



# User Guide

## 1. About mSupply

- 1.01. Introduction
- 1.02. Why mSupply?
- 1.03. Who uses mSupply?
- 1.04. Which combination of mSupply products best suits your organisation?
- 1.05. Terms, definitions and conventions used in this user guide

## 2. Setting up mSupply - technical guide

- 2.01. Requirements
- 2.02. Installation
- 2.03. Starting mSupply for the first time
- 2.04. Client/Server FAQ

## 3. Tutorial

- 3.01. The tutorial like no other
- 3.02. Logging in
- 3.03. Opening the example data file
- 3.04. Navigator
- 3.05. Creating and viewing items
- 3.06. Customers and suppliers
- 3.07. Viewing Names in Google Maps
- 3.08. Enter incoming goods (supplier invoices)

## 9. Issuing Goods

- 8.01. Issuing goods to a customer (customer invoices)
- 8.02. Viewing customer invoices
- 8.03. Backorders
- 8.04. Electronic invoices
- 8.05. Transferring goods to another store
- 8.06. Box management
- 8.07. Stock control methods for your customers (requisitions)
- 8.08. Customer budgets

## 10. Payments and Receipts

- 11.01. Payments to suppliers
- 11.02. Receiving payment from customers
- 11.03. Prescription payments and credits
- 11.04. Cash register

## 11. Data Import and Export

- 17.01. Importing items
- 17.02. Importing stock
- 17.03. Importing names
- 17.04. Importing prescribers
- 17.05. Importing abbreviations
- 17.06. Importing customer budgets
- 17.07. Importing

## 17. mSupply mobile (Android)

- 22.02. mSupply Mobile technical instructions for setup
- 22.03. mSupply configuration for mobile
- 22.01. mSupply Mobile user guide

## 18. Web Interface

- 19.01. Introduction to web interfaces
- 19.02. mSupply web server
- 19.03. mSupply customer web interface: setting up customers
- 19.04. mSupply customer web interface: guide for customers
- 19.05. Web Dashboard
- 19.06. Mobile Dashboard set up (after v4.0)
- 19.07. Online catalogue
- 19.08. Stock web app
- 19.09. mSupply REST API
- 19.10. mSupply legacy REST APIs
- 19.11. mSupply sync API
- 19.12. UNFPA LMA reports app

## 19. Integration of other systems with mSupply

A PDF version of the user guide can also be downloaded from the [mSupply site](#)



- 3.09. Enter outgoing goods (customer invoices)
- 3.10. Entering quotations
- 3.11. Working with lists
- 3.12. Where to now?

## 4. Items

- 4.01. About items
- 4.02. Adding a new item
- 4.03. Item categories
- 4.04. Item master lists
- 4.05. Programs
- 4.06. Stock locations and location types
- 4.07. Building (manufacturing) items
- 4.08. Merging two items
- 4.09. Ad hoc items
- 4.10. Non-stock items
- 4.11. Managing drug interaction groups
- 4.12. Managing item access with Departments
- 4.13. Prices in mSupply
- 4.14. Repacking items
- 4.15. Show items with stock
- 4.16. Splitting a stock line
- 4.17. Stocktakes
- 4.18. Phased stocktakes
- 4.19. Inventory adjustments
- 4.20. Units
- 4.21. Forecasting
- 4.22. Pickfaces and Replenishments setup
- 4.23. Pickfaces and Replenishments

## 5. Customers and Suppliers

- 5.01. Names: using, adding and editing

- locations
- 17.08. Importing supplier invoices
- 17.09. Importing assets
- 17.10. Importing regions
- 17.11. Importing requisitions
- 17.12. Importing supplier quotes into Tenders
- 17.13. Exporting items, exporting items and stock
- 17.14. Exporting locations
- 17.15. Exporting names
- 17.16. Exporting records
- 17.17. Exporting invoices
- 17.18. Exporting invoices to Moneyworks
- 17.19. Exporting to MYOB
- 17.20. Exporting sites
- 17.21. Exporting assets
- 17.22. Exporting to the dashboard

## 12. Dispensing Goods

- 10.01. Dispensary mode
- 10.02. Prescription entry
- 10.03. Patients
- 10.04. Patient insurance
- 10.05. Prescribers / Clinicians
- 10.06. Abbreviations for dispensing
- 10.07. Diagnoses
- 10.08. Label printing preferences
- 10.09. Warnings
- 10.10. Patient medication records
- 10.11. Printer setup for Remote Desktop Client
- 10.12. Patient type and Ward setup

## 13. Using Barcode

- 23.01. DHIS2 integration
- 23.02. FrontlineSMS integration
- 23.03. mSupply eLMIS interface
- 23.04. Moneyworks integration
- 23.05. MYOB
- 23.06. NHLMIS integration
- 23.07. HL7 and Tamanu integration

## 20. Technical Administration

- 25.01. mSupply client / server installation part 1
- 25.02. mSupply client / server installation part 2
- 25.03. mSupply client / server installation part 3
- 25.04. Schedules and periods
- 25.05. Web browser access via TSPlus
- 25.06. Backup
- 25.07. Updating mSupply
- 25.08. Changing users and passwords
- 25.09. Diagnostics
- 25.10. Finalising transactions
- 25.11. Managing data files
- 25.12. mSupply dispensary installation
- 25.13. mSupply server administration
- 25.14. mSupply deployment
- 25.15. Managing users
- 25.16. Show connected users
- 25.17. License management
- 25.18. Label printer hardware setup
- 25.19. The system log

- 5.02. Contacts
- 5.03. Merging two names
- 5.04. Name categories
- 5.05. Name tags
- 5.06. Suppliers: adding and viewing

## 6. Tenders

## 7. Purchasing

- 6.01. Ordering stock from suppliers
- 6.02. Managing purchase orders
- 6.03. Purchase order categories
- 6.04. Ordering from one store to another
- 6.05. Multi-store Purchase Orders

## 8. Receiving Goods

- 7.01. Supplier invoices
- 7.02. Goods receipts
- 7.03. Editing pack sizes
- 7.04. Managing outstanding purchase order lines (pipeline stock)
- 7.05. Custom stock fields
- 7.06. Managing donors

## Scanners

- 15.01. Barcode scanning
- 15.02. Adding barcodes to items
- 15.03. Barcode scanning and receiving goods
- 15.04. Barcode scanning and stocktaking
- 15.05. Barcode scanning and pick list checking
- 15.06. Barcode label printing
- 15.07. Barcode scanning and prescriptions

## 14. Hospital Info System (HIS) Module

- 20.01. Why a HIS module for mSupply?
- 20.02. Setting up wards and beds
- 20.03. ICD disease codes
- 20.04. Procedures
- 20.05. Patients
- 20.06. Encounters
- 20.07. Other lists
- 20.08. Statistics
- 20.09. HIS preferences

## 15. Preferences

- 16.01. General preferences
- 16.02. Purchase order preferences
- 16.03. Invoice preferences
- 16.04. Printing preferences
- 16.05. Mobile Dashboard set up (before v4.0)
- 16.06. Entering a new logo
- 16.07. Synchronisation preferences

- 25.20. Server troubleshooting
- 25.21. Help menu
- 25.22. Field descriptions

## 21. Table Descriptions

## 22. "Other Stuff"

- 26.01. Miscellaneous topics
- 26.02. Reminders
- 26.03. Transaction Status & Type Codes
- 26.04. Budgets
- 26.05. Edit menu
- 26.06. Transaction categories
- 26.07. Virtual stores
- 26.08. Bulk Store Preferences Editor
- 26.09. Custom data
- 26.10. Currencies
- 26.11. Using foreign currencies in transactions
- 26.12. Product (drug) registration
- 26.13. Using the mSupply remote client
- 26.14. Authorisation
- 26.15. Remote authorisation
- 26.16. Misc labels
- 26.17. Keyboard shortcuts
- 26.18. Troubleshooting

## 23. Frequently Asked Questions

- 28.01. How to re-set the mSupply client
- 28.02. Remote support - installing TeamViewer
- 28.03. Why is my stock balance report showing negative?
- 28.04. How to remove

- 16.08. FrontlineSMS
- 16.09. Barcode scanning preferences
- 16.10. Options (standard reasons)
- 16.11. Custom fields

## 16. Reports

- 13.01. Report basics
- 13.02. Stock and items reports
- 13.03. Transaction reports
- 13.04. Purchasing reports
- 13.05. Requisition reports
- 13.06. Dashboard
- 13.07. Customer ordered shortfall report
- 13.08. ATC and DDD code based reports
- 13.09. Other reports
- 13.10. Manage reports
- 13.11. Saving report templates
- 13.12. Custom reports
- 13.13. SuperReport editor

stock lines that have '0' available

- 28.05. What do I need to set up mSupply Mobile?
- 28.06. Why is my stock on hold?
- 28.07. How to correct wrong pack sizes
- 28.08. How to report by invoice category
- 28.09. Imprest work flow
- 28.10. Tips and tricks
- 28.11. Benefits of a multi-store system
- 28.12. How to access Temp folder
- 28.13. Fixing incorrectly received stock
- 28.14. Navigating inactive windows or form
- 28.15. Wastage Prediction due to expiry when ordering

From:

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

Permanent link:

<https://docs.msupply.org.nz/start?rev=1567610490>

Last update: **2019/09/04 15:21**

