



# **Legacy mSupply**

Participants Guide

**MEBS Global Reach**

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# ***What is mSupply?***

## **What is an eLMIS?**

**eLMIS** stands for **Electronic Logistics Management Information System**.

It is a digital platform designed to manage and streamline healthcare supply chain operations, providing real-time visibility into inventory, orders, and distribution.

eLMIS is typically used to:

Track and manage stock levels of medicines, vaccines, and other health commodities.

Generate reports to support decision-making and forecasting.

Facilitate the ordering and distribution processes to ensure the right products are delivered to the right locations.

## **What is mSupply?**

mSupply is an eLMIS designed to support healthcare supply chain management.

Its key purpose is to ensure:

- Availability of essential medicines.
- Efficient inventory management.
- Accurate data-driven decision-making.

## **Key Features**

mSupply offers many powerful features, from logistics management and program coordination to dispensing and cold chain monitoring. For now, we will focus on some of the essential tools you will be using to manage healthcare supply chains:

- **Inventory Management**

Easily track stock levels, batches, and expiry dates to make sure medical supplies are used efficiently.

- **Order Management**

Learn how to handle orders, requisitions, and shipments smoothly and without hassle.

- Other features, such as reporting, dispensing, cold chain, advanced analytics, tender management, and program-specific workflows, will be covered in additional courses, enabling you to fully leverage the capabilities of mSupply.

## **Why should data be recorded on mSupply?**

- Accurate and timely data entry into mSupply is essential for managing healthcare supply chains effectively.
- Recording data ensures that inventory, orders, and distribution are tracked in real time, enabling better decision-making and resource management.

## **Benefits of Recording Data in mSupply**

### **1. Improves Stock Accuracy**

Real-time tracking helps avoid stockouts and overstocking by providing an up-to-date view of inventory levels

### **2. Reduces Waste**

Monitoring expiry dates ensures that supplies are used efficiently, minimizing waste and reducing costs.

### **3. Supports Better Planning**

Reliable data helps forecast needs, plan procurement, and schedule distributions more effectively.

### **4. Enhances Accountability**

Detailed records make it easier to track orders, shipments, and usage, ensuring transparency and accountability.

### **5. Increases Efficiency**

Automated processes reduce manual effort, saving time and improving accuracy.

### Why It Matters

Without accurate data, healthcare supply chains can face delays, stock imbalances, and wasted resources. By recording data into mSupply, organizations can ensure they have the right supplies in the right place at the right time, improving overall healthcare outcomes.

### Case Example

A regional health center is responsible for managing vaccines for several smaller clinics.

One month, a staff member forgets to record the stock levels and expiry dates of a large vaccine shipment into mSupply.

As a result, the following issues arise:

- **Stock Imbalance**

Since the shipment wasn't recorded, mSupply shows lower stock levels than what is actually in storage. Extra vaccines are ordered unnecessarily, leading to overstocking.

- **Missed Expiry Alerts**

Without the expiry dates entered, mSupply cannot show at-risk vaccines. Some of the doses expire unnoticed and are discovered only when trying to be used, leading to wastage.

- **Distribution Delays**

Late orders and running out of stock result in clinics being unable to access vaccines on time. This delays immunization programs and puts patients at risk of preventable diseases.

- **Lack of Accountability**

During an audit, discrepancies between the physical stock and system records raise concerns. The health center struggles to explain the overstock and wasted vaccines, damaging trust and accountability.

**Lesson Learned:** By failing to record the data in mSupply, the health center experienced financial losses, wasted resources, and a disruption in critical healthcare services. They have learned that accurate data recording can prevent these issues, ensuring smooth healthcare operations and better outcomes.

### Scenario Activity

You are the inventory manager for a district hospital. A routine stock audit reveals a discrepancy: the system shows 500 doses of a vaccine, but only 300 are in the cold storage room. An urgent vaccination campaign is scheduled for tomorrow, and the supply shortage puts the program at risk.

Navigate the situation by making key decisions. Your choices will impact the outcome of the vaccination campaign:

#### Question 1

1. What will you do first in the scenario described above?
  - a) Assume it's a theft issue and report it immediately.
  - b) Check if the missing stock was recorded incorrectly.
  - c) Contact the supplier to confirm recent deliveries.

#### Question 2

2. How will you respond to the vaccine team?
  - a) Inform the team of the shortage and delay the campaign.
  - b) Use mSupply to search for other facilities who have been sent stock recently and request a transfer.
  - c) Order additional vaccines, knowing they will arrive too late.

#### Question 3

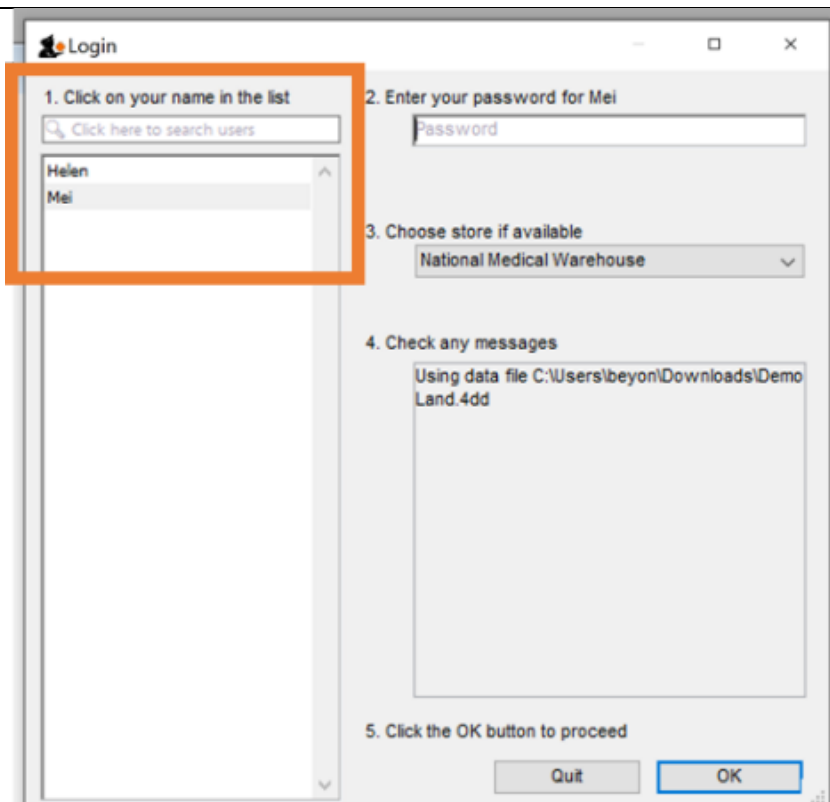
3. How will you prevent similar errors from occurring again in the future? Select all that apply.
  - a) Implement regular ordering to ensure stock will not run out.
  - b) Schedule a training session on data entry for all staff.
  - c) Rely on team experience to catch errors in the future.

***Legacy Level 1***

## Session 1.1 Logging into mSupply

After opening mSupply, you will need to log in.

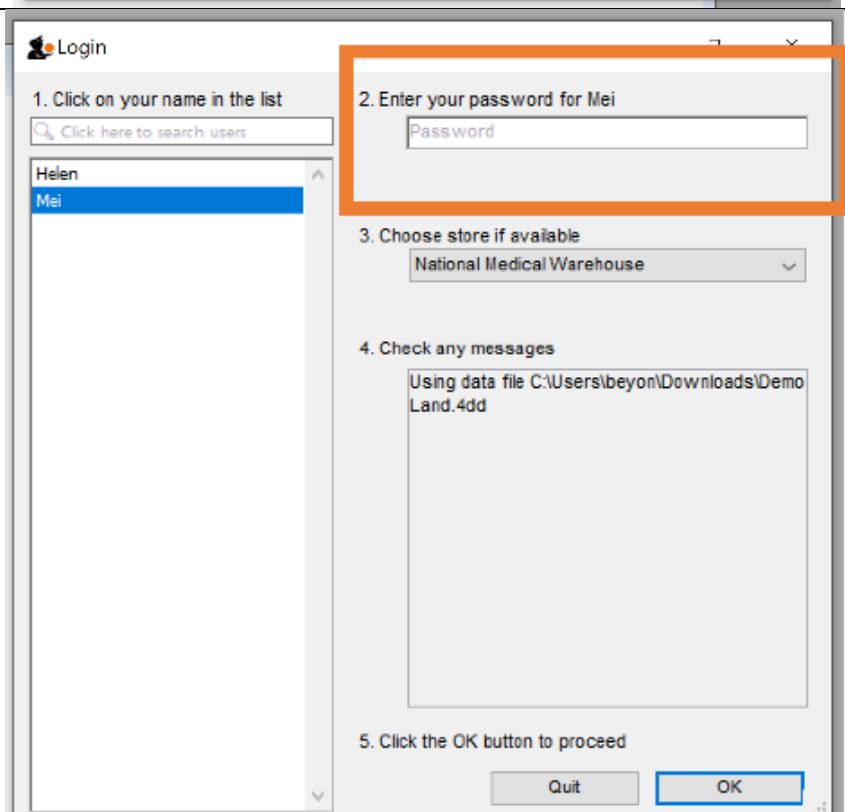
1. First, select your username



The screenshot shows the 'Login' window with the following elements:

- 1. Click on your name in the list:** A search box labeled 'Click here to search users' and a list containing 'Helen' and 'Mei'. An orange box highlights the list.
- 2. Enter your password for Mei:** A password input field labeled 'Password'.
- 3. Choose store if available:** A dropdown menu showing 'National Medical Warehouse'.
- 4. Check any messages:** A text area displaying 'Using data file C:\Users\beyon\Downloads\Demo Land.4dd'.
- 5. Click the OK button to proceed:** 'Quit' and 'OK' buttons at the bottom right.

2. Enter your password



The screenshot shows the 'Login' window with the following elements:

- 1. Click on your name in the list:** A search box labeled 'Click here to search users' and a list containing 'Helen' and 'Mei'. 'Mei' is highlighted in blue.
- 2. Enter your password for Mei:** A password input field labeled 'Password'. An orange box highlights this field.
- 3. Choose store if available:** A dropdown menu showing 'National Medical Warehouse'.
- 4. Check any messages:** A text area displaying 'Using data file C:\Users\beyon\Downloads\Demo Land.4dd'.
- 5. Click the OK button to proceed:** 'Quit' and 'OK' buttons at the bottom right.

3. Select the store you would like to work in

4. Click **OK**

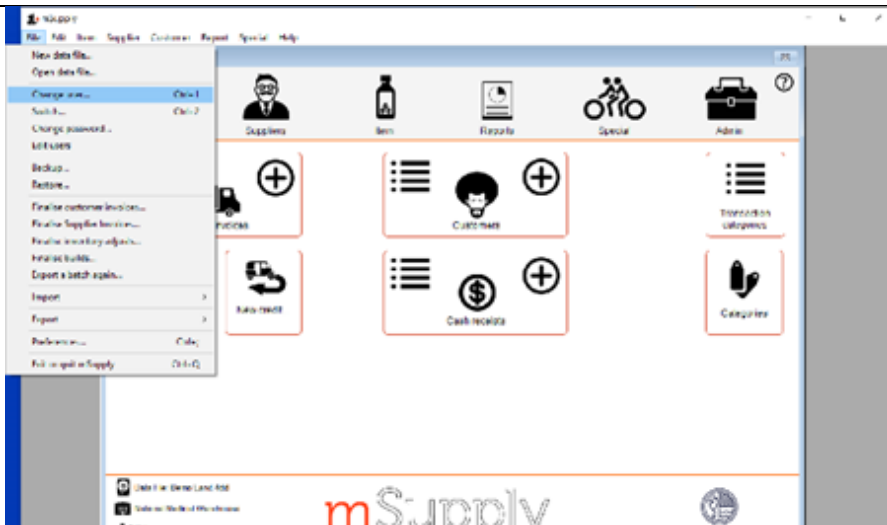
**You are now logged in!**

You should see your name at the bottom left corner!

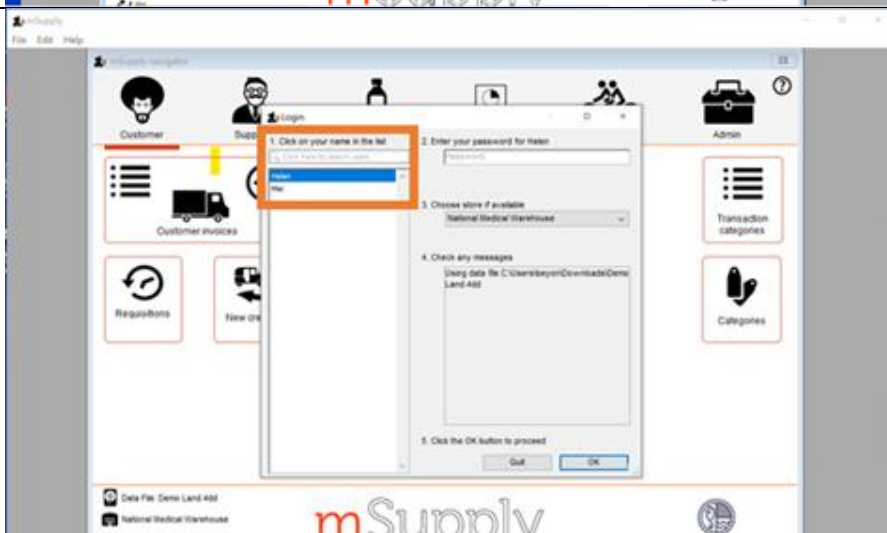
## Session 1.2 Changing Users

It is important that you log in with your own username when using mSupply.

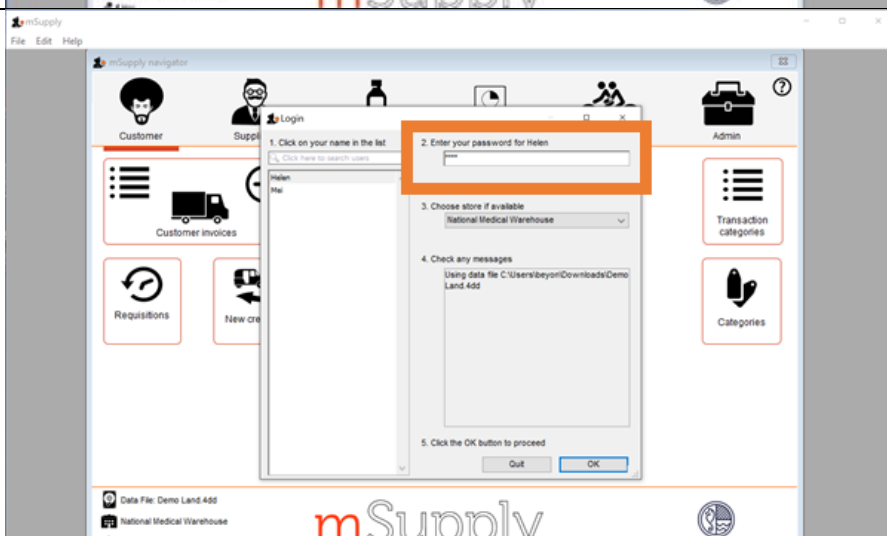
1. Go to **File** and click **Change user**



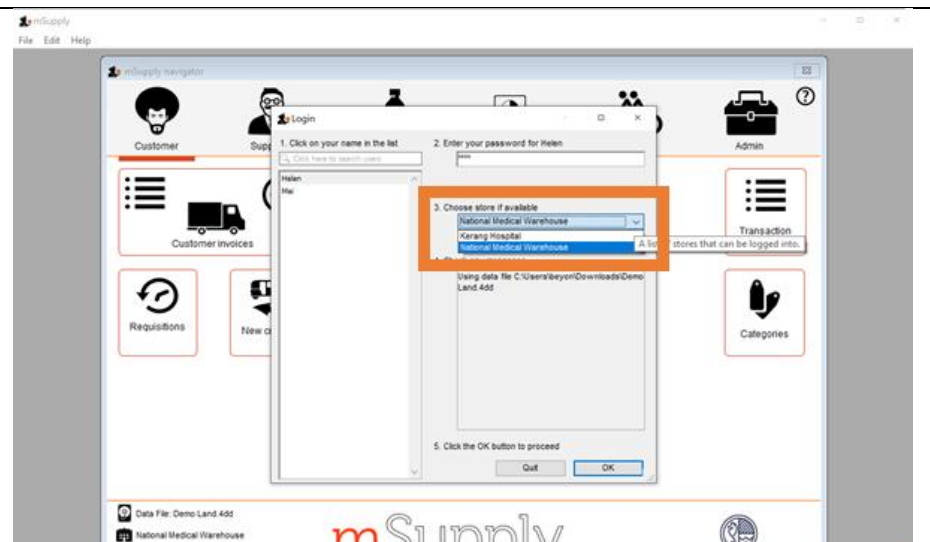
2. Select the name of the new user



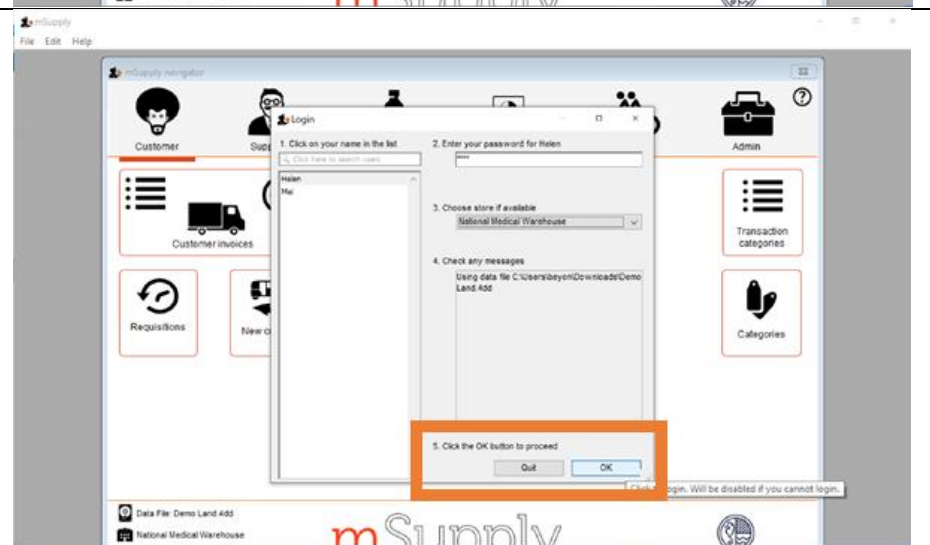
3. Enter the password



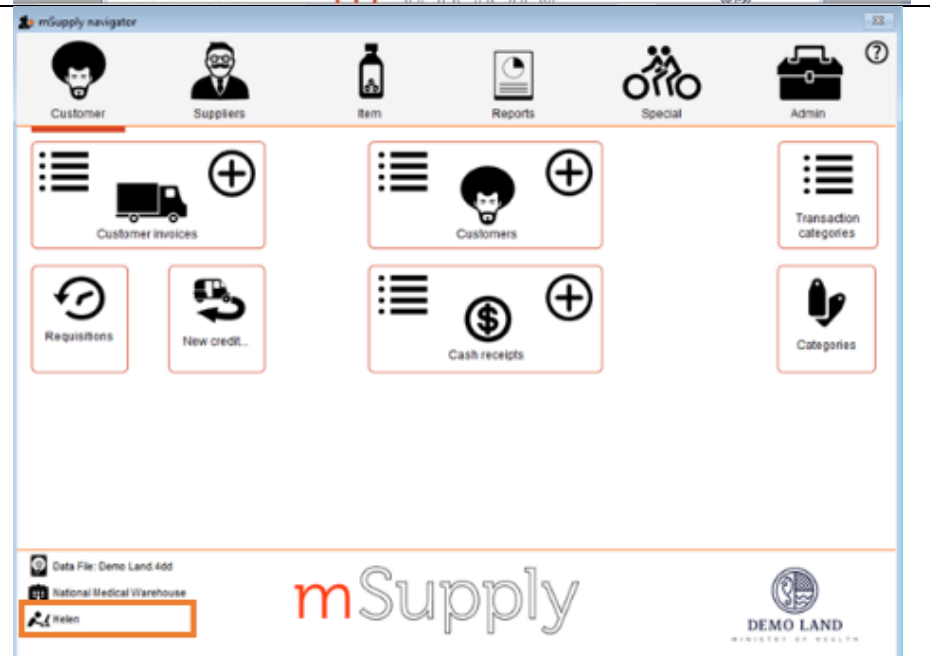
4. Select the store you want to work in



5. Click OK



Remember that you can see who is logged in by looking at the bottom left corner!



## Session 1.3 Switching Stores

A store is any entity using mSupply.

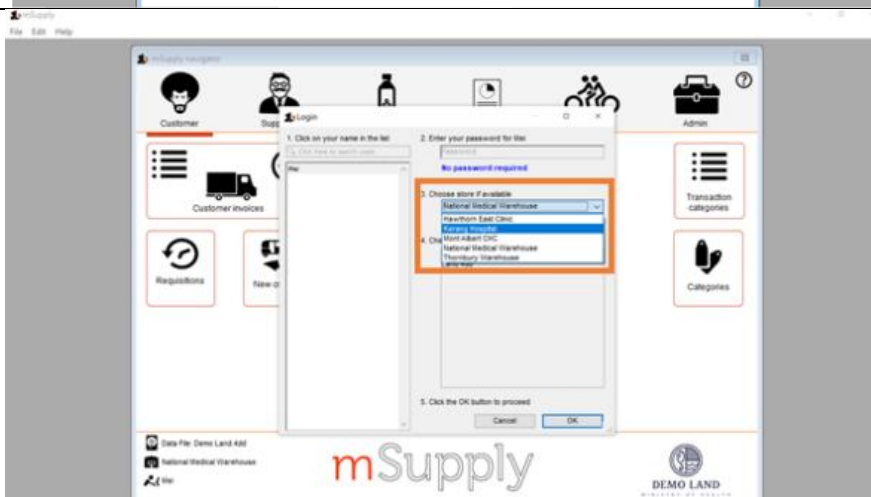
You must always ensure that you are logged into the correct store whenever you are on the mSupply.

If you have access to multiple stores, then you will need to switch between stores.

1. Go to the **File** and click **Switch**



2. Select the store you would like to log into



3. Click **OK**





**You have switched stores!**  
You can see the store you are logged into by looking at the bottom left corner.



## Session 1.4 Transaction Status

Each invoice in mSupply is associated with a Transaction Status which tells you:

- Whether it is still editable
  - Whether stock levels have been updated in mSupply
- ❖ A Finalised invoice is truly final and cannot be edited.
  - ❖ Only Finalise a transaction when you are absolutely sure it is correct!

### 1. New (nw)

Transaction has just been created and can still be edited.  
Stock has not been updated in mSupply.

### 2. Suggested (sg)

Transaction has been opened since first creation and can still be edited.  
Stock has not been updated in mSupply.

**3. Confirmed (cn)**  
Stock has been updated in mSupply but transaction can still be edited.

Name	Type	Entered	Confirmed	Innum	Total	Their ref	Pickslip pr.	Comment	Export
Bird, Ben	cn	10/02/21	10/02/21	10	0				0
Chalmers, Susan	fn	5/02/2021	5/02/2021	9	0				0
Sheil, Tom	fn	5/02/2021	5/02/2021	6	0				0
Sheil, Tom	fn	5/02/2021	5/02/2021	5	0				0
Sheil, Tom	fn	5/02/2021	5/02/2021	4	0				0
Bird, Ben	fn	5/02/2021	5/02/2021	3	0				0
Sheil, Tom	fn	5/02/2021	5/02/2021	2	0				0
Bird, Ben	fn	5/02/2021	5/02/2021	1	0				0

**4. Finalised (fn)**  
Stock has been updated in mSupply and transaction can no longer be edited.

ID	Name	Program	Date entered	Order date	Status	Comment
7	National Medical Warehouse		10/02/2021	10/02/2021	fn	
6	National Medical Warehouse		10/02/2021	10/02/2021	fn	
3	National Medical Warehouse	Tuberculosis (TB) Program	4/02/2021	4/02/2021	fn	

## Session 1.5 Navigation Tabs

The main mSupply screen is called the Navigator.  
There are six Navigation Tabs.

### 1. Customers (or Patients)

This tab is used for transactions with your customers.

Here you can:

- View and process requests from customers
- Send items to customers
- Process payments from customers

If your facility dispenses directly to patients, the Customer tab is replaced by the patients tab. This has the same functions as the Customer tab with the added ability to dispense prescriptions to patients.

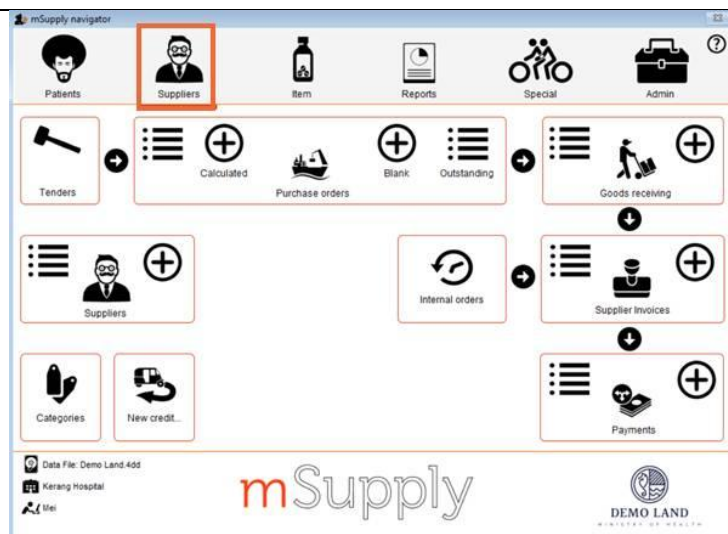


### 2. Suppliers

This tab is used for transactions with your Suppliers.

Here you can:

- Order and receive stock from suppliers
- Record payments to your suppliers
- Perform procurement functions such as running a tender



### 3. Items

This is where you manage products within your store.

Here you can:

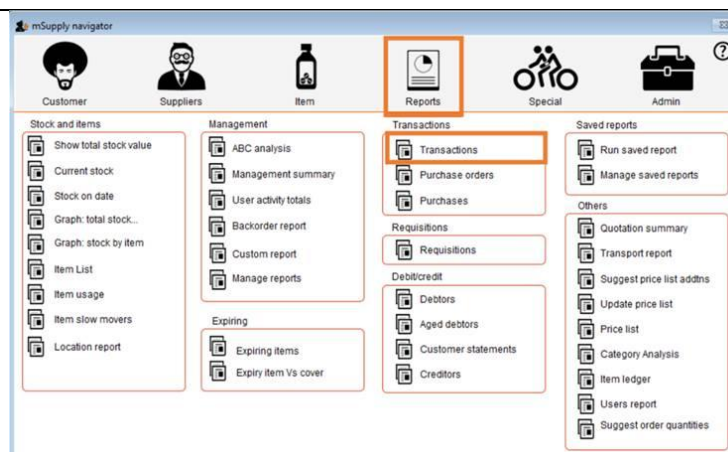
- View your current stock on hand
- Move stock within your store
- Perform Stocktakes and Inventory Adjustments
- Manufacture items from existing items
- Repack items into smaller or larger pack sizes



#### 4. Reports

Detailed data points are recorded every time an item is issued, received, transferred, removed or dispensed in mSupply.

There are more than 30 standard reports built into mSupply that can turn data into practical information for local decision-making, budget planning, and policy development.



#### 5. Special

Functions in this tab are usually reserved for users with administrative permissions.

Here you can:

- Modify individual Store Preferences
- Add/edit currencies
- Add/edit abbreviations for dispensing prescriptions
- View the Cash Register, where mSupply records all incoming and outgoing cash transactions



#### 6. Admin

Functions in this tab are usually reserved for users with administrative permissions.

Here you can:

- Add/edit users
- Set permissions for specific users or groups
- Update system-wide preferences
- Run a manual backup of data



## Session 1.6 Viewing Curent Stock On Hand

It is important to know how much stock you currently have on hand.

You might also be asked if a particular item is in stock, and you can check this easily in mSupply.

The information on mSupply is only as good as your data entry. To ensure your stock always matches what is on your shelves, you must record a transaction in mSupply every time stock enters or leaves your facility.

However mistakes or omissions can happen. You can correct your stock levels in mSupply by doing a Stocktake or an Inventory Adjustment.

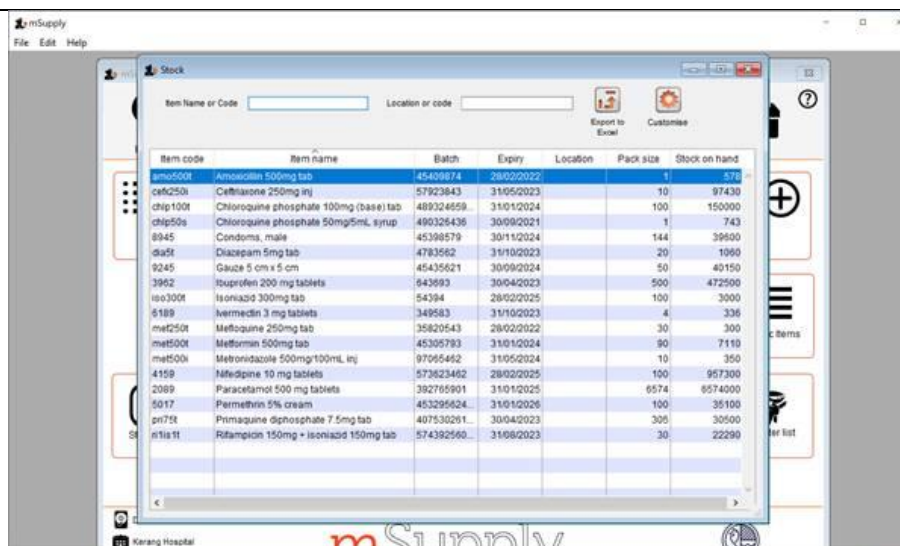
1. Navigate to the Item tab



2. Click the **Stock** button



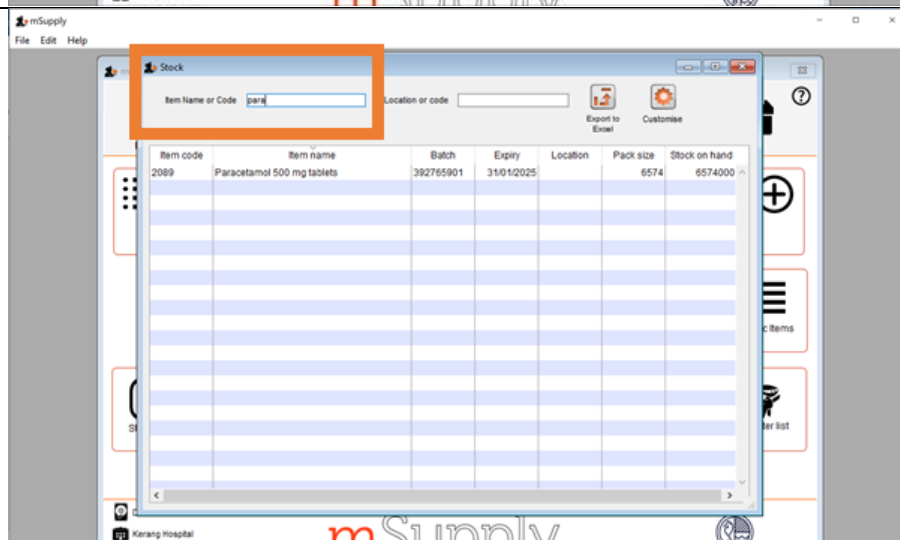
All items in stock are shown, including **Stock on Hand**, **Pack size**, **Batch**, **Expiry**, and **Location**.



The screenshot shows the 'Stock' window in the mSupply application. It displays a table with the following columns: Item code, Item name, Batch, Expiry, Location, Pack size, and Stock on hand. The table lists various medical supplies, including Amoxicillin, Ceftriaxone, Chloroquine, Condoms, Diazepam, Gauze, Ibuprofen, Isoniazid, Ivermectin, Metformin, Metronidazole, Mefenopine, Paracetamol, Permethrin, Primaquine, and Rifampicin.

Item code	Item name	Batch	Expiry	Location	Pack size	Stock on hand
amo500t	Amoxicillin 500mg tab	145409874	28/02/2022		1	579
cef250i	Ceftriaxone 250mg inj	57923843	31/05/2023		10	97430
chip100t	Chloroquine phosphate 100mg (base) tab	489324658	31/01/2024		100	150000
chip50s	Chloroquine phosphate 50mg/5mL syrup	490326436	30/09/2021		1	743
8945	Condoms, male	45398579	30/11/2024		144	39600
dia5t	Diazepam 5mg tab	4783562	31/10/2023		20	1060
9245	Gauze 5 cm x 5 cm	45435621	30/09/2024		50	40150
3962	Ibuprofen 200 mg tablets	643693	30/04/2023		500	472500
iso300t	Isoniazid 300mg tab	54394	28/02/2025		100	3000
5189	Ivermectin 3 mg tablets	349583	31/10/2023		4	336
met250t	Metformin 250mg tab	35820543	28/02/2022		30	300
met500t	Metformin 500mg tab	45305793	31/01/2024		90	7110
met500i	Metronidazole 500mg/100mL inj	97055462	31/05/2024		10	350
4159	Mefenopine 10 mg tablets	573623462	28/02/2025		100	967300
2089	Paracetamol 500 mg tablets	392765901	31/01/2025		6574	6574000
5017	Permethrin 5% cream	453295624	31/01/2026		100	35100
pr178	Primaquine diphosphate 7.5mg tab	407530261	30/04/2023		305	30500
ri1181t	Rifampicin 150mg + isoniazid 150mg tab	574392560	31/08/2023		30	22290

**Tip**  
You can search for a specific item by typing the first few letters of the item name or code



The screenshot shows the 'Stock' window in the mSupply application with a search filter applied. The 'Item Name or Code' field is highlighted with an orange box and contains the text 'para'. The table below shows the results of the search, displaying only the Paracetamol 500 mg tablets item.

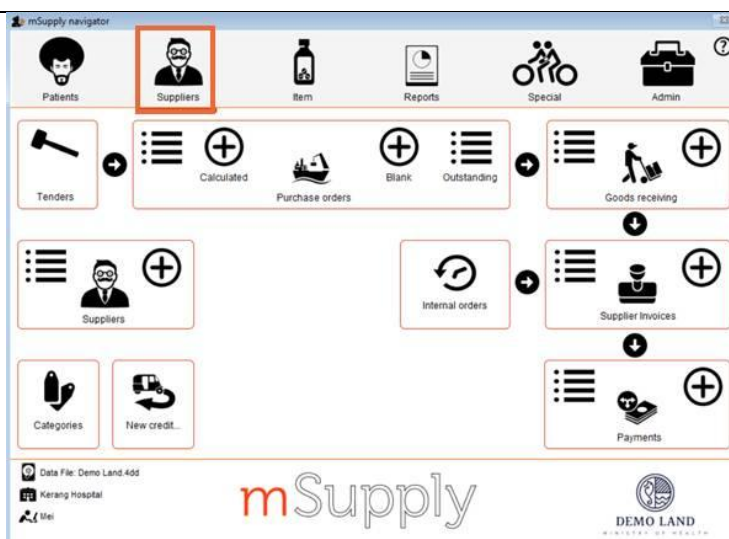
Item code	Item name	Batch	Expiry	Location	Pack size	Stock on hand
2089	Paracetamol 500 mg tablets	392765901	31/01/2025		6574	6574000

## Session 1.7 Internal Orders (General)

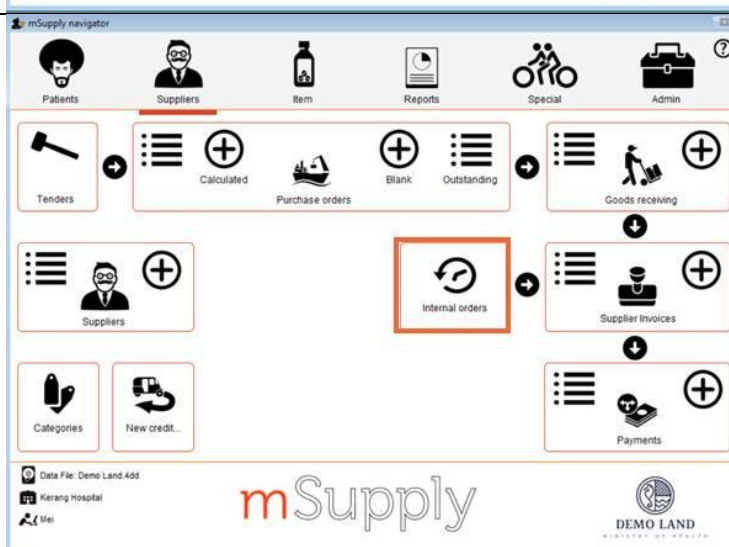
Internal Orders are used to order stock from another store that uses mSupply (internal suppliers).

Examples of internal suppliers include a central warehouse or a second level medical store or zonal store. Most facilities order stock from another facility higher up in the local supply chain.

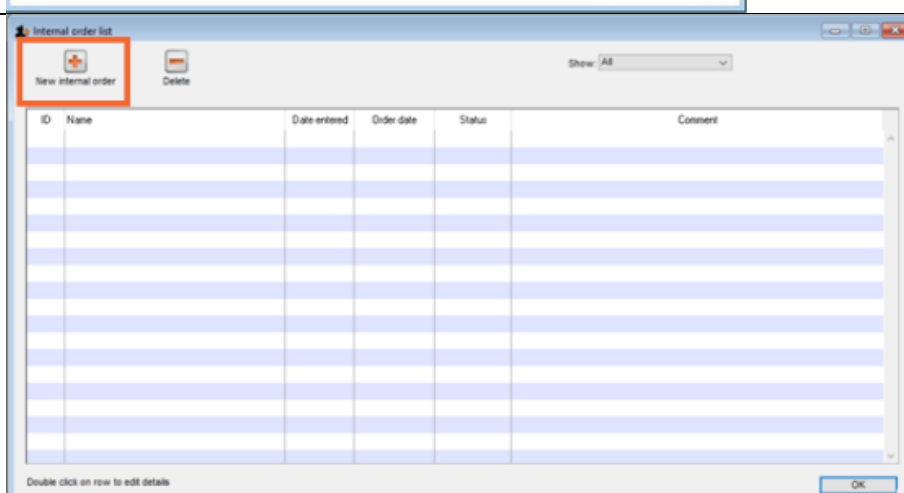
1. Navigate to the **Suppliers** tab



2. Click the **Internal orders** button



3. Click the **New internal order** button

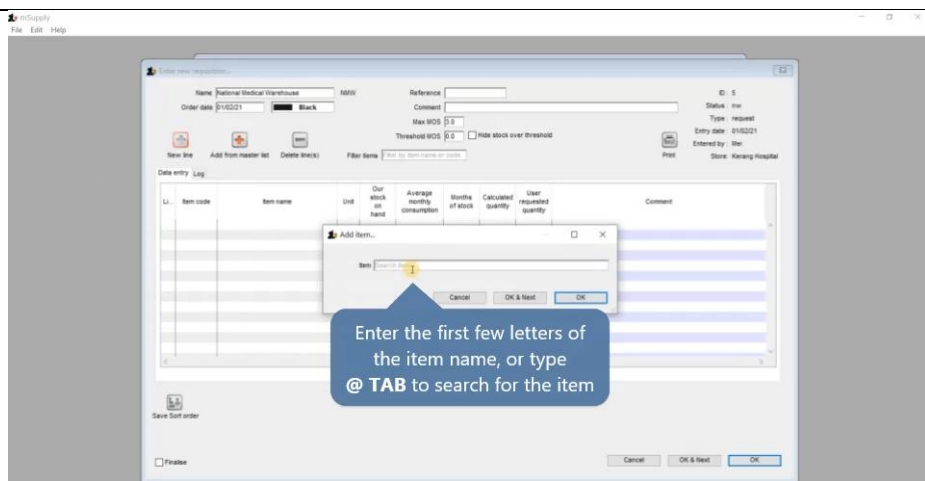




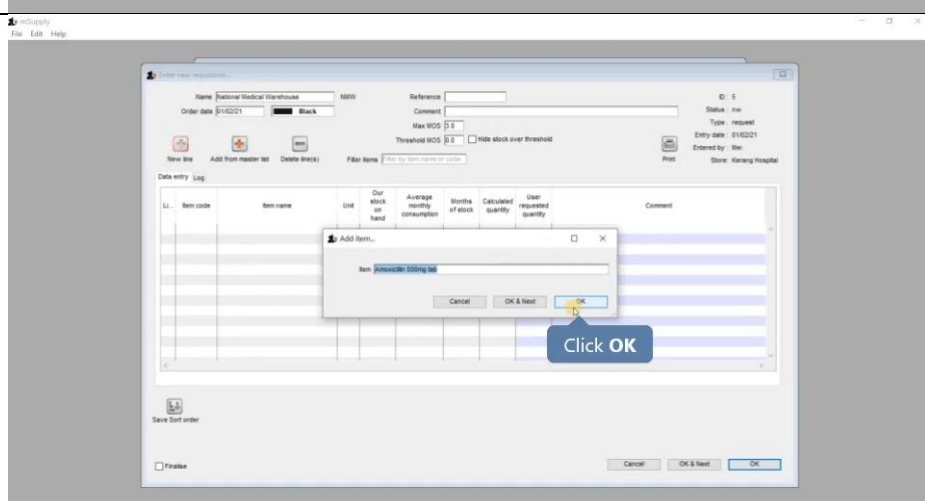
- 5. A new requisition has been created!**

6. Click **New line**

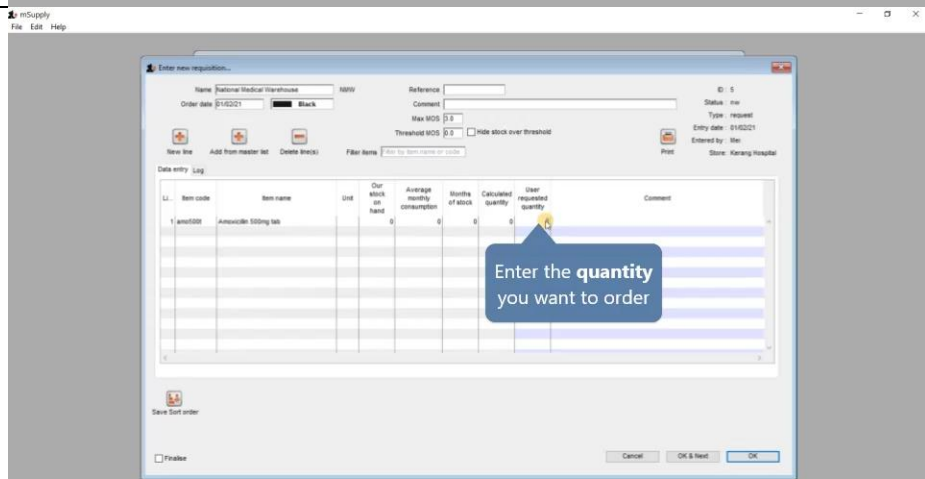
7. Enter the first few letters of the item name, or type @ TAB to search for the item



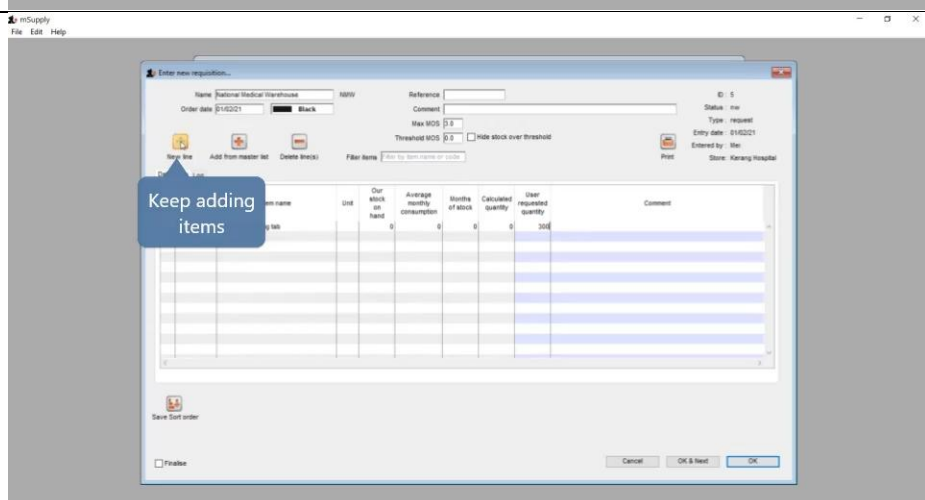
8. Click OK



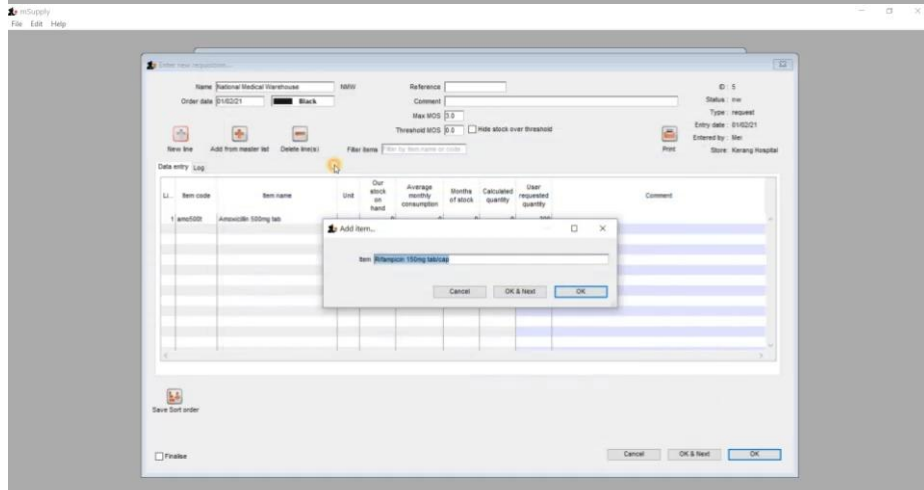
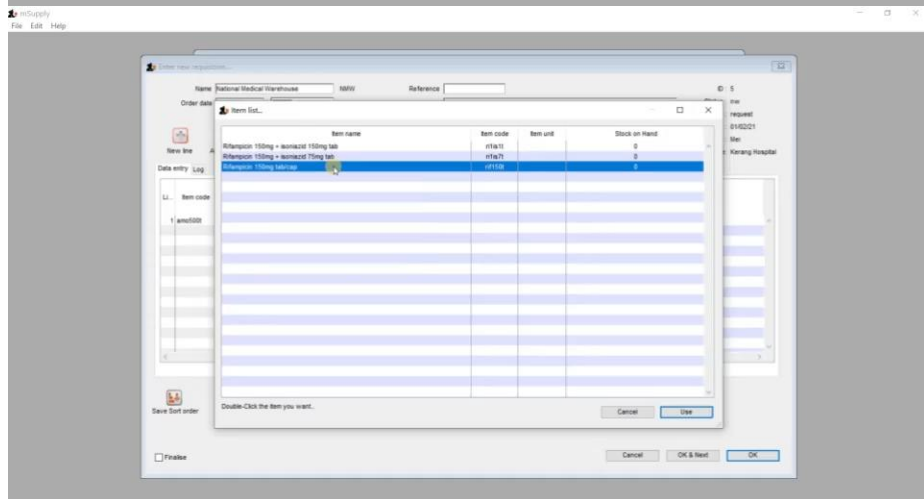
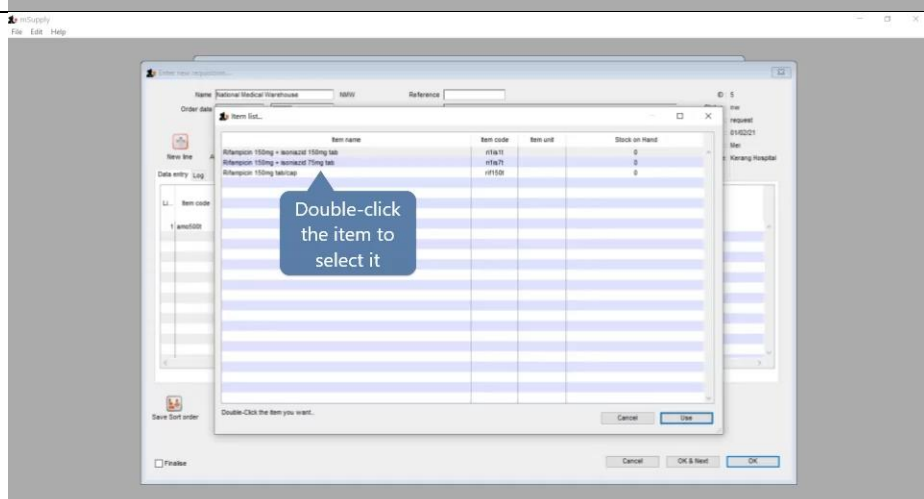
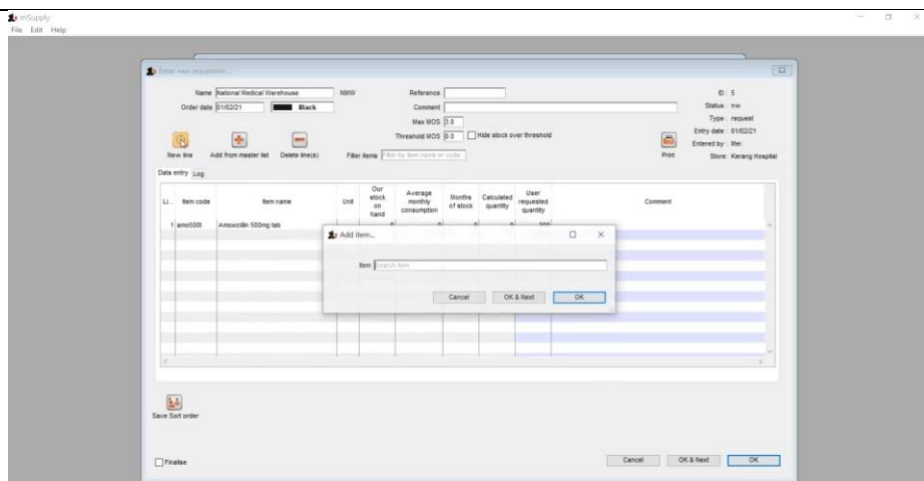
9. Enter the **quantity** you want to order



10. Keep adding items. Click **OK**



11. Double click the item to select it. Click **OK**



12. Enter the **quantity** you want to order

The screenshots show the 'Enter new requisition' window in mSupply. The top screenshot highlights the 'User requested quantity' column with a callout bubble. The bottom screenshot shows the following data entered:

LI	Item code	Item name	Unit	Our stock on hand	Average monthly consumption	Months of stock	Calculated quantity	User requested quantity	Comment
1	amc500t	Amoxicillin 500mg tab		0	0	0	0	100	
2	rfp150t	Rifampicin 150mg tab/cap		0	0	0	0	200	

### Calculated Quantity vs. User Requested Quantity

**Calculated Quantity** is the quantity mSupply recommends you should order based on your:

- Average monthly consumption (AMC)
- Stock on hand
- Months of stock
- Max MOS

**Calculated Quantity**

The **Calculated Quantity** is the quantity mSupply recommends you should order based on your:

- **Average monthly consumption (AMC):** quantity you use on average each month
- **Stock on hand:** quantity you currently have available
- **Months of stock:** how long your current stock will last based on your AMC
- **Max MOS:** the maximum Months of Stock you wish to keep (the calculated quantity will change if you adjust this field)

All this information is displayed for every item you add to the Internal order.

*You should review it carefully before finalising*

**User Requested Quantity** is what you actually want to order.

This is usually the same as the Calculated Quantity but you can change it if necessary.

**User Requested Quantity**

The **User Requested Quantity** is what you actually want to order.

Usually, this will be the same as the Calculated Quantity but you can change it if necessary (e.g. a recent disease outbreak).

The screenshot shows the 'Enter new requisition...' window. At the top, there are fields for Name (National Medical Warehouse), Order date (01/02/21), and a color selector (Black). A callout box highlights the 'User requested quantity' column in the table, which shows values of 300 and 200. The bottom of the window has buttons for 'Finalise', 'Cancel', 'OK & Next', and 'OK'.

13. Check the **Finalise** box, then click **OK**

The screenshot shows the 'Enter new requisition...' window with the 'Finalise' checkbox checked. The table below shows the requisition details:

LI.	Item code	Item name	Unit	Our stock on hand	Average monthly consumption	Months of stock	Calculated quantity	User requested quantity	Comment
1	ane0500	Amoxicillin 500mg tab		0	0	0	0	300	
2	rt150	Rifampicin 150mg tab/cap		0	0	0	0	200	

The 'Finalise' checkbox is checked, and the 'OK' button is highlighted.

14. Your order has now been sent to your supplier!

You can now review the order at any time by clicking the **Internal orders** button.

Remember that a transaction with a **Status** of **fn** is finalized and can no longer be edited.

The screenshot shows the 'Internal order list' window. It displays a table with the following data:

ID	Name	Date entered	Order date	Status	Comment
5	National Medical Warehouse	1/02/2021	1/02/2021	In	

The 'Status' is 'In'. The bottom of the window has a 'Double click on row to edit details' note and an 'OK' button.

## Session 1.8 Internal Orders (Program)

Certain items are ordered and managed separately to general stock.

These **programs** usually have strict schedules for ordering, and additional information may need to be provided to a supplier when requesting stock.

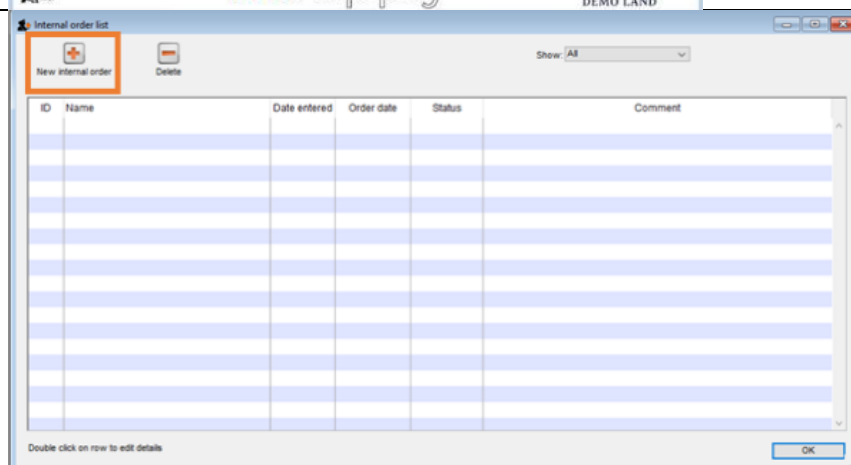
1. Navigate to the **Suppliers** tab

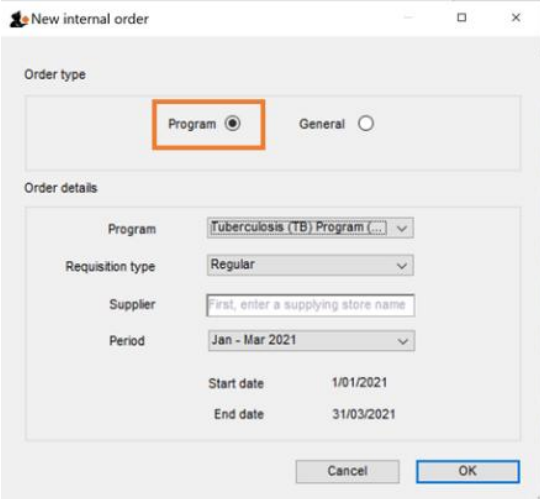
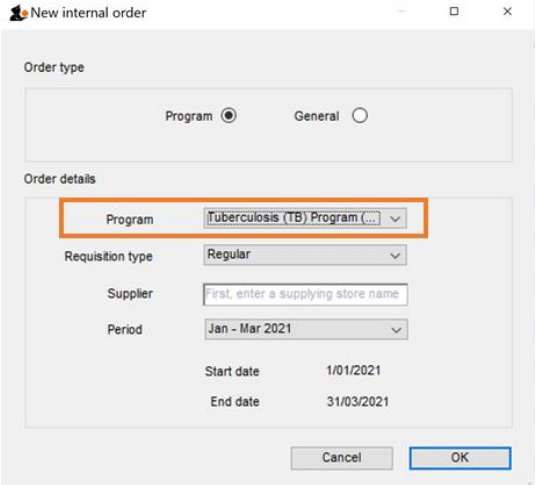
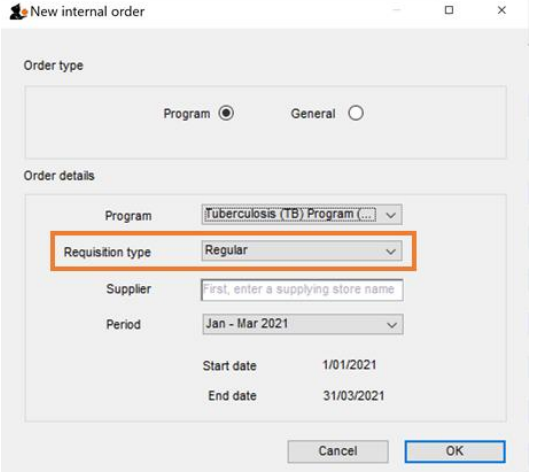


2. Click the **Internal orders** button



3. Click the **New internal order** button



<p>4. Select the <b>Program</b> button</p>	
<p>5. Select the relevant <b>Program</b> from the dropdown list</p>	
<p>6. Select the <b>Requisition type</b> from the dropdown list (usually either <b>Regular</b> or <b>Emergency</b>)</p>	

7. Enter the **Supplier** you wish to order stock from

New internal order

Order type

Program ☒ General ☐

Order details

Program Tuberculosis (TB) Program (...)

Requisition type Regular

Supplier National Medical Warehouse

Period Jan - Mar 2021

Start date 1/01/2021

End date 31/03/2021

Cancel OK

8. Select the **Period** for this order (the **Start date** and **End date** will update automatically based on this selection)

New internal order

Order type

Program ☒ General ☐

Order details

Program Tuberculosis (TB) Program (...)

Requisition type Regular

Supplier National Medical Warehouse

Period Jan - Mar 2021

Start date 1/01/2021

End date 31/03/2021

Cancel OK

9. A new requisition has been created!

Enter new requisition...

Supplier National Medical Warehouse

Order date 04/02/21

Program Tuberculosis (TB) Program

Order type Regular

Period Jan - Mar 2021

From 1/01/2021 To 31/03/2021

Reference

Comment

Max WOS 3.0

Threshold WOS 1.0

Hide stock over threshold

Filter items

ID: 2

Status: nw

Type: request

Entry date: 04/02/21

Entered by: Mei

Store: Kerang Hospital

Data entry Log Indicators

LI	Item code	Item name	Unit	Our stock on hand	Average monthly consumption	Months of stock	Calculated quantity	User requested quantity	Reason	Comment
1	iso300t	Isoniazid 300mg tab		3000	0	0	0	0		
2	rr150t	Rifampicin 150mg tab/cap		0	0	0	0	0		
3	rr150t	Rifampicin 150mg + isoniazid 150mg tab		22290	0	0	0	0		
4	rr150t	Rifampicin 150mg + isoniazid 75mg tab		0	0	0	0	0		

Save Sort order

Finalise

Cancel OK & Next OK

### How Program orders differ from General orders

- ❖ Items are restricted and are automatically added. There is no **New Line** button.
- ❖ The **Indicators** tab allows your supplier to capture specific data related to the program.
- ❖ Order schedules are restricted as only one program order can be placed per period. Emergencies will require emergency orders.



- ❖ Items are restricted and are automatically added. There is no **New Line** button.

Supplier: National Medical Warehouse NMW Reference: ID: 2  
 Order date: 04/02/21 Black Status: new  
 Program: Tuberculosis (TB) Program Comment: Type: request  
 Order type: Regular Max HOS: 0.0 Entry date: 04/02/21  
 Period: Jan - Mar 2021 Threshold HOS: 0.0 Hide stock over threshold Entered by: Mei  
 From: 10/1/2021 To: 31/03/2021 Filter items: Store: Kerang Hospital

Data entry Log Indicators

LI	Item code	Item name	Unit	Our stock on hand	Average monthly consumption	Months of stock	Calculated quantity	User requested quantity	Reason	Comment
1	iso300t	isoniazid 300mg tab		3666	0	0	0	0		
2	rt150t	Rifampicin 150mg tab/cap		0	0	0	0	0		
3	rt150t	Rifampicin 150mg + isoniazid 150mg tab		22296	0	0	0	0		
4	rt150t	Rifampicin 150mg + isoniazid 75mg tab		0	0	0	0	0		

Save Sort order

☐ Finalise

Cancel OK & Next OK

- ❖ The **Indicators** tab allows your supplier to capture specific data related to the program.

Supplier: National Medical Warehouse NMW Reference: ID: 2  
 Order date: 04/02/21 Black Status: new  
 Program: Tuberculosis (TB) Program Comment: Type: request  
 Order type: Regular Max HOS: 0.0 Entry date: 04/02/21  
 Period: Jan - Mar 2021 Threshold HOS: 0.0 Hide stock over threshold Entered by: Mei  
 From: 10/1/2021 To: 31/03/2021 Filter items: Store: Kerang Hospital

Data entry Log Indicators

LI	Item code	Item name	Unit	Our stock on hand	Average monthly consumption	Months of stock	Calculated quantity	User requested quantity	Reason	Comment
1	iso300t	isoniazid 300mg tab		3666	0	0	0	0		
2	rt150t	Rifampicin 150mg tab/cap		0	0	0	0	0		
3	rt150t	Rifampicin 150mg + isoniazid 150mg tab		22296	0	0	0	0		
4	rt150t	Rifampicin 150mg + isoniazid 75mg tab		0	0	0	0	0		

Save Sort order

☐ Finalise

Cancel OK & Next OK

- ❖ Order schedules are restricted as only one program order can be placed per period. Emergencies will require emergency orders.

Supplier: National Medical Warehouse NMW Reference: ID: 2  
 Order date: 04/02/21 Black Status: new  
 Program: Tuberculosis (TB) Program Comment: Type: request  
 Order type: Regular Max HOS: 0.0 Entry date: 04/02/21  
 Period: Jan - Mar 2021 Threshold HOS: 0.0 Hide stock over threshold Entered by: Mei  
 From: 10/1/2021 To: 31/03/2021 Filter items: Store: Kerang Hospital

Data entry Log Indicators

LI	Item code	Item name	Unit	Our stock on hand	Average monthly consumption	Months of stock	Calculated quantity	User requested quantity	Reason	Comment
1	iso300t	isoniazid 300mg tab		3666	0	0	0	0		
2	rt150t	Rifampicin 150mg tab/cap		0	0	0	0	0		
3	rt150t	Rifampicin 150mg + isoniazid 150mg tab		22296	0	0	0	0		
4	rt150t	Rifampicin 150mg + isoniazid 75mg tab		0	0	0	0	0		

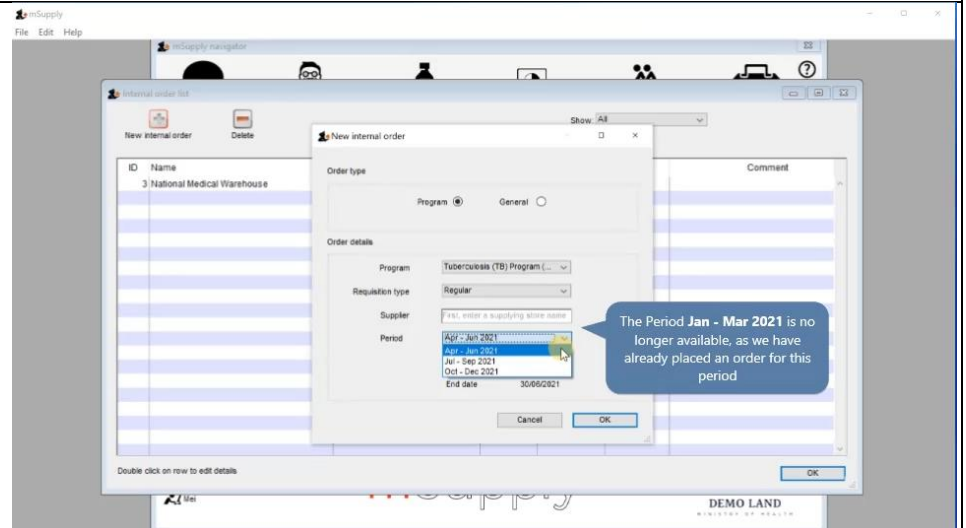
Save Sort order

☐ Finalise

Cancel OK & Next OK

**How are order schedules restricted?**  
**What happens if we try to place another order for the same period?**

The Period **Jan-Mar 2021** is no longer available, as we have already placed an order for this period.



## Session 1.9 Supplier Invoices

When we receive stock from a supplier, we need to enter this in mSupply.  
We do this by entering a Supplier invoice.

1. Navigate to the **Suppliers** tab



2. Click the **Supplier invoice list** button

When the supplier sends you your order, the invoice will be waiting in the list.



3. Click **Find** to show all your Supplier invoices

You can also search for a specific **Invoice Number** if you know it

Find transaction

Supplier transactions

15 most recent transactions, or:

Invoice Number equals

☐ Use list view if one entry found

Complex Find Cancel Find

4. Double click the Supplier invoice you want to open

Deliveries that have not yet been received will have a **new (nw)** status

Types	Name	Type	Status	Entered	Confirmed	Invoices	Total	Ther ref	Pickup print	Comment	Export
Customer invoices	National Medical Warehouse	si	nw	1/02/2021							
	National Medical Warehouse	si	in	1/02/2021	1/02/2021	1	550	From invoi...		Stock transfer (Invoic...	

5. The Supplier invoice has been opened!

Before accepting the stock, check that all item details entered are correct

Supplier Invoice

Name: National Medical Warehouse  
 Their ref: From invoice number: 2  
 Comment: Stock transfer (Invoice from requisition)

Confirm date: 05/05/05  
 Category: None  
 Donor:   
 Be aware: modifying this invoice will not change the customer invoice which generated this invoice in the sending store National Medical Warehouse

Invoice number: 2  
 Entry date: 01/02/2021  
 Status: nw  
 Goods received: 0  
 Purchase Order: 0  
 Requisition: 5  
 Entered by: NW  
 Store: Kerang Hospital

L.	Location	Item code	Item Name	Donor	Qty	Pack	Batch	Expiry	Cost Price	Sell Price	Price extension
1		rt150t	Ritampicin 150mg tab/cap		200	1	DGH48	31/05/2022	2.00	2.00	400.00
2		smo500t	Amoxicillin 500mg tab		300	1	FGH48	28/02/2026	0.50	0.50	150.00

Other charges:  
 Item(s):   
 Amount: 0.00

Subtotal: 550.00  
 0 % tax: 0.00  
 Total: 550.00

Export batch: 0  
 Margin: 0.00

OK & Next Delete OK

Let's look at these details...

1. **Store Name** tells you who sent the stock

Supplier Invoices

Supplier Invoice

Name: National Medical Warehouse  
 Their ref: From invoice number: 2  
 Comment: Stock transfer (Invoice from requisition)

Confirm date: 05/05/05  
 Category: None  
 Donor:   
 Be aware: modifying this invoice will not change the customer invoice which generated this invoice in the sending store National Medical Warehouse

Invoice number: 2  
 Entry date: 01/02/2021  
 Status: nw  
 Goods received: 0  
 Purchase Order: 0  
 Requisition: 5  
 Entered by: NW  
 Store: Kerang Hospital

L.	Location	Item code	Item Name	Donor	Qty	Pack	Batch	Expiry	Cost Price	Sell Price	Price extension
1		rt150t	Ritampicin 150mg tab/cap		200	1	DGH48	31/05/2022	2.00	2.00	400.00
2		smo500t	Amoxicillin 500mg tab		300	1	FGH48	28/02/2026	0.50	0.50	150.00

Other charges:  
 Item(s):   
 Amount: 0.00

Subtotal: 550.00  
 0 % tax: 0.00  
 Total: 550.00

Export batch: 0  
 Margin: 0.00

OK & Next Delete OK

**Store name**  
 This tells you who sent the stock

## 2. Comment

This will indicate if the Supplier invoice was generated from an Internal order you sent.

**Supplier Invoices**

**Supplier Invoice**

Name: National Medical Warehouse  
Their ref: From invoice number: 2  
Comment: (Stock transfer (invoice from requisition))

New line Add items from requisition Delete line

General Summary by Item Summary by Batch Print List

L	Location	Item code	Item Name	Qty	Unit Price	Price extension
1		41150	Rifampicin 150mg tab/cap	200	2.00	400.00
2		amc500	Amoxicillin 500mg tab	300	0.50	150.00

Other charges  
Basis: Amount: 0.00

Subtotal: 550.00  
0 % tax: 0.00  
Total: 550.00

Hold Finalize Export batch: 0 Margin: 0.00 OK & Next Delete OK

**Comment**  
If the Supplier invoice was generated from an Internal Order that you sent, this will be indicated in the Comment section

## 3. Requisition ID

This tells you which internal order the Supplier invoice originated from

You can click this ID number to open the original internal order, and compare it with what the Supplier sent you

**Supplier Invoices**

**Supplier Invoice**

Name: National Medical Warehouse  
Their ref: From invoice number: 2  
Comment: (Stock transfer (invoice from requisition))

New line Add items from requisition Delete line

General Summary by Item Summary by Batch Print List

L	Location	Item code	Item Name	Qty	Unit Price	Price extension
1		41150	Rifampicin 150mg tab/cap	200	2.00	400.00
2		amc500	Amoxicillin 500mg tab	300	0.50	150.00

Other charges  
Basis: Amount: 0.00

Subtotal: 550.00  
0 % tax: 0.00  
Total: 550.00

Hold Finalize Export batch: 0 Margin: 0.00 OK & Next Delete OK

**Requisition ID**  
This tells you which Internal order the Supplier invoice originated from  
You can click this ID number to open the original Internal order, and compare it with what the Supplier sent you

## 4. Invoice price

This is the total value of the stock received

**Supplier Invoices**

**Supplier Invoice**

Name: National Medical Warehouse  
Their ref: From invoice number: 2  
Comment: (Stock transfer (invoice from requisition))

New line Add items from requisition Delete line

General Summary by Item Summary by Batch Print List

L	Location	Item code	Item Name	Qty	Unit Price	Price extension
1		41150	Rifampicin 150mg tab/cap	200	2.00	400.00
2		amc500	Amoxicillin 500mg tab	300	0.50	150.00

Other charges  
Basis: Amount: 0.00

Subtotal: 550.00  
0 % tax: 0.00  
Total: 550.00

Hold Finalize Export batch: 0 Margin: 0.00 OK & Next Delete OK

**Invoice price**  
This is the total value of the stock received

**5. Other charges**  
e.g. transport.

This is optional and can be left blank

Any cost here will be added to the total value of the invoice

**Supplier invoices**

Supplier Invoice

Name: National Medical Warehouse

Confirm date: 00/00/00

Invoice number: 2

Entry date: 01/02/2021

Status: new

Category: None

Donor: [blank]

Comment: Stock transfer (invoice from requisition)

Be aware: modifying this invoice will not change the customer invoice which generated this invoice in the sending store National Medical Warehouse

Other charges

Item(s):

Amount: 0.00

Export batch: 0

Margin: 0.00

Hold

Finalise

**Other charges**

If necessary, you can record other charges for the invoice (e.g. transport)

This is optional and may be left blank

Any cost entered here will be added to the total value of the invoice

L	Location	Item code	Item Name	Donor	Qty	Pack	Batch	Expiry	Cost Price	Sell Price	Price extension
1		41501	Rilampicin 150mg tab/cap		200	1	DGH98	31/05/2022	2.00	2.00	400.00
2		am500	Amoxicillin 500mg tab		300	1	FGH89	28/02/2026	0.50	0.50	150.00

Subtotal: 550.00

g % tax: 0.00

Total: 550.00

**6. Items sent**

Here are the items the Supplier sent you

Carefully check the **Item name, Quantity, Pack size, Batch, Expiry...**

**Supplier invoices**

Supplier Invoice

Name: National Medical Warehouse

Confirm date: 00/00/00

Invoice number: 2

Entry date: 01/02/2021

Status: new

Category: None

Donor: [blank]

Comment: Stock transfer (invoice from requisition)

Be aware: modifying this invoice will not change the customer invoice which generated this invoice in the sending store National Medical Warehouse

Other charges

Item(s):

Amount: 0.00

Export batch: 0

Margin: 0.00

Hold

Finalise

**Items sent**

Here are the items that the Supplier sent you

Carefully check the **Item Name, Quantity, Pack Size, Batch, Expiry**

L	Location	Item code	Item Name	Donor	Qty	Pack	Batch	Expiry	Cost Price	Sell Price	Price extension
1		41501	Rilampicin 150mg tab/cap		200	1	DGH98	31/05/2022	2.00	2.00	400.00
2		am500	Amoxicillin 500mg tab		300	1	FGH89	28/02/2026	0.50	0.50	150.00

Subtotal: 550.00

g % tax: 0.00

Total: 550.00

**If there are incorrect item details, you can edit these by double clicking the line and making the necessary changes.**

You cannot edit critical information like the original **Invoice quantity**, but you can change the **Received quantity**. This way, there is always a record of what the Supplier sent you, and what you actually received.

**1. Double click an item to edit it**

**msupply**

File Edit Help

Supplier Invoice

Name: National Medical Warehouse

Confirm date: 00/00/00

Invoice number: 2

Entry date: 01/02/2021

Status: new

Category: None

Donor: [blank]

Comment: Stock transfer (invoice from requisition)

Be aware: modifying this invoice will not change the customer invoice which generated this invoice in the sending store National Medical Warehouse

Other charges

Item(s):

Amount: 0.00

Export batch: 0

Margin: 0.00

Hold

Finalise

**Double click an item to edit it**

L	Location	Item code	Item Name	Donor	Qty	Pack	Batch	Expiry	Cost Price	Sell Price	Price extension
1		41501	Rilampicin 150mg tab/cap		200	1	DGH98	31/05/2022	2.00	2.00	400.00
2		am500	Amoxicillin 500mg tab		300	1	FGH89	28/02/2026	0.50	0.50	150.00

Subtotal: 550.00

g % tax: 0.00

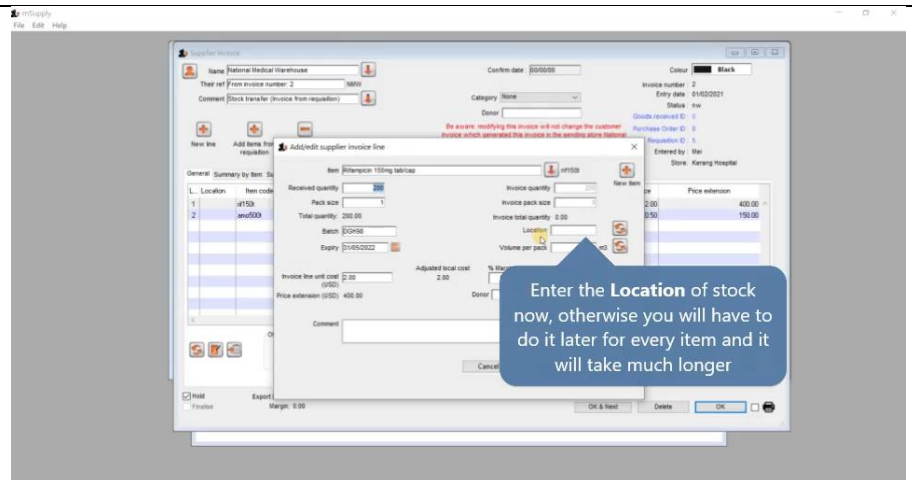
Total: 550.00

OK & Next

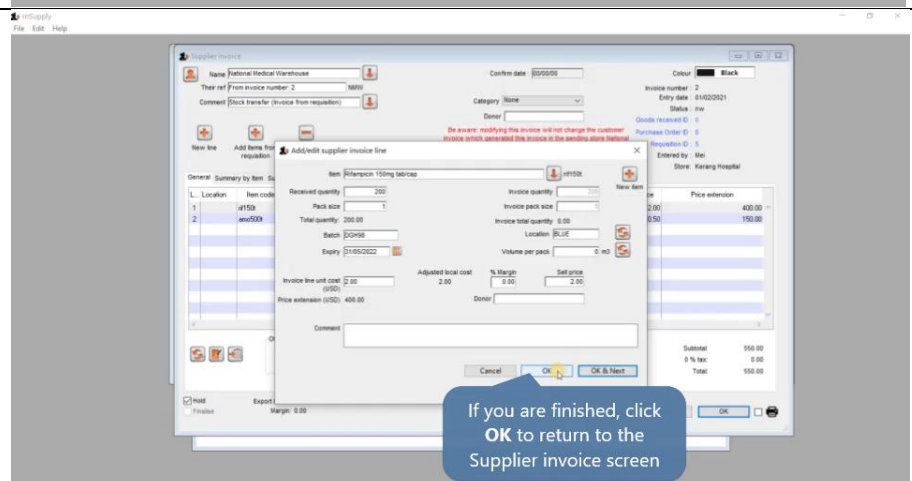
Delete

OK

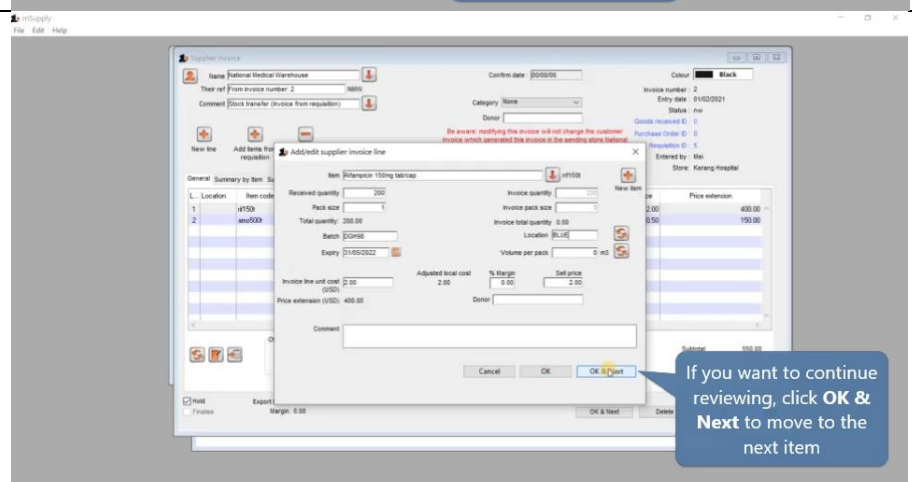
2. Enter the **Location** of stock now, otherwise you will have to do it later for every item and it will take much longer



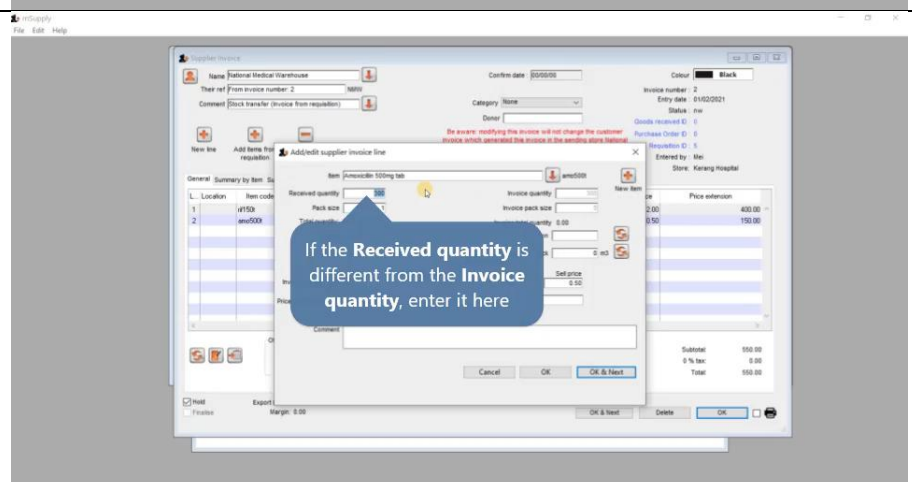
3. If you are finished, click **OK** to return to the Supplier invoice screen



4. If you want to continue reviewing, click **OK & Next** to move to the next item

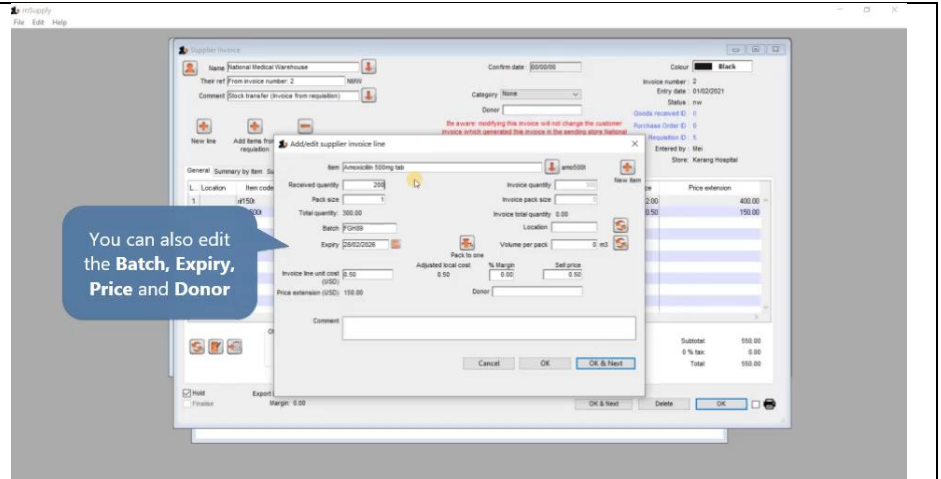


5. If the **Received quantity** is different from the **Invoice quantity**, enter it here

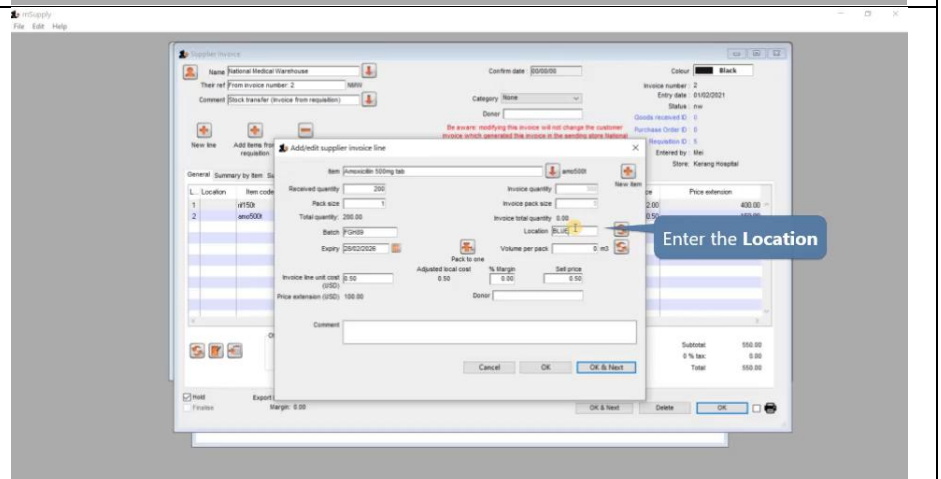




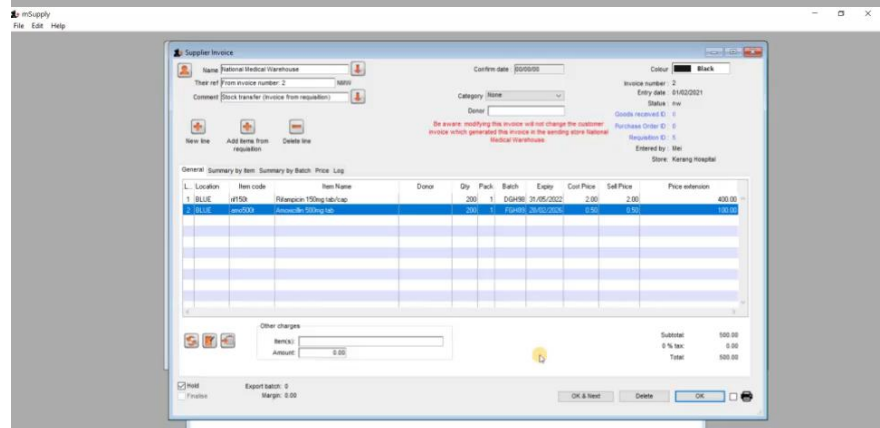
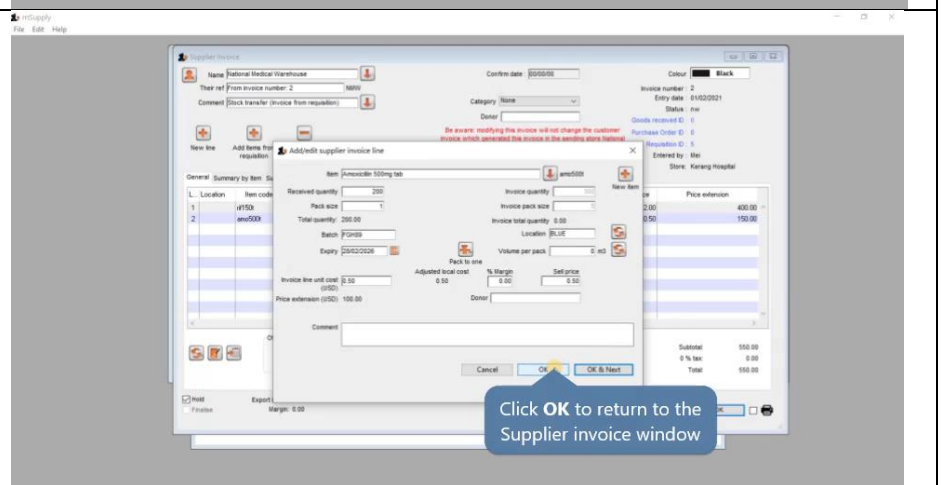
6. You can also edit the **Batch, Expiry, Price and Donor**



7. Enter the **Location**



8. Click **OK** to return to the Supplier invoice window



**Now we will add stock from the Supplier invoice to your inventory**



9. Uncheck the **Hold** box, and check the **Finalise** box.

Supplier Invoice

Name: National Medical Warehouse  
 Their ref: From invoice number: 2  
 Comment: Stock transfer (Invoice from requisition)

Confirm date: 00/00/00  
 Category: None  
 Donor:   
 Colour: Black

Invoice number: 2  
 Entry date: 01/02/2021  
 Status: inv  
 Goods received ID: 0  
 Purchase Order ID: 0  
 Requisition ID: 5  
 Entered by: Mei  
 Store: Karang Hospital

Be aware: modifying this invoice will not change the customer invoice which generated this invoice in the sending store National Medical Warehouse.

L	Location	Item code	Item Name	Donor	Qty	Pack	Batch	Expiry	Cost Price	Sell Price	Price extension
1	BLUE	41150	Ritampicin 150mg tab/cap		200	1	DGH36	31/05/2022	2.00	2.00	400.00
2	BLUE	am500K	Amoxicillin 500mg tab		200	1	FGH89	26/02/2026	0.50	0.50	100.00

Other charges:  
 Items:   
 Amount: 0.00

Subtotal: 500.00  
 0 % tax: 0.00  
 Total: 500.00

Export batch: 0  
 Margin: 0.00

Hold ☐ Finalise ☒

OK & Next Delete OK

10. Click **OK**

If you want to print the invoice, check the **Print** box before clicking **OK**

Supplier Invoice

Name: National Medical Warehouse  
 Their ref: From invoice number: 2  
 Comment: Stock transfer (Invoice from requisition)

Confirm date: 00/00/00  
 Category: None  
 Donor:   
 Colour: Black

Invoice number: 2  
 Entry date: 01/02/2021  
 Status: inv  
 Goods received ID: 0  
 Purchase Order ID: 0  
 Requisition ID: 5  
 Entered by: Mei  
 Store: Karang Hospital

Be aware: modifying this invoice will not change the customer invoice which generated this invoice in the sending store National Medical Warehouse.

L	Location	Item code	Item Name	Donor	Qty	Pack	Batch	Expiry	Cost Price	Sell Price	Price extension
1	BLUE	41150	Ritampicin 150mg tab/cap		200	1	DGH36	31/05/2022	2.00	2.00	400.00
2	BLUE	am500K	Amoxicillin 500mg tab		200	1	FGH89	26/02/2026	0.50	0.50	100.00

Other charges:  
 Items:   
 Amount: 0.00

Subtotal: 500.00  
 0 % tax: 0.00  
 Total: 500.00

Export batch: 0  
 Margin: 0.00

Hold ☐ Finalise ☒

OK & Next Delete **OK** Print

11. Click **Confirm** to enter the items into stock

Confirm...

Confirm invoice and enter into stock now?

Confirm Later

**New stock has now been added to your inventory!**

You can review Supplier invoices at any time by clicking the **Supplier invoices list** button

Remember that a transaction with a status of **fn** is Finalised and can no longer be edited.

Transactions list

Types	Name	Type	St	Entered	Confirmed	Innum	Total	Their ref	Pickslip pri...	Comment	Expor...
Customer invoices	National Medical Warehouse	si	fn	11/02/2...	11/02/2...	5	0				0
Supplier invoices	Coastal Private Pharmacy	si	fn	10/02/2...	10/02/2...	4	0				0

Find Sum Order by Export to Excel Finalise Duplicate Cancel Filters Customise Modify Export to MYOB

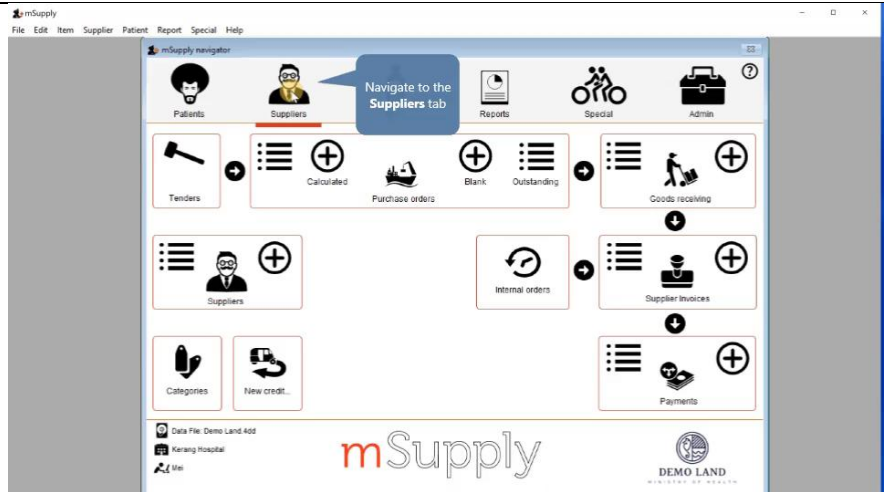
Find... By date By status My transactions My custom filters

1/2/13

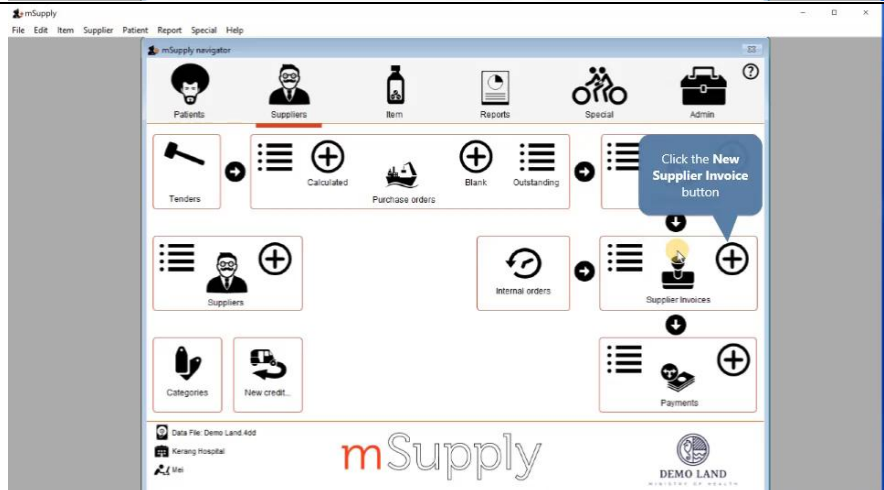
**If you receive stock from any entity that doesn't use mSupply, you will have to create a Supplier invoice manually, which means entering each individual item and its details like batch, expiry and price.**

Remember every time stock enters or leaves your facility, you must enter it in mSupply, no matter where it comes from or where it is going.

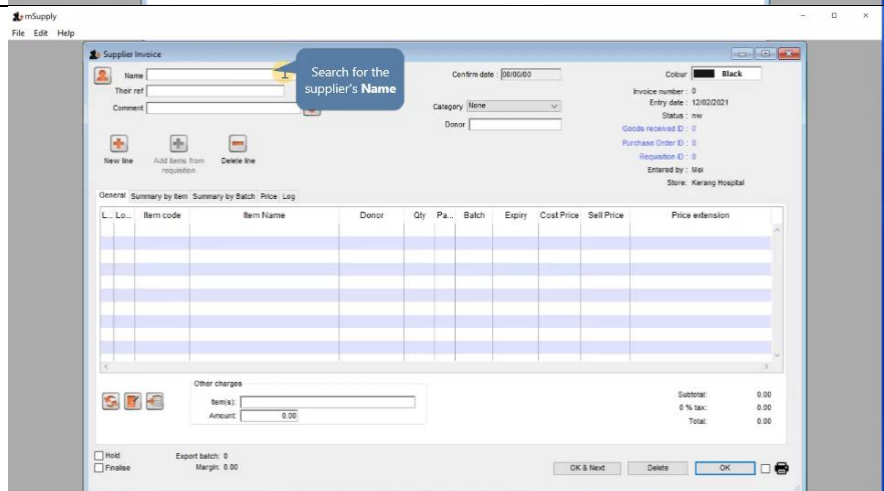
1. Navigate to the **Suppliers** tab



2. Click the **New Supplier Invoice** button



3. Search for the supplier's **Name**



4. Type the first few letters and press **TAB** on your keyboard

- Click the **New line** button to start adding items

6. Search for the **Item** you have received

There are a few ways to do this:

- a)....
- b)....
- c)....

a) Type the Item Code  
then press TAB on  
your keyboard

- The item appears...

The screenshot shows the 'Add/edit supplier invoice line' dialog in the mSupply application. The 'Received quantity' field is highlighted with a blue callout bubble that says 'The item appears'. The dialog includes fields for 'Item' (Amoxicillin 500mg tab), 'Received quantity' (0), 'Pack size' (1), 'Total quantity' (0.00), 'Batch' (000000), 'Expiry' (000000), 'Invoice line unit cost' (0.00), 'Adjusted local cost' (0.00), 'Price extension (USD)' (0.00), 'Invoice quantity' (0), 'Invoice pack size' (1), 'Invoice total quantity' (0.00), 'Location' (None), 'Volume per pack' (0.00), 'Pack to one' (checked), '% Margin' (0.00), 'Sell price' (0.00), and 'Donor'. There are also buttons for 'Cancel', 'OK', and 'OK & Next'.

- Enter the **Received quantity** and **Pack size**

The screenshot shows the 'Add/edit supplier invoice line' dialog in the mSupply application. The 'Received quantity' and 'Pack size' fields are highlighted with a blue callout bubble that says 'Enter the Received quantity and Pack size'. The dialog includes fields for 'Item' (Amoxicillin 500mg tab), 'Received quantity' (0), 'Pack size' (1), 'Total quantity' (0.00), 'Batch' (000000), 'Expiry' (000000), 'Invoice line unit cost' (0.00), 'Adjusted local cost' (0.00), 'Price extension (USD)' (0.00), 'Invoice quantity' (0), 'Invoice pack size' (1), 'Invoice total quantity' (0.00), 'Location' (None), 'Volume per pack' (0.00), 'Pack to one' (checked), '% Margin' (0.00), 'Sell price' (0.00), and 'Donor'. There are also buttons for 'Cancel', 'OK', and 'OK & Next'.

- The **Total quantity** is automatically calculated

The screenshot shows the 'Add/edit supplier invoice line' dialog in the mSupply application. The 'Total quantity' field is highlighted with a blue callout bubble that says 'The Total quantity is automatically calculated'. The dialog includes fields for 'Item' (Amoxicillin 500mg tab), 'Received quantity' (1000), 'Pack size' (1), 'Total quantity' (1,000.00), 'Batch' (000000), 'Expiry' (000000), 'Invoice line unit cost' (0.00), 'Adjusted local cost' (0.00), 'Price extension (USD)' (0.00), 'Invoice quantity' (1000), 'Invoice pack size' (1), 'Invoice total quantity' (1,000.00), 'Location' (None), 'Volume per pack' (0.00), 'Pack to one' (checked), '% Margin' (0.00), 'Sell price' (0.00), and 'Donor'. There are also buttons for 'Cancel', 'OK', and 'OK & Next'.

- Enter the **Batch** and **Expiry**

The screenshot shows the 'Add/edit supplier invoice line' dialog in the mSupply application. The 'Batch' and 'Expiry' fields are highlighted with a blue callout bubble that says 'Enter the Batch and Expiry'. The dialog includes fields for 'Item' (Amoxicillin 500mg tab), 'Received quantity' (1000), 'Pack size' (1), 'Total quantity' (1,000.00), 'Batch' (07E478), 'Expiry' (000000), 'Invoice line unit cost' (0.00), 'Adjusted local cost' (0.00), 'Price extension (USD)' (0.00), 'Invoice quantity' (1000), 'Invoice pack size' (1), 'Invoice total quantity' (1,000.00), 'Location' (None), 'Volume per pack' (0.00), 'Pack to one' (checked), '% Margin' (0.00), 'Sell price' (0.00), and 'Donor'. There are also buttons for 'Cancel', 'OK', and 'OK & Next'.





- Click **OK & Next** to keep adding items to the invoice

- Add the next item...

- b) Type the first few letters and press TAB

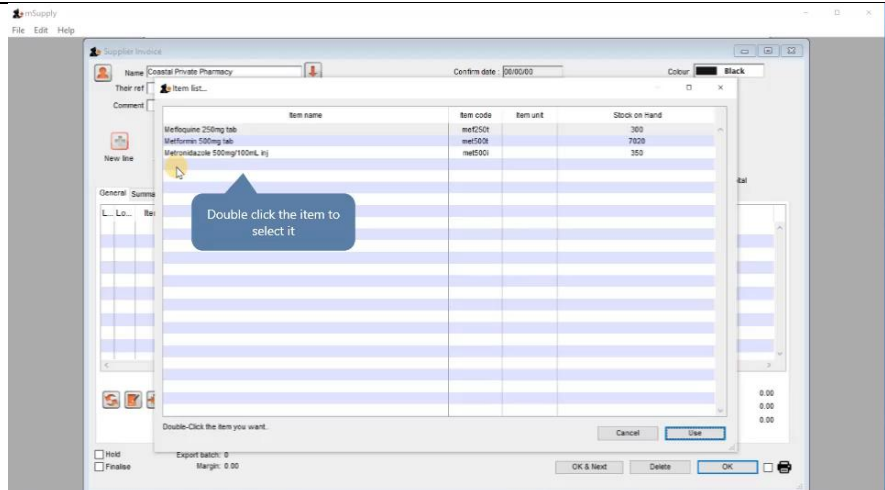
#### 2 possible scenarios:

- If multiple items match your search
- If only 1 item match your search

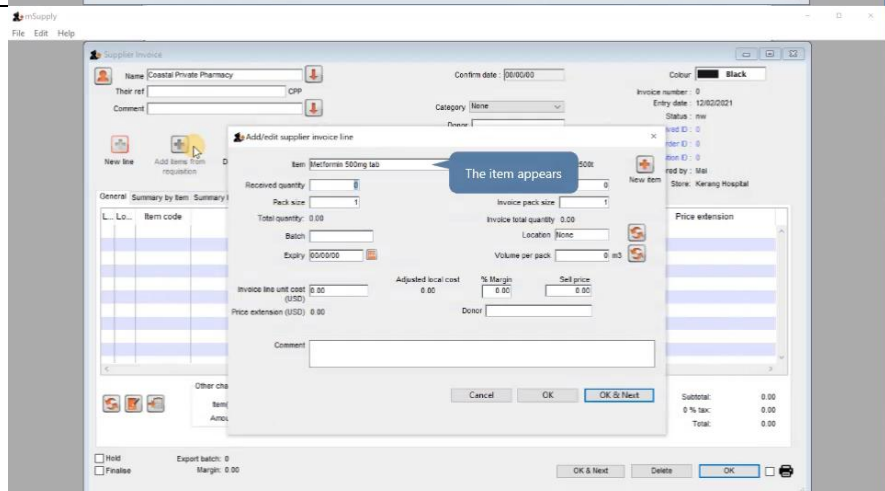
- If multiple items match your search, you will need to select from the list

Item name	Item code	Item unit	Stock on hand
Metformin 500mg tab	me500	360	
Metformin 500mg tab	me500	7320	
Metformin 500mg tab	me500	350	

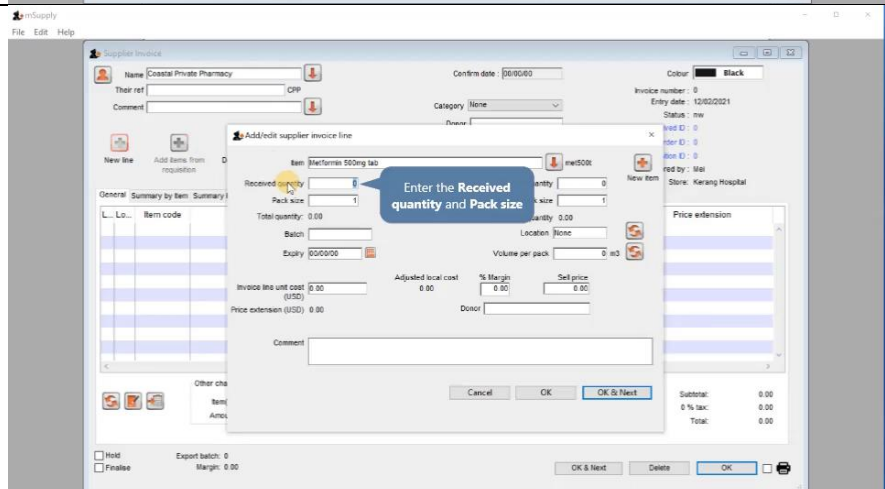
- Double click the item to select it



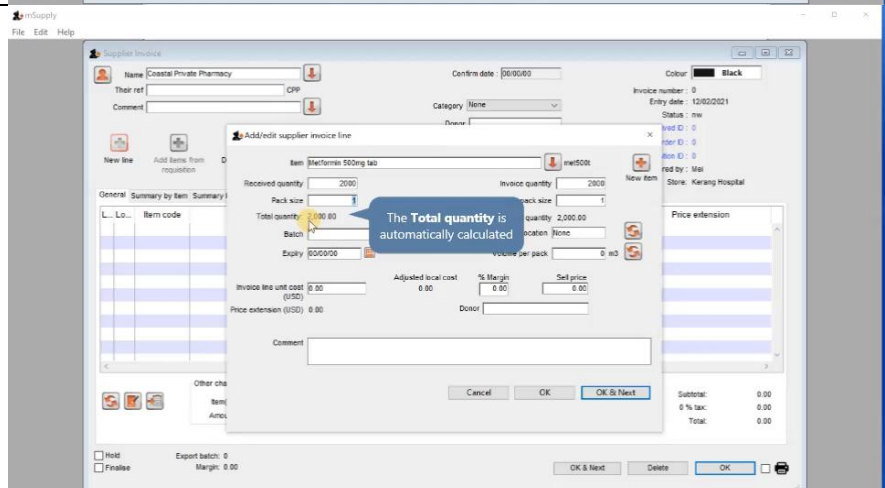
- The item appears...



- Enter the **Received quantity** and **Pack size**



- The **Total quantity** is automatically calculated



- Enter the **Batch** and **Expiry**

- Enter the cost of 1 pack; pay attention to the **Pack size** above

- Enter the **Sell price**, or enter a **% Margin** for mSupply to calculate for you



- Enter the **Location** where you will store the item

Supplier Invoice

Name: Coastal Private Pharmacy

Confirm date: 06/06/20

Invoice number: 0

Entry date: 12/02/2021

Status: new

Inv D: 0

Order D: 0

Inv D: 0

Order D: 0

Store: Kerang Hospital

Colour: Black

Category: None

Phone:

Item: Metformin 500mg tab

Received quantity: 2000

Invoice quantity: 2000

Pack size: 1

Invoice pack size: 1

Total quantity: 2,000.00

Invoice total quantity: 2,000.00

Batch: NYS5890

Location:

Expiry: 31/07/2020

Volume per pack: 0.00

Invoice line unit cost: 0.80

Adjusted local cost: 0.80

% Margin: 0.00

Sell price: 0.80

Price extension (USD): 1,600.00

Doctor:

Comment:

Cancel OK OK & Next

Subtotal: 0.00

0 % tax: 0.00

Total: 0.00

Hold Finalise Export batch: 0 Margin: 0.00

- If you don't enter the full **Location code**, you will need to select it from the list

Supplier Invoice

Name: Coastal Private Pharmacy

Confirm date: 06/06/20

Invoice number: 0

Entry date: 12/02/2021

Status: new

Inv D: 0

Order D: 0

Inv D: 0

Order D: 0

Store: Kerang Hospital

Colour: Black

Category: None

Phone:

Item: Metformin 500mg tab

Received quantity: 2000

Invoice quantity: 2000

Pack size: 1

Invoice pack size: 1

Total quantity: 2,000.00

Invoice total quantity: 2,000.00

Batch: NYS5890

Location: BLUE

Expiry: 31/07/2020

Volume per pack: 0.00

Invoice line unit cost: 0.80

Adjusted local cost: 0.80

% Margin: 0.00

Sell price: 0.80

Price extension (USD): 1,600.00

Doctor:

Comment:

Cancel OK OK & Next

Subtotal: 0.00

0 % tax: 0.00

Total: 0.00

Hold Finalise Export batch: 0 Margin: 0.00

Locations

Search location: BLUE

Code Description Location type Vol used Vol Avail

BLUE Blue Sheep 0 0

1/5 Item Name: Metformin 500mg tab

Restricted to: No Restriction

Cancel OK

- Click **OK & Next** to keep adding items to the invoice

Supplier Invoice

Name: Coastal Private Pharmacy

Confirm date: 06/06/20

Invoice number: 0

Entry date: 12/02/2021

Status: new

Inv D: 0

Order D: 0

Inv D: 0

Order D: 0

Store: Kerang Hospital

Colour: Black

Category: None

Phone:

Item: Metformin 500mg tab

Received quantity: 2000

Invoice quantity: 2000

Pack size: 1

Invoice pack size: 1

Total quantity: 2,000.00

Invoice total quantity: 2,000.00

Batch: NYS5890

Location: BLUE

Expiry: 31/07/2020

Volume per pack: 0.00

Invoice line unit cost: 0.80

Adjusted local cost: 0.80

% Margin: 0.00

Sell price: 0.80

Price extension (USD): 1,600.00

Doctor:

Comment:

Cancel OK OK & Next

Subtotal: 0.00

0 % tax: 0.00

Total: 0.00

Hold Finalise Export batch: 0 Margin: 0.00

- Add the next item...

Supplier Invoice

Name: Coastal Private Pharmacy

Confirm date: 06/06/20

Invoice number: 0

Entry date: 12/02/2021

Status: new

Inv D: 0

Order D: 0

Inv D: 0

Order D: 0

Store: Kerang Hospital

Colour: Black

Category: None

Phone:

Item:

Received quantity: 0

Invoice quantity: 0

Pack size: 1

Invoice pack size: 0

Total quantity: 0.00

Invoice total quantity: 0.00

Batch:

Location:

Expiry: 00/00/00

Volume per pack: 0.00

Invoice line unit cost: 0.00

Adjusted local cost: 0.00

% Margin: 0.00

Sell price: 0.00

Price extension (USD): 0.00

Doctor:

Comment:

Cancel OK OK & Next

Subtotal: 0.00

0 % tax: 0.00

Total: 0.00

Hold Finalise Export batch: 0 Margin: 0.00

- If you type the first few letters and press **TAB**, and only 1 item matches your search..

- Enter the **Invoice unit line cost** and the **Sell price**

- Enter the **Location** where you will store this item

- Click **OK & Next** to keep adding to the invoice

- c) The final way to add an item is to type @ and press TAB

The final way to add an item is to type @ and press TAB

- A list of all **Items** and current **Stock on Hand** is shown

A list of all Items and current Stock on Hand is shown

Item name	Item code	Item unit	Stock on Hand
Amoxicillin 500mg tab	amc500t	2608	
Ceftriaxone 250mg inj	cef250i	97430	
Chloroquine phosphate 100mg (base) tab	chl100t	150000	
Chloroquine phosphate 50mg/5mL syrup	chl50s	743	
Condoms, male	condm	39600	
Diclofenac 50mg tab	dcl50t	1898	
Ertapenem 5mg tab	ert5t	5449	
Gauche 50m x 50m	gauch5	49188	
Ibuprofen 200mg tab	ibu200t	3865	
Isometaxol 500mg tab	iso500t	3608	
Ivermectin 3mg tablets	ive3t	336	
Mefenquine 250mg tab	mef250t	390	
Mefenquine 500mg tab	mef500t	7820	
Mefenquine 500mg/150mL inj	mef500i	350	
Nifedipine 10mg tablets	nif10t	967300	
Paracetamol 500mg tab	par500t	5916600	
Permethrin 5% cream	perm5cr	35100	
Primaquine diphosphate 7.5mg tab	prt7t	30500	
Rifampicin 150mg + isoniazid 150mg tab	rif15t	22290	
Rifampicin 150mg + isoniazid 75mg tab	rif75t	0	
Rifampicin 150mg tab/cap	rif150t	0	

- Double click an item to select it

Double click an item to select it

- Enter all details of the received item

Enter all details of the received item

**Tip**  
You can use the **TAB** key to move to the next field

Supplier Invoice

Name: Coastal Private Pharmacy

Confirm date: 06/06/2021

Invoice number: 0

Entry date: 12/02/2021

Status: new

Yard ID: 0

User ID: 0

Red by: Mei

Store: Kerang Hospital

Colour: Black

Item: Bupropfen 200mg tab

Received quantity: 1000

Invoice quantity: 1000

Pack size: 1

Invoice pack size: 1

Total quantity: 1,000.00

Invoice total quantity: 1,000.00

Batch: AL278

Location: None

Expiry: 03/09/20

Volume per pack: 0 no

Invoice line unit cost: 0.00

Adjusted local cost: 0.00

% Margin: 0.00

Sell price: 0.00

Price extension (USD): 0.00

Donor:

Comment:

Cancel OK OK & Next

Subtotal: 0.00

0 % tax: 0.00

Total: 0.00

Hold Finalise Export batch: 0 Margin: 0.00

Supplier Invoice

Name: Coastal Private Pharmacy

Confirm date: 06/06/2021

Invoice number: 0

Entry date: 12/02/2021

Status: new

Yard ID: 0

User ID: 0

Red by: Mei

Store: Kerang Hospital

Colour: Black

Item: Bupropfen 200mg tab

Received quantity: 1000

Invoice quantity: 1000

Pack size: 1

Invoice pack size: 1

Total quantity: 1,000.00

Invoice total quantity: 1,000.00

Batch: AL278

Location: None

Expiry: 03/09/20

Volume per pack: 0 no

Invoice line unit cost: 0.00

Adjusted local cost: 0.00

% Margin: 0.00

Sell price: 0.00

Price extension (USD): 0.00

Donor:

Comment:

Cancel OK OK & Next

Subtotal: 0.00

0 % tax: 0.00

Total: 0.00

Hold Finalise Export batch: 0 Margin: 0.00

Supplier Invoice

Name: Coastal Private Pharmacy

Confirm date: 06/06/2021

Invoice number: 0

Entry date: 12/02/2021

Status: new

Yard ID: 0

User ID: 0

Red by: Mei

Store: Kerang Hospital

Colour: Black

Item: Bupropfen 200mg tab

Received quantity: 1000

Invoice quantity: 1000

Pack size: 1

Invoice pack size: 1

Total quantity: 1,000.00

Invoice total quantity: 1,000.00

Batch: AL278

Location: None

Expiry: 03/09/20

Volume per pack: 0 no

Invoice line unit cost: 0.10

Adjusted local cost: 0.10

% Margin: 0.00

Sell price: 0.10

Price extension (USD): 100.00

Donor:

Comment:

Cancel OK OK & Next

Subtotal: 0.00

0 % tax: 0.00

Total: 0.00

Hold Finalise Export batch: 0 Margin: 0.00

Click **OK** to return to the Supplier invoice

Supplier Invoice

Name: Coastal Private Pharmacy

Confirm date: 06/06/2021

Invoice number: 0

Entry date: 12/02/2021

Status: new

Yard ID: 0

User ID: 0

Red by: Mei

Store: Kerang Hospital

Colour: Black

Item: Bupropfen 200mg tab

Received quantity: 1000

Invoice quantity: 1000

Pack size: 1

Invoice pack size: 1

Total quantity: 1,000.00

Invoice total quantity: 1,000.00

Batch: AL278

Location: BLUE

Expiry: 03/09/20

Volume per pack: 0 no

Invoice line unit cost: 0.10

Adjusted local cost: 0.10

% Margin: 0.00

Sell price: 0.10

Price extension (USD): 100.00

Donor:

Comment:

Cancel OK OK & Next

Subtotal: 0.00

0 % tax: 0.00

Total: 0.00

Hold Finalise Export batch: 0 Margin: 0.00

Now, all the items you added are on the Supplier invoice!

mSupply  
File Edit Help

Supplier Invoice

Name: Coastal Private Pharmacy  
Ther ref:   
Comment:   
Confirm date: 06/06/20  
Category: None  
Donor:   
Colour: Black  
Invoice number: 6  
Entry date: 12/02/2021  
Status: new  
Goods received ID: 0  
Purchase Order ID: 0  
Requestion ID: 0  
Entered by: Mei  
Store: Kerang Hospital

New line Add items from requisition Delete line

General Summary by Item Summary by Batch Price Log

Line	Local	Item code	Item Name	Donor	Qty	Pack	Batch	Expiry	Cost Price	Sell Price	Price extension
1	BLUE	amo500t	Amoxicillin 500mg tab		1000	1	GTE478	31/08/20	0.40	0.40	400.00
2	BLUE	met500t	Metformin 500mg tab		2000	1	WBS890	31/07/20	0.80	0.80	1,600.00
3	BLUE	ena5t	Enalapril 5mg tab		4000	1	QLK342	31/01/20	0.20	0.20	800.00
4	BLUE	ibu200t	Ibuprofen 200mg tab		1000	1	ALD788	30/04/20	0.10	0.10	100.00

Other charges  
Items:   
Amount: 0.00

Subtotal: 2,900.00  
0 % tax: 0.00  
Total: 2,900.00

Hold Finalize Export batch: 0 Margin: 0.00 OK & Next Delete OK

All the items you added are on the Supplier invoice

The **Total** invoice cost is shown

mSupply  
File Edit Help

Supplier Invoice

Name: Coastal Private Pharmacy  
Ther ref:   
Comment:   
Confirm date: 06/06/20  
Category: None  
Donor:   
Colour: Black  
Invoice number: 6  
Entry date: 12/02/2021  
Status: new  
Goods received ID: 0  
Purchase Order ID: 0  
Requestion ID: 0  
Entered by: Mei  
Store: Kerang Hospital

New line Add items from requisition Delete line

General Summary by Item Summary by Batch Price Log

Line	Local	Item code	Item Name	Donor	Qty	Pack	Batch	Expiry	Cost Price	Sell Price	Price extension
1	BLUE	amo500t	Amoxicillin 500mg tab		1000	1	GTE478	31/08/20	0.40	0.40	400.00
2	BLUE	met500t	Metformin 500mg tab		2000	1	WBS890	31/07/20	0.80	0.80	1,600.00
3	BLUE	ena5t	Enalapril 5mg tab		4000	1	QLK342	31/01/20	0.20	0.20	800.00
4	BLUE	ibu200t	Ibuprofen 200mg tab		1000	1	ALD788	30/04/20	0.10	0.10	100.00

Other charges  
Items:   
Amount: 0.00

Subtotal: 2,900.00  
0 % tax: 0.00  
Total: 2,900.00

Hold Finalize Export batch: 0 Margin: 0.00 OK & Next Delete OK

The **Total** invoice cost is shown here

You can organize the items in alphabetical order by clicking the column heading

mSupply  
File Edit Help

Supplier Invoice

Name: Coastal Private Pharmacy  
Ther ref:   
Comment:   
Confirm date: 06/06/20  
Category: None  
Donor:   
Colour: Black  
Invoice number: 6  
Entry date: 12/02/2021  
Status: new  
Goods received ID: 0  
Purchase Order ID: 0  
Requestion ID: 0  
Entered by: Mei  
Store: Kerang Hospital

New line Add items from requisition Delete line

General Summary by Item Summary by Batch Price Log

Line	Local	Item code	Item Name	Donor	Qty	Pack	Batch	Expiry	Cost Price	Sell Price	Price extension
1	BLUE	amo500t	Amoxicillin 500mg tab		1000	1	GTE478	31/08/20	0.40	0.40	400.00
2	BLUE	met500t	Metformin 500mg tab		2000	1	WBS890	31/07/20	0.80	0.80	1,600.00
3	BLUE	ena5t	Enalapril 5mg tab		4000	1	QLK342	31/01/20	0.20	0.20	800.00
4	BLUE	ibu200t	Ibuprofen 200mg tab		1000	1	ALD788	30/04/20	0.10	0.10	100.00

Other charges  
Items:   
Amount: 0.00

Subtotal: 2,900.00  
0 % tax: 0.00  
Total: 2,900.00

Hold Finalize Export batch: 0 Margin: 0.00 OK & Next Delete OK

You can organise the items in alphabetical order by clicking the column heading

You can record **Other** charges

mSupply  
File Edit Help

Supplier Invoice

Name: Coastal Private Pharmacy  
Ther ref:   
Comment:   
Confirm date: 06/06/20  
Category: None  
Donor:   
Colour: Black  
Invoice number: 6  
Entry date: 12/02/2021  
Status: new  
Goods received ID: 0  
Purchase Order ID: 0  
Requestion ID: 0  
Entered by: Mei  
Store: Kerang Hospital

New line Add items from requisition Delete line

General Summary by Item Summary by Batch Price Log

Line	Local	Item code	Item Name	Donor	Qty	Pack	Batch	Expiry	Cost Price	Sell Price	Price extension
1	BLUE	amo500t	Amoxicillin 500mg tab		1000	1	GTE478	31/08/20	0.40	0.40	400.00
3	BLUE	ena5t	Enalapril 5mg tab		4000	1	QLK342	31/01/20	0.20	0.20	800.00
4	BLUE	ibu200t	Ibuprofen 200mg tab		1000	1	ALD788	30/04/20	0.10	0.10	100.00
2	BLUE	met500t	Metformin 500mg tab		2000	1	WBS890	31/07/20	0.80	0.80	1,600.00

Other charges  
Items:   
Amount: 0.00

Subtotal: 2,900.00  
0 % tax: 0.00  
Total: 2,900.00

Hold Finalize Export batch: 0 Margin: 0.00 OK & Next Delete OK

You can record **Other** charges here



7. Enter the **Amount** and press **TAB**

The **Total** invoice price is updated

Supplier Invoice

Name: Coastal Private Pharmacy  
 Ther ref: CPP  
 Comment:   
 Confirm date: 06/06/20  
 Category: None  
 Donor:   
 Invoice number: 6  
 Entry date: 12/02/2021  
 Status: new  
 Goods received ID: 0  
 Purchase Order ID: 0  
 Requisition ID: 0  
 Entered by: Mai  
 Store: Kerang Hospital

General Summary by Item Summary by Batch Price Log

Line	Locall	Item code	Item Name	Donor	Qty	Pack	Batch	Expiry	Cost Price	Sell Price	Price extension
1	BLUE	amo500t	Amoxicillin 500mg tab		1000	1	GTE478	31/08/20	0.40	0.40	400.00
3	BLUE	enu50t	Enalapril 5mg tab		4000	1	QLK342	31/01/20	0.20	0.20	800.00
4	BLUE	ibu200t	Ibuprofen 200mg tab		1000	1	ALD788	30/04/20	0.10	0.10	100.00
2	BLUE	me500t	Metformin 500mg tab		2000	1	WBS390	31/07/20	0.80	0.80	1,600.00

Other charges

Item(s): Processing fee  
 Amount: 10

Subtotal: 2,900.00  
 0 % tax: 0.00  
 Total: 2,900.00

Hold ☐ Finalise ☐ Export batch: 0 Margin: 0.00

OK & Next Delete OK

Supplier Invoice

Name: Coastal Private Pharmacy  
 Ther ref: CPP  
 Comment:   
 Confirm date: 06/06/20  
 Category: None  
 Donor:   
 Invoice number: 6  
 Entry date: 12/02/2021  
 Status: new  
 Goods received ID: 0  
 Purchase Order ID: 0  
 Requisition ID: 0  
 Entered by: Mai  
 Store: Kerang Hospital

General Summary by Item Summary by Batch Price Log

Line	Locall	Item code	Item Name	Donor	Qty	Pack	Batch	Expiry	Cost Price	Sell Price	Price extension
1	BLUE	amo500t	Amoxicillin 500mg tab		1000	1	GTE478	31/08/20	0.40	0.40	400.00
3	BLUE	enu50t	Enalapril 5mg tab		4000	1	QLK342	31/01/20	0.20	0.20	800.00
4	BLUE	ibu200t	Ibuprofen 200mg tab		1000	1	ALD788	30/04/20	0.10	0.10	100.00
2	BLUE	me500t	Metformin 500mg tab		2000	1	WBS390	31/07/20	0.80	0.80	1,600.00

Other charges

Item(s): Processing fee  
 Amount: 10.00

Subtotal: 2,910.00  
 0 % tax: 0.00  
 Total: 2,910.00

Hold ☐ Finalise ☐ Export batch: 0 Margin: 0.00

OK & Next Delete OK

8. When you are sure that everything is correct, click the **Finalise** box

Supplier Invoice

Name: Coastal Private Pharmacy  
 Ther ref: CPP  
 Comment:   
 Confirm date: 06/06/20  
 Category: None  
 Donor:   
 Invoice number: 6  
 Entry date: 12/02/2021  
 Status: new  
 Goods received ID: 0  
 Purchase Order ID: 0  
 Requisition ID: 0  
 Entered by: Mai  
 Store: Kerang Hospital

General Summary by Item Summary by Batch Price Log

Line	Locall	Item code	Item Name	Donor	Qty	Pack	Batch	Expiry	Cost Price	Sell Price	Price extension
1	BLUE	amo500t	Amoxicillin 500mg tab		1000	1	GTE478	31/08/20	0.40	0.40	400.00
3	BLUE	enu50t	Enalapril 5mg tab		4000	1	QLK342	31/01/20	0.20	0.20	800.00
4	BLUE	ibu200t	Ibuprofen 200mg tab		1000	1	ALD788	30/04/20	0.10	0.10	100.00
2	BLUE	me500t	Metformin 500mg tab		2000	1	WBS390	31/07/20	0.80	0.80	1,600.00

Other charges

Item(s): Processing fee  
 Amount: 10.00

Subtotal: 2,910.00  
 0 % tax: 0.00  
 Total: 2,910.00

Hold ☐ Finalise ☐ Export batch: 0 Margin: 0.00

OK & Next Delete OK

9. Click **OK**

Supplier Invoice

Name: Coastal Private Pharmacy  
 Ther ref: CPP  
 Comment:   
 Confirm date: 06/06/20  
 Category: None  
 Donor:   
 Invoice number: 6  
 Entry date: 12/02/2021  
 Status: new  
 Goods received ID: 0  
 Purchase Order ID: 0  
 Requisition ID: 0  
 Entered by: Mai  
 Store: Kerang Hospital

General Summary by Item Summary by Batch Price Log

Line	Locall	Item code	Item Name	Donor	Qty	Pack	Batch	Expiry	Cost Price	Sell Price	Price extension
1	BLUE	amo500t	Amoxicillin 500mg tab		1000	1	GTE478	31/08/20	0.40	0.40	400.00
3	BLUE	enu50t	Enalapril 5mg tab		4000	1	QLK342	31/01/20	0.20	0.20	800.00
4	BLUE	ibu200t	Ibuprofen 200mg tab		1000	1	ALD788	30/04/20	0.10	0.10	100.00
2	BLUE	me500t	Metformin 500mg tab		2000	1	WBS390	31/07/20	0.80	0.80	1,600.00

Other charges

Item(s): Processing fee  
 Amount: 10.00

Subtotal: 2,910.00  
 0 % tax: 0.00  
 Total: 2,910.00

Hold ☐ Finalise ☐ Export batch: 0 Margin: 0.00

OK & Next Delete OK

## 10. Click **Confirm**

Supplier Invoice

Name: Coastal Private Pharmacy  
 Their ref:   
 Comment:   
 Confirm date: 08/06/20  
 Category: None  
 Donor:   
 Invoice number: 8  
 Entry date: 12/02/2021  
 Status: new  
 Goods received: 0  
 Purchase Order: 0  
 Requisition: 0  
 Entered by: Mei  
 Store: Kerang Hospital

General Summary by Item Summary by Batch Price Log

Line	Local	Item code	Item Name	Price	Sell Price	Price extension
1	BLUE	amo500t	Amoxicillin 500mg tab	0.40	0.40	400.00
3	BLUE	emo500t	Etiopirif 50mg tab	0.20	0.20	800.00
4	BLUE	ibu200t	Ibuprofen 200mg tab	0.10	0.10	100.00
2	BLUE	met500t	Metformin 500mg tab	0.80	0.80	1,600.00

Other charges  
 Item(s): Processing fee  
 Amount: 10.00

Subtotal: 2,910.00  
 6 % tax: 0.00  
 Total: 2,910.00

Export batch: 0  
 Margin: 0.00

OK & Next Delete OK

The delivery has been received and stock levels have been updated!

mSupply Navigator

Patients Suppliers Item Reports Special Admin

Tenders Calculated Purchase orders Blank Outstanding Goods receiving Internal orders Supplier invoices Payments Categories New credit

The delivery has been received and stock levels have been updated

mSupply

DEMO LAND

Which Supplier invoice button should you use when receiving stock?

Well, it depends on where your delivery has come from...

➤ **For Internal supplier**  
 i.e where your supplier uses mSupply, a Supplier invoice will be waiting for you to receive in the **Supplier invoices list**.

mSupply Navigator

Patients Suppliers Item Reports Special Admin

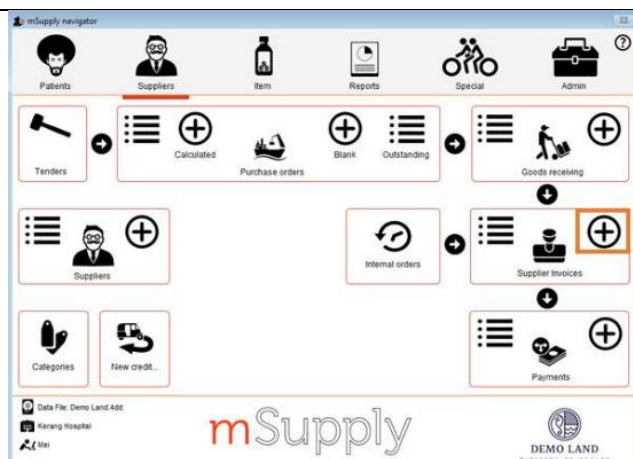
Tenders Calculated Purchase orders Blank Outstanding Goods receiving Internal orders Supplier invoices Payments Categories New credit

The delivery has been received and stock levels have been updated

mSupply

DEMO LAND

➤ **For External supplier**  
i.e. where your supplier  
doesn't use mSupply, you  
have to enter a **New  
supplier invoice** manually.





## **Session 1.10 Internet Connectivity**

mSupply stores communicate with each other through the internet. Data from your facility's computer is sent to a server which is usually located at a central IT headquarters or in the cloud.

**A server** is a powerful computer designed to process incoming data and deliver data to other computers over the internet. You can think of the mSupply server as the hub of your country's supply chain. It receives information from every computer around the country and decides what information it needs to send to other facilities.

Your mSupply computer needs the internet to synchronise (sync) with the server. When it syncs your store communicates with other stores. This is how your orders are sent to your suppliers, and how you receive requisitions from your customers.

### **What happens where the internet is unstable?**

When the internet is disconnected, your computer isn't communicating with the server. That means any orders you place won't be received by your supplier, and you won't receive any requisitions placed by your customers. However, when you connect to the internet, data will sync automatically.

***Legacy Level 2***

## Session 2.1 Requisitions

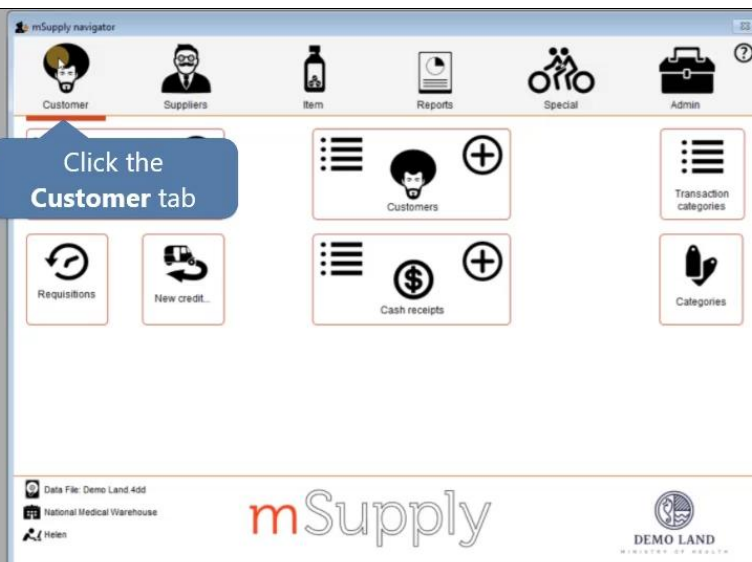
A **Requisition** is a request for stock from a customer.

When a customer places an internal order using mSupply, it will arrive at the supplying store as a Requisition. The supplier reviews the Requisition, then issues a Customer Invoice to issue stock from their store.

Requisitions arrive with some important information about a customer's stock situation, which you can assess before deciding what will actually be issued. A requisition shows you your stock on hand, the customer's stock on hand, average monthly consumption, stock requested, quantity already issued, quantity remaining to supply, quantity to be supplied, Max MOS and Threshold MOS.

Multiple Customer invoices can be created from a single Requisition and this happens if you don't have enough stock to completely fulfil a Requisition when it first arrives. You only finalise a requisition if you have supplied everything from the requisition or if you haven't supplied everything but don't intend to supply any more later. Once finalized, you cannot issue any more Customer invoices from it.

1. Navigate the **Customer** tab

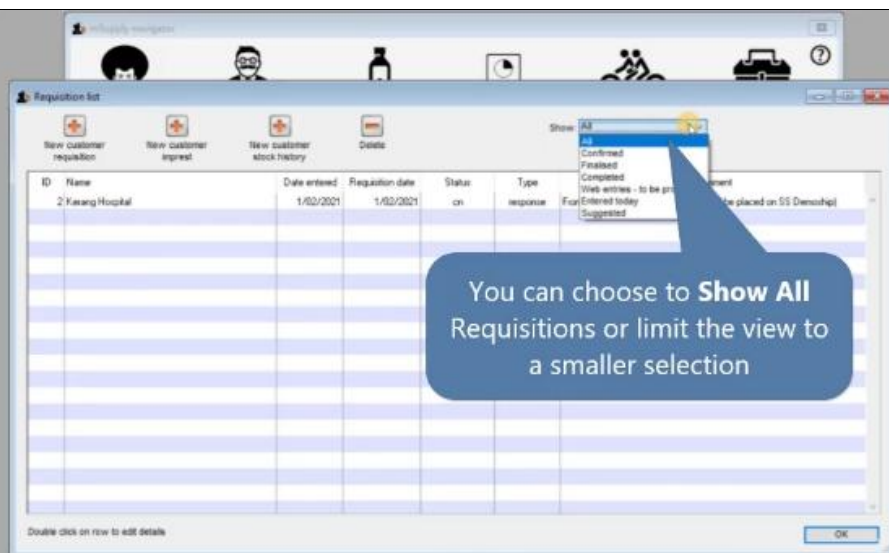


2. Click the **Requisitions** button

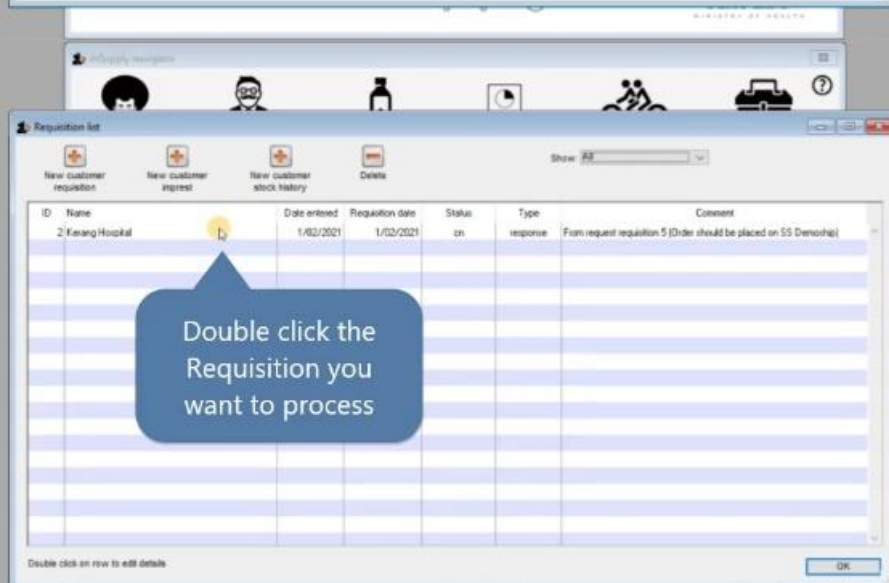


- You can choose to **Show All** Requisitions or limit the view to a smaller selection

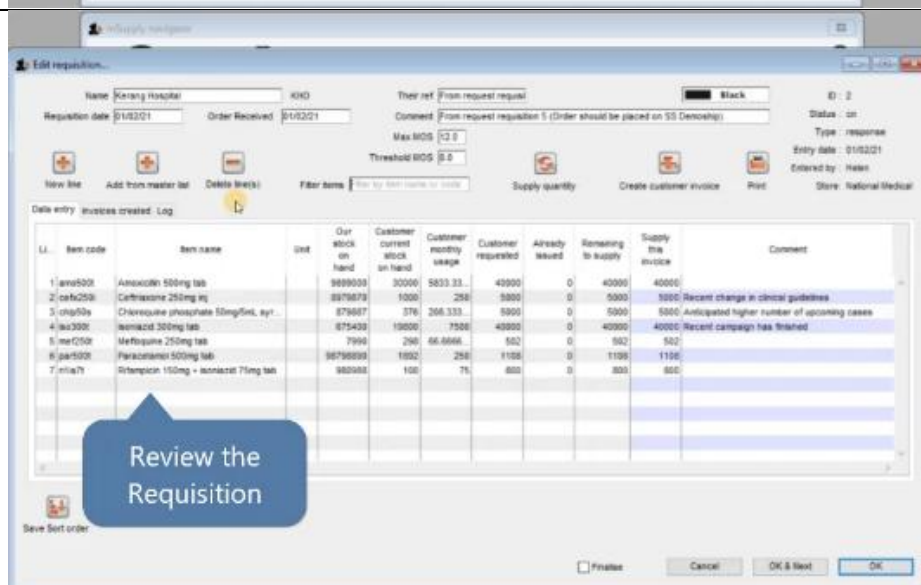
Requisitions with the **sg** status have not been processed.



- Double click the Requisition you want to process



- Review the Requisition



.... Showing the current stock available in **Your** store

The screenshot shows the 'Edit requisition' window for 'Kerang Hospital'. The 'Our stock on hand' column is highlighted, showing values for various items. A blue callout bubble points to the 'Our stock on hand' column with the text: 'The current stock available in YOUR store'.

LI	Item code	Item name	Unit	Our stock on hand	Customer current stock on hand	Customer monthly usage	Customer requested	Already issued	Remaining to supply	Supply this invoice	Comment
1	amc500t	Amoxicillin 500mg tab		900000	30000	5033.33	40000	0	40000	40000	
2	cefz250i	Ceftriaxone 250mg inj		8979879	1000	250	5000	0	5000	5000	Recent change in clinical guidelines
3	chlq50a	Chloroquine phosphate 50mg/5ml, syr...		879687	376	206.333	5000	0	5000	5000	Anticipated higher number of upcoming cases
4	iso300t	Isotrizol 300mg tab		875400	19800	7500	40000	0	40000	40000	Recent campaign has finished
5	meq250t	Mefenquine 250mg tab		7990	296	66.6666	502	0	502	502	
6	par500t	Paracetamol 500mg tab		98798990	1892	250	1108	0	1108	1108	
7	rtia7t	Rifampicin 150mg + isoniazid 75mg tab		980980	100	75	800	0	800	800	

...the customer's current available stock

The screenshot shows the 'Edit requisition' window for 'Kerang Hospital'. The 'Customer current stock on hand' column is highlighted, showing values for various items. A blue callout bubble points to the 'Customer current stock on hand' column with the text: 'The customer's current available stock'.

LI	Item code	Item name	Unit	Our stock on hand	Customer current stock on hand	Customer monthly usage	Customer requested	Already issued	Remaining to supply	Supply this invoice	Comment
1	amc500t	Amoxicillin 500mg tab		900000	30000	5033.33	40000	0	40000	40000	
2	cefz250i	Ceftriaxone 250mg inj		8979879	1000	250	5000	0	5000	5000	Recent change in clinical guidelines
3	chlq50a	Chloroquine phosphate 50mg/5ml, syr...		879687	376	206.333	5000	0	5000	5000	Anticipated higher number of upcoming cases
4	iso300t	Isotrizol 300mg tab		875400	19800	7500	40000	0	40000	40000	Recent campaign has finished
5	meq250t	Mefenquine 250mg tab		7990	296	66.6666	502	0	502	502	
6	par500t	Paracetamol 500mg tab		98798990	1892	250	1108	0	1108	1108	
7	rtia7t	Rifampicin 150mg + isoniazid 75mg tab		980980	100	75	800	0	800	800	

... the customer's average monthly usage

The screenshot shows the 'Edit requisition' window for 'Kerang Hospital'. The 'Customer monthly usage' column is highlighted, showing values for various items. A blue callout bubble points to the 'Customer monthly usage' column with the text: 'The customer's average monthly usage'.

LI	Item code	Item name	Unit	Our stock on hand	Customer current stock on hand	Customer monthly usage	Customer requested	Already issued	Remaining to supply	Supply this invoice	Comment
1	amc500t	Amoxicillin 500mg tab		900000	30000	5033.33	40000	0	40000	40000	
2	cefz250i	Ceftriaxone 250mg inj		8979879	1000	250	5000	0	5000	5000	Recent change in clinical guidelines
3	chlq50a	Chloroquine phosphate 50mg/5ml, syr...		879687	376	206.333	5000	0	5000	5000	Anticipated higher number of upcoming cases
4	iso300t	Isotrizol 300mg tab		875400	19800	7500	40000	0	40000	40000	Recent campaign has finished
5	meq250t	Mefenquine 250mg tab		7990	296	66.6666	502	0	502	502	
6	par500t	Paracetamol 500mg tab		98798990	1892	250	1108	0	1108	1108	
7	rtia7t	Rifampicin 150mg + isoniazid 75mg tab		980980	100	75	800	0	800	800	

...the amount the customer has requested

The screenshot shows the 'Edit requisition' window for 'Kerang Hospital'. The 'Customer requested' column in the table is highlighted with a blue callout bubble that says 'The amount the customer has requested'.

LI	Item code	Item name	Unit	Our stock on hand	Customer current stock on hand	Customer monthly usage	Customer requested	Already issued	Remaining to supply	Supply this invoice	Comment
1	amc500	Amoxicillin 500mg tab		9899000	10000	1833.33	40000	0	40000	40000	
2	cerh250	Ceftriaxone 250mg inj		8979870	1000	250	5000	0	5000	5000	Recent change in clinical guidelines
3	chp500	Chloroquine phosphate 500mg/5mL syr...		879687	376	200.333	5000	0	5000	5000	Anticipated higher number of upcoming cases
4	iso300	Isoniazid 300mg tab		875400	19800	7500	40000	0	40000	40000	Recent campaign has finished
5	me250	Mefloquine 250mg tab		7990	296	66.6666	502	0	502	502	
6	par500	Paracetamol 500mg tab		96798890	1892	250	1108	0	1108	1108	
7	rtia71	Ritampicin 150mg + isoniazid 75mg tab		980980	100	75	800	0	800	800	

.... how much is remaining to supply off this Requisition

The screenshot shows the 'Edit requisition' window for 'Kerang Hospital'. The 'Remaining to supply' column in the table is highlighted with a blue callout bubble that says 'How much is remaining to supply off this Requisition'.

LI	Item code	Item name	Unit	Our stock on hand	Customer current stock on hand	Customer monthly usage	Customer requested	Already issued	Remaining to supply	Supply this invoice	Comment
1	amc500	Amoxicillin 500mg tab		9899000	10000	1833.33	40000	0	40000	40000	
2	cerh250	Ceftriaxone 250mg inj		8979870	1000	250	5000	0	5000	5000	Recent change in clinical guidelines
3	chp500	Chloroquine phosphate 500mg/5mL syr...		879687	376	200.333	5000	0	5000	5000	Anticipated higher number of upcoming cases
4	iso300	Isoniazid 300mg tab		875400	19800	7500	40000	0	40000	40000	Recent campaign has finished
5	me250	Mefloquine 250mg tab		7990	296	66.6666	502	0	502	502	
6	par500	Paracetamol 500mg tab		96798890	1892	250	1108	0	1108	1108	
7	rtia71	Ritampicin 150mg + isoniazid 75mg tab		980980	100	75	800	0	800	800	

...how much you are going to supply now

The screenshot shows the 'Edit requisition' window for 'Kerang Hospital'. The 'Supply this invoice' column in the table is highlighted with a blue callout bubble that says 'How much you are going to supply now'.

LI	Item code	Item name	Unit	Our stock on hand	Customer current stock on hand	Customer monthly usage	Customer requested	Already issued	Remaining to supply	Supply this invoice	Comment
1	amc500	Amoxicillin 500mg tab		9899000	10000	1833.33	40000	0	40000	40000	
2	cerh250	Ceftriaxone 250mg inj		8979870	1000	250	5000	0	5000	5000	Recent change in clinical guidelines
3	chp500	Chloroquine phosphate 500mg/5mL syr...		879687	376	200.333	5000	0	5000	5000	Anticipated higher number of upcoming cases
4	iso300	Isoniazid 300mg tab		875400	19800	7500	40000	0	40000	40000	Recent campaign has finished
5	me250	Mefloquine 250mg tab		7990	296	66.6666	502	0	502	502	
6	par500	Paracetamol 500mg tab		96798890	1892	250	1108	0	1108	1108	
7	rtia71	Ritampicin 150mg + isoniazid 75mg tab		980980	100	75	800	0	800	800	



You can issue the customer with less stock than they requested

**Edit requisition...**

Name: Kerang Hospital KID Their ref: From request requis... Black ID: 2  
 Requisition date: 01/02/21 Order Received: 01/02/21 Comment: From request requisition 5 (Order should be placed on SS Demoshop)  
 Status: on Type: response Entry date: 01/02/21 Entered by: Helen Store: National Medical

Max MOS: 12.0 Threshold MOS: 0.0

Buttons: New line, Add from master list, Delete line(s), Filter items, Supply quantity, Create customer invoice, Print

Data entry Invoices created Log

LI	Item code	Item name	Unit	Our stock on hand	Customer current stock on hand	Customer monthly usage	Customer requested	Already issued	Remaining to supply	Supply this invoice	Comment
1	amc500	Amoxicillin 500mg tab		9000000	30000	5833.33	40000	0	40000	30000	
2	cefz250	Ceftriaxone 250mg inj		8979678	1800	250	5000	0	5000	5000	Recent change in clinical guidelines
3	chp500	Chloroquine phosphate 500mg/5ml, syr...		879607	376	200.333	5000	0	5000	5000	Anticipated higher number of upcoming cases
4	iso300	Isoniazid 300mg tab		875408	18000	7000	40000	0	40000	40000	Recent campaign has finished
5	me250	Mefenquine 250mg tab		7966	290	66.6666	502	0	502	502	
6	par500	Paracetamol 500mg tab		86798996	1892	250	1108	0	1108	1108	
7	rtia7	Rifampicin 150mg + isoniazid 75mg tab		900000	100	75	800	0	800	800	

Buttons: Save Sort order, Finalise

**You can issue the customer with less stock than they requested**

You can also round up or down based on available pack sizes

**Edit requisition...**

Name: Kerang Hospital KID Their ref: From request requis... Black ID: 2  
 Requisition date: 01/02/21 Order Received: 01/02/21 Comment: From request requisition 5 (Order should be placed on SS Demoshop)  
 Status: on Type: response Entry date: 01/02/21 Entered by: Helen Store: National Medical

Max MOS: 12.0 Threshold MOS: 0.0

Buttons: New line, Add from master list, Delete line(s), Filter items, Supply quantity, Create customer invoice, Print

Data entry Invoices created Log

LI	Item code	Item name	Unit	Our stock on hand	Customer current stock on hand	Customer monthly usage	Customer requested	Already issued	Remaining to supply	Supply this invoice	Comment
1	amc500	Amoxicillin 500mg tab		9000000	30000	5833.33	40000	0	40000	20000	Rationing stock
2	cefz250	Ceftriaxone 250mg inj		8979678	1800	250	5000	0	5000	5000	Recent change in clinical guidelines
3	chp500	Chloroquine phosphate 500mg/5ml, syr...		879607	376	200.333	5000	0	5000	5000	Anticipated higher number of upcoming cases
4	iso300	Isoniazid 300mg tab		875408	18000	7000	40000	0	40000	15000	Recent campaign has finished
5	me250	Mefenquine 250mg tab		7966	290	66.6666	502	0	502	502	
6	par500	Paracetamol 500mg tab		86798996	1892	250	1108	0	1108	1108	
7	rtia7	Rifampicin 150mg + isoniazid 75mg tab		900000	100	75	800	0	800	800	

Buttons: Save Sort order, Finalise, Cancel, OK & Next, OK

**You can also round up or down based on available pack sizes**

You may adjust the **Max MOS** to automatically quantify more or less stock

**Edit requisition...**

Name: Kerang Hospital KID Their ref: From request requis... Black ID: 2  
 Requisition date: 01/02/21 Order Received: 01/02/21 Comment: From request requisition 5 (Order should be placed on SS Demoshop)  
 Status: on Type: response Entry date: 01/02/21 Entered by: Helen Store: National Medical

Max MOS: 12.0 Threshold MOS: 0.0

Buttons: New line, Add from master list, Delete line(s), Filter items, Supply quantity, Create customer invoice, Print

Data entry Invoices created Log

LI	Item code	Item name	Unit	Our stock on hand	Customer current stock on hand	Customer monthly usage	Customer requested	Already issued	Remaining to supply	Supply this invoice	Comment
1	amc500	Amoxicillin 500mg tab		9000000	30000	5833.33	40000	0	40000	20000	Rationing stock
2	cefz250	Ceftriaxone 250mg inj		8979678	1800	250	5000	0	5000	5000	Recent change in clinical guidelines
3	chp500	Chloroquine phosphate 500mg/5ml, syr...		879607	376	200.333	5000	0	5000	5000	Anticipated higher number of upcoming cases
4	iso300	Isoniazid 300mg tab		875408	18000	7000	40000	0	40000	40000	Recent campaign has finished
5	me250	Mefenquine 250mg tab		7966	290	66.6666	502	0	502	500	
6	par500	Paracetamol 500mg tab		86798996	1892	250	1108	0	1108	1200	Rounding up
7	rtia7	Rifampicin 150mg + isoniazid 75mg tab		900000	100	75	800	0	800	800	

Buttons: Save Sort order, Finalise, Cancel, OK & Next, OK

**You may adjust the Max MOS to automatically quantify more or less stock**

- Click **Create Customer Invoice** to convert the requisition to an invoice

Click **Create Customer Invoice** to convert the requisition to an invoice

- Click **Yes**

Click **Yes**

**The Customer Invoice is created!**

The Customer invoice must be finalised for stock to leave the store and be transferred to the customer's store.

The **Customer Invoice** is created



The items in the Customer invoice appear in red. these are called **Placeholder lines** and this means that stock with a specific batch and expiry has not been allocated yet.

The screenshot shows the 'Customer invoice' window. At the top, there are fields for Name (Kerang Hospital), Their ref (KH0), Comment (Invoice from requisition), Confirm date (00/00/00), Category (None), Colour (Black), Invoice (2), Entry date (1/02/2021), Goods received ID (0), Status (ag), Entered by (Helen), and Store (National Medical Warehouse). Below these are buttons for New line, Delete line(s), Backorders, History, and Confirm. The main table has columns: Notes, Line, Location, Item code, Item Name, Quan, Pack Size, Batch, Exp date, Sell Price, and Price extn. The table contains 7 lines, all of which are highlighted in red, indicating they are placeholder lines. The bottom of the window shows 'Other charges' (0.00), 'Customer outstanding balance' (142.50), 'Subtotal' (0.00), '0% tax' (0.00), and 'Total' (0.00). At the very bottom, there are checkboxes for 'Hold' and 'Finalise', an 'Export batch: 0' field, a 'Stock transfer' label, and buttons for 'OK & Next', 'Delete', and 'OK'.

Notes	Line	Location	Item code	Item Name	Quan	Pack Size	Batch	Exp date	Sell Price	Price extn
	1		amo500	Amoxicillin 500mg tab	30000	1	none		0.00	0.00
	2		celh250	Ceftriaxone 250mg inj	5000	1	none		0.00	0.00
	3		chlq50	Chloroquine phosphate 50mg/5mL syrup	5000	1	none		0.00	0.00
	4		iso300	Isoniazid 300mg tab	40000	1	none		0.00	0.00
	5		met250	Mefloquine 250mg tab	500	1	none		0.00	0.00
	6		par500	Paracetamol 500mg tab	1200	1	none		0.00	0.00
	7		atla7	Rifampicin 150mg + isoniazid 75mg tab	800	1	none		0.00	0.00

8. To issue specific stock to the invoice, click the **Magic button** on the bottom left...

This screenshot is identical to the one above, but with a red box highlighting the 'Magic button' (a small icon with a star) located at the bottom left of the table area. The rest of the interface, including the header fields, table content, and footer buttons, remains the same.

9. Click the **Issue stock** for all placeholder lines

New line Delete line(s) Backorders

General Summary by Item Summary by Batch Transport details Log

Notes	Line	Location	Item code	Item Name
	1		amo500t	Amoxicillin 500mg tab
	2		cef250i	Ceftriaxone 250mg inj
	3		chl50s	Chloroquine phosphate 50mg/5mL syrup
	4		iso300t	Isoniazid 300mg tab
	5		mel250t	Mefloquine 250mg tab
	6		par500t	Paracetamol 500mg tab
	7		ri1is7t	Rifampicin 150mg + isoniazid 75mg tab

Other charges Item: Customer outstanding balance

**Issue stock for all placeholder lines**

The next item to expire (FEFO) is automatically allocated to every item line

The line will remain red if the item is not available in stock

Customer invoice

Name: Kerang Hospital Confirm date: 00/00/00 Colour: Black

Their ref: KH00 Invoice: 2 Entry date: 1/02/2021

Comment: Invoice from requisition Category: None Goods received ID: 0

Status: sg 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	amo500t	Amoxicillin 500mg tab	300	100	NGJ900	31/05/2023	0.03	9.00
	2	B1	cef250i	Ceftriaxone 250mg inj	500	10	hjk890	28/02/2027	1.12	560.00
	3	B1	chl50s	Chloroquine phosphate 50mg/5mL syrup	5000	1	DEF456	28/02/2023	2.56	12,800.00
	4	C1	iso300t	Isoniazid 300mg tab	400	100	K&K890	29/02/2024	0.09	36.00
	5	A1	mel250t	Mefloquine 250mg tab	500	1	hjk189	30/04/2024	0.03	15.00
	6	A1	par500t	Paracetamol 500mg tab	1200	1	jH0890	30/04/2026	0.01	12.00
	7	C1	ri1is7t	Rifampicin 150mg + isoniazid 75mg tab	800	1	bluh008	31/12/2023	0.09	72.00

Other charges Item: Amount: 0.00

Customer outstanding balance 142.50

Subtotal: 13,564.00  
0% tax: 0.00  
Total: 13,564.00

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

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

Customer invoice

Name: Kerang Hospital

Confirm date: 06/05/00

Colour: Black

Invoice: 2

Entry date: 15/02/2021

Goods received ID: 0

Status: 49

Entered by: Helen

Store: National Medical Warehouse

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	amc500t	Amoxicillin 500mg tab	300	100	NH/000	31/05/2023	0.00	9.00
	2	B1	ceb250t	Cefixime 250mg tab	500	10	8&890	28/02/2027	1.12	560.00
	3	B1	chl450t	Chloroquine phosphate 50mg/5mL syrup	5000	1	DEF456	28/02/2023	2.56	12,800.00
	4	C1	iso300t	Isoniazid 300mg tab	400	100	K&A999	29/02/2024	0.09	36.00
	5	A1	met250t	Metformin 250mg tab	500	1	h&h103	30/04/2024	0.03	15.00
	6	A1	par500t	Paracetamol 500mg tab	1200	1	p0090	30/04/2026	0.01	12.00
	7	C1	atu7t	Ritampirin 150mg + isoniazid 75mg tab	800	1	blu000	31/12/2023	0.09	72.00

Other charges: 0.00

Customer outstanding balance: 142.50

Amount: 0.00

Subtotal: 13,584.00

0% tax: 0.00

Total: 13,584.00

Hold ☐ Finalise ☐ Export batch: 0

Stock transfer

OK & Next Delete OK

Facility staff pick the stock and prepare the order for delivery

Kerang Hospital

Picking slip: 5

Printed: 15/02/2021

Page 1 of 1

Entered: 15/02/2021

Line	Location	Code	Item	Units	Quantity	Issued	Checked	Pack	Batch	Expiry	Box
1	BLUE	par500t	Paracetamol 500mg tab		420000			1	DHW998	30/11/2022	
2	BLUE	met500t	Metformin 500mg tab		600			1	TSY992	31/12/2028	
3		amo500t	Amoxicillin 500mg tab		300			1	HD3889	31/08/2021	
4	BLUE	ibu200t	Ibuprofen 200mg tab		600			1	DFW778	31/01/2027	

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

mSupply navigator

Customer Suppliers Item Reports Special Admin

Customer invoices Customers Transaction categories

Requisitions New credit Cash receipts Categories

Data File: Demo Land Add

National Medical Warehouse

Helen

mSupply

DEMO LAND

12. Click the **Confirm** button

The screenshot shows the 'Customer invoice' form. At the top, there are fields for 'Name' (Kerang Hospital), 'Confirm date' (00/00/00), 'Colour' (Black), 'Invoice' (2), 'Entry date' (1/02/2021), 'Goods received ID' (0), 'Status' (sg), 'Entered by' (Nelen), and 'Store' (National Medical Warehouse). Below these are buttons for 'New line', 'Delete line(s)', 'Backorders', 'History', and 'Confirm' (highlighted with a red box). The main table lists items with columns: Notes, Line, Location, Item code, Item Name, Quan, Pack Size, Batch, Exp date, Sell Price, and Price exten. The table contains 7 rows of items. At the bottom, there are fields for 'Other charges', 'Item', 'Amount' (0.00), 'Customer outstanding balance' (142.50), 'Subtotal' (13,504.00), '0% tax' (0.00), and 'Total' (13,504.00). There are also checkboxes for 'Hold' and 'Finalise', and buttons for 'Export batch: 0', 'OK & Next', 'Delete', and 'OK'.

Notes	Line	Location	Item code	Item Name	Quan	Pack Size	Batch	Exp date	Sell Price	Price exten
	1	A1	amc500	Amoxicillin 500mg tab	300	100	NB1900	31/05/2023	0.00	9.00
	2	B1	cel250	Cefixime 250mg ix	500	10	KJ8090	28/02/2027	1.12	560.00
	3	B1	chp500	Chloroquine phosphate 500mg/5mL syrup	5000	1	DE7456	26/02/2023	2.56	12,800.00
	4	C1	iso300	Isosized 300mg tab	400	100	KJ8099	29/02/2024	0.09	36.00
	5	A1	mel250	Mefloquine 250mg tab	500	1	h8189	30/04/2024	0.03	15.00
	6	A1	par500	Paracetamol 500mg tab	1200	1	J08900	30/04/2026	0.01	12.00
	7	C1	rta75	Ritampirin 150mg + isosized 75mg tab	800	1	bluh008	31/12/2023	0.09	72.00

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

The stock has now been removed from your inventory. A Supplier invoice will now be waiting at your customer's store in their Supplier invoices list ready for them to accept when the stock arrives

The screenshot shows the 'Customer invoice' form, identical to the previous one, but with the 'Finalise' checkbox checked. The 'Confirm' button is still highlighted with a red box. The 'OK' button at the bottom right is also highlighted with a red box. The 'Export batch: 0' field is now '0'. The 'Subtotal' and 'Total' values remain the same.

## Session 2.2 Customer Invoices

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**

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

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**

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: KHO  
Comment:   
Confirm date: 00/00/00  
Category: None  
Colour: Black  
Invoice: 3  
Entry date: 1/02/2021  
Goods received ID: 0  
Status: inv  
Entered by: Helen  
Store: National Medical Warehouse

Buttons: 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	amo500	Amoxicillin 500mg tab	300	100	NB/900	31/05/2023	0.03	9.00
	2	B1	cef250	Cefixone 250mg inj	100	10	BJ/890	28/02/2027	1.12	112.00
	3	C1	ibu200	Ibuprofen 200mg tab	50	100	HGS/64563	31/01/2023	0.02	1.00
	4	A1	par500	Paracetamol 500mg tab	450	1	p0890	30/04/2026	0.01	4.50

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

Buttons: 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 Invoices

Buttons: Customer Invoices, Customers, Transaction categories, Requests, New credit, Cash receipts, Categories

10. Click the **Confirm** button

Customer invoice

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

Buttons: 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	amo500	Amoxicillin 500mg tab	300	100	NB/900	31/05/2023	0.03	9.00
	2	B1	cef250	Cefixone 250mg inj	100	10	BJ/890	28/02/2027	1.12	112.00
	3	C1	ibu200	Ibuprofen 200mg tab	50	100	HGS/64563	31/01/2023	0.02	1.00
	4	A1	par500	Paracetamol 500mg tab	450	1	p0890	30/04/2026	0.01	4.50

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

Buttons: 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: Kerang Hospital  
 Their ref: KHO  
 Confirm date: 14/02/2021  
 Category: None  
 Colour: Black  
 Invoice: 3  
 Entry date: 14/02/2021  
 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	Quan	Pack Size	Batch	Exp date	Sell Price	Price enter
	1	A1	amc500	Amoxicillin 500mg tab	300	100	NEU200	31/05/2023	0.00	3.00
	2	B1	cef250	Cefixone 250mg inj	100	10	9jg490	28/02/2027	1.12	112.00
	3	C1	ibu200	Ibuprofen 200mg tab	50	100	HESJ14980	31/01/2023	0.02	1.00
	4	A1	par500	Paracetamol 500mg tab	450	1	j0890	30/04/2026	0.08	4.50

Other charges: Item: Amount: 0.00  
 Customer outstanding balance: 0.00

Subtotal: 128.50  
 0% tax: 0.00  
 Total: 128.50

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

Let's go over the process again!

- Navigate to the **Customer** tab

mSupply

File Edit Item Supplier Customer Report Special Help

Customer Suppliers Item Reports Special Admin

Navigate to the Customer tab

Customers Cash receipts Transaction categories Categories

Requisitions New credit

Data File Demo Land Add National Medical Warehouse Helen

mSupply DEMO LAND

- Click the **New Customer Invoice** button

mSupply

File Edit Item Supplier Customer Report Special Help

Customer Suppliers Item Reports Special Admin

New Customer Invoice Customers Cash receipts Transaction categories Categories

Requisitions New credit

Data File Demo Land Add National Medical Warehouse Helen

mSupply DEMO LAND

- Search for the **Customer** name

Customer Invoice

Name: Search for the Customer name  
 Their ref: KHO  
 Confirm date: 14/02/2021  
 Category: None  
 Colour: Black  
 Invoice: 3  
 Entry date: 14/02/2021  
 Goods received ID: 0  
 Status: on  
 Entered by: Helen  
 Store: National Medical Warehouse

General Summary by Item Summary by Batch Transport details Log

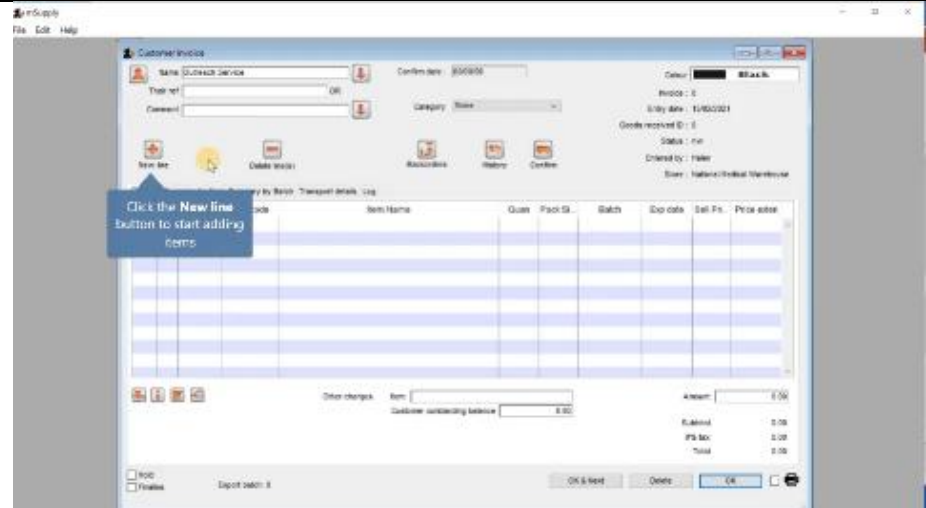
Notes	Line	Location	Item code	Item Name	Quan	Pack Size	Batch	Exp date	Sell Price	Price enter
-------	------	----------	-----------	-----------	------	-----------	-------	----------	------------	-------------

Other charges: Item: Amount: 0.00  
 Customer outstanding balance: 0.00

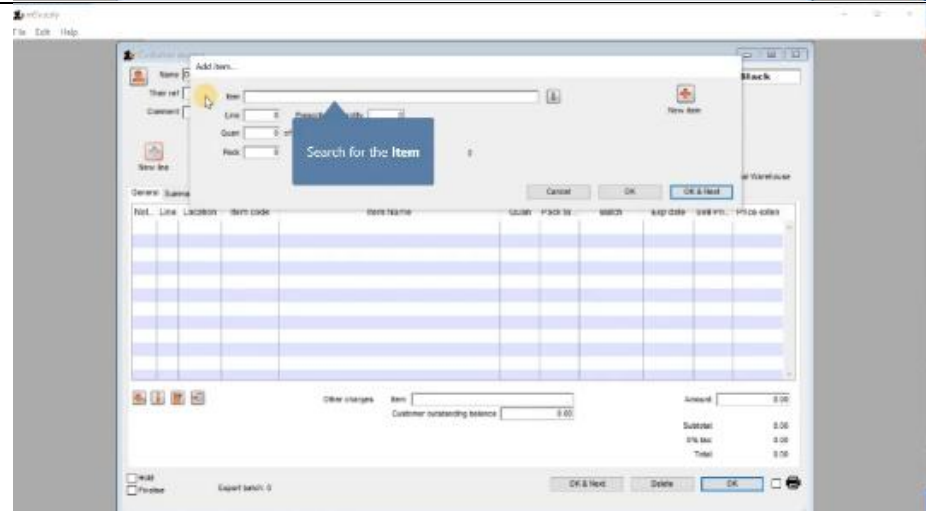
Subtotal: 0.00  
 0% tax: 0.00  
 Total: 0.00

Finalise Export batch: 0 OK & final Delete OK

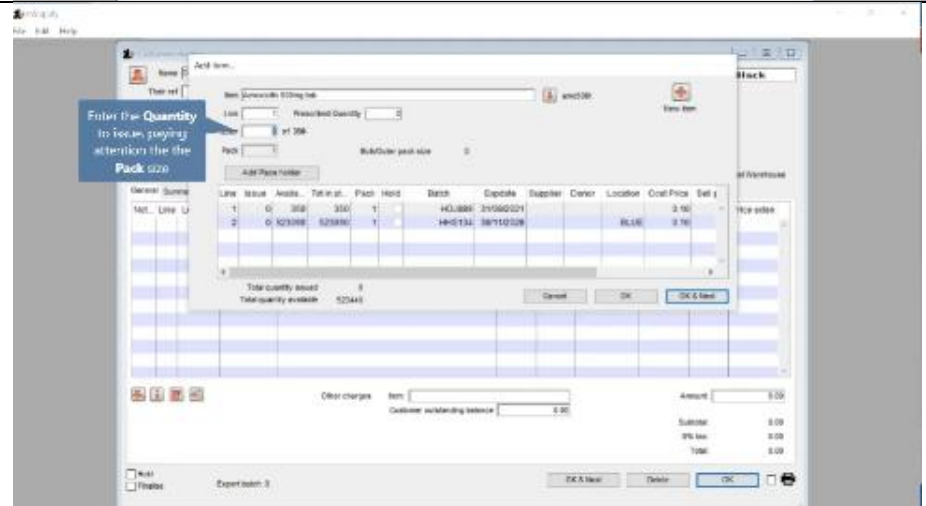
- Click the **New line** button to start adding items



- Search for the **item**



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



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

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

Line	Issue	Avail	Tot in st	Pack	Hold	Batch	Expdate	Supplier	Color	Location	Cost Price	Est
1	0	250	250	1		H0089	311080021				0.90	
2	0	523090	523090	1		H0134	301150028		BLUE		0.90	

Total quantity issued: 0  
Total quantity available: 523440

Other charges: Item: Amount: 0.00  
Customer outstanding balance: 0.00

Subtotal: 0.00  
VAT tax: 0.00  
Total: 0.00

OK & Next

7. Click **OK & Next** to keep adding more items

Click OK & Next to keep adding more items

Line	Issue	Avail	Tot in st	Pack	Hold	Batch	Expdate	Supplier	Color	Location	Cost Price	Est
1	250	0	250	1		H0089	311080021				0.90	
2	0	523090	523090	1		H0134	301150028		BLUE		0.90	

Total quantity issued: 250  
Total quantity available: 523440

Other charges: Item: Amount: 0.00  
Customer outstanding balance: 0.00

Subtotal: 0.00  
VAT tax: 0.00  
Total: 0.00

OK & Next

8. Add the next item...

Add the next item

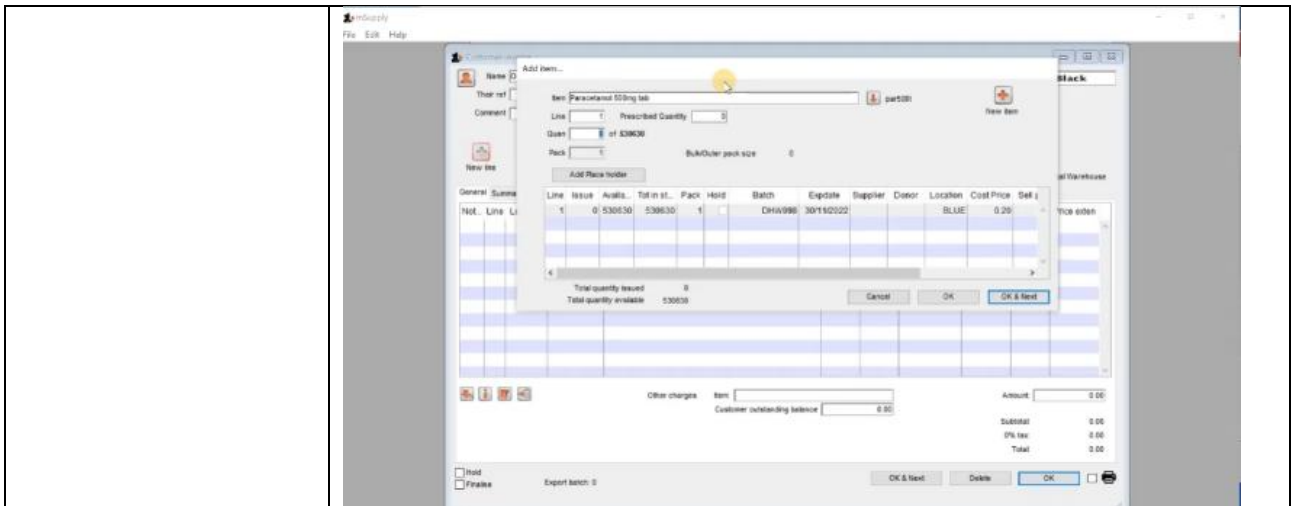
Line	Issue	Avail	Tot in st	Pack	Hold	Batch	Expdate	Supplier	Color	Location	Cost Price	Est
1	0	250	250	1		H0089	311080021				0.90	
2	0	523090	523090	1		H0134	301150028		BLUE		0.90	

Total quantity issued: 0  
Total quantity available: 523440

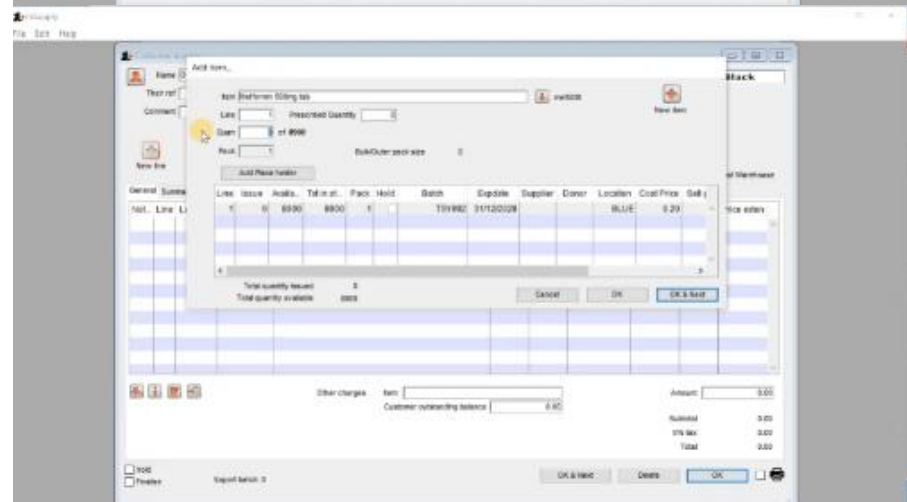
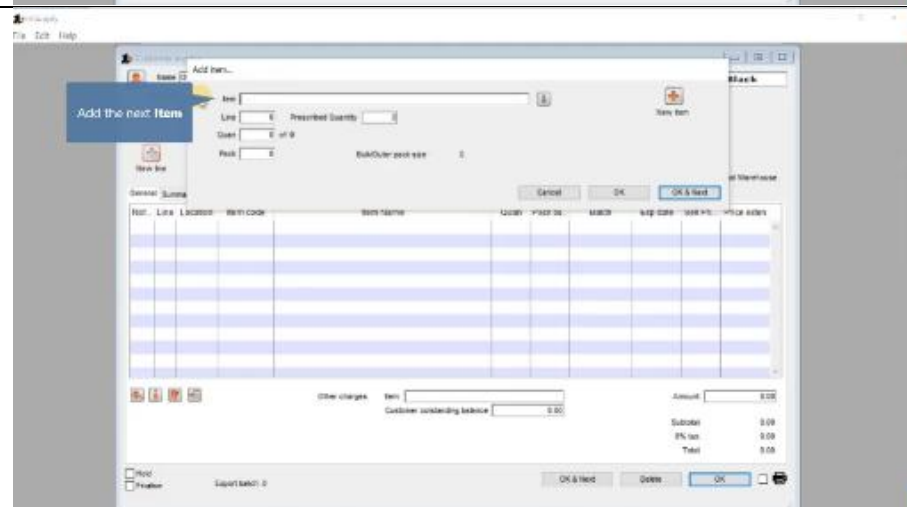
Other charges: Item: Amount: 0.00  
Customer outstanding balance: 0.00

Subtotal: 0.00  
VAT tax: 0.00  
Total: 0.00

OK & Next



Add the next item...



Add the next item...

Item: [ ] Line: [ ] Prescribed Quantity: [ ] Pack: [ ] BulkOrder pack size: [ ]

Line	Issue	Avails	Tot in st	Pack	Hold	Batch	Expiry	Supplier	Conor	Location	Cost Price	Sell
1	0	3368	3368	1		GGD778	30/11/2025			BLUE	0.00	
2	0	5000	5000	1		DLJ778	30/11/2025			BLUE	1.20	

Total quantity issued: 0  
Total quantity available: 3368

Other charges: [ ] Customer outstanding balance: [ ] Amount: [ ]

Subtotal: 0.00  
VAT tax: 0.00  
Total: 0.00

Item: [ ] Line: [ ] Prescribed Quantity: [ ] Pack: [ ] BulkOrder pack size: [ ]

Line	Issue	Avails	Tot in st	Pack	Hold	Batch	Expiry	Supplier	Conor	Location	Cost Price	Sell
1	0	3368	3368	1		GGD778	30/11/2025			BLUE	0.00	
2	0	5000	5000	1		DLJ778	30/11/2025			BLUE	1.20	

Total quantity issued: 0  
Total quantity available: 3368

Other charges: [ ] Customer outstanding balance: [ ] Amount: [ ]

Subtotal: 0.00  
VAT tax: 0.00  
Total: 0.00

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

Item: [ ] Line: [ ] Prescribed Quantity: [ ] Pack: [ ] BulkOrder pack size: [ ]

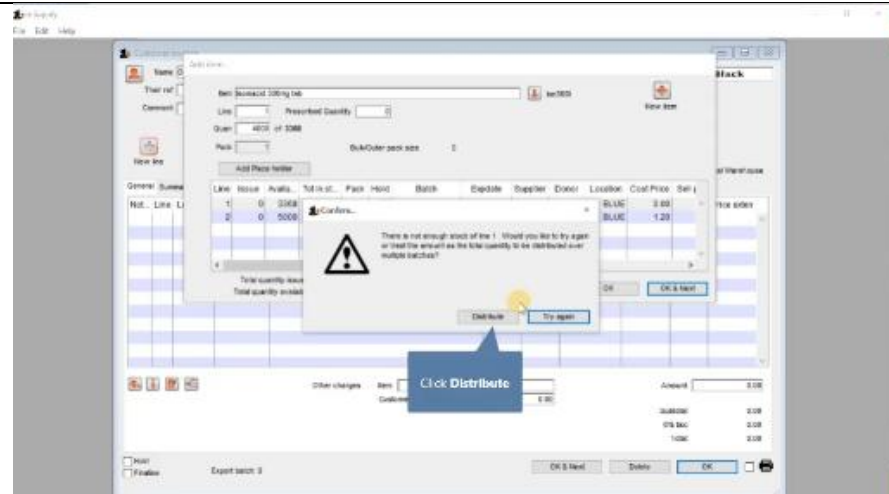
Line	Issue	Avails	Tot in st	Pack	Hold	Batch	Expiry	Supplier	Conor	Location	Cost Price	Sell
1	0	3368	3368	1		GGD778	30/11/2025			BLUE	0.00	
2	0	5000	5000	1		DLJ778	30/11/2025			BLUE	1.20	

Total quantity issued: 0  
Total quantity available: 3368

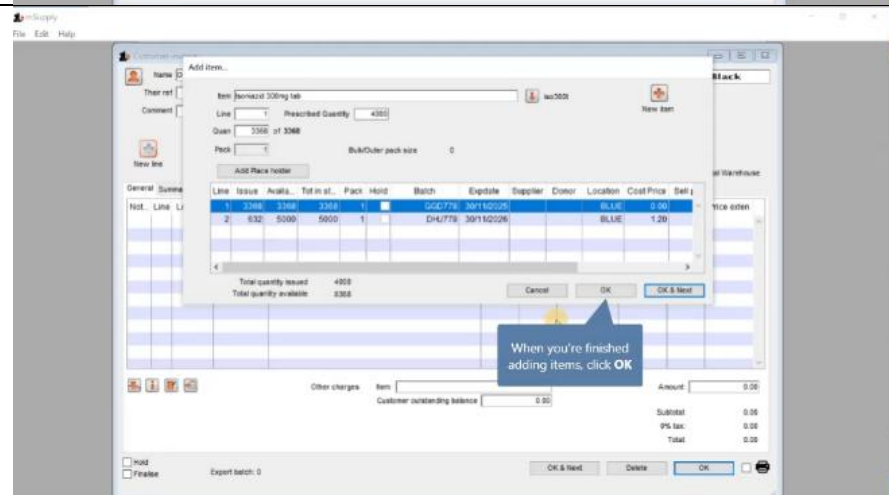
Other charges: [ ] Customer outstanding balance: [ ] Amount: [ ]

Subtotal: 0.00  
VAT tax: 0.00  
Total: 0.00

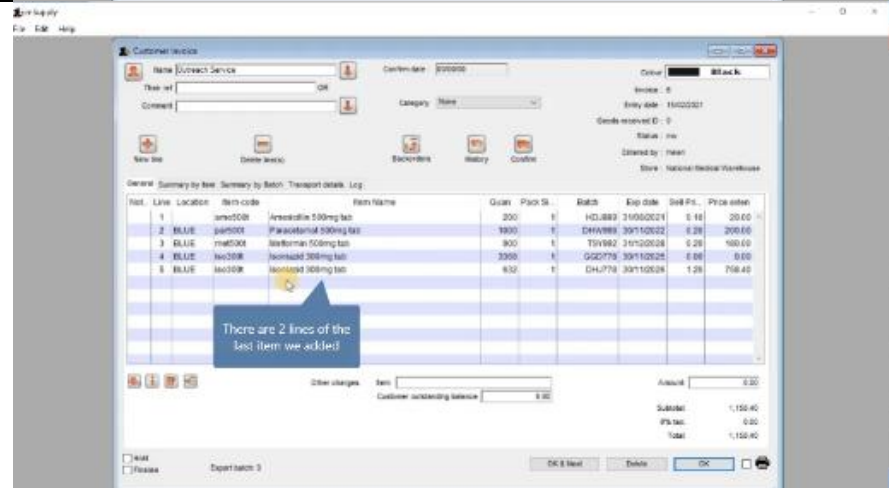
9. Click **Distribute**



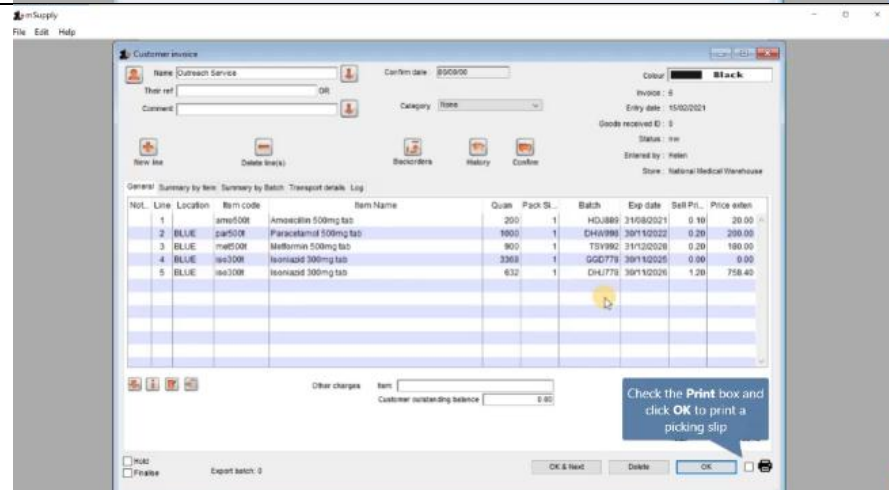
10. When you finish adding items, click **OK**



There are 2 lines of the last item we added!



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





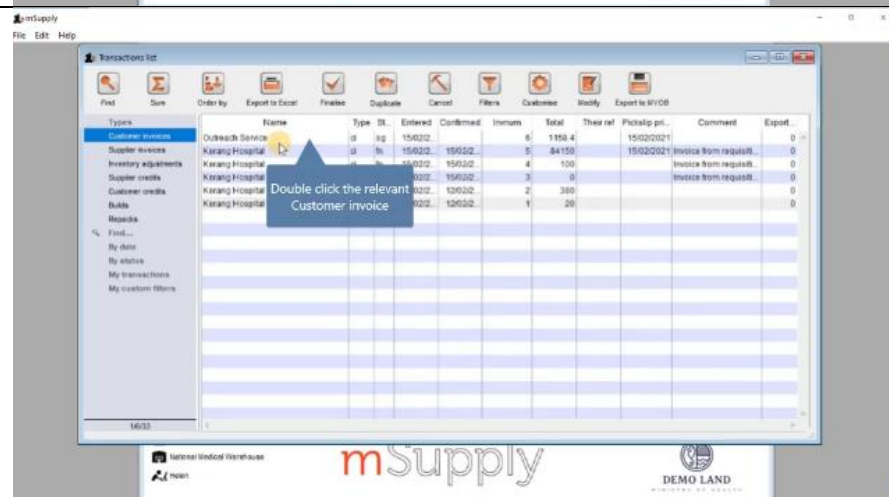
12. Find the **Customer Invoice** in the list



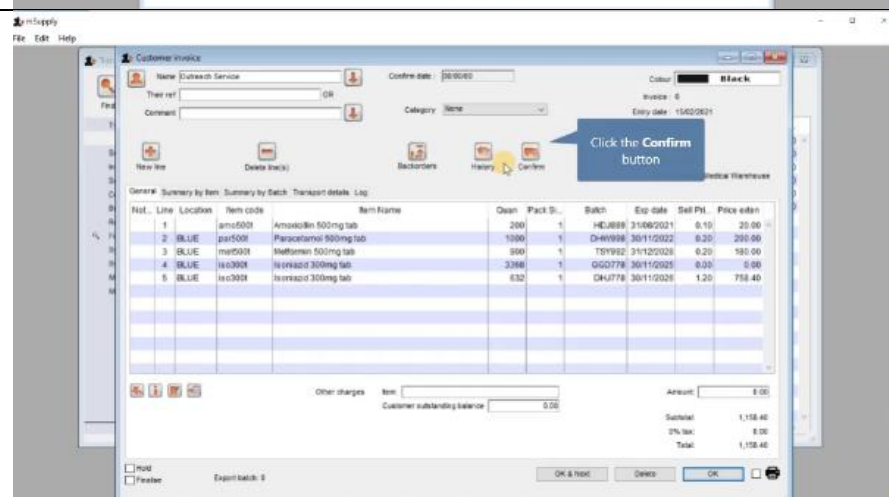
13. Click **Find**



14. Double click the relevant Customer invoice

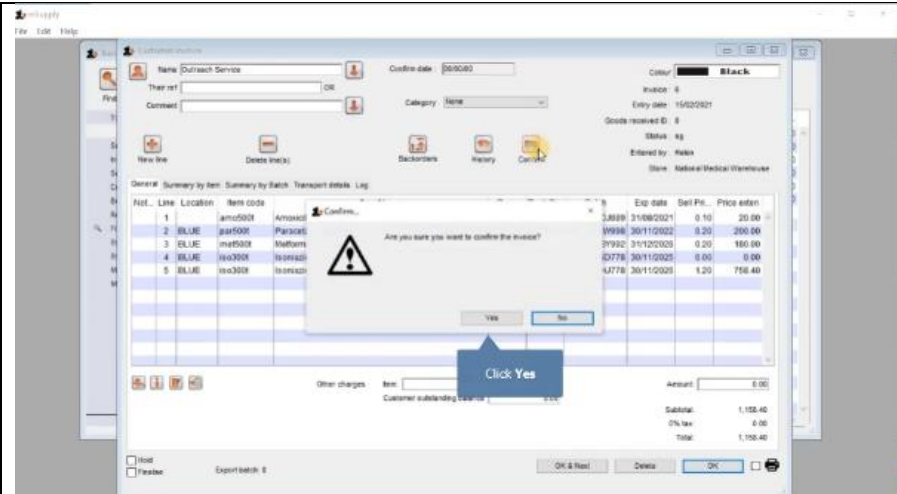


15. Click the **Confirm** button

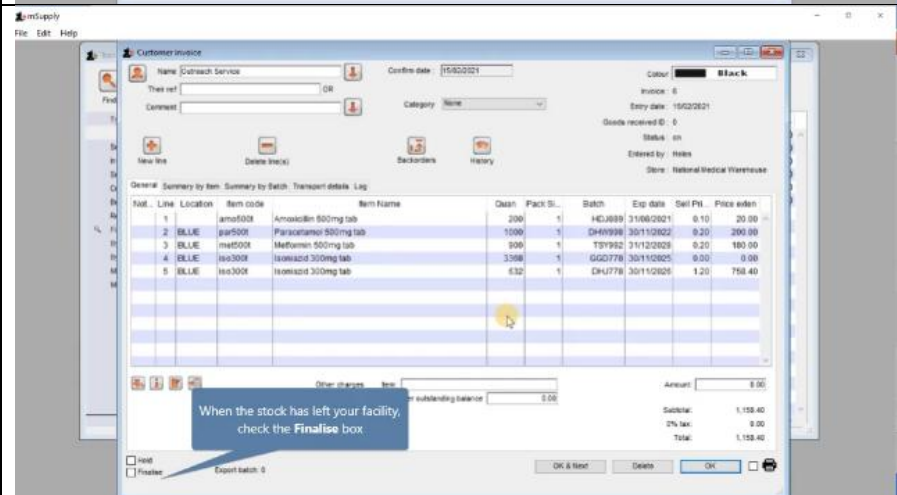




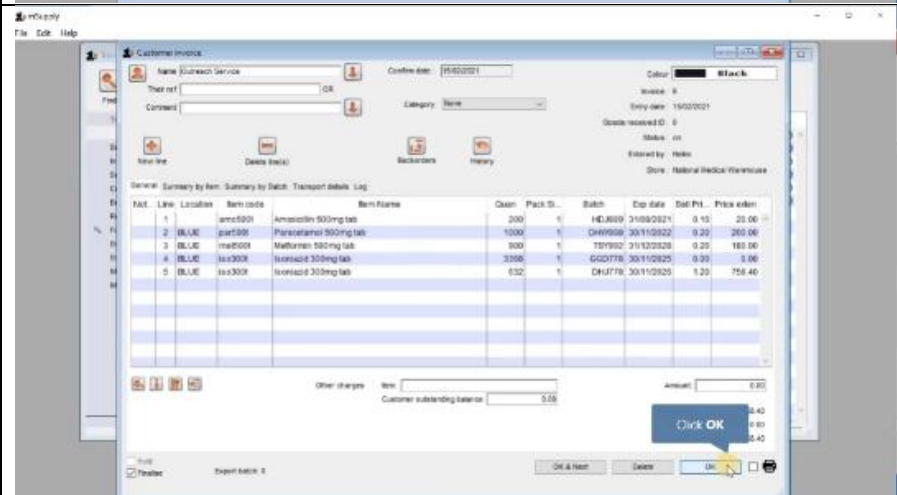
16. Click **Yes**



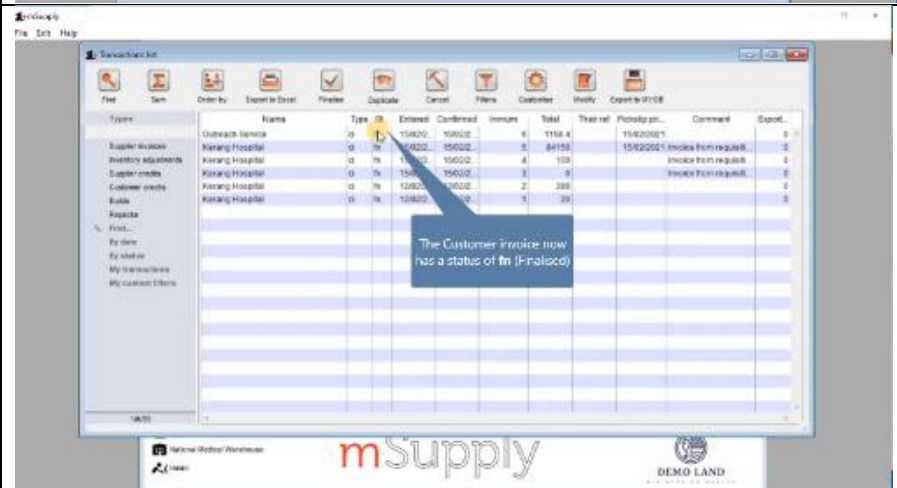
17. When the stock has left your facility, check the **Finalise** box



18. Click **OK**



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.

## Session 2.3 Picking slips

Picking slips are printed from your Customer invoice before it is Confirmed.  
There are two standard picking slip formats in mSupply: **Portrait** and **Landscape**.

### **Basic process for picking stock**

**Train:** staff should be trained and retrained to carefully follow the picking slip.

**Sort:** the picking slip should select automatically sort itself by location to make it easy to pick stock.

**Select:** select the correct batch in the correct quantity from the correct location.

**Annotate:** annotate the picking slip if there are any problems or errors.

**Sign:** sign the picking slip for each item as it is picked off the shelves. Gather the items on a bench/area.

**Double check:** the picking should be double checked and countersigned by another staff member.

**Once the order has physically left the facility, you can finalise the Customer invoice!**

1. Check the **Print** checkbox

The screenshot shows the 'Picking Slips' window. At the top, there is a table with columns for item details. Below the table, there is a summary section with the following values: Amount: 0.00, Subtotal: 29.00, 0 % tax: 0.00, and Total: 29.00. At the bottom left, there is a button labeled 'OK & Next'. At the bottom right, there is a checkbox labeled 'Print' which is currently unchecked. A callout box labeled 'Step 1' with the text 'Check the Print checkbox' points to the 'Print' checkbox. There is also a printer icon next to the checkbox.

2. Click **OK**

The screenshot shows the 'Picking Slips' window. The summary section at the top right shows the same values as the previous screenshot: Amount: 0.00, Subtotal: 29.00, 0 % tax: 0.00, and Total: 29.00. At the bottom left, there is a button labeled 'OK'. At the bottom right, there is a checkbox labeled 'Print' which is now checked. A callout box labeled 'Step 2' with the text 'Click OK' points to the 'OK' button. There is also a printer icon next to the checkbox.

## Session 2.4 Cash Receipts

When a customer pays for items on a Customer invoice, you can record this payment in mSupply. The Customer invoice must contain items with **prices** attached to them and be **finalised**.

Customers don't necessarily have to pay you directly in order for you to record their payment in mSupply. Some settings have an account officer who notifies you of a payment being received via a bank statement.

1. Navigate to the **Customer** tab, then click the **New Cash receipt** button



2. Search for the customer **Name**

The screenshot shows the 'Cash receipts' form in mSupply. The 'Name' field at the top is highlighted with an orange box. The form includes fields for 'Cheque #', 'Note', 'Receipt currency' (set to USD), 'Currency rate' (set to 1.00), 'Receipt' (set to 0.00), 'Entered by' (Helen), 'Entered date' (1/02/2021), 'Confirm date' (1/02/2021), 'Invoice No.' (0), 'Status' (nw), and 'Store' (National Medical Warehouse). Below these fields is a table with columns: Entry date, Confirm date, Invoice, Ther rel, Comment, Total, Currency, Outstanding, and Payment. At the bottom, there are summary fields: 'Total outstanding' (0.00), 'To allocate' (0.00), 'Allocated' (0.00), 'Allocated in local currency' (0.00), and 'Total payment in local currency' (0.00). Buttons for 'OK & Next', 'Cancel', and 'OK' are at the bottom right.

3. A list of all the customer's outstanding payments owed to you in the default **Receipt currency** will appear

You can select a different Receipt currency from the dropdown list if the customer owes you in more than one currency

**Cash receipts**

Name: Kerang Hospital KHO Entered by: Helen Invoice No.: 0  
 Cheque #: Entered date: 1/02/2021 Status: new  
 Note: Confirm date: 1/02/2021 Store: National Medica  
 Receipt currency: USD Currency rate: 1.00  
 Receipt: 0.00

Disabled lines below are in a different currency

Entry date	Confirm date	Invoice	Ther ref	Comment	Total	Currency	Outstanding	Payment
1/02/2021	1/02/2021	3			126.5	USD	126.5	0
1/02/2021	1/02/2021	4			16	USD	16	0

Double-click lines to enter payment amount  
 Hold down shift to allocate whole invoice amount

Total outstanding: 142.50  
 To allocate: 0.00  
 Allocated: 0.00  
 Allocated in local currency: 0.00

Total payment in local currency: 0.00

OK & Next Cancel OK

4. You can view the customer's **Total outstanding** amount owed you.

This is also displayed by currency.

**Cash receipts**

Name: Kerang Hospital KHO Entered by: Helen Invoice No.: 0  
 Cheque #: Entered date: 1/02/2021 Status: new  
 Note: Confirm date: 1/02/2021 Store: National Medica  
 Receipt currency: USD Currency rate: 1.00  
 Receipt: 0.00

Disabled lines below are in a different currency

Entry date	Confirm date	Invoice	Ther ref	Comment	Total	Currency	Outstanding	Payment
1/02/2021	1/02/2021	3			126.5	USD	126.5	0
1/02/2021	1/02/2021	4			16	USD	16	0

Double-click lines to enter payment amount  
 Hold down shift to allocate whole invoice amount

Total outstanding: 142.50  
 To allocate: 0.00  
 Allocated: 0.00  
 Allocated in local currency: 0.00

Total payment in local currency: 0.00

OK & Next Cancel OK

5. Enter the amount you are receiving in the **Receipt** field

Remember to select the Receipt currency if applicable

**Cash receipts**

Name: Kerang Hospital KHO Entered by: Helen Invoice No.: 0  
 Cheque #: Entered date: 1/02/2021 Status: new  
 Note: Confirm date: 1/02/2021 Store: National Medica  
 Receipt currency: USD Currency rate: 1.00  
 Receipt: 126.50

Disabled lines below are in a different currency

Entry date	Confirm date	Invoice	Ther ref	Comment	Total	Currency	Outstanding	Payment
1/02/2021	1/02/2021	3			126.5	USD	126.5	0
1/02/2021	1/02/2021	4			16	USD	16	0

Double-click lines to enter payment amount  
 Hold down shift to allocate whole invoice amount

Total outstanding: 142.50  
 To allocate: 0.00  
 Allocated: 0.00  
 Allocated in local currency: 0.00

Total payment in local currency: 0.00

OK & Next Cancel OK

6. If the customer is making a general payment against their account, click Distribute to allocate it across multiple invoices, beginning with the oldest owing line.

If they are paying off a specific Customer invoice, double click that line

The 'Cash receipts' window shows the following details:

- Name: Kerang Hospital, KHO
- Entered by: Helen
- Invoice No.: 0
- Entered date: 1/02/2021
- Status: nw
- Confirm date: 1/02/2021
- Store: National Medical
- Receipt currency: USD
- Currency rate: 1.00
- Receipt: 126.50

The 'Distribute' button is highlighted. Below it, a table lists invoices:

Entry date	Confirm date	Invoice	Thoir ref	Comment	Total	Currency	Outstanding	Payment
1/02/2021	1/02/2021	3			126.5	USD	126.5	0
1/02/2021	1/02/2021	4			16	USD	16	0

At the bottom right, the 'Total payment in local currency' field is set to 126.50.

7. Enter the amount the customer is paying for that customer invoice

Partial payments may also be accepted

The 'Enter Information' dialog box prompts the user to 'Enter amount to allocate.' The input field contains the value 126.5.

8. The amount entered will now appear against the specific invoice line you selected, and the **Total payment in local currency** field will update

Click **OK** to save the payment

Once you click **OK**, the payment is finalized. You can review the cash receipt but it can no longer be edited.


The 'Cash receipts' window now shows the payment allocated to the first invoice line:

Entry date	Confirm date	Invoice	Thoir ref	Comment	Total	Currency	Outstanding	Payment
1/02/2021	1/02/2021	3			126.5	USD	126.5	126.5
1/02/2021	1/02/2021	4			16	USD	16	0

The 'Total payment in local currency' field at the bottom right is now 126.50.

You can review previously entered payments...

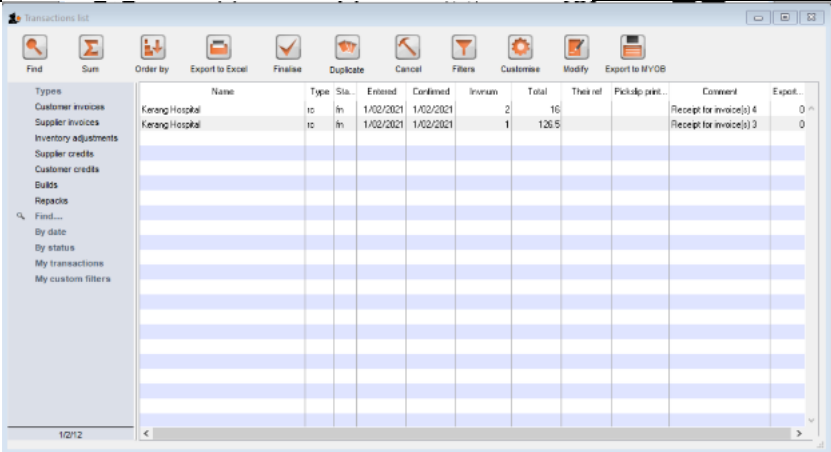
1. Click the **Cash receipts** button



The mSupply Navigator home screen shows various functional buttons. The 'Cash receipts' button, which includes a dollar sign icon, is highlighted with a red box.

2. Double click a line item to view the Cash receipt

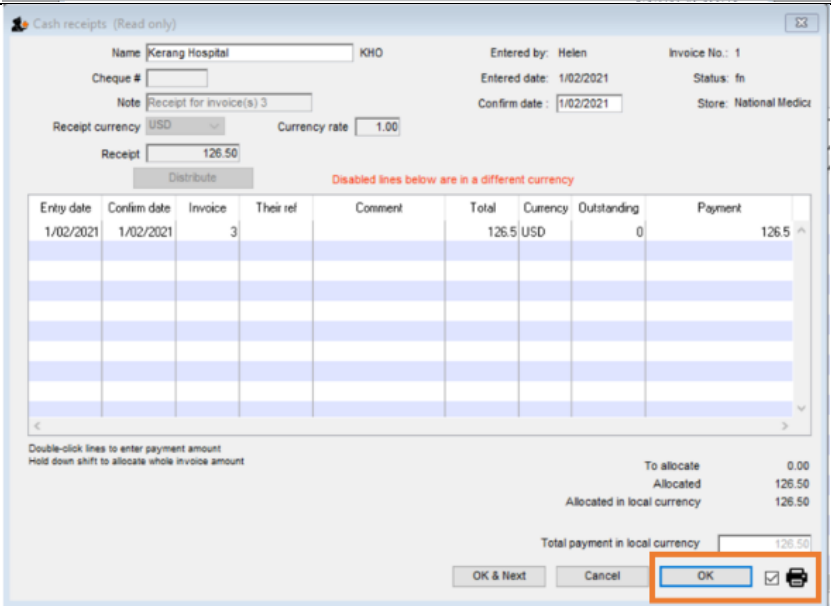
Note the status of Cash receipts is **finalized (fn)** and so cannot be edited.



The Transactions List window displays a table of transactions. The 'Status' column shows 'fn' (finalized) for the selected entry. The 'Entered' and 'Confirmed' dates are both 1/02/2021.

Name	Type	Sta.	Entered	Confirmed	Invo num	Total	Their ref	Pickup part...	Comment	Expt...
Kerang Hospital	ic	fn	1/02/2021	1/02/2021	2	16			Receipt for invoice(s) 4	0
Kerang Hospital	ic	fn	1/02/2021	1/02/2021	1	126.5			Receipt for invoice(s) 3	0

3. If you wish to print a receipt, check the **Print** box before clicking **OK**



The 'Cash receipts (Read only)' window shows details for a receipt from Kerang Hospital. The 'Status' is 'fn'. The 'Receipt' amount is 126.50 USD. The 'Print' checkbox is checked, and the 'OK' button is highlighted with a red box.

Entry date	Confirm date	Invoice	Their ref	Comment	Total	Currency	Outstanding	Payment
1/02/2021	1/02/2021	3			126.5	USD	0	126.5

At the bottom right, the 'Print' checkbox is checked, and the 'OK' button is highlighted with a red box.



## Session 2.5 Customer Credits

Sometimes your customers will need to return stock to you, due to damage, short-dated stock, too much stock etc.

For a customer that also uses mSupply, the customer creates a **Customer invoice** which appears at your store as a **Supplier invoice**. This allows a **Stock transfer** to occur in mSupply, removing the stock from the customer's store and transferring it back to the supplier's store.

For a customer that does not use mSupply, you either enter a **Supplier invoice** manually or enter a **Customer credit** if you wish to give the customer a financial credit.

To create a **Customer credit**...

1. Navigate to the **Customer** tab and click the **New credit** button



2. Find the **Name** of the customer returning the goods

You can then record returned items in two ways by either clicking **New line** or **History**

The image shows the 'Customer credit' form in mSupply. The 'Name' field is highlighted with a red box and contains 'Kerang Hospital'. Other fields include 'Their ref', 'Comment', 'Confirm date', 'Category', 'Colour', 'Invoice', 'Entry date', 'Goods received ID', 'Status', 'Entered by', and 'Store'. Below these fields are buttons for 'New line' (highlighted with a red box), 'Delete line(s)', and 'History' (highlighted with a red box). The form also has a table with columns: Notes, Line, Location, Item code, Item Name, Quan, Pack Size, Batch, Exp date, Sell Price, and Price exten. At the bottom, there are fields for 'Other charges', 'Item', 'Amount', 'Customer outstanding balance', 'Subtotal', '0% tax', 'Total', and buttons for 'Hold', 'Finalise', 'Export batch', 'OK & Next', 'Delete', and 'OK'.

3. If you click **New line**, you must manually add each **item** and its **Batch**, **Expiry**, **Quantity** and **Cost**, then click **OK**

4. If you click **History**, you can see a list of all items previously supplied to that customer. You can select items and specify the **Quantity** being returned, then click **Add to credit**

This is a faster and more accurate way of recording returned stock, it automatically adds item details including batch, expiry and price

Date	Number	Prescriber	Item	Quantity	Directions
1/02/2021	3		Amoxicillin 500mg tab	300	
1/02/2021	4		Amoxicillin 500mg tab	100	
1/02/2021	3		Ceftriaxone 250mg inj	100	
1/02/2021	3		Ibuprofen 200mg tab	50	
1/02/2021	4		Ibuprofen 200mg tab	250	
1/02/2021	3		Paracetamol 500mg tab	450	
1/02/2021	4		Primaquine diphosphate 7.5mg tab	200	


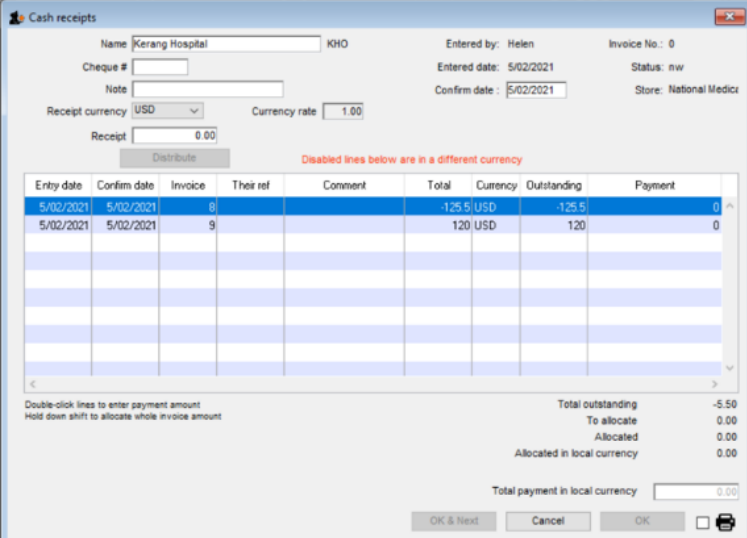
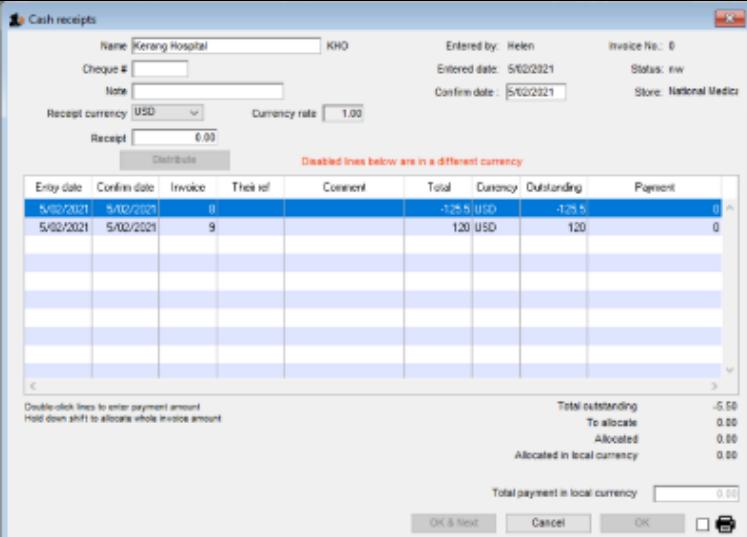
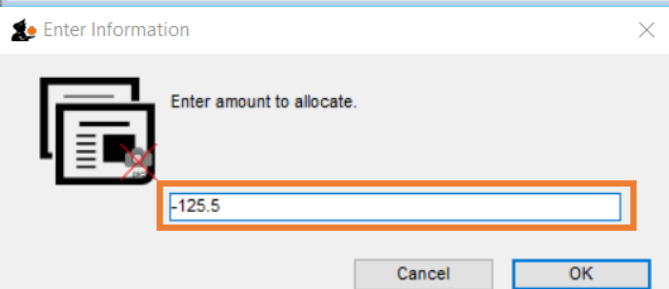
5. All items being returned are shown. When you are sure everything is correct, check the **finalise** box and click **OK**. You can print a record of the credit by checking the **Print** box before clicking **OK**

Returned stock has now been recorded and added to your inventory!

Notes	Line	Location	Item code	Item Name	Quan	Pack Size	Batch	Exp date	Sell Price	Price exten
	1	B1	cef250i	Ceftriaxone 250mg inj	100	10	848090	28/02/2027	1.12	-112.00
	2	C1	ibu200i	Ibuprofen 200mg tab	50	100	HGSJ64583	31/01/2023	0.02	-1.00
	3	A1	pa500i	Paracetamol 500mg tab	450	1	p0890	30/04/2026	0.01	-4.50
	4	B1	pi75t	Primaquine diphosphate 7.5mg tab	200	1	H40898	31/08/2024	0.04	-8.00

When entering a Customer credit, two things happen:

- Returned stock is added to your inventory
- mSupply automatically creates a financial credit in the customer's favour

<div>1. Navigate to the Customer tab, then click the <b>New Cash receipt</b> button</div>	<div></div>																											
<div>2. Find the customer's <b>Name</b></div> <div>All outstanding payments <b>and</b> credits will appear. <b>Outstanding invoices are positive</b> numbers while <b>Credits are negative</b> numbers</div>	<div><table><thead><tr><th>Entry date</th><th>Confirm date</th><th>Invoice</th><th>Their ref</th><th>Comment</th><th>Total</th><th>Currency</th><th>Outstanding</th><th>Payment</th></tr></thead><tbody><tr><td>5/02/2021</td><td>5/02/2021</td><td>8</td><td></td><td></td><td>-125.5</td><td>USD</td><td>-125.5</td><td>0</td></tr><tr><td>5/02/2021</td><td>5/02/2021</td><td>9</td><td></td><td></td><td>120</td><td>USD</td><td>120</td><td>0</td></tr></tbody></table></div>	Entry date	Confirm date	Invoice	Their ref	Comment	Total	Currency	Outstanding	Payment	5/02/2021	5/02/2021	8			-125.5	USD	-125.5	0	5/02/2021	5/02/2021	9			120	USD	120	0
Entry date	Confirm date	Invoice	Their ref	Comment	Total	Currency	Outstanding	Payment																				
5/02/2021	5/02/2021	8			-125.5	USD	-125.5	0																				
5/02/2021	5/02/2021	9			120	USD	120	0																				
<div>3. Double click the credit line</div>	<div></div>																											
<div>4. The credit value is shown</div> <div>Enter the <b>Amount to allocate</b> to another invoice</div>	<div></div>																											

5. In the bottom right corner, the amount **To allocate** to outstanding invoices is shown

Double click the outstanding invoice line you wish to allocate that amount against

**Cash receipts**

Name: Kerang Hospital KHO Entered by: Helen Invoice No.: 0  
 Cheque #: Entered date: 5/02/2021 Status: n/w  
 Note: Confirm date: 5/02/2021 Store: National Medical  
 Receipt currency: USD Currency rate: 1.00  
 Receipt: 0.00

Distribute Disabled lines below are in a different currency

Entry date	Confirm date	Invoice	Their ref	Comment	Total	Currency	Outstanding	Payment
5/02/2021	5/02/2021	8			-125.5	USD	-125.5	-120
5/02/2021	5/02/2021	9			120	USD	120	0

Double-click lines to enter payment amount  
 Hold down shift to allocate whole invoice amount

Total outstanding: -5.50  
 To allocate: 120.00  
 Allocated: -120.00  
 Allocated in local currency: -120.00

Total payment in local currency: 0.00

OK & Next Cancel OK

6. Enter the **Amount** to pay against that invoice line

**Enter Information**

Enter amount to allocate.

120

Cancel OK

7. The credit has now been applied to the outstanding invoice line

The **Total outstanding** balance as shown will remain available to credit against future invoices

Click **OK** to finalise the payment.

**Cash receipts**

Name: Kerang Hospital KHO Entered by: Helen Invoice No.: 0  
 Cheque #: Entered date: 5/02/2021 Status: n/w  
 Note: Confirm date: 5/02/2021 Store: National Medical  
 Receipt currency: USD Currency rate: 1.00  
 Receipt: 0.00

Distribute Disabled lines below are in a different currency

Entry date	Confirm date	Invoice	Their ref	Comment	Total	Currency	Outstanding	Payment
5/02/2021	5/02/2021	8			-125.5	USD	-125.5	-120
5/02/2021	5/02/2021	9			120	USD	120	120

Double-click lines to enter payment amount  
 Hold down shift to allocate whole invoice amount

Total outstanding: -5.50  
 To allocate: 0.00  
 Allocated: 0.00  
 Allocated in local currency: 0.00

Total payment in local currency: 0.00

OK & Next Cancel **OK**

## Session 2.6 Dispensary Mode vs Store Mode

Each mSupply store is set up in of two modes:

- Store mode used in facilities that do not dispense to individual patients
- Dispensary mode used in facilities that dispense items to individual patients

On the Dispensary mode,

- The Patient tab replaces the Customer tab
- Patient replaces Customer on the menu bar
- The Patient tab contains all the same functions as the Customer tab with a few extra buttons that allow you to dispense prescriptions
- A facility using Dispensary mode can perform all the same functions as one using Store mode with the added ability to dispense items to individual patients

The **Patient** tab replaces the **Customer** tab

**Patient** replaces **Customer** on the menu bar



## Session 2.7 Prescribers

Prescribers are authorized health professionals who prescribe medicines and other health supplies to patients. We can dispense the prescriptions in mSupply.

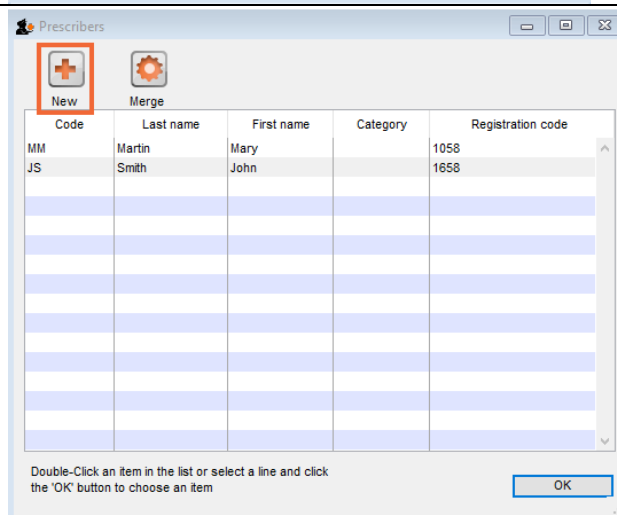
### To add and edit Prescribers,

1. Navigate to the **Special** tab and click the **Prescribers** button



2. A list of Prescribers in your store will open

You can  
 --**Edit** a Prescriber's details by double-clicking on their name or  
 --**Add** a new Prescriber by clicking the **New** button



3. Enter the Prescriber's **Code**, **Last Name**, **First Name**, and **Initials**, then click **OK**

All other fields are optional.

Active ☒ Inactive ☐

Code:

Last name:

First name:

Initials:

Registration code:

Category:

Address 1:

Address 2:

Phone:

Mobile:

email:

☐ Female ☒ Male

Cancel

**The new prescriber has been added!**

You can also add a new prescriber in the prescription dispensing window.

The screenshot shows a window titled 'Prescribers' with a toolbar containing a plus icon and a gear icon. Below the toolbar are two buttons: 'New' and 'Merge'. The main area is a table with the following columns: Code, Last name, First name, Category, and Registration code. The table contains three rows of data: MM, Martin, Mary, 1058; JS, Smith, John, 1558; and TJ, Jones, Tom, . Below the table are several empty rows. At the bottom of the window, there is a text instruction: 'Double-Click on item in the list or select a line and click the "OK" button to choose an item.' and an 'OK' button.

Code	Last name	First name	Category	Registration code
MM	Martin	Mary		1058
JS	Smith	John		1558
TJ	Jones	Tom		

Double-Click on item in the list or select a line and click the "OK" button to choose an item.

OK



## Session 2.8 Patients

Patients are individual people who receive dispensed items from a prescription. You can track a patient's dispensing history, allergies, payments, and notes in mSupply.

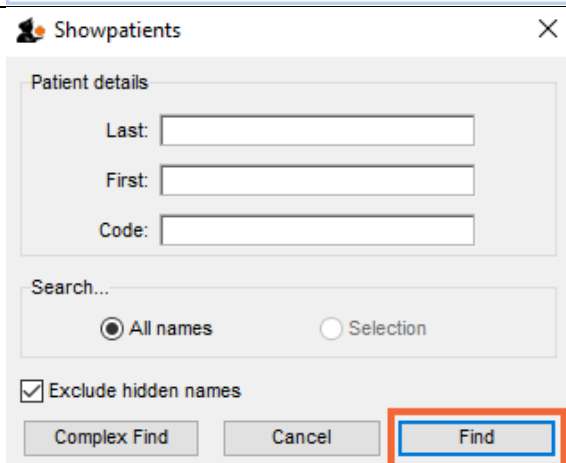
To find and edit **Patients** who are already in mSupply,

1. Navigate to the **Patients** tab and click the **Patient list** button

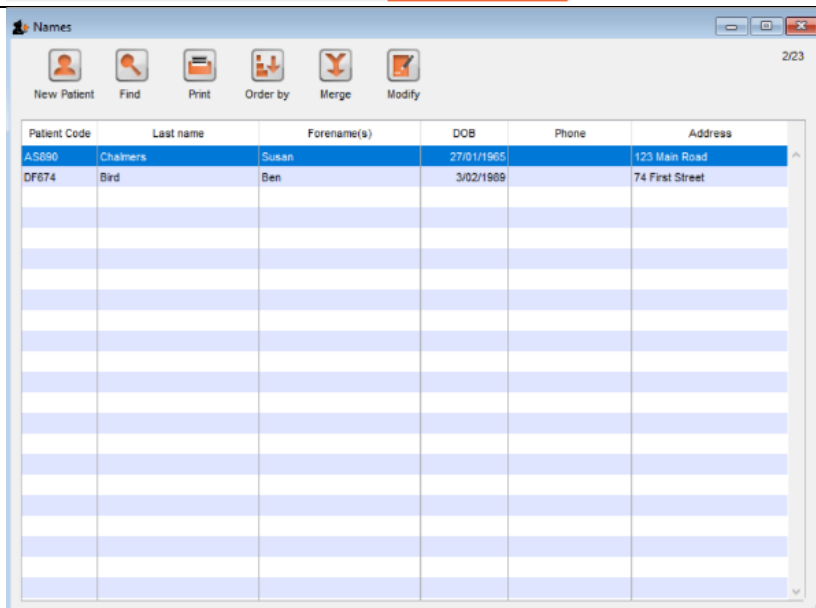


2. Search for the patient by **Last Name, First Name** and/or **Code** and click **Find**

If you leave everything blank and click **Find**, a list of all patients will appear



3. Double click on the patient name that you want to view or edit



4. Edit the patient's details as required, then click **OK**

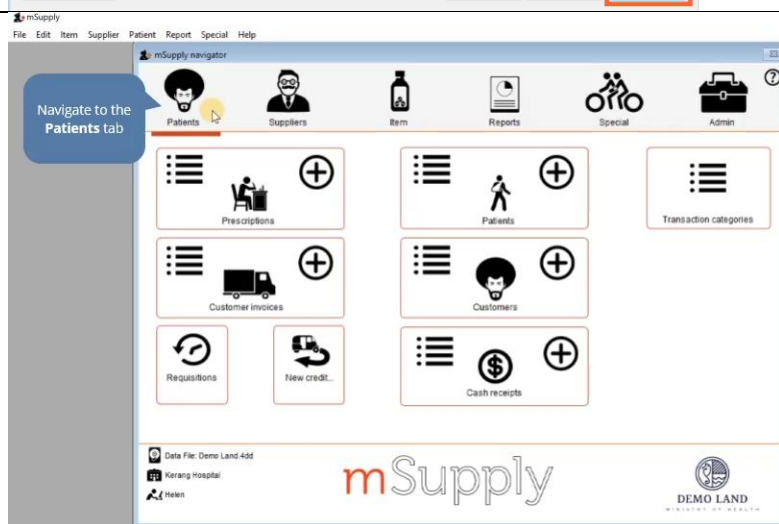
The 'Edit patient' form in mSupply includes the following sections:

- General:** Name, Code, Last, First, Date of birth, Age, Sex (Female/Male), Price Category.
- Restriction:** Hold-do not issue, Credit limit.
- Contact:** Email, Web site, Phone, Fax.
- Other:** Category 1-6, Custom 1-3.
- Main/Billing Address:** Address 1, Address 2, Country, Lat, Long, View on Map.

The 'OK' button is highlighted with a red box.

To add a new patient,

1. Navigate too the **Patients** tab



2. Click the **New Patient** button



3. Enter the patient's details

The screenshot shows the 'New Patient' form in the mSupply application. A blue callout bubble with the text 'Enter the patient's details' points to the 'Name' section, which includes fields for Code, Last, and First. Other visible fields include Date of birth, Age, Sex, Price Category, Restriction, Credit limit, Contact (email, web site, phone, fax), Other (Categories 1-6, Flag, Comment), and Billing Address (Address 1, Address 2, Country, Lat, Long).

4. At the minimum, you must enter the patient **Code, Last and First** names

This screenshot is similar to the previous one but includes a blue callout bubble pointing to the 'Code', 'Last', and 'First' name fields. The text in the bubble reads: 'At a minimum, you must enter the patient Code, Last and First names'.

5. However, best practice is too enter at least **3 unique identifiers** such as

This screenshot is similar to the previous ones but includes a blue callout bubble pointing to the 'Code', 'Last', and 'First' name fields. The text in the bubble reads: 'However, best practice is to enter at least 3 unique identifiers such as...'. The 'Code' field is highlighted with a yellow cursor.

Date of birth or Age...

The screenshot shows the 'New Patient' form in the mSupply application. A blue callout bubble with the text 'Date of birth or Age...' points to the 'Date of birth' and 'Age' fields. The 'Date of birth' field contains '01/09/2008' and the 'Age' field contains '25.79'. Other visible fields include 'Name' (Last: Johnson, First: John), 'Sex' (Male), 'Price Category' (A), 'Restriction' (HIS - do not issue), 'Credit limit' (0 USD), 'Contact' (email, web site, phone, fax), 'Other' (Category 1-6), 'Main/Billing Address' (Address 1, Address 2, Country), and 'View on Map'.

Address...

The screenshot shows the 'New Patient' form in the mSupply application. A blue callout bubble with the text 'Address' points to the 'Main/Billing Address' section. The 'Address 1' field contains '1'. Other visible fields include 'Name' (Last: Johnson, First: John), 'Sex' (Male), 'Price Category' (A), 'Restriction' (HIS - do not issue), 'Credit limit' (0 USD), 'Contact' (email, web site, phone, fax), 'Other' (Category 1-6), and 'View on Map'.

E-mail or Phone number..

The screenshot shows the 'New Patient' form in the mSupply application. A blue callout bubble with the text 'Email or Phone number' points to the 'Contact' section. The 'email' field is highlighted. Other visible fields include 'Name' (Last: Johnson, First: John), 'Sex' (Male), 'Price Category' (A), 'Restriction' (HIS - do not issue), 'Credit limit' (0 USD), 'web site', 'phone', 'fax', 'Other' (Category 1-6), 'Main/Billing Address' (Address 1: Pacific Road, Address 2, Country: Demo Land), and 'View on Map'.

6. Click **OK** to save the patient

**Always check if a patient is already on mSupply before adding a new profile!**

Having a single record for a person means that we can track their dispensing history accurately. Let's explore what kind of information mSupply stores in the **Patient Details** window.

### General

This tab contains general personal information about the patient such as **Name**, **Date of Birth** and **Address**. If the **Hold: do not issue** box is checked, no stock can be dispensed. The **Credit limit** is the maximum negative value a patient's account can have.

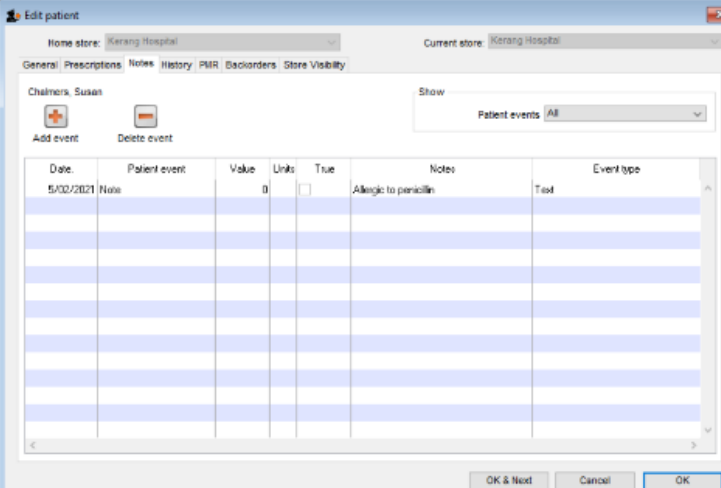
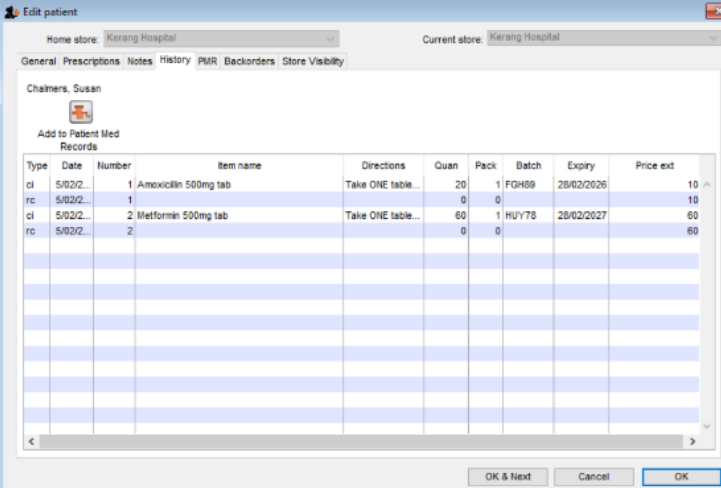
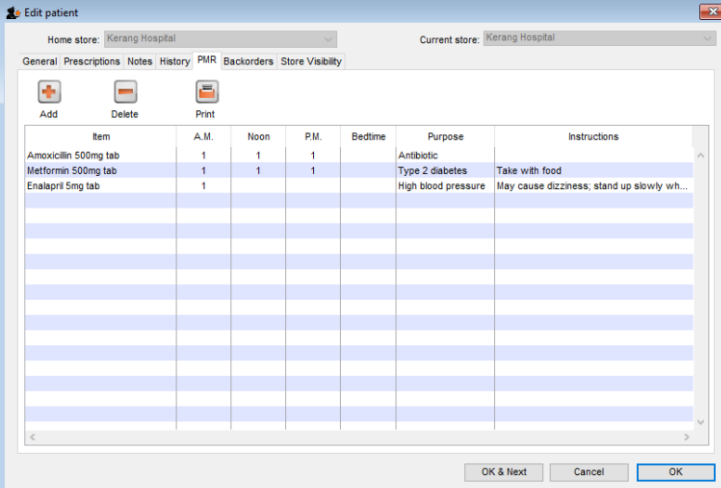
### Prescriptions

This tab shows each prescription dispensed for the patient.

Type **ci** are prescriptions and **rc** are payments for prescriptions.

Double click a line to open a prescription.

Type	Status	Entry dt	Confirm dt	Invoice ...	Ther ref	Comment	Batch	Total	Outstanding
ci	fn	5/02/21	5/02/2021	1			0	10	0
rc	fn	5/02/21	5/02/2021	1		Receipt for invoice(s) 1	0	10	0
ci	fn	5/02/21	5/02/2021	2			0	60	0
rc	fn	5/02/21	5/02/2021	2		Receipt for invoice(s) 2	0	60	0

<p><b>Notes</b></p> <p>Click Add event to add a note to the patient's profile.</p> <p><b>Notes</b> are displayed each time you dispense a prescription to the patient. These can be used to remind you of patient allergies to medicines or preferences for certain dosage forms.</p>	
<p><b>History</b></p> <p>This tab shows a list of all individual items previously dispensed to the patient in mSupply.</p> <p>Double click an item to open the prescription where it was dispensed.</p> <p>Highlight a line and click <b>Add to Patient Med Records</b> to add it to the <b>PMR</b>.</p>	
<p><b>PMR</b></p> <p>This is the <b>Patient Medication Record</b> which can be printed and given to the patient as a simple summary of all their medications, dosages and instructions for use. Items can be added from the <b>History</b> tab. You can click the <b>Add</b> button to record other medicines a patient is taking.</p>	

### Backorders

These allow you to record items you were unable to supply to a patient, and will supply to them at a later date.

The screenshot shows the 'Edit patient' window with the 'Backorders' tab selected. The window title is 'Edit patient'. At the top, there are dropdowns for 'Home store: Kerang Hospital' and 'Current store: Kerang Hospital'. Below these are tabs: 'General', 'Prescriptions', 'Notes', 'History', 'PMR', 'Backorders', and 'Store Visibility'. The 'Backorders' tab is active, showing a toolbar with 'New Backorder', 'Delete Backorder', 'Copy', and 'Print'. Below the toolbar is a table with the following columns: 'Code', 'Item', 'Order date', 'Quantity', 'Stock', and 'Comment'. The table is currently empty. At the bottom of the window are buttons for 'OK & Next', 'Cancel', and 'OK'.

### Store Visibility

Prescriptions can be dispensed to a patient in a particular store when the **Visibility** box for that store is checked.

Visibility preferences are set by Administrators.

The screenshot shows the 'Edit patient' window with the 'Store Visibility' tab selected. The window title is 'Edit patient'. At the top, there are dropdowns for 'Home store: Kerang Hospital' and 'Current store: Kerang Hospital'. Below these are tabs: 'General', 'Prescriptions', 'Notes', 'History', 'PMR', 'Backorders', and 'Store Visibility'. The 'Store Visibility' tab is active, showing a table with the following columns: 'Stores' and 'Visibility'. The table lists several stores with their corresponding visibility checkboxes:

Stores	Visibility
Hawthorn East Clinic	<input type="checkbox"/>
Kerang Hospital	<input checked="" type="checkbox"/>
Mont Albert CHC	<input type="checkbox"/>
National Medical Warehouse	<input type="checkbox"/>
Registration	<input type="checkbox"/>
Thornbury Warehouse	<input type="checkbox"/>

At the bottom of the window are buttons for 'OK & Next', 'Cancel', and 'OK'.



## Session 2.9 Dispensing Prescriptions

Prescriptions are instructions written by a prescriber authorising a patient to be provided a medicine or medical device. You can record the details of a dispensed prescription in mSupply.

1. Navigate to the **Patients** tab and click the **New Prescription** button



2. Enter the patient **Name**

You can:

--type the first few letters of patient's surname and press TAB

--type \*patient code and press TAB

If the patient cannot be found, click the **New Patient** button.

3. Enter the **Prescriber**

You can:

--type the first few letters of prescriber's surname and press TAB

--type prescriber code and press TAB

--type @ and press TAB to choose from a list of ALL prescribers  
If the prescriber cannot be found, type @ and press TAB to open the prescriber list, then click **New**

#### 4. Enter the **Prescription Date**

Prescription Entry

Patient details: Name: Chamera, Susan, Date of birth: 27/01/1965, Female, Address: 123 Main Road, Store: Kierang Hospital, Entered: 5/02/2021, Invoice: 9, Entered by: Mei

Prescriber: Martin, Mary, Code: MW, Confirm date: 00/00/00, Prescription date: 05/02/2021

Items to be dispensed:

Line	Location	Item Name	Quan	Pa	Batch	Exp date	Sell Price	Price extn

Subtotal: 0.00, 0% tax: 0.00, 0% discount: 0.00, Total: 0.00, Amount Outstanding: 0.00

Buttons: Finalise, Export batch: 0, Status: n/w, OK & Next, Delete, OK

#### 5. Click **New line** to start adding items to dispense, then search for an **item**

You can:

--type the first few letters of item name and press TAB

--type the item code and press TAB

--type @ and press TAB to choose from a list of ALL items

Add item...

Item: [Red box], Line: 0, Prescribed Quantity: 0, Quan: 0 of 0, Pack: 0, Bulk/Outer pack size: 0

Repeats: Total: 0, Repeat left: 0, Expiry date: 5/04/2021

Directions: Abbreviation, Expanded directions

Buttons: Cancel, OK, OK & Next

#### 6. If more than one item matches your search, a list of those items is shown.

Review the **Stock on Hand** column: you can't dispense an item if you don't have any stock!

Double click the item you want to dispense (or click once and select **Use**)

Item list...

Item name	Item code	Item unit	Stock on Hand
Amoxicillin 500mg tab	amo500t		400
Ceftriaxone 500mg inj	cef500i		0
Chloroquine phosphate 100mg (base) tab	chl100t		0
Chloroquine phosphate 50mg/5mL syrup	chl50s		0
Diazepam 5mg tab	dia5t		0
Ibuprofen 200mg tab	ibu200t		0
Isoniazid 300mg tab	iso300t		0
Mefloquine 250mg tab	me250t		0
Metformin 500mg tab	met500t		9940
Metronidazole 500mg/100mL inj	met500i		0
Paracetamol 500mg tab	par500t		0
Primquine diphosphate 7.5mg tab	pr75t		0
Rifampicin 150mg + isoniazid 150mg tab	ri15t1		0
Rifampicin 150mg + isoniazid 75mg tab	ri15t7		0
Rifampicin 150mg tab/cap	ri150t		400

Double-Click the item you want...

Buttons: Cancel, Use

#### 7. The **Line** number displayed shows you which batch you are dispensing with all available lines shown.

If more than one batch is available, mSupply will automatically select the next to expire.

If you want stock from a different line, double click the relevant line.

Add item...

Item: Amoxicillin 500mg tab, Item code: amo500t

Line: 1, Prescribed Quantity: 20, Quan: 20 of 260, Pack: 1, Bulk/Outer pack size: 0

Repeats: Total: 0, Repeat left: 0, Expiry date: 5/04/2021

Line	Issue	Available	Tot in store	Pack	Hold	Batch	Expdate	Supplier	Donor	Location	Cost Price	Sell Price
1	20	260	260	1		FGH89	28/02/2026	NMW			0.50	
2	0	200	200	1		FGH89	28/02/2026	NMW		BLUE	0.50	

Total quantity issued: 20, Total quantity available: 460

Directions: Abbreviation, Expanded directions

Buttons: Cancel, OK, OK & Next

8. Enter the **Quantity** to issue, paying close attention to the **Pack size**.

The **Total quantity issued** = Quantity X Pack size, and is shown.

Add item...

Item: Amoxicillin 500mg tab

Line: 1 Prescribed Quantity: 20

Quan: 20 of 260

Pack: 1 Bulk/Outer pack size: 0

Repeats: Total: 0 Repeat left: 0 Expiry date: 5/04/2021

Add Place holder

Line	Issue	Available	Tot in store	Pack	Hold	Batch	Expiry date	Supplier	Donor	Location	Cost Price	Sell Price
1	20	260	260	1		FGH89	28/02/2026	NMW		BLUE	0.50	
2	0	200	200	1		FGH89	28/02/2026	NMW		BLUE	0.50	

Total quantity issued: 20  
Total quantity available: 460

Directions:  
Abbreviation:  
Expanded directions:

Cancel OK OK & Next

9. Enter the **Directions** for use.

You can set up **Abbreviations** to make dispensing quicker, or directly type in the **Expanded Directions**.

If you want to dispense more items, click **OK & Next**.

When you are finished, click **OK** to return to the prescription entry window.

Add item...

Item: Amoxicillin 500mg tab

Line: 1 Prescribed Quantity: 20

Quan: 20 of 260

Pack: 1 Bulk/Outer pack size: 0

Repeats: Total: 0 Repeat left: 0 Expiry date: 5/04/2021

Add Place holder

Line	Issue	Available	Tot in store	Pack	Hold	Batch	Expiry date	Supplier	Donor	Location	Cost Price	Sell Price
1	20	260	260	1		FGH89	28/02/2026	NMW		BLUE	0.50	
2	0	200	200	1		FGH89	28/02/2026	NMW		BLUE	0.50	

Total quantity issued: 20  
Total quantity available: 460

Directions:  
Abbreviation: It TDS uf  
Expanded directions: Take ONE tablet THREE times a day until finished.

Cancel OK OK & Next

10. You can add items from the patient's dispensing history by clicking the **History** button.

Prescription Entry

Patient details

Name: Chalmers, Susan

New Patient Code: AS890

Prescriber: Martin, Mary

Code: MM

Confirm date: 00/00/00

Prescription date: 08/02/21

New line Delete line(s) Backorders **History** Repeats

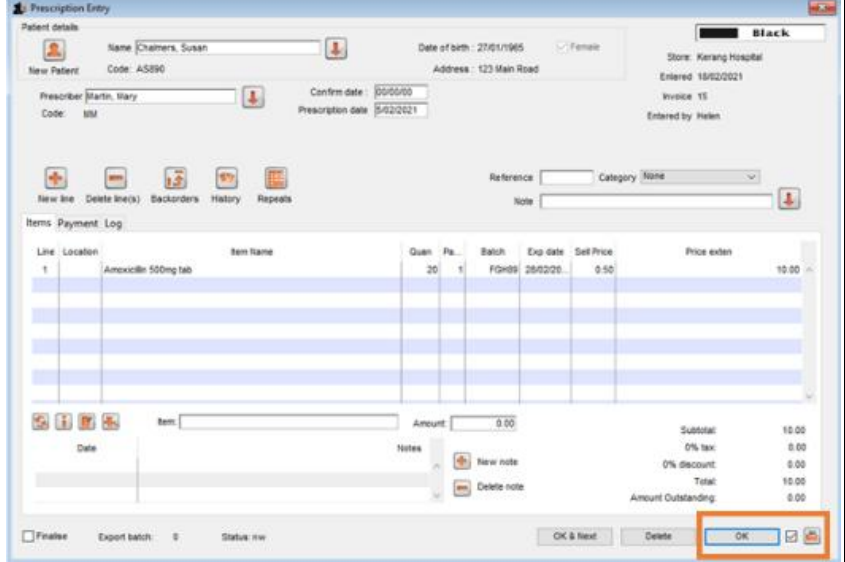
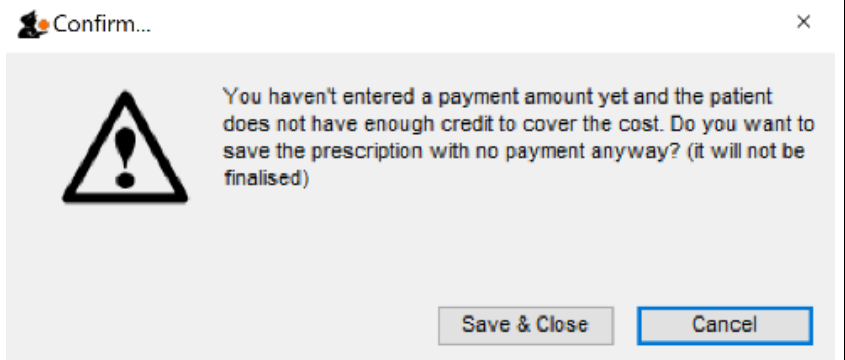

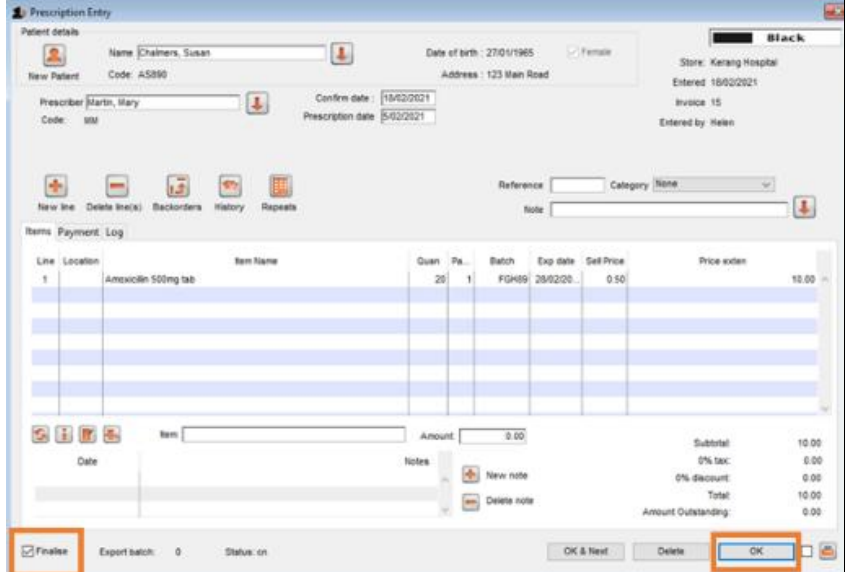
11. Click the line if you want to copy and click **Add to prescription**.

The item will now show on your prescription entry window.

History for Chalmers, Susan

Date	Number	Prescriber	Item	Quantity	Directions
5/02/2021	1	MM	Amoxicillin 500mg tab	20	Take ONE tablet THREE times a day until finished.
5/02/2021	3	MM	Amoxicillin 500mg tab	20	Take ONE capsule THREE times a day until finished.
5/02/2021	4	MM	Amoxicillin 500mg tab	20	Take ONE tablet THREE times a day until finished.
5/02/2021	2	JS	Metformin 500mg tab	60	Take ONE tablet TWICE daily with food.

Add to prescription OK

<p>12. Review the prescription entry window carefully.</p> <p>You can double click a line to edit it, or remove a line by highlighting it and clicking <b>Delete line(s)</b></p> <p>Check the <b>Print</b> box and click <b>OK</b> to print labels.</p>	
<p>13. If your store accepts payments from patients, a warning will pop up: click <b>Save &amp; Close</b></p> <p>Prepare the patient's medications and attach the dispensing labels.</p>	
<p>14. When you hand the dispensed items to the patient, reopen the prescription by finding it in the <b>Prescriptions list</b>.</p>	
<p>15. After opening the prescription, confirm all details are correct.</p> <p>Check the <b>Finalise</b> box, then click <b>OK</b>.</p> <p>Stock has now been removed from your inventory and patient's dispensing history has been updated.</p>	

If the patients pay at your facility, you will need to record the payment before the Prescription is finalized.

After opening the **Prescription list**, click the **Payment** tab.

Prescription Entry

Patient details

Name: Chalmers, Susan Date of birth: 27/01/1965 Female Store: Karang Hospital

New Patient Code: AS890 Address: 123 Main Road Entered: 15/02/2021

Prescriber: Martin, Mary Confirm date: 15/02/2021 Invoice: 15

Code: MM Prescription date: 5/02/2021 Entered by: Helen

Reference: Category: None

Note:

Items: **Payment** Log

Line	Location	Item Name	Quan	Pa	Batch	Exp date	Sell Price	Price exten
1		Amoxicillin 500mg tab	20	1	FQH89	28/02/20...	0.50	10.00

Subtotal: 10.00

0% tax: 0.00

0% discount: 0.00

Total: 10.00

Amount Outstanding: 0.00

Finalise Export batch: 0 Status: on OK & Next Delete OK

View the **Total to pay**

Prescription Entry

Patient details

Name: Chalmers, Susan Date of birth: 27/01/1965 Female Store: Karang Hospital

New Patient Code: AS890 Address: 123 Main Road Entered: 15/02/2021

Prescriber: Martin, Mary Confirm date: 15/02/2021 Invoice: 15

Code: MM Prescription date: 5/02/2021 Entered by: Helen

Items: Payment Log

Other details

This invoice will be automatically finalised if a payment is entered.

Cheque #

Note

To Pay

Invoice total

Total to pay

Payment details

Total payment

Amount given

Change to give back

Finalise Export batch: 0 Status: on Print receipt OK & Next Delete OK

Enter the actual **Amount** given by the patient

mSupply will automatically calculate the **Change to give back** to the patient

Prescription Entry

Patient details

Name: Chalmers, Susan Date of birth: 27/01/1965 Female Store: Karang Hospital

New Patient Code: AS890 Address: 123 Main Road Entered: 15/02/2021

Prescriber: Martin, Mary Confirm date: 15/02/2021 Invoice: 15

Code: MM Prescription date: 5/02/2021 Entered by: Helen

Items: Payment Log

Other details

This invoice will be automatically finalised if a payment is entered.

Cheque #

Note

To Pay

Invoice total

Total to pay

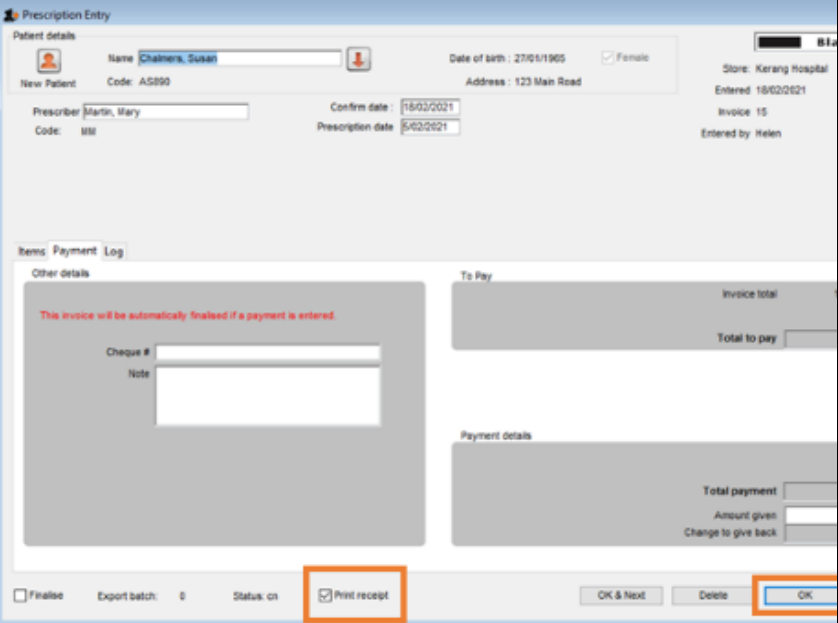
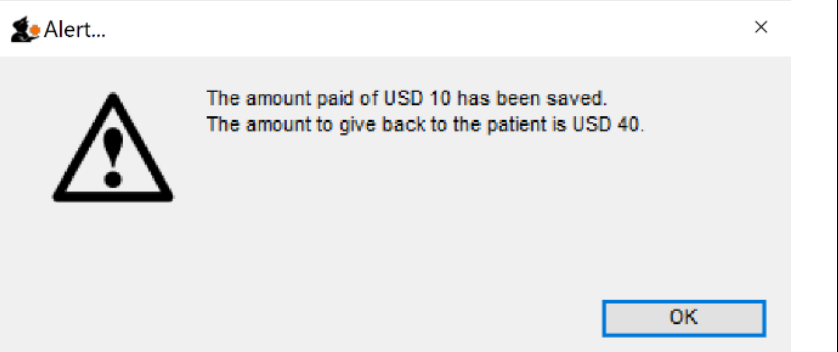
Payment details

Total payment

Amount given

Change to give back

Finalise Export batch: 0 Status: on Print receipt OK & Next Delete OK

<p>Click <b>OK</b></p> <p>If you want to print a receipt for the patient, check the <b>Print receipt</b> box before clicking <b>OK</b></p>	
<p>The patient's payment is acknowledged</p> <p>Click <b>OK</b></p> <p>Remember that the prescription is automatically finalised when you enter payment!</p>	

## **Session 2.10 Prescription Repeats**

If a prescriber authorizes repeats, it means the patient can be supplied the prescribed item multiple times.

1. Navigate to the **Patients** tab



2. Click the **New** prescription button





3. Enter the patient's  
**Name**

Prescription Entry

Patient details

Name: Shel, Tom

Date of birth: 06/06/90

Store: Karing Hospital

Entered: 5/02/2021

Prescription date: 5/02/2021

Amount: 0.00

Status: not

stocktake\_program\_column.png

OK & Next

4. Enter the **Prescriber**

Prescription Entry

Patient details

Name: Shel, Tom

Date of birth: 11/03/1970

Store: Karing Hospital

Entered: 5/02/2021

Prescription date: 5/02/2021

Amount: 0.00

Status: not

stocktake\_program\_column.png

OK & Next

5. Enter the  
**Prescription date** if  
it's not today's date

Prescription Entry

Patient details

Name: Shel, Tom

Date of birth: 11/03/1970

Store: Karing Hospital

Entered: 5/02/2021

Prescription date: 5/02/2021

Amount: 0.00

Status: not

stocktake\_program\_column.png

OK & Next

6. Click the **New line** button to start dispensing items

The screenshot shows the 'Prescription Entry' form. At the top, there are fields for Patient details (Name, Date of birth, Address), Prescriber details (Name, Code, Confirm date, Prescription date), and Store information (Store, Entered, Invoice, Entered by). Below these are buttons for 'New line', 'Delete line(s)', 'Backorders', 'History', and 'Repeats'. A blue callout box points to the 'New line' button with the text: 'Click the New line button to start dispensing items'. The main area is a table for dispensing items with columns: Item Name, Quan, PK, Batch, Exp Date, Sell Price, and Price enter. At the bottom, there are fields for 'Item', 'Amount', 'Subtotal', 'IP% tax', '0% discount', 'Total', and 'Amount Outstanding'. There are also buttons for 'Finalise', 'Export batch', 'Status: new', and 'stocktake\_program\_column.png'.

7. Search for the **Item** to dispense

The screenshot shows the 'Prescription Entry' form with the 'Add item...' dialog box open. The dialog box has a search bar with the text 'Search for the item to dispense'. It also has fields for 'Line', 'Prescribed Quantity', 'Repeats', 'Total', 'Repeat left', 'Expiry date', and 'Repeat Quantities'. There are buttons for 'Cancel', 'OK', and 'OK & Next'. The background shows the same 'Prescription Entry' form as in the previous screenshot.

8. mSupply will automatically choose to dispense the batch with the shortest expiry date

The screenshot shows the 'Prescription Entry' form with the 'Add item...' dialog box open. The dialog box has a table with columns: Line, Issues, Availa., TotIn st., Pack, Held, Batch, Expiry, Supplier, Donor, Location, CostPrice, and Sell. The table shows one item with a batch of 45365795 and an expiry date of 31/01/2024. A blue callout box points to the 'Expiry' column with the text: 'mSupply will automatically choose to dispense the batch with the shortest expiry date'. There are also buttons for 'Cancel', 'OK', and 'OK & Next'. The background shows the same 'Prescription Entry' form as in the previous screenshots.

9. Enter the **Quantity** to dispense, taking note of the **Pack** size

Enter the **Quantity** to dispense, taking note of the **Pack** size

10. Enter the **Total Repeats** authorized by the prescriber

Enter the **Total Repeats** authorised by the prescriber

11. Review/edit the **Expiry date** of the Repeats

Review/edit the **Expiry date** of the Repeats

12. Enter the **Directions** for use

Enter the directions for use

If a **Payment** is required, go to this tab

If a Payment is required, go to this tab

When you are sure everything is correct, check the **finalise** box

You're sure everything is correct, check the finalise box

If you are printing dispensing labels, check the **Print** box too

mSupply will also let you know when a patient has valid repeats to dispense.

1. Create a **Prescription** as usual



2. If a patient has valid repeats, the **Repeats** button will be red

- This shows a list of the patient's valid repeats

The screenshot shows the 'Prescription Entry' window. At the top, patient details are visible: Name (Joni, Ben), Date of birth (3/6/1989), Address (74 First Street), and Store (Karing Hospital). A 'Repeats' dialog box is open, displaying a table of valid repeats. A blue callout bubble points to the table with the text: 'This shows a list of the patient's valid repeats'.

Prescriber name	Item code	Item	Quantity	Total repeats	Repeat left	Expiry date
Smith, John	1234567	Aspirin 500mg tab	20	1	1	3/10/2021

Below the table, there are buttons for 'Process repeats' and 'OK'. At the bottom of the main window, there are fields for 'Amount' (0.00), 'Subtotal' (0.00), '9% tax' (0.00), '9% discount' (0.00), 'Total' (0.00), and 'Amount Outstanding' (0.00).

- Click the line(s) you wish to dispense

The screenshot shows the same 'Prescription Entry' window. The 'Repeats' dialog box is open, and the first line of the table is highlighted in blue. A blue callout bubble points to the highlighted line with the text: 'Click the line(s) you wish to dispense'.

Prescriber name	Item code	Item	Quantity	Total repeats	Repeat left	Expiry date
Smith, John	1234567	Aspirin 500mg tab	20	1	1	3/10/2021

The 'Process repeats' button is visible at the bottom of the dialog box.

- Then click **Process repeats**

The screenshot shows the same 'Prescription Entry' window. The 'Repeats' dialog box is open, and the 'Process repeats' button is highlighted with a blue callout bubble that says: 'Then click Process repeats'.

Prescriber name	Item code	Item	Quantity	Total repeats	Repeat left	Expiry date
Smith, John	1234567	Aspirin 500mg tab	20	1	1	3/10/2021

The 'Process repeats' button is located at the bottom of the dialog box.



Since this is a repeat prescription, you can't change the patient and prescriber

Prescription Entry

Patient details  
 Name: [First, Sen] Date of birth: 3/6/1969 Sex: Female Race: Black  
 New Patient Code: DP674 Address: 74 First Street Store: Karing Hospital  
 Entered: 5/22/2021 Invoice: 3 Entered by: Helen

Prescriber: [Smith, John] Confirm date: 5/22/2021 Prescription date: 5/22/2021

Repeat transaction - Patient and prescriber name not changeable

Since this is a repeat prescription, you can't change the patient and prescriber

Items (Payment Log)

Line	Location	Item Name	Quant	Pa...	Batch	Exp date	Sell Price	Price enter
1		Amoxicillin 500mg tab	20	1	45489874	29/02/20	0.00	0.00

Subtotal: 0.00  
 0% tax: 0.00  
 0% discount: 0.00  
 Total: 0.00  
 Amount Outstanding: 0.00

OK & Next Delete OK

Directions for use are saved from last time (double click if you need to edit them)

Prescription Entry

Patient details  
 Name: [First, Sen] Date of birth: 3/6/1969 Sex: Female Race: Black  
 New Patient Code: DP674 Address: 74 First Street Store: Karing Hospital  
 Entered: 5/22/2021 Invoice: 3 Entered by: Helen

Prescriber: [Smith, John] Confirm date: 5/22/2021 Prescription date: 5/22/2021

Repeat transaction - Patient and prescriber name not changeable

Directions for use are saved from last time (double click if you need to edit them)

Items (Payment Log)

Line	Location	Item Name	Quant	Pa...	Batch	Exp date	Sell Price	Price enter
1		Amoxicillin 500mg tab	20	1	45489874	29/02/20	0.00	0.00

Subtotal: 0.00  
 0% tax: 0.00  
 0% discount: 0.00  
 Total: 0.00  
 Amount Outstanding: 0.00

OK & Next Delete OK

If payment is required, go to the Payment tab

Prescription Entry

Patient details  
 Name: [First, Sen] Date of birth: 3/6/1969 Sex: Female Race: Black  
 New Patient Code: DP674 Address: 74 First Street Store: Karing Hospital  
 Entered: 5/22/2021 Invoice: 3 Entered by: Helen

Prescriber: [Smith, John] Confirm date: 5/22/2021 Prescription date: 5/22/2021

Payment tab selected

If a payment is required, go to this tab

To Pay  
 Invoice total: 0.00  
 Total to pay: 0

Payment details  
 Total payment: 0  
 Amount given: 0  
 Change to give back: 0

OK & Next Delete OK



When you are sure everything is correct, check the **Finalise** box

The screenshot shows the 'Prescription Entry' form. At the bottom left, there is a yellow button labeled 'Finalise'. A blue callout bubble points to this button with the text: 'If you're sure everything is correct, check the Finalise box'.

If you are printing dispensing labels, also check the **Print** box

The screenshot shows the 'Prescription Entry' form. At the bottom right, there is a yellow button labeled 'Print'. A blue callout bubble points to this button with the text: 'If you're printing dispensing labels, also check the Print box'.

Click **OK**

The screenshot shows the 'Prescription Entry' form. At the bottom right, there is a blue button labeled 'OK'. A blue callout bubble points to this button with the text: 'Click OK'.

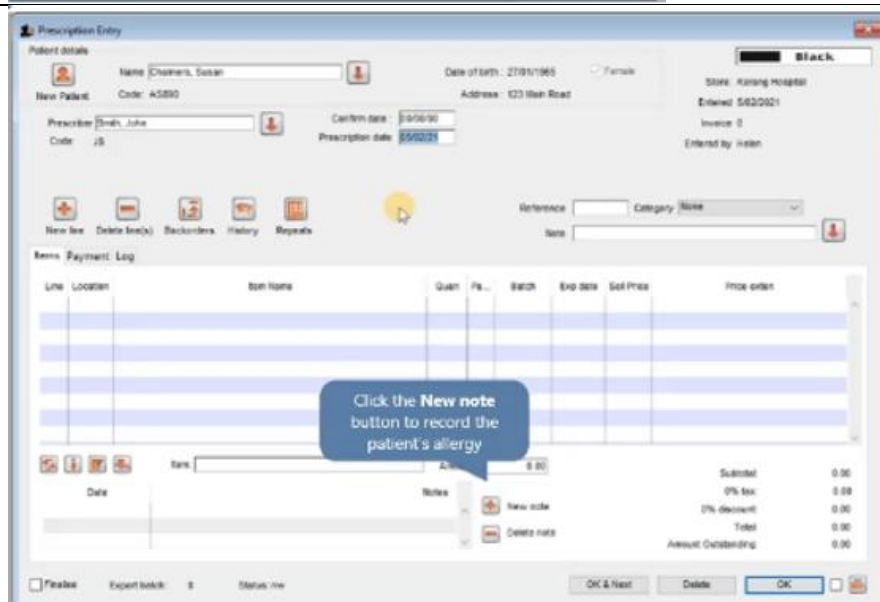
## Session 2.11 Prescription Warnings and Interactions

mSupply can be set up to warn you about patient's allergies and medication interactions.

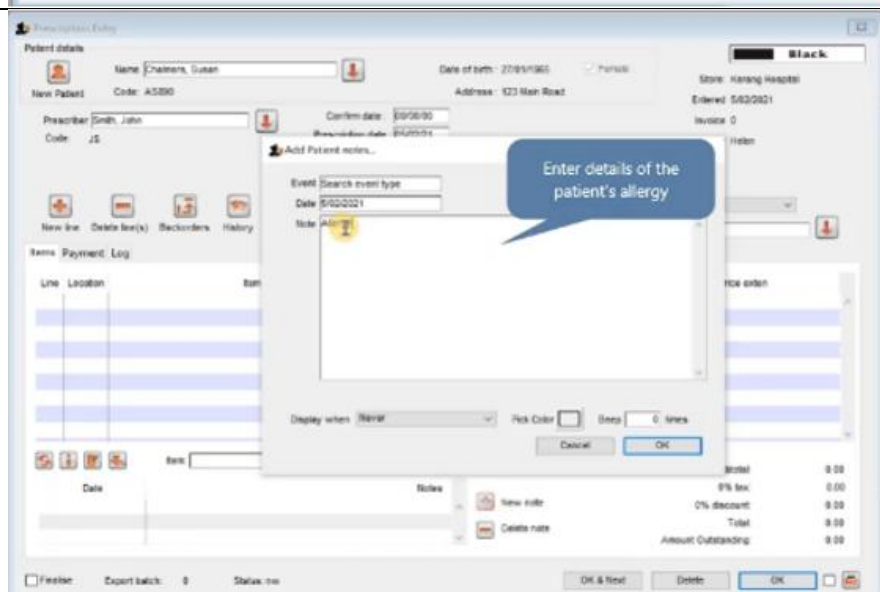
1. Create a prescription in the usual process



2. Click the **New note** button to record the patient's allergy



3. Enter details of the patient's allergy



4. Specify if you want this note to display whenever a new **Prescription** is created

Specify if you want this note to display whenever a new **Prescription** is created

5. If you select **Never**, it will still display at the bottom of every prescription

If you select **Never**, it will still display at the bottom of every prescription

6. Click **OK** to save the note

Click **OK** to save the note

The note is displayed here for all future prescriptions

[illegible]

Let's dispense ibuprofen tablets

The screenshot shows the 'Prescriptions' window with the 'Add item...' dialog box open. The dialog box contains the following sections:

- Patient details:**
  - Name: [Empty]
  - Line: 0, Prescribed Quantity: 0
  - Repeats: 0, Total: 0, Repeat left: 0, Expiry date: 5/24/2021
  - Quantity: 0 of 0, Bulk/Outer pack size: 0
- Directions:**
  - Abbreviation: [Empty]
  - Expanded directions: [Empty]
- Buttons:** Cancel, OK, OK & Next (highlighted)

The background window shows a list of items with columns for Name, Amount, and Date. The first item is 'Adalry to penicillin antibiotic (ampicillin)' with an amount of 0.00 and a date of 5/23/2021. The bottom of the window shows a 'Finalize' button and a 'Print' button.

A drug interaction alert has appeared

**Pharmacy Assistant**

**Add Item...**

Item: Enalapril 5mg tab    Item Code: 002008

Line: 1    Prescribed Quantity: 30    Sub/Outer pack size: 30

Line Item: 1    Prescribed Quantity: 30    Sub/Outer pack size: 30

CAUTION: A drug interaction alert has appeared

**Drug Interactions**

Items	Affect type	Type	Groups	Significance
Enalapril 5mg tab	affects	segments	ACE Inhibitor	major
Enalapril 5mg tab	affects	segments	ACE Inhibitor	major

**Directions**

Abbreviation:    Expanded directions:

**Notes**

S/C (0021) Allergy to penicillin antibiotics (anaphylaxis)

**Status:** new

**Buttons:** Cancel, OK, OK & Save, New code, Delete note, Print, Delete

Double click the interaction alert to learn more

Double click the interaction alert to learn more

Items	Affect type	Type	Groups	Significance
Enalapril 5mg tab	affects	augments	ACE Inhibitor	major
Enalapril 5mg tab	affects	augments	ACE Inhibitor	major

Looks like this patient's blood pressure medication might not go so well with the painkiller

Looks like this pressure medication might not go so well with

At this point, the dispenser should pause and reach out to the prescriber for clarifications

And continues after receiving a go ahead from the prescriber.

I will pause dispensing and call the prescriber to check...

Items	Affect type	Type	Groups	Significance
Enalapril 5mg tab	affects	augments	ACE Inhibitor	major
Enalapril 5mg tab	affects	augments	ACE Inhibitor	major

***Legacy Level 3***

## Session 3.1 Locations

Locations are places within stores where items are kept. You don't have to go hunting through your whole store for stock when mSupply can tell you exactly where it is.

Setting up loactions in mSupply helps you keep track of stock as it gets moved around.

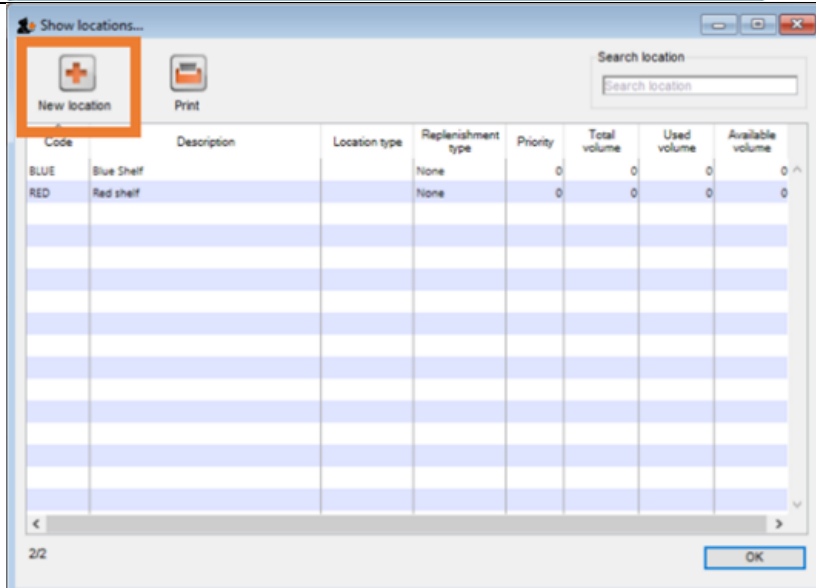
### To view and set up locations,

1. Navigate to the **Item** tab and click on **Locations**



Your **Locations Management Window** appears and a list of your Locations is displayed.

2. To add a location, click **New location**





### To add a new location,

Enter a **code** and a **description**

Click **OK & Next** to add another location

Click **OK** to return to the locations management window

The 'Add location' dialog box contains the following fields and controls:

- Code:** GRN
- Description:** Green shelf
- Location type:** None
- Replenishment location type:** None
- Parent:** None
- Summary:** ☐
- Comment:** [Text area]
- Total Volume:** 0 m3
- Volume used:** 0 m3
- Priority:** 0
- Hold:** ☒
- Buttons:** Delete, Cancel, OK, OK & Next

A **code** is how you refer to a location in mSupply and what you will select when entering an item's location. The **description** of the location will help you identify the location in real life.

**Location type** gives you the ability to categorise your locations.

**Replenishment location type** is where you tell mSupply if the location is a Pickface or Bulk location.

**Parent** refers to where a location belongs e.g. the Green shelf located in the Consumables room

**Hold:** when this box is checked, items in this location cannot be issued to customers or patients.

### You've added a new location!

The 'Show locations...' window displays a table with the following data:

Code	Description	Location type	Replenishment type	Priority	Total volume	Used volume	Available volume
BLUE	Blue Shelf		None	0	0	0	0
RED	Red shelf		None	0	0	0	0
GRN	Green shelf		None	0	0	0	0

### To edit or delete a location,

1. Open **Locations** again and double click on the location you wish to change

The 'Show locations...' window displays a table with the following data:

Code	Description	Location type	Replenishment type	Priority	Total volume	Used volume	Available volume
BLUE	Blue Shelf		None	0	0	0	0
GRN	Green shelf		None	0	0	0	0
RED	Red shelf		None	0	0	0	0

2. Edit any details needed, then click **OK** (or **OK & Next** if editing multiple lines)

To delete a location, click **Delete**

Remember to set the location of stock when receiving stock! It takes much longer to do it later.

The screenshot shows the 'Edit location' dialog box. The 'General' tab is selected. The 'Code' field contains 'JRN' and the 'Description' field contains 'Green shelf'. The 'Location type' is set to 'None', 'Replenishment location type' is 'None', and 'Parent' is 'None'. There are checkboxes for 'Summary' and 'Hold', both of which are unchecked. A text area for 'Comment' is present. Numerical fields for 'Total Volume' (0 m3), 'Volume used' (0 m3), and 'Priority' (0) are shown. At the bottom, there are four buttons: 'Delete', 'Cancel', 'OK', and 'OK & Next'. The 'Delete' and 'OK' buttons are highlighted with orange rectangular boxes.

## Session 3.2 Moving stock

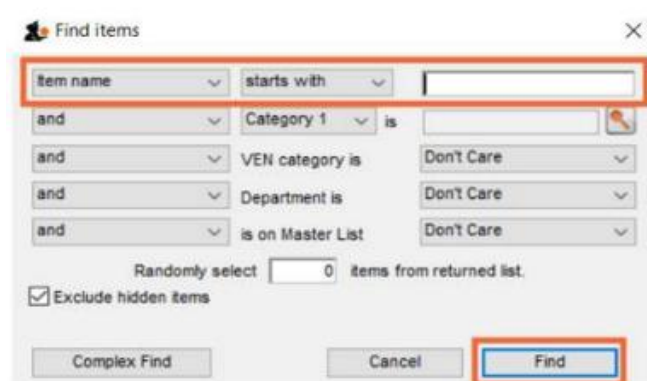
mSupply will record the movement of stock , so you can track the history of items and see who moved things around.

1. Navigate to the **Item** tab and click the **Items List** button



2. Search for the item you want to move, then click **Find**

Note that the default search is by **Item Name** but you can change it to **Item Code**



3. To select the item you want to move, Double click on the item

Item Code	Item name	Unit	Default pack	S
PM023	AMOXICILLIN + CLAVULANIC ACID (AUGMENTIN) 1.2 G POWDER FOR INJECTION	VIAL	1	1
PM021	AMOXICILLIN + CLAVULANIC ACID (AUGMENTIN) 125MG/5ML POWDER FOR SUSPENSION, 100ML	BTL	1	1
PM022	AMOXICILLIN + CLAVULANIC ACID (AUGMENTIN) 625 MG TABLET	TAB	20	1
PM017	AMOXICILLIN 125 MG/5 ML POWDER FOR SUSPENSION, 100 ML	BTL	1	1
PM018	AMOXICILLIN 250 MG CAPSULE	CAP	1000	1
PM019	AMOXICILLIN 250 MG/5 ML POWDER FOR SUSPENSION, 100 ML	BTL	1	1
PM020	AMOXICILLIN 500 MG CAPSULE	CAP	500	1

4. To open the stock tab,  
Click on **Stock** tab to see  
all the available stock of  
that item, separated by  
batch and location

Item details

Item name: AMOXICILLIN 500 MG CAPSULE  
Item code: PM020

Stock

Line	Available packs	Total packs	Hold	Pack size	Batch	Expiry	Supplier	Manufacturer	Donor	Location	Cost Price	Sell Price
1	50	50		1	PM020	31/03/2023	CPW0			BLUE	0.05	0.05
2	100	100		1	PM020	26/02/2025	CPW0			BLUE	0.06	0.06
3	500	500		1	PM020	30/06/2027	CPW0			BLUE	0.08	0.08

Stock  
Minimum stock: 0  
Stock on hand: 650  
Stock on order: 0

Months Cover  
Based on: 0 months usage  
For stock on hand: 0 (months cover)  
Including stock on order: 0 (months cover)

Non stock items  
Non stock item: ☐  
Default customer:

Exclude stock with expiry date less than: 3 months  
Generating an order for: 0 months stock  
will order a quantity of: 0

Buttons: Delete, OK & Previous, OK & Next, Cancel, OK

5. To move all stock,  
Double click the line to open a  
detailed window

Item details

Item name: AMOXICILLIN 500 MG CAPSULE  
Item code: PM020

Stock

Line	Available packs	Total packs	Hold	Pack size	Batch	Expiry	Supplier	Manufacturer	Donor	Location	Cost Price	Sell Price
1	4000	4000		1	PM020	31/01/2025				T.U.D	0.50	0.50

Stock  
Minimum stock: 0  
Stock on hand: 4,000  
Stock on order: 0

Months Cover  
Based on: 0 months usage  
For stock on hand: 0 (months cover)  
Including stock on order: 0 (months cover)

Non stock items  
Non stock item: ☐  
Default customer:

Exclude stock with expiry date less than: 3 months  
Generating an order for: 3 months stock  
will order a quantity of: 0

Buttons: Delete, OK & Previous, OK & Next, Cancel, OK

6. Enter the location for all  
the stock in the selected  
line.

Click **OK**

Item stock line details...

Item code: PM020  
Item name: AMOXICILLIN 500 MG CAPSULE

General | Ledger | Status | Reference documents | Log

Quantity according to stock  
Total Quantity: 4000  
Available: 4000

Cost price: 0.5  
Sell price: 0.5  
Expiry date: 31/01/2025  
Batch: PM020  
Supplier: CPW0  
Donor: None  
Note:

Location: RED  
Pack size: 1  
Volume per pack: 0 ml  
Quan per inner: 0  
Initial quantity: 0  
Inners per Outer: 0

Custom stock fields

Buttons: Cancel, OK

**All your stock has been moved!**

If you have multiple lines of stock to move, you will repeat the process for each line.

Item details window for AMOXICILLIN 500 MG CAPSULE. The 'Stock' tab is selected. The table shows 1 line of stock with 4900 available packs at location RED. The 'Split' button is highlighted with an orange box.

Line	Available packs	Total packs	Hold	Pack size	Batch	Expiry date	Supplier	Manufacturer	Donor	Location	Cost Price	Sell Price
1	4900	4900		1	PY70	31/01/2025				RED	0.50	0.50

To move some stock of the same batch to a different location, you need to **Split** the stock,

Select the line you want to split and click the **Split** button

Item details window for AMOXICILLIN 500 MG CAPSULE. The 'Split' button is highlighted with an orange box.

Enter the **Quantity to Split** and the **New Shelf Location** of the moved stock, then click **OK**

New repack dialog box. The 'Quantity to split' is 900 of 4900, and the 'New shelf location' is BLUE. The 'OK' button is highlighted with an orange box.

Review the locations...

You have now moved stock to different locations!

Item details window for AMOXICILLIN 500 MG CAPSULE. The 'Stock' tab is active. The table shows two lines of stock:

Line	Available	Total	Hold	Pack	Batch	Expiry	Supplier	Manufacturer	Donor	Location	Cost Price	Sell Price
1	300	300		1	PY76	31/01/2025				BLUE	0.58	0.50
2	4300	4300		1	PY76	31/01/2025				RED	0.58	0.50

The 'Consolidate' button is highlighted in the top toolbar.

To move stock of the same batch from different locations to the same location (**Consolidate**),

Select the two lines to consolidate (press **Control** on the keyboard and click the line)

Item details window for Metformin 500mg tab. The 'Stock' tab is active. The table shows five lines of stock:

Line	Available	Total	Hold	Pack	Batch	Expiry	Supplier	Manufacturer	Donor	Location	Cost Price	Sell Price
1	50	50		1	BS111	31/01/2022	ARC			SHELF	0.00	0.00
2	100	100		1	DEF456	31/07/2022				SHELF	12.00	14.00
3	50	50		1	SA111	31/01/2023	ARC			SHELF	0.00	0.00
4	1000	1000		1	SD333	28/02/2027	MON			CLIPBOARD	0.50	0.55
5	1000	1000		1	SD333	28/02/2027	MON			SHELF	0.50	0.55

A blue selection box highlights lines 4 and 5. A tooltip indicates: "Select the two lines to consolidate (press Control on the keyboard + click the lines)".

Click the **Consolidate** button

Item details window for Metformin 500mg tab. The 'Stock' tab is active. The table shows five lines of stock:

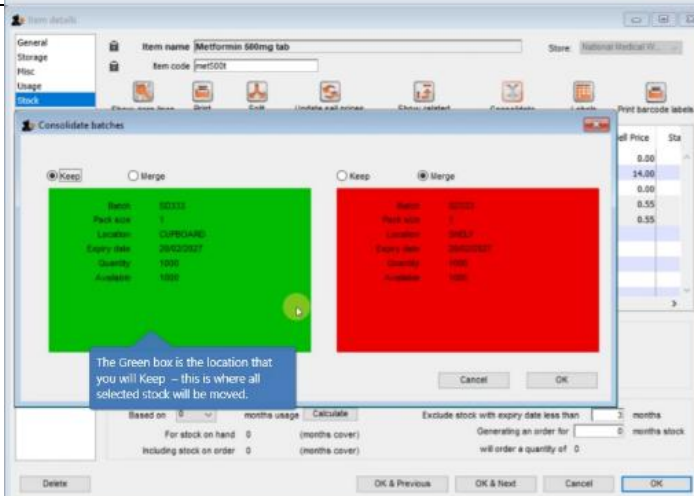
Line	Available	Total	Hold	Pack	Batch	Expiry	Supplier	Manufacturer	Donor	Location	Cost Price	Sell Price
1	50	50		1	BS111	31/01/2022	ARC			SHELF	0.00	0.00
2	100	100		1	DEF456	31/07/2022				SHELF	12.00	14.00
3	50	50		1	SA111	31/01/2023	ARC			SHELF	0.00	0.00
4	1000	1000		1	SD333	28/02/2027	MON			CLIPBOARD	0.50	0.55
5	1000	1000		1	SD333	28/02/2027	MON			SHELF	0.50	0.55

A blue selection box highlights lines 4 and 5. A tooltip indicates: "Click the Consolidate button".

When prompted, click **Yes** to confirm you want to proceed



The Green box is the location that you will keep – this is where all selected stock will be moved

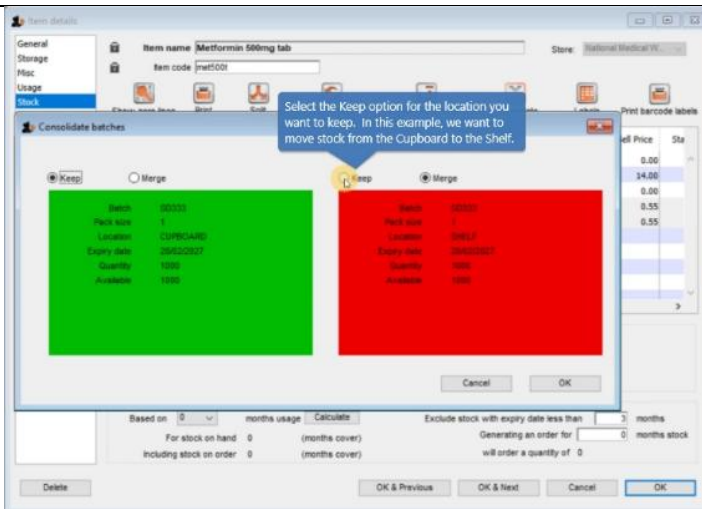


The Red box is the location that the stock will be merged from

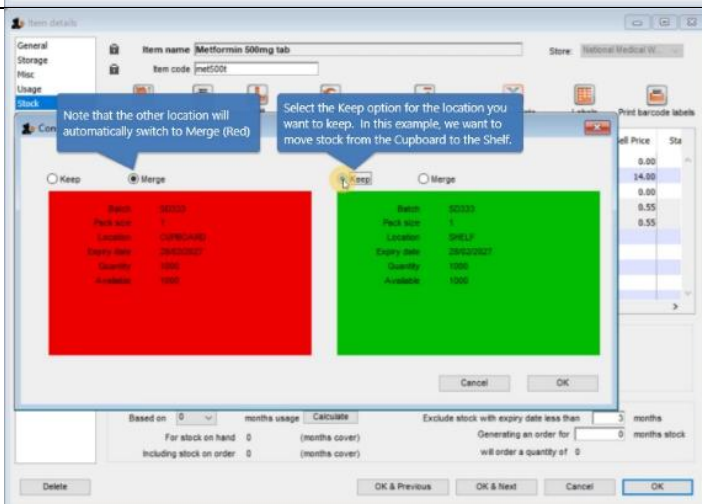




Select the Keep option for the location you want to keep. In this example, we want to move stock from the Cupboard to the Shelf



Note that the other location will automatically switch to Merge (Red)



Click **OK** to consolidate stock



You can see all 2000 packs are now stored on the Shelf. None of this batch is stored in the Cupboard.

Item details

Item name: Metformin 500mg tab Store: National Medical St.

Item code: met500

Buttons: Show zero lines, Print, Split, Update sell prices, Show related stock, Consolidate, Labels, Print barcode labels

Line	Available packs	Total packs	Held	Pack size	Batch	Expiry date	Supplier	Manufacturer	Donor	Location	Cost Price	Sell Price	Ste
1	50	50		1	BE111	31/01/2022	ARC			SHELF	9.00	9.00	
2	500	500		1	DEP496	31/07/2022	ARC			SHELF	12.00	14.00	
3	50	50		1	SA311	31/01/2022	ARC			SHELF	9.00	9.00	
4	2000	2000		1	W2112	24/02/2022	ARC			SHELF	9.50	9.50	

Stock

Minimum stock: 0 Total stock value: 2,200.00

Stock on hand: 2,200 Average unit cost: 1.00

Stock on order: 500 Total Volume: 9.00

Months Cover

Based on: 5 months usage Calculate

For stock on hand: 0 (months cover)

Including stock on order: 0 (months cover)

Non stock item: ☐

Default customer: [dropdown]

Exclude stock with expiry date less than: 3 months

Generating an order for: 0 months stock

will order a quantity of: 0

Buttons: Delete, OK & Previous, OK & Next, Cancel, OK

You can see all 2000 packs are now stored on the Shelf. None of this batch is stored in the Cupboard.

## Session 3.3 Repacking

Repacking is useful when you want to reduce pack sizes of tablets into smaller packs for distribution or patient dispensing.

There are two ways to repack items on mSupply:

- You can use the **Split function**
- You can use the **Repack function**

### Split function

You can use the Split function to repack stock by splitting the stock line into different pack sizes

Item details window for Amoxicillin 500mg tab. The 'Stock' tab is selected. The table shows 5 available packs and 5 packs on hand. The 'Split' button is highlighted in the top toolbar.

1. Select the stock line to repack and then click **Split**

Item details window for Amoxicillin 500mg tab. The 'Split' button is highlighted in the top toolbar.

2. Enter the **Quantity to Split** and the **New Pack Size** of the repacked stock

Click **OK**

New repack dialog box. The 'Quantity to split' is 1 of 5. The 'New shelf location' is BLUE. The 'New pack size' is 50. The 'OK' button is highlighted.

3. You can now see there is a new stock line containing repack sizes.

mSupply automatically calculates the quantity of the new packs

Line	Available	Total	Hold	Pack	Batch	Expiry date	Supplier	Manufacturer	Donor	Location	Cost Price	Sell Price
1	4	4		1000	FGH89	28/02/2026				BLUE	500.00	500.00
2	20	20		50	FGH89	28/02/2026				BLUE	25.00	25.00

The **Repack** function can split batches into multiple repacks.

1. Navigate to the **Item** tab and click the **New Repack** button

2. Search for the item to be repacked

You can  
--type the first few letters and press tab  
--type the item code and press tab  
--type @ and press tab to choose from a list of ALL items

3. Double click the batch you want to repack

**Repack item...**

1. Choose item to be repacked...

2. Double-click a line to choose a batch

Line	Available	Total	Pack	Hold	Batch	Expiry date	Supplier	Location	Cost price	Sell price
1	5000	5000	1		JKW78	31/05/2026		BLUE	0.70	0.70
2	1000	1000	1		K0090	31/05/2027		BLUE	0.70	0.70

3. Enter Quantity to be repacked

Quan  of 5000 Pack size 1 Total quantity used 0

4. Enter details of new line(s) to be created

Quan	Pack	Total	Sell	Batch	Location

Total Sell price: 0 Total quantity created: 0

Category: None Comment: Status: n/w Change status to: Suggested (sg)

4. Enter the quantity of stock you want to repack, then click **New Line**

**Repack item...**

1. Choose item to be repacked...

2. Double-click a line to choose a batch

Line	Available	Total	Pack	Hold	Batch	Expiry date	Supplier	Location	Cost price	Sell price
1	5000	5000	1		JKW78	31/05/2026		BLUE	0.70	0.70
2	1000	1000	1		K0090	31/05/2027		BLUE	0.70	0.70

3. Enter Quantity to be repacked

Quan  of 5000 Pack size 1 Total quantity used: 1000

4. Enter details of new line(s) to be created

Quan	Pack	Total	Sell	Batch	Location

Total Sell price: 0 Total quantity created: 0

Category: None Comment: Status: n/w Change status to: Suggested (sg)

5. Enter the **New pack size** and **Quantity** of repacks you want, then click **OK**

**New repack**

4. Enter details of new lines(s) to be created

New pack size   
 New quantity   
 Total 500

Sell price   
 % markup   
 Batch   
 New location

- Click the **New line** button to add another repack, enter the details of the repack and click **OK**

**New repack**

4. Enter details of new lines(s) to be created

New pack size   
 New quantity   
 Total 500

Sell price   
 % markup 0  
 Batch   
 New location

- Review your repacks...

Once you are happy with your repacks, check the **Print** box to print the picking slip, then click **OK**

**You have created multiple repacks from a single batch line!**

**Repack item...**

1. Choose item to be repacked...  
 Metformin 500mg tab

2. Double-click a line to choose a batch

Line	Available	Total	Pack	Hold	Batch	Expiry date	Supplier	Location	Cost price	Sell price
1	5000	5000	1		JKW78	31/05/2028		BLUE	\$ 78	6.78
2	1000	1000	1		KD90	31/05/2027		BLUE	\$ 78	6.78

3. Enter Quantity to be repacked  
 Quan  of 5000 Pack size 1 Total quantity used 1000

4. Enter details of new line(s) to be created

Quan	Pack	Total	Sell	Batch	Location
10	50	500	35	JKW78	BLUE
25	20	500	14	JKW78	BLUE

Total Sell price 700 Total quantity created 1000

Invoice : 8  
 Entry date : 9/03/2021  
 Entered by : Ricardo  
 Store: National Medical War

Category: None  
 Comment:  
 Status: new  
 Change status to: Suggested (sg)

To print labels for repacks,

- Navigate to the **Special** tab and click the **Misc labels** button

**mSupply navigator**

Customer Suppliers Item Reports **Special** Admin

Currencies Reminders Contacts Abbreviations Warnings

Prescribers Merge prescribers Diagnoses

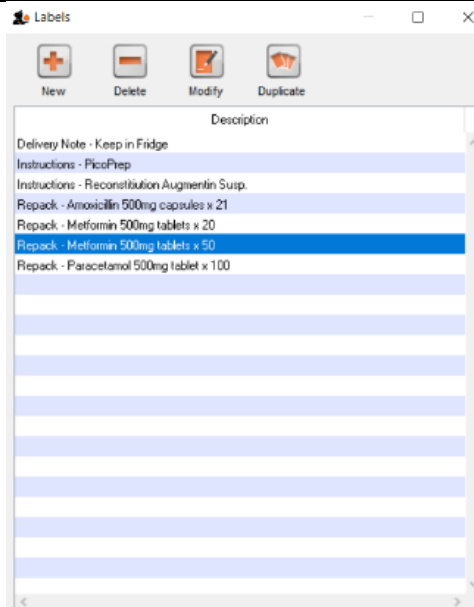
**Misc labels** Cash Register Stores Transaction categories

Data File: Demo Land Add  
 National Medical Warehouse  
 Ricardo

**mSupply**

DEMO LAND  
 MINISTRY OF HEALTH

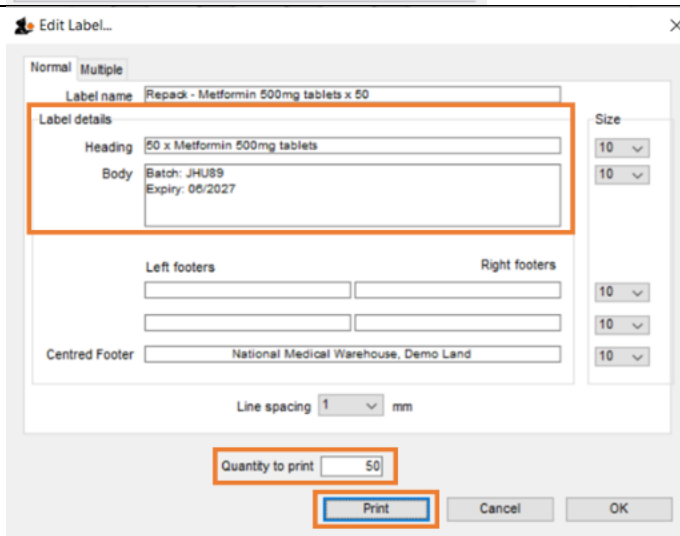
2. Double click the label you want to use (you will learn how to create one later)



3. Enter the batch and expiry details of the repack and any other details required into the Label details **Body** text.

Enter the **Quantity** of labels you want to print.  
Click **Print**.

Click **OK** to save the details of your input. Otherwise click **Cancel**

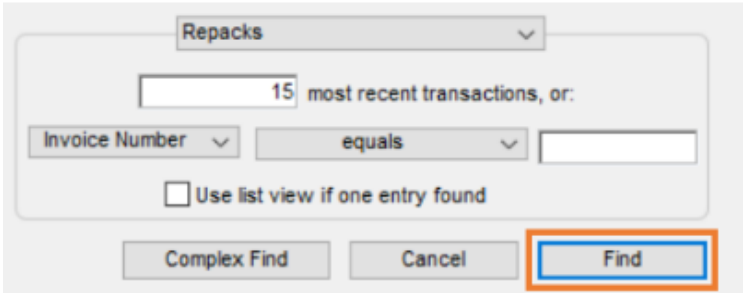
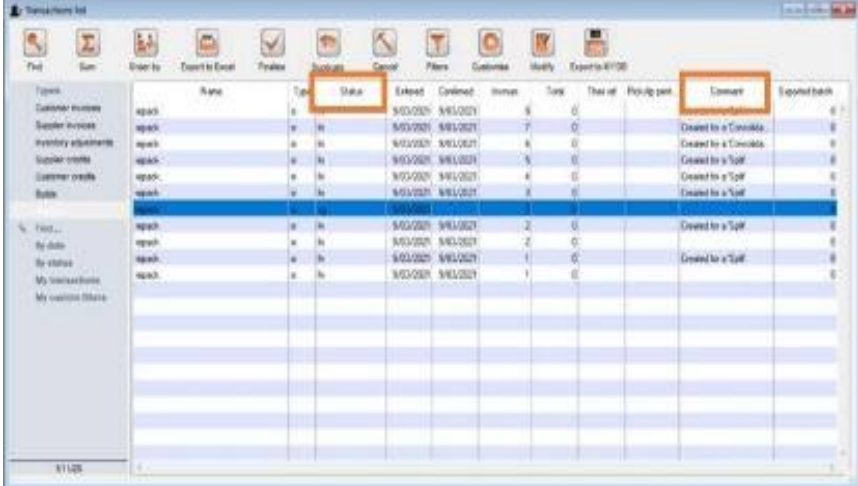
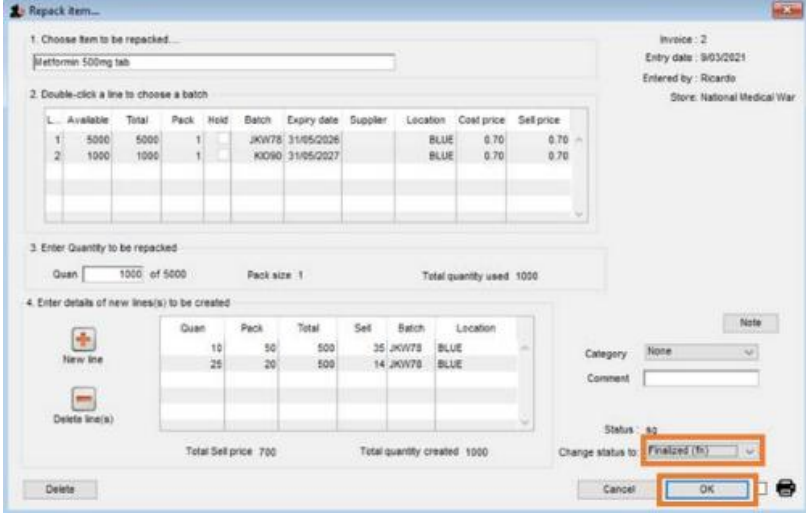
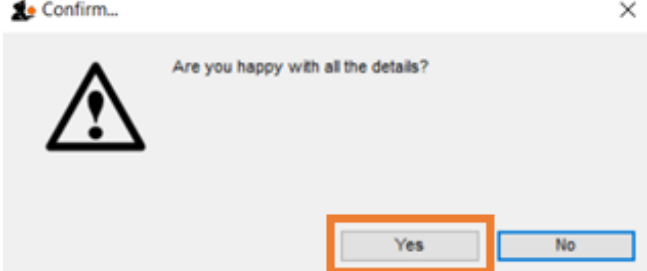


**Once you have labelled and dispensed your repacks and they have been checked off, you can finalise them in mSupply**

1. Navigate to the **Item** tab and click the **Repacks** list button





<p>2. To find your repack, when prompted, click <b>Find</b></p>	<p>Find transaction</p> 
<p>3. Double click to select the repack you want to finalise</p> <p><i>Hint: the status should be <b>sg</b> and the comment column should be blank</i></p>	
<p>4. Change the status of the repack from Suggested (<b>sg</b>) to Finalised (<b>fn</b>) then click <b>OK</b></p>	
<p>5. Click <b>Yes</b> when prompted.</p> <p><b>You have created repacks for your store!</b></p>	

## Session 3.4 Stocktakes (General)

When you first open mSupply, your stock will be empty. You will need to perform a stocktake which is a physical count of all the stock in your store.

Full stocktakes are performed regularly according to local policy. You might need to perform adhoc or partial stocktakes for a single or few items if you need to adjust stock levels for any reason.

### To perform a First Stocktake,

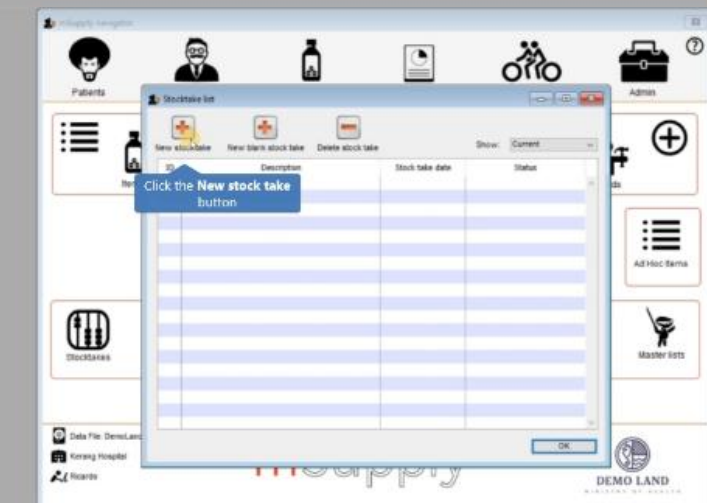
1. Click the **Items** tab



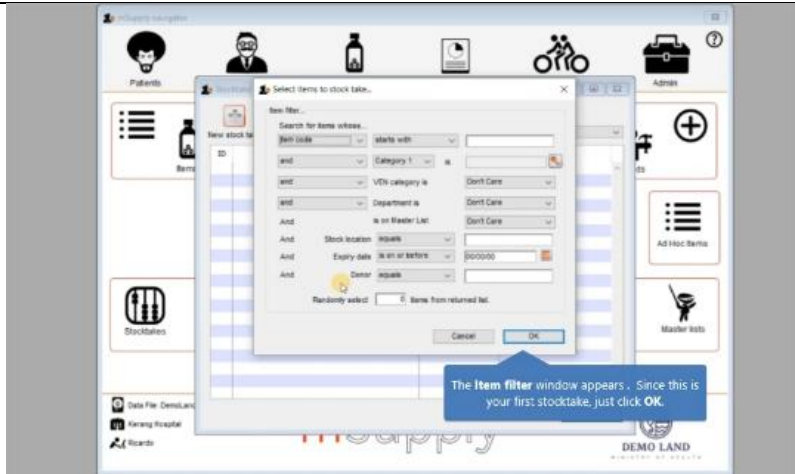
2. Click the **Stocktakes** button



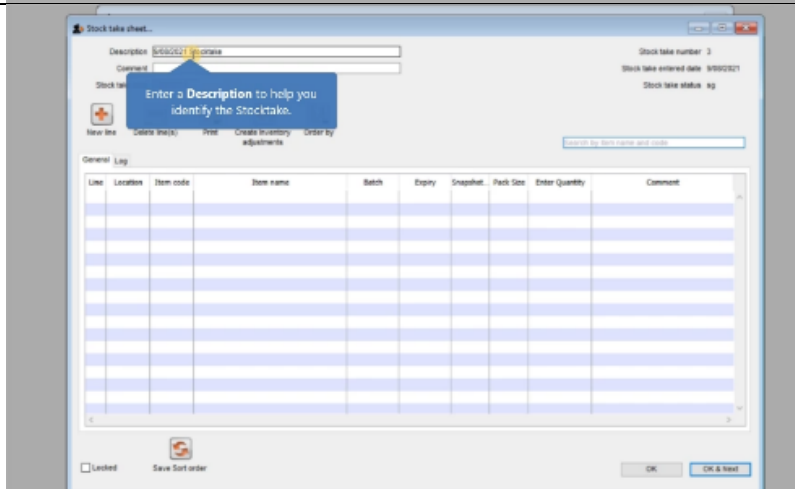
3. Click the **New stocktake** button



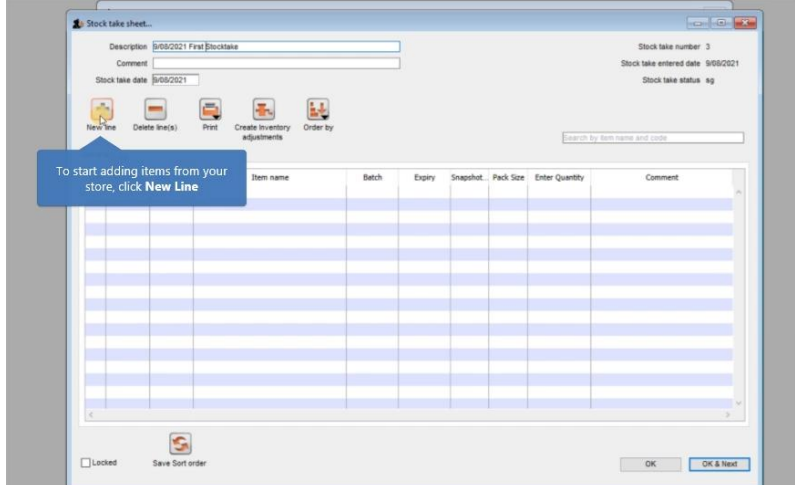
4. The **Item filter** window appears. Since this is a first stocktake, click **OK**.



5. Enter a **Description** to help you identify the Stocktake

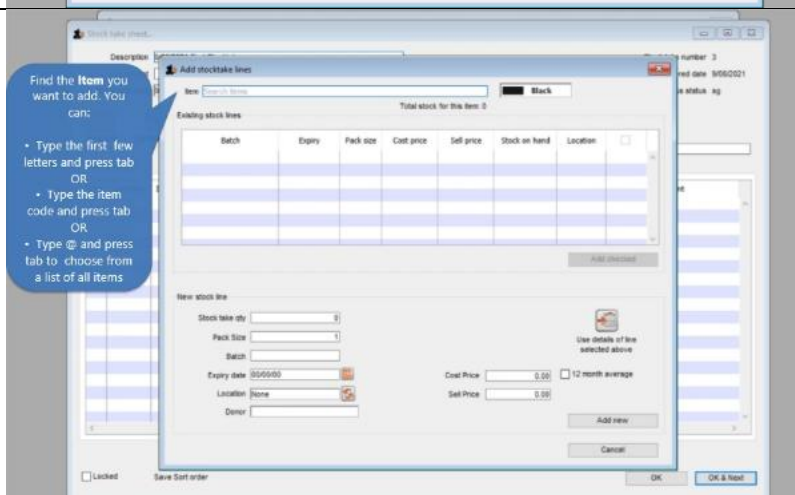


6. To start adding new items from your store, click **New line**



7. Find the Item you want to add.  
You can:

---type the first few letters and press tab  
OR  
---type the item code and press tab  
OR  
---type @ and press tab to choose from a list of all items



8. Enter the **Stocktake Quantity, Pack Size, Batch, Expiry Date, Location, Donor, Cost Price, Sell Price** etc

Enter the **Stocktake Quantity, Pack Size, Batch, Expiry Date, Location (if applicable), Donor (if applicable), Cost Price (if known) and Sell Price (if known)**.

9. To enter expiry date, you may type it in manually or click the Calendar icon and select the relevant months and year

To enter Expiry date, you may type it in manually or click the Calendar icon and select the relevant Month and Year

10. When you have added all the necessary details, click **Add New**

When you have added all the necessary details, click **Add new**

11. Your first item has been added to your stocktake

The screenshot shows the 'Stock take sheet...' window. At the top, there are fields for 'Description' (9/05/2021 First Stocktake), 'Comment', and 'Stock take date' (9/05/2021). On the right, it displays 'Stock take number: 3', 'Stock take entered date: 9/05/2021', and 'Stock take status: ng'. Below these are icons for 'New line', 'Delete line(s)', 'Print', 'Create inventory adjustments', and 'Order by'. A search bar is labeled 'Search by item name and code'. The main area is a table with columns: Line, Location, Item code, Item name, Batch, Expiry, Snapshot, Pack Size, Enter Quantity, and Comment. The first row contains: 1, 360, amp500mg, Ampicillin 500mg injection, AD213, 31/03/2023, 0, 10, 20. A blue callout box with a yellow arrow points to the first row, containing the text: 'Your first item has been added to the stocktake!'. At the bottom, there are checkboxes for 'Locked' and 'Save Sort order', and buttons for 'OK' and 'OK & Next'.

Line	Location	Item code	Item name	Batch	Expiry	Snapshot	Pack Size	Enter Quantity	Comment
1	360	amp500mg	Ampicillin 500mg injection	AD213	31/03/2023	0	10	20	

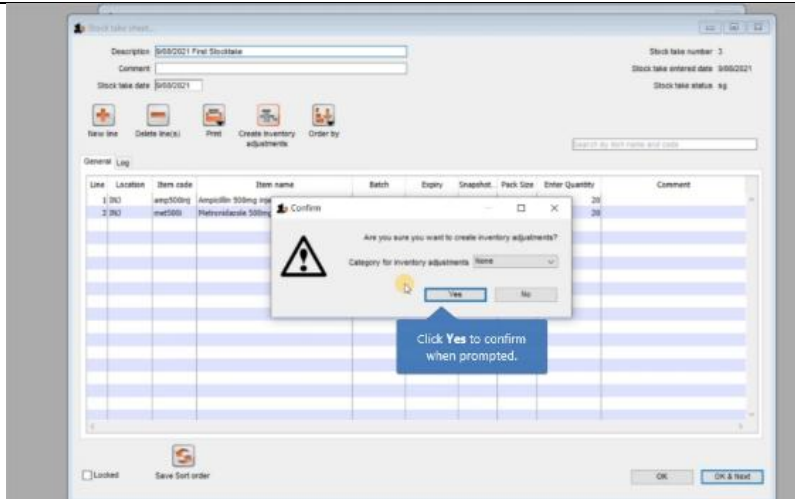
12. Click **New line** to keep adding items from your store (follow process above)

This screenshot is identical to the previous one, but with a blue callout box pointing to the 'New line' button. The callout text reads: 'Click New line to keep adding items from your store.'.

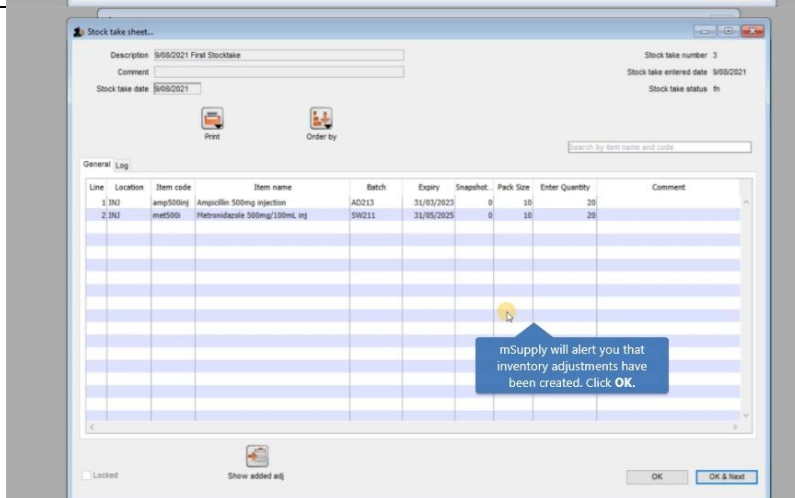
13. Once you have finished adding all items to your store, click **Create Inventory Adjustments** to complete the stocktake

This screenshot is identical to the previous ones, but with a blue callout box pointing to the 'Create inventory adjustments' button. The callout text reads: 'Once you have finished adding all items to your store, click Create Inventory adjustments to complete the stocktake.'.

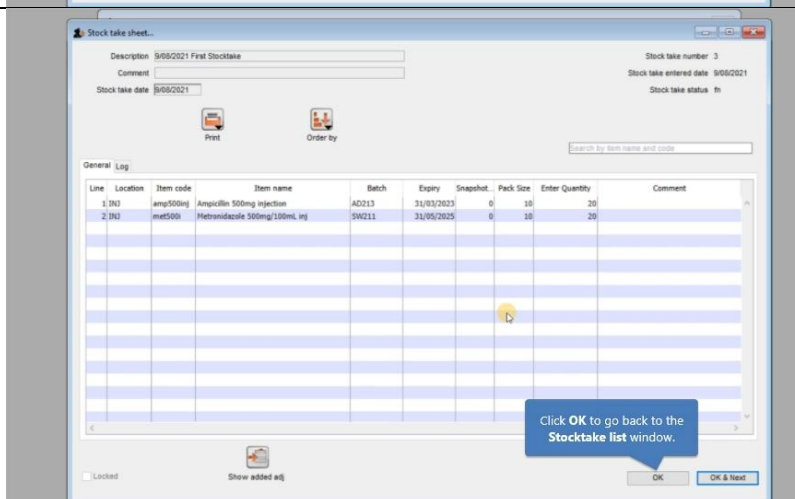
14. Click **Yes** to confirm, when prompted



15. mSupply will alert you that inventory adjustments have been created. Click **OK**



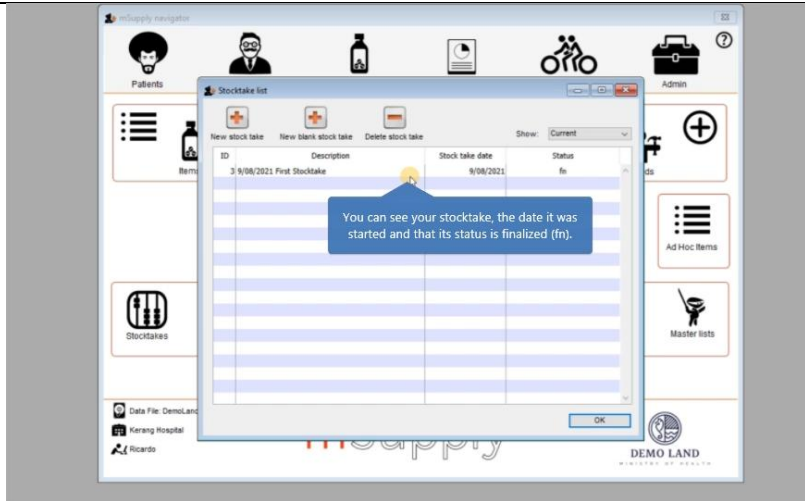
16. Click **OK** to go back to the **Stocktake list** window





**You can see your stocktake!**,  
the date it was started and its  
status is finalized (fn)

You only need to manually  
add items like this when you  
first set up mSupply!

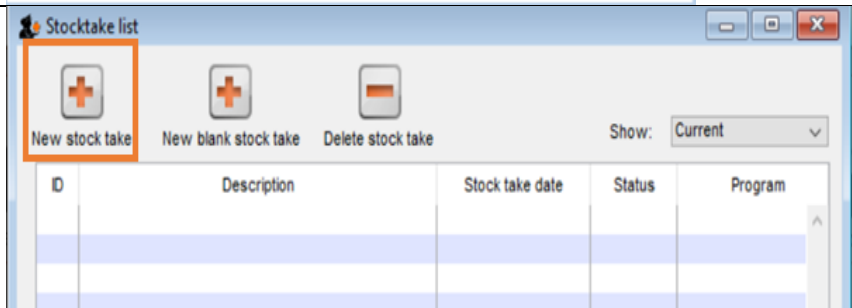


**To perform a Regular (Full)  
stocktake,**

1. Navigate to the **Item** tab  
and click **Stocktakes**

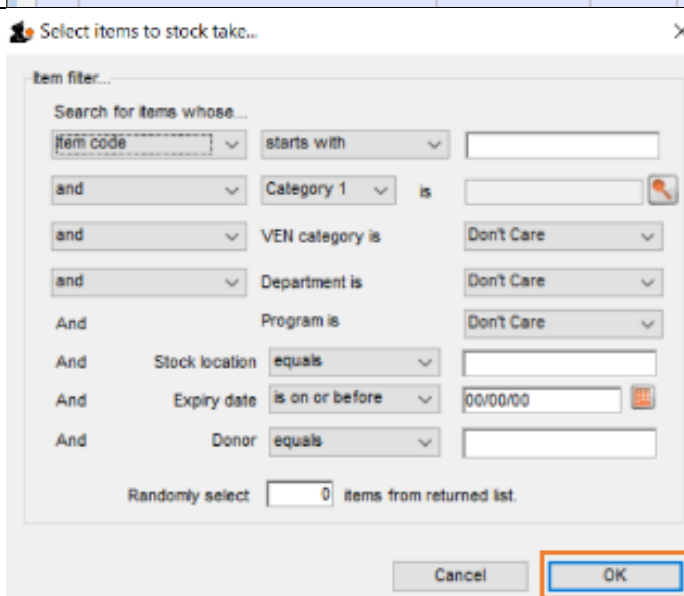


2. Click **New stock take**



3. Select items to stock take.

Click **OK**





4. Add a **Description** for your stocktake for easy identification

5. Double click on each line to a detailed window and edit the **Stocktake Quantity**. You can also correct other details such as batch or expiry date.

Click **OK & Next** to move to the next item or click **OK** to return to the main stocktake screen.

6. To add a new item that is not on your stocktake, click **New line** and search for the item and go ahead to add the relevant details.

Click **Add New**

7. Review your stocktake carefully.

To finish the stocktake, click **Create Inventory Adjustments**.

8. Click **Yes** when prompted

This will finalise your stocktake and update your stock in mSupply

Review your stock by going to the **Items** tab and clicking **Stock**.

**You have completed a Full Stocktake of your store inventory!**

To perform a **Partial stocktake**, you can:

1. Add a New Stocktake and add filters to limit the items added
  - **Item filter:** you can select from the dropdown menu which items you want to add.
  - **Additional filters or categories:** you can add additional or alternative requirements to your search by selecting AND or OR in the dropdown.
  - **Stock location:** you can filter by location if you only want to stocktake a particular location.
  - **Expiry date:** you can enter an expiry filter if you want to complete a stocktake for items expiring by a particular date.
  - **Randomly select:** you can enter a number of items you want to randomly stocktake.
2. Add a Blank stocktake and manually add the items you need

**Let us look at the filters that can be added to a New Stocktake ...**

**Item filter:** you can select from the dropdown menu which items you want to add.

Select items to stock take...

Item filter...

Search for items whose...

Item name starts with

and Category 1 is

and VEN category is Don't Care

and Department is Don't Care

And Program is Don't Care

And Stock location equals

And Expiry date is on or before 00/00/00

And Donor equals

Randomly select 0 items from returned list.

Cancel OK

**Additional filters or categories:** you can add additional or alternative requirements to your search by selecting AND or OR in the dropdown.

Select items to stock take...

Item filter...

Search for items whose...

Item name starts with

and Category 1 is

and VEN category is Don't Care

and Department is Don't Care

And Program is Don't Care

And Stock location equals

And Expiry date is on or before 00/00/00

And Donor equals

Randomly select 0 items from returned list.

Cancel OK

**Stock location:** you can filter by location if you only want to stocktake a particular location.

Select items to stock take...

Item filter...

Search for items whose...

Item name starts with

and Category 1 is

and VEN category is Don't Care

and Department is Don't Care

And Program is Don't Care

And Stock location equals

And Expiry date is on or before 00/00/00

And Donor equals

Randomly select 0 items from returned list.

Cancel OK

**Expiry date:** you can enter an expiry filter if you want to complete a stocktake for items expiring by a particular date.

Select items to stock take...

Item filter...

Search for items whose...

Item name starts with

and Category 1 is

and VEN category is Don't Care

and Department is Don't Care

And Program is Don't Care

And Stock location equals

And Expiry date is on or before 00/00/00

And Donor equals

Randomly select 0 items from returned list.

Cancel OK

**Randomly select:** you can enter a number of items you want to randomly stocktake.

Select items to stock take...

Item filter...

Search for items whose...

Item name starts with

and Category 1 is

Additional filters or categories category is Don't Care

and Department is Don't Care

And Program is Don't Care

And Stock location equals

And Expiry date is on or before 00/00/00

And Donor equals

Randomly select 0 items from returned list.

Cancel OK

**To add a Blank Stocktake and manually add items,**

1. Navigate to the **Items** tab and click **Stocktakes**



2. Click **New blank stock**  
**take**

The screenshot shows a software window titled "Stocktake list". At the top, there are three buttons: "New stock take" (with a plus icon), "New blank stock take" (with a plus icon and highlighted by a red rectangle), and "Delete stock take" (with a minus icon). To the right of these buttons is a "Show:" dropdown menu currently set to "Current". Below the buttons is a table with five columns: "ID", "Description", "Stock take date", "Status", and "Program". The table has multiple rows with alternating light blue and white background colors. A vertical scrollbar is visible on the right side of the table. At the bottom right corner, there is an "OK" button.

3. Enter a **Description** for your Stocktake and maybe a reason, in the comment box

Click **New Line**

Click **New Line**

The screenshot displays the 'Stock Entry' window in Tally ERP 9. At the top, there are tabs for 'New', 'Edit', and 'Print'. Below these, the 'Description' field contains 'Caffeine Powder Stockdate'. The 'Comment' field is empty. The 'Stock Date' is set to '16/05/2021'. On the right side, the 'Stock take number' is '10', the 'Stock take entered date' is '16/05/2021', and the 'Stock take status' is 'Ag'. Below the main form area, there are several icons for actions: 'New Item', 'Delete Item(s)', 'Print', 'Create Inventory', and 'Order by'. A search bar labeled 'Search by item name and code' is also present. The 'General' tab is selected, showing a table with columns: 'Lot', 'Location', 'Item Code', 'Item Name', 'Batch', 'Expiry', 'Weight', 'Pack Size', 'Enter Quantity', and 'Comment'. The table is currently empty. At the bottom left, there is a 'Locked' checkbox and a 'Save Serials' button. At the bottom right, there are 'OK' and 'OK & Post' buttons.

4. Find the **item** you want to add

To an existing stockline, check the tickbox and click **Add checked**

Click **OK** when prompted

To an existing stockline, check the tickbox and click **Add checked**

Click **OK** when prompted

Click **OK** when prompted

**Add stocktake lines**

Item:  Black

Total stock for this item: 4000

Existing stock lines

Batch	Expiry	Pack size	Cost price	Sell price	Stock on hand	<input type="checkbox"/>
YTU23	31/05/2024	1	1	1	4000	<input checked="" type="checkbox"/>

5. For new stocklines, enter the **Stocktake Quantity, Pack Size, Batch, Expiry Date, Location, Donor, Cost Price and Sell Price.**

Click **Add new**

6. Review your stocktake carefully.

To finish the stocktake, click **Create Inventory Adjustments** to update stock levels.

Click **Yes** when prompted

Click **OK** to close the Stocktake window.

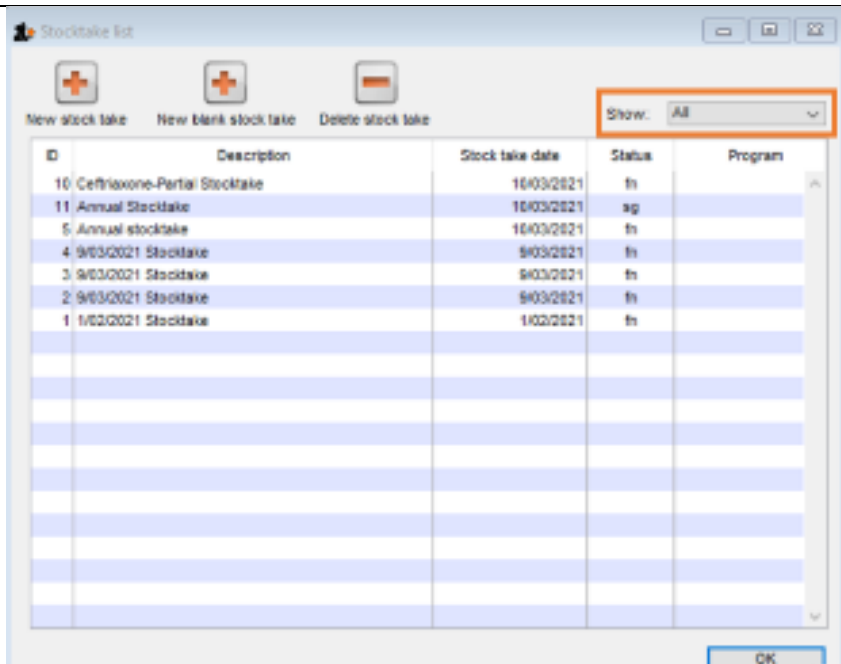
Before starting a new stocktake, you can review previously completed stocktake (status = fn) and stocktakes currently in progress (status = sg). **Do not leave stocktakes with a sg status unless they are truly in progress.** Unfinished stocktakes should be deleted.

### To review all stocktakes,

Navigate to the **Item** tab and click **Stocktakes**

In the **Show** dropdown list, select **All**

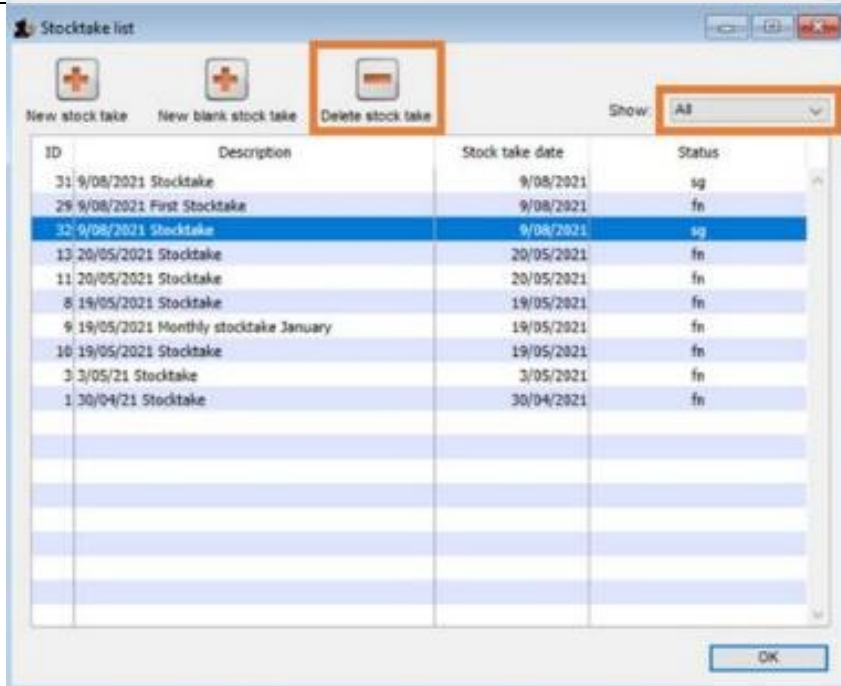
Double click on the stocktake to open it



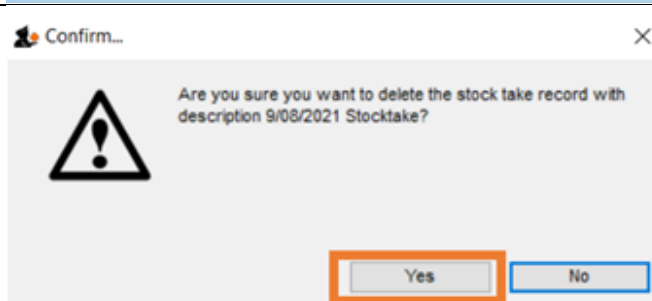
### To delete unfinished stocktakes,

Navigate to the **Item** tab and click **Stocktakes**

Select the Stocktake you wish to delete, then click **Delete stock take**



When prompted, click **Yes** to confirm you want to delete the stocktake.





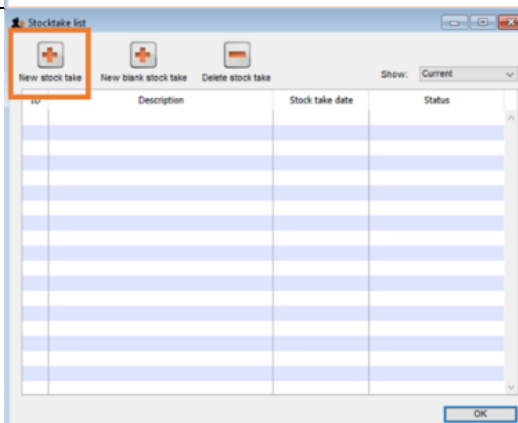
## Session 3.5 Stocktakes (Programs)

Stocktakes can also be performed for items listed under a program.

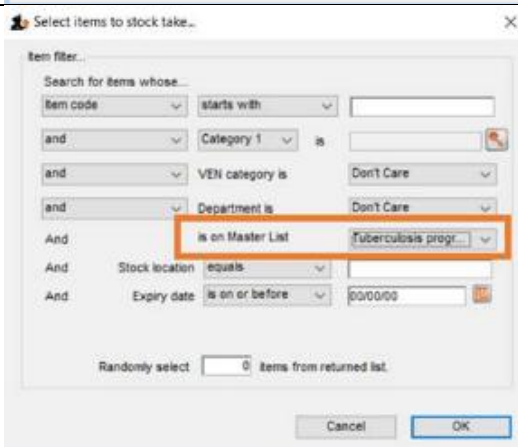
1. Navigate to the **Item** tab and click **Stocktakes**



2. The Stocktake list window appears. Click **New Stocktake**



3. Select the program from the **Master List**, and press **OK**



Complete the normal process for a stocktake.




[illegible]


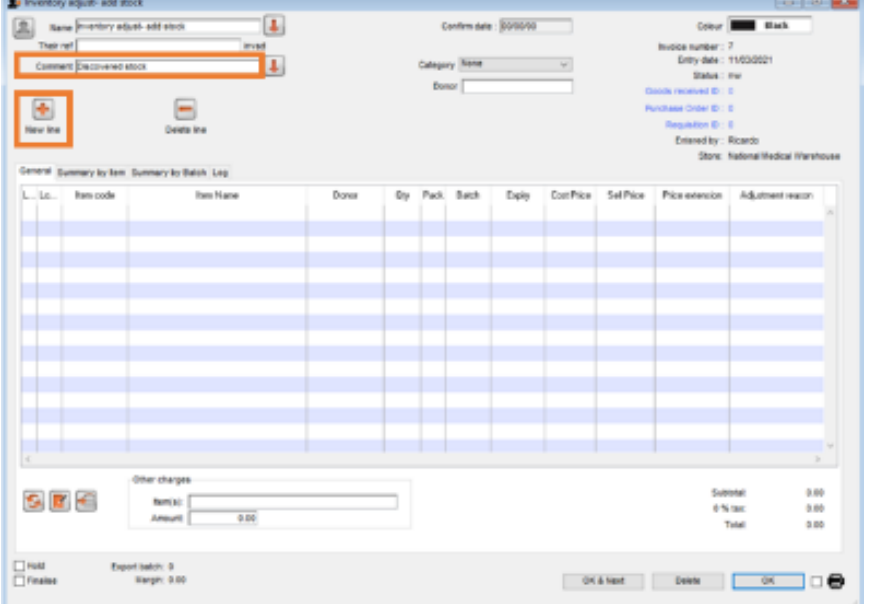
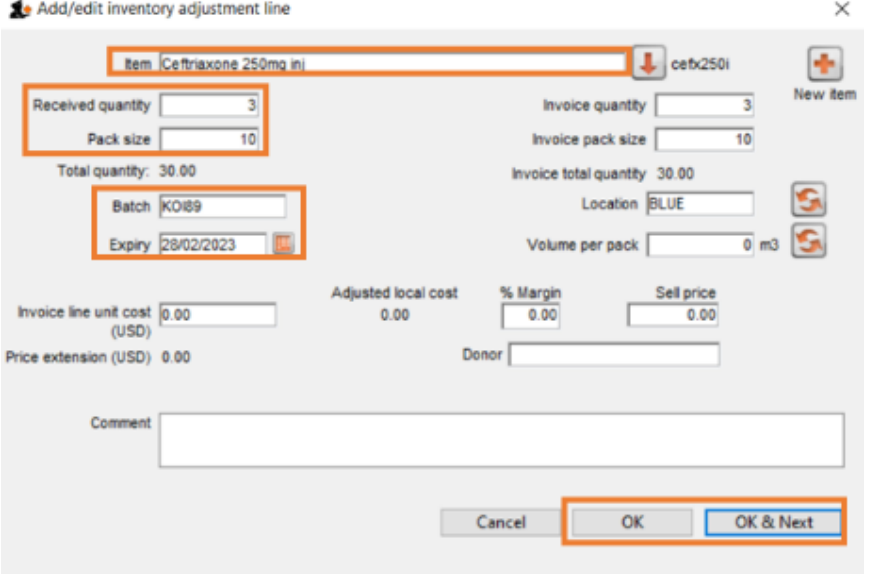
## Session 3.6 Inventory Adjustments

Inventory adjustments allow you to increase or decrease the quantity of stock that is recorded in mSupply. For example, stolen stock, damaged or expired stock, stock you don't know where it came from etc. inventory adjustments are used to deal with problems or fix mistakes. Ideally, you should always complete a stocktake when adjusting inventory.

Inventory adjustments are not used when distributing stock to customers or receiving stock from suppliers.

Let's identify the 3 buttons for inventory adjustment...

<p><b>1. Inventory adjustment list</b></p> <p><i>You can look up adjustments made by clicking this button.</i></p>	
<p><b>2. Inventory adjustment - add stock</b></p>	
<p><b>3. Inventory adjustment - reduce stock</b></p>	

<p><b>Now, to add stock,</b></p> <ol style="list-style-type: none"> <li>Navigate to the <b>Items</b> tab and click the <b>Inventory adjustment-add stock</b> button</li> </ol>	
<ol style="list-style-type: none"> <li>Enter a reason for the inventory adjustment in the <b>Comment</b> section</li> </ol> <p>Click <b>New line</b></p>	
<ol style="list-style-type: none"> <li>Search for the item and enter the quantity, batch, expiry and any other details necessary.</li> </ol> <p>Click <b>OK</b> to return to inventory adjustment window.</p> <p>Click <b>OK &amp; Next</b> to add another item.</p>	

4. Check the **Finalise** box and click **OK**

5. When prompted, click **Confirm** to enter the stock into your store

### Now, to reduce stock,

1. Navigate to the **Item** tab and click the **Inventory adjustment-reduce stock** button

2. Enter a reason for the adjustment in the **Comment** section or select a reason from the **Category** dropdown list if available

Click **New Line**

4. Check the **Print** box if you want to print the inventory adjustment.

If there are no more changes to be made, check the **Finalise** box.

Click **OK**

[illegible]

- Although they both result in a change to the available quantity of an item, the difference is the value entered.
- Stocktakes enter the total quantity available while Inventory Adjustments enter the quantity being removed or added.
- In stocktakes, you can adjust other item details like batch and expiry date. In an inventory adjustment, you can only update the quantity.

## Session 3.7 Builds

mSupply allows you to manufacture (build) a new item from two or more existing items. A build is a way of recording items you have manufactured. That is, raw materials that are in your stock are used, and a new item is created.

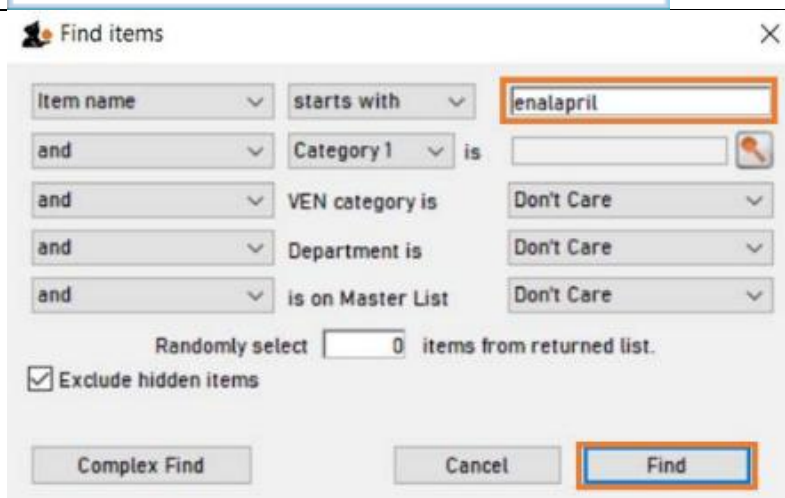
Before we can build an item, we need to ensure that the Bill of Materials (the ingredients and method) have been added to the item's details. If this is the first time you are making this item, you will need to add it as a New item in mSupply.

### To create a Bill of Materials for an item we want to build,

1. Navigate to the **item** tab and click on the **Item list** button



2. Search for the item and click **Find**



3. Double click on the item to open the item details window

Item Code	Item name	Default pack	Stock on hand	Flags
enal1s	Enalapril 1mg/mL suspension	1	0	
enal20t	Enalapril 20mg tablet	1	100	



4. Click on the **Bill of Materials** tab

Check the **Use a bill of materials to manufacture this item** box

Click **New Ingredient**

5. Enter the raw ingredient **name** and **quantity** that will be used to build the new item, then click **OK**


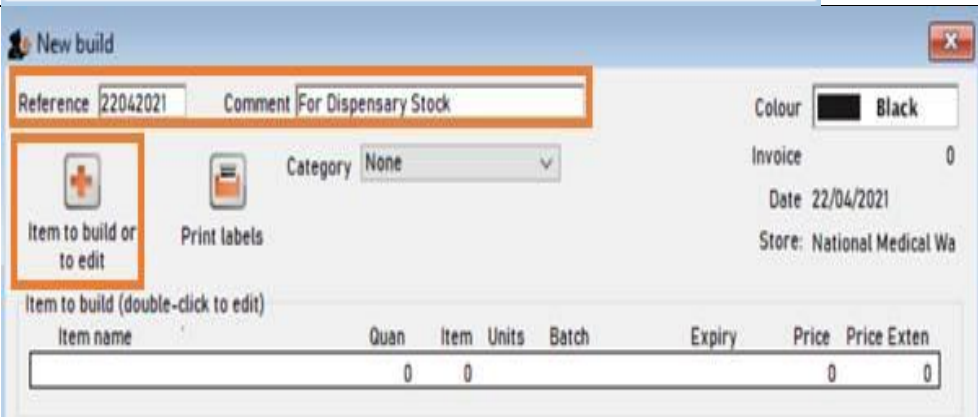
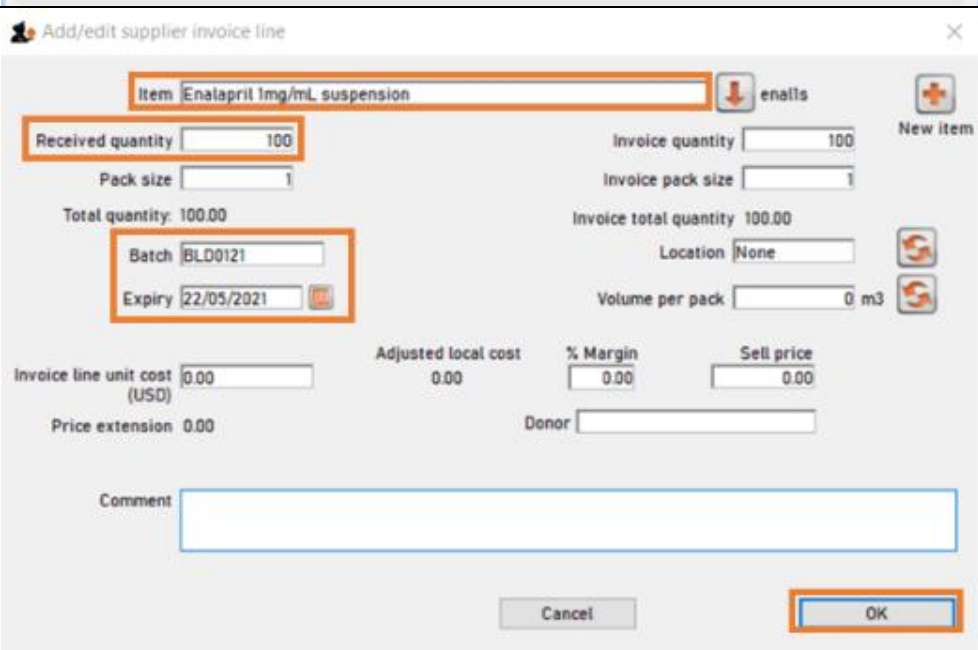
Click **New Ingredient** to add another ingredient, as required *mSupply will calculate how much you need of each ingredient each time you make this item even if you require different quantities of final product.*

6. Enter the **Quantity of finished product**

Enter the **Manufacture Method** (It is useful to add expiry and storage details here also)

Click **OK**

The Builds function is where you add the Bill of Materials to the new item you want to build. It takes the raw ingredients out of stock and adds stock to the item you are building.

<p><b><u>To add a new build,</u></b></p> <p>Navigate to the <b>Item</b> tab and click the <b>New Builds</b> button</p>	 <p>The screenshot shows the mSupply navigator interface. The 'Item' tab is selected and highlighted with an orange box. Below the top navigation bar, there are several functional area buttons. The 'Builds' button, represented by a plus sign and a person icon, is highlighted with an orange box. Other visible buttons include 'Items', 'Reports', 'Inventory adjustments', 'Stock', 'Locations', 'Replenishments', 'Departments', 'Item categories', and 'Master lists'.</p>
<p><b><u>To add the item to the build,</u></b></p> <p>Enter a <b>Reference</b> for your build and a <b>Comment</b>, if required</p> <p>Click the <b>Item to build or to edit</b> button</p>	 <p>The screenshot shows the 'New build' dialog box. The 'Reference' field contains '22042021' and the 'Comment' field contains 'For Dispensary Stock', both highlighted with orange boxes. The 'Colour' is set to 'Black'. The 'Category' is set to 'None'. The 'Item to build or to edit' button, which has a plus sign and a person icon, is highlighted with an orange box. Below these fields is a table for 'Item to build (double-click to edit)' with columns: Item name, Quan, Item Units, Batch, Expiry, Price, and Price Exten. The table currently shows one row with zeros in the 'Quan' and 'Item Units' columns.</p>
<p><b><u>To add the build details,</u></b></p> <p>Enter the <b>item</b> you want to build</p> <p>Enter the <b>quantity</b> to build, <b>batch</b> and <b>expiry</b>, then click <b>OK</b>. You can edit the cost and sell price once you have added the Bill of Materials. Click <b>OK</b></p>	 <p>The screenshot shows the 'Add/edit supplier invoice line' dialog box. The 'Item' field contains 'Enalapril 1mg/mL suspension' and is highlighted with an orange box. The 'Received quantity' is set to '100' and is highlighted with an orange box. The 'Batch' is set to 'BLD0121' and is highlighted with an orange box. The 'Expiry' is set to '22/05/2021' and is highlighted with an orange box. Other fields include 'Invoice quantity' (100), 'Invoice pack size' (1), 'Invoice total quantity' (100.00), 'Location' (None), 'Volume per pack' (0 m3), 'Adjusted local cost' (0.00), '% Margin' (0.00), 'Sell price' (0.00), 'Price extension' (0.00), and 'Donor'. The 'OK' button at the bottom right is highlighted with an orange box.</p>

### To add the Bill of Materials,

Click on the **Bill of Materials** tab

Click **Add Bill of Materials** and click **OK** when prompted

*If you adjust the build quantity after this step, you will need to delete the individual ingredients under the ingredients tab first before clicking **Add Bill of Materials** again for revised quantities*

**New build**

Reference: 22042021 Comment: For Dispensary Stock Colour: Black

Invoice: 3 Date: 22/04/2021 Store: National Medical Wa

Category: None

Item to build or to edit: Enalapril 1mg/mL suspension

Item to build (double-click to edit):

Item name	Quan	Item	Units	Batch	Expiry	Price	Price Exten
Enalapril 1mg/mL suspension	100	1		BLD0121	22/05/2021	0	0

Ingredients: **Bill of materials** Manufacturing Method

**Add Bill of Materials** Calculate Yields Print Yield Report

Line	Item name	Units	Target Quan	Total cost	Yield
1	Enalapril 20mg tablet		5	0	0
2	Ora-Blend Suspending Vehicle 100 mL		1	0	0

Current status: mw Change status to: No change

Summary: Cost adjusted yield: 0 Theoretical yield: 100.00 Actual amount built: 100.00

Delete Cancel OK

### To review the method,

Click on the **Manufacturing Method** tab

**New build**

Reference: 22042021 Comment: For Dispensary Stock Colour: Black

Invoice: 3 Date: 22/04/2021 Store: National Medical Wa

Category: None

Item to build or to edit: Enalapril 1mg/mL suspension

Item to build (double-click to edit):

Item name	Quan	Item	Units	Batch	Expiry	Price	Price Exten
Enalapril 1mg/mL suspension	100	1		BLD0121	22/05/2021	0	0

Ingredients: Bill of materials **Manufacturing Method**

1. Crush tablets in mortar to a fine powder.  
2. Add Ora-Blend to form a smooth paste.  
3. Gradually add the diluent and transfer to the final measuring flask, rinsing the mortar well. Mix well.  
4. Make up to the final volume and mix well.  
5. Label and package product appropriately.  
Shelf life - 30 days  
Storage - Refrigeration is preferred, but may be stored at room temperature if this is more practical and temperatures greater than 25 degrees are avoided

### To allocate batch lines to ingredients,

Click on the **Ingredients** tab  
Double click on each ingredient to allocate stock

**New build**

Reference: 22042021 Comment: For Dispensary Stock Colour: Black

Invoice: 3 Date: 22/04/2021 Store: National Medical Wa

Category: None

Item to build or to edit: Enalapril 1mg/mL suspension

Item to build (double-click to edit):

Item name	Quan	Item	Units	Batch	Expiry	Price	Price Exten
Enalapril 1mg/mL suspension	100	1		BLD0121	22/05/2021	0	0

Ingredients: **Ingredients** Bill of materials Manufacturing Method

New ingredient Delete line ☐ This is a projected build

Line	Item code	Item name	Qty	Pack	Batch	Expiry	Price	Price Exten
1	enal20t	Enalapril 20mg tablet	5	1	none		0.00	0.00
2	orab01	Ora-Blend Suspending Vehicle 100 mL	1	1	none		0.00	0.00

Manually select a batch line, or click **Redistribute all** to automatically allocate a batch

Click **OK** to return to main window or **OK & Next** to move to the next ingredient.

Edit line...

Item: Enalapril 20mg tablet    ena20t

Line:

Quan:  5 of 0

Pack:

Bulk/Outer pack size: 0

Buttons: Add Place holder    **Re-distribute all**    Re-lookup Sell Price

Line	Issue	Available	Tot in store	Pack	Hold	Batch	Expiry	Supplier	Donor	Location	Cost Price	Sell Price
1	5	0	0	1		none					0.00	
2	0	100	100	1		KUI78	30/09/2026	invad			0.50	

Total quantity issued: 5  
Total quantity available: 100

Buttons: Cancel    OK    **OK & Next**

### To confirm the build,

Review; the **Summary** shows the price of ingredients and sell price for the new item. You can edit this by double clicking on the item to build  
Check **Print** for the picking slip for ingredients  
Change the status to **Confirmed** when you are ready to build the item  
Click **OK** and **Confirm** when prompted.

New build

Reference: 272342021    Comment: For Dispensary Stock    Colour: Black

Category: None    Invoice: 3    Date: 22/04/2021    Store: National Medical W

Buttons: Item to build or to edit    Print labels

Item to build (double-click to edit)

Item name	Quan	Item units	Batch	Expiry	Price	Price Exten
Enalapril 1mg/mL suspension	100	1	BLO0121	22/05/2021	0.15	15

Ingredients    Bill of materials    Manufacturing Method

Buttons: New ingredient    Delete line    ☐ This is a projected build




Line	Item code	Item name	Qty	Pack	Batch	Expiry	Price	Price Exten
1	ena20t	Enalapril 20mg tablet	5	1	KUI78	30/09/2026	0.10	0.50
2	ora0001	Oral-based Suspending Vehicle 100 mL	1	1	RS443	30/09/2026	12.50	12.50

Buttons: Delete    Change status to: **Confirmed (no)**

Summary

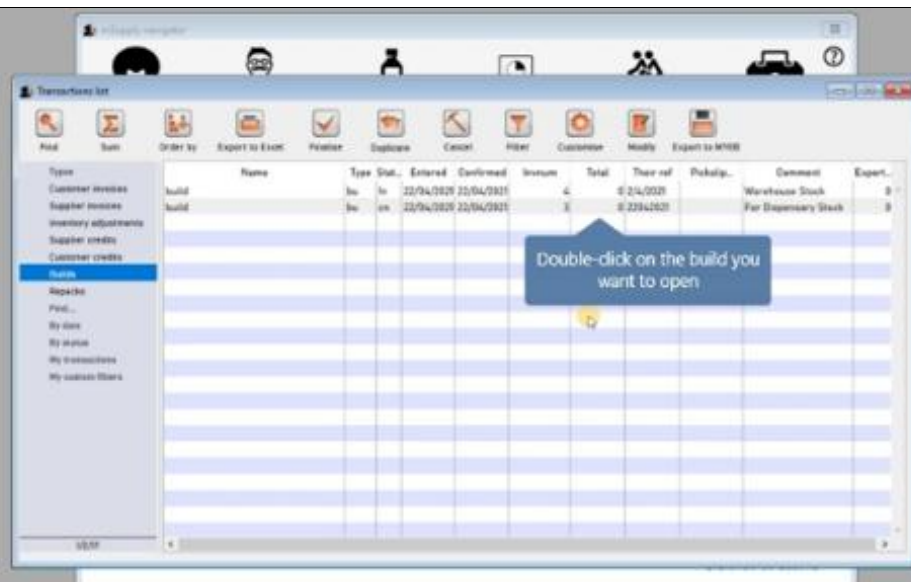
Total ingredient cost	15.00
Total built item selling price	15.00
Profit over ingredient cost	0.00
Margin on ingredient cost	0.00

Buttons: Delete    Cancel    **OK**    ☒    ☒

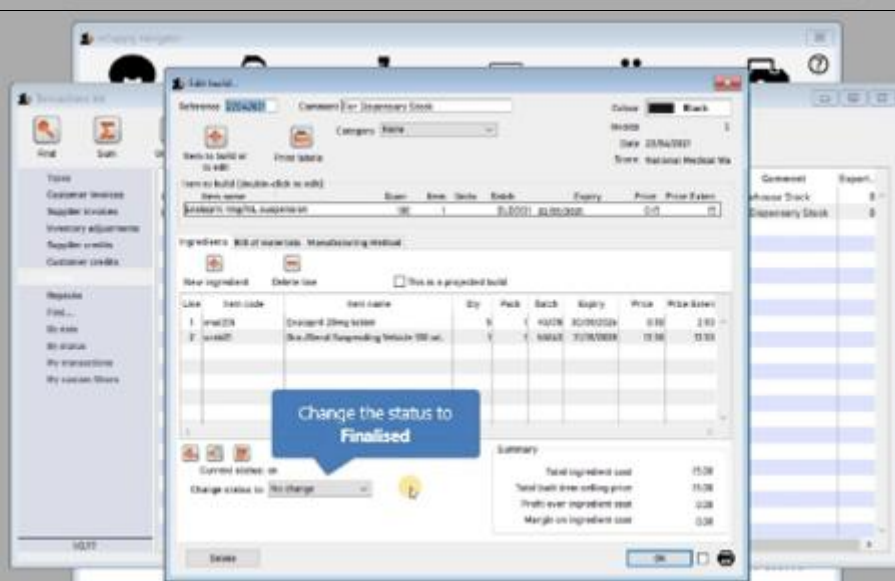
<p><b>To finalise a build,</b></p> <ol style="list-style-type: none"> <li>1. Navigate to the <b>Item</b> tab</li> </ol>	
<ol style="list-style-type: none"> <li>2. Click the <b>Build list</b> button to open your previous and current builds</li> </ol>	
<ol style="list-style-type: none"> <li>3. Click <b>Find</b> to open your most recent transactions</li> </ol>	



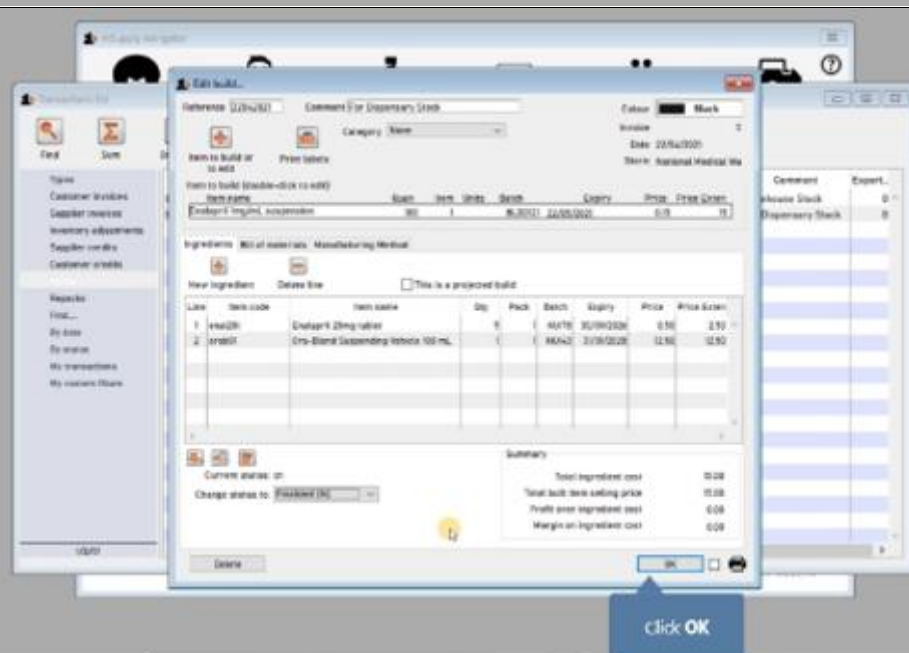
- Double click on the build you want to open



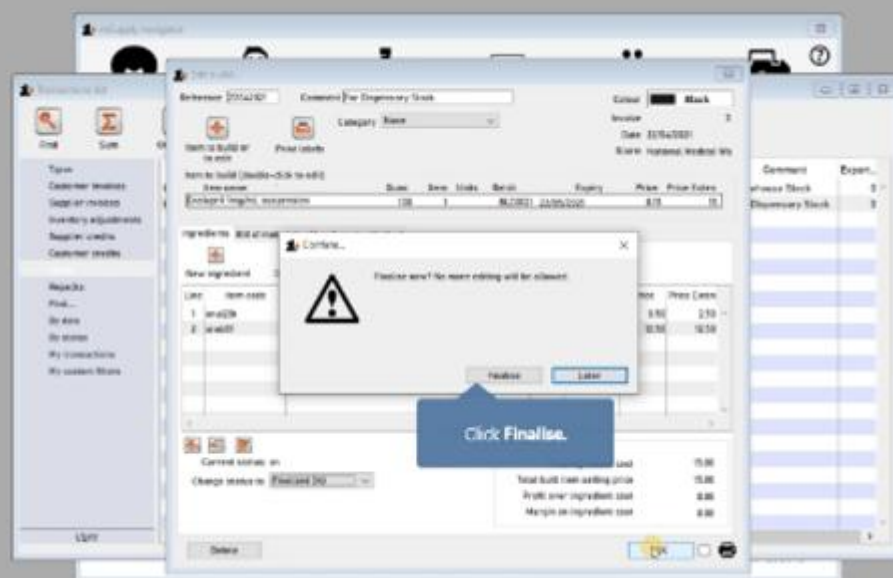
- Change the status to **Finalised**



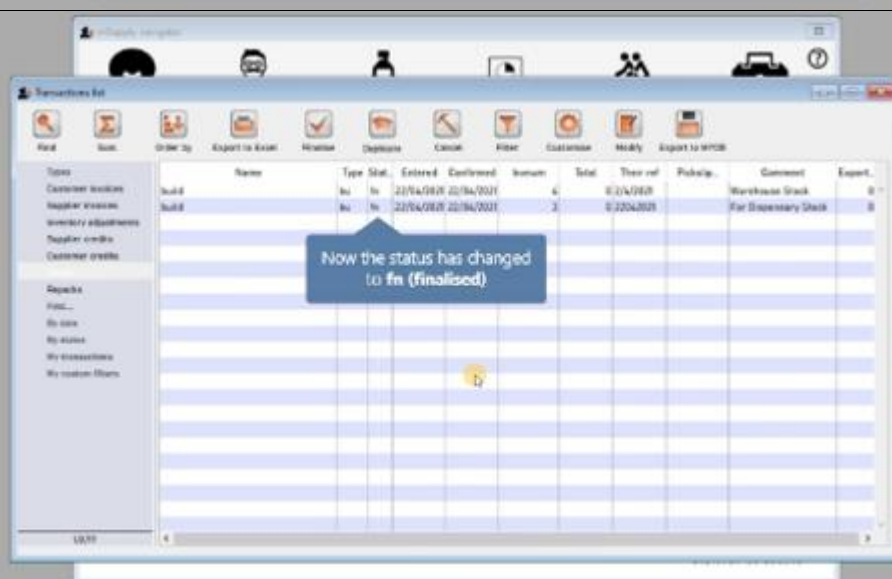
- Click **OK**



7. Click **Finalise**



8. Now the status has changed to **fn (Finalised)**



Builds have 4 statuses:

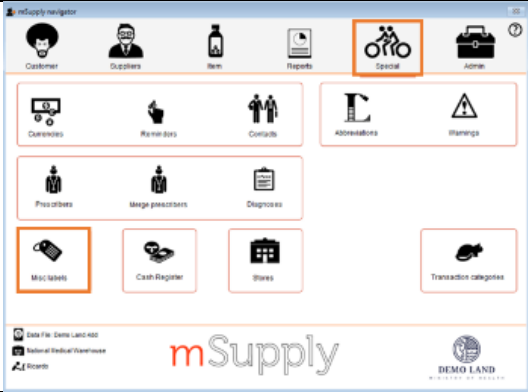
- **New (nw)**: A new build is being entered, but it has not been saved.
- **Suggested (sg)**: A build has been entered but has not yet been confirmed. If the stock lines have been entered, raw material stock is reduced so that it is no longer available for other invoices but the new item is not yet entered into stock. Builds may be left in **sg** status until you are ready to manufacture.
- **Confirmed (cn)**: The item to build has been entered into stock.
- **Finalised (fn)**: The build can no longer be edited. Builds should be finalised once you have manufactured the item.



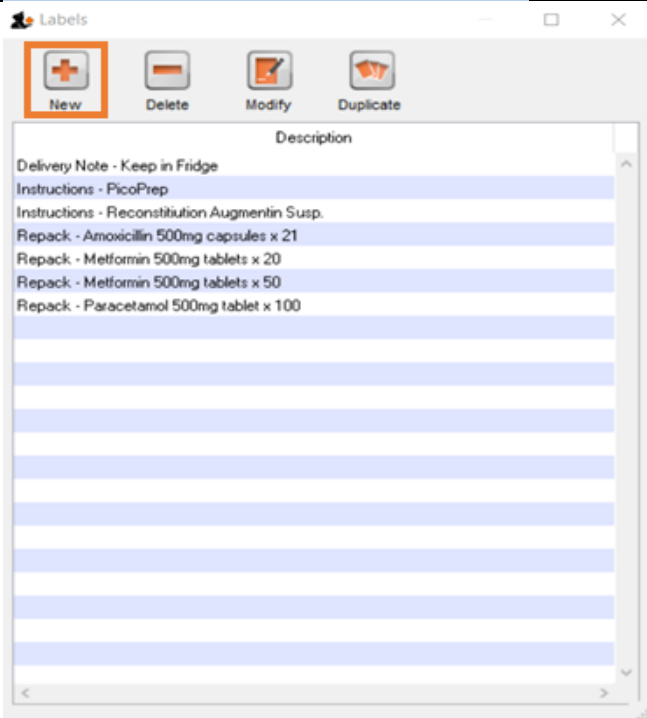
# Session 3.8 Miscellaneous Labels

The **Miscellaneous Labels** function allows you to create and save labels that you can print at any time from a label printer. This is particularly helpful for labels you print regularly such as Repacks labels.

To open **Miscellaneous Labels**,  
  
Navigate to the **Special** tab and click the **Misc labels** button



To add a new label, click **New**  
  
You can Delete or Duplicate labels from this window



To enter label details,

Enter **Label name** and **Label details**.

Click **OK** to save the label.

**Add label**

Normal Multiple

Label name Repack - Atenolol 50mg tablets x 30

Label details

Heading 30 x Atenolol 50mg tablets

Body Batch:  
Expiry:

Left footers Right footers

Centred Footer National Medical Warehouse - Demo Land

Size  
10  
10  
10  
10  
10

Line spacing 1 mm

Quantity to print 1

Print Cancel OK

The Add Label window in details (as can be seen above):

**Label name:** This field will not print on the label.

**Label details:** These fields will print on the label in approximately the same position that they are on the screen.

**Size:** the font size you wish to use for each part of the label.

**Line spacing:** the spacing you want between each line of text.

**Quantity to print:** Specify how many copies of this label you wish to print.

**Print:** Clicking this button will print to your default mSupply label printer. It will print the number specified in the Quantity to print field.

**Cancel:** Clicking this will close the window without saving any changes you have made.

**OK:** Clicking this will save any changes you have made and close the window.

## Session 3.9 Basic Reports - Transactions

Transaction reports summarize supplier, customer and patient transaction data from your store.

Before generating any report, let us look at the details of the Transaction report window.

**Type of report:** Here you select which transaction report you want to use. Each report generates different types of data and will include varying combinations of names, items, values and quantities.

**Data range:** Here you enter the date range of transactions to report on. You can type in the date range or use the dropdown menu to select a common date range.

**Transaction type:** This allows you to choose whether it's a sales or purchases transaction, normal and/or stock transfers.

**Transaction category filter:** This allows you to select the transaction source and transaction category.

**Name Filter:** Here you can enter the name or code of the customer, supplier or patient you want to report on.

**Item filter:** Here you can specify the item categories to include in the report.

### To generate a report on Total Value of Stock Issued,

1. Navigate to the **Reports** tab and click on **Transactions**

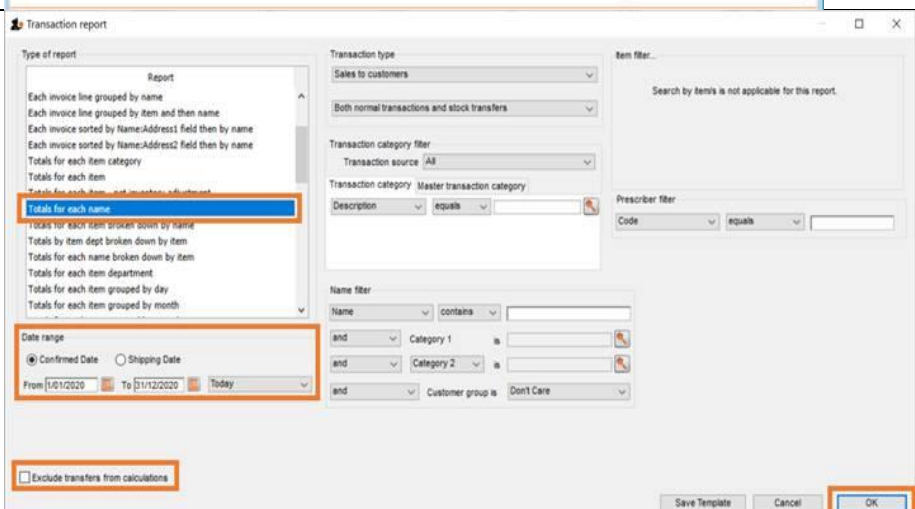


2. In the **Type of Report** box, select **Totals for each name**

In the **Date range** section, set the timeframe for your report

Ensure the **Exclude transfers from calculations** box is **NOT** ticked

Click **OK**



3. Export to Excel by selecting **Export to Excel** and click **OK**

4. Report opens in Excel:  
**Total value of stock issued**

...showing **Report title, Name, Transaction count, Value, Total**

	A	B	C
1		Totals by name: Sales, confirm date from 1/01/2020 to 31/12/2020: for store(s) National Medical Warehouse	
2			
3	Name	Transaction Count	Value
4	Balwyn Warehouse	12	58600
5	Thornbury Warehouse	11	60705
6	Total	23	119305

To generate a report on **Total Quantities of items issued to each facility**,

1. Navigate to the **Reports** tab and click the **Transactions** button

2. In the **Type of Report** box, select **Cross-tab: items in rows, names in columns, quantity in cells**

Apply the required **date range**

Ensure the **Exclude transfers from calculations** box is **NOT** ticked

Use the **Item filter** to select the items you wish to report on, set up a **Flag**

Click **OK**

3. Report opens in Excel:  
**Total Quantities of items issued to each facility**

....showing **Items, Customers, Quantities**.

	A	B	C	D	E	F
1		<b>Units</b>	<b>Hawthorn East Clinic</b>	<b>Kerang Hospital</b>	<b>Mont Albert CHC</b>	<b>Sandstone Private Pharmacy</b>
2	Amoxicillin 500mg tablet	ea	90	490	130	90
3	Ceftriaxone 1g injection	ea	5	20	0	0

To generate a report on  
Total Quantity of stock  
issued from a facility –  
Quarterly breakdown

1. Navigate to the **Reports** tab

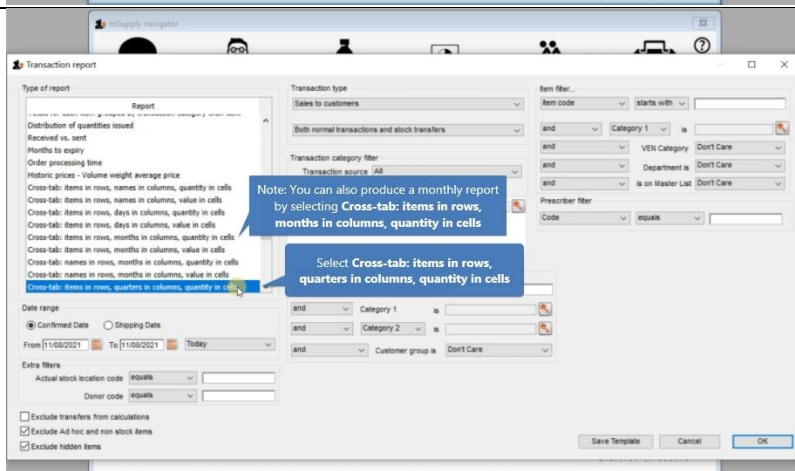


2. Click on **Transactions**

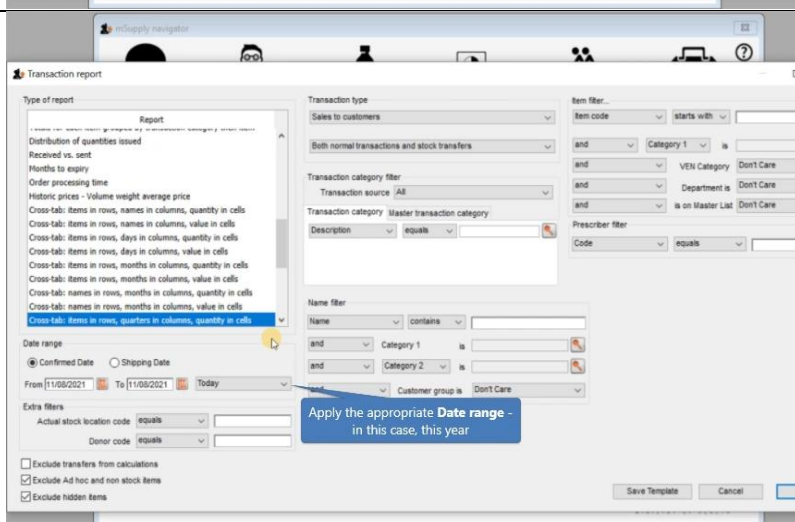


3. Select **Cross-tab: Items in rows, quarters in columns, quantity in cells**

You can also produce a monthly report by selecting **Cross-tab: Items in rows, months in columns, quantity in cells**



4. Apply the appropriate **Date range** (in this case, this year)





- Ensure the **Exclude transfers from calculations** box is NOT ticked

Transaction report

Type of report: Report

Transaction type: Sales to customers

Both normal transactions and stock transfers

Transaction category filter: Transaction source All

Transaction category: Master transaction category

Description equals

Name filter: Name contains

Category 1 is

Category 2 is

Customer group is Don't Care

Item filter: Item code starts with

Category 1 is

VEN Category Don't Care

Department is Don't Care

is on Master List Don't Care

Prescriber filter: Code equals

Date range: Confirmed Date Shipping Date

From 1/01/2021 To 1/08/2021 This year

Extra filters: Actual stock location code equals

Donor code equals

☐ Exclude transfers from calculations

☒ Exclude Ad hoc and non stock items

☒ Exclude hidden items

Save Template Cancel OK

- Apply any other filters as necessary

Transaction report

Type of report: Report

Transaction type: Sales to customers

Both normal transactions and stock transfers

Transaction category filter: Transaction source All

Transaction category: Master transaction category

Description equals

Name filter: Name contains

Category 1 is

Category 2 is

Customer group is Don't Care

Item filter: Item code starts with

Category 1 is

VEN Category Don't Care

Department is Don't Care

is on Master List Don't Care

Prescriber filter: Code equals

Date range: Confirmed Date Shipping Date

From 1/01/2021 To 1/08/2021 This year

Extra filters: Actual stock location code equals

Donor code equals

☐ Exclude transfers from calculations

☒ Exclude Ad hoc and non stock items

☒ Exclude hidden items

Save Template Cancel OK

- Apply the required item filter. In this example, select **Tuberculosis program** from the Master list dropdown box

Transaction report

Type of report: Report

Transaction type: Sales to customers

Both normal transactions and stock transfers

Transaction category filter: Transaction source All

Transaction category: Master transaction category

Description equals

Name filter: Name contains

Category 1 is

Category 2 is

Customer group is Don't Care

Item filter: Item code starts with

Category 1 is

VEN Category Don't Care

Department is Don't Care

is on Master List Tuberculosis progr...

Prescriber filter: Code equals

Date range: Confirmed Date Shipping Date

From 1/01/2021 To 1/08/2021 This year

Extra filters: Actual stock location code equals

Donor code equals

☐ Exclude transfers from calculations

☒ Exclude Ad hoc and non stock items

☒ Exclude hidden items

Save Template Cancel OK

- Click **OK**

Transaction report

Type of report: Report

Transaction type: Sales to customers

Both normal transactions and stock transfers

Transaction category filter: Transaction source All

Transaction category: Master transaction category

Description equals

Name filter: Name contains

Category 1 is

Category 2 is

Customer group is Don't Care

Item filter: Item code starts with

Category 1 is

VEN Category Don't Care

Department is Don't Care

is on Master List Tuberculosis progr...

Prescriber filter: Code equals

Date range: Confirmed Date Shipping Date

From 1/01/2021 To 1/08/2021 This year

Extra filters: Actual stock location code equals

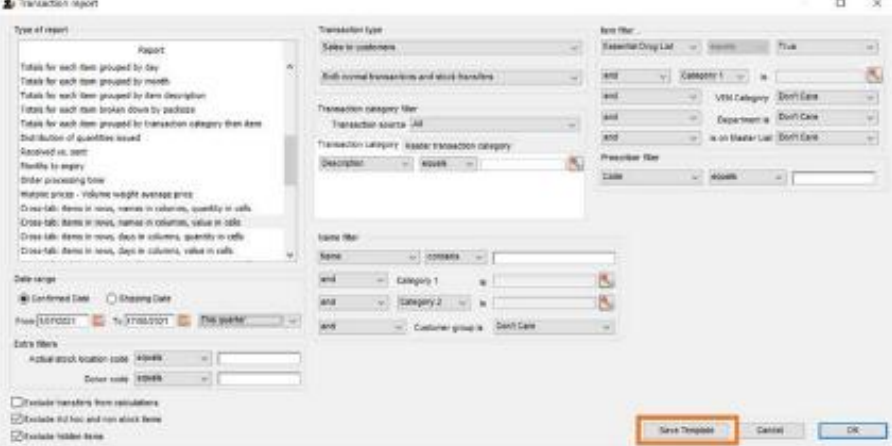
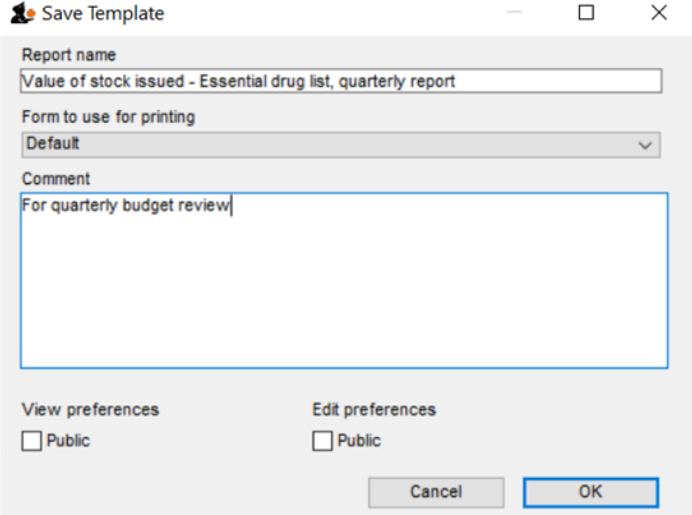

Donor code equals

☐ Exclude transfers from calculations

☒ Exclude Ad hoc and non stock items

☒ Exclude hidden items

Save Template Cancel OK

9. Report opens in Excel: <b>Total Quantity of stock issued from a facility – Quarterly breakdown</b>	<table><tr><th></th><th>A</th><th>B</th><th>C</th><th>D</th></tr><tr><td>1</td><td></td><td><b>Units</b></td><td><b>2021 Q1</b></td><td><b>2021 Q2</b></td></tr><tr><td>2</td><td><b>Isoniazid 300mg tab</b></td><td>ea</td><td>600</td><td>400</td></tr><tr><td>3</td><td><b>Rifampicin 300mg tab</b></td><td>ea</td><td>500</td><td>400</td></tr><tr><td>4</td><td><b>Ethambutol 400mg tab</b></td><td>ea</td><td>500</td><td>300</td></tr><tr><td>5</td><td><b>Pyrazinamide 500mg tab</b></td><td>ea</td><td>400</td><td>300</td></tr></table>		A	B	C	D	1		<b>Units</b>	<b>2021 Q1</b>	<b>2021 Q2</b>	2	<b>Isoniazid 300mg tab</b>	ea	600	400	3	<b>Rifampicin 300mg tab</b>	ea	500	400	4	<b>Ethambutol 400mg tab</b>	ea	500	300	5	<b>Pyrazinamide 500mg tab</b>	ea	400	300
	A	B	C	D																											
1		<b>Units</b>	<b>2021 Q1</b>	<b>2021 Q2</b>																											
2	<b>Isoniazid 300mg tab</b>	ea	600	400																											
3	<b>Rifampicin 300mg tab</b>	ea	500	400																											
4	<b>Ethambutol 400mg tab</b>	ea	500	300																											
5	<b>Pyrazinamide 500mg tab</b>	ea	400	300																											
...showing Items, First Quarter, Second Quarter																															
<b>Saving Report Templates</b> Sometimes you will need to apply so many specific filters to generate a particular report. It is useful to save report templates so as to use them again.																															
<b>To create a report template,</b>																															
<b>To save the template,</b>																															
<b>To run a saved template,</b>																															
1. Navigate to the <b>reports</b> tab and click on <b>Run saved report</b>																															



2. Click on the report you wish to run, then click **OK**

To edit and delete templates,

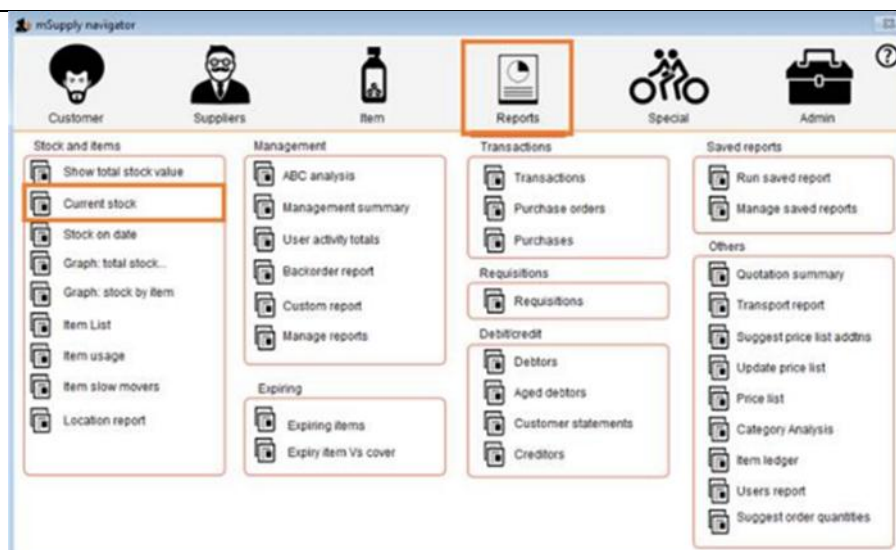
1. Navigate to the **Reports** tab and click on **Manage saved reports**

2. Select the report you wish to modify, then click the appropriate **Edit** or **Delete** button, then follow the prompts

## Session 3.10 Basic Reports – Stock and Items

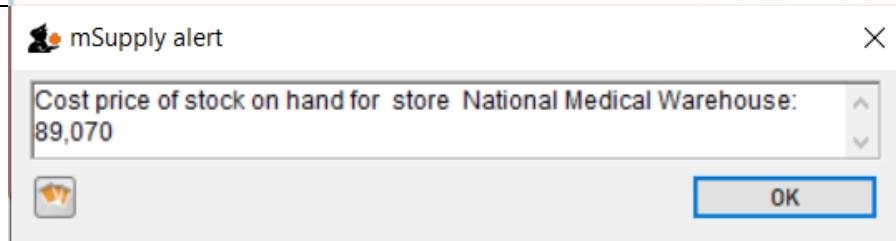
Stock and item reports are useful for reporting on item values, quantities or usage.

Let's look at some reports....



### 1. Show total stock value

This report shows the total monetary value of stock in your store



### 2. Current stock

This report shows the stock quantity for each item in your store or across multiple stores

Stock totals for each item for store(s) National Medical Warehouse			
Location	Item code	Item name	Total\quantity
BLUE	amo500t	Amoxicillin 500mg tab	4400
BLUE	cefx250i	Ceftriaxone 250mg inj	4000
BLUE	chlp100t	Chloroquine phosphate 100mg (base) tab	7000
BLUE	chlp50s	Chloroquine phosphate 50mg/5mL syrup	2000
BLUE	dia5t	Diazepam 5mg tab	8000
BLUE	enal1s	Enalapril 1mg/mL suspension	200
BLUE	enal20t	Enalapril 20mg tablet	80
BLUE	ibu200t	Ibuprofen 200mg tab	9000
BLUE	iso300t	Isoniazid 300mg tab	8000
BLUE	mef250t	Mefloquine 250mg tab	4000
BLUE	met500t	Metformin 500mg tab	9000
BLUE	met500i	Metronidazole 500mg/100mL inj	4000
BLUE	par500t	Paracetamol 500mg tab	10000
BLUE	pri75t	Primaquine diphosphate 7.5mg tab	6000
BLUE	rilis1t	Rifampicin 150mg + isoniazid 150mg tab	5000
BLUE	rilis7t	Rifampicin 150mg + isoniazid 75mg tab	5000
BLUE	rif150t	Rifampicin 150mg tab/cap	5600

### 3. Stock on due

This report shows you the quantity and value of stock in your store on a specified date

Stock report on a particular date

Show stock value on 26/04/2021 Yesterday

Type of report

☒ Show items only

☐ Show items with batches

☐ Show batches with Summary

Start or end of the day

☒ Stock at start of the day

☐ Stock at end of the day

Report on items whose...

Item code starts with

and Category 1 is

and VEN category is Don't Care

and Department is Don't Care

and is on Master List Don't Care

and donor equals

☐ Include item with no stock

☒ Exclude Ad hoc and non stock items

☒ Exclude hidden items

☒ Open report in Excel

Save Template Cancel OK

### 4. Item list

This report allows you to view all items in your store including the location and stock on hand

Item list report: for store(s) National Medical Warehouse			
code	item name	Item Location	Stock on hand
amo500t	Amoxicillin 500mg tab	A1:1 Shelf	4400
cefx250i	Ceftriaxone 250mg inj	A1:1 Shelf	4000
chlp100t	Chloroquine phosphate 100mg (base) tab	A1:1 Shelf	7000
chlp50s	Chloroquine phosphate 50mg/5mL syrup	A1:1 Shelf	2000
dia5t	Diazepam 5mg tab	A1:1 Shelf	8000
enal1s	Enalapril 1mg/mL suspension	A1:1 Shelf	200
enal20t	Enalapril 20mg tablet	A1:1 Shelf	80
ibu200t	Ibuprofen 200mg tab	A1:1 Shelf	9000
iso300t	Isoniazid 300mg tab	A1:2 Shelf	8000
mef250t	Mefloquine 250mg tab	A1:2 Shelf	4000
met500t	Metformin 500mg tab	A1:2 Shelf	9000
met500i	Metronidazole 500mg/100mL inj	A1:2 Shelf	4000
par500t	Paracetamol 500mg tab	A1:2 Shelf	10000
pri75t	Primaquine diphosphate 7.5mg tab	B1:1 Shelf	6000
ri1is1t	Rifampicin 150mg + isoniazid 150mg tab	B1:1 Shelf	5000
ri1is7t	Rifampicin 150mg + isoniazid 75mg tab	B1:1 Shelf	5000
rif150t	Rifampicin 150mg tab/cap	B1:1 Shelf	5600

**5. Item slow movers**  
This report displays items over the maximum stock threshold you want in your store

Item slow movers

Report on items whose...

Item code

starts with

(Leave blank for all items- warning: may take a few minutes to produce the report for all items)

and

Category 1

is

and

Department is

Don't Care

and

VEN Category

Don't Care

and

is on Master List

Don't Care

and donor

equals

Base analysis on

12

Months of usage data

Report on items that have more than

12

months stock on hand

☒ Open report in Excel

Save Template

Cancel

OK

**6. Location report**  
This report shows how much space each location has available for stock

Location summary report Ministry of Health						
						Page 1 of 1
Location	Description	Type	Capacity	Used	Available %	Store
BLUE	Blue Shelf		50	0	20	National Medical Warehouse
RED	Red Shelf		100	0	80	National Medical Warehouse

**7. Item usage**  
This report displays a facility's average consumption of each item per month, based on previous usage within a given timeframe.

**To generate an Item usage report,**

1. Navigate to the **Reports** tab

mSupply navigator

Customer

Suppliers

Item

Reports

Special

Admin

Stock and items

Show total stock value

Current stock

Stock on date

Graph: total stock...

Graph: stock by item

Item List

Item usage

Item slow movers

Location report

Management

ABC analysis

Management summary

User activity totals

Backorder report

Custom report

Manage reports

Expiring

Expiring items

Expiry item Vs cover

Transactions

Purchases

Requisitions

Requisitions

Debit/credit

Debtors

Aged debtors

Customer statements

Creditors

Saved reports

Unsaved report

Manage saved reports

Others

Quotation summary

Transport report

Suggest price list addns

Update price list

Price list

Category Analysis

Item ledger

Users report

Suggest order quantities

Data File: DemoLand\_May2021.4dd

National Medical Warehouse

Ricardo

mSupply

DEMO LAND  
MINISTRY OF HEALTH

2. Click on **Item usage**

3. Here the **Item usage report** is selected by default. There is also an **Item usage (Excel) report** which will automatically open in Excel. The information is the same in both reports. Select **Item usage (Excel) report**

4. The **Include items whose** box is your item filter. Apply any filters you need to. In this example, we are looking at items on your **Essential Drugs List**, so select this.



5. If you want to, you can click the **Refresh** button to show how many times match your filter

6. You can change the threshold for **Months of Stock on Hand**. The default is **0** which will report on any items with stock remaining.

7. You can choose how many months of data to base your report on

8. Ensure the **Exclude transfers from usage calculations** box is NOT ticked

9. Click **OK**

10. Report opens in Excel:  
**Items usage report**

....showing Report title,  
Store, Item code, Item name,  
VEN categories....

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Item usage [Excel] report (Based on last 6 months of usage data): Essential Drug List equals True, for store(s) National Medical Warehouse														
2															
3	Store	Item Code	Item Name	VEN	Stock on Hand	Stock On Order	AMC 12 mths	AMC 24 mths	AMC 6 mths	3 Months ago	Last Month	This Month	Months of Stock Cover	Exp. in 6 mths	Exp. in 12 mths
4	National Medical Warehouse	amo500t	Amoxicillin 500mg tablet		410	0	23	11	45	0	0	190	9	310	310
5	National Medical Warehouse	cpo500t	Ciprofloxacin 500mg tablet		450	0	88	124	125	0	0	0	4	450	450
6	National Medical Warehouse	iso300t	Isoniazid 300mg tablet		9,600	0	33	17	67	0	0	400	144	50	1,000
7	National Medical Warehouse	met500t	Metformin 500mg tablet		100	500	13	6	25	0	0	0	4	0	100
8	National Medical Warehouse	rf150t	Rifampicin 150mg capsule		5,640	0	30	15	60	0	0	360	94	100	2,000

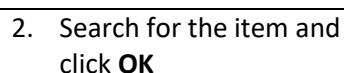
**Medicines availability** is the % availability of items across different levels of the health system which is the primary indicator of success for the health supply chain.

Determining medicines availability involves:

- Creating a basket of goods which is a list containing critical stock ranging from 20-30 items for health facilities and 100 items for medical stores.
- Auditing the availability of critical stock on a regular basis.



1. Navigate to the **Items** tab and click on the **Items List** button



3. Double click on the item to open the **Item Details** window

173

4. In the **Items** details window on the **General** tab, check the **Critical stock** checkbox, then click **OK**

Item details window showing the 'General' tab. The 'Item name' is 'Amoxicillin 500mg tablet' and the 'Item code' is 'amo500'. The 'Stock category' section has 'Critical stock' checked. The 'OK' button is highlighted with a red box.

5. Search for the next item by going back to the **Item List** window and click **Find**

Repeat the process until all the items are in your Basket of Goods have been checked as Critical stock.

Item List window showing a table of items. The 'Find' button is highlighted with a red box. The table has columns: Item Code, Item name, Default pack, Stock on hand, and Flags. The first row shows 'amo500', 'Amoxicillin 500mg tablet', '100', '1270', and 'Antibiotic'.

Item Code	Item name	Default pack	Stock on hand	Flags
amo500	Amoxicillin 500mg tablet	100	1270	Antibiotic

### To review your Basket of Goods,

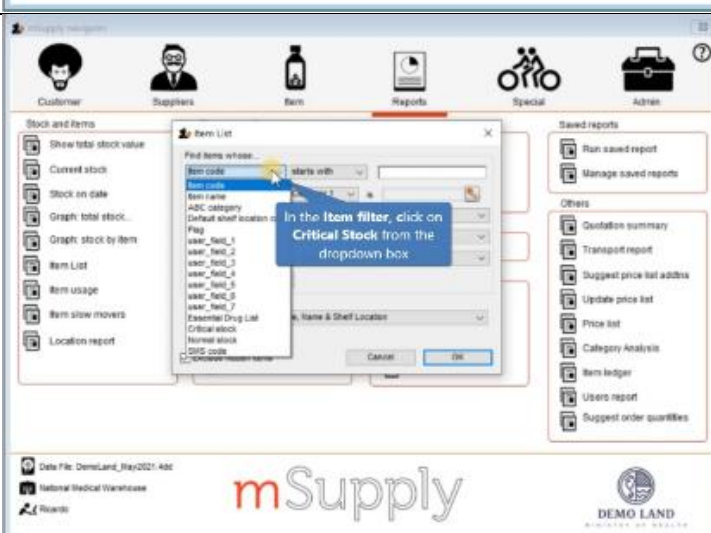
1. Click on the **Reports** tab

mSupply 'Reports' tab interface. The 'Reports' tab is selected, and a blue box highlights the 'Reports' tab label. The interface shows various report categories like Stock and Items, Management, and Requisitions.

2. Click on the **Items List**



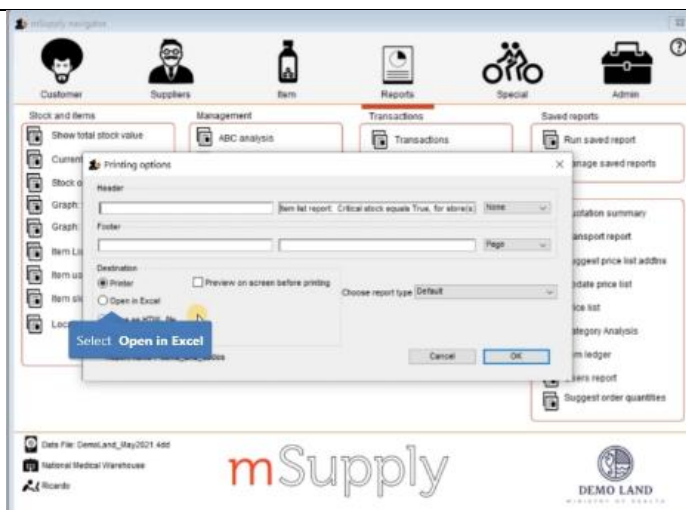
3. In the **Item filter**, click on **Critical Stock** from the dropdown box



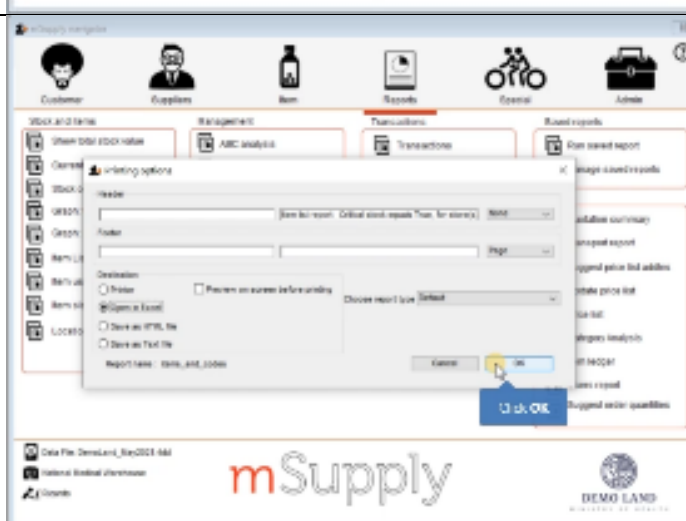
4. Click **OK**



5. Select **Open in Excel**



6. Click **OK**


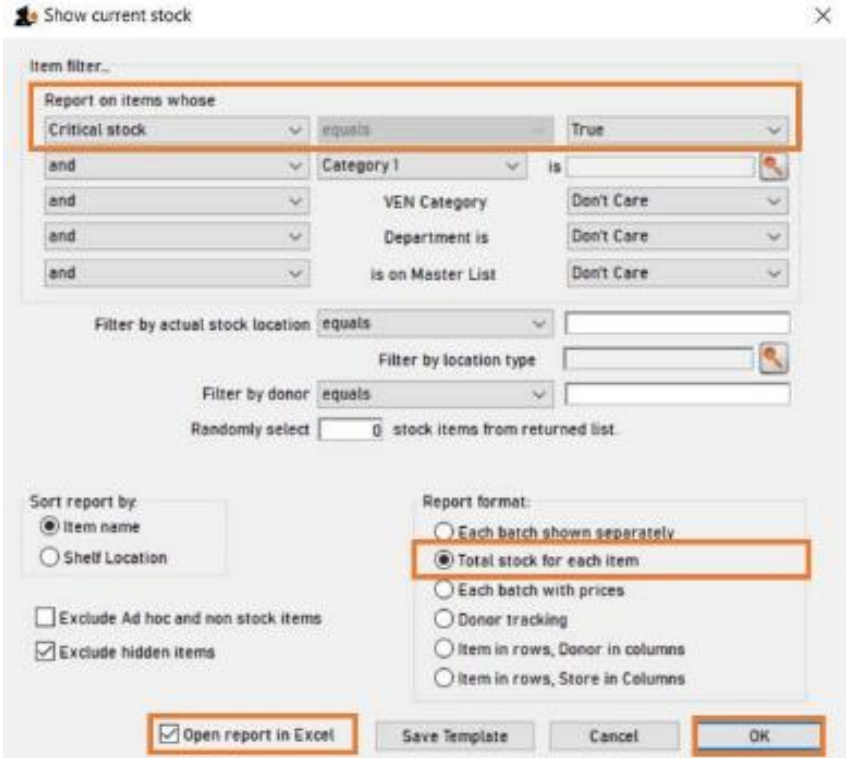
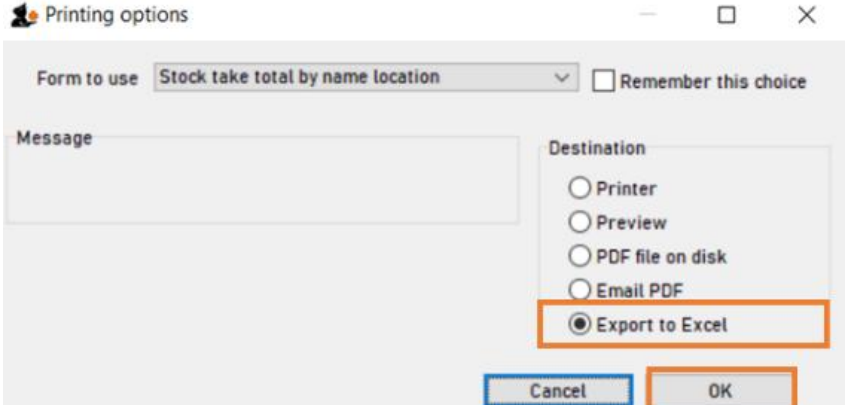


Report opens in Excel:  
**Critical Items List**

	A	B	C	D
1		Item list report: Critical stock equals True, for store(s) National Medical Warehouse		
2				
3	code	item name	Item Location	Stock on hand
4				
5	amo500t	Amoxicillin 500mg tablet	-	1270
6	cefx250i	Ceftriaxone 250mg injection	-	200
7	Enal10	Enalapril 10mg tablet	-	990
8	Etha100	Ethambutol 100mg tab	-	1120
9	Etha400	Ethambutol 400mg tab	-	560
10	ibu200t	Ibuprofen 200mg tab	-	200
11	Iso100	Isoniazid 100mg tab	-	3000
12	Iso300t	Isoniazid 300mg tab	-	300
13	mef250t	Mefloquine 250mg tab	-	0
14	met500t	Metformin 500mg tab	-	2200
15	met500i	Metronidazole 500mg/100mL inj	-	0
16	par500t	Paracetamol 500mg tab	-	4690
17	Pyra500	Pyrazinamide 500mg tab	-	5000
18	ri1is1t	Rifampicin 150mg + isoniazid 150mg tab	-	0
19	ri1is7t	Rifampicin 150mg + isoniazid 75mg tab	-	0
20	ri150t	Rifampicin 150mg cap	-	10000
21				
22				
23				
24				
	Items and codes			
	Ready			
	Count: 16			

**Calculating medicines availability** involves running a Current stock report and then knowing how many items are available in your Basket of Goods.

We can do this for a single store and for multiple stores.

<p><b><u>To generate the Current Stock Report,</u></b></p> <p>1. Navigate to the <b>Reports</b> tab and click <b>Current stock</b></p>	
<p>2. In the first item field, select <b>Critical stock</b>.</p> <p>In the <b>Report format</b> box, select <b>Total stock for each item</b></p> <p>Check <b>Open report in Excel</b> and click <b>OK</b></p>	
<p>3. Select <b>Export to Excel</b> and click <b>OK</b></p>	



- Count the number of critical items

	A	B	C	D
1	<b>Stock totals for each item for store(s) National Medical Warehouse</b>			
2	<b>Location</b>	<b>Item code</b>	<b>Item name</b>	<b>Total quantity</b>
3	ORALS	amo500t	Amoxicillin 500mg tablet	1270
4	INJECTIONS	cef250i	Ceftriaxone 250mg injection	200
5	ORALS	Ena10	Enalapril 10mg tablet	990
6	ORALS	Etha100	Ethambutol 100mg tab	1120
7	ORALS	Etha400	Ethambutol 400mg tab	560
8	ORALS	Ibu200t	Ibuprofen 200mg tab	200
9	ORALS	Iso100	Isoniazid 100mg tab	3000
10	ORALS	Iso300t	Isoniazid 300mg tab	300
11	ORALS	met500t	Metformin 500mg tab	2200
12	ORALS	par500t	Paracetamol 500mg tab	4690
13	ORALS	Pyra500	Pyrazinamide 500mg tab	5000
14	ORALS	rif150t	Rifampicin 150mg cap	10000
15	Stock take total by name locati			

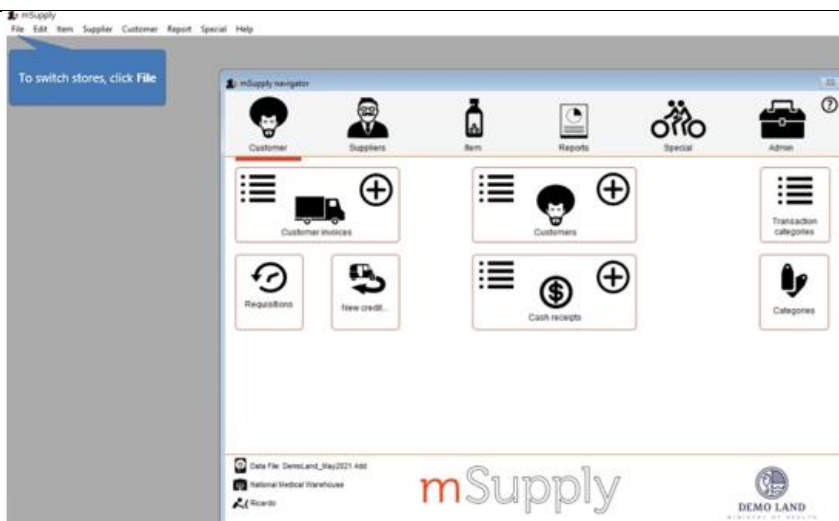
**To calculate medicines availability for a single store,**

$\% \text{ Availability} = \frac{\text{Number of Available critical items}}{\text{Total number of critical items}} \times 100$

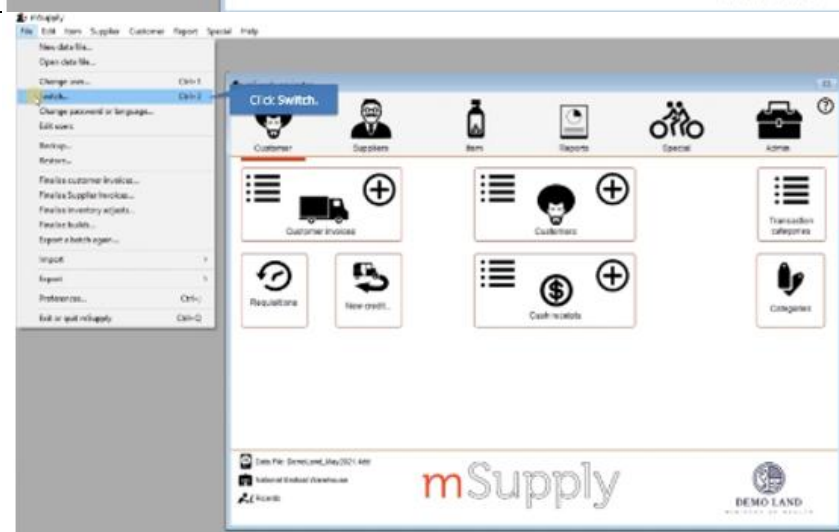
Next, we want to generate a Current stock report across multiple stores. However you need to have access to **Supervisor-all stores**.

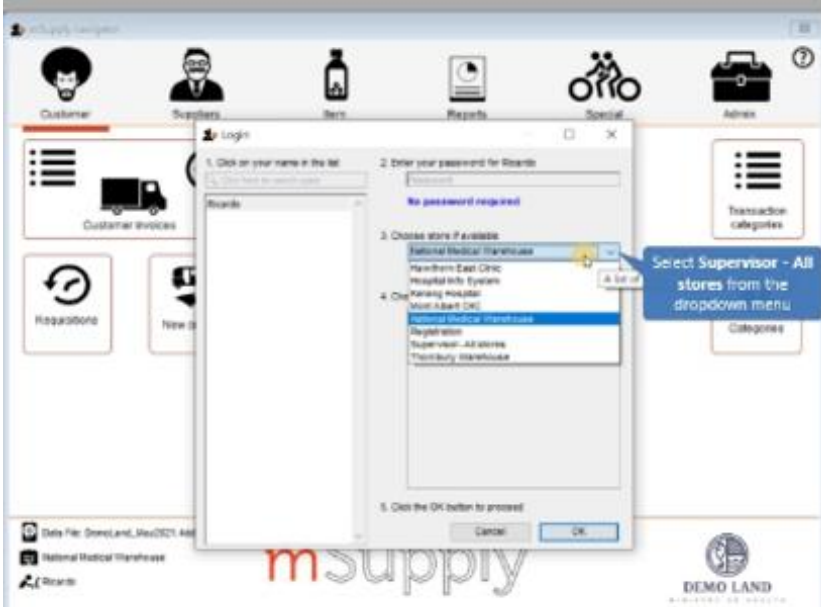


**To switch stores,**

- Click **File**



- Click **Switch**



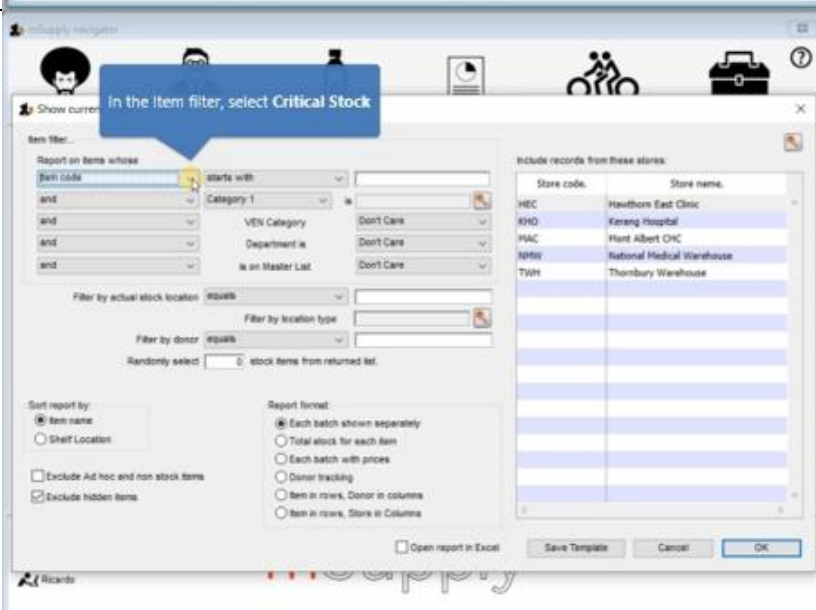
<p>3. Select <b>Supervisor-all stores</b> from the dropdown menu</p>	
<p>4. Click <b>OK</b></p>	
<p>5. Click on the <b>Reports</b> tab</p>	



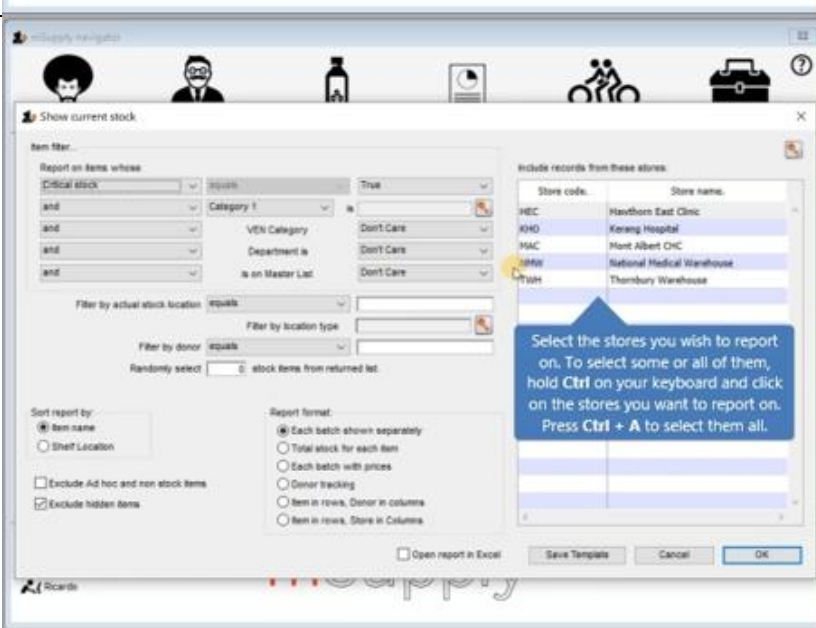
6. Select **Current stock**



7. In the item filter, select **Critical stock**



8. Select the stores you wish to report on. To select some or all of them, hold Ctrl on your keyboard and click on the stores you want to report on. Press Ctrl+A to select them all.



9. For Report format, select **Items in rows, Store in Columns**

10. Click **OK**

11. Report opens in Excel:  
**Current Stock Report and National Medicines Availability**

**You can now calculate National % Medicines Availability**

	A	B	C	D	E	F	G
1	Total stock details for each stores and items for store(s) All Supervisor- All stores						
2							
	Item Code	Item Name	Hawthorn East Clinic	Kerang Hospital	National Medical Warehouse	Thornbury Warehouse	Total
3							
4	iso300t	Isoniazid 300mg tab	0	9600	300	0	9900
5	met500t	Metformin 500mg tab	0	100	2200	0	2300
6	cefx250i	Ceftriaxone 250mg injection	0	10	200	0	210
7	Pyra500	Pyrazinamide 500mg tab	0	0	5000	0	5000
8	Enal10	Enalapril 10mg tablet	0	0	990	0	990
9	ibu200t	Ibuprofen 200mg tab	0	0	200	0	200
10	Iso100	Isoniazid 100mg tab	0	0	3000	0	3000
11	rif150t	Rifampicin 150mg tab/cap	0	5640	10000	0	15640
12	Etha100	Ethambutol 100mg tab	0	0	1120	0	1120
13	met500i	Metronidazole 500mg/100mL inj	0	200	0	0	200
14	amo500t	Amoxicillin 500mg tablet	2000	410	1270	1200	4880
15	par500t	Paracetamol 500mg tab	2990	331	4690	49	8060
16	Etha400	Ethambutol 400mg tab	0	0	560	0	560

## Session 3.11 Basic Reports – Expiring Items

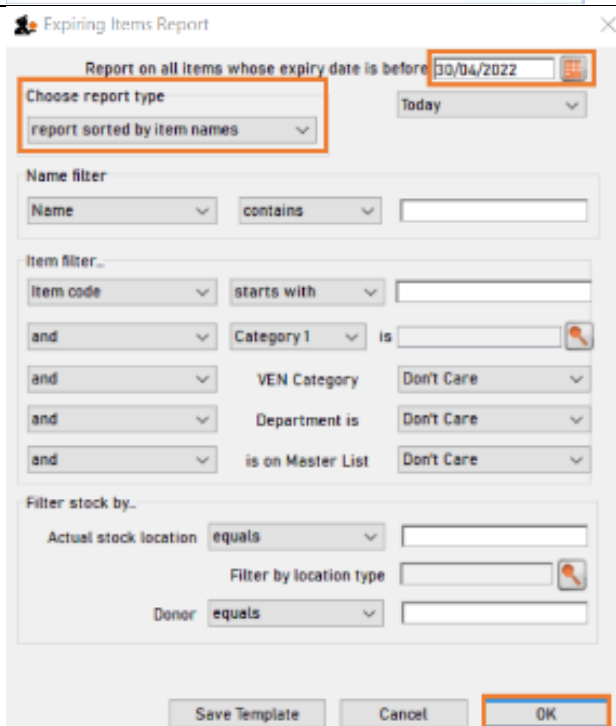
The expiring items report produces a list of items that will expire on or before a specified date. It also lists the quantity and value of stock due to expire in that period.

### To generate an Expiring Items Report,

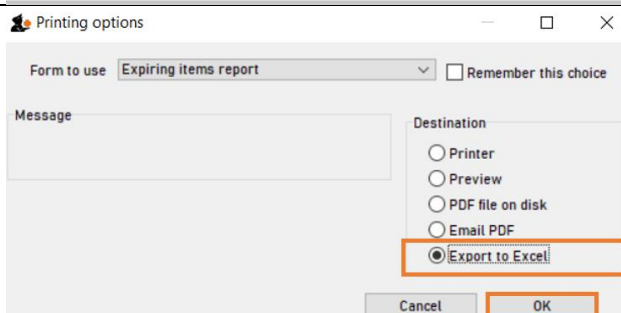
1. Navigate to the **Reports** tab and click on the **Expiring items report**.



2. Enter the **expiry date**  
Choose the **report type**  
Enter any name or item **filters**  
Click **OK**



3. Select **Export to Excel**  
Click **OK**



4. Report opens in Excel:  
**Basic Reports - Expiring  
Items**

	A	B	C	D	E	F	G	H
1	Expiring items - sorted by item name, for store(s) National Medical Warehouse							
2	Item code	Item	Supplier code	Value	Quantity	Pack size	Exp date	Accumulative value
3	amo500t	Amoxicillin 500mg tablet	MON	50	50	1	21/04/2023	50
4	amo500t	Amoxicillin 500mg tablet	ARC	480	4	100	28/02/2023	530
5	amo500t	Amoxicillin 500mg tablet	MON	470	470	1	31/01/2023	1000
6	amo500t	Amoxicillin 500mg tablet	ARC	120	1	100	28/02/2023	1120
7	ibu200t	Ibuprofen 200mg tab	ARC	20	2	100	31/03/2023	1140
8	met500t	Metformin 500mg tab	ARC	300	50	1	31/01/2023	1440

## Session 3.12 Basic Reports - Requisitions

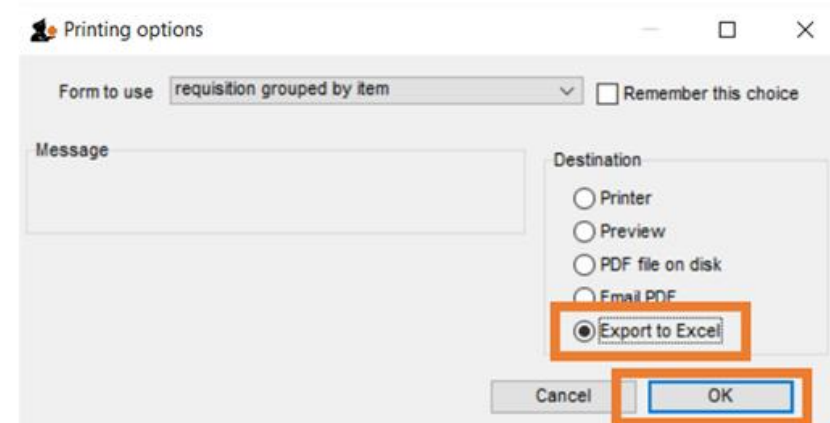
A requisitions report can tell you which customers are still owed stock or outstanding requisitions. This is helpful to ensure customers receive their complete order and to help you assess stock levels when you are placing an order.

### To generate a Requisitions report,

1. Navigate to the **Reports** tab and click on **Requisitions**  
Select **Report type**  
Select **Requisition filter**  
Select **Item filter**  
Select **Requisition customer filter**  
Click **Ok**



2. Select **Export to Excel**, then click **OK**



3. **Requisitions report opens in Excel**

Requisitions grouped by item for requisitions entered from 1/07/2021 to 9/07/2021											
Item name	Our stock on hand	Requisition ID	Customer name	Requisition comment	Status	Type	Requisition Date	Their stock on hand	Quantity Requested	Quantity already issued	To be Supplied
Amoxicillin 500mg tab	1280	21	Kerang Hospital	From request requisition 7	sg	Response (from requisition)	9/07/2021	320	100	0	100
Amoxicillin 500mg tab	1280	22	Mont Albert CHC	From request requisition 1	sg	Response (from requisition)	9/07/2021	0	100	0	100
						Total		320	200	0	200
Metformin 500mg tab	0	21	Kerang Hospital	From request requisition 7	sg	Response (from requisition)	9/07/2021	100	100	0	100
Metformin 500mg tab	0	22	Mont Albert CHC	From request requisition 1	sg	Response (from requisition)	9/07/2021	0	100	0	100
						Total		100	200	0	200
Paracetamol 500mg tab	50	21	Kerang Hospital	From request requisition 7	sg	Response (from requisition)	9/07/2021	330	100	0	100
Paracetamol 500mg tab	50	22	Mont Albert CHC	From request requisition 1	sg	Response (from requisition)	9/07/2021	0	100	0	100
						Total		330	200	0	200

***Legacy Level 4***



## Session 4.1 Suggested Order Quantity Report and Manual Quantification

There are 3 distinct steps required to arrive at suggested order quantities for each line of stock.

- **Forecast future consumption:** mSupply assumes future consumption will match previous consumption rates. You can provide your own forecasts when the need arises though.
- **Calculate required stock quantity:** The amount of stock you require is based on the forecast of future consumption, modified by factors such as Lead time, Ordering cycle, Buffer stock, etc.
- **Calculate purchase order quantity:** Purchase order quantities are based on the amount of stock required, normally expressed as a number of months of AMC.

Before generating the Suggested Order Quantity Report, it is important to **clean up mSupply to make sure it is as accurate as possible**.

1. Delete or finalise **ghost purchase orders** (orders that will never arrive, placed in error or later cancelled).

2. Confirm outstanding customer and supplier invoices.

3. Tidy items list.

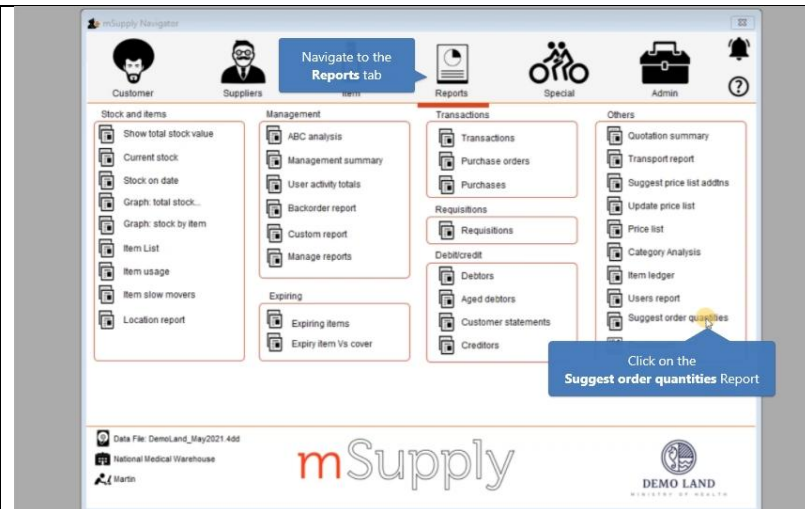
Add any new items to mSupply.  
Identify all items to be ordered as **Normal** stock.



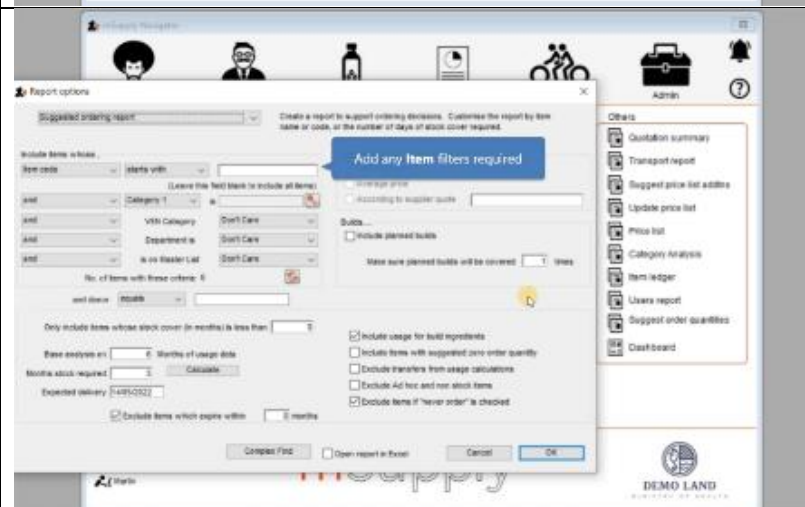
Now, to generate the report,

4. Navigate to the **Reports** tab

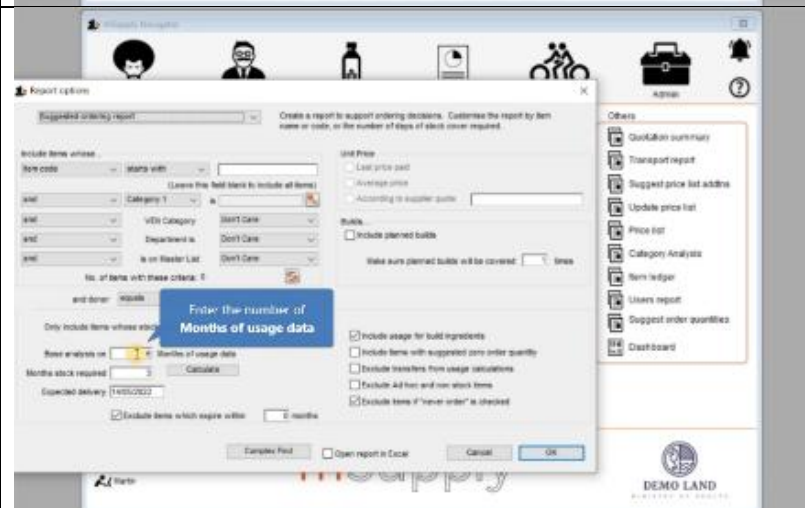
Click on the **Suggest order quantities** report



5. Add any **item** filters required



6. Enter the number of **Months of usage data**



- To determine **Months of stock required**, click on the **Calculate** button

The screenshot shows the 'Report options' dialog box in the mSupply application. The 'Suggested ordering report' is selected. The 'Calculate' button is highlighted with a blue callout box that says 'To determine Months of stock required, click on the Calculate button'.

- Enter the **Lead time**, **Ordering cycle** and **buffer stock**

The screenshot shows the 'Report options' dialog box with the 'Months stock required' sub-dialog open. The sub-dialog has fields for 'Lead time', 'Ordering cycle', and 'with buffer stock'. A blue callout box points to these fields with the text 'Enter the Lead time, Ordering cycle and buffer stock'.

- Click **OK**

The screenshot shows the 'Report options' dialog box with the 'Months stock required' sub-dialog open. The 'OK' button in the sub-dialog is highlighted with a blue callout box that says 'Click OK'.

10. The **Expected delivery date** is automatically calculated from the **Lead time** entered above

The screenshot shows the 'Report options' dialog box in mSupply Navigator. The 'Expected delivery' field is set to '14/07/2022'. A blue callout box points to this field with the text: 'The Expected delivery date is automatically calculated from the Lead time entered above'.

11. If you want to exclude items which expire within a certain number of months, enter the number here

The screenshot shows the 'Report options' dialog box in mSupply Navigator. The 'Exclude items which expire within' checkbox is checked, and the 'Months' field is set to '1'. A blue callout box points to this field with the text: 'If you want to exclude items which expire within a certain number of months, enter the number here'.

12. This report is being run for just one store so ensure the **Exclude transfers from usage calculations** checkbox is unchecked

The screenshot shows the 'Report options' dialog box in mSupply Navigator. The 'Exclude transfers from usage calculations' checkbox is unchecked. A blue callout box points to this checkbox with the text: 'This report is being run for just one store so ensure the Exclude transfers from usage calculations checkbox is unchecked'.

13. Click **OK**

14. Select how you wish to view the report, then click **OK**

15. Report opens in Excel:  
**Suggested Ordering Report**

**Suggested Ordering Report: Months cover : 15 months. Based on last 6 months usage data.**

Page 1 of 1

Item Code	Item Name	VEN	Item category	Stock on hand	Back order	12 months average	24 months average	Monthly usage for the last 6 months	Months Cover	Quantity on Order	Ordered quantity in use	Suggested order used	Forecast
Iso100	Isoniazid 100mg			0	0	250	125	500	0	0	0	6492	N
iso300t	Isoniazid 300mg			0	0	8	4	16	0	0	0	216	N

**You may need to perform Manual Quantification sometimes, such as when a new item is being ordered and there is no historical data.**

Some methods include:

**Time period sub-sets:** Here you find a consecutive series of months where the item was in stock and usage appeared to be normal.

**Local epidemiology:** Here you can work out how much stock is required by knowing the incidence or prevalence of a particular disease and by estimating the % of patients who will need this agent.

**Similar products that are being replaced:** Here you can work out the equivalent dose and use this to figure out how much stock is required.

**Similar countries:** You can ask a similar country for their usage for a particular item and adjust it to the second country's population.

**Departmental liaison:** Here you can speak to the people who will be using a particular product and they should be able to give a reasonable idea of how many patients may need it and therefore how much to order.

## **Session 4.2 Introduction to the Tender Module**

Publishing a tender allows a one seek the best prices for medicines and consumables that will be required and achieve the best value for available funds over a given period of time.

Normally the full tender process creates a lot of work which can be very time-consuming and error-prone. The mSupply Tender Module is designed to simplify this process, minimise the work involved and to reduce the chance of errors.

- Time-savings and increased accuracy  
Suppliers can enter their own bids into the system, reducing the risk of transcription error. You do not need to consolidate multiple bids and re-enter the information into a busy spreadsheet.
- Cost-savings  
The Tender Module facilitates easy line-by-line evaluation of bids. It will adjust prices in different currencies across different pack sizes from multiple bidders so that you don't have to do it manually. There can be greater cost savings using this approach than awarding an entire tender to the lowest bidder overall.
- Transparency and data security  
Once the tender is published using the Remote Tender Module, no one else can edit the tender. Once the bids have been submitted and the bidding period is closed, no one can edit the supplier's responses.

The overall workflow of the Tender Module

- Prepare a list of items and quantities
- Add standard tender conditions
- Distribute tender to suppliers
- Evaluate received quotations and select preferred suppliers
- Notify suppliers of winning bids
- Create purchase orders



## Session 4.3 Create a New Manual Tender

There are 2 ways to create a new tender using mSupply.

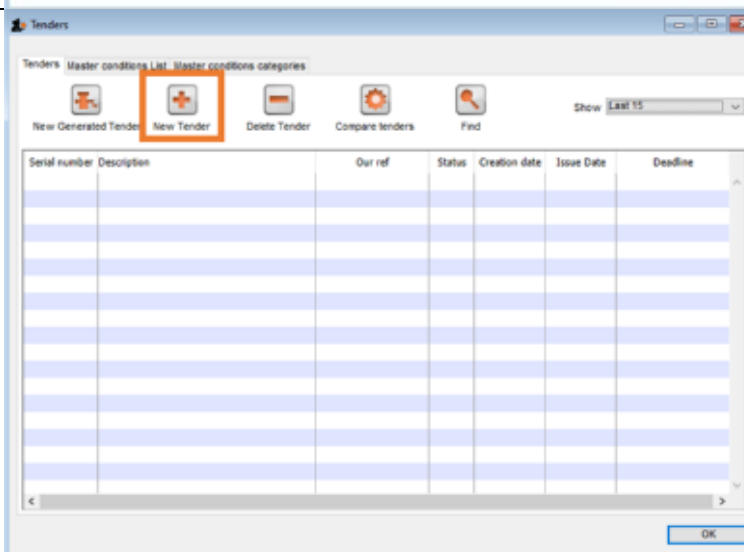
- Manually: This method allows you create the tender by adding each item manually.
- Automatically: Once you have run mSupply for a year, mSupply can suggest items and quantities based on actual usage. The quantities are suggested and can be amended as required.

### To create a manual tender,

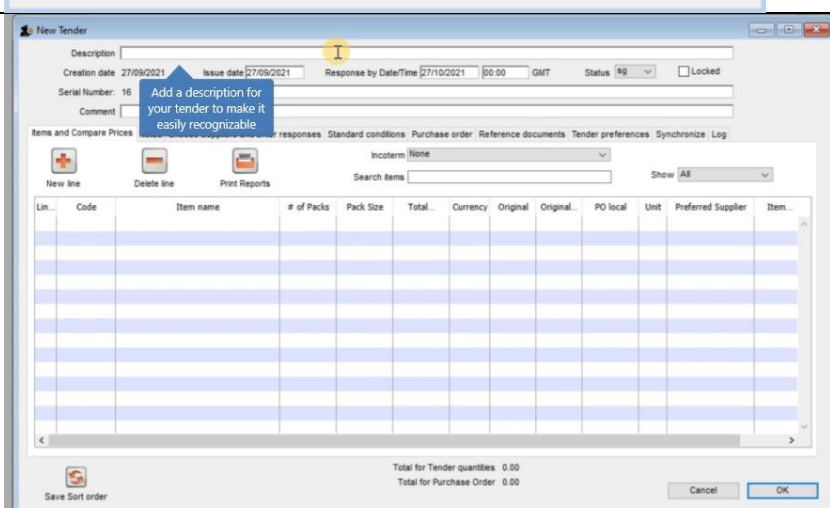
1. Navigate to the **Suppliers** tab and click the **Tenders** button.



2. Click on **New Tender**



3. Add a description for your tender to make it easily recognizable



4. Add a reference code or number to help identify tender-specific correspondence

The screenshot shows the 'New Tender' form. At the top, there are fields for 'Description' (Annual tender Demoland 2022), 'Creation date' (27/09/2021), 'Issue date' (27/09/2021), 'Response by Date/Time' (27/10/2021 00:00 GMT), 'Status' (NE), and a 'Locked' checkbox. Below these is the 'Serial Number' (16) and 'Our reference' (DL2022). A blue callout box points to the 'Our reference' field with the text: 'Add a reference code or number here to help identify tender-specific correspondence'. Below the reference fields are tabs for 'Items and Compare Prices', 'Notes', 'Choose Suppliers and Enter responses', 'Standard conditions', 'Purchase order', 'Reference documents', 'Tender preferences', 'Synchronise', and 'Log'. The 'Items and Compare Prices' tab is active, showing a table with columns: 'Lin.', 'Code', 'Item name', '# of Packs', 'Pack Size', 'Total...', 'Currency', 'Original', 'Original', 'PO local', 'Unit', 'Preferred Supplier', and 'Item...'. The table is currently empty. At the bottom, there are 'Save' and 'Start order' buttons, and a status bar showing 'Total for Tender quantities: 0.00' and 'Total for Purchase Order: 0.00'.

5. Check the **Locked** checkbox to ensure the tender cannot be accidentally deleted.

This screenshot is identical to the previous one, but the 'Locked' checkbox is now checked. A blue callout box points to the 'Locked' checkbox with the text: 'Check the Locked checkbox to ensure this tender cannot be accidentally deleted'.

6. Select the relevant **incoterm** for your tender.

This screenshot shows the 'New Tender' form with the 'Incoterm' dropdown menu open. The dropdown list includes: 'Incoterm: Name', 'Search items', 'FCA (Free Carrier)', 'CPT (Carriage Paid To)', 'CIP (Carriage and Insurance Paid to)', 'DAT (Delivered at Terminal)', 'DAP (Delivered at Place)', 'DDP (Delivered Duty Paid)', 'FAS (Free Alongside Ship)', 'FOB (Free on Board)', 'CFR (Cost and Freight)', and 'CIF (Cost, Insurance and Freight)'. A blue callout box points to the dropdown with the text: 'Select the relevant Incoterm for your tender.' The 'Locked' checkbox remains checked.



- Click **New Line** to add your first item (or subsequent items from this screen)

- Enter the **Item Name** here. As always you can search by typing a few letters or @ followed by **tab**

- Enter the **Number of Packs** here

10. Enter the **pack size** here

Item Name: Amoxicillin 500mg tablet  
Description: 500mg tablets, pack size 20  
Original Generated quantity: 0

Set tender item criteria: Compare supplier responses: Purchase order

Number of Units: 100  
Multiplied by pack size: 500  
Estimated price: 0.00  
+ total quantity: 0

Comment:   
Conditions:

Round Quantities: OK & Next Cancel OK

11. mSupply will calculate the total quantity of individual tablets you are putting out to tender.

Item Name: Amoxicillin 500mg tablet  
Description: 500mg tablets, pack size 20  
Original Generated quantity: 50000

Set tender item criteria: Compare supplier responses: Purchase order

Number of Units: 100  
Multiplied by pack size: 500  
Estimated price: 0.00  
+ total quantity: 50000

Comment:   
Conditions:

Round Quantities: OK & Next Cancel OK

12. You may change the colour of each item if you wish, for later reference.

Item Name: Amoxicillin 500mg tablet  
Description: 500mg tablets, pack size 20  
Original Generated quantity: 50000

Set tender item criteria: Compare supplier responses: Purchase order

Number of Units: 100  
Multiplied by pack size: 500  
Estimated price: 0.00  
+ total quantity: 50000

Comment:   
Conditions:

Round Quantities: OK & Next Cancel OK

13. This is an internal **Comment** section you can use to make item-specific comments. Suppliers will not see this.

Item Name: Amoxicillin 500mg tablet  
Description: 500mg tablets, pack size 20  
Original Generated quantity: 50000

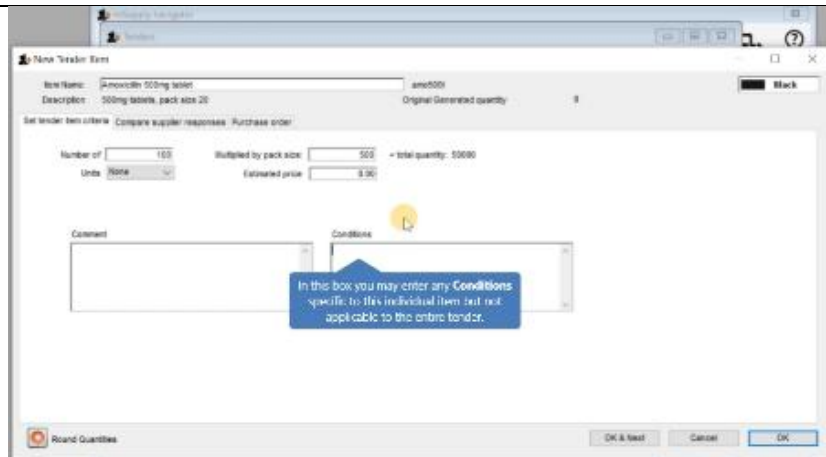
Set tender item criteria: Compare supplier responses: Purchase order

Number of Units: 100  
Multiplied by pack size: 500  
Estimated price: 0.00  
+ total quantity: 50000

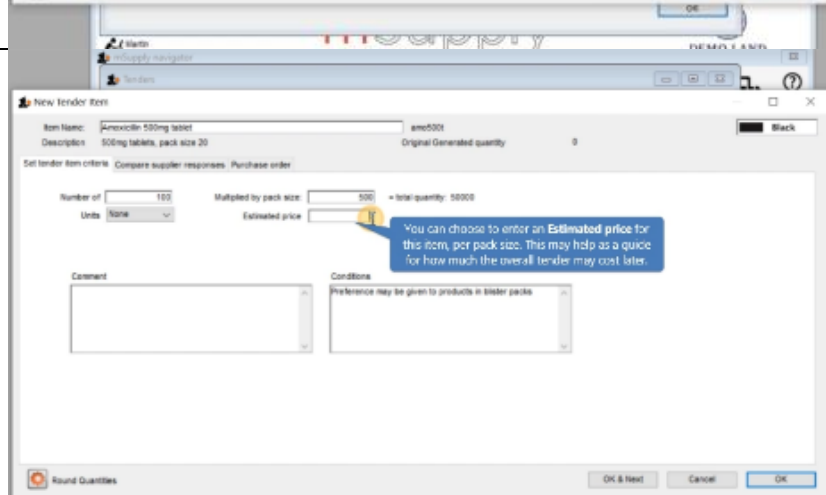
Comment:   
Conditions:

Round Quantities: OK & Next Cancel OK

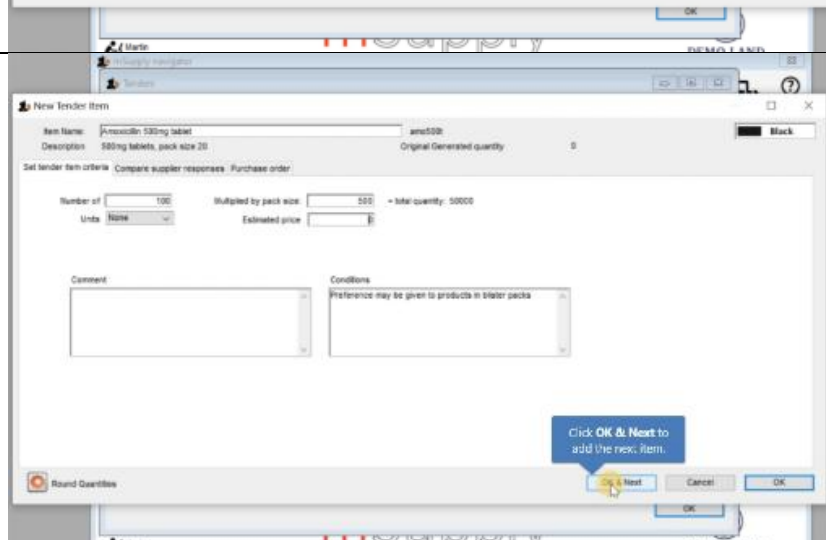
14. In this box you may enter any **Conditions** specific to the individual item but not applicable to the entire tender.



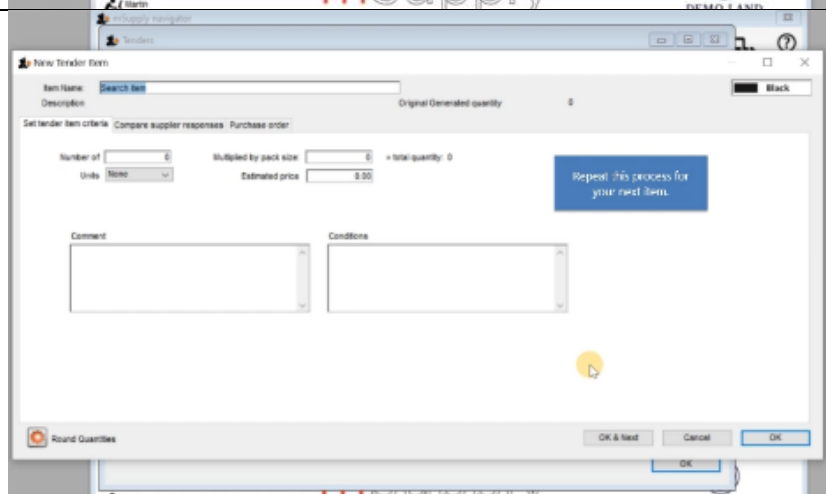
15. You can choose to enter an **Estimated price** for this item, per pack size. This may help as a guide for how much the overall tender may cost later.



16. Click **OK & Next** to add the next item.



17. Repeat the process for your next item



18. When you are finished and don't want to add any more items, click **OK**

**Done!**

LT.	Code	Item name	# of Packs	Pack Size	Total	Currency	Original	Original	PO local	Unit	Preferred Supplier	Item...
1	amc0008	Amoxicillin 500mg tablet	100	500	50000	0.00	0.00	0.00	0.00	No bids	Preferenc	
2	cefz250i	Ceftriaxone 250mg injection	20	10	200	0.00	0.00	0.00	0.00	No bids	Preferenc	

Total for Tender quantities: 0.00  
Total for Purchase Order: 0.00

**To review, edit and delete tenders,**

1. Navigate to the **Suppliers** tab and click **Tenders**



- The **Tenders** window will open and show the **Last 15** tenders by default.

Double click any you wish to open.

Serial number	Description	Our ref	Status	Creation date	Issue Date	Deadline
16	Annual tender DemoLand 2022	DL2022-01	sq	27/09/2021	27/09/2021	27/10/2021

- You may use other filters to view tenders meeting certain requirements from the **Show** dropdown menu

- The tender will appear in the **Edit Tender** window. **Double click** on the selected item to view or edit a line. You can use the **Search items** field to search for an item.

Lin.	Code	Item name	# of Packs	Pack Size	Total	Currency	Original	Original.	PO local	Unit	Preferred Supplier	Item..
1	amox500r	Amoxicillin 500mg tablet	100	500	50000	0.00	0.00	0.00	0.00	No bids	Preference	

- Edit any of the fields you need to. Click **OK**

The tender has been updated with the new quantity!

Annual tender DemoLand 2022

Creation date: 27/09/2021 Issue date: 27/09/2021 Response by Date/Time: 27/10/2021 00:00 GMT Status: RQ Locked

Serial Number: 16 Our reference: DL2022-01

Comment:

Items and Compare Prices Notes Choose Suppliers and Enter responses Standard conditions Purchase order Reference documents Tender preferences Synchronize Log

New line Delete line Print Reports Search items Show All

Ln...	Code	Item name	# of Packs	Pack Size	Total...	Currency	Original	Original...	PO local	Unit	Preferred Supplier	Item...
1	amv500i	Amoxicillin 500mg tablet	100	500	50000	0.00	0.00	0.00	0.00	No bids	Preferenc...	
2	cefaz250i	Ceftriaxone 250mg injection	40	10	400	0.00	0.00	0.00	0.00	No bids	Preferenc...	

Total for Tender quantities: 0.00  
Total for Purchase Order: 0.00

Save Sort order Cancel OK

### To delete a tender item,

Select the item and click **Delete Line**

Click **Delete** when prompted.

Ensure the **Locked** checkbox is unchecked for you to delete anything.

Annual tender DemoLand 2022

Creation date: 27/09/2021 Issue date: 27/09/2021 Response by Date/Time: 27/10/2021 00:00 GMT Status: RQ Locked

Serial Number: 16 Our reference: DL2022-01

Comment:

Items and Compare Prices Notes Choose Suppliers and Enter responses Standard conditions Purchase order Reference documents Tender preferences Synchronize Log

New line Delete line Print Reports Search items Show All

Ln...	Code	Item name	# of Packs	Pack Size	Total...	Currency	Original	Original...	PO local	Unit	Preferred Supplier	Item...
1	amv500i	Amoxicillin 500mg tablet	100	500	50000	0.00	0.00	0.00	0.00	No bids	Preferenc...	
2	cefaz250i	Ceftriaxone 250mg injection	40	10	400	0.00	0.00	0.00	0.00	No bids	Preferenc...	

Delete lines...  
The following lines are to be deleted:  
Ceftriaxone 250mg injection  
Are you sure you want to delete?  
Delete Cancel

Total for Tender quantities: 0.00  
Total for Purchase Order: 0.00

Save Sort order Cancel OK

The item has been removed from the tender.

Annual tender DemoLand 2022

Creation date: 27/09/2021 Issue date: 27/09/2021 Response by Date/Time: 27/10/2021 00:00 GMT Status: RQ Locked

Serial Number: 16 Our reference: DL2022-01

Comment:

Items and Compare Prices Notes Choose Suppliers and Enter responses Standard conditions Purchase order Reference documents Tender preferences Synchronize Log

New line Delete line Print Reports Search items Show All

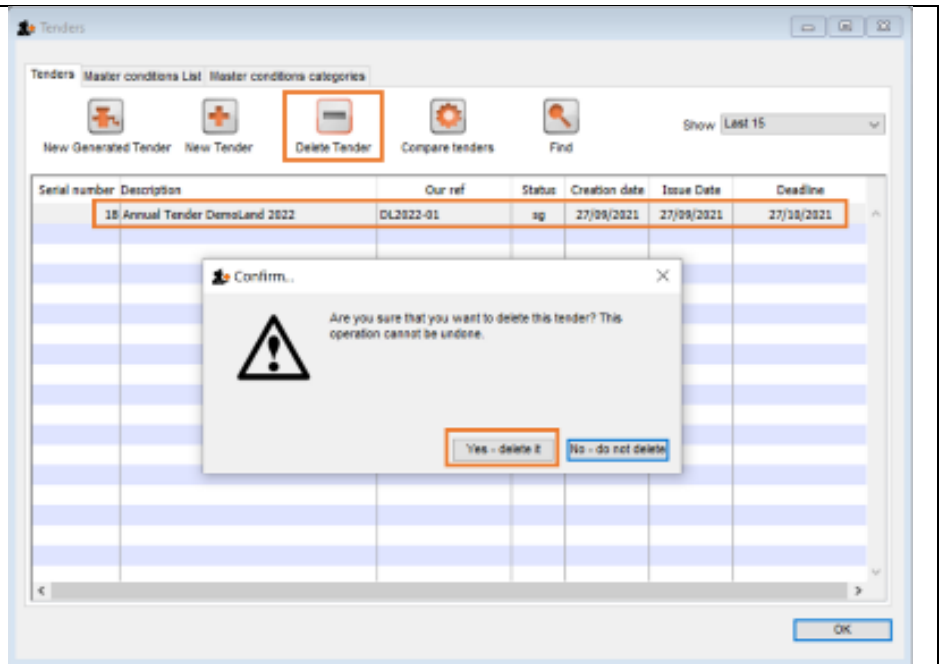
Ln...	Code	Item name	# of Packs	Pack Size	Total...	Currency	Original	Original...	PO local	Unit	Preferred Supplier	Item...
1	amv500i	Amoxicillin 500mg tablet	100	500	50000	0.00	0.00	0.00	0.00	No bids	Preferenc...	

Total for Tender quantities: 0.00  
Total for Purchase Order: 0.00

Save Sort order Cancel OK

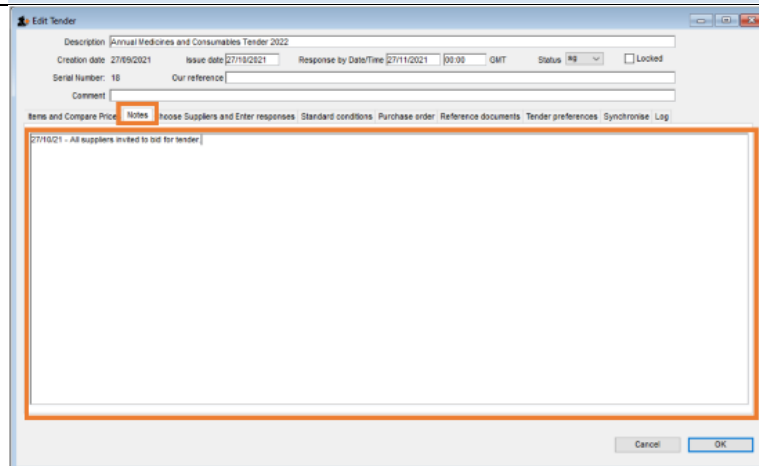
### To delete an entire tender,

You can do so from the **Tenders** window. Click on the tender you want to delete, click **Delete Tender** and **Confirm** when prompted. Again, this is only possible when the **Locked** checkbox is unchecked.



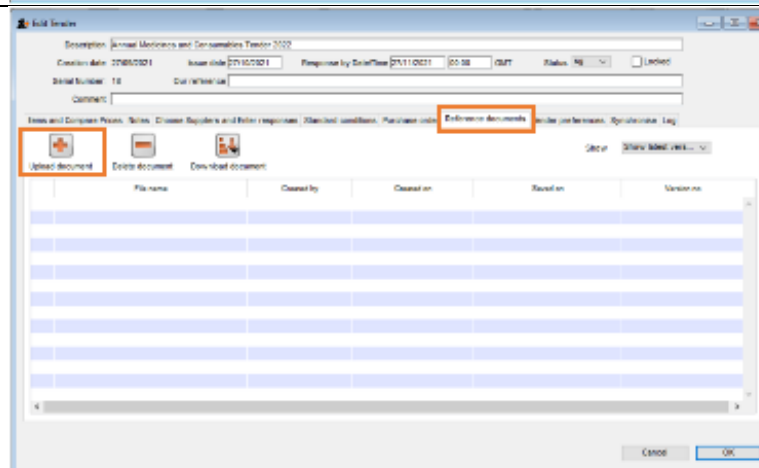
### To add general notes,

Navigate to the **Notes** tab and enter the notes you want.



### To add a general reference document,

You do this under the **Reference documents** tab. Click on **Upload document** then follow the prompts.



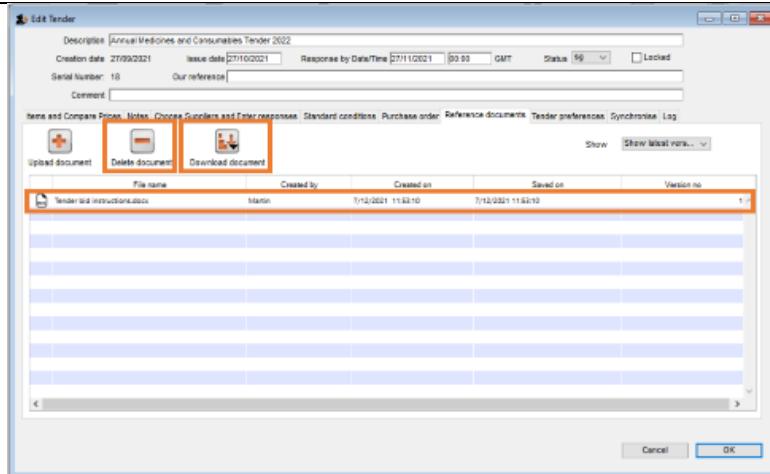


**To view a document,**

You need to download it.  
Select the document and click **Download document** and follow prompts.

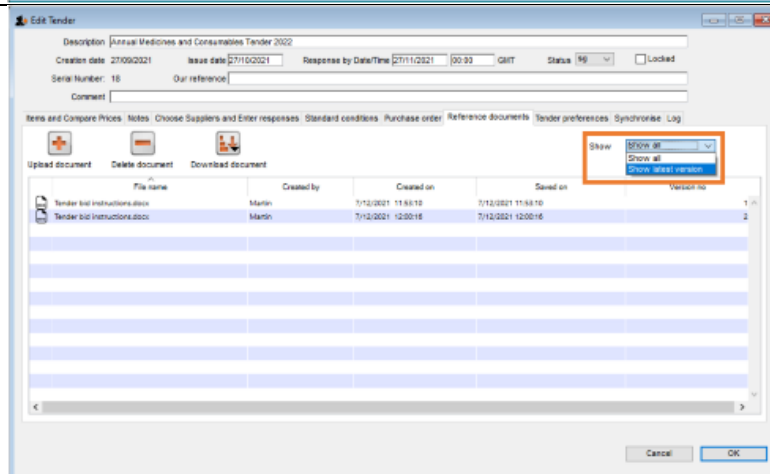
**To delete a document,**

Select it and click **Delete document** and when prompted, **Confirm** you want to delete it.



**To filter multiple versions of documents,**

Click **Show latest version** from the **Show** dropdown menu.



## Session 4.4 Create a New Generated Tender

mSupply can automatically create a suggested tender based upon your previous usage and projected demand.

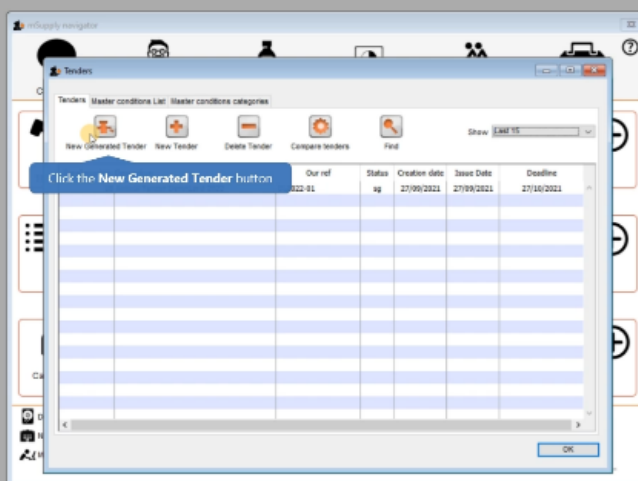
1. Click on the **Suppliers** tab



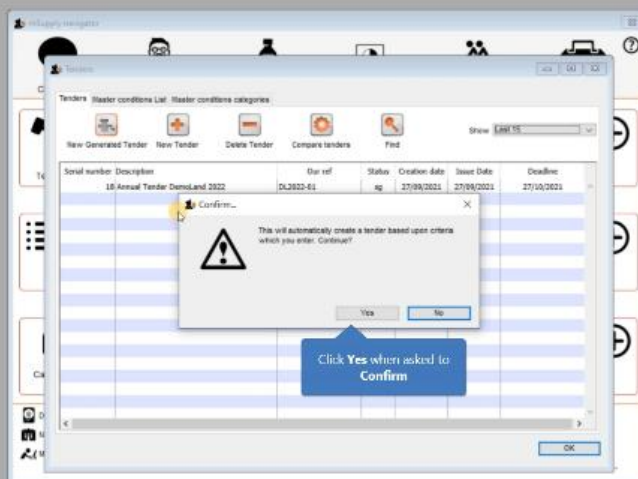
2. Click on the **Tenders** button



3. Click the **New Generated Tender** button



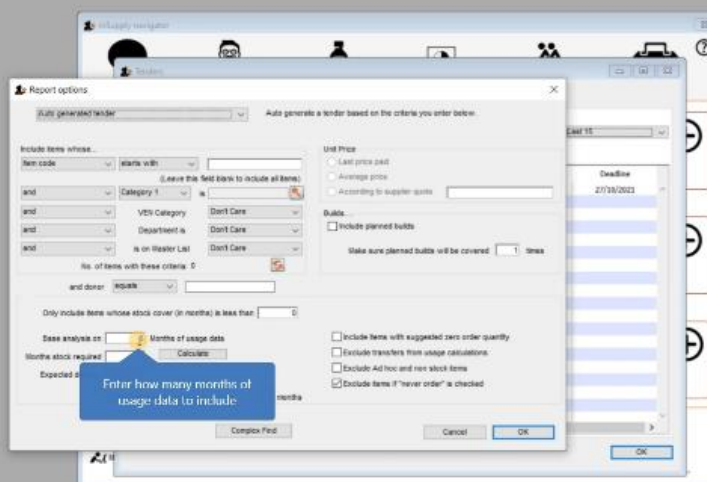
4. Click **Yes** when asked to **Confirm**



5. Apply any **item filters** here



6. Enter how many months of usage data to include



7. Click **Calculate**

8. Enter the **Lead time**, **Ordering cycle** and **buffer stock**. mSupply will then calculate your **Months of stock required**.

9. Click **OK**

10. The **Expected delivery** field is automatically added from your **lead time**

The screenshot shows the 'Report options' dialog box. A blue callout box points to the 'Expected delivery' field, which is set to '25/12/2021'. The text inside the callout says: 'The Expected delivery field is automatically updated from your lead time.'

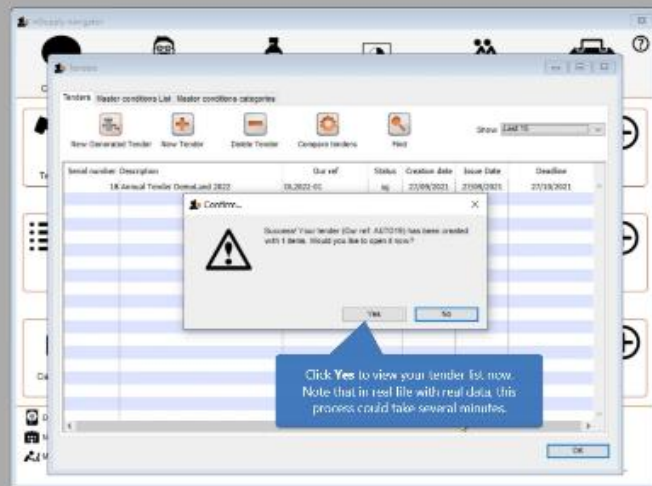
11. Ensure the **Exclude transfers from usage calculations** checkbox is **NOT** ticked

The screenshot shows the 'Report options' dialog box. A blue callout box points to the 'Exclude transfers from usage calculations' checkbox, which is unchecked. The text inside the callout says: 'Ensure the Exclude transfers from usage calculations checkbox is NOT ticked.'

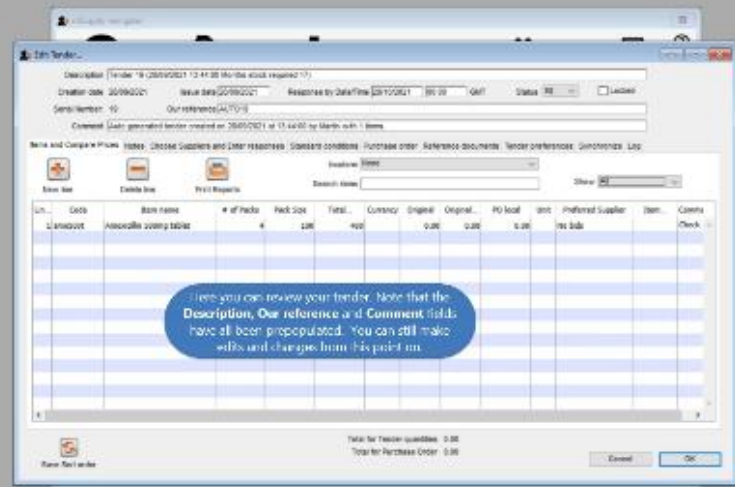
12. Click **OK**

The screenshot shows the 'Report options' dialog box. A blue callout box points to the 'OK' button at the bottom right. The text inside the callout says: 'Click OK.'

13. Click **Yes** to view your tender list now. Note that in real life, this process could take several minutes.



14. Here you can review your tender. Note that the **Description**, **Our reference** and **Comment** fields have all been prepopulated. You can still make edits and changes from this point on.



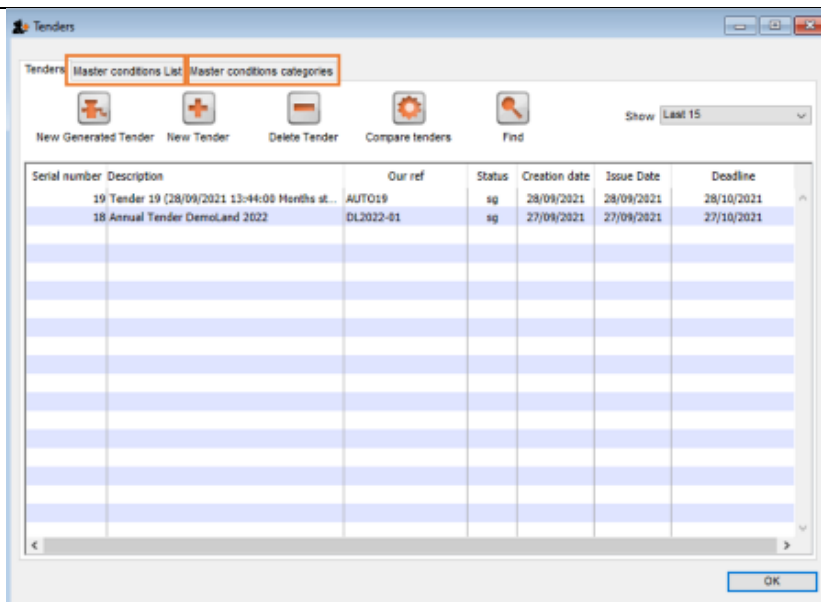
## Session 4.5 Set Standard Tender Conditions

Tenders are usually issued with a list of standard conditions. These broadly define how the tender will work, including submission instructions, closing date, notification of successful bids, terms of payment and many more. You can add these individually to each tender but mSupply also allows you to create Master Lists of tender conditions which can be entered once and then applied to all future tenders.

1. Navigate to the **Suppliers** tab and click on **Tenders**.

**Master conditions list:** this tab allows you to input your tender conditions.

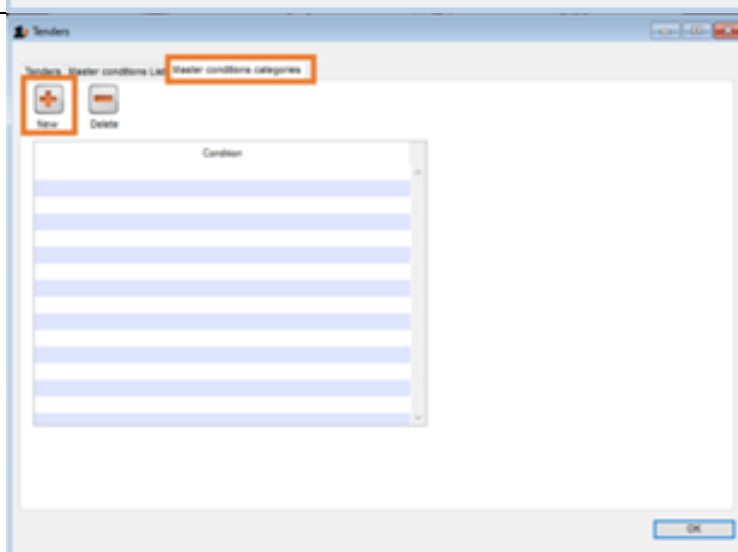
**Master conditions categories:** this tab allows you categorize your tender conditions if you wish.



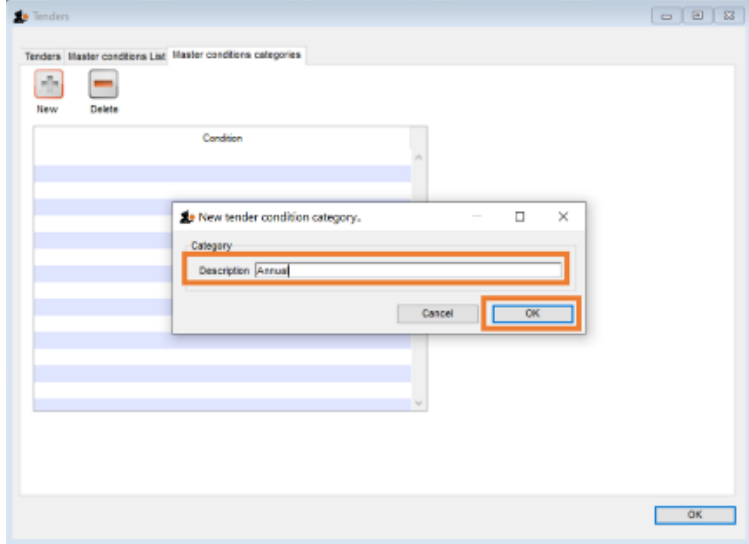
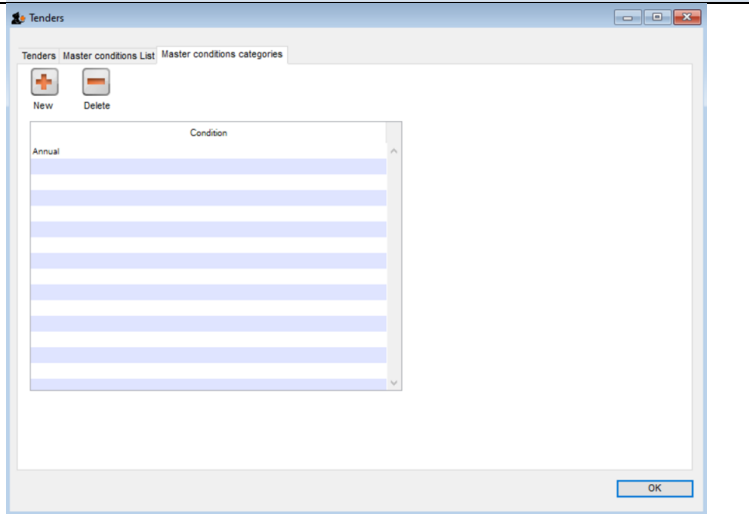
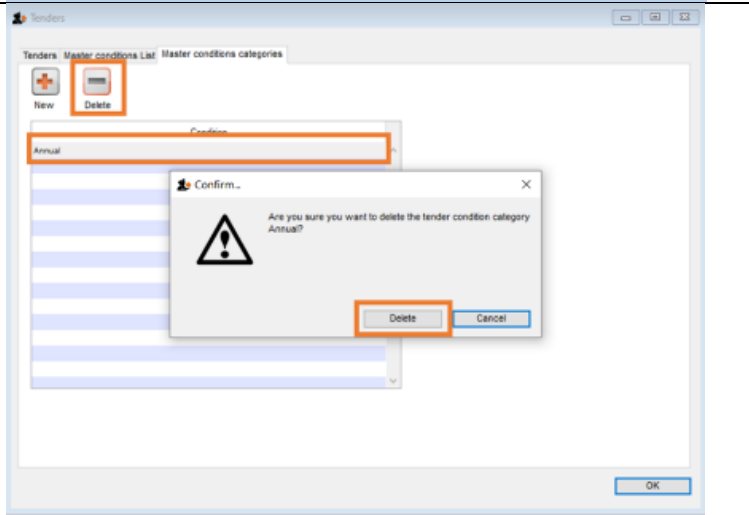
2. If you wish to use Master conditions categories, it is best to create them first so you can apply them to your conditions list later.

Click on the **Master conditions categories** tab

**To add a category**, click **New**.





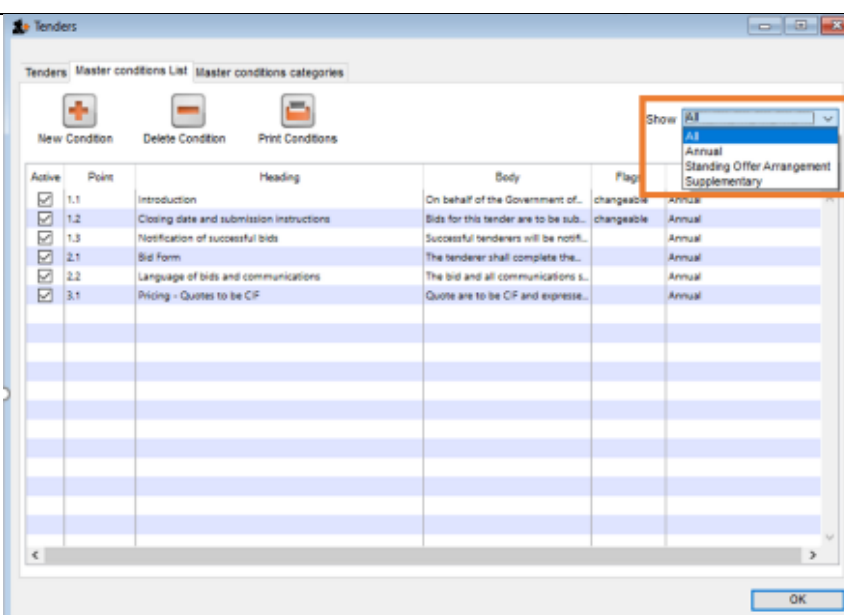
<p>3. Enter your new category in the <b>Description</b> field, then click <b>OK</b></p>	
<p>4. <b>Your new category is now listed!</b></p> <p>Repeat the process to add new categories as required.</p>	
<p>5. <b><u>To delete a category,</u></b></p> <p>Select it from the list, click <b>Delete</b> and <b>Confirm</b> when prompted.</p> <p>You can only delete a category when no conditions are associated with it.</p>	
<p>6. <b><u>To add a new master condition, go to the New Master conditions window..</u></b></p> <p><b>Point:</b> The conditions will be sorted by their point entry when printed.</p> <p><b>Active:</b> This is automatically checked which means you will be able to add this condition to a tender.</p> <p><b>Print</b> Heading and Body: This dropdown allows you to select what to print.</p> <p><b>Heading:</b> Enter the heading.</p> <p><b>Body:</b> Enter the conditions.</p> <p><b>Category:</b> If you have defined categories, they will be displayed in the dropdown list and you may select the appropriate one.</p> <p><b>Flag:</b> You can use this field to identify particular entries.</p>	

When you have finished, click **OK & Next** to add another condition or click **OK** to return to the Master Conditions List window.

### 7. To view or edit your conditions,

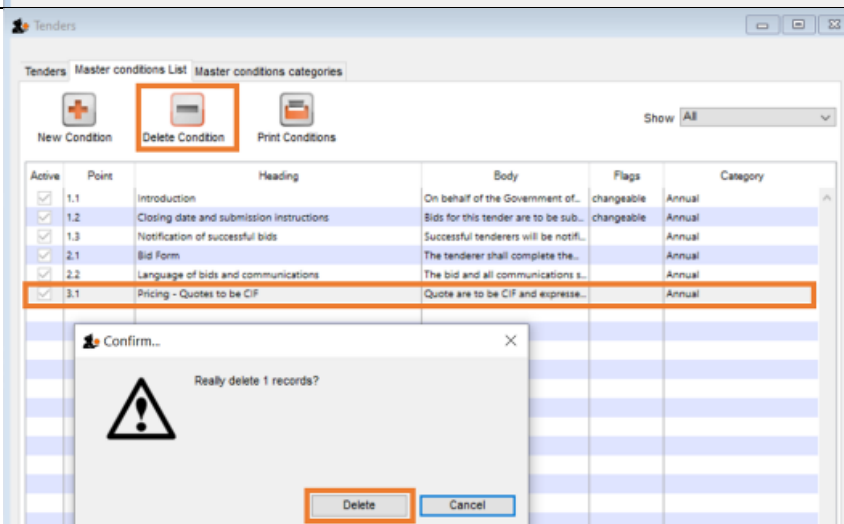
From the **Show** dropdown menu you can to view all conditions or those belonging to a particular category.

Double click a condition to edit.



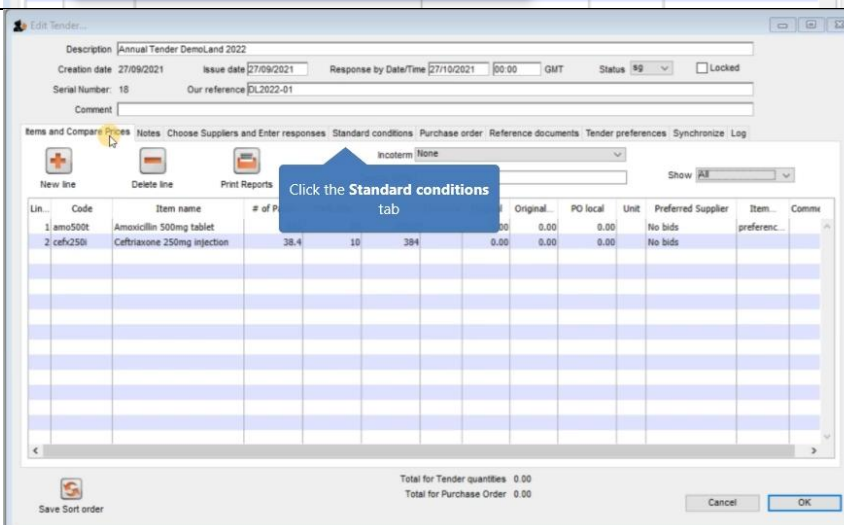
### 8. To delete a condition,

Select it from the list and click **Delete Condition** and click **Delete** when asked to confirm.

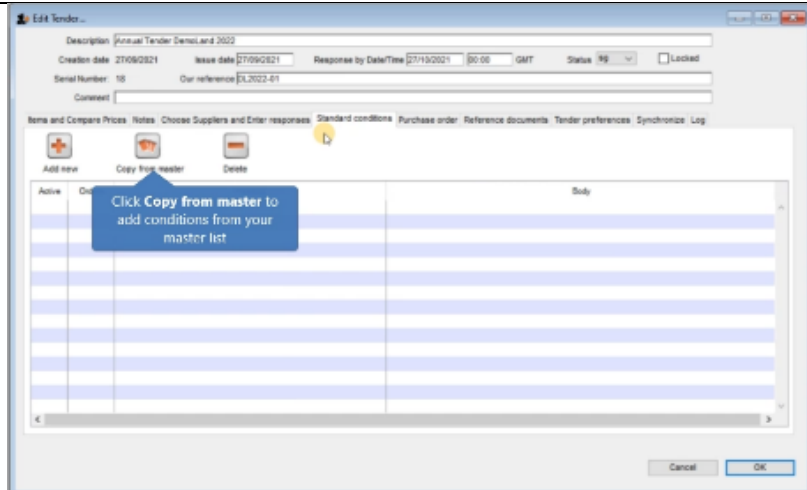


### 9. To add conditions, lists, categories to a tender,

Click the **Standard conditions** tab

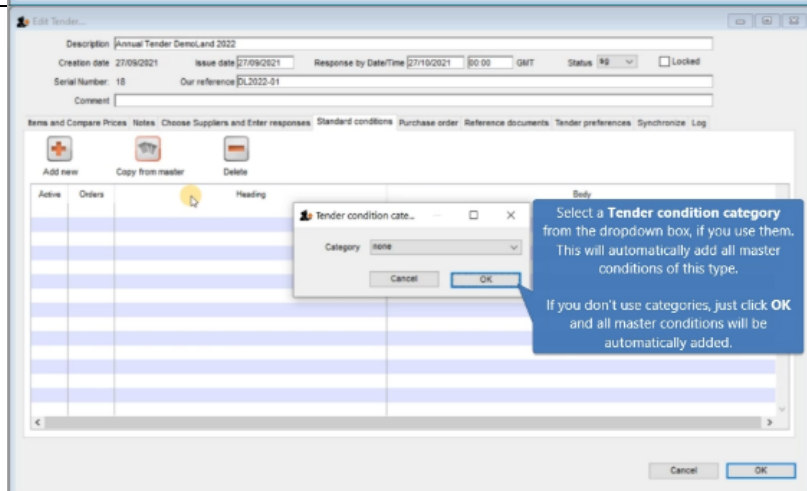


10. Click **Copy from master** to add conditions from your master list.

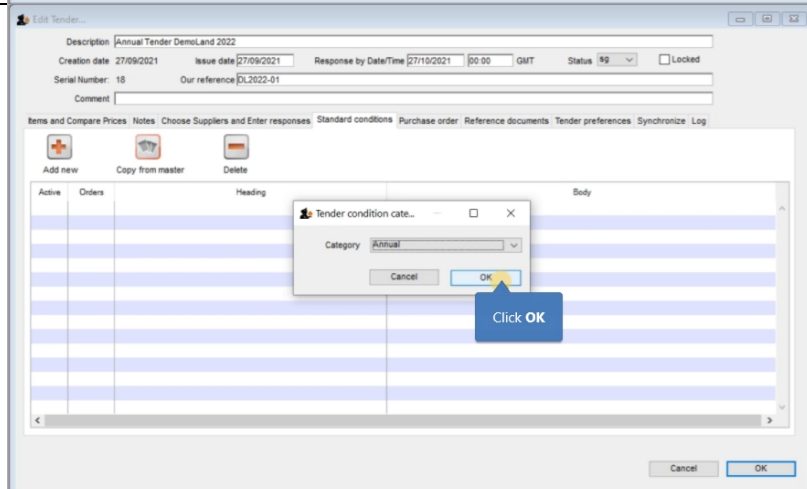


11. Select a **Tender conditions category** from the dropdown box, if you use them. This will automatically add all master conditions of this type.

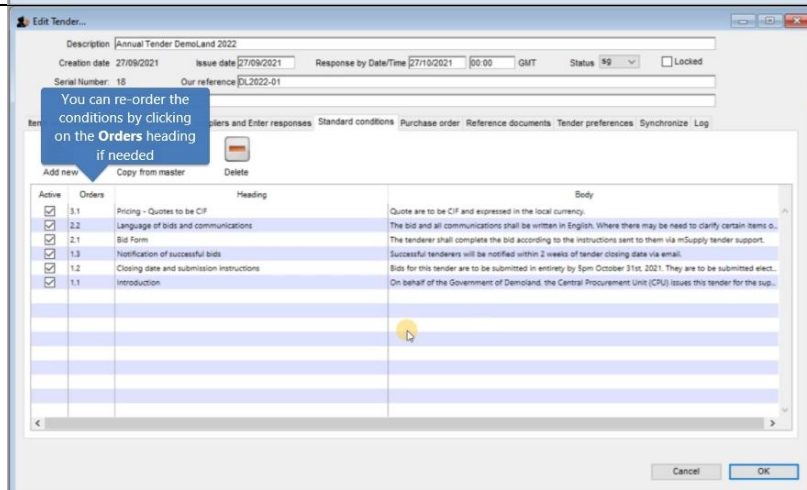
If you don't use categories, just click **OK** and all master conditions will be automatically added.



12. Click **OK**



13. You can reorder the conditions by clicking on the **Orders** heading if needed.



14. **To view or edit a condition, double click it**

The screenshot shows the 'Edit Tender' window for 'Annual Tender DemoLand 2022'. It includes fields for Creation date (27/09/2021), Issue date (27/09/2021), Response by Date/Time (27/10/2021 00:00 GMT), Status (99), and a Locked checkbox. Below these are tabs for 'Items and Compare Prices', 'Notes', 'Choose Suppliers and Enter responses', 'Standard conditions', 'Purchase order', 'Reference documents', 'Tender preferences', 'Synchronize', and 'Log'. A table lists conditions with columns for 'Active', 'Orders', 'Heading', and 'Body'. Line 1.1 'Introduction' is selected. A blue callout bubble points to line 1.1 with the text: 'To view or edit a condition, double-click it'.

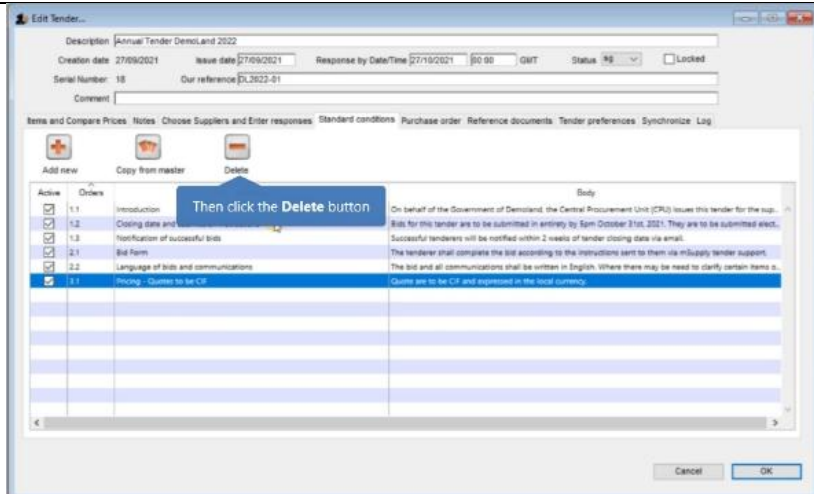
15. When you are finished viewing or editing, click **OK**

This screenshot shows the 'Edit Tender condition' dialog box overlaid on the 'Edit Tender' window. The dialog has fields for 'Point' (1.1), 'Active' checkbox, 'Print heading and body' dropdown, 'Heading' (Introduction), and 'Body' (On behalf of the Government of Demoland, the Central Procurement Unit (CPU) issues this tender for the supply of Medicines and Consumables to Demoland for the year 2022). It also has 'Category' (Annual) and 'Flags' (changeable) dropdowns. At the bottom are 'Cancel', 'OK', and 'OK & Next' buttons. A blue callout bubble points to the 'OK' button with the text: 'When you are finished viewing or editing, click OK'.

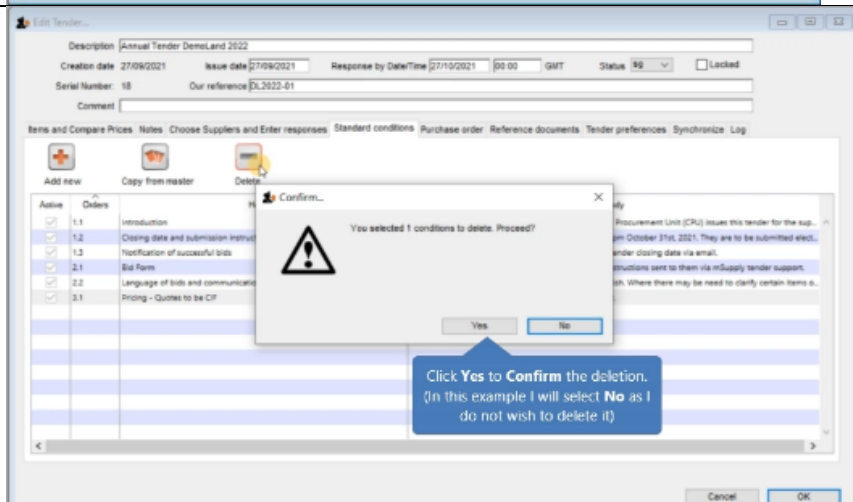
16. If you wish to delete a condition from the tender, select the line with a single click.

This screenshot shows the 'Edit Tender' window with the same condition list as before. A blue callout bubble points to line 1.1 'Introduction' with the text: 'If you wish to delete a condition from this tender, select the line with a single click'.

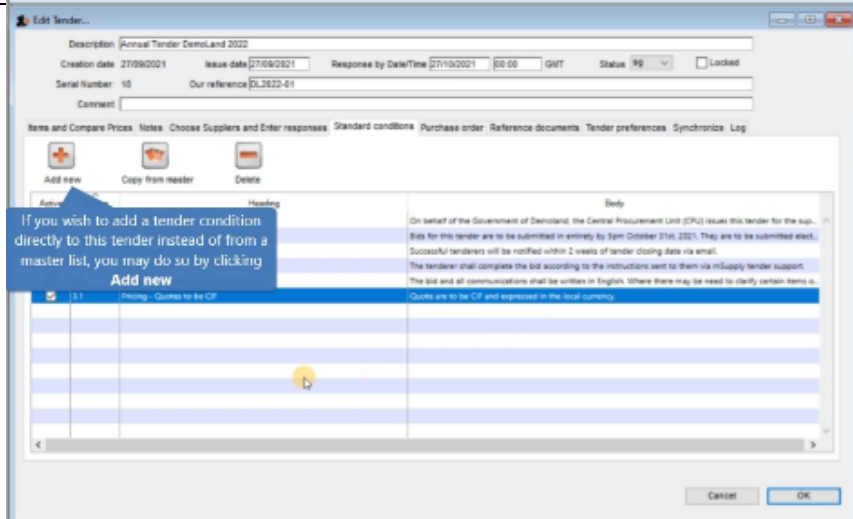
17. The click the **Delete** button



18. Click **Yes** to **Confirm** the deletion (in this example, I will select **No** as I do not wish to delete it)



19. If you wish to add a tender condition directly to the tender instead of from a master list, you may do so by clicking **Add new**.



20. Enter your new tender condition as before, then click **OK** or **OK & Next** to add another.

The screenshot shows the 'New tender condition' dialog box. It has a 'Heading' field and a 'Body' text area. A blue callout bubble with white text says: 'Enter your new tender condition as before, then click OK or OK & Next to add another.' The background shows the 'Edit Tender' window with a table of tender conditions.

Active	Order	Condition
<input checked="" type="checkbox"/>	1.1	Introduction
<input checked="" type="checkbox"/>	1.2	Opening bids and
<input checked="" type="checkbox"/>	1.3	Notification of b
<input checked="" type="checkbox"/>	1.4	Bid form
<input checked="" type="checkbox"/>	1.5	Language of bid
<input checked="" type="checkbox"/>	1.6	Prising - Quot

## Session 4.6 Add Suppliers to a Tender and Invite Responses

The next step is to add suppliers to the tender. This will allow you to send them invitations to tender, add their responses when received, and also create purchase orders from their quotes.

1. From the Tenders window, navigate to the **Choose Suppliers and Enter responses** tab.

Click **Add Suppliers**.

The screenshot shows the 'Edit Tender...' window for 'Annual Tender DemoLand 2022'. The 'Choose Suppliers and Enter responses' tab is selected. The 'Add Suppliers' button, represented by a plus icon, is highlighted with a red box. Other buttons like 'Delete Supplier', 'Print Invitation', and 'To Spreadsheet' are also visible. Below the buttons is a table with columns: Supplier Name, Supplier's code, Date Sent, Date Responded, Supplier ref, Total bid, Tender value, Currency, Total on PO, and RTM Link. The table is currently empty.

2. Double click to select a single supplier.

**To add multiple suppliers**, use the **Ctrl** key and click **Use**

You can click **New** to add a supplier that is not on your system.

The screenshot shows the 'Choose name...' dialog box. The 'New' button, represented by a plus icon, is highlighted with a red box. Below it is a list of suppliers with columns: Name, Code, and Is on hold. The list includes Archie Distribution, Azul Medica, Benchmark supplier, Montana Supplies, and Monty Meds. At the bottom, the 'Use' button is highlighted with a red box.

3. The list of chosen suppliers has been added!

The **RTM** link column indicates whether or not a supplier has been linked with the **Remote Tender Module** (to be discussed later)

The screenshot shows the 'Edit Tender...' window with the 'Choose Suppliers and Enter responses' tab. The table now contains the following data:

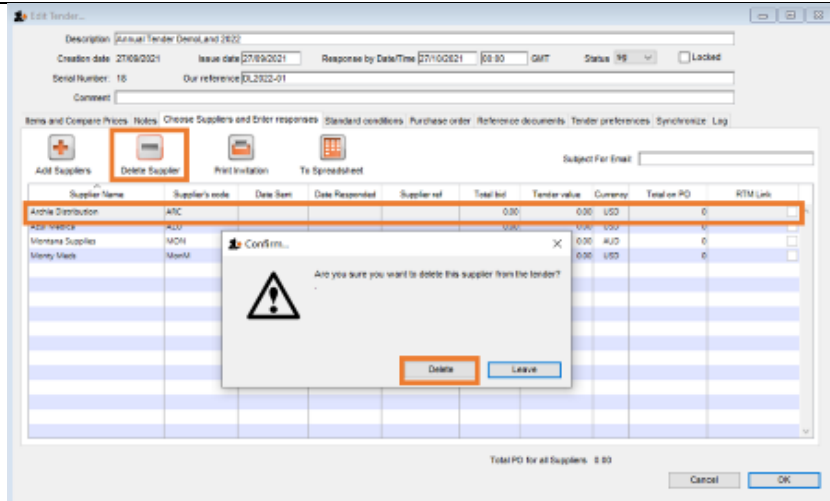
Supplier Name	Supplier's code	Date Sent	Date Responded	Supplier ref	Total bid	Tender value	Currency	Total on PO	RTM Link
Archie Distribution	ARC				0.00	0.00	USD	0	<input type="checkbox"/>
Azul Medica	AZU				0.00	0.00	USD	0	<input type="checkbox"/>
Montana Supplies	MON				0.00	0.00	AUD	0	<input type="checkbox"/>
Monty Meds	MonM				0.00	0.00	USD	0	<input type="checkbox"/>



#### 4. To delete a supplier from the tender,

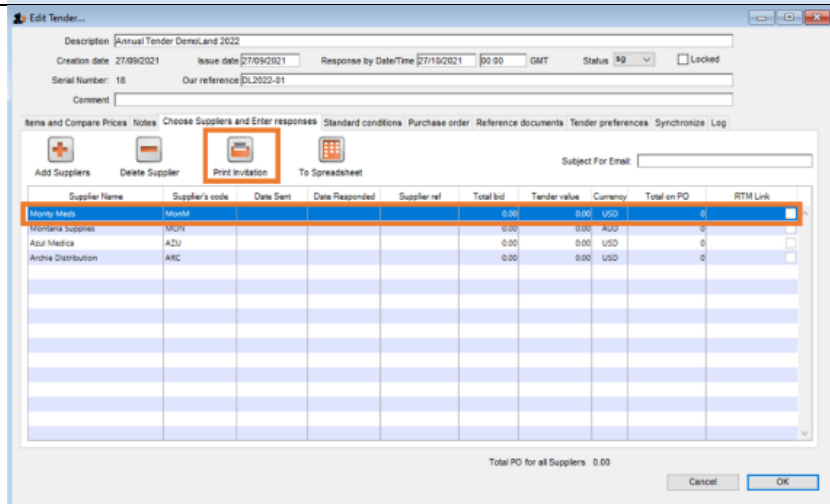
Select them from the list and click **Delete Supplier** and **Confirm** when prompted.

*This only deletes from the tender and not from mSupply*



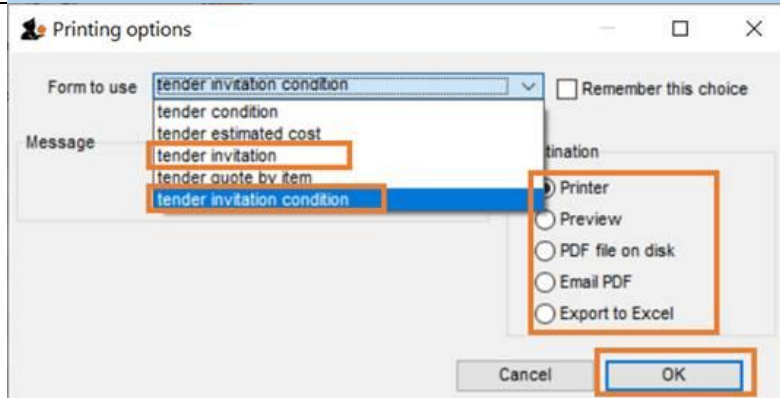
#### 5. To print the invitation,

Select your supplier with a single click and click **Print Invitation**

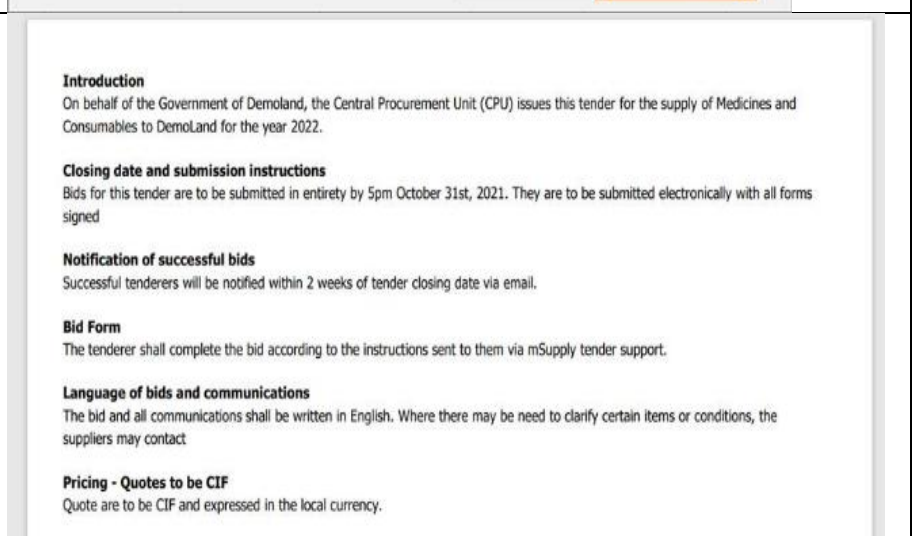



- Select which form you wish to generate
  - the **tender invitation** generates the list of items
  - the **tender invitation condition** generates the list of conditions

Then choose whether you'd like to send to **Printer**, save as **PDF file on disk**, **Email PDF** etc. Click **OK**



#### 7. This is an example of a **tender invitation condition** form



- 

To: Monty Meds

Issue Date: Monday, 27 September 2021  
 Response Required by: Wednesday, 27 October 2021  
 DL2022-01

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Annexe 1- items for tender- follows  
 Total number of Items: 2

Annex 1 : Items for tender

#	Item	Quantity	Suggeste Pack	Units	Total
1	Amoxicillin 500mg tablet	500	20		10,000
2	Ceftriaxone 250mg injection	40	10		400

- 
- e-mail message...
- To
- Reply to
- CC
- BCC
- Attachment C:\Users\yolan\AppData\Local\Temp\mSupply\Tender\_16330... Attach Delete
- Subject Your tender ID: 18 from Martin DemoLand attached.
- Message Please view the attached document
- Cancel Send

- [illegible]

### 11. Your spreadsheet application!

Supplier code :	MWH
Supplier name :	MWH
Supplier ID :	14498912587
Tender ID :	1770346

Annual Medicines and Consumables Tender 2022									
Profited by mSupply Tender module						To be completed by supplier			
						Mandatory fields		Non mandatory fields	
Internal Line ID	Line #	Item Code	Item Name	Requested Number of packs	Requested Pack size	Requested Total Qty	Units	Offered price per pack (CIP - Cost, Insurance and Freight)	Supplier
704785870862	1	amx500	Amoxicillin 500mg tablet	500	20	10000			
804054920862	2	cef250	Ceftriaxone 250mg injection	40	10	400			
90880344781	3	met500	Metronidazole 500mg/100ml vial	500	1	500			

The **Remote Tender Module (RTM)** is an online portal that allows suppliers to enter their own bids. This allows for greater transparency in the bidding process as no one is also able to access the bids during the bidding period nor edit them after the bidding period has closed. It also saves days to weeks of data entry and reduces the risk of transcription errors.

You will need to contact mSupply Support to help set this up for each tender as they will need to contact suppliers and provide logins and passwords for the Remote Tender Module.

### 12. To use the RTM, click on the **Synchronise** tab and click on the **Upload tender to web site** button

### 13. Click **Upload** when asked to confirm

*Please note you will still need to individually send the item list and conditions to your suppliers*

## Session 4.7 Receive and Enter Quotations from Suppliers

Suppliers can submit quotes directly to the procurement team or via the RTM.  
We will look at

- How to manually enter supplier quotes into mSupply
- Importing a tender response template that has been filled out
- How to download quotes from the Remote Tender Module

1. To select Supplier,  
From the **Edit Tender** window,  
select the **Choose Suppliers and Enter responses** tab  
Double click on the **Supplier** for  
whom you want to enter  
responses.

The screenshot shows the 'Edit Tender' window with the following details:

- Description: Annual Medicines and Consumables Tender 2022
- Creation date: 27/09/2021, Issue date: 27/10/2021, Response by Date/Time: 27/11/2021 00:00 GMT, Status: RB, Locked: ☐
- Serial Number: 18, Our reference: [empty]
- Comment: [empty]
- Navigation tabs: Items and Compare Prices, Note, **Choose Suppliers and Enter responses**, Standard conditions, Purchase order, Reference documents, Tender preferences, Synchronise, Log
- Buttons: Add Suppliers, Delete Supplier, Print Invitation, To Spreadsheet
- Subject For Email: [empty]
- Table with columns: Supplier Name, Supplier's code, Date Sent, Date Responded, Supplier ref, Total bid, Tender value, Cn, Total on PO
- Table data:

Supplier Name	Supplier's code	Date Sent	Date Responded	Supplier ref	Total bid	Tender value	Cn	Total on PO
Monty Meds	Monty				0.00	0.00 U.		
Monty	MONT				0.00	0.00 U.		
Azul Medica	AZU				0.00	0.00 U.		
- Total PO for all Suppliers: 0.00
- Buttons: Cancel, OK

2. To enter details,  
Enter the supplier's **reference** code,  
Enter the **Date fields** (Date sent,  
**Date responded**, Valid till)  
Select the **quote currency**  
To add specific item quotes, click  
**New line(s)**

The screenshot shows the 'Edit Quote' window with the following details:

- From supplier: Monty Meds
- Their reference: [empty]
- Dates: Date sent: 27/10/2021, Date responded: 26/11/2021, Valid till: 26/11/2021
- Freight: 0 per m3, 0 per kg
- Navigation tabs: Edit Quote, Reference documents, Comments
- Buttons: **New line(s)**, Delete line, Show, All
- This quote currency: **AUD**, Supplier's default: AUD
- Table with columns: Code, Item name, Pack Size, Currency, Price, Freight, Comment, Price in PO
- Buttons: OK & Next, OK

- To select items from the tender for which the suppliers have submitted quotes (items which received a response),  
You can press **Ctrl+A**, then click **Use**

Item name	Quantity	Pack Size
Amoxicillin 500mg tablet	500	20
Ceftriaxone 250mg injection	40	10

- To select individual item to enter a response,  
Double click the item for which you wish to enter a response

Code	Item name	Pack Size	Currency	Price	Freight	Comment	Price in PO
amo500t	Amoxicillin 500mg tablet	20	USD	6.00	0		0.00
cef250i	Ceftriaxone 250mg injection	10	USD	6.00	0		0.00

- To enter individual item response,  
Enter **Price, Tack (size)** and **Currency**. If Supplier has comment, enter now  
The **Price break** section can be used to note any % discounts offered by the Supplier. Click **OK & Next** to continue adding responses or **OK** if you are finished.

Price: 1.50, Pack: 20, Currency: AUD

Price break: Price break quantity: 0, Discount: 0

Price break notes:

Freight: Volume per pack (cm3): , Freight factor: 1, Freight for preferred pack: 0

Supplier: Supplier's code: , Exp date: , Supplier bar code: , Delivery time:

- Return to **Edit Quote** window to review quotes entered

Click **OK & Next** to enter quotes for the next supplier or **OK** if you are finished.

- After entering all suppliers' responses, the **Choose Suppliers and Enter responses** will look like this

The **Total bid** column refers to the value of the supplier's bid  
The **Tender value** column refers to the value of goods awarded to that supplier.

- To import a tender response from a supplier, Ensure the supplier has returned the correct template

Supplier code :	MonM
Supplier Name :	Monty
Supplier ID :	11FC1449
Tender ID :	9895258P
	55841c41
	BB96CFFD

**Annual Medicines and Consumables Tender**

Prefilled by mSupply Tender module				To be completed by supplier										
				Mandatory fields				Non mandatory fields						
Internal Line ID	Line	Item Code	Item Name	Requested Number of packs	Requested Pack size	Requested Total Qty	Units	Offered Price per pack (CFP - Cost, Insurance and Freight)	Currency	Expiry Date	Delivery Time	Supplier Item code	Manufacturer Name	Comments
084901EF66C6														
7C4785870882														
CD5C0A50	1	amc500t	Amoxicillin 500mg tablet	500	20	10000	tab	500	20 AUD	03/26	17 weeks		ARO	
BD4D515D0862	2	cefz250i	Ceftriaxone 250mg Injection	10	10	100	vial	10	5 AUD	05/23	12 weeks		MYLAN	
P9058CD3447E3	3	mcl500i	Mefenamic acid 500mg/100mL inj	500	1	500	bag	50	30 AUD	04/25	12 weeks		SANOFI	

- Double click on the supplier whose response is to be imported

10. Enter the relevant details of the quote as discussed previously.  
Click on the **Import tender** button

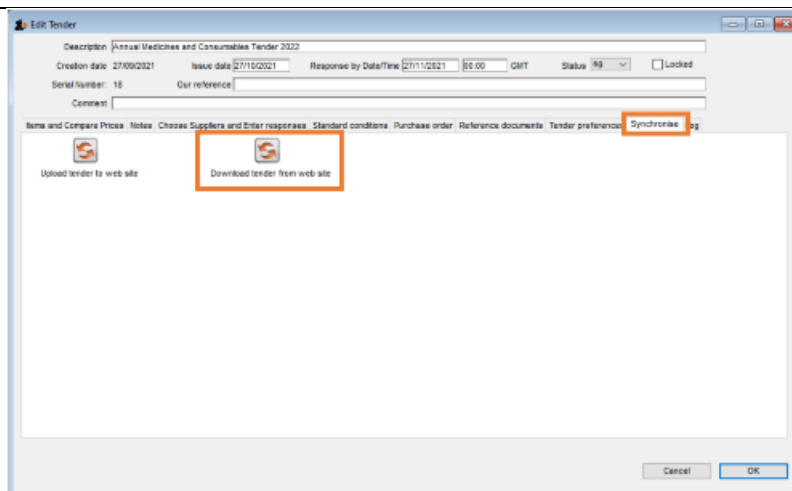
11. Select the correct file from your computer and click **Open**

12. **The supplier's bid has been imported!**  
Click **OK** to close this window or **OK & Next** to edit the next supplier's quote.

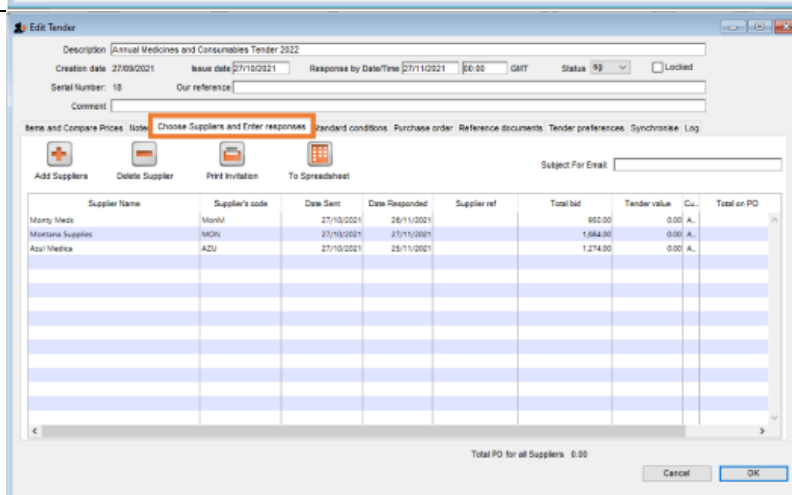
Using the RTM, you do not need to manually enter all the quotes or import templates from suppliers. You can just download their responses from the tender portal.



13. To download supplier responses,  
Click the **Download tender from website** button located on the **Synchronise** tab



14. Click **Choose Suppliers and Enter responses** tab to see the downloaded information!



## **Session 4.8 Add Comments and Attach Documents**

If you have asked suppliers for documents or corresponded with them during or after the bidding period, you can record them all within the Tender Module. This means everything related to the tender can be found in one place.

Overall comments or questions from you or the supplier can be recorded. This is different from the individual item comments that were shown in the previous unit.

1. To add overall tender comments,

Double click to select the supplier

Supplier Name	Supplier's code	Date Sent	Date Responded	Supplier ref	Total bid	Tender value	Cu	Total on PO
Monty Meds	MONT	27/10/2021	26/11/2021		900.00	0.00	A	
Montana Supplies	MON	27/10/2021	27/11/2021		1,684.00	0.00	A	
Azul Medica	AZU	27/10/2021	26/11/2021		1,278.00	0.00	A	

2. Select the **Comments** tab and enter the relevant comment

Click **OK & Next** to add comments for the next supplier or click **OK** to return to the **Choose Suppliers and Enter Responses** tab

My Comment: Please confirm that all items will be packaged and labeled in English.

Supplier comment: 3011021: Confirmed that all items will be packaged and labeled in English.

***If the supplier has provided any documents which need to be recorded, these can be uploaded to the Tender Module.***

- Double click on the supplier for whom you want to upload a document

Supplier Name	Supplier's code	Date Sent	Date Responded	Supplier ref	Total bid	Tender value	Cu.	Total on PO
Munty Meds	mmed	27/10/2021	28/11/2021		990.00	0.80	A.	
Montana supplies	MDS	27/10/2021	27/11/2021		1,684.00	0.80	A.	
Azul Medica	AZU	27/10/2021	28/11/2021		1,274.00	0.80	A.	

Total PO for all Suppliers: \$ 80

- Select the **Reference documents** tab and click **Upload document** and follow the prompts.

File Name	Created by	Created on	Saved on	Version no
Munty Meds - financial history .docx	Martin	7/12/2021 11:27:08	7/12/2021 11:27:08	1

- Document is now uploaded to the Tender Module!**

To view, document has to be downloaded. Click **Download document**.

File Name	Created by	Created on	Saved on	Version no
Munty Meds - financial history .docx	Martin	7/12/2021 11:27:08	7/12/2021 11:27:08	1




6. To delete, select the document and click **Delete document**.

**Edit Quote**


From supplier: Monty Meds

Their reference:

Edt Quote | Reference documents | Comments

 Upload document  **Delete document**  Download document

Show:

File Name	Created by	Created on	Saved on	Version no
 Monty meds - financial history .docx	Martin	7/12/2021 11:27:08	7/12/2021 11:27:08	1

OK & Next

## Session 4.9 Analyse and Compare Supplier Responses and Select Preferred Supplier for Items

Now it's time to analyse and compare supplier responses and prices, and select a preferred supplier.

1. Navigate to the **Items and Compare Prices** tab, and double click the item for which you wish to view and compare supplier bids.

Item Name: Amoxicillin 500mg tablet

Lin	Code	Item name	# of Packs	Pack Size	Total	Currency	Original	Original	PO local	Unit	Preferred Supplier	Item	Comme
1.	amo500t	Amoxicillin 500mg tablet	500	20	10000	0.00	0.00	0.00	0.00	No bids	preferenc...		
2.	cef250i	Ceftriaxone 250mg injection	40	10	400	0.00	0.00	0.00	0.00	No bids			

2. Lowest priced supplier will be highlighted in Blue.

Pref (Preferred) checkbox is marked against the supplier who is awarded the item.  
Disq (Disqualified) checkbox is optionally marked if a supplier is disqualified.

Item Name: Amoxicillin 500mg tablet

Supplier	Manufacturer	Price	Currency	Pack Size	Volume Tot. received	Price with Frit	Cost Local/Pack	Adj Cost	+/- %	Expiry date	Delivery time	Pref	Disq	Comment
Monty Meds		2.00	AUD	100	0	0.00	2.00	1.45	0.0145	0		<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Montana Supplies		1.50	AUD	20	0	0.00	1.50	1.09	0.0546	0		<input type="checkbox"/>	<input type="checkbox"/>	tablets in blister packs
Archie Distribution		3.00	AUD	10	0	0.00	3.00	2.18	0.2184	0		<input type="checkbox"/>	<input type="checkbox"/>	
Azul Medica		2.00	AUD	1	0	0.00	2.00	1.45	1.4560	0		<input type="checkbox"/>	<input type="checkbox"/>	

3. Select your preferred supplier by checking the relevant **checkbox**.

Click **OK & Next** to evaluate the next item on your tender or **OK** if you are finished.

Item Name: Amoxicillin 500mg tablet

Supplier	Manufacturer	Price	Currency	Pack Size	Volume Tot. received	Price with Frit	Cost Local/Pack	Adj Cost	+/- %	Expiry date	Delivery time	Pref	Disq	Comment
Monty Meds		2.00	AUD	100	0	0.00	2.00	1.45	0.0145	0		<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Montana Supplies		1.50	AUD	20	0	0.00	1.50	1.09	0.0546	0		<input type="checkbox"/>	<input type="checkbox"/>	tablets in blister packs
Archie Distribution		3.00	AUD	10	0	0.00	3.00	2.18	0.2184	0		<input type="checkbox"/>	<input type="checkbox"/>	
Azul Medica		2.00	AUD	1	0	0.00	2.00	1.45	1.4560	0		<input type="checkbox"/>	<input type="checkbox"/>	

4. You can review your tender.

If you wish to change a **Preferred Supplier**, you can double click on the Item and change the checkbox.

You can filter the items you view by clicking **Show** dropdown menu and applying the desired filters.

**Edit Tender**

Description: Annual Medicines and Consumables Tender 2022

Creation date: 27/09/2021 Issue date: 27/10/2021 Response by Date/Time: 27/11/2021 00:00 GMT Status: 99 Locked

Serial Number: 18 Our reference:

Comment:

Items and Compare Prices Notes Choose Suppliers and Enter responses Standard conditions Purchase order Reference documents Tender preferences Synchronise Log

New line Delete line Print Reports Search items

Incoterm: CF (Cost, Insurance and Freight) Show: All

Lin...	Code	Item name	# of Packs	Pack Size	Total quantity	Currency	Original	Original Local	PO local	Unit	Preferred Supplier	Item...	Comment
1	amo500t	Amoxicillin 500mg tablet	500	20	10000	AUD	750.00	750.00	0.00		Monty Meds	preferenc...	
2	cef250i	Ceftriaxone 250mg injection	40	10	400	AUD	184.00	184.00	0.00		Montana Supplies		

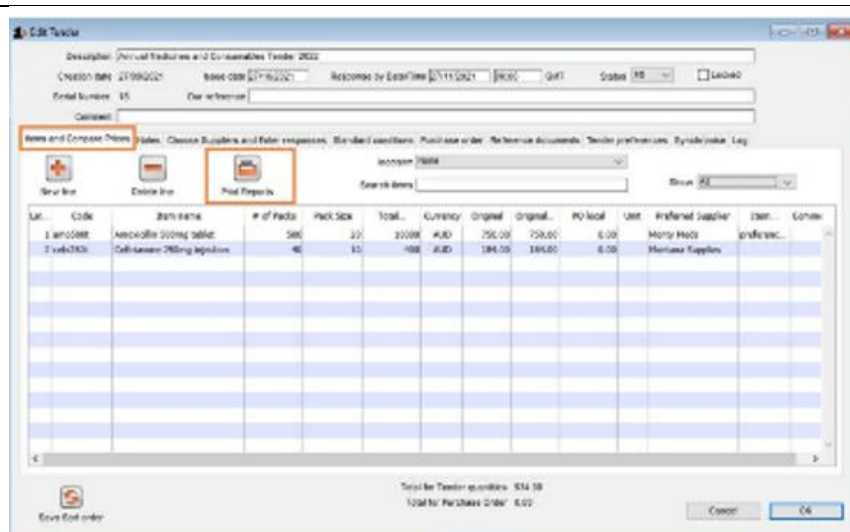
Total for Tender quantities: 0.00  
Total for Purchase Order: 0.00

Save Sort order Cancel OK

## Session 4.10 Tender Reports

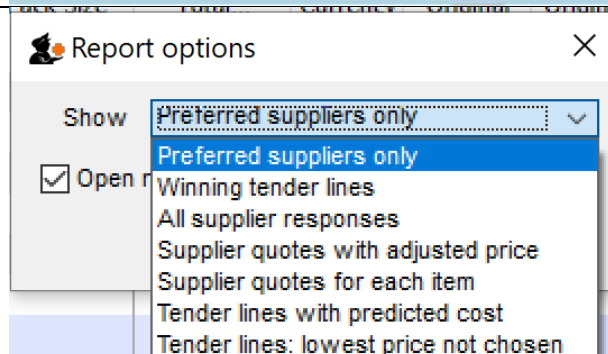
There are a number of Tender Reports which can be generated and exported to Excel if needed.

1. From the **Items and Compare Prices** tab, click **Print Reports**.



2. You can see the reports that can be generated.

Select the report you wish to generate and check the **Open in Excel** checkbox





### **Session 4.11** **Create Purchase Order from Tender - with Split or Single Deliveries**

You can generate Purchase Orders from the tender module. A Purchase Order is used to order stock from an external supplier (one who does not use mSupply).

1. To generate Purchase Orders with split deliveries,

Navigate to the **Tender preferences** tab. For the PO calculation method, select **Distribute Tender quantity evenly**. Ensure the **Create split deliveries** checkbox is ticked. Click **OK** to consolidate the changes.

**Edit Tender**

Description: Annual Medicines and Consumables Tender 2022

Creation date: 27/09/2021 Issue date: 27/10/2021 Response by Date/Time: 27/11/2021 00:00 GMT Status: 99 Locked

Serial Number: 18 Our reference:

Comment:

Items and Compare Prices Notes Choose Suppliers and Enter responses Standard conditions Purchase order Reference documents **Tender preferences** Synchronise Log

Purchase orders... PO calculation method: Distribute Tender quantity evenly

Bench mark supplier Bench mark supplier: None

Invitation letter ☐ Print item description instead of item name

Acceptance letter ☒ Print tender conditions

Create split deliveries ☒ Create split deliveries: For creating split deliveries, you have to create blank purchase orders and select fill quantities.

Cancel OK

2. Reopen your tender and navigate to the **Purchase Orders** tab. Click on **Create Blank POs**

[illegible]

3. **Select** the supplier(s),  
Enter an **Expected delivery date**.  
Click **OK**

Expected delivery date: 4/02/2022

Code	Supplier Name	Currency code
MonM	Monty Meds	AUD
AZU	Azul Medica	AUD

Cancel OK

4. Repeat the previous 2 steps until you have the required number of Blank Purchase Orders.

Annual Medicines and Consumables Tender 2022

Creation date: 27/09/2021 Issue date: 27/10/2021 Response by Date/Time: 27/11/2021 00:00 GMT Status: 99 Locked

Serial Number: 18 Our reference: Comment:

Items and Compare Prices Notes Choose Suppliers and Enter responses Standard conditions Purchase order Reference documents Tender preferences Synchronise Log

Create Blank POs Delete PO Convert to SG Show selected PO Print acceptance letter Fill quantities

PO number	Supplier	Description	Status	Requested Delivery	Total in PO	Currency	Target days
43	Montana Supplies	Annual Medicines and Consumables	tn	4/08/2022	0	AUD	1
41	Montana Supplies	Annual Medicines and Consumables	tn	4/02/2022	0	AUD	1
40	Monty Meds	Annual Medicines and Consumables	tn	4/02/2022	0	AUD	1
42	Monty Meds	Annual Medicines and Consumables	tn	4/08/2022	0	AUD	1

5. Select the purchase orders.  
Click the **Fill Quantities** button.  
Click **Yes** when asked to confirm.

Annual Medicines and Consumables Tender 2022

Creation date: 27/09/2021 Issue date: 27/10/2021 Response by Date/Time: 27/11/2021 00:00 GMT Status: 99 Locked

Serial Number: 18 Our reference: Comment:

Items and Compare Prices Notes Choose Suppliers and Enter responses Standard conditions Purchase order Reference documents Tender preferences Synchronise Log

Create Blank POs Delete PO Convert to SG Show selected PO Print acceptance letter Fill quantities

PO number	Supplier	Description	Status	Requested Delivery	Total in PO	Currency	Target days
43	Montana Supplies	Annual Medicines and Consumables	tn	4/08/2022	0	AUD	1
41	Montana Supplies	Annual Medicines and Consumables	tn	4/02/2022	0	AUD	1
40	Monty Meds	Annual Medicines and Consumables	tn	4/02/2022	0	AUD	1
42	Monty Meds	Annual Medicines and Consumables	tn	4/08/2022	0	AUD	1

Cancel OK

6. Quantities and values filled!

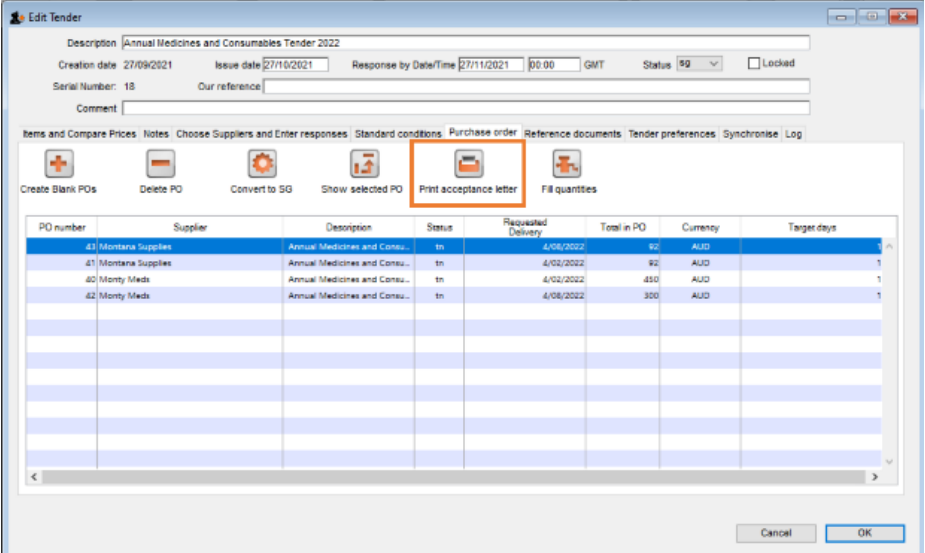
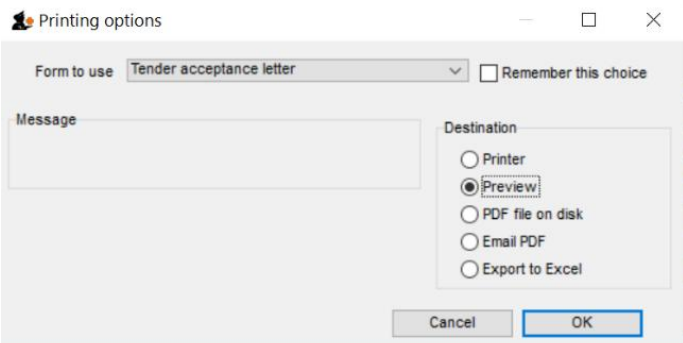
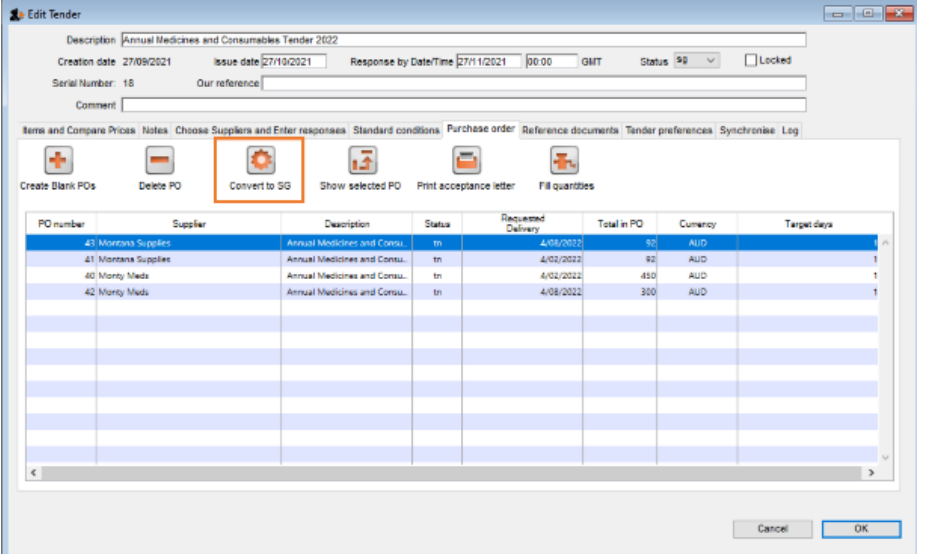
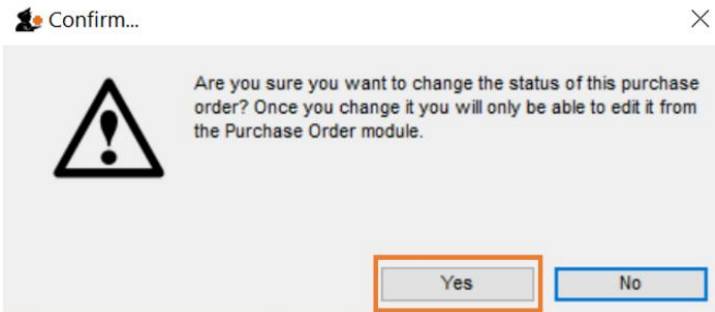
You can see that the **Total in PO** column has been filled.

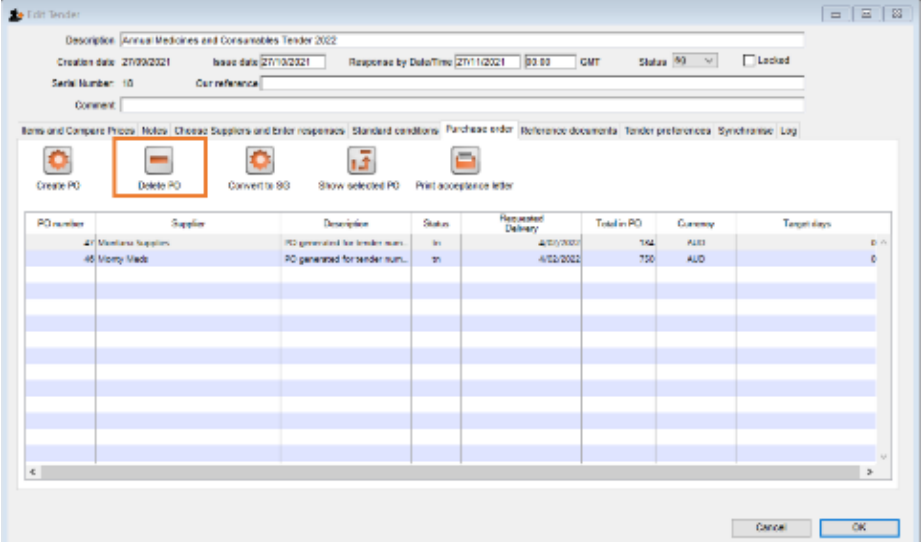
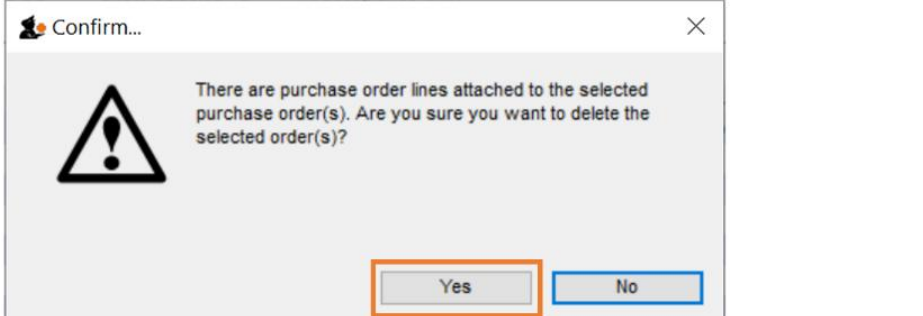
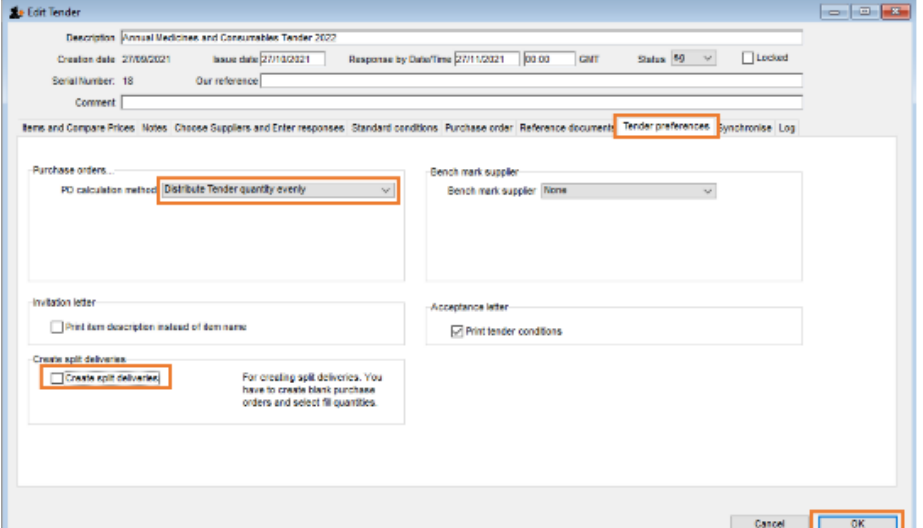
7. Change quantities on a purchase order by navigating to the **Items and Compare Prices** tab and **select** the item.

8. Navigate to the **Purchase order** tab

Change the **Quantity** required for each delivery

Click **OK**

<p>9. Print Acceptance letter by clicking the <b>Print acceptance letter</b> button</p>	
<p>10. Follow the <b>Printing options</b> prompts and click <b>OK</b></p>	
<p>11. Select the purchase order and <b>Convert to SG</b></p>	
<p>12. Click <b>Yes</b> when asked to confirm</p> <p>Once the status of all your purchase orders are converted to SG, the status of your tender will be fn (finalized)</p>	

<p>13. To delete a PO, click the <b>Delete PO</b> button</p>	 <table border="1"><thead><tr><th>PO number</th><th>Supplier</th><th>Description</th><th>Status</th><th>Requested Delivery</th><th>Total in PO</th><th>Currency</th><th>Target days</th></tr></thead><tbody><tr><td>47</td><td>Mentana Supplies</td><td>PO generated for tender num...</td><td>In</td><td>4/10/2021</td><td>142</td><td>AUD</td><td>0</td></tr><tr><td>48</td><td>Mentana Supplies</td><td>PO generated for tender num...</td><td>In</td><td>4/10/2021</td><td>150</td><td>AUD</td><td>0</td></tr></tbody></table>	PO number	Supplier	Description	Status	Requested Delivery	Total in PO	Currency	Target days	47	Mentana Supplies	PO generated for tender num...	In	4/10/2021	142	AUD	0	48	Mentana Supplies	PO generated for tender num...	In	4/10/2021	150	AUD	0
PO number	Supplier	Description	Status	Requested Delivery	Total in PO	Currency	Target days																		
47	Mentana Supplies	PO generated for tender num...	In	4/10/2021	142	AUD	0																		
48	Mentana Supplies	PO generated for tender num...	In	4/10/2021	150	AUD	0																		
<p>14. Click <b>Yes</b> when asked to confirm</p> <p><b>The PO has been deleted!</b></p>	 <p>There are purchase order lines attached to the selected purchase order(s). Are you sure you want to delete the selected order(s)?</p> <p><b>Yes</b> No</p>																								
<p>15. To create a purchase order from a tender with a single delivery,</p> <p>Navigate to the <b>Tender preferences</b> tab. Select <b>Distribute Tender quantity evenly</b>. Ensure the <b>Create split deliveries</b> box is NOT ticked. Click <b>OK</b></p>																									

16. Navigate to the **Purchase order** tab. Click **Create PO**

[illegible]

17. Click **Yes** to confirm

**18. Purchase orders created!**

[illegible]

Repeat this step for each PO

[illegible]

Repeat this step for each PO

**Edit tender**

Description: Annual Medicines and Consumables Tender 2022

Creation date: 27/09/2021 Issue date: 27/10/2021 Response by Date/Time: 27/11/2021 00:00 GMT Status: R Locked

Serial Number: 15 Our reference:

Comment:

Items and Compare Prices, Notes, Choose Suppliers and Enter responses, Standard conditions, Purchase order, Reference documents, Tender preferences, Synchronise, Log

Create PO Delete PO **Convert to GG** Show selected PO Print acceptance letter

PO number	Supplier	Description	Status	Requested Delivery	Total in PO	Currency	Target days
47	Montana Supplies	PO generated for tender num...	In	4/02/2022	164	AUD	0
48	Monty Made	PO generated for tender num...	In	4/02/2022	750	AUD	0

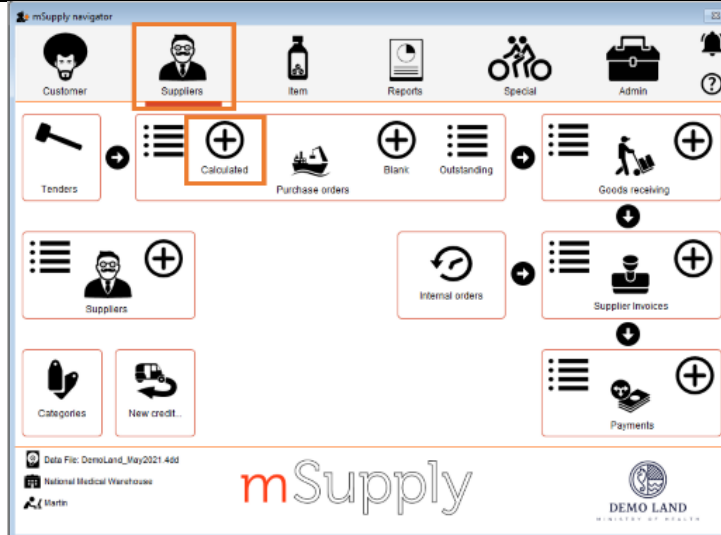
Cancel OK



## Session 4.12 Create Calculated Purchase Order

This is when mSupply takes into account how much stock has been used, how much stock is on hand and how much it expects it will need to order to cover until the next ordering cycle.

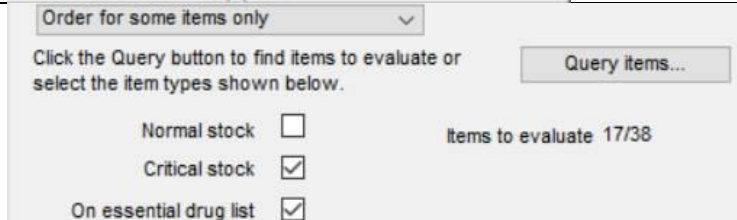
1. Navigate to the **Suppliers** tab.  
Click on the **Calculated Purchase Orders** button.



2. Select ordering by supplier or item

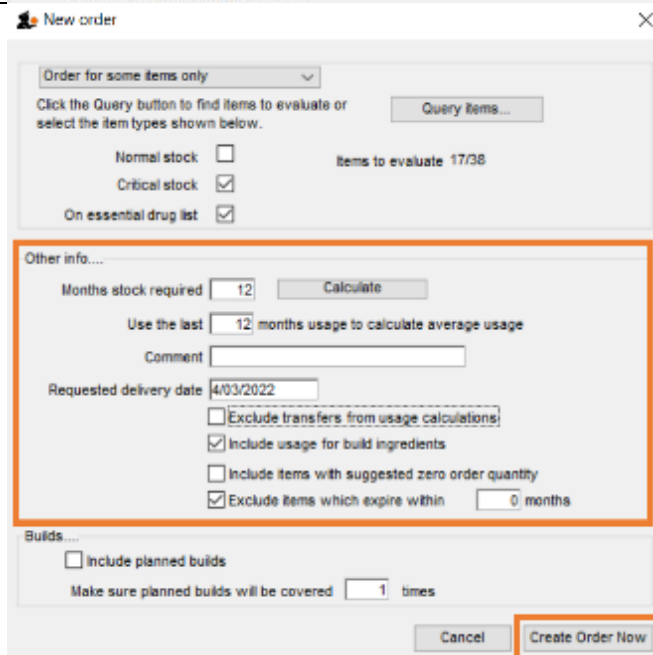


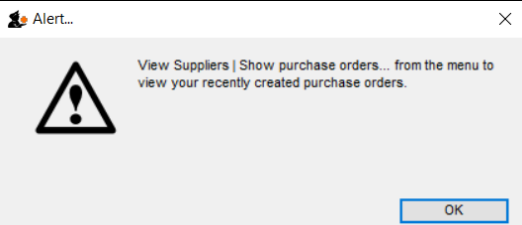

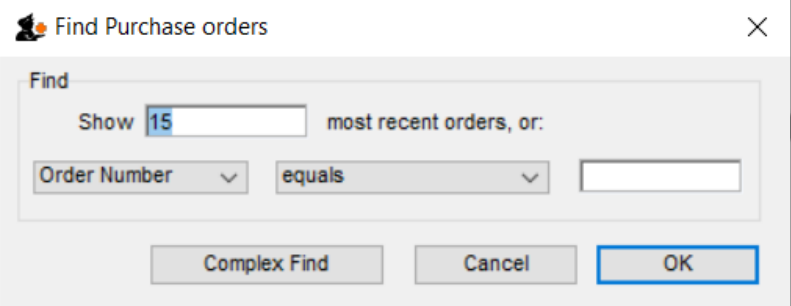
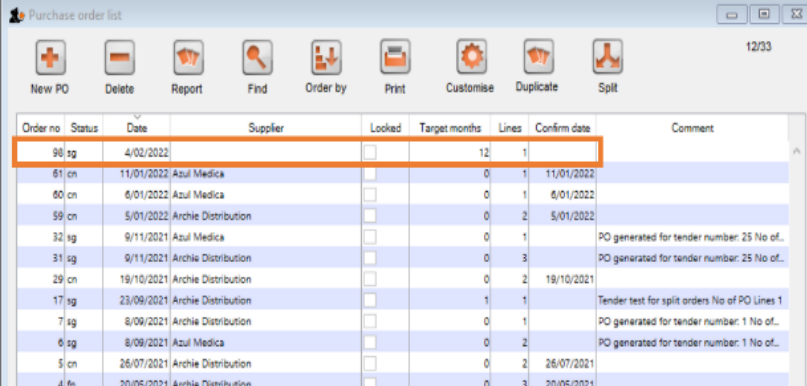
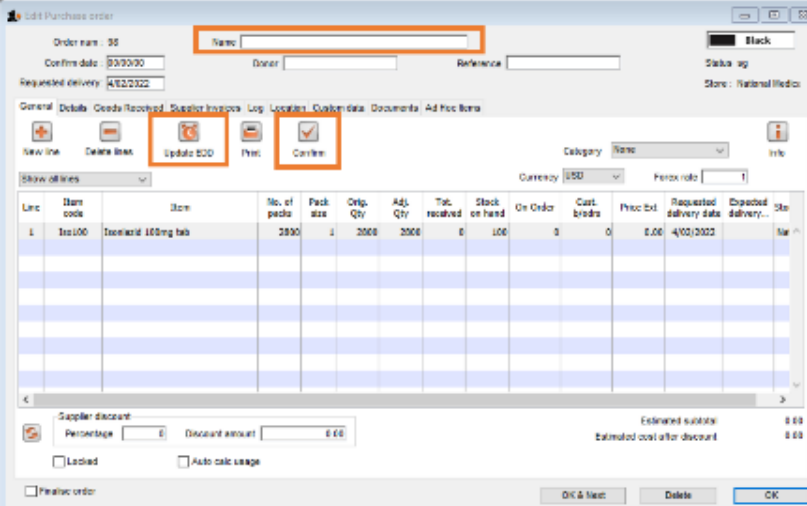
3. If you wish to order for some items only, select the items based on how they have been categorised



4. Enter other information..

Enter **Months of stock** manually or use **Calculate** button  
Enter **Months usage to calculate average usage**  
Enter **Requested delivery date**  
Ensure **Exclude transfers from usage calculations** is NOT ticked  
Click **Create Order Now**



<p>5. Purchase order has been generated!</p> <p>Click <b>OK</b></p>																																																																																																																						
<p>6. To find and view Calculated Purchase Order, click on the <b>List</b> button</p>																																																																																																																						
<p>7. Click <b>OK</b></p>																																																																																																																						
<p>8. Double click on the corresponding order from the list</p>	 <table><tr><th>Order no</th><th>Status</th><th>Date</th><th>Supplier</th><th>Looked</th><th>Target months</th><th>Lines</th><th>Confirm date</th><th>Comment</th></tr><tr><td>90</td><td>sg</td><td>4/02/2022</td><td></td><td><input type="checkbox"/></td><td>12</td><td>1</td><td></td><td></td></tr><tr><td>61</td><td>on</td><td>11/01/2022</td><td>Azul Medica</td><td><input type="checkbox"/></td><td>0</td><td>1</td><td>11/01/2022</td><td></td></tr><tr><td>60</td><td>on</td><td>6/01/2022</td><td>Azul Medica</td><td><input type="checkbox"/></td><td>0</td><td>1</td><td>6/01/2022</td><td></td></tr><tr><td>59</td><td>on</td><td>5/01/2022</td><td>Archie Distribution</td><td><input type="checkbox"/></td><td>0</td><td>2</td><td>5/01/2022</td><td></td></tr><tr><td>32</td><td>sg</td><td>9/11/2021</td><td>Azul Medica</td><td><input type="checkbox"/></td><td>0</td><td>1</td><td></td><td>PO generated for tender number: 25 No of...</td></tr><tr><td>31</td><td>sg</td><td>9/11/2021</td><td>Archie Distribution</td><td><input type="checkbox"/></td><td>0</td><td>3</td><td></td><td>PO generated for tender number: 25 No of...</td></tr><tr><td>29</td><td>on</td><td>19/10/2021</td><td>Archie Distribution</td><td><input type="checkbox"/></td><td>0</td><td>2</td><td>19/10/2021</td><td></td></tr><tr><td>17</td><td>sg</td><td>23/09/2021</td><td>Archie Distribution</td><td><input type="checkbox"/></td><td>1</td><td>1</td><td></td><td>Tender test for split orders No of PO Lines 1</td></tr><tr><td>7</td><td>sg</td><td>8/09/2021</td><td>Archie Distribution</td><td><input type="checkbox"/></td><td>0</td><td>1</td><td></td><td>PO generated for tender number: 1 No of...</td></tr><tr><td>6</td><td>sg</td><td>8/09/2021</td><td>Azul Medica</td><td><input type="checkbox"/></td><td>0</td><td>2</td><td></td><td>PO generated for tender number: 1 No of...</td></tr><tr><td>5</td><td>on</td><td>26/07/2021</td><td>Archie Distribution</td><td><input type="checkbox"/></td><td>0</td><td>2</td><td>26/07/2021</td><td></td></tr><tr><td>4</td><td>fn</td><td>20/05/2021</td><td>Archie Distribution</td><td><input type="checkbox"/></td><td>0</td><td>3</td><td>20/05/2021</td><td></td></tr></table>	Order no	Status	Date	Supplier	Looked	Target months	Lines	Confirm date	Comment	90	sg	4/02/2022		<input type="checkbox"/>	12	1			61	on	11/01/2022	Azul Medica	<input type="checkbox"/>	0	1	11/01/2022		60	on	6/01/2022	Azul Medica	<input type="checkbox"/>	0	1	6/01/2022		59	on	5/01/2022	Archie Distribution	<input type="checkbox"/>	0	2	5/01/2022		32	sg	9/11/2021	Azul Medica	<input type="checkbox"/>	0	1		PO generated for tender number: 25 No of...	31	sg	9/11/2021	Archie Distribution	<input type="checkbox"/>	0	3		PO generated for tender number: 25 No of...	29	on	19/10/2021	Archie Distribution	<input type="checkbox"/>	0	2	19/10/2021		17	sg	23/09/2021	Archie Distribution	<input type="checkbox"/>	1	1		Tender test for split orders No of PO Lines 1	7	sg	8/09/2021	Archie Distribution	<input type="checkbox"/>	0	1		PO generated for tender number: 1 No of...	6	sg	8/09/2021	Azul Medica	<input type="checkbox"/>	0	2		PO generated for tender number: 1 No of...	5	on	26/07/2021	Archie Distribution	<input type="checkbox"/>	0	2	26/07/2021		4	fn	20/05/2021	Archie Distribution	<input type="checkbox"/>	0	3	20/05/2021	
Order no	Status	Date	Supplier	Looked	Target months	Lines	Confirm date	Comment																																																																																																														
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17	sg	23/09/2021	Archie Distribution	<input type="checkbox"/>	1	1		Tender test for split orders No of PO Lines 1																																																																																																														
7	sg	8/09/2021	Archie Distribution	<input type="checkbox"/>	0	1		PO generated for tender number: 1 No of...																																																																																																														
6	sg	8/09/2021	Azul Medica	<input type="checkbox"/>	0	2		PO generated for tender number: 1 No of...																																																																																																														
5	on	26/07/2021	Archie Distribution	<input type="checkbox"/>	0	2	26/07/2021																																																																																																															
4	fn	20/05/2021	Archie Distribution	<input type="checkbox"/>	0	3	20/05/2021																																																																																																															
<p>9. Review</p> <p>Enter Name of supplier if necessary</p> <p>Click <b>Confirm</b></p>	 <p>Order name: 30    Name: <input type="text"/>    Donor: <input type="text"/>    Reference: <input type="text"/>    Status: sg    Store: National Medical</p> <p>Confirm date: 03/03/20    Requested delivery: 4/02/2022</p> <p>General    Details    Goods Received    Supplier Invoices    Log    Logistics    Customer data    Documents    Add Price Items</p> <p>New line    Delete line    <b>Update B2D</b>    Print    <b>Confirm</b></p> <table><tr><th>Line</th><th>Item code</th><th>Item</th><th>No. of packs</th><th>Pack size</th><th>Orig. QTY</th><th>Adj. QTY</th><th>Tot. received</th><th>Stock on hand</th><th>On Order</th><th>Cost. break</th><th>Price</th><th>Requested delivery date</th><th>Expected delivery...</th><th>Site</th></tr><tr><td>1</td><td>Isos100</td><td>Isoserial 100mg tab</td><td>2000</td><td>1</td><td>2000</td><td>2000</td><td>0</td><td>100</td><td>0</td><td>0</td><td>0.00</td><td>4/02/2022</td><td></td><td>na</td></tr></table> <p>Supplier discount: Percentage: 0    Discount amount: 0.00    Estimated subtotal: 0.00    Estimated cost after discount: 0.00</p> <p><input type="checkbox"/> Locked    <input type="checkbox"/> Auto calc usage    <input type="checkbox"/> Partial order</p> <p>OK &amp; Next    Delete    <b>OK</b></p>	Line	Item code	Item	No. of packs	Pack size	Orig. QTY	Adj. QTY	Tot. received	Stock on hand	On Order	Cost. break	Price	Requested delivery date	Expected delivery...	Site	1	Isos100	Isoserial 100mg tab	2000	1	2000	2000	0	100	0	0	0.00	4/02/2022		na																																																																																							
Line	Item code	Item	No. of packs	Pack size	Orig. QTY	Adj. QTY	Tot. received	Stock on hand	On Order	Cost. break	Price	Requested delivery date	Expected delivery...	Site																																																																																																								
1	Isos100	Isoserial 100mg tab	2000	1	2000	2000	0	100	0	0	0.00	4/02/2022		na																																																																																																								

## ***Session 4.13 Create Blank Purchase Order***

1. Navigate to the **Suppliers** tab  
Click on the **Blank Purchase Orders** button

mSupply navigator

Customer Suppliers Item Reports Specials Admin

Tenders Calculated Purchase orders Blank Outstanding Goods receiving

Suppliers Internal orders Supplier invoices

Categories New credit... Payments

Data File: DemoLand\_May2021.dsd  
 Hospital: Medical Warehouse  
 Martin

mSupply  
 DEMO LAND  
 MINISTRY OF HEALTH

2. Enter **Name** of supplier, Donor details and **Reference** numbers, **Requested delivery date**. Click **New line** to add items to purchase order.

[illegible]

3. Select items and quantity. Select name of the **Item** to order. Enter **Number of packs, Pack size**. The **Total quantity** is automatically calculated. Enter **Expected delivery date, to**. Add **Comments or Notes**.
- Click **OK** if you are finished or **OK & Next** to add another item.

New purchase order line

General
Usage
Quotes
Receipt history
Ledger

Item
Amoxicillin 500mg tablet
Store: National Medical W...
amo500t

Location
Volume per pack 0 m3
Shelf location None

Original order

Number of packs	Pack size	Total Quantity	Units (ea, kg, ml)	Supplier item code
50	100	5000	Tab	

Pricing for this item

Price before discount	Discount (%)	Price after discount	Line total
0.00	0	0.00	0.00

Requested delivery date 5/02/2022
Expected delivery date 00/00/00

Stock

On hand	700	On backorder	0	On order	0	Received on previous deliveries	0
---------	-----	--------------	---	----------	---	---------------------------------	---

Comment (will print on purchase order)
Please supply blister packs

Notes
☐ Show notes on Goods Received

Benchmark supplier
Prices: Min: 0, Avg: 1.5, Max: 0

Cancel
OK
OK & Next

4. To delete an item, click on the affected line(s) and **Delete lines**.

Order num: 59 Name: Archie Distribution

Confirm date: 5/01/2022 Donor: Reference: Status: on

Requested delivery: 5/02/2022 Store: National Medic

General Details Goods Received Supplier Invoices Log Location Custom data Documents

New line **Delete lines** Update EDD Print Confirm

Category: None Currency: AUD Forex rate: 1

Line	Item code	Item	No. of packs	Pack size	Orig. Qty	Adj. Qty	Tot. received	Stock on hand	On Order	Cust. b/odrs	Price Est	Requested delivery date	Expected delivery...	Sto
1	amo500t	Amoxicillin 500mg tablet	50	100	5000	5000	0	700	0	0	150.00	5/02/2022		Na
2	met500t	Metformin 500mg tab	10	500	5000	5000	0	2200	500	0	100.00	5/02/2022		Na

Supplier discount: Percentage: 0 Discount amount: 0.00

Estimated subtotal: 250.00

Estimated cost after discount: 250.00

☐ Locked ☐ Auto calc usage

☐ Finalise order

OK & Next Delete OK

5. Review.  
Select the purchase order **category**. Check and change **Currency** if needed. **Confirm**.

Order num: 59 Name: Archie Distribution

Confirm date: 5/01/2022 Donor: Reference: Status: on

Requested delivery: 5/02/2022 Store: National Medic

General Details Goods Received Supplier Invoices Log Location Custom data Documents

New line Delete lines Update EDD Print **Confirm**

Category: None Currency: AUD Forex rate: 1

Line	Item code	Item	No. of packs	Pack size	Orig. Qty	Adj. Qty	Tot. received	Stock on hand	On Order	Cust. b/odrs	Price Est	Requested delivery date	Expected delivery...	Sto
1	amo500t	Amoxicillin 500mg tablet	50	100	5000	5000	0	700	0	0	150.00	5/02/2022		Na
2	met500t	Metformin 500mg tab	10	500	5000	5000	0	2200	500	0	100.00	5/02/2022		Na

Supplier discount: Percentage: 0 Discount amount: 0.00

Estimated subtotal: 250.00

Estimated cost after discount: 250.00

☐ Locked ☐ Auto calc usage

☐ Finalise order

OK & Next Delete OK

6. Click **Yes** to confirm

Confirm...

Do you really want to confirm the order?

Yes No

## 7. The Purchase Order is complete!

Click **Print**  
Click **OK**

Line	Item code	Item	No. of packs	Pack size	Orig. Qty	Adj. Qty	Tot. received	Stock on hand	On Order	Cust. b/ads	Price Est.	Requested delivery date	Expected delivery date	Store
1	amc0001	Amoxicillin 500mg tablet	50	100	5000	5000	0	700	0	0	150.00	5/02/2022		Na
2	me5000	Metformin 500mg tab	10	500	5000	5000	0	2200	500	0	100.00	5/02/2022		Na

## 8. To view a list of purchase orders,

Click the **List** button in the **Purchase orders** module

## 9. Enter search filters or click **OK** to show the most recent orders

## 10. To edit confirmed purchase orders, Open the PO and select the item you want to edit. Enter the new **Number of packs**. Click **OK**

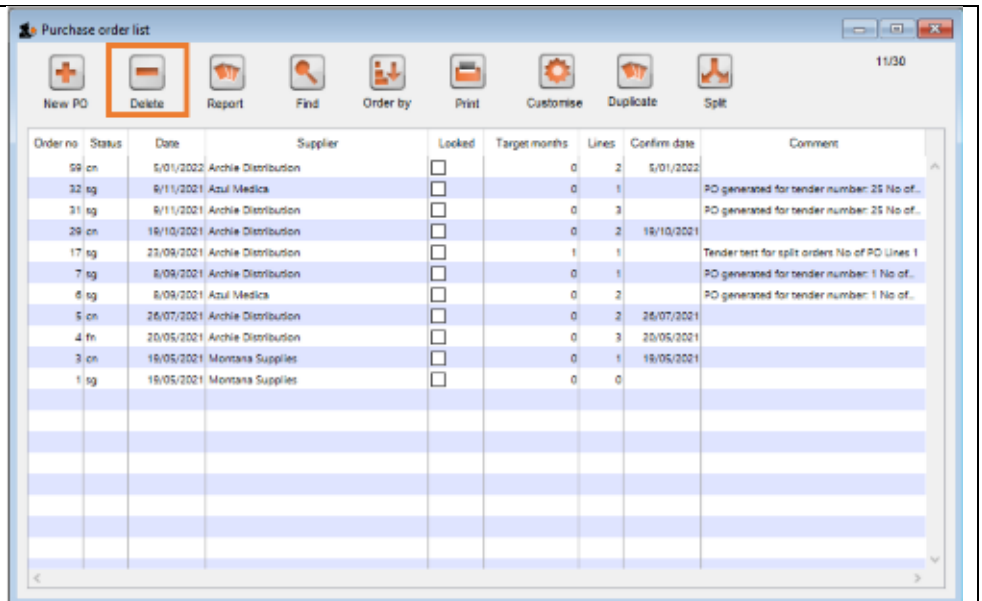
Original order	Pack size	Total Quantity	Units (ea,kg,ml)	Supplier item code	Price before discount	Discount (%)	Price after discount	Line total
20	100	2000	Tab		2.00	0	2.00	80.00

Stock	On hand	On backorder	On order	Received on previous deliveries
	0	0	7.000	0

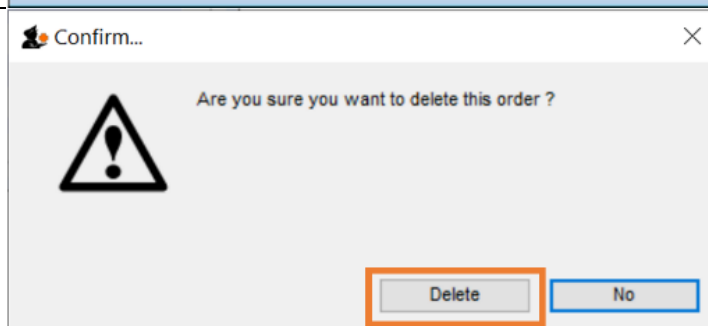
Adjusted order	Number of packs	Pack size is same as for original order	Total Quantity
	40		4000

11. To delete a purchase order,

Select it from the List of POs by clicking on it and click **Delete**.



12. Click **Delete** to confirm



## Session 4.14 Goods Receiving

Goods Receiving is used to receive stock from an external supplier who we previously ordered stock from via a purchase order. We can then create a Supplier Invoice directly from the Goods Receipt to add received stock to our inventory.

1. Navigate to the **Suppliers** tab  
Click on the **New Goods Receiving** button



2. Enter the **Supplier** in the field, press **tab** on your keyboard



3. Select the corresponding purchase order (look at **Our PO ID**). Click **OK**

Supplier	PO Reference	Our PO ID	Comment
Archie Distribution		5	
Archie Distribution		29	
Archie Distribution		59	

4. Enter **Received date**, **Supplier reference**, **Comment** or **Donor**. Click **Add from purchase order** to receive goods from the PO

*Note that items are added individually as orders can be split, arrive separately or be different from the original order.*

[illegible]

6. Update the received **Quantity, Pack size, Batch, Expiry** and the **Location**. Click **Add line** if you are splitting the delivery into separate locations or multiple batches have arrived.

Click **OK & Next** to move on to the next item or **OK** if you are finished

**Edit item..**

Item:  amo500t

Remaining quantity to receive: 0      Packs of: 100

Quantity	Pack Size	Total quan	Batch	Expiry	Location	Comment
30	100	3000	ASS32	31/01/2024	oral	
20	100	2000	MF246	31/08/2024	oral	
50 Total received		5000				

**Location Details**

Total capacity: 0 m3      Volume per pack:  m3  
 Available space: 0 m3      Space required: 0 m3  
 Weight Per Pack:  kg  
 Total Line Weight: N/A kg

Comment:

7. Review. Check **Finalise** box. Click **OK**

Review goods receipt

Supplier: Archia Distribution

Goods received M: 7

Created by: Martin

Modified by:

Entry date: 05/01/2022

Purchase order: 08

Supplier Invoice: 5

Release: new

Unit	Location	Item code	Item name	Code	Exp date	Pack size	Open
1	oral	amo500t	Amoxicillin 500mg tablet	AMC11	30/06/2024	100	08
2	oral	amo500t	Amoxicillin 500mg tablet	AMC11	30/06/2024	100	08
3	oral	met500t	Metformin 500mg tab	MEC11	30/06/2025	100	08

Finalise

OK & Next

Delete

OK

8. Click **Finalise** when prompted

Confirm...

Are you sure you want to finalise this goods receipt?  
If you finalise then you will not be able to edit this goods receipt any further.

Finalise

Cancel

9. A Supplier invoice automatically opens up.  
Double click the line to edit details if necessary.  
Click **OK & Next** to edit the next line or **OK** to return to the Supplier invoice

Supplier Invoice

Name: Archia Distribution

Confirm date: 05/01/22

Colour: Black

Invoice number: 27

Entry date: 05/01/2022

Category: None

Group: mw

By: Martin

By: National Medical Warehouse

Price extension

Line	Item code	Item name	Received quantity	Invoice quantity	Invoice pack size	Invoice total quantity	Location	Volume per pack	Weight per pack	Adjusted local cost	% Margin	Sell price
1	oral	amo500t	Amoxicillin 500mg tablet	0	0	0.00	oral	0 m3	1 kg	3.00	0.00	3.00
2	oral	amo500t	Amoxicillin 500mg tablet	0	0	0.00	oral	0 m3	1 kg	3.00	0.00	3.00
3	oral	met500t	Metformin 500mg tab	0	0	0.00	oral	0 m3	1 kg	3.00	0.00	3.00

Subtotal: 250.00

6 % tax: 6.00

Total: 250.00

OK & Next

Delete

OK

10. To confirm the supplier invoice in order to get items received into stock,

Uncheck the **Hold** box. Click **OK**. Confirm when prompted. Click **Finalise** box before clicking **OK**

Supplier Invoice

Name: Archie Distribution  
Ther ref: ARC  
Comment: Goods received ID : 7  
Confirm date: 05/01/2022  
Category: None  
Donor:   
Colour: Black  
Invoice number: 2/  
Entry date: 05/01/2022  
Status: new  
Goods received ID: 7  
Purchase Order ID: 58  
Requisition ID: 0  
Entered by: Martin  
Store: National Medical Warehouse

General Summary by Item Summary by Batch Price Log

Line no.	Item code	Item Name	Unit Price	Price extension
1	oral amo500t	Amoxicillin 500mg tablet	3.00	98.00
2	oral amo500t	Amoxicillin 500mg tablet	3.00	68.00
3	oral met500t	Metformin 500mg tab	18.00	180.00

Other charges:  
Item(s):  
Amount: 0.00

Subtotal: 256.00  
0 % tax: 8.00  
Total: 256.00

☐ Hold  
☐ Finalise

Export batch: 0  
Margin: 0.00

OK & Next Delete OK

11. To Finalise the purchase order,  
  
Click **Purchase Orders List**

mSupply navigator

Customer Suppliers Item Reports Special Admin

Tenders Calculated Purchase orders Blank Outstanding Goods receiving

Suppliers Internal orders Supplier invoices

Categories New credit Payments

Data File: DemoLand\_May2021-468  
National Medical Warehouse  
Martin

mSupply

DEMO LAND  
MINISTRY OF HEALTH

12. Add search filters required.  
Click **OK** to view most recent orders.

Find Purchase orders

Find

Show 15 most recent orders, or:

Order Number equals

Complex Find Cancel OK

13. Double click to select Purchase Order you wish to finalise

Purchase order list

Order no	Status	Date	Supplier	Loaded	Target month	Lines	Confirm date	Comments
59	OK	8/01/2022	Archae Distribution	<input type="checkbox"/>	0	2	8/01/2022	
32	sp	8/11/2021	Archae Distribution	<input type="checkbox"/>	0	1	8/11/2021	PO generated for tender number 25 No of...
47	sp	8/11/2021	Archae Distribution	<input type="checkbox"/>	0	4	8/11/2021	PO generated for tender number 26 No of...
29	on	19/10/2021	Archae Distribution	<input type="checkbox"/>	0	2	19/10/2021	
17	sp	24/09/2021	Archae Distribution	<input type="checkbox"/>	1	1	24/09/2021	Tender tend for split orders No of PO Lines 1
7	sp	3/05/2021	Archae Distribution	<input type="checkbox"/>	0	1	3/05/2021	PO generated for tender number 1 No of...
6	sp	8/05/2021	Archae Distribution	<input type="checkbox"/>	0	2	8/05/2021	PO generated for tender number 1 No of...
5	on	25/07/2021	Archae Distribution	<input type="checkbox"/>	0	2	25/07/2021	
4	on	25/04/2021	Archae Distribution	<input type="checkbox"/>	0	8	25/04/2021	
2	on	19/05/2021	Montana Supplies	<input type="checkbox"/>	0	1	19/05/2021	
1	sp	13/04/2021	Montana Supplies	<input type="checkbox"/>	0	0		

14. Check **Finalise** order box.  
Click **OK**.

Edit Purchase order

Order num: 59 Name: Archae Distribution

Confirm date: 5/01/2022 Donor: Reference: Status: on

Requested delivery: 5/02/2022 Store: National Medicine

General Details Goods Received Supplier Invoices Log Location Custom data Documents

New line Delete lines Update EDD Print Confirm

Category: None

Alert: You will no longer be able to receive goods for this order if you choose to Finalise this order.

OK

Line	Item code	Item	Price Ext	Requested delivery date	Expected delivery...	Sto
1	amc500t	Amoxicillin 500mg tablet	150.00	5/02/2022		Na
2	met500t	Metformin 500mg tab	100.00	5/02/2022		Na

Supplier discount: Percentage: 0 Discount amount: 0.00

Estimated subtotal: 250.00

Estimated cost after discount: 250.00

☒ Finalise order

OK & Next Delete OK

## Session 4.15 Managing Outstanding Purchase Order Lines

mSupply can help you track and manage outstanding purchase order lines.

1. Navigate to the Suppliers tab  
Click **Outstanding Purchase Orders**



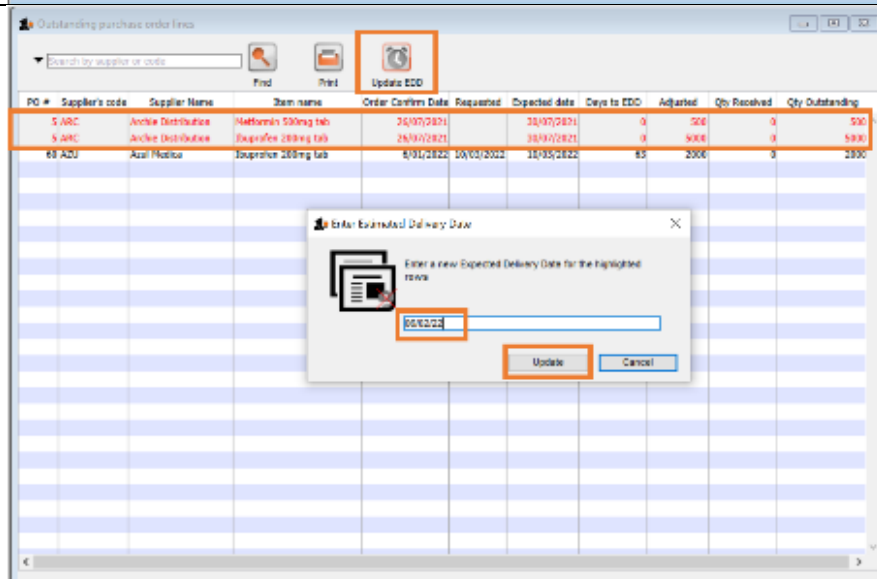
2. Lines in red show items that have not arrived by expected dates. Follow up required.  
Line in black show items that have an expected arrival date in the future. No follow up required.

Outstanding purchase order lines

Search by supplier or code: Find Print Update EDD

PO #	Supplier's code	Supplier Name	Item name	Order Confirm Date	Requested	Expected date	Days to EDD	Adjusted	Qty Received	Qty Outstanding
5 ARC	Arche Distribution	Halofenon 500mg tab	26/07/2021	30/07/2021	0	500	0	500	0	500
5 ARC	Arche Distribution	Suprofen 200mg tab	26/07/2021	30/07/2021	0	5000	0	5000	0	5000
60 AZU	Azal Medica	Suprofen 200mg tab	6/01/2022	10/03/2022	63	2000	0	2000	0	2000

3. To update the Estimated Delivery Date (EDD),  
1<sup>st</sup> method:  
Select affected line(s). Click the **Update EDD** button  
Enter **Estimated Delivery Date**.  
Click **Update**



4.  
2<sup>nd</sup> method:  
Double click on a red line to view original PO. Select affected line(s). Click the **Update EDD** button  
Enter **Estimated Delivery Date**.  
Click **Update**

Order name: 5 Name: Archie Distribution Status: on  
Confirm date: 26/07/2021 Donor: Reference: Store: National Medical  
Requested delivery: 30/07/21

General Details Goods Received Receipts Receipts Log Location Custom data Documents

New line Delete lines **Update EDD** Print Confirm

Show all lines Category: None Forex rate: 1

Line	Item code	Item	No. of packs	Pack size	Orig. Qty	Adj. Qty	Tot. received	Stock on hand	On Order	Cost. by/ods	Price Est.	Requested delivery date	Expected delivery	Sta
1	met500c	Metformin 500mg tab	500	1	500	500	0	7300	0	0	8.00	30/07/2021	31/07/20	Re
2	ibu200c	Ibuprofen 200mg tab	50	100	5000	5000	0	3900	0	0	8.00	30/07/2021	31/07/20	Re

Supplier discount: Percentage: 3 Class: ☐ Locked ☐ Auto odd usage ☐ Finalise order

Estimated subtotal: 8.00 Estimated cost after discount: 8.00

Buttons: Delete, OK

5. EDD updated. Red lines now black.

Outstanding purchase order lines

Search by supplier or code

Find

Print

Update EDD

PO #	Supplier's code	Supplier Name	Item name	Order Confirm Date	Requested	Expected date	Days to EDD	Adjusted	Qty Received	Qty Outstanding
5 ARC	Archie Distribution	Metformin 500mg tab		26/07/2021		6/02/2022	31	500	0	500
5 ARC	Archie Distribution	Ibuprofen 200mg tab		26/07/2021		6/02/2022	31	5000	0	5000
60 AZU	Azul Medica	Ibuprofen 200mg tab		6/01/2022	10/03/2022	10/03/2022	63	2000	0	2000



mSupply can help you keep track of payments made to suppliers.

**Supplier payment**

Name: Arche Distribution ARC Entered by: Martin Invoice No.: 0  
 Cheque #: Note Entered date: 6/01/2022 Status: nw  
 Confirm date: 6/01/2022 Store : National Medicine  
 Payment currency: AUD Currency rate: 1.00  
 Payment: 250.00  
 Distribute  
 Disabled lines below are in a different currency

Entry date	Confirm date	Invoice	Their ref	Comment	Total	Currency	Outstanding	Payment
5/01/2022	5/01/2022	27		Goods received ID : ?	250	AUD	250	0

Double-click lines to enter payment amount  
 Hold down shift to allocate whole invoice amount

Total outstanding 250.00  
 To allocate 250.00  
 Allocated 0.00  
 Allocated in local currency 0.00  
 Extra charges (USD) 0.00  
 Total payment in local currency 250.00

OK & Next Cancel OK

3. Review.  
Click **OK**.  
Check **Print** box to print.  
**Supplier payment is now complete!**

**Supplier payment**

Name: Archie Distribution ARC Entered by: Martin Invoice No.: 0  
 Cheque #: Entered date: 6/01/2022 Status: n/w  
 Note: Confirm date: 6/01/2022 Store: National Medical  
 Payment currency: AUD Currency rate: 1.00  
 Payment: 250.00  
 Distribute

Disabled lines below are in a different currency

Entry date	Confirm date	Invoice	Their ref	Comment	Total	Currency	Outstanding	Payment
5/01/2022	5/01/2022	27		Goods received ID : 7	250	AUD	250	250

Double-click lines to enter payment amount  
 Hold down shift to allocate whole invoice amount

Total outstanding: 250.00  
 To allocate: 0.00  
 Allocated: 250.00  
 Allocated in local currency: 250.00  
 Extra charges (USD): 0.00  
 Total payment in local currency: 250.00

OK & Next Cancel **OK**

4. To view past payments,  
Click **Payments List**

**mSupply navigator**

Customer **Suppliers** Item Reports Special Admin

Tenders Calculated Purchase orders Blank Outstanding Goods receiving

Suppliers Internal orders Supplier Invoices

Categories New credit Payments

Data File: DemoLand\_May2021\_466  
 National Medical Warehouse  
 Martin

**mSupply**

DEMO LAND  
 MINISTRY OF HEALTH

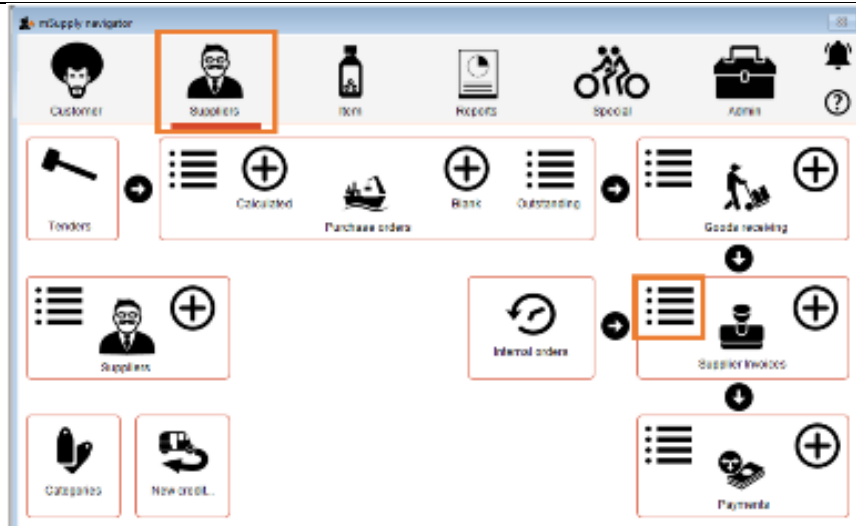
## Session 4.17 Return Goods to a Supplier (And Receive Credit)

There are 2 methods to do this.

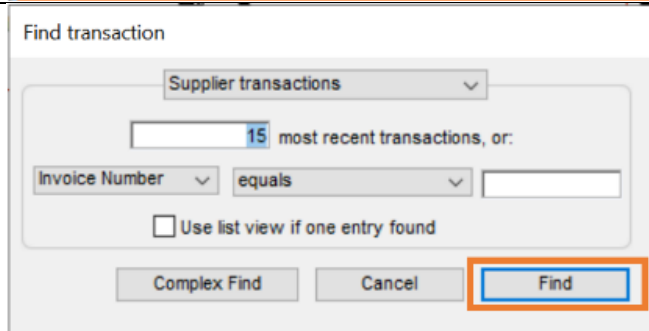
1<sup>st</sup> method:

**From a Finalised Supplier invoice**

1. Navigate to **Suppliers** tab  
Click **Supplier invoice List**

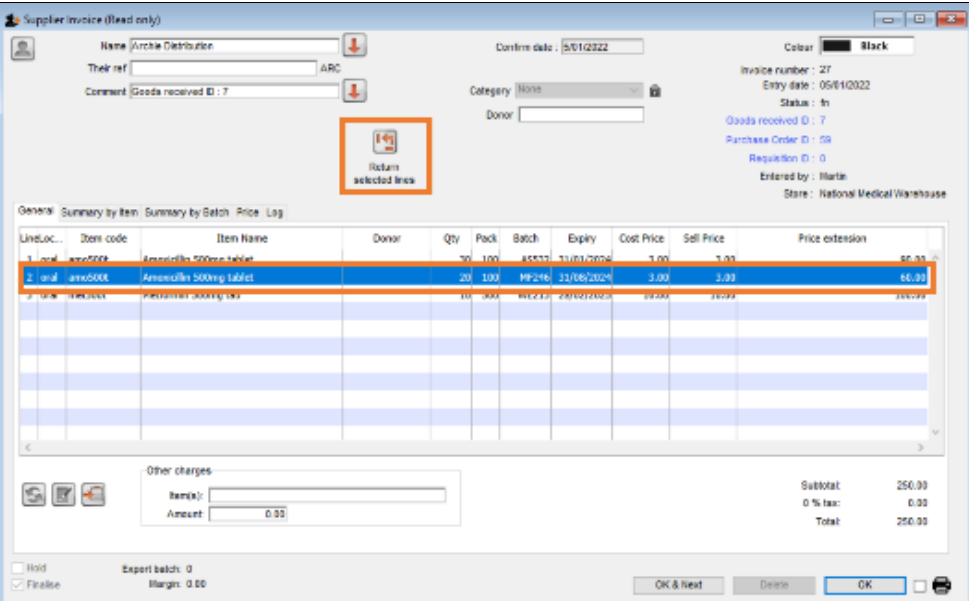
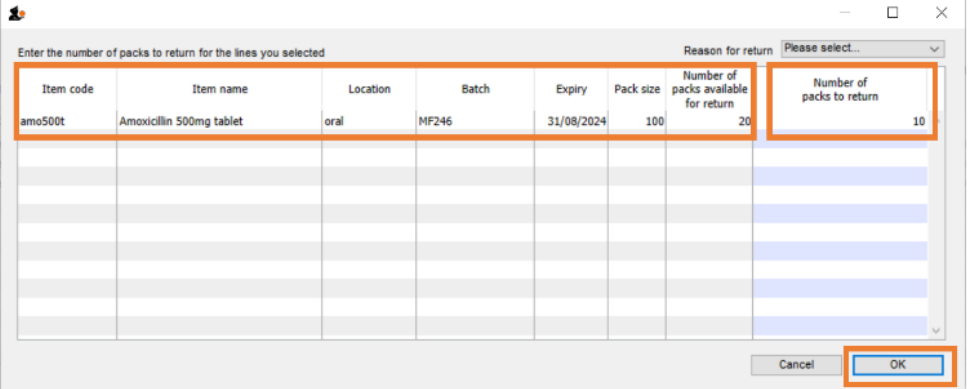
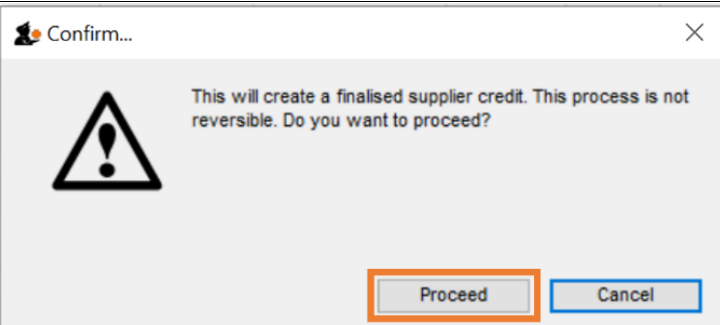
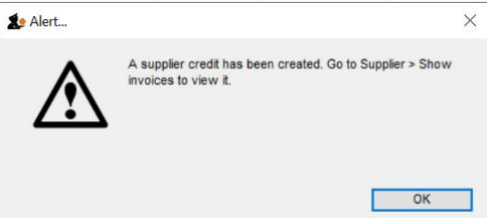
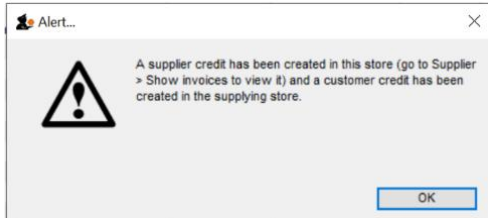
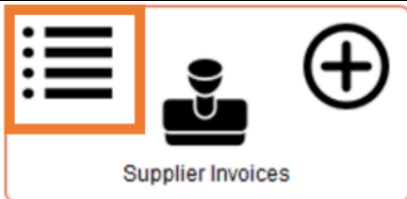


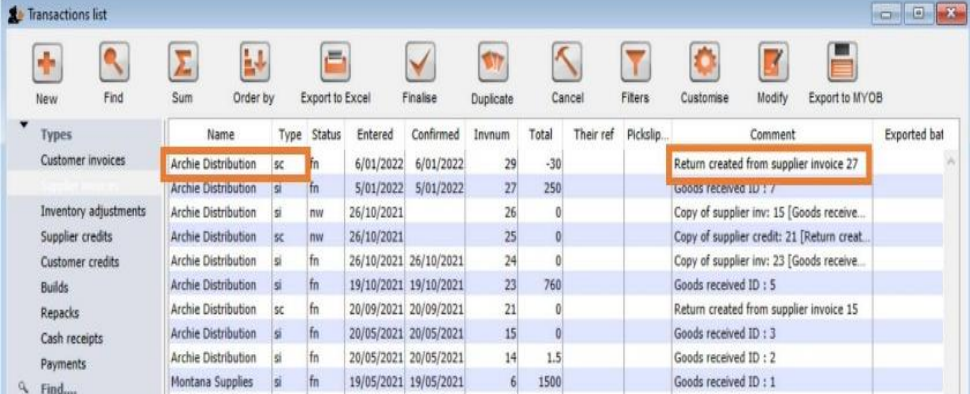

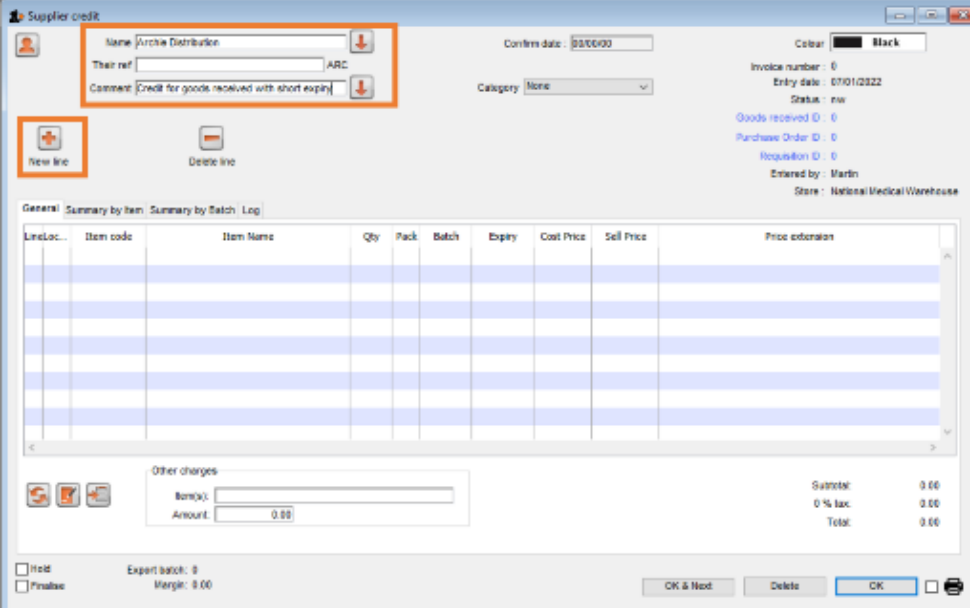
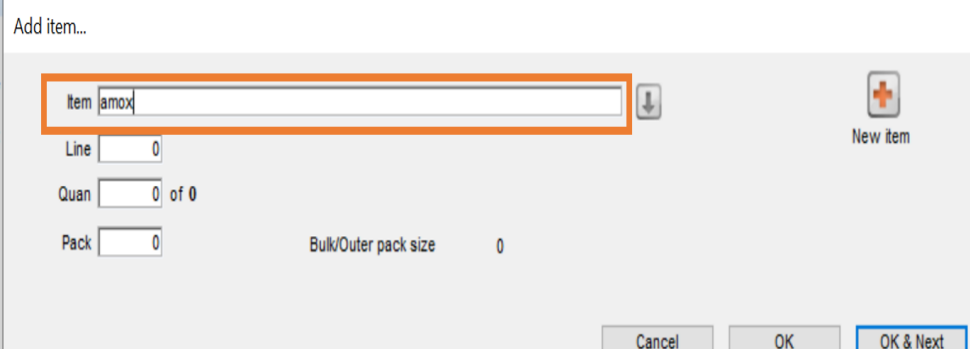
2. Apply search filters required.  
Click **Find**



3. Double click to open relevant invoice



Types	Name	Type	Status	Entered	Confirmed	Invoiced	Total	Their ref	Pickslip print	Comment	Exported batch
Customer invoices	Archie Distribution	si	fn	26/10/2021	26/10/2021	22	250			Goods received ID : 7	0
Inventory adjustments	Archie Distribution	sc	nw	26/10/2021		25	0			Copy of supplier inv: 15	0
Supplier credits	Archie Distribution	si	fn	26/10/2021	26/10/2021	24	0			Copy of supplier inv: 23	0
Customer credits	Archie Distribution	si	fn	19/10/2021	19/10/2021	23	760			Goods received ID : 5	0
Builds	Archie Distribution	sc	fn	20/09/2021	20/09/2021	21	0			Return created from su...	0
Repacks	Archie Distribution	si	fn	20/05/2021	20/05/2021	15	0			Goods received ID : 3	0
Cash receipts	Archie Distribution	si	fn	20/05/2021	20/05/2021	14	1.5			Goods received ID : 2	0
Payments	Montana Supplies	si	fn	19/05/2021	19/05/2021	6	1500			Goods received ID : 1	0
Find...	Azul Medica	si	fn	19/05/2021	19/05/2021	5	50				0
By date	Montana Supplies	si	fn	19/05/2021	19/05/2021	4	120				0
By status	Monty Meds	si	fn	19/05/2021	19/05/2021	3	220				0
My transactions											

<p>4. Select items you want to return. Click <b>Return selected lines</b></p>	 <table><tr><th>Line</th><th>Loc</th><th>Item code</th><th>Item Name</th><th>Donor</th><th>Qty</th><th>Pack</th><th>Batch</th><th>Expiry</th><th>Cost Price</th><th>Sell Price</th><th>Price extension</th></tr><tr><td>1</td><td>oral</td><td>amo500t</td><td>Amoxicillin 500mg tablet</td><td></td><td>20</td><td>100</td><td>MF246</td><td>31/08/2024</td><td>3.00</td><td>3.00</td><td>60.00</td></tr><tr><td>2</td><td>oral</td><td>amo500t</td><td>Amoxicillin 500mg tablet</td><td></td><td>10</td><td>100</td><td>MF246</td><td>31/08/2024</td><td>3.00</td><td>3.00</td><td>30.00</td></tr></table>	Line	Loc	Item code	Item Name	Donor	Qty	Pack	Batch	Expiry	Cost Price	Sell Price	Price extension	1	oral	amo500t	Amoxicillin 500mg tablet		20	100	MF246	31/08/2024	3.00	3.00	60.00	2	oral	amo500t	Amoxicillin 500mg tablet		10	100	MF246	31/08/2024	3.00	3.00	30.00
Line	Loc	Item code	Item Name	Donor	Qty	Pack	Batch	Expiry	Cost Price	Sell Price	Price extension																										
1	oral	amo500t	Amoxicillin 500mg tablet		20	100	MF246	31/08/2024	3.00	3.00	60.00																										
2	oral	amo500t	Amoxicillin 500mg tablet		10	100	MF246	31/08/2024	3.00	3.00	30.00																										
<p>5. Review. Enter <b>Number of packs to return</b>. Click <b>OK</b></p>	 <table><tr><th>Item code</th><th>Item name</th><th>Location</th><th>Batch</th><th>Expiry</th><th>Pack size</th><th>Number of packs available for return</th><th>Number of packs to return</th></tr><tr><td>amo500t</td><td>Amoxicillin 500mg tablet</td><td>oral</td><td>MF246</td><td>31/08/2024</td><td>100</td><td>20</td><td>10</td></tr></table>	Item code	Item name	Location	Batch	Expiry	Pack size	Number of packs available for return	Number of packs to return	amo500t	Amoxicillin 500mg tablet	oral	MF246	31/08/2024	100	20	10																				
Item code	Item name	Location	Batch	Expiry	Pack size	Number of packs available for return	Number of packs to return																														
amo500t	Amoxicillin 500mg tablet	oral	MF246	31/08/2024	100	20	10																														
<p>6. Click <b>Proceed</b> to confirm</p>	 <p>This will create a finalised supplier credit. This process is not reversible. Do you want to proceed?</p>																																				
<p>7. <b>Alert of new Supplier Credit created!</b> First message (if external customer) Second message (if internal customer)</p>	<div data-bbox="474 1485 962 1702"></div> <div data-bbox="984 1485 1473 1702"></div>																																				
<p>8. To view supplier credit,  Click <b>Supplier Invoices List</b></p>																																					

<p>9. Double click on <b>Supplier Credit</b> to view.</p>	
<p>2<sup>nd</sup> method: <b>Create a new Supplier Credit directly</b></p> <p>1. Navigate <b>Suppliers</b> tab Click <b>New credit</b></p>	
<p>2. Enter the <b>Name</b> of supplier Add <b>Their ref</b> details Add <b>Comment</b> Click <b>New line</b></p>	
<p>3. Search for item. Press <b>tab</b>.</p>	

- [illegible]

- Add item...

Item   amo500t  New Item

Line

Quan  of 4

Pack  Tab Bulk/Outer pack size 0

Line	Issue	Available	Tot in store	Pack	Hold	Batch	Expdte	Supplier	Donor	Location	Cost Price	Sell
1	0	4	4	100	<input type="checkbox"/>	SA222	28/02/2022	ARC		RED	120.00	^
2	0	50	50	1	<input type="checkbox"/>	AS	21/04/2022	MON		BLUE	1.00	
3	0	50	50	1	<input type="checkbox"/>	ABC123	28/02/2023			BLUE	50.00	
4	0	1	1	100	<input type="checkbox"/>	ASD10	28/02/2023	AZU		BLUE	20.00	
5	0	5	5	20	<input type="checkbox"/>	ASD10	28/02/2023	AZU		BLUE	4.00	v

< Total quantity issued 0 Total quantity available 4700 >

Cancel OK OK & Next

- [illegible]

7. You can view Supplier credit in your **Supplier Invoice List**

Transactions list

New Find Sum Order by Export to Excel Finalise Duplicate Cancel Filters Customise Modify Export to MYOB

Types	Name	Type	Status	Entered	Confirmed	Invnum	Total	Their ref	Picks	Comment	Exported b
Customer invoices	Archie Distribution	sc	fn	7/01/2022	7/01/2022	30	-480			Credit for goods received with short expiry	
	Archie Distribution	sc	fn	6/01/2022	6/01/2022	29	-30			Return created from supplier invoice 27	
Inventory adjustments	Archie Distribution	si	fn	5/01/2022	5/01/2022	27	250			Goods received ID : 7	
Supplier credits	Archie Distribution	si	nw	26/10/2021		26	0			Copy of supplier inv: 15 (Goods received ID...	
Customer credits	Archie Distribution	sc	nw	26/10/2021		25	0			Copy of supplier credit: 21 (Return created f...	
Builds	Archie Distribution	si	fn	26/10/2021	26/10/2021	24	0			Copy of supplier inv: 23 (Goods received ID...	
Repacks	Archie Distribution	si	fn	19/10/2021	19/10/2021	23	760			Goods received ID : 5	
Cash receipts	Archie Distribution	sc	fn	20/09/2021	20/09/2021	21	0			Return created from supplier invoice 15	
Payments	Archie Distribution	si	fn	20/05/2021	20/05/2021	15	0			Goods received ID : 3	
Find...	Archie Distribution	si	fn	20/05/2021	20/05/2021	14	1.5			Goods received ID : 2	
By date	Montana Supplies	si	fn	19/05/2021	19/05/2021	6	1500			Goods received ID : 1	



## Session 4.18 Cash Register

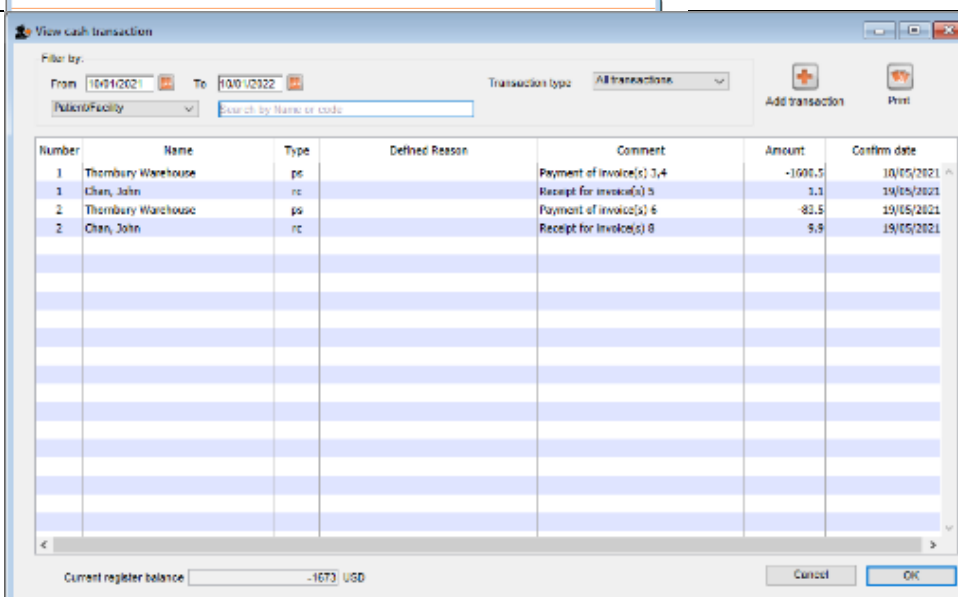
In previous units you have seen how you can record patient payments for prescriptions, receive customer payments and make supplier payments.

All of these transaction-related payments can be viewed in one place using the **Cash Register** module. If you are using a physical cash register, this module also allows you to manage cash reconciliations in your store.

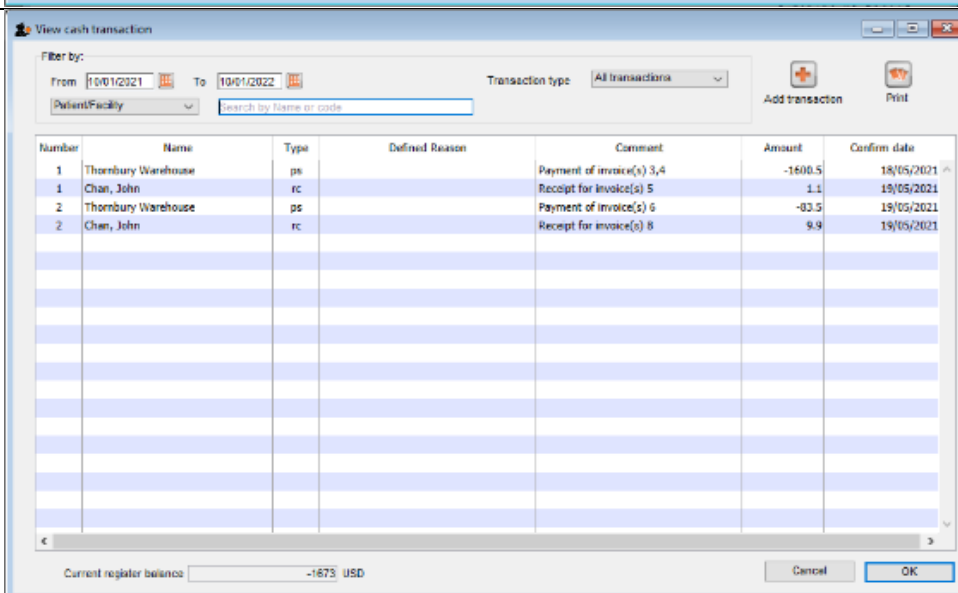
1. Navigate to **Special** tab  
Click **Cash Register**



2. The default view shows finalized transactions for the last year.



3. You can manually add **cash in** or take **cash out** from the cash register  
Click **Add transaction**



Enter **Name** of entity  
Select **Transaction type**  
Enter **Amount**  
Enter **Description**  
Click **OK**  
Click **Finalise**

4. The new transaction appears in cash register and the **Current register balance** will be updated

View cash transaction

Filter by:

From: 10/01/2021 To: 10/01/2022 Transaction type: All transactions

Patient/Facility: Search by Name or code

Number	Name	Type	Defined Reason	Comment	Amount	Confirm date
1	Thornbury Warehouse	ps		Payment of invoice(s) 3,4	-1600.5	18/05/2021
1	Chan, John	rc		Receipt for invoice(s) 5	1.1	19/05/2021
2	Thornbury Warehouse	ps		Payment of invoice(s) 6	-83.5	19/05/2021
2	Chan, John	rc		Receipt for invoice(s) 8	9.9	19/05/2021
3	Finance Department	rc		Reimbursement for supplier payments	2000	10/01/2022
3	Central Bank	ps		Weekly bank deposit	-227	10/01/2022

Current register balance: 100 USD

Buttons: Add transaction, Print, Cancel, OK

5. You can export to Excel.  
Then click **Print**

View cash transaction

Filter by:

From: 10/01/2021 To: 10/01/2022 Transaction type: All transactions

Patient/Facility: Search by Name or code

Buttons: Add transaction, Print

Number	Name	Type	Defined Reason	Comment	Amount	Confirm date
1	Thornbury Warehouse	ps		Payment of invoice(s) 3,4	-1600.5	18/05/2021
1	Chan, John	rc		Receipt for invoice(s) 5	1.1	19/05/2021
2	Thornbury Warehouse	ps		Payment of invoice(s) 6	-83.5	19/05/2021
2	Chan, John	rc		Receipt for invoice(s) 8	9.9	19/05/2021
3	Finance Department	rc		Reimbursement for supplier payments	2000	10/01/2022
3	Central Bank	ps		Weekly bank deposit	-227	10/01/2022

Excel Export:

Cash transactions: All transactions, Confirmed 10/01/2021 - 10/01/2022, Search term: @

Invoice Number	Name	Type	Option	Amount	Confirm date	Comment
1	Thornbury Warehouse	ps		-1600.5	18/05/2021	Payment of invoice(s) 3,4
1	Chan, John	rc		1.1	19/05/2021	Receipt for invoice(s) 5
2	Thornbury Warehouse	ps		-83.5	19/05/2021	Payment of invoice(s) 6
2	Chan, John	rc		9.9	19/05/2021	Receipt for invoice(s) 8
3	Finance Department	rc		2000	10/01/2022	Reimbursement for supplier payments
3	Central Bank	ps		-227	10/01/2022	Weekly bank deposit
Current register balance	100					

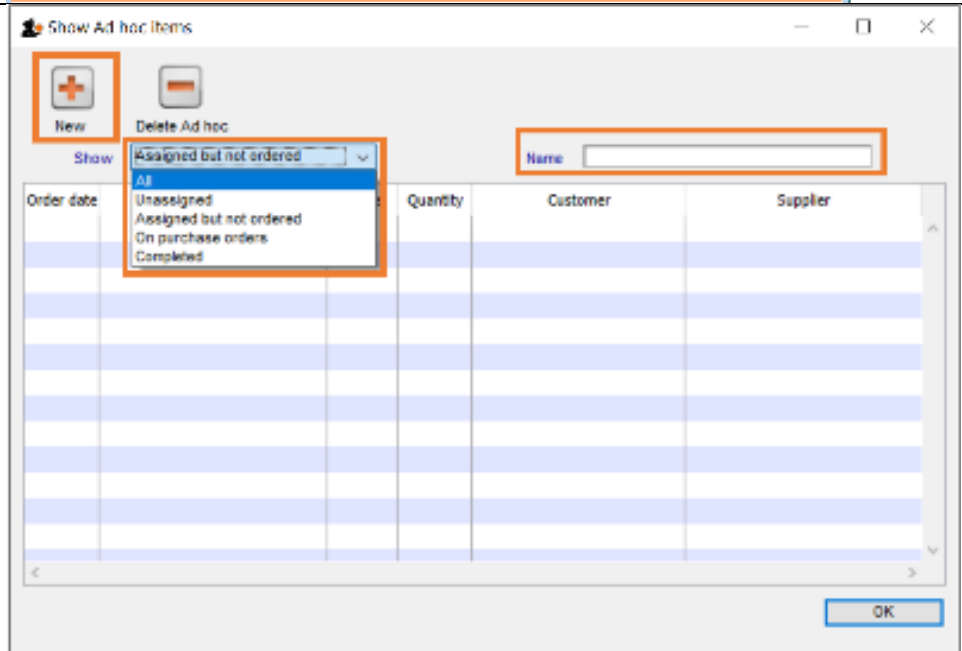
## Session 4.19 Ad Hoc Items

Occasionally you may need to order an item only once, for example a piece of specialist diagnostic laboratory equipment. This is an item you don't keep in stock and which will never be kept in stock. These items are managed in mSupply as Ad Hoc items.

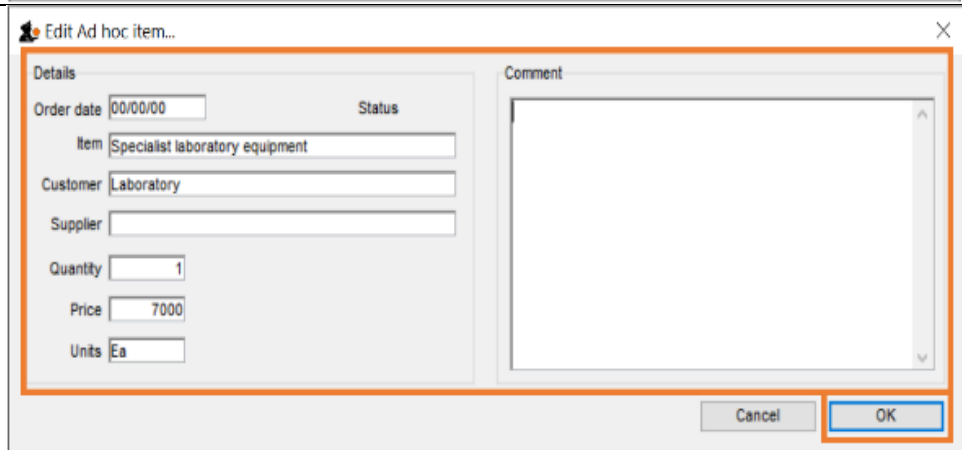
1. Navigate to **Item** tab  
Click **Add hoc items**



2. From this window, you view, add new items, delete items and edit existing items.  
Click Show to view status  
--un: Unassigned  
--as: Assigned but not ordered  
--po: On purchase orders  
--fn: Completed  
Click **Name** to search for a customer or supplier  
Click **New** to add a new item



3. Enter details of Ad hoc item (**Customer, Supplier, Quantity, Price, Units Comment**)  
Click **OK**



- [illegible]

- [illegible]

- 
- Edit Purchase order**
- Order num: 01      Name: Azzil Medica      Status: ag      Store: National Medic
- Confirm date: 03/06/00      Dealer:      Reference:      Status: ag
- Requested delivery: 03/06/00      Store: National Medic
- General**   Details   Goods Received   Supplier Invoices   Log   Location   Custom data   Documents   Ad Hoc Items
- New line   
 Delete line   
 Update FOD   
 Print   
 Confirm   
 Category: None   
 Info
- Show all lines      Currency: AUD      Forex rate: 1
- | Line | Item code | Item                            | No. of packs | Pack size | Orig. Qty | Adj. Qty | Tot. received | Stock on hand | On Order | Cost, by/dts | Price Est | Requested delivery date | Expected delivery | Sta |
|------|-----------|---------------------------------|--------------|-----------|-----------|----------|---------------|---------------|----------|--------------|-----------|-------------------------|-------------------|-----|
| 1    | NSI       | Specialist laboratory equipment | 1            | 1         | 1         | 1        | 0             | 0             | 0        | 0            | 5,000.00  |                         |                   | Ne  |
- Supplier discount
- Percentage: 0      Discount amount: 0.00      Estimated subtotal: 0.00      Estimated cost after discount: 0.00
- ☐ Locked      ☐ Auto calc usage
- Finalise order      OK & Next      Delete      OK

- When your supplier sends you the ad hoc item, you create a goods receipt and supplier invoice.

Once you finalise the supplier invoice, you automatically create a customer invoice for the customer.

Supplier Invoice

Name: J. J. J. J. Trade ref: AZU Confirm date: 06/05/06 Category: None Denom:

Invoice number: 28 Entry date: 1/1/1/2022 Status: new Goods received ID: 1 Purchase Order ID: 61 Revision ID: 0 Created by: Martin Store: National Medical Warehouse

Buttons: New line, Add items from requisition, Delete line

Line item	Item code	Item Name	Order	Qty	Pack	Batch	Copy	Cost Price	Sell Price	Price extension
1	151	Specialist laboratory equipment		1	1			5,000.00	5,000.00	5,000.00

Alert: Customer invoices have been created for this stock item. Please remove it by choosing Customer (Show invoices...)

Other charges: Item(s): Amount: 0.00

Subtotal: 5,000.00  
0% tax: 0.00  
Total: 5,000.00

Buttons: OK & Next, Delete, OK

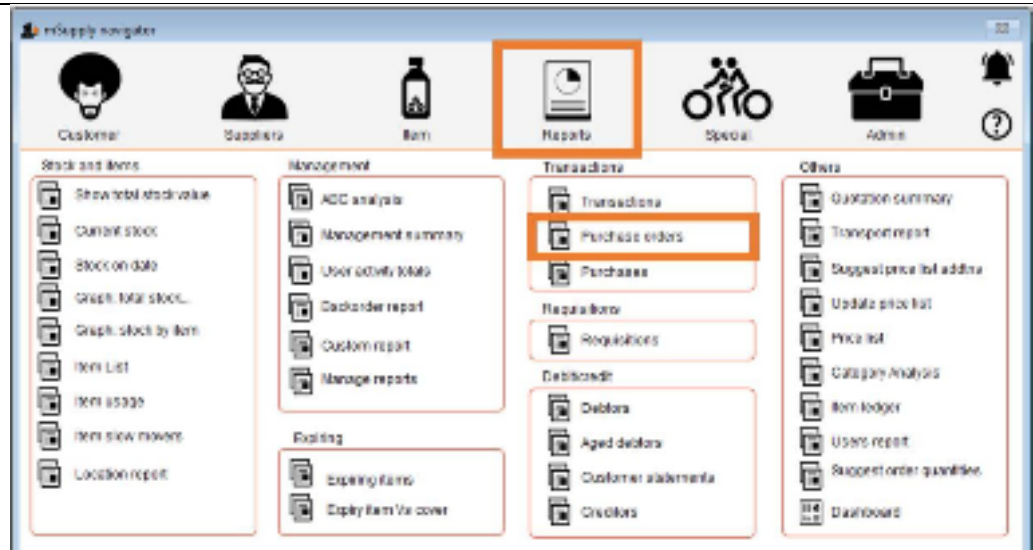
## Session 4.20 Reports: Purchase Orders

There are a number of Purchase Order reports available in mSupply.

**To generate the reports,**

Navigate to **Reports** and click **Purchase orders**

Enter filters and click **OK**



### 1. Ordered Item Report!

You can see what has been ordered, what has arrived, what is yet to arrive and how much it all costs.

Ordered Item Report Creation date : 25/01/2021 to 25/01/2022 Store : National Medical Warehouse Status is cn & fn																			
Store Name	PO No.	Status	Supplier Name	Item Code	Item Description	Confirm Date	Sent Date	RDD	EDO	Pack Size	Packs Ordered (Orig.)	Qty Ordered (Orig.)	Packs Ordered (Adj.)	Qty Ordered (Adj.)	Packs Rcvd	Qty Rcvd	Packs outst'g	Qty outst'g	Price Per Pack
National Medical Warehouse	29	cn	Archie Distribution	312	amoxicillin 250mg/5mL suspension	19/10/2021	19/10/2021	20/10/2021	20/10/2021	100	10	1,000	10	1,000	10	1,000	0	0	6.00
National Medical Warehouse	29	cn	Archie Distribution	313	paracetamol 250mg/5mL suspension	19/10/2021	19/10/2021	20/10/2021	20/10/2021	100	100	10,000	100	10,000	100	10,000	0	0	7.00
National Medical Warehouse	61	cn	Azul Medica	NSI	Non stock items	11/01/2022	11/01/2022	00/00/00	00/00/00	1	1	1	1	1	0	0	1	1	5,000.00
National Medical Warehouse	60	cn	Azul Medica	ibu200	Duoprofen 200mg tab	6/01/2022	6/01/2022	10/03/2022	10/03/2022	100	20	2,000	20	2,000	0	0	20	2,000	40.00
National Medical Warehouse	29	cn	Archie Distribution	amo500	Amoxicillin 500mg tablet	5/01/2022	5/01/2022	5/02/2022	00/00/00	100	50	5,000	50	5,000	50	5,000	0	0	3.00
National Medical Warehouse	29	cn	Archie Distribution	me500	Metformin 500mg tab	5/01/2022	5/01/2022	5/02/2022	00/00/00	500	10	5,000	10	5,000	10	5,000	0	0	10.00

### 2. Goods Received Date vs Delivery Date report!

These reports can help you track supplier performance and lead time.

Goods Received date vs Order date-Show Delivery Days Creation date : 27/01/2021 to 27/01/2022 Store : National Medical Warehouse									
Name	Order no.	Stat	Date Confirmed	Lines in PO	Date goods rec'd	Item Name	Quantity	Delivery Method	Lead Time (Days)
Montana Supplies	3	cn	19/05/2021	1	19/05/2021	Amoxicillin 500mg tab	500		0
Archie Distribution	4	fn	20/05/2021	3	20/05/2021	Amoxicillin 500mg tab	5		42
Archie Distribution	4	fn	20/05/2021	3	20/05/2021	Metformin 500mg tab	50		42
Archie Distribution	4	fn	20/05/2021	3	20/05/2021	Metformin 500mg tab	50		42
Archie Distribution	4	fn	20/05/2021	3	20/05/2021	Paracetamol 500mg tab	500		0
Archie Distribution	29	cn	19/10/2021	2	19/10/2021	amoxicillin 250mg/5mL suspension	10		1
Archie Distribution	29	cn	19/10/2021	2	19/10/2021	paracetamol 250mg/5mL suspension	92		1
Archie Distribution	29	cn	19/10/2021	2	19/10/2021	paracetamol 250mg/5mL suspension	8		1
Archie Distribution	59	cn	5/01/2022	2	5/01/2022	Amoxicillin 500mg tablet	30		5
Archie Distribution	59	cn	5/01/2022	2	5/01/2022	Amoxicillin 500mg tablet	20		5
Archie Distribution	59	cn	5/01/2022	2	5/01/2022	Metformin 500mg tab	10		5
Azul Medica	61	cn	11/01/2022	1	11/01/2022	Specialist laboratory equipment	1		0

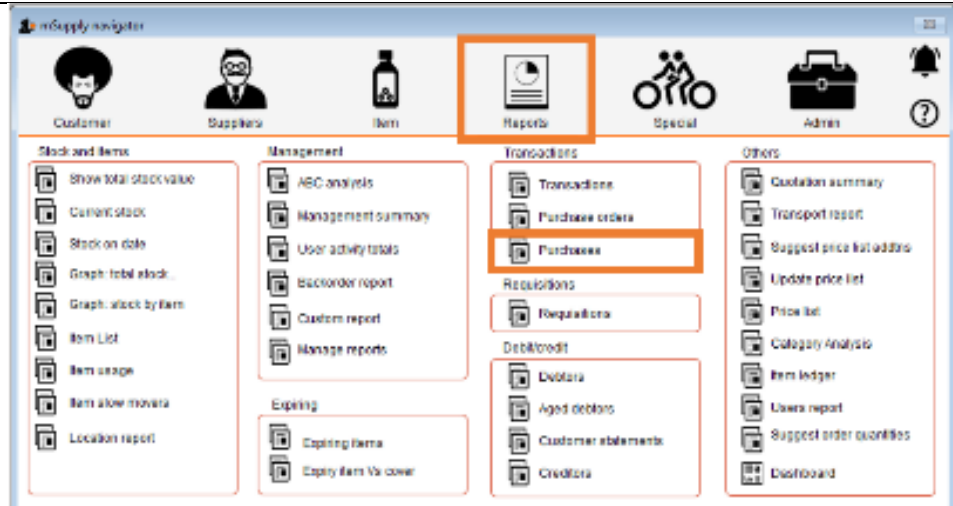
<b>3. Outstanding purchase order lines report!</b>  This report can be used to track when stock is expected to arrive as well as follow up on late deliveries.	Outstanding purchase order lines Creation date : 28/01/2021 to 28/01/2022 Store : National Medical Warehouse																		
	Order Num	Name status	Name code	item code	item	Confirm date	po sent date	Requested delivery date	Delivery date expected	Org pack size	Adj quan order	quan received	Outstand ing	exp unit price	exp price extension	curr	Price ext (local)		
	5	cn	ARC	Archie Distribution	met500t 500mg tab	26/07/21	26/07/21	30/07/21	06/02/22	1	500	500	0	500	1	500	USD1	500	
	5	cn	ARC	Archie Distribution	ibu200t 200mg tab	26/07/21	26/07/21	30/07/21	06/02/22	100	5000	5000	0	5000	10	500	USD1	500	
	60	cn	AZU	Azul Medica	ibu200t 200mg tab	06/01/22	06/01/22	10/03/22	10/03/22	100	2000	2000	0	2000	2	40	AUD1	40	
	61	cn	AZU	Azul Medica	NSI Specialist laboratory equipment	11/01/22	11/01/22	10/03/22	10/03/22	1	1	1	0	1	5000	5000	AUD1	5000	
	Grand Total																		5140
	Purchase order vs good received broken down by batches																		
	Code	Item	Units	Order Id	Pack	Quantity	Date Ordered	Remaining Incl. Pack	Received Date	Received Batch	Received Expiry	Received Pack	Received Qty						
	amo500t	Amoxicillin 500mg tablet	each	3	1	500	19/05/2021	0	19/05/2021	AS111	31/01/2022	1	500						
<b>4. Purchase order vs goods received broken down by batches report!</b>  This report shows the date particular batches were received.	amo500t	Amoxicillin 500mg tablet		4	100	5	20/05/2021	0	1/07/2021	SA222	28/02/2022	100	5						
	par500t	Paracetamol 500mg tab		4	1	1000	20/05/2021	0	20/05/2021	AA22	28/02/2023	1	500						
									20/05/2021	AA22	28/02/2023	1	500						
	met500t	Metformin 500mg tab		4	1	100	20/05/2021	0	1/07/2021	SA111	31/01/2023	1	50						
									1/07/2021	BS111	31/01/2022	1	50						
	met500t	Metformin 500mg tab		5	1	500	26/07/2021	300	28/01/2022	BM432	29/02/2024	1	200						
	ibu200t	Ibuprofen 200mg tab		5	100	50	26/07/2021	5000											
		312 amoxicillin 250mg/5mL suspension	mL	29	100	10	19/10/2021	0	20/10/2021	AM312	28/02/2023	100	10						
		313 paracetamol 250mg/5mL suspension	mL	29	100	100	19/10/2021	0	20/10/2021	ACE2411	4/11/2022	100	92						
									20/10/2021	BA2544	31/01/2023	100	8						
	NSI	Specialist laboratory equipment	Ea	61	1	1	11/01/2022	0	11/01/2022		00/00/00	1	1						
	ibu200t	Ibuprofen 200mg tab	Tab	60	100	20	6/01/2022	2000											
	amo500t	Amoxicillin 500mg tablet	Tab	59	100	50	5/01/2022	0	10/01/2022	AS532	31/01/2024	100	30						
									10/01/2022	MF246	31/08/2024	100	20						
	met500t	Metformin 500mg tab	Tab	59	500	10	5/01/2022	0	10/01/2022	WE213	28/02/2025	500	10						



## **Session 4.21 Reports: Purchases**

A Purchases Report finds all purchasing transactions over a given value within a specified time period. If you have a purchasing policy that stipulates purchases over a certain amount require authorization by a second party, this report helps you monitor such a policy easily.

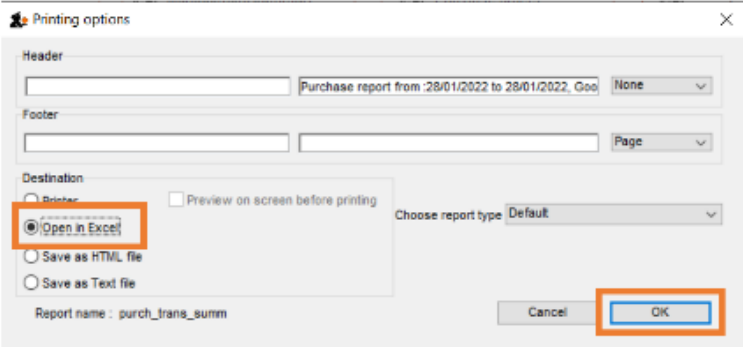
1. Navigate to **Reports** tab.  
Click **Purchases**



2. Select date range and filters  
Click **OK**  
Select **Open in Excel** and click **OK**

The screenshot shows the 'Purchase report options' dialog box. It has a title bar with the mSupply logo and the text 'Purchase report options'. The dialog contains several sections: 'Type of report' with a dropdown menu set to 'General purchase report'; 'Date Range' with 'From' and 'To' date pickers set to '28/01/2022' and a 'Today' button; 'Report on names whose...' with a dropdown set to 'Name' and a 'contains' operator; 'Report on items whose...' with multiple criteria including 'Item code' (starts with), 'Category 1' (is), 'VEN Category' (Don't Care), 'Department is' (Don't Care), and 'is on Master List' (Don't Care); and 'Value greater than...' with a text input field set to '0'. At the bottom right, there are 'Cancel' and 'OK' buttons, with the 'OK' button highlighted by an orange box.

### 3. Purchases Report!



The 'Printing options' dialog box shows the 'Open in Excel' option selected under the 'Destination' section. The 'Header' field contains 'Purchase report from :28/01/2022 to 28/01/2022, Goods Price=> D Store: National Medical Warehouse, for store(s) National Medical Warehouse'. The 'Report name' is 'purch\_trans\_summ'. The 'OK' button is highlighted.

Invoice Num	Name	Code	Item Name	Quan	Pack Size	Cost Price	Price Exten
3	Monty Meds	MonM	Paracetamol 500mg tab	200	1	1	200
4	Montana Supplies	MON	Amoxicillin 500mg tablet	100	1	1	100
5	Azul Medica	AZU	Amoxicillin 500mg tablet	2	100	20	40
6	Montana Supplies	MON	Amoxicillin 500mg tablet	500	1	1	500
6	Montana Supplies	MON	Metformin 500mg tab	2000	1	0.5	1000
14	Archie Distribution	ARC	Amoxicillin 500mg tablet	5	100	0.3	1.5
23	Archie Distribution	ARC	amoxicillin 250mg/5mL suspension	10	100	6	60
23	Archie Distribution	ARC	paracetamol 250mg/5mL suspension	92	100	7	644
23	Archie Distribution	ARC	paracetamol 250mg/5mL suspension	8	100	7	56
27	Archie Distribution	ARC	Amoxicillin 500mg tablet	30	100	3	90
27	Archie Distribution	ARC	Amoxicillin 500mg tablet	20	100	3	60
27	Archie Distribution	ARC	Metformin 500mg tab	10	500	10	100
32	Archie Distribution	ARC	Metformin 500mg tab	200	1	1.5	300
Grand Total of Price Exten							3151.5

## Session 4.22 Reports: Debit/Credit

mSupply can generate Debit or Credit reports. These are easy to create, just click on the desired report and enter the required fields- you can test these on real systems.

Navigate to **Reports**. Select the **Debit/Credit** reports you wish to create, then follow the prompts, select **Export to Excel** to view report.



The mSupply navigator interface shows the 'Reports' icon highlighted in the top navigation bar. The 'Debit/Credit' section is also highlighted, showing options for Debtors, Aged debtors, Customer statements, and Creditors.



#### 4. Creditors Report

Shows all the amounts your store owes to creditors or suppliers.

Creditors listing				
Name	Code	Invoice Number	Confirm Date	Amount Outstanding
Archie Distribution	ARC	32	28/01/2022	300
			Subtotal	300
Azul Medica	AZU	28	11/01/2022	5000
			Subtotal	5000
Montana Supplies	MON	6	19/05/2021	1500
			Subtotal	1500
Monty Meds	MonM	3	19/05/2021	200
			Subtotal	200
			TOTAL	7000

## Session 4.23 Reports: Quotation Summary

You can generate a Quotation Summary Report to review quotations for items by suppliers. A Quotation Summary Report can be useful to help review historical quotations for items as well as reviewing current quotations for future Purchase Orders.

Navigate to  
**Reports**  
Click **Quotation summary**

Enter filters and  
Click **OK**



**Quotation Summary Report**

Quotation summary									
Item code	Item Name	Supplier Name	Code	Edit Date	Currency	Price	Preferred	Unit Qty	Adj Cost
amo500t	Amoxicillin 500mg tablet	Monty Meds	MonM	09/11/21	AUD	2	True	100	0.01
amo500t		Azul Medica	AZU	14/01/22	USD	0.5	False	1	0.5
amo500t		Archie Distribution	ARC	14/01/22	AUD	0.5	False	1	0.36
amo500t		Azul Medica	AZU	08/11/21	AUD	2	False	1	1.45
amo500t		Montana Supplies	MON	09/11/21	AUD	1.5	False	20	0.05
cefx250i	Ceftriaxone 250mg injection	Monty Meds	MonM	06/12/21	AUD	5	False	10	3.64
cefx250i		Montana Supplies	MON	06/12/21	AUD	0.46	True	1	3.34
cefx250i		Azul Medica	AZU	06/12/21	AUD	6.85	False	10	4.98
ibu200t	Ibuprofen 200mg tab	Monty Meds	MonM	09/11/21	AUD	4	False	100	2.91
ibu200t		Montana Supplies	MON	09/11/21	AUD	0.8	False	10	5.82
ibu200t		Archie Distribution	ARC	14/01/22	AUD	1	False	1	72.8
ibu200t		Azul Medica	AZU	09/11/21	AUD	4	True	100	2.91
met500t	Metformin 500mg tab	Archie Distribution	ARC	09/11/21	AUD	15	False	500	0.02
met500t		Azul Medica	AZU	09/11/21	AUD	2	False	50	0.02
met500t		Monty Meds	MonM	09/11/21	AUD	5	False	90	0.04
met500t		Montana Supplies	MON	09/11/21	AUD	0.8	False	1	0.58
met500t		Azul Medica	AZU	09/11/21	AUD	3	False	20	0.1
par500t	Paracetamol 500mg tab	Montana Supplies	MON	09/11/21	AUD	3	False	20	0.1

## Session 4.24 Reports: Transport

A Transport report allows you to view information about the transport details for orders you have dispatched from your store.

**Note:** This is only relevant if you are entering this information into the **Transport details** tab of each **Customer Invoice** otherwise nothing will appear in your report.

The screenshot shows the 'Customer invoice' window. The 'Transport details' tab is highlighted with an orange box. The form includes fields for Name (Thornbury Warehouse), Their ref (TWH), Comment, Confirm date (00/00/00), Category (None), Colour (Black), Invoice number (27), Entry date (3/06/2022), Goods received ID (0), Status (sg), Entered by (Martin), and Store (National Medical Warehouse). Below these are tabs for General, Summary by Item, Summary by Batch, and Transport details (selected). The Transport details tab contains fields for Order written date, Order received date (00/00/00), Ship date (3/02/2022), Ship method (Ship), Expected arrival date (00/00/00), Actual arrival date (00/00/00), Responsible officer (None), and buttons for Manage boxes, Box selected, and Unbox. A table lists items with columns: Line, Location, Item Name, Quan, Pack Size, Batch, Weight, Exp date, Sell Price, and Boxes. The first row shows '1 BLUE Amoxicillin 500mg tablet' with a quantity of 2000, pack size of 1, batch of A5, weight of 2000, and expiry date of 21/04/2022. The total item weight is 2000. At the bottom, there is a 'Print labels' button, a 'Stock transfer' label, and 'OK & Next', 'Delete', and 'OK' buttons.

Line	Location	Item Name	Quan	Pack Size	Batch	Weight	Exp date	Sell Price	Boxes
1	BLUE	Amoxicillin 500mg tablet	2000	1	A5	2000	21/04/2022	1.00	

1. Navigate to Reports  
Click **Transport report**

The screenshot shows the 'mSupply navigator' interface. The 'Reports' icon is highlighted with an orange box. Below the navigation bar, there are four main sections: Stock and Items, Management, Transactions, and Others. The 'Transport report' option is highlighted with an orange box in the 'Others' section. Other options in the 'Others' section include Quotation summary, Suggest price list address, Update price list, Price list, Category Analysis, Item ledger, Users report, Suggest order quantities, and Dashboard.

2. Add filters. Click **OK**

**Transport report**

Date range  
 From 01/01/2022 To 31/01/2022 Today

Report on names whose...  
 Name contains

Search Criteria  
 Responsible Officer All  
 Ship Method All

Cancel OK

3. **Transport Report!**

Transport report 01/01/2022 to 31/01/2022										
					Estimated	Actual Arrival	Arrival Day	Responsible		
Code	Name	Confirm Date	Inv Num.	Ship Date	Arrival Date	Date	diff.	Officer	Ship meth	Ship Address1
Lab	Laboratory	11/01/22	21	11/01/22	21/01/22	25/01/22	-4	Martin	Land - road	
TWH	Thornbury Warehouse	24/01/22	22	24/01/22	31/01/22	31/01/22	0	Martin	Ship	



## Session 4.25 Reports: Price List

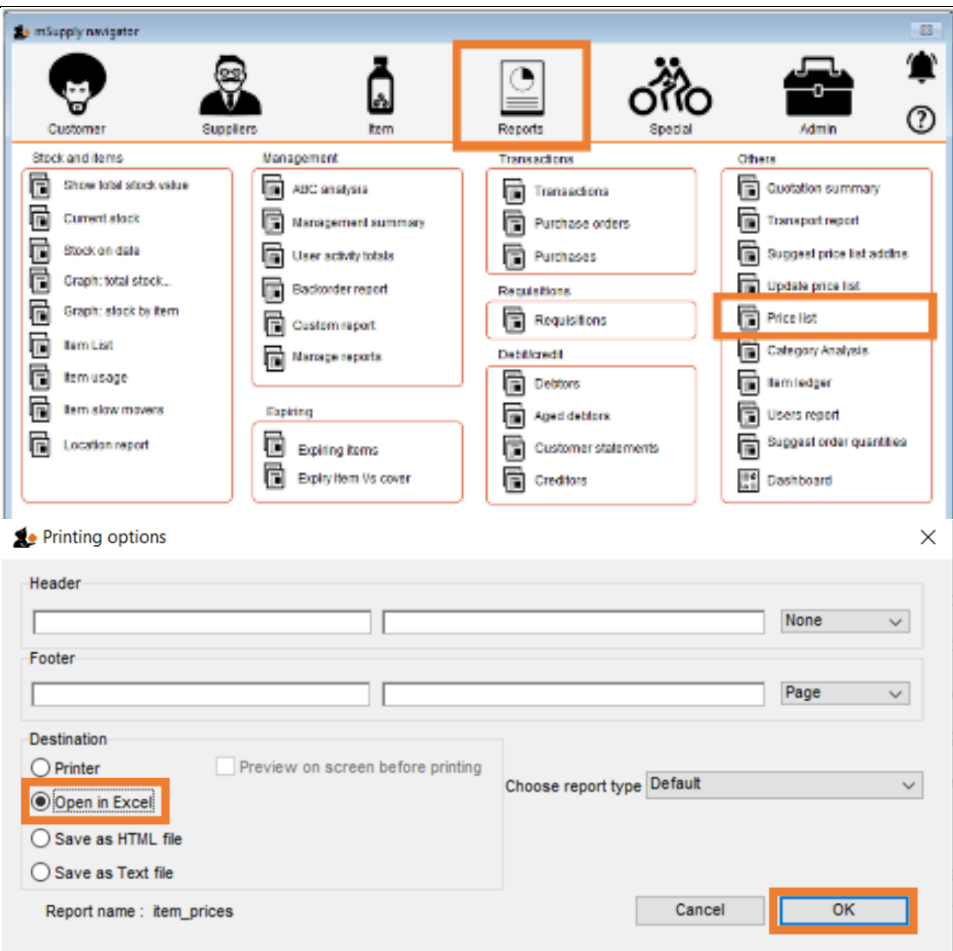
**Note:** You can generate a Price List for items if you have ticked the **On price list** checkbox under the **Misc** tab for each item.

Item details window for 'Amoxicillin 500mg tablet'. The 'Misc' tab is selected. The 'Price list' section shows the 'On price list' checkbox checked, 'Catalogue price' set to 5, and 'Catalogue pack size' set to 500.

1. Navigate to **Reports** and click **Update price list**

Select options and click **OK**

mSupply navigator showing the 'Reports' icon highlighted. Below, the 'Update price list' option is highlighted in the 'Others' section. A 'Report options' dialog is open, showing 'the price of the highest priced batch in stock' selected.

<div>2. Navigate to <b>Reports</b> and click <b>Price list</b></div> <div>Select <b>Open in Excel</b> and click <b>OK</b></div>	<div></div>												
<div>Item Price List Report</div>	<table><tr><th colspan="3">Item Price List</th></tr><tr><th>item name</th><th>Report Qty</th><th>Indic Price</th></tr><tr><td>amoxicillin 250mg/5mL suspension</td><td>100</td><td>2</td></tr><tr><td>Amoxicillin 500mg tablet</td><td>500</td><td>5</td></tr></table>	Item Price List			item name	Report Qty	Indic Price	amoxicillin 250mg/5mL suspension	100	2	Amoxicillin 500mg tablet	500	5
Item Price List													
item name	Report Qty	Indic Price											
amoxicillin 250mg/5mL suspension	100	2											
Amoxicillin 500mg tablet	500	5											

## **Legacy 1 Knowledge Check**

1. Which of the following is TRUE about mSupply?
  - a) If your internet connection is interrupted, all your work will be lost
  - b) It requires a constant internet connection to work
  - c) It doesn't require the internet at all
  - d) It requires an internet connection at least occasionally, for orders to be sent and received
2. Arrange the following items in the correct order to show the process of ordering and receiving stock in mSupply:
  - a) Finalise the Supplier invoice
  - b) Finalise the Internal order to send it to your Supplier
  - c) Create a new Internal order
  - d) Open the Supplier invoice and confirm all details are correct
  - e) Wait for your stock to arrive
3. To order stock from another facility using mSupply, create a/an..
  - a) Customer invoice
  - b) Internal order
  - c) Purchase order
  - d) Supplier invoice
4. You have just received a delivery. You open the supplier invoice and notice that there is an error as the number of ceftriaxone injections received does not match the number on the supplier invoice. What should you do?
  - a) You don't need to do anything because it is a small discrepancy of only 10 injections
  - b) Nothing as you cannot edit any details on the supplier invoice
  - c) Double click the ceftriaxone line to edit the Received quantity
  - d) Double click the ceftriaxone line and override the original sent quantity
5. The \_\_\_\_\_ tab is used to order and receive stock while the \_\_\_\_\_ tab is used to issue stock.
  - a) Supplier, Customer
  - b) Supplier, Supplier
  - c) Customer, Supplier
6. When do you need to enter a transaction in mSupply?
  - a) Every time you receive or issue stock, with no exceptions
  - b) Only when you dispense stock to your regular customers
  - c) Whenever you receive or issue stock, except for donated supplies
  - d) Only when you receive stock from your regular supplier
7. Who can edit user permissions?
  - a) Administrators
  - b) mSupply Support Desk only
  - c) Nobody
  - d) Anyone
8. When you add an item to an Internal order, mSupply will calculate the quantity it thinks you should order. You must order the quantity that mSupply suggests
  - a) True
  - b) False

9. When should you finalise an internal order?
- a) When you are ready to send the order to your supplier
  - b) Never
  - c) When you are ready for another user at your facility to check it
  - d) After the stock is received
10. Which of the following cannot be edited?
- a) cn
  - b) fn
  - c) nw
  - d) sg
11. Arrange the following items in the correct order to show the process for receiving stock from another facility that uses mSupply: \_\_\_\_\_
- a) Click OK
  - b) Confirm the invoice details match the actual stock received
  - c) Navigate to the Supplier tab
  - d) Uncheck the Hold box, and check the Finalise box
  - e) Click the Supplier invoices list button
12. Arrange the following items in the correct order to show the process for ordering stock from another facility using mSupply: \_\_\_\_\_
- a) Click the Internal order button
  - b) Add the items you want to order, specifying the quantity for each
  - c) Navigate to the Supplier tab
  - d) Click OK
  - e) Check the Finalise box

### ***Legacy 2 Knowledge Check***

13. When should you add a new patient to mSupply?
- a) After checking the patient isn't already in mSupply
  - b) Every time you dispense a prescription
14. When a customer places an internal order, this arrives at the supplying store as a:
- a) Requisition
  - b) Customer invoice
  - c) Supplier invoice
  - d) Purchase order
15. Arrange the following steps to show the correct process for entering a prescription: \_\_\_\_\_
- a) Enter the patient's name, prescriber and prescription date
  - b) Check the print box and click OK
  - c) Click the New prescription button
  - d) Prepare the items and attach the dispensing labels
  - e) Reopen the prescription, process the payment (if applicable), and Finalise it
  - f) Add the items to the prescription, including the quantity and directions for use

16. Arrange the following items to show the correct procedure for processing an order from a customer that uses mSupply:
- Create a customer invoice and print a picking slip
  - Enter the quantities you will supply
  - The delivery is dispatched from your facility
  - Pick the stock and get it ready for delivery
  - Finalise the customer invoice
  - Confirm the customer invoice
  - View and assess the requisition
17. Why are all the items on this customer invoice red?
- All available stock is expired
  - Specific stock has not been allocated to each item line yet
  - The customer invoice is finalised and cannot be edited
  - Stock has already been issued to the customer

**Customer invoice**

Name: Korang Hospital  
 Ther ref: KRD  
 Comment: Invoice from requisition  
 Confirm date: 05/09/00  
 Category: None  
 Colour: Black  
 Invoice #: 0  
 Entry date: 19/02/2001  
 Goods received ID: 0  
 Status: exp  
 Entered by: Helen  
 Store: National Medical Warehouse

Buttons: New line, Delete line(s), Backorders, History, Confirm

Tabs: General, Summary by item, Summary by Batch, Transport details, Log



Item	Line	Location	Item code	Item Name	Quan	Pack/SL	Batch	Exp date	Sell Pri	Price exten
1			cef250i	Ceftriaxone 250mg inj	300	1	none		0.00	0.00
2			amo500t	Amoxicillin 500mg tab	200	1	none		0.00	0.00
3			ibu200t	Ibuprofen 200mg tab	400	1	none		0.00	0.00

Other charges: Item: Amount: 0.00  
 Customer outstanding balance: 84,850.00  
 Summary: 0.00  
 8% tax: 0.00  
 Total: 0.00

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

18. You are dispensing a prescription for ibuprofen. What can you infer from the following screen?
- mSupply has blocked you from dispensing the ibuprofen
  - There is a drug reaction with another medicine the patient takes
  - The patient has an allergy to ibuprofen
  - There is no stock of ibuprofen to dispense

Add item...

Item   ibu200t  New item

Line  Prescribed Quantity

Quan  of 515

Pack  Bulk/Outer pack size

**Continue**

Drug Interactions

Items	Affect type	Type	Groups	Significance
Warfarin 1mg tab (Marevan)	affects	augments	Anticoagulants	major

Directions

Abbreviation

Expanded directions

**Cancel** **OK** **OK & Next**

19. The Outreach Service is settling their account and paying off the full amount of \$1,158.40. You have entered the amount received. What is the next step?
- Click OK to save the payment
  - Check the Print box to print a receipt
  - Click Cancel, as the customer does not owe you anything
  - Click Distribute to allocate the payment to the outstanding invoice

Cash receipts

Name  OR  Invoice No.:

Cheque #  Entered date:  Status:

Note  Confirm date:  Store:

Receipt currency:  Currency rate:

Receipt


**Distribute** Disabled lines below are in a different currency

Entry date	Confirm d...	Invoice	Their ref	Comment	Total	Curre...	Outstandl...	Payment
15/02/2021	15/02/2021	6			1158.4	USD	1158.4	0

Double-click lines to enter payment amount  
Hold down shift to allocate whole invoice amount

Total outstanding 1,158.40  
To allocate 1,158.40  
Allocated 0.00  
Allocated in local currency 0.00

Total payment in local currency

**OK & Next** **Cancel** **OK** ☐ 

20. You are adding metformin to a prescription. Which of the following are TRUE? You may select more than one response.
- a) 30 tablets are being dispensed
  - b) Stock will be picked from the BLUE location
  - c) There is 1 repeat entered
  - d) The instructions have been entered using abbreviations

The screenshot shows a 'Prescription Entry' window with an 'Add item...' dialog box open. The dialog box contains the following information:

- Item: Metformin 500mg tab
- Line: 1
- Prescribed Quantity: 30
- Quan: 30 of 1970
- Pack: 1
- Bulk/Outer pack size: 0
- Repeats: Total 3, Repeat left 3, Expiry date 15/04/2021
- Directions: Take 11 TDS with food (Abbreviation), Take ONE tablet THREE times a day with food (Expanded directions)

The background window shows a table with the following data:

Line	Issue	Availa...	Tot in st...	Pack	Hold	Batch	Expiry date	Supplier	Donor	Location	Cost Price	Sell price	S
1	30	1970	1970	1		WES890	31/07/2028	CPP		BLUE	0.80	0.80	

At the bottom of the dialog box, there are buttons for 'Cancel', 'OK', and 'OK & Next'. The 'OK & Next' button is highlighted.

21. You are adding metformin to a customer invoice. Which of the following is TRUE?
- a) The batch selection will be random after you click OK
  - b) The batch expiring on 30/11/2022 is being issued
  - c) The batch expiring on 31/12/2028 is being issued
  - d) It's impossible to tell which batch is being issued



Customer invoice

Name: Medical Ward Confirm date: 00/00/00 Colour: Black

Their ref: Add item...

Comment:

New line

Item: Metformin 500mg tab met500 New item

Line: 1 Prescribed Quantity: 500

Quan: 500 of 2500

Pack: 1 Bulk/Outer pack size: 0

Add Place holder

Line	Issue	Availa...	Tot in st...	Pack	Hold	Batch	Expdate	Supplier	Donor	Location	Cost Price	Sell
1	500	2500	2500	1		MRT672	30/11/2022			PINK	0.20	
2	0	8000	8000	1		TSY992	31/12/2028			BLUE	0.20	

Total quantity issued: 500  
Total quantity available: 10500

Cancel OK OK & Next

Other charges Item: Amount: 0.00

Customer outstanding balance: 0.00

Subtotal: 0.00  
0% tax: 0.00  
Total: 0.00

Hold  
Finalise Export batch: 0 OK & Next Delete OK

22. After entering a payment for a prescription and clicking OK, the entire prescription is automatically finalised and it can no longer be edited.

- a) True
- b) False

Prescription Entry

Patient details

Name: Johnson, Laura Date of birth: 1/05/2000 Female

New Patient Code: LJ Address: 2 Pacific Road

Store: Kerang Hospital

Entered: 18/02/2021

Prescriber: Jones, Tom Confirm date: 00/00/00 Invoice: 16

Code: TJ Prescription date: 18/02/2021 Entered by: Helen

Items Payment Log

Other details

This invoice will be automatically finalised if a payment is entered.

Cheque #: Note

To Pay

Invoice total: 80.00

Total to pay: 80

Payment details

Total payment: 80

Amount given: 100

Change to give back: 20

Finalise Export batch: 0 Status: nw Print receipt OK & Next Delete OK

23. You open your list of Requisitions. Which of the following is TRUE?
- You have placed 4 orders to your supplier
  - There are 4 new requests for stock
  - There is 1 request for stock which has not been processed
  - There is 1 new delivery expected, which you should prepare to receive

The 'Requisition list' window displays a table with the following data:

ID	Name	Program	Date entered	Requisition d...	Status	Type	Comment
6	Kerang Hospital		10/02/2021	10/02/2021	sg	response	From request requisition 7
7	Kerang Hospital		15/02/2021	15/02/2021	fn	response	From request requisition 16
4	Kerang Hospital		10/02/2021	10/02/2021	fn	response	From request requisition 6
2	Kerang Hospital	Tuberculosis (TB) Program	4/02/2021	4/02/2021	fn	response	From request requisition 3

Buttons at the top: New customer requisition, New customer imprest, New customer stock history, Delete. A 'Show:' dropdown is set to 'All'. At the bottom, it says 'Double click on row to edit details' and has an 'OK' button.

24. You have received the following Requisition and reviewed it. You have decided to supply all items to the quantities requested. What is the next step?
- Check the Finalise box and click OK
  - Click the Supply quantity button
  - Click the Print button
  - Click the Create customer invoice button

The 'Edit requisition...' window shows details for a requisition from 'Kerang Hospital' (ID: 6). The 'Requisition date' is 10/02/21 and 'Order Received' is 10/02/21. The 'Comment' is 'From request requisition 7'. The 'Status' is 'sg' and 'Type' is 'response'. The 'Entry date' is 10/02/21 and 'Entered by' is 'Mei'. The 'Store' is 'National Medical'.

Buttons at the top: New line, Add from master list, Delete line(s), Filter items (Filter by item name or code), Supply quantity, Create customer invoice, Print. There are also fields for 'Max MOS' (0.0) and 'Threshold MOS' (0.0).

The table below shows the items to be supplied:

LI...	Item code	Item name	Unit	Our stock on hand	Customer current stock on hand	Customer monthly usage	Customer requested	Already issued	Remaining to supply	Supply this invoice	Comment
1	cebx250i	Ceftriaxone 250mg inj		7200	97430	0	300	0	300	300	
2	amo500t	Amoxicillin 500mg tab		523240	538	3.33333...	200	0	200	200	
3	ibu200t	Ibuprofen 200mg tab		34400	3865	0.41666...	400	0	400	400	

At the bottom, there is a 'Save Sort order' button and a 'Finalise' checkbox. The 'Finalise' checkbox is checked. Other buttons at the bottom are 'Cancel', 'OK & Next', and 'OK'.

### **Legacy 3 Knowledge Check**

25. When would you split stock?
- a) When you want to create a new location
  - b) When you want to move stock of the same batch to the same location
  - c) When you want to repack stock
  - d) When you want to move some stock of the same batch to a different location
26. Medicines availability is defined as the % availability of items across different levels of the health system. Why is it recommended to use a Basket of Goods as a measure of this instead of every item?
- a) It is better to measure every item, using a basket of goods is lazy
  - b) It is slower to measure medicines availability using a basket of goods but it is more accurate
  - c) Measuring availability of all items may give a misleading picture of the true situation – not all items are meant to be available always e.g. seasonal differences of certain conditions or specialist items
  - d) It is quicker to measure medicines availability using a basket of goods and it is more accurate
27. Inventory adjustments allow you to increase or decrease the quantity of stock that is recorded in mSupply. When will you need to do this?
- a) Distributing stock to customers or patients
  - b) Receiving stock from suppliers
  - c) Stock needs to be destroyed due to damage or expiry
  - d) Stock has been stolen
  - e) You find some stock on the shelf that is not in mSupply and you don't know where it came from
28. Setting up locations will help track stock as it gets moved around, which will save time when picking stock or doing stocktakes. Using locations is compulsory.
- a) True
  - b) False
29. Miscellaneous labels allow you to create and save labels to print at any time from a label printer. This is particularly helpful for labels you print regularly, such as labels for Repacks. Which part of this Label window will Not print on the label?
- a) Centred footer
  - b) Label name
  - c) Heading
  - d) Left and right footers
  - e) Body
30. A build is a way of recording items you have manufactured. It will adjust your stock levels such that the quantities of raw materials are used and a new stock is created. What is a bill of materials?
- a) The cost of the raw items needed to make the final product
  - b) Only the manufacturing method
  - c) The bill you receive after building a house
  - d) A recipe or formula for building an item. It records the ingredients and the quantity of each required to make the finished product.
31. Which of the following is true about Stocktakes and Inventory Adjustments?
- a) You need to do a full count of your physical stock in order to make an Inventory Adjustment

- b) Stocktakes and Inventory Adjustments result in the same outcome: a change to the available quantity of an item in mSupply
- c) You can only adjust batch and expiry date information in Stocktakes, not in Inventory Adjustments
- d) You can adjust batch and expiry date information in both

32. What is the best way to create a basket of goods?

- a) Choose an even spread of critical items from your store
- b) Choose items which are slow movers to make it look like you are always well stocked
- c) Choose a random list of items from your store
- d) Choose every item in your store

### **Legacy 4 Knowledge Check**

33. When do you finalise a purchase order?

- a) After you have received all the goods on the purchase order (or after you have been told you will not receive any more from the supplier)
- b) After you have sent it to the supplier, before receiving any goods
- c) Anytime after you have received at least one set of goods, from the purchase order, but not the items
- d) After each draft of a purchase order

34. Before you run a Suggested Order Quantity Report, what should you do?

- a) Do a manual quantification of all items first
- b) Ensure all true customer and supplier invoices have been confirmed
- c) Finalise or delete “ghost” purchase orders which are still in the system but which will never arrive

35. Review the tender window. Which of the following is true? Select the answer(s)

- a) Monty Meds has offered the lowest price
- b) The item being reviewed is Amoxicillin 500mg tablet
- c) Monty Meds has been selected as the preferred supplier
- d) The total quantity being tendered for is 10000

**Edit Tender Item**

Item Name: Amoxicillin 500mg tablet      amo500t      Black

Description

Set tender item criteria    Compare supplier responses    Purchase orders

Specifications sent out: 500 packs of 20 = a total quantity of 10000

Supplier	Manufacturer	Price	Currency	Pack Size	Volume	Tot...	Price with...	Cost Local...	Adj Cost	+/- %	Pref	Disq	Comment
Monty Meds		1.50	AUD	20	0	0.00	1.50	1.09	0.0546	0	<input type="checkbox"/>	<input type="checkbox"/>	
Azul Medica		10.00	AUD	100	0	0.00	10.00	7.28	0.0728	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	tablets in blister packs
Montana Supplies		15.00	AUD	100	0	0.00	15.00	10.92	0.1092	0	<input type="checkbox"/>	<input type="checkbox"/>	

Note

Bench mark

Bench mark supplier    Not chosen

Adjusted cost    0.0000

Min price    0.0000      Max price    0.0000

OK & Next    Cancel    OK

36. Which of the following is true about this tender? Select the answer(s)
- a) Metronidazole has not yet been awarded to a supplier
  - b) The total quantity of ceftriaxone advertised on the tender is 400 units
  - c) All three items have been awarded to different suppliers
  - d) Amoxicillin has been awarded to Azul Medica

**Edit Tender**

Description: Annual Medicines and Consumables Tender 2022

Creation date: 27/09/2021 Issue date: 27/10/2021 Response by Date/Time: 27/11/2021 00:00 GMT Status: SG Locked

Serial Number: 18 Our reference:

Comment:

Items and Compare Prices | Notes | Choose Suppliers and Enter responses | Standard conditions | Purchase orders | Reference documents | Tender preferences | Synchronise | Log

New line | Delete line | Print Reports

Incoterm: None

Search items: Show: All

Lin...	Code	Item name	# of Packs	Pack Size	Total...	Currency	Original	Original...	PO local	Unit	Preferred Supplier	Item...	Commer
1	amo500t	Amoxicillin 500mg tablet	500	20	10000	AUD	1,000.00	728.01	0.00		Azul Medica	preferenc...	
2	cef250i	Ceftriaxone 250mg injection	40	10	400	AUD	184.00	133.95	0.00		Montana Supplies		
3	met500i	Metronidazole 500mg/100m...	500	1	500		0.00	0.00	0.00		No bids		

Total for Tender quantities 1,184.00  
Total for Purchase Order 980.00

Save Sort order | Cancel | OK

37. After you have awarded your tender items to suppliers, you are going to create some split purchase orders. What is the correct process? Arrange the following items in the correct order:
- a) Under the Purchase orders tab, click on the **Create Blank POs** button. Create the same number of blank POs per supplier as you would like the number of deliveries. Enter the appropriate EDD for each one
  - b) Under the Tender preferences, ensure the **Create Split Deliveries** checkbox is ticked. Click OK
  - c) Select the newly created blank purchase orders and click the **Fill quantities** button
  - d) When you are happy with the number of purchase orders and quantities entered, select each purchase order and click the **Convert to SG** button



- b) All items on the Outstanding purchase order lines are overdue from their estimated date of delivery, otherwise they would not be on the list
- c) The expected date of arrival for the Specialist laboratory equipment is 10/04/22. If you haven't received anything or heard from Azul Medica by then, you should contact them to follow up
- d) You have not received any metformin 500mg tablets from PO #5 yet.

Outstanding purchase order lines

Search by supplier or code

Find Print Update EDD

PO #	Supplier's...	Supplier Name	Item name	Order Confirm Date	Requested	Expected date	Days to EDD	Adjusted	Qty Received	Qty Outstanding
5	ARC	Archie Distribution	Metformin 500mg tab	26/07/2021		6/02/2022	0	500	200	300
5	ARC	Archie Distribution	Ibuprofen 200mg tab	26/07/2021		6/02/2022	0	5000	0	5000
61	AZU	Azul Medica	Specialist laboratory equipment	11/01/2022		10/04/2022	58	1	0	1
60	AZU	Azul Medica	Ibuprofen 200mg tab	6/01/2022	10/03/2022	10/03/2022	27	2000	0	2000

40. You are entering a new Goods Receipt for 300 metformin tablets. The supplier has sent you 2 different batches. You've entered the first line already. What are your next steps? Select one or more correct answers.
- a) Click the **Add line** button, then enter the relevant details of the second batch. You must enter the location now, there will be no chance for editing later
  - b) Click the **Add line** button, then enter the relevant details of the second batch. You must enter the same location as the first line.
  - c) You can only add one batch per goods receipt so you will just need to remember to manually add the second batch later via an Inventory adjustment
  - d) Click the **Add line** button, then enter the relevant details of the second batch. You can choose a different location if you wish.

Edit item...

Item: Metformin 500mg tab met500t

Add line Delete line Duplicate line

Remaining quantity to receive: 200 Packs of: 1

Quantity	Pack Size	Total quan	Batch	Expiry	Location	Comment
100	1	100	FF801	28/02/2023	SHELF	
100	Total received	100				

Location Details

Total capacity 0 m3 Volume per pack m3

Available space 0 m3 Space required 0 m3

Weight Per Pack kg

Total Line Weight N/A kg

Comment

Cancel OK OK & Next



41. You are editing an item in a Supplier invoice and have finished adding additional details. Which of the following is true? Select the correct answer(s):
- The cost of one tablet is 0.05 USD
  - The received stock is in packs of 100, but you are entering them as packs of 1 so that you can dispense/distribute individual tablets
  - You cannot edit Location details from this window
  - You cannot edit Batch or Expiry details from this window

**Add/edit supplier invoice line**

Item:  met500t

Received quantity:  Invoice quantity:

Pack size:  Tab Invoice pack size:

Total quantity: 300.00 Invoice total quantity: 300.00

Batch:  Location:

Expiry:  Volume per pack:  m3

Weight per pack:  kg

Invoice line unit cost (USD):  Adjusted local cost: 0.05 % Margin:  Sell price:

Price extension (USD): 15.00 Donor:

Comment:

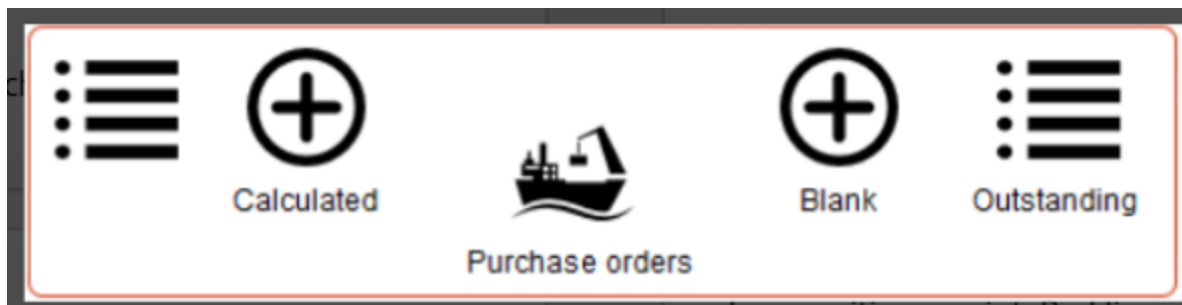
42. Based on this Goods Received date vs Order date- Show Delivery Days Report, arrange the following suppliers in order of the shortest lead time to the longest:
- Monty Meds
  - Azul Medica
  - Archie Distribution
  - Montana Supplies

Goods Received date vs Order date--Show Delivery Days Creation date : 11/02/2021 to 11/02/2022 Store : National Medical Warehouse									
Name	Order no.	Stat	Date Confirmed	Lines in PO	Date goods rec'd	Item Name	Quantity	Delivery Method	Lead Time (Days)
Azul Medica	4	fn	20/05/2021	3	20/05/2021	Amoxicillin 500mg tab	5		42
Azul Medica	4	fn	20/05/2021	3	20/05/2021	Metformin 500mg tab	50		42
Azul Medica	4	fn	20/05/2021	3	20/05/2021	Metformin 500mg tab	50		42
Archie Distribution	5	cn	26/07/2021	2	28/01/2022	Metformin 500mg tab	200		186
Monty Meds	29	cn	19/10/2021	2	19/10/2021	amoxicillin 250mg/5mL suspension	10		1
Monty Meds	29	cn	19/10/2021	2	19/10/2021	paracetamol 250mg/5mL suspension	92		1
Monty Meds	29	cn	19/10/2021	2	19/10/2021	paracetamol 250mg/5mL suspension	8		1
Montana Supplies	59	fn	5/01/2022	2	5/01/2022	Amoxicillin 500mg tablet	30		5
Montana Supplies	59	fn	5/01/2022	2	5/01/2022	Amoxicillin 500mg tablet	20		5
Montana Supplies	59	fn	5/01/2022	2	5/01/2022	Metformin 500mg tab	10		5

43. Look at the following Suggested Order Quantity Report. Which of the following is true? Select the correct option:
- This report is suggesting a quantity to order based on a need for 12 months of stock. You can adjust how many months of stock you wish to have on hand when running the report.
  - The suggested order quantity of Isoniazid 100mg tab is 500
  - Isoniazid and Ethambutol both only have 6 months of stock cover remaining
  - The monthly usage for the last 12 months of Ethambutol 400mg tab is 63

Suggested Ordering Report: Months cover : 12 months. Based on last 12 months usage data.												
Page 1 of 1												
Item Code	Item Name	VEN	Item category	Stock on hand	Back order	12 months average	24 months average	Monthly usage for the last 12 months	Months Cover	Quantity on Order	Ordered quantity in use	Suggested Forecast order used
Iso100	Isoniazid 100mg tab			2000	0	250	125	250	8	0	0	1000 N
Eth400	Ethambutol 400mg tab			1000	0	125	63	125	8	0	0	500 N

44. Match the descriptions/answers with the buttons below:



- New calculated purchase orders
  - Outstanding purchase orders
  - Purchase orders list
  - New blank purchase orders
    - Click to create a new purchase order from scratch. Individual items are added one at a time
    - Click to create a new purchase order based on current stock on hand, historical usage and delivery times
    - Click to see a list of items on purchase orders awaiting receipt. Red lines indicate an item that is overdue from its expected delivery date (or where an EDD has not been entered)
    - Click to renew purchase current and past purchase orders
45. Match the definitions/answers with the terms below:
- Buffer stock
  - Ordering cycle
  - Lead time
    - The time delay between carrying out the quantification analysis and when the stock is delivered to the store
    - How much of this item you plan to have on hand just before your next order arrives
    - How often you plan to order this item