3.06. Customers, suppliers, and contacts

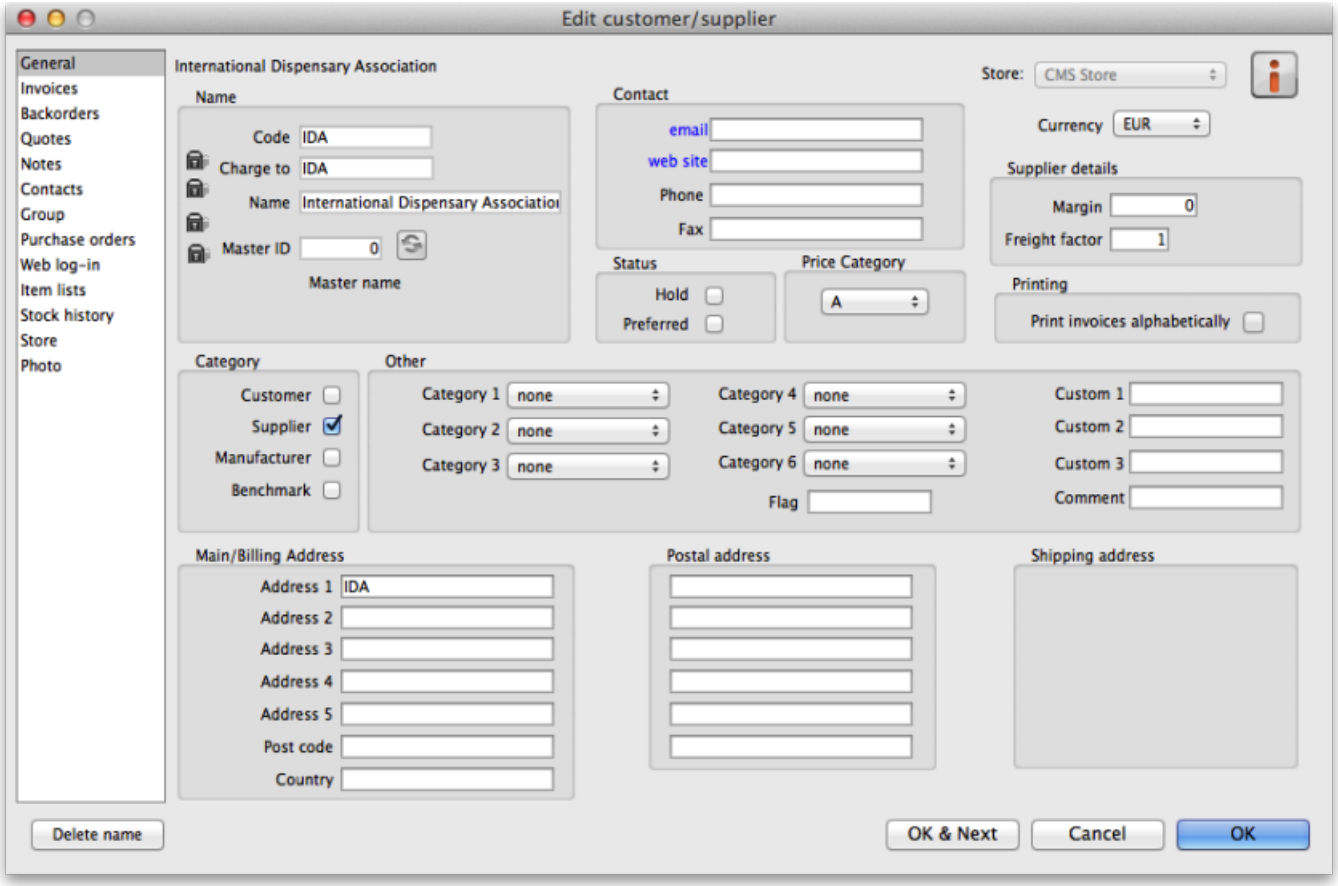
Adding a customer or supplier

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:



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:

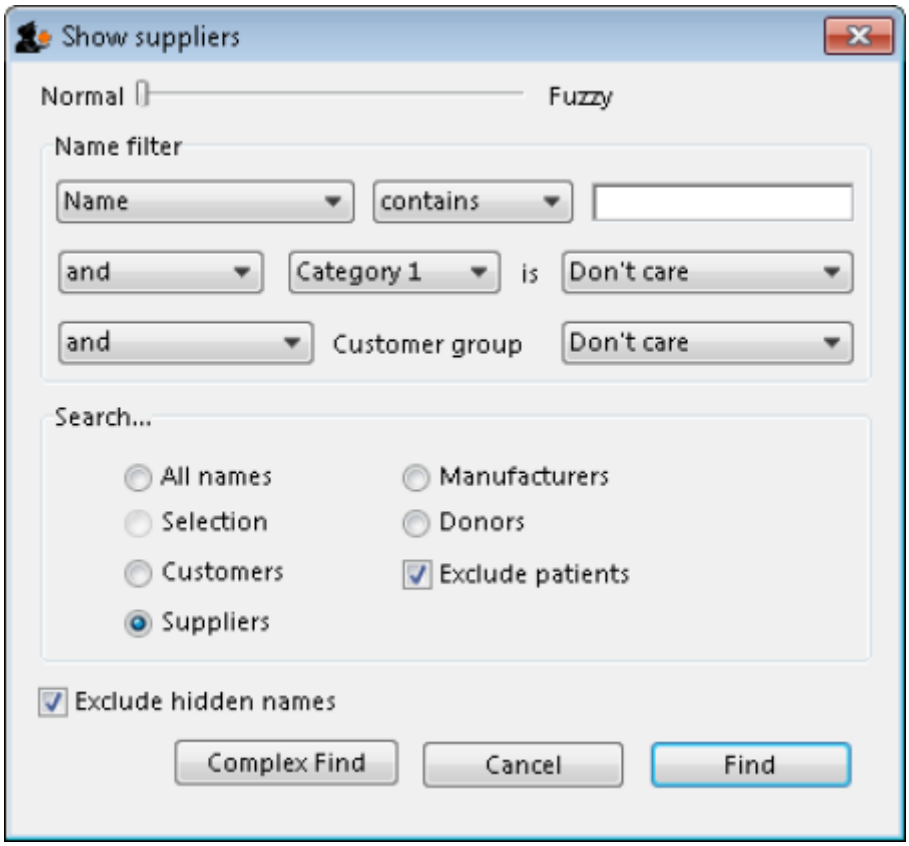
Field	What to do
Code	Enter “bluec”
Charge to	Enter “bluec”
Name	Enter “Blue Cross Hospital” - the name of our customer.
Master ID	Ignore for now
Category	
Customer check box	As you chose “new customer” this box is already checked.
Supplier check box	Leave this box unchecked, as we are not entering a 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

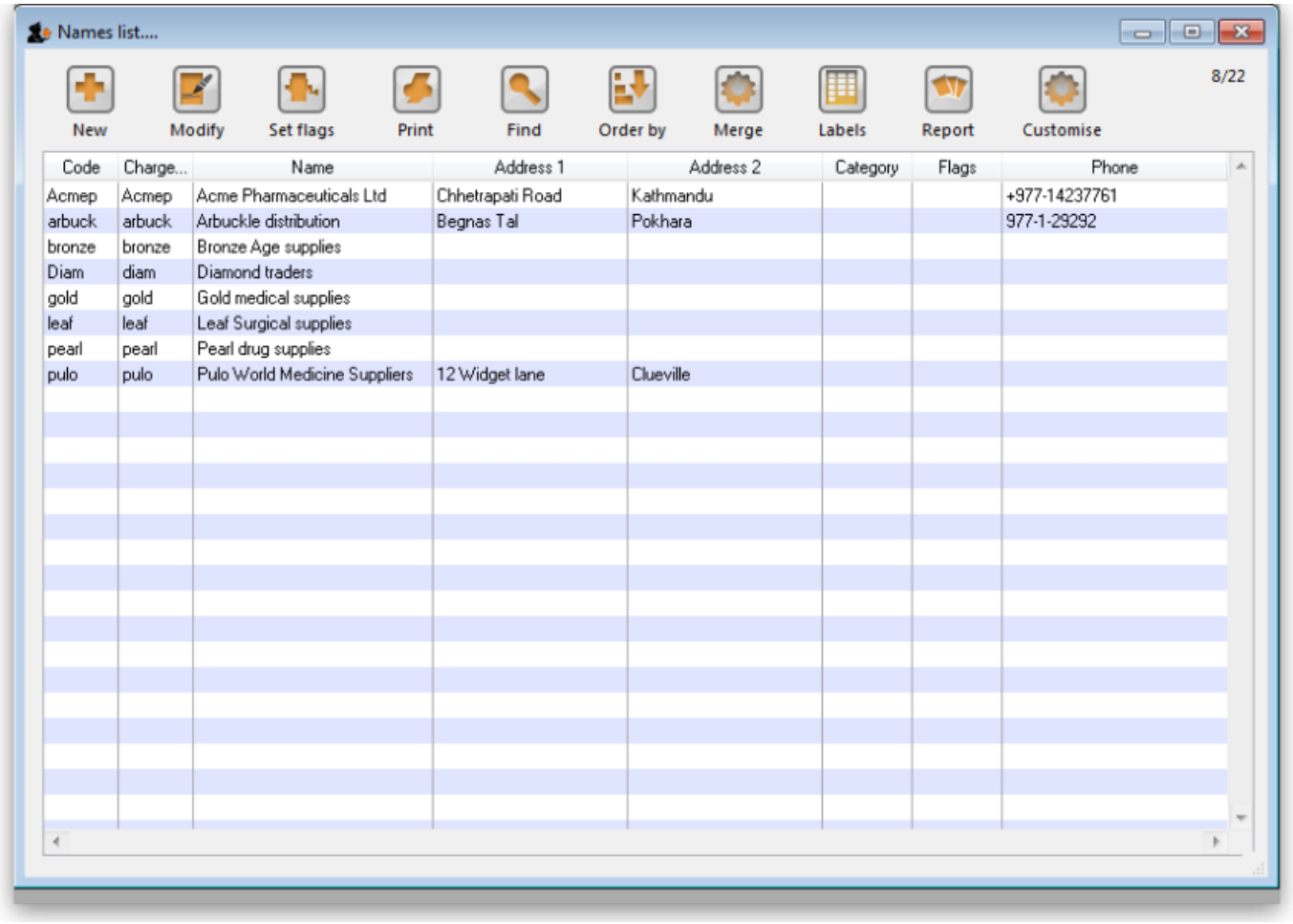
Let's now look up “Acme Pharmaceuticals”

- 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.

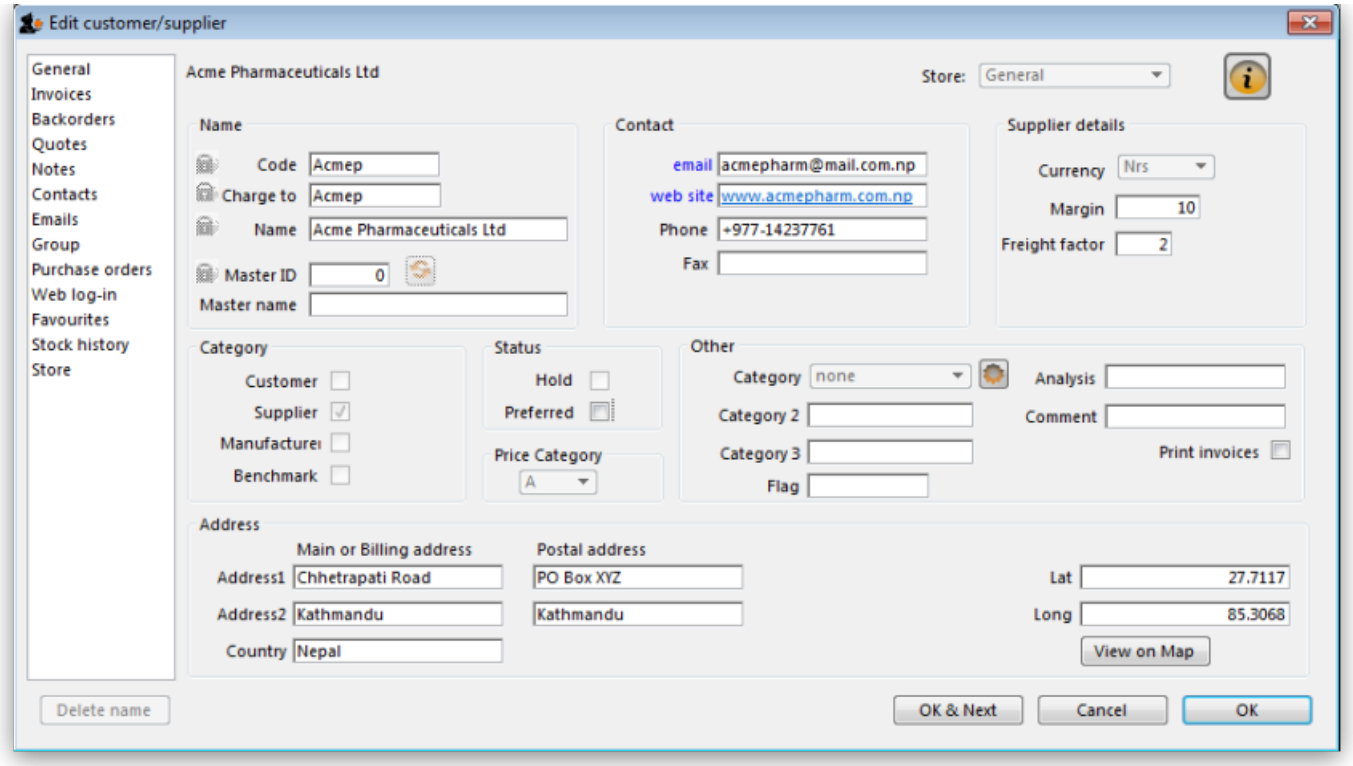


For this tutorial, just click the *Find* button - you will get a full list of all suppliers.

For information on the Normal - Fuzzy slider, see Editing a Customer, Supplier or Manufacturer

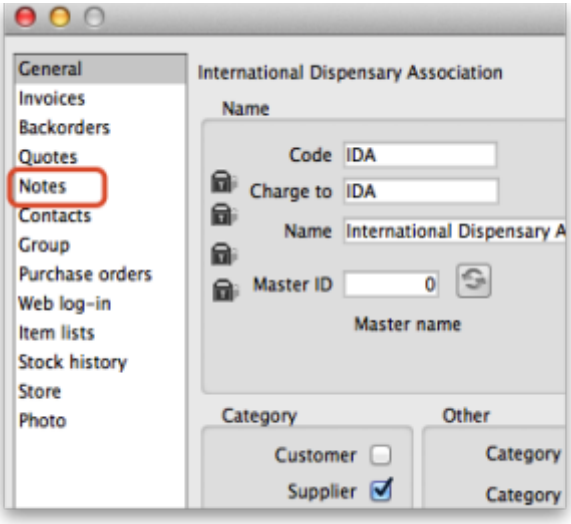


- Double-click the “Acme Pharmaceuticals” entry in the list. You will be shown a window the same as you used to enter “Acme Pharmaceuticals” as a new supplier.

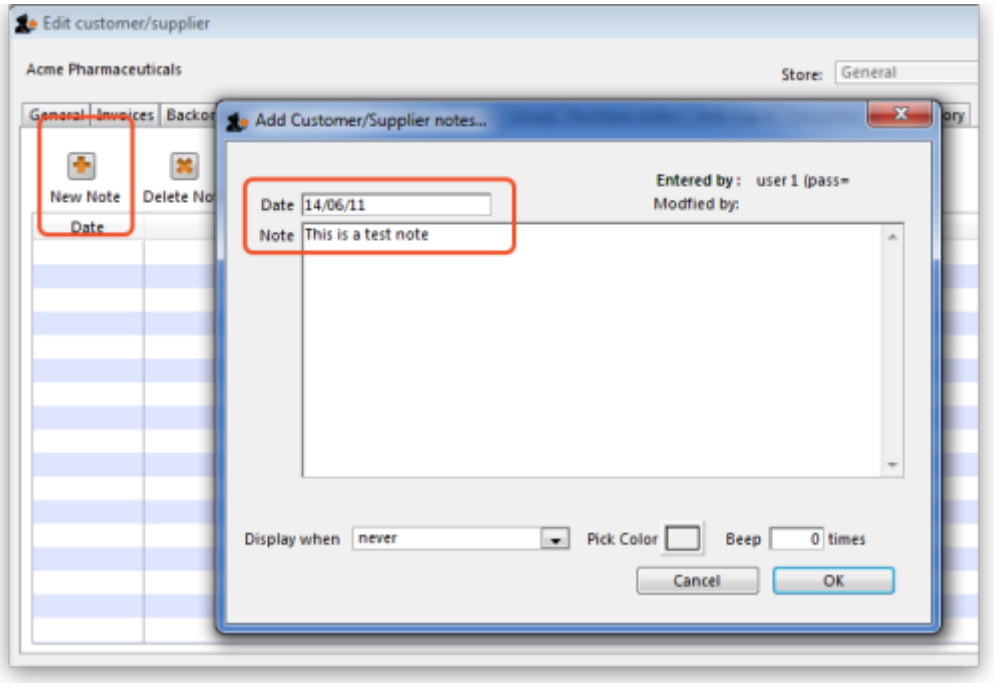


- Note the window has “Tabs” down the left side in the sidebar: “General”,“Invoices”, “Backorders”, “Quotes” and “Notes”, etc. Let's add a note for Acme pharmaceuticals:

- Click on the “Notes” tab.



- 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.



- 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** //

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

Permanent link:
https://docs.msupply.org.nz/tutorial:customers_suppliers_contacts?rev=1571245947

Last update: **2019/10/16 17:12**