5.01. Names: using, adding and editing

About names

In mSupply a "name" can be any combination of a:

- 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

Adding a customer, supplier, manufacturer, donor or benchmark

Adding a new customer

- To add a new customer, choose *Customer > new customer* from the menu.
- The form shown below will come up.
- The customer checkbox will be checked and disabled (from editing).

Name Code Charge to Mame Type Facility Math HSH code HSH name	S	Contact email web site Phone Fax Status Hold	Price Category	Store: General Currency USD Currency USD Currency USD Printing Print invoices alphabetically
Category O Customer Supplier Manufacturer Benchmark	ther Category 1 None Category 2 None Category 3 None Category 4 None	Category State/Regi	y 5 None C y 6 None C ion None C	Custom 2
Main/Billing Address Address 1 Address 2 Address 3 Address 4 Address 5 Post code Country		Postal address		Shipping address

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.

Items 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.

<HTML>

</HTML>

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

<HTML>

</HTML>

- 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)

Master ID & Master name: These are used when using the remote tender module to link suppliers with their master ID on the remote tender server and maintained by Sustainable Solutions.

To link a supplier to the remote tender server, login to the tender server using the login details sent to you by Sustainable Solutions, and find the supplier and find its ID. When you have that, copy it down (or copy it to the clipboard) then click on the padlock to make the **Master ID** field enterable in mSupply. Now enter the ID (or paste it in) and click on the **synchronise** button next to the **Master ID** field. mSupply will then contact the tender server and search for a supplier with the ID you have entered. If the search is successful, the name the supplier has on the server will be put in the **Master name** field and you're finished. It it's unsuccessful, you'll be given an appropriate message.

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 can not be used for receiving or issuing goods.

Donor checkbox: (Applicable to suppliers only) There are two 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: 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).

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.

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.

Hiding names on a per-store basis

If you check the **Hide in this store** checkbox, the customer/supplier you are currently viewing will no longer be shown in the store your are now logged in to.

- This allows you to have customers that are specific to each store.
- To find a name that is hidden, you can use the **Complex find** button in the window that is shown when you choose **Names > Show customers** or **Names > Show suppliers**

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 going to **Special > Show** stores > [choose your store and double-click] > Preferences tab and checking 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
lormal O	Fuzzy
Name filter	
Name	contains ᅌ
and ᅌ	District 🔉 is
and	Customer group is Don't Care
Search	
All names	Manufacturers
Selection	Donors
Customer	rs 🗸 Exclude patients
Suppliers	
Z Exclude hidden n	ames
	Complex Find Cancel Find
	Complex rind Garlder 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	5				
2		[¥		1				21/60
New	Modify	Set flags	Print	Find	Order by	Merge	Labels	Report	Custom data	Customise		
Code		Charge to	Na	me	Addre	ss 1	Addres	s 2	Currency	Category 1	Flags	Custom Data
ALD		MCG	Alders Store		12 Excellence	Lane	Russia		USD			
AMN		AMN	Amnesty Hospit	al	100 Christma	s 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 Lar	ne	New Zealand		USD			{"Custom Code":{"data":"ABC"},"Insured":{"data":1}}
CAC		CAC	Cactus Hospital		87 Books Roa	d	Brazil		USD			
camelrefhosp		camelrefhosp	Camelbak Refe.	.ospital (Store)	Australia				AUD	Baure)		{"Custom Code":{"data":"ABC"},"Insured":{"data":1}}
DIL-020-N		DIL-020-N	National Health	Laboratories	East Dili, CRIS	TO REI	DILI		USD	DILI		
Elm		Elm	Elm Pharma		897 Diagon A	lly	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:

				<u>ج</u>	.	X			<u> </u>	
New	Mo	dify Set flags	Print	Find	Order by	Merge	Labels	Report	Customise	
	Charge			Address 1		Address 2	Category 1	Flags	Phone	
	albert	Albert Young memorial ho	ospital							
	ballh	Ballance Mem Hosp		azimpat	Kathn	nandu			977-1-529933	
claus	claus	Clauss Memorial health ce	entre							
duwa	duwa	Duwa regional hospital								
Duwahos	Duwahos	Duwa Public Hospital								
	garg	Gargan zonal hospital								
	Med 😑	•			Merg	ge names				
pharam	phai									
pleb	pleb									
	pleb roya	C Keep	Merge			⊂ Ke	ep 👩	Merge		
royal		💽 Кеер 🗌	Merge			⊖ Ke	ер	Merge		
royal	roya	• Keep	Merge duw			⊖ Ke	cep Code	Merge Duwa	hos	
royal	roya					⊖ Ke				
royal	roya	Code	duwa duwa			⊖ Ke	Code	Duwa Duwa		
royal	roya	Code Charge to	duwa duwa	1		⊖ Ke	Code Charge to	Duwa Duwa	hos	
royal	roya	Code Charge to Name	duwa duwa	1		⊖ Ke	Code Charge to Name	Duwa Duwa	hos	
royal	roya	Code Charge to Name Address 1	duwa duwa	1		_ Ке	Code Charge to Name Address 1	Duwa Duwa	hos	
royal	roya	Code Charge to Name Address 1 Address 2	duwa duwa Duwa 2	1		∩ Ke	Code Charge to Name Address 1 Address 2	Duwa Duwa Duwa	hos Public Hospital	
royal	roya	Code Charge to Name Address 1 Address 2 no. of trans	duwa duwa Duwa 2	a a regional hospital		∩ Ke	Code Charge to Name Address 1 Address 2 no. of trans	Duwa Duwa Duwa	hos Public Hospital	
royal	roya	Code Charge to Name Address 1 Address 2 no. of trans	duwa duwa Duwa 2	a a regional hospital		∩ Ke	Code Charge to Name Address 1 Address 2 no. of trans	Duwa Duwa Duwa	hos Public Hospital	
royal	roya	Code Charge to Name Address 1 Address 2 no. of trans	duwa duwa Duwa 2	a a regional hospital		∩ Ke	Code Charge to Name Address 1 Address 2 no. of trans	Duwa Duwa Duwa	hos Public Hospital	
royal	roya	Code Charge to Name Address 1 Address 2 no. of trans	duwa duwa Duwa 2	a a regional hospital		∩ Ke	Code Charge to Name Address 1 Address 2 no. of trans	Duwa Duwa Duwa	hos Public Hospital	

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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:

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	Bulk Edit Name Custom Data									
		Update	Apply to							
Custom Code	ABC		Selected items							
Quantity		2	 All items in list 							
Insured										
Date established	4/04/20									
Programme	P1	ی 🖸								
Fields with default (unchan	ged) values will be updated	≎ Can	cel Save Changes							

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

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

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

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

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

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

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

OK Button: Closes the window

Editing or viewing a name

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

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

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

Invoices tab

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

0 0						Edit cust	omer/supplier				
Contract											
General Invoices	AUP533	DEMO:	CSR-0 PUBLIC	,					Stor	e: District Sanitai	ire 0
Backorders											_
Quotes	6	F .,			Filter	All	0		Ov	erpayments	0.00
Notes	-	_							Total	outstanding	848.324.60
Contacts	Ag	peing							TOLET	outstanding	040,324.00
Group	Tv	. St	Entry dt	Confirm dt	inv num	Their ref	Comment	Total	Currency	Total (local c	Outstanding
Purchase Orders	ci	sg	18/03/2020	commut	7	menner	Web order:	0.00		0	0.0
tem List	ci	fn	06/06/2019	06/06/2019	20		Facture ddu client	0.00		176725	0.0
Requisitions	ci	fn	06/06/2019		23		Facture ddu client	0.00		0	0.0
Store	ci	fn	06/06/2019		24		Facture ddu client	0.00		0	0.0
Photo	ci	fn		17/06/2019	125		Facture ddu client	0.00		0	0.0
Custom data	ci	fn	26/06/2019		175		Facture ddu client	0.00		0	0.0
og	ci	fn		12/07/2019	239		Facture ddu client	0.00	XOF	0	0.0
Supplier Hub	ci	fn	12/07/2019		240		Facture ddu client	0.00		134680	0.0
	ci	fn		15/07/2019	244		ALLOCAEMENT)	167,180.00	XOF	167180	167,180.0
	ci	fn	15/07/2019	15/07/2019	245		PNSME	6,625.00	XOF	6625	6,625.0
	ci	fn	15/07/2019	15/07/2019	246		PNSME (K+ ZINC)	0.00	XOF	0	0.0
	ci	fn	15/07/2019	15/07/2019	247		PNLS_TRC	0.00	XOF	0	0.0
	ci	fn	22/07/2019	22/07/2019	304		GTC	30,000.00	XOF	30000	30,000.0
	ci	fn	24/07/2019	24/07/2019	344		MEDICAINTRANTS	0.00	XOF	0	0.0
	ci	fn	13/08/2019	13/08/2019	431		GTC	53,400.00	XOF	53400	53,400.0
	ci	fn	16/08/2019	16/08/2019	462		GTC	0.00	XOF	90510	0.0
	ci	fn	16/08/2019	16/08/2019	465		DOTATION ARV	0.00	XOF	0	0.0
	ci	fn	19/08/2019	19/08/2019	469		COMPLETION ARV	0.00	XOF	0	0.0
	ci	fn	19/08/2019	20/08/2019	468			0.00	XOF	0	0.0
	ci	fn	26/08/2019	26/08/2019	509		MEDICANTS PNLP	0.00	XOF	0	0.0
	ci	fn	10/09/2019	10/09/2019	550		MEDICANTS_PNLP	0.00	XOF	0	0.0
	ci	fn	10/09/2019	10/09/2019	551		MEDICATS_PNSME	0.00	XOF	0	0.0
	ci	fn	09/09/2019	11/09/2019	542		MEDICAINTRANTS	296.199.60	XOF	296199.6	296.199.6
								OK	& Next	Cancel	ОК

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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names:adding_and_editing https://docs.msupply.org.nz/names:adding_and_editing?rev=1606194178

2 • C	usto	mer invoice	:							×
1	Nam	e Hanna T		Confirm date	17/12/08				Colour :	Black
Th	eir r	ef 102824	C504	Period	01/01/08 -	31/12/08	•		Invoice : 3,040	
			order 👢	Category	None		•	Fr	try date : 16/12/0	8
Con	nmer	nt tuesday (order	category	line					,
								Goods re	ceive ID: 0	
	æ.		61.	R	1	R			Status : cn	
1	lew		ete line(s)	Backo		History		En	tered by : Pharma	cy assistant
									Store : General	
Ge	neral	Summary	by Item Summary by Batch Transpo	rt 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
1	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	WVA06026	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 It	em:					Amount:	0.00
	-) 🛃 🛃		em					subtotal:	22.36
									0 % tax:	0.00
									Total:	22.36
									19101.	22.30
L	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 sumr 	mary – 🗆 🗙
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
<	, ×
	7
	OK

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

Backorders tab

	Store: General										eneral woices ackorders
	All 🔻				1	1		*			uotes
					Pri	Сору	f	e backorder	rder Dele	New backs	otes ontacts
	Comment	ck	ity :	e Q	Or			Item		Code	mails
1		10	5	1	1 2	al	nl via	6 20ml/50m	Lignocaine 1	Lig11	roup
		816	10	1	1	usp (100mL)	ml su	e 240mg/5n	Cotrimoxazo	Cotsyr	urchase orders
0.110		729	8	1	1	sp (100mL)	l sus	125mg/5ml	Erythromycin	Erysyr	/eb log-in
		900	10	1	(1 2	img/Sml susp (125	Cloxacillin	Flucloxacillin	Flusyr	wourites
=		0	10	1	1	yrup (30mL)	nis s	100mg/5m	Mebendazol	Mebsyr	ock history
		050	00 !	1	1	rup (mL)	s syr	20mg/5mls	Paracetamol	Parsyr	tore
		400	00	1	2			mg tab	Salbutamol	Sal4	
		000	00 7	1	2			00mg cap	Amoxycillin 5	Amo500	
A		700	00	1	2	mg cap	500	Cloxacillin	Flucloxacillin	Flu500	
U		700	00 !	1	2			tab	Aspirin 300m	Asp3	
		648	00	1	2			g tab	Atenolol 50n	Ate5	
		0	00	1	1	nuf) mL	(mai	6 Solution	Acriflavin 0.1	acrsol	
		072	00 (1	.5 2	avion) 15%+1.	ie (Sa	lorhexidin	Cetrimide+C	Savi	
		220	1	1	m 2	on 1% (gm or i	lotic	e obstetric l	Chlorhexidin	Chexobs	
		750	10	1	1		g)	lly (KY) (82g	Lubricating j	Lubjel	
-		250	5 4	1	1	e/tube)	ottle	6 Lotion (b	Permethrin 5	PermSlot	
	OK & Next Cancel	072 220 750	00 (1 10	1 1 1	.5 2 m 2	avion) 15%+1. on 1% (gm or i	lotio g)	lorhexidin e obstetric l Ily (KY) (82g	Cetrimide + C Chlorhexidir Lubricating j	Savl Chexobs Lubjel	

• 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.

\$	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.

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.

All	
Backorder(s)	
Ad Hoc item(s)	
	Comment

- 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

Invoices										Stor	e: [General	- · ·	
Backorders														
Quotes	÷ 🕺							_						
lotes	New Quote Delete Q	uote	She	ow: All										
ontacts	li	0.1	~		0.1	0	F . 1 . 1 .		6	110.1	0	0.000	C	
mails	Item	Date		Rate		Pac	Freight	5	Cost		Pr	Valid Until	Comment	-
Froup	Chloramphenicol 5% ear drops	25/02/09		0.7485			1.00	-	2.65	2.6571		20/03/09	NZ. Air freight	_
Purchase orders	Phenytoin 50mg/ml amp	25/02/09		0.7485		-	1.00	-	86.12	17.2259		20/03/09	250mg/5ml. NZ. Air freigh	
Veb log-in	Ranitidine 25mg/mL amp	25/02/09		0.7485		-	1.00	-	10.21	2.0434		20/03/09	NZ. Air freight	
Favourites	Suxamethonium 100mg/2ml amp	25/02/09		0.7485			1.00	_	172.38	3.4477		20/03/09	NZ. Air freight	
Stock history	Amoxycilin+Clavulanate 500mg+1	25/02/09		0.7485		100	1.00	-	49.40	0.4940		20/03/09	unk brand, india. Air	
Store	Enalapril 5mg tab	25/02/09		0.7485		100	1.00	4	2.32	0.0232		20/03/09	unk brand, india. air	
	Griseofulvin 500mg tab	25/02/09		0.7485		500	1.00	V	72.60	0.1452		20/03/09	unk brand, india. air	
	Salbutamol 4mg tab	25/02/09		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	1	22.64	22.6421		09/04/09 Ro	CIF price - air freight	
	Naloxone 400mcg/ml amp	31/03/09	NZD	0.7485	49.68	5	1.00		37.18	7.4370		30/04/09	AF,	
	Phenoxymethylpenicillin (PerV) 12	31/03/09	NZD	0.7485	3.95	1	1.00	1	2.95	2.9565		30/04/09	AF	
	Captopril 25mg tab	31/03/09	NZD	0.7485	25.65	500	1.00		19.22	0.0384		30/04/09	AF Fiji (Apotex)	
	Mataalancamida 10ma tah	21,102,000	M7D	0.7406	7 90	100	1.00	-	E 07	0.0597		2011/04/100	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:

neral voices ckorders uotes	Multichem Exports	s Ltd		Store: General 👻	
tes	Date		Note		
ntacts ails	03/06/1	Open day - 1 July 2011, 10:00-20:00			
up					
hase orders					
log-in					
k history					
e		2			
	13				-
				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.

	ustomer/Supplier notes 01/12/11	Entered by : Sussol Modfied by:	
	Closed for stocktaking - 30/31		
			÷
Display	when Purchase Order is creat never all Supplier Invoice is creat Furchare Order is creat Goods Receipt is creat	ed Cancel OK	ies

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

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

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

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

Click **OK** when you are finished.

Contacts tab

Edit customer/su General Invoices Backorders Quotes Notes	•	Contact			Store: Bac	iii AMS 🗸	
Contacts Group Purchase orders Item lists Requisitions Store Photo	First	Last	Position	Email	Phone	Category	
					OK & Next	Cancel 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 Password
Phone	
Email	Groups
Address 1	This contact belongs to the following groups:
Address 2	
Country	Add Group Remove Group
Comment	
Category	
Category 2	
Category 3	
nfo if related to a customer or supplier	
Name Name	
	Cancel OK

Deleting a contact

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

Group tab

General Invoices	London Dispensary	Store: General 💌 👔
Backorders Quotes Notes	Customer group none	
Contacts		
Emails Group	Item departments	
Purchase orders Web log-in Favourites Stock history Store	Warning: setting a customer group can affect which items can be supplie	ed to them
		OK & Next Cancel OK
Grou	ips are only relevant to customers, not sup	nliers

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 will be found here: Show groups...

Customer group Item departmen	none hospital > 50 beds hospital < 50 beds Urban clinic Rural clinic MCH clinic Island health post		group.
----------------------------------	--	--	--------

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

Purchase orders tab

neral oices skorders	Internation	al Dispens	ary Associatio)			Store: General 👻	i
otes tes ntacts ails sup chase orders b log-in rourites cck history re	100 123 193 325	cn fn cn cn cn cn cn cn sg	Date 17/12/08 28/01/09 25/03/10 05/01/10 20/07/10 15/12/10 22/03/11 30/06/11		Target days 0 0 0 21 0 0 0 0 0	2 192 110 3 50 4 23 101		A
							TT OK & Next Cancel	

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

Web log-in tab

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

5 01	Names:	usina	adding	and	editina
J.01.	Numes.	using,	auuniy	anu	eulung

Item lists tab

• • •				Ec	lit custo	omer/sı	pplier						
General Invoices Backorders Quotes Notes Contacts	Seloi Kraik Item lists attached to this name							Store: Ceneral (SAMES) O Default Order Days					
Group Purchase orders	Add master Add loca	_	from D	elete list				Add item		Save Sort order			
Requisitions Store Photo	List name CHC District	Master list	Imprest	Stock Takes	Web	Price	Item code			Item name			
	Style Sort by Group 0		Printer Excel		Gener	·		g method prest ocktakes	OK & Next	Cancel	ОК		

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

Stock history tab

eneral voices ackorders	Health Centre				Store: Gene	ral 💌	i
uotes	Id	Entered date	Stock take date	Stat	us	Type	*
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	cn	im		
irchase orders	3008	25/11/10	25/11/10	cn	im		
eb log-in							
vourites							
ock history							
ore							
							-

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

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.

00		Edit customer/supplier	
General nvoices lackorders	Test customer Search stores		Store: General 0
Quotes		Stores	Visible in store
iotes	General		
ontacts	Registration		
oup	Test dispensary		i i i
rchase Orders	rest disperioury		
em List			
quisitions			
ore Visibility			
oto			
stom data			
9			
pplier Hub			
igs			
	All on Copy	Paste	OK & Next Cancel OK
	Copy	, uno	

Visibility for names created on a synced system

Remember that in a synced system, Names (Customers, Suppliers, etc.) can only be created on the Primary server. The exception is patients that can be created in any dispensary on any sync site.

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

- It's home store (the store that you are logged in to when the name is created), and
- Other stores that have sync type **Active** or **Collector** on the same sync site of the home store *if* their store preference **Names created in other stores not visible in this store** is switched OFF.

Click to view more about Store preferences.

Once a name has been created in a dispensary, it's store visibility can then be amended in this tab.

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.

• • •			Ed	it customer/su	pplier	r				
General Invoices Backorders	Test customer 01						Store:	Central Contract	eptiv ¢	•
Quotes Notes	Add photo	Delete Photo			0 КЬ		Map coordin	ates		
Contacts						Map coordinates:				
Group						Lat			0	
Purchase Orders Item List						Long			0	
Requisitions							View on	Мар		
Store Visibility										
Photo										
Custom data										
Log mSupply Link										
Tags										
	L									
						OK & N	lext	Cancel		ОК

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.

Mapping a customer's location

- You can use Google Maps to find latitude and longitude of a customer.
- The first number is the longitude, and the second number is the latitude.
- Enter these numbers into the provided fields in mSupply
- You can then view the customers location by clicking the **View on Map** button.

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

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