

# 3.06. Customers and suppliers

## Adding a customer or supplier

In this section of the tutorial, we will add a new supplier and a new customer.

### Adding a supplier

From the top of the mSupply navigator screen, click on the 2nd of the large icons, *Suppliers*, and then click on *New Supplier* from the navigator panel. You will see this window:

General

Invoices

Backorders

Quotes

Notes

Contacts

Group

Purchase orders

Web log-in

Item lists

Stock history

Store

Photo

International Dispensary Association

Name

Code IDA

Charge to IDA

Name International Dispensary Association

Master ID 0

Master name

Contact

email

web site

Phone

Fax

Status

Hold

Preferred

Price Category

A

Store: CMS Store

Currency EUR

Supplier details

Margin 0

Freight factor 1

Printing

Print invoices alphabetically

Category

Customer

Supplier

Manufacturer

Benchmark

Other

Category 1 none

Category 2 none

Category 3 none

Category 4 none

Category 5 none

Category 6 none

Flag

Custom 1

Custom 2

Custom 3

Comment

Main/Billing Address

Address 1 IDA

Address 2

Address 3

Address 4

Address 5

Post code

Country

Postal address

Shipping address

Delete name

OK & Next

Cancel

OK

You can enter the details for your new supplier in this window.

Field	What to do....
Name	
Code	Enter "Acme" to identify the Supplier (Acme Pharmaceuticals). You need to choose a unique code for each name. Try to choose a logical system, as the code is used to look up the Supplier (or Customer) when you are entering invoice data. (for example, try to start the code with at least the first three letters of the Supplier name)

Field	What to do....
Charge to	Enter "Acme" again. This field is only used when exporting data to an accounting program - this code must match the code you use for the supplier in your accounting program.
Name	Enter "Acme Pharmaceuticals" - the name of our supplier.
Master ID	Ignore for now
<b>Contact</b>	
Email, Web site etc.	Fill in with the appropriate details
<b>Status</b>	
Hold checkbox	If this box is checked for supplier or customer, that particular supplier or customer can neither supply nor be supplied with items.
Preferred checkbox	Leave unchecked
<b>Price Category</b>	
Price Category	This applies to customers. It is possible to assign multiple sell prices to customers. Leave it set to "A".
<b>Currency</b>	
Currency	The field is automatically filled in with "Nrs" (=Nepali rupees - the default currency in our example data). This is the currency that this supplier will use to bill us.
<b>Supplier details</b>	
Margin	Enter "10". Items purchased from this supplier will have a 10% margin added to calculate the selling price.
Freight factor	Enter "1". Acme Pharmaceuticals does not charge any freight to us. Their prices are "CIF"(Cost, Insurance & Freight to named port). This field is only used for comparing quotations from suppliers - it is not used for actual invoices.
<b>Printing</b>	
Print invoices	Ignore for now
<b>Category</b>	
Customer check box	Leave this box unchecked, as we are entering a new Supplier.
Supplier check box	As you chose "new supplier" this box is already checked.
Manufacturer	Leave unchecked
Benchmark	Leave unchecked
<b>Other</b>	
Category 1-6	Ignore for now
Custom 1-3	Ignore for now
Flag	Ignore for now
Comment	You can enter a brief note here (Ignore it for now)
<b>Addresses</b>	
Address, Main, Postal and Shipping address.	You can complete these with appropriate values.

If you are satisfied with the details, click *OK*. You will be returned to the mSupply navigator screen.

## Adding a customer

From the top of the mSupply navigator screen, click on the 1st of the large icons, *Customers*, and then click on *New Customer* from the navigator panel. You will be presented with a window similar to the *New Supplier* one above to enter the customer's details.

Fill in the fields as follows:

Field	What to do
<b>Name</b>	
Code	Enter "bluec"
Charge to	Enter "bluec"
Name	Enter "Blue Cross Hospital" - the name of our customer.
Master ID	Ignore for now
<b>Contact</b>	
email, web site, etc.	You can complete these with appropriate values.
<b>Status</b>	
Hold checkbox	If this box is checked for supplier or customer, that particular supplier or customer can neither supply nor be supplied with items.
<b>Price Category</b>	
Price Category	This applies to customers. It is possible to assign multiple sell prices to customers. Leave it set to "A".
<b>Category</b>	
Customer check box	As you chose "new customer" this box is already checked.
Supplier check box	Leave this box unchecked, as we are not entering a new Supplier.
Manufacturer, Benchmark check boxes	Leave these unchecked too
<b>Other</b>	
Category 1-6	Ignore for now
Custom 1-3	Ignore for now
Flag	Ignore for now
Comment	You can enter a brief note here (Ignore it for now)
Print invoices	Ignore for now
<b>Addresses</b>	
Address, Main, Postal and Shipping address.	You can complete these with appropriate values.

Click the *OK* button to save the details and exit the window.

## Editing a customer or supplier

Let's now look up Acme Pharmaceuticals.

- Choose *Show suppliers* from the navigator's *Supplier* panel. You are presented with a window to enter as much of the supplier's name or code as you know.

Normal ☐ Fuzzy

Name filter

Name  contains

and  Category 1  is Don't care

and  Customer group  is Don't care

Search...

☐ All names ☐ Manufacturers

☐ Selection ☐ Donors

☐ Customers ☒ Exclude patients

☒ Suppliers

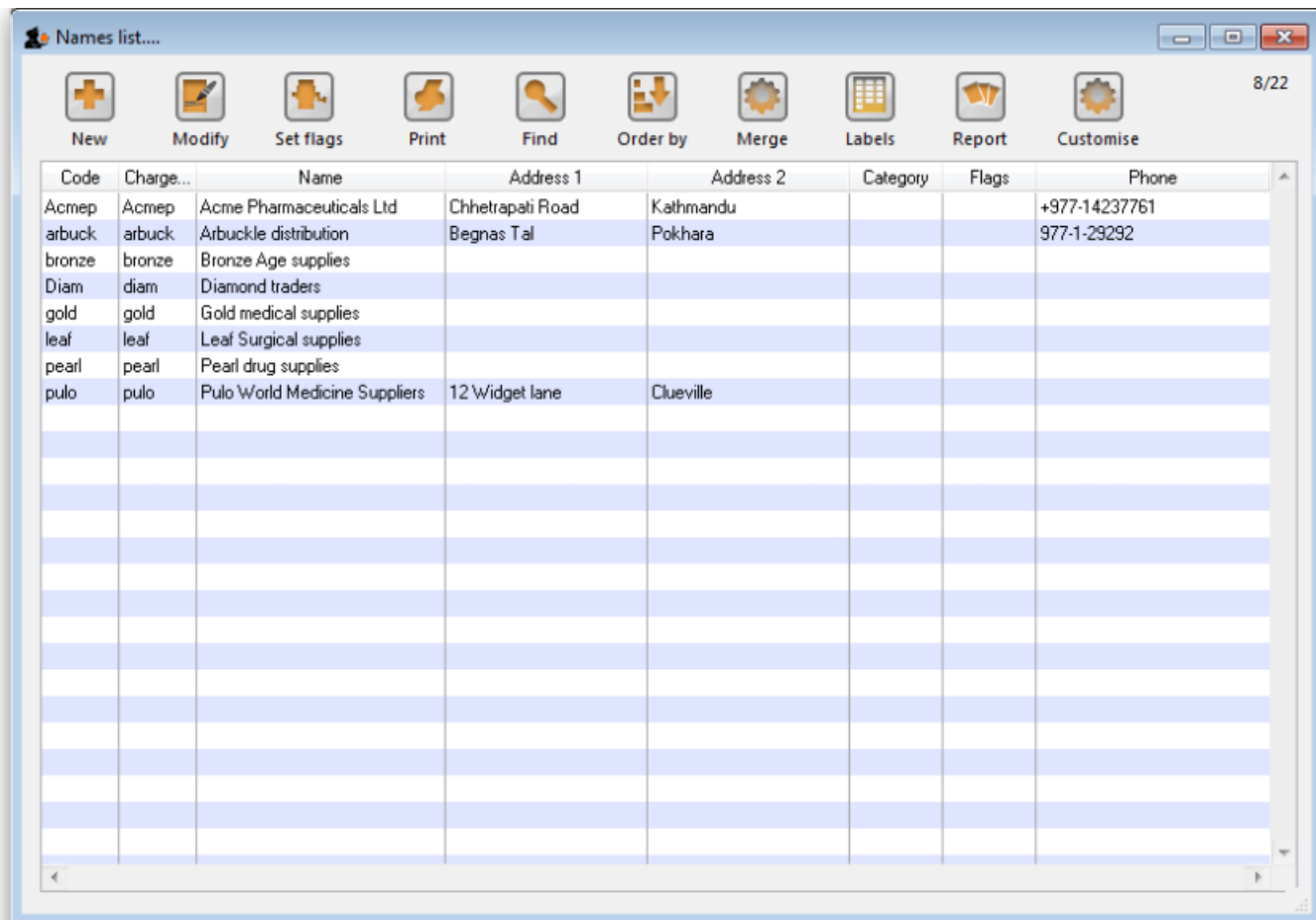
☒ Exclude hidden names

Complex Find Cancel Find




For information on the Normal - Fuzzy slider, see [Editing a Customer, Supplier or Manufacturer](#)

For this tutorial, just click the *Find* button. You will get a list of all suppliers.



- Double-click “Acme Pharmaceuticals” entry in the list. You will be shown the same window the same as you used to add Acme Pharmaceuticals as a new supplier.

 Edit customer/supplier

General

Invoices

Backorders

Quotes

Notes

Contacts

Emails

Group

Purchase orders

Web log-in

Favourites

Stock history

Store

Acme Pharmaceuticals Ltd

Store: General

Name

Code

Acme

Charge to


Acme

Name

Acme Pharmaceuticals Ltd

Master ID

0



Master name

Category

Customer

☐

Supplier

☒

Manufacturer

☐

Benchmark

☐

Status

Hold

☐

Preferred

☐


Price Category

A

Other

Category

none



Analysis

Category 2

Comment

Category 3

Print invoices

☐

Flag

Supplier details

Currency

Nrs

Margin

10

Freight factor

2

Address

Main or Billing address

Address1

Chhetrapati Road

Address2

Kathmandu

Country

Nepal

Postal address

PO Box XYZ

Kathmandu

Lat

27.7117

Long

85.3068

View on Map

Delete name

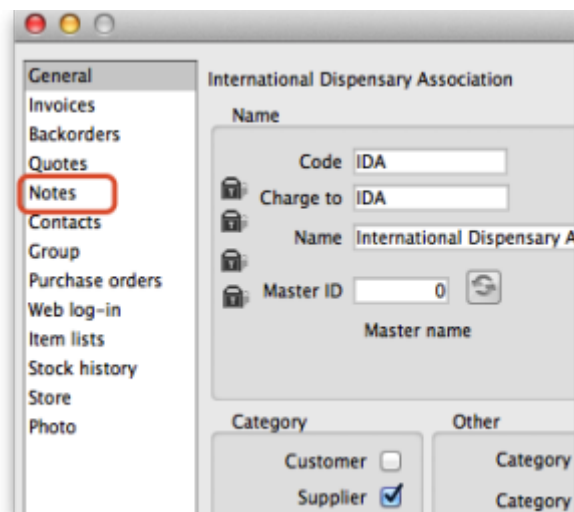
OK & Next

Cancel

OK

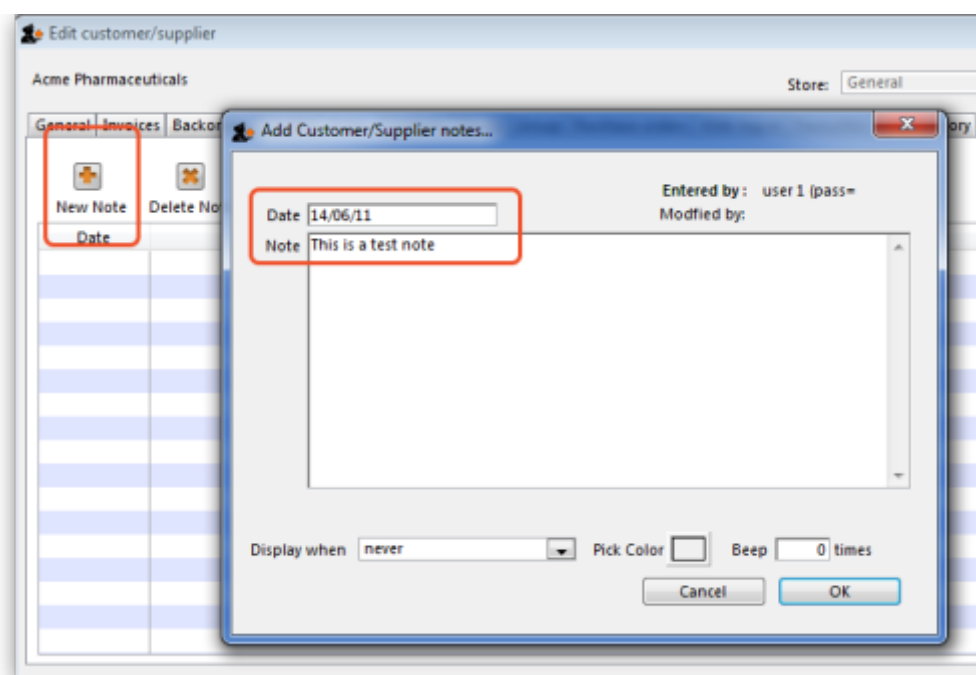
- Note the window has Tabs down the left side in the sidebar: General, Invoices, Backorders, Quotes, Notes, etc. Let's add a note for Acme pharmaceuticals:

- Click on the *Notes* tab.



The screenshot shows a software window titled 'International Dispensary Association'. On the left is a vertical menu with tabs: General, Invoices, Backorders, Quotes, Notes (highlighted with a red rectangle), Contacts, Group, Purchase orders, Web log-in, Item lists, Stock history, Store, and Photo. The main area contains form fields: 'Name' (with sub-fields 'Code' containing 'IDA' and 'Charge to' containing 'IDA'), 'Name' containing 'International Dispensary A', 'Master ID' containing '0', and 'Master name'. At the bottom, there are checkboxes for 'Customer' (unchecked) and 'Supplier' (checked), and two 'Category' labels.

- Click on the *New Note* button. Today's date is entered automatically and highlighted. Click inside the Note Entry field.
- Enter *This is a test note* then click the *OK* button.



The screenshot shows a dialog box titled 'Add Customer/Supplier notes...' overlaid on a window titled 'Edit customer/supplier' for 'Acme Pharmaceuticals'. The dialog has a 'Date' field containing '14/06/11' and a 'Note' text area containing 'This is a test note', both highlighted with red rectangles. It also shows 'Entered by: user 1 (pass=)' and 'Modified by:'. At the bottom, there are options for 'Display when' (set to 'never'), 'Pick Color' (with a color picker icon), and 'Beep' (set to '0 times'). 'Cancel' and 'OK' buttons are at the bottom right.

- The first line of your note text will appear in the list of notes.
- Click *OK* to exit viewing/editing the Acme Pharmaceutical supplier, then click *OK* again to exit the list of suppliers.

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