25.10. Tips and tricks

mSupply Client: Connecting to a different server

It is unusual, but you may be in a situation where your mSupply client application needs to switch between more than one mSupply Server.

Launch the mSupply client application by double-clicking on the mSupply client icon, then immediately hold down the **Alt** key until the mSupply Server connection dialog box appears:

lonnection to 4D Server		×
Welcome to 4D v13 Recent Available Custom		
Servers		
mSupply	USER-PC	^
mSupply	SUSSOL	
mSupply	SUSSOLW764-PC	
		~
Display this dialog at next startup	,	
	Cancel	

If you tick the **Display this dialog at next startup** tick-box, this dialog box will automatically be displayed on startup of the mSupply client application, and you will not need to do the double-click, **Alt** routine described above.

There are three ways of selecting the mSupply server to connect to. These are accessed via the tabs: **Recent**, **Available** and **Custom**:

1/8

Recent tab

lo Connection to 4D Server	×
Welcome to 4D v13	
Recent Available Custom	
Recently used servers	
^	
×	
Uisplay this dialog at next startup	
Cancel OK	

The **Recent** tab retains a list of all mSupply servers recently used. The list is sorted by alphabetical order. To connect to a server from this list, double-click on its name or select it and click the **OK** button.

Available tab

lonnection to 4D Server		×
Welcome to 4D v13 Recent Available Custom		
Servers		
mSupply	USER-PC	^
mSupply	SUSSOL	
mSupply	SUSSOLW764-PC	
		×
☑ Display this dialog at next startup	Cancel	OK

The mSupply Server includes a built-in TCP/IP broadcasting system that publishes by default the name of the mSupply Server databases available over the network. These names are listed on the **Available** tab of the connection dialog box.

This list is sorted by order of appearance and is updated dynamically. To connect to a server from this list, double-click on its name or select it and click the **OK** button.

Computer networks can be configured to stop dynamic publication of the database name on the network. In this case, you will need to manually configure the the connection on the **Custom** tab.

Custom tab

log Connection to 4D Server	×
Welcome to 4D	v13
Recent Available Custom	
Name and Address of a pu	blished 4D Server:
Database Name:	msupply
	ex: accounting
Network Address:	192.168.1.2
	ex: accounting.company.com or: 192.121.122.123 or : 192.121.12.3:8858
Force the update of the	local resources
🗹 Display this dialog at next sta	rtup
	Cancel OK

The **Custom** tab allows assigning a published server on the network using its IP address and database name.

Database name: allows defining the name of the mSupply Server database.

Network address: allows entering the IP address of the machine where the mSupply Server was launched. If two servers are operating simultaneously on the same machine, the IP address must be followed a colon and port number, for example: 192.168.92.104:19814.

By default, the publishing port of a mSupply Server is 19813. This number can be modified in the **Database Settings...** under **Client-server** tab of mSupply server.



Once the server details have been entered, clicking the **OK** button will connect you to the server.



If you tick the **Force the update of the local resources** tick-box, it allows you systematic updating of the local resources on the client machine when it connects. As a rule, updating of the local resources is automatic on the remote machine each time it



connects, when the structure of the database has been modified between two connections. Most of the time, this option is unnecessary. Nevertheless, in certain specific cases, it may be necessary to force the update.

Emptying out a store and starting again...

Sometimes, the actual stock situation in a store becomes so out of step with mSupply's records that you want to start again from scratch with a brand new stocktake.



To do this, you will need to:

- Confirm or delete all customer invoices with status = nw (New) or sg (Suggested). This should remove from stock all lines that have been made unavailable, but are still showing as in stock see figure below.
 - 1. Click on **Customer**
 - 2. Click on Show Customer Invoices
 - 3. Click on **By Status**
 - 4. Click on All new and suggested
 - 5. Double-click on the first displayed invoice
 - 6. Click on **Confirm** (or, if you want to delete the CI, delete each of the lines, and then Click on **Delete**)
 - 7. Click on OK & Next
 - 8. Repeat steps f & g until all invoices are confirmed (or deleted).

the mSupply navig	gator											82						
	•		2	Cus	ston	ner invoice											ſ	x
			1	2	N	ame DS TE	OUTPATIENT			Cor	nfirm date :	00/00/00				Colour	Black	
V 🐨	V	60	`	_	Their	r ref		0012	_							Invoice : 2,6	12	
Customer	Suppliers	Item		0	omr	ment					Category	None		\sim	Ent	ry date : 25	/01/2017	
															Goods red	eive ID: 0		
	te Transactions list			_	_		R.					_	-	_		Status : sg		
				•	÷,		<u> </u>					1	6		Ente	ered by : su	ssol	
	<u> </u>			Nev	v lin	e i	Delete line(s)					History	-	Confirm		Store: CP	HI	
	Find Sum	Order by Print		Gene	ral	Summary by	tem Summary	by Batch Tran	sport details Lo	g						0.010. 01		
d	Types	Name	1															-
	Customer Invoices 5	DS TB OUTPATIENT		N L	LI	Location		Item Name		Quan	Pack Size	Batch	Exp date	Sell Price	P	rice exten		
	Supplier Invoices	DIAGNOSTIC CLINIC			1	BIOHAE	Tube, Blood Co	ll, Vac, 13x75mm	, 3.0ml, Plasti	10) 1	20150901	30/09/2	0.00			0.00	^
	Inventory adjustments																	
	Supplier credits																	
*2	Customer credits																	
Customar at	Builds																	
history	Repacks																	
	S rind																	
	By Statue																	
	A All new and suggested																	
	Confirmed																	
	Finalized			_	_										-			~
	My transactions			Ŧ.	i) 🗾 🚈			Other charges	item:						mount:	0.	.00
Data Pile: P	My custom filters														S	ubtotal:	0.	.00
A															(Tetel	0.	.00
💦 sussol																rotai.	0.	00
日				Hok	d													~
L			Ē	Fina	alise		Export batcl	n: O					OK&N	lext	Delete	OK		۲

- 2. Empty the mSupply store of all stock by means of an Inventory Adjustment based on an mSupply stocktake of all stock in the store
 - 1. Create the stocktake see figure below.
 - 1. Click on Item
 - 2. Click on **Stocktakes**
 - 3. Click on **New stocktake**
 - 4. Click **OK** (accept default filter values which includes all stock)

• mSupply pavigator					23
Customer	Suppliers	l Lem	Reports	Special	Admin
items (te stocktake list.	New blank stock take	Delete stock take Stock Stock	r: Current	
:			Item filter Search for items whose Item code	starts with ↓ ✓	
			and v	VEN category is Department is	Don't Care V
Stocktakes Sto			And Expiry date Randomly select	is on or before v	00/00/00 🔳
日 ペ sussol 早				Сал	се 4 ОК

- 2. Set all actual quantities to zero (0) see figure below.
 - 1. Click once on the first stock line. The whole line will become highlighted.
 - 2. Click once on the value in the 'Enter Quantity' column. The Enter Quantity value will become highlighted
 - 3. Type 0, then press **Tab**. Repeat this for each line of the whole stocktake. You should be able to be faster than 2 stock lines per second, maybe a lot faster. At 2 stock lines per second, you can get through 1000 stock lines in less than 10 minutes...

3. Click on **Create Inventory adjustments** If you've got a lot of stock lines, this could take a while...

				_					
Descriptio	n 25/01/2017	Stock take				Sto	ck take key 88		
Comment				Stock take entered date 25/01/2017					
Stock take dat	e 25/01/2017	7		_		Stock	take status iso		
							inte ethice og		
New line	Delete line(s)	Print Create Inventory adjustments Order	by		Iter Search by it	n Name or Co em name and	de d code Find		
General Log	1	•							
Lin Location	Item code	Item name	Batch	Expiry	Snapsh	Pack Size	Enter Quantity		
1 Hae	791601	Boule Quintus, 5-part Diluent, 201 (EBOS 1.	1501-399	31/01/2017	2	1	2 0		
2 Hae	791602	Boule Quintus, 5-part Lyse, 51 (EBOS 150	. 1504-430	30/06/2019	1	1	0		
3 Hae	791603	Boule Quintus, 5-part Stopper, 1I (EBOS 15.	1504-388	31/12/2016	1	1	• •		
4 F3	178015	Immunocomb HIV 1/2, 100 tests	150120	30/04/2016	5	1	35		
5 F3	178015	Immunocomb HIV 1/2, 100 tests	150204	31/05/2016	3	1	3		
6 A1	176796	Lopinavir 100mg + Ritonavir 25mg, Dual Co.	E443256	29/02/2020	25	60	25		
7 B2	176791	Lopinavir 100mg + Ritonavir 25mg, Dual Co.	H45-876	31/10/2017	20400	60	20400		
8 B1	176791	Lopinavir 100mg + Ritonavir 25mg, Dual Co.	H45-876	31/10/2017	34	36000	34		
9 F1	733004	Rapid Diagnostic Test (RDT) for Troponin-1.	90AD14003	30/06/2016	1	1	1		
10 F3	733004	Rapid Diagnostic Test (RDT) for Troponin-1.	20141202	31/12/2016	3	1	3		
11 F1	732404	SD Bioline Dengue IgG/IgM, Kit	11DDA036A	31/10/2017	1	1	1		
12 BIOHAE	743201	Tube, Blood Coll, Vac, 13x75mm, 3.0ml, Pla.	20150901	30/09/2017	53	1	53		
<							>		
	S								
Locked	Save Sort of	order					ОК		

3. Import new stock as described in Importing items & stock

Creating customers that are not visible to all the stores

In a multi-store system, you will often be wanting to create new customers that are visible in only one store. By default, when new customers are created, they will be made visible to all stores in the system. If you actually want these new customers to be visible to only one store, you will need to edit the store visibility for that customer, and un-tick the visibility for all the other stores - a tedious exercise in a system with scores or hundreds of stores!

For this reason, there is a solution: There is a store preference called **Names created in this store not visible in other stores**. To use it:

- 1. Edit the store preferences for the store that needs to be able to see the new customers and turn on the **Names created in this store not visible in other stores** store preference.
- 2. Make sure that you have user permission to create customers in this store.
- 3. Log in to the store
- 4. Create the new customers



... or import the customers - refer Importing Names

Previous: 25.09. Imprest work flow | | Return to: mSupply User Guide Home Page

From:

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

Permanent link: https://docs.msupply.org.nz/faq:tipsandtricks?rev=1584420228



Last update: 2020/03/17 04:43