



Issuing Stock on mSupply (Outbound)

Job Aid

MEBS Global Reach

Legacy mSupply

Issuing Stock on mSupply (Outbound)

Customer invoices are how we issue stock to customers. We have already seen how to generate a Customer invoice from a Requisition when our customer also uses mSupply.

For those customers that are not on mSupply, we have to create a Customer invoice manually.

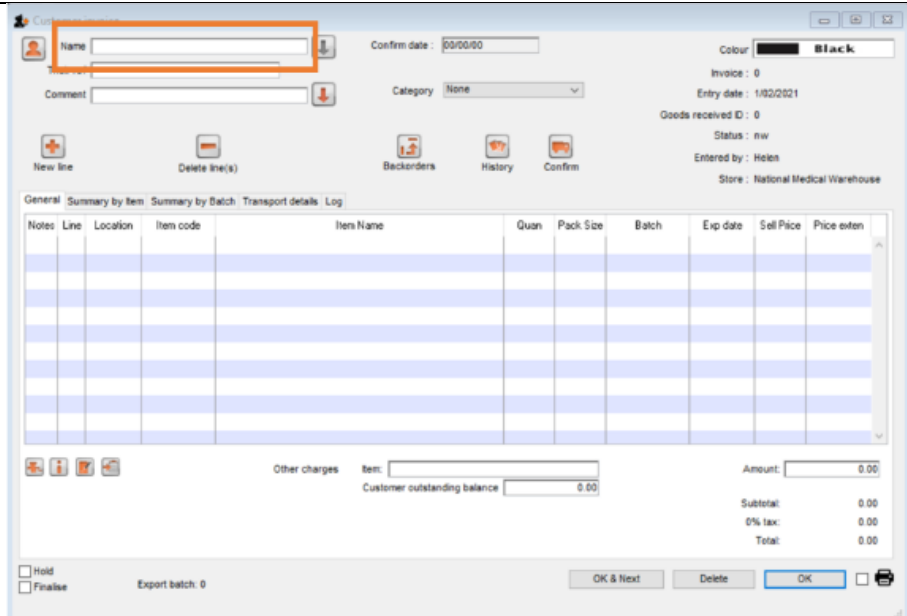
1. Navigate to the **Customer** tab



2. Click the **New** Customer invoice button

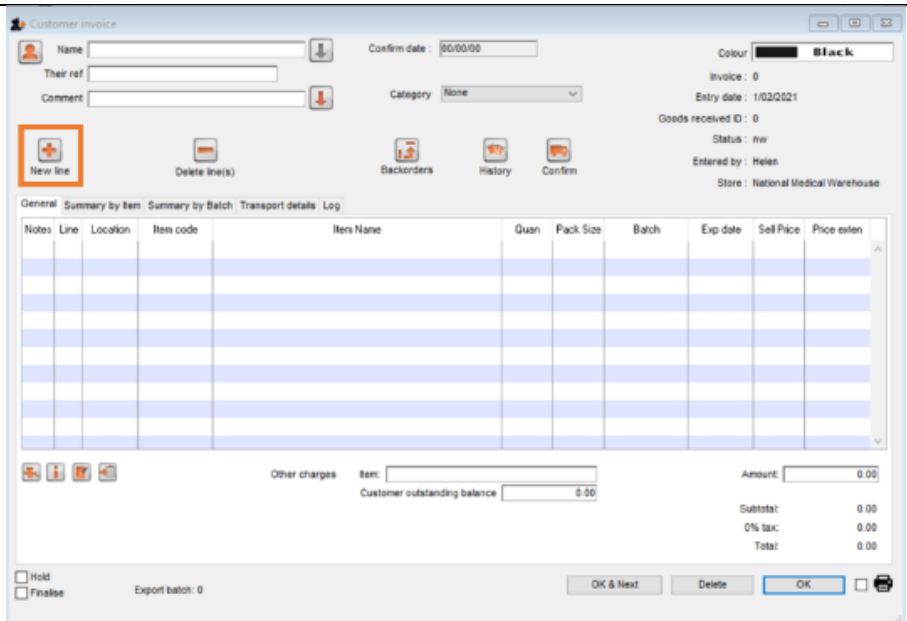


3. Search for the
Customer name



The screenshot shows the 'Customer invoice' form. The 'Name' field is highlighted with an orange box. Other fields include 'Confirm date', 'Colour' (set to Black), 'Invoice' (0), 'Entry date' (1/02/2021), 'Goods received ID' (0), 'Status' (nw), 'Entered by' (Helen), and 'Store' (National Medical Warehouse). Below these are buttons for 'New line', 'Delete line(s)', 'Backorders', 'History', and 'Confirm'. A table with columns 'Notes', 'Line', 'Location', 'Item code', 'Item Name', 'Quan', 'Pack Size', 'Batch', 'Exp date', 'Sell Price', and 'Price exten' is visible. At the bottom, there are fields for 'Other charges', 'Item', 'Amount' (0.00), 'Customer outstanding balance' (0.00), 'Subtotal' (0.00), '0% tax' (0.00), and 'Total' (0.00). Buttons for 'Hold', 'Finalise', 'Export batch: 0', 'OK & Next', 'Delete', and 'OK' are at the bottom.

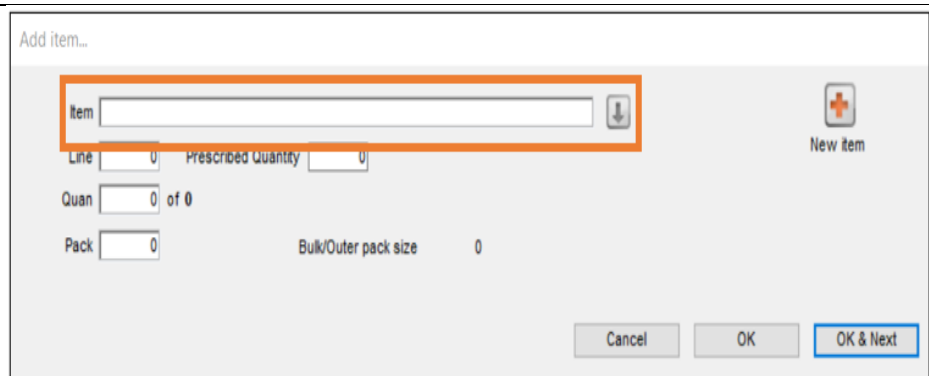
4. Click **New line** to start adding items to the Customer invoice



The screenshot shows the 'Customer invoice' form. The 'New line' button is highlighted with an orange box. The form structure is identical to the previous screenshot, showing fields for customer information, a table for items, and summary totals at the bottom.

5. Search for the **Item**

Remember you can search by
-typing the first few letters of the **Item name** and pressing **TAB**
-typing the **item code** and pressing **TAB**
-typing **@** and pressing **TAB**



The screenshot shows the 'Add item...' dialog box. The 'Item' field is highlighted with an orange box. Below it are fields for 'Line' (0), 'Prescribed Quantity' (0), 'Quan' (0 of 0), 'Pack' (0), and 'Bulk/Outer pack size' (0). There is a 'New item' button with a plus icon. At the bottom are 'Cancel', 'OK', and 'OK & Next' buttons.

mSupply will automatically select the next to expire (FEFO), so you don't need to select anything if you are ok with the default

Edit line...

Item Amoxicillin 500mg tab amo500t

Line 1 Prescribed Quantity 300

Quan 300 of 98090

Pack 100 Bulk/Outer pack size 0

Add Place holder Re-lookup Sell Price

| Line | Issue | Available | Tot in store | Pack | Hold | Batch | Expdate | Supplier | Donor | Location | Cost Price | Sell Price |
|------|-------|-----------|--------------|------|------|----------|------------|----------|-------|----------|------------|------------|
| 1 | 300 | 98090 | 98090 | 100 | | NBJ900 | 31/05/2023 | invad | | A1 | 0.03 | |
| 2 | 0 | 30000 | 30000 | 1 | | FGT77865 | 30/11/2024 | invad | | B2 | 0.02 | |

Total quantity issued 30000
Total quantity available 9839000

Cancel OK OK & Next

6. Enter the **Quantity** to issue, this is the total number of **Packs** so pay attention to the pack size

Edit line...

Item Amoxicillin 500mg tab amo500t

Line 1 Prescribed Quantity 300

Quan 300 of 98090

Pack 100 Bulk/Outer pack size 0

Add Place holder Re-lookup Sell Price

| Line | Issue | Available | Tot in store | Pack | Hold | Batch | Expdate | Supplier | Donor | Location | Cost Price | Sell Price |
|------|-------|-----------|--------------|------|------|----------|------------|----------|-------|----------|------------|------------|
| 1 | 300 | 98090 | 98090 | 100 | | NBJ900 | 31/05/2023 | invad | | A1 | 0.03 | |
| 2 | 0 | 30000 | 30000 | 1 | | FGT77865 | 30/11/2024 | invad | | B2 | 0.02 | |

Total quantity issued 30000
Total quantity available 9839000

Cancel OK OK & Next

7. To add another line, click **OK & Next**

Edit line...

Item Amoxicillin 500mg tab amo500t

Line 1 Prescribed Quantity 300

Quan 300 of 98090

Pack 100 Bulk/Outer pack size 0

Add Place holder Re-lookup Sell Price

| Line | Issue | Available | Tot in store | Pack | Hold | Batch | Expdate | Supplier | Donor | Location | Cost Price | Sell Price |
|------|-------|-----------|--------------|------|------|----------|------------|----------|-------|----------|------------|------------|
| 1 | 300 | 98090 | 98090 | 100 | | NBJ900 | 31/05/2023 | invad | | A1 | 0.03 | |
| 2 | 0 | 30000 | 30000 | 1 | | FGT77865 | 30/11/2024 | invad | | B2 | 0.02 | |

Total quantity issued 30000
Total quantity available 9839000

Cancel OK OK & Next

8. To print a Picking slip, check the **Print** box and click **OK**

Facility staff pick the stock and prepare for delivery

Customer invoice

Name: Kerang Hospital
Their ref: KHD
Comment:
Confirm date: 00/00/00
Category: None
Colour: Black
Invoice: 3
Entry date: 1/02/2021
Goods received ID: 0
Status: n/w
Entered by: Helen
Store: National Medical Warehouse

New line Delete line(s) Backorders History Confirm

General Summary by item Summary by Batch Transport details Log

| Notes | Line | Location | Item code | Item Name | Quan | Pack Size | Batch | Exp date | Sell Price | Price exten |
|-------|------|----------|-----------|-----------------------|------|-----------|-----------|------------|------------|-------------|
| | 1 | A1 | amo500i | Amoxicillin 500mg tab | 300 | 100 | NB/300 | 31/05/2023 | 0.03 | 9.00 |
| | 2 | B1 | cefz250i | Ceftriaxone 250mg inj | 100 | 10 | BJ/696 | 29/02/2027 | 1.12 | 112.00 |
| | 3 | C1 | ibu200i | Ibuprofen 200mg tab | 50 | 100 | HGS164583 | 31/01/2023 | 0.02 | 1.00 |
| | 4 | A1 | par500i | Paracetamol 500mg tab | 450 | 1 | JO890 | 30/04/2026 | 0.01 | 4.50 |

Other charges Item: Amount: 0.00
Customer outstanding balance 0.00

Subtotal: 126.50
0% tax: 0.00
Total: 126.50

Hold Finalise Export batch: 0 Stock transfer OK & Next Delete OK Print

9. When the order is picked and is awaiting transport, reopen the Customer invoice from the **Customer invoices list**

mSupply

Customer Suppliers Item Reports Special Admin

Customer invoices Customers Transaction categories

Requests Note credit Cash receipts Categories

Data File Demo Land 402
National Medical Warehouse
Helen

mSupply DEMO LAND

10. Click the **Confirm** button

Customer invoice

Name: Kerang Hospital
Their ref: KHD
Comment:
Confirm date: 00/00/00
Category: None
Colour: Black
Invoice: 3
Entry date: 1/02/2021
Goods received ID: 0
Status: n/w
Entered by: Helen
Store: National Medical Warehouse

New line Delete line(s) Backorders History Confirm

General Summary by item Summary by Batch Transport details Log

| Notes | Line | Location | Item code | Item Name | Quan | Pack Size | Batch | Exp date | Sell Price | Price exten |
|-------|------|----------|-----------|-----------------------|------|-----------|-----------|------------|------------|-------------|
| | 1 | A1 | amo500i | Amoxicillin 500mg tab | 300 | 100 | NB/300 | 31/05/2023 | 0.03 | 9.00 |
| | 2 | B1 | cefz250i | Ceftriaxone 250mg inj | 100 | 10 | BJ/696 | 29/02/2027 | 1.12 | 112.00 |
| | 3 | C1 | ibu200i | Ibuprofen 200mg tab | 50 | 100 | HGS164583 | 31/01/2023 | 0.02 | 1.00 |
| | 4 | A1 | par500i | Paracetamol 500mg tab | 450 | 1 | JO890 | 30/04/2026 | 0.01 | 4.50 |

Other charges Item: Amount: 0.00
Customer outstanding balance 0.00

Subtotal: 126.50
0% tax: 0.00
Total: 126.50

Hold Finalise Export batch: 0 Stock transfer OK & Next Delete OK Print

- When the order has left your store, check the **Finalise** box and click **OK**

Customer invoice

Name: Karang Hospital
 Their ref: KHD
 Comment:
 Confirm date: 1/02/2021
 Category: None
 Invoice: 3
 Entry date: 1/02/2021
 Goods received ID: 0
 Status: on
 Entered by: Helen
 Store: National Medical Warehouse

General Summary by Item Summary by Batch Transport details Log

| Notes | Line | Location | Item code | Item Name | Qunt | Pack Size | Batch | Exp date | Sell Price | Price exten |
|-------|------|----------|-----------|-----------------------|------|-----------|-----------|------------|------------|-------------|
| | 1 | A1 | amc500 | Amoxicillin 500mg tab | 300 | 100 | NB2000 | 31/05/2022 | 0.03 | 3.00 |
| | 2 | B1 | cef250 | Cefixone 250mg iq | 100 | 10 | 9-jh090 | 28/02/2022 | 1.12 | 112.00 |
| | 3 | C1 | ibu200 | Ibuprofen 200mg tab | 50 | 100 | H05164503 | 31/01/2023 | 0.02 | 1.00 |
| | 4 | A1 | par500 | Paracetamol 500mg tab | 450 | 1 | jh0990 | 30/04/2026 | 0.01 | 4.50 |

Other charges: Item:
 Customer outstanding balance: 0.00
 Amount: 6.00
 Subtotal: 126.50
 0% tax: 0.00
 Total: 126.50

Finalise Export batch: 0 Stock transfer OK & Next Delete OK

Let's go over the process again!

- Navigate to the **Customer** tab



- Click the **New Customer Invoice** button



3. Search for the **Customer** name

The screenshot shows the 'Customer Invoice' form in the mSupply application. A blue callout box with the text 'Search for the Customer name' points to the 'Name' field at the top left. The form includes fields for 'Confirm date', 'Colour', 'Invoice', 'Entry date', 'Goods received ID', 'Status', 'Entered by', and 'Store'. Below these is a table with columns: 'No.', 'Line', 'Location', 'Item code', 'Item Name', 'Quan', 'Pack Q', 'Batch', 'Exp date', 'Sell Pk', and 'Price enter'. At the bottom, there are fields for 'Other charges', 'Item', 'Amount', 'Customer outstanding balance', 'Subtotal', 'P% tax', and 'Total'. Buttons for 'OK & Next', 'Delete', and 'OK' are visible.

4. Click the **New line** button to start adding items

This screenshot is similar to the previous one, but a blue callout box with the text 'Click the New line button to start adding items' points to the 'New line' button, which is represented by a plus sign icon in the top left area of the form.

5. Search for the **item**

The screenshot shows the 'Add Item...' dialog box open over the 'Customer Invoice' form. A blue callout box with the text 'Search for the Item' points to the 'Item' field within this dialog. The dialog also includes fields for 'Line', 'Quan', and 'Pack', along with 'Cancel', 'OK', and 'OK & Next' buttons.

- Enter the **Quantity** to issue, paying attention to the **Pack size**

- mSupply will automatically choose to issue the first item line to expire

- Click **OK & Next** to keep adding more items

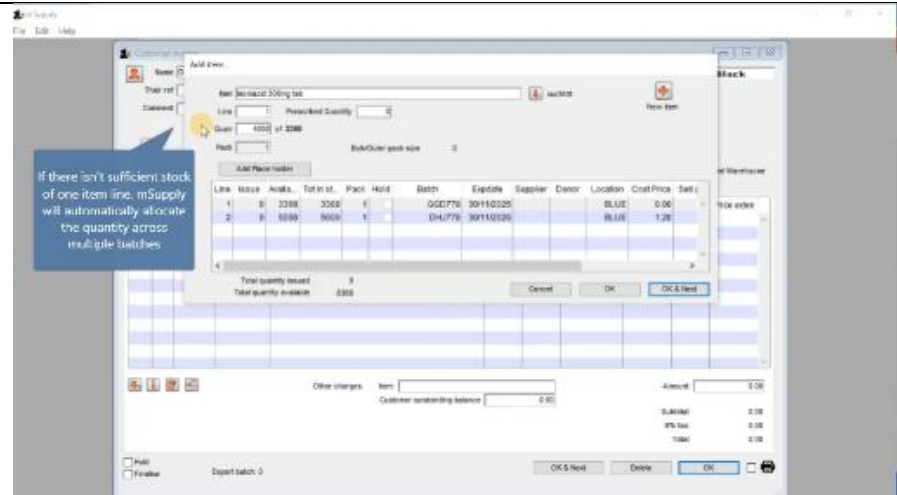
8. Add the next **item...**

Add the next **item...**

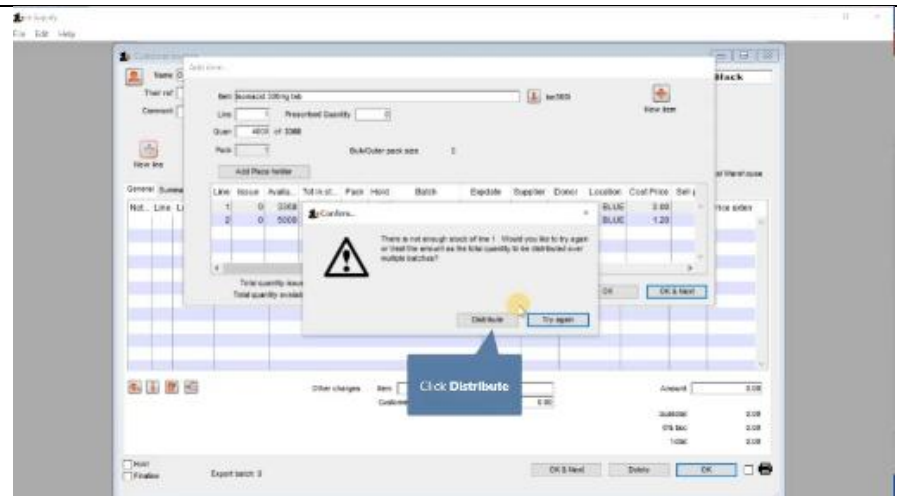
Add the next item...

Issuing Stock on mSupply (Outbound)

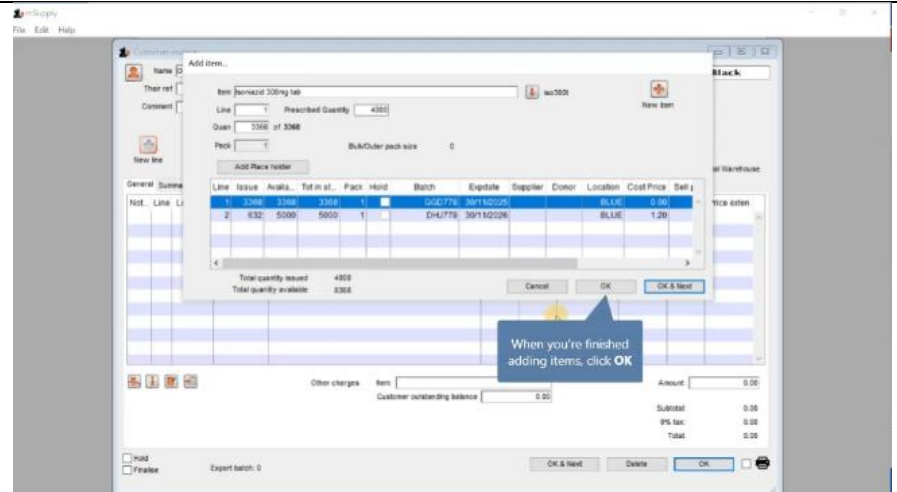
If there isn't sufficient stock of one item line, mSupply will automatically allocate the quantity across multiple batches



9. Click **Distribute**



10. When you finish adding items, click **OK**



There are 2 lines of the last item we added!

Customer Invoice

Name: Outreach Service

Confirm date: 20/09/00

Invoice #: 8

Entry date: 15/02/2021

Goods received ID: 0

Status: inv

Entered by: Helen

Store: National Medical Warehouse

| Item | Line | Location | Item code | Item Name | Quan | Pack St | Batch | Exp date | Sell Pts | Price enter |
|------|------|----------|-----------|-----------------------|------|---------|--------|------------|----------|-------------|
| | 1 | | amox500 | Amoxicillin 500mg tab | 200 | 1 | HQJ889 | 31/03/2021 | 0.10 | 200.00 |
| | 2 | BLUJE | par500 | Paracetamol 500mg tab | 1000 | 1 | DH4989 | 30/11/2022 | 0.20 | 200.00 |
| | 3 | BLUJE | met500 | Metformin 500mg tab | 900 | 1 | T01682 | 31/12/2020 | 0.20 | 180.00 |
| | 4 | BLUJE | iso500 | Isoniazid 500mg tab | 3360 | 1 | GG0779 | 30/11/2020 | 0.00 | 0.00 |
| | 5 | BLUJE | iso500 | Isoniazid 500mg tab | 632 | 1 | DH4779 | 30/11/2020 | 1.20 | 758.40 |

Other charges: 0.00

Customer outstanding balance: 0.00

Subtotal: 1,150.40

Tax: 0.00

Total: 1,150.40

Buttons: OK & Next, Delete, OK

11. Click the **Print** box and click **OK** to print a picking slip

Customer Invoice

Name: Outreach Service

Confirm date: 20/09/00

Invoice #: 8

Entry date: 15/02/2021

Goods received ID: 0

Status: inv

Entered by: Helen

Store: National Medical Warehouse

| Item | Line | Location | Item code | Item Name | Quan | Pack St | Batch | Exp date | Sell Pts | Price enter |
|------|------|----------|-----------|-----------------------|------|---------|--------|------------|----------|-------------|
| | 1 | | amox500 | Amoxicillin 500mg tab | 200 | 1 | HQJ889 | 31/03/2021 | 0.10 | 200.00 |
| | 2 | BLUJE | par500 | Paracetamol 500mg tab | 1000 | 1 | DH4989 | 30/11/2022 | 0.20 | 200.00 |
| | 3 | BLUJE | met500 | Metformin 500mg tab | 900 | 1 | T01682 | 31/12/2020 | 0.20 | 180.00 |
| | 4 | BLUJE | iso500 | Isoniazid 500mg tab | 3360 | 1 | GG0779 | 30/11/2020 | 0.00 | 0.00 |
| | 5 | BLUJE | iso500 | Isoniazid 500mg tab | 632 | 1 | DH4779 | 30/11/2020 | 1.20 | 758.40 |

Other charges: 0.00

Customer outstanding balance: 0.00

Subtotal: 1,150.40

Tax: 0.00

Total: 1,150.40

Buttons: OK & Next, Delete, OK

12. Find the **Customer Invoice** in the list

mSupply Navigator

Customer, Suppliers, Item, Reports, Special, Admin

Customer Invoice, Customers, Cash receipts, Transaction categories, Categories

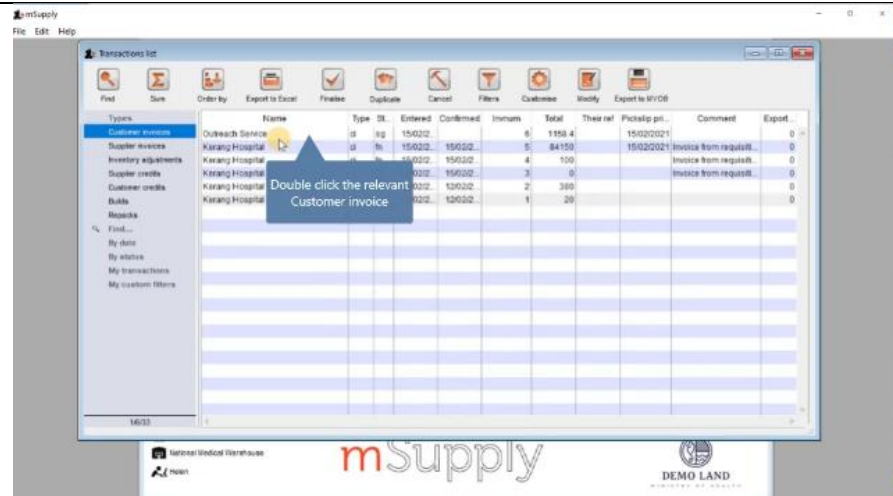
mSupply

DEMO LAND

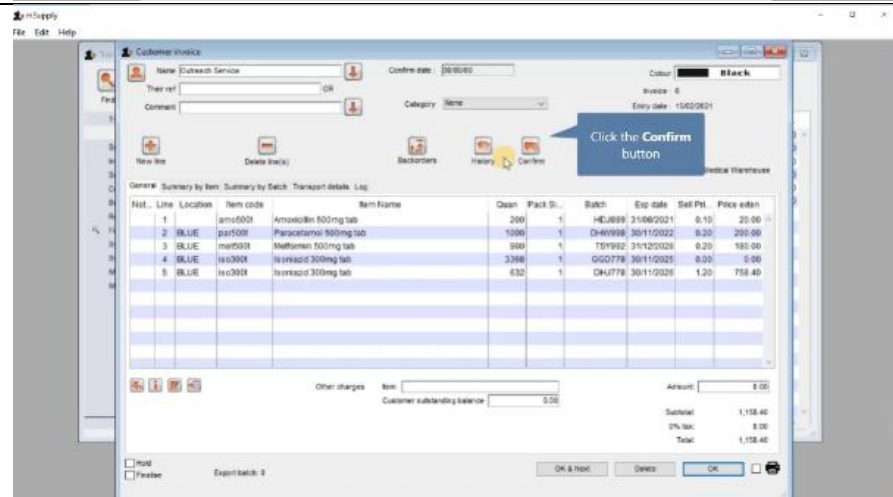
13. Click **Find**



14. Double click the relevant Customer invoice



15. Click the **Confirm** button



Issuing Stock on mSupply (Outbound)

16. Click **Yes**

The screenshot shows the 'Customer Invoice' window in mSupply. A confirmation dialog box is displayed in the center, asking 'Are you sure you want to confirm the invoice?'. Below the dialog box, a blue arrow points to the 'Yes' button with the text 'Click Yes'. The background window shows invoice details for 'Outreach Service' with a confirm date of 15/02/2021. The invoice table lists five items: Amoxicillin 500mg tab, Paracetamol 500mg tab, Metformin 500mg tab, Isosorbide 300mg tab, and Isosorbide 300mg tab. The total amount is 1,158.40.

| Item | Line | Location | Item code | Item Name | Quan | Pack Sl... | Batch | Exp date | Sell Pri... | Price exten |
|------|------|----------|-----------|-----------------------|------|------------|--------|------------|-------------|-------------|
| 1 | | | amc500i | Amoxicillin 500mg tab | 200 | 1 | HCJ889 | 31/08/2021 | 0.10 | 20.00 |
| 2 | BLUE | | par500i | Paracetamol 500mg tab | 1000 | 1 | DAW998 | 30/11/2022 | 0.20 | 200.00 |
| 3 | BLUE | | met500i | Metformin 500mg tab | 900 | 1 | TBY992 | 31/12/2023 | 0.20 | 180.00 |
| 4 | BLUE | | iso300i | Isosorbide 300mg tab | 3366 | 1 | GGZ776 | 30/11/2025 | 0.00 | 0.00 |
| 5 | BLUE | | iso300i | Isosorbide 300mg tab | 632 | 1 | GHJ778 | 30/11/2025 | 1.20 | 758.40 |

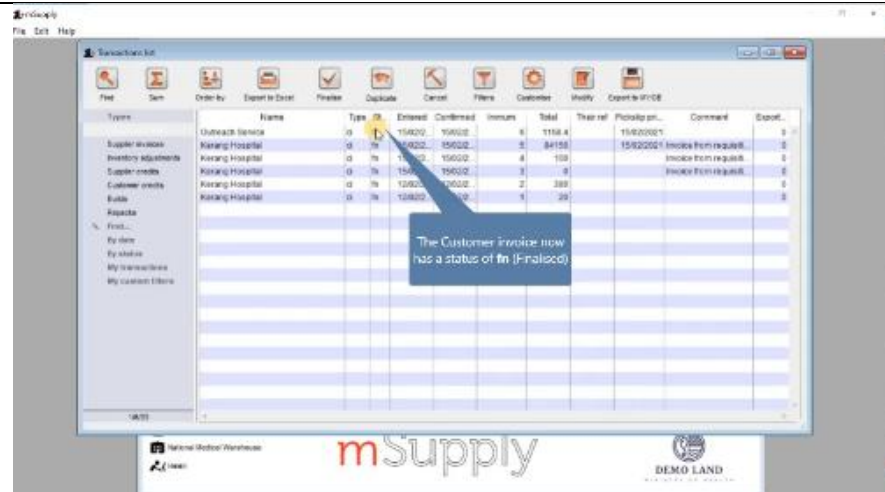
17. When the stock has left your facility, check the **Finalise** box

The screenshot shows the 'Customer Invoice' window in mSupply. A blue arrow points to the 'Finalise' checkbox at the bottom left of the window. A text box next to the arrow says 'When the stock has left your facility, check the Finalise box'. The background window shows the same invoice details as in the previous screenshot.

18. Click **OK**

The screenshot shows the 'Customer Invoice' window in mSupply. A blue arrow points to the 'OK' button at the bottom right of the window. A text box next to the arrow says 'Click OK'. The background window shows the same invoice details as in the previous screenshots.

The Customer invoice now has a status of **fn** (Finalised)



Customer invoice transaction statuses

1. Suggested (sg)

Before confirming a Customer invoice, you can still

- Close and open it again to make changes
- Create picking slips

2. Confirmed (cn)

Here, the order is now packed and awaiting dispatch. It may be in a loading area or waiting bay.

3. Finalised (fn)

Once the item is actually dispatched and leaves the facility, it should be finalised. It cannot be edited after it is finalised.

Open mSupply

Issuing Stock on mSupply

An **Outbound Shipment** is the process of physically sending stock from your store to another facility. This is a critical step in fulfilling a requisition that has already been reviewed and approved, and it represents the actual movement of goods out of your store.

When To Use An Outbound Shipment?

Outbound Shipments are needed when:

- A requisition from a customer has been approved and you're ready to issue stock.
- Items have been picked and packed for delivery.
- You want to document what is being sent (batch, quantity, expiry, etc.).
- You want to trigger the record of stock leaving your store.

Examples of Outbound Shipments being used

| Role | What they do |
|-------------------|--|
| Warehouse Staff | Create the outbound shipment, pick and pack stock, and dispatch. |
| Store Managers | Review and approve outbound shipments before confirming dispatch. |
| Picker or Packers | Physically locate and pick the allocated stock from the warehouse, pack items for shipment, and mark them as picked in the system. |
| Customer Store | Receives the stock as an Inbound Shipment. |

Why It Matters

- **Maintains traceability:** Tracks exactly what was sent, including expiry and batch.
- **Ensures accuracy:** Prevents issuing wrong quantities or expired items.
- **Improves accountability:** Provides a record for audits and resolving disputes.
- **Automates stock movement:** Automatically deducts stock from inventory once dispatched.

Outbound Shipment Stages

Each shipment in Open mSupply moves through a series of clearly defined stages. These stages help track the status of the shipment from preparation to delivery and final confirmation.

Understanding each step is essential for managing stock movement, ensuring accountability, and supporting accurate reporting across stores.

The screenshot displays the 'Outbound Shipments / 48' interface in mSupply. The left sidebar shows navigation options: Dashboard, Reports, Distribution (highlighted with a purple box and a '1' in a circle), Replenishment, Catalogue, Inventory, and Cold chain. The 'Distribution' menu includes 'Outbound Shipment...' (highlighted), 'Requisitions', 'Customer Returns', and 'Customers'. The main area shows details for a shipment to 'Health Clinic' with reference 'From internal order 44'. A table lists items with columns: Code, Name, Batch, Expiry, Location, Unit, Pack Size, Pack Qty, Unit Qty, and Unit Sell Price. Three items are listed: Acetylsalicylic Acid 100mg tabs, Amoxicillin 250mg tabs, and Bandage W.O.W. 15cm wide x 5m roll. At the bottom, a status bar shows 'Hold' and a progress bar with stages: New, Allocated, Picked, Shipped, Delivered, and Verified. A 'Confirm Allocated' button is highlighted with a purple box and a '3' in a circle. A '2' in a circle is also present near the status bar.

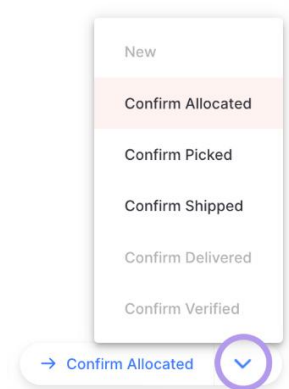
Go to **Distribution** → **Outbound Shipment** (1). Once inside an Outbound Shipment, you will be able to see the stage your shipment is on (2), and update the status as it is completed.

| Stage | Description |
|-----------|--|
| New | Shipment created; no stock selected yet. |
| Allocated | Specific stock (batches) selected for the shipment. The stock that is allocated will be removed from your store's available stock. |
| Picked | Items are physically picked and packed. |
| Shipped | The shipment has left your store. |
| Delivered | The shipment has reached the customer, but the stock hasn't been received into their store yet. |
| Verified | Customer completes a final check of verifying goods that have come in and confirms the shipment details so no other changes can be made. |

Not all shipments need to go through every stage.

Depending on your workflow and system settings, you may skip some steps — for example, going straight from Allocated to Shipped.

Select the dropdown shown to skip stages more quickly.



After each stage of the Outbound Shipment process is completed, the user must confirm the status in the system to reflect progress.

Outbound Shipments / 40

Customer Name: District Dispensary

Customer Reference:

Group by item

| | Code | Name | Batch | Expiry | Location | Unit | Pack Size | Pack Qty | Unit Qty | Unit Sell Price |
|--------------------------|--------|---------------------------------|----------|------------|----------|--------|-----------|----------|----------|-----------------|
| <input type="checkbox"/> | 030063 | Acetylsalicylic Acid 100mg tabs | asfs3432 | 31/12/2025 | | Tablet | 100 | 1 | 100 | \$0.00 |
| <input type="checkbox"/> | 030453 | Amoxicillin 250mg tabs | asfs3432 | 31/12/2025 | | Tab | 10 | 10 | 100 | \$0.43 |
| <input type="checkbox"/> | 201116 | Bandage W.O.W. 1 | | | | Roll | 1 | 20 | 20 | \$0.35 |

Are you sure?
Confirm status as Shipped?

Cancel OK

Hold New Allocated Picked Shipped Delivered Verified

Confirm Shipped

If you are skipping statuses, make sure to confirm afterwards to ensure the progress is complete. This will give a warning (1) and once the action is complete, the status will update to blue (2) and the button (3) will show the next stage.

Updating the status ensures everyone involved knows exactly where the shipment stands — whether it's still being packed, already shipped, or awaiting verification at the receiving store. This helps keep the process transparent, organised, and accountable.

Inbound Shipments

New Shipment

Filters

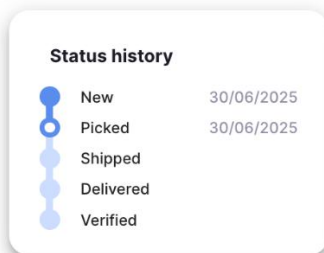
| | Name | Status | Invoice Number | Created | Delivered | Reference |
|--------------------------|--------------------|-----------|----------------|------------|------------|-------------------------------|
| <input type="checkbox"/> | District Warehouse | Picked | 27 | 30/06/2025 | | From invoice number: 48 (F... |
| <input type="checkbox"/> | District Warehouse | Verified | 26 | 17/06/2025 | 17/06/2025 | From invoice number: 42 (F... |
| <input type="checkbox"/> | District Warehouse | Delivered | 25 | 05/06/2025 | 05/06/2025 | |
| <input type="checkbox"/> | District Warehouse | Verified | 24 | 05/06/2025 | 05/06/2025 | From invoice number: 44 (F... |
| <input type="checkbox"/> | District Warehouse | Verified | 23 | 14/04/2025 | 14/04/2025 | From invoice number: 38 (F... |
| <input type="checkbox"/> | District Warehouse | Shipped | 22 | 25/03/2025 | | From invoice number: 37 (F... |
| <input type="checkbox"/> | District Warehouse | Verified | 21 | 11/02/2025 | 11/02/2025 | From invoice number: 33 (F... |
| <input type="checkbox"/> | District Warehouse | Delivered | 20 | 07/01/2025 | 07/01/2025 | |
| <input type="checkbox"/> | District Warehouse | Verified | 19 | 07/01/2025 | 07/01/2025 | From invoice number: 32 (F... |
| <input type="checkbox"/> | District Warehouse | Verified | 17 | 06/01/2025 | 06/01/2025 | From invoice number: 30 |
| <input type="checkbox"/> | District Warehouse | Verified | 16 | 06/01/2025 | 06/01/2025 | From invoice number: 29 |
| <input type="checkbox"/> | District Warehouse | Delivered | 14 | 05/01/2025 | 05/01/2025 | From invoice number: 28 (F... |
| <input type="checkbox"/> | District Warehouse | Verified | 13 | 04/01/2025 | 04/01/2025 | From invoice number: 26 (F... |
| <input type="checkbox"/> | District Warehouse | Verified | 12 | 03/01/2025 | 03/01/2025 | From invoice number: 25 (F... |
| <input type="checkbox"/> | District Warehouse | Verified | 11 | 03/01/2025 | 03/01/2025 | From invoice number: 24 (F... |

Showing 1-25 of 25

Rows per page: 500

The customer can see the most recent statuses of their past orders in the list. Selecting an order and viewing the Status history (shown below) will provide status date updates.

When the supplying store updates the shipment status, it will reflect in the customer's store. The customer can go into their order and view these dates to track their order's progress.



☐ Hold **New** > **Picked** > Shipped > Delivered > Verified

Performing an Outbound Shipment

Now that you know what an outbound shipment is, when to use it, and how the status works, it's time to walk through the process step by step.

In the following sections, you'll learn how to allocate items, pick and pack stock, update the shipment status, and complete the shipment.

Allocating Stock

Allocating stock is the process of choosing the exact stock (batch, quantity, and pack size) that will be sent to the customer.

In some settings, this task is done by a supervisor or manager who decides *what* to send, and then a picker/packer physically collects the items based on that allocation.

In smaller stores, it might be the same person doing it all.

Either way, allocating ensures the correct stock will be prepared for dispatch, with traceability of expiry, location, and quantity.

How to Allocate Stock

Select an item line (e.g., *Acetylsalicylic Acid 100mg tabs*) to open the **Edit Item** window. This lets you choose which batches will be used to issue stock for the shipment.

Edit Item

Item: 030063 Acetylsalicylic Acid 100mg tabs

Available: 72553 Tablets

Issue Tablets

| Batch | Expiry | Location | Pack sell price | Pack Size | In Store (packs) | Available (packs) | Packs Issued | Tablets Issued | On Hold |
|-----------------------|------------|----------|-----------------|-----------|------------------|-------------------|--------------|----------------|---------|
| arr214 | 31/12/2020 | SA | \$0.05 | 20 | 98 | 98 | 0 | 0 | |
| ✓ abg414 | 31/08/2025 | SA | \$0.05 | 100 | 57 | 57 | 0 | 0 | |
| ✓ ser421 | 30/11/2025 | SA | \$0.10 | 1 | 2 | 2 | 0 | 0 | |
| ✓ asfs3432 | 31/12/2025 | SA | \$0.03 | 100 | 20 | 19 | 0 | 0 | |
| ✓ asfs3432 | 31/12/2025 | SA | \$0.03 | 1 | 100 | 100 | 0 | 0 | |
| ✓ arr214 | 31/12/2020 | SA | \$0.05 | 1 | 98 | 98 | 0 | 0 | |
| Total quantity | | | | | | | | 100 | |

You have two allocation options which will be discussed below: (1) **Auto-allocate using the Issue**, and (2) **Manual allocation using Packs Issued**

1. Auto-allocate using the Issue field

- Enter a number into the **Issue** field at the top (e.g., "100 Tablets").
- The system will automatically allocate that quantity starting with the **ticked batches** (seen on the left column). Auto-allocation is based on FEFO.

This method is useful when you want to allocate quickly without selecting packs manually. You can also use the **dropdown box** if you want to allocate in **units** (e.g., "Tablets") or different **pack sizes**.

2. Manual allocation using Packs Issued

- Instead of using the top "Issue" field, you can directly type how many packs to issue in the **Packs Issued** column for each batch or stock line.
- This gives you full control to choose specific batches (e.g., based on expiry, pack size, or location), including those that are expired.

Edit Item

Item: 030063 Acetylsalicylic Acid 100mg tabs

Available: 72553 Tablets

Issue: Tablets

| Batch | Expiry | Location | Pack sell price | Pack Size | In Store (packs) | Available (packs) | Packs Issued | Tablets Issued | On Hold |
|-----------------------|------------|----------|-----------------|-----------|------------------|-------------------|--------------|----------------|---------|
| arr214 | 31/12/2020 | SA | \$0.05 | 20 | 98 | 98 | 0 | 0 | |
| ✓ abg414 | 31/08/2025 | SA | \$0.05 | 100 | 57 | 57 | 0 | 0 | |
| ✓ ser421 | 30/11/2025 | SA | \$0.10 | 1 | 2 | 2 | 0 | 0 | |
| ✓ asfs3432 | 31/12/2025 | SA | \$0.03 | 100 | 20 | 19 | 0 | 0 | |
| ✓ asfs3432 | 31/12/2025 | SA | \$0.03 | 1 | 100 | 100 | 0 | 0 | |
| ✓ arr214 | 30/12/2020 | SA | \$0.05 | 1 | 98 | 98 | 0 | 0 | |
| Total quantity | | | | | | | | 100 | |

You can also see details to help make your decision, including **cautionary expiry dates** (3) and **amount needed to allocate** (4).

3. Red expiry dates

- These are dates of already expired stock lines or those expiring within the next 3 months. Avoid allocating these unless urgently needed or policy allows.

4. Total Quantity

- This shows the total quantity that needs to be allocated across all batches based on the requisition.

Once you have entered the quantity to issue, the "**Tablets Issued**" column will update automatically. When the total **Tablets Issued** matches the "Total quantity" at the bottom of the screen, it confirms that you've fully allocated the amount requested in the requisition.

*In this example, we selected to issue **Packs of 100 (1)**. The system auto-allocated 1 pack from the first eligible ticked batch, which is not expired. As a result, the **Tablets Issued shows 100 (2)**, matching the **Total quantity (3)** – confirming that the full requested amount has been allocated.*

Quick Allocation

Sometimes you already know your stock is up to date, there's enough on hand to cover the request, and you want the system to allocate quickly and accurately using FEFO. In these cases, instead of manually allocating each line, you can simply tick the items and click **“Allocate placeholder lines.”**

This tells the system to automatically fill in the requested quantities using the oldest available stock, saving you time and ensuring you're still following best practice for batch selection. It's a fast, reliable option when you are confident the stock in your system reflects what's physically in your store.

Once you've allocated all the stock, select **Confirm Allocated**.

At this point, the stock is deducted from your **available** stock on hand.

Outbound Shipments / 48

Add Item

Add from master list

Print

More

Customer Name: Health Clinic

Customer Reference: From internal order 44

Group by Item

Details

Log

| <input type="checkbox"/> | Code | Name [△] | Batch | Expiry | Location | Unit | Pack Size | Pack Qty [○] | Unit Qty [○] | Unit Sell Price |
|--------------------------|--------|------------------------------------|--------|------------|----------|--------|-----------|-----------------------|-----------------------|-----------------|
| <input type="checkbox"/> | 030063 | Acetylsalicylic Acid 100mg tabs | abg414 | 31/08/2025 | SA | Tablet | 100 | 1 | 100 | < \$0.01 |
| <input type="checkbox"/> | 030453 | Amoxicillin 250mg tabs | feg134 | 31/12/2028 | SB | Tab | 100 | 1 | 100 | \$0.04... |
| <input type="checkbox"/> | 201116 | Bandage W.O.W. 15cm wide x 5m roll | gre414 | 31/05/2029 | SB | Roll | 1 | 20 | 20 | \$0.35 |

☐ Hold

New > Allocated > Picked > Shipped > Delivered > Verified

Close

Confirm Allocated

District Warehouse

Edit

lousa

English

Important: As soon as a batch is allocated (whether manually or automatically), that quantity is immediately reserved and removed from the store's available stock, even before you select **Confirm Allocated**. This prevents the same stock from being accidentally used or allocated to another shipment at the same time.

Picking and Packing

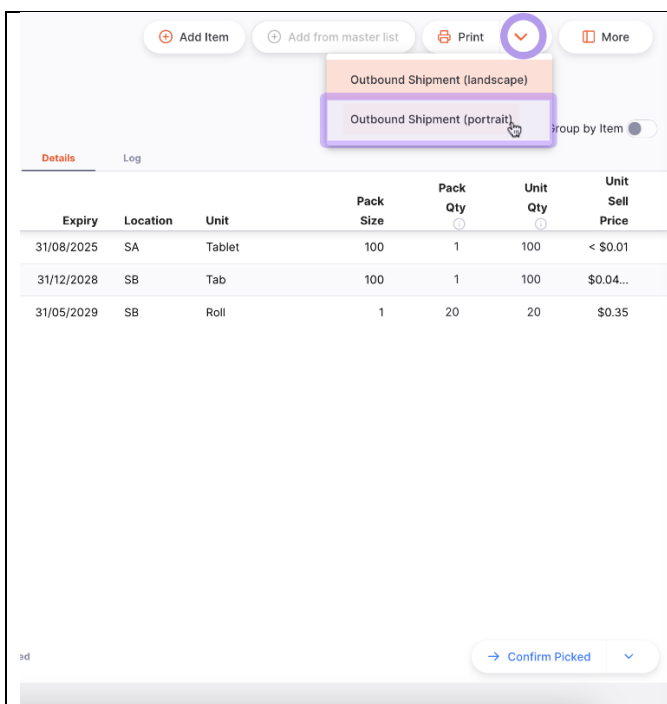
Once stock has been allocated, the next step is to physically pick the items from the shelves and pack them for delivery. This task is usually carried out by warehouse staff or the designated picker/packer. In larger settings, the allocation is done first (usually by a supervisor or manager), and the picker uses a printed pick slip to locate and collect the right items. In smaller stores, the same person might allocate and pick the stock in one go. Either way, the goal is to ensure the correct items, batches, and quantities are picked and then packed for dispatch.

Print a Pick Slip (Optional)

If you want to generate a paper copy of what needs to be picked:

1. Select the **Print** button.
2. Choose **Outbound Shipment (portrait)**.
3. Save or print the pick slip and fill this in as you pick.

This pick slip includes batch, location, expiry, and quantity, and provides space to manually record how many units have actually been picked.



This is especially useful in workflows where you want a physical record to double-check accuracy before dispatch.

Open mSupply combines picking and packing into one stage. Once all the items have been picked and packed, return to the system and select the **Confirm Picked** button to mark this stage as complete.

Note: Once you have selected "**Confirm Picked**" for the shipment, the stock will not show up in stocktakes as it is assumed to have already been removed from the shelf and is on its way out.

Shipping the Delivery

When the items physically leave your store or warehouse, select **Confirm Shipped** to mark the shipment as sent. This updates the shipment status and signals to the customer store that the stock is in transit.

Once marked as **Shipped**, the customer can now receive the goods on their end and complete the process in their system.

Once the order has been marked as **Shipped**, the item lines can no longer be edited or changed. This ensures stock records remain accurate and traceable.

Print an Outbound Shipment Note

Once you are ready, you can also print an **Outbound Shipment Note** for documentation or transport purposes. This is done by selecting the print button, then "**Outbound Shipment (Landscape)**".

+

Add Item

+

Add from master list

Print

▼

Outbound Shipment (landscape)


Outbound Shipment (portrait)

Group

| action | Unit | Pack Size | Pack Qty | Unit Qty |
|--------|--------|-----------|----------|----------|
| | Tablet | 100 | 1 | 100 |
| | Tab | 100 | 1 | 100 |
| | Roll | 1 | 20 | 20 |

30/06/2025, 11:52

Outbound Shipments | Open mSupply



District Warehouse

Phone:

Email: districtwarehouse@opensupply.org

Outbound shipment

Customer:

Health Clinic

CHC

Number: 48

Their ref: From internal order 44

Printed date: 30/06/2025

Shipped date: 30/06/2025

| Item code | Item name | Quantity | Pack size | Batch | Expiry | Sell price | Cost price | Extension |
|-----------|------------------------------------|----------|-----------|--------|------------|------------|------------|-----------|
| 030063 | Acetylsalicylic Acid 100mg tabs | 1 | 100 | abg414 | 2025-08-31 | 0.05 | 0.05 | 0.05 |
| 030453 | Amoxicillin 250mg tabs | 1 | 100 | feg134 | 2028-12-31 | 4.4 | 4.7 | 4.4 |
| 201116 | Bandage W.O.W. 15cm wide x 5m roll | 20 | 1 | gre414 | 2029-05-31 | 0.35 | 0.35 | 7 |
| Total: | | | | | | | 11.45 | |

Page 1

<https://demo.opensupply.org/distribution/outbound-shipment/0197b59a-eba6-7323-96a9-7704fc1fb6a1?sort=itemName>

1/1

Example of an **Outbound Shipment (Landscape)** printout

Returning Stock From an Outbound Shipment

You may want to return stock, for example, if the customer rejected the shipment and it was returned. Returning stock moves it back into your available inventory **without altering the locked shipment**, maintaining both accuracy and traceability.

2

If you return stock directly from an Outbound Shipment, the return will automatically create a finalised **Customer Return** note in your system for your record and for audit purposes.

Customer Returns

Once you have marked the shipment as **Shipped**, your part is done, but the process still continues on the customer side.

- **Mark as Delivered:** When the shipment arrives at their facility, the customer opens the linked Inbound Shipment in their store and marks it as Delivered.
- **Mark as Verified:** After physically checking the boxes, quantities, and batch details, they confirm everything is correct by marking it as Verified.

- In your Outbound Shipment invoice, the status will update automatically:

First to "**Delivered**".

Then to "**Verified**".

- You can track these changes even after you've already shipped the order.

This helps you confirm that the shipment was received successfully and without issues.