# 3.06. Customers, Suppliers, and Contacts

## Adding a Customer or Supplier

For this tutorial example, we will first add a new supplier, then add a new customer.

#### Adding a Supplier

From the Navigator's opening screen, click on the 2nd of the large icons, **Suppliers** tab, then on the **New Supplier** 

You will be shown this window to enter the details:

00	Edit	customer/supplier	
General Invoices Backorders Quotes Notes Contacts Group Purchase orders Web log-in Item lists Stock history Store Photo	International Dispensary Association Name Code IDA Charge to IDA Name International Dispensary Association Master ID Master name Master name	Contact email web site Phone Fax Status Price Category Hold Preferred	Store: CMS Store   Currency EUR    Supplier details  Margin 0  Freight factor 1  Printing  Print invoices alphabetically
	Category     Other       Customer     Category 1       Supplier     Category 2       Manufacturer     Category 3       Benchmark	Category 4 none      Category 5 none      Category 6 none      Flag	Custom 1 Custom 2 Custom 3 Comment
	Main/Billing Address Address 1 IDA Address 2 Address 3 Address 4 Address 5 Post code Country	Postal address	Shipping address
Delete name		OK & N	ext Cancel OK

You can now enter the details for your new Supplier.

Field	What to do
Code	Enter "Acmep" to identify the Supplier (Acme Pharmaceuticals). You need to choose a unique code for each name. Try to choose a logical system, as the code is used to look up the Supplier (or Customer) when you are entering invoice data. (for example, try to start the code with at least the first three letters of the Supplier name)

Field	What to do		
Charge to	Enter "Acmep" again. This field is only used when exporting data to an accounting program - this code must match the code you use for the supplier in your accounting program.		
Name	Enter "Acme Pharmaceuticals" - the name of our supplier.		
Master ID	Ignore for now		
Category			
Customer check box	Leave this box unchecked, as we are entering a new Supplier.		
Supplier check box	As you chose "new supplier" this box is already checked.		
Manufacturer	Leave unchecked		
Benchmark	Leave unchecked		
Contact			
Email, Web site etc.	Fill in with the appropriate details		
Status			
Hold checkbox	If this box is checked for supplier or customer, that particular supplier or customer can neither supply nor be supplied with items.		
Preferred checkbox	Leave unchecked		
Price Category	This applies to customers. It is possible to assign multiple sell prices to customers. Leave it set to "A".		
Supplier details			
Currency	The field is automatically filled in with "Nrs" (=Nepali rupees - the default currency in our example data). This is the currency that this supplier will use to bill us.		
Margin	Enter "10". Items purchased from this supplier will have a 10% margin added to calculate the selling price.		
Freight factor	Enter "1". Acme Pharmaceuticals does not charge any freight to us. Their prices are "CIF" (Cost, Insurance & Freight to named port). This field is only used for comparing quotations from suppliers - it is not used for actual invoices.		
Other			
Category 1-6	Ignore for now		
Custom 1-3	Ignore for now		
Flag	Ignore for now		
Comment	You can enter a brief note here (Ignore it for now)		
Print invoices	Ignore for now		
Address			
Address, Main & Postal address.	You can complete these with appropriate values.		

If you are satisfied with the details, click **OK** . You will be returned to the mSupply® startup screen.

### Adding a Customer

From the Navigator's opening screen, click on the 1st of the large icons, *Customers*, near the top of the screen, and then click on "New Customer" from the Navigator screen that appears. You will be presented with a window similar to the *New Supplier* one above to enter the details:

Fill in the fields as follows:

Field	What to do	
Code	Enter "bluec"	
Charge to	Enter "bluec"	
Name	Enter "Blue Cross Hospital" - the name of our customer.	
Master ID	Ignore for now	
Category		
Customer check box	As you chose "new customer" this box is already checked.	
Supplier check box	Leave this box unchecked, as we are not entering a new Supplier.	
Manufacturer, Benchmark check boxes	Leave these unchecked too	
Status		
Hold checkbox	If this box is checked for supplier or customer, that particular supplier or customer can neither supply nor be supplied with items.	
Price Category	This applies to customers. It is possible to assign multiple sell prices to customers. Leave it set to "A".	
Contact		
email, web site, etc.	You can complete these with appropriate values.	
Other		
Category 1-6	Ignore for now	
Custom 1-3	Ignore for now	
Flag	Ignore for now	
Comment	You can enter a brief note here (Ignore it for now)	
Print invoices	Ignore for now	
Addresses		
Address, Main, Postal and Shipping address.	You can complete these with appropriate values.	

Click the OK button to save the details and exit the window.

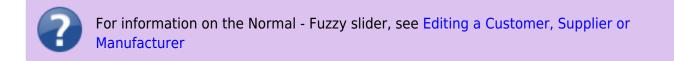
## Editing a Customer or Supplier

Let's now look up "Acme Pharmaceuticals"

• Choose *Show suppliers* ... from the Navigator's *Supplier* screen. You are presented with a window to enter as much of the Supplier name or the code as you know.

to Show suppliers	×
Normal 🛛 🚽 Fuzzy	
Name filter	
Name 💌 contains 💌	
and 💌 Category 1 💌 is Don't care	-
and   Customer group Don't care	•
Search	
All names Manufacturers	
Selection	
Customers Exclude patients	
Suppliers	
📝 Exclude hidden names	
Complex Find Cancel Find	

For this tutorial, just click the *Find* button - you will get a full list of all suppliers.



		-	-	5					1	<b>(</b>	8/22
New	M	odify	Set flags	Print	Find	Order by	Merge	Labels	Report	Customise	
Code	Charge		Name		Address 1		Address 2	Category	Flags	Phone	*
Acmep	Acmep	Acme F	Pharmaceuticals L	.td	Chhetrapati Road	Kathm	andu			+977-14237761	
arbuck	arbuck	Arbuck	le distribution		Begnas Tal	Pokha	ira			977-1-29292	
oronze	bronze	Bronze	Age supplies								
Diam	diam	Diamor	nd traders								
jold	gold	Gold m	edical supplies								
eaf	leaf	Leaf St	urgical supplies								
pearl	pearl	Pearl d	rug supplies								
oulo	pulo	Pulo W	orld Medicine Su	ppliers	12 Widget lane	Cluevi	lle				
4											-

• Double-click the "Acme Pharmaceuticals" entry in the list. You will be shown a window the same as you used to enter "Acme Pharmaceuticals" as a new supplier.

tit customer/s	upplier		
General Invoices	Acme Pharmaceuticals Ltd		Store: General 💌
Backorders Quotes Notes Contacts Emails Group Purchase orders Web log-in Favourites Stock history Store	Name Code Acmep Charge to Acmep Name Acme Pharmaceuticals Master ID 0 Master name	Contact email acmepharm@mail web site www.acmepharm Ltd Phone +977-14237761 Fax	currency currency
	Category Customer Supplier Manufacturei Benchmark	Status     Other       Hold     Category       Preferred     Category 2       Price Category     Category 3       A     Flag	e   Analysis  Comment  Print invoices
	Address Main or Billing address Address1 Chhetrapati Road Address2 Kathmandu Country Nepal	Postal address PO Box XYZ Kathmandu	Lat 27.7117 Long 85.3068 View on Map
Delete name			OK & Next Cancel OK

• Note the window has "Tabs" down the left side in the sidebar: "General", "Invoices", "Backorders", "Quotes" and "Notes", etc. Let's add a note for Acme pharmaceuticals:

• Click on the "Notes" tab.

0 0		
General Invoices Backorders Quotes Notes Contacts Group Purchase orders Web log-in Item lists Stock history Store	तिः तिः Master ID	Association tional Dispensary A 0 💿 r name
Photo	Category	Other
	Customer 🗌	Category
	Supplier 🗹	Category

- Click on the *New Note* button. Today's date is entered automatically and highlighted. Click inside the Note Entry field.
- Enter "This is a test note" then click the OK button.

Edit customer/supplier		
Acme Pharmaceuticals		Store: General
General Invoices Backor	Add Customer/Supplier notes	
New Note Delete No	Date 14/06/11	Entered by : user 1 (pass= Modfied by:
Date	Note This is a test note	
	Display when never	Pick Color     Beep     O times
		Cancel OK

- The first line of your note text will appear in the list of notes.
- Click OK to exit viewing/editing the supplier, then click OK again to exit the list of suppliers.

Previous: 3.1. Logging in | | Next: 3.3. Working with lists

Permanent link:

https://docs.msupply.org.nz/tutorial:customers\_suppliers\_contacts?rev=1566967847

3.06. Customers and suppliers

