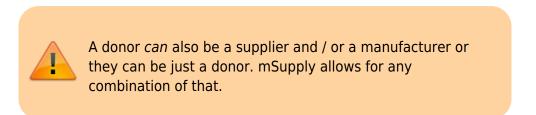
7.07. Managing donors

What / who is a donor?

In mSupply, we have the idea of a '*name*'. A name can be a customer, a supplier, a patient, ... or a donor.

A donor is the organisation that has either paid for, or somehow managed the supply of certain items.



mSupply allows you to specify the donor for each incoming stock line independently of the supplier.

For example, GlobalFund might agree to supply certain malaria medicines, and then contract a supplier to deliver them to you. mSupply allows you to record this accurately, and to track and report on all the stock and transactions relating to those medicines donated by GlobalFund.

Using the donor module

To use the donor module, you must first turn it on:

- Click drop down menu File>Preferences...
- Click the **Invoice 1** tab in the left-hand list
- Check the box Allow tracking of received stock by donor

0 0	Preferences	
General Invoices 1 Invoices 2 Printing Misc Log Patient Medication E-mail Backup	All Invoices Allow editing tax rate & amount on invoices Allow entry of dates on invoices Export invoices to disk when finalizing After deleting lines, redo the numbering Activate budget module	Activate Ad hoc items Round cost, sell price, cash payment and cash receipt Z decimal places
Backup 2 Reminders Web server Moneyworks Drug Interactions Customization Dispensary mode Item Purchase order defaults Purchase order 2 Price This Computer OK and print Logo Quotes	Supplier Invoices ✓ Allow editing margins on supplier invoice lines Hide batch number and expiry date entry ✓ Confirm supplier invoices without asking ✓ Show comparative purchases for supplier invoices ✓ Item margin overrides supplier margin on supplier invoices ✓ Activate supplier payment module Warn if expiry less than 0 days Disallow remove hold status if zero sell price ✓ Sell price changes affect un-finalized customer invoices	 Show inner and outer pack fields Hold invoice by default Allow tracking of received stock by donor
Reports HIS Tender Synchronize		Cancel

Once you have done this you can add donors and track stock by donor.

Adding or Editing Donors

To add or edit a donor you should first bring up the list of donors. Do this from the Navigator:

- Go to the Suppliers tab > Show Suppliers and check the box beside Donors so that the list shows donors rather than suppliers. Click Find. This will bring up a new window showing any donors you have added
- You can edit a donor by double-clicking on it.
- You can add donors using the **New** tool bar at the top of the window. This will bring up a window like this:

			New donor					
General	Arch Foundation Name Code arch Charge to arch March Fou Master ID Master ID	0 9	Contact email web site Phone Fax Status Hold	Price Category	Store: General 2			
	Category Customer Supplier Manufacturer Benchmark Donor	Other none Category 2 none Category 3 none	Category Category Category	y 4 none	Custom 2			
	Main/Billing Address Address 1 Address 2 Address 3 Address 4 Address 5 Post code Country		Postal address		Shipping address			
Delete name)			ОК & I	Next Cancel OK			

• Now add your donor details and click **OK**.

Track a Donor in mSupply

Donors and the Purchase Order

- Create a Purchase Order in one of the usual ways refer Ordering Items From Suppliers.
- With donor tracking turned on, the Donor field will appear in the window see below. The value you enter here will be tracked from this point on through to receipt, stock transfers and dispatch.

ع					Ne	w Pu	chase o	order							×
	Ore	der num:	: 3509	Name									В	lack	
	Con	firm date	00/00/00		Donor				Refe	rence			Status sg		
Rec	uested	d delivery	02/03/2015]									Store: Mu	nda SLM	15
Ge	neral	Details	Ad Hoc items	Goods Received	Supplier Invo	ices Lo	og Locati	ion							
	+			1		=	6	\checkmark							
N	ew line		Delete	Update EDD	Info	Print		nfirm		Categ	ory hone				
st	iow all	lines	•						Curr	ency SBD	▼ For	ex rate	1		
U	ne Ib	em code		ltem	Orig.Qty	Pack	Adj, Qity	Tot. recei	Stock on	On Order	Cust.b/odrs	Price Ext	Expected	Store:	
															^
<														>	~
		Supplier Percenta	discount age	0 Discount amou	unt	0	.00			Es	Estin timated cost	nated subtot after discou		0.0	
		Locked		Auto calc u	sage		 Print 	long descr	iption	Print r	ny signature				
[Final	lize order	r							OK & Next		Delete	0	ĸ]

In the **Donor** field type the first few characters of the donor name or code (or enter the wildcard character '@' in field) and press the **Tab** key on the keyboard. This opens the window below, showing the donor that match what you typed:

● ○ O C	hoose name
-	
New	
Name	Code
Arch Foundation	arch
Double-click a name to ch	oose it
	Cancel Use

- If your donor does not exist, you can add it at this point by clicking on the **New** button see Adding or Editing Donors above.
- Once you have selected your donor, click on the **OK** button and the donor's name will appear in the **Donor** field:

0	e				N	ew Purc	hase orde	r					
	Order num :	87	Name	Central Medic	al Store			c	MS			B	lack
	Confirm date	22/05/2013	Default donor:	Arch Foundat	ion	Reference						Status cn	
Reque	sted delivery	22/05/2013]									Store: Ger	neral
_	_		General Detai		items	Goods	Received	Supplier Invo	pices Log	Location			
New I		ete lines	Update EDD	Info	E Print		√ ≥nfirm		Catego	ary none		:	
show	all lines	\$						Curr	rency VUV	‡ Fo	rex rate	1	
Line	Item code		ltem	Orig.Qty				Stock on	On Order	Cust.b/o	Price Ext	Requeste	Store:
1	40	AMOXYCILLI	N 250mg TAB/CAP	1000000	10	1000000	0	286600	0	0	178,000.000		General
	Supplier	discount								Est	timated subtot	al 178	.000.000
S	Percent	age	0 Discount amo	unt	0.0	000			E	stimated co	st after discou	nt 178	,000.000
	Locked		Auto calc u	sage		Prin	t long descri	ption	Print n	ny signature			
O F	inalize order	- Au	thorise					F	OK & Next		Delete	0	ж

 Add your Item line(s), check your order is correct and click the **Confirm** button to make the order available for Goods Receipt in the normal way - see Ordering Items From Suppliers for more details.

Donors and the Goods Receipt function

Receive goods in the usual way - see Receiving goods (Goods Receipt function). The only difference is that the Donor's name is now present in the Donor field:

Last update: 2019/10/16 17:51

dical Store			Store: Gener	ral ‡
Tender reference :			Goods received I	D: 34
				y: sussol
				-
ht an	_		-	e: 22/05/13
ation				
				s: nw
*	*	-	<u>_</u>	
dd an un-ordered item	Delete line Che	eck space Prin	nt goods receipt	
ltem name				Quan
IN 250mg TAB/CAP	ABC1234	30/09/2018	10	100000
	Tender reference : ation dd an un-ordered item	Tender reference : ation dd an un-ordered item Delete line Che Item name Batch	Tender reference : ation ation dd an un-ordered item Delete line Check space Prin Item name Batch Exp date	Tender reference : Goods received I Created b Modified b Entry dat ation Purchase order Supplier invoic Statu dd an un-ordered item Delete line Check space Print goods receipt Item name Batch Exp date Pack Size

Donors and the Supplier Invoice

✓ Finalize

 Clicking Finalise on the Goods Receipt generates the Supplier Invoice in the usual way (see Receiving Goods - a Supplier Invoice). Note that you can see the donor identified in the Purchase Order in the Default donor field:

OK & Next

Delete

OK

25/06/28 01:21		7/10				7.06.	Managing dor	
00		Sup	oplier invoic	2				
Name Central Medical Store Their ref CMS Comment goods received ID : 34	Ţ	Cate	Entry date : Confirm date : gory None	22/05/2013 00/00/00		Colour : Black Invoice number : 2,229 Status : nw Goods receive ID : 34 Purchase Order ID : 87 Entered by : sussol Store : General		
New line Delete line			Item Summa	ndation	rice			
Lo Item Name 1 TAB AMOXYCILLIN 250mg TAB/CAP 4 4 5 4 6 4 7 4	Qty 100000		Batch Exp ABC1234 30/09	iry Cost Pric (2018 1.780)		Price extension	n 60.00000	
Other charges Item(s): Amount: Hold Export batch: 0	0.00000					0 % tax:	78,000.00000 0.00000 78,000.00000	

Default donor for each stock line

- Each stock line on a Supplier Invoice will inherit the **Default donor** from the Supplier Invoice.
- The **Default donor** can be edited.

000		and the second	S	upplier i	invoice		Marine and	
Comment	t Laboratories (singapore PTE.LTD SNG102		Default	Confirm ategory N Donor: U		Colour : Black Invoice number : 0 Status : nw Goods receive ID : 0 rchase Order ID : 0 Entered by : Sussol Store : General		
Lo	Genera Item Name	Qty	Pack	Batch	Summary by Expiry	Batch Price	Sell Price	Price extension
S 🛛 🗸	Other charges Item(s): Amount: 0.000	000					Subtotal: 0 % tax: Total:	0.00000 0.00 0.00000
Hold Finalize	Export batch: 0 Margin: 0.00					OK & Next	Dele	tte OK 🛛 🗳

Changing the donor for a particular supplier invoice line

• There may be circumstances when delivered stock may be from a mix of donated and nondonated, or from different donors. You can change the donor for any stock line on a supplier invoice when editing the details of the stock line (double-click on the stock line).

lt a se	Sensivity disc Do	and the second line				
item	Sensivity disc Do	xycyclin	le		_	
Quantity	1			7	7/3310	New iten
Pack size	1	Cart/5				_
Total quantity:	1				Location	
Batch	1091060			Volume	per pack	0 m3 S
Expiry	30/9/14		Adjusted local cost (USD)	% Margin	Sell price	
nvoice line unit cost (USD)	142.38000]	142.38000	0.00	142.38000	
			D	onor UNFPA		
				Cancel	ок	OK & Next

If you change the **Default donor**, you will be presented with the following options:

• • •	Donor update confirm
	red or changed a donor. How do you want to invoice line(s) ?
Choose one of	f the options below
🗿 Do no	othing
Upda	te existing donor lines with this donor
Assig	n this donor to the lines with no donor
Assig	n this donor to all lines
	Apply

- "Do nothing": The change will have no effect on existing invoice line(s).
- "Update existing donor lines with this donor": existing donor lines will be updated to match the newly selected donor.
- "Assign this donor to the lines with no donor": lines with no donor selected will be updated with the newly selected donor.
- "Assign this donor to all lines": all lines will be updated with the newly selected donor.

Donors and the Customer Invoice

Customer Invoices, including stock transfers for donated goods are created in the usual way - refer Issuing Goods to a Customer (Customer Invoices).

• They key thing to note is that when selecting from the stock lines to add to the Customer Invoice, the donated stock lines can be distinguished from the other stock lines by the donor name in the **Donor** column - see below:

							edit line						
Item	AMOXY	CILLIN 25	mg TAB/CA	P					40)			
Line		5				Item	category : 6.2	.1 Beta Laci	tam Antibio	tic:			
Quan		50 of 10	0000										
Pack		10 ea	I	Bulk/Out	ter pa	ack size	0						
						(Re-lookup	Sell Price]				
L	Issue	Available	Tot in st	Pack	Н	Batch	Expdate	Supplier	Donor	Location	Cost Price	Sell price	Sta
1	0	0	2700	1		ANTUV00	30/06/2014	CMS		TAB	1.86000	1.86000	_
2	0	0	2400	1		ANTUV00	30/06/2014	CMS		TAB	1.86000	1.86000	
3	0	160000	165000	1			30/06/2014	CMS		TAB	1.86000	1.86000	
4	0		116500	1			30/04/201!	CMS		TAB		1.86000	
5	50	100000	100000	10		ABC1234	30/09/2018	CMS	arch	TAB	1.78000	1.78000	
Abbreviati Abbreviati Expan directi	ions ded	antity avail	able 127	5500									•
								Car	ncel	ОК	0	K & Next	
	mSupply will still suggest a stock line according to its selection criteria (primarily, FEFO). You will need to manually select the donated stock line if it is not the first expiring!												

Reporting

Obviously, one of the points of entering all this donor information is to be able to report on it. When the donor tracking preference has been turned on, many of the stock based report filters in mSupply will have an additional donor filter added to them. Simply enter the donor filter settings you need, as appropriate, to filter the reports accordingly.

Previous: 8.06 Custom stock fields || Next: 9. Issuing Goods

