbox that is unchecked. "New field 4" contains the value "00/00/00" and has a small orange icon to its right. "New field 5" is an empty dropdown menu. At the bottom right of the window are three buttons: "OK & Next", "Cancel", and "OK".

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.

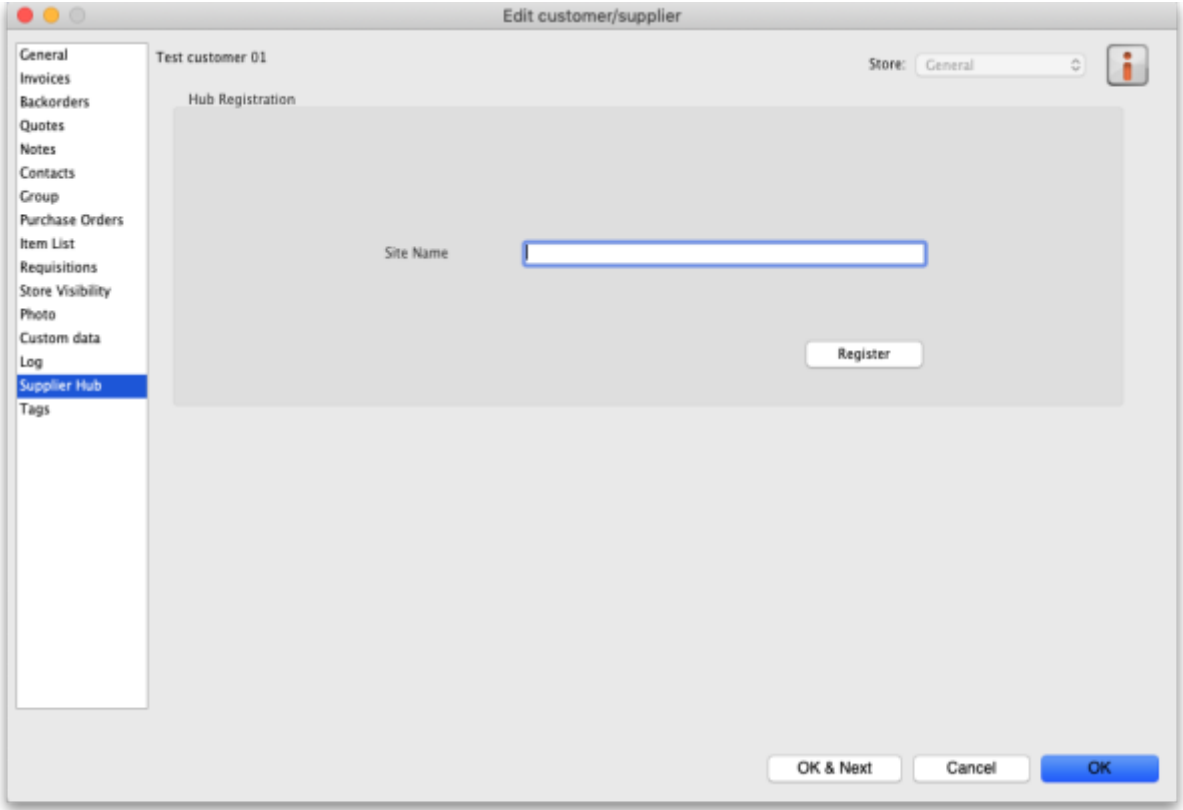
Log tab



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.

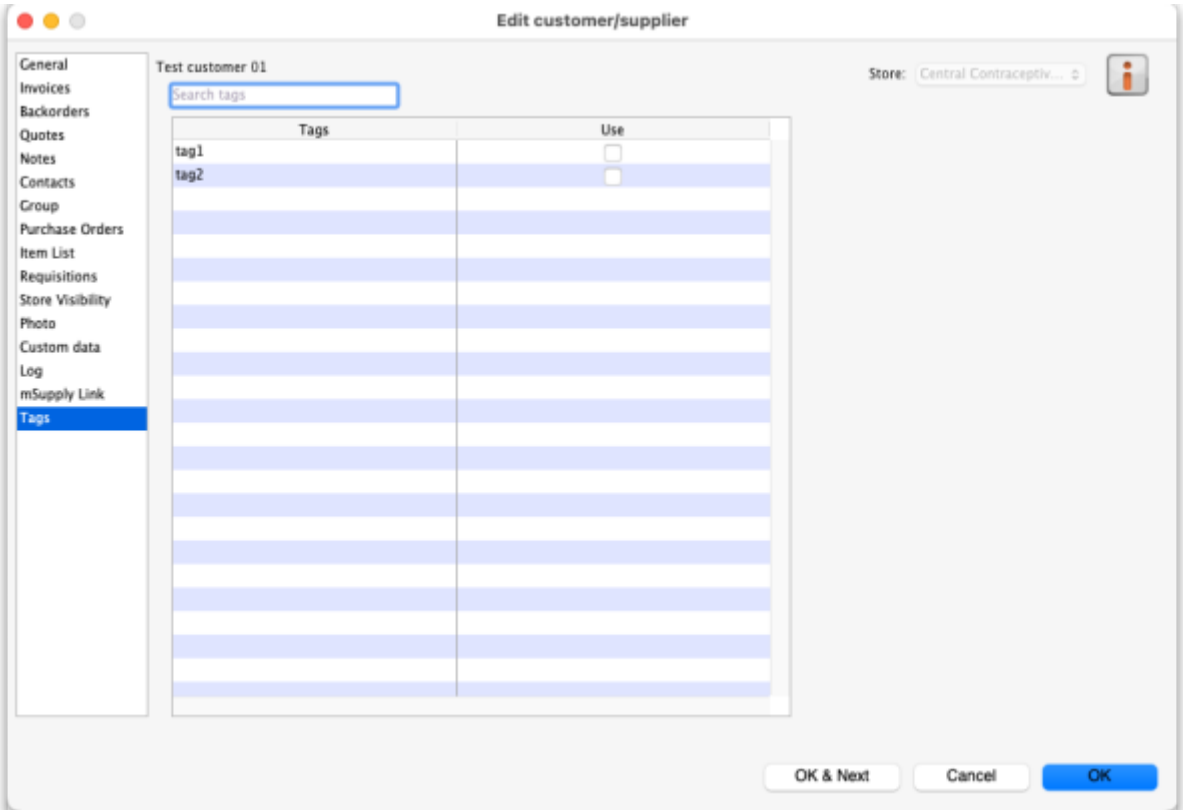
If you want to see more details about one of the logs, double-click on it in the list and a detail window, populated with the log's details, will open.

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.

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](#)

[update Name codes](#) 😊.

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.

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.

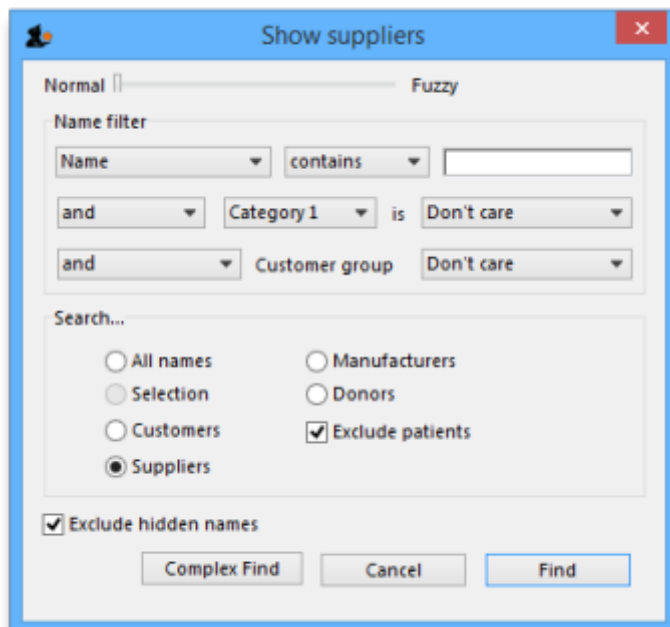
Margin: The amount (as a percentage) that will be added to the cost price to calculate the sell price when you enter an invoice. For example, if you enter “10”, items from this supplier that are bought for 30 dollars will have their value increased by 10% (i.e. 3 dollars) and will be sold for 33 dollars.

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.



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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