

14.01. Notifications (Alerts)

Available in version 5.05 onwards

To help with the proper management of your stock, mSupply can inform you of things that need attention; transactions that need completing, stock that you are running out of etc.

This page will tell you how to set up and use the notifications (alerts) that mSupply can give you.



If you want to receive alerts via SMS, email or social media then you can use the mSupply dashboard for that. See the [mSupply dashboard](#) pages for details.

You can also get notifications/alerts for cold chain monitoring events. See the [20.03. Cold Chain App Notifications](#) page for details.

Setup

Set the store parameters



Configuration of store parameters including Notifications needs to be done on the Central server. The configuration settings will then need to sync out to the satellite store if it is on a satellite sync site.

Some of the notifications, like understocked or overstocked items, require some parameters to be set for each store. To set them choose *Special > Show stores* from the menus, double-click on the store to change the settings for and go to the *Preferences* tab. The settings you need to make are in the *Notifications* section.

All the details about these settings can be seen on the [26.08. Virtual stores](#) page.

Select which notifications a user will see



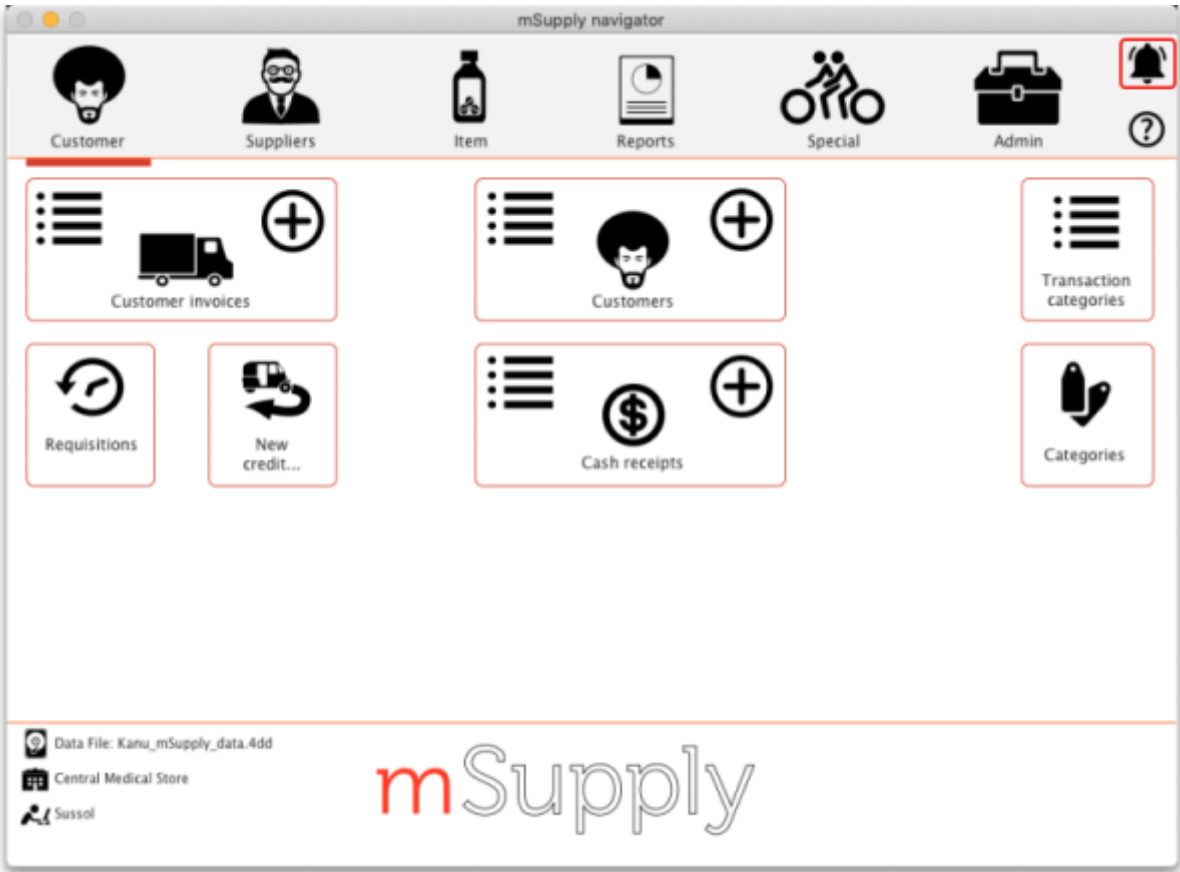
Configuration of user settings needs to be done on the site where the user is Active.

The notifications a user will see and whether they see them on login or only when they click on the Notification icon (see below) is set in a user's settings.

From the menus, select *File > Edit users*, double-click on the user you wish to adjust the settings for and click on the *Notifications* tab. The details on the various preferences and how to set them can be found on the [25.15. Managing users](#) page.

Notifications in use

On the top right of the Navigator, you will see the Notifications (bell) icon:



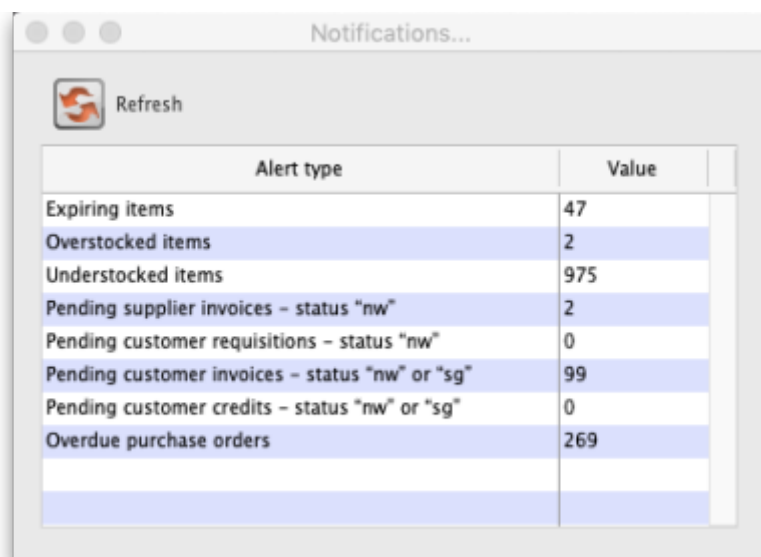
Click on it to show the notifications window:

The screenshot shows the Notifications window, which has a title bar with standard window controls and a 'Refresh' button with a circular arrow icon. A loading spinner is visible in the top right corner of the window. The main content is a table with two columns: 'Alert type' and 'Value'.

Alert type	Value
Expiring items	47
Overstocked items	Calculating...
Understocked items	Calculating...
Pending supplier invoices – status "nw"	2
Pending customer requisitions – status "nw"	0
Pending customer invoices – status "nw" or "sg"	99
Pending customer credits – status "nw" or "sg"	0
Overdue purchase orders	269

All the alerts selected to show for the logged-in user are displayed in the list and their values are calculated as the window opens. Some of the alerts might take a while to calculate, in which case you will see the word *Calculating...* in the *Value* column. While any of the alerts are still being calculated there will be a busy indicator in the top right hand corner of the window, as shown in the screenshot above.

When all the calculations are finished and the notifications are complete, the window will look like this:



The screenshot shows a window titled "Notifications...". Inside the window, there is a "Refresh" button with a circular arrow icon. Below the button is a table with two columns: "Alert type" and "Value". The table contains the following data:

Alert type	Value
Expiring items	47
Overstocked items	2
Understocked items	975
Pending supplier invoices – status "nw"	2
Pending customer requisitions – status "nw"	0
Pending customer invoices – status "nw" or "sg"	99
Pending customer credits – status "nw" or "sg"	0
Overdue purchase orders	269

The meaning of each notification:

- **Expiring items:** The number of items which have one or more batches whose expiry date is equal to or less than the threshold number of months away.
- **Overstocked items:** The number of items which, at the current rate of consumption (calculated using the last 12 months consumption data), have more than the threshold months of total stock. The calculation also takes into account the amount back ordered and on purchase orders still to be delivered. These items are in danger of expiring in the warehouse before they will be used.
- **Understocked items:** The number of items which, at the current rate of consumption (calculated using the last 12 months consumption data), have less than the threshold months of total stock. The calculation also takes into account the amount back ordered and on purchase orders still to be delivered. You are in danger of running out of stock of these items.
- **Pending supplier invoices:** The number of supplier invoices that are waiting for processing i.e. that have a status of new (*nw*) or suggested (*sg*). The goods on these supplier invoices have not yet been added to your stock.
- **Pending customer requisitions:** The number of customer requisitions that are at suggested (*sg*) status. These requisitions have not had a customer invoice created from them yet.
- **Pending customer invoices:** The number of customer invoices that are at new (*nw*) or suggested (*sg*) status. These invoices might have been picked but have not been confirmed yet so the goods on them are reserved for the customer (i.e. they have been removed from the **available** stock) but not removed from the **total** stock in your store.
- **Pending customer credits:** The number of customer credits that have new (*nw*) or suggested (*sg*) status. The goods on these customer credits have not yet been added to your stock and credited to the customers.
- **Overdue purchase orders:** The number of purchase orders that have at least one item on

them that has not been received by their expected delivery date (or does not have an expected delivery date).



If the user's *Show notifications window on login* preference is turned on, the notification window will open as soon as the user logs in and the notifications that are selected to show for the user will be displayed.

The notifications will not refresh automatically. To make sure they are up to date, click on the **Refresh** button and the notifications will be recalculated.

To find out which transactions or items are involved in any of the alerts, simply double-click on the notification. mSupply will then open the list of transactions or items that triggered the alert and you can investigate in the usual way.

Previous: [14. Notifications](#) | | Next: [15. Barcode Scanning](#)

From:

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

Permanent link:

https://docs.msupply.org.nz/notifications:setup_and_use?rev=1651468979

Last update: **2022/05/02 05:22**

