

# Mobile Customer Interface

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## What is it?

The mSupply Mobile Customer Interface allows staff of Customers of your mSupply system to report their stock levels and order stock from a [Virtual store](#) in your mSupply system from browsers on any mobile devices (smartphones, tablets, net-books, etc.).



While smaller screen devices will function, it is generally impractical to use devices smaller than a tablet.

Also included in this section is a description of what actions are taken by mSupply Desktop Users in response to orders coming through the mSupply Mobile Customer Interface.

## Features and Limitations

mSupply Mobile Customer is designed to be used by staff of your Customer, that is, personnel outside of your organisation. For this reason, mSupply Mobile Customer will only access / update a restricted set of data in your Server.

mSupply Mobile Customer's features are:

- **(Supplier) Invoices:** Display a list of Supplier Invoices (Processed and In-Process) and details of any selected Supplier Invoice. Invoices that have been finalised cannot be edited. Supplier Invoices cannot be deleted.
- **Orders:** Display a list of Orders placed with the supplying store. Orders can be created, deleted and edited (lines can be added, deleted or edited).
- **Items:** Display a list of Items and simplified details of any selected Item Line, including, of course, stock on hand. Inventory adjustments are carried out through a stocktake process - refer below.
- **Stocktakes:** Display a list of Stocktakes (incl. Imprests) and details of any selected Stocktake. Stocktakes can be added, deleted and edited (lines can be added, deleted and edited).



Batch number and expiry date are **not** displayed, selectable or editable in mSupply Mobile Customer. Once Stock leaves the mSupply system to a Customer, mSupply stops keeping track of these details.

## Connecting to mSupply Mobile Customer

Once the mSupply web server is running, you can access it by typing [http://ip\\_address\\_of\\_machine\\_running\\_msupply/customer/](http://ip_address_of_machine_running_msupply/customer/)



The hyperlink above links to Sustainable Solutions' mSupply Web Server for mSupply Mobile Customer demonstration. You will not be able to proceed further without a username and password - see below. Contact us email:[info@msupply.org.nz](mailto:info@msupply.org.nz) if you would like a temporary username and password to try it out.

Once set up with your own Web Server, the correct link can be bookmarked to save you typing it each time.

### mSupply Mobile Customer login

Firstly you will be shown the mSupply login page.

A screenshot of the mSupply Mobile Customer login page. The page has a blue header bar with the word "Login" in white text on the left and a blue "Login" button on the right. Below the header is a section titled "Login Details" in blue text. This section contains two input fields: "Username:" with a placeholder "Enter your username" and "Password:" with a placeholder "Enter your password". Both fields have a light gray border and a small blue icon on the left. The background of the page is a light gray gradient.

Enter your user name and password and tap **Login**

### The Navigator

You are now shown the mSupply mobile customer options:



Tap on:

- [Show Processed Invoices](#) to see invoices from the supplying store that have already been processed.
- [Show In-Process Invoices](#) to see invoices from the supplying store that have not finished being processed.
- [Show Items](#) to see information on items invoiced from the supplying store.
- [Show Orders](#) to view a list of orders that have been created.
- [Create Orders](#) to create a new order for stock from the supplying store.
- [Show Stocktakes](#) to view and create stocktakes or imprests.

## Show Processed Invoices

Tap *Show Processed Invoices* and the invoices that have already been confirmed will be displayed:

Invoices					Find	View
Name	Invoice number	Status	Entered date	Comment		
Rando Hospital	16940	cn	13/10/2013	Invoice from customer stock history		
Rando Hospital	16499	cn	02/09/2013	chronic patient order		
Rando Hospital	16485	cn	30/08/2013	Invoice from customer stock history		
Rando Hospital	16003	cn	04/07/2013	Invoice from customer stock history		
Rando Hospital	15544	cn	29/05/2013	SUPPLEMENTARY ORDER		
Rando Hospital	15341	cn	06/05/2013	Invoice from customer stock history		
Rando Hospital	15069	cn	18/03/2013	long term patient order		
Rando Hospital	15006	cn	08/03/2013	Invoice from customer stock history		
Rando Hospital	14778	cn	18/01/2013	Invoice from customer stock history		
Rando Hospital	14473	cn	14/01/2013	supplementary order		
Rando Hospital	14627	cn	30/11/2012	Invoice from customer stock history		
Rando Hospital	14373	cn	12/10/2012	supplementary order		
Rando Hospital	14233	cn	13/09/2012	Invoice from customer stock history		
Rando Hospital	14159	cn	29/08/2012	supplementary order		

Tap *Find* to show a screen where you can search for a particular invoice:

Invoice List
Search for invoices
Find Invoices

Search for invoices where the

Invoice number equals

## View Invoice details

If you tap on a particular row, then tap **View** you will be shown the details of that invoice:

Invoice no: 16940  
Entry date: 13/10/2013  
Entered by: PO'OMUC  
Status: cn  
Store: National Medical Store  
  
Name: Rando Hospital  
Their ref:  
Comment:  
Confirm Date: 16/10/2013

Item Code	Item Name	Available stock	Quantity
3015	BANDAGE, ELASTIC ADHESIVE PLASTER 7.5CM	7261	12
42	AMOXYCILLIN TABS/CAPS 250MG	5851100	4000
2030	ANTISEPTIC SOAP	53	6
4210	BAG, PLASTIC, DISPENSING, 75MM X100MM /1000	1609000	2000
3011	BANDAGE, CREPE 7.5CM	37135	24
3017	BANDAGE, GAUZE 5CM X 5M	242	10
1670	BENZATHINE PENICILLIN 1.2MEGA IU DP (0.9G)	61383	100
4635	BLADE, SCALPEL SIZE 10 BOX/100	393	2
4636	BLADE, SCALPEL SIZE 11 BOX 50/100	1259	2
4143	CANNULA, INTRAVENOUS 20G PINK	14695	20
4139	CANNULA, INTRAVENOUS 24G YELLOW	1085	20

Tap **Home** to go back to the home screen.

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

## Show In Process invoices

Choosing this option will display the list of invoices that have not been confirmed or finalised. The invoices displayed have their status of suggested(sg).

Invoices					Find	View
Name	Invoice number	Status	Entered date	Comment		
Rando Hospital	16940	cn	13/10/2013	Invoice from customer stock history		
Rando Hospital	16499	cn	02/09/2013	chronic patient order		
Rando Hospital	16485	cn	30/08/2013	Invoice from customer stock history		
Rando Hospital	16003	cn	04/07/2013	Invoice from customer stock history		
Rando Hospital	15544	cn	29/05/2013	SUPPLEMENTARY ORDER		
Rando Hospital	15341	cn	06/05/2013	Invoice from customer stock history		
Rando Hospital	15069	cn	18/03/2013	long term patient order		
Rando Hospital	15006	cn	08/03/2013	Invoice from customer stock history		
Rando Hospital	14778	cn	18/01/2013	Invoice from customer stock history		
Rando Hospital	14473	cn	14/01/2013	supplementary order		
Rando Hospital	14627	cn	30/11/2012	Invoice from customer stock history		
Rando Hospital	14373	cn	12/10/2012	supplementary order		
Rando Hospital	14233	cn	13/09/2012	Invoice from customer stock history		
Rando Hospital	14159	cn	29/08/2012	supplementary order		

## View Invoice details

To view item details, refer to [View Invoice details](#)

Tap **Home** to go back to the home screen.

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## Show Items

Tap “Show Items” to make a search of invoices on the basis of items. It will display the window as shown below.

Navigator

Search for items

Search

Find the items where the

Item name

starts with

and

item category is

Any

Enter the name of the item which you want to search or leave it empty to list all the items. Click Find button.

Items list			Item details
Item Name	Code	Stock on hand	
Amalgam	51_8033	7950	
Amalgam carrier	51_8058	0	
Ambroxol syrup	05_1111	0	
Amidarone (Cardone) Injection 150 mg/ml Amp/1ml	04_0150	0	
Amino Acids with Carbohydrates & Electrolytes (HEPAR) 5%	04_0000	50	
Aminoleban solution	04_8546	0	
Aminophylline 250mg tabs	03_0000	0	
Aminophylline Injection 25mg/ml Amp/10ml	04_0307	5910	
Amiodarone HCL 100mg tabs	03_0330	21150	
Amitriptyline HCL 25mg tabs	03_0400	3000	
Amlodipine 10mg tabs	03_0001	12500	
Amlodipine 5mg tabs	03_0430	32450	

1 - 21 of 21 results

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By tapping the row of a specific item details are shown..

Items list

Items details

Item code: 03\_0330  
Item name: Amiodarone HCL 100mg tabs  
Total stock on hand: 21150  
Category: GENERAL-SAMES  
Department: MEDICINE  
Full Description: ON SUPPLEMENTARY ED LIST  
Default Price: 0

Pack size	Available	Batch	Expiry	Sell Price
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## Show Orders

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

← HOME

Show Orders

DELETE VIEW/EDIT

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, tap on the order's row to highlight it, then tap on **View/Edit order**

To delete an existing order, tap on the order's row to highlight it, then tap on **Delete order**

Tap on **Navigator** to return to the navigator screen.

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## Create Orders

Tap on "Create Order" to display a screen for entering 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

To add a new line, tap on **New line** and enter the item and the quantity to add:

Add item

Item name

Quantity

CANCEL

ADD TO ORDER

Tap on **Add to order** to proceed and return to the items in this order. If you wish to add a comment you can do so directly in the list by clicking the blank row under each item:



Our ref:

Comment:

Add line +   Add lines from order list   Delete line -

Item Code	Item Name	Pack size	Unit price	Price extension	Quantity
03_0452	Amoxicillin 500mg tabs				1000

Comment:

Note you can also edit the quantity directly in the list.

If you have been assigned an order list of the items you are allowed to order, tapping the **Add lines from Order list** button will display the items on the list(s) defined for the group(s). <note important>For setting up a default order list, see [Names: Using, adding and editing](#) </note>

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

Once the order is complete, tap the **Finalise Order** button to finalise the order that you have created. It will now be able to be processed, and you might even get your supplies delivered quicker

than you would have by submitting a written order 😊

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## Show Stocktakes

The stocktakes feature is useful to those users at a central supply facility who are responsible for managing orders from a number of remote facilities based on the stock levels in those facilities.

You are shown a list of stocktakes you have entered.

From this window you can view an existing stocktake by tapping on a row and then on the **View/Edit** button. You can choose to create a **New stocktake** or **New imprest** by clicking the appropriate button. The option chosen depends on whether you are using the dynamic Stock History system of stock management, or the Imprest system. These systems are covered elsewhere in the user guide. See [Stock Control methods for your customers](#).

**Stocktakes** [Delete] [View/Edit]

Show: **Current**

[+ New stocktake] [+ New Imprest]

Number	Type	Created date	Stocktake date	Status
Sorry, no stocktakes match your selection				

By clicking either of the **New stocktake** or **New imprest** buttons you are presented with a screen showing the items you carry in stock.

Enter the stock on hand for each item into the **My current SOH** column:

**Stocktakes** **Stocktake** [Finalise] [Save changes]

Stocktake ID: 38  
Created date: 31/08/2014  
Status: wp

Stocktake Date: **Aug** **31** **2014**

[Add line +] [Delete line -]

Item code	Item name	My Current SOH
03_0050	Acetazolamide 250mg tabs	1500
03_0061	Acetylsalicylic Acid double scored 500mg tabs	200
03_0070	Acyclovir 200mg tabs	10
06_0078	Acyclovir Ophthalmic Ointment 3% Tube/4.5gm	5
04_0084	Adrenaline HCL (Epinephrine) Injection 1mg/ml Amp/1ml	0
03_0200	Albendazole scored 400mg tabs	0
03_0220	Allopurinol 100mg tabs	0
03_0280	Aluminium Hydroxide 500mg tabs	0
04_0307	Aminophylline Injection 25mg/ml Amp/10ml	0

Once you have entered all your stock on hand figures, tap **Finalise** to send the stocktake to the central store.

If you want to finish the entries later, click **Save changes** and then **Stocktakes** to return to the list. You can then use the **View/Edit** Button on the stocktakes list to return to your stocktake later.

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## Back at the central store....

The operator at the central store may then process the information entered by the remote customer by choosing from the menu *Customer>Show customer stock history*, and looking in the *Customer stock history list* window for recent entries having a status of *wf* (web, finalised). Double clicking on the desired entry displays the *Edit customer stock history* window showing the data entered by the remote customer. The details may be reviewed, and figures entered in the *Actual quantity* column before clicking on *Create Customer Invoice*, at which point the status changes from **WF** to **sg** and it may no longer be viewed by the remote customer.

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