5.01. Names: using, adding and editing

About names

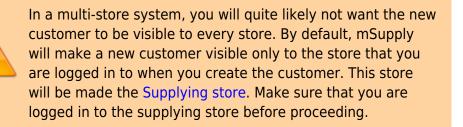
In mSupply a "name" is one of these:

- 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



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).

Name Name Code Charge to Name Type Facility HSH code HSH name	5	Contact email web site Phone Fax Status Hold	Price Category	Store: General Currency USD Currency USD Currency USD Currency USD Printing Print invoices alphabetically
Category Customer Supplier Manufacturer Benchmark Main/Billing Address 1 Address 1 Address 2 Address 3 Address 4 Address 5	Other Category 1 None Category 2 None Category 3 None Category 4 None	Category 5 Category 6 Category 6 State/Region Flag Postal address	None G	Custom 2
Post code Country	s can also be m	Supply stores -	ока м	

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 S		
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:

	Show customers
Normal O	Fuzzy
Name filter	
Name	 contains Contains
and	🗘 District ᅌ is
and	Customer group is Don't Care
Search	
O All na	
💽 Custo	mers 🗸 Exclude patients
Suppl	iers
Exclude hidde	en names
	Complex Find Cancel Find

- 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					
2		[¥		1				21/60
New	Modify	Set flags	Print Find	Order by	Merge	Labels	Report	Custom data	Customise		
Code		Charge to	Name	Addres	ss 1	Address	2	Currency	Category 1	Flags	Custom Data
ALD	1	MCG	Alders Store	12 Excellence	Lane	Russia		USD			
AMN	4	AMN	Amnesty Hospital	100 Christmas	Rd	New Zealand		USD			{"Custom Code":{"data":"ABC"},"Insured":{"data":1}}
Baltimor	1	Baltimor	Baltimor	Cristo Rei		Dili DHS		USD	DILI		
BIK	1	BIK	Bike Hospital	111 Cycle Lan	e	New Zealand		USD			{"Custom Code":{"data":"ABC"},"Insured":{"data":1}}
CAC	(CAC	Cactus Hospital	87 Books Road	ł	Brazil		USD			
camelrefhosp		camelrefhosp	Camelbak Refeospital (Store)	Australia				AUD	Baure)		{"Custom Code":{"data":"ABC"},"Insured":{"data":1}}
DIL-020-N	1	DIL-020-N	National Health Laboratories	East Dili, CRIST	TO REI	DILI		USD	DILI		
Elm	1	Elm	Elm Pharma	897 Diagon Al	ly	Greece		USD			

Buttons in the names list window

New

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

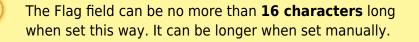
Modify

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.

Merge

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

					Names lis	t				
New	9	dify Set flags	Print		Order by	Merge	Labels	Report	Customise	11/
Code	Charge	Name		Address 1		Address 2	Category 1	Flags	Phone	
	albert	Albert Young memorial h	ospital							
ballh	ballh	Ballance Mem Hosp		Lazimpat	Kathn	nandu			977-1-529933	
claus	claus	Clauss Memorial health c	entre							
duwa	duwa	Duwa regional hospital								
Duwahos	Duwahos	Duwa Public Hospital								
garg	garg	Gargan zonal hospital								
Med	Med 🔴	•			Merg	ge names				
pharam	phai									
pleb	pleb									
royal	roya	O Keep	Merge			_ K.	ep 🖸	Merge		
ventura	vent	Vicep 0	merge				teh 🦉	Merge		
		Code	dui	N3			Code	Duwa		
		Charge to	du				Charge to	Duwa		
		Name		wa regional hospital			Name		Public Hospital	
		Address 1					Address 1			
		Address 2					Address 2			
		no, of trans	2				no, of trans			
		last trans		/10/2006			last trans			
								Cr	ancel	ж
								0		
	-		-		_			_		-

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:

		Up	odate	Apply to
Custom Code	ABC			Selected items
Quantity		2		 All items in list
Insured				
Date established	4/04/20			
Programme	P1	\$		
	nged) values will be updated	0	Can	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):

ategory 2 ategory 3 omment ountry ustom 1 ustom 2	Code Charge to Name Address 1 Address 2
omment ountry ustom 1	Name Address 1
ountry ustom 1	Address 1
ustom 1	
	Address 2
ustom 2	Address 2
	Currency
ustom 3	Category 1
ustomer	Flags
ustomer group	>> Custom Data
ate of birth	<<
mail	
ах	
emale	
reight	
old	
lanufacturer	
largin	
laster ID	
aster name	
hone	
ostal address 1	
ostal address 2	
rice 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

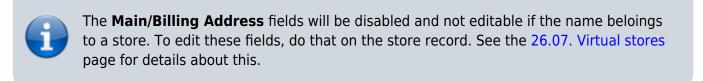
To edit/view a particular name, if you are looking at a list of names double-click the name you want to edit on the list (no need to do this if you are already looking at the name's details page because only 1 name was returned from your search).

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:

• • •	E	dit customer/supplier	
Coneral Invoices Backorders Quotes Notes Contacts Group Purchase orders	New customer1 Name Code new1 Charge to new1 Name New customer1	Contact email web site Phone Fax	Store: General O
Item lists Requisitions Store Photo	Master ID 0 😘 Master name	Status Price Category Hold A	Customer details Supplying store General O Printing Print invoices alphabetically
	Category Other Customer ✓ Supplier Category 1 none Manufacturer Category 3 none Benchmark ✓	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		OK & N	ext Cancel OK

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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

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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.

General	AUTON	NRO I	CIR-D PUBLIC							. China ta Anna	
Invoices									Stor	e: District Sanita	ire 0
Backorders	1										
Quotes	4	F .			Filter	All	0		Ov	erpayments	0.00
Notes	-	eing							Total o	outstanding	848.324.60
Contacts	~9	enig									
Group	Ty	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.

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2 . (usto	mer invoice	:							×
Th	Nam eir r nmen E	e 102824 ef 102824 nt tuesday o line Del	CS04	nfirm date Period Category Backo	01/01/08 - None	31/12/08	•	Goods re	Colour : Invoice : 3,040 try date : 16/12/00 ceive ID : 0 Status : cn tered by : Pharman Store : General	Black 8 cy assistant
	L.,	Location	Item Name	Quan	Pack Size	Batch		Sell Price	Price exten	*
	1	TAB	Condom male unit	5	144	6J107	30/09/11	0.00		0.00
1		NON	Gauze swab 8ply 10cmx10cm	3	1			4.58		13.76
	-		Gauze swab 8ply 5cmx5cm	5	1			1.72		8.60
	4	NON	Examination Gloves large	-	100			0.00		0.00
	5	AAA	Amoxycillin 500mg cap	1000	1			0.00		0.00
	6	VAC	Hep B 10 dose vial	20		WVA06026		0.00		0.00
ŀ	7	LTE	Chlorhexidine 1% solution (mL)	1	5000	80356	30/03/12	0.00		0.00
ŀ										
										Ť
16	1 6) 💌 🗷	Other charges Item:						Amount:	0.00
19			1					S	ubtotal:	22.36
									0 % tax:	0.00
									Total:	22.36
1 m	lold inali	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 summa	ary – 🗆 🗙
Cut off days	Outstanding totals
less than 30 days	0 ^ 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
	, v
<	2
	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 Quotes lotes	New backo	rder Delete backorder Copy	S Print			Store: General *	î
ontacts					223		
roup	Code	Item	Order date		Stock	Comment	-
urchase orders	Lig11	Lignocaine 1% 20ml/50ml vial	22/02/11	5	10		
Veb log-in	Cotsyr	Cotrimoxazole 240mg/5ml susp (100mL)	22/02/11	110	13816		
avourites	Erysyr	Erythromycin 125mg/5ml susp (100mL)	22/02/11	8	3729		1.1
tock history	Flusyr	Flucloxacillin/Cloxacillin 125mg/5ml susp (1		10	11900		
store	Mebsyr	Mebendazole 100mg/Smls syrup (30mL)	22/02/11	10	0		=
	Parsyr	Paracetamol 120mg/5mls syrup (mL)	22/02/11	20000	578050		
	Sal4	Salbutamol 4mg tab	22/02/11	400	50400		1.1.1
	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		-
	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		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
ltem Order date Quantity	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.

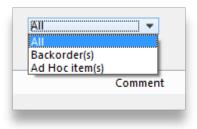
Viewing backorders

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

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	CONTRACTOR CONTRACTOR CONTRACTOR									Stor	e: 🔇	General		
nvoices											_			
Backorders														
Quotes	🚖 🐹			_				_						
Notes Contacts	New Quote Delete Qu	uote	Sh	ow: All	_	_		•						
Emails	Item	Date	Cur	Rate	Price	Pac	Freight	S	Cost	Adj Cost	Pr	Valid Until	Comment	
roup	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	Banitidine 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	Ξ	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	2	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	1	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	2	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 (PenV) 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	NZD	0.7485	25.65		1.00		19.22	0.0384			AF Fiji (Apotex)	
	Mataalana serida 10eaa tah	21 102 100	M7D	0.7406	7 90	100	1.00		E 07	0.0597		2010/10/00	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:

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.

• The date on which you are entering a new note is already completed, and in the main panel you

displaying of the note on screen; it may appear as an alert when a Supplier invoice is created,

• In the lower left of the window is a drop-down list offering various choices concerning the

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should type in the wording of the note itself.

when a Purchase Order is created, etc..

ieneral woices ackorders	Multichem Exports	Ltd		Store: General	•	i	
uotes	_	Delete Note					
otes ontacts mails	Date 03/06/11	Open day - 1 July 2011, 10:00-20:00	Note				^
roup urchase orders							
eb log-in wourites ock history							
ore							
				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	<u> </u>
	Entered by: Sussol 01/12/11 Modfied by:	
Note	Closed for stocktaking - 30/31 December	
	Ÿ	
Display	never	
	all Cancel OK Supplier Invoice is created Purchase Order is created	
-	Goods Receipt is created Customer Invoice is created	

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

Seneral nvoices Jackorders Duotes lotes		Contact			Store: Bada	ams
ontacts iroup urchase orders em lists lequisitions bore hoto	First	Lest	Position	Email	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:

• • •	Add a contact
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 supplier	
Name USAID	
	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

ieneral nvoices	London Dispensary	Store: General 💌 👔
ackorders		
uotes	Customer group none 💌	
otes		
ontacts	Item departments which can be supplied to this group.	
mails	Item departments	
roup		
urchase orders	A CARLES AND A C	
/eb log-in		
avourites		
ock history		
tore		
	· · · · · · · · · · · · · · · · · · ·	
	Warning: setting a customer group can affect which items can be supplied	to them
	이야지 말했다. 그는 것은 것은 것은 것을 많이 많이 많이 없는 것을 많이 없다. 것을 많이 많이 많이 없다. 것을 많이 많이 없다. 것을 않이 없다. 것을 많이 않다. 것을 않아. 것을 많이 없다. 것을 많이 없다. 것을 많이 없다. 것을 않아.	
	이 물건가 많은 것 같아요. 물건을 만들고 있는 것을 가지 않는 것을 했다.	



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...

Customer Item dep	group none bartmen hospital > 50 bec hospital < 50 bec Urban clinic Rural clinic MCH clinic Island health po	ds

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

neral	Internat	iona	l Dispens	ary As	ociati	0			S	tore: General	- G	
oices												
tkorders												
otes	Ord	no	Status	Da	te	Lock	Target days	Lines	Col	mment	*	
tes		100	sa	17	12/08		0		NON-DRUGS IDA ORDER 1			
ntacts		123	-		01/09		0	-	KIRDRUGTENDER 1			
ails		193			06/09		0					
ир		325			03/10		0		Controlled Drugs Order AF			
chase orders		291	cn	05	01/10	171	21		-			
b log-in ourites		358			07/10		0		Drug Order July 2010 AF			
ountes ck history		404	cn	15	12/10		0	23	IDA Tender Order Air freight			
ck history re		410	cn	15	12/10		0	101	IDA Tender Order Sea Freight			
re		424	sg	22	03/11		0		-	No of PO Lines 1		
		432	cn	30	06/11		0	2				
											-	
									m		•	
	-											

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

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Web log-in tab

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

• • •				Edi	t custo	omer/s	upplier		
General Invoices	Norvic Department								Store: (HQ Store C)
Backorders									Default Order Days 0
Quotes Notes	Item lists attached to	o this nam	e					Items	
Contacts	•	-						ltem code	Item name
Group		ete list							Abacavir 120 + Lamivudine (3TC) 60 mg Tablet
Purchase Orders	list								Abacavir 600 + Lamivudine (3TC) 300mg Tablet
Item List Requisitions	List	Master	Imprest	Requisiti	Web	Price		03_0050	Acetazolamide 250mg tab
Requisitions Store Visibility	name	list	_		neo	Thee		04_0720	Acetylcysteine Injection 200mg/ml
Photo	2025 Hospital EML Hot Climate list					_		03-0066	Acetylsalicylic acid 100mg tablet
Custom data	Hot Climate list	1			0			03_0072	Aciclovir (Acyclovir) 250mg vial
Log								03_0073	Aciclovir (Acyclovir) 400mg tablet
mSupply Link								06_0080	Aciclovir (Acyclovir) 800 mg tablet
Tags									Acriflavine 0.2% solution
								06_0078	Acyclovir 3% Tube (5g)
									Acyclovir 5 % cream
								12 5846	Adaparina Injection Rmg/mL visi
	Style Sort by Group	8	Output to Prin Exce	ter	Genera	ate	_ Imp	g method prest cktakes	
						C	OK & Pre	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.

000				Edi	t custo	omer/su	upplier	
General Invoices Backorders Quotes	Norvic Department							Store: HQ Store C
Notes Contacts Group		o this nam ete list	e				Items code	Item name
Purchase Orders	list						01_1001	2 Abacavir 120 + Lamivudine (3TC) 60 mg Tablet 1 Abacavir 600 + Lamivudine (3TC) 300mg Tablet
Requisitions Store Visibility	List name 2025 Hospital EML	Master list	Imprest	Requisiti	Web	Price	04_0720	0 Acetazolamide 250mg tab 0 Acetylcysteine Injection 200mg/ml
Photo Custom data	Hot Climate list	×	Ō	Ŏ			03_0072	6 Acetylsalicylic acid 100mg tablet 2 Aciclovir (Acyclovir) 250mg vial 3 Aciclovir (Acyclovir) 400mg tablet
Log mSupply Link Tags		•	Edit	master lis	st		0600	0 Aciclovir (Acyclovir) 800 mg tablet Acriflavine 0.2% solution
	Imp		2025 Hosp	🗸 Red	quisition ce list	s	06_0079	8 Acyclovir 3% Tube (5g) 9 Acyclovir 5 % cream 5 Adenocine Injection 3mg/ml vial
	Style Sort by	rening insen		Cancel		OK	method	
		-) Exc	el	Gener	ate	Stocktakes	
							DK & 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

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eneral	Health Centre				Store:	General	-	i
woices								
ackorders								
uotes	Id	Entered date	Stock take date		Status		Туре	*
otes	753	11/09/09	11/09/09	cn		im		
ontacts	1650	22/02/10	22/02/10	cn		im		
nails	2106	19/05/10		sg		im		
roup	2479	08/08/10	08/08/10			im		
urchase orders	3008	25/11/10	25/11/10	cn		im		
eb log-in								
vourites								
ock history								
ore								
								-
					OK & Ne		Cancel	OK

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

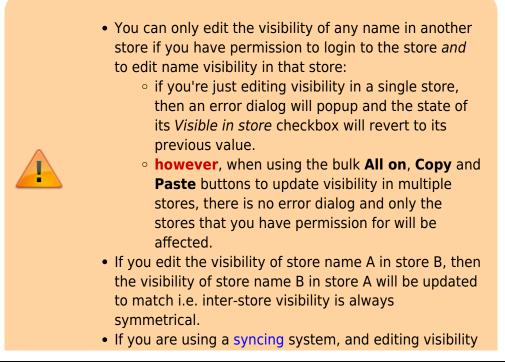
Updated version 4.12

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		
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 Copy	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

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

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

 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/supp	lier				
General Invoices Backorders	Test customer 01					Store:	Central Contrac	eptiv o	i
Quotes Notes Contacts Group Purchase Orders Item List Requisitions Store Visibility Photo Custom data Log mSupply Link Tags	Add photo	Delete Photo		0 KI	h Map coordinates La Long	t		0	
					OK & I	lext	Cancel		ОК

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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

2025/08/10 23:30

- 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

• • •	Edit customer/supplier	
General Invoices	Test customer 01	Store: General 0
Backorders Quotes	New field 1	
Notes Contacts	New field 2 0	
Group Purchase Orders	New field 3	
Item List Requisitions Store Visibility	New field 5	
Photo Custom data		
Log Supplier Hub		
Tags		
		OK & Next Cancel 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

• • •				Edit customer/su	pplier				
General Invoices	Test customer 0	1				Store:	General	•	
Backorders Quotes	Date	Time	User	Event type		Event			
Notes	04/05/202	1 15:44:08 susse	ol	Create name	Name created				
Contacts									
Group									
Purchase Orders									
Item List									
Requisitions									
Store Visibility									
Photo									
Custom data									
Log									
Supplier Hub								_	
Tags									
								_	
						OK & Next	Cancel	OK	

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

• • •		Edit customer/supplier	
General Invoices Backorders	Test customer 01 Hub Registration		Store: Ceneral 0
Quotes Notes Contacts Group Purchase Orders Item List Requisitions	Site 1	lame	
Store Visibility Photo Custom data Log Supplier Hub Tags			Register
			OK & Next Cancel OK

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 6
Backorders Quotes Notes Contacts Group Purchase Orders Item List Requisitions Store Visibility Photo Custom data Log mSupply Link Tags	T tag1 tag2	ags	Use	

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

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