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 Code Charge to Charge to Type Facility	5	Contact emai web site Phone Fax Status H		Price Category	Store: General C Currency USD C Customer details Supplying store General Printing	
Category O Customer Supplier Manufacturer Benchmark	ther Category 1 None Category 2 None Category 3 None Category 4 None	6	Category S Category 6 State/Region Flag	None None	Print invoices alphabetica Custom 1 Custom 2 Custom 3 Comment	шу
Main/Billing Address Address 1 Address 2 Address 3 Address 4 Address 5 Post code Country		Posta	I 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.

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 (_).

HSH code & HSH name

These are used when using the Health Supply Hub (replacement for the Remote tender module - see the Health Supply Hub page for details) to link suppliers with their record on the Health Supply Hub server and maintained by The mSupply Foundation. If your system does not use the Health Supply Hub, then you can ignore these fields.

To link a supplier to one already entered in the Health Supply Hub:

- 1. set your Health Supply Hub preferences (16.01. General preferences)
- 2. click on the padlock icon next to the **HSH code field** to unlock it and enable the 🖾 button.
- 3. click on the 뛀 button.

mSupply will then search for a supplier in the Health Supply Hub with a name with a matching first letter. A window like this opens:

Quick search S			
Code	Supplier Name		

If the correct supplier is not shown in the list then clear the contents of the **Quick search** field. All suppliers registered on the Health Supply Hub are then displayed. You can refine the search by typing something in the **Quick search** field and only suppliers with names that begin with what you typed will be displayed.

When you see the supplier name that you wish to connect to the supplier in mSupply, double-click on it to select it; the Health Supply Hub code of the supplier will be put in the **HSH code** field and the

supplier's Health Supply Hub name will be shown in the **HSH name** field.

It the search is unsuccessful or there is a problem connecting to the Health Supply Hub, you will be shown an appropriate message.

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).

Custom fields

Custom fields are similar to Category fields, the main difference being that these fields are not validated using a drop-down list, and so can't be reliably used for categorisation.

Analysis

You can use this field to group together certain types of customers or suppliers. You can filter the report by selecting the group in the *Analysis* field.

Postal address

Here you can enter a postal address if it is different to the physical address of the supplier.

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 custor	ners	
Normal O	F	uzzy	
Name filter			
Name	contains		
and ᅌ	District ᅌ is		
and	Customer group is	Don't Care	0
Search			
All names	Manufact	urers	
Selection	O Donors		
Customers	s 🗸 Exclude p	atients	
Suppliers			
Exclude hidden na	mes		
	Complex Find	Cancel	Find

- The **slide bar** at the top of the window may be set to Normal, at the left, or at intermediate points towards the Fuzzy end (right); this determines the accuracy of matching your entry; when set to Normal, the search will only match exactly what has been entered; when set at Fuzzy the search will list entries which are approximate matches to what has been entered. The accuracy with which the list matches the entry is determined by the position of the slider.
- If you leave the Name/Code text field empty, clicking the Find button will produce a full list of

all customers.

- You can enter values for the other filters too (or them only!) if you want to refine your search.
- Note that the window has a series of radio buttons to select the target of your search All names, Customers, Suppliers, Manufacturers, etc. So even if you start this search from, say, Customer > Show Customers..., by selecting the Suppliers radio button, you can search in suppliers rather than customers.
- The **Exclude patients** checkbox is checked by default and means that any patients you have in your datafile will not be included in the search. If you uncheck it, any patients in the current store will be included in the search.
- The **Exclude hidden names** checkbox is checked by default and means that any names hidden in your store (but probably visible in other stores) will not be included in the search. If you uncheck this box then the search will include all names in all stores, and their visibility will be ignored.

If the search finds only one name that matches the filter criteria you entered, its details window will be displayed. If more than one name matches then you are shown a list of them all

							Names					
2		!	=]		¥		1				21/60
New	Modify	Set flags	Print Find		Order by	Merge	Labels	Report	Custom data	Customise		
Code		Charge to	Name		Addre	ess 1	Address	: 2	Currency	Category 1	Flags	Custom Data
ALD		MCG	Alders Store		12 Excellence	Lane	Russia		USD			
AMN		AMN	Amnesty Hospital		100 Christma	is 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	ıd	Brazil		USD			
camelrefhosp		camelrefhosp	Camelbak Refeospital (St	tore)	Australia				AUD	Baure)		{"Custom Code":{"data":"ABC"},"Insured":{"data":1}}
DIL-020-N		DIL-020-N	National Health Laboratori	ies	East Dili, CRIS	STO REI	DILI		USD	DILI		
Elm		Elm	Elm Pharma		897 Diagon A	dlv	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.

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Print

Clicking this button will print a list similar to the one displayed on screen.

Find

This button shows the same find window as choosing the menu item did so you can find a different group of names.

Order by

This button allows you to sort the displayed list by the criteria you choose. The Labels and Print buttons will use the order that is displayed. By default, names are displayed alphabetically based on the name column.

Merge

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

					Names lis	t				
New	6	odify Set flags	Print		Order by	Merge	Labels	Report	Customise	11/22
Code	Charge	Name		Address 1		Address 2	Category 1	Flags	Phone	
albert	albert	Albert Young memoria	l hospital			71001022	caregory 1	, ago	- none	
ballh	ballh	Ballance Mem Hosp		Lazimpat	Kathn	andu			977-1-529933	
claus	claus	Clauss Memorial healt	h centre							
duwa	duwa	Duwa regional hospita	ıl							
Duwahos	Duwahos	Duwa Public Hospital								
garg	garg	Gargan zonal hospital								
Med	Med 🔴	•			Merg	ge names				
pharam	phai									
pleb	pleb									
royal	roya	О Кеер				ОКе		Haras		
ventura	vent	U Keep	Merge				ep 🖸	Merge		
		Code	du	*0			Code	Duwa		
		Charge to					Charge to	Duwa		
		Name		wa regional hospital			Name		Public Hospital	
		Address 1					Address 1			
		Address 2					Address 2			
		no, of trans					no, of trans			
		last trans		/10/2006			last trans			
								Ce	incel C	к

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	O All items in list
Insured			
Date established	4/04/20		
Programme	P1	>	
Fields with default (uncha	nged) values will be updated	≎ Car	ncel 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:

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

Deleting names

Click on the **Delete** button in the bottom left hand corner to delete the name.

If a name has transactions entered against it, you will not be able to uncheck the relevant check box in the *Category* section, and you will not be able to delete it. For example, if a supplier has invoices entered against it, you will not be able to uncheck the **Supplier** check box, and you will not be able to delete the supplier.

Putting a name on Hold

If you wish to prevent future transactions with a name, change it's status to on 'Hold'.

Invoices tab

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

General	ALC: NO.	DIRG	CIR-D PUBLIC								
Invoices			Carl o rankon						Stor	e: District Sanitai	ire 0
Backorders											_
Quotes		Ŧ.			Filter	All	0		Ov	erpayments	0.00
Notes		geing							Total o	outstanding	848,324.60
Contacts	~	penng									
Group	Ty.	. St	Entry dt	Confirm dt	inv num	Their ref	Comment	Total	Currency	Total (local c	Outstanding
Purchase Orders	ci	sg	18/03/2020		7		Web order:	0.00	XOF	0	0.00
tem List	ci	fn	06/06/2019	06/06/2019	20		Facture ddu client	0.00	XOF	176725	0.00
Requisitions	ci	fn	06/06/2019	06/06/2019	23		Facture ddu client	0.00	XOF	0	0.00
store	ci	fn	06/06/2019	06/06/2019	24		Facture ddu client	0.00	XOF	0	0.00
Photo	ci	fn	17/06/2019	17/06/2019	125		Facture ddu client	0.00	XOF	0	0.00
Custom data	ci	fn	26/06/2019	26/06/2019	175		Facture ddu client	0.00	XOF	0	0.00
Log	ci	fn	12/07/2019	12/07/2019	239		Facture ddu client	0.00	XOF	0	0.00
Supplier Hub	ci	fn	12/07/2019	12/07/2019	240		Facture ddu client	0.00	XOF	134680	0.00
	ci	fn	15/07/2019	15/07/2019	244		ALLOCAEMENT)	167,180.00	XOF	167180	167,180.00
	ci	fn	15/07/2019	15/07/2019	245		PNSME	6,625.00	XOF	6625	6,625.00
	ci	fn	15/07/2019	15/07/2019	246		PNSME (K+ ZINC)	0.00	XOF	0	0.00
	ci	fn	15/07/2019	15/07/2019	247		PNLS_TRC	0.00	XOF	0	0.00
	ci	fn	22/07/2019	22/07/2019	304		GTC	30,000.00	XOF	30000	30,000.00
	ci	fn	24/07/2019	24/07/2019	344		MEDICAINTRANTS	0.00	XOF	0	0.00
	ci	fn	13/08/2019	13/08/2019	431		GTC	53,400.00	XOF	53400	53,400.00
	ci	fn	16/08/2019	16/08/2019	462		GTC	0.00	XOF	90510	0.00
	ci	fn	16/08/2019	16/08/2019	465		DOTATION ARV	0.00	XOF	0	0.00
	ci	fn	19/08/2019	19/08/2019	469		COMPLETION ARV	0.00	XOF	0	0.00
	ci	fn	19/08/2019	20/08/2019	468			0.00	XOF	0	0.00
	ci	fn	26/08/2019	26/08/2019	509		MEDICANTS PNLP	0.00	XOF	0	0.00
	ci	fn	10/09/2019	10/09/2019	550		MEDICANTS_PNLP	0.00	XOF	0	0.00
	ci	fn	10/09/2019	10/09/2019	551		MEDICATS_PNSME	0.00	XOF	0	0.00
	ci	fn	09/09/2019	11/09/2019	542		MEDICAINTRANTS	296.199.60	XOF	296199.6	296.199.60

Note that the *Total outstanding* field shows a customer's payment balance and is only shown if the customer receipts module is turned on (see 11.02. Receiving payments from customers).

You are able to edit an invoice directly from this window by double-clicking the one you wish to edit. A new window will open with the invoice details displayed.

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🖢 Ci	usto	mer invoice	:							×
			annia - anni	Confirm date	17/12/08	21/12/02	•			Black
The	eir re	f 102824	C504	Period	01/01/08 -	51/12/00	•		Invoice: 3,040	
Com	men	t tuesday (order 👢	Category	None		-	En	try date : 16/12/08	3
								Goods re	ceive ID: 0	
			-						Status : cn	
	R.		6.	1	*					
N	ew I	ine Del	ete line(s)	Backo	rders I	History		Ent	tered by: Pharmad	cy assistant
Gen	eral	Summary	by Item Summary by Batch Transport of	details					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
2	2	NON	Gauze swab 8ply 10cmx10cm	3	1			4.58		13.76
Ľ	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
	G	N 💌 🗷	Other charges Item	6				,	Amount:	0.00
			J					S	ubtotal:	22.36
									0 % tax:	0.00
									Total:	22.36
Line 4	old naliz	te Expo	ort batch: 0			OK & Next		Delete	ОК	8

Buttons on the Invoices tab

Print Range

Click this button to print a range of invoices for a customer. You will be asked to enter the first and last invoice numbers to be printed.

Aging

Click this button to display a list of aging categories and the outstanding unpaid balance for each invoice in each category.

🐅 Outstanding summa	ary – 🗆 🗙
Cut off days	Outstanding totals
less than 30 days	0 ^
30 to 60 days	0
60 to 90 days	0
90 to 120 days	0
120 to 180 days	0
over 180 days	0
	×
<	>
	OK

Dates

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

Backorders tab

Quotes		X	•			(All 🔹	
lotes I	New backo	rder Delete backorder Copy	Print				
mails	Code	Item	Order date	Quantity	Stock	Comment	
iroup	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		101010
avourites	Flusyr	Flucloxacillin/Cloxacillin 125mg/5ml susp (1	22/02/11	10	11900		
tock history	Mebsyr	Mebendazole 100mg/Smls syrup (30mL)	22/02/11	10	0		
tore	Parsyr	Paracetamol 120mg/5mls syrup (mL)	22/02/11	20000	578050		
2 State 1	Sal4	Salbutamol 4mg tab	22/02/11	400	50400		1000
	Amo500	Amoxycillin 500mg cap	22/02/11	3000	723000		
202 (22)	Flu500	Flucloxacillin/Cloxacillin 500mg cap	22/02/11	2000	4700		1.0.0
	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.

\$ •	New Backorder
Customer Item Order date Quantity Comment	Leaf Surgical supplies 23/03/2015 0
Comment	Cancel OK

- Type at least a portion of the item code or item name, then press the Tab key.
- Today's date is automatically entered. You can change the date if you like
- Enter the total quantity owing.
- Enter a comment (e.g. an expected arrival date)
- Click OK to save changes and exit the window.

Delete backorder

Click a backorder line to highlight it, then click this button to delete the line. You can also select several at once (using *ctrl/cmd+click* and *shift+click*) or all the backorders in the list using *ctrl/cmd+a* and delete them at once as well.

Сору

This command copies the backorder to the clipboard, allowing you to paste the report into an email message, word processor or spreadsheet document.

Print

The list of backordered items for the customer is printed.

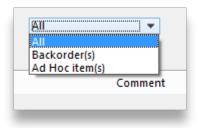
Viewing backorders

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

you can change any details you wish.

Show

This drop-down list allows you to choose which backorders to display.



- Backorders are normal items that have not been supplied to customers.
- Ad Hoc items are items that customers have ordered but which you do not want to add to your stock list, rather making a special order just for that customer.

Quotes tab

General Invoices	And									Stor	e: 🤇	Seneral	- I)	
Backorders														
Duotes	💿 🗱													
Notes Contacts	New Quote Delete Qu	uote	Sho	ow: All				•						
Emails	Item	Date	Cur	Rate	Price	Pac	Freight	S	Cost	Adj Cost	Pr	Valid Until	Comment	
roup	Chloramphenicol 5% ear drops	25/02/09	NZD	0.7485	3.55	1	1.00		2.65	2.6571		20/03/09	NZ. Air freight	=
urchase orders	Phenytoin 50mg/ml amp	25/02/09	NZD	0.7485	115.0	5	1.00		86.12	17.2259		20/03/09	250mg/5ml. NZ. Air freigh	
Veb log-in	Banitidine 25mg/mL amp	25/02/09	NZD	0.7485	13.65	5	1.00	-	10.21	2.0434		20/03/09	NZ. Air freight	
avourites	Suxamethonium 100mg/2ml amp	25/02/09	NZD	0.7485	230.3	50	1.00		172.38	3.4477		20/03/09	NZ. Air freight	
tock history	Amoxycilin+Clavulanate 500mg+1	25/02/09	NZD	0.7485	66.00	100	1.00	_	49.40	0.4940		20/03/09	unk brand, india. Air	
tore	Enalapril 5mg tab	25/02/09	NZD	0.7485	3.10	100	1.00	7	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	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 (PenV) 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)	
	Mataalanesmida 10ma tah	21 102 100	M7D	0.7406	7 90	100	1.00		E 07	0.0597		2010/01/00	AE	
	Motoolonramida 10ma kah K	21 /02 /00	M7D	0.7406	7 90	100	1.00	-	E 07	0.0597		2010/100	AE Þ	

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:

	Uotes New Note Delete Note Date Note	
Date Note 03/06/11 Open day - 1 July 2011, 10:00-20:00	Date Note intacts 03/06/11 Open day - 1 July 2011, 10:00-20:00 intacts 03/06/11 Open day - 1 July 2011, 10:00-20:00 intacts intacts intacts intacts intacts	
03/06/11 Open day - 1 July 2011, 10:00-20:00	Intacts Note Note Note Note Note Note Note Note	
lers	alls 03/06/11 Open day - 1 July 2011, 10:00-20:00 up chase orders b log-in ourites ck history	
	chase orders blog-in builtes chase orders chase orders chase orders chase orders chase orders chase or chase of the chase	
	log-in purites k history	
	k history	
	k history	

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	Sustomer/Supplier notes	x
	Entered by: Sussol 01/12/11 Modfied by:	_
Note	Closed for stocktaking - 30/31 December	Î
		-
Display	never all Supplier Invoice is created	ו
	Purchase Order is created Goods Receipt 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

voices ackorders uotes otes	Add Contact Delete	e Contact			Store: Badili	AMS 🗸
ontacts roup urchase orders em lists equisitions tore hoto	First	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.

Add a contact	
Last	Web Login
First	Can login to the web interface
Position	Username Password
Phone	Password
Email	Groups
Address 1	This contact belongs to the following groups:
Address 2	
Country	Add Group Remove Group
Comment	^ I
Category	
Category 2	
Category 3	
fo if related to a customer or supplier	
Name Name	
	Cancel OK
	Our Or

Deleting a contact

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

Group tab

General	London Dispensary	Store: General 👻 👔
Invoices Backorders		
Quotes	Customer group none	
Notes	Item departments which can be supplied to this group.	
Contacts		
Emails	Item departments	
Group Purchase orders		
Web log-in	A STATE AND A STAT	
Favourites	A	
Stock history		
Store		
	Waralam satting a sustamar arous san affast ubich itams can be supp	Red to them
	Warning: setting a customer group can affect which items can be supp	lied to triem
3-7 N.		
		OK & Next Cancel OK
	ups are only relevant to customers, not sup	

If this customer has been added to a group, this tab displays the name of that group. An explanation of groups and how to work with them is here: Show groups...

Customer Item de;	group none none partmen hospital > 50 beds hospital < 50 beds Urban clinic Rural clinic MCH clinic Island health post	to 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

eral	Inte	rnationa	I Dispens	ary Associatio)			Store: Gene	eral 💌	1
korders										
otes						-				
es		Ord no		Date		Target days		Comment		
tacts		100	-	17/12/08		0		NON-DRUGS IDA ORDER 1		
ils		123		28/01/09		0		KIRDRUGTENDER 1		
qu		193		24/06/09		0	110	Tender 09 part 2		
hase orders		325		25/03/10		0	3	Controlled Drugs Order AF		
log-in		291		05/01/10		21	50	- Tender2010		
urites		358		20/07/10	_	0	4			
k history		404	cn	15/12/10		0		IDA Tender Order Air freight		
e		410		15/12/10		0		IDA Tender Order Sea Freight		
		424	sg	22/03/11		0	1	PO generated for tender number: 23 No of PO L	ines 1	
		432	cn	30/06/11		0	2			
										-
		4						m		P
	-									
	_									

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

eneral voices ickorders	checkitem									Store		1
uotes	Item lists attached to this r							ttems		1	Default Order Days	Ō
otes intacts roup irchase Orders	Add master Delete in ist							T	tem ode		Item name	^
en Liet equisitions ore Visibility ioto	List name	Master list	Imprest	Stock Takes	Web	Price	~					
itom data I IS												
	4						, ×					÷
	Style		put to		-		Orderin		od			
	Sort by Group 🔍 🗸) Printer) Excel		Gener	lane la	1.000	nprest tocktak	85			
	_											

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

Note: Before version 5.3 customers could also have local lists assigned to them (they applied to that customer only) but these have been removed from version 5.3 onwards.

Stock history tab

voices ockorders	Health Centre				Store: General	*	i
uotes	Id	Entered date	Stock take date	Status	1	Туре	*
otes	753	11/09/09	11/09/09	cn	im		
ontacts	1650	22/02/10	22/02/10	cn	im		
nails	2106	19/05/10		sg	im		
oup	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

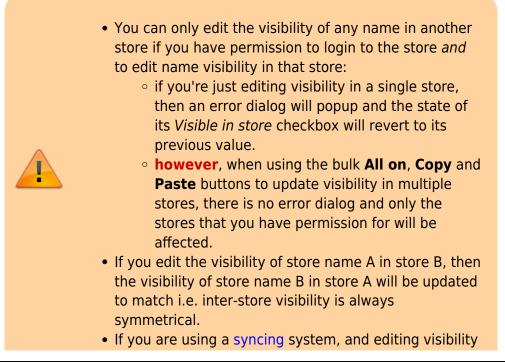
Updated version 4.12

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 O
Quotes		Stores	Visible in store
Notes	General		
Contacts Group	Registration		
Purchase Orders	Test dispensary		
Item List			
Requisitions			
Store Visibility			
Photo			
Custom data			
Log			
Supplier Hub			
Tags			
L			
	All on Copy	Paste	OK & Next Cancel OK

There can be a huge number of stores in this list. If you want to find a particular store or group of stores you can type in the *Search stores* field just above the list. This will restrict the list to only stores with a name that contains what you have typed.

- All on button: When clicked, this will check all the checkboxes in the *Visible in store* column and the button label will change to *All off*. Clicking it then will uncheck all the checkboxes.
- **Copy button**: Will copy the current state of the *Visible in store* checkboxes.
- **Paste button**: Will make the current state of all the *Visible in store* checkboxes the same as it was when the **Copy** button was clicked.



for a store name, that can affect the sync settings for the store on other sites i.e. if you make it invisible to all stores which are **Active** on a site, then the sync status will become **None** on that site; and if you make it visible to at least one store which is **Active** on a site, then the sync status will become **Transfer** on that site - see Store sync-with options.
In a syncing system, facility names (customers, suppliers, etc.) can only be created and edited on the primary server. Patients can be created in any

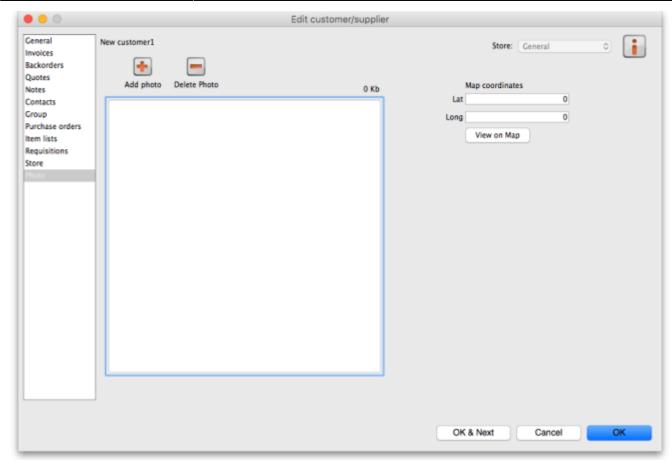
suppliers, etc.) can only be created and edited on the primary server. Patients can be created in any dispensary, including on a sync site. After that, their visibility is controlled on the central server (after they sync there) in the same way as other names, so everything on this tab (including the **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.



Adding or deleting a Photo

To add a photo, either copy the contents of a file to the clipboard and paste them into the image area or click on the **Add photo** button and select the picture file (png, jpg, bmp or gif files supported).

To delete a photo either click on it in the image area and press the delete key on your keyboard or click on the **Delete photo** button.

Map coordinates

- 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

Last update: $2023/04/07$ 13:42 names: adding and editing https://docs.msuppiy.org.nz/names: adding and editing rev=1680874	ast update: 2023/04/07 13:42	names:adding_and_editing https://docs.msupply.org.nz/names:adding_and_editing?rev=168087492
---	------------------------------	---

• • •	Edit customer/	supplier
General	Test customer 01	Store: Ceneral C
Invoices		Store: General O
Backorders		
Quotes	New field 1	
Notes	New field 2 0	
Contacts		
Group	New field 3	
Purchase Orders	New field 4 00/00/00	
Item List	New held 4 00/00/00	See
Requisitions	New field 5	
Store Visibility		
Photo		
Custom data		
Log		
Supplier Hub		
Tags		
L		
		OK & Next
		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

0 0					Edit customer/s	supplier				
General Invoices	Test customer 01						Store:	Store: General 0		
Backorders Quotes		Date	Time	User	Event type	Event type		Event		
Notes	0	4/05/2021	15:44:08	sussol	Create name	Name created				
Contacts										
Group										
Purchase Orders										
tem List										
Requisitions										
store Visibility										
Photo										
Custom data										
Log										
Supplier Hub	11.									
Tags										
							OK & Next	Cancel	OK	

This tab shows a list of all the log entries that belong to this name. These entries will also appear with all the other logs for other events throughout mSupply in the log. See the 25.19. The system log page for details.

If you want to see more details about one of the logs, double-click on it in the list and a detail window, populated with the log's details, will open.

Supplier hub tab

Last update: 2023/04/07 13:42 names:adding_and_editing https://docs.msupply.org.nz/names:adding_and_editing?rev=1680874926

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

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.

0 0		Edit customer/supplier			
General Invoices	Test customer 01		Store: General O		
Backorders					
Quotes	Tags	Use			
Notes	CustomerTag01				
Contacts	CustomerTag02				
roup	SupplierTag01				
urchase Orders	SupplierTag02				
em List					
equisitions					
tore Visibility					
hoto					
ustom data					
9					
upplier Hub					
ags					
			OK & Next Cancel OK		

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: 2023/04/07 13:42