# 4.01. About items

An item in mSupply is usually a product that you purchase from a supplier, hold in stock and supply to a customer. However, there are also other types of items:

- A service item has no stock, but can still be added to customer invoices and charged for. Service item examples are a freight charge, a consultation fee, an express delivery fee, etc.
- A cross reference item points to another item, so that when it is chosen in a list, it is substituted with the item to which it refers. This allows you to have items in your system that are referred to by trade name, but are only issued according to their generic name.

Managing items is mostly done from the **Item** menu or **Item** tab on the Navigator. The item menu also contains commands for managing lists related to items such as accounts, drug interactions and units.

For how to add a new item, see Adding a New item.

# Item menu

Item	Supplier	Customer	Report	Special	Help
	Show items New item				Ctrl+I
	Show repac New repack	ks			
	Show builds New build				Ctrl+B
	Ad Hoc iten Ad Hoc Iten	ns n history			
	Show inven Inventory ad Inventory ad	tory adjustm djust- add st djust- reduce	ents ock e stock		
	Merge two i	tems		Ctrl	+Shift+M
	Show depar Manage iter	tments m access			
	Manage dru	ig interaction	n groups.		
	Show units.				
	Show accou	ints			
	Show item o	ategories			
	Show locati	ons			
	Show locati Merge two l	on types locations			
	Show item r Show Stock Show items	master list takes with stock			

# Show items

Use this command for viewing or editing just about any information about an item.

First you are presented with a window asking you to enter search criteria to find the items you are interested in:

•	Find Iter	n	
Item name	▼ starts with	•	
and		Don't Care	-
and	<ul> <li>VEN categor</li> </ul>	y is Don't Care	•
and	<ul> <li>department</li> </ul>	is Don't care	Ŧ
Randomly ✓ Exclude hidde	0 items from re	turned list.	
Complex Find	i	Cancel	Find

If you click on the **Find** button (or press the Enter key on the keyboard) without changing anything you will be shown a list of all the visible items in your store. But you can refine the search by entering and selecting different values in the different filter lines shown in the window. If you enter no value for a filter then that filter is ignored.

**Randomly select x items from returned list** text box: If you enter a number in here mSupply will randomly select that number of items from the items which match the search criteria you have entered in the filters above. Beware: if there are less items returned from the search than the number you enter in here mSupply will return all the items it found with no random selection.

**Exclude hidden items** checkbox: This is checked by default and means that only items that are visible in the store you are logged into are included in the search. If you uncheck this box then all items in all stores in your datafile will be included in the search.

If only one item is found by your search then its details are displayed, otherwise you will be shown a list of matching items.

The **Complex find** button gives you access to a more powerful query editor where you can find a very specific set of items. A tutorial on using the query editor is to be found in the custom reports section.

To do a "contains" search, use the wildcard character '@'; e.g. entering "@250" will find all items with "250" anywhere in their name.

Here's an example of a list of items displayed after clicking the **Find** button:

					Item	list				
+		<b>!</b>	٩		=		1	٢		
New item	Report	Set values	Find	Order by	Print	Modify	Duplicate	Customise		205/1966
Item Code	6	Item nam	ie .	^ Defaul	t pack	Stock on	hand	2.12	Flags	
DORAAB002	Abacav	ir/Lamivudine, (	600/300mg, 1	tab	1			0		
DORAAL004	Albenda	azole, 400mg, t	ab		1			0		
DORAAL006	Alumini	ium HydroxHy	ydr.), 500mg,	tab	1			0		
DORAAM008	Amlodi	pine, 10mg, tab	)		1			0		
DORAAM010	Amlodi	pine, 5mg, tab			1			0		
DORAAM012	Amoxic	illin + Flucln,	250/250mg.	cap	1			0		
DORAAM014	Amoxic	illin Syrup,mg	/5ml, 60ml,	bot	1			0		
DORAAM016	Amoxic	illin, 250mg, ta	b/cap		1			0		
DORAAM018	Amoxic	illin, 500mg, ta	b/cap		1			0		
DORAAM020	Amoxic	illin/Clavulg	/5ml, 100ml,	bot	1			0		
DORAAM022	Amoxic	illin/Clavulanic	acid, 625mg,	tab	1			0		
DINJAM002	Ampicil	lin, inj, 500mg,	vial		1			0		
SMSUAP002	Apron,	plastic, disposil	ble, pce		1			0		
DORAAR028	Arteme	ther / Lume0	mg, 12 tabs, s	strip	1			0		
DORAAR026	Arteme	ther / Lume0	mg, 18 tabs, s	strip	1			0		
DORAAR024	Arteme	ther / Lume0	mg, 24 tabs, s	strip	1			0		
DORAAR030	Arteme	ther / Lume2	Omg, 6 tabs, :	strip	1			0		
DINJAR004	Arteme	ther, inj, 80mg,	ml, 1ml, amp	2	1			0		
DINJAR006	Artesur	ate, inj, 60mg,	vial		1			0		
DORAAS032	Ascorbi	ic acid (Vitamin	C), 100mg, ta	ab	1			0		
DEXTAS002	Aseptol	, S00ml, bot			1			0		
DINJAT008	Atropin	e sulphate,1n	ng/ml, 1ml, a	mp	1			0		

Double-click the item in the list to view its details.

# Items list view

**New item:** Click this button to enter the details of a new item you are adding to your inventory. You can find out how to do this here

**Report:** Click this button to open a report editor window where you can design a report. The report will use the currently displayed records (not the highlighted records).

Set values: A flag is a quick way of identifying a group of items for use in a report.

2 Set values ×
Set flags for highlighted items
Set flag to
Append to existing flags
Replace existing flags
Set forecasting options for highlighted items
When calculating future consumption:
Do not change- use current setting
<ul> <li>Use historical Average Monthly Consumption (AMC)</li> </ul>
O Use historical AMC increased by a factor of: 0 %
Use a fixed, estimated AMC of: 0 items/month
○ Use projection: A 👻
Cancel OK

\* You can set and remove flags for multiple items at the same time. To do so, hold down the control key (command key on Mac) and click on the lines you wish to flag. They will become highlighted. Then click the "set flags" button. You will be shown a window like this:

We recommend you use a single character (or two) as the flag.

If you choose **Append to existing flags**, any items with existing flags will have the new flag added to the end of the flag. If you choose **Replace existing flags**, then the selected items will have their flags cleared. Note that you can clear all flags for all items by selecting all items (control - A) then leaving the **Set flag to.** field blank, clicking "Replace existing flags", and then clicking the **OK** button.

**Find:** Clicking this button displays the **Find** window, the same as if you had chosen **Items > Show items**.

**Order by:** Clicking this button will bring up the standard Order by window, where you can choose fields by which to sort the displayed items

**Print:** Click this button to print the items currently displayed in a list.

**Modify:** Click this button to show details for the first record that is highlighted. Clicking the **OK and Next** button in the item details window will jump to the next highlighted record. To select multiple records, hold down the control key (command on Mac) while you click on the records you wish to select.

**Duplicate**: Click this button to create a new item with the same details as the selected item. A message box like the one below will appear. Click on button **Duplicate** to confirm creating the duplicate. Note that the only difference you will see between the existing item and the newly created item is the name of the new item ends with the text '(copy)'. The new item will be added to the end of the currently displayed list of items.



Note that for recording and audit purposes a Log event is created when an item is duplicated. For more information on log events see The Log

**Customise list:** Clicking this button will show a window where you can choose which fields from the items table are shown in the list view. See Working with lists.

# Item details window

•••	1	tem details
General	Item name Albendazole 400mg, tabs, chewa	ible Store: General O
Storage	ltem code alb400tc	Pricing
Usage	General	Default margin 0
Usage Stock Ledger Quotes Backorders Notes Reconcile Bill of materials Purchase Orders Order options Dispensing Reporting		Default sell price of preferred packsize 0.00 Price editable when issuing Full description Product specifications
Log Requisitions Stores Barcodes	Doses Is a vaccine? Hold: do not issue	
Custom data	Allow pack to one conversion	Stock category Custom fields
Master lists	Convert pack to 1 when receiving	Normal stock user_field_1
Interactions	Include in DHIS2 data push	Critical stock user_field_2 On essential drug list user_field_3
		VEN Category user_field_5 0.00
		<ul> <li>Not assigned user_field_6</li> <li>Vital user_field_4</li> <li>Essential user_field_7</li> <li>Not essential</li> </ul>
Delete		OK & Previous OK & Next Cancel OK

# Buttons in the item details window

**Delete:** Provided that an item has no transactions, quotes, order lines or backorder lines, it can be deleted, and this button performs that action.

Once you have received stock for an item, it cannot be deleted. You can delete an item immediately after you have created it or imported it. Note that if you have imported an item and stock, you can delete it, and it's associated stock will be deleted too (but not once it has been used in a transaction such as an invoice or build).

**OK & Next:** Saves changes, exits the window, then brings up the next item in the item list. If you did not have an item list open, or if you have reached the last item in the list, you will be returned to the list or the initial menus, depending on your starting point.

**Cancel:** Exits the window without saving changes.



Changes you have made to quotes, notes and backorders will be saved, even if you click **Cancel** .

**OK:** Saves changes then exits the window.

# Tabs on the item details window

The item details window displays a vertical list of 'tabs' down the left side. Click on the appropriate item to view a 'tab' displaying particular information about an item. The Item Details Window normally opens at the **General** tab.

# **General tab**

What are those lock icons? To minimise the chance of accidental amendment, some critical fields have a lock icon to the left of it. To change any of these fields, you must click on the lock icon first, and then enter the new value in the field.

**Item name:** This is the name by which mSupply will refer to the item.

**Store:** The store which you are using is displayed here. For mSupply systems that are only using a single store, this field is not relevant. For users managing more than one store, the desired store may be selected from the drop down menu. For users having access to all stores, and wishing to work with the cumulative data from them all, one of the options displayed will be "Supervisor - All stores" - refer Miscellaneous topics, Supervisor Mode.

- You should avoid changing the name of an item to that of another item. If you have accidentally created two copies of the same item, these should be merged refer Merging two items.
- Historical records will still record the original name, but future invoices and invoices in process will pick up the new name when you add or edit an invoice line.

**Item code:** This is the code assigned to the item. This should be a unique code, and ideally, should not be a part of another code. For example, 1034 is unique, but is a part of 1034a, and so these two codes should ideally not coexist in an mSupply system.

# General

**Units:** Choose the unit you use for this item. It is useful to distinguish items you issue by pack (eg eye drops) from items you issue by volume (eg oral liquids)

**Department:** You can assign each item to a department by choosing from the list of departments here. To set up departments, refer Managing Item Access....

**Category:** Provided that you have defined item categories, the appropriate category should be selected using the drop down list which displays your defined categories - refer Item categories.

**Interaction group:** Here you can choose the interaction group for the item - refer Manage drug interaction groups.

**Item Flag:** The item flag field is designed for bulk editing, where you use the list view to update many items at once. You can enter or edit an individual item's flag(s) here, though it can be easier to do so using The list view.

Universal Code: mSupply has the ability to look up and store a Universal Code for each item. Click

on the select button Stolook up a universal code. mSupply will look up matches based on the first three letters of the item name. Ensure you carefully select the correct item from the list when using this feature.

If you want new universal codes added to the system send an email to support@msupply.org.nz

You can search universal codes from a web browser at https://universalcodes.msupply.org.nz/

**Catalogue Code:** Frequently organisations may apply a second code to an item - e.g. one for auditing purposes, in addition to one for general use. This field allows the entry of such a code.. Provided the **Include catalogue code for each item** box is checked under **Preferences > Misc**, a report on Catalogue codes may be produced.

**Hold: do not issue:** If this box is checked, the item will not be available to be issued on invoices. It will still appear in lists, but you will get a warning if you choose it when issuing stock, and will be required to choose a different item.



**Issue in builds only:** Checking this box will mean that the item cannot be issued on customer invoices. This is useful in situations like where an item which by law can not be sold in an unprocessed state, but is used to 'build' (refer Building (Manufacturing) Items) another item which is legal for distribution.

Allow pack to one conversion: Checking this box allows stock of the item to be repacked to "1".

**Convert pack to one when receiving:** If this box is checked, when you receive items the pack size will automatically be converted to "1". This is primarily for use in dispensary mode, but may be useful in other situations too.

For example: say you receive 50 x 100 boxes of paracetamol tablets, but you issue variable amounts of paracetmol tablets on invoices. If this option is checked, as you receive the stock on a supplier invoice, it will be converted to 5000

(quantity) x 1 (pack size). You will now be able to issue any quantity you like. The cost and sell price are automatically adjusted for the new pack size.

#### Shelf locations

**Shelf Location:** The *default* shelf location for this item *in this store*. When you receive items into stock, they will be given the shelf location you enter here unless a different location is chosen. Type as much of the location (ie the first few characters) or code as you know, then press the *Tab* key. If only one location code matches your entry it will be filled in automatically, otherwise you will be shown a standard choice list like this:

•			Search location t	٩
New location	Description		Location tune	
0.006	Dulk Store A	-	Editation (ype	
EUD	Equipments			
Flamin	Elamoshie items storage			
HCD	High Cost Drugs			
CAB	High Cost Goods			
INJ	Injections			
INS	Instruments			
LTE	Liquids, Topicals, EERVINS			
MAN	Manufacturing Unit			
MDS	Medical Devices - Equipment & Instrument			
FBI	Refrigerator			
TAB	Tablet rooms			
4				F
	_			_

Select the location you want by double-clicking a line or by clicking once on the line and then clicking  $\mathbf{OK}$ 

Each stock line can have its own shelf location, or can share a location with another stock line.

**Bulk Shelf Location:** Similar to shelf location but it is used to store bulk quantities of goods/items. You can enter a code here in the same manner as for the Shelf Location.

**Preferred pack size:** This is the *default* pack size that will be chosen when receiving new goods or adding an item to a purchase order. It will also be used for comparison of quotations from suppliers (i.e. the *adjusted price* used when comparing quotations is the price if all quotes for the pack size defined here.

**Restricted to** Here you can choose from a list of Location types. For example, all cool store locations could have been given a type of "cool" and then if the item you are editing should be kept in a cool store, choose that type here, and you will only be able to receive that item into a cool store location.

**Volume per pack:** If you are using available volume tracking in your warehouse, then fill in the default volume for one pack of the preferred packsize of the item here.



mSupply® always stores volumes as m3 (cubic metres), but you can enter a volume as millilitres (mL), litres (L) also.

#### <HTML>

#### </HTML>

You enter	Value displayed	mSupply® stores
30ml	30ml	0.00003 m3
1500L	1.5 m3	1.5 m3
600 L	600 L	0.6 m3
1500 ml	1.5 L	0.0015 m3

#### <html>

#### </HTML>

**Outer pack size:** The number of *default* packs per *default* outer pack

**Outer pack volume:** The volume for the *default* outer pack. This may be different to an exact multiple of the volume per *default* pack you entered above, as outer packs may have their own packing. (For example, vaccine packs may come in an insulated container.)

Weight per pack: The weight of a *default* pack in kg.

#### Pricing

**Default margin:** This is the margin that will be applied to this item on supplier invoices to calculate the selling price. Note that if a supplier margin is also set, there is a setting in the **Preferences** > **Invoices 1** that determines which margin will be used. Note also that if a default selling price is set, this price will take priority and be used rather than the margin.

**Default sell price of preferred pack size:** Only enter a price here if you want a fixed selling price for this item. Enter the price for one unit (eg 1 capsule or 1 gm). A price entered here will override any margins you have specified for either the supplier or the item.

Price editable when issuing: Check this box to enable this feature

#### Full description

This field may be used for entering a fuller description of the item should the item name alone be insufficient.

#### VEN category

Like all categorisations, this one is used for reporting. VEN category options available are:

- Not assigned
- Vital
- Essential
- Not essential

You can select one of the options only and *Not assigned* will be selected for all items by default.

Authorities, including the WHO, are inconsistent on whether **N** should stand for **Necessary** or **Not essential**. It makes no difference to mSupply, but if you want this changed in your installation of mSupply, talk to Sustainable Solutions

#### Stock category

These categorisations are used for reporting and you can check as many as are appropriate. You don't have to check any, they are entirely optional.

#### **Custom fields**

These are 7 fields available for users to store information appropriate to their operation. These fields may be queried when performing a search or producing a custom report. Their default names are **user\_field\_1, user\_field\_2,** etc.., but these labels may easily be edited to more descriptive ones as required..

Field types:

- Fields 1,2,3 & 6 are text fields
- Field 5 is a numerical field
- Fields 4 & 7 are boolean True/False (Yes /No) entry.

To set the names of the user fields, refer General Preferences, Miscellaneous tab.

# Misc(ellaneous) tab

This window has settings for:

- 1. cautionary warnings used when dispensing medicines
- 2. accounts used when exporting transaction information
- 3. SMS (text) messaging
- 4. Price list

0 0		Item de	tails	
General Misc	🛱 iten	name AMOXYCILLIN 250mg TAB/CAP		Store: General \$
Usage	Warnings			Price list
Ladger		]		On price list 🗌 🛛 🕹
Quotes	Add Dele	te		Indicative price 0
Backorders	Code	Warning text	Priority	Beaut mark
Notes	Code	Harning text	ritority	Report pack
Reconcile				
Bill of materials				
Purchase Orders				
Order options				
Dispensing				
Reporting				·
Log	Account codes f	or exporting		
Stores	Expense accou	nt when buying : Cost of goods sold (3000)		
510105	Income accou	int when selling : Income (1000)		
· · · · ·	Asset as	count for stock (2000)		
		and the states - states (Frank)		
	SMS settings			
		ur - to - are		
		MS code am250		
	3 SMS p	ack size 1000		
Delete	)		OK & Previous OK &	Next Cancel OK

**Warnings:** Warnings which apply to this item are chosen from a standard list. This list is set up using the *Special > Warnings* menu.

Use the **Add** button to add a warning for the item. This will open the below window where you can choose the warning from a list. Double click on the warning you want to use. You may also add new warnings to the list by clicking the **new** button.

to Selec	ct, add and edit war	nings				×
•	-					
Ne	w Delete					
0	ode		Warning Text			
1	Please chec	k expiry date				$\sim$
2	May cause	frowsiness				
					,	, ĭ
-						
				Cancel	ОК	
						al

To delete a warning, click on its line then click the **Delete** button.

When an item has more than one warning, the warning that has priority will be automatically printed on the label. You can add other warnings as part of the label directions if required.

To give a warning priority, double-click its line in the list and check the Priority box:

	🔹 Edit warning ×
	Warning Code 2
	Warning text May cause drowsiness
	Priority Cancel OK
l	
	A warning's text may only be edited by choosing <b>Warnings</b> from the <b>Special</b> menu

**Accounts:** You can set the general ledger account to be used for exporting purchase and supply transactions involving this item here.

To set each account enter a portion of the account description or code and press the *Tab* key. You will be shown a standard choice list if more than one account matches what you typed.

SMS settings: These settings concern the item and SMS messages from mobile phones.

SMS code: This is the code that will be entered in an SMS to refer to the item. Keep the code short and unique! If you change this code you must notify all the users who send SMS messages to mSupply about the new code, otherwise they will not know how to refer to this item in their SMS messages. Because of this, you can only change this item after you 'unlock' the padlock next to it by clicking on it. When you unlock the padlock you will be shown a warning that SMS users must be told about the new code.

SMS pack size: The pack size to use to convert the pack size quantities entered in an SMS message into item quantities. You must enter a value greater than or equal to 1 for this if you have entered an SMS code. Otherwise this field is ignored.

#### Price list

**On Price list:** If this box is checked, this item will be included when the price list is produced - refer Other Reports.

Catalogue price: The price for the item that will be used when you produce the price list

Catalogue pack size: The pack size for the item that will be used when you produce the price list



The Catalogue pack size can differ from the preferred pack size on the General tab

# Usage tab

neral	🖬 Item name	CONDOM, male, lubr., 53mm width	, natural, WHO/UNFPA Prequ	alified, pce	Store:	-
sc	ltem code	M01.01.000			Date: 06/02/2	2023 - 05/02/202
age	Year-Month	Consumption	Mean Sto	ock	Days ou	at of stock
ock	2025-02		0	9000		0
dger	2025-01	500	0	10419		0
iotes	2024-12	200	0	14581		0
ckorders	2024-11	906	0	20347		0
tes	2024-10	2400	0	26854		0
concile	2024-09	1306	0	46070		0
of materials	2024-08	250	0	7323		0
chase Orders	2024-07	100	0	8903		0
ler options	2024-06	100	0	9900		0
pensing	2024-05	350	0	12645		0
orting	2024-04	250	0	15917		0
	2024-03	400	0	18339		0
uisitions	2024-02	232	0	21200		0
res						
codes	Months	Mean usage Standard dev	🖉 🖂 Includa huilde			
stom data	24	3280.167 5311.943	include builds			
ster lists						Show projection
eractions		( the second second	Committee C	Projections		
	Forecasting	Show graph	Consumption	-de-		ave projection
	rorecuseing			Add year		are projection
	When calculating f	uture consumption:		ring frai	from column	
	<ul> <li>Use historical</li> </ul>	Average Monthly Consumption (AMC)		Conv values	from column	Consumptio 👳
	<ul> <li>Use historical.</li> </ul>	AMC increased by a factor of:	0 %		to column	ProjectionB 0
	<ul> <li>Use a fixed, es</li> </ul>	stimated AMC of:	0 items/month	and the second s		
	<ul> <li>Use projection</li> </ul>		0		of Projectio	ProjectionA 2
	- use projection		<u> </u>		by	0

The Usage tab allows you to view the item usage per month for the previous 24 months. This information is very useful for quickly spotting a trend in usage for a particular item.

Below the list of usage for each month there is a drop down list to choose from 1 to 24 months. After choosing a value, the **Mean** (average) **usage** and **Standard deviation** figures will be updated to give the figures for the period chosen (the period is from the selected number of months ago to the current day).

**Refresh usage button:** This button allows you to update the usage with transactions that were added since you opened the window (this applies to multi-user mode). It also allows you to show the usage with or without build transactions included in the totals, depending on whether or not the **Include builds** checkbox is checked.

**Show Graph button:** Clicking this button shows the same information in a graphical format:

General Storage Misc	8	Item name (COVID-19) Cepheid Xpert Xpress SARS-CoV-2, 10 T Item code 106119XU208T	iests Store:	CHSC-PSM Haiti Wall 0 14/09/2022 - 13/09/2024
Usape Stock Ledger Quotes Backorders Notes Reconcile Bill of materials Purchase Orders Order options Dispensing Reporting Log Reporting Log Requisitions Stores Barcodes Custom data Master lists Interactions			11 2004 1000 2004 1004 2006 2004 2004 2004	Comungéo is 34 monte
Delete		OK & Previ	ous OK & Next C	incel OK

One coloured set of bars shows the usage for the current year, another coloured set shows the usage for the previous year (if data is available).

# Stock tab

neral Irage sc	0 0	item item	name Ar	nitriptyli ntr25t	ne 25mg	Tabs						Store: Cent	ral Contra	cepti d
age Ick İger	Sho	🔣 w zero line	s Pri	nt.	Jan Split	Upda	sell pric	:85	Show related invoices	Co	X nsolidate	Labels	Print I	arcode la
otes ckorders	Line	Available packs	Total packs	Hold	Pack size	Batch	Expdate	Supplier	Manufacturer	Location	Cost Price	Sell Price	Status	Total
tes	1	10400	14800		1	140426	30/4/17	invad		A501	0.00	8.46		0
oncile	2	60000	60000		1	140613	30/6/17	BAD		AS01	0.00	8.46		0
of materials	3	12000	12000		1	140615	30/6/17	BAD		AS01	0.00	8.45		0
chase Orders	4	48000	48000		1	140610	30/6/17	BAD		A501	0.00	8.45		(
er options	5	12000	12000		1	140617	30/6/17				0.00	0.00		0
ensing														
orting														
isitions														
es														
odes														
om data	Stor	ck							No	on stock iten	15			
cer lists	N	linimum st	lock		0 Maximum stock 0			0 Non stock item				Chack Indone		
actions	1	Stock on h	and		0 Total stock value 0			0.00 Default customer			Check ledger			
	3	stock on o	rder		0 Average unit cost									
						Total V	(olume	0	.00					
	Mo	nths Cover												
		Rased on	0	8	months	usage	Calculate		Exclude	stock with	expire date l	ess than	3	onths
		04300 011	÷	<b>-</b>	111011113	usuge	canculate		Exclude	Cane	ating an and	ar for	0 0	onthe
		F	or stock	on hand		(mc	onths cover	2		Gener	acing an ore		st	ock
		Includin	g stock	on order		(mo	onths cover	9		will o	rder a quant	ity of		
													_	

The "Stock" window shows the lines of stock for this item together with the stock on hand. mSupply® will calculate how many days this stock will last, based on your usage over a number of months - you

can specify how many months.

If you have turned on any of the custom stock fields in store preferences they will be displayed as columns (between the Supplier and Manufacturer columns) in the list of stock lines on this tab and the information you entered for these fields when the stock was received will be shown in the appropriate cells.

**Show zero lines:** This button will show all the lines that are still in your data file, but which have no stock on hand. If you can think of a use for this information, please let us know! When you click the button the button title changes to "hide zero lines", which allows you to get back to the info you really wanted.

**Splitting:** There may be occasions when you need to split your stock- e.g. if you are moving it, say, from a store to a dispensary or clinic, or when you are repacking some stock; select the line to be split, and click on the Split icon to show a window allowing you to enter the quantity to be split, the new location, and - if applicable - the new pack size.

In the example shown, 2 packs of 1,000 Erythromycin tablets are being transferred to a new location, and the `outer' of 1,000 ( actually 10 x100 shrink wrapped together) is being opened to yield 10 individual packs of 100.

Repack stock			×
Quantity to split	2	of	37
New shelf location A.02.E1			
New pack size	100		
When you click OK a new repreflects the change in stock automatically Print location movement representation and the stock of the stock	pack tr will be port	ansactio created	n that
Cancel		Oł	

**Update sell prices:** Clicking on this icon will update the selling prices of the highlighted line(s). mSupply® will use the figure entered in the **Default sell price of preferred packsize** field in the **General** tab, which must show the updated price before this will take effect. If you make use of the **Default margin** field, and you update this figure, then Supply® will calculate the updated sell price using it. Note that mSupply® looks first in the **Default sell price ...** field, and any figure entered there takes precedence.

**Labels:** Clicking this button will print shelf labels for the highlighted stock line(s). The shelf label includes the location, the item name and code, and the batch and expiry. Here's a (bad) example

Suture Braide Curved W9527T	Code: 35_6519 Synth Abs Violet d 2/0 (M3) 75cm 26mm Rev Cut Box/12
Batch: b870d5	wel3 Expiry: 1/1/16 helf location: CON16

#### Show related invoices

Highlight a line then click on this button to display a list of transactions which used this particular line.

#### Consolidate

You can consolidate (join 2 stock lines together) if they have

- The same batch #
- The same expiry
- The same pack size
- Are at the same location

If 2 stock lines you want to consolidate are at different locations, edit one of the stock lines to move it to the location of the other stock line, then consolidate. This reflects what you would have had to do physically anyhow!

- 1. Hold down the control key (command on Mac)
- 2. Click on the two lines you want to consolidate
- 3. Click consolidate
- 4. If the two stock lines are at different locations you'll be warned and asked if you want to continue.
- 5. You're shown this window

Batch	B302WV	Batch	B302WV
Pack size	50	Pack size	50
Location	BID	Location	INJ
Expiry date	30/3/15	Expiry date	30/3/15
Quantity	40	Quantity	1
Available	40	Available	1

0

- 6. Choose which stock line to keep.
- 7. Click **OK**

Doforos

#### An example:

	-	(				[ e		[	-		-			
	1	l	9		<b>_</b>	-	>		<b>1</b>		🐢			
Shov	v zero lin	es P	Print	5	plit	Update se	ell prices	Show relat	ed invoices	5 Coi	nsolidate			
Line	Available	Total	Pack	Hold	Batch	Expdate	Supplier	Manufac	Location	Cost Price	Sell Price	Status	Total Volume	
1	13550	14000	1		1004103	30/4/13	bouchm	YXKP	IN,	0.12	0.12			
2	399	399	50		B302WV	30/3/15	bouchm	dochemie	BID	32.96	32.96			
					B302WV	30/3/15	bouchm	dochemie	BID	32.96	32.96			
4	1	1	50		B302WV	30/3/15	invad		IN,	0.00	0.00			
ter:	•		]	•		9								
ter:	ero lines	Prin	ıt.	Spl	u it	S Update sell	prices S	how related	d invoices	Con	solidate			
ter:	▶ ero lines iilable∣ T	Prin Fotal   P	It Pack   F	Spl	u it Batch ∣	S Update sell Expdate	prices S Supplier M	how related	d invoices Location	Con: Cost Price	solidate Sell Price	Status	Total Volume	
ter:	ero lines iilable T 13550 1	Prin Fotal   P	it Pack   F	Spl Hold	it Batch 004103	Update sell Expdate 30/4/13	prices S Supplier M bouchm	how relate Manufac	d invoices Location I	Con Cost Price	solidate Sell Price   0.12	Status	Total Volume	
ter:	ero lines iilable T 13550 1 399	Prin Fotal P 14000 399	it Pack   F 1 50	Spl Iold	t Batch 004103 B302WV	Update sell Expdate 30/4/13 30/3/15	prices S Supplier M bouchm bouchm	how related Manufac YXKP dochemie	d invoices Location INJ BID	Con Cost Price 0.12 32.96	solidate Sell Price   0.12 32.96	Status	Total Volume	
ter:	ero lines iilable T 13550 1 399 41	Prin Fotal P 14000 399 41	it Pack   F 1 50 50	Spl 10ld	it Batch 004103 B302WV B302WV	Update sell Expdate 30/4/13 30/3/15 30/3/15	prices S Supplier M bouchm bouchm invad d	how related Manufac YXKP dochemie dochemie	d invoices Location I INJ BID BID	Con: Cost Price 0.12 32.96 32.96	solidate Sell Price   0.12 32.96 0.00	Status	Total Volume	
ter:	ero lines iilable T 13550 1 399	Prin Fotal P 14000 399	it Pack F 1 50	Spl 10ld	it Batch 004103 B302WV	Update sell Expdate 30/4/13 30/3/15	prices S Supplier M bouchm bouchm	how related Aanufac YXKP dochemie	d invoices Location I INJ BID	Con Cost Price 0.12 32.96	solidate Sell Price   0.12 32.96	Status	Total Volume	
ter:	ero lines iilable T 13550 1 399 41	Prin Fotal F 14000 399 41	it Pack   H 50 50	Spl Iold	it Batch 004103 B302WV B302WV	Update sell Expdate 30/4/13 30/3/15 30/3/15	prices S Supplier M bouchm bouchm invad	how related Manufac YXKP dochemie dochemie	d invoices Location I INJ BID BID	Con Cost Price   0.12 32.96 32.96	solidate Sell Price   0.12 32.96 0.00	Status	Total Volume	

# Other information on the stock details page

#### Stock

<u>Minimum stock</u>: The minimum stock you wish to keep on hand. Note that you do not need to enter a quantity here for mSupply®'s ordering system to work. In fact, it is better in most cases to leave this number set to zero. This field should only be filled in if you absolutely must keep a minimum on hand. For example, if you stock naloxone for narcotic over dosage reduction, and even if you only use 1 vial every year, you have decided you need to keep five vials on hand, you would enter "5" as the minimum quantity for naloxone.

Stock on hand: The total stock of this item on hand.

Stock on order: The total quantity of stock of this item on order from suppliers

#### Non-stock items

If this is a non-stock item, you can check this check box. If there is one, you can specify the default customer for the item, otherwise leave this box blank. For more on this topic see Non-stock items

#### Months Cover

You can use this calculator to estimate the time left until the stock of this item runs out. The values which appear estimating the time it takes to use the stock on hand (and on order) are calculated from the average usage of the last few months. You can choose the number (from 1 to 24) of months used to calculate this in the drop down list.

If you would like to know how much stock to order so that you have enough for the next few months, enter the number of months you would like stock for. After entering or changing any or all of these values, click **Calculate** to see the results.

# Editing a stock line or viewing more stock line details

To edit the cost price and selling price for an item line, double-click the line you wish to edit.

#### The Item stock line details window is displayed:

Item code say104	4 Item	name Sayana Press 16	0mg/ml 200°0.65	ml	
		General Ledger Status	Reference docume	nts Log	
Quantity accord	ding to stock				
Total Quanti	ity 1289			Available 0	
Cost price	2.6			Valuma nas nask	
Cost price	2.5	Hold		volume per pack	ms
Sell price	2.5	Location	None	Weight per pack	) kg
Expiry date	31/03/2028	Pack size	1 e	ach	
Batch	ABCD1234	Quan per inner	1	Initial quantity 0	
Supplier	UNFPA	Inners per Outer	1		
Donor				Program Please select	0
Note					
Curton	s stock fields				
Custon	I SLOCK HEIUS				

#### Stock lines > General tab

This tab shows the details of a stock line. It also gives you total and available quantity of that stock line.

**Hold checkbox:** To hold a stock line, check the *Hold* check-box. Once an stock line is held, it cannot be issued. It will still appear in the available stock window, but held stock lines will have a check box in the hold column, and if a user attempts to issue from the stock line they will be informed that the stock line is on hold.





#### Stock lines > Ledger tab

This tab shows a list of transactions (supplier and customer invoices, inventory adjustments etc.) for the item being viewed. You can use this window to see a list of customers who have been supplied with this particular item:

		G	eneral	Ledge	r	Status Refe	rence docum	ents				
Quantity acco	rding to	stock										
Total Quant	ity 2358	300						Availab	le 235	700		
Date	Invoice	Name	Туре	In/Out	s	Expiry	Batch	Quan	Pack	Cost	Sell	Exten
09/05/2017	112	Inventtments	si	in	cn	28/02/2019	6MC130	2250	100	0	0	
14/06/2017	137	Inventtments	si	in	cn	28/02/2019	6MC130	108	100	0	0	
	1712	34 Milospital	ci	out	sg	28/02/2019	9 6MC130	1	100	0	0	
											_	
					_							
Item stock li	ne ledge	,										
Total Quar	ntity 235	800						Availa	ble 23	5700		
								Citra Ina				
Reconcile fro	om start o	of year										
Total Quar	ntity 235	800						Availa	ble 23	5700		

The *In/Out* column tells you whether the transaction on that line brought stock in to, or took stock out of, mSupply.

#### Stock lines > Status tab (vaccine vial monitoring)

A window appears with 4 columns:

- Date
- VVM status
- Entered by
- Comment

There are two buttons:

• New

• Delete.

This has been specifically designed to use the Vaccine Vial Monitoring (VVM) feature. All vaccines requiring cold storage bear a VVM label which registers cumulative heat exposure over time; the combined effects of heat and time cause the inner square of the label to darken gradually and irreversibly. A comprehensive description of VVM is available in WHO's pdf document accessible. Stock lines of vaccines should have their status VVM labels regularly checked, and assigned to the relevant status; Clicking on the *New* button allows the details to be recorded.

🐅 New Status	
VVM status Date	21/05/03
VVM status Comment	
	Cancel OK

Should a stock line of vaccines have the status 3 (or 4), the Hold checkbox under the **General** tab should be checked.

#### Stock lines > Reference documents tab

eneral Ledger Status	Reference documents				
•	*				
Upload document	Delete document	Download document	Show:	Show All	•
File Nam	e Created by	Created on	Saved on	Version no	*

The standard Document Management window appears. See Reference documents for more information on the use of such documents.

# Ledger tab

The item **Ledger** tab lists individual transactions for the item in question. By default is shows all transactions for the current year:

Itons         Itons         Fit           100/2016         3197           100/2016         3197           100/2016         3197           100/2016         3197           100/2016         3197           100/2016         3197           100/2016         3197           100/2016         3197           100/2016         3197           100/2016         3197           100/2016         3197           100/2016         3197           100/2016         3197           100/2016         3197           100/2016         3197	om 01/01/2016 To 31/ Name Warehouse Warehouse Warehouse Warehouse Warehouse Warehouse Warehouse Warehouse	12/201 Sta fn fn fn	6 Last year Expiry Bate 31/0018 14E07 31/0018 14E07 31/0018 14E07	Store: Ch Quan 6 100800 4 302400 9 90220	Ware Print Pack	h 0 Total 1008
20006 tions  Findate Inv # 7/06/2016 3197 7/06/2016 3197 7/06/2016 3197 7/06/2016 3197 7/06/2016 3197 7/06/2016 3197 7/06/2016 3197	om 01/01/2016 To 31/ Name Warehouse Warehouse Warehouse Warehouse Warehouse Warehouse Warehouse Warehouse	Sta fn fn fn	6 Last year Expiry Bate 31/0018 14E07 31/0018 14E07 31/0018 14H06	ch Quan 6 100800 4 302400	Print Pack	Total 1008
tions Findate Inv # 7/06/2016 3197 7/06/2016 3197 7/06/2016 3197 7/06/2016 3197 7/06/2016 3197 7/06/2016 3197 7/06/2016 3197	om 01/01/2016 To 31/ Name Warehouse Warehouse Warehouse Warehouse Warehouse Warehouse Warehouse Warehouse	Sta fn fn fn fn	6 Last year Expiry Bat 31/0018 14607 31/0018 14406 31/0018 14406	Ch Quan 6 100800 4 302400	Print Pack	Total 1008
tions	om 01/01/2016 To 31/ Name Warehouse Warehouse Warehouse Warehouse Warehouse Warehouse Warehouse Warehouse	Sta fn fn fn fn	6 Last year Expiry Bat 31/0018 14607 31/0018 14407 31/0018 14406	ch Quan 6 100800 4 302400	Print Pack	Total
firm date Inv # 7/06/2016 3197 7/06/2016 3197 7/06/2016 3197 7/06/2016 3197 7/06/2016 3197 7/06/2016 3197 7/06/2016 3197	Name Warehouse Warehouse Warehouse Warehouse Warehouse Warehouse	Sta fn fn fn fn	Expiry Bat 31/0018 14E07 31/0018 14E07 31/0018 14H06 31/0018 14H06	ch Quan 6 100800 4 302400 9 90730	Print Pack	Total 1008
firm date Inv # 7/06/2016 3197 7/06/2016 3197 7/06/2016 3197 7/06/2016 3197 7/06/2016 3197 7/06/2016 3197 7/06/2016 3197	Name Warehouse Warehouse Warehouse Warehouse Warehouse Warehouse	Sta fn fn fn fn fn	Expiry Bat 31/0018 14E07 31/0018 14E07 31/0018 14H06 31/0018 14H06	ch Quan 6 100800 4 302400 9 90720	Pack 1	Total 1008
7/06/2016 3197 7/06/2016 3197 7/06/2016 3197 7/06/2016 3197 7/06/2016 3197 7/06/2016 3197 7/06/2016 3197	Warehouse Warehouse Warehouse Warehouse Warehouse Warehouse Warehouse	fn fn fn fn fn	31/0018 14E07 31/0018 14E07 31/0018 14H06 31/0018 14H06	6 100800 4 302400	1	1008
7/06/2016 3197 7/06/2016 3197 7/06/2016 3197 7/06/2016 3197 7/06/2016 3197 7/06/2016 3197	Warehouse Warehouse Warehouse Warehouse Warehouse Warehouse	fn fn fn fn	31/0018 14E07 31/0018 14H06 31/0018 14H06	4 302400	1	
7/06/2016 3197 7/06/2016 3197 7/06/2016 3197 7/06/2016 3197 7/06/2016 3197 7/06/2016 3197	Warehouse Warehouse Warehouse Warehouse	fn fn fn	31/0018 14H06	90720	1	302
7/06/2016 3197 7/06/2016 3197 7/06/2016 3197 7/06/2016 3197	Warehouse Warehouse Warehouse	fn fn	31/0_018_14H06	5 50720	1	90
7/06/2016 3197 7/06/2016 3197 7/06/2016 3197 7/06/2016 3197	Warehouse Warehouse	fn	31,0010 14H00	57 100800	1	100
7/06/2016 3197 7/06/2016 3197 7/06/2016 3197	Warehouse		31/0018 14A02	7 10080	1	10
7/06/2016 3197	Statement and statement of the statement	fn	31/0018 14E07	3 201600	1	2010
/06/2016 3107	Warehouse	fn	31/0018 14H06	58 50400	1	504
100/2010 319/	Warehouse	fn	28/0018 14802	7 100800	1	100
//06/2016 3197	Warehouse	fn	31/0018 14A02	8 30240	1	30
//06/2016 3197	Warehouse	fn	31/0018 14E07	5 319200	1	319
//06/2016 3197	Warehouse	fn	28/0018 14802	6 8610	1	8
//06/2016 3197	Warehouse	fn	28/0018 14802	6 122430	1	122
/09/2016 3321	Inventory adjustments	fn	31/0018 14H06	57 -100800	1	100
//09/2016 3321	Inventory adjustments	fn	31/0018 14A02	-30240	1	30
//09/2016 3321	Inventory adjustments	fn	31/0018 14E07	5 -131040	1	131
//09/2016 3320	Inventory adjustments	cn	31/0018 14E07	6 20160	1	20
//09/2016 3321	Inventory adjustments	fn	28/0018 14802	6 -1470	1	14
//09/2016 3321	Inventory adjustments	fn	31/0018 14H06	58 -50400	1	504
//09/2016 3321	Inventory adjustments	fn	31/0018 14E07	4 -100800	1	1008
//09/2016 3321	Inventory adjustments	fn	31/0018 14E07	3 -80640	1	806
7/09/2016 3321	Inventory adjustments	fn	28/0018 14802	6 -8610	1	86
//09/2016 3321	Inventory adjustments	fn	31/0018 14H06	-90720	1	907
//09/2016 3321	Inventory adjustments	fn	28/0018 14802	7 -100800	1	1008
//09/2016 3320	Inventory adjustments	cn	31/0018 14A02	7 120960	1	1209
7/09	9/2016 3321 9/2016 3321 9/2016 3321 9/2016 3320	9/2016 3321 Inventory adjustments 9/2016 3321 Inventory adjustments 9/2016 3321 Inventory adjustments 9/2016 3320 Inventory adjustments	9/2016 3321 Inventory adjustments fn 9/2016 3321 Inventory adjustments fn 9/2016 3321 Inventory adjustments fn 9/2016 3320 Inventory adjustments cn	9/2016         3321         Inventory adjustments         fn         28/0018         14802           9/2016         3321         Inventory adjustments         fn         31/0018         14H06           9/2016         3321         Inventory adjustments         fn         28/0018         14H06           9/2016         3321         Inventory adjustments         fn         28/0018         14B02           9/2016         3320         Inventory adjustments         cn         31/0018         14A02	9/2016         3321         Inventory adjustments         fn         28/0018         148026         -8610           9/2016         3321         Inventory adjustments         fn         31/0018         14H069         -90720           9/2016         3321         Inventory adjustments         fn         28/0018         14B027         -100800           9/2016         3320         Inventory adjustments         fn         28/0018         14A027         120960	9/2016         3321         Inventory adjustments         fn         28/0018         148026        8610         1           9/2016         3321         Inventory adjustments         fn         31/0018         14H069         -90720         1           9/2016         3321         Inventory adjustments         fn         28/0018         14B027         -100800         1           9/2016         3320         Inventory adjustments         cn         31/0018         14A027         120960         1

The **Type** column has a shorthand label for the type of transaction:

- si = supplier invoice and inventory adjustment to increase the amount of stock
- ci = customer invoice column describe
- sc = supplier credit or inventory adjustment to reduce the amount of stock
- cc = customer credit

Note that all supplier lines have a grey background and customer lines have a white background to help you identify them easily.

The **Quan** column shows the number of packs of pack size shown in the **Pack** column that were involved in the transaction.

As a quick indicator, if the transaction reduced the amount of stock in mSupply then the number is negative.

#### Filtering the ledger list

Show: all transactions	-	From 1/01/2015	To 26/03/2015	This year	-

Two drop down lists are available to filter the transactions you see in the table:

You can use the **Show....** drop-down list to show:

- All transactions (the default)
- Only supplier transactions (supplier invoices)
- Only customer transactions (customer invoices)
- Inventory adjustments
- Repacks
- Transactions whose status is `New'
- Transactions whose status is `Suggested'
- Transactions whose status is `New or suggested'
- Transactions for just one name (click on a transaction line for the name you are interested in)
- Transactions for one particular item line. This will show the supplier invoice on which the item line was received, and all subsequent issues of that item line to customers.
- Same batch as selected this will show all the supplier invoice on which the batch was received, and all subsequent issues of that batch to customers. This can be useful for tracing a particular batch of medicines.

The other drop down list allows selection from a variety of periods during which transactions occurred.

This year 📃 👻	
Today	
_ Yesterday	
E This week	
30 Last week	40
24 This month	40
Previous month	
<sup>34</sup> Two Months ago	po
30 This quarter	40
3d Previous quarter	
This year	
<sup>34</sup> This month last year	1
34 Previous month last year	r 50
30 This quarter last year	50
Previous quarter last yea	rhol
T Last year	
30/12/11 07D01	20

Clicking on the column headings of the transaction list will sort the list by the information in that column. The column header will be underlined to show by which column the list is sorted.

If the cost price column is blank, this is because the current user does not have permission to view cost prices. (This option can be turned on or off for each user from the "File > edit users..." menu item).

If you want to view an invoice for one of the displayed lines, simply double-click the line you are interested in. The invoice (or payment, as the case may be) will be shown in a new window.

#### Printing the ledger list

1 Ledger Print	×
Displayed	
C Ledger	
Stock Movement	
	Cancel OK

Clicking this button will give you the following printing choices:

- the information currently displayed in the window
- a complete ledger from the start of your year
- stock movement for a specific period or between two dates of your choice

Ledger Print	<b>EX</b>
<ul> <li>Displayed</li> <li>Ledger</li> <li>Stock Movement</li> <li>Stock Movement Options</li> </ul>	
From 01/03/11 To 31/05/11	Today Today Yesterday
Open report in Excel	Last week This month Previous month
	Two Months ago This quarter Previous quarter This year This month last year
	Previous month last year This quarter last year Previous quarter last year Last year

# **Quotes tab**

ineral isc	ß	Item name	Grise	ofulvin	1250	ng tab						Store: G	eneral	-	
age		-		•											
doer		•					A.H.			1					
uotes	New	rquote L	elete	quote		snow:	All		-	1					
ckorders	Date	Supplier	Cu	Rate	Price	Pac_	Freight	Strip	Cost	Adj Cost	Preferred	Valid Until	Manufact	Comment	-
tes	20/02/09	Watan Dig	AUD	1.0000	35.05	1000	1.10		35.05	0.0350				Malaysia	
concile	26/02/09	Angen Parl	AUD	1.0000	21.60	100	1.00		21.60	0.2160		26/04/09	Sigma	air. aus	
of materials	25/10/08	international	USD	0.9468	20.41	1000	0.00		0.00	0.0000	1				
chase Orders		Angen Pari	AUD	1.0000	19.00	100	0.00		19.00	0.1900			Sigma		
der options	26/10/09	international	EUR	1.4235	11.62	1000	0.00		16.54	0.0165	1				
pensing		Makan Dra	AUD	1.0000	0.00	1000	0.00		0.00	0.0000					
orting	28/10/09	ROUCHER 1	AUD	1.0000	24.35	1000	0.00		24.35	0.0243					
1		Makhan Er	USD	1.0008	0.00	1000	0.00		0.00	0.0000					
r		Angen Py i	AUD	1.0000	90.00	1000	0.00		90.00	0.0900			CSPC		
	13/11/09	1 married and	USD	0.9468	0.01	1	1.00		0.01	0.0159					
															,
	4													+	
Delete								0	K & Previo	NUS	OK & Ne	xt	Cancel	ОК	

A quotation is a record of a price you have been given by a supplier. For each item you can have multiple quotes recorded, reflecting different prices you have been quoted from different suppliers, or even different prices from the one supplier for different pack sizes.

When you come to compare quotes, there are several factors that need to be taken into account. By entering the information in mSupply® you are able to find the best price once these factors have been taken into account, and you build a history of quotations from each supplier.

The date until which the quote is valid is displayed, and you can choose to display all quotes, or currently valid quotes.

There may be occasions when a supplier has quoted for an item from two or more manufacturers, and in such cases, the manufacturer's name will appear in the column headed *Manufacturer*.

**Cost:** Cost is the price for that pack size in your local currency, taking into account the freight factor and the exchange rate.

**Adjusted cost:** Adjusted cost is the price for your "preferred pack size" you have entered for that item. This second price allows for a direct comparison between suppliers. Note that if you change the "preferred pack" for an item, all your quotes will be updated to reflect the new pack size.

**Comparing quotes::** Click "Adj cost" heading in the list of quotes to bring the cheapest quote to the top of the list.

# Add a new quote

Click the "new quote" button. The quotes input window will open

			Add nev	v quote		
General					Price break	
Date	29/12/16			aci200t	Price break quantity	0
Item	Aciclovir 200r	ng tab			Discount	0
Supplier					Price break notes	
Price	0.0000	Valid until	00/00/00			
Pack	0	Currency	NPR			
Freight factor	1	Rate	1		Freicht	
Net cost	0.00	Rate to use	1.00		Preferred pack	0
Strip pack		Supplier item code			Freight for preferred pack	0
Preferred		Supplier bar code			Freight notes	
Comment						
					Const	OK
					Cancel	OK

- Type as much of the supplier code as you know, then press the **Tab** key- you will be presented with a list of suppliers if there is more than one to choose from.
- Enter the price and the pack size in the currency you have been quoted.
- Note that the currency and freight factor are filled in with the information you have entered for the supplier.
- If the supplier has quoted in a different currency to the supplier's default currency, you can change the currency for this quotation from the drop-down list on the right.
- The freight factor is the factor you need to add to the supplier's prices to account for delivery costs. If your supplier includes these costs in the quoted price (i.e. prices are "CIF"), the freight factor for the supplier should be set to "1". If your supplier adds freight that amounts to about 15% of the invoice price, set the freight factor to 1.15.

**Strip pack:** This check box allows easy identification of quotes that are for strip/blister packed items (as opposed to "loose" items).

**Preferred:** This check box allows you to identify one (or more) suppliers as the preferred supplier for the item. One of the ordering methods uses the "preferred" check box to indicate which items should be considered for ordering from a particular supplier. See Ordering from suppliers for more details.

**Supplier code:** If you are using electronic invoice transfer, you must use this field to record the code for the item that this supplier uses on their electronic invoices.

Supplier bar code: Here you can record the bar code identifier for this product.

**Price Break:** Enter the quantity that generates a price break along with the percentage discount that will apply once this quantity is reached.

**Freight:** Enter the value for the preferred pack (outer pack) and the freight for that pack provided by the supplier.

Click OK to accept the details, or cancel if you decide not to add a quote for this item.

#### To modify a quote:

Double-click the line you want to edit.

In the window that appears you can change the date, the supplier, the price, the pack size, the **Strip** check box, or the **Preferred** check box.

#### To delete a quote:

- Click on the quote line you wish to delete
- Click the **Delete quote** button
- Confirm that you want to proceed

# **Backorders tab**

•••			Iten	n details			
General Storage Misc Usage Stock Ledger	Item name     Item code     Item code     New backorder	Ethambutol 400mg, Tal Ethb400mt Delete backorder(s)	25			Store: General	0
Quotes	Name	Code	Order Date	Quantity	Com	ment	
Backorders	World Food Programe	WFP	18/10/2021	1000			
Reconcile							
Rill of materials							
Purchase Orders							
Order options							
Dispensing							
Reporting							
Log							
Requisitions							_
Stores							
Barcodes							_
Custom data							
Master lists							
Interactions							
	Stock on Backord	er from customers	1000				
Delete				ОК	& Previous OK & Next	Cancel	ОК

You can view the backorders for an item here. To edit a backorder, double-click the line you wish to edit.

🏚 Modify Ba	ckorder	
Item	Atenolol 50mg tab	
Customer	Bairiki Clinic	TD05
Order date	22/02/11	
Quantity	1000	
Comment		
	Cancel	OK

To add a new backorder for this item, click the **New backorder** button. This window will be shown:

Item Atenolol 50mg tab Customer Order date 21/06/11 Quantity 0 Comment Cancel OK	x
Customer Order date 21/06/11 Quantity 0 Comment Cancel OK	
Order date 21/06/11 Quantity 0 Comment Cancel OK	
Quantity 0 Comment Cancel OK	
Comment Cancel OK	
Cancel	
Carlosi OK	

- Enter part of the customer name, then press **Tab** to search for the customer.
- Enter the order date, quantity and any comment, then click **OK** to save the new backorder entry.

To delete a backorder, click the line you wish to delete, then click the **Delete backorder** button.

The total stock on backorder is shown below the list.

# Notes tab

eneral	E Item name	Rapitidine 150mg tab		Store	General	-
lisc	a nem mane	Name Loong ab		June.	General	
sage						
tock		26				
edger	New note	Delete note				
uotes	inch note	belete note				
ackorders	Data Diraja	Nete				
otes	Lit op dit al	Held this item and issue Omen	anala lastan d			
econcile	11/08/11 al	Hold this item and issue Omepi	azole instead.		^	
ill of materials						
urchase Orders						
rder options						
ispensing						
eporting						
g						
ST						
Delete						
Delete			OK & Previous OK &	k Next	Cancel	ОК

You can add and edit notes for an item here.

Click the **New note** button to add a note. A note can be up to 32,000 characters.

Date	23/06/11	Entered by : Sussol	Modified by	
Note	No more than 30 tab	lets to be supplied to individual p	atients until new stock arrives.	
Displa	never never	Pick Color Beep	0 times	

The date on which you are entering the note is already completed, and in the main panel you should type in the wording of the note itself. In the lower left of the window is a drop-down list offering various choices concerning the displaying of the note on screen; it may appear as an alert when this item is issued on a customer invoice, received on a supplier invoice, or, if **all** is chosen, it will display for both customer and supplier invoices.

Display	never Pick Color
	never
	customer invoice supplier invoice
	Purchase order is created

You may also set the background colour of the note, but as the text is always black, dark colours should be avoided. A further option allows you to have one or more audible `beeps' sound when the note is displayed. Each note will display according to the attributes set for it, independently of other notes defined for the same item.

Subsequently, when the item is selected (depending on the specified display settings), the note will appear on screen; be aware that the note does not disappear automatically - you must close it/them manually.

To edit a note, double-click the note in the list you want to edit.

# **Reconcile tab**

eneral						
Aisc	Filtern name Chlorampher	icol 1% eye oin	t	Stor	re: General	Ŧ
Isage						
tock	Stock & ledger reconciliation					
edger				-		
Quotes	Opening stock:	0		<b>_</b>		
lackorders	Plus Received since open	46096	Calc	ulate now		
lotes						
econcile Sill of materials	Total stock in =	46096				
urchase Orders	Minus stock issued	45596				
Order options	Stock (by ledger) =	500.00	On pack slps (ledger	200		
Dispensing	Stock on hand (stock	500.00	On pack slps (stock)	200	-	
og ST						

Clicking the **Reconcile** button will give a summary of usage.

It is useful for checking mSupply® is working as it should be! If you get an error here it is most likely due to your using mSupply® when a power failure occurred. In multi-user versions we are able to provide you with a log file that will allow you to incorporate transactions entered even if a power failure has occurred. In normal use, with a UPS, mSupply® will automatically save data and you will not see an error here.

# Bill of materials tab

This may not be showing if you do not have a registration for mSupply® that enables manufacturing, or the buttons may



be dimmed so you can not make entries if your user permissions do not allow you to view Bills of Materials.

🌆 Item details		
General Misc	Item name Antacid mixture	Store: General 🕞
Usage Stock Ledger	New Ingredient Delete Ingredient Print 1 Use a bill of materials to	o manufacture this item 🔽
Quotes	Line Item Units	Quantity ^
Backorders		
Notes		
Reconcile		
Bill of materials		
Order options		
Dispensing		
Reporting		
Log		
CST		<b>T</b>
	Tip: Drag and drop line to re-order the bill of quantities Quantity of finished product this bill of materials is fo	n 0 ml 👻
	Manufacture Method	A
		-
Delete	OK & Previous	OK & Next Cancel OK
		an .

Here you can specify a Bill of Materials for the item if it is a manufactured item. Once you have done so, and have checked the **Use a Bill of Materials to manufacture this item** check box, when you enter a new build, it can be automatically filled out with the correct materials (ingredients) and the correct quantities for the total to be manufactured.

**Use a bill of materials to manufacture this item:** If this check box (1) is **not** checked, the bill of materials (if one has been entered) will not be used when manufacturing builds.

**New ingredient:** This button(2) allows you to add items to the bill of materials.

You will be shown a window like this:

s Add ingredient		
Item name Magnesium tr Item code mtp 3Quantity	isilicate Jm Cancel	ОК

Enter the start of the item name or code then press the Tab key. If only one matching entry is found,

you can then enter the quantity. otherwise you will be shown a list of matching items. Double-click the item you wish to use.

Click the OK button when you have finished, and the item will be added to the bill of materials for the item you are editing.

Note: (3) Be careful to enter quantities corresponding to the units you have specified for the item.

**Delete ingredient:** To delete an ingredient, first click on the ingredient you wish to delete so that it is highlighted, then click this button.

**Print:** This button allows you to print the bill of materials that is displayed.

**Quantity of finished product this bill of materials is for:** This is the total quantity of this item that will be produced by the bill of materials that is entered for the item. Be careful to set this quantity and the units correctly.

**Manufacture Method:** This panel may be used to record the steps in the manufacturing process. When you are entering a build you have the option to print the manufacture method along with the build ingredient list. For more information see Building (Manufacturing) Items

# Purchase orders tab

00			ltem d	letails						
General Misc Usage	🗊 Item name AMOX	YCILLIN 250M	G TAB/CAP				Store	CMS Store	2	<b>*</b>
Stock Ledger Quotes	Show all orders	\$								
Backorders	Supplier	Order Sta	Creation D	Confirm	R D Date	E D Date	Org Quan	Adj Quantity	Recv Qua	P S Orde
Notes	IDA PACIFIC	302 cn	8/01/13	8/01/13	8/01/13		100000	100000	100000	
Reconcile	IDA PACIFIC	265 cn	1/05/12	1/05/12	25/05/12		2000000	2000000	2000000	
Bill of materials	IDA PACIFIC	227 cn	16/01/12	16/01/12	30/01/12		414000	414000	414000	
Purchase Orders	IDA PACIFIC	204 fn	10/08/11	11/08/11	11/08/11		600000	600000	600000	
Order options	IDA PACIFIC	204 fn	10/08/11	11/08/11	11/08/11		50000	50000	50000	
Dispensing	IDA PACIFIC	204 fn	10/08/11	11/08/11	11/08/11		11000	11000	11000	
Reporting	IDA PACIFIC	204 fn	10/08/11	11/08/11	11/08/11		25000	25000	25000	
Log	IDA PACIFIC	164 fn	26/04/11	26/04/11	26/04/11		200000	200000	200000	
CSI CSI	IDA PACIFIC	94 fn	9/01/11	9/01/11	9/01/11		1300000	1300000	1300000	
Stores	International Dispensary Associati	74 fn	22/12/10	22/12/10	22/12/10		500000	500000	500000	
	South Austral PTY Ltd.	33 m	26/11/10	26/11/10	26/11/10	15/12/14	88000	88000	520000	
		32 m	25/11/10	25/11/10	25/11/10	15/12/10	200000	200000	528000	
		30 m	25/11/10	23/11/10	15/12/10	15/12/10	2268000	2268000	2268000	
	JAPANESE GOVERNMENT	23 m	25/11/10	23/12/10	25/11/10	1/04/11	3308000	3308000	3308000	
										_
Delete				OK 8	Provious		& Novt	Canco		OK
Delete				UK	rievious		anext	Cance		UK

- The **Show** drop down list beside allows filtering the display of Purchase Orders according to their status All, Suggested, etc. -
- If you double-click a row the Purchase order will be opened in a new window.

# **Order options tab**

00	Item details
General Misc	Item name AMOXYCILLIN 250MG TAB/CAP
Usage	Ordering
Stock Ledger	Never order this item
Quotes	Hold: do not receive
Backorders	Expiry date required on receive 🗹
Notes	
Reconcile	
Bill of materials	
Purchase Orders	
Order options	
Dispensing	
Reporting	
Log	
CST	
Stores	

**Never order this item:** If you have items that are "one-offs" or have been discontinued, use this check box to stop them appearing in orders.

**Hold: do not receive:** If this check-box is checked, you can not receive this item **into the store you are currently logged into**. This can be useful if you have changed to using a different item, and you do not want people to accidentally use the redundant item.

**Expiry date required on receive:** When this is checked, you will be unable to receive this item unless an expiry date is entered for it. Therefore it is best to check this box for items that will always have an expiry date such as oral medicines and to leave it unchecked for items that will never have an expiry date such as surgical instruments.

• You will be warned if you try to add or edit an item on a goods receipt or a supplier invoice that has no expiry date entered. Also, you will not be able to finalise a goods receipt that contains items which have no expiry date entered.

# **Dispensing tab**

00	Item details.	
General Misc Usage Stock	Default Directions	Picture Store: General +
Ledger Quotes Backorders Notes Reconcile Bill of materials Purchase Orders Order options Dispensing	Add Delete  Priority Directi	
Reporting Log CST Stores	Medication Purpose It's for infection	Patient instructions Make sure you take the whole course
	Warn if user tries to issue more than: 0 Print out the units for this item on labels: This option has been di item units' in the mSupp	sabled as you have choosen to 'Always print bly preferences.
Delete	0	C & Previous OK & Next Cancel OK

#### **Default directions**

A feature of mSupply® which can reduce the time taken to dispense a prescription is its use of abbreviated patient directions, which allows the entry of a short sequence of characters that expand to meaningful text. This is where you can set an item's default directions which will be used at the time of dispensing. When there is more than one entry, priority is given to the direction that is ranked at no.1 under **Priority**, and it will be automatically suggested for the item when you dispense it. Further information on the use of abbreviations will be found in the section Dispensing, Abbreviations

In cases where multiple abbreviated directions have been defined, the required one(s) will be available from a drop-down list when dispensing the item. Note that even if you set up default directions, you can override these at the time of dispensing, either with longhand text or by editing the abbreviation that has been entered.

Warning: If you choose to use this option be very careful to:

- Inform other users that default directions have been entered.
- Ensure the directions are appropriate.
- Check each prescription dispensed, and change the directions if the prescription has different directions to the default set.
- Update the default directions if you change any of the abbreviations.

**Add button:** Click this button to show a window where you can add directions. You can enter any combination of directions and text. (Abbreviations are managed by choosing **Special > Abbreviations**)

**Delete button:** Click a line, then click this button to delete directions you no longer need, or if you have made an error.

#### **Picture, Instructions and Purpose**

These fields provide default information to be used with the Patient medication records system.

**Item Picture:** You can drag and drop or past a picture into this field. Common file formats such as JPG and PNG are accepted.

When you add a picture, the size is shown to the left- we suggest pictures are less than 200KB each.

To clear a picture, click on the field and paste it.

**Purpose:** Enter the purpose of the medication here. This will be available to add to patient medication records

**Instructions:** Enter the medication instructions here. For example, you might want to explain about sensitivity to sunlight with long term use, or that certain foods should be avoided. This will be available to add to patient medication records. Note this is separate to the medication warnings system, which will print on dispensing labels.

#### **Other fields**

**Warn if user tries to issue more than field:** You can enter a number here and have the user warned if they try to dispense more than this quantity.

# **Reporting tab**

neral ic	Item name Chlorpheniramine 4mg tab
age ck lger otes tkorders tes concile of materials rchase Orders der options pensing	Reporting         ATC Category         DDD value         DDD factor         0         ABC category

**ATC Category:** This field is intended for the ATC code. The use of ATC codes and DDD values is discussed in detail here.

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

**DDD value:** The DDD value is the defined daily dose of the item. For example, doxycycline's DDD value is 100mg., while that of Amoxycillin is 1g. DDDs are a means of quantifying the issue of medicines by doses rather than by the raw number of units dispensed.

**DDD factor:** Defined Daily Dose factor- this is the number of units of the item that make up the DDD value. In the case of amoxycillin 250mg capsules the DDD factor is 4, while amoxycillin 500mg capsules have a factor of 2. For Doxycycline 100mg tablets the DDD factor is 1

**ABC category:** This option allows you to mark items that are commonly used and then report on only those items. For Reports using this category, see Items and Stock reports

# Log tab

mSupply® maintains a record of any changes to an item's details - name, code or units. The log window displays a list of such changes, under the headings:

- Date
- Time
- User and Event
- Event Type

# **Requisitions tab**

Selecting Requisitions shows the stocktakes featuring this item,

- Choose a date range from the drop-down list to show custom stocktakes within that range.
- Double-click a row to view the customer stocktake in question.



# **Stores tab**



Only users who have Admin privileges may access this feature. See section 25.15. Managing users

Selecting this item shows the stores where this item is visible, and allows these stores to be set to **Active** using the checkbox.

isc	item name Prochlorpera	rine 5mg tab		Store: General	٣
sage	Store	Active	*		
daer	General	3			
iger	Dispensary	3			
korder					
ler					
oncile					
of materials					
or materials					
ter options			1000		
perising					
poning					
145					
163					
			Ŧ		
			and the second se		

If the Active checkbox is unchecked, the item will not be visible when logged in to that store

Note that

- 1. you can only change the visibility of an item for the store you're logged in to.
- 2. you can not make an item invisible in a store if it has stock on hand in that store.

#### Seeing an invisible item

Once an item has been made invisible it will no longer show up in your items list when performing a normal find items task. To include invisible items when finding items, untick the *Exclude hidden items* box:

•	Find Item		
ltem name	▼ starts with	-	
and	▼ category is	Don't Care	
and	<ul> <li>VEN category is</li> </ul>	Don't Care	-
and	<ul> <li>department is</li> </ul>	Don't care	-
Randomly [ V Exclude hidden	0 items from retur items	ned list.	
Complex Find		Cancel Fi	ind

The items list will now display any invisible items and you will be able to able to make them visible again in the store tab.

If your mSupply system is a Primary - Satellite synced system, you can only change visibility of items on the Primary server.

Previous: 4. Items | | Next: 4.02. Adding a new item

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Permanent link: https://docs.msupply.org.nz/items:item\_basics?rev=1578904882



Last update: 2020/01/13 08:41