The tutorial like no other

If some of the terms used below are not clear, please see Conventions used in this user gui

Only mSupply®'s basic features are covered in the Tutorial; its many e
in depth in appropriate chapters in the User Guide.

mSupply Explained

This chart shows the common steps in most pharmaceutical supply pro
manufacturing step only applies to manufacturers!)

mSupply workflow diagram

The two most common transaction types in mSupply® are the supplier invoice (si) and the customer invoice (ci). These transactions record stock purchases from supp
supplies to customers. mSupply® records a full audit trail by only allo
of a transaction. Therefore, given an opening balance of stock for the
series of transactions that result in the recorded closing stock.

Of course, there is much more to it than that, but these two transactio

Note that mSupply® has dozens of preferences (File > Preferences) which change the
behaviour of many aspects of the software. If you have customised Pre
settings, some aspects of this tutorial may not be as stated below. To
recommend you start with a fresh copy of the example data to ensure t
correctly.

Before starting the tutorial, you will need to have installed mSupply®,
database. If you haven't done so, see Installation

mSupply® runs best with a screen resolution of 1024 or 768 or greater
screen set to 950 x 850 or lower, some windows will not fit on the scre
resolution:

- Windows: Right click anywhere on the desktop, select Properties > Settings and make the necessary changes.
- Macintosh: Choose Apple > System Preferences then click Displays icon and set a new resolution

Opening the example data ßle

You will have two icons on your desktop - double-click the mSupply icon

If you are opening mSupplyﬁ for the ßrst time, the program should aut
data ßle.

The full path to the data ßle is displayed, along with other useful info Menu >Help>About mSupply

If you have already been using mSupplyﬁ and have another data ßle op
example data ßle for use with this tutorial, then you can use the menu File > Open the mSup
ßle& **to open the example data ßle. In Windows, by default the exam
stored inside **c:/mSupply/database/ navigate to the location and open the data

If you have chosen a dißerent location from the one suggested by the
folder will be in your chosen location.

A password entry window is presented as mSupplyﬁ opens up a data ßl
the user that the example data base is in use.

The User 1 (pass= user1) entry should be highlighted, but if it is not, it sh
Enter user1 (without the quotes) as your password.

The Choose store drop-down list will display General, and the Choose login mode drop-down list will display Store - these should not be changed. Click the OK button. After you have l
on, the Navigator screen appears:

The Navigator

Overview

The mSupplyﬁ Navigator provides access to most of the functions you
mSupplyﬁ. You will learn that many of these functions may also be ope
sequences from the various Menu items, and once you have gained some experience
it quicker to use the shortcuts.

The Navigator always opens at the Customers screen in Store mode, shown above, or

Patients screen in Dispensary mode, shown below:

Displayed along the top of the screen are four items of information:

- the mode selected at logon (store or dispensary),
- the store in which you are working - for most users, General ,
- the active data file,
- the user currently logged on.

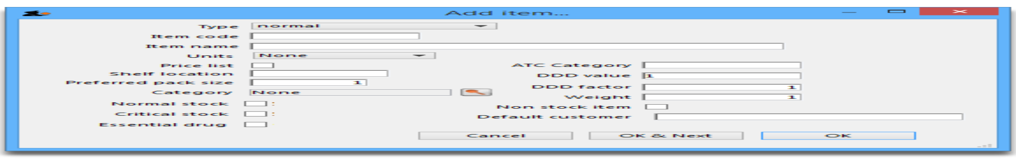
Immediately below this, there are six large icons, Customers, Patients, Suppliers &&… Admi
Click on the icon appropriate to the task you are performing, and you
displaying annotated icons listing the available functions and procedu
either by clicking on the icon of your choice with the mouse, or by adv
the right or left arrow keys and pressing Enter. You will be using the Items panel of the
Navigator in the next step in the tutorial, and as the same procedures
will quickly become familiar with them.

The bottom right area of the Navigator screen is available for displayi
Acme Medical Supplies is displayed in our example. The placing of y
choosing File > Preferences > Logo. You can also read here how to do it

Creating and viewing items

Creating a new item

For this section of the tutorial, we are going to add two new items to
the Navigator's opening screen, then click on the 3rd of the large icons near the top



and the following screen appears:

- Click on the New item icon
- You are presented with a window with a number of fields to enter:

Below is a list of fields and the text to be entered into each field. Use ßeld to ßeld or, using the mouse, click on the ßeld you want to edit.

Type: **The default entry is** normal** shown in the drop-down list, and should no

Item code: Enter amo500t then press the Tab key to advance to the next ßeld

Item name: Enter Amoxycillin 500mg tab/cap then press the Tab key to advance to

Continue to use the Tab key for the rest of the tutorial when you need to advan next ßeld.

**Units: ** None is displayed by default. There are no units, enter tab/cap (the common unit) here:

**Price list: **Click in the box so a check appears in it. This means th the price for this item will be included.

Shelf location: **Enter** a3. Amoxycillin is stored on shelf 3 in the a section store. Note that A is interpreted dißerently from a , so it is recomm either all upper case or all lower case letters for entering shelf locati

Preferred pack size: **Enter** 100. This means we want a 100 unit pack to be ou comparing prices of this item.

**Category: **If a list of categories has been deßned, this ßeld allows to be placed in its appropriate category.

**Normal stock, Critical stock, Essential drug, ATC category, DDD valu stock item, Default customer: **For this tutorial, ignore these ßelds a

Click the OK & Next button to add this item to mSupplyﬁ. The window's ßelds to add a further item.

If you have no more items to add, click the OK button, and only the item just added a exit. If you accidentally click OK & Next and then want to exit, just click the Cancel button. The Amoxycillin 500mg tab/cap would still be entered, as it was saved the OK & Next button.

Proceed to add a further item with the following details:

Note that if you make a mistake, you can click in a ßeld and edit the v

Field	Enter&.
Item code	amo125s
Item name	Amoxycillin 125mg/5ml syrup
Units	mL
Price list	check the check box.
Shelf location	enter a7 .
Preferred pack size	enter 60 .

Click OK now that you have added the item, then click Cancel to exit the window.

Congratulations! You have now added 2 items to our example data ﬁle,
them.

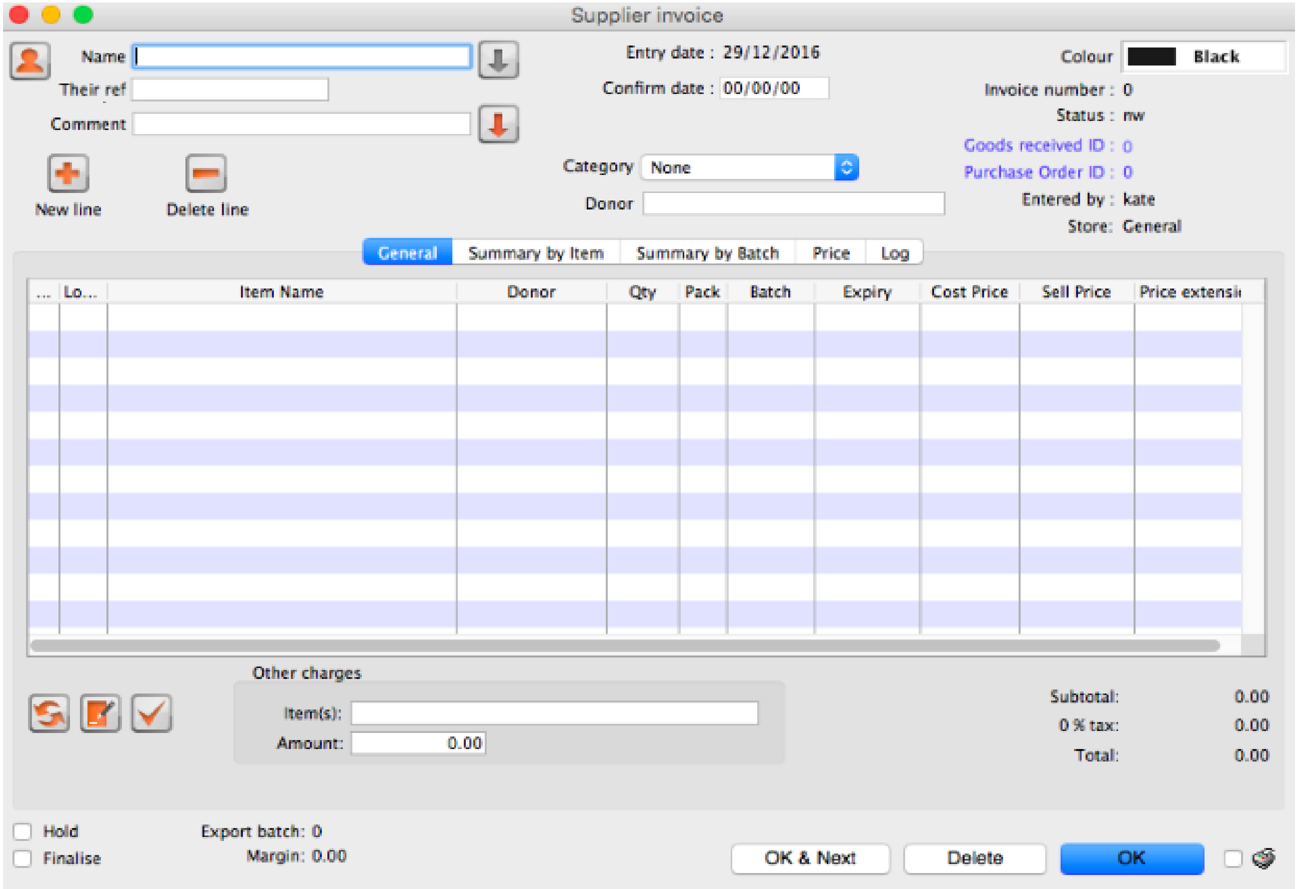
Viewing item details

Click Show items from the Navigator's Item screen.

You will be presented with a window to ﬁnd items:

- Type a into the text entry area, then click the // Find// button.
- A list of all the items whose name or code starts with a is shown

- We will choose the Amoxycillin 250mg tabs/caps - an item that was
ﬁle. To choose the item, double-click anywhere on its line in the w
- You will now be presented with a window that displays a lot of info
250mg tab/caps . From this window you can see stock on hand, vie
quotations, view usage for this item for the last 24 months, view b
notes for this item. Phew!



- At this stage, we only want to know how to view the information. F information displayed see Item Edit - General Options
- When you have finished viewing the information, click the// OK// b items.
- If you want to view a different item, you can double-click its line. the top right corner (on Windows) or the top left corner (on a Mac) Navigator

Customers, Suppliers, and Contacts

Adding a Customer or Supplier

For this tutorial example, we will first add a new supplier, then add a

Adding a Supplier

From the Navigator's opening screen, click on the Suppliers tab, then the large icon New Supplier

You will be shown this window to enter the details:

You can now enter the details for your new Supplier.

Field	What to do&.
Code	Enter Acmep to identify the Supplier (Acme Pharm You need to choose a unique code for each name. Try to choose a logical system, as the code is used Supplier (or Customer) when you are entering invoi (for example, try to start the code with at least the the Supplier name)
Charge to	Enter Acmep again. This ßeld is only used when e accounting program - this code must match the code you use for the supplier in your accounting program
Name	Enter Acme Pharmaceuticals - the name of our sup
Master ID	Ignore for now
Category	
Customer check box	Leave this box unchecked, as we are entering a new
Supplier check box	As you chose new supplier this box is already che
Manufacturer	Leave unchecked
Benchmark	Leave unchecked
Contact	
Email, Web site etc.	Fill in with the appropriate details
Status	
Hold checkbox	If this box is checked for supplier or customer, that customer can neither supply nor be supplied with it
Preferred checkbox	Leave unchecked
Price Category	This applies to customers. It is possible to assign r customers. Leave it set to A .
Supplier details	
Currency	The ßeld is automatically ßlled in with Nrs (=Nepali rupees - the default currency in our examp This is the currency that this supplier will use to bi
Margin	Enter 10 . Items purchased from this supplier will margin added to calculate the selling price.
Freight factor	Enter 1 . Acme Pharmaceuticals does not charge a Their prices are CIF (Cost, Insurance & Freight to ßeld is only used for comparing quotations from sup - it is not used for actual invoices.
Other	
Category 1-6	Ignore for now
Custom 1-3	Ignore for now
Flag	Ignore for now
Comment	You can enter a brief note here (Ignore it for now)
Print invoices	Ignore for now
Address	
Address, Main & Postal address.	You can complete these with appropriate values.

If you are satisßed with the details, click OK . You will be returned to the mSupplyﬁ sta

Adding a Customer

From the Navigator's opening screen, click on the 1st icon near the top of the screen, and then click on New Customer from the Navigator scree presented with a window similar to the above New Supplier to enter the details:

Fill in the ßelds as follows:

Field	What to do
Code	Enter bluec
Charge to	Enter bluec
Name	Enter Blue Cross Hospital - the name of our
Master ID	Ignore for now
Category	
Customer check box	As you chose new customer this box is alread
Supplier check box	Leave this box unchecked, as we are not enter Supplier.
Manufacturer, Benchmark check boxes	Leave these unchecked too
Status	
Hold checkbox	If this box is checked for supplier or customer that particular supplier or customer can neithe supplied with items.
Price Category	This applies to customers. It is possible to as prices to customers. Leave it set to A .
Contact	
email, web site, etc.	You can complete these with appropriate value
Other	
Category 1-6	Ignore for now
Custom 1-3	Ignore for now
Flag	Ignore for now
Comment	You can enter a brief note here (Ignore it for n
Print invoices	Ignore for now
Addresses	
Address, Main, Postal and Shipping address.	You can complete these with appropriate value

Click the // OK// button to save the details and exit the window.

Editing a Customer or Supplier

Let's now look up Acme Pharmaceuticals

- Choose // Show suppliers// & from the Navigator's // Supplier// scr window to enter as much of the Supplier name or the code as you k

For this tutorial, just click on the Find button you will get a full list of all suppliers.

For information on the Normal - Fuzzy slider, see Editing a Customer, Supplier or Manufacturer

- Double-click the Acme Pharmaceuticals entry in the list. You will
  as you used to enter Acme Pharmaceuticals as a new supplier.

- Note the window has Tabs down the left side in the sidebar: Ger
  Backorders, Quotes and Notes, etc. Let's add a note for Acme
- Click on the Notes tab.

- Click on the // New Note// button. Today's date is entered automat
  inside the Note Entry field.
- Enter This is a test note then click the // OK// button.

- The first line of your note text will appear in the list of notes.
- Click // OK// to exit viewing/editing the supplier, then click // OK/
  suppliers.

Viewing location in Google maps

If the precise geographical location of the supplier or customer is known, the Lat and Long fields can
be completed in the Photo tab. Entries are made in these fields thus:

- decimal degrees, and not degrees, minutes and seconds
- in the Lat field, locations south of the Equator are entered as negativ
  preceded by a '-' sign
- in the Long field, locations west of the Prime meridian are entered as
  is preceded by a '-' sign

Don't know a precise location? Using Google Maps find the desired loc
cursor on it. Right click and select What's here from the drop down list. The geographi
co-ordinates are displayed at the top of the screen. These should be r
the appropriate Lat and Long fields in mSupply.

In our example, the location of the imaginary Acme Pharmaceuticals is

Click on the Google Maps button to display a map of the vicinity, with the prec by a green arrow.

Enter incoming goods (a supplier invoice)

In some countries an invoice for incoming goods is referred to as a b mean the same thing.

Let's suppose we have just received a shipment containing two items f and we want to enter these goods into stock. The invoice looks like th

</HTML>

From: Acme Pharmaceuticals	Bill no.:A939					
Item	Quan	Pack	Batch	Expiry	Price	Extension
Amoxycillin Caps 250mg	1000	100	b9333	31/12/2015	344	344,000.00
Cotrimoxazole 240mg/5mL susp	65	60	b23d	31/10/2015	21	1,365.00
Cotrimoxazole 240mg/5mL susp	150	60	b22d	31/01/2016	14	2,100.00
					Total:	347,465.00

<HTML>

</HTML>

Choose Supplier > New invoice from the menu or navigator.

The cursor will be positioned in the // Name// ßeld. Type a and then
only one supplier whose name starts with a , the details will automati

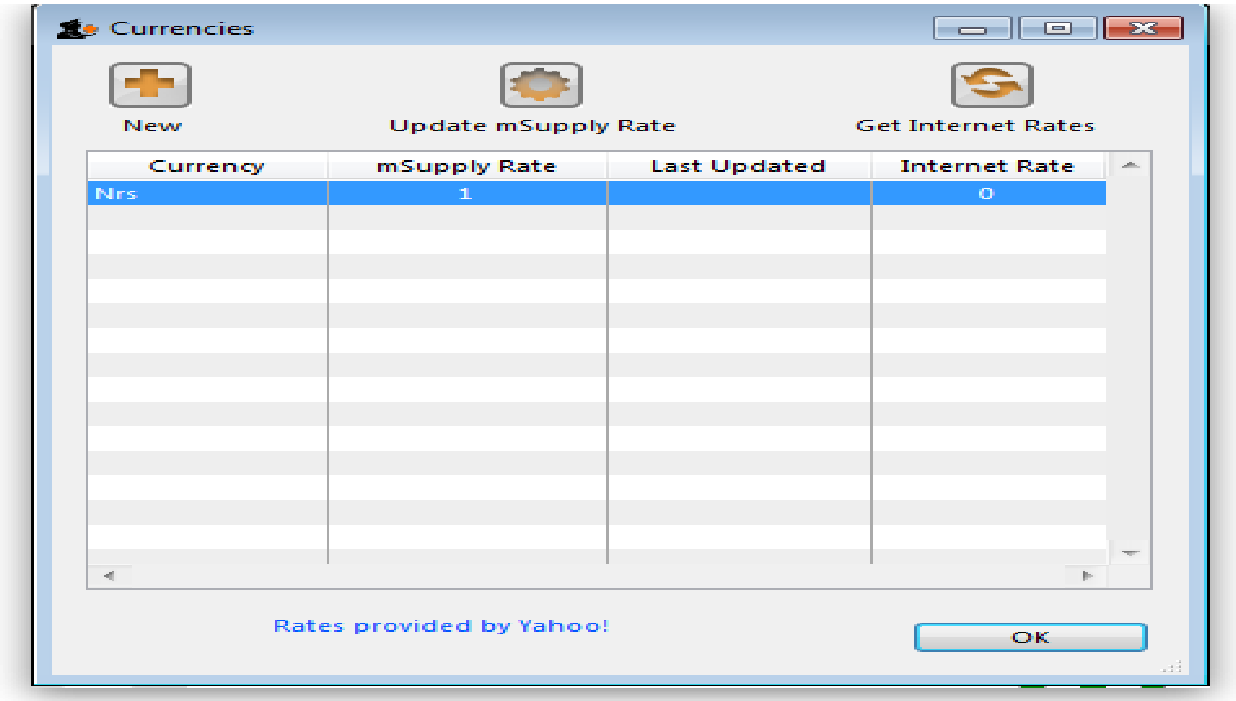
In our case the supplier Arbuckle distribution was already present, s
window listing the suppliers starting with a . Double-click the line co
Pharmaceuticals to choose them for this invoice. The insertion point
ßeld.

Type A939 into the // Their ref.// ßeld. Press the Tab key to advance

In the // Comment// ßeld you can type a comment or information to ide

Note that the margin is showing as 10 percent (the percentage that wi
obtain the selling price).

Click the // New line// button to add the ßrst invoice line. You will be
adding invoice lines.



- The cursor will be positioned in the // Item// ßeld. Type a , then p presented with a window listing all items whose name starts with Amoxycillin 250mg tab/cap entry to choose it. The cursor will now Quantity ßeld.
- Enter the number of packs received in the // Quantity// ßeld: 1000 number of packs, not the total quantity of capsules). Press Tab to
- Enter the pack size: 100. Press Tab to advance to the next ßeld.
- The cursor will now be in the location ßeld. Ignore this for now an
- You can also ignore the Volume per pack ßeld and press Tab to ke
- Enter the batch number: b93333. Press Tab to advance to the ne
- Enter the expiry date: 31/12/2014 (Presuming you have dates set your dates are set to the USA's mm/dd/yy format, enter 12/31/14) digits for the year, as long as the year is in the range 1961 to 206 must have the year entered as four digits. Press Tab to advance to
- In the Invoice line cost ßeld enter the pack cost price: 344
- The table shown in the picture at the bottom appears if you have Show previous purchases s checked in your preferences. It will show purchases you have mad
- Donor is the donor who provided funds for the goods on this invoice activating donor tracking in File/Preferences/Suppliers/New Suppli check box.

As we have another line to add, click the // OK and Next// button. The window is now blank to accept your second invoice line.

- Enter c into the // item name// ßeld and press tab. In the list of Cotrimoxazole 240mg/5mL susp . Double-click the entry.
- Enter the remaining invoice details for Cotrimoxazole 240mg/5mL
- num units: 65
- pack size: 60 (Note that it is better to record the actual volume volume is not important- for example with an eye-drop, where you
- batch: bb23d
- expiry: 31/12/2013
- price: 21.00 (You can just enter 21)

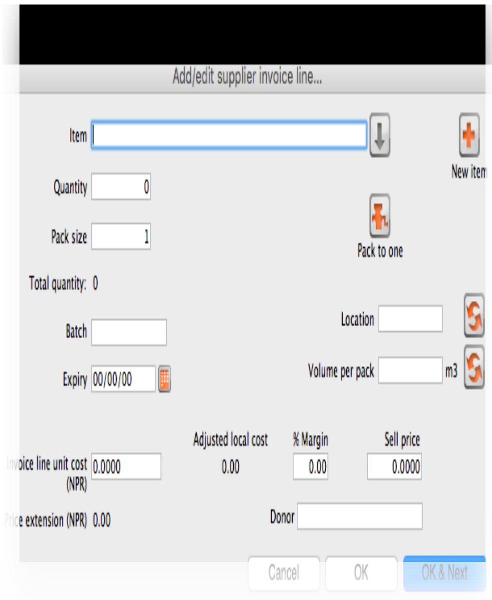
Click the // OK & Next// button to save the details and start to enter a

Now enter the third item on the supplier invoice from the example invo
Pharmaceuticals example invoice above.

When you have ßnished, click the // OK// button to take you back to th

Our invoice will now have 3 items added to it. The invoice total should
appear like this:

If you have made a mistake, click on the relevant line , which will now
on it allows you to edit it. You will be shown the line details again, ar
and click the // OK// button to save your changes. There are 3 icons in
invoice window.



1. This allows you to rearrange the order in which the lines are show
2. Here you can make a note of anything relevant to this invoice
3. This will copy the details of the invoice to the clipboard

Now click the // OK// button. As long as you have left the print check
checked, you will be asked if you want to print the invoice (you may d
you are shown two windows. The ßrst window is the page setup for you
allows you to specify how many copies to print, etc. (The second wind
box, where you can preview the print job).

As this invoice is a supplier invoice it has been conßrmed when yo
invoice entry window. You can view and edit the invoice details until t
if you issue some of the stock you have just entered to a customer, so
will no longer be edit-able.

NOTE - As of mSupply® v190, a more precise alternative for entering r
implemented. See Viewing and editing supplier invoices created via Goods

Enter outgoing goods (a customer invoice)

Now let's suppose we have just received an order as follows: <HTML>

</HTML>

From:	Blue Cross Hospital
Order number:	PO882
Delivery: Express courier please	
Item	Quan
Amoxycillin 250mg tab/caps	10,000
Cotrimoxazole 240mg/5mL susp	120

<HTML>

</HTML>

Choose New Invoice from the Customer menu, and the following window

Type b into the // Name// field, and press the Tab key. You will be pr
whose name starts with b . Double-click the Blue Cross Hospital ent

- In the Their ref field enter PO882 .
- In the Comment field enter This afternoon by courier
- Click the New line button to add a line to the invoice. You are presented window.

Enter the following details:

- Type a into the // Name// field then press the Tab key. In the list double-click the Amoxycillin 250mg tab/cap entry.

- You will see that a list of available stock has appeared in the wind to the Line number field. Enter 2 to choose line 2. (The list is sorted s shortest expiry date are at the top - usually you would choose the today we're being different!).

- Quantity field - the line we have chosen has a pack size of 100 ,
  quantity of 100 to make a total of 10,000

Click the OK & next button to add the second line of the order.

This time enter c and press the tab key. Double-click the Cotrimoxa
The window will close and the list of available batches and quantities

Note that in the list of available stock, the second line we entered fro
now at the top of the list - this is because the list is sorted so that th
date comes to the top of the list.

Line 1 is selected, despite the fact that there is insufficient stock of li
Nevertheless, you should enter 120 in the //Quantity// field, press Tab and the following mess
will appear:

For this tutorial, choose Distribute (which is likely to be your normal choice), and
stock to complete the order will be drawn from another batch/other ba
which will be the first to expire. There will be occasions, however, wh
automatic means of distribution, and in this event you would select //
the batches from which you wish to meet the order.

Click the // OK & Next// button

Because the invoice has not been confirmed, the available amount fo
but the total stc (total stock) is still showing as 100 . mSupply® inc
you can see stock that has been allocated to an invoice but has not ye
edit the other invoice if stock is urgently needed on the current invoic

Click // OK// as we are finished entering lines. You will be returned to
window.

At the bottom right of the invoice you will see the invoice total.

- As the customer has requested an express courier, we will charge
  (Rs = rupees the currency in our tutorial). At the bottom of the w
  Other charges // field:
- There, enter Courier charge and press the Tab key
- In the amount field enter 200 and press the Tab key. The new total should be 37

Now we are ready to print a packing slip. Make sure that Print is checked in the bottom right
and click OK, a window appears displaying your print options:

We want to print a packing slip, so the default settings suit our purpo
slip printed has a column where you can write down the actual quantit

Confirming the invoice:

Let's suppose the order was successfully packed according to the pack
confirm the order and print an invoice to pack with the goods. (We're i
is on her way!)

First, we need to look up the invoice. Here's an easy way to look up th

- Choose Show invoices... from the Customer menu.
- If you know the invoice number (printed on the packing slip) you c
the most recent invoices, you enter the number of invoices to view
want is the last one to be entered, we just type 1 and click OK - you will be taken straig
the invoice.

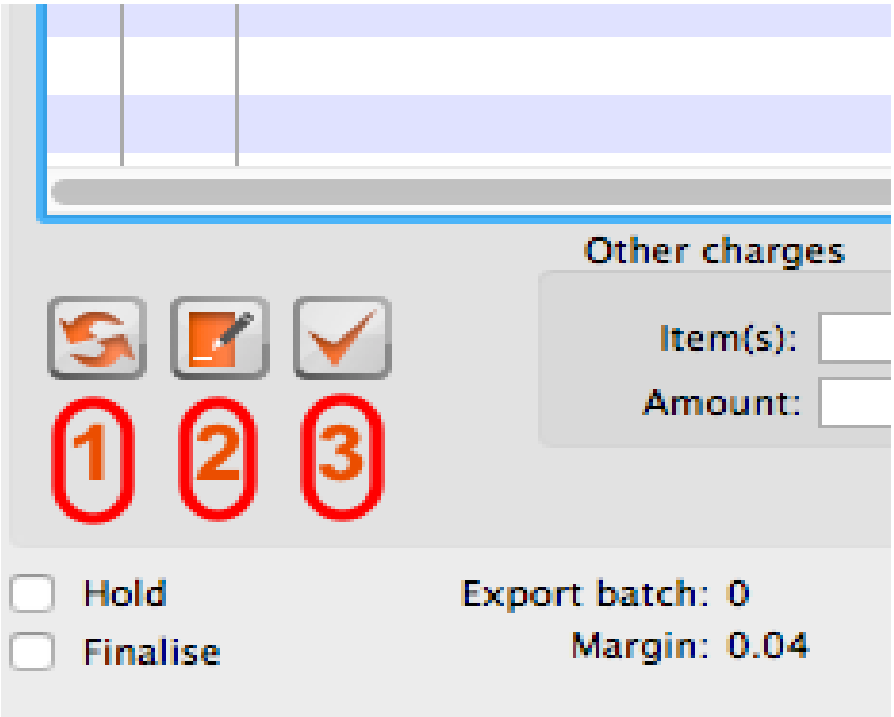
Click the Confirm truck icon,

and today's date will appear in the Confirmed field. Click OK to confirm you want to proce

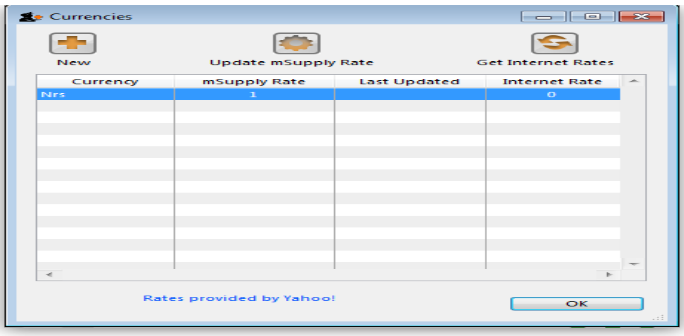
The invoice is confirmed, and you are given the opportunity to print an

Entering Quotations

mSupply® allows you to keep a record of prices that suppliers have qu
you have just received 2 quotations for Amoxycillin 250mg capsules; o
US dollars for their quotation, and the other has used British pounds,
the quotations, it is necessary that both of these currencies are recog
the menu Special > Currencies, and then this window appears:

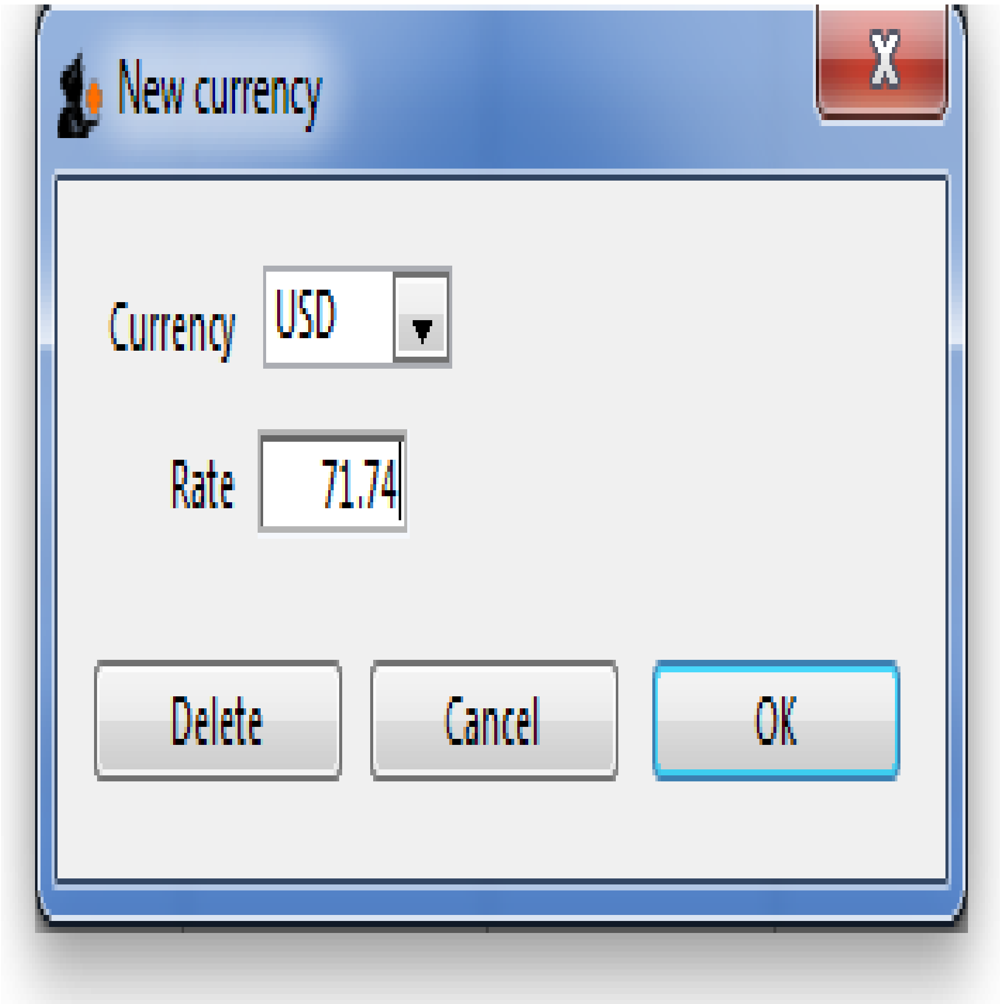


Click on the New button, and a window appears which allows you to en



Enter USD in the Currency ßeld; in the Rate ßeld you should enter th currency - in this case Nepali Rupees - equivalent to 1 US dollar; at t the rate was 71.74 N.Rs. to US $1, so 71.74 Rate ßeld. Click OK then, and repeat the exercise for British pounds, the rate presently being 116.3

Once you have performed this, the Currencies window should look like



We're now ready to proceed.

To enter a quotation:

1. Choose Items > Show items
2. Type Amox then press Enter.
3. Double-click the Amoxycillin 250mg caps entry from the list.
4. The item view window, on the left, has vertical content list (Gener
Quotes line.
5. Click the New Quote button.
6. Note that the item is entered for us. We need to choose a supplier
7. Enter Arb in the supplier field and press tab. Arbuckle distributio
They have quoted in US dollars, so choose USD from the currenc
8. Their price is US $3.50 per 100 capsules, so enter 3.5 in the pri
size field.
9. Click OK to save the entry
10. Now click new quote again and enter the following details:

<HTML>

</HTML>

Supplier	Gold Medical Supplies
Currency	Sterling [GBP]

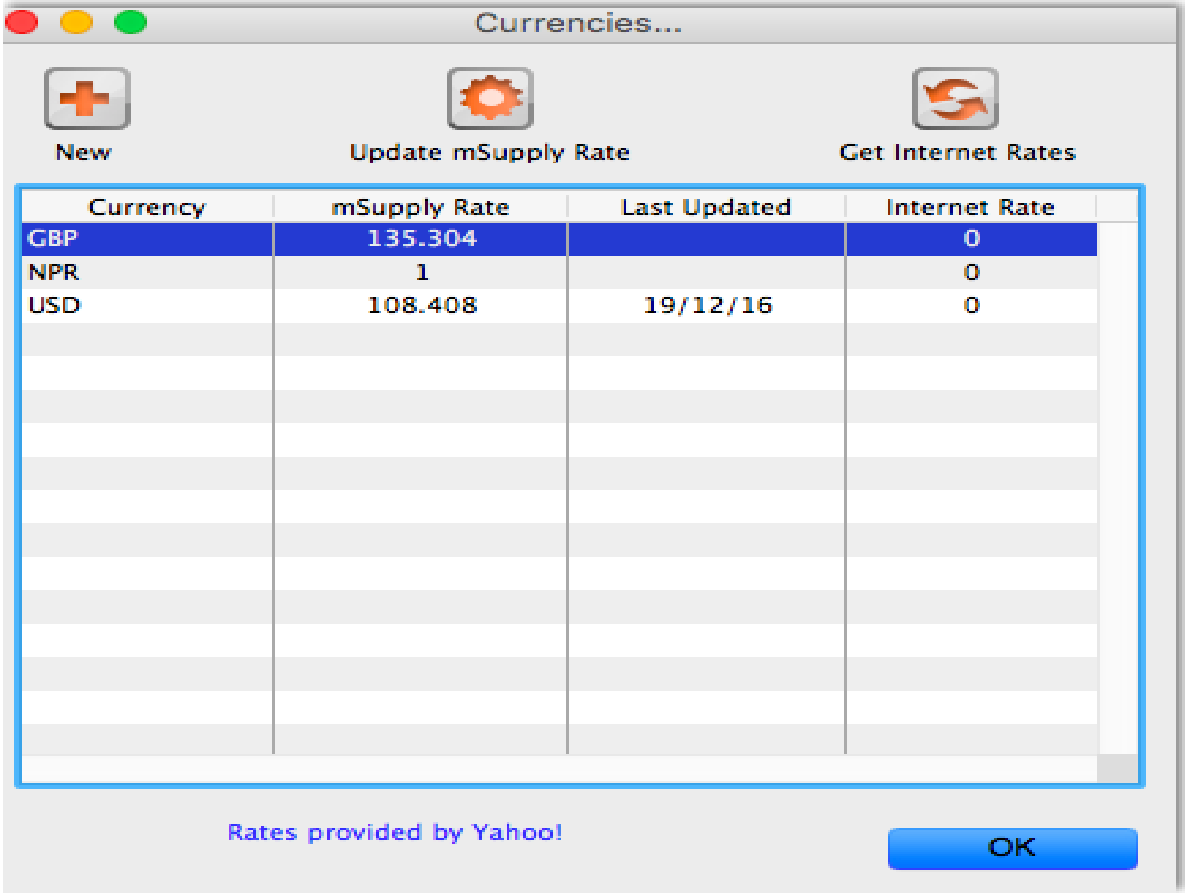
Supplier	Gold Medical Supplies
Price	20.00
Pack size	1000

<HTML>

</HTML>

Click OK when you are done.

Now we can see the list of quotes, which should look like this:



Notice how the adjusted price takes into account differences in pack s
easily compare suppliers.

Thanks for working through the tutorial. We hope you learnt something
to start using mSupply fi!

Where to now?

- Use the example database to experiment with different commands a
  the user guide.

- Have a dummy run at starting a new data ßle and using it.
- Return to our main documentation page at www.docs.msupply.org.nz

// Previous: Logging in Next: Working with lists //