Updated: Version 4.02

NeedsUpdate

6.04. Ordering from one store to another

If you run mSupply using virtual stores then you can place an order for goods with another store within mSupply.

There are two ways you can do this:

- Create Purchase Orders. This method was the 'original' method, and is not recommended.
- The recommended (since mSupply v4.01) method is Internal Orders.



Internal orders are the desktop equivalent of supplier requisitions in mSupply mobile.

Internal Orders are a simpler and easier way to place orders to another store if you've already been using purchase orders and goods received records in your workflow:

- 1. In the requesting store:
 - 1. Create an Internal Order to the supplying store.
 - 2. When the internal order is finalised, a response requisition is automatically created in the supplying store
- 2. In the supplying store:
 - 1. One or more customer invoices can be created from a single response requisition
 - 2. When each customer invoice is finalised, a supplier invoice is automatically created in the requesting store

Internal Orders

Internal Orders are also known as supplier requisitions or request requisitions.

Entering an internal order

To begin the process, choose *Supplier* > *Show internal orders* or click on the *Internal orders* icon on the *Suppliers* tab of the Navigator:



The following window will open, showing you a list of all existing internal orders:

<u> </u>	elete			Show: Past 30 days
ID Name	Date entered	Order date	Status	Comment
6 Central Medical Store	30/07/2024	30/07/2024	sg	

Click on the Show drop down list to filter the list by the status of the internal orders:

Status Entered today	Entered to day		Show:	All Confirmed Finalised Completed	
	Suggested	atus		Entered today	
sg		sg		Suggested	

After filtering this way, if the list is too long to find a particular internal order you are interested in then you can type something in the Search field.

Either double-click on an existing order to edit it, or click the **New internal order** button to create a new one.

If you have activated programs in mSupply see the Programs heading below

The example below has a few lines already entered:

LL. Item rode Item name Unit Our stock monthly consume. Months of stock quantity quantity requested quantity 1000 11 Amoxyciiin 250mg tabs ea 43,962 17,651 2 8,993 9,000 2 NC0082 Paracetamoi 500mg tabs ea 43,962 17,651 2 8,993 9,000 3 NK0060 Doxycycline 100mg tabs ea 1,200 309 3 0 100 4 NK0100 Bandsge 15m x 5m ea 375 1117 3 0 50 5 ND0000 Rabies vacime ea 372 8 3 0 0 0 6 NK0059 Vitamin A 100,000 I.U. cops ea 14 0 2B 0 0 50 5 ND0010 Utemper ea 5,740 1,124 5 0 500 500 500 500 500 500 500 500 50	
2 NC0082 Paracetamol 500mg tabs ea 27,328 9,389 2 841 1,000 3 NP0060 Davycycline 100mg tab ea 1,200 309 3 0 100 4 NP0100 Bandage 15cm x 5m ea 375 117 3 0 50 5 ND0030 Rables vaccine ea 32 8 3 0 0 6 NP0050 Vitamin A 100,000 LU, caps ea 14 0 28 0 0	
3 NF0660 Doxycycline 100mg tab ea 1,200 309 3 0 100 4 NF0100 Bandage 15cm x 5m ea 375 117 3 0 50 5 ND0080 Rabies vaccine ea 32 8 3 0 0 6 NF0050 Vitamin A 100,000 I.U. caps ea 14 0 28 0 0	1
4 NP0100 Bandage 15cm x 5m ea 375 117 3 0 50 5 ND0080 Rables vaccine ea 32 8 3 0 0 6 NP0050 Vitamin A 100,000 I.U. caps ea 14 0 28 0 0	
S ND0080 Rables vaccine ea 32 8 3 0 0 6 NP0050 Vitamin A 100,000 LU, caps ea 14 0 28 0 0	
6 NF0050 Vitamin A 100,000 I.U. caps ea 14 0 28 0 0	
7 HC0010 CRS sachet (1 litre) ea 5,740 1,124 5 0 500	

- The *Name* will default to the supplying store for the current store, but any other store in the data file can be selected in the usual way (i.e. enter the first few characters and hit the *Tab* key to find matches).
- The Order date defaults to the current date. You can change it.
- Use either the **New line** button to manually add a single item, or **Add from master list** to add any items in the current store's master list which are not there already.
 - If adding from a master list, the cursor will go into the first new item's *User requested quantity* cell.

• If adding a single item, the cursor will go into the *User requested quantity* cell for that item when it has been added. When you click on the **New line** button, this window opens:

	Add item
Item Search item	
User requested 0	
Comment	
	Cancel OK & Next OK

- **Item:** Type the first few characters of the item's name and press the *Tab* key on the keyboard to select the item from a list of items whose name or code begins with what you typed.
- **User requested:** The quantity of units of the item the customer is requesting.
- Comment: Any comment you want the supplier to see for this item.
- Click on the OK button to add the line to the requisition, click the OK & Next button to add this line and empty the window so you can add another item right away or click the Cancel button to close the window without adding the current item to the requisition.
- For each item,
 - mSupply already knows Our stock on hand
 - mSupply calculates the Average monthly consumption based on what the store has issued over the last 12 months (or less if the store hasn't been operating that long).
 - mSupply calculates the Months of stock from Our current stock on hand and the Average monthly consumption (this is therefore the months of stock at the current rate of consumption).
 - The Calculated quantity is then worked out by multiplying the Average monthly consumption by the Max MOS (maximum months of stock), and then subtracting Our stock on hand. If the resulting value is negative, a value of will be displayed.
- If the Use consumption and stock from customers for internal orders store preference is turned on (see 25.08. Virtual stores, preferences for details) then the *Our current stock on hand* figure comes from the sum of all stock currently held by all the customers of this store and the stock consumed is taken as the stock issued to all customers. Note that customer stores are those that have this store set as their supplying store.
- The Max MOS is critical to this calculation, and you can change it.
 - There is an industry rule of thumb that the Max MOS should be set to 3 times the ordering cycle.
 - The default *Max MOS* is 3.0, which is based on an a monthly ordering cycle.
 - If, for example the ordering cycle was every two months, then *Max MOS* should be set to $3 \times 2 = 6.0$.
- Hitting the Tab key will move the cursor into the Comment cell and, if there's another line

- below, hitting *Tab* again will move the cursor into the next *User requested quantity* cell.
- If necessary, use the **Delete line(s)** button to remove selected item lines.

	e Central Medical Stores e 18/10/18	CMS		Referen	int regula	order			Man Black	Status :	13852 19
۲	kidd from master list Delete line(s)	Filter iten		Max MK hreshold MK	os 4 os 4		ck over thre	shald 🗹	Front	Entry date : Entered by :	
Li Rem code	Item name	Unit	Our stock on hand	Average monthly consump	Months of stock	Calculated quantity	User requested quantity		Comment		
1 NCD071	Amoxycillin 250mg tabs	ea	43,962	17,651	2	26,645	26,645				
2 NC0082	Paracetamol 500mg tabs	60	27,328	9,389	2	10,230	10,230				
3 NF0060	Doxycycline 100mg tab	e#	1,200		3						
4 NF0100	Bandage 15cm x 5m Rables vaccine	68	375	117	3	96	96 0				

If the order has a lot of item lines, you can filter them by typing into the *Filter items* field, which will change to display the number of visible items out of the total number in the order:

	Central Medical Stores	CMS		Referen			16		Round Black	ID: 13852
Order date	18/10/18				nt regular	order				Status: sg
New line Ad	dd from master list Delete line(s)	Fitter iter		Max Mi		Hide sto	ock over thre	shald 🗌	Print	Type: request Entry date: 18/10/18 Entered by: Admin Store: CO Test Store
ata entry Log										
Li Item code	Item name	Unit	Our stock on hand	Average monthly contump		Calculated quantity	User requested quantity		Comment	
1 NC0071	Amoxycillin 250mg tabs	63	43,962	17,651	2	8,993	9,000			
2 NC0082	Paracetamol 500mg tabs	ea	27,328	9,389	2		1,000			
7 NC0010	DRS sachet (Lithre)		5,740	1,124						
										3
e Sort order								Finalise	Cancel D	(& Next OK

Note that, while a filter is active, some of the other buttons are disabled e.g. you can't save the sort order unless all lines are visible.

You can also filter item lines which have a lot of stock (and therefore don't need to be ordered) by entering a value in the *Threshold MOS* field. This will automatically tick the *Hide stock over threshold* checkbox, and hide any lines which have their *Months of stock* greater than or equal to *Threshold MOS*.

Name Order date	Central Medical Stores	CMS		Referen	ce (ref nt (regular	nder			Black	D : Status :	13852 19
New line A	dd from master list. Delete line(s)	Filter item		Max MC hreshold MC	75 4	Hide sto	ck over thre	shold 🖌	Print	Entry date : Entered by :	
u Item code	Rem name	Unit	Our stock on hand	Average monthly consump	Months of stock	Calculated quantity	User requested quantity		Comment		
1 NC0071	Amorycillin 250mg tabs		43,962	17,651	2	8,993	8,993				
2 NC0082	Paracetamol 500mg tabs	ea	27,328	9,309	2	841	841				
3 NF0060	Doxycycline 100mg tab	ea	1,200	309	3	0	0				
4 NF0100	Bandage 15cm x 5m	ea	375	117	3	0	0				
5 ND0080	Rabies vaccine	eà	32	В	3	0	0				
e Sort order								Finalise	Cancel O	K & Next	OK

Once you are satisfied, tick the *Finalise* checkbox. This will prevent further editing, and automatically delete any lines which have a requested quantity of zero.

Name Order date	Central Medical Stores [18/10/18	CMS		Referen Comme	ce ref nt regular	rorder			Biack	10 : 13852 Status : fn
New line Ad	dd from master list Delete line(s)	Filter ites		Max Mi hreshold Mi	os (4	Hide sto	ck over thre	shold 💮	Fint Print	Type : request Entry date : 18/10/18 Entered by : Admin Store: OD Test Stor
i	Bern name	Unit	Our stock on hand	Average monthly consump	Months of stock	Calculated quantity	User requested quantity		Comment	
1 NC0071	Amoxycillin 290mg tabs	ea	43,962		2		26,645			
2 NC0082 3 NF0060	Paracetamol 500mg tabs Doxycycline 100mg tab	ea ea	27,328 1,200	9,389 309	2		10,230 37			
4 NF0100	Bandage 15cm x 5m	63	375		3		96			
Sort order								El finalise [Cancel O	s & Nest OE

When the order is then saved, it will automatically generate a corresponding response requisition in

the supplying store. From there, one or more customer invoices can be raised in the supplying store which, when finalised, appear as supplier invoices back in the requesting store in the same way as regular stock transfers.

Programs

See the 4.05. Programs page for information on setting up programs.

Using programs activates a comprehensive system for managing orders and supplies by program. When you click on the **New internal order button**, before the order window opens, another window appears to allow you to select the program and period etc. that the order belongs to:

	New internal order
Order type	
	Program 🧿 General 🔿
Order details	
Program	CONSOMMABLES DE SERVI
Requisition type	Commande Urgente ou Exc ᅌ
Supplier	And Access 1 Consequent
Period	17 SEPT /23 OCT. 2019
	Start date 17/9/19
	End date 23/10/19
	Cancel OK

• **Order type:** Selecting *General* will create a standard, non-program based requisition and none of the Order details section fields will apply. Selecting *Program* will create a program based requisition and you must fill in the details in the **Order details** section.

• Order details section

- **Program:** The program this requisition belongs to. Select one of the programs you have defined and assigned to this store.
- Requisition type: Select one of the types of order you have defined for this program. Normal orders will follow the quantification rules and be limited in the number of orders per period. Emergency orders will not follow quantification rules and will not be limited in the numbers of orders per period but will typically be limited in the numbers of lines that can be entered on them.
- **Supplier:** The supplying store for this store will be selected by default. Other stores can be seleted if required.
- **Period:** The period this requisition is for. Will contain a list of all the periods which are still available for you to enter a requisition for i.e. those for which you have not already entered the maximum number of requisitions. The *Start date* and *End date* fields show

the dates of the start and end of the selected period.

When you click on the **OK** button on this window, the requisition is created for you. The items defined for the program are automatically added to it and the suggested order quantity is calculated for you following the quantification rules.

Note that items belonging to the program will only be added to the order if they are also visible in the supplying store. This is to avoid the situation where you request an item that they don't have visible to them and therefore can never have any stock to supply!

Purchase orders

- This method of ordering stock from another mSupply store is deprecated: Internal Orders (above) is the way to do it.
- Purchase orders are used for Ordering stock from suppliers outside of mSupply

Using a purchase order to order from another store

For the most part, the process is the same as for creating a normal purchase order. There are, however, a few significant differences:

• In the *Name* field of the purchase order, enter the name of the store which will supply your goods.



The names of suppliers which are stores will appear in *RED* in the choice list of suppliers. If the name of the store you select as a supplier is *BLACK*, then you have not chosen another store as a supplier (you will be creating a standard purchase order not an internal requisition), and the instructions in the remainder of this section do not apply.

• The *Internal requisition* label will appear after the name to indicate that this is going to be an internal requisition.

Order n onfirm (Name Virtual store 2			Location	VIR2	: In	ternal requ	Sta	Black blus sg core Genera	
	ne Delete line	es Update EDD Info	Print Pure	6 chase 0	rder Co	m anfirm		Catego	xy none		>
show a		×						ency AUD		ex rate	1
Line	Item code	ltem	Orig.Qty	Pack	Adi, Qiy	Tot. recei	Stock on	On Order	Cust.b/odrs	Price Ext	Re
<											>
	⊂Supplier dis	ount									
¢¢	Percentage		ount	0.0	000		Estin	Estimal hated cost af	ted subtotal ter discount		0.000
	Locked	Auto calc usage	🗌 Final	lize orde	er 🔲	Print long de:	scription	Print m	y signature		
						C	OK & Next		Delete		ж

Enter the purchase order lines as normal and when you're finished, confirm the purchase order (at this point you may be prompted to enter budget and/or category information, depending on your preferences):

2	Edit	Purchase	order											
	Order r	num: 424	Name Virtual store 2				VIR2	Int	ternal requi	sition	Black			
4	onfirm	date 18/0	04/2011 Requested delive	ry 18/04/20	11				-	Sta	itus on			
ľ	Ganari	d Detair A	d Hoc Rems Goods Received	unnier Inwoice	ling	Location						58	ore General	
	Genera	of Decails A		coppier involce:	-l	Location								
				6					Catego	none .		~		
			Update EDD Info	Print Pure	thase O	rder								
	show	al lines	×					Curr	ency AUD	Fore	ex rate	1		
	Line	Item code	ltem					Stock on		Cust.b/odrs		Requeste		<u>_</u>
	1	EFV600	Efavirenz tablet 600mg	20		20	0		60 0	0		18/04/2011		_
	2	Formraw	Formaldehyde solution 20% 5L	150	D	150	U	1/39	0	0	0.00	18/04/2011	Lieneral	
														_
														_
														_ 11
	<													>
	1.000	Supplier d	iscount								Echipone	ed subtotal		0.000
		Percenta		ount	0.0	00				Estin	ated cost afb			0.000
				-										
	_	Locked	Auto calc usage	Final	ize orde	r P	rint long der	cription	Print m	/ signature				
										OK 8. Next		Delete		_
									. L	OK BUINESSE		Delece		<u> </u>
-	_				_	_	_							

Once confirmed, it will no longer be possible to:

- modify the purchase order lines, except for updating the expected data of delivery (EDD).
- delete the purchase order or any of its lines (mSupply will give you a warning if you try).

Processing the order (supplying store)

For versions of mSupply newer than v4.01, confirming the purchase order will create a response requisition in the supplying store (with your store's name in the *Name* field). This allows the supplying store to create multiple customer invoices to supply the order (and hence to better handle partially fulfilled orders). Once each customer invoice has been **finalised**, a goods received note for the purchase order will be created back in the store where you created the purchase order which started this whole process off (called the customer or receiving store).

Handling partially fulfilled orders

If you have unfilled lines on the customer invoice (i.e. red placeholder lines), when you finalise the customer invoice you will be asked if you want to create a new invoice with the unfilled lines. This new invoice retains the link to the purchase order that created the original customer invoice, and can be used to issue further goods to the customer.

Note that you can also create another invoice that is linked to the original purchase order at any time by using the "Duplicate" button on the toolbar of the customer invoice list.

Receiving the goods (requesting store)

Now, back in your store, where you created the purchase order which started this whole process off, you can view the goods received record via the **Suppliers** tab on the Navigator or via the **File > Supplier > Show goods received** menu item (or via the **File > Supplier > Show purchase** orders > Goods received tab)

Edit Purchase	order.						_	
Order num : 424		Name Virts		VIR2	Internal re	quisition	-	Black
onfirm date 18/0	4/2011	Reque	ested delivery 18/04/2011				Store	cn General
General Details A	d Hoc ite	ms Goods P	Received Supplier Invoices Log Loca	tion				
Goods recei		Statu 865 sg	s Supplier reference P0 number: 424	Entry date 18/04/2	2011	Receive of		18/04/2011
				10/04/2	011			
	29 COI	t goods re	ceive					
		Supplier	Virtual store 2		:	Store: Ger	eral	
	Red	eived date	18/04/11	Purchase order :	424	Goods recei	ved ID :	865
	Supplie	r reference	PO number:	Created by :				18/04/11
				Modified by :			Status :	sg
		-	·	*	<u>-</u>			<u>-</u>
	Add fr	om purchase	order Add an un-ordered item	Delete line	Check space	e	Print g	goods receipt
	Line	Location	Item name	Batch	Exp date	Pack Size		Quan
	1	MAN	Formaldehyde solution 20% 5L	SV380			1	150
	2		Efavirenz tablet 600mg	ABC1234	01/01/2012		1	20
<								
					OK & Next	Delete	_	OK
	E Fin	alize		L	OK OLIVEXT	Delete		OK

Notice that on the goods received note the lines from the customer invoice will have been filled in automatically. Process the goods received note in the normal way and note that, as with all other goods received, the goods are not added to your store's stock and available for issue until the goods received note has been finalised and the resulting supplier invoice confirmed. Note that, from mSupply v3.85, the original purchase order lines will only be updated with the stock received when the goods received note has been finalised.

Previous: 6.03. Purchase order categories || Next: 6.05. Multi-store Purchase Orders

