

7.06. Managing donors

What / who is a donor?

In mSupply, we have the idea of a 'name'. A name can be a customer, a supplier, a patient, ... or a donor.

A donor is normally the name that has either paid for, or somehow managed the supply of certain items.

A donor *can* also be a supplier and / or a manufacturer or they can be just a donor. mSupply allows for any combination of that.

The Donor feature was designed for the purposes of tracking and reporting on stock that has been funded by a donor. However, the feature can be used for more than just tracking donors. For example, In many countries that use mSupply, most medical supplies are supplied free-of-charge to the health facility by a government agency. But if the government agency has not supplied stock, the facility might decide to procure the stock 'privately'. The facility management will often want to keep track and report on this privately procured stock. The donor feature can be used for this purpose. The 'donor' name for this purpose might be called **Privately procured**.



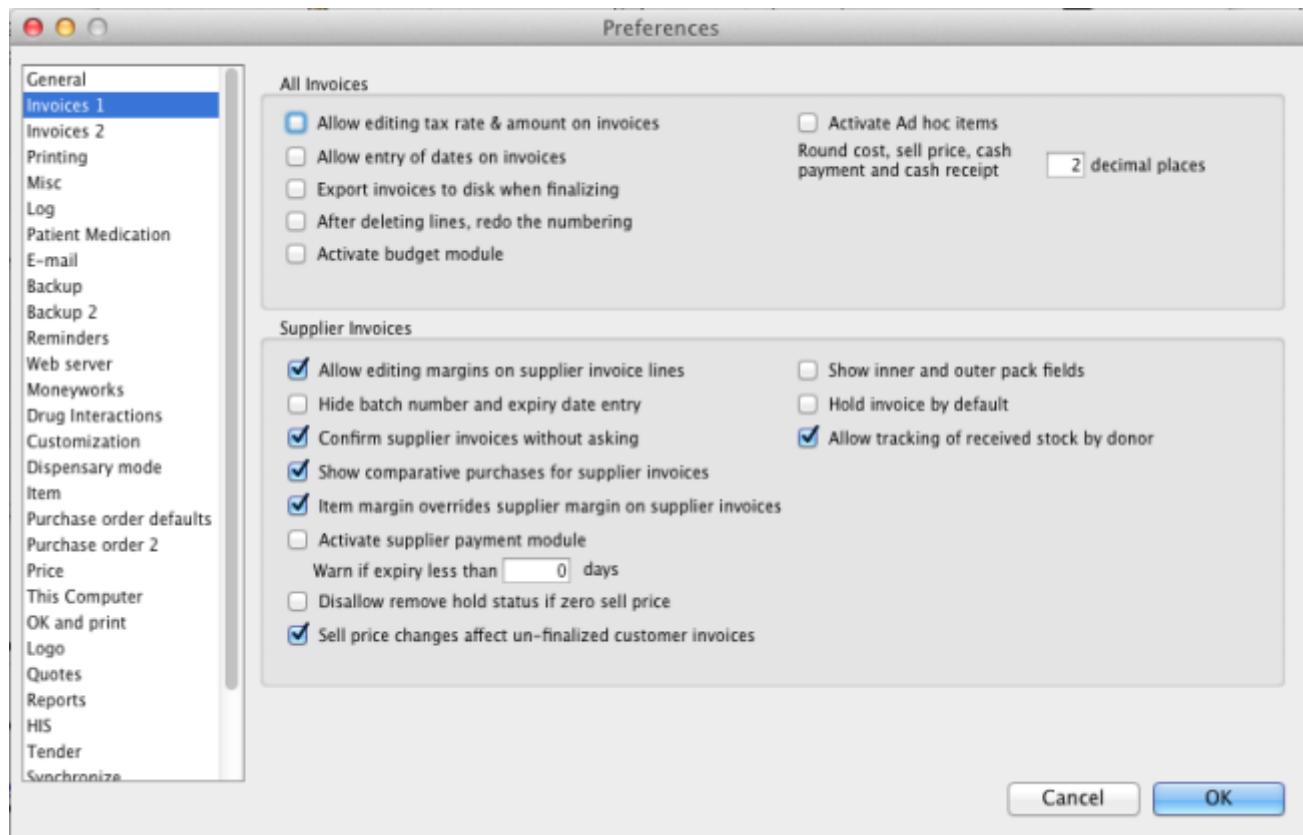
mSupply allows you to specify the donor for each incoming stock line independently of the supplier.

For example, GlobalFund might agree to supply certain malaria medicines, and then contract a supplier to deliver them to you. mSupply allows you to record this accurately, and to track and report on all the stock and transactions relating to those medicines donated by GlobalFund.

Using the donor module

To use the donor module, you must first turn it on:

- Click drop down menu **File>Preferences...**
- Click the **Invoice 1** tab in the left-hand list
- Check the box **Allow tracking of received stock by donor**

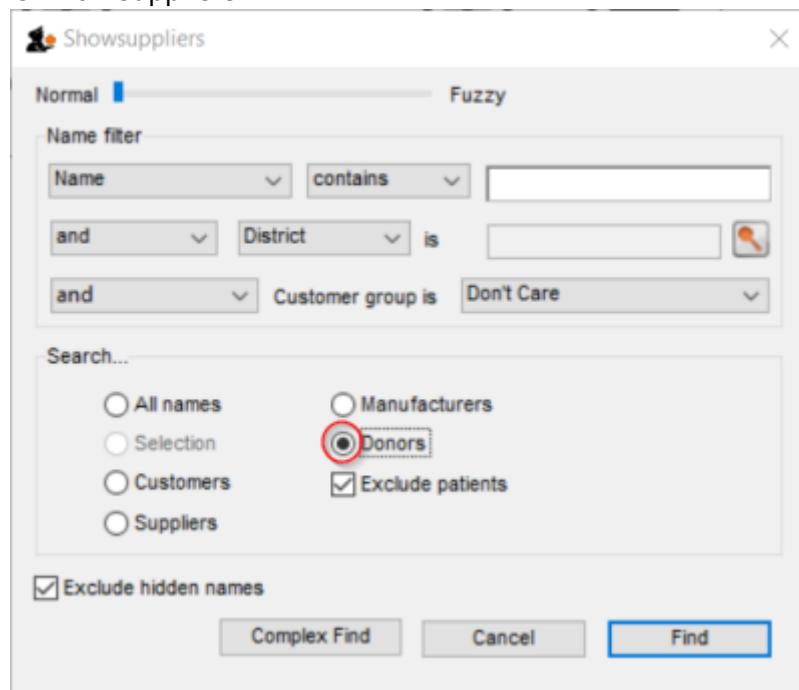


Once you have done this you can add donors and track stock by donor.

Adding or editing donors

To add or edit a donor you should first bring up the list of donors. Do this from the Navigator:

- Go to the **Suppliers** tab > **Show Suppliers** and check the box beside **Donors** so that the list shows donors rather than suppliers.



- Click **Find**. This will bring up a new window showing any donors that have been added to

mSupply in your system

- You can edit a donor by double-clicking on it.
- You can add donors using the **New** tool bar at the top of the window. This will bring up a window like this:

- Now add your donor details and click **OK**.

Track a donor in mSupply

Donors and the purchase order

- Create a Purchase Order in one of the usual ways - refer [Ordering Items From Suppliers](#).
- With donor tracking turned on, the Donor field will appear in the window - see below. The value you enter here will be tracked from this point on through to receipt, stock transfers and dispatch.

New Purchase order...

Order num : 3509	Name <input type="text"/>	Black <input type="checkbox"/>										
Confirm date <input type="text"/> 00/00/00	Donor <input type="text"/>	Reference <input type="text"/>										
Requested delivery: <input type="text"/> 02/03/2015	Status sg											
Store: Munda SLMS												
General Details Ad Hoc items Goods Received Supplier Invoices Log Location												
<input type="button"/> New line <input type="button"/> Delete <input type="button"/> Update EDD <input type="button"/> Info <input type="button"/> Print <input type="button"/> Confirm												
Category <input type="text"/> none <input type="button"/>												
show all lines <input type="button"/> Currency <input type="text"/> SBD <input type="button"/> Forex rate <input type="text"/> 1												
Line	Item code	Item	Orig Qty	Pack	Adj. Qty	Tot. recei...	Stock on ...	On Order	Cust.b/odrs	Price Ext	Expected...	Store:
<input type="button"/> < <input type="button"/> >												
Supplier discount <input type="checkbox"/> Percentage <input type="text"/> 0 <input type="text"/> Discount amount <input type="text"/> 0.00						Estimated subtotal <input type="text"/> 0.00 Estimated cost after discount <input type="text"/> 0.00						
<input type="checkbox"/> Locked <input type="checkbox"/> Auto calc usage			<input checked="" type="checkbox"/> Print long description <input type="checkbox"/> Print my signature			<input type="button"/> OK & Next <input type="button"/> Delete <input type="button"/> OK						
<input type="checkbox"/> Finalize order												

- In the **Donor** field type the first few characters of the donor name or code (or enter the wildcard character '@' in field) and press the **Tab** key on the keyboard. This opens the window below, showing the donor that match what you typed:

Choose name...

<input type="button"/> New	
Name	Code
Arch Foundation	arch
Double-click a name to choose it	
<input type="button"/> Cancel <input type="button"/> Use	

- If your donor does not exist, you can add it at this point by clicking on the **New** button - see [Adding or Editing Donors](#) above.
- Once you have selected your donor, click on the **OK** button and the donor's name will appear in the **Donor** field:

New Purchase order...

Order num : 87	Name: Central Medical Store	CMS	Black									
Confirm date: 22/05/2013	Default donor: Arch Foundation	Reference: [redacted]	Status: cn									
Requested delivery: 22/05/2013	Store: General											
<table border="1"> <tr> <td>General</td> <td>Details</td> <td>Ad Hoc items</td> <td>Goods Received</td> <td>Supplier Invoices</td> <td>Log</td> <td>Location</td> </tr> </table>				General	Details	Ad Hoc items	Goods Received	Supplier Invoices	Log	Location		
General	Details	Ad Hoc items	Goods Received	Supplier Invoices	Log	Location						
<input type="button" value="New line"/> <input type="button" value="Delete lines"/> <input type="button" value="Update EDD"/> <input type="button" value="Info"/> <input type="button" value="Print"/> <input type="button" value="Confirm"/>	Category: none											
<input type="button" value="show all lines"/>				Currency: VUV	Forex rate: 1							
Line	Item code	Item	Orig.Qty	Pack	Adj. Qty	Tot. rece...	Stock on...	On Order	Cust.b/o...	Price Ext	Requeste...	Store:
1	40	AMOXYCILLIN 250mg TAB/CAP	1000000	10	1000000	0	286600	0	0	178,000.000		General
Supplier discount												
<input type="button" value="S"/>		Percentage: 0	Discount amount: 0.0000				Estimated subtotal: 178,000.0000					
<input type="checkbox"/> Locked		<input type="checkbox"/> Auto calc usage		<input type="checkbox"/> Print long description			<input type="checkbox"/> Print my signature					
<input type="checkbox"/> Finalize order		<input type="checkbox"/> Authorise		<input type="button" value="OK & Next"/>			<input type="button" value="Delete"/>			<input type="button" value="OK"/>		

- Add your Item line(s), check your order is correct and click the **Confirm** button to make the order available for Goods Receipt in the normal way - see [Ordering Items From Suppliers](#) for more details.

Donors and the goods receipt function

Receive goods in the usual way - see [Receiving goods \(Goods Receipt function\)](#). The only difference is that the Donor's name is now present in the Donor field:

Donors and the supplier invoice

- Clicking **Finalise** on the Goods Receipt generates the Supplier Invoice in the usual way (see [Receiving Goods - a Supplier Invoice](#)). Note that you can see the donor identified in the Purchase Order in the **Default donor** field:

Default donor for each stock line

- Each stock line on a Supplier Invoice will inherit the **Default donor** from the Supplier Invoice.
- The **Default donor** can be edited.

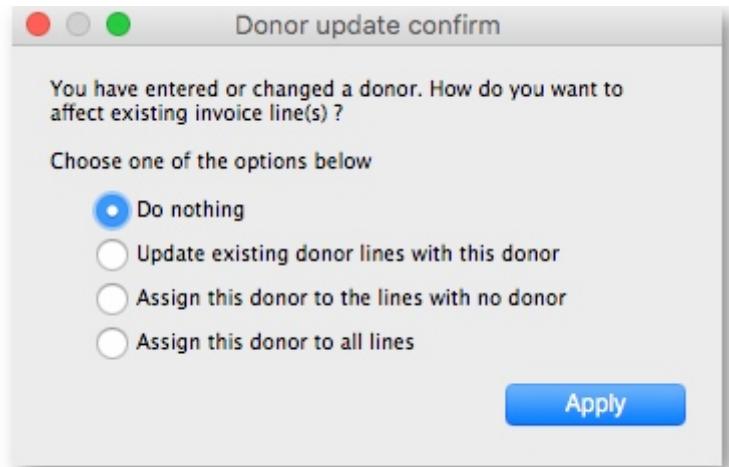
Changing the donor for a particular supplier invoice line

- There may be circumstances when delivered stock may be from a mix of donated and non-donated, or from different donors. You can change the donor for any stock line on a supplier invoice when editing the details of the stock line (double-click on the stock line).

Add/edit supplier invoice line...

Item	Sensitivity disc Doxycycline		
Quantity	1	77/3310	
Pack size	1 Cart/5		
Total quantity:	1	Location	
Batch	1091060	Volume per pack	0 m3 
Expiry	30/9/14	Adjusted local cost (USD)	% Margin
Invoice line unit cost (USD)	142.38000	142.38000	0.00
		Donor	UNFPA

If you change the **Default donor**, you will be presented with the following options:



- “Do nothing”: The change will have no effect on existing invoice line(s).
- “Update existing donor lines with this donor”: existing donor lines will be updated to match the newly selected donor.
- “Assign this donor to the lines with no donor”: lines with no donor selected will be updated with the newly selected donor.
- “Assign this donor to all lines”: all lines will be updated with the newly selected donor.

Donors and the customer invoice

Customer invoices, including stock transfers for donated goods are created in the usual way - refer [Issuing Goods to a Customer \(Customer Invoices\)](#).

- The key thing to note is that when selecting from the stock lines to add to the Customer Invoice, the donated stock lines can be distinguished from the other stock lines by the donor name in the **Donor** column - see below:

edit line

Item	AMOXYCILLIN 250mg TAB/CAP	 40											
Line	5	Item category : 6.2.1 Beta Lactam Antibiotic											
Quan	50 of 100000												
Pack	10 ea	Bulk/Outer pack size 0											
Re-lookup Sell Price													
L...	Issue	Available	Tot in st...	Pack	H...	Batch	Exppdate	Supplier	Donor	Location	Cost Price	Sell price	Sta
1	0	0	2700	1	<input type="checkbox"/>	ANTUV00	30/06/201	CMS		TAB	1.86000	1.86000	
2	0	0	2400	1	<input type="checkbox"/>	ANTUV00	30/06/201	CMS		TAB	1.86000	1.86000	
3	0	160000	165000	1	<input type="checkbox"/>	ANTUV00	30/06/201	CMS		TAB	1.86000	1.86000	
4	0	116500	116500	1	<input type="checkbox"/>	6771204	30/04/201	CMS		TAB	1.86000	1.86000	
5	50	100000	100000	10	<input type="checkbox"/>	ABC1234	30/09/2018	CMS	arch	TAB	1.78000	1.78000	

Total quantity issued 500
 Total quantity available 1276500

Abbreviations

Abbreviation	<input type="text"/>	+
Expanded directions	<input type="text"/>	

[Cancel](#) [OK](#) [OK & Next](#)

mSupply will always suggest stock lines according to selection criteria (primarily, FEFO). If you want to override this:



- If a donated stock line is **not** the first expiring and you **do** want to issue it, you will need to manually select it.
- If a donated stock line **is** the first expiring and you **don't** want to issue it, you will need to manually **de-select** it.

Reporting

Obviously, one of the points of entering all this donor information is to be able to report on it. When the donor tracking preference has been turned on, many of the stock based report filters in mSupply will have an additional donor filter added to them. Simply enter the donor filter settings you need, as appropriate, to filter the reports accordingly.

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