The tutorial like no other

If some of the terms used below are not clear, please see Conventions used in this user guide.

Only mSupply®'s basic features are covered in the Tutorial; its many enhanced features are covered in depth in appropriate chapters in the User Guide.

mSupply Explained

This chart shows the common steps in most pharmaceutical supply processes. (Of course, the manufacturing step only applies to manufacturers!)

mSupply work flow diagram

work_flow_diag.png_direct_800

The two most common transaction types in mSupply® are the **supplier invoice (si)** and the **customer invoice (ci)**. These transactions record stock purchases from suppliers, and stock supplies to customers. mSupply® records a full audit trail by only allowing stock adjustments by way of a transaction. Therefore, given an opening balance of stock for the year, mSupply® can show a series of transactions that result in the recorded closing stock.

Of course, there is much more to it than that, but these two transactions are the core of the system.

Note that mSupply® has dozens of preference settings (**File>Preferences**) which change the behaviour of many aspects of the software. If you have customised Preferences from their default settings, some aspects of this tutorial may not be as stated below. To work through the tutorial, we recommend you start with a fresh copy of the example data to ensure the Preferences are set correctly.

Before starting the tutorial, you will need to have installed mSupply®, and opened the example database. If you haven't done so, see Installation

mSupply® runs best with a screen resolution of 1024 or 768 or greater. If you have your screen set to 950 x 850 or lower, some windows will not fit on the screen. To change screen resolution:

- Windows: Right click anywhere on the desktop, select **Properties** > **Settings** , and make the necessary changes.
- Macintosh: Choose **Apple** > **System Preferences...** then click on the **Displays** icon and set a new resolution

Opening the example data file

You will have two icons on your desktop - double-click the **mSupply** icon.

If you are opening mSupply® for the first time, the program should automatically open the example data file.

The full path to the data file is displayed, along with other useful information by choosing **Menu** >**Help**>**About mSupply**:

Le About mSupply			
mSupply versi	on		۵
You are using version 3.50 Release number 0 Release date 17/05/20	016	t14:18	Authorisation Version available for download Unknown Release number Unknown Date Unknown
Path to data file : C:\mSupply350\Database\mSuppl	ly.4DD		Click to check online 🛛 😒
Path to log file : Log file not used			
Path to structure file : C:\mSupply350\mSupply.exe			
Records		Curtainable Coludi	ons retains the rights to this software.
0 records in abbreviation	^		modification of this software only allowed with
3 records in account		authorization of Si email: info&msupp	ustainable Solutions (NZ) Ltd.
0 records in Admitted_from			inable Solutions (NZ) Ltd.
0 records in asset			
0 records in asset_condition			
0 records in asset_location			
0 records in asset_status			
0 records in asset_type 0 records in backorder			
0 records in bill_of_material		Structure update:	: 160517t1423
o records in an or inacenar	Ŧ		<u>Un</u>

If you have already been using mSupply® and have another data file open, but would like to open the example data file for use with this tutorial, then you can use the mSupply® menu **File > Open data file...** to open the example data file. In Windows, by default the example data folder is stored inside **c:/mSupply/database/**; navigate to the location and open the data file.

Organise - New folde	- -)iii 🕶 🔟 (
	Name	Date modified 1	lype	Size	
This PC	퉬 Logs	23/03/2015 9:37 a F	ile folder		
P Admin (theoffice	Preferences	5/03/2015 12:12 a F	ile folder		
admin@cityside. Cityside (theoffic	🍌 Resources	18/02/2015 11:05 a F	file folder		
Cityside (theoric Cityside (theoric	mSupply.4DD	23/03/2015 9:37 a 4	IDD File	4,801 KB	
	mSupply1.4DD	19/03/2015 11:29 a 4		3,009 KB	
Curators (theoffie Desktop Documents Downloads Pieannie (theoffice Music Pictures Videos Local Disk (C:)	mSupply2.4DD	19/03/2015 1:39 p 4		3,009 KB	
File <u>n</u>	ame			✓ 4D Data	File (*.4dd;*.data)
				Ωp	en Cancel

A password entry window is presented as mSupply® opens up a data file. The message panel informs the user that the example data base is in use.

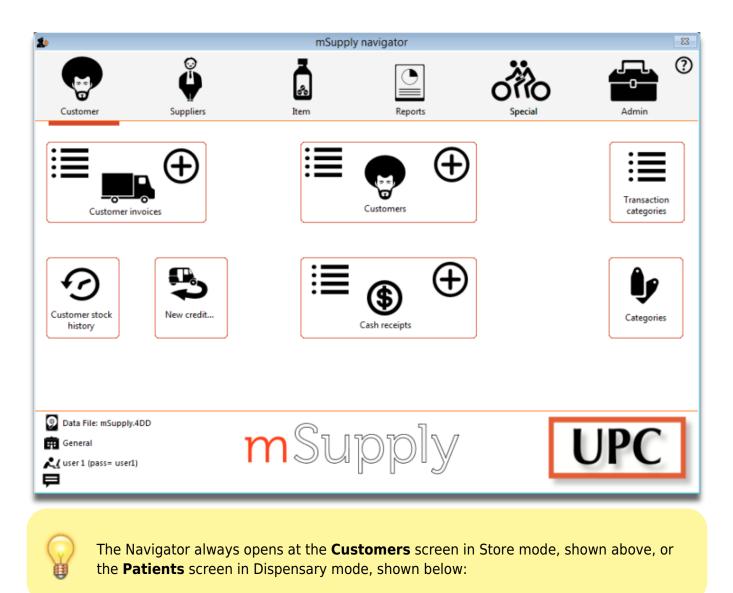
1	Log-in – 🗆 🗙
Search users	2. Enter your password
user 1 (pass= user1)	
	3. Choose store if available General
	4. Choose login mode if available Store
	5. Check any messages Warning: example data file loaded. Log in, then use File > Open data file if you want to connect to a different data file. This data file is C:\mSupply\Database\mSupply.4DD
~	6. Click the OK button to proceed Quit OK

The **"User 1" (pass= "user1")** entry should be highlighted, but if it is not, it should be selected. Enter "user1" (without the quotes) at **2.Enter your password**. The **Choose store** drop-down list will display **General**, and the **Choose login mode** ... dropdown list will display **Store** - these should not be changed. Click the **OK** button. After you have logged on, the Navigator screen appears:

The Navigator

Overview

The mSupply® Navigator provides access to most of the functions you will be using regularly in mSupply®. You will learn that many of these functions may also be opened with shortcut key sequences from the various **Menu items**, and once you have gained some experience, you may find it quicker to use the shortcuts.



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1 •	_		mSupply n	avigator			8
Patie	ants	Suppliers	الد الد	Reports	Special	Admin	?
	Prescriptio	⊕ I ns		Ratients	•	Transaction categories	
Supe	File: mSupply.4DD rvisor- All stores 1 (pass= user1)	ז	nSup	oply		UPC]

Displayed along the top of the screen are four items of information:

- the mode selected at logon (store or dispensary),
- the store in which you are working for most users, "General",
- the active **data file**,
- the **user** currently logged on.

Immediately below this, there are six large icons, **Customers** or **Patients, Suppliers Admin** ." Click on the icon appropriate to the task you are performing, and you will be presented with a panel displaying annotated icons listing the available functions and procedures; these are in turn selected either by clicking on the icon of your choice with the mouse, or by advancing through the icons with the right or left arrow keys and pressing the **Enter** key. You will be using the **Items** panel of the Navigator in the next step in the tutorial, and as the same procedures are common to all panels, you will quickly become familiar with them.

The bottom right area of the Navigator screen is available for displaying your own logo - the logo of "Acme Medical Supplies" is displayed in our example. The placing of your logo is performed by choosing **File > Preferences > Logo**. You can also read how to do it here.

Creating and viewing items

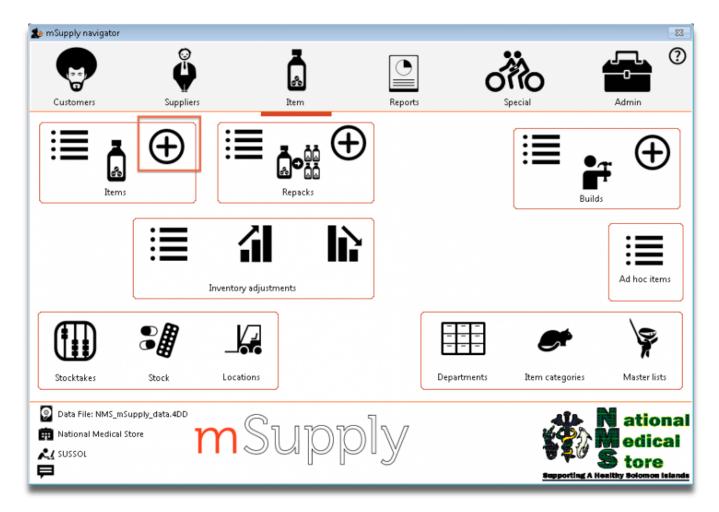
Creating a new item

For this section of the tutorial, we are going to add two new items to our mSupply® database. From

the Navigator's opening screen, click on **Item**, the 3rd of the large icons near the top of the screen



and the following screen appears:



- Click on the **New item** icon
- You are presented with a window with a number of fields to enter:

وا	Add item – 🗖 🗙
Туре	normal 💌
Item code	
Item name	
Units	None 🔻
Price list	ATC Category
Shelf location	DDD value 1
Preferred pack size	DDD factor 1
Category	None Weight 1
Normal stock	
Critical stock	
Essential drug	
	Cancel OK & Next OK

Below is a list of fields and the text to be entered into each field. Use the Tab key to advance from field to field or, using the mouse, click on the field you want to edit.

Type: The default entry **normal** is shown in the drop-down list, and should not be changed.

Item code: Enter amo500c then press the Tab key to advance to the next field.

Item name: Enter Amoxycillin 500mg tab/cap then press the Tab key to advance to the next field

Continue to use the *Tab* key for the rest of the tutorial when you need to advance to the next field.

Units: "None" is displayed by default. The options are: *unit*, *ea* (for each), *gm* and *ml*.

Price list: Click in the box so a check appears in it. This means that when we export a price list, the price for this item will be included.

Shelf location: Enter **a3.** Amoxycillin is stored on shelf 3 in the "a" section of our imaginary store. Note that "A" is interpreted differently from "a", so it is recommended to be consistent and use either all upper case or all lower case letters for entering shelf locations.

Preferred pack size: Enter **100**. This means we want a 100 unit pack to be our standard for comparing prices of this item.

Category: If a list of categories has been defined, this field allows the item which is being added to be placed in its appropriate category.

Normal stock, Critical stock, Essential drug, ATC category, DDD value, DDD factor, Weight, Non stock item, Default customer: For this tutorial, ignore these fields and leave them blank. Click the **OK & Next** button to add this item to mSupply[®]. The window's fields will clear allowing you to add a further item.



If you have no more items to add, click the *OK* button to add only the item just added and exit. If you accidentally click *OK* & *Next* and then want to exit, just click the *Cancel* button. The Amoxycillin 500mg tab/cap would still be entered, as it was saved when you pressed the *OK* & *Next* button.

Proceed to add a further item with the following details:

Note that if you make a mistake, you can click in a field and edit the value.

Field	Enter
Item code	"amo125s"
Item name	"Amoxycillin 125mg/5ml syrup"
Units	"mL"
Price list	check the check box.
Shelf location	enter "a7".
Preferred pack size	enter "60".

Click *OK* now that you have added the item, then click *Cancel* to exit the window.

Congratulations! You have now added 2 items to our example data file. Let's go and see how to find them.

Viewing item details

Click on **Show items** from the Navigator's Item screen.

nSupply navigator	Ŷ				ó	ño	
Patients	Suppliers	, , =:		Reports		Special	Admin
Items			epacks			Build	
	:=	Inventory adjustmen					Ad hoc items
	•					ø	1
Stocktakes	Stock	Locations		L	Departments	Item categories	Master lists
Data File: NMS_mSu National Medical Sto	pply_data.4DD pre	mSi	11010				N ation dedica

You will be presented with a window to find items:

ltem name	starts with		
and	o category is		9
and	VEN category is	Don't Care	0
and	Department is	Don't care	0
Rand		s from returned list.	
		ancel	Find

- Type "a" into the text entry area, then click the *Find* button.
- A list of all the items whose name or code starts with "a" is shown.

					Item	ist				
•										5/440
	Report	Set values	Find	Order by	Print	Modify	Duplicate	Customise		5/440
Item Code		ltem nar	ne	Default pa		Stock on I			Flags	
aci200t		vir 200mg tab			100			00		
alb400t		fazole tab 400m			100			00		
amo125tab		cillin 125mg Tab			100			28		_
amo250t		cillin 250mg tab			100		1195			
amo500t	Amoxi	cillin 500mg tab	/cap		100		80	00		
	_									
	_			_						
	_				_					

- We will choose the Amoxycillin 250mg tabs/caps an item that was already in the example data file. To choose the item, double-click anywhere on its line in the window.
- You will now be presented with a window that displays a lot of information about "Amoxycillin 250mg tab/caps". From this window you can see stock on hand, view and edit supplier quotations, view usage for this item for the last 24 months, view backorders, view, add and edit notes for this item. Phew!

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General	ltem name	Amoxicillin 250mg tab/cap		Stor	e: General	0
	E Item code	amo250t	Pricing			
General Misc Usage Stock Ledger Quotes Backorders Notes Reconcile Bill of materials Purchase Orders Order options Dispensing Drug registration Reporting Log Requisitions Stores	Item code General Units Department Category 2 Category 3 Interaction group Item flag Catalogue code Allo	amo250t ea None Sone None None None	Pricing Default r Default sell price of preferred pa Price editable when i Full description VEN Category Not assigned Vital Essential Necessary	margin 0 ucksize 0.0000 ssuing Stock category Norm Criti On essential Custom fields	0.0000 category Normal stock Critical stock On essential drug list	
	Shelf locations Shelf location Bulk shelf location Preferred pack size Volume per pack Restricted to :	None Outer pack v 100 Weight pe 0 m3	olume 0 m3	user user user	r_field_2 06.2.1 r_field_3 r_field_5 0.00 r_field_6 0 r_field_4 r_field_7	

- At this stage, we only want to know how to view the information. For an explanation of all the information displayed see Item Edit General Options
- When you have finished viewing the information, click the *OK* button to return to the list of items.
- If you want to view a different item, you can double-click its line. Otherwise click the X button in the top right corner (on Windows) or the top left corner (on a Mac) to exit to the **Navigator**.

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/sup	blier
General Invoices Backorders Quotes Notes Contacts Group Purchase orders Web log-in Item lists Stock history Store	Master ID 0 Status Master name Hold Preferred	Store: CMS Store +
Photo	Supplier 🧭 Category 2 none 💠 Ca	tegory 4 none Custom 1 tegory 5 none Custom 2 tegory 6 none Custom 3 Flag Comment tess Shipping address
Delete name	Address 1 IDA Address 2	OK & Next 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)					
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 s customers. Leave it set to "A".						

Field	What to do
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".

Field	What to do
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.

🖢 Show suppliers		— ×
Normal 🛛	Fuzz	y .
Name filter		
Name 💌	contains 🔹 🔻	
and 💌 Catego	is Do	on't care 👻
and 🔻 Cus	tomer group	on't care 👻
Search All names	Manufacturer	3
Selection	O Donors	
Customers	🔽 Exclude patie	nts
Suppliers		
Complex Find	Cancel	Find

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

Names	list					ſ			Ē			8/2
			•				*				*	-,
New	M	odify	Set flags	Print	Find	Ord	er by	Merge	Labels	Report	Customise	
Code	Charge		Name		Address 1			Address 2	Category	Flags	Pho	ne
Acmep	Acmep	Acme P	harmaceuticals	Ltd	Chhetrapati Road		Kathmar	idu			+977-14237761	
arbuck	arbuck	Arbuckl	e distribution		Begnas Tal		Pokhara				977-1-29292	
bronze	bronze	Bronze	Age supplies		-							
Diam	diam		d traders									
gold	gold	Gold me	edical supplies									
leaf	leaf		rgical supplies									
pearl	pearl		ug supplies									
pulo	pulo		orld Medicine S	uppliers	12 Widget lane		Clueville					
					-							
4												
												P

• 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.

🏚 Edit customer/si	upplier				—		
Edit customer/su General Invoices Backorders Quotes Notes Contacts Emails Group Purchase orders Web log-in Favourites Stock history Store	Acme Pharmaceuticals Ltd Acme Pharmaceuticals Ltd Name Code Acmep Charge to Acmep Name Acme Pharmaceuticals L Master ID O Master name Category		Store: General Contact email acmepharm@mail.com.np web site www.acmepharm.com.np Phone +977-14237761 Fax Other				
	Category Customer Supplier Manufacturei Benchmark Address Main or Billing address	Status Hold Preferred Price Category	Other Category none Category 2 Category 3 Flag	Analysis Comment P	Print invoices		
	Address1 Chhetrapati Road Address2 Kathmandu Country Nepal	PO Box XYZ Kathmandu		Lat Long View on N	27.7117 85.3068 Мар		
Delete name				OK & Next Cancel	ОК		

- 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.

00		
Ceneral Invoices Backorders Quotes Notes Contacts Group Purchase orders Web log-in Item lists Stock history Store	面; 面; 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.

cme Pharmace			Store:	eneral
New Note	ces Backor	Add Customer/Supplier notes Date 14/06/11 Note This is a test note	Entered by : user 1 (pass= Modfied by:	
		Display when never	Pick Color Beep O tim 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.

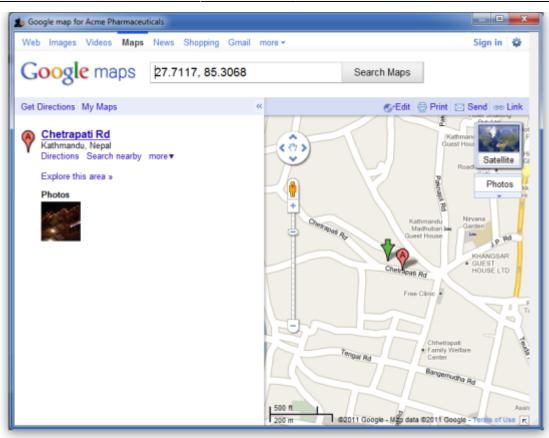
Viewing location in Google maps

If the precise geographical location of the supplier or customer is known, the **Lat** and **Long** fields can be completed in the *Photo* tab. Entries are made in these fields thus:

- decimal degrees, and not degrees, minutes and seconds
- in the Lat field, locations south of the Equator are entered as negative i.e. the number is preceded by a '-' sign
- in the **Long** field, locations west of the Prime meridian are entered as negative i.e. the number is preceded by a '-' sign

Don't know a precise location? Using Google Maps find the desired location and place the cursor on it. Right click and select **What's here** from the drop down list. The geographical co-ordinates are displayed at the top of the screen. These should be noted and copied to the appropriate **Lat** and **Long** fields in mSupply®

In our example, the location of the imaginary Acme Pharmaceuticals is on Chetrapati in Kathmandu. Click on the **Google Maps** button to display a map of the vicinity, with the precise location pinpointed by a green arrow.



Enter incoming goods (a supplier invoice)

In some countries an invoice for incoming goods is referred to as a "bill"- we use "supplier invoice" to mean the same thing.

Let's suppose we have just received a shipment containing two items from Acme Pharmaceuticals, and we want to enter these goods into stock. The invoice looks like this: <HTML>

</HTML>

From: Acme PharmaceuticalsBill no.:A939								
Item	Quan	Pack	Batch	Expiry	Price	Extension		
Amoxycillin Caps 250mg	1000	100	b93333	31/12/2015	344	344,000.00		
Cotrimoxazole 240mg/5mL susp	65	60	bb23d	31/10/2015	21	1,365.00		
Cotrimoxazole 240mg/5mL susp	100	60	bb22d	31/01/2016	21	2,100.00		
		-		-	Total:	347,465.00		

<HTML>

</HTML>

Choose **Supplier > New invoice** from the menu or navigator.

• • •		Supp	olier in	voice					
Name Name Their ref	lete line General Item Name	L c	Entry of onfirm of ory Not	date : 2 date : 0	9/12/20 0/00/00 Batch Batch		Goods I Purchas	Colour ce number : Status : received ID : e Order ID : Entered by : Store: Sell Price	0 nw 0
	Other charges Item(s): Amount:	0.00						Subtotal: 0 % tax: Total:	0.00 0.00 0.00
Hold Finalise	Export batch: 0 Margin: 0.00				ока	& Next	Delete		ок 🛛 🛇

The cursor will be positioned in the *Name* field. Type "a" and then press the tab key. If there is only one supplier whose name starts with "a", the details will automatically be filled in.

Lane a		Entry date : 14/06/2011	- 1
Their ref		Confirm date : 00/00/00	In
Comment	to Choose name		×
Rew line Delete line	New		Go Purc
General Summary by Ite	Name	Code	<u>^</u>
L Lo	Acme Pharmaceuticals Arbuckle distribution	Acmep arbuck	: Price

In our case the supplier "Arbuckle distribution" was already present, so you are presented with a window listing the suppliers starting with "a". Double-click the line containing "Acme Pharmaceuticals" to choose them for this invoice. The insertion point will jump to the *Their ref.* field.

Type "A939" into the *Their ref.* field. Press the Tab key to advance to the *Comment* field.

In the *Comment* field you can type a comment or information to identify the invoice.

Note that the margin is showing as 10 percent (the percentage that will be added to your cost price to obtain the selling price).

Click the *New line* button to add the first invoice line. You will be presented with the window for adding invoice lines.

	Ad	d/edit supplier invoice line
ltem	I	
Quantity	0	New item
Pack size	1	Pack to one
Total quantity:	0	
Batch		Location
Expiry	00/00/00	Volume per pack m3 🛐
Invoice line unit cost (NPR)	0.0000	Adjusted local cost% MarginSell price0.000.000.0000
Price extension (NPR)	0.00	Donor
		Cancel OK OK & Next

- The cursor will be positioned in the *Item* field. Type "a", then press the Tab key. You will be presented with a window listing all items whose name starts with "a". Double-click the "Amoxycillin 250mg tab/cap" entry to choose it. The cursor will now be positioned in the "Quantity" field.
- Enter the number of packs received in the *Quantity* field: "1000" (Note that this is the number of packs, not the total quantity of capsules). Press Tab to advance to the next field.
- Enter the pack size: "100." Press Tab to advance to the next field.
- The cursor will now be in the location field. Ignore this for now and press Tab again.
- You can also ignore the Volume per pack field and press Tab to keep going.
- Enter the batch number: "b93333." Press Tab to advance to the next field.
- Enter the expiry date: "31/12/2014" (Presuming you have dates set up to enter as dd/mm/yy. If your dates are set to the USA's mm/dd/yy format, enter "12/31/14"). You only have to enter 2 digits for the year, as long as the year is in the range 1961 to 2060. Dates outside this range must have the year entered as four digits. Press Tab to advance to the next field.
- In the "Invoice line cost" field enter the pack cost price: "344"
- The table shown in the picture at the bottom appears if you have *Show previous purchases* checked in your preferences. It will show purchases you have made of this item in the past.
- *Donor* is the donor who provided funds for the goods on this invoice. You can create donors by activating donor tracking in File/Preferences/Suppliers/New Supplier and then check the donor check box.

As we have another line to add, click the *OK and Next* button. The entry is recorded, and the window is now blank to accept your second invoice line.

- Enter "c" into the *item name* field and press tab. In the list of items showing, you will find "Cotrimoxazole 240mg/5mL susp". Double-click the entry.
- Enter the remaining invoice details for "Cotrimoxazole 240mg/5mL susp":
- num units: "65"
- pack size: "60" (Note that it is better to record the actual volume of most packs, unless the volume is not important- for example with an eye-drop, where you could record the pack as "1")
- batch: "bb23d"
- expiry: "31/12/2013"
- price: "21.00" (You can just enter "21")

Click the OK & Next button to save the details and start to enter another item.

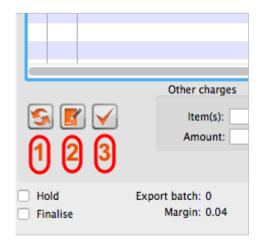
Now enter the third item on the supplier invoice from the example invoice from Acme Pharmaceuticals example invoice above.

When you have finished, click the OK button to take you back to the main list of invoices.

Our invoice will now have 3 items added to it. The invoice total should read "347,465", and should appear like this:

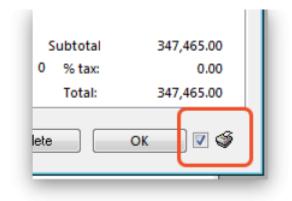
🏚 Su	pplier	invoice										×
	ir ref 🛛	Acme Pharn A939	naceuticals	Acmep		-	te: 14/06/2 te: 00/00/0				er: 12 us: nw	
New		Delete line Summary by		nary by Batch Price	Categ	gory N	lone		-			er1
L.,	. Lo		Item N	ame	Qty	Pack	Batch	Expiry	Cost Price	Sell Price	Price extension	*
1		Amoxicillin	n 250mg tab/	cap	1000	100	B93333	31/12/15	344.00	344.00	344,000.00	
2		Cotrimoxa	zole 240mg/	5ml susp	65	60	BB23D	31/10/15	21.00	21.00	1,365.00	
3		Cotrimoxa	zole 240mg/!	5ml susp	100	60	BB22D	31/01/16	21.00	21.00	2,100.00	
	old nalize	Export t	ether charges em(s): nount: patch: 0 argin: 0.00	0.00	5			OK & Next		Subtot 0 % ta: Tota	x: 0.00)

If you have made a mistake, click on the relevant line , which will now be highlighted; double-clicking on it allows you to edit it. You will be shown the line details again, and you can then make corrections and click the *OK* button to save your changes. There are 3 icons in the lower left corner of the invoice window.



- 1. This allows you to rearrange the order in which the lines are shown on the invoice
- 2. Here you can make a note of anything relevant to this invoice
- 3. This will copy the details of the invoice to the clipboard

Now click the *OK* button. As long as you have left the "print" check box (bottom right corner) checked, you will be asked if you want to print the invoice (you may do so). Note that when you print, you are shown two windows. The first window is the page setup for your printer, the second window allows you to specify how many copies to print, etc. (The second window also has "preview" check box, where you can preview the print job).



As this invoice is a "supplier invoice" it has been "confirmed" when you clicked the OK button in the invoice entry window. You can view and edit the invoice details until the invoice is finalised. Note that if you issue some of the stock you have just entered to a customer, some fields relating to that stock will no longer be edit-able.

NOTE - As of mSupply® v190, a more precise alternative for entering received goods has been implemented. See Viewing and editing supplier invoices created via Goods Receipts

Enter outgoing goods (a customer invoice)

Now let's suppose we have just received an order as follows: <HTML>

</HTML>

From:	Blue Cross Hospital
Order number:	PO882
Delivery: Express courier please	
Item	Quan
Amoxycillin 250mg tab/caps	10,000
Cotrimoxazole 240mg/5mL susp	120

<HTML>

</HTML>

Choose New Invoice from the Customer menu, and the following window appears:

00		Cust	tomer inv	voice				
Name Name	↓	Co	nfirm date	00/00/00			Colour : Black	£
Their ref							Invoice : 0	
Comment	•••••••••••••••••••••••••••••••••••••••		Category	None		\$	Entry date : 11/02/13	
Scripts			ITems				Goods receive ID : 0	
							Status : nw	
-				1			Entered by : sussol	
New line De	lete line(s)			History		Confirm	Store : CMS Store	
		y by Item	Summary	by Batch	Transport	details		
L Location	Item Name	Quan	Pack Size	Batch	Exp date	Sell Price	Price exten	- 11
								- 11
								18
								_ 11
								- 11
								18
	Other charges	item:					Amount:	0.00
🗄 🖬 🖪 🛃	other charges	, nem.					Subtotal:	0.00
							0 % tax:	0.00
							Total:	0.00
Hold Finalize	Export batch: 0				OK &	Next	Delete OK (- 🏈

Type "b" into the *Name* field, and press the Tab key. You will be presented with a list of customers whose name starts with "b". Double-click the "Blue Cross Hospital" entry to select it.

- In the Their ref field enter "PO882".
- In the **Comment** field enter "This afternoon by courier"
- Click the **New line** button to add a line to the invoice. You are presented with the "Add item" window.

	A	dd item		
Item			1	
Line 0 Quan 0 of 0				
Pack 0	Bulk/Outer pack size	0		
		(Cancel OK	OK & Next

Enter the following details:

• Type "a" into the *Name* field then press the Tab key. In the list you are presented with, doubleclick the "Amoxycillin 250mg tab/cap" entry.

Item name	Item code	Stock on Hand	*
Aluminium diacetate solution, 13%	alu13s	0	
Aluminium hydroxide 320mg/5ml oral susp	alu500s	0	
Aluminium hydroxide 500mg tab	alu500t	0	
Amiloride hydrochloride 5mg tab	ami5t	0	
Amoxicillin + clavulanic ac 500mg tab	amoc500t	0	
Amoxicillin 125mg Tab	amo125tab	78	
Amoxicillin 250mg tab/cap	amo250t	120000	
Amoxicillin 500mg tab/cap	amo500t	4000	Ξ
Amphotericin b 50mg inj	amp50i	0	
Ampicillin sod 500mg inj.	amp500i	0	
Anti-d immunoglobulin (human) 250mcg inj	antd250i	0	
Antiscorpion sera inj	antsi	0	
Antitetanus immunoglob (human) 500IU inj	antt500i	0	
Antivenom serum	antvi	0	
Artemether 80mg/ml inj	art80i	0	Ŧ
Double-Click the item you want			

• You will see that a list of available stock has appeared in the window, and the cursor has moved to the **Line number** field. Enter "2" to choose line 2. (The list is sorted so batches with the shortest expiry date are at the top - usually you would choose the shortest expiry batch, but today we're being different!).

Line 1 Quan 100 of 190 Pack 100 ea				cap Bulk/Ou	iter pac	k size	0			amo250t		Nev	w item
	Ad	Id Place P Issue 0	Availa	Tot in st 200	Pack 100	H	Batch b39399	Expdate 01/01/12	Supplier arbuck	Location A	Cost Pr 343.00	Sell pr 343.00	Status
	2	0	1000	1000	100		893333	31/12/15	Acmep		344.00	344.00	
	4												Þ

• Quantity field - the line we have chosen has a pack size of "100", so we need to enter a quantity of "100" to make a total of 10,000

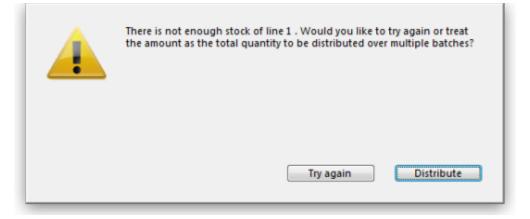
Click the **OK & next** button to add the second line of the order.

This time enter "c" and press the tab key. Double-click the "Cotrimoxazole 240mg/5mL susp" entry. The window will close and the list of available batches and quantities will be completed.

Item Cotrimoxazole 240mg/5				5ml susp					1	cot240s		New item			
Quan Pack	_	0 of 60 ml	65	Bulk/Ou	iter pac	k size	0								
	_	id Place I													
	U		Availa		Pack		Batch	Expdate	Supplier	Location	Cost Pr	-	Status		
	1	0	65		60		BB23D	31/10/15			21.00				
	2	0	100	100	60		BB22D	31/01/16	Acmep		21.00	21.00			

Note that in the list of available stock, the second line we entered from "Acme pharmaceuticals" is now at the top of the list - this is because the list is sorted so that the item with the shortest expiry date comes to the top of the list.

Line 1 is selected, despite the fact that there is insufficient stock of line 1 to meet the order of 120. Nevertheless, you should enter "120" in the *Quantity* field, press **Tab**, and the following message will appear:



For this tutorial, choose **Distribute** (which is likely to be your normal choice), and the necessary stock to complete the order will be drawn from another batch/other batches, starting with the batch which will be the first to expire. There will be occasions, however, when you wish to override this automatic means of distribution, and in this event you would select *Try Again* and manually select the batches from which you wish to meet the order.

Click the OK & Next button

Because the invoice has not been confirmed, the "available" amount for the line has been reduced, but the "total stc" (total stock) is still showing as "100". mSupply® includes these lines in the list so you can see stock that has been allocated to an invoice but has not yet left your store. You can then edit the other invoice if stock is urgently needed on the current invoice.

Click *OK* as we are finished entering lines. You will be returned to the main Customer invoice window.

		lame	Blue Cros	ss Hospital		Cont	firm date	00/00/00				Colour :	Black		
	The	ir re	f PO882		bluec							Invoice :	16		
0	om	nen	t This after	noon by courie	er 📕	-	Category	None			En	try date :	16/06/11		
						_					Goods re	ceive ID :	0		
		÷.		6.			R R 🖶					Status : nw			
	N	ew li	ine Del	ete line(s)			Backo	-	listory	😽 Confirm	Ent	ered by :	user 1 (pass= (user1	
			ine bei	ere inte(s)			bucko	acro i	listory	Confirm		-	General		
Г	Gen	eral	Summary	by Item Summ	ary by Batch Trans	port details	1					store.	General		
		L	Location		Item Name		Quan	Pack Size	Batch	Exp date	Sell Price	Pri	ce exten	~	
		1	A	Amoxicillin 25			100	100	b39399	-	343.00		34,300.00		
		2			240mg/5ml susp		65	60	BB23D		21.00		1,365.00		
		3		Cotrimoxazole	240mg/5ml susp		55	60	BB22D	31/01/16	21.00		1,155.00		
														-	
	_	_			Other charges	Itom Course	ier charge					Amount: [20/	0.00	
	4	G) 🛃 🛃]	other charges	Item: Cour	ier charge					ubtotal:	37,02		
											-	0 % tax:	-	0.00	
												Total:	37,02		
	-												27,020		
	_	old naliz	e Evo	ort batch: 0					UK & NEXT	_	Delete		UK	-69	
Ľ		Idiiiz	e cxpo	and buttern v											

At the bottom right of the invoice you will see the invoice total.

- As the customer has requested an express courier, we will charge them Rs200 for the service (Rs = "rupees" the currency in our tutorial). At the bottom of the window you will see the *Other charges* field:
- There, enter "Courier charge" and press the Tab key
- In the "amount" field enter "200" and press the **Tab** key. The new total should be "37,020.00"

Now we are ready to print a packing slip. Make sure that **Print** is checked in the bottom right corner, and click **OK**; a window appears displaying your print options:

Form to use pick_slip_1	Remember this choice
Message	Destination
	Printer
	O Preview
	O PDF file on disk
	C Email PDF
	Export to Excel

We want to print a packing slip, so the default settings suit our purpose. You will notice the packing slip printed has a column where you can write down the actual quantity packed.

Confirming the invoice:

Let's suppose the order was successfully packed according to the packing slip, and you now want to confirm the order and print an invoice to pack with the goods. (We're in a hurry - the express courier is on her way!)

First, we need to look up the invoice. Here's an easy way to look up the last invoice you have entered:

- Choose **Show invoices..** from the **Customer** menu.
- If you know the invoice number (printed on the packing slip) you can enter it. To bring a list of the most recent invoices, you enter the number of invoices to view. As we know the invoice we want is the last one to be entered, we just type "1" and click **OK** - you will be taken straight to the invoice.

Click the **Confirm** truck icon,

Confirm date	00/00/00	
Catagoni	Stock History Ord	or =
Category	Stock History Ord	ei +
Backorders	History	Confirm

and today's date will appear in the **Confirm date** field. Click **OK** to confirm you want to proceed.

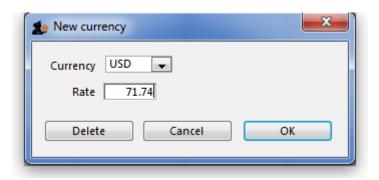
The invoice is confirmed, and you are given the opportunity to print an invoice.

Entering Quotations

mSupply® allows you to keep a record of prices that suppliers have quoted to you. Let's assume that you have just received 2 quotations for Amoxycillin 250mg capsules; one of the companies has used US dollars for their quotation, and the other has used British pounds, so before entering the details of the quotations, it is necessary that both of these currencies are recognised. To achieve this, choose the menu item **Special > Currencies**, and this window appears:

turrencies				×
•			S	
New	Update mSupply	Rate	Get Internet Rates	
Currency	mSupply Rate	Last Updated	Internet Rate	*
Nrs	1		0	
				Ŧ
•			4	
Rate	es provided by Yahoo!		ОК	-

Click on the New button, and a window appears which allows you to enter another currency:



Enter "USD" in the Currency field; in the Rate field you should enter the number of units of the default currency - in this case Nepali Rupees - equivalent to 1 US dollar; at the time of compiling this tutorial, the rate was 71.74 N.Rs. to US \$1, so "71.74" is entered in the **Rate** field. Click on the **OK** button, and repeat the exercise for British pounds, the rate presently being 116.36.

Once you have performed this, the Currencies window should look like this:

Currencies										
New	Update mSupply	Get Internet Rates								
Currency	mSupply Rate	Last Updated	Internet Rate							
GBP	135.304		0							
NPR	1		0							
USD	108.408	19/12/16	0							
Rates provided by Yahoo!										
Rat	OK									

We're now ready to proceed.

To enter a quotation:

1. Choose **Items > Show items**

- 2. Type "Amox" then press Enter.
- 3. Double-click the "Amoxycillin 250mg caps" entry from the list.
- 4. The item view window, on the left, has vertical content list (General, Usage, Quotes). Click the **Quotes** line.
- 5. Click the "New Quote" button.
- 6. Note that the item is entered for us. We need to choose a supplier and enter their price details.
- 7. Enter "Arb" in the supplier field and press tab. Arbuckle distribution is automatically chosen. They have quoted in US dollars, so choose "USD" from the currency menu.
- 8. Their price is US \$3.50 per 100 capsules, so enter "3.5" in the price field and "100" in the pack size field.
- 9. Click **OK** to save the entry
- 10. Now click "new quote" again and enter the following details:

<html>

</HTML>

Supplier	Gold Medical Supplies
Currency	Sterling [GBP]
Price	20.00
Pack size	1000

<HTML>

</HTML>

Click **OK** when you are done.

Now we can see the list of quotes, which should look like this:

•••						Item de	tails							
General Misc Usage Stock	6) 6)	Item name Item code		n 250mg	g tab/cap							Store:	General	٥
Ledger Quotes Backorders	_	quote	Delete q	Juote	Show:	All		0						
Notes	Date	Sup	olier	Cur	Rate	Price	Pack s	Freight	Strip	Cost	Adj Cost	Preferred	Valid until	Manufact
Reconcile	3/06/16	Arbuckle di	stribution	USD	108.4080	11.21	1000	1.00		1,215.25	121.5253	v		
Bill of materials		Bronze Age		NPR	1.0000	2,000.00	1000	1.00			200.0000			
Purchase Orders		Drug Price I		USD	108.4080	3.00	100	1.00			325.2240			
Order options	29/12/16	Arbuckle di	stribution	NPR	1.0000	3.50	100	1.00		3.50	3.5000			
Dispensing														
Drug registration														
Reporting														
Log														
Requisitions														
Stores														
	_	1								1				
Delete							OK &	Previous		OK &	Next	Can	cel	OK

Notice how the adjusted price takes into account differences in pack size and currency, so you can easily compare suppliers.

Thanks for working through the tutorial. We hope you learnt something useful, and now feel confident to start using mSupply®!

Where to now?

- Use the example database to experiment with different commands as you read about them in the user guide.
- Have a "dummy run" at starting a new data file and using it.
- Return to our main documentation page at www.docs.msupply.org.nz

Previous: Logging in Next: Working with lists

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Permanent link: https://docs.msupply.org.nz/tutorial:full_tutorial?rev=1558935547

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