mSupply Customer Interface

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What is it?

The mSupply 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 Customer Interface.

Features and Limitations

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

mSupply Customer's features are:

- **Invoices**: Display a list of (Supplier) Invoices, Processed and In-Process, for stock issued from your mSupply supplying store, and details of any selected Invoice. Invoices that have been finalised cannot be edited. Supplier Invoices cannot be deleted.
- **Orders**: Display a list of Orders placed with the mSupply 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. 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 Customer. Once Stock leaves the mSupply system to a Customer, mSupply stops keeping track of these details.

Connecting to mSupply Customer

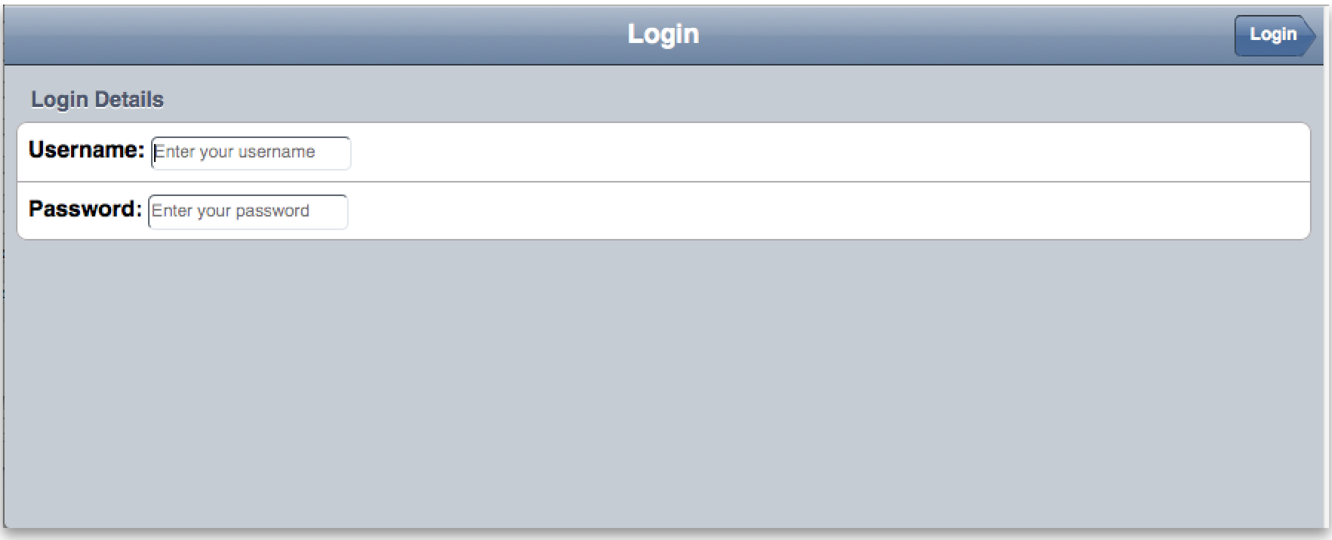
Once the mSupply web server is running, you can access it by typing http://ip_address_of_machine_running_msupply/customer/

The hyperlink above links to Sustainable Solutions' mSupply Web Server for mSupply Customer demonstration. You will not be able to proceed further without a username and password - see below. Contact us email:info@msuppy.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 Customer login

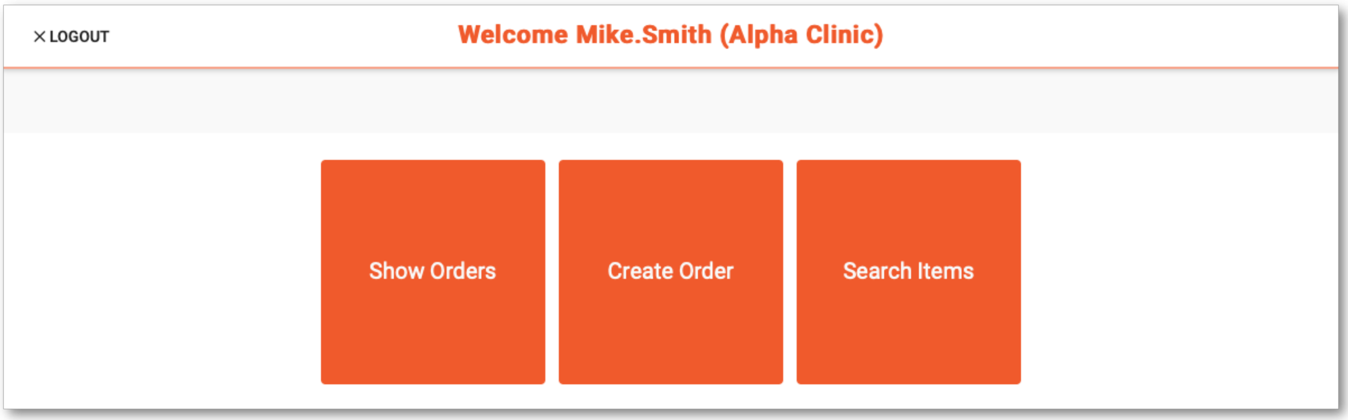
Firstly you will be shown the mSupply login page.



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

The Navigator

You are now shown the mSupply customer options:

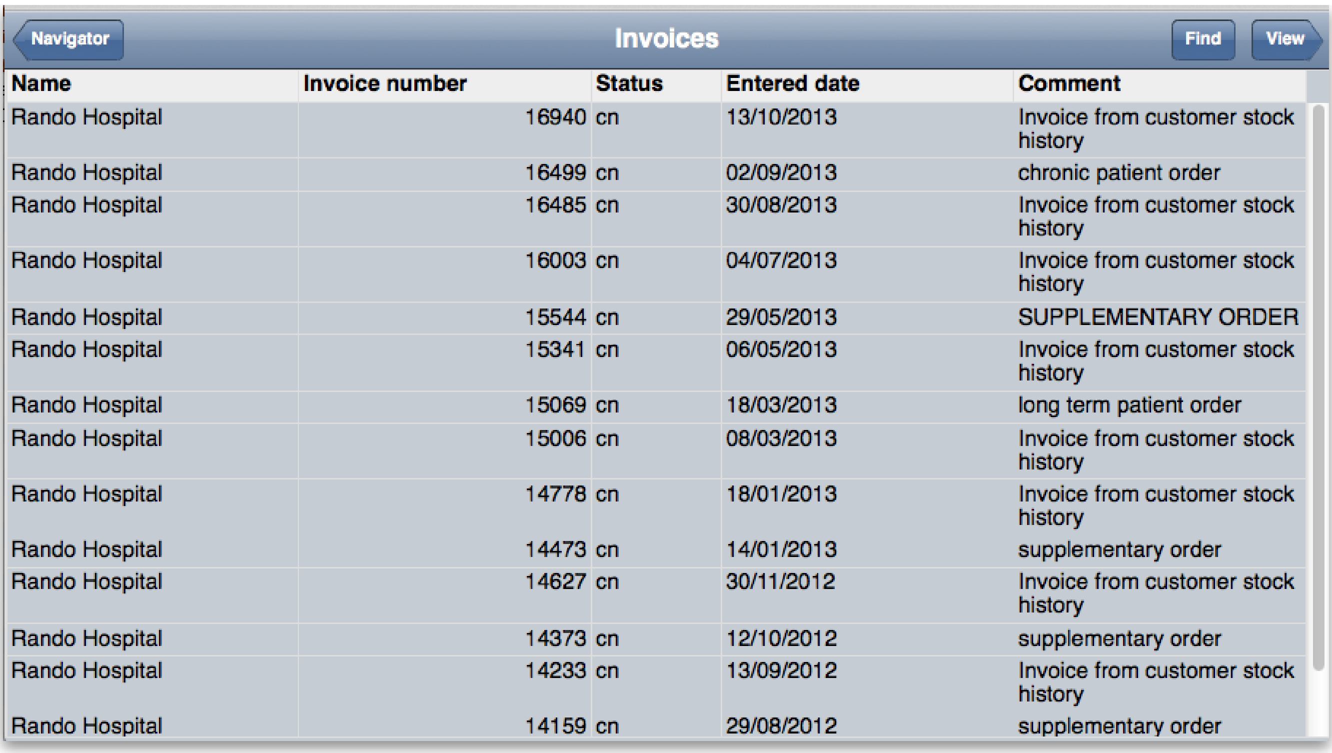


Tap on:

- 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.

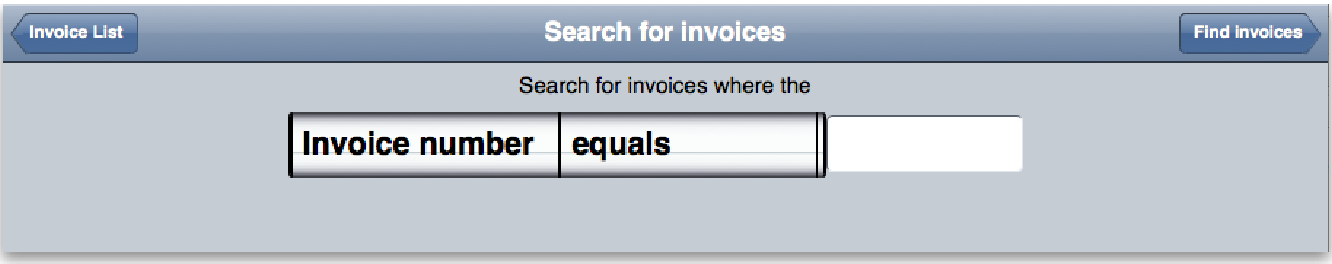
Show Processed Invoices

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



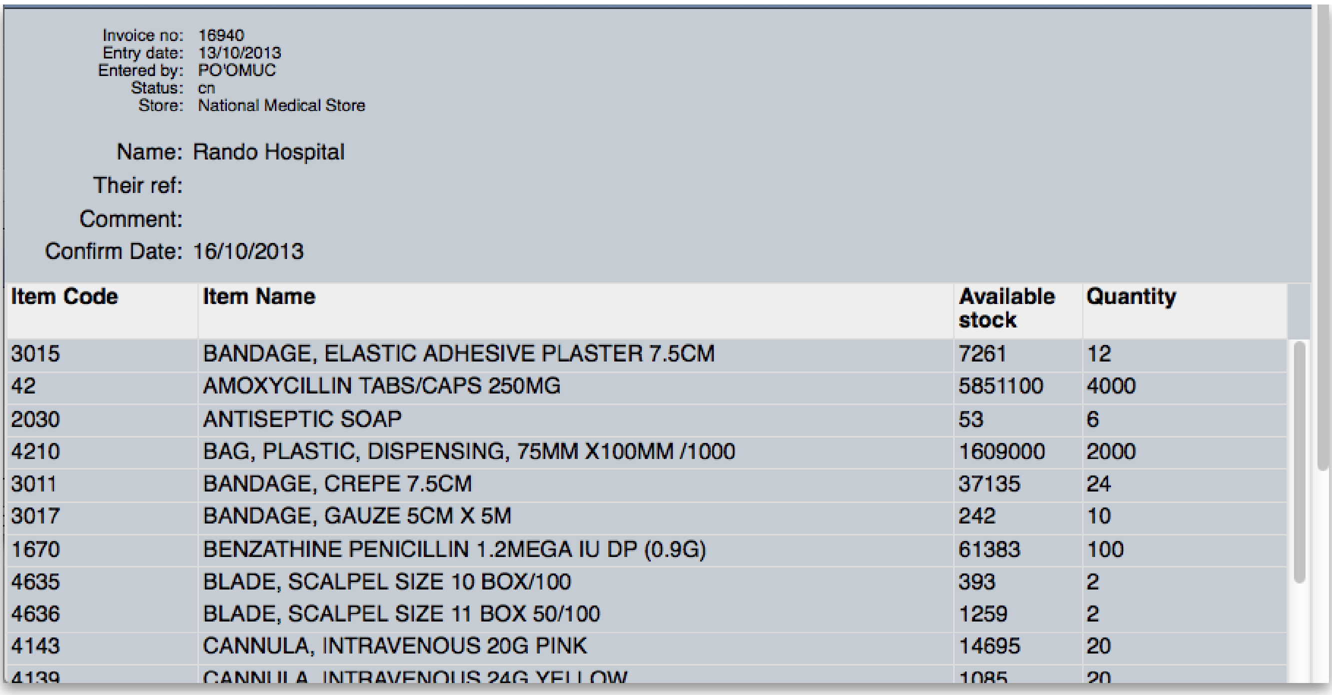
Name	Invoice number	Status	Entered date	Comment
Rando Hospital	16940	cn	13/10/2013	Invoice from customer stock history
Rando Hospital	16499	cn	02/09/2013	chronic patient order
Rando Hospital	16485	cn	30/08/2013	Invoice from customer stock history
Rando Hospital	16003	cn	04/07/2013	Invoice from customer 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:



View Invoice details

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



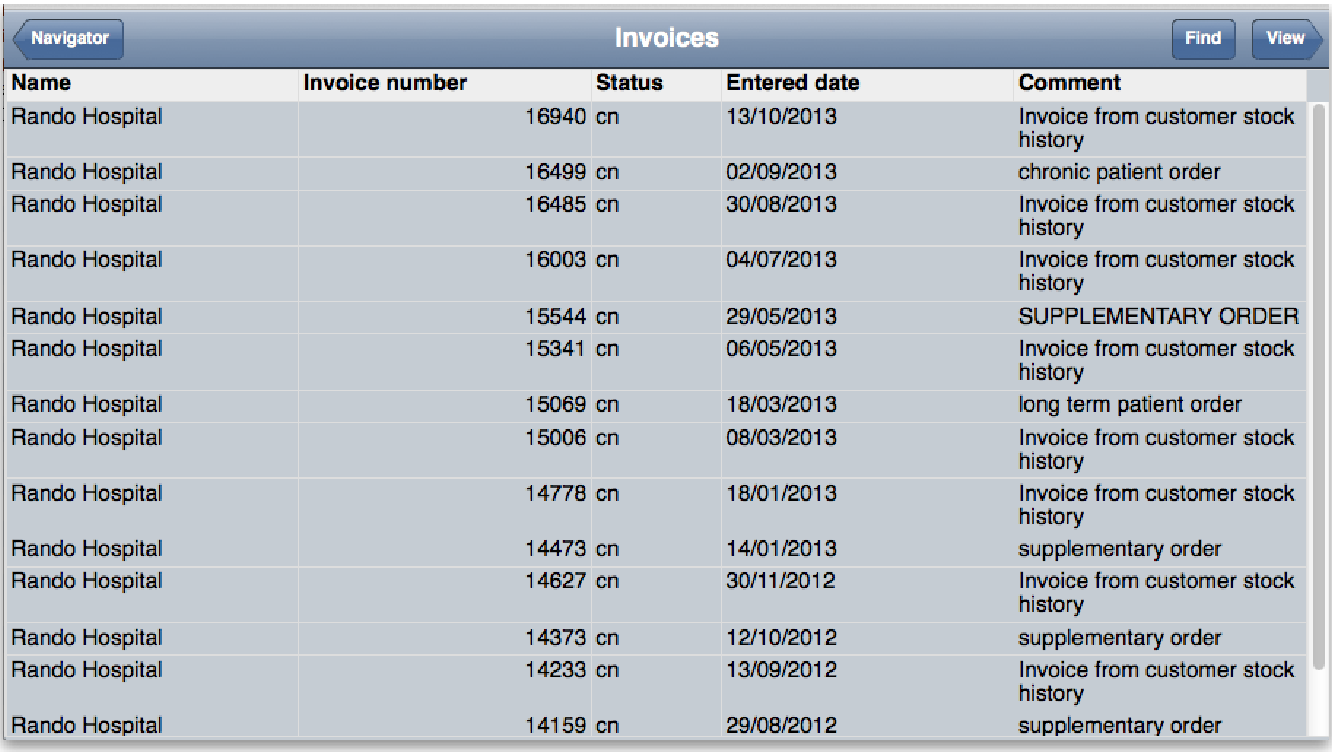
Item Code	Item Name	Available stock	Quantity
3015	BANDAGE, ELASTIC ADHESIVE PLASTER 7.5CM	7261	12
42	AMOXYCILLIN TABS/CAPS 250MG	5851100	4000
2030	ANTISEPTIC SOAP	53	6
4210	BAG, PLASTIC, DISPENSING, 75MM X100MM /1000	1609000	2000
3011	BANDAGE, CREPE 7.5CM	37135	24
3017	BANDAGE, GAUZE 5CM X 5M	242	10
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).



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
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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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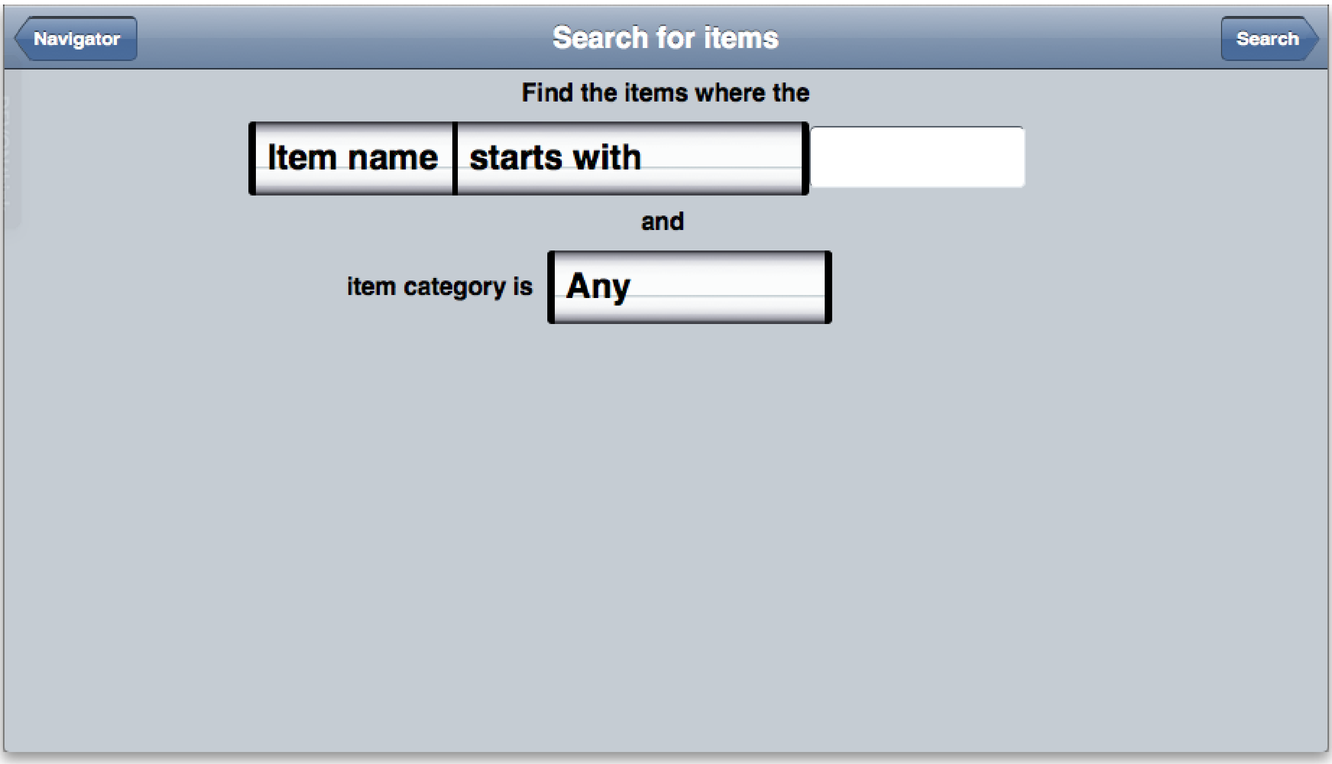
Show Items

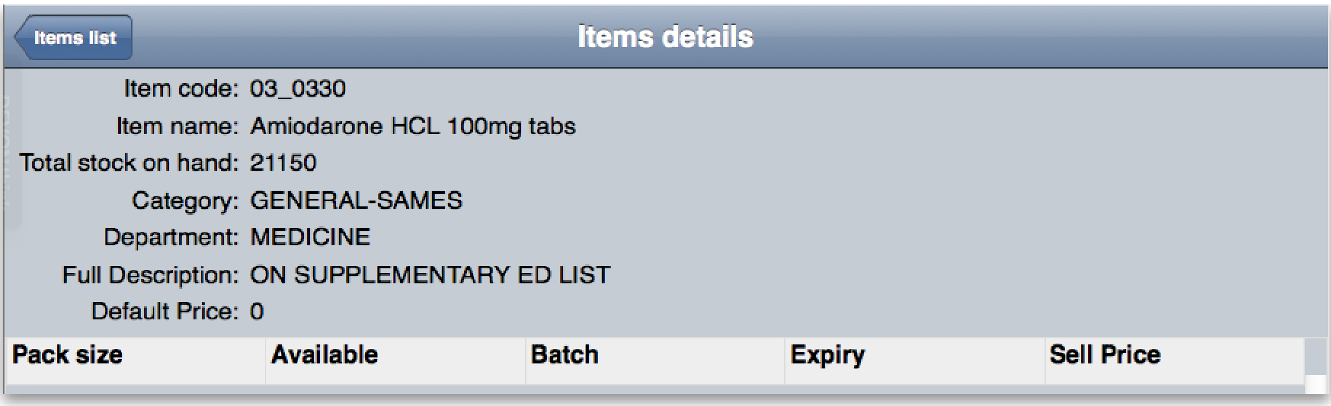
Tap “Show Items” to make a search of invoices on the basis of items. It will display the window as shown below.



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

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 & Electrolites (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

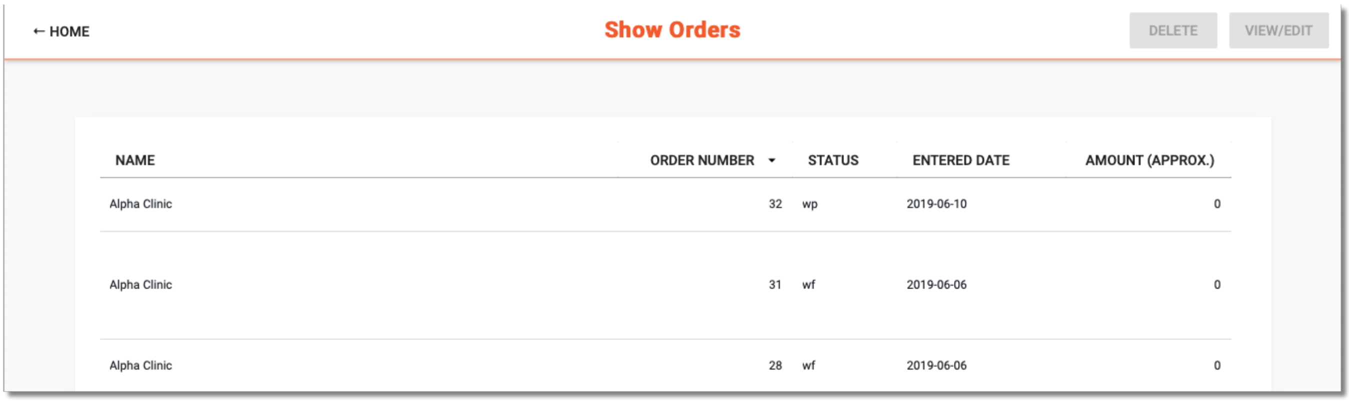
By tapping the row of a specific item details are shown..



(Back up to The navigator)

Show Orders

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



To view or edit an existing order, tap on the order's row to highlight it, then tap on **View/Edit order**

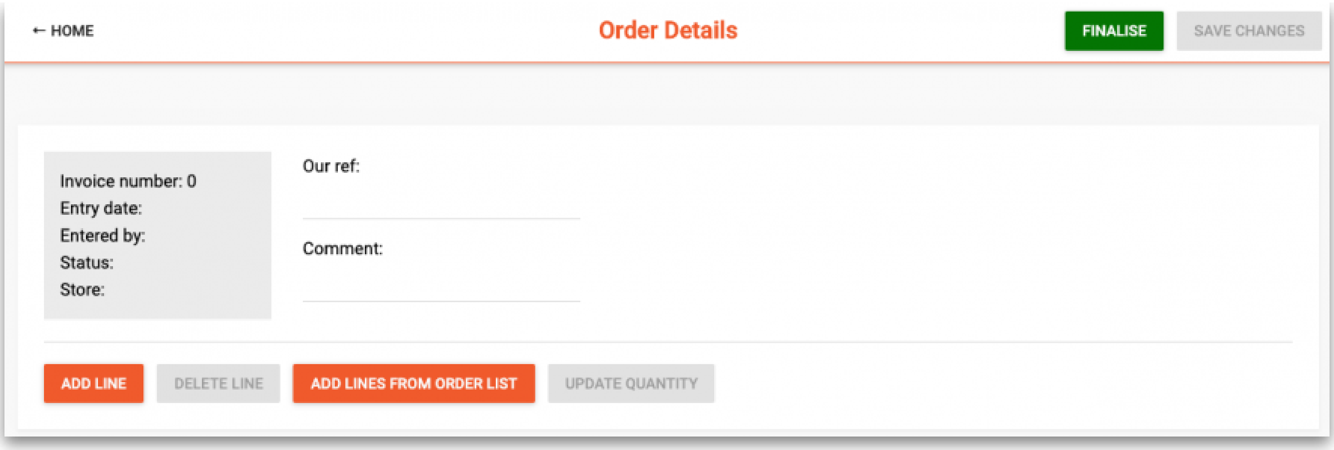
To delete an existing order, tap on the order's row to highlight it, then tap on **Delete order**

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

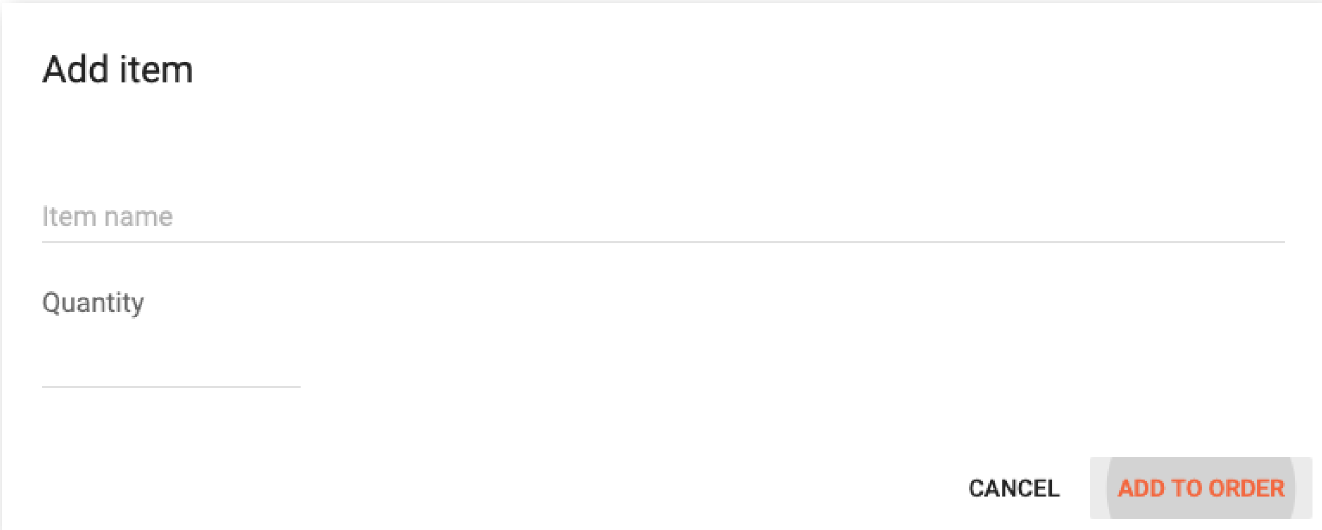
(Back up to The navigator)

Create Orders

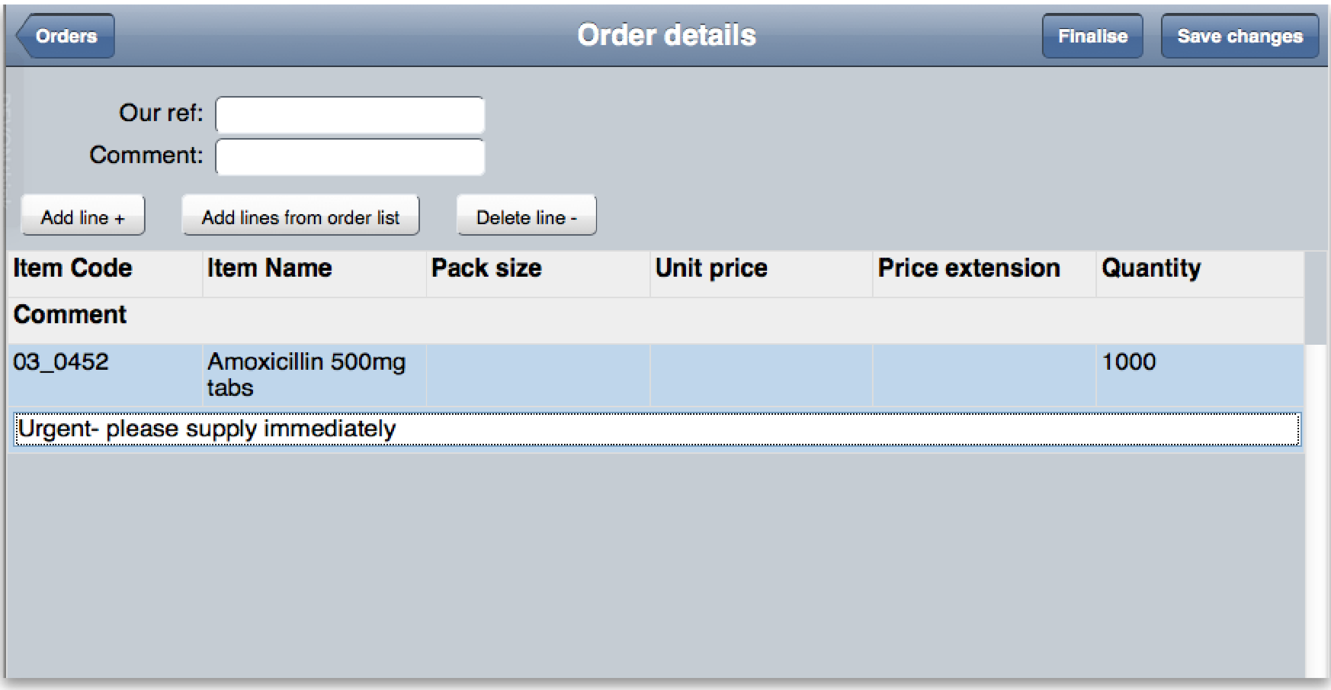
Tap on “Create Order” to display a screen for entering your order.



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



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:



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>

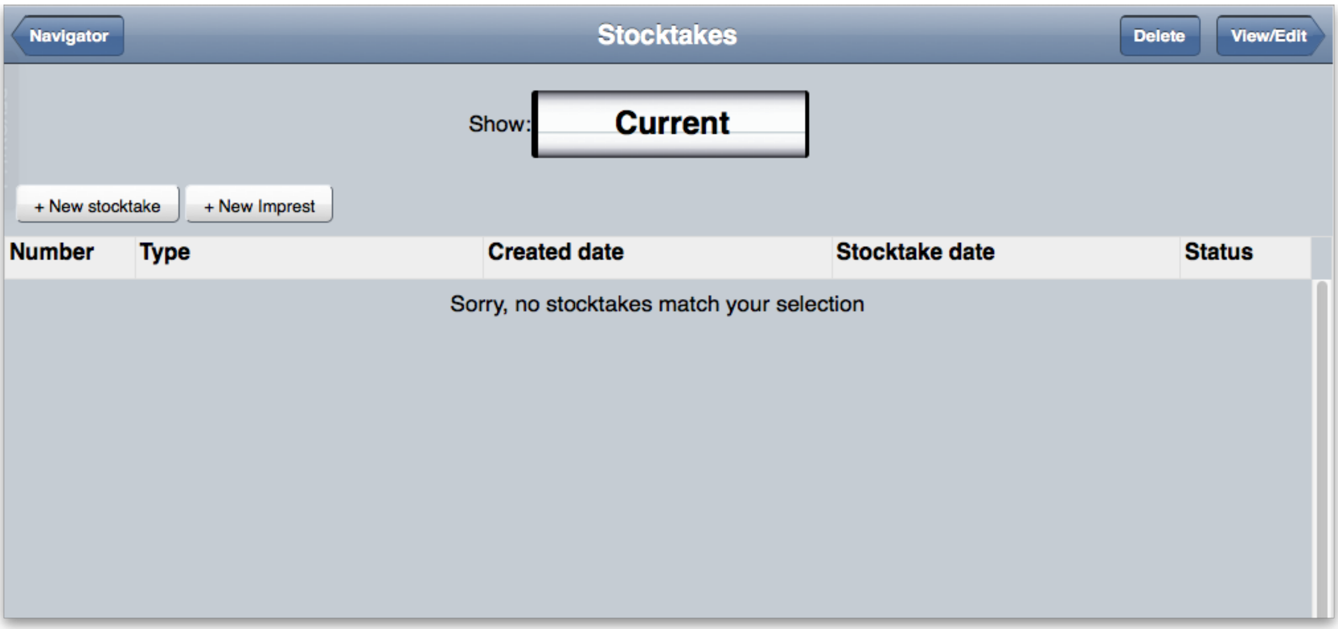
The list will be displayed in the same order as was specified when setting up the list in mSupply.

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 😉

(Back up to The navigator)

Show Stocktakes

Tap *Show Stocktakes* and the stocktakes that have already been initiated will be displayed:

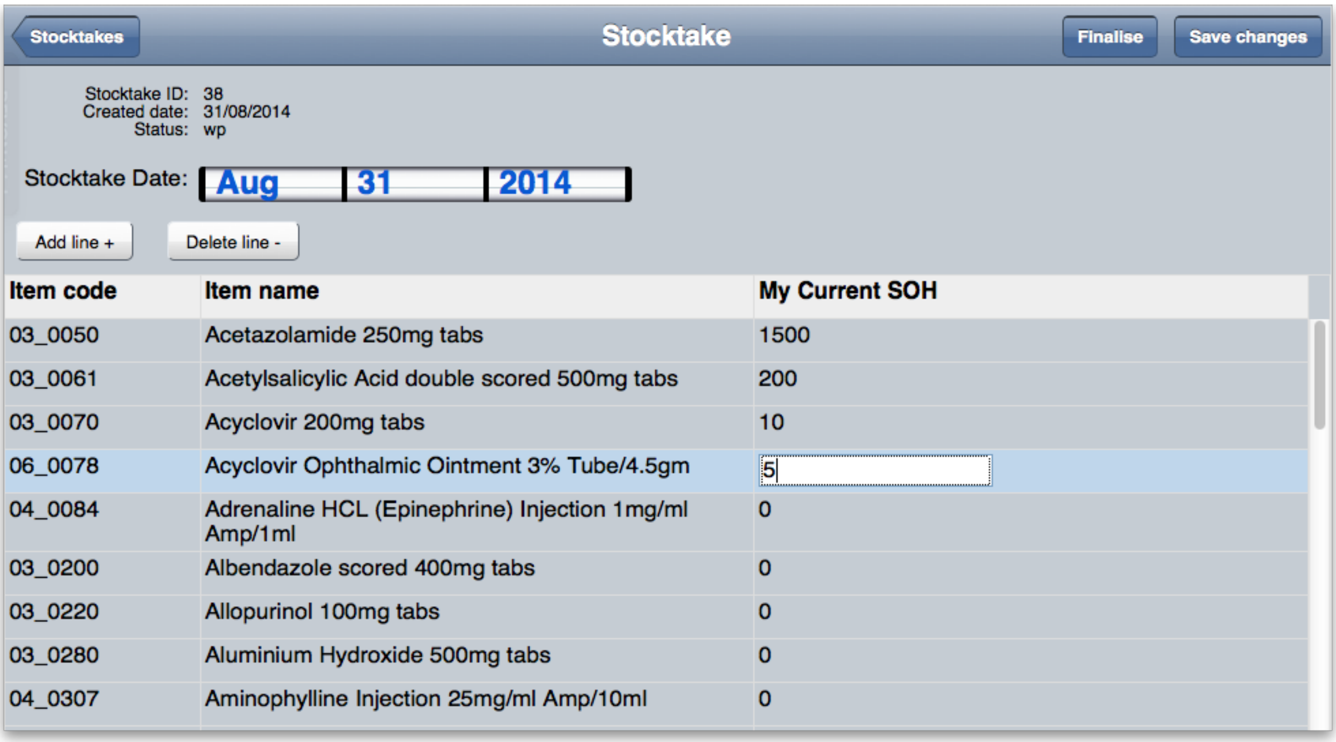


The stocktakes feature is useful to those users at a central supply facility who are responsible for managing orders from a number of remote facilities based on the stock levels in those facilities.

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.

By clicking either of the **New stocktake** or **New imprest** buttons you are presented with a screen showing the items you carry in stock, but with quantities of `0`.

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



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.

(Back up to The navigator)

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.