Updated: Version 4.02

NeedsUpdate

6.04. Ordering from one store to another

If you run mSupply using virtual stores then you can place an order for goods with another store within mSupply.

There are two ways you can do this:

- Create Purchase Orders. This method was the 'original' method, and is not recommended. In fact, from mSupply v7.0 this method has been removed.
- The recommended (since mSupply v4.01) method is Internal Orders.



Internal orders are the desktop equivalent of supplier requisitions in mSupply mobile.

Internal Orders are a simpler and easier way to place orders to another store if you've already been using purchase orders and goods received records in your workflow:

- 1. In the requesting store:
 - 1. Create an Internal Order to the supplying store.
 - 2. When the internal order is finalised, a response requisition is automatically created in the supplying store
- 2. In the supplying store:
 - 1. One or more customer invoices can be created from a single response requisition
 - 2. When each customer invoice is finalised, a supplier invoice is automatically created in the requesting store

Internal Orders

Internal Orders are also known as supplier requisitions or request requisitions.

Entering an internal order

To begin the process, choose *Supplier* > *Show internal orders* or click on the *Internal orders* icon on the *Suppliers* tab of the Navigator:

Last update: 2024/07/30 purchasing:ordering_from_one_store_to_another https://docs.msupply.org.nz/purchasing:ordering_from_one_store_to_another 16:07



The following window will open, showing you a list of all existing internal orders:

• •	•			Inte	rnal order list	
N	ew internal order	Delete				Show Past 30 days
ID	Name 6 Central Medical Store		Date entered 30/07/2024	Order date 30/07/2024	Status sg	Comment
F			_			
F						
E						
F						
Double	click on row to edit details					ок

- **Show** drop down list: Set top *Past 30 days* by default, which will display all internal orders created in the last 30 days. You can select other options ot display All of them or those created in certain time periods or with certain statuses.
- **Type here to search** field: If the list of requisitions is long you can type something in this field to display only requisitions in the list with a supplier name, comment, program or requisition number which contain what you have typed.

Either double-click on an existing order to edit it, or click the **New internal order** button to create a new one.

If you have activated programs in mSupply see the Programs heading below

The example below has a few lines already entered:

📩 🔄 🛄 Entered by: Admin	Name Order date	Central Medical Stores (18/10/18	CMS		Referen Comme	ce jref nt fregular	order			Black	ID: 13852 Status: sg
Li. Item code Item name Unit NC0071 Amoxycillin 250mg tabs ea 43,962 17,651 2 8,993 9,000 2 NC0082 Paracetamol 500mg tabs ea 43,962 17,651 2 8,993 9,000 3 M70060 Durycycine 100mg tab ea 43,962 17,651 2 8,993 9,000 3 M00 100 3 M70060 Bandage 15om x 5m ea 375 117 3 0 5 ND0000 Rabies vacine ea 375 117 3 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	New line Ad		Filter iten	112	hreshold M	os p	Hide sto	ick over thres	nold 🗌		Entry date : 18/10/18
1 NC0071 Amovgalilin 250mg tabs ea 43,962 17,651 2 8,993 9,000 2 NC0082 Paracetamol 500mg tabs ea 27,328 9,389 2 841 1,000 3 NF0060 Dunycycine 100mg tab ea 1,200 309 3 0 100 4 NM0100 Bandage 15cm x 5m ea 375 117 3 0 50 5 ND0050 Rabies vacine ea 32 8 0 0 6 6 NF0059 Vitamin A 100,000 I.U. caps ea 14 0 28 0 0	vi unteresse	Item name	Unit	stock on	monthly		Calculated quantity	requested		Comment	
2 N20082 Paracetamol 500mg tabs ea 27,328 9,389 2 841 1,000 3 NP0060 Durycycline 100mg tab ea 1,200 309 3 0 100 4 NP0100 Bandage 15cm x 5m ea 375 117 3 0 50 5 ND0050 Rables vaccine ea 375 117 3 0 50 6 NF0050 Vitamin A 100,000 LU, caps ea 14 0 28 0 0	1 NC0071	Amowcillin 250mg tabs	ea		17.651	2	8.993	9.000			
3 NF0060 Donycycline 100mg tab ea 1,200 309 3 0 100 4 MP0100 Bandage 15cm x 5m ea 375 117 3 0 50 5 ND0080 Rables vaccine ea 32 8 3 0 0 6 NF0050 Vitamin A 100,000 I.U. caps ea 14 0 28 0 0						2					
4 NP0100 Bandage 15cm x 5m ea 375 117 3 0 50 5 ND0080 Rables vaccine ea 32 8 3 0 0 6 NP0050 Vitamin A 100,000 I.U. caps ea 14 0 28 0 0						3					
S ND0080 Rables vaccine ea 32 8 3 0 0 6 NP0050 Vitamin A 100,000 I.U. caps ea 14 0 28 0 0						3					
6 NF0050 Vitamin A 100,000 I.U. caps ea 14 0 28 0 0	5 ND0080		ea			3	0				
	and the second se										
	7 NC0010	ORS sachet (1 litre)	ea	5,740	1,124	5	0	500			
											3

- The *Name* will default to the supplying store for the current store, but any other *visible* store in the data file can be selected in the usual way (i.e. enter the first few characters and hit the *Tab* key to find matches).
- The Order date defaults to the current date. You can change it.
- Use either the **New line** button to manually add a single item, or **Add from master list** to add any items in the current store's master list which are not there already.
 - If adding from a master list, the cursor will go into the first new item's *User requested quantity* cell.
 - If adding a single item, the cursor will go into the *User requested quantity* cell for that item when it has been added. When you click on the **New line** button, this window opens:

Item	Search item		
User requested	0		
Comment			

• **Item:** Type the first few characters of the item's name and press the *Tab* key on the keyboard to select the item from a list of items whose name or code begins with

what you typed.

- **User requested:** The quantity of units of the item the customer is requesting.
- **Comment:** Any comment you want the supplier to see for this item.
- Click on the OK button to add the line to the requisition, click the OK & Next button to add this line and empty the window so you can add another item right away or click the Cancel button to close the window without adding the current item to the requisition.
- For each item,
 - mSupply already knows Our stock on hand
 - mSupply calculates the Average monthly consumption based on what the store has issued over the last 12 months (or less if the store hasn't been operating that long).
 - mSupply calculates the Months of stock from Our current stock on hand and the Average monthly consumption (this is therefore the months of stock at the current rate of consumption).
 - The Calculated quantity is then worked out by multiplying the Average monthly consumption by the Max MOS (maximum months of stock), and then subtracting Our stock on hand. If the resulting value is negative, a value of will be displayed.
- If the Use consumption and stock from customers for internal orders store preference is turned on (see 25.08. Virtual stores, preferences for details) then the *Our current stock on hand* figure comes from the sum of all stock currently held by all the customers of this store and the stock consumed is taken as the stock issued to all customers. Note that customer stores are those that have this store set as their supplying store.
- The Max MOS is critical to this calculation, and you can change it.
 - There is an industry rule of thumb that the *Max MOS* should be set to 3 times the ordering cycle.
 - The default *Max MOS* is 3.0, which is based on an a monthly ordering cycle.
 - $\circ\,$ If, for example the ordering cycle was every two months, then Max MOS should be set to 3 x 2 = 6.0.
- Hitting the *Tab* key will move the cursor into the *Comment* cell and, if there's another line below, hitting *Tab* again will move the cursor into the next *User requested quantity* cell.
- If necessary, use the **Delete line(s)** button to remove selected item lines.

	Central Medical Stores	CMS		Referen					Mark Black	ID: 13852 Status: sg
	ita 70/18	Filter iten	÷.	Comme Max MC hreshold MC	os 4		ick over thre	shold <table-cell></table-cell>	Print	Type : request Entry date : 18/10/18 Entered by : Admin Store: OD Test Store
uta entry Log	Item name	Unit	Our stock on hand	Average monthly consump	Months of stock	Calculated quantity	User requested quantity		Comment	
1 NCD071	Amoxycillin 250mg tabs	ea	43,962	17,651	2	26,645	26,645			
2 NC0082	Paracetamol 500mg tabs	40	27,328	9,389	2					
3 NF0060	Doxycycline 100mg tab	44	1,200	309	3					
4 NF0100	Bandage 15cm x 5m	65	375	117	3	96	96			
5 ND0080	Rables vaccine		32	8	3	. 0	0			
e Sort order								Finalise	Cancel	K & Next OK

If the order has a lot of item lines, you can filter them by typing into the *Filter items* field, which will change to display the number of visible items out of the total number in the order:

Name Order date	Central Medical Stores	CMS			nt Fregular	order			Bank Black	ID: 13852 Status: sg
•	•		201.M	Max Mi hreshold Mi		Hide sto	ck over three	shold 🗌	=	Type: request Entry date: 18/10/18 Entered by: Admin
New line A	dd from master list - Delete line(s)	Fitter iten	s (nd						Print	Store: CD Test Store
Li Item code	item name	Unit	Our stock on hand	Average monthly consump	Months of stock	Calculated quantity	User requested quantity		Comment	
1 NC0071	Amoxycillin 250mg tabs	ea	43,962		2		9,000			
2 NC0082 7 NC0010	Paracetamol 500mg tabs ORS sachet (1 litre)	63 64	27,328 5,740		2		1,000			
e Sort order								Finalise	Cancel D	K & Next OK

Note that, while a filter is active, some of the other buttons are disabled e.g. you can't save the sort order unless all lines are visible.

You can also filter item lines which have a lot of stock (and therefore don't need to be ordered) by entering a value in the *Threshold MOS* field. This will automatically tick the *Hide stock over threshold* checkbox, and hide any lines which have their *Months of stock* greater than or equal to *Threshold MOS*.

Order date	Central Medical Stores 18/10/18	CMS		Referen Comme Max M0	nt regular	order		Black	10 : 13852 Status : 1g Type : request
	id from master list Delete line(s)	Filter iten		hreshold M	75 4	Hide sto	ck over thre		Entry date : 18/10/18 Entered by : Admin int Store: OD Test Store
uta entry Log Li Item code	Rem name	Unit	Our stock on hand	Average monthly consump	Months of stock	Calculated quantity	User requested quantity	Commeri	0
1 NC0071	Amorycillin 250mg tabs		43,962	17,651	2	8,993	8,993		
2 NC0082	Paracetamol 500mg tabs	63	27,328	9,309	2	841	841		
3 NF0060	Daxycycline 100mg tab	ea	1,200	309	3		0		
4 NF0100	Bandage 15cm x 5m	ea	375	117	3	0	0		
5 ND0080	Rabies vaccine	ea	32	В	3	0	0		
				-					
C									2

Once you are satisfied, tick the *Finalise* checkbox. This will prevent further editing, and automatically delete any lines which have a requested quantity of zero.

Order date	Central Medical Stores 58/10/18 dd from master list Delete line(s)	CMS Filter Res		Referen Comme Max Mi hreshold Mi	os 4 os 4) ick over three	hold 2	
ata entry log Li Item code	Bem name	Unit	Our stock on hand	Average monthly consump	Months of stock	Calculated guantity	User requested quantity	Comment	
1 NC0071	Amonycillin 290mg tabs	ea	43,962	17,651	2	26,645	26,645		
2 NC0082	Paracetamol 500mg tabs	ea	27,328	9,389	2	10,230	10,230		
3 NF0060	Donycycline 100mg tab Bandage 15cm x 5m	ea 64	1,200 375	309 117	3		37 96		
¢									3

When the order is then saved, it will automatically generate a corresponding response requisition in the supplying store. From there, one or more customer invoices can be raised in the supplying store which, when finalised, appear as supplier invoices back in the requesting store in the same way as regular stock transfers.

Programs

See the 4.05. Programs page for information on setting up programs.

Using programs activates a comprehensive system for managing orders and supplies by program. When you click on the **New internal order button**, before the order window opens, another window appears to allow you to select the program and period etc. that the order belongs to:

	New internal order
Order type	
	Program O General O
Order details	
Program	CONSOMMABLES DE SERVI
Requisition type	Commande Urgente ou Exc
Supplier	
Period	17 SEPT /23 OCT. 2019
	Start date 17/9/19
	End date 23/10/19
	Cancel OK

- Order type: Selecting *General* will create a standard, non-program based requisition and none of the Order details section fields will apply. Selecting *Program* will create a program based requisition and you must fill in the details in the **Order details** section.
- Order details section
 - **Program:** The program this requisition belongs to. Select one of the programs you have defined and assigned to this store.
 - Requisition type: Select one of the types of order you have defined for this program. Normal orders will follow the quantification rules and be limited in the number of orders per period. Emergency orders will not follow quantification rules and will not be limited in the numbers of orders per period but will typically be limited in the numbers of lines that can be entered on them.
 - **Supplier:** The supplying store for this store will be selected by default. Other stores can be seleted if required.
 - Period: The period this requisition is for. Will contain a list of all the periods which are still available for you to enter a requisition for i.e. those for which you have not already entered the maximum number of requisitions. The *Start date* and *End date* fields show the dates of the start and end of the selected period.

When you click on the **OK** button on this window, the requisition is created for you. The items defined for the program are automatically added to it and the suggested order quantity is calculated for you following the quantification rules.

Note that items belonging to the program will only be added to the order if they are also visible in the supplying store. This is to avoid the situation where you request an item that they don't have visible to them and therefore can never have any stock to supply!

Purchase orders

• This method of ordering stock from another mSupply store is deprecated: Internal Orders

(above) is the way to do it.

• Purchase orders are used for Ordering stock from suppliers outside of mSupply

Using a purchase order to order from another store

For the most part, the process is the same as for creating a normal purchase order. There are, however, a few significant differences:

• In the *Name* field of the purchase order, enter the name of the **store** which will supply your goods.

The names of suppliers which are stores will appear in *RED* in the choice list of suppliers. If the name of the store you select as a supplier is *BLACK*, then you have not chosen another store as a supplier (you will be creating a standard purchase order not an internal requisition), and the instructions in the remainder of this section do not apply.

Note: From mSupply v7.0 this method of ordering from another store has been removed. Store names have been filtered out of the name selection so it is not possible to send an internal requisition to another store this way.

• The *Internal requisition* label will appear after the name to indicate that this is going to be an internal requisition.

2 . N	ew Purchas	e order									
	dernum : 424 firm date	Name Virtua	il store 2 ted delivery 18/04	11		VIR	2 In	ternal requ	St	Black atus sg tore Genera	
	•	Ad Hoc items Goods Re		4		=		Catego	xy none		_
	ewline Delete owall lines	lines Update EDD	Info Print	Purchase (order Co	onfirm	Curr	ency AUD	M For	ex rate	1
Li	ne Item code	Item	Orig.	lty Pack	Adi, Qiy	Tot. recei	Stock on	On Order	Cust.b/odrs	Price Ext	R(
<	1			111							>
¢	Percent	age 0 Dis	scount amount		000			ated cost af			0.000
	Locked	Auto calc	usage	inalize ord	er	Print long de	scription	Print m	y signature		
						0	OK & Next		Delete		ĸ

Enter the purchase order lines as normal and when you're finished, confirm the purchase order (at this point you may be prompted to enter budget and/or category information, depending on your preferences):

General Details Ad Hoc items Goods Received Supplier Invoices Log Location		
Update EDD Info Print Purchase Order	one 🗸	
show all lines 🕑 Currency AUD 😒	Forex rate 1	
Line Item code Item Orig.Qty Pack Adj.Qty Tot. recei Stock on On Order Cust.b.	/odrs Price Ext Requeste.	Store:
1 EFV600 Efavirenz tablet 600mg 20 1 20 0 0 60	0 0.00 18/04/201	1 General
2 Formraw Formaldehyde solution 20% 5L 150 5 150 0 1799 0	0 0.00 18/04/201	1 General
		3
Suppler discount	Estimated subtotal	0.000

Once confirmed, it will no longer be possible to:

- modify the purchase order lines, except for updating the expected data of delivery (EDD).
- delete the purchase order or any of its lines (mSupply will give you a warning if you try).

Processing the order (supplying store)

For versions of mSupply newer than v4.01, confirming the purchase order will create a response requisition in the supplying store (with your store's name in the *Name* field). This allows the supplying store to create multiple customer invoices to supply the order (and hence to better handle partially fulfilled orders). Once each customer invoice has been **finalised**, a goods received note for the purchase order will be created back in the store where you created the purchase order which started this whole process off (called the customer or receiving store).

Handling partially fulfilled orders

If you have unfilled lines on the customer invoice (i.e. red placeholder lines), when you finalise the customer invoice you will be asked if you want to create a new invoice with the unfilled lines. This new invoice retains the link to the purchase order that created the original customer invoice, and can be used to issue further goods to the customer.

Note that you can also create another invoice that is linked to the original purchase order at any time

by using the "Duplicate" button on the toolbar of the customer invoice list.

Receiving the goods (requesting store)

Now, back in your store, where you created the purchase order which started this whole process off, you can view the goods received record via the **Suppliers** tab on the Navigator or via the **File > Supplier > Show goods received** menu item (or via the **File > Supplier > Show purchase** orders > Goods received tab)

🔹 Edit Purchase order					
Order num : 424 N	Name Virtual stor	e 2	VIR2	Internal requisition	Black
Confirm date 18/04/2011	Requested de	sivery 18/04/2011			Status cn
General Details Ad Hoc items	s Goods Receive	d Supplier Invoices Log Loca	tion		Store General
Goods received ID	Status	Supplier reference	Entry date	Receive	
86	5 sg P0	number: 424	18/04/2	011	18/04/2011
🗶 Edit (goods receive				
and the second second	Supplier Mittua	store 2	_	Store:	ieneral 🔽
Recei	ived date 18/04		Purchase order :		eived ID: 865
	reference PO nu		Created by :		ntry date : 18/04/11
			Modified by :		Status : sg
	-	-	-		
Add from	n purchase order	Add an un-ordered item	Delete line	Check space	Print goods receipt
Line L	Location	Item name	Batch	Exp date Pack Siz	ze Quan
1		dehyde solution 20% 5L	5V380	Explana Park a	1 150
2	Efavire	enz tablet 600mg	ABC1234	01/01/2012	1 20
					_
<					_
					M
E Final	lze			OK & Next Delet	е ОК

Notice that on the goods received note the lines from the customer invoice will have been filled in automatically. Process the goods received note in the normal way and note that, as with all other goods received, the goods are not added to your store's stock and available for issue until the goods received note has been finalised and the resulting supplier invoice confirmed. Note that, from mSupply v3.85, the original purchase order lines will only be updated with the stock received when the goods received note has been finalised.

Previous: 6.03. Purchase order categories || Next: 6.05. Multi-store Purchase Orders

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

Permanent link:

https://docs.msupply.org.nz/purchasing:ordering_from_one_store_to_another



Last update: 2024/07/30 16:07