User Guide

1. About mSupply

- 1.01. Introduction
- 1.02. Why mSupply?
- 1.03. Who uses mSupply?
- 1.04. Which combination of mSupply products best suits your organisation?
- 1.05. Terms, definitions and conventions used in this user guide

2. Setting Up mSupply: Technical Guide

- 2.01. Requirements
- 2.02. Installation
- 2.03. Starting mSupply for the first time
- 2.04. Client/Server FAQ

3. Tutorial

- 3.01. The tutorial like no other
- 3.02. Logging in
- 3.03. Opening the example data file
- 3.04. Navigator
- 3.05. Creating and viewing items
- 3.06. Customers and suppliers
- 3.07. Viewing Names in Google Maps
- 3.08. Enter incoming goods (supplier invoices)

4. Items

- 4.01. About items
- 4.02. Adding a new item
- 4.03. Item categories
- 4.04. Item master lists
- 4.05. Programs
- 4.06. Stock locations and location types
- 4.07. Building (manufacturing) items
- 4.08. Merging two items
- 4.09. Ad hoc items
- 4.10. Non-stock items
- 4.11. Managing drug interaction groups
- 4.12. Managing item access with Departments
- 4.13. Prices in mSupply
- 4.14. Repacking items
- 4.15. Show items with stock
- 4.16. Splitting a stock line
- 4.17. Stocktakes
- 4.18. Phased stocktakes
- 4.19. Inventory adjustments
- 4.20. Units
- 4.21. Forecasting
- 4.22. Pickfaces and Replenishments setup
- 4.23. Pickfaces and Replenishments

5. Customers and Suppliers

- 5.01. Names: using, adding and editing

6. Purchasing

- 6.01. Ordering stock from suppliers
- 6.02. Managing purchase orders
- 6.03. Purchase order categories
- 6.04. Ordering from one store to another (internal orders)
- 6.05. Multi-store Purchase Orders

7. Receiving Goods

- 7.01. Supplier invoices
- 7.02. Goods receipts
- 7.03. Editing pack sizes
- 7.04. Managing outstanding purchase order lines (pipeline stock)
- 7.05. Custom stock fields
- 7.06. Managing donors

8. Issuing Goods

- 8.01. Issuing goods to a customer (customer invoices)
- 8.02. Viewing customer invoices
- 8.03. Backorders
- 8.04. Electronic invoices
- 8.05. Transferring goods to another store
- 8.06. Box management
- 8.07. Stock control

9./12./15. Scanner Goods

- 18. 01.

- 3.09. Enter outgoing goods (customer invoices)
- 3.10. Entering quotations
- 3.11. Working with lists
- 3.12. Where to now?
- 5.02. Contacts
- 5.03. Merging two names
- 5.04. Name categories
- 5.05. Name tags
- 5.06. Suppliers: adding and viewing
- methods for your customers (requisitions)
- 8.08. Customer budgets

9. Returning Goods

- 9.01. Return goods to a supplier
- 9.02. Receiving goods back from a customer

- [ ] Payment instructions for using Bpay
- [ ] Payment instructions for using Direct Deposit
- [ ] Payment instructions for using Paypal
- [ ] Payment instructions for using Stripe
- [ ] Payment instructions for using Westpac Payway

10. Payment and Receipts

- [ ] 10.1. Payment instructions for using Bpay
- [ ] 10.2. Payment instructions for using Direct Deposit
- [ ] 10.3. Payment instructions for using Paypal
- [ ] 10.4. Payment instructions for using Stripe
- [ ] 10.5. Payment instructions for using Westpac Payway

16. Reports User Web Interface

- 14. Data Import and Export

- 17.08. Importing supplier inv

17. mSupply Mobile (Android)

- 12. Mobile app
- 13. Importing stores
- 14. Importing suppliers
- 15. Importing customers
- 16. Importing requisitions
- 17. Importing internal orders
- 18. Importing suppliers
- 19. Importing customers
- 20. Importing requisitions
- 21. Importing internal orders
- 22. Importing suppliers
- 23. Importing customers
- 24. Importing requisitions
- 25. Importing internal orders
-

tenders
- 17.15. Exporting items, exporting items and stock
- 17.16. Exporting locations
- 17.17. Exporting names
- 17.18. Exporting records
- 17.19. Exporting invoices
- 17.

20. Exporting invoices to Moneyworks
- 17. 21. Exporting to MYOB
- 17. 22. Exporting sites
- 17. 23. Exporting assets
- 17. 24. Exporting to the dashboard

28. Technical Topics
Technical Topics
System

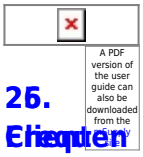
(alte Module

- 26. 01. 25 Miscellaneous topics
- 26. 02. 20 Server installation & setup
- 26. 03. 20 Transaction entry
- 26. 04. 20 Budgets
- 26. 05. 20 Editing menu
- 26. 06. 20 User interface
- 26. 07. 20 Virtual stores

19. Integration of Other Systems with mSupply

- 06. Opening balances
- 07. Inventory adjustments
- 08. Stocktakes
- 09. Transfers between stores
- 10. Customer returns
- 11. Supplier returns
- 12. Internal use
- 13. Expiries
- 14. Sales
- 15. Customer invoices
- 16. Supplier invoices
- 17. Purchase orders
- 18. Requisitions
- 19. Inventory management
- 20. Data Tables and Fields
- 21. Preferences
- 22. Users
- 23. Sync
- 24. Help
- 25. Troubleshooting
- 26. Appendix 1: Setting up mSupply on a network
- 27. Appendix 2: Setting up mSupply Mobile
- 28. Appendix 3: Setting up mSupply Server
- 29. Appendix 4: Setting up mSupply Server on Linux
- 30. Appendix 5: Setting up mSupply Server on Windows
- 31. Appendix 6: Setting up mSupply Server on Mac
- 32. Appendix 7: Setting up mSupply Server on Raspberry Pi
- 33. Appendix 8: Setting up mSupply Server on Docker
- 34. Appendix 9: Setting up mSupply Server on Kubernetes
- 35. Appendix 10: Setting up mSupply Server on AWS
- 36. Appendix 11: Setting up mSupply Server on Azure
- 37. Appendix 12: Setting up mSupply Server on Google Cloud
- 38. Appendix 13: Setting up mSupply Server on DigitalOcean
- 39. Appendix 14: Setting up mSupply Server on Heroku
- 40. Appendix 15: Setting up mSupply Server on Vultr
- 41. Appendix 16: Setting up mSupply Server on Linode
- 42. Appendix 17: Setting up mSupply Server on Hetzner

dpp
y
es
crip
tion
s



A PDF version of the user guide can also be downloaded from the

26.
Ch
Sp
Qu
ns

- 28. 01. How to re-set the mSupply client
- 28. 02. Remote support - installing TeamViewer
- 28. 03. Why is my stock bal

ance report showing negative?
- 28.04. How to remove stock lines that have ‘0’ available
- 28.05. What do I need to set up mSupply Mobile?
- 28.06. Why is my stock

on hold?
- 28. 07. How to correct wrong pack sizes
- 28. 08. How to report by invoice category
- 28. 09. Imprest work flow
- 28. 10. Tips and tricks
- 28. 11. Benefits of a

multi-store system
- 28.12. How to access Temp folder
- 28.13. Fixing incorrectly received stock
- 28.14. Navigating inactive windows or form
- 28.15. Wastage Predict

ion
due
to
exp
iry
wh
en
ord
erin
g