



# User Guide

---

## 1. About mSupply

- 1.01. Introduction
- 1.02. Why mSupply?
- 1.03. Who uses mSupply?
- 1.04. Which combination of mSupply products best suits your organisation?
- 1.05. Terms, definitions and conventions used in this user guide

## 2. Setting Up mSupply

- 2.01. Requirements
- 2.02. Installation
- 2.03. Starting mSupply for the first time
- 2.04. Client/Server FAQ

## 3. Tutorial

- 3.01. The tutorial like no other
- 3.02. Logging in
- 3.03. Opening the example data file
- 3.04. Navigator
- 3.05. Creating and viewing items
- 3.06. Customers and suppliers
- 3.07. Viewing Names in Google Maps
- 3.08. Enter incoming goods (supplier invoices)
- 3.09. Enter outgoing goods (customer invoices)
- 3.10. Entering quotations
- 3.11. Working with lists
- 3.12. Where to now?

## 4. Items

- 4.01. About items
- 4.02. Adding a new item
- 4.03. Item categories
- 4.04. Item master lists
- 4.05. Programs
- 4.06. Stock locations and location types
- 4.07. Building (manufacturing) items
- 4.08. Merging two items

- 4.09. Ad hoc items
- 4.10. Non-stock items
- 4.11. Managing drug interaction groups
- 4.12. Managing item access with Departments
- 4.13. Prices in mSupply
- 4.14. Repacking items
- 4.15. Show items with stock
- 4.16. Splitting a stock line
- 4.17. Stocktakes
- 4.18. Phased stocktakes
- 4.19. Inventory adjustments
- 4.20. Units
- 4.21. Forecasting
- 4.22. Pickfaces and Replenishments setup
- 4.23. Pickfaces and Replenishments

## 5. Customers and Suppliers

- 5.01. Names: using, adding and editing
- 5.02. Contacts
- 5.03. Merging two names
- 5.04. Name categories
- 5.05. Name tags
- 5.06. Suppliers: adding and viewing

## 6. Purchasing

- 6.01. Ordering stock from suppliers
- 6.02. Managing purchase orders
- 6.03. Purchase order categories
- 6.04. Ordering from one store to another (internal orders)
- 6.05. Multi-store Purchase Orders

## 7. Receiving Goods

- 7.01. Supplier invoices
- 7.02. Goods receipts
- 7.03. Editing pack sizes
- 7.04. Managing outstanding purchase order lines (pipeline stock)
- 7.05. Custom stock fields
- 7.06. Managing donors

## 8. Issuing Goods

- 8.01. Issuing goods to a customer (customer invoices)
- 8.02. Viewing customer invoices
- 8.03. Backorders

- 8.04. Electronic invoices
- 8.05. Transferring goods to another store
- 8.06. Box management
- 8.07. Stock control methods for your customers (requisitions)
- 8.08. Customer budgets

## **9. Payments and Receipts**

- 11.01. Payments to suppliers
- 11.02. Receiving payment from customers
- 11.03. Prescription payments and credits
- 11.04. Cash register

## **10. Dispensing Goods**

- 10.01. Dispensary mode
- 10.02. Prescription entry
- 10.03. Patients
- 10.04. Patient insurance
- 10.05. Prescribers / Clinicians
- 10.06. Abbreviations for dispensing
- 10.07. Diagnoses
- 10.08. Label printing preferences
- 10.09. Warnings
- 10.10. Patient medication records
- 10.11. Printer setup for Remote Desktop Client
- 10.12. Patient type and Ward setup

## **11. Reports**

- 13.01. Report basics
- 13.02. Stock and items reports
- 13.03. Transaction reports
- 13.04. Purchasing reports
- 13.05. Stocktake reports
- 13.06. Requisition reports
- 13.07. Dispensary/prescription reports
- 13.08. Dashboard
- 13.09. Customer ordered shortfall report
- 13.10. ATC and DDD code based reports
- 13.11. Other reports
- 13.12. Manage reports
- 13.13. Saving report templates
- 13.14. Custom reports
- 13.15. SuperReport editor

## **12. Using Barcode Scanners**

- [15.01. Barcode scanning](#)
- [15.02. Adding barcodes to items](#)
- [15.03. Barcode scanning and receiving goods](#)
- [15.04. Barcode scanning and stocktaking](#)
- [15.05. Barcode scanning and pick list checking](#)
- [15.06. Barcode label printing](#)
- [15.07. Barcode scanning and prescriptions](#)
- [15.08. Barcode scanning with handheld computers \(The Zapp App\)](#)

## **13. Preferences**

- [16.01. General preferences](#)
- [16.02. Purchase order preferences](#)
- [16.03. Invoice preferences](#)
- [16.04. Printing preferences](#)
- [16.05. Mobile Dashboard set up \(before v4.0\)](#)
- [16.06. Entering a new logo](#)
- [16.07. Synchronisation preferences](#)
- [16.08. FrontlineSMS](#)
- [16.09. Barcode scanning preferences](#)
- [16.10. Options \(standard reasons\)](#)
- [16.11. Custom fields](#)

## **14. Data Import and Export**

- [17.01. Importing items](#)
- [17.02. Importing stock](#)
- [17.03. Importing names](#)
- [17.04. Importing prescribers](#)
- [17.05. Importing abbreviations](#)
- [17.06. Importing customer budgets](#)
- [17.07. Importing locations](#)
- [17.08. Importing supplier invoices](#)
- [17.09. Importing assets](#)
- [17.10. Importing regions](#)
- [17.11. Importing requisitions](#)
- [17.12. Importing supplier quotes into Tenders](#)
- [17.13. Importing stores](#)
- [17.14. Importing tenders](#)
- [17.15. Exporting items, exporting items and stock](#)
- [17.16. Exporting locations](#)
- [17.17. Exporting names](#)
- [17.18. Exporting records](#)
- [17.19. Exporting invoices](#)
- [17.20. Exporting invoices to Moneyworks](#)
- [17.21. Exporting to MYOB](#)
- [17.22. Exporting sites](#)
- [17.23. Exporting assets](#)
- [17.24. Exporting to the dashboard](#)

## 15. Tenders

- 18.01. Introduction to tender management
- 18.02. Standard tender conditions
- 18.03. Adding suppliers to a tender and inviting responses
- 18.04. Adding supplier responses to a tender
- 18.05. Tender reference documents
- 18.06. Benchmark prices for tenders
- 18.07. Analysing supplier responses and creating purchase orders
- 18.08. Tender currencies
- 18.09. Supplier instructions for using tender submission web interface
- 18.10. Using web tenders
- 18.11. Supplier instructions for submitting tender responses via Excel

## 16. Remote User Web Interface

- 19.01. Introduction to web interfaces
- 19.02. mSupply web server
- 19.03. mSupply customer web interface
- 19.04. mSupply customer web interface: guide for customers
- 19.05. Web Dashboard
- 19.06. Mobile Dashboard set up (after v4.0)
- 19.07. Online catalogue
- 19.08. Stock web app
- 19.09. mSupply REST API
- 19.10. mSupply legacy REST APIs
- 19.11. mSupply sync API
- 19.12. UNFPA LMA reports app

## 17. mSupply Mobile (Android)

- 22.02. mSupply Mobile technical instructions for setup
- 22.03. mSupply configuration for mobile
- 22.01. mSupply Mobile user guide

## 18. Hospital Info System (HIS) Module

- 20.01. Why a HIS module for mSupply?
- 20.02. Setting up wards and beds
- 20.03. ICD disease codes
- 20.04. Procedures
- 20.05. Patients
- 20.06. Encounters
- 20.07. Other lists
- 20.08. Statistics
- 20.09. HIS preferences

## 19. Intergration of Other Systems with mSupply

- 23.01. DHIS2 integration
- 23.02. DHIS2 LMIS integration
- 23.03. FrontlineSMS integration
- 23.04. mSupply eLMIS interface
- 23.05. Moneyworks integration
- 23.06. MYOB
- 23.07. NHLMIS integration
- 23.08. HL7 and Tamanu/Patis Plus integration
- 23.09. iVEDiX integration
- 23.10. Siglofa integration

## 20. Data Tables and Fields

## 21. Technical Administration

- 25.01. mSupply client / server installation part 1
- 25.02. mSupply client / server installation part 2
- 25.03. mSupply client / server installation part 3
- 25.04. Schedules and periods
- 25.05. Web browser access via TSPlus
- 25.06. Backup
- 25.07. Updating mSupply
- 25.08. Changing users and passwords
- 25.09. Diagnostics
- 25.10. Finalising transactions
- 25.11. Managing data files
- 25.12. mSupply dispensary installation
- 25.13. mSupply server administration
- 25.14. mSupply deployment
- 25.15. Managing users
- 25.16. Show connected users
- 25.17. License management
- 25.18. Label printer hardware setup
- 25.19. The system log
- 25.20. Server troubleshooting
- 25.21. Help menu
- 25.22. Field descriptions

## 22. Other Topics

- 26.01. Miscellaneous topics
- 26.02. Reminders
- 26.03. Transaction Status & Type Codes
- 26.04. Budgets
- 26.05. Edit menu
- 26.06. Transaction categories
- 26.07. Virtual stores

- 26.08. Bulk Store Preferences Editor
- 26.09. Custom data
- 26.10. Currencies
- 26.11. Using foreign currencies in transactions
- 26.12. Product (drug) registration
- 26.13. Using the mSupply remote client
- 26.14. Authorisation
- 26.15. Remote authorisation
- 26.16. Misc labels
- 26.17. Keyboard shortcuts
- 26.18. Troubleshooting
- 26.19. Migrating to Open mSupply
- 26.20. Document registry

## 23. Help

- 27.01. Support and mSupply Up-to-Date program
- 27.02. mSupply Support Web Portal
- 27.03. Help > About mSupply

## 24. Frequently Asked Questions

- 28.01. How to re-set the mSupply client
- 28.02. Remote Support - Installing TeamViewer
- 28.03. Why is my stock balance report showing negative?
- 28.04. How to remove stock lines that have '0' available
- 28.05. What do I need to set up mSupply Mobile?
- 28.06. Why is my stock on hold?
- 28.07. How to correct wrong pack sizes
- 28.08. How to report by invoice category
- 28.09. Imprest work flow
- 28.10. Tips and tricks
- 28.11. Benefits of a multi-store system
- 28.12. How to access Temp folder
- 28.13. Fixing incorrectly received stock
- 28.14. Navigating inactive windows or form
- 28.15. Wastage Prediction due to expiry when ordering
- 28.16. Microsoft Print To PDF Issue

A PDF version of the user guide can also be downloaded from the [mSupply site](#)



From:

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

Permanent link:

<https://docs.msupply.org.nz/misc:contents?rev=1571373880>

Last update: **2019/10/18 04:44**

