## 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, 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 Type Facility	5	Contact email web site Phone Fax Status	Price Category	Store: General Currency USD Customer details Supplying store General C
HSH name	6	Hold	A O	Printing Print invoices alphabetically
Category Customer Supplier Manufacturer Benchmark	Other Category 1 None Category 2 None Category 3 None Category 4 None	Cat	egory 5 None egory 6 None Region 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 addre		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.

#### 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.

<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)

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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 (\_).

#### 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. If your system does not use the Remote tender module, then you can safely leave this blank.

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.

#### 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 can not be used for receiving or issuing goods.

#### **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).

#### User fields

#### 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.

## 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
Normal O	Fuzzy
Name filter	
Name	ᅌ contains ᅌ
and	District 🔉 is
and	Customer group is Don't Care
Search	
All nar	nes 🔿 Manufacturers
🔵 Selecti	on ODDonors
O Custor	ners 🗸 Exclude patients
🔵 Suppli	ers
Exclude hidde	n 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	6				
2		<b>=</b> <		¥		1				21/6
New	Modify Set flag	s Print Find	Order by	Merge	Labels	Report	Custom data	Customise		
Code	Charge to	Name	Addres	is 1	Addres	s 2	Currency	Category 1	Flags	Custom Data
ALD	MCG	Alders Store	12 Excellence	Lane	Russia		USD			
AMN	AMN	Amnesty Hospital	100 Christmas	Rd	New Zealand		USD			{"Custom Code":{"data":"ABC"},"Insured":{"data":1}}
Baltimor	Baltimor	Baltimor	Cristo Rei		Dili DHS		USD	DILI		
BIK	BIK	Bike Hospital	111 Cycle Lane	e	New Zealand		USD			{"Custom Code":{"data":"ABC"},"Insured":{"data":1}}
CAC	CAC	Cactus Hospital	87 Books Road	1	Brazil		USD			
camelrefhosp	camelrefhosp	Camelbak Refeospital (Store)	Australia				AUD	Baure)		{"Custom Code":{"data":"ABC"},"Insured":{"data":1}}
DIL-020-N	DIL-020-N	National Health Laboratories	East Dili, CRIST	TO REI	DILI		USD	DILI		
Elm	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:

New	6	dify Set flags	Print		Names list	Merge	Labels	Report	Customise	11/2
			Print		Order by	-				_
Code albert	Charge albert	Name Albert Young memorial h	a sector l	Address 1		Address 2	Category 1	Flags	Phone	
ballh	ballh	Ballance Mem Hosp	ospital	Lazimpat	Kathm	andu			977-1-529933	
claus	claus	Clauss Memorial health co	antra	Cazimpas	Kasnin	anou			317-1-369933	
duwa	duwa	Duwa regional hospital	entre							
	Duwahos									
garg	garg	Gargan zonal hospital								
Med	Med O	Ourgan zenar nospital			Mero	e names				
pharam	phai	•••			merg					
leb	pleb									
oyal	roya	_								
		💽 Кеер 🗌	Merge			🔵 Ke	ер 🖸	Merge		
	vent					СКе				
		Code	du	wa		⊖ Ke	Code	Duwa		
		Code Charge to	du	W2		_ Ke	Code Charge to	Duwa Duwa	ihos	
		Code Charge to Name	du	wa		⊖ Ke	Code Charge to Name	Duwa Duwa		
		Code Charge to Name Address 1	du	W2		_ Ke	Code Charge to Name Address 1	Duwa Duwa	ihos	
		Code Charge to Name Address 1 Address 2	du du Du	W2		_ Ke	Code Charge to Name Address 1 Address 2	Duwa Duwa Duwa	ihos	
		Code Charge to Name Address 1 Address 2 no, of trans	du du Du 2	wa wa wa regional hospital		_ Ke	Code Charge to Name Address 1 Address 2 no. of trans	Duwa Duwa Duwa	ihos i Public Hospital	
		Code Charge to Name Address 1 Address 2	du du Du 2	W2		_ Ke	Code Charge to Name Address 1 Address 2	Duwa Duwa Duwa	ihos i Public Hospital	
		Code Charge to Name Address 1 Address 2 no, of trans	du du Du 2	wa wa wa regional hospital		⊖ Ke	Code Charge to Name Address 1 Address 2 no. of trans	Duwa Duwa Duwa	ihos i Public Hospital	
		Code Charge to Name Address 1 Address 2 no, of trans	du du Du 2	wa wa wa regional hospital		⊖ Ke	Code Charge to Name Address 1 Address 2 no. of trans	Duwa Duwa Duwa	ihos i Public Hospital	
ventura		Code Charge to Name Address 1 Address 2 no, of trans	du du Du 2	wa wa wa regional hospital		⊖ Ke	Code Charge to Name Address 1 Address 2 no. of trans	Duwa Duwa Duwa	ihos i Public Hospital	
		Code Charge to Name Address 1 Address 2 no, of trans	du du Du 2	wa wa wa regional hospital		⊖ Ke	Code Charge to Name Address 1 Address 2 no. of trans	Duwa Duwa Duwa	ihos i Public Hospital	
		Code Charge to Name Address 1 Address 2 no, of trans	du du Du 2	wa wa wa regional hospital		⊖ Ke	Code Charge to Name Address 1 Address 2 no. of trans	Duwa Duwa Duwa 0	ihos i Public Hospital	

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:

		Update	Apply to
Custom Code	ABC		Selected items
Quantity		2	<ul> <li>All items in list</li> </ul>
Insured			
Date established	4/04/20		
Programme	P1 3		
Fields with default (uncha	nged) values will be updated ᅌ	Cano	el 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			
		Cancel	ок

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:

0		Edit customer/supplier	
neral /oices ckorders	New customer1 Name	Contact	Store: General
iotes intacts oup rchase orders	Code new1 Charge to new1 Name New customer1	email web site Phone Fax	Currency USD C
n lists uisitions re to	Master ID 0 S	Status Price Category Hold A	Customer details Supplying store General  Printing Print invoices alphabetically
	Category Other Customer  Customer  Customer  Category 1 none Category 2 none Manufacturer  Category 3 none	Category 5 none	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
elete name	1	OK &	Next Cancel OK

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#### **Deleting names**

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If a name has transactions entered against it, you will not be able to uncheck the relevant 'Category' check box, 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.

eneral	AUPELIA	DERIC	CIR-D PUBLIC						6		
Invoices									Stor	e: District Sanita	ire 0
Backorders		_					_				
Quotes	-	Ŧ.			Filter	All	۵		Ov	erpayments	0.00
Notes	-	eing							Total of	outstanding	848,324.60
Contacts		, <b>j</b>									
Group	Ту	. 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.

🖢 Cu	isto	mer invoice	:							<b>-</b> ×
The	ir re	e 102824 f 102824 t tuesday (	cso4	Period	17/12/08 01/01/08 - None	31/12/08	•	I Entr Goods rece	nvoice : 3,040 y date : 16/12/08	Black
Ne	ew I		ete line(s) by Item Summary by Batch Transport de	Backo	· ·	History		Ente	red by: Pharmad Store: General	-
	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
E.	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
										Ŧ
4	G	) 🛃 🐺	Other charges Item:						nount:	0.00
	2		2						btotal:	22.36
								0	% tax: Total:	0.00 22.36
Ho Fir	old naliz	te 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.

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Cut off days     Outstanding totals       less than 30 days     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       Image: state of the s	Outstanding summ	ary – 🗆 🗙
less than 30 days     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	Cut off days	Outstanding totals
30 to 60 days 0 60 to 90 days 0 90 to 120 days 0 120 to 180 days 0 over 180 days 0 	-	
90 to 120 days 0 120 to 180 days 0 over 180 days 0 <		0
120 to 180 days 0 over 180 days 0 	60 to 90 days	0
over 180 days 0	90 to 120 days	0
	120 to 180 days	0
	over 180 days	0
	<	, ×
ОК		
		OK
di.		

#### Dates

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

## **Backorders tab**

Seneral nvoices Jackorders Duotes	•					Store: General V	i
lotes	New backo	order Delete backorder Copy	Print				
mails	Code	Item	Order date	Quantity	Stock	Comment	
roup	Lig11	Lignocaine 1% 20ml/50ml vial	22/02/11	5	10		
urchase orders	Cotsyr	Cotrimoxazole 240mg/5ml susp (100mL)	22/02/11	110	13816		
/eb log-in	Erysyr	Erythromycin 125mg/5ml susp (100mL)	22/02/11	8	3729		1.1
avourites	Flusyr	Flucloxacillin/Cloxacillin 125mg/5ml susp (1	22/02/11	10	11900		
ock history	Mebsyr	Mebendazole 100mg/5mls syrup (30mL)	22/02/11	10	0		
tore	Parsyr	Paracetamol 120mg/5mls syrup (mL)	22/02/11	20000	578050		
	Sal4	Salbutamol 4mg tab	22/02/11	400	50400		
	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	22/02/11	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.

<b>\$</b> -	New Backorder
Item	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.

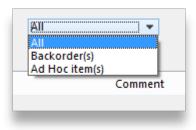
#### Viewing backorders

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**

Analistican - Banatis - Adr									Stor	e: [	General	- î	
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New Quote Delete Qu	uote	Sho	ow: All				•						
Item	Date	Cur	Rate	Price	Pac	Freight	S	Cost	Adj Cost	Pr	Valid Until	Comment	
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	=
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	1
Ranitidine 25mg/mL amp	25/02/09	NZD	0.7485	13.65	5	1.00		10.21	2.0434		20/03/09	NZ. Air freight	
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	
Amoxycillin+Clavulanate 500mg+1	25/02/09	NZD	0.7485	66.00	100	1.00		49.40	0.4940		20/03/09	unk brand, india. Air	
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		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 (PerV) 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	500	1.00		19.22	0.0384		30/04/09	AF Fiji (Apotex)	
Motoologyamida 10mg tab	21,02200	M7D	0.7406	7 90	100	1.00		E 07	0.0597		2010/10/00	AE	
	New Quote Delete Que Item Chloramphenicol 5% ear drops Phenytoin 50mg/ml amp Raritidine 25mg/mL amp Suxamethonium 100mg/2ml amp Amoxycilin+Clavulanate 500mg+1 Enalapril 5mg tab Griseofulvin 500mg tab Salbutamol 4mg tab Hydrocortisone 1% cream (15g tub Metformin 500mg tab Blood test strips - Advantage II (50 Naloxone 400mcg/ml amp Phenoxymethylpenicilin (PerV) 12 Captopril 25mg tab	Item         Date           New Quote         Delete Quote           Item         Date           Chloramphenicol 5% ear drops         25/02/09           Phenytoin 50mg/ml amp         25/02/09           Ranitidine 25mg/mL amp         25/02/09           Suxamethonium 100mg/2ml amp         25/02/09           Amoxycilin+Clavulanate 500mg+1         25/02/09           Griseofulvin 500mg tab         25/02/09           Sabutamol 4mg tab         25/02/09           Hydrocottisone 1% cream (15g tub         25/02/09           Blood test strips - Advantage II (50         12/03/09           Naloxone 400mcg/ml amp         31/03/09           Phenoxymethylpenicilin (PenV) 12         31/03/09	Item         Date         Cur           Chloramphenicol 5% ear drops         25/02/09         NZD           Phenytoin 50mg/ml amp         25/02/09         NZD           Rantitidine 25mg/ml, amp         25/02/09         NZD           Suxamethonium 100mg/2ml amp         25/02/09         NZD           Amoxycilin+Clavulanate 500mg+1         25/02/09         NZD           Enalapril 5mg tab         25/02/09         NZD           Sabutamol 4mg tab         25/02/09         NZD           Hydrocotisone 1% cream (15g tub         25/02/09         NZD           Blood test strips - Advantage I (50         12/03/08         NZD           Naloxone 400mcg/ml amp         31/03/08         NZD           Phenoxymethylpericilin (Perk/) 12         31/03/08         NZD	Item         Date         Cur         Rate           Chloramphenicol 5% ear diops         25/02/09         NZD         0.7485           Phenytoin 50mg/ml amp         25/02/09         NZD         0.7485           Rantitidine 25mg/mL amp         25/02/09         NZD         0.7485           Suxamethonium 100mg/2ml amp         25/02/09         NZD         0.7485           Sinseofulin+Clavulanate 500mg+1         25/02/09         NZD         0.7485           Griseofulvin 500mg tab         25/02/09         NZD         0.7485           Sabutamol 4mg tab         25/02/09         NZD         0.7485           Sabutamol 4mg tab         25/02/09         NZD         0.7485           Blood test strips - Advantage I (50         12/03/09         NZD         0.7485           Naloxone 400mcg/ml amp         31/03/09         NZD         0.7485           Naloxone 400mcg/ml amp         31/03/09         NZD         0.7485	Item         Date         Cur         Rate         Price           Chloramphenicol 5% ear drops         25/02/09         NZD         0.7485         3.55           Phenytoin 50mg/ml amp         25/02/09         NZD         0.7485         3.55           Phenytoin 50mg/ml amp         25/02/09         NZD         0.7485         115.0           Raritidine 25mg/ml. amp         25/02/09         NZD         0.7485         13.65           Suxamethonium 100mg/2ml amp         25/02/09         NZD         0.7485         230.3           Amoxycilin+Clavulanate 500mg+1         25/02/09         NZD         0.7485         310           Griseofulvin 500mg tab         25/02/09         NZD         0.7485         66.00           Enalapril 5mg tab         25/02/09         NZD         0.7485         97.00           Sabutamol 4mg tab         25/02/09         NZD         0.7485         97.00           Sabutamol 4mg tab         25/02/09         NZD         0.7485         31.00           Hydrocotisone 1% cream (15g tub         25/02/09         NZD         0.7485         32.52           Metformin 500mg tab         25/02/09         NZD         0.7485         32.52           Naloxone 400mog/ml amp         31/03/09 </td <td>Item         Date         Cur         Rate         Price         Pac           Chloramphenicol 5% ear drops         25/02/09         NZD         0.7485         3.55         1           Phenytoin 50mg/ml amp         25/02/09         NZD         0.7485         3.55         1           Phenytoin 50mg/ml amp         25/02/09         NZD         0.7485         13.65         5           Raritidine 25mg/ml, amp         25/02/09         NZD         0.7485         230.3         50           Amoxycilin+Clavulanate 500mg+1         25/02/09         NZD         0.7485         230.3         50           Amoxycilin+Clavulanate 500mg+1         25/02/09         NZD         0.7485         3.10         100           Griseofulvin 500mg tab         25/02/09         NZD         0.7485         3.10         100           Griseofulvin 500mg tab         25/02/09         NZD         0.7485         3.10         100           Sabutamol 4mg tab         25/02/09         NZD         0.7485         3.25         1           Metformin 500mg tab         25/02/09         NZD         0.7485         3.44         500           Blood test strips - Advantage I (50         12/03/09         NZD         0.7485         3.45<td>Item         Date         Cur         Rate         Price         Pac         Freight           Chloramphenicol 5% ear drops         25/02/09         NZD         0.7485         3.55         1         1.00           Phenytoin 50mg/ml amp         25/02/09         NZD         0.7485         115.0         5         1.00           Rantitidine 25mg/mL amp         25/02/09         NZD         0.7485         13.65         5         1.00           Suxamethonium 100mg/2ml amp         25/02/09         NZD         0.7485         13.65         5         1.00           Amoxycilin+Clavulanate 500mg+1         25/02/09         NZD         0.7485         3.10         100         1.00           Enalapril 5mg tab         25/02/09         NZD         0.7485         3.10         100         1.00           Gradaptine 500mg tab         25/02/09         NZD         0.7485         3.10         100         1.00           Gradaptine factores         25/02/09         NZD         0.7485         3.10         100         1.00           Gradaptine factores         25/02/09         NZD         0.7485         3.00         1.00           Sabutamol 4mg tab         25/02/09         NZD         0.7485         3</td><td>Item         Date         Cur         Rate         Price         Pac         Freight         S           Chloramphenicol 5% ear drops         25/02/09         NZD         0.7485         3.55         1         1.00         I           Phenytoin 50mg/ml amp         25/02/09         NZD         0.7485         3.55         1         1.00         I           Rantitidine 25mg/mL amp         25/02/09         NZD         0.7485         13.65         5         1.00         I           Suxamethonium 100mg/2ml amp         25/02/09         NZD         0.7485         13.65         5         1.00         I           Amoxycilin+Clavulanate 500mg+1         25/02/09         NZD         0.7485         3.10         100         I.00         I           Griseofulvin 500mg tab         25/02/09         NZD         0.7485         3.10         100         I.00         I</td><td>New Quote         Delete Quote         Show:         All           Item         Date         Cur         Rate         Price         Pac         Freight         S         Cost           Chloramphenicol 5% ear drops         25/02/09         NZD         0.7485         3.55         1         1.00         2         2.65           Phenytoin 50mg/ml amp         25/02/09         NZD         0.7485         13.65         5         1.00         86.12           Raritidine 25mg/mL amp         25/02/09         NZD         0.7485         13.65         5         1.00         10.21           Suxamethonium 100mg/2ml amp         25/02/09         NZD         0.7485         66.00         1000         1.00         172.38           Amoxycilin+Clavulanate 500mg+1         25/02/09         NZD         0.7485         66.00         1000         1.00         2.322           Griseofulvin 500mg tab         25/02/09         NZD         0.7485         3.10         100         1.00         2.328           Griseofulvin 500mg tab         25/02/09         NZD         0.7485         5.00         1.00         2.43           Metformin 500mg tab         25/02/09         NZD         0.7485         3.25         1</td><td>Item         Date         Cur         Rate         Price         Pac         Freight         S         Cost         Adj Cost           Chloramphenicol 5% ear drops         25/02/09         NZD         0.7485         3.55         1         1.00         2.65         2.6571           Phenytoin 50mg/ml amp         25/02/09         NZD         0.7485         3.55         1         1.00         2.65         2.6571           Phenytoin 50mg/ml amp         25/02/09         NZD         0.7485         13.65         5         1.00         86.12         17.2259           Raritidine 25mg/mL amp         25/02/09         NZD         0.7485         13.65         5         1.00         10.21         2.0434           Suxamethonium 100mg/2ml amp         25/02/09         NZD         0.7485         3.10         100         17.238         3.4477           Amoxycilin+Clavulanate 500mg+1         25/02/09         NZD         0.7485         3.10         100         49.40         0.4940           Enalapril 5mg tab         25/02/09         NZD         0.7485         3.10         100         2.32         0.0232           Gineofulvin 500mg tab         25/02/09         NZD         0.7485         3.00         1.00</td><td>New Quote         Delete Quote         Show:         All           Item         Date         Cur         Rate         Price         Pac         Freight         S         Cost         Adj Cost         Pri           Chloramphenicol 5% ear drops         25/02/09         NZD         0.7485         3.55         1         1.00         2.65         2.6571        </td><td>New Quote         Delete Quote         Show:         All           Item         Date         Cu         Rate         Price         Pac         Freight         S         Cost         Adj Cost         Pr         Valid Unbil            Chloramphenicol 5% ear drops         25/02/09         NZD         0.7485         3.55         1         1.00         2.65         2.6571         20/03/09           Phenytoin 50mg/ml amp         25/02/09         NZD         0.7485         13.65         5         1.00         86.12         17.2259         20/03/09           Raritidine         25mg/mL amp         25/02/09         NZD         0.7485         13.65         5         1.00         10.21         2.0434         20/03/09           Suxamethonium 100mg/2ml amp         25/02/09         NZD         0.7485         66.00         100         1.00         49.40         0.4940         20/03/09           Amoxycilin+Clavulanate 500mg+1         25/02/09         NZD         0.7485         3.10         100         1.00         2.32         0.0232         20/03/09           Griseofulvin 500mg tab         25/02/09         NZD         0.7485         3.10         100         1.00         2.43         2.4326</td><td>Item         Delete Quote         Show:         All           Item         Delete Quote         Show:         All         Item         Comment           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           Phenytoin 50mg/ml amp         25/02/09         NZD         0.7485         1.55         1.00         2.65         2.6571         20/03/09         NZ. Air freight           Rartidine Z5mg/mL amp         25/02/09         NZD         0.7485         13.65         5         1.00         10.21         2.0434         20/03/09         NZ. Air freight           Suxamethonium 100mg/2ml amp         25/02/09         NZD         0.7485         13.65         5         1.00         10.21         2.0434         20/03/09         NZ. Air freight           Amoxycilin+Clavulanate 500mg+1         25/02/09         NZD         0.7485         3.10         100         1.00         2.32         0.0232         20/03/09         urk brand, india. air           Griseolutvin 500mg tab         25/02/09         NZD         0.7485         3.10         100         1.00         2.32         0.0232         20/03/09         <t< td=""></t<></td></td>	Item         Date         Cur         Rate         Price         Pac           Chloramphenicol 5% ear drops         25/02/09         NZD         0.7485         3.55         1           Phenytoin 50mg/ml amp         25/02/09         NZD         0.7485         3.55         1           Phenytoin 50mg/ml amp         25/02/09         NZD         0.7485         13.65         5           Raritidine 25mg/ml, amp         25/02/09         NZD         0.7485         230.3         50           Amoxycilin+Clavulanate 500mg+1         25/02/09         NZD         0.7485         230.3         50           Amoxycilin+Clavulanate 500mg+1         25/02/09         NZD         0.7485         3.10         100           Griseofulvin 500mg tab         25/02/09         NZD         0.7485         3.10         100           Griseofulvin 500mg tab         25/02/09         NZD         0.7485         3.10         100           Sabutamol 4mg tab         25/02/09         NZD         0.7485         3.25         1           Metformin 500mg tab         25/02/09         NZD         0.7485         3.44         500           Blood test strips - Advantage I (50         12/03/09         NZD         0.7485         3.45 <td>Item         Date         Cur         Rate         Price         Pac         Freight           Chloramphenicol 5% ear drops         25/02/09         NZD         0.7485         3.55         1         1.00           Phenytoin 50mg/ml amp         25/02/09         NZD         0.7485         115.0         5         1.00           Rantitidine 25mg/mL amp         25/02/09         NZD         0.7485         13.65         5         1.00           Suxamethonium 100mg/2ml amp         25/02/09         NZD         0.7485         13.65         5         1.00           Amoxycilin+Clavulanate 500mg+1         25/02/09         NZD         0.7485         3.10         100         1.00           Enalapril 5mg tab         25/02/09         NZD         0.7485         3.10         100         1.00           Gradaptine 500mg tab         25/02/09         NZD         0.7485         3.10         100         1.00           Gradaptine factores         25/02/09         NZD         0.7485         3.10         100         1.00           Gradaptine factores         25/02/09         NZD         0.7485         3.00         1.00           Sabutamol 4mg tab         25/02/09         NZD         0.7485         3</td> <td>Item         Date         Cur         Rate         Price         Pac         Freight         S           Chloramphenicol 5% ear drops         25/02/09         NZD         0.7485         3.55         1         1.00         I           Phenytoin 50mg/ml amp         25/02/09         NZD         0.7485         3.55         1         1.00         I           Rantitidine 25mg/mL amp         25/02/09         NZD         0.7485         13.65         5         1.00         I           Suxamethonium 100mg/2ml amp         25/02/09         NZD         0.7485         13.65         5         1.00         I           Amoxycilin+Clavulanate 500mg+1         25/02/09         NZD         0.7485         3.10         100         I.00         I           Griseofulvin 500mg tab         25/02/09         NZD         0.7485         3.10         100         I.00         I</td> <td>New Quote         Delete Quote         Show:         All           Item         Date         Cur         Rate         Price         Pac         Freight         S         Cost           Chloramphenicol 5% ear drops         25/02/09         NZD         0.7485         3.55         1         1.00         2         2.65           Phenytoin 50mg/ml amp         25/02/09         NZD         0.7485         13.65         5         1.00         86.12           Raritidine 25mg/mL amp         25/02/09         NZD         0.7485         13.65         5         1.00         10.21           Suxamethonium 100mg/2ml amp         25/02/09         NZD         0.7485         66.00         1000         1.00         172.38           Amoxycilin+Clavulanate 500mg+1         25/02/09         NZD         0.7485         66.00         1000         1.00         2.322           Griseofulvin 500mg tab         25/02/09         NZD         0.7485         3.10         100         1.00         2.328           Griseofulvin 500mg tab         25/02/09         NZD         0.7485         5.00         1.00         2.43           Metformin 500mg tab         25/02/09         NZD         0.7485         3.25         1</td> <td>Item         Date         Cur         Rate         Price         Pac         Freight         S         Cost         Adj Cost           Chloramphenicol 5% ear drops         25/02/09         NZD         0.7485         3.55         1         1.00         2.65         2.6571           Phenytoin 50mg/ml amp         25/02/09         NZD         0.7485         3.55         1         1.00         2.65         2.6571           Phenytoin 50mg/ml amp         25/02/09         NZD         0.7485         13.65         5         1.00         86.12         17.2259           Raritidine 25mg/mL amp         25/02/09         NZD         0.7485         13.65         5         1.00         10.21         2.0434           Suxamethonium 100mg/2ml amp         25/02/09         NZD         0.7485         3.10         100         17.238         3.4477           Amoxycilin+Clavulanate 500mg+1         25/02/09         NZD         0.7485         3.10         100         49.40         0.4940           Enalapril 5mg tab         25/02/09         NZD         0.7485         3.10         100         2.32         0.0232           Gineofulvin 500mg tab         25/02/09         NZD         0.7485         3.00         1.00</td> <td>New Quote         Delete Quote         Show:         All           Item         Date         Cur         Rate         Price         Pac         Freight         S         Cost         Adj Cost         Pri           Chloramphenicol 5% ear drops         25/02/09         NZD         0.7485         3.55         1         1.00         2.65         2.6571        </td> <td>New Quote         Delete Quote         Show:         All           Item         Date         Cu         Rate         Price         Pac         Freight         S         Cost         Adj Cost         Pr         Valid Unbil            Chloramphenicol 5% ear drops         25/02/09         NZD         0.7485         3.55         1         1.00         2.65         2.6571         20/03/09           Phenytoin 50mg/ml amp         25/02/09         NZD         0.7485         13.65         5         1.00         86.12         17.2259         20/03/09           Raritidine         25mg/mL amp         25/02/09         NZD         0.7485         13.65         5         1.00         10.21         2.0434         20/03/09           Suxamethonium 100mg/2ml amp         25/02/09         NZD         0.7485         66.00         100         1.00         49.40         0.4940         20/03/09           Amoxycilin+Clavulanate 500mg+1         25/02/09         NZD         0.7485         3.10         100         1.00         2.32         0.0232         20/03/09           Griseofulvin 500mg tab         25/02/09         NZD         0.7485         3.10         100         1.00         2.43         2.4326</td> <td>Item         Delete Quote         Show:         All           Item         Delete Quote         Show:         All         Item         Comment           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           Phenytoin 50mg/ml amp         25/02/09         NZD         0.7485         1.55         1.00         2.65         2.6571         20/03/09         NZ. Air freight           Rartidine Z5mg/mL amp         25/02/09         NZD         0.7485         13.65         5         1.00         10.21         2.0434         20/03/09         NZ. Air freight           Suxamethonium 100mg/2ml amp         25/02/09         NZD         0.7485         13.65         5         1.00         10.21         2.0434         20/03/09         NZ. Air freight           Amoxycilin+Clavulanate 500mg+1         25/02/09         NZD         0.7485         3.10         100         1.00         2.32         0.0232         20/03/09         urk brand, india. air           Griseolutvin 500mg tab         25/02/09         NZD         0.7485         3.10         100         1.00         2.32         0.0232         20/03/09         <t< td=""></t<></td>	Item         Date         Cur         Rate         Price         Pac         Freight           Chloramphenicol 5% ear drops         25/02/09         NZD         0.7485         3.55         1         1.00           Phenytoin 50mg/ml amp         25/02/09         NZD         0.7485         115.0         5         1.00           Rantitidine 25mg/mL amp         25/02/09         NZD         0.7485         13.65         5         1.00           Suxamethonium 100mg/2ml amp         25/02/09         NZD         0.7485         13.65         5         1.00           Amoxycilin+Clavulanate 500mg+1         25/02/09         NZD         0.7485         3.10         100         1.00           Enalapril 5mg tab         25/02/09         NZD         0.7485         3.10         100         1.00           Gradaptine 500mg tab         25/02/09         NZD         0.7485         3.10         100         1.00           Gradaptine factores         25/02/09         NZD         0.7485         3.10         100         1.00           Gradaptine factores         25/02/09         NZD         0.7485         3.00         1.00           Sabutamol 4mg tab         25/02/09         NZD         0.7485         3	Item         Date         Cur         Rate         Price         Pac         Freight         S           Chloramphenicol 5% ear drops         25/02/09         NZD         0.7485         3.55         1         1.00         I           Phenytoin 50mg/ml amp         25/02/09         NZD         0.7485         3.55         1         1.00         I           Rantitidine 25mg/mL amp         25/02/09         NZD         0.7485         13.65         5         1.00         I           Suxamethonium 100mg/2ml amp         25/02/09         NZD         0.7485         13.65         5         1.00         I           Amoxycilin+Clavulanate 500mg+1         25/02/09         NZD         0.7485         3.10         100         I.00         I           Griseofulvin 500mg tab         25/02/09         NZD         0.7485         3.10         100         I.00         I	New Quote         Delete Quote         Show:         All           Item         Date         Cur         Rate         Price         Pac         Freight         S         Cost           Chloramphenicol 5% ear drops         25/02/09         NZD         0.7485         3.55         1         1.00         2         2.65           Phenytoin 50mg/ml amp         25/02/09         NZD         0.7485         13.65         5         1.00         86.12           Raritidine 25mg/mL amp         25/02/09         NZD         0.7485         13.65         5         1.00         10.21           Suxamethonium 100mg/2ml amp         25/02/09         NZD         0.7485         66.00         1000         1.00         172.38           Amoxycilin+Clavulanate 500mg+1         25/02/09         NZD         0.7485         66.00         1000         1.00         2.322           Griseofulvin 500mg tab         25/02/09         NZD         0.7485         3.10         100         1.00         2.328           Griseofulvin 500mg tab         25/02/09         NZD         0.7485         5.00         1.00         2.43           Metformin 500mg tab         25/02/09         NZD         0.7485         3.25         1	Item         Date         Cur         Rate         Price         Pac         Freight         S         Cost         Adj Cost           Chloramphenicol 5% ear drops         25/02/09         NZD         0.7485         3.55         1         1.00         2.65         2.6571           Phenytoin 50mg/ml amp         25/02/09         NZD         0.7485         3.55         1         1.00         2.65         2.6571           Phenytoin 50mg/ml amp         25/02/09         NZD         0.7485         13.65         5         1.00         86.12         17.2259           Raritidine 25mg/mL amp         25/02/09         NZD         0.7485         13.65         5         1.00         10.21         2.0434           Suxamethonium 100mg/2ml amp         25/02/09         NZD         0.7485         3.10         100         17.238         3.4477           Amoxycilin+Clavulanate 500mg+1         25/02/09         NZD         0.7485         3.10         100         49.40         0.4940           Enalapril 5mg tab         25/02/09         NZD         0.7485         3.10         100         2.32         0.0232           Gineofulvin 500mg tab         25/02/09         NZD         0.7485         3.00         1.00	New Quote         Delete Quote         Show:         All           Item         Date         Cur         Rate         Price         Pac         Freight         S         Cost         Adj Cost         Pri           Chloramphenicol 5% ear drops         25/02/09         NZD         0.7485         3.55         1         1.00         2.65         2.6571	New Quote         Delete Quote         Show:         All           Item         Date         Cu         Rate         Price         Pac         Freight         S         Cost         Adj Cost         Pr         Valid Unbil            Chloramphenicol 5% ear drops         25/02/09         NZD         0.7485         3.55         1         1.00         2.65         2.6571         20/03/09           Phenytoin 50mg/ml amp         25/02/09         NZD         0.7485         13.65         5         1.00         86.12         17.2259         20/03/09           Raritidine         25mg/mL amp         25/02/09         NZD         0.7485         13.65         5         1.00         10.21         2.0434         20/03/09           Suxamethonium 100mg/2ml amp         25/02/09         NZD         0.7485         66.00         100         1.00         49.40         0.4940         20/03/09           Amoxycilin+Clavulanate 500mg+1         25/02/09         NZD         0.7485         3.10         100         1.00         2.32         0.0232         20/03/09           Griseofulvin 500mg tab         25/02/09         NZD         0.7485         3.10         100         1.00         2.43         2.4326	Item         Delete Quote         Show:         All           Item         Delete Quote         Show:         All         Item         Comment           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           Phenytoin 50mg/ml amp         25/02/09         NZD         0.7485         1.55         1.00         2.65         2.6571         20/03/09         NZ. Air freight           Rartidine Z5mg/mL amp         25/02/09         NZD         0.7485         13.65         5         1.00         10.21         2.0434         20/03/09         NZ. Air freight           Suxamethonium 100mg/2ml amp         25/02/09         NZD         0.7485         13.65         5         1.00         10.21         2.0434         20/03/09         NZ. Air freight           Amoxycilin+Clavulanate 500mg+1         25/02/09         NZD         0.7485         3.10         100         1.00         2.32         0.0232         20/03/09         urk brand, india. air           Griseolutvin 500mg tab         25/02/09         NZD         0.7485         3.10         100         1.00         2.32         0.0232         20/03/09 <t< td=""></t<>

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:

eral	Multichem Exports			Store: General	-	i
orders tes	New Note	Delete Note				
tacts	Date		Note			
ls	03/06/11	Open day - 1 July 2011, 10:00-20:00				
р						
ase orders						
log-in urites						
history						
2			_	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	ustomer/Supplier notes	x
Date	01/12/11 Entered by: Sussol Modfied by:	
Note	Closed for stocktaking - 30/31 December	^
		-
Display	when Puichase Order is created Pick Color Beep 0 times never all Supplier Invoice is created Goods Receipt is created Customer Invoice is created Customer Invoice is created	

- 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**

ontacts roup urchase orders	First	Last				
em lists equisitions tore hoto		Last	Position	Email	Phone	Category

#### Adding contact

To add a contact for this customer or supplier, click the **Add contact** button , then enter the details in the window that appears.

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	
fo if related to a customer or supplier	
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	Item departments which can be supplied to this group.	
Emails	Item departments	
Group		
Purchase orders		
Web log-in		
Favourites		
stock history		
Store		
	Warning: setting a customer group can affect which items can be supplied	to them
	training second group can arrest which tens can be supplied	
		OF 5 Mart Crock OF
		OK & Next Cancel OK
		OK & Next Cancel OK
Grad	ups are only relevant to customers, not supp	

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...

c	ustomer gr Item depar	oup none none rtmen hospital > 50 beds hospital < 50 beds Urban clinic Rural clinic MCH clinic Island health post	o this 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**

al es	Internatio	onal Dispens	sary Associatio	0			Store: General	Ŧ	i
es rders									_
es ets		o Status 00 sg	Date 17/12/08		Target days 0		Comment NON-DRUGS IDA ORDER 1		*
)	1	23 cn 93 fn	28/01/09 24/06/09		0	110	KIRDRUGTENDER 1 Tender 09 part 2		
ase orders og-in rites	2	25 cn 91 cn 58 cn	25/03/10 05/01/10 20/07/10	1	0 21 0	50	Controlled Drugs Order AF - Tender2010 Drug Order July 2010 AF		
history	4	04 cn 10 cn	15/12/10 15/12/10		0	23 101	IDA Tender Order Air freight IDA Tender Order Sea Freight		
		24 sg 32 cn	22/03/11 30/06/11		0		PO generated for tender number: 23 No of PO Lines 1		
									-
	-			-		-	m		•

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

## Web log-in tab

tedit customer/s	upplier	
General Invoices Backorders	International Dispensary Associatio	Store: General 👻
Quotes Notes	Customer / Supplier user name	
Contacts Emails	Reset customer password	
Group 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

neral oices	checkitem								Store		-
korders otes	Item lists attached to this n	ame						tems	1	Default Order Days	0
tes ntacts nup chase Orders	Add master Delete ik ist							Item code		Item name	~
Hem List Requisitions Store Visibility Photo Custom data Log Tags	List name	Master list	Imprest	Stock Takes	Web	Price	× ×				
	< Style Sort by Group		utput to Printer C Excel		Gener		Orderia	ng method nprest tocktakes			v

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	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		
mails	2106	19/05/10		sg		im		
roup	2479	08/08/10	08/08/10	cn		im		
urchase orders	3008	25/11/10	25/11/10	cn		im		
/eb log-in								
avourites								
tock history								
tore								
								-

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

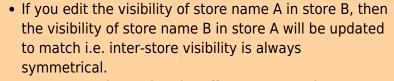
#### Updated version 4.12

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
Quotes		Stores	Visible in store
Notes	General		
Contacts	Registration		
Group	Test dispensary		ň
Purchase Orders			
Item List			
Requisitions			
Store Visibility			
Photo			
Custom data			
Log			
Supplier Hub Tags			
rags			
	All on Copy Pa	Ste 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.



- However, when using the All on, Copy and Paste buttons, only the stores that you have permission to login to, and edit name visibility in, will be affected. If you do not have permission to login or edit name visibility in a store then the state of its Visible in store checkbox will not change.
- If you are using a syncing system, and editing visibility for a store name, that can affect the sync settings for the store on other sites i.e. if you make it invisible to all stores which are **Active** on a site, then the sync status will become **None** on that site; and if you make it visible to at least one store which is **Active** on a site, then the sync status will become **Transfer** on that site

- see Store sync-with options.

In a syncing system, facility names (customers, suppliers, etc.) can only be created and edited on the primary server. Patients can be created in any dispensary, including on a sync site. After that, their visibility is controlled on the central server (after they sync there) in the same way as other names, so everything on this tab (including the All on, Copy and Paste buttons) will be read only on a sync satellite.

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

- its home store (the store that you are logged into when the name is created; see Home store for details), and
- any other stores *if* their store preference Names created in other stores not visible in this store is switched OFF (there's an equivalent store preference for patients, which can be switched OFF to make new patients visible in other dispensary stores) - see Store preferences for more details.

## Photo tab

On this tab you can assign a photo of the customer or supplier and set their world map coordinates. Both of these can be used in reports.

•••			Edit customer	/supplier				
General Invoices Backorders	Test customer 01					Store: Central Contra	ceptiv ¢	•
Backorders Quotes Notes Contacts Group Purchase Orders Item List Requisitions Store Visibility Photo Custom data Log mSupply Link Tags	Add photo	Delete Photo		0 КЬ	Map coordinates: Lat Long		0	
					OK & N	ext Cancel		DK

#### 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.

## **Custom data tab**

	Edit custome	er/supplier
General	Test customer 01	Store: Ceneral ©
Invoices		
Backorders	New field 1	
Quotes		
Notes	New field 2	0
Contacts	N	
Group	New field 3	
Purchase Orders	New field 4 00/00/00	
Item List		
Requisitions	New field 5	0
Store Visibility		
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

eneral					Edit customer/				5
veneral nvoices	Test	Test customer 01					Store: General 0		
ackorders		Date	Time	User	Event type		Event		
Juotes		04/05/2021	15:44:08		Create name	Name created	Event		
lotes		04/03/2021	12:44:08	565501	Create name	Name created			
ontacts									
roup									
urchase Orders									
tem List									
equisitions									
tore Visibility									
hoto									
ustom data									
og									
upplier Hub									
ags									
		_							
							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

Last update: 2022/01/27 23:13 names:adding\_and\_editing https://docs.msupply.org.nz/names:adding\_and\_editing?rev=1643325190

• • •		Edit customer/supplier
General Invoices Backorders	Test customer 01 Hub Registration	Store: General O
Quotes	The Registration	
Notes		
Contacts		
Group		
Purchase Orders		
Item List		
Requisitions	Site Nar	пе
Store Visibility		
Photo		
Custom data		
Log		Register
Supplier Hub		
Tags		
1025		
		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.

		Edit customer/supplier	
General	Test customer 01		Store: General ©
Invoices			
Backorders			
Quotes	Tags CustomerTag01	Use	
lotes			
ontacts	CustomerTag02		
roup	SupplierTag01		
urchase Orders	SupplierTag02		
em List			
equisitions			
tore Visibility			
hoto			
ustom data			
9			
upplier Hub			
ags			
			OK & Next Cancel OK
			UK & Next Cancel UK

## 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.

**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.

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

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Last update: 2022/01/27 23:13