16.03 mSupply Customer Web Interface setting up customers

What is it?

The mSupply Customer Web Interface allows the staff of Customers in your mSupply system to order stock from a store in your mSupply system. It runs on a browser on any device: tablet, smartphone, net-book, desktop computer etc.

While the Customer Interface will run on smaller devices like smartphones, it is generally impractical to use with screens smaller than 5 inches across the diagonal.

Features and Limitations

The Customer Interface is designed to be used by staff of Customers in your mSupply system i.e. people working in places you supply. They could be people outside of your organisation.

The Customer Interface's features are:

- **Show Orders**: Display a list of the user's orders that are waiting to be processed by the supplying store. These orders can be opened to display further info.
- **Create Orders**: Orders for stock from the supplying store can be created, deleted and edited.
- Search Items: Search a list of Items available in the supplying store.

Obviously, this interface is for ordering stock only so there is no place for batch number or expiry date to be displayed or selected in the Customer Interface. However, mSupply does keep a record of the batch and expiry date of all stock issued to the Customer from the supplying store.

Turn on the customer web interface

To do this you simply need to turn on the mSupply web server. You can find details of how to do this on the mSupply Web Server page.

Setup each customer

There are 2 simple setup steps you need to carry out for each customer.

Last update: 2019/10/03 web_interface:msupply_customer_setup https://docs.msupply.org.nz/web_interface:msupply_customer_setup?rev=1570075495 04:04

1. Set the supplying store for each customer

Go to the customer's detail page (Select *Customer > Show customers...* from the menus, click on the **Find** button, find the customer in the list and double-click on them):

• • •	Ed	dit customer/supplier	
Ceneral Invoices Backorders Quotes Notes Contacts Croup Purchase Orders Item List	Test customer 01 Name Code testc01 Charge to testc01 Name Test customer 01 Type facility	Contact email web site Phone Fax Status Price Category	Store: G3 14-Day Store C
Requisitions Store Photo Custom data Log	Master ID 0 Sa	Hold A	Supplying store LAB Printing Print invoices alphabetically
coy.	Category Other Customer Category 1 none Supplier Category 2 none Manufacturer Benchmark	Category 4 none C Category 5 none C Category 6 none C Flag	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 & Ne	Xt Cancel OK

In the *Customer details* section, select the customer's supplying store from the drop down list. This is the store the customer's orders will be sent to and therefore the store that will send them goods in response to the orders.

2. Add logins for each customer

The logins for each customer are setup as contacts of the customer in mSupply. To set them up, go to the customer's detail page and go to the Contacts tab (Select *Customer > Show customers...* from the menus, click on the **Find** button, find the customer in the list and double-click on them. Finally, click on *Contacts* in the tab list on the left hand side.). This window is displayed:

0	_		Edit customer/su	applier		
eneral typices	Test customer 01				Store: G3 14	-Day Store 0
ackorders	+	-				
(uotes	Add Contact Delet	e Contact				
lotes						
ontacts	First	Last	Position	Email	Phone	Category
roup						
urchase Orders						
em List						
equisitions						
tore						
hoto						
ustom data						
og						
2						
					OK & Next C	ancel OK

To add a new login (contact), click on the **Add contact** button to open this window:

Last First	Web Login
Position Phone Email Address 1 Address 2 Country Comment Category Category 2 Category 3 Info if related to a customer or supplier Name Test customer 01	Can login to the web interface Username Password Groups This contact belongs to the following groups: Add Group Remove Group
Address 2 Country Comment Category Category 2 Category 3 Info if related to a customer or supplier	Add Group Remove Group

Enter the contact's name last and first names in the Last and First fields

In the *Web login* section check the *Can login to the web interface* checkbox then enter the contact's username and password in the *Username* and *Password* fields - these are the details they will login with.

Click the **OK** button to save the details. You can add as many contacts for a customer as you like, and they will all be able to login to the customer interface and create orders for that customer.

You can edit a contact's details by double-clicking them in the customer's list of contacts shown in the screenshot above.

To stop a contact from accessing the customer interface you can either delete them or you can uncheck the *Can login to the web interface* checkbox on their details page.

Repeat these 2 steps for all the customers who need to login to the interface.

Connecting to the Customer Web Interface

Once the mSupply web server is running, your customers can access it by opening an internet browser on any device and navigating to *URL:PORT/customer/* where *URL* is the internet address of your mSupply server and *PORT* is the figure you entered into the *Run the webserver on port* field in the preferences mentioned in the section above

An example is http://msupply.org:8080/customer/



The hyperlink above links to a demonstration site. Send us an email at info@msupply.org.nz if you would like a temporary username and password to try it out.

Once it has been setup correctly, get your customers to bookmark the customer interface web page to save them typing it in every time.

Previous: 16.02. The mSupply web server || Next: 16.04. mSupply Customer Web Interface guide for customers

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

Permanent link: https://docs.msupply.org.nz/web_interface:msupply_customer_setup?rev=1570075495

Last update: 2019/10/03 04:04

