The tutorial like no other

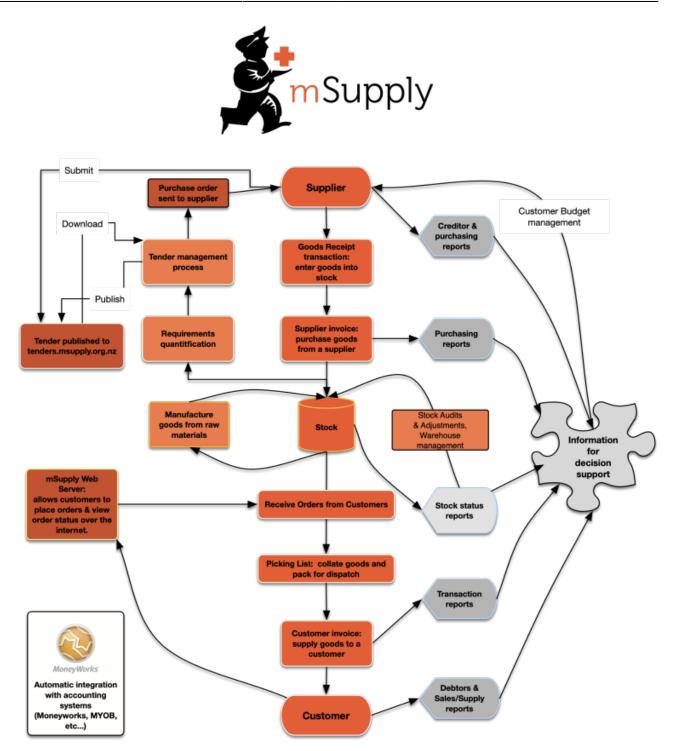
If some of the terms used below are not clear, please see Conventions used in this user guide.

Only mSupply®'s basic features are covered in the Tutorial; its many enhanced features are covered in depth in appropriate chapters in the User Guide.

mSupply Explained

This chart shows the common steps in most pharmaceutical supply processes. (Of course, the manufacturing step only applies to manufacturers!)

mSupply work flow diagram



The two most common transaction types in mSupply® are the **supplier invoice (si)** and the **customer invoice (ci)**. These transactions record stock purchases from suppliers, and stock supplies to customers. mSupply® records a full audit trail by only allowing stock adjustments by way of a transaction. Therefore, given an opening balance of stock for the year, mSupply® can show a series of transactions that result in the recorded closing stock.

Of course, there is much more to it than that, but these two transactions are the core of the system.

Note that mSupply® has dozens of preference settings (**File>Preferences**) which change the behaviour of many aspects of the software. If you have customised Preferences from their default settings, some aspects of this tutorial may not be as stated below. To work through the tutorial, we recommend you start with a fresh copy of the example data to ensure the Preferences are set

correctly.

Before starting the tutorial, you will need to have installed mSupply®, and opened the example database. If you haven't done so, see Installation

mSupply® runs best with a screen resolution of 1024 or 768 or greater. If you have your screen set to 950 x 850 or lower, some windows will not fit on the screen. To change screen resolution:

- Windows: Right click anywhere on the desktop, select **Properties** > **Settings** , and make the necessary changes.
- Macintosh: Choose **Apple** > **System Preferences...** then click on the **Displays** icon and set a new resolution

Opening the example data file

You will have two icons on your desktop - double-click the **mSupply** icon.

If you are opening mSupply® for the first time, the program should automatically open the example data file.

The full path to the data file is displayed, along with other useful information by choosing **Menu** >**Help**>**About mSupply**:

1 About mSupply		.
mSupply version		3
You are using version 3.50 Release number 0 Release date 17/05/2016	Version available for download U #14-18 Release number U	
Path to data file : C:\mSupply350\Database\mSupply.4DD	Click to check online	2
Path to log file : Log file not used		
Path to structure file : C:\mSupply350\mSupply.exe		
Records	Sustainable Solutions retains the rights to this software.	
0 records in abbreviation	Commercial use or modification of this software only allowed v	with
3 records in account	authorization of Sustainable Solutions (NZ) Ltd. email: info&msupply.org.nz	
0 records in Admitted_from 0 records in asset	Copyright Sustainable Solutions (NZ) Ltd.	
0 records in asset 0 records in asset_condition		
0 records in asset_location		
0 records in asset_status		
0 records in asset_type		
0 records in backorder	Structure update : 160517t1423	
0 records in bill_of_material 🗸 🗸	Structure opulate : 10031712425	OK

If you have already been using mSupply® and have another data file open, but would like to open the example data file for use with this tutorial, then you can use the mSupply® menu **File > Open data file...** to open the example data file. In Windows, by default the example data folder is stored inside **c:/mSupply/database/**; navigate to the location and open the data file.

Organise 👻 New folder					800	• 🔟 🔞
^	Name	Date modified	Туре	Size		
F This PC	🕌 Logs	23/03/2015 9:37 a	File folder			
P Admin (theoffice	Preferences	5/03/2015 12:12 a	File folder			
P admin@cityside.	Resources	18/02/2015 11:05 a	File folder			
Cityside (theoffic	mSupply.4DD	23/03/2015 9:37 a	4DD File	4,801 KB		
P craig@sussol.net	mSupply1.4DD	19/03/2015 11:29 a	4DD File	3,009 KB		
P Curators (theoffi- Desktop	mSupply2.4DD	19/03/2015 1:39 p	4DD File	3,009 KB		
Documents						
Downloads						
jeannie (theoffice)						
Music						
E Pictures						
Videos						
Local Disk (C:)						
🗣 Network 🗸 🗸						
File nam	ne			v 4	ID Data File (*.4dd;*.	.data) 🗸
				r	Onen	Cancel
				L	<u>O</u> pen	Cancel

If you have chosen a different location from the one suggested by the installer, the example folder will be in your chosen location.

A password entry window is presented as mSupply® opens up a data file. The message panel informs the user that the example data base is in use.

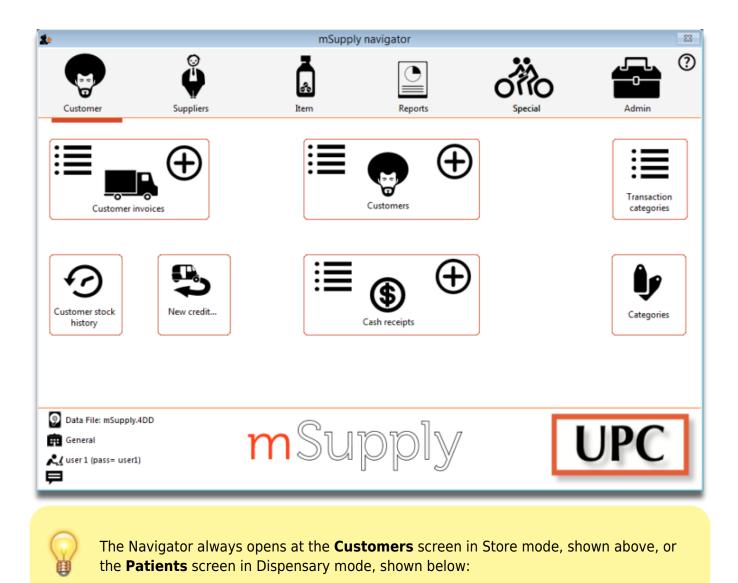
1 -	Log-in – 🗆 🗙
Search users	
1. Click on your name in the list	2. Enter your password
user 1 (pass= user1)	
user2 user3	
users.	3. Choose store if available
	General 🔻
	4. Choose login mode if available
	Store 🔻
	5. Check any messages
	Warning: example data file loaded. Log in, then use File > Open data file if you want to connect to a different data file. This data file is C:\mSupply\Database\mSupply.4DD
	6. Click the OK button to proceed
	·
×	Quit OK

The **"User 1" (pass= "user1")** entry should be highlighted, but if it is not, it should be selected. Enter "user1" (without the quotes) at **2.Enter your password**. The **Choose store** drop-down list will display **General**, and the **Choose login mode** ... dropdown list will display **Store** - these should not be changed. Click the **OK** button. After you have logged on, the Navigator screen appears:

The Navigator

Overview

The mSupply® Navigator provides access to most of the functions you will be using regularly in mSupply®. You will learn that many of these functions may also be opened with shortcut key sequences from the various **Menu items**, and once you have gained some experience, you may find it quicker to use the shortcuts.



Last update: 2019/07/04 00:18

tutorial:full_tutorial https://docs.msupply.org.nz/tutorial:full_tutorial?rev=1562199505

1.		mSupply	/ navigator			8
Patients	Suppliers	Item	Reports	Special	Admin	?
	Prescriptions		Patients G	•	Transaction categories	
 Data File: mSup Data File: mSup Supervisor- All : Au user 1 (pass= u 	pply.4DD stores ser1)	nSu	pply		UPC]

Displayed along the top of the screen are four items of information:

- the **mode** selected at logon (store or dispensary),
- the store in which you are working for most users, "General",
- the active **data file**,
- the **user** currently logged on.

Immediately below this, there are six large icons, **Customers** or **Patients, Suppliers Admin** ." Click on the icon appropriate to the task you are performing, and you will be presented with a panel displaying annotated icons listing the available functions and procedures; these are in turn selected either by clicking on the icon of your choice with the mouse, or by advancing through the icons with the right or left arrow keys and pressing the **Enter** key. You will be using the **Items** panel of the Navigator in the next step in the tutorial, and as the same procedures are common to all panels, you will quickly become familiar with them.

The bottom right area of the Navigator screen is available for displaying your own logo - the logo of "Acme Medical Supplies" is displayed in our example. The placing of your logo is performed by choosing **File > Preferences > Logo**. You can also read how to do it here.

Creating and viewing items

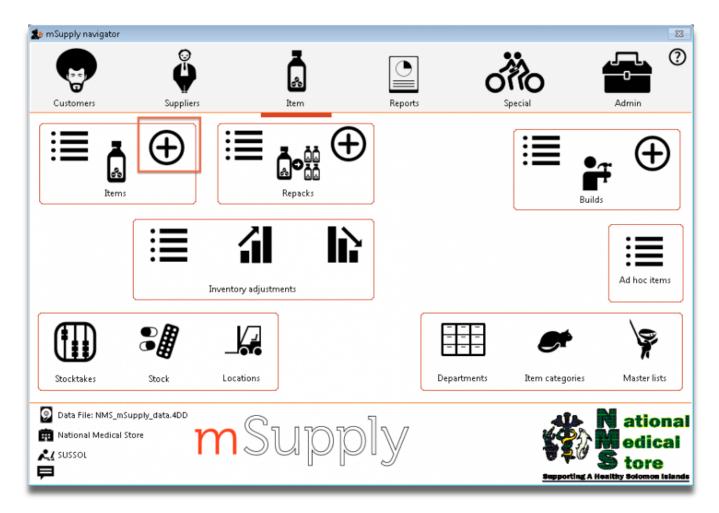
Creating a new item

For this section of the tutorial, we are going to add two new items to our mSupply® database. From

the Navigator's opening screen, click on **Item**, the 3rd of the large icons near the top of the screen



and the following screen appears:



- Click on the **New item** icon
- You are presented with a window with a number of fields to enter:

2 •	Add item	-	×
Type Item code Item name	normal		
Units Price list	None ATC Category		
Shelf location Preferred pack size	DDD value 1		
Category Normal stock	None DDD factor 1 Weight 1		
Critical stock	Non stock item		
Essential drug	Cancel OK & Next	OK	

Below is a list of fields and the text to be entered into each field. Use the Tab key to advance from field to field or, using the mouse, click on the field you want to edit.

Type: The default entry **normal** is shown in the drop-down list, and should not be changed.

Item code: Enter amo500c then press the Tab key to advance to the next field.

Item name: Enter Amoxycillin 500mg tab/cap then press the Tab key to advance to the next field

Continue to use the *Tab* key for the rest of the tutorial when you need to advance to the next field.

Units: "None" is displayed by default. The options are: *unit*, *ea* (for each), *gm* and *ml*.

Price list: Click in the box so a check appears in it. This means that when we export a price list, the price for this item will be included.

Shelf location: Enter **a3.** Amoxycillin is stored on shelf 3 in the "a" section of our imaginary store. Note that "A" is interpreted differently from "a", so it is recommended to be consistent and use either all upper case or all lower case letters for entering shelf locations.

Preferred pack size: Enter **100**. This means we want a 100 unit pack to be our standard for comparing prices of this item.

Category: If a list of categories has been defined, this field allows the item which is being added to be placed in its appropriate category.

Normal stock, Critical stock, Essential drug, ATC category, DDD value, DDD factor, Weight, Non stock item, Default customer: For this tutorial, ignore these fields and leave them blank. Click the **OK & Next** button to add this item to mSupply®. The window's fields will clear allowing you to add a further item.



If you have no more items to add, click the *OK* button to add only the item just added and exit. If you accidentally click *OK* & *Next* and then want to exit, just click the *Cancel* button. The Amoxycillin 500mg tab/cap would still be entered, as it was saved when you pressed the *OK* & *Next* button.

Proceed to add a further item with the following details:

Note that if you make a mistake, you can click in a field and edit the value.

Field	Enter
ltem code	"amo125s"
ltem name	"Amoxycillin 125mg/5ml syrup"
Units	"mL"
Price list	check the check box.
Shelf location	enter "a7".
Preferred pack size	enter "60".

Click *OK* now that you have added the item, then click *Cancel* to exit the window.

Congratulations! You have now added 2 items to our example data file. Let's go and see how to find them.

Viewing item details

Click on **Show items** from the Navigator's Item screen.

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You will be presented with a window to find items:

Item name	starts with		
and	category is		9
and	VEN category is	Don't Care	0
and	Oepartment is	Don't care	0
Rando Exclude hidden		s from returned list	
		ancel	Find

- Type "a" into the text entry area, then click the *Find* button.
- A list of all the items whose name or code starts with "a" is shown.

					Item	ist				
New item	Report	Set values	Find	Order by	Print	Modify	Duplicate	Customise		5/440
Item Code	Kepon	Item na				Stock on I		Customise	f la se	3/410
aci200t	Aciclo	vir 200mg tab	me	Default p	100	Stock on I	nand 50	00	Flags	
lb400t		dazole tab 400m	0		100			00		
mo125tab		cillin 125mg Tat	-		100			28		
imo250t		icillin 250mg tab			100		1195			
amo500t		cillin 500mg tab			100		80			
	_									

- We will choose the Amoxycillin 250mg tabs/caps an item that was already in the example data file. To choose the item, double-click anywhere on its line in the window.
- You will now be presented with a window that displays a lot of information about "Amoxycillin 250mg tab/caps". From this window you can see stock on hand, view and edit supplier quotations, view usage for this item for the last 24 months, view backorders, view, add and edit notes for this item. Phew!

neral sc	ltem name	Amoxicillin 250	mg tab/cap		Store: General 0
ige	D Item code	amo250t		Pricing	
ck	General			De	fault margin 0
lger otes :korders	Departmen	s ea c		Default sell price of prefer Price editable v	
es oncile		6.3.1 Beta Lactan		Full description	
of materials	Category 2	None	٥		
chase Orders der options	Category 3	None	0		
spensing	Interaction group	None	•		
ug registration	Item flag			VEN Category	Stock category
oorting	Catalogue code	the second se		Not assigned	Normal stock
g quisitions	Catalogue cout		ot issue	Vital	Critical stock
ores		Issue in bui	Ids only	Essential	On essential drug list 🥑
	All	ow pack to one con	nversion 🔽	Necessary	Custom fields
	Conve	rt pack to 1 when n	eceiving		user_field_1
	Chalf Is and and				user_field_2 06.2.1
	Shelf locations	Nees	Outer pack siz		user_field_3
	Shelf location				user_field_5 0.00
	Bulk shelf location	None	Outer pack volum	e 0 m3	user_field_6 0
	Preferred pack size	100	Weight per pac	k 0 kg	
	Volume per pack	0 m	13		user_field_4
	Restricted to :	None	0		user_field_7

- At this stage, we only want to know how to view the information. For an explanation of all the information displayed see Item Edit General Options
- When you have finished viewing the information, click the *OK* button to return to the list of items.
- If you want to view a different item, you can double-click its line. Otherwise click the X button in the top right corner (on Windows) or the top left corner (on a Mac) to exit to the **Navigator**.

Customers, Suppliers, and Contacts

Adding a Customer or Supplier

For this tutorial example, we will first add a new supplier, then add a new customer.

Adding a Supplier

From the Navigator's opening screen, click on the 2nd of the large icons, **Suppliers** tab, then on the **New Supplier**

You will be shown this window to enter the details:

00	Ed	lit customer/supplier	
General Invoices Backorders Quotes Notes Contacts Group Purchase orders Web log-in Item lists Stock history	International Dispensary Association Name Code IDA Charge to IDA Name International Dispensary Association Master ID 0 S Master name	Contact email web site Phone Fax Status Price Category Hold A	Store: CMS Store Currency EUR Supplier details Margin 0 Freight factor 1 Printing Print invoices alphabetically
Store Photo	Category Other Customer Category 1 none Supplier Category 2 none Manufacturer Category 3 none Benchmark	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 & N	Cancel OK

You can now enter the details for your new Supplier.

Field	What to do			
Code	Enter "Acmep" 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)			
Charge to	Enter "Acmep" 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			
Category				
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			
Contact				
Email, Web site etc.	Fill in with the appropriate details			
Status				
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			
Price Category	This applies to customers. It is possible to assign multiple sell prices to customers. Leave it set to "A".			

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

Field	What to do
Supplier details	
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.
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.
Other	
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
Address	
Address, Main & Postal address.	You can complete these with appropriate values.

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

Adding a Customer

From the Navigator's opening screen, click on the 1st of the large icons, *Customers*, near the top of the screen, and then click on "New Customer" from the Navigator screen that appears. You will be presented with a window similar to the *New Supplier* one above to enter the details:

Fill in the fields as follows:

Field	What to do
Code	Enter "bluec"
Charge to	Enter "bluec"
Name	Enter "Blue Cross Hospital" - the name of our customer.
Master ID	Ignore for now
Category	
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
Status	
Hold checkbox	If this box is checked for supplier or customer, that particular supplier or customer can neither supply nor be supplied with items.
Price Category	This applies to customers. It is possible to assign multiple sell prices to customers. Leave it set to "A".

Field	What to do
Contact	·
email, web site, etc.	You can complete these with appropriate values.
Other	·
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
Addresses	
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* screen. You are presented with a window to enter as much of the Supplier name or the code as you know.

🏚 Show suppliers	×
Normal - Fuzzy	
Name filter	
Name Contains	
and Category 1 is Don't care	•
and Customer group Don't care	•
Search	
Selection ODonors	
Customers Exclude patients	
Suppliers	
V Exclude hidden names	
Complex Find Cancel Find	

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





For information on the Normal - Fuzzy slider, see Editing a Customer, Supplier or Manufacturer

Names	list											
-		×	-	5)		••	*		1	(8/22
New	M	odify	Set flags	Print	Fin	d O	rder by	Merge	Labels	Report	Customise	
Code	Charge		Name		Addre	ess 1		Address 2	Category	Flags	Pho	ne 4
Acmep	Acmep	Acme Pha	armaceuticals	Ltd	Chhetrapati R	oad	Kathmar	ndu			+977-14237761	
arbuck	arbuck	Arbuckle	distribution		Begnas Tal		Pokhara	I			977-1-29292	
bronze	bronze	Bronze Ag	je supplies									
Diam	diam	Diamond	traders									
gold	gold	Gold med	ical supplies									
leaf	leaf	Leaf Surg	ical supplies									
pearl	pearl	Pearl drug										
pulo	pulo		d Medicine Su	ppliers	12 Widget lar	e	Clueville					
					-							
•												۲.

• Double-click the "Acme Pharmaceuticals" entry in the list. You will be shown a window the same as you used to enter "Acme Pharmaceuticals" as a new supplier.

🔹 Edit customer/s	upplier					
General Invoices Backorders Quotes Notes Contacts Emails Group Purchase orders Web log-in Favourites Stock history Store	Acme Pharmaceuticals Ltd Name Code Acmep Code Acmep Charge to Acmep Master ID O Category Customer Cust		ct email acmepharm@mail.com.r reb site <u>www.acmepharm.com.r</u> Phone +977-14237761 Fax Other Category none	Store: General Supplier details Currency Nrs		
	Supplier	Preferred Price Category Price Category Postal address PO Box XYZ Kathmandu	Category 2 Category 3 Flag	Comment Comment	Print invoices	
Delete name	Country Nepal		(OK & Next Cancel	on Map OK	

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

eneral		
Ceneral Invoices Backorders Quotes Notes Contacts Group Purchase orders Web log-in Item lists Stock history Store	ធា ធា្ល Master ID	tional Dispensary A
Photo	Category	Other
	Customer 🗌	Category
	Supplier 🗹	Category

- 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.

cme Pharmaceuticals			Store: General
New Note Delete No	Add Customer/Supplier notes Date 14/06/11 Note This is a test note	Entered by : Modfied by:	user 1 (pass=
D	isplay when never	Pick Color Bee Cancel	ep 0 times

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

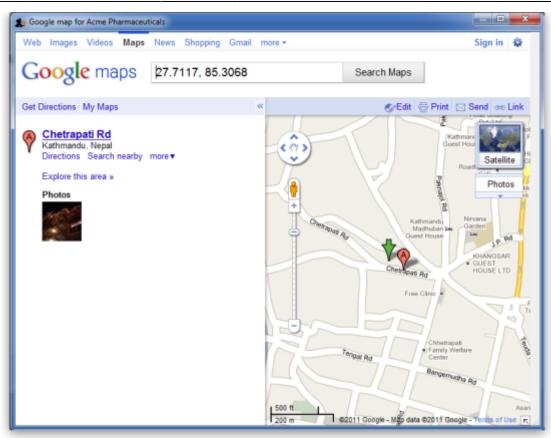
Viewing location in Google maps

If the precise geographical location of the supplier or customer is known, the **Lat** and **Long** fields can be completed in the *Photo* tab. Entries are made in these fields thus:

- decimal degrees, and not degrees, minutes and seconds
- in the **Lat** field, locations south of the Equator are entered as negative i.e. the number is preceded by a '-' sign
- in the **Long** field, locations west of the Prime meridian are entered as negative i.e. the number is preceded by a '-' sign

Don't know a precise location? Using Google Maps find the desired location and place the cursor on it. Right click and select **What's here** from the drop down list. The geographical co-ordinates are displayed at the top of the screen. These should be noted and copied to the appropriate **Lat** and **Long** fields in mSupply®

In our example, the location of the imaginary Acme Pharmaceuticals is on Chetrapati in Kathmandu. Click on the **Google Maps** button to display a map of the vicinity, with the precise location pinpointed by a green arrow.



Enter incoming goods (a supplier invoice)

In some countries an invoice for incoming goods is referred to as a "bill"- we use "supplier invoice" to mean the same thing.

Let's suppose we have just received a shipment containing two items from Acme Pharmaceuticals, and we want to enter these goods into stock. The invoice looks like this: <HTML>

</HTML>

From: Acme PharmaceuticalsBill no.:A939										
Item	Quan	Pack	Batch	Expiry	Price	Extension				
Amoxycillin Caps 250mg	1000	100	b93333	31/12/2015	344	344,000.00				
Cotrimoxazole 240mg/5mL susp	65	60	bb23d	31/10/2015	21	1,365.00				
Cotrimoxazole 240mg/5mL susp	100	60	bb22d	31/01/2016	21	2,100.00				
			-		Total:	347,465.00				

<HTML>

</HTML>

Choose **Supplier > New invoice** from the menu or navigator.

•••		Supp	plier in	voice																	
Name Name Their ref		□↓ □↓			9/12/201 0/00/00	16		Colour ce number : Status :	0 nw												
New line De	lete line	_		ne mary by	Batch	Price Lo	Purchas	e Order ID : Entered by : Store:	0												
Io I I <tr td=""> <tr td=""> <tr td=""> <tr <="" td=""><td>Item Name</td><td>Donor</td><td>Qty</td><td>Pack</td><td>Batch</td><td>Expiry</td><td>Cost Price</td><td>Sell Price</td><td>Price extensis</td><td></td></tr><tr><td>Hold Finalise</td><td>Other charges Item(s): Amount: Export batch: 0 Margin: 0.00</td><td>0.00</td><td></td><td></td><td>OK</td><td>& Next</td><td>Delete</td><td>Subtotal: 0 % tax: Total:</td><td>0. 0.</td><td>.00 .00</td></tr></tr></tr></tr>	Item Name	Donor	Qty	Pack	Batch	Expiry	Cost Price	Sell Price	Price extensis		Hold Finalise	Other charges Item(s): Amount: Export batch: 0 Margin: 0.00	0.00			OK	& Next	Delete	Subtotal: 0 % tax: Total:	0. 0.	.00 .00
Item Name	Donor	Qty	Pack	Batch	Expiry	Cost Price	Sell Price	Price extensis		Hold Finalise	Other charges Item(s): Amount: Export batch: 0 Margin: 0.00	0.00			OK	& Next	Delete	Subtotal: 0 % tax: Total:	0. 0.	.00 .00	
Item Name	Donor	Qty	Pack	Batch	Expiry	Cost Price	Sell Price	Price extensis		Hold Finalise	Other charges Item(s): Amount: Export batch: 0 Margin: 0.00	0.00			OK	& Next	Delete	Subtotal: 0 % tax: Total:	0. 0.	.00 .00	
Item Name	Donor	Qty	Pack	Batch	Expiry	Cost Price	Sell Price	Price extensis		Hold Finalise	Other charges Item(s): Amount: Export batch: 0 Margin: 0.00	0.00			OK	& Next	Delete	Subtotal: 0 % tax: Total:	0. 0.	.00 .00	
Item Name	Donor	Qty	Pack	Batch	Expiry	Cost Price	Sell Price	Price extensis													
Hold Finalise	Other charges Item(s): Amount: Export batch: 0 Margin: 0.00	0.00			OK	& Next	Delete	Subtotal: 0 % tax: Total:	0. 0.	.00 .00											

The cursor will be positioned in the *Name* field. Type "a" and then press the tab key. If there is only one supplier whose name starts with "a", the details will automatically be filled in.

Aname a		Entry date : 14/06/2011	
Their ref		Confirm date : 00/00/00	In
Comment	🏚 Choose name		×
			Go
New line Delete line	New		Purc
General Summary by Ite	Name	Code	
L Lo	Acme Pharmaceuticals	Acmep	Price
	Arbuckle distribution	arbuck	

In our case the supplier "Arbuckle distribution" was already present, so you are presented with a window listing the suppliers starting with "a". Double-click the line containing "Acme Pharmaceuticals" to choose them for this invoice. The insertion point will jump to the *Their ref.* field.

Type "A939" into the *Their ref.* field. Press the Tab key to advance to the *Comment* field.

In the Comment field you can type a comment or information to identify the invoice.

Note that the margin is showing as 10 percent (the percentage that will be added to your cost price to obtain the selling price).

Click the *New line* button to add the first invoice line. You will be presented with the window for adding invoice lines.

	A	dd/edit supplier invoice line
ltem	[
Quantity	0	New item
Pack size	1	Pack to one
Total quantity:	0	
Batch		Location
Expiry	00/00/00	Volume per pack m3 🛐
Invoice line unit cost (NPR)	0.0000	Adjusted local cost % Margin Sell price 0.00 0.00 0.000
Price extension (NPR)	0.00	Donor
		Cancel OK OK & Next

- The cursor will be positioned in the *Item* field. Type "a", then press the Tab key. You will be presented with a window listing all items whose name starts with "a". Double-click the "Amoxycillin 250mg tab/cap" entry to choose it. The cursor will now be positioned in the "Quantity" field.
- Enter the number of packs received in the *Quantity* field: "1000" (Note that this is the number of packs, not the total quantity of capsules). Press Tab to advance to the next field.
- Enter the pack size: "100." Press Tab to advance to the next field.
- The cursor will now be in the location field. Ignore this for now and press Tab again.
- You can also ignore the Volume per pack field and press Tab to keep going.
- Enter the batch number: "b93333." Press Tab to advance to the next field.
- Enter the expiry date: "31/12/2014" (Presuming you have dates set up to enter as dd/mm/yy. If your dates are set to the USA's mm/dd/yy format, enter "12/31/14"). You only have to enter 2 digits for the year, as long as the year is in the range 1961 to 2060. Dates outside this range must have the year entered as four digits. Press Tab to advance to the next field.
- In the "Invoice line cost" field enter the pack cost price: "344"
- The table shown in the picture at the bottom appears if you have *Show previous purchases* checked in your preferences. It will show purchases you have made of this item in the past.
- *Donor* is the donor who provided funds for the goods on this invoice. You can create donors by activating donor tracking in File/Preferences/Suppliers/New Supplier and then check the donor check box.

As we have another line to add, click the *OK and Next* button. The entry is recorded, and the window is now blank to accept your second invoice line.

- Enter "c" into the *item name* field and press tab. In the list of items showing, you will find "Cotrimoxazole 240mg/5mL susp". Double-click the entry.
- Enter the remaining invoice details for "Cotrimoxazole 240mg/5mL susp":
- num units: "65"
- pack size: "60" (Note that it is better to record the actual volume of most packs, unless the volume is not important- for example with an eye-drop, where you could record the pack as "1")
- batch: "bb23d"
- expiry: "31/12/2013"
- price: "21.00" (You can just enter "21")

Click the OK & Next button to save the details and start to enter another item.

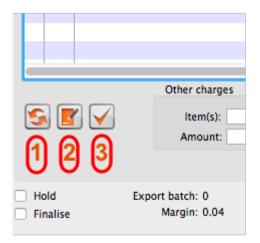
Now enter the third item on the supplier invoice from the example invoice from Acme Pharmaceuticals example invoice above.

When you have finished, click the OK button to take you back to the main list of invoices.

Our invoice will now have 3 items added to it. The invoice total should read "347,465", and should appear like this:

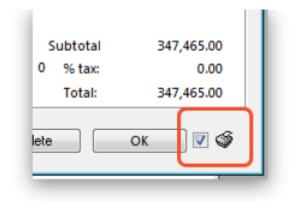
約 Su	upplier	invoice	:										×
The	lame [ir ref [/ ment [narmaceut	icals Acmep	I	Entry date : 14/06/2011 Colour : Black Confirm date : 00/00/00 Invoice number : 12 Status : nw Goods receive ID : 0							
Category None Purchase Order ID 0 New line Delete line Summary by Batch Price Category None Purchase Order ID 0 Entered by: user1 (pass= user1 Store: General										er1			
ι.	Lo		1	item Name		Qty	Pack	Batch	Expiry	Cost Price	Sell Price	Price extension	*
1		Amoxi	cillin 250m	ig tab/cap		1000	100	B93333	31/12/15	344.00	344.00	344,000.00	
2	2	Cotrim	oxazole 24	40mg/5ml susp		65	60	BB23D	31/10/15	21.00	21.00	1,365.00	
3		Cotrim	oxazole 24	40mg/5ml susp		100	60	BB22D	31/01/16	21.00	21.00	2,100.00	
													Ŧ
e,	2	1	Other d Item(s): Amount:		0.00)					Subtot 0 % ta: Tota	x: 0.00	D
	lold inalize	Ехро	ort batch: Margin:						OK & Next		lelete	ОК	I

If you have made a mistake, click on the relevant line , which will now be highlighted; double-clicking on it allows you to edit it. You will be shown the line details again, and you can then make corrections and click the *OK* button to save your changes. There are 3 icons in the lower left corner of the invoice window.



- 1. This allows you to rearrange the order in which the lines are shown on the invoice
- 2. Here you can make a note of anything relevant to this invoice
- 3. This will copy the details of the invoice to the clipboard

Now click the *OK* button. As long as you have left the "print" check box (bottom right corner) checked, you will be asked if you want to print the invoice (you may do so). Note that when you print, you are shown two windows. The first window is the page setup for your printer, the second window allows you to specify how many copies to print, etc. (The second window also has "preview" check box, where you can preview the print job).



As this invoice is a "supplier invoice" it has been "confirmed" when you clicked the OK button in the invoice entry window. You can view and edit the invoice details until the invoice is finalised. Note that if you issue some of the stock you have just entered to a customer, some fields relating to that stock will no longer be edit-able.

NOTE - As of mSupply® v190, a more precise alternative for entering received goods has been implemented. See Viewing and editing supplier invoices created via Goods Receipts

Enter outgoing goods (a customer invoice)

Now let's suppose we have just received an order as follows: <HTML>

</HTML>

From:	Blue Cross Hospital				
Order number:	PO882				
Delivery: Express courier please					
Item	Quan				
Amoxycillin 250mg tab/caps	10,000				
Cotrimoxazole 240mg/5mL susp	120				

<HTML>

</HTML>

Choose New Invoice from the Customer menu, and the following window appears:

00		Cus	tomer inv	voice					
Name Name	↓	Co	nfirm date	00/00/00				Colour : Bla	ick
Their ref								Invoice : 0	
Comment	↓		Category	None		\$	En	try date : 11/02/13	
Scripts			ITems				Goods re	ceive ID: 0	
								Status : nw	
-				1			Ent	ered by : sussol	
New line De	lete line(s)			History		Confirm		Store : CMS Store	
		y by Item	Summary	by Batch	Transport	t details -			
L Location	Item Name	Quan	Pack Size	Batch	Exp date	Sell Price	F	rice exten	
									_ 1
	Other charges	item:						Amount:	0.00
🗄 i 🖪 🖬	other charges	item:						ubtotal:	0.00
								0 % tax:	0.00
								Total:	0.00
Hold Finalize	Export batch: 0				OK &	Next	Delete	ОК	0 🗳

Type "b" into the *Name* field, and press the Tab key. You will be presented with a list of customers whose name starts with "b". Double-click the "Blue Cross Hospital" entry to select it.

- In the Their ref field enter "PO882".
- In the **Comment** field enter "This afternoon by courier"
- Click the **New line** button to add a line to the invoice. You are presented with the "Add item" window.

	A	dd item		
Item			1	New item
Quan 0 of 0				
Pack 0	Bulk/Outer pack size	0		
			Cancel OK	OK & Next

Enter the following details:

• Type "a" into the *Name* field then press the Tab key. In the list you are presented with, doubleclick the "Amoxycillin 250mg tab/cap" entry.

Item name	Item code	Stock on Hand	*
Aluminium diacetate solution, 13%	alu13s	0	
Aluminium hydroxide 320mg/5ml oral susp	alu500s	0	
Aluminium hydroxide 500mg tab	alu500t	0	
Amiloride hydrochloride 5mg tab	ami5t	0	
Amoxicillin + clavulanic ac 500mg tab	amoc500t	0	
Amoxicillin 125mg Tab	amo125tab	78	
Amoxicillin 250mg tab/cap	amo250t	120000	
Amoxicillin 500mg tab/cap	amo500t	4000	Ξ
Amphotericin b 50mg inj	amp50i	0	
Ampicillin sod 500mg inj.	amp500i	0	
Anti-d immunoglobulin (human) 250mcg inj	antd250i	0	
Antiscorpion sera inj	antsi	0	
Antitetanus immunoglob (human) 500IU inj	antt500i	0	
Antivenom serum	antvi	0	
Artemether 80mg/ml inj	art80i	0	Ŧ
Double-Click the item you want			

• You will see that a list of available stock has appeared in the window, and the cursor has moved to the **Line number** field. Enter "2" to choose line 2. (The list is sorted so batches with the shortest expiry date are at the top - usually you would choose the shortest expiry batch, but today we're being different!).

Line Quan		1	50mg tab/	ταμ						amo250t		Net	w item
Pack	\geq	100 ea Id Place P	holder	Bulk/Ou	iter pac	k size	0						
	Li	Issue	Availa	Tot in st	Pack	н	Batch	Expdate	Supplier	Location	Cost Pr	Sell pr	Status
	1	0	190	200	100		b39399	01/01/12	arbuck	A	343.00	343.00	
	2	0	1000	1000	100		893333	31/12/15	Acmep		344.00	344.00	
	4												1

• Quantity field - the line we have chosen has a pack size of "100", so we need to enter a quantity of "100" to make a total of 10,000

Click the **OK & next** button to add the second line of the order.

This time enter "c" and press the tab key. Double-click the "Cotrimoxazole 240mg/5mL susp" entry. The window will close and the list of available batches and quantities will be completed.

	Cotr	imoxazol	e 240mg/5	5ml susp					1	cot240s		Nev	v item	
Line			~											
Quan		_	65											
Pack		60 ml		Bulk/Ou	iter pac	k size	0							
	Ac	id Place I	holder											
	U	Issue	Availa	Tot in st	Pack	н	Batch	Expdate	Supplier	Location	Cost Pr	Sell pr	Status	
	1	0	65	65	60		BB23D	31/10/15	Acmep		21.00	21.00		
	2	0	100	100	60		BB22D	31/01/16	Acmep		21.00	21.00		
	_													
														2

Note that in the list of available stock, the second line we entered from "Acme pharmaceuticals" is now at the top of the list - this is because the list is sorted so that the item with the shortest expiry date comes to the top of the list.

Line 1 is selected, despite the fact that there is insufficient stock of line 1 to meet the order of 120. Nevertheless, you should enter "120" in the *Quantity* field, press **Tab**, and the following message will appear:

1

4	There is not enough stock of line 1 . Would you like to try again or treat the amount as the total quantity to be distributed over multiple batches?
	Try again Distribute

For this tutorial, choose **Distribute** (which is likely to be your normal choice), and the necessary stock to complete the order will be drawn from another batch/other batches, starting with the batch which will be the first to expire. There will be occasions, however, when you wish to override this automatic means of distribution, and in this event you would select *Try Again* and manually select the batches from which you wish to meet the order.

Click the OK & Next button

Because the invoice has not been confirmed, the "available" amount for the line has been reduced, but the "total stc" (total stock) is still showing as "100". mSupply® includes these lines in the list so you can see stock that has been allocated to an invoice but has not yet left your store. You can then edit the other invoice if stock is urgently needed on the current invoice.

Click *OK* as we are finished entering lines. You will be returned to the main Customer invoice window.

1	N	ame	Blue Cros	ss Hospital		Cont	firm date	00/00/00				Colour :	Black	
1	hei	r ref	f PO882		bluec							Invoice : 1	16	
c	mm	ient	t This after	noon by courie	er 📕		Category None			En	try date : 1	16/06/11		
						<i>.</i>					Goods receive ID: 0			
		÷.		6.			la B	a	R.	-		Status : I	w	
		eu. w li	ine Del	ete line(s)			Backo	-	listory	Confirm	Ent	ered by: u	user 1 (pass= u	iser1
										comm		Store : (General	
G	ene	ral	Summary	by Item Summ	ary by Batch Trans	port details								
		L	Location		Item Name		Quan	Pack Size	Batch	Exp date	Sell Price	Price	e exten	*
		1	A	Amoxicillin 25	0mg tab/cap		100	100	b39399	01/01/12	343.00		34,300.00	
		2		Cotrimoxazole	240mg/5ml susp		65	60	BB23D	31/10/15	21.00		1,365.00	
		3		Cotrimoxazole	240mg/5ml susp		55	60	BB22D	31/01/16	21.00		1,155.00	
11.														
		_												
												_		
16		6) 📔 🍕	1	Other charges	Item: Cour	ier charge					Amount:		0.00
				,							-	ubtotal:	37,020	
												0 % tax:		0.00
												Total:	37,020	0.00
	Но	ld												
	Fin	aliz	e Expo	rt batch: 0					UK & Next		Delete		JK	Ś
-	_	_												_

At the bottom right of the invoice you will see the invoice total.

- As the customer has requested an express courier, we will charge them Rs200 for the service (Rs = "rupees" the currency in our tutorial). At the bottom of the window you will see the *Other charges* field:
- There, enter "Courier charge" and press the **Tab** key
- In the "amount" field enter "200" and press the **Tab** key. The new total should be "37,020.00"

Now we are ready to print a packing slip. Make sure that **Print** is checked in the bottom right corner, and click **OK**; a window appears displaying your print options:

disk
cel

We want to print a packing slip, so the default settings suit our purpose. You will notice the packing slip printed has a column where you can write down the actual quantity packed.

Confirming the invoice:

Let's suppose the order was successfully packed according to the packing slip, and you now want to confirm the order and print an invoice to pack with the goods. (We're in a hurry - the express courier is on her way!)

First, we need to look up the invoice. Here's an easy way to look up the last invoice you have entered:

- Choose **Show invoices..** from the **Customer** menu.
- If you know the invoice number (printed on the packing slip) you can enter it. To bring a list of the most recent invoices, you enter the number of invoices to view. As we know the invoice we want is the last one to be entered, we just type "1" and click **OK** - you will be taken straight to the invoice.

Click the **Confirm** truck icon,

Confirm date	00/00/00	
Category	Stock History Or	der 🔻
	_	
1	1	
Backorders	History	Confirm

and today's date will appear in the **Confirm date** field. Click **OK** to confirm you want to proceed.

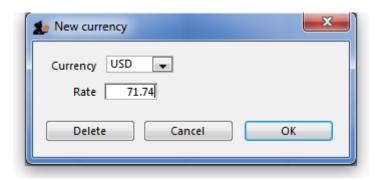
The invoice is confirmed, and you are given the opportunity to print an invoice.

Entering Quotations

mSupply® allows you to keep a record of prices that suppliers have quoted to you. Let's assume that you have just received 2 quotations for Amoxycillin 250mg capsules; one of the companies has used US dollars for their quotation, and the other has used British pounds, so before entering the details of the quotations, it is necessary that both of these currencies are recognised. To achieve this, choose the menu item **Special > Currencies**, and this window appears:

turrencies				×
•			S	
New	Update mSupply	Rate	Get Internet Rates	
Currency	mSupply Rate	Last Updated	Internet Rate	*
Nrs	1		0	
				Ŧ
•			4	
Rate	es provided by Yahoo!		ОК	

Click on the New button, and a window appears which allows you to enter another currency:



Enter "USD" in the Currency field; in the Rate field you should enter the number of units of the default currency - in this case Nepali Rupees - equivalent to 1 US dollar; at the time of compiling this tutorial, the rate was 71.74 N.Rs. to US \$1, so "71.74" is entered in the **Rate** field. Click on the **OK** button, and repeat the exercise for British pounds, the rate presently being 116.36.

Once you have performed this, the Currencies window should look like this:

• • •	Curre	ncies				
New		Update mSupply Rate Get				
New	opuate msupply	Kate	Get Internet Rates			
Currency	mSupply Rate	Last Updated	Internet Rate			
GBP	135.304		0			
NPR	1		0			
USD	108.408	19/12/16	0			
Rat	es provided by Yahoo!		OK			
			ОК			

We're now ready to proceed.

To enter a quotation:

1. Choose **Items > Show items**

- 2. Type "Amox" then press Enter.
- 3. Double-click the "Amoxycillin 250mg caps" entry from the list.
- 4. The item view window, on the left, has vertical content list (General, Usage, Quotes). Click the **Quotes** line.
- 5. Click the "New Quote" button.
- 6. Note that the item is entered for us. We need to choose a supplier and enter their price details.
- 7. Enter "Arb" in the supplier field and press tab. Arbuckle distribution is automatically chosen. They have quoted in US dollars, so choose "USD" from the currency menu.
- 8. Their price is US \$3.50 per 100 capsules, so enter "3.5" in the price field and "100" in the pack size field.
- 9. Click **OK** to save the entry
- 10. Now click "new quote" again and enter the following details:

<HTML>

</HTML>

Supplier	Gold Medical Supplies						
Currency	Sterling [GBP]						
Price	20.00						
Pack size	1000						

<htps://www.endication.com/articles/art

</HTML>

Click **OK** when you are done.

Now we can see the list of quotes, which should look like this:

• • •					Item de	tails						
General Misc Usage Stock Ledger	6) 6) (Item name Amoxic Item code amo250		g tab/cap						Store:	General	0
Quotes Backorders	_		e quote	Show:	All		0					
Notes Reconcile Bill of materials Purchase Orders Order options Dispensing Drug registration Reporting Log Requisitions Stores	3/06/16 21/09/16	Supplier Arbuckle distributio Bronze Age supplie: Drug Price Indicator Arbuckle distributio	NPR USD	Rate 108.4080 1.0000 108.4080 1.0000	Price 11.21 2,000.00 3.00 3.50	100	1.00 1.00 1.00	2,000.00	121.5253 200.0000 325.2240		Valid until	Manufact
Delete						OK &	Previous	OK &	Next	Can		ОК

Notice how the adjusted price takes into account differences in pack size and currency, so you can easily compare suppliers.

Thanks for working through the tutorial. We hope you learnt something useful, and now feel confident to start using mSupply®!

Where to now?

- Use the example database to experiment with different commands as you read about them in the user guide.
- Have a "dummy run" at starting a new data file and using it.
- Return to our main documentation page at www.docs.msupply.org.nz

Previous: Logging in Next: Working with lists

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