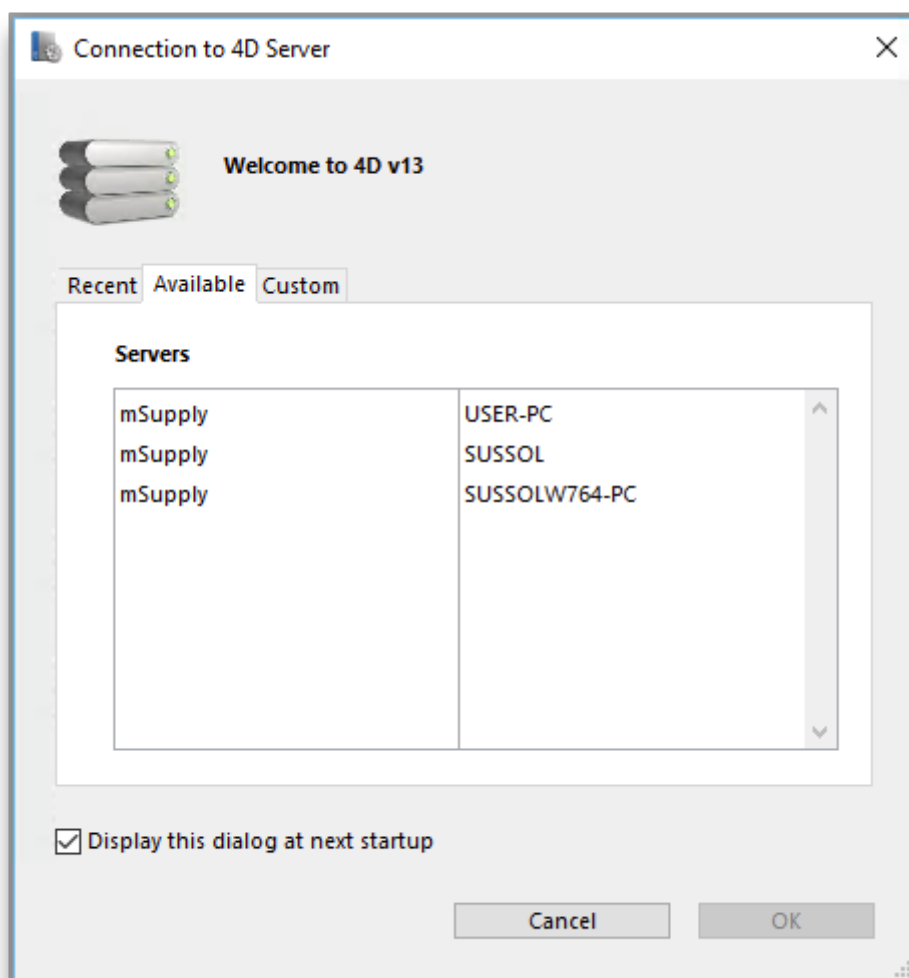


28.10. Tips and tricks

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.

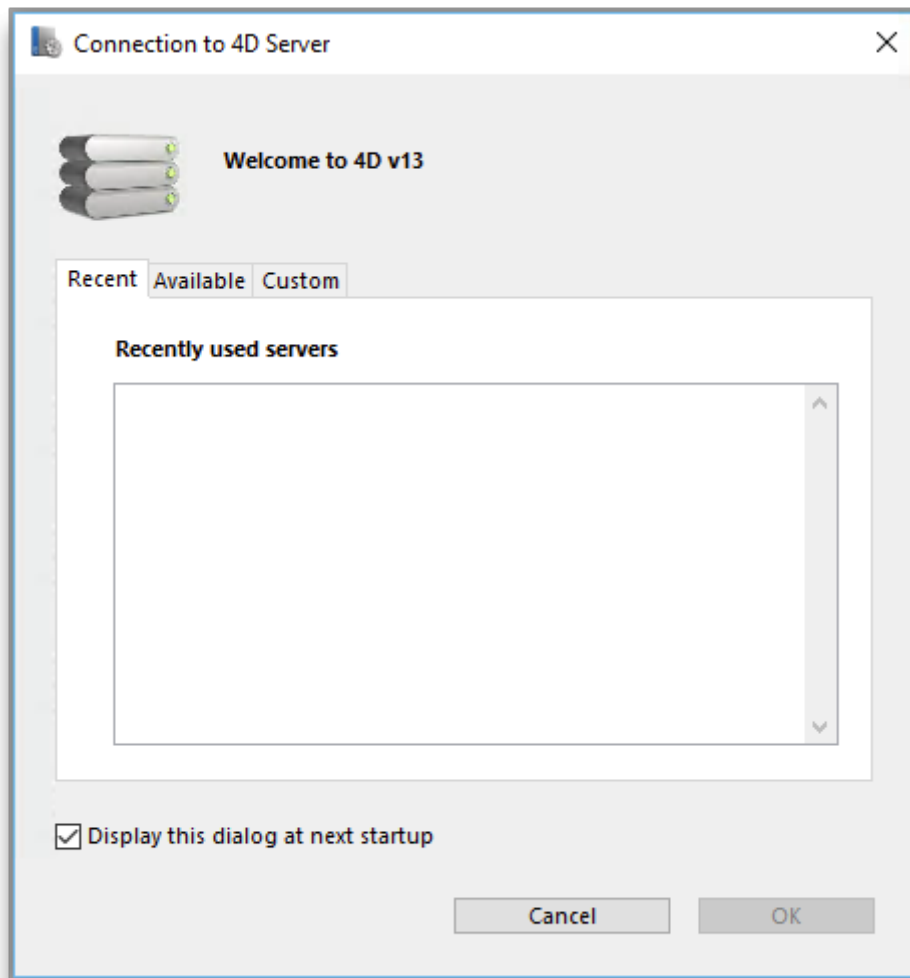
Launch the mSupply client application by double-clicking on the mSupply client icon, then immediately hold down the **Alt** key until the mSupply Server connection dialog box appears:



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.

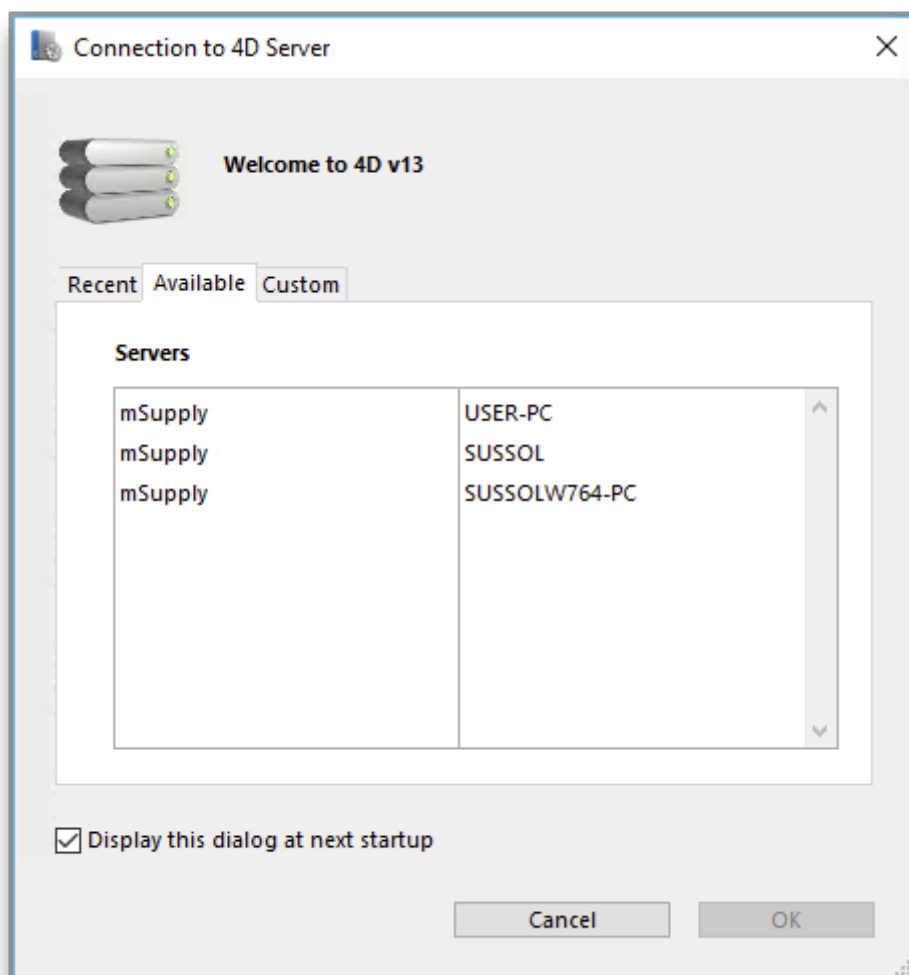
There are three ways of selecting the mSupply server to connect to. These are accessed via the tabs: **Recent**, **Available** and **Custom**:

Recent tab



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



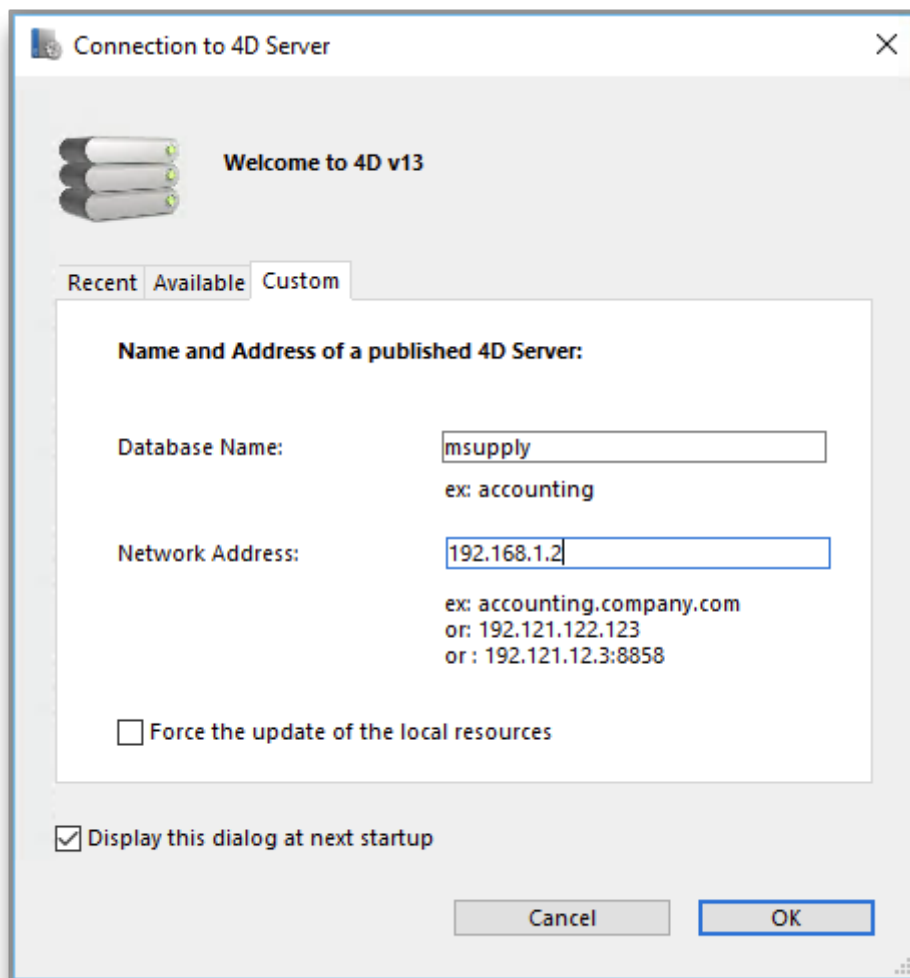
The mSupply Server includes a built-in TCP/IP broadcasting system that publishes by default the name of the mSupply Server databases available over the network. These names are listed on the **Available** tab of the connection dialog box.

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 connection on the **Custom** tab.

Custom tab



Connection to 4D Server

Welcome to 4D v13

Recent Available Custom

Name and Address of a published 4D Server:

Database Name:
ex: accounting

Network Address:
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.



If a database was selected in the **Recent** or **Available** tabs when you clicked on the **Custom** tab, these two fields display the corresponding information from that tab.

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.



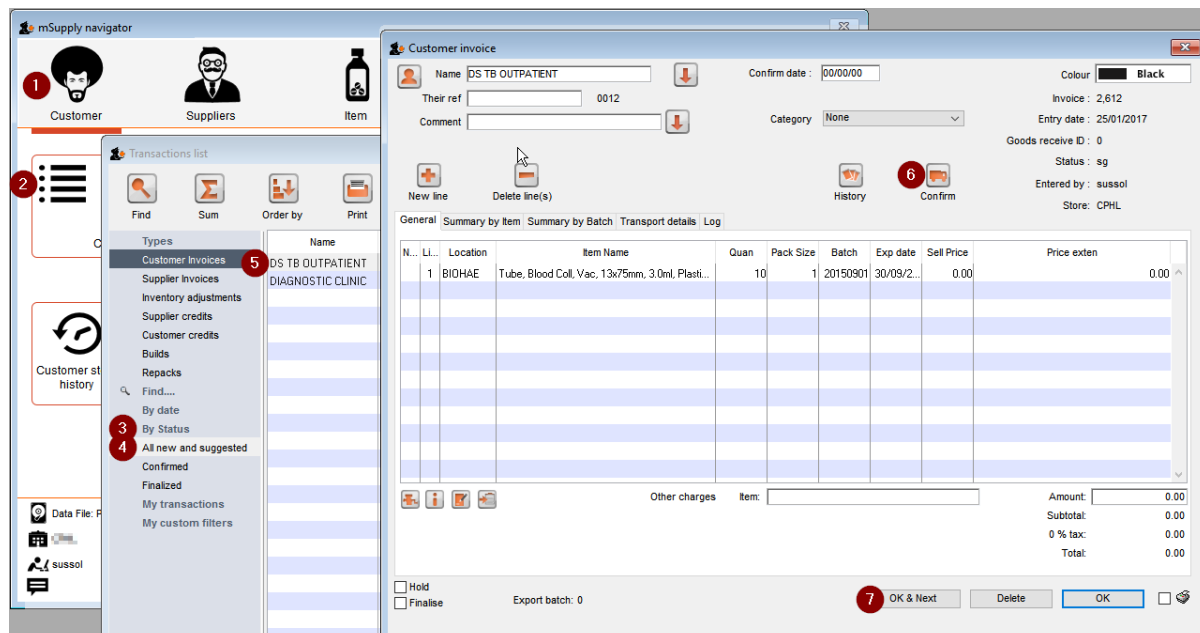
Be warned: Following the procedure below will result in the stock lines losing all **Cost price** data. Cost price data can be added back to the stock lines, but that is ordinarily a slow process that will not necessarily get back the correct Cost prices. But, you are only doing this because the mSupply

record is so desperately inaccurate anyway...



To do this, you will need to:

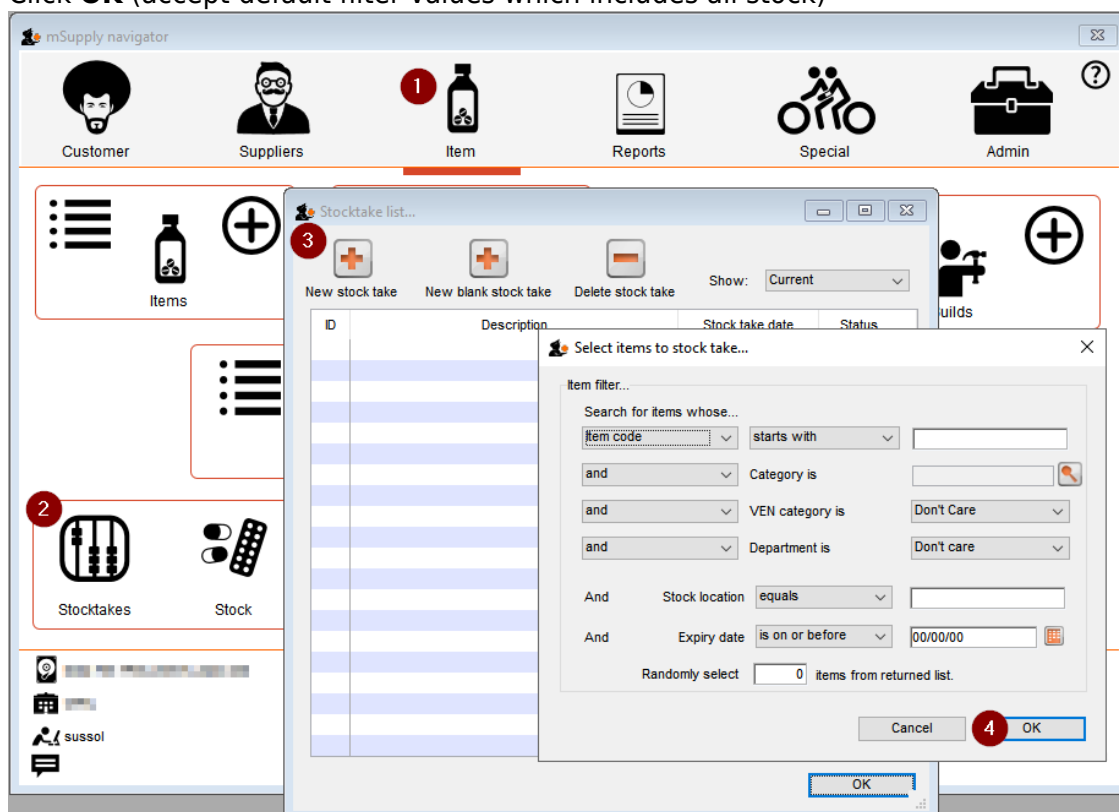
1. Confirm or delete all customer invoices with status = nw (New) or sg (Suggested). This should remove from stock all lines that have been made unavailable, but are still showing as in stock - see figure below.
 1. Click on **Customer**
 2. Click on **Show Customer Invoices**
 3. Click on **By Status**
 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).



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)



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...

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

Lin...	Location	Item code	Item name	Batch	Expiry	Snapsh...	Pack Size	Enter Quantity
1	Hae	791601	Boule Quintus, 5-part Diluent, 20l (EBOS 1...	1501-399	31/01/2017	2	1	0
2	Hae	791602	Boule Quintus, 5-part Lyse, 5l (EBOS 150...	1504-430	30/06/2019	1	1	0
3	Hae	791603	Boule Quintus, 5-part Stopper, 1l (EBOS 15...	1504-388	31/12/2016	1	1	0
4	F3	178015	Immunocomb HIV 1/2, 100 tests	150120	30/04/2016	5	1	5
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

- 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:

- [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](#).
- Make sure that you have [user permission](#) to create customers in this store.
- Log in to the store
- 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:

Item details

General
Storage
Misc

Item name: Rapid Diagnostic Test (RDT) for Malaria, Pack/25

Item code: 732401

Pricing

... with a pack size of **1**.



In this example, the Item code = 732401. The code is often an easier way to select the item.

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

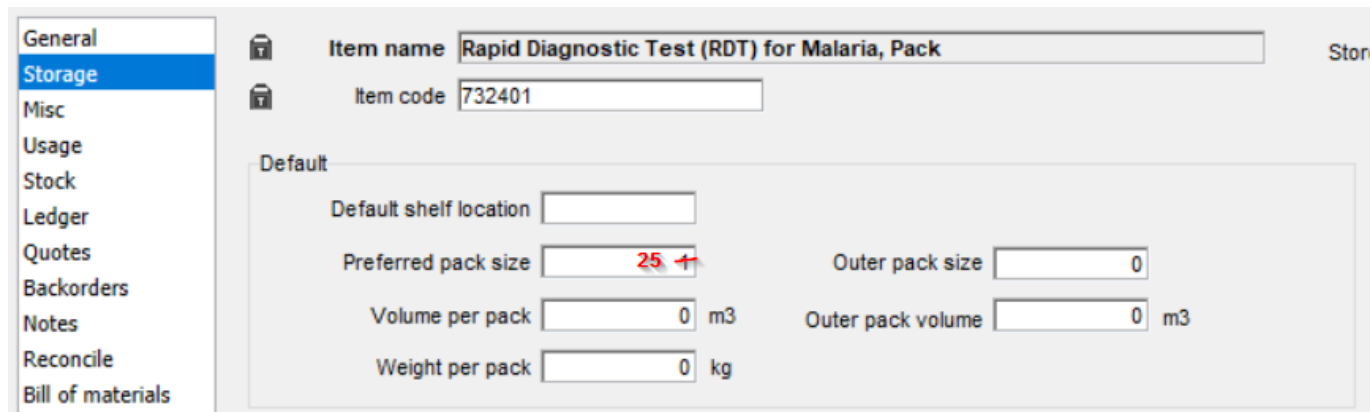


Item name **Rapid Diagnostic Test (RDT) for Malaria, Pack**

Item code **732401**

Pricing

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



General
Storage
Misc
Usage
Stock
Ledger
Quotes
Backorders
Notes
Reconcile
Bill of materials

Item name **Rapid Diagnostic Test (RDT) for Malaria, Pack**

Item code **732401**

Default

Default shelf location

Preferred pack size **25**

Outer pack size **0**

Volume per pack **0** m3

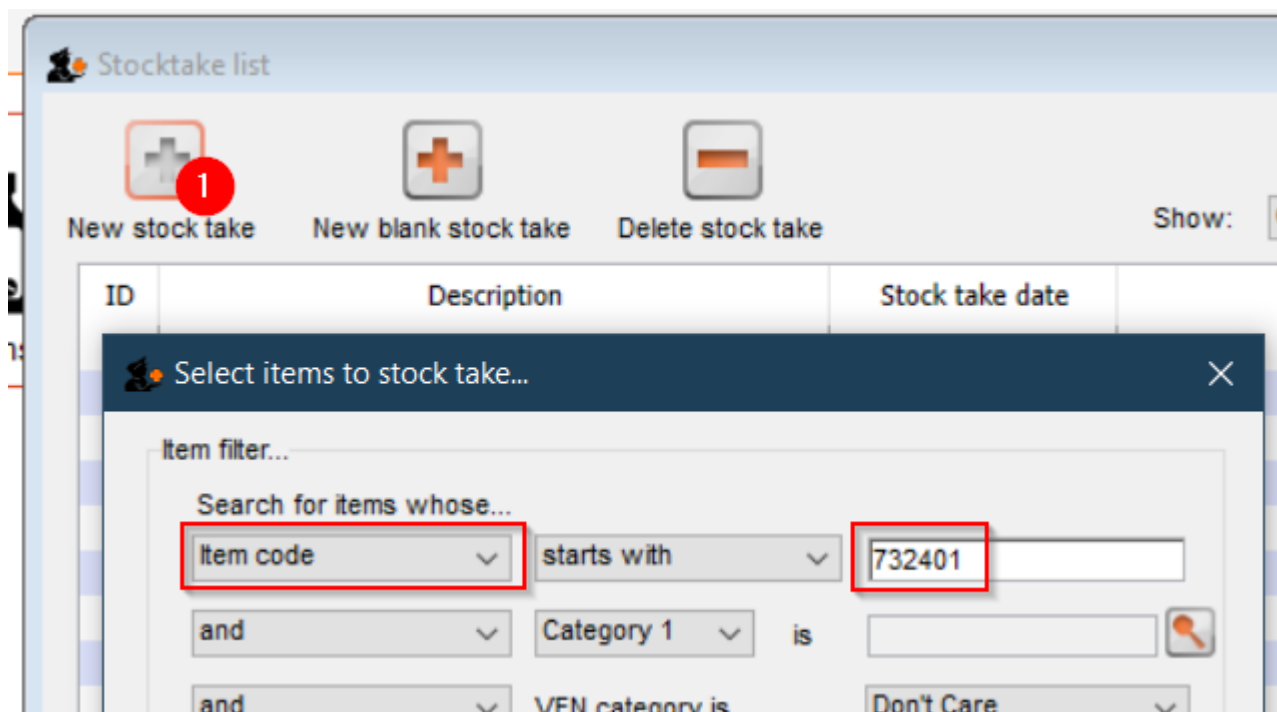
Outer pack volume **0** m3

Weight per pack **0** kg

Click **OK**

Carry out stock takes and inventory adjustments

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



Stocktake list

New stock take New blank stock take Delete stock take Show: C

ID	Description	Stock take date
----	-------------	-----------------

Select items to stock take...

Item filter...

Search for items whose...

Item code starts with 732401

and Category 1 is

and VEN category is Don't Care






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

Stock take sheet...

Description

Comment

Stock take date

New line Delete line(s) Print Create Inventory adjustments Order by

Search by item

General Log

Line	Location	Item code	Item name	Batch	Expiry	Snapshot...	Pack Size	Enter Quantity
1	M14.06.2A	732401	Rapid Diagnostic Test (RDT) for Malaria, Pack	MR19K64	31/03/2022	58	1	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**

Stock take sheet...

Description:

Comment:

Stock take date:

 **1** New line
  Delete line(s)
  Print
  Create Inventory adjustments
  Order by

Add stocktake lines


Item: **2** Black

Total stock for this item: 58

Existing stock lines

Batch	Expiry	Pack size	Cost price	Sell price	Stock on hand	Location	<input type="checkbox"/>
MR19K64	31/03/2022	1	0	0	0	M13.09.1A	<input type="checkbox"/>
MR19K64	31/03/2022	1	0	0	0	M14.06.2A	<input type="checkbox"/>
MR19K64	31/03/2022	1	0	0	0	M09.01.3A	<input type="checkbox"/>
MR19K64	31/03/2022	108	0	0	0	M14.06.2A	<input type="checkbox"/>
75006205	28/02/2022	25	0	0	0	M14.06.2A	<input type="checkbox"/>
75006205	28/02/2022	25	0	0	0	M14.06.2A	<input type="checkbox"/>
75006205	28/02/2022	1	0	0	0	M14.06.2A	<input type="checkbox"/>

3 **58**

4 


Add checked


New stock line

Stock take qty: **5**

Pack Size: **6**

Batch:

Expiry date: 

Location: **7** 

Donor:

Cost Price: ☐ 12 month average

Sell Price:

8 Add new

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.

Stock take sheet...

Description **1**

Comment

Stock take date

 New line
  Delete line(s)
  **3** Print
  **4** Create Inventory adjustments
  Order by

Search by

General **Log**

Line	Location	Item code	Item name	Batch	Expiry	Snapshot...	Pack Size	Enter Quantity
1	M14.06.2A	732401	Rapid Diagnostic Test (RDT) for Malaria, P...	MR19K64	31/03/2022	58	1	2 0 58
2	M14.06.2A	732401	Rapid Diagnostic Test (RDT) for Malaria, P...	MR19K64	31/03/2022	0	25	58

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