

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



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:



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

Items list view

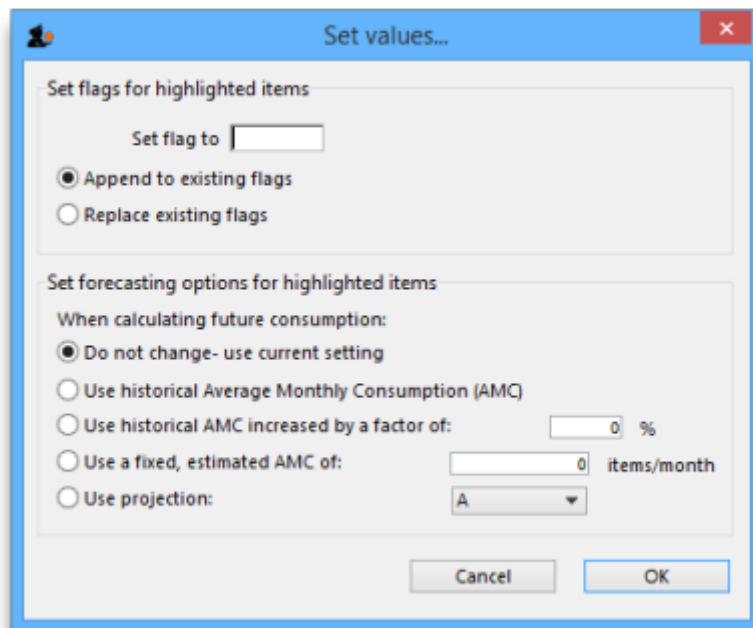
New item

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

Set values

Click the **Set values** button to do either (or both) of the following for **all** the highlighted items:

- Set the flag
- Set forecasting options



You can highlight multiple items at the same time by holding down the control key (command key on Mac) and click on the lines you wish to flag. They will become highlighted.



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.



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

Order by

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

Print

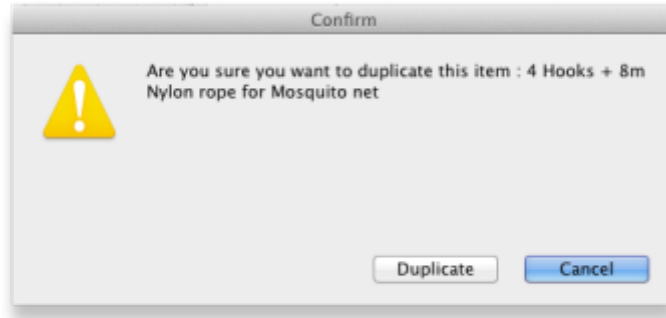
Click the **Print** button to print the items currently displayed in a list.

Modify

Click the **Modify** 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 the Duplicate 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 section [25.19. The system log](#).

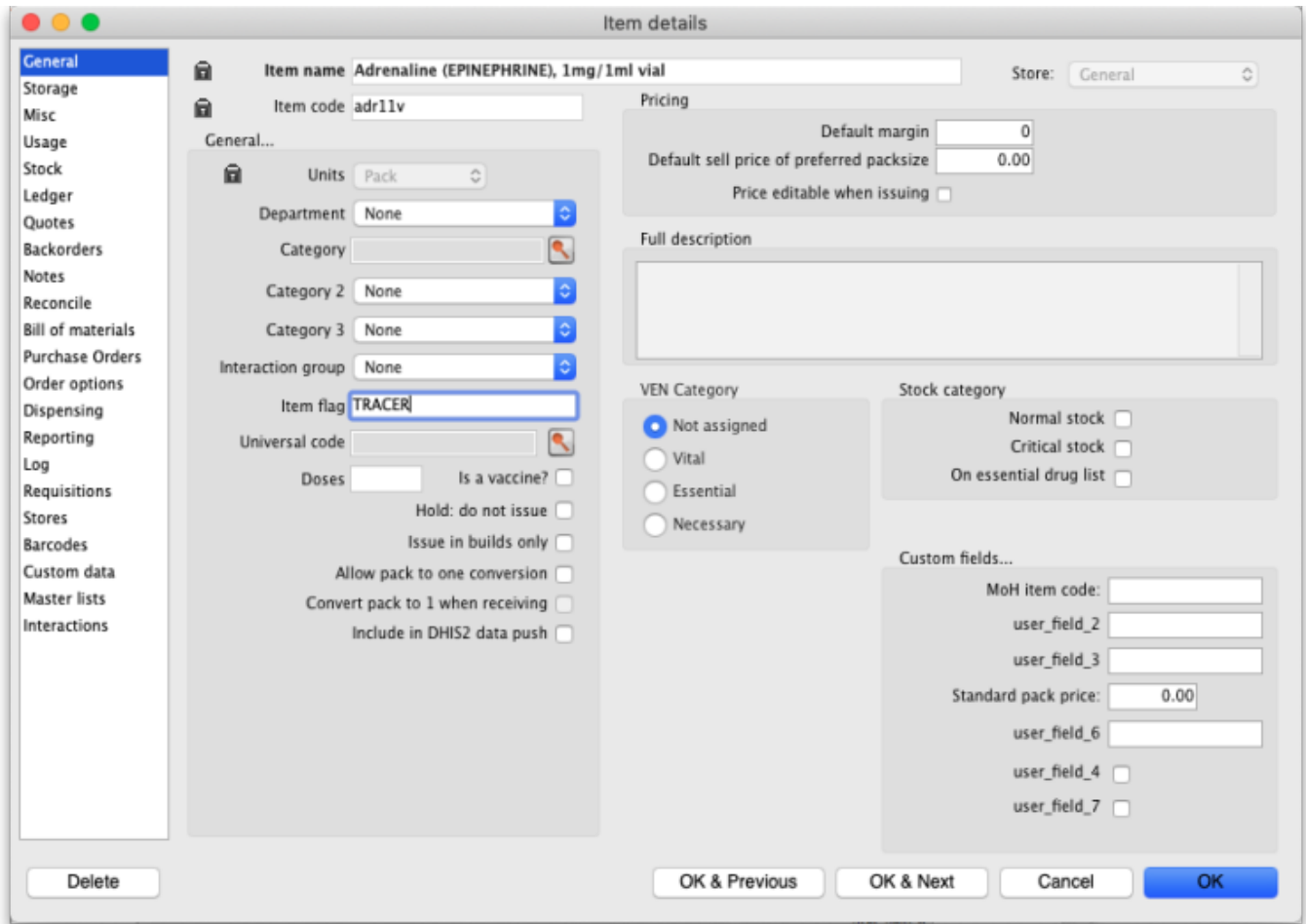
Customise

Clicking the **Customise** 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](#).

Merge


Click on the **Merge** button to merge two highlighted items.

Item details window




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](#)
- [4.01.15. Items - Reporting 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](#)
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- [4.01.21. Items - Master lists tab](#)
- [4.01.22. Items - Interactions tab](#)

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