

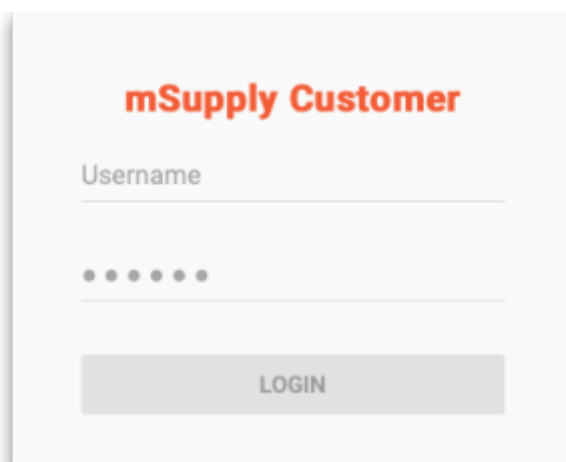
## 18.04. mSupply customer web interface: guide for customers

The first section of this page covers the use of the interface itself by the customer. There is a small [Back at the supplying store...](#) section at the end which describes what happens in mSupply in response to the orders sent by the customer.

### Logging in

You will be given an website address for the customer interface. e.g. <http://example.com:8080/customer/>. Go to that address using an internet browser running on a smartphone, laptop, tablet or desktop computer etc.

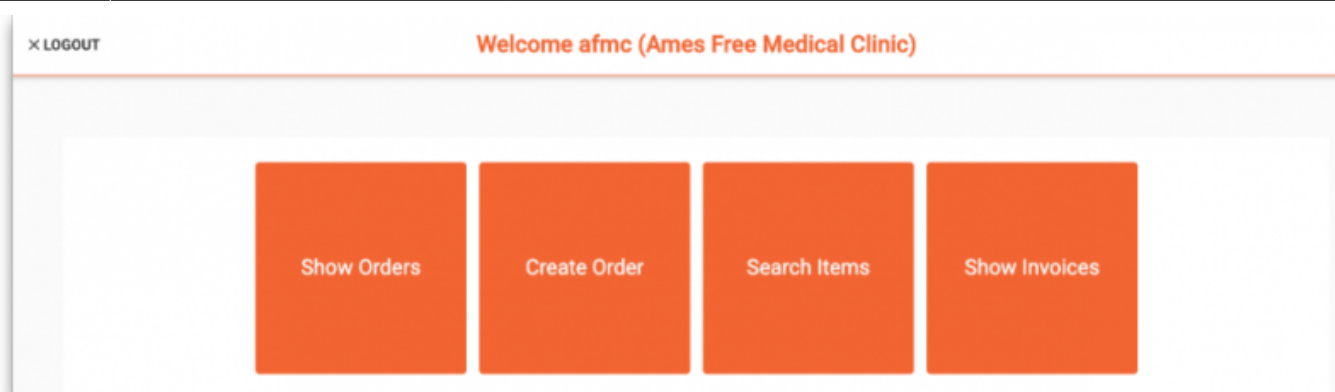
When it has loaded (the time this takes will depend on the speed of your internet connection), you will be shown the login page:

The image shows a login form for the mSupply Customer interface. At the top, the text "mSupply Customer" is displayed in a bold, orange font. Below this, there is a label "Username" followed by a text input field. Underneath the username field is a password field represented by five dots. At the bottom of the form is a grey button with the word "LOGIN" in capital letters.

Enter your username and password and click **Login**

### The navigator

You are now shown the mSupply customer navigator screen:



Here we are logged in as user “afms” who works for the customer “Ames Free Medical Clinic”.

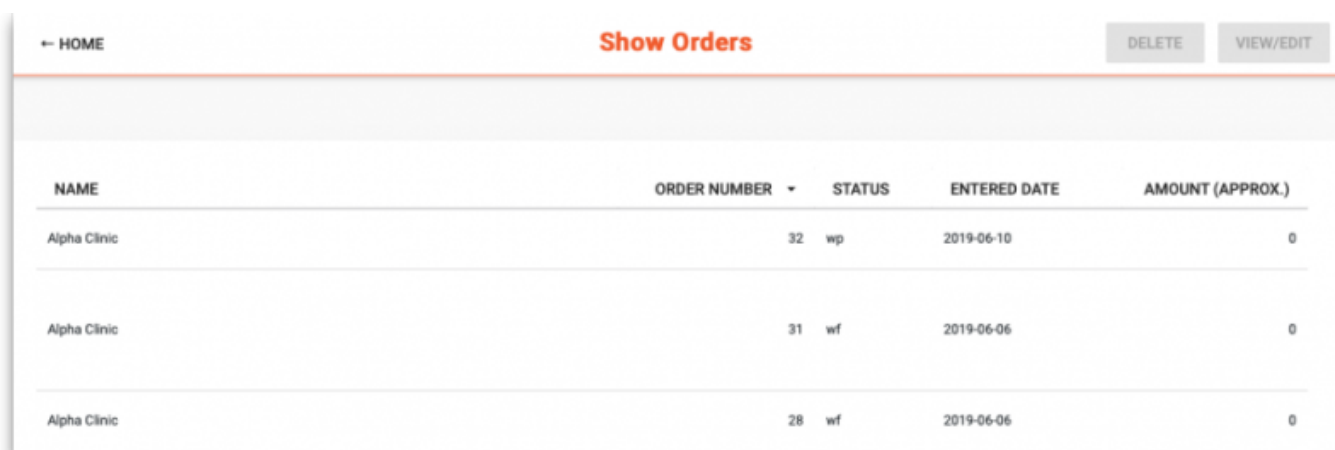
The “Ames Free Medical Clinic” is set to use the store “General Warehouse” as their supplying store.

Click on:

- [Show Orders](#) to view a list of orders that have been created but not yet completed.
- [Create Order](#) to create a new order for stock from the supplying store.
- [Search Items](#) to search a list of Items available in the supplying store.
- [Show Invoices](#) to search for and view a list of invoices from the supplying store.

## Show orders

Select **Show Orders** to display a list of orders that have been created.



NAME	ORDER NUMBER	STATUS	ENTERED DATE	AMOUNT (APPROX.)
Alpha Clinic	32	wp	2019-06-10	0
Alpha Clinic	31	wf	2019-06-06	0
Alpha Clinic	28	wf	2019-06-06	0

To view or edit an existing order, click on the order in the table to highlight it, then click on the **View/Edit** button (top right)

To delete an existing order, click on the order in the table to highlight it, then click on the **Delete** button (top right)

Status wp indicates web interface orders that have been created and are still in progress (not yet finalised). These can be edited/deleted.

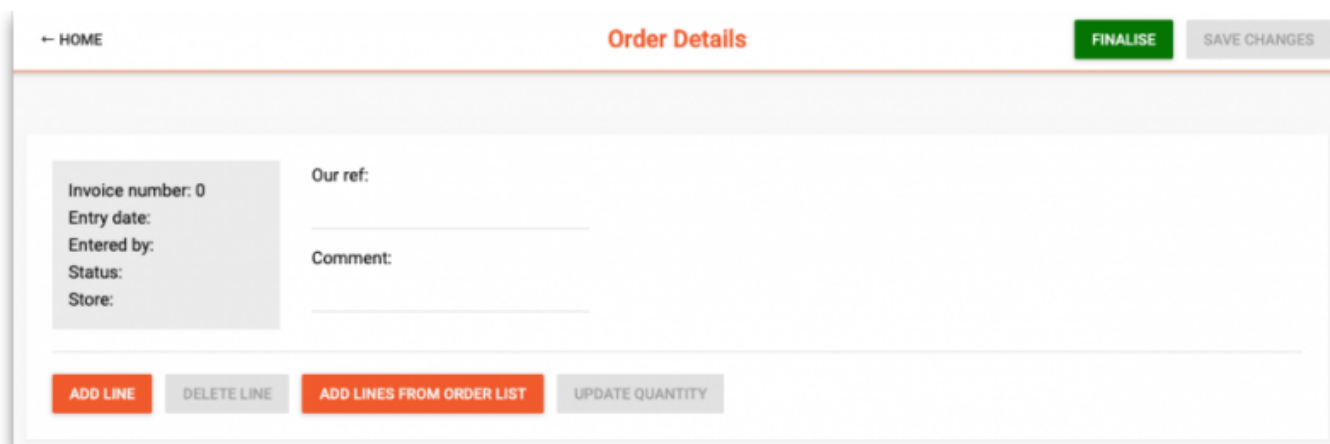
Status wf indicates web interface orders that have been finalised by the customer. These can be

viewed, but not edited or deleted.

Click on **HOME** (top left) to return to the main options screen.

## Create orders

Click on **Create Order** to display the screen for entering an order:



The screenshot shows the 'Order Details' screen. At the top left is a back arrow and 'HOME'. The title 'Order Details' is in the center. At the top right are two buttons: 'FINALISE' (green) and 'SAVE CHANGES' (grey). Below the header is a form with two columns. The left column has a grey background and contains labels: 'Invoice number: 0', 'Entry date:', 'Entered by:', 'Status:', and 'Store:'. The right column has labels: 'Our ref:' and 'Comment:'. Below the form are four buttons: 'ADD LINE' (orange), 'DELETE LINE' (grey), 'ADD LINES FROM ORDER LIST' (orange), and 'UPDATE QUANTITY' (grey).

To add an item to the order, click the **Add line** button.

In the pop-up window clicking the **Item name** field will open a drop down list to select from



The screenshot shows the 'Add item' pop-up window. It has a title 'Add item'. Below the title is a label 'Item name' and a text input field. Below the input field is a list of items with a scrollbar on the right. The items are: 'Acetylsalicylic Acid 100mg tabs (1300)', 'Acetylsalicylic Acid 300mg tabs (5000)', 'Amoxicillin 250mg tabs (2257600)', 'Amoxicillin Dry Powder for Suspension 125mg/5ml Bot/100ml (420)', 'Artesunate Injection Ampoule/60 mg (5700)', and 'Bandage W.O.W. 15cm wide x 5m roll (4332)'.

Enter the quantity and click **Add to order** to proceed

### Add item

Item name

Acetylsalicylic Acid 100mg tabs (1300)

Quantity

CANCEL ADD TO ORDER

Repeat this to add further items to your order.

← HOME

Order Details

FINALISE

SAVE CHANGES

Invoice number: 0

Entry date:

Entered by:

Status:

Store:

Our ref:

Comment:

ADD LINE

DELETE LINE

ADD LINES FROM ORDER LIST

UPDATE QUANTITY

ITEM CODE	ITEM NAME	PACK SIZE	UNIT PRICE	PRICE EXTENSION	QUANTITY
030063	Acetylsalicylic Acid 100mg tabs	100	0	0	500

Information can be entered in the fields **Our ref** and **Comment**, but these are optional.

If you wish to continue working on the order later, click the **Save changes** button.

When you have completed the order, click on the **Finalise** button. This will submit the order to the supplying store in mSupply and no further changes will be possible. It will now be visible under the *Show Orders* option **until the supplying store processes it**. It is also visible and available for processing in mSupply at the supplying store.



A note for the mSupply user processing the order in the warehouse:

- The customer's order will appear in mSupply Desktop as a **Customer Invoice** with status of wf (web finalised). This means that while the customer can no



longer edit the order, the supplying store's desktop user can.

- The customer invoice displays the customer's order with placeholder lines by default. This gives the mSupply Desktop user control to choose the stock for the customer's order. To apply stock to the placeholder lines, refer to [Redistribute placeholder lines](#).
- When stock has been applied to the various lines, the invoice is processed in the normal way (refer [Issuing goods to a customer \(customer invoices\)](#)) to create the picking list and dispatch note as required before the goods are dispatched to the customer.

## Using an order list

If you have been assigned an Order List of the items you are allowed to order, this can be used when you are creating an order. Clicking the **Add lines from Order list** button will display the items on the list(s) defined for the customer logged in.



For setting up a default order list, see [Names: Using, adding and editing](#)

The list will be displayed with the items in the same order as was specified when setting up the list in mSupply.

[\(Back up to The navigator\)](#)

## Search items

Click **Search Items** to make a search of items available in the supplying store. It will display this screen:

Choose your search options using the selectors and enter something to search for in the textbox (or leave it empty to list all the items). Click on **Search** and the search will be made. When the search is complete the list of items matching your search criteria will be displayed:

← HOME

Search for items

ITEM DETAILS

Find items where

Item Name

Starts with

Search

amox

Select Category

Any

SEARCH

CODE	ITEM NAME	STOCK ON HAND
228264011	Amoxicillin 250MG (Amoxil)	0
172741470	Amoxicillin 500MG (Amoxil)	180
172741142	Amoxicillin 875MG (Amoxil)	0
00143988901	Amoxicillin 250mg/5ml (100ml) suspension	0

Click the row of a specific item and click on **Item details** to see the details:

← HOME

Search for items

ITEM DETAILS

Find items where

Item Name

Starts with

Search

amox

Select Category

Any

SEARCH

CODE	ITEM NAME	STOCK ON HAND
228264011	Amoxicillin	0
172741470	Amoxicillin	180
172741142	Amoxicillin	0
00143988901	Amoxicillin	0
55045299202	Amoxicillin	0
0143998201	Amoxicillin	0

Item code: 172741470  
Item name: Amoxicillin 500MG (Amoxil)  
Total stock on hand: 180  
Category:  
Department: Antibiotics  
Description:

PACK SIZE	AVAILABLE	BATCH	EXPIRY	SELL PRICE
1	78		0000-00-00	5.88
1	102		0000-00-00	5.88

CLOSE

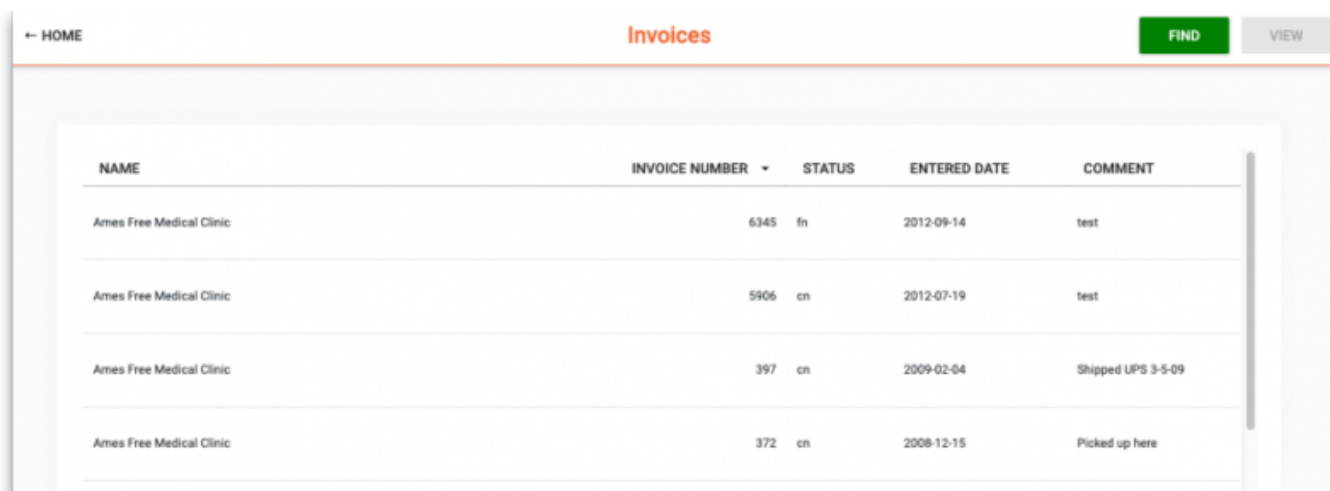


Note: The *Stock on Hand* figure is the **supplying store's** stock on hand, not the **Customer's** stock on Hand.

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## Show invoices

Select **Show Invoices** to display a list of invoices that have been created in the supplying store for you:



NAME	INVOICE NUMBER	STATUS	ENTERED DATE	COMMENT
Ames Free Medical Clinic	6345	fn	2012-09-14	test
Ames Free Medical Clinic	5906	cn	2012-07-19	test
Ames Free Medical Clinic	397	cn	2009-02-04	Shipped UPS 3-5-09
Ames Free Medical Clinic	372	cn	2008-12-15	Picked up here

### Columns

#### Name

The Name of the customer. If this isn't the customer's name, then there is a problem - contact [support@msupply.org.nz](mailto:support@msupply.org.nz)

#### Invoice Number

The Invoice Number as recorded in the supplying store

#### Status

The Status indicates at what stage each invoice is in processing:

- sg (suggested): The supplier has started to process it, but is not finished.
- cn (confirmed): The supplier has completed processing the order but has likely not yet dispatched it.
- fn (finalized): The supplier has likely dispatched the order and the stock should be on its way to you.



Depending on the configuration of mSupply, it is possible to dispatch an order without actually finalizing it. So you may find yourself receiving an order that hasn't actually been finalized.

## Entered Date

Date that the invoice was first entered in the supplying store.

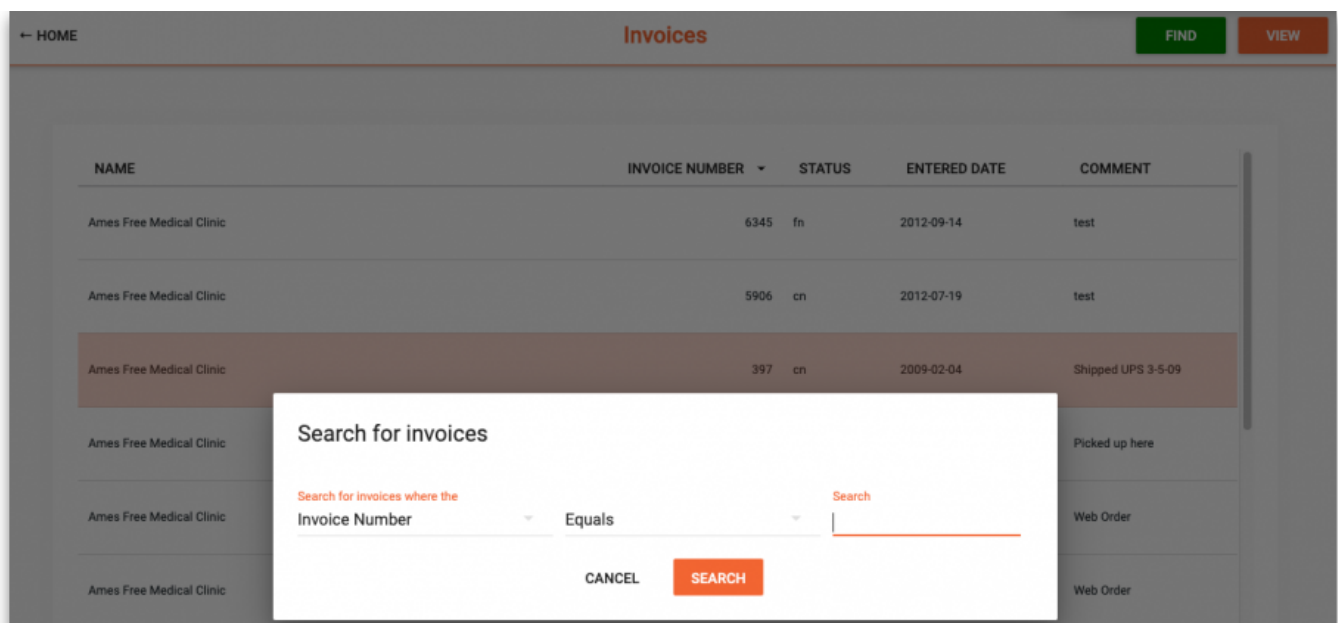
## Comment

Comment added by the supplying store

## Find invoices

To find a particular invoice:

1. Click on the **FIND** button at the top right
2. Fill in the details in the search options provided
3. Click on the **SEARCH** button



## View invoice details

To view details of an invoice:

1. Click the row of a specific invoice
2. Click on the **VIEW** button at the top right



← HOME **Invoices** FIND VIEW

NAME	INVOICE NUMBER	STATUS	ENTERED DATE	COMMENT
Ames Free Medical Clinic	6345	fn	2012-09-14	test
Ames Free Medical Clinic	5906	cn	2012-07-19	test
Ames Free Medical Clinic				Shipped UPS 3-5-09
Ames Free Medical Clinic				Picked up here
Ames Free Medical Clinic				Web Order
Ames Free Medical Clinic				Web Order
Ames Free Medical Clinic				This is not a bill amount due

Invoice number: 6345  
Entry date: 2012-09-14  
Entered by: Christian  
Status: fn  
Store: General  
Name: Ames Free Medical Clinic  
Their ref:  
Comment: test  
Confirm date: 2012-09-14

ITEM CODE	ITEM NAME	QUANTITY
71015523	Lipitor 10MG (Atorvastatin)	30

CLOSE

(Back up to The navigator)

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