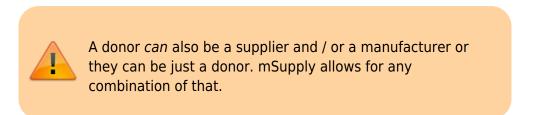
7.06. Managing donors

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

1	0 0	Preferences	
	General Invoices 1 Invoices 2 Printing Misc Log Patient Medication E-mail Backup 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 2 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 ✓ 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.

ormal		Fuzzy	4	
Name filter				
Name	~ cont	tains v		
and	V District	✓ is		٩
and	✓ Custome	er group is Don	't Care	~
Search				
⊖ All na	mes C) Manufacturers		
Selec	tion 🧿	Donors		
O Custo	mers 🔽	Exclude patient	5	
O Suppl	ers			
Exclude hidde	n names			

• Click **Find**. This will bring up a new window showing any donors that have been added to

mSupply in your system

- 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 🗇	Contact email web site Phone Fax Status Hold	Price Category	Store: General : Currency VUV : Supplier details Margin 0 Freight factor 1 Printing Print invoices alphabetically
	Category Customer Supplier Manufacturer Benchmark Donor	Other none Category 2 none Category 3 none	Category Category Category Category Fla	5 none + 6 none +	Custom 1 Custom 2 Custom 3 Comment
	Main/Billing Address Address 1 Address 2 Address 3 Address 4 Address 5 Post code Country		Postal address		Shipping address
Delete name				OK & N	lext 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.

1				Ne	w Pu	chase o	order							×
	Order num	: 3509	Name									В	ack	
	Confirm dat	e 00/00/00		Donor				Refe	rence			Status sg		
Req	uested deliver	y: 02/03/2015										Store: Mu	nda SLM	15
Ge	neral Details	Ad Hoc items	Goods Received S	upplier Invo	ices L	g Locat	ion							
	+		0		=	6	\checkmark							
		Delete	Update EDD	Info	Print		nfirm		Categ	ory hone				
sh	ow all lines	-						Curr	ency SBD	▼ For	ex rate	1		
Lir	ne Item code		ltem	Orig.Qty	Pack	Adi, Qiy	Tot. recei	Stock on	On Order	Cust.b/odrs	Price Ext	Expected	Store:	
														\sim
<													>	~
3		r discount tage	0 Discount amou	nt	0	.00			Es	Estin timated cost	nated subtot after discou		0.0	
	Locke	d	Auto calc us	age		✓ Print	long descri	ption	Print n	ny signature				
	Finalize orde	er							OK & Next		Delete	0	K	1

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 Choos	e name
·	
New	
Name	Code
Arch Foundation	arch
Double-click a name to choose i	t
	Cancel Use
	11.

- 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	#				N	ew Purc	hase orde	er					
	Order num :	87	Name	Central Med	ical Store	1		c	MS			B	lack
	Confirm date	22/05/2013	Default donor:	Arch Founda	tion			Reference				Status cn	
leque	sted delivery	22/05/2013										Store: Ge	neral
			General Deta	ils 🕴 Ad Ho	c items	Goods	Received	Supplier Invo	oices Log	Location]		
÷		-	0	1	—		\checkmark			_			
New I	line Del	ete lines	Update EDD	Info	Print	Co	onfirm		Catego	ory none		:	
show	all lines	\$						Curr	rency VUV	‡ Fo	rex rate	1	
ine	Item code		ltem	Orig.Qt	Pack	Adj. Qty	Tot. rece	Stock on	On Order	Cust.b/o	Price Ext	Requeste	Store:
1	40	AMOXYCILLI	N 250mg TAB/CAP	100000	0 10	1000000	0	286600	0	0	178,000.000		General
_													
	Supplier	discours											_
S	Percenta		0 Discount amo	unt	0.0	000			E		timated subtot st after discou		3,000.000(3,000.000(
	Locked		Auto calc u	isage		Prin	t long descri	ption	Print r	ny signature			
□ F	inalize order	- Au	thorise						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: 2023/06/22 00:01

0	0		New g	goods rece	eipt			
	Supplier	Central Medical Store				Store:	General	\$
Re	eceived date	22/05/13 Tender reference :				Goods re-	ceived ID	: 34
Suppli	er reference						reated by	
							dified by ntry date	: 22/05/13
De	fault donor	Arch Foundation					se order	
						Supplie	r invoice	
	-	•				4	Status	: nw
Add fr	rom purchase	e order Add an un-ordered item			eck space Prin	nt goods receipt	t	
Line	Location							
1	Location	ltem name	_	Batch	Exp date	Pack Size		Quan
	TAB	Item name AMOXYCILLIN 250mg TAB/CAP		Batch ABC1234	-		10	Quan 100000
-					-			
-					-			
					-			
					-			
					-			
					-			
					-			

• 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

Finalize

Donors and the supplier invoice

025/06/28 01:21		7/11				7.06. Managing d
00		Supplier	invoice			
Name Central Medical Store Their ref CMS Comment goods received ID : 34	Ţ		ry date : 22/0 m date : 00/0			Colour : Black woice number : 2,229 Status : nw ods receive ID : 34
🔹 📼		Category		;	Purc	hase Order ID : 87
New line Delete line	Def	ault Donor: 4	Arch Foundatio	n		Entered by : sussol Store : General
60	neral Summ	ary by Item	Summary by	Batch Price		
Lo Item Name			Expiry			Price extension
1 TAB AMOXYCILLIN 250mg TAB/CAP	100000	10 ABC123	4 30/09/2018	1.78000	1.78000	178,000.00000
Other charges						
S 💽 🖌 Item(s):	00000]			Subtotal: 178,000.00000 0 % tax: 0.00000 Total: 178,000.00000
Hold Export batch: 0				OK & Next	Delete	е ОК С

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.

00	0		and states	S	upplier	invoice	-		
(Name Their re Commen 	t Delete line	_ C	Default	Confir ategory Donor: L		\$		Colour : Black Invoice number : 0 Status : nw Goods receive ID : 0 urchase Order ID : 0 Entered by : Sussol Store : General
	Lo	Genera	Qty	Pack	Batch	Summary by Expiry	Batch Price	Sell Price	Price extension
5		Other charges Item(s): Amount: 0.000	00					Subtotal: 0 % tax: Total:	0.00000 0.00 0.00000
-	old inalize	Export batch: 0 Margin: 0.00					OK & Next	Del	ete 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 ne	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			and the second			
Item	AMOXY	CILLIN 250	mg TAB/CA	P					40)			
Line		5				ltem	category : 6.2	.1 Beta Laci	tam Antibio	tic:			
Quan		50 of 10	0000										
Pack	_	10 ea		ault (Ou	• • • • •	ack size	0						
rack		io ea	'	suik/Ou	ter p	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	116500	1		67712043	30/04/201	CMS		TAB	1.86000	1.86000	
5	50	100000	100000	10		ABC1234	30/09/201	CMS	arch	TAB	1.78000	1.78000	
reviat brevia Expan	Total qua tions tion	quantity is: antity avail		500 6500									•
reviat brevia	Total qua tions tion												•
reviat brevia Expan	Total qua tions tion							Car	ncel	ОК		OK & Next	

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.

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

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