# 25.01. Miscellaneous topics

## Inactive logout

You can set mSupply to log an inactive client out after a customisable time in general preferences.

## End of month tasks

We are presuming that you will ûnalise and export your invoice data o diû erent frequency, you should still follow the same procedure.

Tasks to perform:

- Check your invoices are correct. Once you have ûnalised an invoic
- Finalize and export supplier invoices. See the ûle menu chapter.
- Finalize and export customer invoices. See the ûle menu chapter.
- Record the stock on hand value (this is only necessary if your acc information). See the special menu chapter.

Hints:

- Each month, take your û nalised invoices and û le them. We suggest
  their invoice number (a separate û le for supplier and customer inv
- Keep a û le with the summary printout from each month produced w

## End of year tasks

It is usual to run according to a û nancial year. mSupply does not requ
perform special operations for the end of the û nancial year. If you wa
mSupply as usual.

However, there are certain procedures that will improve operation, an
operation easier.

1. Perform a stocktake.
   1. Finalize all outstanding invoices. Use the Finalize customer invoices & Finalize Supplier invoices commands to do this. (Note that any customer in status of sg ( suggested ) must be conû rmed before they can
   2. Create stocktake sheets to record diû erences easily between a according to mSupply. See the stocktake sheets section of the
   3. Use inventory adjustment transactions to correct errors. See t add stock and the Inventory adjustment- reduce stock sections chapter.
   4. Finalize inventory adjustments. Use the Finalize inventory adju this.
2. Make a backup copy of mSupply as it stands at year-end. It is a go a secure place for long term storage.
3. Print a ledger for each item. Choose print item ledger from the your backup copy of mSupply to print this ledger at a later date.
4. Choose set start of year stock from the special menu. This simp transaction number, and records the total opening stock quantity f calculation for the coming year.
5. You are now ready to begin entering transactions for the next yea

## Maintenance and repair

If you are using your data û le regularly, it is a good idea occasionally
developed. Problems can develop due, for example, to faulty hardware
control.

For technically competent users or professional IT staû

In the case of a serious hardware failure, the û rst option should alway
good backup of your data.

If for some reason you must repair a damaged data û le, please contac
advice.

To check your data, download a product called // 4D Tools .// (4D Too
the CD) from ftp://ftp.4d.com

// 4D Tools// can simply check your data file for errors, or repair your
Solutions if you believe your data file has a problem, before repairing

Always use // 4D Tools// on a backup copy of your data first.

If 4D Tools is unable to repair your data, Sustainable Solutions is able to
examine your data, and even export your data and re-import into a new
do this for a customer yet, but the option is available as a near-last r

## How do I move a window whose title bar has be

On Windows:

- Method 1: Press Ctrl and both mouse buttons, and drag the window
- Method 2: Press Alt-Ctrl-right mouse button, while dragging the wi

On Mac OS

- Press Control-Command-mouse button, and drag the window to the

## Security of your data

If you maintain the mSupply password system carefully, your data is q

Note, however, that if a person has access to the original copy of mSu
open the data file, as the user 1 password is clearly shown in the pa
overwritten the first time you click OK . It is your responsibility to ke
software and data in a safe place.

As of version 1.4, passwords stored in the data file are encrypted with
encryption, so there is little danger of someone finding your password

## Supervisor mode - all stores

mSupply was initially designed to maintain data relating to a single st
many users, this is how mSupply continues to be used.

Since version 2 users have been able ot operate with multiple stores.
particular store when starting mSupply, and only see stock and transa
However, users can be given the password to log in to Supervisor - All stores mode, users
may now access data relating to more than one store - either selective

Any user in 'Supervisor - All stores' mode will only see the stores the

into in the list of stores to select from.

## Reporting

In this mode, nearly all of the report filter windows will display an add
select which stores' data will be included in the report. Here is an exa
report:

All the currently active stores in your database appears in the list. The store
stores to be included in the report should be selected in the normal w
to select more than one store (Windows) or (Mac) while clicking on the d
store(s). also works for selecting all stores.

Note also that when you search for items, the filter window has the sa

The item search filters will be applied to items visible in the stores se
stores in the datafile you can click the Magnifier button on some windo
to select the required store(s) in a separate window.

Further filtering of stores

Some mSupply datafiles can contain hundreds of stores. It cna become
the exact stores to include in a particular report. To help with this, or
additional magnifying glass button near the top of the store list. See t
stocktake report window:

When you click on the button, this window opens and it allows you to s
based on store tag and custom data values:

- Match tags: enter the tags that a store must have to be included in th

enter multiple tags separated by commas; if there are multiple tag
one of them will be included in the search (the store does not hav
included). Tags are ignored if this field is left empty. See the 25.08 Virtual stores
details on setting store tags.

- Custom data: enter the name of the custom data values that a store m
in the search in the form name=value where field name is the custom field name a
value is the value the field must have for the store to be included. Y
name=value pairs separated by commas; any store that has any of the
value will be included in the search (a store does not have to have
pairs to be included. If the Custom data field is left blank then cus
See the 25.08 Virtual stores page for details on setting store custom data fi
- and/or drop down list:
- Find button:
- Show all:
- X/Y Stores shown text:

## Ordering stock

In Supervisor - Ahosdeyou can also create Purchase Orders that will be
stores, and can specify delivery destinations for different lines within

// Previous: 26. Other Topics | Next: 26.02. Reminders //

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Last update: 2021/04/26 14:14