8.07. Stock control methods for your customers (requisitions)

Stock supply philosophy

mSupply is designed for situations such as a central supply facility within a country or region, or within a hospital where the supply of stock to customers is controlled by the supplying facility. That is, supply of stock to customers is managed by the supplying store.

Regardless of who controls the supply of stock, it needs to be made principally on the basis of information about the customer's anticipated usage. mSupply has several ways of arriving at quantities to be supplied to customers, in rough order of sophistication:

- If there is **NO** information from the customer about item usage (AMC) or stock levels, then the supplying store can only 'push' stock to the customer by Creating a new Customer Invoice with quantities derived from some other sources.
- If the customer has sent an 'order' or 'requisition' for stock, containing just the quantities of each item required, then the supplying store can at least be informed by these quantities when preparing the Customer Invoice.
- The imprest method is common in hospitals where the customer can provide the current Stock on Hand (SoH) and there is a long and relatively stable track record of item consumption, from which 'Imprest values' have been calculated manually, outside of mSupply.
- The stock history method is similar to the imprest method, but lets mSupply calculate the 'imprest values' automatically.
- Response requisitions is more accurate method for cases where the assumptions required for the imprest and stock history methods are not correct.
- Full Entry of Request & Requisition Forms by the Supplying Facility is an enhancement to the standard response requisition method. This feature was developed for Côte d'Ivoire but can be activated for any country on request.

With the exception of the 'Push' method, collectively, these are grouped together as different types of **requisition**. When editing an item, you can view all types of requisition records for that item. More information is available on the requisitions page (if you can think of better names, please tell us!).

Please note that it is possible for all of these to be done by programme if required - see the 4.05. Programs page for details.

Defining the list of items to be included in the re-supply

The lists of items that a customer can receive can be dfined by master lists.

See the 4.04. Item master lists page for information on managing master lists and see the Assigning a list to a customer section for how to assign a master list to a customer.

Viewing existing requisitions

Choose *Customer* > *Show requisitions...* from the menus or click on the Requisitions icon on the Customers tab of the Navigator:



This window will open, showing you a list of the requisitions already in the system:

New req	customer uisition	New customer stock history	Delete	Finali	se			Show All
D	Name		Date entered	Requisition date	Status	Туре	Authorisation status	Comment
15	Test store		10/05/2023	10/05/2023	sg	response	pending	From request requisition3
14	Test store		10/05/2023	10/05/2023	sg	response	pending	From request requisition2
12	Cross River State Warehouse		03/04/2023	03/04/2023	cn	response	none	
11	Bayelsa State Warehouse		03/04/2023	03/04/2023	fn	response	none	
10	Cross River State Warehouse		03/04/2023	03/04/2023	fn	response	none	
9	Edo State Warehouse		03/04/2023	03/04/2023	fn	response	none	
8	Benue State Warehouse		03/04/2023	03/04/2023	fn	response	none	
- 4	Test store		24/03/2023	24/03/2023	fn	response	none	From request requisition1

Columns in the table:

- **ID:** Unique identifier of the requisition.
- Name: The name of the customer the requisition has been entered for.
- **Date entered:** The date the requisition was first saved in mSupply.
- **Requisition date:** The date the requisition as given by the customer.
- Status: The status of the requisition (sg, cn, or fn nomally, web requisitions can also be wf or

wp).

- **Type:** The type of requisition; *sh* for customer stock history, *im* for imprest or *response* for a response requisition.
- **Comment:** The comment entered on the requisition.

Buttons and fields in the window:

- Show drop down list: Use the Show drop down list to filter the requisitions by status.
- **Search** field: If the list of requisitions is too long to find a particular requisition you are interested in then you can type something in the **Search** field. If you type anything in the **Search** field, only requisitions with a customer name, requisition number, program or comment that contain what you typed will be displayed.
- New XX buttons: To create a new requisition of a particular type (see below), click on the appropriate 💽 button a new, blank window will open ready for you to enter the requisition.
- **Delete** button: To delete a requisition, click on it in the list to select it then click on the **Delete** button. You will be asked to confirm the deletion before it is carried out. **Please note:** You cannot delete a requisition if a customer invoice has been created from it mSupply will tell you if this is the case. You can still delete the requisition but you must delete the customer invoice first.
- **Finalise** button: This button allows you to finalise multiple requisitions at once. Simply highlight a selection of requisitions in the list and click on the button. Only Confirmed status requisitions will be finalised; requisitions of any other status will be ignored. After finalisation has been carried out you will be told how many were successfully finalised and how many couldn't be updated because they weren't confirmed or because they were in use by someone else.

To edit a particular requisition, double-click on it in the list. A window will open, populated with the requisition's details; the window will be different depending on the type of requisition (see sections below).

Stock history method

The theory behind the stock history method (sometimes referred to as the Historical Logistics Method) is based on the assumption that future customer usage will be similar to historic usage.

We can calculate the customer's average usage over time if we know their stock levels at two points in time, and what stock they received from us in that intervening period. We assume that this average usage rate will continue over the coming supply period.

There are three more variables that need to be estimated:

- The number of months in the coming supply period
- The lead time required to supply them (that is, the time lag between the customer doing a stocktake in order to trigger re-supply, and receipt of the stock)
- The number of month's worth of buffer stock they need

With this data, the calculation is like this:

- A = Stock on hand on date1
- B = Amount supplied to customer between date1 and date2
- C = Stock on hand on date2

- D = Quantity used in period between date1 and date2 = A+B-C
- E = number of months between date1 and date2
- F = Usage rate = D/E
- G = Number of months in coming supply period
- H = Number of buffer stock months desired
- I = Lead time (months) between date2 and delivery of stock
- $J = Amount to supply = F^*(G+H+I)-C$

Using the stock history method:

- A and C are reported by the customer on date1 and date2 respectively
- B is calculated by mSupply based on mSupply records
- G, H and I are entered by the user
- D, E, F and J are calculated by mSupply

mSupply uses stock issued by the supplying store to arrive at the parameter B.

Obviously, if the customer has received goods from other sources during the calculation period, B will be inaccurate!

First stocktake record

In order to calculate the usage rate, mSupply requires stock on hand figures of the items on the list recorded on an earlier date (date1) = A, above. This becomes the *initial stock history record*.

To create such a record, follow the procedure described below for entering a stock history, noting particularly, the following:

- 1. Enter the date as the correct date at the time the stocktake was performed.
- 2. Ignore the figures that automatically appear along each row, except for the *Their current stock* column.
- 3. Enter their current stock figures in the *Their current stock* column
- 4. Close the window using the OK button.

Regular use

Once your customer's first stocktake record has been entered, and a period of time has passed with some customer stock usage, re-supply can be be generated on the basis of this usage.

A re-supply using the stock history method needs to be triggered by a customer stocktake. If your customer is set up with mSupply customer web interface, then this process can be initiated by the customer directly, and then completed in the supplying store as described below.

If your customer has not used the mSupply customer web interface to report their stocktake, then their stock data needs to be entered in manually to the supplying store.

Manual entry of customer stock history

To begin the process, choose *Customer* > *Show requisitions*, and the list of any historic customer stock histories is displayed along with the other requisition types. The *Status* column lets you know the status: sg (suggested) or cn (confirmed). The *Type* column shows the stocktake type: im (Imprest), sh (Stock History) or response (Requisition):

				R	equisitio	on list		
New customer regulation	New customer imprest	New customer stock history		Delete	Finalise			Show: Past 30 days
ID Name			Date entered	Requisition date	Status	Туре	Comment	
4 Bike Hospit	al		30/07/2024	30/07/2024	sg	sh		
2 Amnesty He	ospital		30/07/2024	30/07/2024	sg	im		
1 Cactus hos	pital		30/07/2024	30/07/2024	sg	response		
Double click on row	to edit details							ок

Double-clicking on a line will allow you to edit the selected record (provided that you have permission to do so).

With the passage of time, entries on the list will rapidly grow in number, and so mSupply allows you to apply a filter selecting exactly what will be displayed. The default display is for *Suggested*, as these are most likely the ones you will be processing; other options include *All*, *Confirmed*, *Web entries to be processed* - this covers histories submitted via the web customer interface - and *Entered today*

Add new customer stock history

Click the **New customer stock history** button, to display the *Enter new customer stock history…* window:

Last update: 2025/01/20 22:50 issuing_goods:stock_control_methods https://docs.msupply.org.nz/issuing_goods:stock_control_methods

Stock tai	Name ke date 26/08/13		Days between sto	ocktakes 0		Black	ID: 1165 Entry date: 26/08/13
Days to Order Re New line	eceived 26/08/13 Delete line(s)	Create Custom	Previous stock t	ake date 26,08,13		Print	Status : nw Stock Type : sh Entered by : Sussol Store: General
Lin Item code	Item Name	Unit Ou	r SOH Their Old S.	They recei Their curren	Their usage Their daily	Suggested quan	Actual quan
-							
-							
-							
(•
L .	Confirm						
Save Sort Order						Cancel	K & Next OK

Enter the first few letters of customer's name in the *Name* field, then press the *Tab* key to call up the list of customers' names from which the required customer may be chosen. In this example, our customer is Medical Ward.

Once you have chosen a customer, the window is populated with the items that are members of any item lists that:

- Have been assigned to that customer (both master lists and local lists)
- and that have the "Stock history" check box checked for that list

You are presented with this window:

Enter new cust	omer stock history									D
•	Name Medical Ward		W0	2					Blac	k ID: 1172
Stock	take date 30/08/13		Day	s between sto	cktakes 4					Entry date : 30/08/13
Days	to supply 30		Pre	vious stock ta	ke date 26/	08/13				Status : sg
Order	Received 30/08/13									Stock Type : sh
										Entered by: Sussol
<u> </u>	Dalata Erati		•							Store: General
New line	Delete line(s)	reate Cu	istomer invo	ice Key	ent to sugge	sted quan			Print	
Lin Item code	Item Name	Unit	Our SOH	Their Old S	They recei	Their curren	Their usage	Their daily	Suggested quan	Actual guan
1 CAFdr	Chloramphenicol 0.5% eye drop	each	4923	5	15	0	20	5	150	150
2 CAFoint	Chloramphenicol 1% eye oint	each	73	4	0	0	4	1	30	30
3 Salinh	Salbutamol 100mcg/puff aerosol	each	3198	6	12	0	18	4.5	135	135

Fill in customer stock history

The **Our SOH** column is the stock on hand in our own store, while figures in all subsequent columns are the customer's data.

The first entry to be made is in the *Days to supply* field, where the appropriate figure should be entered - e.g. 30 if the ordering frequency is monthly, 90 if it is quarterly, etc.

You will see in our example that

- 29 days have passed since the last stocktake
- The column headed Their old SOH shows their stock on hand at the last stocktake
- The column headed *They received* shows the amounts supplied when their last order was processed
- The column headed *Their current SOH* is the column where the customer's current stock figures (as provided by the customer) are entered. But note that, just as with the imprest method, if the name you entered in the Name textbox is actually another store then this column will be automatically filled in with the current stock in the store saving you a lot of time (you only need to edit those figures where the stock in mSupply does not actually match what's on the store's shelves).
- As figures are entered, mSupply® calculates a suggested quantity to order, and this appears in the *Suggested quan* column. These suggested quantities should be reviewed, and any adjustment entered in the *Actual quan* column to reflect, for example, pack sizes and to ensure that actual quantities match exact multiples of the pack size.

After entries have been made in the column *Their current SOH* the window will look like this:

2		Name Medical Ward		W0.	2					Black	ID: 1169
	Stock	take date 24/09/13		Day	s between sto	cktakes 29					Entry date : 24/09/13
	Days	to supply 30		Pre	vious stock tai	ke date 26/	08/13				Status : sg
	Order	Received 24/09/13									Stock Type : sh
0	-										Entered by : Sussol
Ŀ	•	_		- T -		5					Store: General
New	line	Delete line(s) Cr	eate Cu	stomer Invo	ice Rev	ert to sugge	sted quan			Print	
in	ltem code	Item Name	Unit	Our SOH	Their Old S	They recei	Their curren	Their usage	Their daily	Suggested guan	Actual guan
1	CAFdr	Chloramphenicol 0.5% eye drop	each	4923	5	15	2	18	0.62	17	17
1	CAFdr CAFoint	Chloramphenicol 0.5% eye drop Chloramphenicol 1% eye oint	each each	4923 73	5	15	2	18	0.62	17	17
1 2 3	CAFdr CAFoint Salinh	Chloramphenicol 0.5% eye drop Chloramphenicol 1% eye oint Salbutamol 100mcg/puff aerosol	each each each	4923 73 3198	5 4 6	15 0 12	2 4	18 0 17	0.62 0 0.59	17 0 17	17 0 17
1 2 3 4	CAFdr CAFoint Salinh Salneb5	Chloramphenicol 0.5% eye drop Chloramphenicol 1% eye oint Salbutamol 100mcg/puff aerosol Salbutamol 5mg neb (neb vial)	each each each each	4923 73 3198 31225	5 4 6 3	15 0 12 12	2 4 1 3	18 0 17 12	0.62 0 0.59 0.41	17 0 17 9	17 0 17 9
1 2 3 4 5	CAFdr CAFoint Salinh Salneb5 Haemoint	Chloramphenicol 0.5% eye drop Chloramphenicol 1% eye oint Salbutamol 100mcg/puff aerosol Salbutamol 5mg neb (neb vial) Antihaemorrhoid 30g oint	each each each each each	4923 73 3198 31225 1017	5 4 6 3 11	15 0 12 12 20	2 4 1 3 7	18 0 17 12 24	0.62 0 0.59 0.41 0.83	17 0 17 9 18	17 0 17 9 18
1 2 3 4 5 6	CAFdr CAFoint Salinh Salneb5 Haemoint Clopes	Chloramphenicol 0.5% eye drop Chloramphenicol 1% eye oint Salbutamol 100mcg/puff aerosol Salbutamol 5mg neb (neb vial) Antihaemorrhoid 30g oint Clotrimazole 100mg pessary (6 tab:	each each each each each each	4923 73 3198 31225 1017 11871	5 4 6 3 11 4	15 0 12 12 20 10	2 4 1 3 7 4	18 0 17 12 24 10	0.62 0 0.59 0.41 0.83 0.34	17 0 17 9 18 6	17 0 17 9 18 6
1 2 3 4 5 6 7	CAFdr CAFoint Salinh Salneb5 Haemoint Clopes Glycsup	Chloramphenicol 0.5% eye drop Chloramphenicol 1% eye oint Salbutamol 100mcg/puff aerosol Salbutamol 5mg neb (neb vial) Antihaemorrhoid 30g oint Clotrimazole 100mg pessary (6 tab: Glycerol 2.8g suppos	each each each each each each each	4923 73 3198 31225 1017 11871 556	5 4 6 3 11 4 4	15 0 12 12 20 10 12	2 4 1 3 7 4 2	18 0 17 12 24 10 14	0.62 0 0.59 0.41 0.83 0.34 0.48	17 0 17 9 18 6 12	17 0 17 9 18 6 12
1 2 3 4 5 6 7 8	CAFdr CAFoint Salinh Salneb5 Haemoint Clopes Glycsup Parsup2	Chloramphenicol 0.5% eye drop Chloramphenicol 1% eye oint Salbutamol 100mcg/puff aerosol Salbutamol 5mg neb (neb viai) Antihaemorrhoid 30g oint Clotrimazole 100mg pessary (6 tab: Glycerol 2.8g suppos Paracetamol 250mg suppos	each each each each each each each each	4923 73 3198 31225 1017 11871 556 4780	5 4 6 3 11 4 4 9	15 0 12 12 20 10 12 40	2 4 1 3 7 4 2 14	18 0 17 12 24 10 14 35	0.62 0 0.59 0.41 0.83 0.34 0.48 1.21	17 0 17 9 18 6 12 22	17 0 17 9 18 6 12 22
1 2 3 4 5 6 7 8 9	CAFdr CAFoint Salinh Salneb5 Haemoint Clopes Glycsup Parsup2 Adr1	Chloramphenicol 0.5% eye drop Chloramphenicol 1% eye oint Salbutamol 100mcg/puff aerosol Salbutamol 5mg neb (neb vial) Antihaemorrhoid 30g oint Clotrimazole 100mg pessary (6 tab: Glycerol 2.8g suppos Paracetamol 250mg suppos Adrenaline (Epinephrine) 1mg/ml a	each each each each each each each each	4923 73 3198 31225 1017 11871 556 4780 1977	5 4 6 3 11 4 4 9 16	15 0 12 12 20 10 12 40 20	2 4 1 3 7 4 2 14 8	18 0 17 12 24 10 14 35 28	0.62 0 0.59 0.41 0.83 0.34 0.48 1.21 0.97	17 0 17 9 18 6 12 22 21	17 0 17 9 18 6 12 22 22 21

All that remains is to make adjustments in the *Actual quantities* column, to reflect appropriate pack sizes.

16	Cpzinj	Chlorpromazine S	50m			
17	Dex4	Dexamethasone 4	4mg			
18	DicA	Diclofenac 25mg/	3ml			
•						
	••	Confirm				
Save	Sort Order					

Once you are satisfied, the *Confirm* box (bottom left corner) should be checked, the *Create customer invoice* button should be clicked, and you will proceed to creating the customer invoice, which is the same for all requisition types.

Printing forms

Clicking the **Print** button provides several options for printing forms:



- 1. **Customer stock takes:** This form you can give to the customer (for example, if they are a ward in a hospital that has mSupply running in it's pharmacy store), and they can fill out the quantities they have on hand, and then values are entered into mSupply.
- 2. **Customer stock supply:** This form provides information to give to the customer about the quantity they will be supplied.
- 3. **Customer stock request and issue:** This form provides information for the customer comparing what was requested with what was actually supplied.

The second two reports are for use after you have entered quantities to be supplied into the customer stock history window.

Imprest method

The Imprest method is probably the most commonly understood and used method of stock control, and has been used for many years, probably since before the invention of the computer!

As can be seen by the discussion below, the Imprest method is a simplification of the Stock History method discussed above. We argue that the Stock History method is superior to the Imprest method because it dynamically calculates a number of values based on live customer consumption data, rather than relying on some historic calculation that is likely out of date. It is quite understandable why the Imprest method is the standard approach in hospitals - because it was developed before the computer age, and its hard to change old habits. However, now that you have mSupply ready to do the number crunching, we suggest that you seriously consider using the Stock History

method instead of the Imprest method...



- A = Stock on hand on date1
- B = Amount supplied to customer between date1 and date2

- C = Stock on hand on date2 THE ONLY INFORMATION COLLECTED
- D = Quantity used in period between date1 and date2.
- E = number of days between date1 and date2
- F = Usage rate **PRE-DETERMINED AND FIXED**
- G = Number of days in coming supply period **PRE-DETERMINED AND FIXED**
- H = Number of buffer stock days desired **PRE-DETERMINED AND FIXED**
- I = Lead time (days) between date2 and delivery of stock = ${\bf 0}$

The Imprest Quantity = F*(G+H+I)

• J = Amount to supply = Imprest Quantity -C

If stocktakes are not taken at the pre-determined frequency, and particularly if they are missed, the system will fail. It is a fairly rigid system, in that once set, F, G and H must remain constant. It is frequently used for supplying wards in a hospital setting, where operations are generally more rigidly controlled.

Using the imprest system

The *imprest system* operates in this way:

- The stock of a particular item which a customer (usually a clinic, ward or department) should hold is agreed. This is the **Imprest quantity**.
- A stocktake is carried out at the facility, giving us a **Stock on hand**.
- The amount to be ordered by the facility is calculated as:

Order quantity = Imprest quantity - Stock on hand

For example, take the case of a rural clinic which receives a monthly order from a central store:

- It is agreed that the clinic, when fully stocked, should hold 10,000 paracetamol 500mg tablets. This is the Imprest quantity.
- At the end of a particular month, a stocktake shows that the **Stock on hand** is 2,400 paracetamol tablets.
- To restore the stock of paracetamol tablets to the Imprest quantity, the amount to be ordered is calculated as:

Order quantity = 10,000 (**Imprest quantity**) minus 2,400 (**Stock on hand**) = 7,600

This feature caters for mSupply users who operate an imprest system, where a central store supplies goods on a *regular basis* to a number of customers, who may/may not be mSupply users themselves. We advise that the customers should be provided with a list - perhaps for a 12 month period - of the dates on which they should perform a stock check and submit the figures, ideally on a customised form, to the central store according to the prearranged schedule. It is important to note that the

customer needs to supply only the current stock on hand figures, a relatively simple task; customers are not required to submit details of what they perceive to be order quantities.

It should be remembered that the items to be included in the list and their imprest quantities must be defined for each customer individually. The imprest quantity defined for a particular customer is unique to that customer, and has no bearing on imprest quantities defined for other customers.

Processing the order from the customer

The central store, on receiving the stock on hand details from the customer, selects from the Navigator or Customer menu the item *Show requisitions*, which displays this window:

••	•				R	equisitie	on list		
N	ew customer requisition	New customer imprest	New customer stock history		Delete	Finalise		Show: Past 30	o search
ID	Name			Date entered	Requisition date	Status	Type	Comment	
	4 Bike Hospital			30/07/2024	30/07/2024	sg	sh		
	2 Amnesty Hosp	pital		30/07/2024	30/07/2024	sg	im		
	1 Cactus hospit	al		30/07/2024	30/07/2024	sg	response		
Doubl	e click on row to	edit details							ок

If you are working with a customer for whom no imprest list has been defined, clicking on the *New customer imprest* will display the *Enter new imprest* window, where appropriate entries are made.

2025/06/06 18:05	11/24	8.07. Stock control methods for your customers (requisitions)

🗶 Enter new imprest				
Name Name Stock take date 26.08.03			Black ID	: 1158
stock take date [2000/15			Statu	5 : MW
Order Received 26/08/13			Stock Type	e: im
			Entered by	y: Sussol
New line Delete line(s) (reate Customer Invoice Revert	to suggested quan	Print Stor	e: General
Lin Item code Item Name	Unit Our SOH Their Old S Im	prest q Their curren Suggested quan		Actual quan
				*
4				
Confirm				
Sava Sout Order			Cancel OK & Next	OK
Save Son Ofder				.:1

Continuing to use Highland Health Centre as our example (for whom we have created an imprest list), double clicking on that entry displays this new window on which the imprest list appears:

🛃 Edit imprest	100								l	_ 🗆 🕳 🗙
Stock	Name Highland Health 0 take date 26/08/13	Centre	HC4						Black ID : Entry date :	1153 26/08/13
Order	Received 26/08/13								Status : Stock Type :	sg im Surrol
New line	Delete line(s)	Create Cust	omer Invoice	Rev	ert to sugge	sted quan		Print	Store:	General
Lin Item code	Item Name	Unit	Our SOH Th	eir Old S	Imprest q	Their curren	Suggested quan			Actual quan
1 Ibu2	Ibuprofen 200mg tab	each	2336	0	2000	0	2000			2000 /
2 Pred5	Prednisolone 5mg tab	each	540	0	1000	0	1000			1000
3 Hal5	Haloperidol 5mg tab	each	21396	0	200	0	36			200
<	Confirm							Cancel	OK & Next	OK

You will note that there are no entries in the *Their current stock* column, and the figures supplied by the customer should be entered; click on each line, and after a second or two the zero appearing in that column can be edited with the required figures.



There is an important exception here: if the name you entered in the Name textbox is actually another store in mSupply then the *Their current stock* column will be automatically filled in with the stock in the store. Very useful time saving feature!

Simultaneously, mSupply completes the next two columns, *Suggested Quantity*, and *Actual Quantity*. The *Actual Quantity* entries may be edited to reflect, for example, pack sizes, to ensure that actual quantities match exact multiples of the pack size. After editing, the window may appear like this:

🖢 Edit	imprest	and a second sec								X
2	Stock	Name Highland Health Ce take date 26/08/13	ntre	HC4	l .				Black ID : 1153 Entry date : 26/08/13	3
New	Order Ine	Received 26/08/13 Delete line(s)	Create Cu	stomer Invo	ice Rev	sert to suggested q	uan	Print	Status: sg Stock Type: im Entered by: Sussol Store: General	
Lin	Item code	Item Name	Unit	Our SOH	Their Old S	Imprest quantity	Their current SOH	Suggested quan	Actual q	uan
1	Ibu2	Ibuprofen 200mg tab	each	2336	0	2000	730	1270	1	500 -
2	Pred5	Prednisolone 5mg tab	each	540	0	1000	380	620	1	000
3	Hal5	Haloperidol 5mg tab	each	21396	0	200	164	36		100

Should you have any reason to identify one or more lines, this may be performed by highlighting the line(s), and changing the colour of the font. Black is the default, but other options may be selected from the drop-down list:



Selecting 5 or more lines brings up an alert requiring confirmation of your intention.

Once you are satisfied, the *Create customer invoice* button should be clicked, and you will proceed to creating the customer invoice, which is the same for all requisition types.

Response (internal) requisitions

These work in much the same way as customer stock histories, but with some notable differences:

- Most importantly, you don't need to create it! A response requisition will be automatically created in your (supplying) store as a result of a request requisition from an mSupply mobile (see here for details) or an internal order from another store (e.g. on another mSupply 'desktop' site). In both of these cases, the customer is another store in your mSupply system and most of the data will have been entered already by them. You can create one manually if you need to though, as we'll describe below.
- It doesn't attempt to calculate usage or suggest an amount to supply this data is expected to have come from the customer.
- It is possible to generate multiple customer invoices from a single response requisition e.g. if not all of the requested stock is available at the time the requisition is entered, this allows for an initial customer invoice to be sent to partially fulfil the request and another to be sent at a later date when more stock becomes available.
- It provides a more accurate way to track demand vs supply.

Entering a requisition

To begin the process, choose *Customer > Show requisitions*, and the list of any historic response requisitions is displayed along with the other requisition types. A *Status* of sg (suggested) means that no customer invoices have been created yet - as soon as the first customer invoice is created, the status will go to cn (confirmed). The list looks like this:

Last update: 2025/01/20 22:50 issuing_goods:stock_control_methods https://docs.msupply.org.nz/issuing_goods:stock_control_methods

New	customer New customer Ne	w customer ock history		Delete	Finalise			Show Past 30 days
D	Name	Date	e entered	Requisition date	Status	Type	Comment	
- 4	Bike Hospital	30	0/07/2024	30/07/2024	sg	sh		
2	Amnesty Hospital	30	0/07/2024	30/07/2024	sg	im		
1	Cactus hospital	30	0/07/2024	30/07/2024	sg	response		

- **Show** drop down list: Set to *Past 30 days* by default which will show requisitions created in the last 30 days. You can select other options to show thiose with a particular status or entered in different time periods.
- **Type here to search** field: If you type in here, requisitions for customers with names containing what you type only will be displayed. A good way of finding a particlar requisition if the list is long.

Either double-click on a requisition in the list to edit it, or click the **New customer requisition** button to create a new one. The example below is for a manually entered requisition:

Name Requisition date	Cactus Hospital 05/09/2022 Order Received Required date	CAC 05/09 05/09	2022	Ti Co Mi	heir ref mment xx MOS 1.0	requisito		c	ategory Please select	Black	ID : Status : Type : Entry date :	6 nw response 05/09/2022
New line A	dd from master list Delete line(s)	Filt	er items Filt	er by item r	ame or code		Supply quantit	y Cre	ate customer invoice	Print .	Entered by : Store :	Admin General Warehouse
			Data e	ntry Invo	vices created	Log	Reference doc	uments				
Item code	item name	Unit	Our stock on hand	Customer current stock on hand	Customer requested	Already issued	Remaining to supply	Supply this invoice		Comment		
1 030453	Amoxicillin 250mg tabs	Tab	2257600	265	200	0	200	200				
2 038423	Salbutamol scored 2mg tabs	Tab	17000	469	300	0	300	300				
3 042744	Diazepam Injection 5mg/ml Amp/2ml	Aule	1450	5	30	0	30	30				
4 850804	Oral Rehydration Sr 1 litre/ CAR-100	Sachet	15000	79	100	0	100	100				
5 030062	Acetylsalicylic Acid 300mg tabs	Tablet	5000	761	400	0	400	400				
6 201116	Bandage W.O.W. 15cm wide x 5m roll	Roll	4332	184	200	0	200	200				
7 031661	Captopril scored 25mg tabs	Tablet	47500	77	200	0	200	200				
8 037020	Paracetamol 500mg tabs	Tablet	81000	980	500	0	500	500				
												_
<u>14</u>												
e Sort order												
								Finalis	Cancel	OK&	Next	OK

If this is a manually entered requisition:

- Enter/update the customer *Name* in the same way as a customer stock history (i.e. enter the first key characters and hit the **Tab** key to find matches), but note that changing the customer will invalidate any other data that you've already entered.
- If necessary, update the *Requisition date*, *Order received* and *Required date* these will default to the current date.
- Select a *Category* if required (see below for setting these up).
- Use either the **New line** button to manually add a single item, or **Add from master list** to add all items from a master list.

When you click on the **Add from master list** button you will see a list of all the master lists assigned to your store and your customer (see the 4.04. Item master lists page for details on master lists and how to assign them). Whichever master lists you choose to add items from, only the items visible in your *customer's* store will be added to the requisition. This will avoid the situation where you send a store an item that they didn't previously have visible to them!

- If the customer is another store, mSupply already knows their current stock, otherwise adding a single item will give you the opportunity to enter the customer's current stock for that item. Either way, the cursor will go into the *Customer current stock on hand* cell, which will already be filled in.
- If adding from a master list, the cursor will go into the first new item's *Customer current stock* on hand cell, but you'll then have to type in a value (unless the customer is another store, in which case the value will have been filled in for you).
- Either way, hitting the **Tab** key will move the cursor into the *Customer requested* cell. Type in a value and this will be automatically copied to the *Remaining to supply* cell and also the *Supply this invoice* cell, which will now have the cursor.
- Amend the *Supply this invoice* value if necessary and optionally enter a *Comment* (e.g. if the amount supplied is less than requested).
- If necessary, use the **Delete line(s)** button to remove selected item lines.

If the requisition has come in automatically from another store (e.g. mobile or an internal order):

- The customer *Name* is already filled in and cannot be changed.
- The *Customer current stock on hand* and *Customer requested* columns are already filled in and cannot be changed i.e. only the *Supply this invoice* and *Comment* columns are editable.
- If necessary, you can still add and/or delete item lines manually.

If the requisition has a lot of item lines, you can filter them by typing into the *Filter items* field. If you do that, only the lines with items beginning with the letters you have typed in the field will be displayed. The text X/Y will be displayed after the search field to indicate that X lines of the total Y lines in the requisition are currently being displayed (2/8 in the following screenshot):

Last update: 2025/01/20 22:50 issuing_goods:stock_control_methods https://docs.msupply.org.nz/issuing_goods:stock_control_methods

New line Add	id from master list Delete line(s) s created Log	Filter iter	ns a		2/8			Cre	ate customer invoice	Print	Status : sg Type : respons Entry date : 15/02/18 Entered by : Admin Store: Central	e Medic
Li Item code	Item name	Unit	Our stock on hand	Customer current stock on hand	Customer requested	Already issued	Remaining to supply	Supply this invoice		Comment		
1 030453	Amoxicillin 250mg tabs	Tab	2,257,600	265	200	0	200	150	partial supply			~
5 030062	Acetylsalicylic Acid 300mg tabs	Tabl	5,000	761	400	0	400	300	partial supply			
<												

Note that, while a filter is active, some of the other buttons are disabled e.g. you can't create an invoice or save the sort order unless all lines are visible. To make them active again, simply delete any text in the *Filter items* textbox (which will remove the filter).

Once you are satisfied, the *Create customer invoice* button should be clicked, and you will proceed to creating the customer invoice. The *Supply this invoice* values will be used to populate the new customer invoice and the requisition status will change to confirmed.

Finalise Checkbox

Clicking on the "Finalise Checkbox" finalises the requisition form. After this no changes can be made.

Finalised requisitions will no longer appear on reports that show "Remaining Quantities" as pending. Finalised requisitions are be considered as fully processed.

Reference documents

The Reference documnents tab on a requisition enables you to save documents and other files relating to the requisition. The tab looks like this:

 17/24	8.07. Stock control methods for your customers (requisitions)

Customer H	Hogwarts Dispensary	CHOC	Their ref	From request requisi	Black		ID: 8	
Requisition date 1	17/11/2022	Order Received 17/11	2022 Comment	From request requisition3			Status: cn	
Order type	Requ	ested delivery date 17/11	2022 Max MOS	3.0	Category Please select	0	Type: res	ponse
Program A	All items: General Warehou	se	Threshold MOS	0.0			Entry date: 17/	11/202
Period							Entered by: Ad	nin
From:	Te:						Store: Ger Wa	eral ehouse
			Data entry Invoices of	reated Log Reference docume	nts			
-			11					
Upload docum	nent Delete d	locument Downlo	ad document			Show	Show all	
	File name		Created by	Created on	Saved on	_	Version no	_
_								
								-

The table shows you all the files currently uploaded to this requisition.

- **Upload document button:** Click this to upload a document of the requisition. This will open a window enabling you to search for and select the file on your computer. After you've selected it, click on the **Open** button to upload it. If you upload a file with the same name as one already uploaded, mSupply will upload it as a new version of the already uploaded file.
- **Delete document button:** Select a file in the table by clicking on it and click this button to remove it from the requisition.
- **Download document button:** When you click on this button you are presented with two options:
 - **Download:** this will download the file to a location you select on your computer.
 - Download and open: this will download the file to a location you select on your computer and then attempt to open it using the default application on your computer for that file type. If there is no application associated with the file type on your computer then mSupply will tell you that the file could not be opened.

Requisition categories

2025/06/06 18:05

You can assign requisitions to a category for reporting. To setup the categories that users can select from, choose *Special* > *Requisition categories* from the menus. This window will open:

New	Set inactive	Type here to search
	Description	Is active?
Normal		
Emergency		\checkmark

This window shows a list of all the requisition categories currently setup. The ones with a tick in the *Is active* column are the ones that can be selected on a requisition. If there is a long list then you can type in the *Type here to search* field to show only categories that contain what you type.

To add a new category, click on the **New** button. This window opens:

	Requisition category
Description	
Is active	☑
	Cancel OK

Enter a **Description**, click the **OK** button and the new category is added to the list.

To edit a category, double-click on it in the list and the same window as creating a new one will open but populated with the selected category's settings. Edit the category's name or the active status and click the **OK** button to save your changes.

You can quickly set a category as inactive (which means that it will no longer appear in the drop down list for selection on a requisition) by selecting it in the list and clicking on the **Set inactive** button.

Requisition status

Summarising from above, the status of the requisition has the following meanings:

- Status = sg (suggested): No customer invoices have been created yet
- Status = cn (confirmed): At least one customer invoice has been created from the requisition
- Status = fn (finalised): No changes can be made to the requisition. It will no longer appear on reports that show "Remaining Quantities" as pending. Finalised requisitions are be considered as fully processed.

Creating the customer invoice

Regardless of the requisition type, when the *Create customer invoice* button has been clicked, and the following window appears:

	N Thei omr	lame Highl ir ref nent Invoid	HC4	Cor	nfirm date Category	00/00/00		¥	Colour : Invoice : 3 Entry date : 2 Goods receive ID : 0	Black 6/08/13
Nev	+ w lir eral	ne (Summary b	Delete line(s) by Item Summary by Batch Transport deta	ails Log		Mistory	(Confirm	Status : s Entered by : S Store : (ig Gussol General
١	Li	Location	Item Name	Quan	Pack Size	Batch	Exp date	Sell Price	Price exten	
q	1		Ibuprofen 200mg tab	1500	1	none		0.00		0.00
ų	2		Prednisolone 5mg tab	1000	1	none		0.00		0.00
	3		Haloperidol 5mg tab	100	1	none		0.00		0.00
h	:	I 🖬	Other cha	irges Item:					Amount:	0.0
									0 % tax:	0.0
									Total:	0.0
Ho Fin	ld aliz	e	Export batch: 0				OK &	Next	Delete	ж 🗖 🤇

If the customer invoice has been generated from an original internal order in another store, the customer invoice window will have a red **Stock transfer** label.

Similarly, if the customer invoice has been generated from an original internal requisition in another store, the customer invoice window will have a red **Internal requisition** label.

All the entries appear as (red) placeholder lines. The operator needs to allocate stock to each of these placeholder lines before a pick list can be printed. The operator can either manually allocate stock or

by using the Grinder button.

Manually allocate stock

The next step is to double click on each entry and allocate stock. In the example, the 1st item on the invoice, *Ibuprofen 200mg tablets*, is being processed; there are several batches in our store, some of which have reached their expiry; although line 4 indicates there are sufficient to meet this order in the store, you will note that only 106 tablets are available, so we select line 6.

line	Ibupro	fen 200m	g tab						📕 Ibu	2			
Line	15	6 00 of 25	00										
Pack		1 each	В	ulk/Out	er pa	ick size	0						
Add Place holder Re-lookup Sell Price													
Li	Issue	Available	Tot in store	Pack	Hold	Batch	Expdate	Supplier	Location	Cost Price	Sell price	Status	
2	0	600	600	1		ID1H0280	30/11/10	ida	TAB	0.01	0.01		
3	0	140	140	1		IDIH0280	30/11/10	ida	TAB	0.01	0.01		
4	0	106.0000	1596	1		IDIH0280	29/11/16	ida	TAB	0.01	0.01		
5	0	1000	1000	1		G366	31/12/16	invad	AAA	0.00	0.00		1
6	0	2500	4000	1		DP8081	31/01/17	ida	AAA	0.01	0.01		
ر	Total q otal qua	uantity iss ntity availa	ued 2 able 4	2000				Ca	ncel	ОК		K & Next	

Clicking on OK & Next displays the next item on the invoice, Prednisolone 5mg tablets.

Item	Predni	solone 5m	ig tab						📕 Pred	15			
Line		1							_				
Quan	10	00 of 0											
Pack		1 each	В	ulk/Ou	ter pa	ck size	0						
	Add	Place hold	er F	Re-distr	ibute	all	Re-lookup	Sell Price]				
Li	Issue	Available	Tot in store	Pack	Hold	Batch	Expdate	Supplier	Location	Cost Price	Sell price	Status	
										0.00	0.00		
1	1000	0	0			TIONE				0.00	0.00		
1	1000 0	0 540	0 540	1		WE201	31/12/16	invad	AAA	0.00	0.00		
1	1000 0	0 540	0 540	1		WE201	31/12/16	invad	AAA	0.00	0.00		
1	1000 0	0 540	0 540	1		WE201	31/12/16	invad	AAA	0.00	0.00		

Click *Redistribute all*, which is the normal procedure. There is only one batch available, but there is insufficient stock to meet the order, so mSupply® creates a placeholder line for the outstanding amount.



When the final item has been processed, clicking on *OK* will display the completed invoice.

1 . (lus	tor	mer invoice					_			×
2		N	lame High	land Health Centre	Cor	nfirm date	00/00/00			Colour:	Black
	1	The	ir ref	HC4						Invoice : 30,034	
	C	omr	ment Invoi	ce from customer stock history		Category	None		*	Entry date : 26/08/1	3
										Goods receive ID: 0	
	_	_	,				_		_	Status : sg	
	Ŀ	t	j –	—			1		-	Entered by : Sussol	
ħ	lev	v lir	ne l	Delete line(s)			History		Confirm	Store : Genera	1
Ge	ne	ral	Summary b	by Item Summary by Batch Transport details	Log						-
N	L	.i	Location	Item Name	Quan	Pack Size	Batch	Exp date	Sell Price	Price exten	
Ē	g	1		Ibuprofen 200mg tab	1500	1	none		0.00		0.00 🕋
1	7	2		Predhisolone 5mg tab	460	1	none		0.00		0.00
	2	2	AAA	Ibuprofen 200mg tab	1500	1	DP8081	31/01/17	0.01		15.00
8	8	3	AAA	Prednisolone 5mg tab	540	1	WE201	31/12/16	0.00		0.00
	1	3	TAB	Haloperidol 5mg tab	100	1	7MK29	31/10/10	0.06		6.00
F	ł										
	÷										
F	T										
	t										
	Т										
											-
-		-		Other charge	Item:					Amount:	0.00
đ		i	j 🚺 🖬) chief charge	are the					Subtotal:	21.00
										0 % tax:	0.00
										Total:	21.00
	Hol	ld aliz	te	Export batch: 0				OK &	Next	Delete OK	. 4

The Grinder button

If your store is organised well, particularly by use of location priorities, you can automatically allocate stock to all placeholder lines by use of the grinder icon at the bottom left.

3	MURIVILATION DE LAOS	
10	Multivitamin Syrup BP Bot/60ml	
11	Vitamin B1 (Thiamine HCL) 50mg tab	s
12	Vitamin B6 (Pyridoxine HCL) 50mg tal	bs
13	Dexamethasone Sodium Phosphate 0	.5m
Renum	ber lines in the current order	

Make sure the Hold checkbox is not checked, and at this stage the invoice may be confirmed.

If the customer invoice is for another store (i.e. if it has a red **Stock transfer** label or red **Internal requisition** label), it must be **finalised** in order to transfer the goods to the other store:

- For a stock transfer, this will generate a supplier invoice in the other store see Transferring goods to another store
- For an internal requisition, this will generate a goods received record in the other store see Receiving goods from another store

After creating a customer invoice

- The *Already issued* column will be updated to reflect any non-placeholder lines (i.e. those not coloured red in the customer invoice) in any customer invoices which have been generated from the requisition regardless of the customer invoice status (i.e. it doesn't have to be confirmed).
- The *Remaining to supply* column will be reduced by the amount already issued, and *Supply this invoice* will be updated accordingly:

Name Requisition date Order Received New line Ac ata entry Invoice	Cactus Hospital 15.02/18 15.02/18 diffrom master list Delete line(s) F es created Log	CAC ilter ite	ns (Filter by	Their Commo	ent 678]	Cre	ate customer invoice	eck Print	ID: 2 Status: cn Type: response Entry date: 15/02/18 Entered by: Admin Store: Central Medico
Li Item code	Item name	Unit	Our stock on hand	Customer current stock on hand	Customer requested	Already issued	Remaining to supply	Supply this invoice		Comment	
1 030453	Amoxicillin 250mg tabs	Tab	2,257,600	265	200	150	50	50	partial supply		~
2 038423	Salbutamol scored 2mg tabs	Tab	17,000	469	300	300	0	0			
3 042744	Diazepam Injection 5mg/ml Amp/2ml	Am	1,450	5	30	30	0	0			
4 850804	Oral Rehydration Solution Reso Ma	Sac	15,000	79	100	100	0	0			
5 030062	Acetylsalicylic Acid 300mg tabs	Tabl	5,000	761	400	300	100	100	partial supply		
6 201116	Bandage W.O.W. 15cm wide x 5m roll	Roll	4,332	184	200	200	0	0			
7 031661	Captopril scored 25mg tabs	Tabl	47,500	77	200	200	0	0			
8 037020	Paracetamol 500mg tabs	Tabl	81,000	980	500	500	0	0			

In the example above, a single customer invoice has been created to supply most of the requested stock, apart from two items. You can then create a second customer invoice to supply the outstanding amounts.

Details of the related customer invoices can be seen in the **Invoices created** tab:

🏚 Edit requisiti	on									
Name Cactus Hospital Requisition date 15:02/18				CAC Their ref 678	Black				ID : Status :	2 cn
Order Rece	ived 15/02/18								Type : Entry date : Entered by : Store:	response 15/02/18 Admin Central Medical
Data entry In Invoice	Invoice confirmed	Log Invoice	ltem code	Ben Name	Number	Pack Size	Total	Batch	Expiry of	iate
2	7 06/06/2018	cn	030062	Acetylsalicylic Acid 300mg tabs	0	1,000	300	c17878		30/04/2020 ^
2	8	sg	030062	Acetylsalicylic Acid 300mg tabs	0	1,000	100	cf7878		30/04/2020
2	7 06/06/2018	cn	030453	Amoxicillin 250mg tabs	0	1,000	150	82929		31/12/2020
2	8	sg	030453	Amoxicillin 250mg tabs	0	1,000	50	82929		31/12/2020
2	7 06/06/2018	cn	201116	Bandage W.O.W. 15cm wide x 5m roll	3	12	36			
2	7 06/06/2018	cn	201116	Bandage W.O.W. 15cm wide x 5m roll	13	12	164	D456486		30/04/2021
2	7 06/06/2018	cn	031661	Captopril scored 25mg tabs	0	500	200	C)67562		30/07/2022
2	7 06/06/2018	cn	042744	Diazepam Injection 5mg/ml Amp/2ml	1	25	30	sdflj28		31/03/2020
2	7 06/06/2018	cn	850804	Oral Rehydration Solution Reso Mal 42g sachet for 1 litre/ CAR-100	1	100	100	654TD47		
2	7 06/06/2018	cn	037020	Paracetamol 500mg tabs	0	1,000	500	D56756		
2	7 06/06/2018	cn	038423	Salbutamol scored 2mg tabs	0	1,000	300	56D7678		31/03/2022
										v
Cancel OK & Next OK										

Double-clicking on any of these lines will open the corresponding customer invoice.

Danger of failing to re-supply in time

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Obviously, regardless of the calculation method employed, if the supplying store fails to re-supply the customer within the supply period (G) then the customer will start eating into the buffer stock and is in danger or running out of stock!

Previous: 8.06. Box management | | Next: 8.08. Customer budgets

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Permanent link: https://docs.msupply.org.nz/issuing_goods:stock_control_methods



Last update: 2025/01/20 22:50