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 4.02. Adding a new item.

Item menu

Item	Supplier	Customer	Report	Special	Help
	Show items New item				Ctrl+I
	Show repac New repack				
	Show builds New build				Ctrl+B
	Ad Hoc iten Ad Hoc Iten				
	Inventory ad	tory adjustm djust- add ste djust- reduce	ock		
	Merge two i	tems		Ctrl	+Shift+M
	Show depar Manage iter				
	Manage dru	ig interaction	n groups.		
	Show units.				
	Show accou	ints			
	Show item of	ategories			
	Show locati Show locati				
	Merge two l				
	Show item r Show Stock Show items				

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 items						
Item name	ᅌ 🛛 starts with 🔹					
and	Category 1 ᅌ is					
and	VEN category is	Don't Care				
and	 Department is 	Don't Care				
and	ᅌ is on Master List	Don't Care				
Randon	Randomly select 0 items from returned list.					
Z Exclude hidden items						
Complex Find	cel 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 section 13.14. Custom reports.

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

Item list ... ••• 1 ÷ 1 0 1.1 Set values Order by Duplicate Customise 205/1966 New item Report Find Print Modify Item name Default pack Item Code Stock on hand Flags PAARO DORAAL004 Albendazole, 400mg, tab 0 DORAAI 006 Aluminium Hydrox...Hydr.), 500mg, tab 1 n DORAAM008 Amlodipine, 10mg, tab 1 0 DORAAM010 Amlodipine, 5mg, tab 1 0 DORAAM012 Amoxicillin + Flucl ... n, 250/250mg, cap 0 DORAAM014 Amoxicillin Syrup....mg/5ml, 60ml, bot 1 0 DORAAM016 Amoxicillin, 250mg, tab/cap 0 1 DORAAM018 Amoxicillin, 500mg, tab/cap 0 1 DORAAM020 Amoxicillin/Clavul....g/5ml, 100ml, bot 0 1 DORAAM022 Amoxicillin/Clavulanic acid, 625mg, tab 0 1 DINIAM002 Ampicillin, inj, 500mg, vial 1 0 SMSUAP002 Apron, plastic, disposible, pce 1 0 DORAAR028 0 Artemether / Lume...Omg, 12 tabs, strip 1 DORAAR026 Artemether / Lume...Omg, 18 tabs, strip 1 0 DORAAR024 Artemether / Lume...Omg, 24 tabs, strip 0 1 DORAAR030 Artemether / Lume ... 20mg, 6 tabs, strip 1 0 DINJAR004 Artemether, inj, 80mg/ml, 1ml, amp 1 0 DINIAR006 Artesunate, ini, 60mg, vial 1 0 DORAAS032 Ascorbic acid (Vitamin C), 100mg, tab 0 DEXTAS002 Aseptol, 500ml, bot 0 1 DINJAT008 Atropine sulphate, ... 1mg/ml, 1ml, amp 1 0

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

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.

🖢 Set val	ues ×			
Set flags for highlighted items				
Set flag to				
Append to existing flags				
O Replace existing flags				
Set forecasting options for highlighted items				
When calculating future consumption:				
Do not change- use current setting				
O Use historical Average Monthly Consumption (AMC)				
O Use historical AMC increased by a factor of: 0 %				
Use a fixed, estimated AMC of:	0 items/month			
O Use projection:	Α 👻			
	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.

 Confirm		
Are you sure you want to duplicate this item : 4 Hooks + 8m Nylon rope for Mosquito net		
Duplicate		

Note that for recording and audit purposes a Log event is created when an item is duplicated. For more information on log events see section 25.19. The system 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	Item details
General	Item name Albendazole 400mg, tabs, chewa	able Store: General o
Storage Misc	ltem code alb400tc	Pricing
Usage	General	Default margin 0
Stock Ledger Quotes Backorders Notes Reconcile Bill of materials Purchase Orders Order options	Units Tablet C Department None C Category C Category 2 None C Category 3 None C Interaction group None C Item flag	Default sell price of preferred packsize 0.00 Price editable when issuing Full description
Dispensing Reporting Log Requisitions Stores	Universal code Solution Ing Doses Is a vaccine? Hold: do not issue	Product specifications
Barcodes Custom data Master lists Interactions	Issue in builds only Allow pack to one conversion Convert pack to 1 when receiving Include in DHIS2 data push	Stock category Custom fields Normal stock user_field_1 Critical stock user_field_2 On essential drug list user_field_3
		VEN Category user_field_5 0.00 Not assigned user_field_6 Vital user_field_4 Essential user_field_7 Not essential
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.

- 4.01.01. Items General tab
- 4.01.02. Items Storage tab
- 4.01.03. Items Misc(ellaneous) tab
- 4.01.04. Items Usage tab
- 4.01.05. Items Stock tab
- 4.01.06. Items Ledger tab
- 4.01.07. Items Quotes tab
- 4.01.08. Items Backorders tab
- 4.01.09. Items Notes tab
- 4.01.10. Items Reconcile tab
- 4.01.11. Items Bill of materials tab
- 4.01.12. Items Purchase orders tab
- 4.01.13. Items Order options tab
- 4.01.14. Items Dispensing tab

- 4.01.16. Items Log tab
- 4.01.17. Items Requisitions tab
- 4.01.18. Items Stores tab
- 4.01.19. Items Barcodes tab
- 4.01.20. Items Custom data tab
- 4.01.21. Items Master lists tab
- 4.01.22. Items Interactions tab

Previous: 4. Items | | Next: 4.01.01. Items - General tab

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

Permanent link: https://docs.msupply.org.nz/items:item_basics?rev=1619611537

Last update: 2021/04/28 12:05

