## 5.01. Names: using, adding and editing

## About names

In mSupply a "name" is one of these:

- customer: a recipient of your goods
- supplier: someone who sends your store goods
- manufacturer: someone who makes the goods that you receive, store and distribute
- donor: an entity that donates goods to you (you can track donated stock)
- patient: someone you dispense goods to
- others: you'll find other types e.g. benchmarks mentioned through out the documentation

A name can also be more than one (or all!) of these at the same time.

# Adding a customer, supplier, manufacturer, donor or benchmark

## Adding a new customer

In a multi-store system, you will quite likely not want the new customer to be visible to every store. By default, mSupply will make a new customer visible only to the store that you are logged in to when you create the customer. This store will be made the 'Supplying store' - which is more relevant if the customer becomes a store in its own right. Make sure that you are logged in to the supply store before proceeding.

To add a new customer:

- Log in to the supplying store
- Choose *Customer* > *new customer* from the menu.
- The form shown below will come up.

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• The customer checkbox will be checked and disabled (from editing).

Name		Contact				General 0	
Ga Code Code Charge to Code Charge to Charge t		web Pho	email web site Phone Fax			Currency USD	
HSH code	5	Status	Status Price Ca			Supplying store General	
HSH name			Hold	A 🖯	Printi	00	
						Print invoices alphabetically	
Category	Other						
Customer V	Category 1 None		Category 5	5 None	8	Custom 1	
Supplier	Category 2 None		Category 6		8	Custom 2	
Manufacturer	Category 3 None		State/Region		8	Custom 3	
Benchmark	Category 4 None		Flag		_	Comment	
Main/Billing Address		Po	ostal address		5	hipping address	
Address 1		1		_	[		
Address 2		] [					
Address 3		] [			[		
Address 4		] [			[		
Address 5		] [			[		
Post code		] [			[		
Country							

#### Adding a new supplier

- To add a new supplier, choose Supplier > New supplier from the menu (makes sense really!)
- The window will look the same as for adding a customer, except the supplier checkbox will be checked and disabled (from editing).

#### Adding a new manufacturer

- To add a new manufacturer, choose *Supplier > New manufacturer* from the menu.
- The window will look the same as for adding a customer, except the manufacturer checkbox will be checked and disabled (from editing).

## Adding a new donor or benchmark

- Select *Customer* > *New customer* or *Supplier* > *New supplier* from the menu.
- The same window for adding a new customer or supplier will open and you should check the *Donor* or *Benchmark* checkbox in the Category section.

#### Fields in the names entry window

#### Name Code

The unique code to identify this customer, supplier or manufacturer.

#### Charge to

mSupply is made to work in tandem with an accounting program (although it will also function just fine by itself). The "Charge to" code is what is exported with each invoice. Generally you should make the charge code and name code the same (If you want, there is an option in the Preferences > Misc tab to make sure this is the case). For example:

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• If you have 3 hospitals you supply, but you send the bills to one centre for payment, you may want to enter each hospital with its own name code, and all of them with the same charge code. In your accounting program you would just enter one debtor (customer) with a code the same as the charge code. eg.

Customer	Name code	Charge code
Fred H Hosp	fhhosp	bluehos
Mary P Hosp	mphosp	bluehos
Sam Q Hosp	sqhosp	bluehos

- In your accounting program you would enter "Blue Hospitals Assoc" with the code "bluehos"
- For a supplier, if you have entered a default currency and margin these will be entered, but you can override them. Every supplier should have its currency entered (The currency it uses for your invoices). If the currency isn't yet in your system, close the name entry window and choose Currencies from the Special menu to add it.
- if you do not wish to use different name codes and charge codes, check the "supplier name code and charge must match" and "customer name code and charge must match" check boxes in the mSupply Preferences. If you do this, the charge code will automatically be identified with the name code.
- spaces are not allowed in name codes and charge codes

Either the "customer" or "supplier" check box will be checked as appropriate, depending on whether you have chosen "new supplier" or "new customer" from the menus to produce this window. However, you can still alter things here without upsetting mSupply.

#### Name

The customer/supplier name. (Remember you can use the *Tab* key to move from field to field)

If there are non-printable characters before or after the name, code or charge code they will be removed. Any nonprintable characters in the name, code or charge code will be replaced with an underscore ().

#### HSH code & HSH name

These are used when using the Health Supply Hub (replacement for the Remote tender module - see the Health Supply Hub page for details) to link suppliers or manmufacturers with their record on the Health Supply Hub server and maintained by The mSupply Foundation. If your system does not use the Health Supply Hub, then you can ignore these fields.

To link a supplier or manufacturer to one already entered in the Health Supply Hub:

- 1. set your Health Supply Hub preferences (16.01. General preferences)
- 2. click on the padlock icon next to the **HSH code field** to unlock it and enable the 🖾 button.
- 3. click on the 뛀 button.

mSupply will then search for a supplier or manufacturer (depending on whether the name is a supplier or manufacturer in mSupply) in the Health Supply Hub with a name having the same first letter. A window like this opens:

Quick search S					
Code	Supplier Name				

If the correct supplier or manufacturer is not shown in the list then clear the contents of the **Quick search** field. All suppliers or manufacturers registered on the Health Supply Hub are then displayed. You can refine the search by typing something in the **Quick search** field and only suppliers/manufacturers with names that begin with what you typed will be displayed.

When you see the supplier/manufacturer name that you wish to connect to the supplier in mSupply, double-click on it to select it; the Health Supply Hub code of the supplier/manufacturer will be put in the **HSH code** field and the supplier/manufacturer's Health Supply Hub name will be shown in the **HSH name** field.

It the search is unsuccessful or there is a problem connecting to the Health Supply Hub, you will be shown an appropriate message.

**Note:** if the name you are trying to link to the HSH is a customer then you shown a message telling you that linking it to a supplier or manufacturer in the Health Supply Hub is not possible.

#### Туре

In the main entry screen, there are 4 check boxes to mark each entry as a customer, a supplier, a manufacturer and an additional *Benchmark* category. This last category is a feature of the Tender Management module, and is fully explained in that section, under Using Benchmark prices

#### Status - Hold checkbox

If this is checked this name can not be used for receiving or issuing goods.

#### Donor checkbox

This is applicable to suppliers only. There are a few situations in which this box should be checked:

- 1. If this supplier/organisation provides goods free of charge (either in whole or in part).
- 2. If this supplier/organisation provides funding (either in whole or in part) for purchasing.

#### **Price Category**

Selection of any of the categories will fix a certain price margin for that Supplier or Customer.The price category value is entered in *File >Preferences > Prices*. When goods are being issued to this customer, the selling price is increased/decreased by the percentage specified in the Preferences for this price category.

• Eg: Consider customer XYZ, who is in category B, and in the preferences category B is assigned a value of 50. If an item is issued to customer XYZ with a normal selling price of \$10, the selling price on this invoice will be \$15.

#### Address and contact details

These should be completed with relevant details

• For customers, you can enter separate delivery and billing addresses as necessary.

#### **Other section**

#### Categories

These category fields are used for reporting and are available for you to make whatever entries are appropriate in your situation. For example, you might wish to subdivide your Hospital category by number of beds, or your Clinics by the number of patients seen daily, etc. Or you may wish to identify your customers by their geographical location (region, district, state etc.) or by location type - urban, city centre, rural, remote, etc. The choice is yours - the main point to remember is that these fields are searchable, enabling you to produce reports relating to very specific criteria.

- There are 6 category fields available for selecting as required.
- Each category has its own drop down list containing the categories which have been defined using the menu item **Supplier > Show categories...** or **Customer > Show categories...** (see Name Categories for more details).
- The labels of these 6 categories can also be changed in the preferences (see General preferences, Names tab for details).

#### **Custom fields**

Custom fields are similar to Category fields, the main difference being that these fields are not validated using a drop-down list, and so can't be reliably used for categorisation.

#### Analysis

You can use this field to group together certain types of customers or suppliers. You can filter the report by selecting the group in the *Analysis* field.

#### Postal address

Here you can enter a postal address if it is different to the physical address of the supplier.

#### Supplying store

As of mSupply versions (Mobile and Desktop) released since 2019, the concept of a **Supplying store** is less relevant than it was. The feature is still active, can be utilised with custom code, and is the default store for internal orders are if this customer becomes a stoer in its own right.

## Extra information for customers only

**Shipping address:** If the name is a customer, shipping address fields will be shown.

## Extra information for suppliers only

**Currency:** Enter the currency code of the currency this supplier uses for invoicing you.

Margin: Enter the percentage margin to apply to items received from this supplier.

**Freight factor:** Enter the amount to add to quotations from this supplier to adjust quoted prices for freight. For example: a physical check on invoices from IDA reveals that freight to Nepal generally amounts to about 15% of the net value of the invoice. Therefore we would enter "1.15" in this field for IDA. Note that if suppliers quote you "CIF" prices, then you should enter "0" here.

## About manufacturers

When you are receiving goods, you can optionally specify the manufacturer of each item. Manufacturers can be chosen from a list that is made up of names which have the *Manufacturer* checkbox checked.

For the manufacturer field to be shown, the option must be turned on:

- Special > Show stores > [choose your store and double-click] > Preferences tab
- Check the **Able to specify manufacturer when receiving, ordering or quoting for items** checkbox

## Editing a customer, supplier or manufacturer

## Finding a name

Before you can edit a name, you have to find it and display its details! For this example we will edit a customer. Editing a supplier is just the same, except that you start by choosing *Show supplier* from the *Supplier* menu.

Choose *Customer* > *Show Customer*. You are presented with a window to enter as much of the Customer name or code as you know:

Show customers
Normal O Fuzzy Name filter
Name ᅌ contains ᅌ
and Oistrict Ois
and O Customer group is Don't Care
Search
All names     Manufacturers       Selection     Donors       Customers     Zexclude patients
Suppliers
Exclude hidden names     Complex Find     Cancel     Find

• The **slide bar** at the top of the window may be set to Normal, at the left, or at intermediate points towards the Fuzzy end (right); this determines the accuracy of matching your entry; when set to Normal, the search will only match exactly what has been entered; when set at Fuzzy the search will list entries which are approximate matches to what has been entered. The accuracy with which the list matches the entry is determined by the position of the slider.

- If you leave the Name/Code text field empty, clicking the Find button will produce a full list of all customers.
- You can enter values for the other filters too (or them only!) if you want to refine your search.
- Note that the window has a series of radio buttons to select the target of your search All names, Customers, Suppliers, Manufacturers, etc. So even if you start this search from, say,
   Customer > Show Customers..., by selecting the Suppliers radio button, you can search in suppliers rather than customers.
- The **Exclude patients** checkbox is checked by default and means that any patients you have in your datafile will not be included in the search. If you uncheck it, any patients in the current store will be included in the search.
- The **Exclude hidden names** checkbox is checked by default and means that any names hidden in your store (but probably visible in other stores) will not be included in the search. If you uncheck this box then the search will include all names in all stores, and their visibility will be ignored.

If the search finds only one name that matches the filter criteria you entered, its details window will be displayed. If more than one name matches then you are shown a list of them all

				Names				
New Moo	dify Set flags	Print Find	Order by Merge	Labels Repo	rt Custom data	Customise		21/60
Code	Charge to	Name	Address 1	Address 2	Currency	Category 1	Flags	Custom Data
ALD	MCG	Alders Store	12 Excellence Lane	Russia	USD			
AMN	AMN	Amnesty Hospital	100 Christmas Rd	New Zealand	USD			{"Custom Code":{"data":"ABC"},"Insured":{"data":1}}
Baltimor	Baltimor	Baltimor	Cristo Rei	Dili DHS	USD	DILI		
BIK	BIK	Bike Hospital	111 Cycle Lane	New Zealand	USD			{"Custom Code":{"data":"ABC"},"Insured":{"data":1}}
CAC	CAC	Cactus Hospital	87 Books Road	Brazil	USD			
camelrefhosp	camelrefhosp	Camelbak Refeospital (Store)	Australia		AUD	Baure)		{"Custom Code":{"data":"ABC"},"Insured":{"data":1}}
DIL-020-N	DIL-020-N	National Health Laboratories	East Dili, CRISTO REI	DILI	USD	DILI		
Elm	Elm	Elm Pharma	897 Diagon Ally	Greece	USD			

## Buttons in the names list window

#### New

This button allows you to enter the details of a new customer

#### Modify

This button opens a window displaying the details of the highlighted customer, allowing their details to be modified.

#### Set Flags

This button allows you to mark certain names with a flag.

• First, highlight the names you wish to flag by holding down the control key (command on Mac) and clicking the names in the list you wish to use. Then click the Flags button to show a window where you can enter the flag you wish to add, and decide whether to replace any existing flags or append the new flag to the old one.

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#### Print

Clicking this button will print a list similar to the one displayed on screen.

#### Find

This button shows the same find window as choosing the menu item did so you can find a different group of names.

#### Order by

This button allows you to sort the displayed list by the criteria you choose. The Labels and Print buttons will use the order that is displayed. By default, names are displayed alphabetically based on the name column.

#### Merge

This button allows two customers to be merged into one; highlight the two entries click on the Merge button to display this window:

					Names lis	it				
New	6	odify Set flags	Print		Order by	Merge	Labels	Report	Customise	11/22
					order by					_
Code	Charge albert	Name Albert Young memoria	hereitel	Address 1		Address 2	Category 1	Flags	Phone	
ballh	ballh	Ballance Mem Hosp	nospical	Lazimpat	Katha	nandu			977-1-529933	
claus	claus	Clauss Memorial health	cantra	cazimpat	Kathi	nanou			977-1-529955	
duwa	duwa	Duwa regional hospital			_					
		Duwa Public Hospital								
garg	garg	Gargan zonal hospital								
Med	Med O	Gargan zonai nospital			Mar	ge names				-
pharam	phai	••			men	ge names				
pleb	pleb									
royal	roya	-								
ventura	vent	💽 Кеер 🛛 🤇	Merge			🔵 Ke	ер 🖸	Merge		
		Code Charge to Name Address 1 Address 2 no. of trans last trans	2				Code Charge to Name Address 1 Address 2 no. of trans last trans	Duwa Duwa Duwa 0 00/0	ihos i Public Hospital	
								Ca	ancel C	ж

Choose the record you wish to keep and click on *OK* ; the data from the deleted record is then merged with the data of the record being kept. If you change your mind, click on the *Cancel* button, and the merger will be cancelled.

#### Labels

Clicking this button allows you to print address labels for the names in the list. The label editor is displayed.

#### Report

Click on this icon to open the Quick Report editor window. Use of the Quick Report is discussed elsewhere in the guide. See Custom Reporting Tutorial

#### Custom data

This allows you to bulk edit the Custom data fields associated with the displayed names. An editor window like this will be displayed:

		Update	Apply to
Custom Code	ABC		Selected items
Quantity		2	<ul> <li>All items in list</li> </ul>
Insured			
Date established	4/04/20		
Programme	P1	0	
Fields with default (uncha	nged) values will be updated	≎ Car	Save Changes

Only fields with their checkbox selected in the "Update" column will be modified. Note that you have the option to apply the changes to **all** names currently displayed in the list or only ones that you have **selected** before opening the editor.

Click "Save changes" to apply. After confirmation and processing, you will see your changes reflected immediately in the *Custom Data* column of the names list. It is recommended that you have the *Custom Data* column displayed (see **Customise** below) before bulk editing custom data so you can clearly see which names have been changed.

If you want to remove certain fields entirely from the names, select the field(s)' "Update" checkbox, then switch the selector at the bottom so it says "Fields with default (unchanged) values with be *removed*" (instead of "*updated*"). Any fields you haven't changed from their default values (i.e. blank for text, 0 for numbers, etc.) will be removed upon saving. You can completely remove *all* custom

data for selected/displayed names by selecting all "Update" checkboxes, leaving all values default, and choosing the "removed" option.

Make sure you know what you're doing when bulk editing as you can easily over-write a lot of data if you're not careful.

#### Customise

Allows you to choose which columns to display using this window (Note: this only affects the columns you see in this list, it won't affect what other users see):

Available	Chosen
Category 2	Code
Category 3	Charge to
Comment	Name
Country	Address 1
Custom 1	Address 2
Custom 2	Currency
Custom 3	Category 1
Customer	Flags
Customer group	>> Custom Data
Date of birth	<<
Email	
Fax	
Female	
Freight	
Hold	
Manufacturer	
Margin	
Master ID	
Master name	
Phone	
Postal address 1	
Postal address 2	
Price Category	

Columns on the left are available. Columns on the right are the ones in use in your names list. Click a row in either column then click the move left or right button to transfer it to the other column. Click **OK** when you're done, or **Cancel** if you want to stick with what you've got. Your choice of columns to display will be remembered for the next time you display a list of names (customers, suppliers etc.).

#### **OK Button**

Closes the window

## Editing or viewing a name

To edit/view a particular name, if you are looking at a list of names double-click the name you want to edit on the list (no need to do this if you are already looking at the name's details page because only 1 name was returned from your search).

You will be shown the name's detail window which has a sidebar showing several tabs, *General, Invoices, Backorders, Quotes* etc. and opens at the *General* tab:

• • •	Edit	customer/supplier			
Ceneral Invoices Backorders Quotes Notes Contacts Group	New customer1 Name Code new1 Charge to new1 Name New customer1	Contact email web site Phone Fax	Store: General O		
Purchase orders Item lists Requisitions Store Photo	Master ID 0 S	Status Price Category Hold A	Customer details Supplying store Ceneral  Printing Print invoices alphabetically		
	Category Other Customer  Supplier Category 2 none Manufacturer Benchmark Category 3 none Category 3 none	Category 4 none Category 5 none Category 6 none Flag	Custom 2		
	Main/Billing Address Address 1 Address 2 Address 3 Address 4 Address 5 Post code Country	Postal address	Shipping address		
Delete name	]	OK & N	ext Cancel OK		

#### **Deleting names**

Click on the **Delete** button in the bottom left hand corner to delete the name.

If a name has transactions entered against it, you will not be able to uncheck the relevant check box in the *Category* section, and you will not be able to delete it. For example, if a supplier has invoices entered against it, you will not be able to uncheck the **Supplier** check box, and you will not be able to delete the supplier.

## Putting a name on Hold

If you wish to prevent future transactions with a name, change it's status to on 'Hold'.

## **Invoices tab**

Here you can view the invoices for a customer or supplier.

General	AUPEUS	DERIC	CIR-D PUBLIC								
Invoices									Stor	e: District Sanitai	ire 0
Backorders	1										_
Quotes		<b>-</b>			Filter	All	0		Ov	erpayments	0.00
Notes		eing							Total o	outstanding	848,324.60
Contacts	~	penng									
Group	Ty	. St	Entry dt	Confirm dt	inv num	Their ref	Comment	Total	Currency	Total (local c	Outstanding
Purchase Orders	ci	sg	18/03/2020		7		Web order:	0.00	XOF	0	0.00
ltem List	ci	fn	06/06/2019	06/06/2019	20		Facture ddu client	0.00	XOF	176725	0.00
Requisitions	ci	fn	06/06/2019	06/06/2019	23		Facture ddu client	0.00	XOF	0	0.00
Store	ci	fn	06/06/2019	06/06/2019	24		Facture ddu client	0.00	XOF	0	0.00
Photo	ci	fn	17/06/2019	17/06/2019	125		Facture ddu client	0.00	XOF	0	0.00
Custom data	ci	fn	26/06/2019	26/06/2019	175		Facture ddu client	0.00	XOF	0	0.00
Log	ci	fn	12/07/2019	12/07/2019	239		Facture ddu client	0.00	XOF	0	0.00
Supplier Hub	ci	fn	12/07/2019	12/07/2019	240		Facture ddu client	0.00	XOF	134680	0.00
	ci	fn	15/07/2019	15/07/2019	244		ALLOCAEMENT)	167,180.00	XOF	167180	167,180.00
	ci	fn	15/07/2019	15/07/2019	245		PNSME	6,625.00	XOF	6625	6,625.00
	ci	fn	15/07/2019	15/07/2019	246		PNSME (K+ ZINC)	0.00	XOF	0	0.00
	ci	fn	15/07/2019	15/07/2019	247		PNLS_TRC	0.00	XOF	0	0.00
	ci	fn	22/07/2019	22/07/2019	304		GTC	30,000.00	XOF	30000	30,000.00
	ci	fn	24/07/2019	24/07/2019	344		MEDICAINTRANTS	0.00	XOF	0	0.00
	ci	fn	13/08/2019	13/08/2019	431		GTC	53,400.00	XOF	53400	53,400.00
	ci	fn	16/08/2019	16/08/2019	462		GTC	0.00	XOF	90510	0.00
	ci	fn	16/08/2019	16/08/2019	465		DOTATION ARV	0.00	XOF	0	0.00
	ci	fn	19/08/2019	19/08/2019	469		COMPLETION ARV	0.00	XOF	0	0.00
	ci	fn	19/08/2019	20/08/2019	468			0.00	XOF	0	0.00
	ci	fn	26/08/2019	26/08/2019	509		MEDICANTS PNLP	0.00	XOF	0	0.00
	ci	fn	10/09/2019	10/09/2019	550		MEDICANTS_PNLP	0.00	XOF	0	0.00
	ci	fn	10/09/2019	10/09/2019	551		MEDICATS_PNSME	0.00	XOF	0	0.00
	ci	fn	09/09/2019	11/09/2019	542		MEDICAINTRANTS	296.199.60	XOF	296199.6	296.199.60

Note that the *Total outstanding* field shows a customer's payment balance and is only shown if the customer receipts module is turned on (see 11.02. Receiving payments from customers).

You are able to edit an invoice directly from this window by double-clicking the one you wish to edit. A new window will open with the invoice details displayed.

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🗶 Ci	usto	mer invoice	:							×
1	Nam	e		Confirm date	17/12/08				Colour :	Black
The	eir re	f 102824	C504	Period	01/01/08 -	31/12/08	-		Invoice : 3,040	
		t tuesday o	order 👢	Category	None		-	En	try date : 16/12/08	
Com	men	it [tuesday (	brder 💌	category					ceive ID : 0	
								Goods re		
	<u>.</u>		61.	15	1	R.			Status : cn	
N	lew l	line Del	ete line(s)	Backo	rders I	History		Ent	tered by: Pharmad	y assistant
Gen	eral	Summary	by Item Summary by Batch Transport de	tails					Store : General	
	L	Location	Item Name	Quan	Pack Size	Batch	Exp date	Sell Price	Price exten	*
	1	TAB	Condom male unit	5	144	6J107	30/09/11	0.00		0.00
E.	2	NON	Gauze swab 8ply 10cmx10cm	3	1			4.58		13.76
2	3	NON	Gauze swab 8ply 5cmx5cm	5	1			1.72		8.60
	4	NON	Examination Gloves large	1	100			0.00		0.00
	5	AAA	Amoxycillin 500mg cap	1000	1			0.00		0.00
	6	VAC	Hep B 10 dose vial	20	1	WVA06026	26/11/09	0.00		0.00
	7	LTE	Chlorhexidine 1% solution (mL)	1	5000	80356	30/03/12	0.00		0.00
										Ŧ
			Other charges Item:						Amount:	0.00
		) 🛃 🛃						S	ubtotal:	22.36
									0 % tax:	0.00
									Total:	22.36
L	old nali:	ze Expo	ort batch: 0			OK & Next		Delete	ОК	] □ ♣

#### Buttons on the Invoices tab

#### **Print Range**

Click this button to print a range of invoices for a customer. You will be asked to enter the first and last invoice numbers to be printed.

#### Aging

Click this button to display a list of aging categories and the outstanding unpaid balance for each invoice in each category.

🐅 Outstanding summa	ary – 🗆 🗙
Cut off days	Outstanding totals
less than 30 days	0 ^
30 to 60 days	0
60 to 90 days	0
90 to 120 days	0
120 to 180 days	0
over 180 days	0
<	Ň
•	/
	OK

#### Dates

Choose a date range from this menu to show quickly recent invoices, or to revert to showing all invoices

## **Backorders tab**

ontacts	ew backor	🐹 🖤					
ontacts	w backor		<b></b>			All	
		der Delete backorder Copy	Print				
mails	Code	Item	Order date	Quantity	Stock	Comment	
	Lig11	Lignocaine 1% 20ml/50ml vial	22/02/11	5	10		
	Cotsyr	Cotrimoxazole 240mg/5ml susp (100mL)	22/02/11	110	13816		
/eb log-in	Erysyr	Erythromycin 125mg/5ml susp (100mL)	22/02/11	8	3729		211212101
	Flusyr	Flucloxacillin/Cloxacillin 125mg/5ml susp (1	22/02/11	10	11900		
	Mebsyr	Mebendazole 100mg/Smls syrup (30mL)	22/02/11	10	0		
tore	Parsyr	Paracetamol 120mg/5mls syrup (mL)	22/02/11	20000	578050		
2 State 1 - 1	Sal4	Salbutamol 4mg tab	22/02/11	400	50400		diam'r a barlan a ba
A	mo500	Amoxycillin 500mg cap	22/02/11	3000	723000		
	Flu500	Flucloxacillin/Cloxacillin 500mg cap	22/02/11	2000	4700		1100
	Asp3	Aspirin 300mg tab	22/02/11	1000	566700		
	Ate5	Atenolol 50mg tab	22/02/11	1000	60648		
	acrsol	Acriflavin 0.1% Solution (manuf) mL	22/02/11	1000	0		
STATISTICS IN THE	Savl	Cetrimide + Chlorhexidine (Savlon) 15%+1.5	22/02/11	1000	624072		
C	hexobs	Chlorhexidine obstetric lotion 1% (gm or m	22/02/11	1	28220		
	Lubjel	Lubricating jelly (KY) (82g)	22/02/11	10	2750		
P	erm5lot	Permethrin 5% Lotion (bottle/tube)	22/02/11	5	483250		-

• Here you can view, add and edit the backorders for a customer. mSupply allows entry of backorders against suppliers as well, but we are not sure why you would want to do this!

#### Buttons on the Backorders tab

#### New backorder

Clicking this button presents you with a window where you can add a backorder line for this customer.

<b>\$</b> •	New Backorder
Customer Item Order date Quantity Comment	Leaf Surgical supplies 23/03/2015 0
Comment	Cancel OK

- Type at least a portion of the item code or item name, then press the Tab key.
- Today's date is automatically entered. You can change the date if you like
- Enter the total quantity owing.
- Enter a comment (e.g. an expected arrival date)
- Click OK to save changes and exit the window.

#### Delete backorder

Click a backorder line to highlight it, then click this button to delete the line. You can also select several at once (using *ctrl/cmd+click* and *shift+click*) or all the backorders in the list using *ctrl/cmd+a* and delete them at once as well.

#### Сору

This command copies the backorder to the clipboard, allowing you to paste the report into an email message, word processor or spreadsheet document.

#### Print

The list of backordered items for the customer is printed.

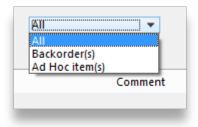
#### Viewing backorders

Double-click a backorder line to edit the line. You will be shown the backorder entry window, where

you can change any details you wish.

## Show

This drop-down list allows you to choose which backorders to display.



- Backorders are normal items that have not been supplied to customers.
- Ad Hoc items are items that customers have ordered but which you do not want to add to your stock list, rather making a special order just for that customer.

## **Quotes tab**

									Stor	e: [	Seneral	- · (ì	
💼 😫													
New Quote Delete Qu	uote	She	ow: All				•						
Item	Date	Cur	Rate	Price	Pac	Freight	S	Cost	Adj Cost	Pr	Valid Until	Comment	٠
Chloramphenicol 5% ear drops	25/02/09	NZD	0.7485	3.55	1	1.00	1	2.65	2.6571		20/03/09	NZ. Air freight	Ξ
Phenytoin 50mg/ml amp	25/02/09	NZD	0.7485	115.0	5	1.00		86.12	17.2259		20/03/09	250mg/5ml. NZ. Air freigh	
Banitidine 25mg/mL amp	25/02/09	NZD	0.7485	13.65	5	1.00	-	10.21	2.0434		20/03/09	NZ. Air freight	
Suxamethonium 100mg/2ml amp	25/02/09	NZD	0.7485	230.3	50	1.00		172.38	3.4477		20/03/09	NZ. Air freight	
Amoxycilin+Clavulanate 500mg+1	25/02/09	NZD	0.7485	66.00	100	1.00		49.40	0.4940		20/03/09	unk brand, india. Air	
Enalapril 5mg tab	25/02/09	NZD	0.7485	3.10	100	1.00	2	2.32	0.0232		20/03/09	unk brand, india. air	
Griseofulvin 500mg tab	25/02/09	NZD	0.7485	97.00	500	1.00	V	72.60	0.1452		20/03/09	unk brand, india. air	
Salbutamol 4mg tab	25/02/09	AUD	1.0000	5.96	500	1.00		5.96	0.0119		20/03/09	unk brand, india. air	
Hydrocortisone 1% cream (15g tub	25/02/09	NZD	0.7485	3.25	1	1.00	_	2.43	2.4326		20/03/09	unk brand, india. air	
Metformin 500mg tab	25/02/09	NZD	0.7485	14.45	500	1.00	2	10.81	0.0216		20/03/09	unk brand, india. air	
Blood test strips - Advantage II (50	12/03/09	NZD	0.7485	30.25	1	1.00	1	22.64	22.6421		09/04/09 Ro	CIF price - air freight	
Naloxone 400mcg/ml amp	31/03/09	NZD	0.7485	49.68	5	1.00		37.18	7.4370		30/04/09	AF,	
Phenoxymethylpenicillin (PenV) 12	31/03/09	NZD	0.7485	3.95	1	1.00	_	2.95	2.9565		30/04/09	AF	
Captopril 25mg tab	31/03/09	NZD	0.7485	25.65	500	1.00		19.22	0.0384		30/04/09	AF Fiji (Apotex)	
Motoology amide 10mg tab	21 102 100	M7D	0.7406	7 90	100	1.00		E 07	0.0597		2010/10/00	AE	
	Item Chloramphenicol 5% ear drops Phenytoin 50mg/ml amp Ranitidine 25mg/mL amp Suxamethonium 100mg/2ml amp Amoxycilin+Clavulanate 500mg+1 Enalapril 5mg tab Griseofulvin 500mg tab Sabutamol 4mg tab Hydrocottisone 1% cream (15g tub Metformin 500mg tab Blood test strips - Advantage II (50 Naloxone 400mcg/ml amp Phenoxymethylpenicilin (PerV) 12 Captopril 25mg tab	Item         Date           Chloramphenicol 5% ear drops         25/02/09           Phenytoin 50mg/ml amp         25/02/09           Ranitidine 25mg/mL amp         25/02/09           Suxamethonium 100mg/2ml amp         25/02/09           Amoxycilin+Clavulanate 500mg+1         25/02/09           Griseofulvin 500mg tab         25/02/09           Sabutamol 4mg tab         25/02/09           Hydrocortisone 1% cream (15g tub         25/02/09           Blood test strips - Advantage II (50         12/03/09           Naloxone 400mcg/ml amp         31/03/09           Phenoxymethylpenicilin (PenV) 12         31/03/09	Item         Date         Cur           Chloramphenicol 5% ear drops         25/02/09         NZD           Phenytoin 50mg/ml amp         25/02/09         NZD           Ranitidine 25mg/mL amp         25/02/09         NZD           Suxamethonium 100mg/2ml amp         25/02/09         NZD           Amoxycilin+Clavulanate 500mg+1         25/02/09         NZD           Griseofulvin 500mg tab         25/02/09         NZD           Sabutamol 4mg tab         25/02/09         NZD           Hydrocottisone 1% cream (15g tub         25/02/09         NZD           Blood test strips - Advantage II (50         12/03/09         NZD           Naloxone 400mog/ml amp         31/03/09         NZD           Phenoxymethylpericilin (Perk/) 12         31/03/09         NZD	Item         Date         Cur         Rate           Chloramphenicol 5% ear diops         25/02/09         NZD         0.7485           Phenytoin 50mg/ml amp         25/02/09         NZD         0.7485           Ranitidine 25mg/mL amp         25/02/09         NZD         0.7485           Suxamethonium 100mg/2ml amp         25/02/09         NZD         0.7485           Amoxycilin+Clavulanate 500mg+1         25/02/09         NZD         0.7485           Griseofulvin 500mg tab         25/02/09         NZD         0.7485           Sabutamol 4mg tab         25/02/09         NZD         0.7485           Seloutamol 4mg tab         25/02/09         NZD         0.7485           Blood test strips - Advantage II (50         12/03/09         NZD         0.7485           Blood test strips - Advantage II (50         12/03/09         NZD         0.7485           Naloxone 400mcg/ml amp         31/03/09         NZD         0.7485           Naloxone 400mcg/ml amp         31/03/09	Item         Date         Cur         Rate         Price           Chloramphenicol 5% ear drops         25/02/09         NZD         0.7485         3.55           Phenytoin 50mg/ml amp         25/02/09         NZD         0.7485         3.55           Phenytoin 50mg/ml amp         25/02/09         NZD         0.7485         13.65           Suxamethonium 100mg/2ml amp         25/02/09         NZD         0.7485         30.6           Suxamethonium 100mg/2ml amp         25/02/09         NZD         0.7485         66.00           Enalapril 5mg tab         25/02/09         NZD         0.7485         310           Griseofulvin 500mg tab         25/02/09         NZD         0.7485         31.0           Sabutamol 4mg tab         25/02/09         NZD         0.7485         32.5           Metformin 500mg tab         25/02/09         NZD         0.7485         32.5           Naloxone 400mcg/ml amp         31/03/09         NZD	Item         Date         Cur         Rate         Price         Pac           Chloramphenicol 5% ear drops         25/02/09         NZD         0.7485         3.55         1           Phenytoin 50mg/ml amp         25/02/09         NZD         0.7485         115.0         5           Ranitidine 25mg/mL amp         25/02/09         NZD         0.7485         13.65         5           Suxamethonium 100mg/2ml amp         25/02/09         NZD         0.7485         230.3         50           Amoxycilin+Clavulanate 500mg+1         25/02/09         NZD         0.7485         31.0         100           Enalapril 5mg tab         25/02/09         NZD         0.7485         31.0         100           Griseofulvin 500mg tab         25/02/09         NZD         0.7485         31.0         100           Griseofulvin 500mg tab         25/02/09         NZD         0.7485         32.5         1           Metformin 500mg tab         25/02/09         NZD         0.7485         32.5         1           Metformin 500mg tab         25/02/09         NZD         0.7485         30.25         1           Naloxone 400mog/ml amp         31/03/09         NZD         0.7485         30.25         1 <td>Item         Date         Cur         Rate         Price         Pac         Freight           Chloramphenicol 5% ear drops         25/02/09         NZD         0.7485         3.55         1         1.00           Phenytoin 50mg/ml amp         25/02/09         NZD         0.7485         115.0         5         1.00           Ranitidine 25mg/mL amp         25/02/09         NZD         0.7485         13.65         5         1.00           Suxamethonium 100mg/2ml amp         25/02/09         NZD         0.7485         23.03         50         1.00           Amoxycilin+Clavulanate 500mg+1         25/02/09         NZD         0.7485         3.10         100         1.00           Enalapril 5mg tab         25/02/09         NZD         0.7485         3.10         100         1.00           Griseofulvin 500mg tab         25/02/09         NZD         0.7485         3.00         1.00           Sabutamol 4mg tab         25/02/09         NZD         0.7485         3.25         1         1.00           Hydrocortisone 1% cream (15g tub         25/02/09         NZD         0.7485         3.25         1         1.00           Blood test strips - Advantage I (50         12/03/09         NZD         <t< td=""><td>Item         Date         Cur         Rate         Price         Pac         Freight         S           Chloramphenicol 5% ear drops         25/02/09         NZD         0.7485         3.55         1         1.00        </td><td>Item         Date         Cur         Rate         Price         Pac         Freight         S         Cost           Chloramphenicol 5% ear drops         25/02/09         NZD         0.7485         3.55         1         1.00         2.265           Phenytoin 50mg/ml amp         25/02/09         NZD         0.7485         13.65         5         1.00         86.12           Ranitidine 25mg/mL amp         25/02/09         NZD         0.7485         13.65         5         1.00         10.21           Suxamethonium 100mg/2ml amp         25/02/09         NZD         0.7485         3.10         100         1.00         49.40           Enalapril 5mg tab         25/02/09         NZD         0.7485         3.10         100         1.00         2.32           Griseofulvin 500mg tab         25/02/09         NZD         0.7485         3.10         100         1.00         2.43           Metformin 500mg tab         25/02/09         NZD         0.7485         3.25         1         1.00         2.43           Metformin 500mg tab         25/02/09         NZD         0.7485         3.25         1         1.00         2.43           Metformin 500mg tab         25/02/09         NZD<td>Item         Date         Cur         Rate         Price         Pac         Freight         S         Cost         Adj Cost           Chloramphenicol 5% ear drops         25/02/03         NZD         0.7485         3.55         1         1.00         2.65         2.6571           Phenytoin 50mg/ml amp         25/02/03         NZD         0.7485         1.55         1         0.00         86.12         17.2259           Ranitidine 25mg/mL amp         25/02/03         NZD         0.7485         13.65         5         1.00         86.12         17.2259           Ranitidine 25mg/mL amp         25/02/03         NZD         0.7485         13.65         5         1.00         10.21         2.0434           Suxamethonium 100mg/2ml amp         25/02/09         NZD         0.7485         66.00         100         1.00         49.40         0.4940           Enalapril 5mg tab         25/02/09         NZD         0.7485         3.10         1.00         2.32         0.0232           Griseofulvin 500mg tab         25/02/09         NZD         0.7485         3.10         1.00         2.32         0.0212           Sabutamol 4mg tab         25/02/09         NZD         0.7485         3.05         &lt;</td><td>New Quote         Delete Quote         Show:         All           Item         Date         Cur         Rate         Price         Pac         Freight         S         Cost         Adj Cost         Pri           Chloramphenicol 5% ear drops         25/02/09         NZD         0.7485         3.55         1         1.00         2.65         2.6571            Phenytoin 50mg/ml amp         25/02/09         NZD         0.7485         13.65         5         1.00         86.12         17.2259            Raritidine 25mg/mL amp         25/02/09         NZD         0.7485         13.65         5         1.00         10.21         2.0434            Suxamethonium 100mg/2ml amp         25/02/09         NZD         0.7485         13.65         5         1.00         172.38         3.4477            Amoxycilin+Clavulanate 500mg+1         25/02/09         NZD         0.7485         3.10         100         1.00         49.40         0.4940            Enalapril 5mg tab         25/02/09         NZD         0.7485         3.10         100         1.00         2.32         0.0232            Sabutamol 4mg tab         25/02/09<!--</td--><td>New Quote         Delete Quote         Show:         All           Item         Date         Cu         Rate         Price         Pac         Freight         S         Cost         Adj Cost         Pri         Vaid Unbit            Chloramphenicol 5% ear drops         25/02/09         NZD         0.7485         3.55         1         1.00         2.65         2.6571         20/03/09           Phenytoin 50mg/ml amp         25/02/09         NZD         0.7485         13.65         5         1.00         86.12         17.2259         20/03/09           Raritidine 25mg/mL amp         25/02/09         NZD         0.7485         13.65         5         1.00         10.21         2.0434         20/03/09           Suxamethonium 100mg/2ml amp         25/02/09         NZD         0.7485         13.65         5         1.00         172.38         3.4477         20/03/09           Amoxycilin+Clavulanate 500mg+1         25/02/09         NZD         0.7485         3.10         100         1.00         49.40         0.4940         20/03/09           Griseofulvin 500mg tab         25/02/09         NZD         0.7485         3.10         100         1.00         2.32         0.0232         20/03/0</td><td>New Quote         Delete Quote         Show:         All           Item         Date         Cur         Rate         Price         Pac         Freight         S         Cost         Adj Cost         Pr         Vaid Unbit          Comment           Chloramphenicol 5% ear drops         25/02/09         NZD         0.7485         3.55         1         1.00         2.65         2.6571         20/03/09         NZ. Air freight           Phenytoin 50mg/mi amp         25/02/09         NZD         0.7485         1.15.0         5         1.00         2.65         2.6571         20/03/09         NZ. Air freight           Raritidine 25mg/mL amp         25/02/09         NZD         0.7485         1.365         5         1.00         10.21         2.0434         20/03/09         NZ. Air freight           Amoxycilin+Clavulanate 500mg+1         25/02/09         NZD         0.7485         3.10         100         1.02         2.0232         20/03/09         NZ. Air freight           Amoxycilin+Clavulanate 500mg+1         25/02/09         NZD         0.7485         3.10         100         1.00         2.32         0.0232         20/03/09         urk brand, india. air           Griseofulvin 500mg tab         25/02/09</td></td></td></t<></td>	Item         Date         Cur         Rate         Price         Pac         Freight           Chloramphenicol 5% ear drops         25/02/09         NZD         0.7485         3.55         1         1.00           Phenytoin 50mg/ml amp         25/02/09         NZD         0.7485         115.0         5         1.00           Ranitidine 25mg/mL amp         25/02/09         NZD         0.7485         13.65         5         1.00           Suxamethonium 100mg/2ml amp         25/02/09         NZD         0.7485         23.03         50         1.00           Amoxycilin+Clavulanate 500mg+1         25/02/09         NZD         0.7485         3.10         100         1.00           Enalapril 5mg tab         25/02/09         NZD         0.7485         3.10         100         1.00           Griseofulvin 500mg tab         25/02/09         NZD         0.7485         3.00         1.00           Sabutamol 4mg tab         25/02/09         NZD         0.7485         3.25         1         1.00           Hydrocortisone 1% cream (15g tub         25/02/09         NZD         0.7485         3.25         1         1.00           Blood test strips - Advantage I (50         12/03/09         NZD <t< td=""><td>Item         Date         Cur         Rate         Price         Pac         Freight         S           Chloramphenicol 5% ear drops         25/02/09         NZD         0.7485         3.55         1         1.00        </td><td>Item         Date         Cur         Rate         Price         Pac         Freight         S         Cost           Chloramphenicol 5% ear drops         25/02/09         NZD         0.7485         3.55         1         1.00         2.265           Phenytoin 50mg/ml amp         25/02/09         NZD         0.7485         13.65         5         1.00         86.12           Ranitidine 25mg/mL amp         25/02/09         NZD         0.7485         13.65         5         1.00         10.21           Suxamethonium 100mg/2ml amp         25/02/09         NZD         0.7485         3.10         100         1.00         49.40           Enalapril 5mg tab         25/02/09         NZD         0.7485         3.10         100         1.00         2.32           Griseofulvin 500mg tab         25/02/09         NZD         0.7485         3.10         100         1.00         2.43           Metformin 500mg tab         25/02/09         NZD         0.7485         3.25         1         1.00         2.43           Metformin 500mg tab         25/02/09         NZD         0.7485         3.25         1         1.00         2.43           Metformin 500mg tab         25/02/09         NZD<td>Item         Date         Cur         Rate         Price         Pac         Freight         S         Cost         Adj Cost           Chloramphenicol 5% ear drops         25/02/03         NZD         0.7485         3.55         1         1.00         2.65         2.6571           Phenytoin 50mg/ml amp         25/02/03         NZD         0.7485         1.55         1         0.00         86.12         17.2259           Ranitidine 25mg/mL amp         25/02/03         NZD         0.7485         13.65         5         1.00         86.12         17.2259           Ranitidine 25mg/mL amp         25/02/03         NZD         0.7485         13.65         5         1.00         10.21         2.0434           Suxamethonium 100mg/2ml amp         25/02/09         NZD         0.7485         66.00         100         1.00         49.40         0.4940           Enalapril 5mg tab         25/02/09         NZD         0.7485         3.10         1.00         2.32         0.0232           Griseofulvin 500mg tab         25/02/09         NZD         0.7485         3.10         1.00         2.32         0.0212           Sabutamol 4mg tab         25/02/09         NZD         0.7485         3.05         &lt;</td><td>New Quote         Delete Quote         Show:         All           Item         Date         Cur         Rate         Price         Pac         Freight         S         Cost         Adj Cost         Pri           Chloramphenicol 5% ear drops         25/02/09         NZD         0.7485         3.55         1         1.00         2.65         2.6571            Phenytoin 50mg/ml amp         25/02/09         NZD         0.7485         13.65         5         1.00         86.12         17.2259            Raritidine 25mg/mL amp         25/02/09         NZD         0.7485         13.65         5         1.00         10.21         2.0434            Suxamethonium 100mg/2ml amp         25/02/09         NZD         0.7485         13.65         5         1.00         172.38         3.4477            Amoxycilin+Clavulanate 500mg+1         25/02/09         NZD         0.7485         3.10         100         1.00         49.40         0.4940            Enalapril 5mg tab         25/02/09         NZD         0.7485         3.10         100         1.00         2.32         0.0232            Sabutamol 4mg tab         25/02/09<!--</td--><td>New Quote         Delete Quote         Show:         All           Item         Date         Cu         Rate         Price         Pac         Freight         S         Cost         Adj Cost         Pri         Vaid Unbit            Chloramphenicol 5% ear drops         25/02/09         NZD         0.7485         3.55         1         1.00         2.65         2.6571         20/03/09           Phenytoin 50mg/ml amp         25/02/09         NZD         0.7485         13.65         5         1.00         86.12         17.2259         20/03/09           Raritidine 25mg/mL amp         25/02/09         NZD         0.7485         13.65         5         1.00         10.21         2.0434         20/03/09           Suxamethonium 100mg/2ml amp         25/02/09         NZD         0.7485         13.65         5         1.00         172.38         3.4477         20/03/09           Amoxycilin+Clavulanate 500mg+1         25/02/09         NZD         0.7485         3.10         100         1.00         49.40         0.4940         20/03/09           Griseofulvin 500mg tab         25/02/09         NZD         0.7485         3.10         100         1.00         2.32         0.0232         20/03/0</td><td>New Quote         Delete Quote         Show:         All           Item         Date         Cur         Rate         Price         Pac         Freight         S         Cost         Adj Cost         Pr         Vaid Unbit          Comment           Chloramphenicol 5% ear drops         25/02/09         NZD         0.7485         3.55         1         1.00         2.65         2.6571         20/03/09         NZ. Air freight           Phenytoin 50mg/mi amp         25/02/09         NZD         0.7485         1.15.0         5         1.00         2.65         2.6571         20/03/09         NZ. Air freight           Raritidine 25mg/mL amp         25/02/09         NZD         0.7485         1.365         5         1.00         10.21         2.0434         20/03/09         NZ. Air freight           Amoxycilin+Clavulanate 500mg+1         25/02/09         NZD         0.7485         3.10         100         1.02         2.0232         20/03/09         NZ. Air freight           Amoxycilin+Clavulanate 500mg+1         25/02/09         NZD         0.7485         3.10         100         1.00         2.32         0.0232         20/03/09         urk brand, india. air           Griseofulvin 500mg tab         25/02/09</td></td></td></t<>	Item         Date         Cur         Rate         Price         Pac         Freight         S           Chloramphenicol 5% ear drops         25/02/09         NZD         0.7485         3.55         1         1.00	Item         Date         Cur         Rate         Price         Pac         Freight         S         Cost           Chloramphenicol 5% ear drops         25/02/09         NZD         0.7485         3.55         1         1.00         2.265           Phenytoin 50mg/ml amp         25/02/09         NZD         0.7485         13.65         5         1.00         86.12           Ranitidine 25mg/mL amp         25/02/09         NZD         0.7485         13.65         5         1.00         10.21           Suxamethonium 100mg/2ml amp         25/02/09         NZD         0.7485         3.10         100         1.00         49.40           Enalapril 5mg tab         25/02/09         NZD         0.7485         3.10         100         1.00         2.32           Griseofulvin 500mg tab         25/02/09         NZD         0.7485         3.10         100         1.00         2.43           Metformin 500mg tab         25/02/09         NZD         0.7485         3.25         1         1.00         2.43           Metformin 500mg tab         25/02/09         NZD         0.7485         3.25         1         1.00         2.43           Metformin 500mg tab         25/02/09         NZD <td>Item         Date         Cur         Rate         Price         Pac         Freight         S         Cost         Adj Cost           Chloramphenicol 5% ear drops         25/02/03         NZD         0.7485         3.55         1         1.00         2.65         2.6571           Phenytoin 50mg/ml amp         25/02/03         NZD         0.7485         1.55         1         0.00         86.12         17.2259           Ranitidine 25mg/mL amp         25/02/03         NZD         0.7485         13.65         5         1.00         86.12         17.2259           Ranitidine 25mg/mL amp         25/02/03         NZD         0.7485         13.65         5         1.00         10.21         2.0434           Suxamethonium 100mg/2ml amp         25/02/09         NZD         0.7485         66.00         100         1.00         49.40         0.4940           Enalapril 5mg tab         25/02/09         NZD         0.7485         3.10         1.00         2.32         0.0232           Griseofulvin 500mg tab         25/02/09         NZD         0.7485         3.10         1.00         2.32         0.0212           Sabutamol 4mg tab         25/02/09         NZD         0.7485         3.05         &lt;</td> <td>New Quote         Delete Quote         Show:         All           Item         Date         Cur         Rate         Price         Pac         Freight         S         Cost         Adj Cost         Pri           Chloramphenicol 5% ear drops         25/02/09         NZD         0.7485         3.55         1         1.00         2.65         2.6571            Phenytoin 50mg/ml amp         25/02/09         NZD         0.7485         13.65         5         1.00         86.12         17.2259            Raritidine 25mg/mL amp         25/02/09         NZD         0.7485         13.65         5         1.00         10.21         2.0434            Suxamethonium 100mg/2ml amp         25/02/09         NZD         0.7485         13.65         5         1.00         172.38         3.4477            Amoxycilin+Clavulanate 500mg+1         25/02/09         NZD         0.7485         3.10         100         1.00         49.40         0.4940            Enalapril 5mg tab         25/02/09         NZD         0.7485         3.10         100         1.00         2.32         0.0232            Sabutamol 4mg tab         25/02/09<!--</td--><td>New Quote         Delete Quote         Show:         All           Item         Date         Cu         Rate         Price         Pac         Freight         S         Cost         Adj Cost         Pri         Vaid Unbit            Chloramphenicol 5% ear drops         25/02/09         NZD         0.7485         3.55         1         1.00         2.65         2.6571         20/03/09           Phenytoin 50mg/ml amp         25/02/09         NZD         0.7485         13.65         5         1.00         86.12         17.2259         20/03/09           Raritidine 25mg/mL amp         25/02/09         NZD         0.7485         13.65         5         1.00         10.21         2.0434         20/03/09           Suxamethonium 100mg/2ml amp         25/02/09         NZD         0.7485         13.65         5         1.00         172.38         3.4477         20/03/09           Amoxycilin+Clavulanate 500mg+1         25/02/09         NZD         0.7485         3.10         100         1.00         49.40         0.4940         20/03/09           Griseofulvin 500mg tab         25/02/09         NZD         0.7485         3.10         100         1.00         2.32         0.0232         20/03/0</td><td>New Quote         Delete Quote         Show:         All           Item         Date         Cur         Rate         Price         Pac         Freight         S         Cost         Adj Cost         Pr         Vaid Unbit          Comment           Chloramphenicol 5% ear drops         25/02/09         NZD         0.7485         3.55         1         1.00         2.65         2.6571         20/03/09         NZ. Air freight           Phenytoin 50mg/mi amp         25/02/09         NZD         0.7485         1.15.0         5         1.00         2.65         2.6571         20/03/09         NZ. Air freight           Raritidine 25mg/mL amp         25/02/09         NZD         0.7485         1.365         5         1.00         10.21         2.0434         20/03/09         NZ. Air freight           Amoxycilin+Clavulanate 500mg+1         25/02/09         NZD         0.7485         3.10         100         1.02         2.0232         20/03/09         NZ. Air freight           Amoxycilin+Clavulanate 500mg+1         25/02/09         NZD         0.7485         3.10         100         1.00         2.32         0.0232         20/03/09         urk brand, india. air           Griseofulvin 500mg tab         25/02/09</td></td>	Item         Date         Cur         Rate         Price         Pac         Freight         S         Cost         Adj Cost           Chloramphenicol 5% ear drops         25/02/03         NZD         0.7485         3.55         1         1.00         2.65         2.6571           Phenytoin 50mg/ml amp         25/02/03         NZD         0.7485         1.55         1         0.00         86.12         17.2259           Ranitidine 25mg/mL amp         25/02/03         NZD         0.7485         13.65         5         1.00         86.12         17.2259           Ranitidine 25mg/mL amp         25/02/03         NZD         0.7485         13.65         5         1.00         10.21         2.0434           Suxamethonium 100mg/2ml amp         25/02/09         NZD         0.7485         66.00         100         1.00         49.40         0.4940           Enalapril 5mg tab         25/02/09         NZD         0.7485         3.10         1.00         2.32         0.0232           Griseofulvin 500mg tab         25/02/09         NZD         0.7485         3.10         1.00         2.32         0.0212           Sabutamol 4mg tab         25/02/09         NZD         0.7485         3.05         <	New Quote         Delete Quote         Show:         All           Item         Date         Cur         Rate         Price         Pac         Freight         S         Cost         Adj Cost         Pri           Chloramphenicol 5% ear drops         25/02/09         NZD         0.7485         3.55         1         1.00         2.65         2.6571            Phenytoin 50mg/ml amp         25/02/09         NZD         0.7485         13.65         5         1.00         86.12         17.2259            Raritidine 25mg/mL amp         25/02/09         NZD         0.7485         13.65         5         1.00         10.21         2.0434            Suxamethonium 100mg/2ml amp         25/02/09         NZD         0.7485         13.65         5         1.00         172.38         3.4477            Amoxycilin+Clavulanate 500mg+1         25/02/09         NZD         0.7485         3.10         100         1.00         49.40         0.4940            Enalapril 5mg tab         25/02/09         NZD         0.7485         3.10         100         1.00         2.32         0.0232            Sabutamol 4mg tab         25/02/09 </td <td>New Quote         Delete Quote         Show:         All           Item         Date         Cu         Rate         Price         Pac         Freight         S         Cost         Adj Cost         Pri         Vaid Unbit            Chloramphenicol 5% ear drops         25/02/09         NZD         0.7485         3.55         1         1.00         2.65         2.6571         20/03/09           Phenytoin 50mg/ml amp         25/02/09         NZD         0.7485         13.65         5         1.00         86.12         17.2259         20/03/09           Raritidine 25mg/mL amp         25/02/09         NZD         0.7485         13.65         5         1.00         10.21         2.0434         20/03/09           Suxamethonium 100mg/2ml amp         25/02/09         NZD         0.7485         13.65         5         1.00         172.38         3.4477         20/03/09           Amoxycilin+Clavulanate 500mg+1         25/02/09         NZD         0.7485         3.10         100         1.00         49.40         0.4940         20/03/09           Griseofulvin 500mg tab         25/02/09         NZD         0.7485         3.10         100         1.00         2.32         0.0232         20/03/0</td> <td>New Quote         Delete Quote         Show:         All           Item         Date         Cur         Rate         Price         Pac         Freight         S         Cost         Adj Cost         Pr         Vaid Unbit          Comment           Chloramphenicol 5% ear drops         25/02/09         NZD         0.7485         3.55         1         1.00         2.65         2.6571         20/03/09         NZ. Air freight           Phenytoin 50mg/mi amp         25/02/09         NZD         0.7485         1.15.0         5         1.00         2.65         2.6571         20/03/09         NZ. Air freight           Raritidine 25mg/mL amp         25/02/09         NZD         0.7485         1.365         5         1.00         10.21         2.0434         20/03/09         NZ. Air freight           Amoxycilin+Clavulanate 500mg+1         25/02/09         NZD         0.7485         3.10         100         1.02         2.0232         20/03/09         NZ. Air freight           Amoxycilin+Clavulanate 500mg+1         25/02/09         NZD         0.7485         3.10         100         1.00         2.32         0.0232         20/03/09         urk brand, india. air           Griseofulvin 500mg tab         25/02/09</td>	New Quote         Delete Quote         Show:         All           Item         Date         Cu         Rate         Price         Pac         Freight         S         Cost         Adj Cost         Pri         Vaid Unbit            Chloramphenicol 5% ear drops         25/02/09         NZD         0.7485         3.55         1         1.00         2.65         2.6571         20/03/09           Phenytoin 50mg/ml amp         25/02/09         NZD         0.7485         13.65         5         1.00         86.12         17.2259         20/03/09           Raritidine 25mg/mL amp         25/02/09         NZD         0.7485         13.65         5         1.00         10.21         2.0434         20/03/09           Suxamethonium 100mg/2ml amp         25/02/09         NZD         0.7485         13.65         5         1.00         172.38         3.4477         20/03/09           Amoxycilin+Clavulanate 500mg+1         25/02/09         NZD         0.7485         3.10         100         1.00         49.40         0.4940         20/03/09           Griseofulvin 500mg tab         25/02/09         NZD         0.7485         3.10         100         1.00         2.32         0.0232         20/03/0	New Quote         Delete Quote         Show:         All           Item         Date         Cur         Rate         Price         Pac         Freight         S         Cost         Adj Cost         Pr         Vaid Unbit          Comment           Chloramphenicol 5% ear drops         25/02/09         NZD         0.7485         3.55         1         1.00         2.65         2.6571         20/03/09         NZ. Air freight           Phenytoin 50mg/mi amp         25/02/09         NZD         0.7485         1.15.0         5         1.00         2.65         2.6571         20/03/09         NZ. Air freight           Raritidine 25mg/mL amp         25/02/09         NZD         0.7485         1.365         5         1.00         10.21         2.0434         20/03/09         NZ. Air freight           Amoxycilin+Clavulanate 500mg+1         25/02/09         NZD         0.7485         3.10         100         1.02         2.0232         20/03/09         NZ. Air freight           Amoxycilin+Clavulanate 500mg+1         25/02/09         NZD         0.7485         3.10         100         1.00         2.32         0.0232         20/03/09         urk brand, india. air           Griseofulvin 500mg tab         25/02/09

You can view the quotations you have entered in mSupply for this supplier.

## Notes tab

To add, edit or delete a note, click on the Notes tab, and this window displays:

Edit customer/	supplier					
Seneral nvoices Backorders	Multichem Exports I	utd		Store: General	•	i
Quotes	_	Delete Note				
lotes Contacts	Date		Note			*
mails iroup	03/06/11	Open day - 1 July 2011, 10:00-20:00				
urchase orders /eb log-in avourites						
tock history tore						
						+
				OK & Next	Cancel	OK

Click on *New note* to create a note, or select an existing note and double click on it to view, edit or delete it.

Add C	Customer/Supplier notes	x
	01/12/11 Modfied by: Sussol	
Note	Closed for stocktaking - 30/31 December	•
		,
Display	when Purchase Order is created  Pick Color Beep 0 times	
Uspilly	never all Supplier Invoice is created	
	Purchase Order is created Goods Receipt is created Customer Invoice is created	

- The date on which you are entering a new 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 a Supplier invoice is created, when a Purchase Order is created, etc..

If **never** is chosen, the note will never be displayed on screen, and if *all* is chosen, it will display for all events for this customer/supplier. 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 customer/supplier.

Subsequently, when this customer/supplier is selected and depending on the display settings made, the note will appear on screen; be aware that the note does not disappear automatically - you must close it/them manually.

The text of a note can be up to 32,000 characters.

Click **OK** when you are finished.

## **Contacts tab**

voices ackorders uotes otes	Add Contact Delete	e Contact			Store: Badili	AMS 🗸
ontacts roup urchase orders em lists equisitions tore hoto	First	Last	Position	Email	Phone	Category
						~

#### **Adding contact**

To add a contact for this customer or supplier, click the **Add contact** button , then enter the details in the window that appears.

🖢 Add a contact	
Last	Web Login
First	Can login to the web interface
Position	Username Password
Phone	
Email	Groups
Address 1	This contact belongs to the following groups:
Address 2	
Country	Add Group Remove Group
Comment	^
Category	
Category 2	
Category 3	
Info if related to a customer or supplier.	
Name Name	
	Cancel OK

## **Deleting a contact**

To delete a contact, click on the contact you wish to delete, then click the **Delete contact** button.

## Group tab

General	London Dispensary	Store: General 👻 👔
Invoices		
Backorders		
Quotes	Customer group none	
Notes	Item departments which can be supplied to this group.	
Contacts		
Emails	Item departments	
Group		
Purchase orders		
Web log-in		
Favourites		
Stock history		
Store		
	Warning: setting a customer group can affect which items can be supplied to	them
	[2] 전 : 그는 것은 가지 않는 것은 것을 가지 않는 것을 것을 했다.	
		OK & Next Cancel OK

If this customer has been added to a group, this tab displays the name of that group. An explanation of groups and how to work with them is here: Show groups...

Customer group Item departmen	none hospital > 50 beds hospital < 50 beds Urban clinic Rural clinic MCH clinic Island health post		group.
----------------------------------	--	--	--------

Here you can select the group of which a customer is a member. When you choose a group, you will be shown a list of item departments which are linked to the chosen group. Once the group system is activated in the Preferences, only items belonging to one of the listed departments (or items with no department) may be supplied to that customer.

## **Purchase orders tab**

neral	International	Dispensa	ary Associatio				Store: General 🔻
ckorders totes tes intacts vails oup rchase orders eb log-in vounites ock history ore	Ord no 100 s 123 c 193 f 325 c 291 c 358 c 404 c 410 c 424 s 432 c	10 10 10 10 10 10 10 10 10 10 10 10 10 1	Date 17/12/08 28/01/09 24/06/09 25/03/10 05/01/10 20/07/10 15/12/10 15/12/10 22/03/11 30/06/11		Target days 0 0 0 21 0 0 0 0 0 0 0	2 192 110 3 50 4 23 101	
	٩.			_			TTT P

This tab shows a view of Purchase Orders for the current name, and applies to suppliers only.

## Web log-in tab

Le Edit customer/s	upplier	
General Invoices	International Dispensary Associatio	Store: General 👻
Backorders Quotes Notes Contacts	Customer / Supplier user name	
Emails Group Purchase orders Web log-in	Connection speed Low	
Favourites Stock history Store		
		OK & Next Cancel OK

If you are allowing customers to access their order information using the mSupply web server, this is the window where you assign a logon name and password to a customer.

Also displayed on this tab is the internet connection speed. It should be noted that this value is derived from your network settings, and may not be edited manually.

## Item lists tab

23/31

eneral voices ickorders	checkitem									Store		1
uotes	Item lists attached to this r							ttems		1	Default Order Days	Ō
otes intacts roup irchase Orders	Add master Delete in ist							T	tem ode		Item name	^
en Liet equisitions ore Visibility ioto	List name	Master list	Imprest	Stock Takes	Web	Price	~					
itom data I IS												
	4						, ×					÷
	Style		put to		-		Orderin		od			
	Sort by Group 🔍 🗸		) Printer ) Excel		Gener	lane l	1.000	nprest tocktak	85			
	_											

This tab is used to assign master lists to customers for use in requisitions and mSupply mobile. For more information, see Item master lists.

**Note:** Before version 5.3 customers could also have local lists assigned to them (they applied to that customer only) but these have been removed from version 5.3 onwards.

## Stock history tab

General Invoices	Health Centre				Store:	General	•	×
Backorders Quotes	Id	Entered date	Stock take date		Status	Туре		1
Notes	753	11/09/09	11/09/09		Status	im		
Contacts	1650	22/02/10	22/02/10			im		
Emails	2106	19/05/10				im		
Group	2106	08/08/10	08/08/10	sg		im		
Purchase orders	3008	25/11/10	25/11/10					
Web log-in	3006	25/11/10	25/11/10	cn		im		
Favourites								
Stock history								
Store								
store								
							-	
								1
					OK & N	ext Cancel		OK

A list of stock histories, showing dates of both the stock take and the date of entry into the computer, the ID reference, the status and the type, is displayed.

## **Store Visibility tab**

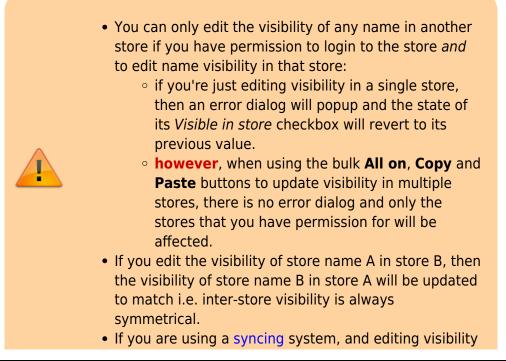
#### Updated version 4.12

The tab shows which stores the customer/supplier is visible in. Only when the visibility checkbox is checked will the customer/supplier be visible to 'this' store, which is needed if the store will receive and/or issue goods from 'this' store.

• • •		Edit customer/supplier		
General Invoices Backorders	Test customer Search stores		Store: General	•
Quotes		Stores	Visible in store	
Notes	General			_
Contacts	Registration			
Group	Test dispensary		i i	
Purchase Orders				
Item List				
Requisitions Store Visibility				
Photo				
Custom data				
Log				
Supplier Hub				
Tags				
	All on Copy	Paste	OK & Next Cancel	ОК

There can be a huge number of stores in this list. If you want to find a particular store or group of stores you can type in the *Search stores* field just above the list. This will restrict the list to only stores with a name that contains what you have typed.

- All on button: When clicked, this will check all the checkboxes in the *Visible in store* column and the button label will change to *All off*. Clicking it then will uncheck all the checkboxes.
- **Copy button**: Will copy the current state of the *Visible in store* checkboxes.
- **Paste button**: Will make the current state of all the *Visible in store* checkboxes the same as it was when the **Copy** button was clicked.



for a store name, that can affect the sync settings for the store on other sites i.e. if you make it invisible to all stores which are **Active** on a site, then the sync status will become **None** on that site; and if you make it visible to at least one store which is **Active** on a site, then the sync status will become **Transfer** on that site - see Store sync-with options.
In a syncing system, facility names (customers, suppliers, etc.) can only be created and edited on the primary sonver.

suppliers, etc.) can only be created and edited on the primary server. Patients can be created in any dispensary, including on a sync site. After that, their visibility is controlled on the central server (after they sync there) in the same way as other names, so everything on this tab (including the **All on, Copy** and **Paste** buttons) will be read only on a sync satellite.

When a customer / supplier is created, it will only be made visible in:

- its home store (the store that you are logged into when the name is created; see Home store for details), and
- any other stores *if* their store preference Names created in other stores not visible in this store is switched OFF (there's an equivalent store preference for patients, which can be switched OFF to make new patients visible in other dispensary stores) - see Store preferences for more details.

## Photo tab

On this tab you can assign a photo of the customer or supplier and set their world map coordinates. Both of these can be used in reports.

			Edit custome	/supplier				
ieneral nvoices iackorders	Test customer 01					Store:	Central Contracep	tiv
ackorders Quotes lotes	Add photo	Delete Photo		0 КЬ		Map coordi	nates	
iontacts iroup					Map coordinates: Lat		0	
urchase Orders					Long		0	
lequisitions tore Visibility						View on	Мар	
hoto ustom data								
ig Supply Link								
ags								
					OK & N		Cancel	ОК

#### Adding or deleting a Photo

To add a photo, either copy the contents of a file to the clipboard and paste them into the image area or click on the **Add photo** button and select the picture file (png, jpg, bmp or gif files supported).

To delete a photo either click on it in the image area and press the delete key on your keyboard or click on the **Delete photo** button.

#### Map coordinates

2025/06/28 02:53

- You can use Google Maps to find latitude and longitude of a customer.
- The first number is the longitude, and the second number is the latitude.
- Enter these numbers into the provided fields in mSupply

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• You can then view the customers location by clicking the **View on Map** button.

## **Custom data tab**

• • •	Edit customer/supplier	
General	Test customer 01	
Invoices		Store: General O
Backorders		
Quotes	New field 1	
Notes	New field 2 0	
Contacts		
Group	New field 3	
Purchase Orders		
Item List	New field 4 00/00/00	
Requisitions	New field 5	
Store Visibility		
Photo		
Custom data		
Log		
Supplier Hub		
Tags		
		OK & Next Cancel OK

This tab shows all the custom fields that have been set up in the preferences. See the 16.11. Custom fields page for details.

You can edit or enter values in the fields as required. When you click on the **OK** or **OK & Next** buttons the values will be saved.

## Log tab

• • •					Edit custom	er/supplier		
General Invoices	Test custo	mer 01					Store: General	•
Backorders Quotes	Di	ate	Time	User	Event type	1	Event	
Notes	04/0	5/2021	15:44:08 su	ssol	Create name	Name created		
Contacts								
Group								
Purchase Orders								
Item List								
Requisitions								
Store Visibility								
Photo								
Custom data								
Log								
Supplier Hub		_						
Tags								
		_						
		_						
						C	OK & Next Cancel	ок

This tab shows a list of all the log entries that belong to this name. These entries will also appear with all the other logs for other events throughout mSupply in the log. See the 25.19. The system log page for details.

If you want to see more details about one of the logs, double-click on it in the list and a detail window, populated with the log's details, will open.

## Supplier hub tab

Last update: 2023/09/30 01:47 names:adding\_and\_editing https://docs.msupply.org.nz/names:adding\_and\_editing?rev=1696038471

• • •			Edit customer/supplier	
General Invoices Backorders	Test customer 01 Hub Registration			Store: General 0
Quotes Notes Contacts Group Purchase Orders Item List		Site Name		
Requisitions Store Visibility Photo Custom data Log Supplier Hub Tags				Register
t øgs				
				OK & Next Cancel OK

This tab allows you to register suppliers in the mSupply supplier hub. Enter the site name you wish to register the supplier with in the **Site name** field and click on the **Register** button.

0 0		Edit customer/supplier	
General Invoices	Test customer 01		Store: General 0
Backorders			
Quotes	Tags	Use	
Notes	CustomerTag01		
Contacts	CustomerTag02		
roup	SupplierTag01		
urchase Orders	SupplierTag02		
em List			
equisitions			
tore Visibility			
hoto			
ustom data			
9			
upplier Hub			
ags			
			OK & Next Cancel OK

## Tags tab

This tab allows you to assign any name tags that you have setup to this name. The table shows a list of all the name tags currently setup in your system. To assign one to this name, simply check the corresponding checkbox in the *Use* column.

**Please note:** if you assign a tag to a name that is also a store, the tag will be copied to that store's store tags. See the 25.08. Virtual stores page for details on store tags.

See the 5.05. Name tags page for details on how to create and edit name tags.

Previous: 5. Customers and Suppliers | | Next: 5.02. Contacts

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Last update: 2023/09/30 01:47