

## 4.04. Item master lists

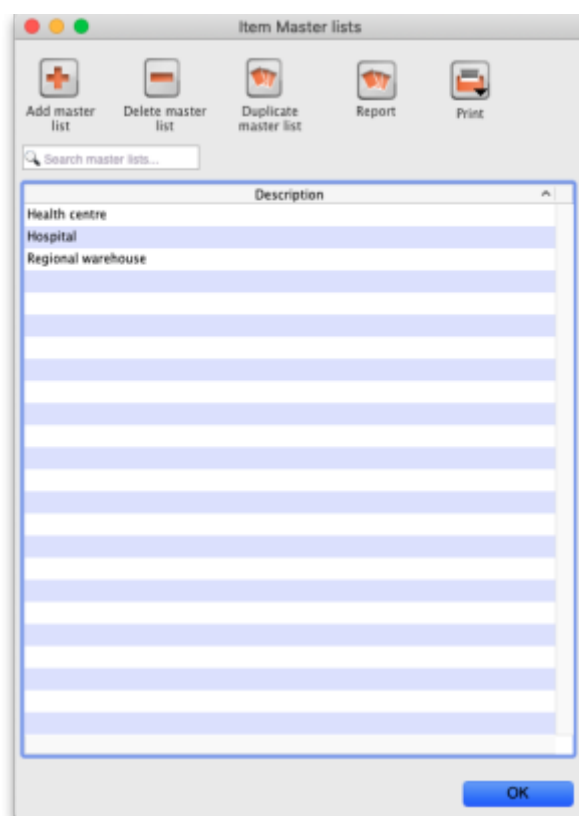
Updated: Version 3.1

Master lists are standard lists of items you would supply to wards, clinics, etc. on a regular basis. Once set up, a master lists can be assigned to customers or [Virtual stores](#), and then used to support [Stock Control](#) including [imprest](#) orders. Master Lists are useful to stores which have a number of customers or virtual stores that they supply whose lists of stock items are either identical or very similar.

Choosing the **Item > Show item master lists...** menu item or clicking on the *Show master lists* icon



on the *Item* tab of the navigator displays this window:



### Adding (and importing) a master list

Click on the *Add Master List* button and you are presented with this window:

[illegible]

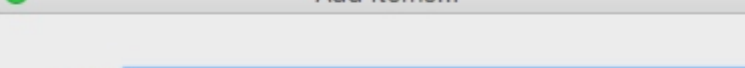
*Description* field: Enter the name of the master list here - this is the list name that everyone will see e.g. Health Posts - Standard List.

Note field: Add any note or information here that will help you and others understand what the list is for.

*Automatically add new items to this master list* checkbox: If you check this, any new items created, whether manually or during import, will be added to the master list. This is a particularly helpful setting when you are using master lists to [control the visibility of items in stores](#).

The *Items* tab shown in the screenshot shows the list of items on the master list. The *In use by* tab shows which customers the master list has been assigned to (see below).

You then populate the list with the required items by clicking the *Add Item* icon:



On entering the first few characters of the item to be ordered and pressing the Tab key, the (by now!) familiar list will appear from which the desired item is selected by double clicking.

If the imprest system is used in your organisation, the quantity is entered in the *Imprest Quantity* field. If the imprest system is not being used, you don't have to enter anything in this field.

If you want this list to determine the price of this item for customers using it, the price is entered in the *Price* field. If not, no entry is required in this field.

In our example, a number of master lists have been created. A sample Health Posts - Standard List master list is shown below.

[illegible]

**Sorting:** Clicking on any of the column headings allows you to sort the list according to that heading; you also have the ability to click on an item in the list, and drag it to a new position; once the list is sorted to meet your requirements, you can click on the *Save Sort Order* icon, and mSupply® will

retain the list in the order in which you have set it, and display it in that order next time it is accessed.

**Copy to clipboard:** The master list is copied to the clipboard when this button is clicked so that you can paste it into other applications on your computer e.g. a word processor or spreadsheet application.

## Import item list

You can import a list of items created elsewhere e.g. an accounting application or a spreadsheet. This can save you a lot of time! The file to be imported must be tab delimited text and must contain, in this order:

- **Item code** Must match an existing item code
- **Item name** For information purposes only and is not actually imported. You can leave a blank column in its place if you like)
- **Imprest quantity** Optional and can be left blank. You would leave it blank if the master list is not going to be used for an imprest.
- **Price** Optional and can be left blank. You would leave it blank if the master list is not going to be used for pricing

Records in the file are, of course, separated by the end of line character.

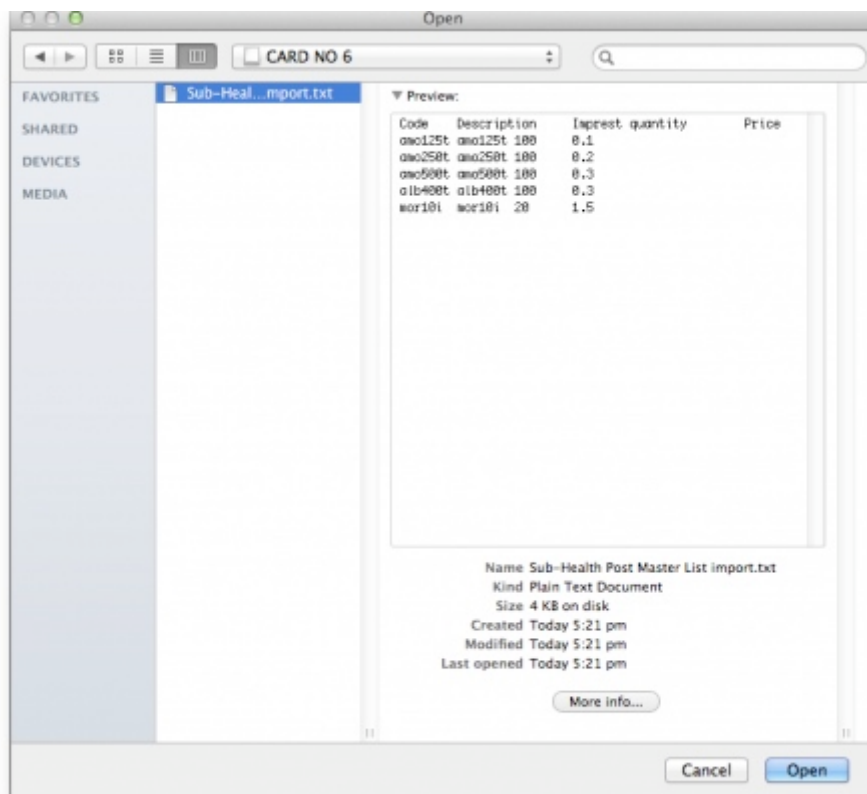
For example:

Item code	Item name	Imprest quantity	Price
amo250t	amoxycillin 250mg tab	800	4.50
amo500t	amoxycillin 500mg tab	300	5.50

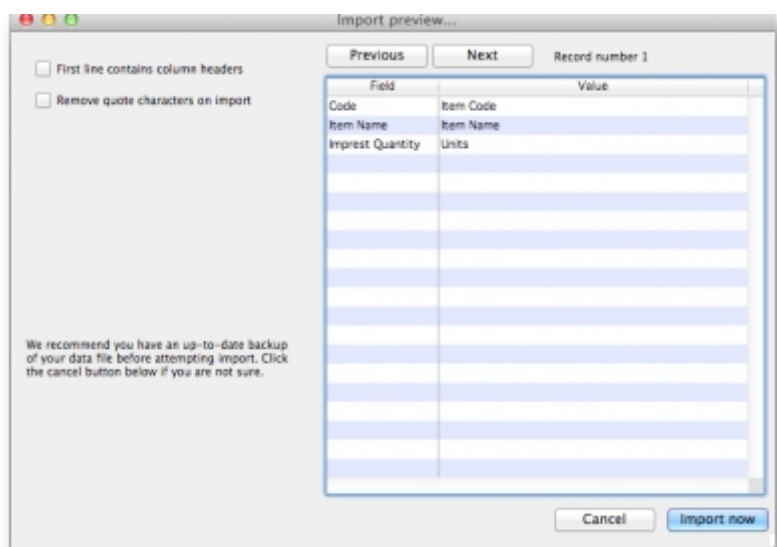
Clicking on the *Import item list* button takes you to a prompt:



after which you can select the file:



And then the import preview dialogue box is displayed:



On this screen you use the *Next* and *Previous* buttons to move through the records and see what details will be imported for each. The *First line contains column headers* tells mSupply whether to ignore the first record in the import file (checked = ignore first line of file). The first record in the import file often contains headers describing the fields in each record, not actual data.

The *Remove quote characters on import* checkbox, if checked, tells mSupply® to strip all “ characters from the data. This is recommended. In fact, this option can be selected anyway without detriment to the import.



Any new items on in the import are added to the end of the



master list, nothing is overwritten by the import.

Clicking the *Import now* button executes the import with the settings you made and takes you back to the master list screen with the imported items now showing in your master list.



If you import items that are already on the master list, they will not be added to the end of the list. The existing entries will have their **Imprest Quantity** and **Price** details *updated* with the imported values.

The *Cancel* button also takes you back to the master list screen but, obviously, does not execute the import.

**Editing imprest quantities or price:** If you click once on the row you wish to edit, and then click on the imprest quantity or price, it becomes editable. Enter the new value, and you can then use the <tab> key to advance to editing the next imprest quantity or price field.

**The *In use by* tab:** Under this tab you'll find the list of customers who have been assigned to this master group (i.e. are using this master list).

## Deleting a master list

From the *Item Master lists* window, selecting the *Delete Master List* icon allows you to delete a list which is no longer required. **This action has significant consequences for any customers who are users of the list. So to prevent accidental deletion, this action cannot be completed until any customers who are users of it have their association with it removed.**

## Duplicating a master list

Should you wish to create a Master list which is very similar to an existing one, click on this icon, and a new Master list entitled ` *Duplicate of .....` is created; this can then be edited and renamed to suit your requirements.*

## Creating a re-ordered master list

You may need to create a new master list which is similar to an existing one, but with significant changes, including, particularly, changing the sort order.

### Small master list:

If this is a small list, this is relatively easily achievable by:

1. Select 'source' master list
2. Duplicate it to the new master list
3. Add any new items to the temporary master list
4. Re-organise the list to the desired sort order

### Large master list:

However, if the list is a long one, then the re-organising can be extremely tedious, especially over a dodgy internet connection to the Primary server (editing master lists must happen on the Primary Server)! This is best achieved by:

1. Select 'source' master list
2. **Duplicate** it to a temporary master list
3. Add any new items to the temporary master list
4. **Copy to clipboard** (using button)
5. Open a blank Excel sheet and Paste the clipboard in to cell A1
6. Delete the first four lines in the spreadsheet
7. [Filter](#) the table of data
8. Do the necessary edits including any re-ordering
9. Save as a tab separated values text file
10. Back in mSupply, create your new master list from scratch (**Add master list** button).
11. **Import master list** (using button)
12. Once you've verified that it worked the way you wanted it to, **Delete** the temporary master list

### Re-order existing master list

This method can even be used to effectively re-order an existing master list, but be careful; stop any syncing if in a synced system, and take a backup of your datafile before embarking on this:

#### Method 1:

1. Stop syncing (if in a synced system) and make a backup.
2. Create your new, correctly ordered master list as described above.
3. Assign this list to all the same names as the original master list was assigned to.
4. Unassign the original master list to all names
5. Delete the original master list
6. Rename new list

#### Method 2:

1. Stop syncing (if in a synced system) and make a backup.
2. Create the tab delimited text file for your new, correctly ordered master list as described above.
3. Delete all but one of the items on the original master list. This one item is ideally the item that will be at the 'top' of the reordered list.
4. Import the tab delimited text file to the original master list.

This is scarier (deleting items of master lists is a big deal), but avoids the need for steps 3 - 6 of Method 1.

## Assigning a list to a customer

To assign a list to a customer, the customer's details need to be on screen; Choose **Customer > Show customers**, or using the Navigator, select *Show customers*, fill in the appropriate details, and press *Find*, or just press *Find*, then double click the entry required on the *Names list*

Once the desired customer's *Edit Customer/Supplier* window appears click on the *Item Lists* tab.

The screenshot shows the 'Edit customer/supplier' window with the 'General' tab selected. The left sidebar contains a list of tabs: General, Invoices, Backorders, Quotes, Notes, Contacts, Group, Purchase orders, Item lists, Stock history, Store, and Photo. The main area contains several sections: 'Example1' with fields for Name, Code, Charge to, Master ID, and Master name; 'Contact' with fields for email, web site, phone, and fax; 'Status' with a 'Hold' checkbox and 'Price Category' dropdown; 'Customer details' with 'Supplying store' dropdown and 'Print invoices alphabetically' checkbox; 'Category' section with checkboxes for Customer, Supplier, Manufacturer, and Benchmark; 'Other' section with dropdowns for Category 1 through 6 and a 'Flag' field; and address sections for 'Main/Billing Address', 'Postal address', and 'Shipping address'. At the bottom are buttons for 'Delete name', 'OK & Next', 'Cancel', and 'OK'.

### Buttons in the Item Lists section:

- **Add Master list:** From the list of master lists which have been created, double click on the name of the desired list.
- **Add Local list:** This serves to cater, for example, for the situation where a patient with a rare disease requiring medicines not normally stocked, collects these medicines from the local Health Centre. In this example, a patient attending London Dispensary requires tetracosactide, and so a local list (London local) has been created with a single entry, *Griseofulvin*

The screenshot shows the 'Edit customer/supplier' window with the 'Item Lists' tab selected. The left sidebar is the same as in the previous screenshot. The main area shows the 'Medical Care' section. Under 'Item lists attached to this name', there are four buttons: 'Add master list', 'Add local list', 'Copy from master list', and 'Delete list'. Below these buttons is a table with the following columns: 'List name', 'Master list', 'Imprest', 'Stock Takes', 'Web', and 'Price'. The first row in this table is 'Health Pos...List-[local]'. To the right of this table is the 'Items' section, which has three buttons: 'Add item', 'Delete Item(s)', and 'Save Sort order'. Below these buttons is a table with the following columns: 'Item name' and 'Price'. The first row in this table is 'Griseofulvin 250mg tab/cap'.

- **Copy from Master list:** This feature would normally be used where a specific customer's drug needs differ to a minor degree from the drugs listed in one of the Master lists, or under the Imprest system where the stock levels are different from those defined on a Master list; first

click on the *Add Master list* icon, select the appropriate Master list, add it, and it will appear under List name. With that list highlighted, click on the *Copy from Master* icon, and a new entry appears displaying the name of the Master list followed by '(local)'. The Master list may then be deleted, and the local copy modified and renamed as appropriate.

- **Delete list:** Two distinct functions are performed, depending on whether a Master list or a Local list is selected
  1. if applied to a Master list of which the present customer is a member, it has the effect of removing that list from this customer's Favourites. The Master list remains in mSupply.
  2. If applied to a Local list, it allows deletion of the list, but only after all the items have been removed from the list by making use of the *Delete Lines* feature.
- **Add item:** Once you have selected a list, this allows you to add an item to that list.



You can only add items to a local list. If there are no buttons visible above the item list, it is because you don't have any local lists for this customer (or if you do, you haven't clicked on that local list to highlight it first)



When operating multiple stores in mSupply, you can sometimes have difficulty with item visibility: an item might be on a master list for a particular customer but if the item is not visible in the store you are logged into when using the list, then the item will not appear.

A temporary fix can be achieved by setting the item visibility in a particular store to match an item list - refer the [Visibility tab](#). This is only a temporary fix. If you add a new item to a master list, the visibility of that item in the stores using that list will not be updated.

To avoid this problem, you can set a preference (see [here](#) for details) to have the visibility of items on lists altered to match the visibility of the name for which the lists are made.

- **Printing:**

- Before printing, choose either *Sort by Group* or *Sort by department*
- Choose whether to send to Excel® or your printer.
- Click **Generate**

#### Buttons in the Items section:



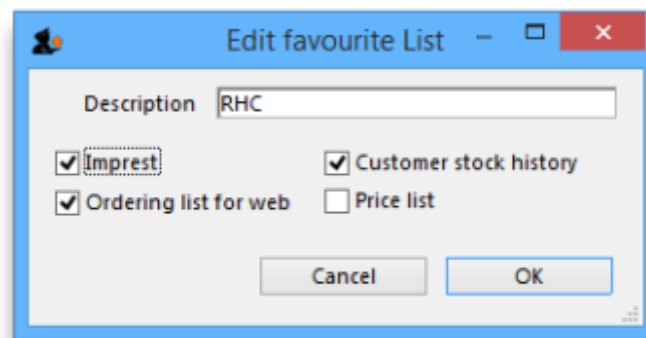
These icons appear only when a local list is selected; for obvious reasons, Master lists cannot be edited here.

- **Add Item** Self explanatory! Allows you to add required lines to the local list.
- **Delete Item(s)** Lines may be deleted, either singly or, by selecting multiple lines, they may be deleted together.
- **Save sort order** Allows you to save the list according to how you have sorted it here.

### Information button

### Edit list properties

The attributes of a list are set by double clicking on the name of the list. This window is displayed:



The options should be checked as appropriate:

- **Imprest:** If checked, this list will populate an [imprest customer stock history](#) created for the customer.
- **Customer stock history:** If checked, this list will populate a [customer stock history](#) created for the customer.
- **Ordering list for web:** Means that the list represents all items that the customer can order using the [mSupply Customer interface](#). If a customer who uses the customer interface for ordering stock does not have a list with this option checked, they will not be able to order any items.
- **Price list:** Means that the prices on this list will be used for these items when they are being distributed to this customer on a customer invoice. The price on this list will override any sell prices that individual stock lines have. Only one list can have this option checked for each customer.

## Using master lists to control item visibility in stores

You can use master lists to control item visibility in each store. This will make the items visible in each individual store match exactly the items included in the master list(s) selected for that store.



**Control of item visibility by master list can have drastic unintended consequences!  
It affects ALL stores in the system.**



- Do not turn it on unless you know what you are doing!

One unintended consequence: An mSupply store can only order from another mSupply store those items that are on master lists which have been assigned to *both* stores.

For example:

**Central store** has the following master lists assigned:

- **All items** (includes all items in the system)
- **HIV items**



**Kathmandu store** has the following master lists assigned:

- **HIV items**
- **TB items**

**Kathmandu store** tries to place order from the **Central store** for:

- Items on the **HIV items** master list. This succeeds, because both stores have been assigned the **HIV items** master list.
- Items on the **TB items** master list. This **fails** because the **TB items** master list has not been assigned to the **Central store**, *even though* the TB items are all included in the **All items** master list .

## Procedure - item visibility

For example, let's say there are 100 stores, and you want all of them to have the same item visibility:

1. Create a master list and add some items
2. Go to each store and make sure that the master list is selected
3. Turn on the [preference](#):

**Automatically update item visibility in all stores to match master lists used by each store**



A temporary list is created for each store containing items that cannot be removed from visibility when the master list preference is activated, normally because there is stock of the item in the store.

4. Now whenever an item is added or removed from this master list, the preference will automatically update the visibility for all of the 100 stores, so that the items visible for each individual store matches the items included in the master list.
5. Adding an item to a master list will automatically add that item to visibility for all stores using that master list

6. Deleting an item from a master list will automatically remove that item from visibility for each store using that master list, given it is not included in another master list in use by each store respectively.



When deleting items from a master list, mSupply will first check all stores using the master list to make sure it is safe to remove that item. It is unsafe if the item has *stock on hand* and *isn't included in another master list* for any stores using master list you are editing.



If you've been running your mSupply for some time without controlling item visibility by master list and you now want to move to it, you will likely want to start by creating a master list containing **ALL items** and applying visibility to all existing stores according to that **ALL items** master list. Then, over time, different master lists can be created and applied to those existing stores.

To create a **ALL items** master list, you can export all items, and then import them to the master list, refer [above](#).

Previous: [4.03. Item categories](#) | | Next: [4.05. Programs](#)

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