The Web Stocktake module

*

Using this module you can use a portable device (a tablet or laptop for example) to do your stocktakes as you walk around your store.

1) Log in

- When you log in you need to choose “mSupply user” and then enter the user name and password you use to login to the mSupply desktop application:



- Choose **stocktake** and click **OK**



2) Select the stocktake you want to use

- You will now see a list of available stocktakes (If the list is empty it's because you have no non-finalised stocktakes waiting to be actioned - go to the desktop application and create your stocktake):

You don't **create** stocktakes in the web interface; you do that when you're logged into the mSupply desktop application. The web interface is for filling out stocktake quantities.



- Double click anywhere on the line of stocktake you want to enter quantities for (or single click on it and click on the edit icon). This will open the stocktake and show all the items in it, ready to have their quantities entered:



3) Enter stock quantities

- As you physically count the stock items in your store you can enter the quantities against each item in 2 ways (refer to the screenshot above):
  1. Double click anywhere on the item line and type in the quantity.
  2. Click on the item and click on the **Edit** button, then enter the quantity.

- Remember, you only need to enter quantities where the quantity of an item you count in your store is different from the number shown in the stocktake.

<note important>IMPORTANT: Remember to press the tab key or click on another item line after you have entered the last item's quantity (i.e. before you click on the **Close** button), otherwise the last quantity you entered will not be remembered.</note>

- To make it easier to find the item you want to enter a quantity for, you can do 2 things (again, refer to the image above):
  1. Click on the column headers (Code, Item, Batch etc.) to sort the items according to that column. Sorting by location could be particularly helpful if your items are stored in sequentially labelled locations. Note that clicking on column headers again toggles them between sorting in an ascending and descending order.
  2. Search for the item by typing the start of the item's name in the search box and clicking on the magnifying glass icon. Note that you can also search by location or batch the same way. Simply click on the **Search By Item** button and click on location or batch, as shown in the screenshot below:



- When you have entered a new quantity, mSupply adds a little red triangle to the top left of the quantity's cell as a handy visual reminder of the values you've updated since you last clicked on the **Close** button:



- Finally, when you've entered all the quantities you need to, press the tab key to move away from the last quantity you entered and click on the **Close** button. You will be taken back to the list of stocktakes where you can open another to enter quantities for that or logout (You can of course make changes to the stocktake you've just entered until it is finalised on the client if you need to)
- To finalise the stocktake and have mSupply create all the inventory adjustments you must return to you desktop copy of mSupply. See the 'Create inventory adjustments' section on this page for instructions on how to do this.

Final word

If someone makes changes to the stocktake you are working on, using the desktop copy of mSupply (e.g. adding or removing items), you will not see them reflected in your web copy of the stocktake until you close it (by tabbing out of your last entered quantity and clicking on the **Close** button) and re-open it (by double clicking on it in the list).

WARNING: For security reasons there is a timeout in operation on all mSupply web pages. This means that after a certain period of inactivity (time between key presses or button clicks) you will automatically be logged off. Any work that you have not saved at this point will be lost. For a stocktake, your work is saved when you click on the **Close** button. So don't leave a stocktake half done, walk away for half an hour to have a cup of coffee or do your make-up. Tab out of your last quantity entry and Click on the **Close** button before you go. When you return simply log in again, open up the stocktake you were working on and continue where you left off. You have been warned!

// Previous: The mSupply Web Server Next: mSupply Mobile//

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

Permanent link:
https://docs.msupply.org.nz/web_interface:stock_takes?rev=1458774491

Last update: **2016/03/23 23:08**