# **28.10.** 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 mSupply	USER-PC SUSSOL	^							
mSupply	SUSSOLW764-PC								
		>							
✓ Display this dialog at next startup									
	Cancel	ок							

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**:

#### **Recent tab**

less Connection to 4D Server	×
Welcome to 4D v13	
Recent Available Custom	_
Recently used servers	
^	
~	
Display 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	ОК
		.:

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**

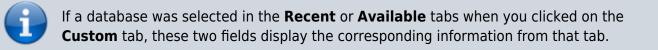
log Connection to 4D Server	×						
Welcome to 4D	v13						
Recent Available Custom							
Name and Address of a published 4D Server:							
Database Name:	msupply						
	ex: accounting						
Network Address:	192.168.1.2						
	ex: accounting.company.com or: 192.121.122.123 or : 192.121.12.3:8858			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

Be warned: Following the procedure below will result in the stock lines losing all **Cost price** data. Cost price data can be added back to the stock lines, but that is ordinarily a slow process that will not necessarily get back the correct Cost prices. But, you are only doing this because the mSupply

record is so desperately inaccurate anyway...

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).

mSupply navig	jator		_								53				
		=	<b>2</b> • C	usto	mer invoice										
			2	1	Name DS TE	OUTPATIENT			Con	firm date :	00/00/00			Colour	Black
<b>b</b> ja	V	e <sup>6</sup> 0		The	eir ref		0012	_						Invoice : 2,612	
Customer	Suppliers	Item		Соп	ment					Category	None		$\sim$	Entry date : 25/01/2	017
ſ														Goods receive ID: 0	
	Transactions list	Order by Print	N	ew li	ne	Delete line(s)	ov Batch Transp	ort details Loo			Mistory	6	Confirm	Status : sg Entered by : sussol Store: CPHL	
0	Types	Name		_					-						
ĭ	Customer Invoices 5	DS TB OUTPATIENT	N.,		Location		Item Name		Quan	Pack Size			Sell Price	Price exten	
	Supplier Invoices	DIAGNOSTIC CLINIC		1	BIOHAE	Tube, Blood Coll,	Vac, 13x75mm, 3	.0ml, Plasti	10	1	20150901	30/09/2	0.00		0.00
	Inventory adjustments														
$\sim$	Supplier credits														
+~)	Customer credits														
	Builds														
Customer st history	Repacks														
	♀ Find														
	By date By Status														
	3 By Status 4 All new and suggested														
	Confirmed														
	Finalized														
7	My transactions		-		] 🗾 🐔			Other charges	Item:					Amount:	0.
Data File: P	My custom filters													Subtotal:	0.
n en. 📗														0 % tax:	0.
Sussol														Total:	0.
2					e	Export batch:	0					7 OK&N	lext	Delete OK	

- 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)

the mSupply navigator	•		
Customer	Suppliers	1 Lem	Reports Special Admin
items		-	ke Delete stock take Show: Current Shok take date Status Select items to stock take ×
2			tem fiter Search for items whose  tem code  tem code  Category is  and  VEN category is  Don't Care
Stocktakes	Stock		and     ✓     Department is     Don't care       And     Stock location     equals     ✓       And     Expiry date     is on or before     00/00/00       Randomly select     0     items from returned list.
南 m えい 見			Cancel 4 OK

- 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 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...

	Description		Stock take		Stock take key 88					
	Comment	t				Stock take er	ntered date 25/01/20			
Sto	ock take date	25/01/2017			_				Stock	take status sg
New		Delete line(s)	Print	Create Inventory adjustments	Order by	y			n Name or Co tem name and	
	al 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		1	20
2	Hae	791602	Boule Quintus,	5-part Lyse, 51 (Ef	BOS 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			<b>•</b> •
4	F3	178015	Immunocomb H	IV 1/2, 100 tests		150120	30/04/2016	5	1	35
5	F3	178015	Immunocomb H	IV 1/2, 100 tests		150204	31/05/2016	3	1	3
6	A1	176796	Lopinavir 100m	ng + Ritonavir 25mg	, Dual Co	E443256	29/02/2020	25	60	25
7	B2	176791	Lopinavir 100m	ng + Ritonavir 25mg	, Dual Co	H45-876	31/10/2017	20400	60	20400
8	B1	176791	Lopinavir 100m	ng + Ritonavir 25mg	, Dual Co	H45-876	31/10/2017	34	36000	34
9	F1	733004	Rapid Diagnost	tic Test (RDT) for Ti	roponin-1	90AD14003	30/06/2016	1	1	1
10	F3	733004	Rapid Diagnost	tic Test (RDT) for Ti	roponin-1	20141202	31/12/2016	3	1	3
11	F1	732404	SD Bioline Deng	gue IgG/IgM, Kit		11DDA036A	31/10/2017	1	1	1
12	BIOHAE	743201	Tube, Blood Co	ll, Vac, 13x75mm, 3	3.0ml, Pla	20150901	30/09/2017	53	1	53
<			1			1	1			>
										-
		<b>~</b>	1							
		_	J							

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

# Changing an item's name and pack size

There may come a time when you decide that you need to change the name and pack size of an item.

For example, Malaria RDTs (Rapid Diagnostic Tests) are commonly packed in packets with 25 tests in each pack. The packs can not really be broken down further in the supply chain, and it will only be opened at the last mile service delivery point. Therefore you made a decision to define this item as:

#### Rapid Diagnostic Test (RDT) for Malaria, Pack/25 with a default pack size of 1.

This works fine until your Malaria Programme team have advise you that they prefer to count the individual test in such a way that it matches the number of patients that need to be tested. If they need enough tests for 750 people, they want to order 750 of this item, not 30 (750/25). Therefore, you decide that you need to change the name and pack size of this item to:

Rapid Diagnostic Test (RDT) for Malaria with a default pack size of 25.

- Changing the Item name and pack size is the easy bit. The challenge is that all existing stocks need to be recounted with resulting inventory adjustments.
- If your system is of any substantial size, you will want to consult with stakeholders to plan a smooth transition.
- After a change, such as this, all historic issuance / AMC records will be 25 time *less* than future issuance AMC records

### Changing the item

If the item is currently described as:

tem details	Item name Rapid Diagnostic Test (RDT) for Malaria, Pack/25 Item code 732401 Pricing	
	In this example, the Item code = 732401. The code is often an easier way to select the item.	
https://docs.msupply.org.nz/	Printed o	on 2025/06/28 00:20

Edit the item (you will need user permissions to do this) to:

Item name	Rapid Diagnostic Test (RDT)	for Malaria, Pack
Item code	732401	Pricing

On the Storage tab, replace the **Preferred pack size** of 1 with 25

General	Item name Rapid Diagnostic Test (RDT) for Malaria, Pack	Stor
Storage		0.01
Misc	tem code 732401	
Usage	Defeuil	
Stock	Default	
Ledger	Default shelf location	
Quotes	Preferred pack size 25 + Outer pack size 0	
Backorders		
Notes	Volume per pack 0 m3 Outer pack volume 0 m3	
Reconcile	Weight per pack 0 kg	
Bill of materials		

Click **OK** 

### Carry out stock takes and inventory adjustments

🕵 Stocktake list

Create a New stock take for Item code starts with 732401:

ł	New stoc	1 k take Ne	ew blank stoc	k take Delete	stock take		Show:	(
9	ID		Descri	ption		Stock take da	te	1
14	_	elect items m filter	to stock take	<u></u>			×	
	1	Search for Item code	tems whose ~	starts with	~	732401		
		and	~	Category 1	∨ is			
		and	~	VEN categor	/ is	Don't Care	~	

This reveals that there are **58** packs in the store with pack size = **1**:

2	Stock take sheet									
	Description	Item 732401	pack size change							
	Comment									
	Stock take date	21/06/2021								
	New line Dele	te line(s)	Print Create Inventory adjustments	Order by					Search by	iter
	Line Location	Item code			Batch		Snapshot	$\sim$	Enter Quantity	
	1 M14.06.2A	732401	Rapid Diagnostic Test (RDT) fo	or Malaria, Pack	MR19K64	31/03/2022	58		) 5	58

To correct this, we need to:

- 1. Add a New line
- 2. 732401 <Tab>
- 3. Select the line of the existing stock line (see that the Stock on hand = 58)
- 4. Click on the button to use details of this existing stock line
- 5. Set stock take qty = 58
- 6. Set Pack size = 25
- 7. Set Stock stock location to the same as the existing stock line
- 8. Click Add new

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Description Item 7	732401 pack size chang	e						
Comment								
Stock take date 21/06	/2021							
		· <b>T</b> .						
lew line Delete line(s	s) Print Creat	te Inventory	Order by					
A 11 - 1 - 1 - P	- 4							
Add stocktake lines								
Item Rapid Diagnostic	Test (RDT) for Malaria,	Pack 2			Black			
			Total stock fo	r this item: 58				
Existing stock lines								
Batch	Expiry	Pack size	Cost price	Sell price	Stock on hand	Location		
				-				
MR19K64	31/03/2022		0	0		M13.09.1A		^
MR19K64 MR19K64	31/03/2022		0	0		M14.06.2A M09.01.3A		
MR19K64 MR19K64	31/03/2022 31/03/2022		0	0	-	M09.01.3A M14.06.2A		• 1
75006205	28/02/2022		0	0	-	M14.06.2A		
75006205	28/02/2022		0	0		M14.06.2A		
75006205	28/02/2022		0	0		M14.06.2A		
35000005	20/00/2022							Y
						Add	checked	
New stock line								
Stock take qty	5 58	]						
	6 25	,				2		
Pack Size	6 25	]					ils of line d above	
Batch M	R19K64	]				SCIECLE	a above	
Expiry date 31	/03/2022			Cost Price	0.00	12 month	average	
and and a second								
Location M	14.06.2A 7	2		Sell Price	0.00			

With the resulting stock take:

- 1. We give the stock take a useful title
- 2. We update the **Enter Quantity** details of the the original stock line to 0
- 3. Carry out a stock count to ensure that the stock on the shelves matches the newly added line and make any necessary adjustments in the **Enter Quantity** column.
- 4. Click the **Create Inventory adjustments** button to finalise the stock take.

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