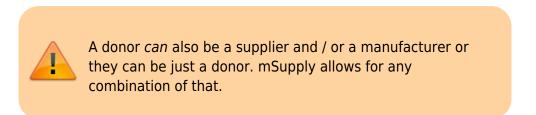
7.06. Managing donors

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

00	Preferences	
General Invoices 1 Invoices 2 Printing Misc Log Patient Medication E-mail Backup Backup 2	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 2 decimal places
Reminders Web server Moneyworks Drug Interactions Customization Dispensary mode Item Purchase order de Purchase order 2 Price This Computer OK and print Logo Quotes	 upplier 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
Reports HIS Tender Synchronize		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.

Name filter	Fuzzy
Name filter	✓ contains ✓
and \checkmark	District v is
and	✓ Customer group is Don't Care ✓
Search	
O All names	s O Manufacturers
Selection	Donors
	rs Exclude patients
O Customer	
-	

• Click Find. This will bring up a new window showing any donors that have been added to

mSupply in your system

- 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		
Ceneral	Arch Foundation Name Code arch Charge to arch Name Arch Foundation Master ID 0 S Master name		Contact email web site Phone Fax Status Hold	Price Category	Store: General :
		none egory 2 none egory 3 none	Category 4 Category 5 Category 6 Flag	5 none + 6 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 & N	ext 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.

2					Ne	w Pu	chase o	order							×
		Order num		Name	_									lack	
			e 00/00/00	_	Donor				Refe	rence			Status sg		
_			02/03/2015										Store: Mu	nda SLN	IS
G	enera	Details	Ad Hoc items	Goods Received	Supplier Invo	ices Lo	og Locat	on							_
	÷]	-	1		=		\checkmark							
N	ew li	ine l	Delete	Update EDD	Info	Print	Co	nfirm		Categ	ory hone				
si	iow i	all lines	•						Curr	rency SBD	▼ For	ex rate	1		
L	ne	Item code		ltem	Orig.Qty	Pack	Adj, Qity	Tot. recei	Stock on	On Order	Cust.b/odrs	Price Ext	Expected	Store:	
															^
															v
4														>	
6	5	Supplier Percent	discount age	0 Discount amou	unt 🗌	0	.00			Es	Estin timated cost	nated subtot after discou		0.0 0.0	
		Locked	1	Auto calc u	sage		 Print 	long descri	ption	Print r	ny signature				
[Fir	nalize orde	r							OK & Next		Delete	0	К]

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:

⊖ O O CI	hoose name
-	
New	
Name	Code
Arch Foundation	arch
Double-click a name to ch	oose it
	Cancel Use

- 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			B	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	
line	Item code		ltem					Stock on	On Order			Requeste	
1	40	AMOXYCILLI	N 250mg TAB/CAP	1000000	10	1000000	0	286600	0	0	178,000.000		General
_													
	Supplier	discount								-			
S	Percent		0 Discount amou	unt	0.0	000			E		timated subtot st after discou		,000.000(,000.000(
	Locked		Auto calc us	sage		Prin	t long descri	ption	Print n	ny signature			
O F	inalize order	- Au	thorise						OK & Next		Delete	-	ж

 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: 2023/06/22 00:00

0	0	1	New goods rec	eipt		
	Supplier	Central Medical Store			Store: Gene	eral \$
Re	ceived date	22/05/13 Tender reference :			Goods received	ID: 34
Suppli	er reference					by : sussol
					Modified	
De	fault donor	Arch Foundation	_		Entry da Purchase ord	te: 22/05/13
50	aute donor	Piter Foundation			Supplier invoi	
					State	us: nw
	<u>+</u>	🔳	No lata lina Ci	🔁		
Add fr	om purchase	e order Add an un-ordered item	Delete line Ch	neck space Pri	nt goods receipt	
Line		Item name	Batch		Pack Size	Quan
1	TAB	AMOXYCILLIN 250mg TAB/CAP	ABC1234	30/09/2018	10	100000
🗹 Fin	alize			OK & Next	Delete	ОК

Donors and the supplier invoice

• 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:

025/08/11 07:11	7/11		7.	06. Managing dor
00	Supplier in	nvoice		
Name Central Medical Store Their ref CMS Comment goods received ID : 34		date : 22/05/2013 date : 00/00/00	Colour : Invoice number : A Status : r Goods receive ID : 3 Purchase Order ID : 8	2,229 nw 34 87
New line Delete line	Default Donor: Are	ch Foundation Summary by Batch Pric	Entered by : s Store : 0	
Lo Item Name 1 TA8 AMOXYCILLIN 250mg TA8/CAP 2 4 3 4 4 4 4 4 5 4 6 4 7 4	Qty Pack Batch 100000 10 ABC1234	Expiry Cost Price 30/09/2018 1.78000		nsion 78,000.00000
Other charges Item(s): Amount: 0	0.00000		Subtotal: 0 % tax: Total:	178,000.00000 0.00000 178,000.00000
Hold Export batch: 0 Finalize Margin: 0.00		OK & Next		178,000.0000

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	0		and states	S	upplier	invoice	-		
(Name Their re Commen 	t Delete line	_ C	Default	Confir ategory Donor: L		\$		Colour : Black Invoice number : 0 Status : nw Goods receive ID : 0 urchase Order ID : 0 Entered by : Sussol Store : General
	Lo	Genera	Qty	Pack	Batch	Summary by Expiry	Batch Price	Sell Price	Price extension
5		Other charges Item(s): Amount: 0.000	00					Subtotal: 0 % tax: Total:	0.00000 0.00 0.00000
-	old inalize	Export batch: 0 Margin: 0.00					OK & Next	Del	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).

Item	Sensivity disc Dox	vevelin	e				-
ice in	Sensivity disc box	.yeyenn	•				
Quantity	1			'	77/3310		New iten
Pack size	1 C	art/5					_
Total quantity:	1				Location		<u>S</u>
Batch	1091060			Volum	e per pack		0 m3 S
Expiry	30/9/14		Adjusted local cost (USD)	% Margin	S	ell price	
nvoice line unit cost (USD)	142.38000		142.38000	0.00	142	2.38000	
			D	onor UNFPA			
				Cancel	ОК		& Next

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

• •	Donor update confirm
	red or changed a donor. How do you want to invoice line(s) ?
Choose one of	the options below
💿 Do no	thing
Updat	e existing donor lines with this donor
Assign	n this donor to the lines with no donor
Assign	n 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						-
lterr	n AMOXY	CILLIN 25)mg TAB/CA	Р					40)			
Line	e	5				ltem (category : 6.2	.1 Beta Lact	am Antibio	tic:			
Quar	n	50 of 10	0000										
Pack	k	10 ea		Bulk/Out	ter p	ack size	0						
						C	Re-lookup	Call Drice	1				
) 		Cont Balan		
L			Tot in st	Pack	н		Expdate	Supplier	Donor	Location	Cost Price		St
1	0	0	2700 2400	1			30/06/2014 30/06/2014	CMS CMS		TAB TAB		1.86000	
3	0	160000	165000	1			30/06/2014	CMS		TAB	1.86000		
4	0	116500	116500	1			30/04/201	CMS		TAB		1.86000	
5	50	100000	100000	10			30/09/2011	CMS	arch	TAB		1.78000	
brevia Expar direct	nded		able 127	6500]			•
brevia Expar	ation												÷
brevia Expar	ation							Car	ncel	ОК		K & Next	

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: 7.05. Custom stock fields | | Next: 8. Issuing Goods

From: https://docs.msupply.org.nz/ - mSupply documentation wiki

Permanent link: https://docs.msupply.org.nz/receiving_goods:donors?rev=1687392009



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