7.07. Managing donors

What / who is a donor?

In mSupply, we have the idea of a '*name*'. A name can be a customer, a supplier, a patient, ... or a donor.

A donor is the organisation that has either paid for, or somehow managed the supply of certain items.



mSupply allows you to specify the donor for each incoming stock line independently of the supplier.

For example, GlobalFund might agree to supply certain malaria medicines, and then contract a supplier to deliver them to you. mSupply allows you to record this accurately, and to track and report on all the stock and transactions relating to those medicines donated by GlobalFund.

Using the donor module

To use the donor module, you must first turn it on:

- Click drop down menu File>Preferences...
- Click the **Invoice 1** tab in the left-hand list
- Check the box Allow tracking of received stock by donor

0 0	Preferences	
General Invoices 1 Invoices 2 Printing Misc Log Patient Medication E-mail Backup	All Invoices Allow editing tax rate & amount on invoices Allow entry of dates on invoices Export invoices to disk when finalizing After deleting lines, redo the numbering Activate budget module	 Activate Ad hoc items Round cost, sell price, cash payment and cash receipt Z decimal places
Backup 2 Reminders Web server Moneyworks Drug Interactions Customization Dispensary mode Item Purchase order defaults Purchase order 2 Price This Computer OK and print Logo Quotes	Supplier Invoices ✓ Allow editing margins on supplier invoice lines → Hide batch number and expiry date entry ✓ Confirm supplier invoices without asking ✓ Show comparative purchases for supplier invoices ✓ Item margin overrides supplier margin on supplier invoices ✓ Activate supplier payment module Warn if expiry less than 0 days Disallow remove hold status if zero sell price ✓ ✓ Sell price changes affect un-finalized customer invoices	 Show inner and outer pack fields Hold invoice by default Allow tracking of received stock by donor
HIS Tender Svochronize		Cancel

Once you have done this you can add donors and track stock by donor.

Adding or editing donors

To add or edit a donor you should first bring up the list of donors. Do this from the Navigator:

- Go to the Suppliers tab > Show Suppliers and check the box beside Donors so that the list shows donors rather than suppliers. Click Find. This will bring up a new window showing any donors you have added
- You can edit a donor by double-clicking on it.
- You can add donors using the **New** tool bar at the top of the window. This will bring up a window like this:

			New donor					
General	Arch Foundation Name Code arch Charge to arch March Fou Master ID Master r	ndation 0 🚱 name	Contact email web site Phone Fax Status Hold	Price Category	Store: General 2			
	Category Customer Supplier Manufacturer Benchmark Donor	Other none Category 2 none Category 3 none	Categor Categor Categor F	y 4 none	Custom 1 Custom 2 Custom 3 Comment			
	Main/Billing Address Address 1 Address 2 Address 3 Address 4 Address 5 Post code Country		Postal address		Shipping address			
Delete name)			OK & 1	Next Cancel OK			

• Now add your donor details and click **OK**.

Track a donor in mSupply

Donors and the purchase order

- Create a Purchase Order in one of the usual ways refer Ordering Items From Suppliers.
- With donor tracking turned on, the Donor field will appear in the window see below. The value you enter here will be tracked from this point on through to receipt, stock transfers and dispatch.

غ				Ne	w Pur	chase o	order					-0		x
	Order num	: 3509	Name [В	ack	
	Confirm dat	e 00/00/00]	Donor				Refe	rence			Status sg		
Requ	uested deliven	/: 02/03/2015]									Store: Mu	nda SLM	s
Ger	neral Details	Ad Hoc items	Goods Received	Supplier Invo	ices Lo	og Locat	ion							
	+	-	0	i	=		\checkmark							
Ne	wline	Delete	Update EDD	Info	Print	Co	nfirm		Categ	ory none				
she	ow all lines	•						Cun	rency SBD	▼ For	ex rate	1		
Lin	e Item code		ltem	Orig.Qty	Pack	Adj. Qity	Tot. recei	Stock on	On Order	Cust.b/odrs	Price Ext	Expected	Store:	
														^
<		1											>	~
5	Supplier Percent	discount age	0 Discount amou	int [0	.00			Es	Estin timated cost	nated subtot after discou	tal nt	0.00	0
	Locked	1	Auto calc us	age		✓ Print	long descri	iption	🗌 Print r	ny signature				
	Finalize orde	r							OK & Next		Delete	0	ĸ	

In the **Donor** field type the first few characters of the donor name or code (or enter the wildcard character '@' in field) and press the **Tab** key on the keyboard. This opens the window below, showing the donor that match what you typed:

🖯 🔿 🔿 Cho	oose name
•	
New	
Name	Code
Arch Foundation	arch
Double-click a name to choo	ose it
	Cancel
	1

- If your donor does not exist, you can add it at this point by clicking on the **New** button see Adding or Editing Donors above.
- Once you have selected your donor, click on the **OK** button and the donor's name will appear in the **Donor** field:

0	•				N	ew Purc	hase orde	r					
	Order num :	87	Name	Central Medic	al Store			c	MS				lack
	Confirm date	22/05/2013	Default donor:	Arch Foundat	ion			Reference				Status cn	
leque	sted delivery	22/05/2013										Store: Ge	neral
			General Detai	Is Ad Hoc	items	Goods	Received	Supplier Invo	oices Log	Location]		
÷		-	0		=	[\checkmark						
New	line Del	ete lines	Update EDD	Info	Print	C	onfirm		Catego	ory none		•	
show	all lines	\$						Curr	rency VUV	‡ Fo	rex rate	1	
ine	Item code		ltem	Orig.Qty	Pack	Adj. Qty	Tot. rece	Stock on	On Order	Cust.b/o	Price Ext	Requeste	Store:
1	40	AMOXYCILLI	N 250mg TAB/CAP	1000000	10	1000000	0	286600	0	0	178,000.000		General
_													
	Supplier	discount											
S	Percent	age	0 Discount amou	unt	0.0	000			E	Estimated co	timated subtot st after discou	al 178 nt 178	,000.000(,000.000(
			Auto calc us	sage		Prin	t long descri	ption	Print n	ny signature			
O F	înalize order	- Au	thorise						OK & Next		Delete		0K

 Add your Item line(s), check your order is correct and click the **Confirm** button to make the order available for Goods Receipt in the normal way - see Ordering Items From Suppliers for more details.

Donors and the goods receipt function

Receive goods in the usual way - see Receiving goods (Goods Receipt function). The only difference is that the Donor's name is now present in the Donor field:

Last update: 2019/10/16 17:53

0	0		New goods	receipt		
	Supplier	Central Medical Store			Store: G	eneral ‡
Re	eceived date	22/05/13 Tender reference :			Goods receiv	ed ID: 34
Suppli	er reference				Create	ed by : sussol
					Modifie	ed by :
					Entry	date : 22/05/13
De	fault donor	Arch Foundation			Purchase (order: 87
					Supplier in	tatus: nw
	-	·	*	-	ر ب	tatus. Inv
Add fr	rom purchase	e order Add an un-ordered item	Delete line	Check space	Print goods receipt	
Line	Location	ltem name	Batch	Exp date	Pack Size	Quan
1	TAB	AMOXYCILLIN 250mg TAB/CAP	ABC	1234 30/09/	2018	10 100000

Donors and the supplier invoice

✓ Finalize

 Clicking Finalise on the Goods Receipt generates the Supplier Invoice in the usual way (see Receiving Goods - a Supplier Invoice). Note that you can see the donor identified in the Purchase Order in the Default donor field:

OK & Next

Delete

OK

5/08/11 12:24			7/1	.0			7.06. Managing do			
0 0			S	upplier i	nvoice					
Name Cent Their ref Comment good	L Control Sur	Ca Jefault	Entry Confirm Itegory N Donor: Ar	v date : 22/05 a date : 00/00 one ch Foundation	/2013 //00 : : : : :	Colour : Col				
Lo	Item Name	Qty	Pack	Batch	Expiry	Cost Price	Sell Price	Price extension		
1 TAB AMOXY	CILLIN 250mg TAB/CAP	100000	10	ABC1234	30/09/2018	1.78000	1.78000	178,00	0.00000	
									- 1	
		-								
<u>s</u>	Other charges Item(s): Amount: 0.0	0000						Subtotal: 178 0 % tax: Total: 178	8,000.00000 0.00000 8,000.00000	
 Hold Finalize 	Export batch: 0 Margin: 0.00					OK & Next	Dele	te OK	09	

Default donor for each stock line

- Each stock line on a Supplier Invoice will inherit the **Default donor** from the Supplier Invoice.
- The **Default donor** can be edited.

00		and in	S	upplier	invoice	and the second second	and the second second	
Name Abbo Their ref Comment Mew line Do	ot Laboratories (singapore PTE.LTD SNG102	••••••••••••••••••••••••••••••••••••••	Ca Default	Entr Confirm ategory N Donor: U	y date : 11/0 n date : 00/00 None NFPA	1/2013 0/00 ÷	Pu	Colour : Black Invoice number : 0 Status : nw Goods receive ID : 0 Inchase Order ID : 0 Entered by : Sussol Store : General
	Genera	al Su	mmary	by Item	Summary by	Batch Price		
S 🛛 🗸	Other charges Item(s): Amount: 0.000	000					Subtotal: 0 % tax: Total:	0.00000 0.00 0.00000
 Hold Finalize 	Export batch: 0 Margin: 0.00					OK & Next	Dele	ete OK 🗆 🗳

Changing the donor for a particular supplier invoice line

• There may be circumstances when delivered stock may be from a mix of donated and nondonated, or from different donors. You can change the donor for any stock line on a supplier invoice when editing the details of the stock line (double-click on the stock line).

lt a se	Construites dies Des		-				
item	Sensivity disc Dox	cycyclin	e			<u> </u>	
Quantity	1				77/3310		New iten
Pack size	1 C	art/5					_
Total quantity:	1				Location		
Batch	1091060			Volum	ne per pack		0 m3 S
Expiry	30/9/14		Adjusted local cost (USD)	% Margin		Sell price	
nvoice line unit cost (USD)	142.38000		142.38000	0.00	1	42.38000	
			D	onor UNFPA			
				Cancel	ОК		OK & Next

If you change the **Default donor**, you will be presented with the following options:

• •	Donor update confirm
You have ent affect existin	ered or changed a donor. How do you want to g invoice line(s) ?
Choose one o	of the options below
💿 Do r	othing
Upd	ate existing donor lines with this donor
Assi	gn this donor to the lines with no donor
Assi	gn this donor to all lines
	Apply

- "Do nothing": The change will have no effect on existing invoice line(s).
- "Update existing donor lines with this donor": existing donor lines will be updated to match the newly selected donor.
- "Assign this donor to the lines with no donor": lines with no donor selected will be updated with the newly selected donor.
- "Assign this donor to all lines": all lines will be updated with the newly selected donor.

Donors and the customer invoice

Customer invoices, including stock transfers for donated goods are created in the usual way - refer Issuing Goods to a Customer (Customer Invoices).

• They key thing to note is that when selecting from the stock lines to add to the Customer Invoice, the donated stock lines can be distinguished from the other stock lines by the donor name in the **Donor** column - see below:

							edit line						
ltem	AMOXY	CILLIN 25)mg TAB/CA	P					40)			
Line		5				Item	m category : 6.2.1 Beta Lactam Antibiotic:						
Quan		50 of 10	0000										
Pack		10 ea	ŧ	Bulk/Out	ter pa	ack size	0						
							Re-lookup	Sell Price]				
L	Issue	Available	Tot in st	Pack	Н	Batch	Expdate	Supplier	Donor	Location	Cost Price	Sell price	Sta
1	0	0	2700	1		ANTUV00	30/06/2014	CMS		TAB	1.86000	1.86000	
2	0	0	2400	1		ANTUV00	30/06/2014	CMS		TAB	1.86000	1.86000	
3	0	160000	165000	1		ANTUV00	30/06/2014	CMS		TAB	1.86000	1.86000	
4	0	116500	116500	1		6771204	30/04/201	CMS		TAB	1.86000	1.86000	
5	50	100000	100000	10		ABC1234	30/09/201	CMS	arch	TAB	1.78000	1.78000	
Abbreviati Abbreviat Expan directi	Total qu ions tion ded ons	antity avail	able 127	5500				Car	ncel	ОК		K & Next	•
	MSupply will still suggest a stock line according to its selection criteria (primarily, FEFO). You will need to manually select the donated stock line if it is not the first expiring!												

Reporting

Obviously, one of the points of entering all this donor information is to be able to report on it. When the donor tracking preference has been turned on, many of the stock based report filters in mSupply will have an additional donor filter added to them. Simply enter the donor filter settings you need, as appropriate, to filter the reports accordingly.

Previous: 8.06 Custom stock fields || Next: 9. Issuing Goods

