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 | 5 | Contact email web site Phone Fax Status Hole | Price Categor | Customer details | e betically |
|---|---|--|--|---|----------------|
| Category Customer Supplier Manufacturer Benchmark Main/Billing Address | Other Category 1 None Category 2 None Category 3 None Category 4 None | S S Postal a | Category 5 None Category 6 None tate/Region None Flag ddress | Custom 1 Custom 2 Custom 3 Comment Shipping address | |
| Address 1 Address 2 Address 3 Address 4 Address 5 Post code Country | | | | | |

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 or manmufacturers with their record on the Health Supply Hub server and maintained by The mSupply Foundation. If your system does not use the Health Supply Hub, then you can ignore these fields.

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

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

mSupply will then search for a supplier or manufacturer (depending on whether the name is a supplier or manufacturer in mSupply) in the Health Supply Hub with a name having the same first letter. A window like this opens:

| Quick search | | |
|--------------|---------------|--|
| Code | Supplier Name | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |

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

When you see the supplier/manufacturer name that you wish to connect to the supplier in mSupply,

double-click on it to select it; the Health Supply Hub code of the supplier/manufacturer will be put in the **HSH code** field and the supplier/manufacturer's Health Supply Hub name will be shown in the **HSH name** field.

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

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 | . nago | - 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 | | | |
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| | | | | | | | | | | |

Choose the record you wish to keep and click on *OK* ; the data from the deleted record is then merged with the data of the record being kept. If you change your mind, click on the *Cancel* button, and the merger will be cancelled.

Labels

Clicking this button allows you to print address labels for the names in the list. The label editor is displayed.

Report

Click on this icon to open the Quick Report editor window. Use of the Quick Report is discussed elsewhere in the guide. See Custom Reporting Tutorial

Custom data

This allows you to bulk edit the Custom data fields associated with the displayed names. An editor window like this will be displayed:

| | | Update | Apply to |
|----------------------------|------------------------------|--------|---------------------------------------|
| Custom Code | ABC | | Selected items |
| Quantity | | 2 | All items in list |
| Insured | | | |
| Date established | 4/04/20 | | |
| Programme | P1 | 0 | |
| Fields with default (uncha | nged) values will be updated | ≎ Car | 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 | 0 |
| 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 | AUPEUS | DERIC | CIR-D PUBLIC | | | | | | (the second | n Dissis Costa | |
|-----------------|--------|----------|--------------|------------|---------|-----------|--------------------|------------|--------------|---------------------|-------------|
| Invoices | | | | | | | | | 2101 | e: District Sanitai | ire 0 |
| Backorders | 1 | _ | | | | | _ | | | | |
| Quotes | | - | | | Filter | All | ۵ | Ov | erpayments | 0.00 | |
| Notes | | eing | | | | | | | Total of | outstanding | 848,324.60 |
| Contacts | | ,y | | | | | | | | | |
| 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 |
| Item 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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names:adding_and_editing https://docs.msupply.org.nz/names:adding_and_editing?rev=1680875230

| e Cu | isto | mer invoice | | | | | | | | - | |
|-----------|--------------|--------------|--------------------------------------|------------------------------|-----------|-----------|----------|------------|--------------------|------------|--|
| | lam | e | | Confirm date | 17/12/08 | | | | Colour : | Black | |
| The | ir re | f 102824 | C\$04 | Period 01/01/08 - 31/12/08 - | | | | | Invoice : 3,040 | | |
| Com | man | t tuesday | order 👢 | Category | None | | • | Ent | ry date : 16/12/08 | | |
| Conn | nen | it [tuesday) | | | | | | | eive ID: 0 | | |
| | | | | | | | | Goods rec | | | |
| | ÷. | | 6. | B | 1 | 5 | | | Status : cn | | |
| Ne | ew I | ine Del | ete line(s) | Backo | rders I | History | | Ente | ered by: Pharmac | y assistan | |
| Gen | eral | Summary | by Item Summary by Batch Transport d | etails | | | | | 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 | |
| Ľ | 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 | | 0.00 | | 0.00 | |
| | 7 | LTE | Chlorhexidine 1% solution (mL) | 1 | 5000 | 80356 | 30/03/12 | 0.00 | | 0.00 | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | - | |
| | 6 | | Other charges Item: | | | | | A | mount: | 0.00 | |
| 1 | 4 | | U | | | | | Su | ubtotal: | 22.36 | |
| | | | | | | | | 0 |) % tax: | 0.00 | |
| | | | | | | | | | Total: | 22.36 | |
| Ho Fir | old naliz | ze Expo | ort batch: 0 | | | OK & Next | | Delete | ОК |] 🗆 🧧 | |

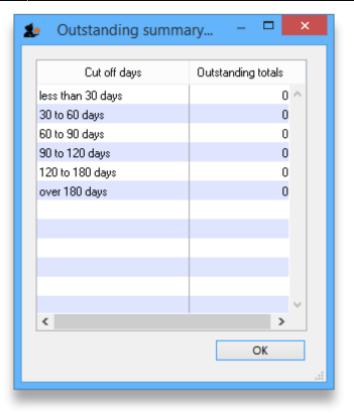
Buttons on the Invoices tab

Print Range

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

Aging

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



Dates

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

Backorders tab

| General nvoices Backorders | | | | | | Store: General * | i |
|----------------------------------|-----------|--|------------|----------|--------|------------------|---------|
| outes | • | * | - | | | All | |
| ontacts | New backo | rder 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 | | 1010103 |
| 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 | | |
| | Sal4 | Salbutamol 4mg tab | 22/02/11 | 400 | 50400 | | 1000 |
| | Amo500 | Amoxycillin 500mg cap | 22/02/11 | 3000 | 723000 | | |
| | Flu500 | Flucloxacillin/Cloxacillin 500mg cap | 22/02/11 | 2000 | 4700 | | 6.0.00 |
| | 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 | | |
| | Savi | 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 | | |
| | | | | | | OK & Next Cancel | OK |

• 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 | |
| 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.

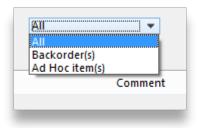
Viewing backorders

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 in case of garants of the | | | | | | | | | Stor | e: 🤇 | Seneral | - I) | |
|---------------------|--------------------------------------|------------|-----|---------|-------|-----|---------|---|--------|----------|------|-------------|---------------------------|---|
| Backorders | | | | | | | | | | | | | | |
| Ouotes | 💿 👘 | | | | | | | | | | | | | |
| 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 | ٠ |
| Froup | 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 | 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 | |
| avourites | Suxamethonium 100mg/2ml amp | 25/02/09 | NZD | 0.7485 | 230.3 | 50 | 1.00 | | 172.38 | 3.4477 | | 20/03/09 | NZ. Air freight | |
| tock history | Amoxycilin+Clavulanate 500mg+1 | 25/02/09 | NZD | 0.7485 | 66.00 | 100 | 1.00 | Ξ | 49.40 | 0.4940 | | 20/03/09 | unk brand, india. Air | |
| tore | Enalapril 5mg tab | 25/02/09 | NZD | 0.7485 | 3.10 | 100 | 1.00 | 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 | 7 | 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 | | | 25.65 | 500 | 1.00 | | 19.22 | 0.0384 | | 30/04/09 | AF Fiji (Apotex) | |
| | Motoolonenvide 10ma tab | 21 102 100 | NZD | 0.7406 | 7 90 | 100 | 1.00 | | E 07 | 0.0597 | | 201704100 | AE | |

You can view the quotations you have entered in mSupply for this supplier.

Notes tab

To add, edit or delete a note, click on the *Notes* tab, and this window displays:

| eral | Multichem Exports | Ltd | | Store: General | * | i |
|-------------------|-------------------|-------------------------------------|------|----------------|------|------|
| korders | • | * | | | | 1010 |
| otes | New Note | Delete Note | | | | |
| es tacts | Date | | Note | | | |
| ils | 03/06/11 | Open day - 1 July 2011, 10:00-20:00 | | | | |
| p | | | | | | |
| ase orders | | | | | | |
| log-in | | | | | | |
| inites history | | | | | | |
| initiony | | | | | | |
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| | | | | OK & Next Ca | ncel | OK |

Click on *New note* to create a note, or select an existing note and double click on it to view, edit or delete it.

| Add C | Customer/Supplier notes | x |
|---------|--|---|
| | 01/12/11 Modfied by: Sussol | |
| Note | Closed for stocktaking - 30/31 December | • |
| | | |
| | | |
| | | , |
| Display | when Purchase Order is created Pick Color Beep 0 times | |
| Uspioj | never all Supplier Invoice is created | |
| | 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

| eneral voices ackorders uotes otes | Add Contact Delete | e Contact | | | Store: Badili, | AMS V |
|--|--------------------|-----------|----------|-------|----------------|----------|
| 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 | |
| Email | Groups |
| Address 1 | This contact belongs to the following groups: |
| Address 2 | 📩 🖃 |
| Country | Add Group Remove Group |
| Comment | |
| Category | |
| Category 2 | |
| Category 3 | |
| nfo if related to a customer or supplier | |
| Name Name | |
| | Cancel OK |
| | |

Deleting a contact

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

Group tab

| General Invoices | London Dispensary | Store: General 🔹 👔 |
|---------------------|--|---------------------|
| Backorders | | |
| Quotes | Customer group none 💌 | |
| Notes | container group (mont | |
| Contacts | Item departments which can be supplied to this group. | |
| Emails | Item departments | |
| Group | | |
| Purchase orders | | |
| Web log-in | · · · · · · · · · · · · · · · · · · · | |
| Favourites | | |
| Stock history | | |
| Store | | |
| | the second s | |
| | | |
| | | |
| | Warning: setting a customer group can affect which items can be supp | lied to them |
| | | |
| | [19] 전 : 19:22 - 24 - 74 - 74 - 74 - 75 - 75 - 75 - 75 - 7 | |
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| | | |
| | | OK & Next Cancel OK |
| an Maria a | | |
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| - | | |
| | | |
| 🖉 Grou | ups are only relevant to customers, not sup | opliers. |
| | · · · · · · · · · · · · · · · · · · · | |

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

| neral oices | Internat | tional Di | ispensa | ry Associatio | | | Store: General | - 🚺 |
|--|----------|--|---------|--|--|---------------------------------------|---|-----|
| ckorders lotes tes ntacts ails oup rchase orders eb log-in rourites ock history | | no Str 100 sg 123 cn 193 fn 325 cn 291 cn 358 cn 404 cn | | Date 17/12/08 28/01/09 24/06/09 25/03/10 05/01/10 20/07/10 15/12/10 | Target days 0 0 0 21 0 0 0 0 0 0 | 2 192 110 3 50 4 23 | Comment NON-DRUGS IDA ORDER 1 KIRDRUGTENDER 1 Tender 09 part 2 Controlled Drugs Order AF - Tender2010 Drug Order July 2010 AF IDA Tender Order Air freight | |
| ore | | 410 cn 424 sg 432 cn | | 15/12/10 22/03/11 30/06/11 | 0 | | IDA Tender Order Sea Freight PO generated for tender number: 23 No of PO Lines 1 | |
| | • | | | | | | m OK & Next Cancel | OK |

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

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| 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 | in the | 1.000 | nprest tocktak | 85 | | | |
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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

| Le Edit customer/sup | | | | | | | |
|----------------------|---------------|--------------|-----------------|------|----------------|--------|----|
| General | Health Centre | | | | Store: General | - | i |
| Invoices | | | | | | | |
| Backorders | | | | | | | _ |
| Quotes | Id | Entered date | Stock take date | Stat | | Туре | * |
| Notes | 753 | 11/09/09 | 11/09/09 | | im | | |
| Contacts | 1650 | 22/02/10 | 22/02/10 | cn | im | | |
| Emails | 2106 | 19/05/10 | | sg | im | | |
| Group | 2479 | 08/08/10 | 08/08/10 | | im | | |
| Purchase orders | 3008 | 25/11/10 | 25/11/10 | cn | im | | |
| Web log-in | | | | | | | |
| Favourites | | | | | | | |
| Stock history | | | | | | | |
| Store | | | | | | | |
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| | | | | | OK & Next | Cancel | OK |
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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

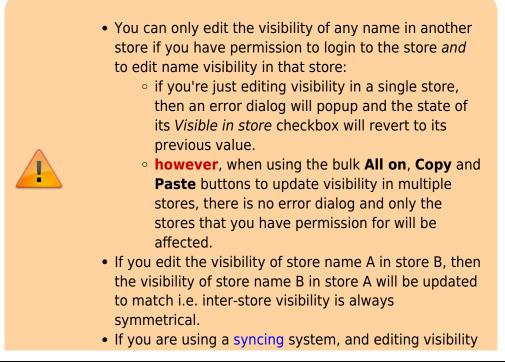
The tab shows which stores the customer/supplier is visible in. Only when the visibility checkbox is checked will the customer/supplier be visible to 'this' store, which is needed if the store will receive and/or issue goods from 'this' store.

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| • • • | | Edit customer/supplier | | |
|-----------------------------------|--------------------------------|------------------------|---------------------|---|
| General Invoices Backorders | Test customer Search stores | | Store: General 0 | i |
| Quotes | | Stores | Visible in store | 1 |
| Notes | General | | | |
| Contacts | Registration | | | |
| Group | Test dispensary | | i i i | |
| Purchase Orders | | | | |
| Item List | | | | |
| Requisitions Store Visibility | | | | |
| Photo | | | | |
| Custom data | | | | |
| Log | | | | |
| Supplier Hub | | | | |
| Tags | | | | |
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| | All on Copy | Paste | OK & Next Cancel | ж |
| | | | | |

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

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 custome | r/supplier | | | | |
|------------------|------------------|--------------|--------------|------------|------------------|----------------|------------------|----|
| eneral woices | Test customer 01 | | | | | Store: Cent | ral Contraceptiv | • |
| ackorders | - | | | | | | | _ |
| uotes | Add photo | Delete Photo | | | | Map coordinate | - | |
| otes | Add prioto | Delete Photo | | 0 Kb | | | · | |
| ontacts | | | | | Map coordinates: | | | |
| roup | | | | | Lat | | 0 | |
| archase Orders | | | | | Long | | 0 | |
| em List | | | | | - | View on Map | | |
| quisitions | | | | | | their off map | | |
| ore Visibility | | | | | | | | |
| oto | | | | | | | | |
| ustom data | | | | | | | | |
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| Supply Link | | | | | | | | |
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Adding or deleting a Photo

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

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

Map coordinates

2025/06/15 05:42

- 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

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• You can then view the customers location by clicking the **View on Map** button.

Custom data tab

| Last update: 2023/04/07 13:47 names:adding and editing https://docs.msupply.org.nz/names:adding and editing/rev=16808/5 | ast update: 2023/04/07 13:47 | names:adding_and_editing https://docs.msupply.org.nz/names:adding_and_editing | g?rev=1680875230 |
|---|------------------------------|---|------------------|
|---|------------------------------|---|------------------|

| • • • | Edit customer/ | supplier |
|------------------|----------------------|---------------------|
| General | Test customer 01 | Store: Ceneral 0 |
| Invoices | | store: Ceneral V |
| Backorders | New field 1 | |
| Quotes | New held 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 | |
| Requisitions | New field 5 | |
| Store Visibility | | |
| Photo | | |
| Custom data | | |
| Log | | |
| Supplier Hub | | |
| Tags | | |
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| | | OK & Next Cancel OK |
| | | |

This tab shows all the custom fields that have been set up in the preferences. See the 16.11. Custom fields page for details.

You can edit or enter values in the fields as required. When you click on the **OK** or **OK & Next** buttons the values will be saved.

Log tab

| | | | | Edit customer/su | pplier | | | |
|-------------------------------|------------------|-------------|------|------------------|--------------|-----------|---------|----|
| General invoices | Test customer 01 | | | | | Store: | General | • |
| Backorders | Date | Time | User | Event type | | Event | | |
| Quotes | 04/05/2021 | 15:44:08 su | | Create name | Name created | | | |
| otes | | | | | | | | |
| ontacts | | | | | | | | |
| roup Irchase Orders | | | | | | | | |
| em List | | | | | | | | |
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| ore visibility | | | | | | | | |
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| | | | | | | OK & Next | Cancel | ОК |

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 13:47 names:adding_and_editing https://docs.msupply.org.nz/names:adding_and_editing?rev=1680875230

| • • • | | 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 | | | | | |
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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 0 |
| Backorders | | | |
| Quotes | Tags | Use | |
| Notes | CustomerTag01 | | |
| Contacts | CustomerTag02 | | |
| roup | SupplierTag01 | | |
| urchase Orders | SupplierTag02 | | |
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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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