



Open mSupply

Participants Guide

MEBS Global Reach

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Open mSupply

Introduction to Open mSupply

This foundational course introduces participants to Open mSupply, an open-source electronic Logistics Management Information System (eLMIS) designed for healthcare supply chains in low-resource settings. The course provides an overview of core concepts, including inventory control, ordering workflows, syncing and offline usage, batch and expiry tracking, and handling returns. Participants will explore practical scenarios, workflows, and exercises to build confidence in using Open mSupply at the facility or district level.

Learning Objectives

By the end of this course, participants will:

- Understand the role and functionality of Open mSupply in a health supply chain.
- Navigate the system interface and manage items and locations.
- Perform accurate inventory transactions including stocktakes, adjustments, and repacking.
- Create and manage internal orders and requisitions between facilities.
- Process outbound and inbound shipments, including allocation and verification.
- Handle customer and supplier returns appropriately.
- Explain the role of syncing and central servers in data flow and visibility.
- Apply good practices in data entry to improve supply chain efficiency and accountability.

Target Audience

Storekeepers, pharmacists, and inventory managers using Open mSupply at facility or district level

Supervisors and logistics coordinators responsible for order approvals and shipment handling

Staff transitioning from manual systems to digital LMIS platforms

Anyone seeking foundational understanding before undertaking advanced Open mSupply modules

Course Structure

The course is organized into the following modules:

Getting Started

What is Open mSupply?

Open mSupply Documentation

Introduction to eLMIS, syncing, and central servers

Navigation and help resources

Core Inventory Concepts

Items, stores, batches, expiry dates, and storage locations

Understanding stock on hand

Understanding pack sizes and units

Stock Management Activities

Performing full and partial stocktakes

Stock adjustments and repacks

Ordering and Supply Workflow

Internal orders and requisitions

Suggested quantity and consumption graphs

Outbound shipment: allocation to delivery

Inbound shipment: delivery and verification process

Returns and Corrections

Customer and supplier returns

Performing returns directly from outbound and inbound shipments

Practical Scenario and Decision-Making

A practical scenario on Open mSupply

Conclusion and Next Steps

Summary of key skills learned

Session 1: What is Open 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 Open mSupply?

Open mSupply is an **open-source** eLMIS designed to support healthcare supply chains in low-resource settings.

Its key purpose is to ensure:

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

Key Features

Open 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 Open mSupply.

Why should data be recorded on Open mSupply?

- Accurate and timely data entry into Open 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 Open 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 Open 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 Open mSupply.

As a result, the following issues arise:

- **Stock Imbalance**

Since the shipment wasn't recorded, Open 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, Open 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 Open 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 Open 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.

Session 2: Documentation and Release History

Before we continue further into the course, let's take a moment to familiarize ourselves with some important resources that will help guide you throughout your learning experience.

1. Open mSupply Documentation Website

<https://docs.msupply.foundation/>

The Open mSupply Documentation website is your go-to guide for learning how to use Open mSupply and other mSupply products. It includes detailed instructions, tutorials, and technical documentation that will help you understand how to operate the system and make the most out of its features. You'll find step-by-step guides and troubleshooting tips to assist you as you navigate through Open mSupply.

2. Open mSupply Release Version History

<https://msupply.foundation/open-msupply/releases>

<https://github.com/msupply-foundation/open-msupply/releases>

It's also important to stay up to date with the latest changes in Open mSupply. The Open mSupply Release History website tracks updates, bug fixes, and new feature releases for the system. Use this link to see version details and updates that show what's changed in each release.

Why This is Important for You

Throughout this course, you might notice that some of the content, like screenshots, clickthroughs, or videos, doesn't exactly match what you see in the software when using it live. This is because the course materials may reference different versions of Open mSupply than the one you're using.

If something doesn't look quite right or if you encounter discrepancies, refer to the **Open mSupply Documentation** website for the most up-to-date information. The documentation will always reflect the latest version of the software, ensuring you're using the most current features and best practices.

If you're still unsure or need further clarification, feel free to contact the support team for assistance at support@msupply.foundation.

Session 3: Offline and Sync

Open mSupply is a powerful tool designed to support healthcare operations at all levels, from local clinics to larger hospitals, ensuring the right products are available in the right quantities at the right time.

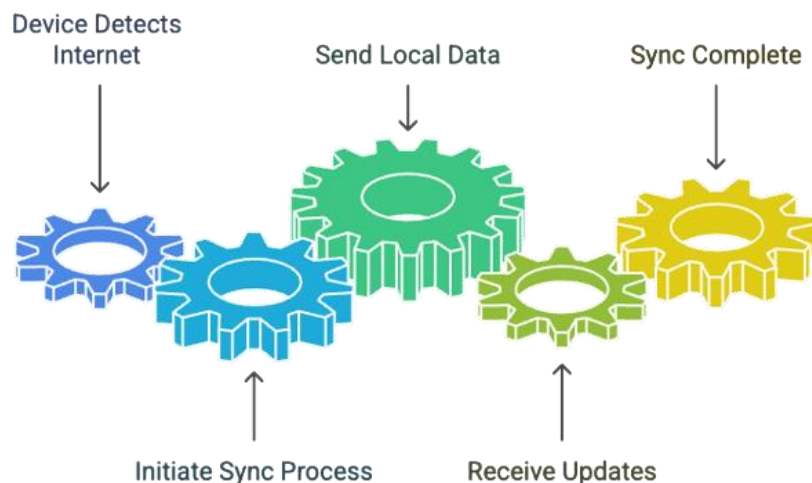
The system works by streamlining the processes of inventory management, procurement, and order fulfillment, providing real-time visibility into stock levels, order status, and distribution.

What Is Sync?

Sync (short for *synchronisation*) is the process that keeps your local device and the central system up to date with each other.

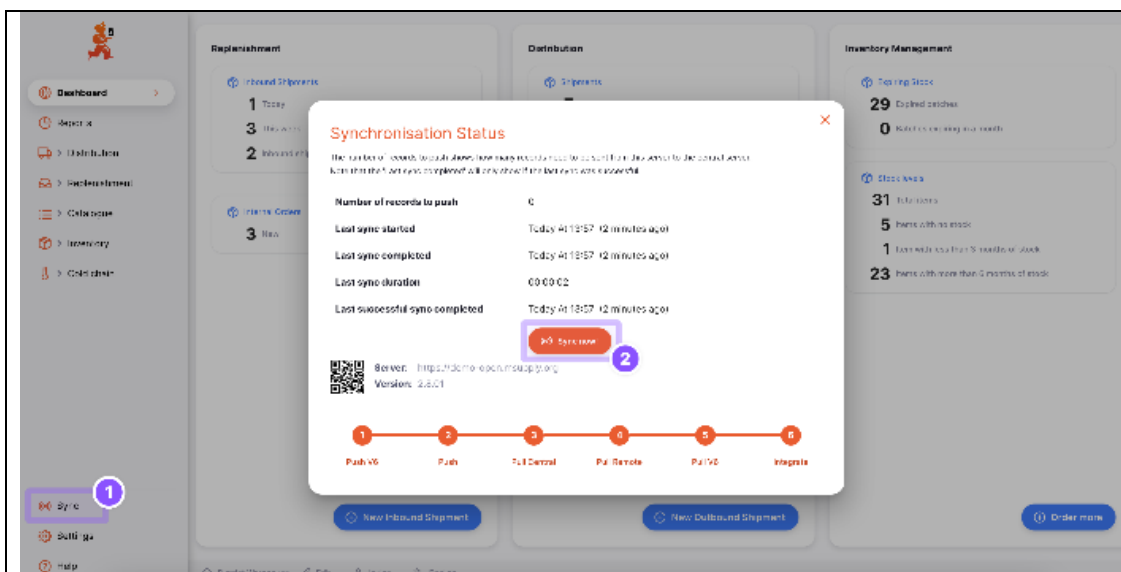
It involves two key actions:

1. Sending the data you've entered on your device to the central server (like transactions or stocktakes).
2. Receiving updates from the central system back onto your device (such as new shipments or changes from other sites).



Open mSupply also gives you control over sync:

Open mSupply automatically tries to sync at regular times (e.g., every 5 minutes), as long as the device has internet. You can also press the “**Sync now!**” button to manually trigger a sync when needed (for example, you want to make sure your order is sent immediately).



Syncing ensures that the latest information is available across your store, central teams, and other connected facilities, supporting accurate, real-time decisions across the supply chain.

What Happens When You Are Offline?

When you use the system on a tablet or computer at your facility, you might not always have internet. In some rural or remote areas, internet access may be limited or only available at certain times of day. That's okay, the system is built to continue working even when offline.

You can still:

- Record new stock received or transferred (manually)
- Dispense medicine to patients
- Add or update patient records
- Create or approve requisitions
- Perform stocktakes

Disadvantages of using the system offline:

- Limited real-time updates
- Potential data sync issues
- Dependency on local storage

All of this information is saved on your device. You won't lose your work just because the internet is unavailable.

Why Syncing Is Important

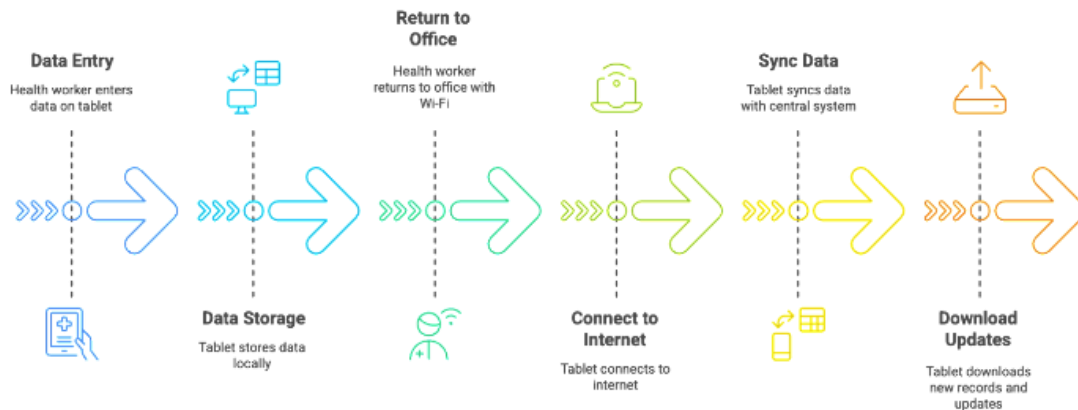
Syncing is important for several reasons:

- It allows your supervisors and central-level planners to see what's happening at your facility.
- It keeps your stock levels accurate across the system.
- It lets you receive updates that were entered at other locations.
- It ensures your data is safely backed up in case your device is lost or damaged.
- Even if you are offline for several days, your device will keep saving your work and then sync everything when it next connects.

Syncing in Action

Imagine this:

A health worker is using a tablet to enter dispensing data while working in a rural clinic with no internet. The tablet stores all this information in its local storage. Later in the day, the health worker returns to a central office with Wi-Fi. The tablet connects to the internet and syncs the saved data with the central system. At the same time, it downloads any new updates or records created elsewhere.



Knowledge Check

Question 1

Which of the following best describes what happens when your device syncs in Open mSupply?

- a) It clears old transactions from your device
- b) It sends your local data to the central server and receives updates from it
- c) It backs up your data to a USB drive
- d) It restarts the Open mSupply app

Question 2

You're working in a rural clinic using Open mSupply on a tablet. After 2 days offline, you reconnect to the internet.

You've recorded several transactions during that time. **What should you do next?**

- a) Restart the app to send the data
- b) Wait for the automatic sync to run or press "Sync now"
- c) Re-enter the transactions again
- d) Log in to the central server

Session 4: Understanding the Central Server

What is a Database?

A Database is a digital structure that stores all your data. This can include things such as:

- Stock levels
- Transaction history (received, issued, transferred, or dispensed)
- Orders and requisitions
- Patient records
- Stocktakes and adjustments

Each device, like your tablet or facility computer, has its own local database. When you use the system offline, you're adding or editing data in this local database.

What is a Central Server?

A Central Server is a powerful computer that stores the main copy of the data from all devices across the system. This is where data from multiple facilities are brought together. Syncing ensures the data from each local database is sent to the central server. Depending on how your country or organisation has set up its system, the central server could be located at:

- The Ministry of Health data centre
- The national drug warehouse or central medical stores
- The provincial or regional health office
- Hosted in the cloud (on the internet), managed by an external IT provider

The Central Server collects data from all facilities using the system. It allows central-level users to:

- Generate accurate reports on medicine usage and stock availability
- Track performance across regions or facilities
- Plan procurement and deliveries more effectively
- Monitor programme coverage, especially for things like HIV, immunisation, or tuberculosis

Why Centralised Data Matters

By syncing data from all facilities into one place, the system gives decision-makers a full picture of what is happening on the ground.

For example:

- If five clinics in one region are all running low on a certain medicine, the Central Server will show this pattern so action can be taken.
- If one clinic is overstocked, redistribution can be planned.
- During emergencies (such as disease outbreaks), national-level stock levels and supply gaps can be viewed in real time.

Without a Central Server, data would stay scattered across many different devices, making it difficult to coordinate or make good decisions.

Knowledge Check

Question 1

Why is syncing to the central server important?

- a) It makes your device run faster
- b) It shares your data with other apps
- c) It allows your local data to be backed up and shared with the national system
- d) It disconnects your store from other facilities

Question 2

Imagine in your country, the central server is hosted at the national medical warehouse. What does this mean?

- a) Your store cannot sync unless you visit the warehouse
- b) All facility data is collected and stored centrally for planning and reporting
- c) You can only access the system if you're near the warehouse
- d) Only procurement officers can see the data

Session 5: Open mSupply Terminology

It is important to familiarize yourself with some key components and terminology that are essential for understanding how Open mSupply functions. These terms are foundational to managing the supply chain system, and getting to know them will make it easier to navigate and use the system effectively.

Key Concepts

- **Items**

Products managed in mSupply (includes medicines, consumables, equipment, laboratory/radiology items).

- **Stores**

Departments within a facility who may or may not manage inventory independently from a larger entity. For example, there may be two stores in a hospital - one inpatient pharmacy store and one outpatient pharmacy store.

- **Locations**

Specific place inside a store where items are kept. For example, a large central warehouse may have many locations (e.g., A.02.04, B.01.03), while small stores may have less (e.g., Room 1, Room 2). Items may also be stored without assigning a location (i.e., just stored alphabetically).

- **Suppliers**

Suppliers are facilities that a store orders or receives stock from. Suppliers may be external (e.g., private drug companies or wholesalers) or internal (e.g., central medical store, provincial warehouses).

- **Donors**

External entities who pay for donated stock (e.g., UNICEF, USAID). No donor is entered when the government or medical store is paying in a normal financial transaction. When the donor is recorded, you can track donated items through the supply chain and run donor transaction reports and stocktakes.

- **Customers**

Recipients of items, excluding patients. This includes health centres, hospitals, wards, private clinics and pharmacies, outreach services and any other entity that an mSupply store issues stock to.

- **Patients**

Individuals who receive items from a prescription. When a store uses mSupply in dispensary mode, patients receive unique ID numbers and we can track their prescription history, allergies, payment history, insurers, and notes.

- **Prescribers**

Prescribers are authorised medical professionals who provide prescriptions to patients, which we can dispense in mSupply. Prescribers may include doctors, nurses and other authorised individuals.

- **Users**

Users are the people using mSupply (you!). Each user has their own password and set of permissions (which can vary from store to store). System logs track everything that users do in mSupply.

Open mSupply Terminology

The following table shows the changes in naming conventions between Open mSupply and Legacy mSupply. This is just a brief overview, and we will go into more detail later in the course, especially if any of these are unfamiliar to you.

<i>Open mSupply Term</i>	<i>Legacy mSupply Term</i>	<i>Definition</i>
Outbound Shipment	Customer Invoice	Refers to the creation of a supply of goods sent to a particular customer (e.g., a healthcare facility).
Inbound Shipment	Supplier Invoice	Refers to the receipt of goods supplied by a particular supplier.
Requisition	Customer Requisitions	An order placed by a customer (e.g., a healthcare facility) requesting the supply of goods.
Internal Order	Internal Order	A request made to a supplier for stock needed by a facility or organization.
Supplier Return	Supplier Credit	Refers to returning goods to a supplier, typically due to damage, expiry, or incorrect delivery.
Customer Return	Customer Credit	The process of receiving returned goods from a customer (facility), often due to issues like overstock or expiry.

Session 6: Packs, Pack sizes and Units

In Open mSupply, a **pack** refers to how an item is grouped, stored, and tracked in the system. It reflects the **physical unit** in which the item is received, counted, and issued. Getting this right is critical for accurate stock management and reporting.

Incorrect entry of packs and pack sizes is the most common area where mistakes happen in digital stock systems. This can affect how much stock is shown, how much gets ordered, and even how stock is dispensed to patients.

What is a Pack?

A *pack* is the standard container or format in which the item arrives or is handled. It's how the system counts and manages inventory. These include:

A **bottle** of tablets

A **box** of syringes

A **blister strip** of capsules

A **vial** or **ampoule**

A **carton** with multiple smaller containers

Example: You receive a box containing 100 gloves. That box is considered 1 pack in the system. If each glove is an individual unit, then the pack contains 100 units.

What is Pack Size?

The pack size is the number of individual units inside one pack. It answers: *"If I open this pack, how many tablets/syringes/strips are inside?"*

This detail is essential when converting between stock levels, order quantities, and patient dispensing.

If a bottle has 100 tablets, the **pack size** is 100.

If a carton contains 10 vials, the **pack size** is 10.

If you have 1 bottle of paracetamol with 100 tablets inside: • **Pack** = 1 bottle • **Pack Size** = 100 tablets • **Total tablets in stock** = 1 bottle × 100 tablets = **100 tablets**

Term	Example	What it means	Why it matters
Pack	1 bottle of iron tablets	The physical container you receive, store, or dispatch	This is what you handle, count, and store in your warehouse
Pack size	100 tablets inside the bottle	The quantity of units inside one pack	Helps calculate total stock levels, conversions, and ensures correct data entry
Unit	1 tablet	The smallest measurable item (e.g., per tablet, dose)	Used for dispensing to patients and tracking consumption or usage

Activity

What is the correct pack quantity and pack size for the following?

- 1) 1 box of gloves (contains 200 gloves)
- 2) 5 boxes of amoxicillin (10 tablets per box)
- 3) 20 boxes of male condoms (each box has 144)
- 4) 8 tubes of cream (30g per tube)
- 5) 6 bottles of paracetamol suspension (each 60mL)

Special Case: Dispensaries Sending Individual Units

In a **warehouse**, stock is managed in bulk — physical containers like boxes, cartons, or bottles. These are referred to as packs, and the system tracks how many packs you have, each containing a fixed number of units (known as the pack size).

Examples: • 1 bottle of 1000 tablets → Pack Size = 1,000 • 1 box of 100 gloves → Pack Size = 100 • 1 carton of 20 vials → Pack Size = 20

But in a **dispensary**, you may not be handing patients full bottles or cartons. Instead, you will be giving them exactly what they need for treatment:

20 **tablets** for a 5-day course

3 **syringes** for injections

15 **mL** of oral suspension

So instead of tracking packs, you need the system to track **individual units** — so the system matches exactly how you work.

Note: Some dispensaries may give out only full packs, like whole bottles or boxes, so they track stock in packs instead of single units. Always check how your dispensary handles stock before entering it into the system.

Entering Stock for Unit-Based Dispensing

<i>Real Item Received</i>	<i>How You Enter It in Dispensary</i>	<i>What the System Understands</i>
1 bottle of 1,000 tablets	Pack Size = 1, Pack Quantity = 1,000	You have 1,000 tablets to give out
1 box of 10 vials	Pack Size = 1, Pack Quantity = 10	You can give out 10 separate vials
5 strips of 10 tablets each	Pack Size = 1, Pack Quantity = 50	You have 50 tablets to give out.

Comparing Warehouse vs. Dispensary

<i>Detail</i>	<i>Warehouse Entry</i>	<i>Dispensary Entry</i>
What You Received	1 bottle of 1,000 tablets	1 bottle of 1,000 tablets
How You Use It	Store and move it as a full bottle	Dispense tablets one-by-one to patients
Pack Quantity (number of packs)	1	1,000
Pack Size (units per pack)	1,000	1
Total Stock in System	$1 \times 1,000 = 1,000$ tablets	$1,000 \times 1 = 1,000$ tablets
What the System Sees	"You have 1 bottle with 1,000 tablets"	"You have 1,000 individual tablets"
How You Dispense It	Must repack or convert to issue partial quantity	Can issue 1, 5, or 10 tablets directly

Why It Matters

This is one of the most common areas where users make mistakes — and those errors can have real consequences:

- **Over- or under-stocking:** If you mistakenly enter that one pack equals one unit, the system may show you have far less or far more stock than you actually do.
- **Incorrect orders:** If the pack size is wrong, the quantity ordered might not match what's actually needed or received.
- **Reporting errors:** If you want to generate reports on your stock, this will be inaccurate.

Key Takeaway

Always double-check the **pack size** and **unit of issue** when entering new items or stock.
If in doubt, ask your supervisor or refer to the product label or supplier invoice.

Getting this right ensures that your inventory reflects what you physically have — and what you safely give to patients.

Knowledge Check

Question 1

What is the significance of getting pack sizes right?

- a) It determines the price of products.
- b) It is not important for stock management.
- c) It only matters for labeling.
- d) It affects stock visibility and ordering.

Question 2

If you have 1 bottle containing 100 tablets, what is the total stock in the system?

- a) 1,000 tablets
- b) 100 bottles
- c) 100 tablets
- d) 10 vials

Question 3

What could happen if pack sizes are incorrectly entered in the system?

- a) Ordering errors can happen.
- b) Over- or under-stocking may occur.
- c) It will only affect pricing.
- d) It won't impact anything.

Question 4

Which of the following statements about pack size is true?

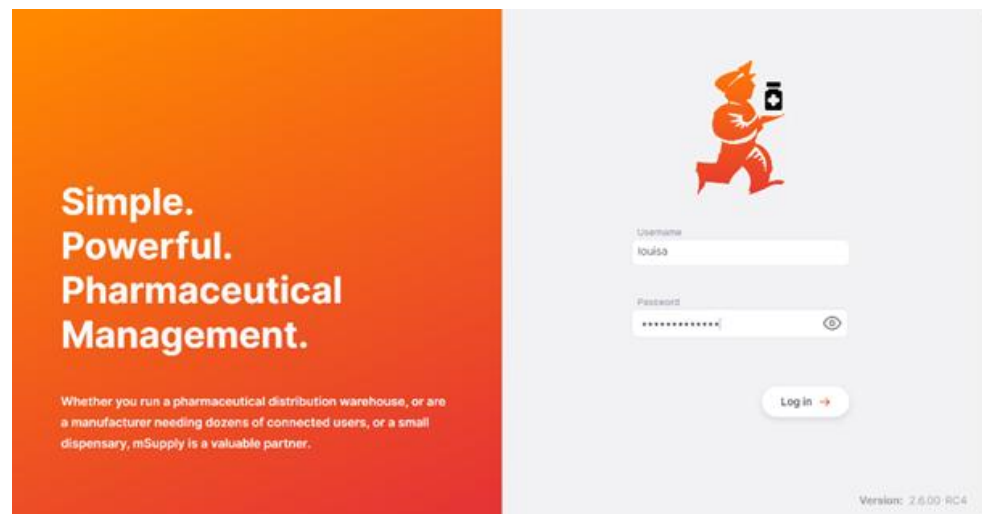
- Pack size indicates how many individual units are within one pack.
- Pack size refers to the total number of items in stock.

Question 5

How should stock be managed differently in a warehouse compared to a dispensary?

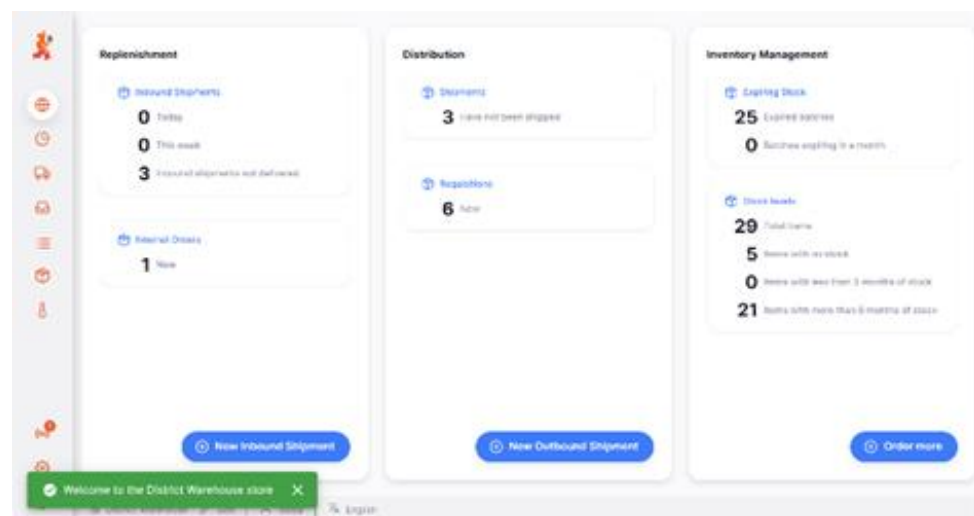
- a) Both manage stock only in packs.
- b) Warehouses do not track individual items, while dispensaries do.
- c) Dispensaries focus on bulk orders, warehouses on precise counts.
- d) Warehouses manage stock in bulk, dispensaries manage by individual units.

Session 7: Navigating Open mSupply

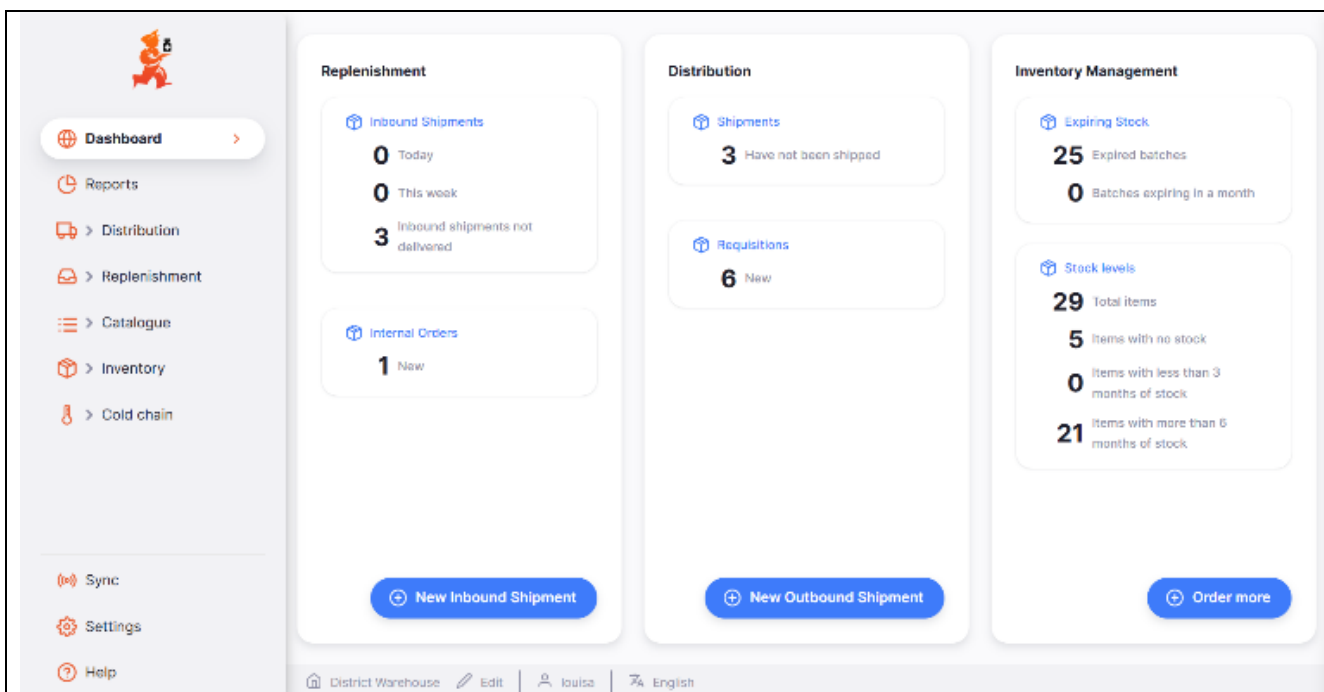


Login page

Once your credentials have been entered, select **Log in**.



Welcome to the **Home Page**. Here you will find your dashboard with key information about your store. Select the **x** to close any notifications.



Your dashboard is divided into sections to track **Replenishment**, **Distribution**, and **Inventory management**, giving you a clear overview of stock movements and status.

Quick buttons (bold blue) allow for faster actions like creating shipments or ordering stock.

Headings can be selected to see more details about that topic. For example, we know that 25 batches are expired here, but let's see which ones.

View Stock

Filters: Code or Name, From expiry, To expiry: 03/03/2025

Code	Name	Batch	Expiry	Location	Unit	Pack Size	Pack Qty	SOH
diphehhib	DTP-HEPB-HIB (Pentavalent) Vaccine, 1 dose	FGH1834	12/31/2018	FR	Vial	1	13	13
030062	Acetylsalicylic Acid 300mg tabs	dew124	12/31/2018		Tablet	1	3	3
030063	Acetylsalicylic Acid 100mg tabs	ser421	12/31/2018		Tablet	1	2	2
030063	Acetylsalicylic Acid 100mg tabs	arr214	12/31/2020	SA	Tablet	20	98	1,960
Para250	Paracetamol 250mg/5ml Suspension, 1000ml	235325	12/31/2020	FR	Bottle	1	20	20
030453	Amoxicillin 250mg tabs	rtt425	12/31/2020	SB	Tab	10	210	2,100
030453	Amoxicillin 250mg tabs	sfes142	12/31/2020		Tab	1	3	3
050457	Amoxicillin Dry Powder for Suspension 125mg...	gte432	12/31/2020	SB	Bottle	10	200	2,000
030062	Acetylsalicylic Acid 300mg tabs	oef142	12/31/2020	SA	Tablet	100	89	8,900

Showing 1-20 of 25. Rows per page: 20. < 1 2 >

You can see a full list of the 25 batches expired before today (03/03/2025)

You can also adjust **filters** such as changing the dates to fit your needs.

You can also filter items by searching with your **item filters**.

If there are any other filters you would like to use, you can search for them here.

This table gives you more details about the batches that are expired so that you can take further action if needed. You can also **export** this table into a spreadsheet file. Select the mSupply icon to expand your menu.

View Stock

Filters Code or Name From expiry To expiry 03/03/2025 New Stock Export

Code	Name	Batch	Expiry	Location	Unit	Pack Size
dtphbhib	DTP-HEPB-HIB (Penta) Vaccine, 1 dose	FOH834	12/31/2016	FR	Vial	1
030062	Acetylsalicylic Acid 300mg tabs	dew124	12/31/2016		Tablet	1
030063	Acetylsalicylic Acid 100mg tabs	ser421	12/31/2016		Tablet	1
030063	Acetylsalicylic Acid 100mg tabs	arr214	12/31/2020	SA	Tablet	20
Para250	Paracetamol 250mg/5ml Suspension, 1000mL	235325	12/31/2020	FR	Bottle	1
030453	Amoxicillin 250mg tabs	rtt425	12/31/2020	SB	Tab	10
030453	Amoxicillin 250mg tabs	stes142	12/31/2020		Tab	1
050457	Amoxicillin Dry Powder for Suspension 125mg...	gte432	12/31/2020	SB	Bottle	10
030062	Acetylsalicylic Acid 300mg tabs	def142	12/31/2020	SA	Tablet	100

Showing 1-20 of 25 Rows per page: 20 < 1 2 >

District Warehouse Edit | Louisa English

You can now see your menu in full detail. Here you can see that you are currently in your **View Stock** page. You can also see which page you are looking at here. The **View Stock** page provides you with information about the stock that is currently available in your store. You can also select different column headers to sort out the order of your list. Let's sort our item names alphabetically. Select the column header Name.

View Stock

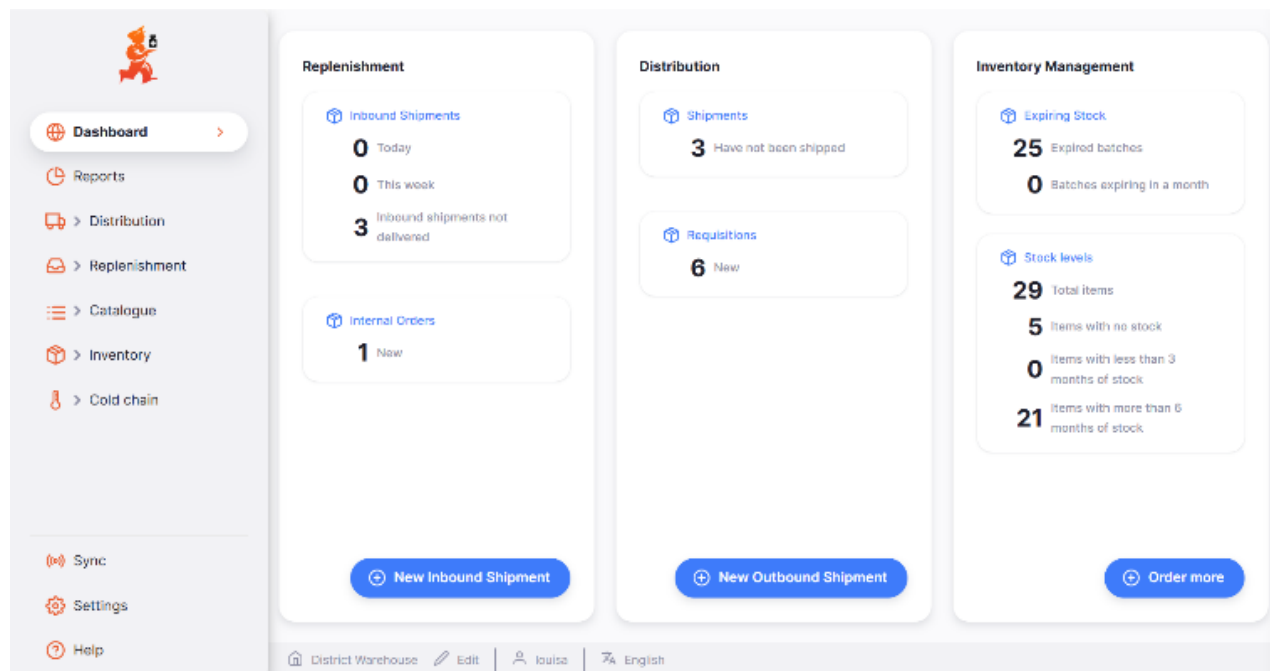
Filters Code or Name From expiry To expiry 03/04/2025 New Stock Export

Code	Name	Batch	Expiry	Location	Unit	Pack Size
030063	Acetylsalicylic Acid 100mg tabs	ser421	12/31/2016		Tablet	1
030063	Acetylsalicylic Acid 100mg tabs	abg414	12/31/2021	SA	Tablet	100
030063	Acetylsalicylic Acid 100mg tabs	arr214	12/31/2020	SA	Tablet	20
030062	Acetylsalicylic Acid 300mg tabs	def142	12/31/2020	SA	Tablet	100
030062	Acetylsalicylic Acid 300mg tabs	sgr1251	12/31/2024		Tablet	30
030062	Acetylsalicylic Acid 300mg tabs	dew124	12/31/2016		Tablet	1
030062	Acetylsalicylic Acid 300mg tabs	def142	12/31/2020		Tablet	10
030062	Acetylsalicylic Acid 300mg tabs	deg341	12/31/2022	SA	Tablet	10
030453	Amoxicillin 250mg tabs	rtt425	12/31/2020	SB	Tab	10

Showing 1-20 of 25 Rows per page: 20 < 1 2 >

District Warehouse Edit | Louisa English

Great! Your View Stock list is now in alphabetical order making it easier to make decisions based on each item. Select **Dashboard** to return to the Home Page.



Now, let's take a quick look at what else is on your dashboard.

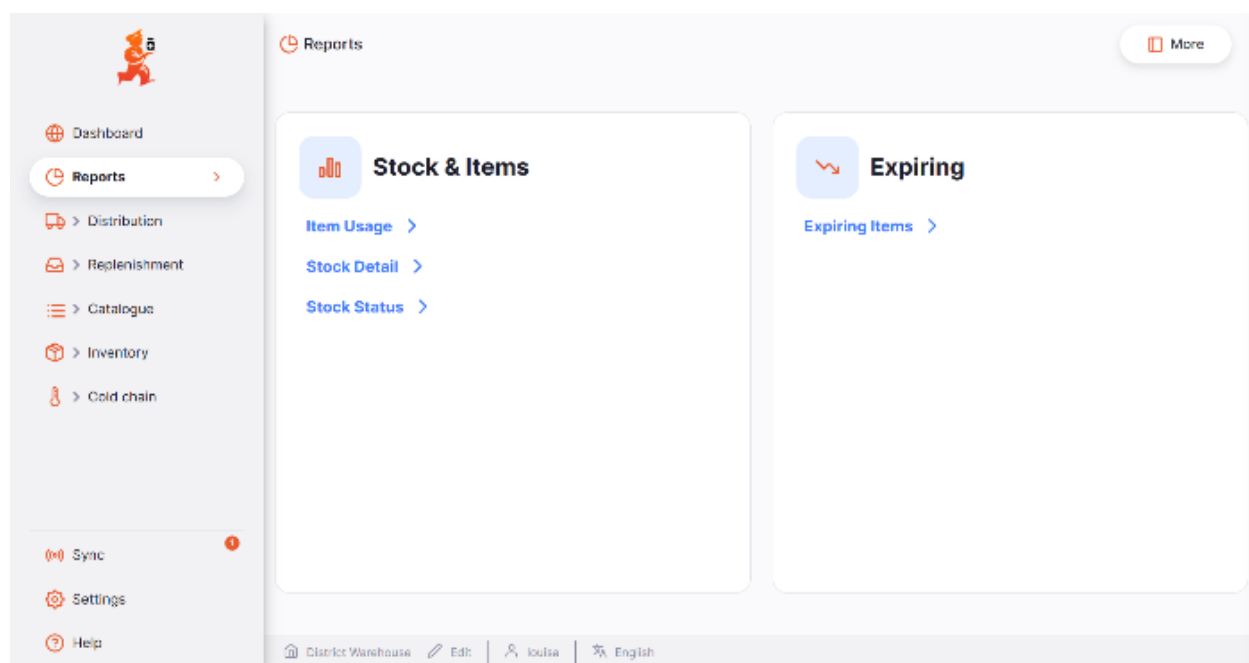
Here, you can see how many orders have come into your store and how many are still waiting to be delivered.

You can also see what orders have not been shipped

And what orders are still waiting to be processed.

Just like the expired batches we looked at earlier, selecting on these will take you to a detailed page for that topic.

Now let's take a look at our store **Reports**.



Reports can provide valuable insights such as information about your stock levels, usage and expiring items to help manage inventory efficiently.

For example, let's take a look at the **Stock Status** report.

Report Filters

You can customize what is shown on the report by specifying some of the optional details below. Click OK to view the report.

Item code:

Item name:

AMC Lookback Period:

Target MOS:

Reorder threshold MOS:

Sort by:

Sort direction:

For now, we will continue without any filters. Select **OK**.

Reports / Stock Status

[How to read this report? >](#)

Code	Name	Status	Consumption (12 months)	SOH	AMC (12 months)	MOS
030063	Acetylsalicylic Acid 100mg tabs	Overstocked	1761	66444	146.8	448.7
030062	Acetylsalicylic Acid 300mg tabs	Understocked	15022	2103	1251.8	1.4
030453	Amoxicillin 250mg tabs	Overstocked	360	32977	30	1048.2
050457	Amoxicillin Dry Powder for Suspension 125mg/5ml Bot/100ml	Overstocked	32	5221	2.7	1957.9
201116	Bandage W.O.W. 15cm wide x 5m roll	Out of stock	640	0	53.3	0
047288	Benzyl penicilin Injection 1000000 Unit	Overstocked	681	1489	56.8	26.2
047290	Benzyl penicilin Injection 500,000 Unit (300 mg)	Overstocked	70	6800	5.8	1165.7
031661	Captopril scored 25mg tabs	Well stocked	3000	1000	250	4
clinda001	Clindamycin 500mg Injection	Overstocked	94	1040	7.8	132.8
COPUD	Copper IUD	No consumption	0	0	0	0
dtpvax	DTP Vaccine, 10 doses	Overstocked	20	214	1.7	128.4
dtohehhib	DTP-HEPB-HIB (Penta) Vaccine, 1 dose	Overstocked	22	141	1.8	76.9

District Warehouse | Edit | Louisa | English

The **Stock Status Report** provides a clear overview of current inventory levels, stock movement and availability.

Quickly see what your stock availability is like to help prioritize your orders.

See real-time data of the amount of stock used in your store over a defined period - in this case, over 12 months.

View estimations of how long your stock will last based on your usage trends.

Now select **How to read this report** to learn more about key information in the report.

- Dashboard
- Reports
- > Distribution
- > Replenishment
- > Catalogue
- > Inventory
- > Cold chain
- Sync
- Settings
- Help

Reports / Stock Status

How to read this report? [▼](#)

Status descriptions:

- * Understocked - MOS is lower than min MOS (store preference: threshold for understock)
- * Overstocked - MOS is higher than max MOS (store preference: threshold for overstock)
- * Out of stock - SOH is 0 and AMC is > 0
- * Well stocked - MOS is between min and max MOS
- * No consumption - AMC is 0

Code	Name	Status	Consumption (12) months	SOH	AMC (12) months	MOS
030063	Acetylsalicylic Acid 100mg tabs	Overstocked	1761	66444	146.8	448.7
030062	Acetylsalicylic Acid 300mg tabs	Understocked	15022	2103	1251.8	1.4
030453	Amoxicillin 250mg tabs	Overstocked	360	32977	30	1048.2
050457	Amoxicillin Dry Powder for Suspension 125mg/5ml Bot/100ml	Overstocked	32	5221	2.7	1957.9
201116	Bandage W.O.W. 15cm wide x 5m roll	Out of stock	640	0	53.3	0
047288	Benzyl penicillin Injection 1000000 Unit	Overstocked	681	1489	56.8	26.2
047290	Benzyl penicillin Injection 500,000 Unit (300 mg)	Overstocked	70	6800	5.8	1165.7
031661	Captopril scored 25mg tabs	Well stocked	3000	1000	250	4
clinda001	Clindamycin 500mg Injection	Overstocked	94	1040	7.8	132.8

District Warehouse | Edit | louisa | English

Descriptions are available to help you understand meanings of different terminology and formulas used in the report (if any).

You can now see how Open mSupply can provide you with stock data to improve your inventory management. Selecting menu items displays related tasks. For example, the **Distribution** button helps manage stock movement out of your store.

Select **Distribution** to see what tasks are available here.

- Dashboard
- Reports
- > Distribution
 - Outbound Shipments
 - Requisitions
 - Customer Returns
 - Customers
- > Replenishment
- > Catalogue
- > Inventory
- Sync
- Settings
- Help

Reports / Stock Status

How to read this report? [▶](#)

Code	Name	Status	Consumption (12) months	SOH	AMC (12) months	MOS
030063	Acetylsalicylic Acid 100mg tabs	Overstocked	1761	66444	146.8	448.7
030062	Acetylsalicylic Acid 300mg tabs	Understocked	15022	2103	1251.8	1.4
030453	Amoxicillin 250mg tabs	Overstocked	360	32977	30	1048.2
050457	Amoxicillin Dry Powder for Suspension 125mg/5ml Bot/100ml	Overstocked	32	5221	2.7	1957.9
201116	Bandage W.O.W. 15cm wide x 5m roll	Out of stock	640	0	53.3	0
047288	Benzyl penicillin Injection 1000000 Unit	Overstocked	681	1489	56.8	26.2
047290	Benzyl penicillin Injection 500,000 Unit (300 mg)	Overstocked	70	6800	5.8	1165.7
031661	Captopril scored 25mg tabs	Well stocked	3000	1000	250	4
clinda001	Clindamycin 500mg Injection	Overstocked	94	1040	7.8	132.8
COPIUD	Copper IUD	No consumption	0	0	0	0
dtpvax	DTP Vaccine, 10 doses	Overstocked	20	214	1.7	128.4
dtphebbib	DTP-HEPB-HIB (Penta) Vaccine, 1 dose	Overstocked	22	141	1.8	78.9

District Warehouse | Edit | louisa | English

Here, you can track and manage items being sent out of your store.

Here, you can view and process stock requests from customers.

If customers return stock back to you, you can handle and track this here.

You can also see something similar for replenishment, too.

Replenishment helps you handle stock that are coming into your store.

Let's have a quick look. Select on **Replenishment** to see what tasks are available.

Here you can manage your incoming stock deliveries.

Here you can request stock for your own store from another facility.

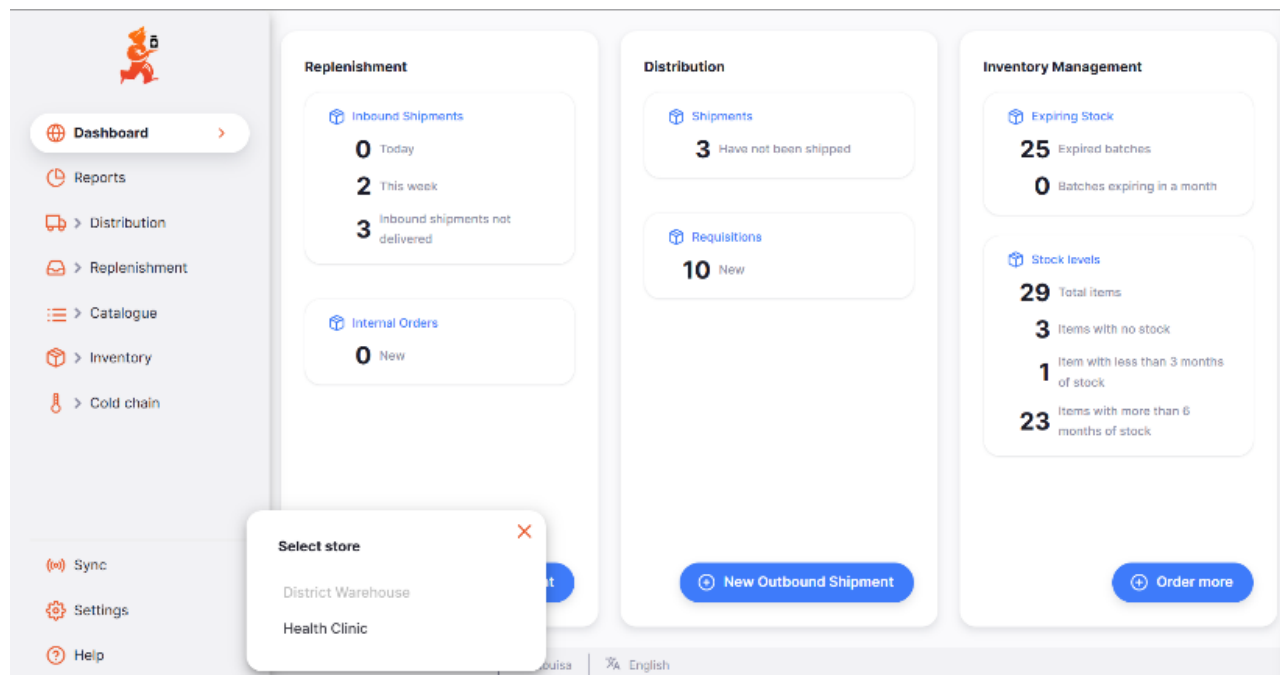
If you would like to return stock that you have received from others, you can manage this here.

Now that was a quick overview of how Open mSupply tracks stock. Remember this is all real-time and it means you do not need to count anything as the system will do this all of you.

We will cover how much each of the functions are used in future courses.

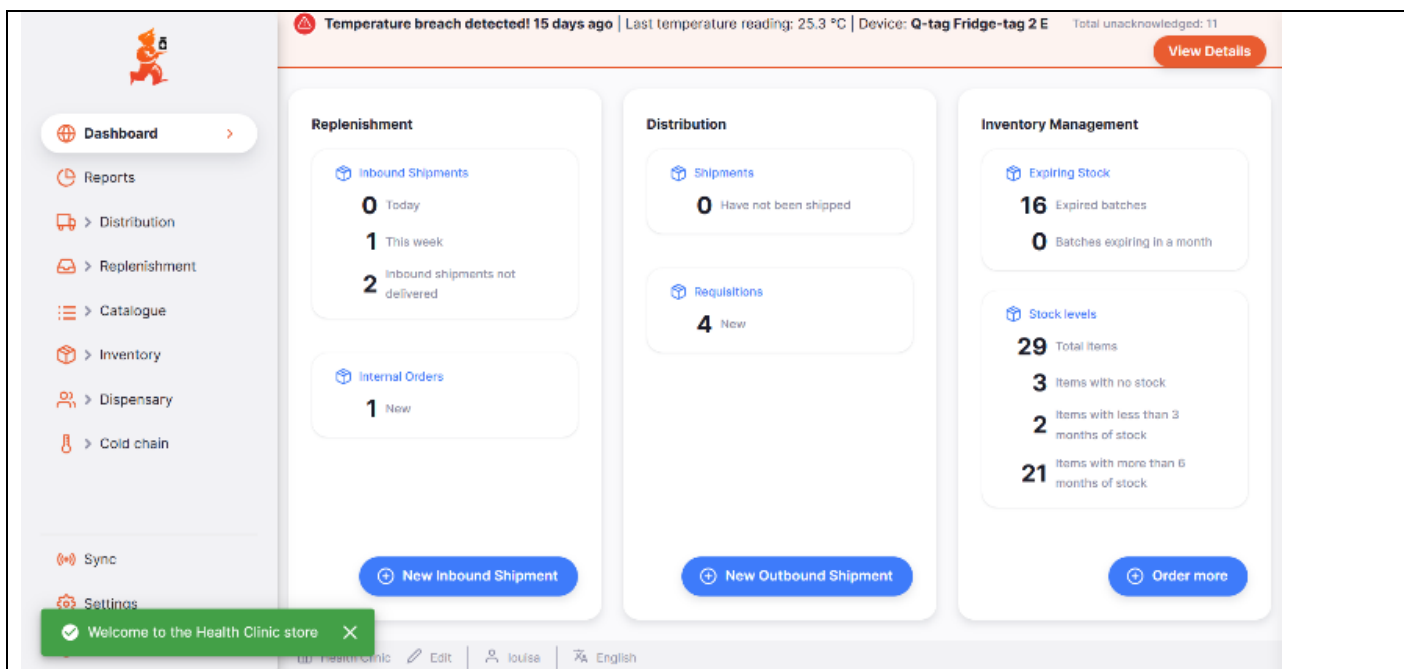
Now let's return back to the dashboard. Select on the **Dashboard** button.

This user has access to multiple stores. Let's try switching to one of these. Select the store.

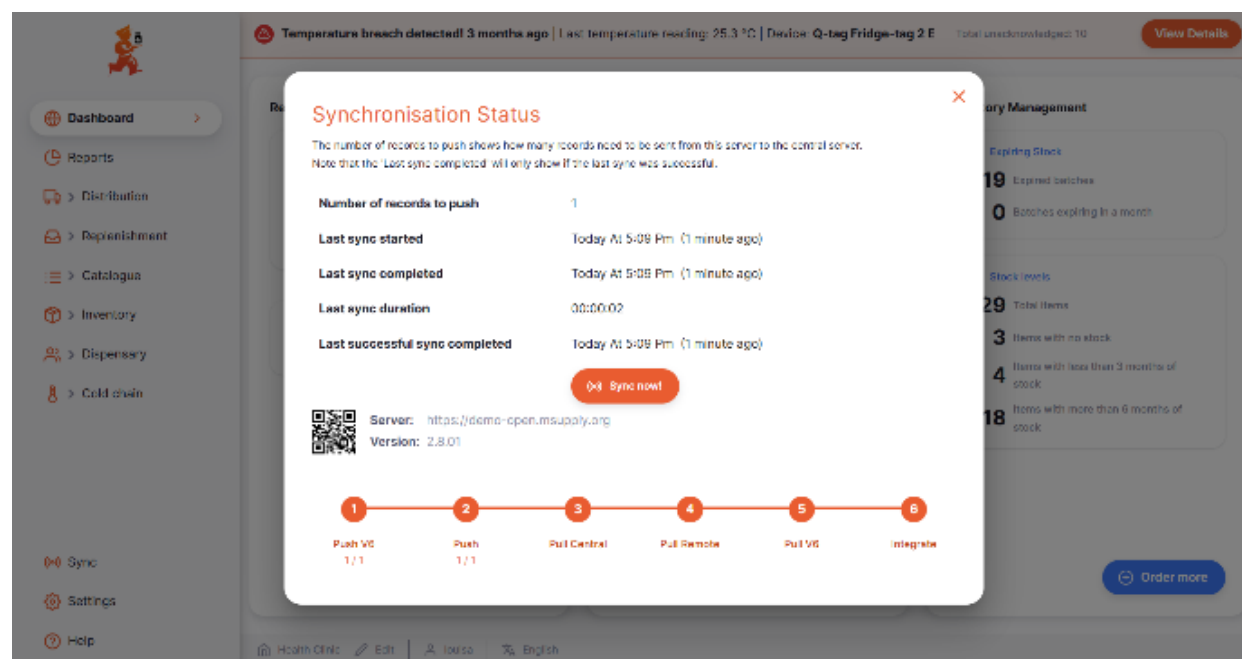


Select **Health Clinic** to switch to this store.

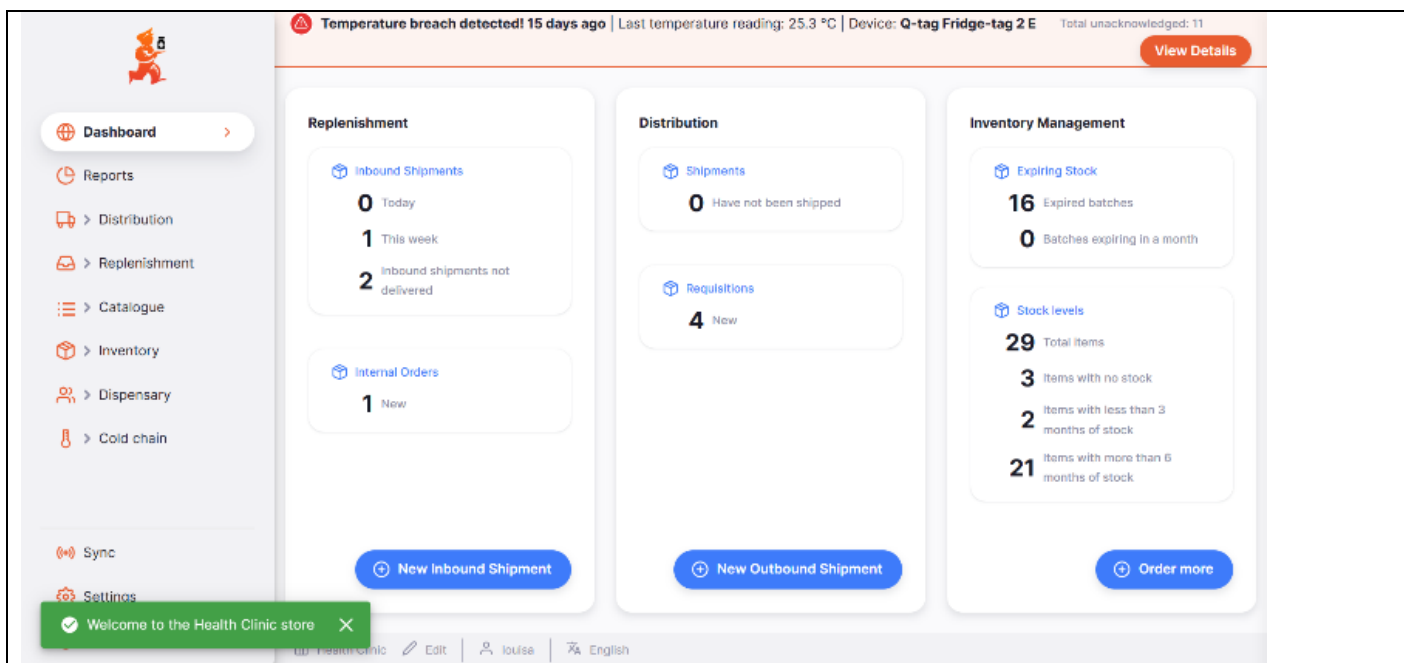
You are in the Health Clinic store.



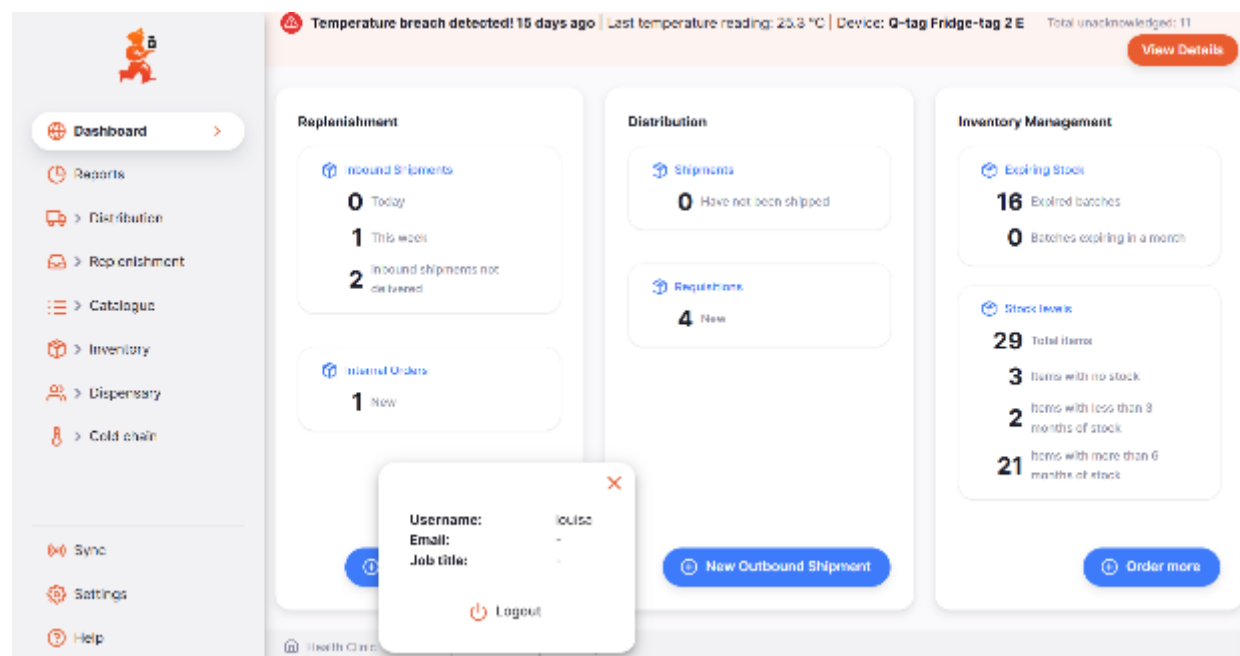
You can also select the Language button to switch languages.
Select the **Sync** button to perform a manual sync.



Select the **Sync now!** button.
We can now see that syncing is in progress.
Once sync is complete, select the **x** to exit out of this screen.



For now, we will continue with the course and you will see more of Open mSupply as we go along. Let's log out. Select on your user.

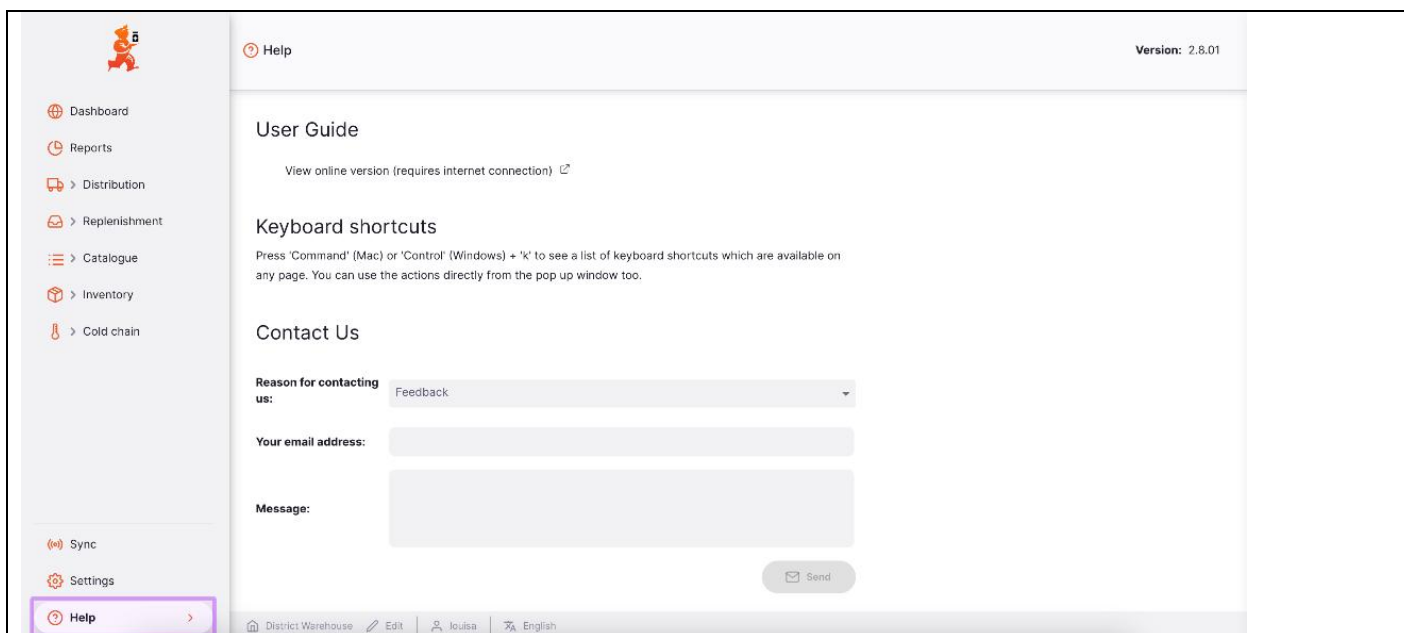


Select **Logout**.

Remember, Open mSupply **syncs automatically** without you needing to perform a manual sync. However, it can be useful to do this if you've just reconnected to the internet and need up-to-date stock data before placing an order, issuing stock, or checking reports.

Using the "Help" Button

The **Help** button in Open mSupply gives you quick access to support tools and resources when you need assistance.



Here's what you can do on the "Help" page:

1. View the User Guide

Select the link to open the online documentation. You'll need an internet connection to access it. This guide is regularly updated with the latest instructions and screenshots.

2. Contact Support or Give Feedback

Use the contact form to:

- Send Feedback about your experience using the system
- Request Support if you run into a technical issue

To use this form, select your reason, enter your email address, type your message, and then **Send**.

Knowledge Check

Question 1

What does the Dashboard help you track in Open mSupply?

- System updates
- Patient prescriptions
- Password settings
- Replenishment, distribution, and inventory

Question 2

Which of the following actions can you perform directly from the Dashboard? Select all that apply.

- Add a new item to your master list
- See all expired stock
- Create a new inbound shipment
- Change your user permissions

Question 3

Why might you use the "Stock Status" report?

- To review current inventory and usage
- To register a new user
- To update passwords
- To report bugs in the system

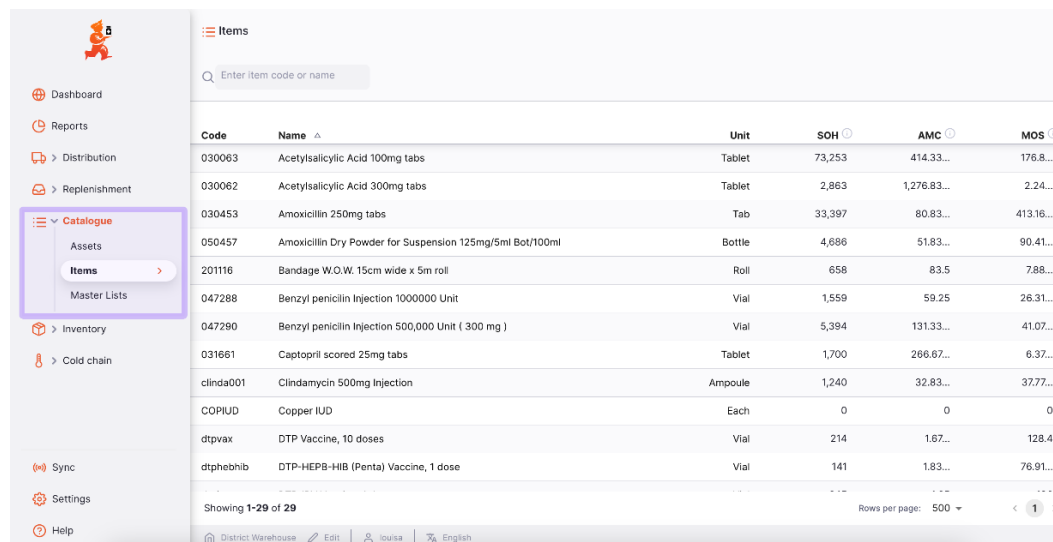
Question 4

True or False: You can sort item names alphabetically in the stock list.

- ☐ True
- ☐ False

Session 8: Catalogue

The **Catalogue** serves as a central list of all items, assets, and master lists available to your store. It provides an organized and comprehensive view of resources, enabling you to access available items easily. The Catalogue is essential for managing your store's inventory and ensuring that only authorized and listed items are ordered, used, or tracked.



Code	Name	Unit	SOH	AMC	MOS
030063	Acetylsalicylic Acid 100mg tabs	Tablet	73,253	414.33...	176.8...
030062	Acetylsalicylic Acid 300mg tabs	Tablet	2,863	1,276.83...	2.24...
030453	Amoxicillin 250mg tabs	Tab	33,397	80.83...	413.16...
050457	Amoxicillin Dry Powder for Suspension 125mg/5ml Bot/100ml	Bottle	4,686	51.83...	90.41...
201116	Bandage W.O.W. 15cm wide x 5m roll	Roll	658	83.5	7.88...
047288	Benzyl penicillin Injection 1000000 Unit	Vial	1,559	59.25	26.31...
047280	Benzyl penicillin Injection 500,000 Unit (300 mg)	Vial	5,394	131.33...	41.07...
031661	Captopril scored 25mg tabs	Tablet	1,700	266.67...	6.37...
clinda001	Clindamycin 500mg Injection	Ampoule	1,240	32.83...	37.77...
COPUIUD	Copper IUD	Each	0	0	0
dtprvax	DTP Vaccine, 10 doses	Vial	214	1.67...	128.4
dtprhehib	DTP-HEPB-HIB (Penta) Vaccine, 1 dose	Vial	141	1.83...	76.91...

The Catalogue includes the ability to view assets, items and masterlists for your store.

Why is the Catalogue Important?

The Catalogue is crucial for several reasons:

1. Centralized Inventory Management

It keeps track of all products and assets, ensuring that your store's stock is well-organized and that you always know what you have in inventory.

2. Order Management

If an item is listed in the Catalogue, it can be easily ordered, tracked, and replenished as needed. If an item is missing from the Catalogue, you won't be able to order or manage it directly, making it necessary to request the Central Store to add it to the master list.

3. Efficiency and Accuracy

By relying on a single, centralized Catalogue, Open mSupply helps streamline processes, reduce errors, and ensure consistent product information across all stores.

Assets

The **Assets** tab lists cold chain equipment managed by your facility. Each asset entry includes details like:

- **Type** (e.g., Cold room, refrigerator)
- **Manufacturer and Model**
- **Category and Sub-catalogue**
- **Code** for internal tracking

Use this section to monitor and audit cold chain equipment performance and inventory. You can filter and export the asset list as needed. This is especially useful for cold chain officers managing vaccine refrigeration units and temperature-sensitive stock.

Items

The **Items** tab is your full inventory list of stock tracked in Open mSupply. This includes:

- Medicines
- Vaccines
- Consumables
- Devices and other supplies

You can see:

- **SOH** (Stock on Hand)
- **AMC** (Average Monthly Consumption)
- **MOS** (Months of Stock)

This list gives a quick overview of how much stock is available, how fast it's being used, and what needs to be reordered soon. You can also search by name or code, or export the list for offline review.

Select an item to view detailed information, including its specifications, associated master lists, and full transaction history in the item ledger.

Item Ledger

The **Item Ledger** is a detailed log that records **every transaction** for a specific item — including receipts, issues, repacks, and stock adjustments.

It's your complete view of how the item has moved through your store over time — like the item's **audit trail**.

Type	Invoice Number	Date	Time	Name	Status	Expiry	Batch	Pack Size	Number of packs	Unit Qty	Balance	Pack cost price	Pack sell price	Unit
Repack	7	28/06/2025	00:55	Repack	Verified	30/06/2018	1234	30	1	30	2863	\$0.00	\$0.00	\$
Repack	7	28/06/2025	00:55	Repack	Verified	30/06/2018	1234	1	30	-30	2833	\$0.00	\$0.00	\$
Inbound Shipments	18	23/06/2025	16:51	District Dispensary	Delivered	30/06/2018	1234	1	30	30	2863	\$0.00	\$0.00	\$
Inbound Shipments	5	23/06/2025	12:54	Health Clinic	Delivered	31/12/2025	vd352	1	20	20	2833	\$0.12	\$0.12	\$
Inbound Shipments	5	23/06/2025	12:54	Health Clinic	Delivered	31/12/2028	ser123	1	10	10	2813	\$0.12	\$0.12	\$
Outbound Shipments	36	24/03/2025	21:46	Eastern Village	Shipped	30/04/2028	fre3502	1	300	-300	2803	\$0.08	\$0.08	\$
Inbound Shipments	16	24/03/2025	21:43	Global Donor	Delivered	30/04/2028	fre3502	1	1000	1000	3103	\$0.08	\$0.08	\$
Inventory Reduction	5	04/03/2025	09:42	Inventory Adjustment	Verified	31/12/2020	def142	100	80	-8000	2103	\$1.70	\$1.40	\$
Outbound Shipments	35	03/03/2025	15:38	Eastern Village	Shipped	31/12/2030	gry444	1	80	-80	10103	\$0.25	\$0.25	\$
Outbound Shipments	35	03/03/2025	15:38	Eastern Village	Shipped	31/12/2029	awe132	100	100	-10000	10183	\$1.20	\$1.00	\$
Outbound Shipments	35	03/03/2025	15:38	Eastern Village	Shipped	31/12/2028	gth563	1	90	-90	20183	\$0.25	\$0.25	\$
Outbound Shipments	35	03/03/2025	15:38	Eastern Village	Shipped	31/12/2028	ser123	1	2	-2	20273	\$0.12	\$0.12	\$

To view the item ledger, go to **Catalogue** → **Items** → Select the item → **Ledger**

Why It Matters

The ledger allows you to:

- See exactly where stock came from and where it went
- Track stock levels, batches, and expiry dates
- Investigate supply issues or errors
- Confirm prices and pack configurations
- Review repacking activities and how they affected balances

Tip: Think of the ledger as the item's paper trail. If you ever need to answer, "*Where did this stock come from?*" or "*Why did our balance drop?*" — this is the first place to look.

Master Lists

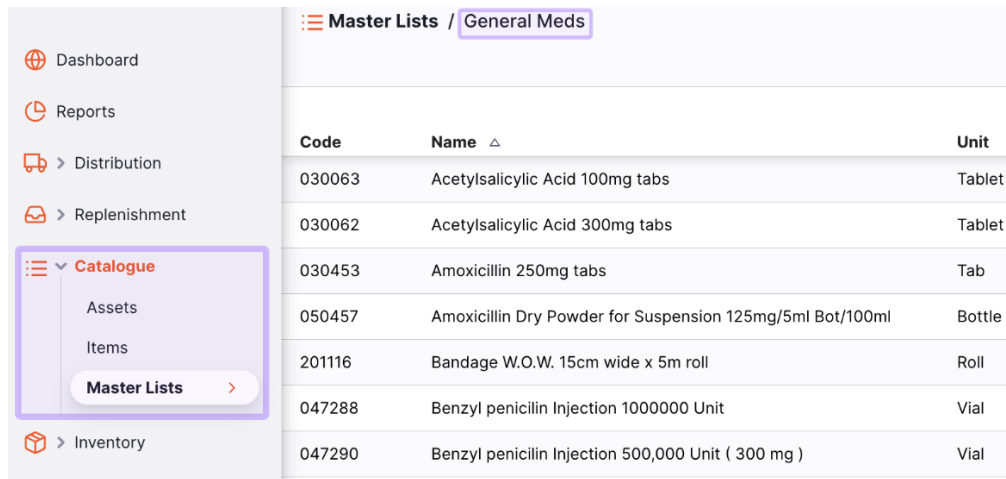
Master Lists define standard sets of items that should be stocked for specific purposes. These lists help:

- Ensure consistent stock management

- Simplify requisition forms
- Support programmatic reporting

Each store can be linked to one or more master lists depending on its role in the supply chain.

You can view your masterlists and the items inside them.



Master Lists / General Meds		
Code	Name	Unit
030063	Acetylsalicylic Acid 100mg tabs	Tablet
030062	Acetylsalicylic Acid 300mg tabs	Tablet
030453	Amoxicillin 250mg tabs	Tab
050457	Amoxicillin Dry Powder for Suspension 125mg/5ml Bot/100ml	Bottle
201116	Bandage W.O.W. 15cm wide x 5m roll	Roll
047288	Benzyl penicilin Injection 1000000 Unit	Vial
047290	Benzyl penicilin Injection 500,000 Unit (300 mg)	Vial

Master Lists are often defined by national policies or donor requirements and are essential for standardized ordering.

Knowledge Check

Question 1

What is the primary function of the Catalogue in a store?

- a) To track sales data
- b) To serve as a central list of all items and assets
- c) To manage customer records
- d) To provide customer service support

Question 2

What does the 'Items' tab help you monitor?

- a) Customer satisfaction ratings
- b) Stock on Hand (SOH)
- c) Cold Chain Assets
- d) Monthly payroll expenses

Question 3

True or False: Master Lists are essential for standardized ordering in inventory management.

- False
- True

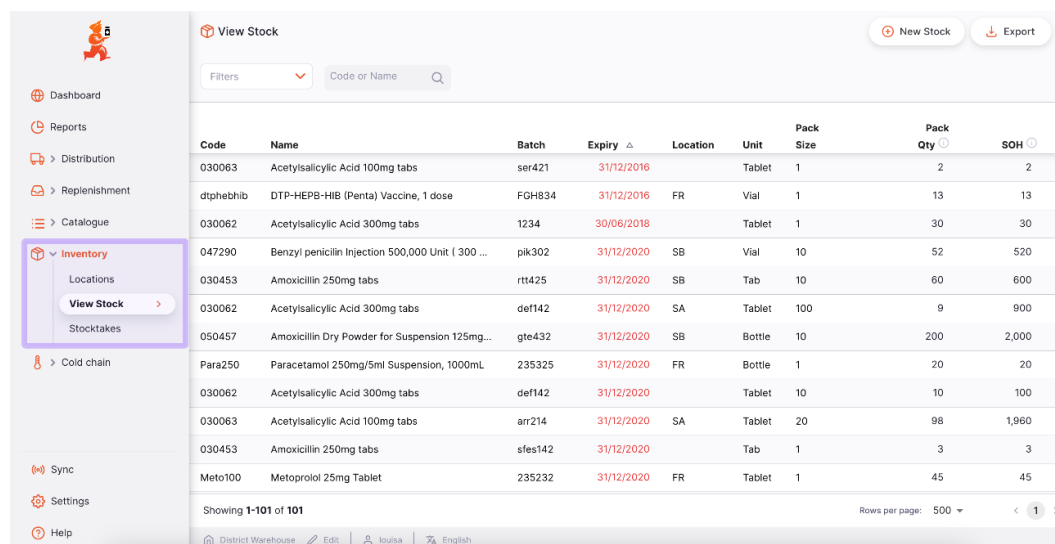
Question 4

How can the information in the 'Items' section assist inventory managers?

- a) By calculating sales forecasts
- b) By managing supplier contracts
- c) By tracking employee schedules
- d) By identifying potential stockouts

Session 9: View Stock

Now that you understand how items are listed in your store's catalogue, let's see how we can view the actual stock you have on hand. Unlike the item catalogue, which displays every item your store is authorised to manage (even if you have none in stock), **View Stock** is focused only on the items that physically exist in your store.



Code	Name	Batch	Expiry	Location	Unit	Pack Size	Pack Qty	SOH
030063	Acetylsalicylic Acid 100mg tabs	ser421	31/12/2016		Tablet	1	2	2
dtphbhib	DTP-HEPB-HIB (Penta) Vaccine, 1 dose	FQH834	31/12/2016	FR	Vial	1	13	13
030062	Acetylsalicylic Acid 300mg tabs	1234	30/06/2018		Tablet	1	30	30
047290	Benzy/ penicillin Injection 500,000 Unit (300 ...	pik302	31/12/2020	SB	Vial	10	52	520
030453	Amoxicillin 250mg tabs	rtt425	31/12/2020	SB	Tab	10	60	600
030062	Acetylsalicylic Acid 300mg tabs	def142	31/12/2020	SA	Tablet	100	9	900
050457	Amoxicillin Dry Powder for Suspension 125mg...	gte432	31/12/2020	SB	Bottle	10	200	2,000
Para250	Paracetamol 250mg/5ml Suspension, 1000mL	235325	31/12/2020	FR	Bottle	1	20	20
030062	Acetylsalicylic Acid 300mg tabs	def142	31/12/2020		Tablet	10	10	100
030063	Acetylsalicylic Acid 100mg tabs	arr214	31/12/2020	SA	Tablet	20	98	1,960
030453	Amoxicillin 250mg tabs	sfes142	31/12/2020		Tab	1	3	3
Meto100	Metoprolol 25mg Tablet	235232	31/12/2020	FR	Tablet	1	45	45

To see the stock that is currently in your store, go to **Inventory** → **View Stock**

Understanding the View Stock page

Each row in the **View Stock** page is called a **Stock line**. A stock line represents one batch of an item that's currently available in your store — with a specific expiry date, quantity, location, and packaging.

- If you have multiple batches of the same item, you'll see multiple stock lines.
- If you **repack** an item, the system will **create a new stock line** for the repacked quantity.
- Even if an item is the same, different pack sizes, batches, or locations will each appear as separate stock lines.

Example: One item could appear as three stock lines if it exists in three different batches or has been repacked into different units.

Let's take a look at the different fields in the **View Stock** page:

- Dashboard
- Reports
- Distribution
- Replenishment
- Catalogue
- Inventory
 - Locations
 - View Stock**
 - Stocktakes
- Cold chain
- Sync
- Settings
- Help

View Stock

New Stock
Export

Filters
Code or Name

Code	Name	Batch	Expiry	Location	Unit	Pack Size	Pack Qty	SOH
030063	Acetylsalicylic Acid 100mg tabs	ser421	31/12/2016		Tablet	1	2	2
dtphbhib	DTP-HEPB-HIB (Penta) Vaccine, 1 dose	FGH834	31/12/2016	FR	Vial	1	13	13
030062	Acetylsalicylic Acid 300mg tabs	1234	30/06/2018		Tablet	1	30	30
047290	Benzyl penicillin Injection 500,000 Unit (300 ...	pik302	31/12/2020	SB	Vial	10	52	520
030453	Amoxicillin 250mg tabs	rtt425	31/12/2020	SB	Tab	10	60	600
030062	Acetylsalicylic Acid 300mg tabs	def142	31/12/2020	SA	Tablet	100	9	900
050457	Amoxicillin Dry Powder for Suspension 125mg...	gte432	31/12/2020	SB	Bottle	10	200	2,000
Para250	Paracetamol 250mg/5ml Suspension, 1000mL	235325	31/12/2020	FR	Bottle	1	20	20
030062	Acetylsalicylic Acid 300mg tabs	def142	31/12/2020		Tablet	10	10	100
030063	Acetylsalicylic Acid 100mg tabs	arr214	31/12/2020	SA	Tablet	20	98	1,960
030453	Amoxicillin 250mg tabs	sfs142	31/12/2020		Tab	1	3	3
Meto100	Metoprolol 25mg Tablet	235232	31/12/2020	FR	Tablet	1	45	45

Showing 1-101 of 101
Rows per page: 500
1

District Warehouse
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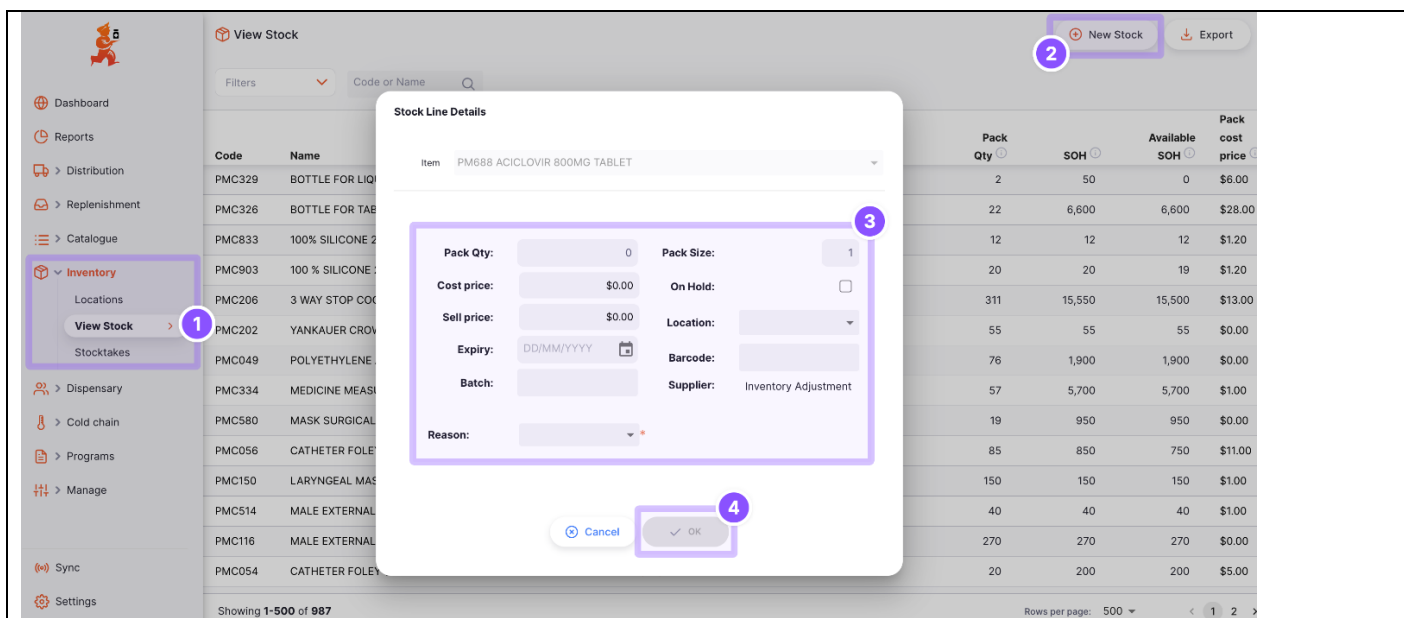
You can scroll **horizontally** to view additional details (e.g. costs or suppliers) or you can scroll **vertically** to see more items in the list.

Field	What it shows
Item code & name	The medicine or item in stock
Batch & expiry	Expiry date for that specific batch (expired ones are shown in red)
Location	Where the stock is physically stored
Pack size & unit	How the item is packed (e.g., bottles of 100 tablets)
Stock on hand	The total quantity you currently have for that particular stockline
Cost & total value	Unit cost and total value of the stock
Supplier	Where the stock came from

Tip: The "View Stock" page is helpful for checking individual batches and tracking where specific stock is located. However, if you want to see the total SOH (**Stock on Hand**) for an item, go to the **Catalogue --> Item** page, as this will aggregate all batches and stock lines for each item, making it easier to see overall quantities.

Creating New Stock

The **New Stock** button lets you manually add a new batch of stock into the system. This can be helpful in situations where stock isn't entered automatically through a supplier delivery, and you need to use the stock urgently.



To create a new stockline, select **New Stock**, then enter the stock line details and select **OK**.

Examples of When to Use It

You discover a missing item that is physically in stock but not in the system.

You need to urgently record goods that were supplied, but the delivery wasn't captured — for example, if the supplier isn't set up in the system yet, or no official shipment was processed.

Filling in the Stock Line Details

Field	What it means
Item	Choose the item from your catalogue. This is the product you're adding stock for.
Pack Quantity	How many packs you are adding (e.g., 10 bottles of 100 tablets).
Pack Size	How many units are in each pack (e.g., 100 tablets per bottle).
Cost Price	Cost price per pack. Price you were charged for the pack.
Sell Price	Sell price per pack. Price you are selling the pack for.
Expiry	The expiration date of the batch.
Batch	Batch number (for traceability and recall tracking).
Location	Where the stock will be stored (choose a shelf, fridge, etc.).
On Hold	Tick this if the stock should not be used (e.g., damaged or needs inspection).
Barcode	Optional – only if you're using barcode scanning.
Supplier	Where the stock came from.
Reason	If you have reasons set, select a reason for the new stock.

Best Practices:

- Always fill in batch and expiry for traceability.
- Use accurate pack size and quantity to avoid inventory errors.
- Select the right reason so reports reflect why this stock was added.

Be Careful! Only use the "New Stock" button when you are certain the stock physically exists and has not already been entered, as adding stock that doesn't exist can lead to serious inventory errors and incorrect reporting.

Supplier and Customer Details

To see information about the customers or suppliers available in your system, go to the relevant section from the navigation menu (**Customers** or **Suppliers**).

The **Home** icons indicate that these stores are on mSupply.

The screenshot shows the mSupply interface. On the left is a navigation menu with icons and labels: Dashboard, Reports, Distribution (with a sub-menu: Outbound Shipments, Requisitions, Customer Returns, Customers), Replenishment (with a sub-menu: Inbound Shipments, Internal Orders, Supplier Returns, Suppliers), and a Home icon. The 'Suppliers' link in the Replenishment sub-menu is highlighted with a purple box and a circled '1'. The main area displays a table titled 'Suppliers' with columns 'Code' and 'Name'. The table contains four rows: 'CD' (District Dispensary), 'GD' (Global Donor), 'GS' (Global Supplier), and 'CHC' (Health Clinic). The 'CD' row is highlighted with a purple box and a circled '2'. Below the table, it says 'Showing 1-4 of 4' and 'Rows per page: 500'. The 'Customers' link in the Distribution sub-menu is also highlighted with a purple box and a circled '1'.

Code	Name
CD	District Dispensary
GD	Global Donor
GS	Global Supplier
CHC	Health Clinic

Selecting a name will show more details of the selected supplier or customer, like their code and contact information.

District Dispensary

Code:	CD	Date Created:	
Charge Code:	CD	Manufacturer:	<input type="checkbox"/>
Country:		Donor:	<input type="checkbox"/>
Comment:		On Hold:	<input type="checkbox"/>
Phone:		Address:	1A Kowhai Road, Totara Park
Website:	districtdispensary.openmsupply.org		

This information helps you verify identities, track supply relationships, and ensure transactions are correctly linked to the right organisations. It also provides transparency in case of audits, reporting, or troubleshooting delivery issues.

If a customer or supplier is missing from your list, you may need to contact the person responsible for managing records on the **Central Server** and make a request for the customer or supplier to be added.

Knowledge Check

Question 1

What does the 'View Stock' screen focus on?

- a) Items waiting to be ordered
- b) Items that are currently in stock
- c) Items out of stock
- d) All items listed in the catalogue

Question 2

Which of the following is NOT a field displayed on the 'View Stock' page?

- a) Item code & name
- b) Batch & expiry
- c) Supplier contact information
- d) Stock on hand

Question 3

You need to record stock that was supplied but not captured due to a missing supplier setup. What action should you take?

- a) Wait for the supplier to be added to the system
- b) Use the 'New Stock' button to manually add the stock
- c) Remove items from the physical stock
- d) Bulk upload items later

Question 3

You need to record stock that was supplied but not captured due to a missing supplier setup. What action should you take?

- a) Wait for the supplier to be added to the system
- b) Use the 'New Stock' button to manually add the stock
- c) Remove items from the physical stock
- d) Bulk upload items later

Session 10: Inventory Management

Before diving into how to use Open mSupply, it's important to understand the workflow that powers the system. The workflow represents the series of steps involved in managing a healthcare supply chain — from receiving stock to fulfilling orders, tracking inventory, and making data-driven decisions. Understanding this workflow will help you see how each function in the system fits together, ensuring a smooth and efficient process.

Inventory Management

The first step in managing a healthcare supply chain is efficient inventory management.

Inventory management encompasses tracking stock quantities, expiry dates, batches, and storage locations to guarantee that everything is accounted for and easily accessible.

Effective inventory management ensures that you always have the right products in stock without overstocking, reducing the risk of shortages or wastage, and ultimately contributing to better healthcare outcomes.

Key Concepts of Inventory Management

- **Stock on Hand (SOH)**

What it is: Stock on Hand (SOH) refers to the total number of units of each item available at any given time. Keeping track of your SOH ensures that you know how much of each product is on hand and whether it is enough to meet demand.

Why it's important: Accurate stock tracking helps prevent stockouts (when you run out of essential items) or overstocking (where you have excess stock, leading to waste or expired goods). Regularly updating SOH also allows you to maintain optimal levels and avoid last-minute rushes to reorder products.

- **Expiry Dates**

What it is: Expiry dates indicate the point at which medicines or vaccines should no longer be used, as their effectiveness may decrease, or they may potentially become harmful. Expiry tracking involves monitoring these dates to ensure that products are used before they reach their expiration dates.

You'll often notice that many expiry dates on medicines are listed by month and year only. In these cases, the general rule is that the product should be considered expired at the end of the given month. For example, if a medicine's expiry date is listed as **March 2025**, it is typically considered expired on **March 31, 2025**.

Why it's important: Managing expiry dates is especially crucial for items like vaccines, where the effectiveness can diminish over time. By proactively managing expiry dates, you can reduce waste, optimize stock usage, and help ensure patient safety.

- **Batch Numbers**

What it is: Batch numbers identify a specific group of products that were produced together under the same conditions. Each batch is typically assigned a unique identifier, allowing for traceability in case of quality issues or recalls.

Why it's important: Batch tracking allows you to identify and trace products if there are issues related to quality, recalls, or adverse reactions. This is especially important for pharmaceuticals, where safety and regulatory requirements are critical. By tracking batches, you can also manage the distribution of goods more effectively.

- **Storage Locations**

What it is: Storage locations refer to the physical spaces where stock is stored, such as shelves, refrigerators, or warehouses. In inventory management, these locations are mapped and categorized to ensure stock is organized, easily accessible, and stored under the correct conditions. Storage locations are often categorized based on specific needs, such as temperature-sensitive areas for vaccines, cool storage for medicines, or dedicated spaces for emergency stock.

Why it's important: Proper management of storage locations ensures that stock is kept under the appropriate conditions and can be easily found when needed. For example, certain items, like vaccines, need to be stored in cold storage, while other medicines might need to be kept in a cool, dry place. In addition to standard storage, it's also crucial to have designated areas for stock that needs to be quarantined or held for inspection.

- **Quarantine Storage**

What it is: Sometimes, products may need to be held separately from the main stock for safety or regulatory reasons. This is particularly true for items that are damaged, have expired, or are suspected to be defective. These items are placed in **quarantine storage** until they can be inspected or disposed of properly. This practice helps prevent the use or distribution of products that may be harmful, expired, or unfit for consumption, ensuring that they don't accidentally enter circulation.

Knowledge Check

Question 1

- a) Which aspect is crucial for effective inventory management?
- b) Having a large quantity of products.
- c) Minimizing stockouts and wastage.
- d) Ignoring data analytics.
- e) Frequent reordering of stock.

Question 2

- a) Which factor contributes to better healthcare outcomes?
- b) Increasing the number of suppliers.
- c) Reducing the volume of inventory.
- d) Ensuring the right products are always in stock.
- e) Simplifying the ordering process.

Question 3

True or False: Effective inventory management leads to increased wastage in healthcare supplies.

- ☐ False
- ☐ True

Session 11: Stocktakes

What is a Stocktake?

Stocktaking is the process of regularly counting and verifying the quantity of products in storage. It can be done monthly, quarterly, or annually, depending on the needs of the facility.

The goal is to physically check the stock levels, compare them with what is recorded in the system, and then correct them if needed.

Why are Stocktakes Important?

Regular stocktakes are crucial for identifying and correcting any discrepancies between the recorded inventory and the actual stock. These discrepancies can lead to issues such as stockouts, overstocking, or missing items. Discrepancies might happen due to human error, theft, or incorrect data entry.

By performing stocktakes on a regular basis, you can quickly spot these problems and resolve them, ensuring that your inventory records remain accurate and reliable.

How Stocktaking Works

There are different types of stocktakes, and the method you choose can depend on the size of your inventory, the frequency of stock turnover, and your facility needs.

The two main types of stocktaking are **full stocktake** and **partial stocktake**, and both come with their own procedures and considerations.

Full Stocktake

A full stocktake involves counting every single item in your inventory. This is typically done at regular intervals, such as annually or semi-annually, and it is a comprehensive process that ensures every product is accounted for.

Process of Full Stocktake

1. Preparation

All stock is temporarily taken out of circulation for the duration of the stocktake. This means no new transactions should be made during the count to avoid discrepancies.

2. Counting

Staff members count every item in the inventory. Each product's quantity is recorded manually, and the stock is compared with the recorded quantities in the system. Where procedures allow, expiry dates and batch numbers are also checked to ensure stock is still valid and accurately recorded.

3. Recording

The counted quantities are entered into the system, and any discrepancies are noted. The system is then updated to reflect the accurate stock levels.

4. Reconciliation

If discrepancies arise, the cause must be investigated. This could involve checking for human errors, misplaced stock, or even potential theft.

Why It's Important: A full stocktake ensures that your records are completely aligned with the physical stock on hand. It's especially important when you need a comprehensive snapshot of inventory levels for financial reporting, audits, or making future procurement decisions.

Partial Stocktake

A partial stocktake is done when only a portion of the inventory is counted, rather than the entire stock.

This type of stocktake is often used in situations where a full stocktake isn't feasible, such as during busy periods or when you have a large inventory.

Sometimes, people may only focus on a specific area or location, like a particular shelf, fridge, or storage unit. This makes it easier to maintain regular checks without interrupting daily operations. By doing a partial stocktake on these smaller, more manageable portions, you can ensure that high-turnover or critical stock areas are accurately monitored more frequently.

Process of Partial Stocktake

1. Scheduled Counting

Instead of doing a full stocktake, specific products, batches, or categories of items are counted on a rotating schedule. For example, you might count certain high-value items or frequently used stock items more often than others.

2. Counting and Recording

Just like with a full stocktake, the quantities of the selected items are counted and compared to the recorded data in the system.

3. Reconciliation

Discrepancies in the counted stock are resolved and updated in the system.

Why It's Important: A partial stocktake allows for regular checks without the need to halt operations completely. It can be useful for high-turnover products or for tracking critical stock levels throughout the year. However, it doesn't provide as comprehensive a view as a full stocktake, so it may need to be supplemented with a full stocktake periodically.

How to Maintain Stocktake Integrity

1. No Transactions During Stocktaking

For accurate results, stocktaking requires that **no transactions** (such as stock movements, receipts, or issues) occur while the count is being done. If transactions are made during the stocktake, it can lead to discrepancies between the physical count and the recorded stock levels, making it difficult to reconcile the data.

Why This Matters: If stock is moved in or out while the physical count is being done, the system's snapshot of stock on hand will no longer match the actual stock in your store. **Example:** If 50 units are received into the system but haven't been counted physically, the result will be a mismatch that leads to incorrect adjustments.

Best Practice: • Pause all stock transactions during a stocktake window. • Communicate the pause clearly with all staff. • If transactions are absolutely necessary, document them manually and adjust the stock levels **after** the count is entered into the system.

2. Clean Up Old or Unused Stocktakes

Open mSupply allows you to create stocktakes with a status of **NEW**, but if these are left unused or incomplete, they can cause confusion and even lead to errors.

Why This Matters • The snapshot taken when the stocktake was created quickly becomes outdated if time passes. • Continuing with an old stocktake can result in incorrect comparisons between counted and recorded quantities. • Accidentally finalising an old stocktake can cause inaccurate inventory levels, overwrite current stock data, and lead to confusion in future reporting or audits.

Best Practice: • Regularly review and delete old stocktakes marked as new. • Only start a stocktake when you're ready to carry it through to completion.

3. Review All Outstanding Outbound Shipments

Before performing a stocktake in Open mSupply, it's important to review all **outbound shipments** that are still in progress.

When stock is issued to a customer, it goes through stages:

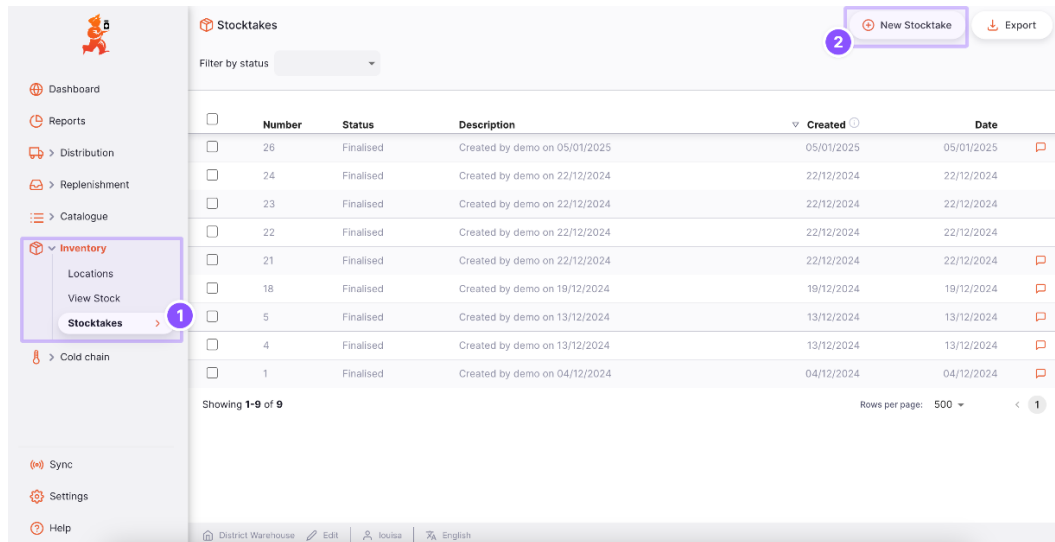
- **Allocated:** The stock is reserved but still counted as available in your inventory.
- **Picked:** The stock is physically removed from the shelf and is no longer included in stocktake totals.

- **Confirmed:** The transaction is finalized and fully deducted from your system.

Why This Matters • If stock is only **allocated**, it will still show up in your stocktake, even if it's already marked to go out. • If stock has been **picked** but **not yet confirmed**, it will not appear in the stocktake count, which can create discrepancies if it hasn't actually left the store and gets counted.

Best Practice: • If Outbound Shipments are in the allocated state (not picked), be aware that they will still appear in your stocktake and should be counted. • If Outbound Shipments are in the picked state, ensure that picked items are not on the shelf waiting to be counted, as these are not part of your stock anymore.

Creating a New Stocktake



1. Go to the menu and select: **Inventory → Stocktakes**.
2. Select "**New Stocktake**".
3. You can choose to filter the stocktake by:
 - **Master List** – to count only specific types of items from a master list.
 - **Location** – to focus on a particular storage area (e.g., a fridge or shelf).
 - **Items with Stock** – tick to include only items that currently have stock.
 - **Items Expiring Before** – optional filter to target items near expiry.

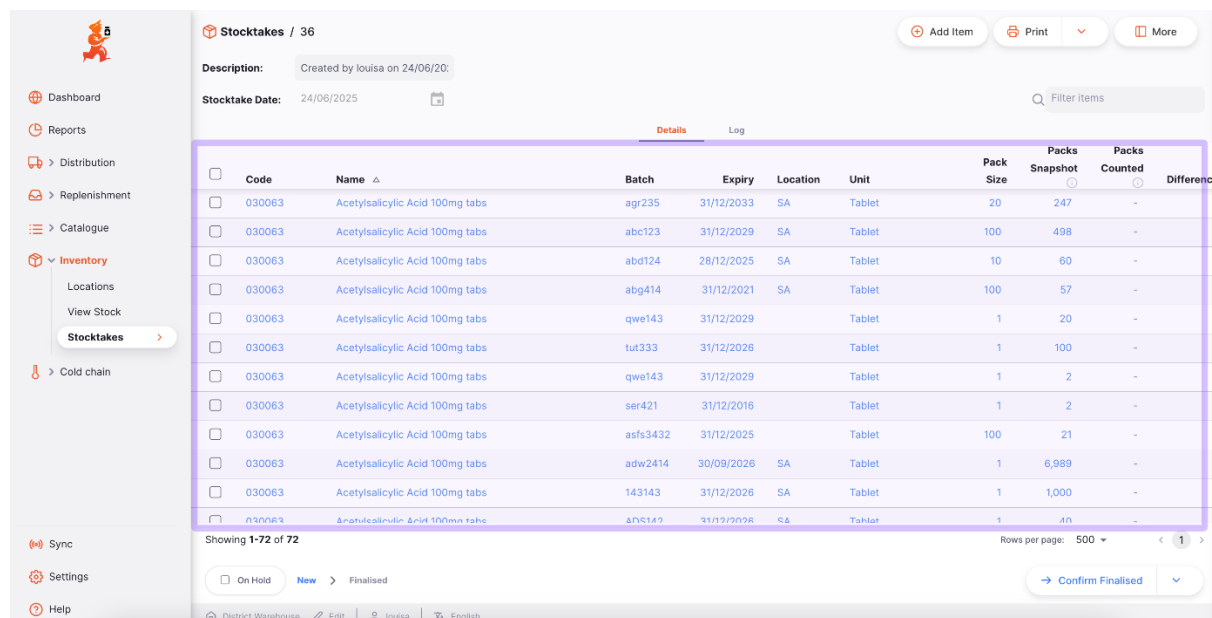
The 'New Stocktake' dialog box provides instructions and options for creating a new stocktake. It states: 'You can create a stocktake based on items currently assigned to a location, items that you currently have in stock, items assigned to a master list, or items expiring before a particular date.' Below this, it says: 'To create an empty stocktake, simply click OK to continue.' The form includes a 'Master List' dropdown, a 'Location' dropdown, a checked 'Items with Stock' checkbox, and an 'Items expiring before' date field (DD/MM/YYYY). At the bottom are 'Cancel' and 'OK' buttons.

Select OK.

Great! You have now created a **new stocktake**.

Performing the Stocktake

After creating the stocktake, a table will display all the included items and their batches. You can scroll **horizontally** to view additional details (e.g., expiry, pack size, difference) and scroll **vertically** to see more items in the list:



The screenshot shows the 'Stocktakes / 36' interface. The table lists items with the following columns: Code, Name, Batch, Expiry, Location, Unit, Pack Size, Packs Snapshot, Packs Counted, and Difference. The table is filtered to show items with Code 030063, all of which are 'Acetylsalicylic Acid 100mg tabs'. The 'Packs Counted' column shows various values, and the 'Difference' column shows '-' for all items. The interface includes a sidebar with navigation options like Dashboard, Reports, Distribution, Replenishment, Catalogue, Inventory, Locations, View Stock, Stocktakes, and Cold chain. The bottom of the table shows 'Showing 1-72 of 72' items and a 'Confirm Finalised' button.

Code	Name	Batch	Expiry	Location	Unit	Pack Size	Packs Snapshot	Packs Counted	Difference
030063	Acetylsalicylic Acid 100mg tabs	agr235	31/12/2033	SA	Tablet	20	247	-	
030063	Acetylsalicylic Acid 100mg tabs	abc123	31/12/2029	SA	Tablet	100	498	-	
030063	Acetylsalicylic Acid 100mg tabs	abd124	28/12/2025	SA	Tablet	10	60	-	
030063	Acetylsalicylic Acid 100mg tabs	abg414	31/12/2021	SA	Tablet	100	57	-	
030063	Acetylsalicylic Acid 100mg tabs	qwe143	31/12/2029		Tablet	1	20	-	
030063	Acetylsalicylic Acid 100mg tabs	tut333	31/12/2026		Tablet	1	100	-	
030063	Acetylsalicylic Acid 100mg tabs	qwe143	31/12/2029		Tablet	1	2	-	
030063	Acetylsalicylic Acid 100mg tabs	ser421	31/12/2016		Tablet	1	2	-	
030063	Acetylsalicylic Acid 100mg tabs	asfs3432	31/12/2025		Tablet	100	21	-	
030063	Acetylsalicylic Acid 100mg tabs	adw2414	30/09/2026	SA	Tablet	1	6,989	-	
030063	Acetylsalicylic Acid 100mg tabs	143143	31/12/2026	SA	Tablet	1	1,000	-	

- **Item details** – name, code, batch, expiry, unit
- **Pack size and snapshot** – what the system recorded when the stocktake was created
- **Counted** – what you physically counted
- **Difference** – auto-calculated when you enter a count
- **Reason** – optional field to explain discrepancies

You can customise the view using the “**Show/hide columns**” menu to focus on what’s most important (e.g. you may hide Unit or Pack Size to save space).

Scroll right to the end of the table where you will see an icon with 3 lines and select this. You can do this for any tables where you want columns hidden.

The screenshot shows the top of the stocktake interface. At the top right, there are buttons for 'Add Item', 'Print', and 'More'. Below these is a search bar labeled 'Filter items'. The main table has columns for 'Pack Size', 'Packs Snapshot', 'Packs Counted', and 'Difference'. A dropdown menu is open, showing a list of items to be added. The items are listed with checkboxes and their details: Code, Name, Batch, Expiry, Location, Unit, Pack Size, Packs Snapshot, Packs Counted, Difference, and Reason. A red arrow points to the 'Add Item' button.

To begin entering physical counts, select any **item line**. If you have started a blank stocktake, use the "Add Item" button to add items to your stocktake for counting.

The screenshot shows the 'Stocktakes / 31' interface. The top bar has buttons for 'Add Item', 'Print', and 'More'. Below is a search bar labeled 'Filter items'. The main table has columns for 'Code', 'Name', 'Batch', 'Expiry', 'Location', 'Unit', 'Pack Size', 'Packs Snapshot', 'Packs Counted', and 'Difference'. The first item is highlighted in blue. The sidebar on the left contains navigation options: Dashboard, Reports, Distribution, Replenishment, Catalogue, Inventory, Locations, View Stock, Stocktakes, Dispensary, and Cold chain. The bottom of the interface shows a status bar with 'Showing 1-32 of 32' and a 'Confirm Finalised' button.

As you count and enter each item in a stocktake, its line will change from blue to black, showing that the count has recorded in the system.

Counting Items

To begin entering physical counts, select any **item line**.

Edit Item

Item: PM051 BUPIVACAINE 0.5% INJECTION (HEAVY), 4 ML

Unit: AMP

Batch (Ctrl+1) Pricing (Ctrl+2) Location (Ctrl+3) Add batch (+)

Count this line	Batch	Expiry	Pack Size	Snapshot Packs	Counted # of Packs	Reason
<input checked="" type="checkbox"/>	F0355-1	31/03/2025	5	39		
<input checked="" type="checkbox"/>	F0036-1	30/11/2026	1	2,915		
<input checked="" type="checkbox"/>	F0027-1	30/11/2025	1	85		

Cancel OK OK & Next

You can then enter into the appropriate fields:

Field	What to do
Count this line	Ticking the “Count this line” box means that this batch has been physically counted during the stocktake. It doesn't remove or exclude the line from the stocktake. Leaving it unticked can help identify which batches still need to be counted.
Batch	Confirm or edit if needed
Expiry	Update if different
Counted # of Packs	Enter the number of packs you physically counted.
Reason	If the counted quantity differs from the snapshot, select a reason (e.g., “Damaged”, “Missing”) from the dropdown.
Add batch (+)	Add a missing batch by clicking Add batch (+) if you find stock that wasn’t recorded in the system.

You can also review and update the **Pricing, Location**, or make a comment on a line if needed during the stocktake process.

Edit Item

Item: 030063 Acetylsalicylic Acid 100mg tabs

Unit: Tablet

Batch (Ctrl+1) Pricing (Ctrl+2) Location (Ctrl+3) Add batch (+)

Count this line	Batch	Location	Comment
<input checked="" type="checkbox"/>	asfs3432		
<input checked="" type="checkbox"/>	ser421		
<input checked="" type="checkbox"/>	qwe143		
<input checked="" type="checkbox"/>	tut333		
<input checked="" type="checkbox"/>	qwe143		

Cancel OK OK & Next

Print Options (Optional)

Use the **Print** dropdown if you want a physical sheet for manual counting:

- **Stocktake** – General stocktake printout that includes item details to facilitate the physical stock count.
- **With Quantity** – A form that shows current recorded stock quantities, useful for verification or guided counting.
- **Without Quantity** – A blank form that hides system quantities, for performing physical counts without any bias.
- **Variance** – A report that highlights discrepancies between expected and actual stock counts after a stocktake has been completed.

Once physical counts are completed, return to the stocktake in the system to **enter the actual counted quantities**.

Tip: • Use "**Stocktake without Quantity**" if you want an unbiased count (staff won't see expected quantities). • Use "**Stocktake with Quantity**" for counters to verify expected stock. • The "**Variance**" report is most useful after entering all counts to compare snapshot vs actual and review discrepancies.

Finalise the Stocktake

Once all items are counted:

- Review the list for accuracy.
- Select **Confirm Finalised** to complete the stocktake.

Stocktakes / 31

Add Item

Print

More

Description:

Created by louisa on 05/06/2025

Stocktake Date:

05/06/2025

Filter items

Details

Log

	Code	Name	Batch	Expiry	Location	Unit	Pack Size	Packs Snapshot	Packs Counted	Difference
<input type="checkbox"/>	050457	Amoxicillin Dry Powder for Suspension 125mg/5ml Bo...	ryt464	31/01/2025		Bottle	1	2	2	
<input type="checkbox"/>	050457	Amoxicillin Dry Powder for Suspension 125mg/5ml Bo...	ryt464	31/01/2025		Bottle	1	8	8	
<input type="checkbox"/>	201116	Bandage W.O.W. 15cm wide x 5m roll	gtr253	31/12/2033		Roll	1	10	10	
<input type="checkbox"/>	047288	Benzyl penicillin Injection 1000000 Unit	sfe121	31/05/2025		Vial	1	1	1	
<input type="checkbox"/>	047288	Benzyl penicillin Injection 1000000 Unit	sfe121	31/05/2025		Vial	1	50	50	
<input type="checkbox"/>	047288	Benzyl penicillin Injection 1000000 Unit	sfe121	31/05/2025	SB	Vial	1	10	10	
<input type="checkbox"/>	047290	Benzyl penicillin Injection 500,000 Unit (300 mg)	fse214	31/12/2021	SB	Vial	1	1	-	
<input type="checkbox"/>	047290	Benzyl penicillin Injection 500,000 Unit (300 mg)	jty142	31/12/2029		Vial	1	2	-	
<input type="checkbox"/>	031661	Captopril scored 25mg tabs				Tablet	-	0	-	
<input type="checkbox"/>	clinda001	Clindamycin 500mg Injection		31/08/2026		Ampoule	1	10	-	
<input type="checkbox"/>	clinda001	Clindamycin 500mg Injection	doi124	31/12/2028	SB	Ampoule	1	4	-	

Showing 1-32 of 32

Rows per page: 500

1

On Hold

New

Finalised

Confirm Finalised

Health Clinic

Edit

louisa

English

After finalising:

- The stocktake is locked and cannot be edited.
- The inventory is now updated to reflect the new quantities.
- You can print a variance report for audit purposes or future reference.

The system will now update your stock levels, applying any gains or losses based on your counts.

Reminder: Regular stocktakes are a key part of good inventory management. They help you keep records accurate, reduce losses, and maintain accountability.

Knowledge Check

Question 1

What is the primary purpose of a full stocktake?

- To ensure all items in inventory are accounted for.
- To count only high-turnover items.
- To update item prices in the system.
- To conduct a quick check of popular products.

Question 2

Which of the following best describes a partial stocktake? Select all that apply.

- It provides a comprehensive view of the inventory.
- It is often used during busy periods.
- It focuses on specific areas or locations.
- It counts all items in the inventory.

Question 3

How often should a full stocktake be conducted?

- Only during audits.
- At regular intervals like annually or bi-annually.
- Randomly throughout the year.

d) Whenever there is a discrepancy.

Question 4

Why might an organization choose to perform a partial stocktake?

- a) To gain a complete understanding of all inventory.
- b) To minimize disruption during busy operational periods.
- c) To assess overall financial performance.
- d) To comply with legal requirements.

Question 5

What happens after finalising a stocktake?

- a) The inventory updates to reflect new quantities.
- b) The stocktake can still be edited.

Question 6

What field must be updated if the physical count differs from the initial snapshot?

- a) Counted # of Packs.
- b) Reason.
- c) Batch.
- d) Expiry.

Bulk Actions on Stocktakes

Each line in the stocktake has a **checkbox** on the left — this lets you select one or more items to make bulk actions on.

You can use these checkboxes to:

- **Delete** selected lines (e.g., if they were added by mistake)
- **Change the Location** of selected items (useful for grouping or fixing stock locations)
- **Reduce to 0** to make the counted number of packs 0 (e.g., for quickly removing expired stock)

The screenshot shows the 'Stocktakes' interface in mSupply. On the left is a sidebar with navigation options: Dashboard, Reports, Distribution, Replenishment, Catalogue, Inventory (selected), Locations, View Stock, Stocktakes (highlighted), Dispensary, and Cold chain. The main area displays a stocktake for '05/06/2025' created by 'louisa'. It features a table with columns: Code, Name, Batch, Expiry, Location, Unit, Pack Size, Packs Snapshot, Packs Counted, and Difference. The table lists 12 items, including Amoxicillin, Bandage, Benzyl penicillin, and Clindamycin. Each row has a checkbox in the first column. At the bottom, a summary bar shows '32 Selected' and three bulk action buttons: 'Delete', 'Change location', and 'Reduce to 0'. The interface also includes a search bar, a 'Filter Items' button, and a 'Rows per page' dropdown set to 500.

Tip: Use the checkboxes to quickly clean up your stocktake before entering new counts. You don't need to go line-by-line.

Scenarios

Question 1

Your store is halfway through a stocktake when a shipment of antibiotics arrives. What should you do?

- a) Set the boxes aside and enter them after the stocktake is finalised
- b) Pause the stocktake and delete it
- c) Count the new stock and include it in the stocktake without entering it
- d) Receive the shipment into the system immediately

Question 2

You're preparing for a stocktake and notice that some shipments have stock allocated but not picked. What do you need to know about this before starting your count?

- a) Picked stock will still appear in your stocktake unless the invoice is confirmed
- b) Picked stock is still on the shelf and should be counted
- c) Allocated stock is still physically on the shelf and will appear in the stocktake
- d) Allocated stock is already removed from inventory and should not be counted

Question 3

What does ticking the "Count this line" checkbox mean during a stocktake?

- a) The batch is on hold
- b) The batch has been physically counted and reviewed
- c) The batch will be deleted after finalising
- d) The batch will be excluded from the final stocktake

Question 4

During your stocktake, you find that a batch of syringes has a snapshot of 120 packs, but you only count 100. What should you do?

- a) Leave the count field blank
- b) Enter 100 in the counted field and choose a reason for the discrepancy
- c) Delete the batch from the system
- d) Adjust the snapshot to 100

Question 5

You notice a stocktake from 6 months ago with the status "NEW" that was never completed. What should you do?

- a) Ignore it — it won't affect anything
- b) Delete it before starting a new stocktake
- c) Reuse it for the next stocktake
- d) Finalise it immediately

Session 12: Locations

Now that we've covered key inventory principles, it's important to understand **how and where stock is stored** in Open mSupply. Open mSupply allows you to map and manage specific **storage locations** inside your store, from large warehouse zones to individual shelves or cold chain fridges. These locations help you stay organized, ensure compliance (especially for temperature-sensitive goods), and speed up stock retrieval during day-to-day operations or audits.

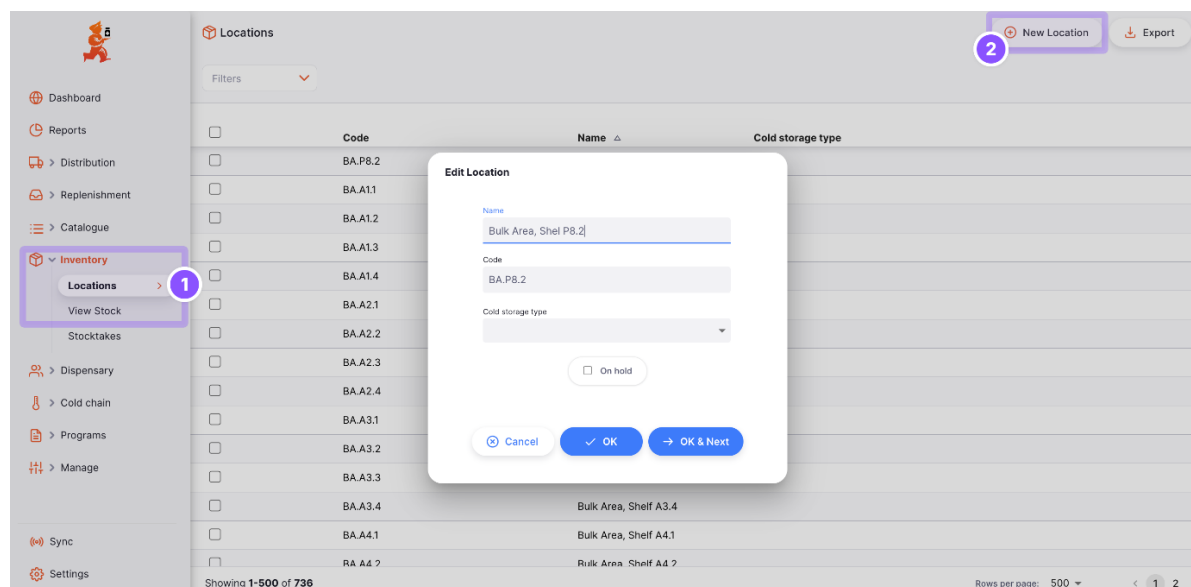
Managing Locations

In Open mSupply, **Locations** are used to define the specific places within your store where stock is kept. This could be as broad as a room (e.g. "Main Store") or as specific as a shelf or bin (e.g. "A.01.03").

When setting up your store, it's a good idea to **create standard locations** that match your real-life storage layout. Examples include:

- **Refrigerators or cold rooms** for vaccines
- **Shelves or pallets** for bulk medicine stock
- **Rooms** for segregated storage areas (e.g. emergency supply, high-value drugs)

How to Set up a Location



To create a new location, select **Inventory** → **Location** → **New Location**.

Field	Purpose
Name	A descriptive label that helps staff understand where the location is.
Code	A unique code used in the system to identify the location.
Cold Storage Type	Allows you to mark this location as a cold storage type, such as a fridge or freezer. This ensures only suitable items are stored here. Please refer to the docs for how to configure this.
On Hold	If ticked, this location is temporarily disabled and stock can't be issued from it. Useful for quarantine or when a fridge is out of service.

Once locations are created, you can assign items to those locations during receipt, stocktake, or while managing inventory. This makes it much easier to:

- Find items quickly
- Track expired or quarantined stock
- Monitor how stock is distributed across the store

Good location setup makes physical stock counts, audits, and batch tracking faster and more reliable.

"On Hold" Locations

In addition to standard storage locations, Open mSupply allows a physical location to be placed **"On Hold"**. This allows you to physically separate stock and prevent it from being issued or used from that location.

Using the "On Hold" Location

1. How to use the "On Hold" Location

- Set up a location in your store (e.g., **"ON HOLD"** or **"Quarantine Area"**)
- During stock entry, transfer, or correction, assign questionable stock to that location
- These items remain in your system, but you (and others) know not to use them

2. When to move stock into the "On Hold" Location

- It arrived damaged
- It has an unknown or incorrect expiry or batch
- It's under investigation for a quality issue
- It was incorrectly supplied or not yet verified

3. What to do after assigning stock to an "On Hold" Location

Make it clear to all users that:

- This stock should not be issued or counted as usable
- It is awaiting a decision, such as inspection, return, or disposal

Knowledge Check

Question 1

Your team has just opened a new room for storing emergency supplies. What's the best way to represent this in Open mSupply?

- Leave it unlabelled until it's used
- Add a new location with a descriptive name and code
- Create a new store for the room
- Add the item to a master list

Question 2

Which of the following location setups is most appropriate for cold chain items like vaccines?

- a) A pallet location used for bulk tablets
- b) A location marked as "On Hold"
- c) A shelf labeled "General Stock – B.03.02"
- d) A location with Cold Storage Type set to "Fridge"

Question 3

During a stocktake, a staff member can't find a batch that should be available. After some checking, they realise it's in a location marked 'On Hold'. What does this mean?

- a) The batch was already issued to a customer
- b) The stock is damaged and automatically deleted
- c) The location is inactive and stock cannot be issued from it
- d) The stock has expired and has been removed from the system

Question 4

Which of the following is a good reason to assign stock to an 'On Hold' location?

- a) It's been requested by another store
- b) It's been identified as part of a potential recall investigation
- c) It's ready for shipment
- d) It's nearly expired but still usable

Question 5

You receive a batch of antibiotics with damaged packaging and unclear expiry. What should you do when entering it into Open mSupply?

- a) Assign it to your usual stock location
- b) Refuse to enter it
- c) Store it in a fridge
- d) Assign it to the "On Hold" location for further review

Session 13: Repacks

What is Repacking?

Repacking is when you change how stock is grouped or packaged, without changing the total quantity of stock. For example, this could be doing the following: ***“I’m taking these large packs and turning them into smaller packs.”*** You might do this because:

- You need to issue stock in smaller quantities
- You want to prepare items for a health outreach or another facility
- You’re splitting bulk stock into unit-level packs for easier dispensing

For example, let's say you received:

1 bottle with 1,000 iron tablets

- Pack Quantity = 1
- Pack Size = 1,000
- Total quantity = 1 x 1000 = 1000

But in your clinic, you give **10 tablets per patient**. So you decide to repack the tablets into smaller packs:

100 small packs of 10 tablets each

- New Pack Quantity = 100
- New Pack Size = 10
- Total quantity = 100 x 10 = 1000

You still have the **same total (1000 tablets)**, but now the stock is grouped in a way that matches how you actually use it.

How to Repack


1. From **View Stock**: Select the item line you want to repack.
2. Select **Repack**.

Filling in the Repack Form

Use this form to split big packs into smaller ones — like turning one bottle of 100 tablets into smaller packs of 10 tablets.

Repack Details

Acetylsalicylic Acid 300mg tabs
Code : 030062


1  New





This stock line has not been repacked. Click New to create a new repack.

Packs Available: 30

Number of packs to repack: 2 0 → New number of packs: 0.00

Pack Size: 1 New pack size: 3 0

Location: - New Location: 

 Cancel  Save  Print 

1. Select **"New"** to start.
2. In **"Number of packs to repack"**, enter how many full packs (like bottles or boxes) you want to split.
3. In **"New pack size"**, type how many units (like tablets or syringes) should go in each smaller pack.
4. The system will show you how many new packs you'll end up with in the **"New number of packs"**.
5. *Optional:* Select a **"New Location"** where the repacked items will be stored.
6. Select **"Save"** to finish.

Repacking **does not increase or decrease** your total quantity — it just changes the grouping. This means that your total amount of stock stays the same.

Repacking Into Larger Packs

Sometimes, you receive stock in small packs — but you need larger groupings. This is common when:

- You want to combine small packs into a standard kit for an outreach or program.
- You're grouping loose or donated items into consistent bulk packs for easier supply.
- You need to prepare bulk stock for shipping with fewer handling units.

Example: Combining *"30 Packs of 1 Tablet"* into *"1 Pack of 30 Tablets"*

Knowledge Check

Question 1

You have received 2 packs of Aciclovir tablets. Each pack contains 500 tablets. In your clinic, you only dispense tablets in bottles of 100. **Convert your new stock into packs of 100 tablets.** What will your new repack entry look like?

Repack Details

ACICLOVIR 800MG TABLET
Code: PM668

This stock line has not been repacked. Click New to create a new repack.

Packs available: 2

Number of packs to repack: 0 → New number of packs: 0.00

Pack Size: 500 New pack size: 0

Location: - New Location: [dropdown]

Cancel Save Print

- a) Packs to repack: 2, New pack size: 100
- b) Packs to repack: 10, New pack size: 100
- c) Packs to repack: 5, New pack size: 100
- d) Packs to repack: 2, New pack size: 500

Question 2

You have 4 packs of 250 oral rehydration salts (ORS), and need to split them into sachets of 25 for a mobile outreach clinic. What will your new repack entry look like?

Repack Details

ORAL REHYDRATION SACHETS 4.4G
Code: PM4324

This stock line has not been repacked. Click New to create a new repack.

Packs available: 4

Number of packs to repack: 0 → New number of packs: 0.00

Pack Size: 250 New pack size: 0

Location: - New Location: [dropdown]

Cancel Save Print

- a) Packs to repack: 1, New pack size: 250
- b) Packs to repack: 25, New pack size: 4
- c) Packs to repack: 4, New pack size: 25
- d) Packs to repack: 4, New pack size: 250

Question 3

You have 5 boxes of gloves, each box contains 100 gloves. You want to repack into packs of 10 gloves for smaller facility kits. What will your new repack entry look like?

Repack Details ✕

GLOVE EXAMINATION , POWDER FREE, LATEX SMALL
Code : PMC469

New

This stock line has not been repacked. Click New to create a new repack.

Packs available: 5

Number of packs to repack: 0 → New number of packs: 0.00

Pack Size: 100 → New pack size: 0

Location: - New Location: ▾

Cancel
Save
Print
▾

- a) Packs to repack: 10, New pack size: 5
- b) Packs to repack: 5, New pack size: 10
- c) Packs to repack: 1, New pack size: 100
- d) Packs to repack: 5, New pack size: 100

Question 4

You received 1 carton of injectable contraceptives, with 50 vials inside. You want to repack them into single-vial packs. What will your new repack entry look like?

Repack Details ✕

MEDROXYPROGESTERONE ACETATE 150 MG/ML SUSPENSION INJECTION (DEPO-PROVERA)
Code : FP005

New

This stock line has not been repacked. Click New to create a new repack.

Packs available: 1

Number of packs to repack: 0 → New number of packs: 0.00

Pack Size: 50 → New pack size: 0

Location: - New Location: ▾

Cancel
Save
Print
▾

- a) Packs to repack: 50, New pack size: 1
- b) Packs to repack: 1, New pack size: 1
- c) Packs to repack: 5, New pack size: 10
- d) Packs to repack: 1, New pack size: 50

Session 14: Inventory Adjustment, Log and Ledgers

What is an Inventory Adjustment?

An **Inventory Adjustment** is a manual correction made in Open mSupply to fix the quantity of stock when it doesn't match the physical stock you have in your store. It allows you to increase or decrease the number of packs recorded in the system, without deleting or editing the original transaction. This ensures you maintain a traceable audit trail and keep stock records accurate.

Inventory Adjustment Scenarios

Let's consider scenarios for adjusting your inventory — decide what action to take (increase, decrease, increase/decrease).

1. Stock was stolen or damaged

Decrease stock

2. Stock was miscounted during stocktake

Increase or decrease stock

3. A delivery was entered with the wrong quantity

Increase or decrease stock

4. You are entering stocktake quantities written on paper

Increase or decrease stock

5. You found missing stock

Increase stock

6. Wrong item was entered under the wrong code

Decrease incorrect item and increase correct one

Pre-adjustment Checklist

- **Physically count the stock** in all possible locations (including fridges, overflow areas, and quarantine zones)
- **Check for duplicate entries**, repacks, or recent issues
- **Review logs** to confirm and check for any errors
- **Look** for pending invoices
- **Confirm adjustment** with a second person, especially for high-value items

Golden Rule: Only adjust inventory when you are **sure** that the quantity recorded in the system is wrong, and that no other stock movement explains it.

How to Perform an Inventory Adjustment

1. From **View Stock**: Select the item line you want to adjust.
2. Select **Adjust**.

Filling in the Inventory Adjustment Form

Use this form to correct your stock — for example, when items are expired, missing, found, or damaged.

1. In **"Increase or Decrease quantity"**, choose what kind of change you need to make (e.g., Increase quantity or Decrease quantity).
2. In the **"Reason"** field, select why you're making this change (e.g., Expired, Found, Damaged, or Correction).
3. In the **"by"** field, enter how many packs you are adjusting by (e.g., if 2 packs are missing, type "2").
4. **"New Pack Qty"** shows the updated total number of packs that will be in stock after the adjustment is applied.
5. Once everything is filled in, select **"OK"** to save the adjustment.

Example Scenario

You find 200 tablets of ibuprofen have expired and want to discard this. What will you input into the **Inventory Adjustment Form**?

1. Select **Decrease Quantity**.
2. Select Reason: **"Expired"**.
3. In the **"by"** field, enter: **200**.
4. Select **"OK"** to save.

View Stock / IBUPROFEN 200 MG TABLET

Details Log Ledger

Adjustment Details

Pack: 1

1 Decrease quantity

2 Reason: Expired

Pack Qty: 2,000

Available (packs): 2,000

by: 200

New Pack Qty: 1,800

Cancel

4 OK

Adjustment Reasons

When you make an inventory adjustment, Open mSupply requires you to select a **reason** for the change. This ensures there’s a clear, traceable explanation for every manual correction — which is important for audits, accountability, and understanding stock history.

Note: Inventory Adjustment Reasons are currently managed on Legacy mSupply. If you are unsure which reason to use, or if a reason you need is missing, please contact your local mSupply team or mSupply Support for guidance.

Common Reasons for Increasing Stock

Reason	When to use it
Found during stocktake	Physical stock was found that wasn’t recorded in the system
Recovered stock	Stock was missing and has now been recovered
Entry correction (undercounted)	An earlier transaction didn’t record the full quantity
Returned from facility	Stock was returned from an external source but has not been recorded yet

Common Reasons for Decreasing Stock

Reason	When to use it
Expired	Stock has passed its expiry date and must be removed
Damaged	Stock is broken, contaminated, or unusable
Lost/Missing	Stock cannot be found after a thorough check
Entry correction (overcounted)	Too much stock was recorded by mistake
Stolen	Stock was confirmed stolen or tampered with

Understanding the Log and Ledger Tabs

- Dashboard
- Reports
- Distribution
- Replenishment
- Catalogue
- Inventory
 - Locations
 - View Stock
 - Stocktakes

View Stock / PARACETAMOL 125 MG SUPPOSITORY

Repack

Adjust

Details

Log

Ledger

Date	Time	Name	Unit Qty	Type	Reason
30/10/2024	13:00	Inventory Adjustment	-3,600	Inventory Reduction #7104	
13/09/2024	01:50	Repack	-3,600	Repack #11684	

Inventory → View Stock → Select stock line of an item → View Log or Ledger

When you select a stock line in Open mSupply, you'll see two tabs: **Log** and **Ledger**. These help you understand the *history* and *status* of that item.

The **Log** shows a **chronological list** of all actions performed on this stock line. It records who did what, when, and what changed.

The **Ledger** shows the **running total** of stock over time for that particular stock line, like a bank account balance. Each row represents a transaction (e.g., +1 unit quantity received, -1 issued). It reflects the **unit quantity** after each change.

Feature	Log	Ledger
What it shows	Events and actions	Stock balance over time
Includes	User, timestamp, type	Quantity in/out, new balance
Best for	Auditing activity	Checking stock flow and discrepancies

Tracking Adjustments

All stock movements — including adjustments, repacks, and shipments — are automatically recorded in the **Ledger** **tab**. This provides a full history of what happened to each item, including:

- **Date and time** of the transaction
- **Where the change went to** (e.g., facility name)
- **Quantity** added or removed (shown in the *Unit Qty* column)
- **Type** of action (e.g., Outbound Shipment, Repack)
- **Reason**, if one was entered

Check the ledger for a stockline: **Catalogue → Items → Select the item line → Ledger**

Selecting a line in the ledger will take you to the **exact transaction or record** where that stock movement occurred.

Note: On the ledger, all Inventory Adjustments will appear with the Type: **Inventory Adjustment**. This includes adjustments made manually and those made during a **Stocktake**. Use the "**Reason**" column to understand why the adjustment was made.

Why the Ledger Matters

The ledger helps supervisors and auditors trace stock changes. If there's a problem or mismatch, you can come here to understand what happened.

Using **clear reasons** (like "Expired", "Found", "Damaged", or "Correction") ensures everyone can follow the story — even months later.

Tips for Accurate Inventory Adjustments

- Always double-check the **physical stock** first
- Always **include a reason** — this becomes part of the audit trail
- Don't use adjustments for normal receipts or issues — use the correct workflows (supplier invoice, distribution, etc.)

If you're **decreasing** stock, confirm whether the item is **expired, damaged, or lost** and record that correctly.

Knowledge Check

Match each scenario to the correct action.

1. A box of antibiotics got wet and had to be discarded.
 - a) **Increase** stock by 1 pack — Reason: "Found"
 - b) **Increase** stock by 1 pack — Reason: "Correction"
 - c) **Decrease** stock by 2 packs — Reason: "Expired"
 - d) **Decrease** stock by duplicate amount — Reason: "Duplicate entry"
 - e) **Decrease** stock by 1 pack — Reason: "Damaged"
2. You find 2 expired vials of adrenaline in the fridge.
 - a) **Decrease** stock by 2 packs — Reason: "Expired"
 - b) **Increase** stock by 1 pack — Reason: "Correction"

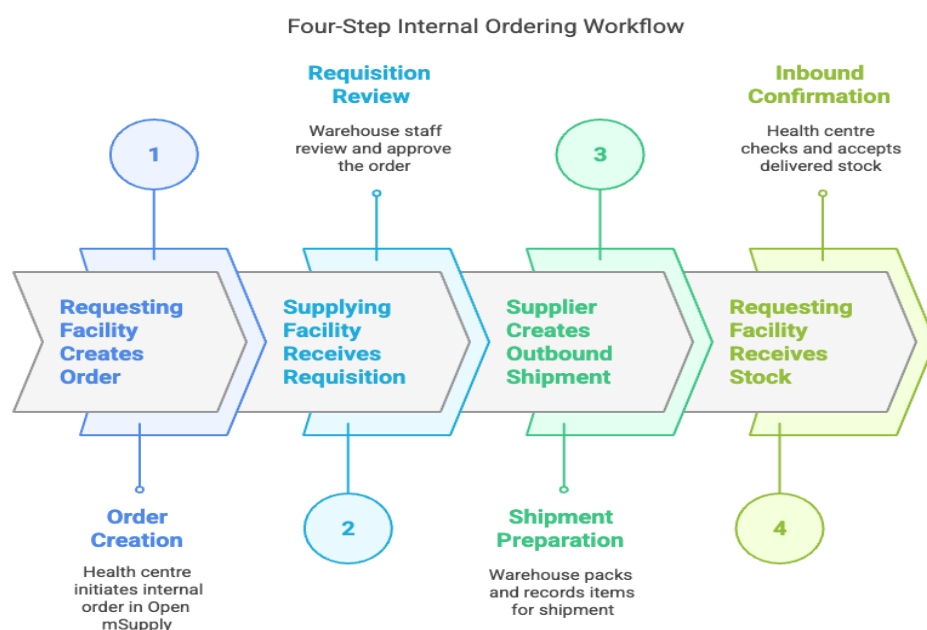
- c) **Increase** stock by 1 pack — Reason: “Found”
 - d) **Decrease** stock by duplicate amount — Reason: “Duplicate entry”
 - e) **Decrease** stock by 1 pack — Reason: “Damaged”
3. An extra box of gloves (100 units) is found during stocktake.
- a) **Decrease** stock by 2 packs — Reason: “Expired”
 - b) **Increase** stock by 1 pack — Reason: “Correction”
 - c) **Increase** stock by 1 pack — Reason: “Found”
 - d) **Decrease** stock by duplicate amount — Reason: “Duplicate entry”
 - e) **Decrease** stock by 1 pack — Reason: “Damaged”
4. You received 5 bottles of antibiotics, but only entered 4 by mistake.
- a) **Decrease** stock by 2 packs — Reason: “Expired”
 - b) **Increase** stock by 1 pack — Reason: “Correction”
 - c) **Decrease** stock by duplicate amount — Reason: “Duplicate entry”
 - d) **Increase** stock by 1 pack — Reason: “Found”
 - e) **Decrease** stock by 1 pack — Reason: “Damaged”
5. You accidentally entered the same delivery twice.
- a) **Decrease** stock by 2 packs — Reason: “Expired”
 - b) **Increase** stock by 1 pack — Reason: “Correction”
 - c) **Decrease** stock by duplicate amount — Reason: “Duplicate entry”
 - d) **Increase** stock by 1 pack — Reason: “Found”
 - e) **Decrease** stock by 1 pack — Reason: “Damaged”

Session 15: The Order Cycle

Ordering Between Facilities in Open mSupply

If you work in a health facility that receives stock from a warehouse (or sends stock to other facilities), it is important to understand how the ordering process works in Open mSupply.

Instead of using paper forms or phone calls, everything is tracked in the system — from the moment the request is made to when the stock is delivered and received. This makes your job easier and ensures that nothing is missed.



The Four-Step Internal Ordering Workflow

When one facility needs stock from another facility that is also using mSupply, the process goes through **four simple steps**. Here's how it works from start to finish.

Step 1: The Requesting Facility Creates an Internal Order

The health centre, clinic, or ward that needs stock would go to Open mSupply and create a new **Internal Order**. They then select the supplier (e.g., central warehouse) and choose the items and quantities required. This request is saved and sent through the system.

Step 2: The Supplying Facility Receives the Requisition

At the warehouse, staff see that a new order (i.e., the **requisition**) has arrived. They review the request and decide whether to approve it. They might:

- Approve the requested quantities
- Change some quantities (e.g., if there's not enough stock)
- Ask questions if something looks wrong

Once approved, they prepare to send the items.

Step 3: The Supplier Creates an Outbound Shipment

The warehouse staff then pack the items and record what they are sending by creating an **Outbound Shipment** in Open mSupply.

This shipment includes:

- Item names
- Batch numbers
- Quantities
- Expiry dates

This shipment is sent to the requesting facility.

Step 4: The Requesting Facility Receives the Stock

When the shipment arrives, the requesting facility checks the delivery. They would:

- Compare what they received with what was sent
- Confirm quantities and expiry dates
- Accept the stock into their system as an **Inbound Shipment**

Once this is done, the process is complete — the **Internal Order** has been fully supplied.

Summary of the Full Workflow

<i>Step</i>	<i>Who does it</i>	<i>What happens</i>
1. Create Internal Order	Requesting facility	Request is created and sent to the supplier
2. Receive Requisition	Supplying facility	Request is reviewed and approved
3. Outbound Shipment	Supplying facility	Stock is picked, packed, and sent
4. Inbound Shipment	Requesting facility	Stock is received and confirmed in the system

Why This Process Matters

- You can track every order, from request to delivery
- It reduces mistakes and missed items
- Both sides (sender and receiver) can see what's happening
- It makes reporting and supervision much easier

Dealing with External Customers and Suppliers

Sometimes, you may need to create an internal order or issue stock to a customer or supplier who is **not using mSupply**. This is common when working with smaller clinics, partner organisations, or programs that operate outside your system. In these cases, the process is **entirely manual**, meaning no automatic shipments or receipts will be triggered.

What to Know

❖ **Internal Orders Still Work**

You can create an internal order as normal to document what's being requested.

❖ **Manual Outbound Shipment**

If you're supplying stock, you will need to manually create an outbound shipment to deduct the items from your inventory.

❖ **Manual Inbound Shipment**

If they send stock to you, you'll need to manually create an inbound shipment to receive it.

❖ **No Sync or Visibility**

The receiving party won't be notified or updated automatically — all communication and confirmation must be handled outside the system (e.g., by phone, email, or paper forms).

Name	Status	Invoice Number	Created	Delivered
Health Clinic	Picked	21	29/06/2025	
Global Donor	New	20	24/06/2025	
Health Clinic	Verified	19	23/06/2025	24/06/2025
District Dispensary	Delivered	18	17/06/2025	23/06/2025
Global Donor	New	17	10/06/2025	
Global Donor	Delivered	16	24/03/2025	24/03/2025
Global Donor	Delivered	15	24/03/2025	28/05/2025
Health Clinic	Verified	14	06/01/2025	06/01/2025
Health Clinic	Delivered	13	06/01/2025	06/01/2025
Health Clinic	Verified	12	05/01/2025	05/01/2025
Health Clinic	Verified	11	05/01/2025	05/01/2025
Global Supplier	Verified	10	19/12/2024	19/12/2024

You can go to any workflow and create a new order, requisition or shipment. This will generate a blank form for you to fill details in manually.

Using this approach still allows you to keep clean stock records and audit trails, even when working with external parties.

Knowledge Check

Question 1

What is the first step in the internal ordering workflow in Open mSupply?

- a) Inbound Shipment
- b) Outbound Shipment
- c) Create Internal Order
- d) Receive Requisition

Question 2

Which facility's role is to review and approve the requisition?

- a) Supplying facility
- b) Requesting facility

Question 3

In the outbound shipment step, what action is taken by the supplying facility?

- a) Create an internal order
- b) Review the requisition
- c) Pick, pack, and send the stock
- d) Receive the stock

Question 4

Why is it beneficial to track orders in Open mSupply?

- a) It eliminates the need for electronic systems.
- b) It allows for tracking from request to delivery.
- c) It increases paperwork requirements.
- d) It reduces mistakes and missed items.

Session 16: Internal Orders

An **Internal Order** is a request for stock made from **one store to another**. It's commonly used when a lower-level facility, ward, or health centre needs to restock from a higher-level store, such as a warehouse, central medical store, or hospital pharmacy.

Instead of using paper forms, phone calls, or emails, internal orders in Open mSupply allow requests to be made, reviewed, approved, picked, and dispatched entirely within the system — making the process faster, clearer, and more accountable.

When Do You Use It?

Internal orders are helpful for creating a stock request to a supplying facility, especially when that facility also uses mSupply — as it allows for quicker review and processing.

Common examples of using *Internal Order* includes:

- ❖ A **health facility** requesting routine resupply from a **central warehouse**
- ❖ A **hospital ward** requesting gloves, medicines, or IV fluids from the **hospital main store**
- ❖ A **clinic or mobile unit** requesting stock in response to an **outbreak or emergency**
- ❖ A **dispensary** requesting more medicines or vaccines from a **district store**

<i>Role</i>	<i>What they do</i>
Requesting facility (customer)	Creates the internal order in Open mSupply
Supplying facility (warehouse or store)	Reviews the order (requisition), prepares the shipment (outbound shipment), and sends the stock

Benefits of Using Internal Orders

<i>Benefit</i>	<i>What it means</i>
Organised and traceable	All requests are saved in the system and easy to find later
Linked to shipments	Automatically creates outbound and inbound shipments between stores
Trackable	You can view the order status at any time
No double entry	The supplying store doesn't need to retype the order — it's generated automatically
Better communication	Removes the need for emails, calls, or paper forms
Easier to manage	Streamlines ordering across facilities and reduces manual work

What Happens When You Send an Internal Order?

- ❖ The supplying facility receives it and reviews it (**Requisition**).
- ❖ They then create an **Outbound Shipment**.
- ❖ You'll later receive it as an **Inbound Shipment**.
- ❖ The full cycle is recorded and visible in the system.

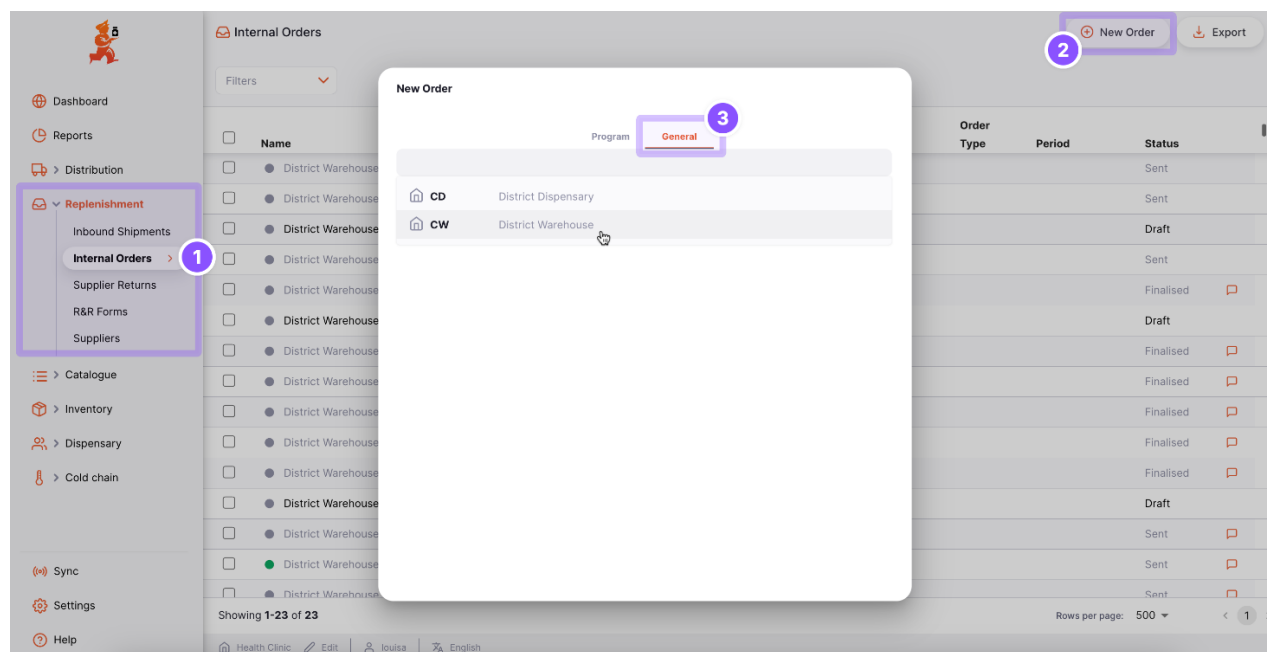
This is the 4-step workflow you learned in the previous section.

Before Creating an Internal Order

Make sure:

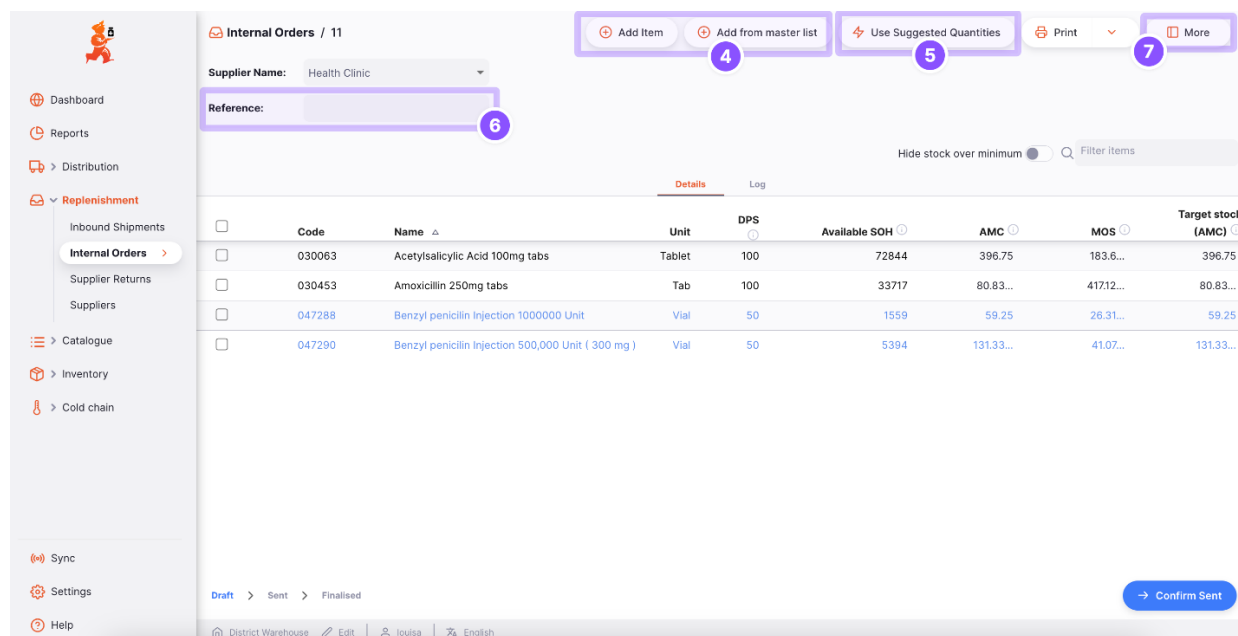
- ❖ You're logged in to the **correct store** (your facility)
- ❖ You've selected the right **supplying store**
- ❖ You've **synced** recently (before and after if offline)
- ❖ You've **checked the current stock** to avoid over-ordering

Creating an Internal Order



1. Go to **Replenishment --> Internal Orders**. This opens a list of past orders. From here, you can view previous requests or start a new one.
2. Select **"New Order"** to begin a new request.
3. Select the **Supplier Facility**. This is the facility you want to request stock from. This is usually a warehouse or district store.

Adding Items to Orders



4. You can add items in two ways:
 - **Manually:** Click **Add Item** to search and select items from your item list.

- **From Master List:** Click **Add from Master List** to quickly add items that are on a master list.
- Review and Use Suggested Quantities
 - If your facility tracks consumption (AMC), the system can automatically suggest how much to order.
 - Select **"Use Suggested Quantities"** to auto-fill the request column. This will fill in the suggested quantity for **ALL** items with no quantity entered.
 - References:** You can also add a reference code or comment in the **Reference** field. These notes are for internal use only.
 - The **"More"** button opens a side panel with extra abilities for managing your internal order.
 - **Order Info:** Shows your reorder threshold and target Months of Stock (MOS). These settings guide how much stock the system recommends.
 - **Additional Info:** Shows who created the order, creation date, and lets you add a colour tag or comment to help identify or track the order later.
 - **Actions:** Use the **"Delete"** button to delete the order if it's no longer needed.

The screenshot displays the 'Internal Orders' management interface. On the left is a sidebar with navigation options like Dashboard, Reports, Distribution, Replenishment, and Catalogue. The main area shows a table of items with columns: Code, Name, Unit, DPS, Available SOH, and AMC. A right-hand side panel is open, containing sections for 'Order info' (with dropdowns for Reorder threshold and Target MOS), 'Additional info' (showing user 'louisa' and date '26/04/2025'), 'Related documents', and 'Actions' (with a 'Delete' button).

Select the **More** button to open the right-hand side panel shown.

Understanding Reorder Thresholds

In the **"Order Info"**, you can set re-ordering thresholds.

These settings help Open mSupply suggest the right quantity to order for you, based on your **consumption** and **Months of Stock (MOS)**.

+

Add from master list

⚡

Use Suggested Quantities

🖨

Print

▼

Hide stock over minimum

🔍

Filter items

Details

Log

	Unit	DPS	Available SOH	AMC
	Tablet	30	39	8
	Tab	100	20	19.25
	Ampoule	10	14	2.17...
	Tablet	100	580	185
	Each	20	100	0

Order info

Reorder threshold MOS

1 Month

Target MOS

6 Months

Additional info

Entered by

Created

Colour

Comment

louisa

26/06/2025

Reorder threshold MOS

This is the **minimum Months of Stock** your store should hold before the system suggests placing a new order.

- Think of this as your **alert point** — when stock drops below this level, the item is flagged for replenishment.
- *Example:* If the **Reorder Threshold** is set to **1 month**, and your average monthly usage is **100 tablets**, Open mSupply will suggest placing an order once your stock drops below **100 tablets**.

Target MOS

This is your **ideal stock level** (i.e., your months of stock coverage) that you want to have after the order arrives.

- This ensures your order is big enough to bring stock levels **back up to your target**.
- *Example:* If your **Target MOS** is **3 months**, and you use **100 tablets per month**, the system will suggest ordering enough to reach **300 tablets** in total.

How Does It Work?

Let's say you currently have **80 tablets**, your reorder threshold is **1 month**, the target MOS is **3 months**, and your AMC is **100 tablets** per month:

- Since 80 is below the 1-month threshold (you use 100 per month), the system triggers a reorder
- It will calculate how many tablets are needed to reach the 3-month target (you will need 300 to cover 3 months)
- **Suggested quantity** = 300 (target) – 80 (current stock) = **220 tablets**

Understanding the Internal Orders Page

Once your items have been added, this will appear in your internal order page. Scroll horizontally to see more information and vertically to see your full item list:

- Dashboard
- Reports
- Distribution
- Replenishment
 - Inbound Shipments
 - Internal Orders
 - Supplier Returns
 - Suppliers
- Catalogue
- Inventory
- Cold chain
- Sync
- Settings
- Help

Internal Orders / 11

Add Item
Add from master list
Use Suggested Quantities
Print
More

Supplier Name: Health Clinic
Reference:

Hide stock over minimum
Filter items

Details

Log

	Code	Name	Unit	DPS	Available SOH	AMC	MOS
	030063	Acetylsalicylic Acid 100mg tabs	Tablet	100	72844	396.75	183.6...
	030453	Amoxicillin 250mg tabs	Tab	100	33717	80.83...	41712...
	047288	Benzyl penicilin Injection 1000000 Unit	Vial	50	1559	59.25	26.31...
	047290	Benzyl penicilin Injection 500,000 Unit (300 mg)	Vial	50	5394	131.33...	41.07...

Draft
Sent
Finalised

Confirm Sent

District Warehouse
Edit
louisa
English

(1) Shows the column names and (2) shows the placeholder lines (in blue). This is explained below.

What Do These Columns Mean?

Column	Description
Stock on hand	What you currently have
AMC	Your average monthly consumption based on a set lookup period on mSupply (e.g., 12 months)
Target stock	The amount of stock you want to maintain depending on the Target Months of Stock that has been set
Suggested quantity	How much the system recommends you to order
Requested	How much you have requested. You can accept the suggestion or change the number based on your needs if you have used the “ Use Suggested Quantities ” button.

Why Are Some Item Lines Blue?

Whenever you see blue item lines, it means you are looking at a **placeholder line**. Entering a quantity into these lines will turn the line black and indicate that you have put a request in for that item.

What Are Placeholder Lines?

Placeholder lines are **temporary, editable entries** that let you start preparing an order throughout the workflow. They are helpful for:

- Recording what you plan to request
- Adding items from a master list or suggested quantities
- Saving partial requests if full stock isn’t available

They will only be confirmed if you enter a quantity. If left untouched, they won’t be included when the order is sent.

Viewing Items for Order

Once items have been added, you will see the following fields:

Field	Description
Stock on hand	What you currently have
AMC	Your average monthly consumption

Target stock	The amount of stock you want to maintain depending on the Target MOS (Months of Stock) that has been set
Suggested quantity	How much the system recommends you order
Requested	How much you have requested. You can accept the suggestion or change the number based on your needs if you have used the “Use Suggested Quantities” button.

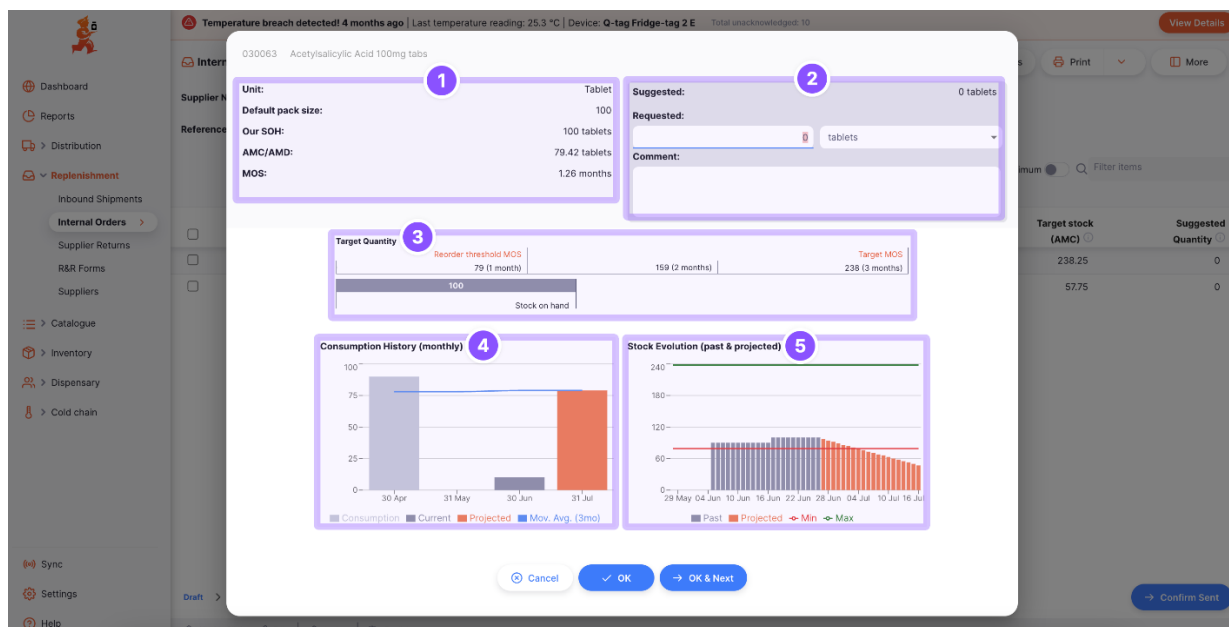
Item Details Ordering Page

When you select an item in an Internal Order, Open mSupply provides visual graphs to help you:

- Understand how much stock you've used
- See how much you're projected to use
- Check if your current stock levels are too low (or too high)

These tools are especially helpful for avoiding stockouts or overstocking — without you needing to manually record and calculate how much stock is being used or needs to be ordered.

What This Looks Like



1. Item & Stock Details

This section gives you key information about the item, including current stock, usage rates, and how long your stock will last.

030063 Acetylsalicylic Acid 100mg tabs

Unit:	Tablet
Default pack size:	100
Our SOH:	100 tablets
AMC/AMD:	79.42 tablets
MOS:	1.26 months

- **Unit** – The individual form in which the item is used (e.g., Tablet, Vial).
- **Default Pack Size** – Number of units per pack (e.g., 100 tablets in 1 pack).
- **Our SOH (Stock on Hand)** – How many individual units (e.g., tablets) are currently in your store.
- **AMC/AMD** – Average Monthly Consumption or Average Monthly Demand. Calculated from historical transactions.
- **MOS (Months of Stock)** – How many months your current stock will last at current usage rates.

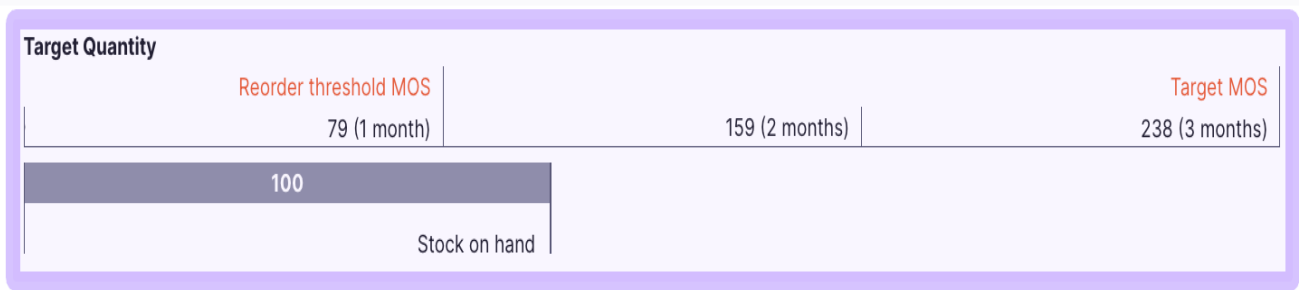
2. Ordering Panel

Suggested:	0 tablets
Requested:	
<input type="text" value="0"/>	tablets
Comment:	

Where you review the system's suggested quantity and enter your own request, with an optional comment.

- **Suggested** – The system's recommendation, based on current stock and usage. May show 0 if you still have enough.
- **Requested** – Where you enter how many tablets or packs you want to order. Next to this, choose the unit type: packs or individual units.
- **Comment** – Optional field to explain your decision (e.g., upcoming campaign, expected stock delays).

3. Target Quantity Bar

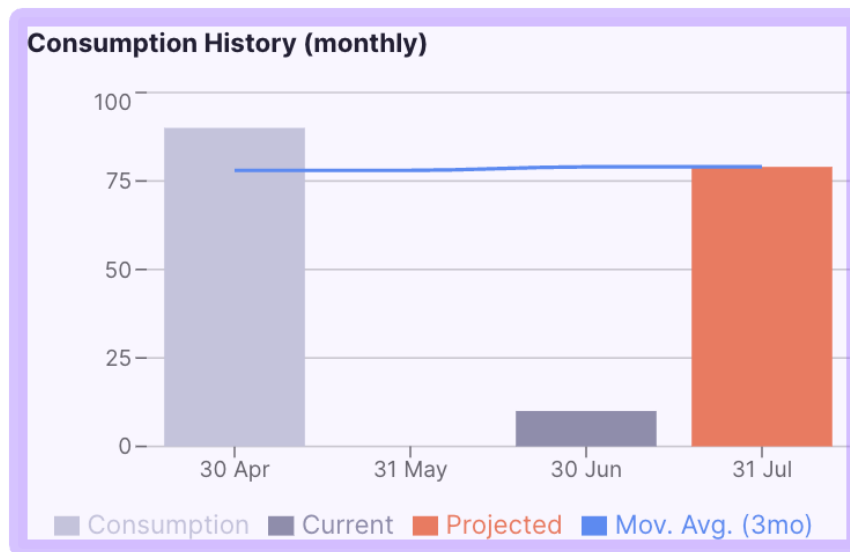


A visual summary showing how your current stock compares to the reorder threshold and target stock level.

- **Reorder Threshold MOS (79 tablets [1 month])** – If your *Stock on Hand* line drops below the reorder threshold line (the line that will cover 1 month of stock), you risk running out soon.
- **Our Stock on Hand (100 tablets)** – The amount you currently have in stock.
- **Target Quantity Bar 159 tablets (2 months)** – A midpoint to help visualise where you stand.
- **Target MOS (238 tablets [3 months])** – Your ideal stock level.

Your **Reorder Threshold MOS** and **Target MOS** are based on your chosen thresholds that you set in the **More --> Order Info** area (described above).

4. Consumption History Chart



A chart showing past monthly usage to help identify trends and understand average demand.

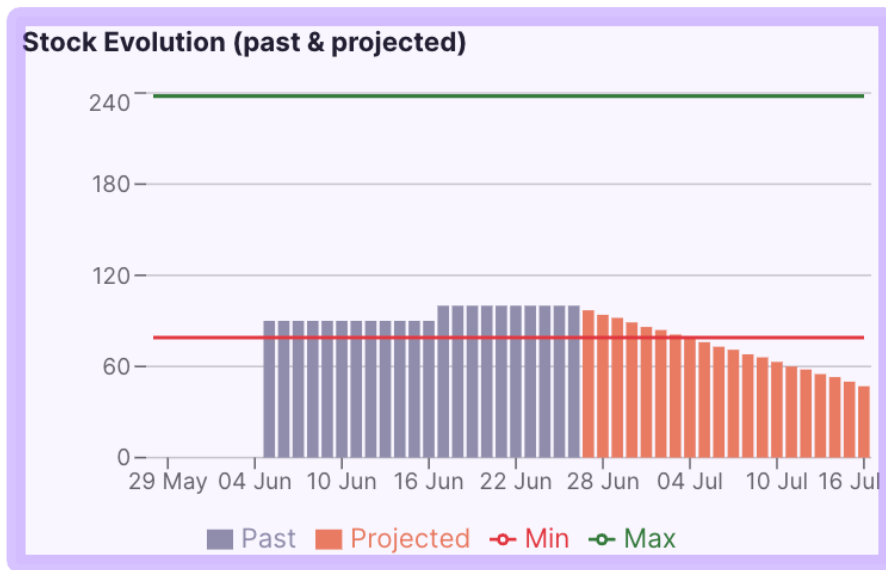
- **Grey bars** – Actual usage for each past month (light gray) and current month (in dark gray).
- **Blue line** – Your average monthly consumption (AMC).
- **Orange bar** – Estimated future usage based on past consumption.

How to Use It

- Check if your recent usage is increasing, decreasing, or stable
- Use this information to guide how much to request in your internal order
- If projected consumption is higher than average, consider requesting more
- If your average is dropping, avoid over-ordering

Tip: Look for patterns in your graph... is demand steady, increasing, or irregular?

5. Stock Evolution Chart



A projection of future stock levels over time, helping you see when you'll fall below reorder levels if no order is placed.

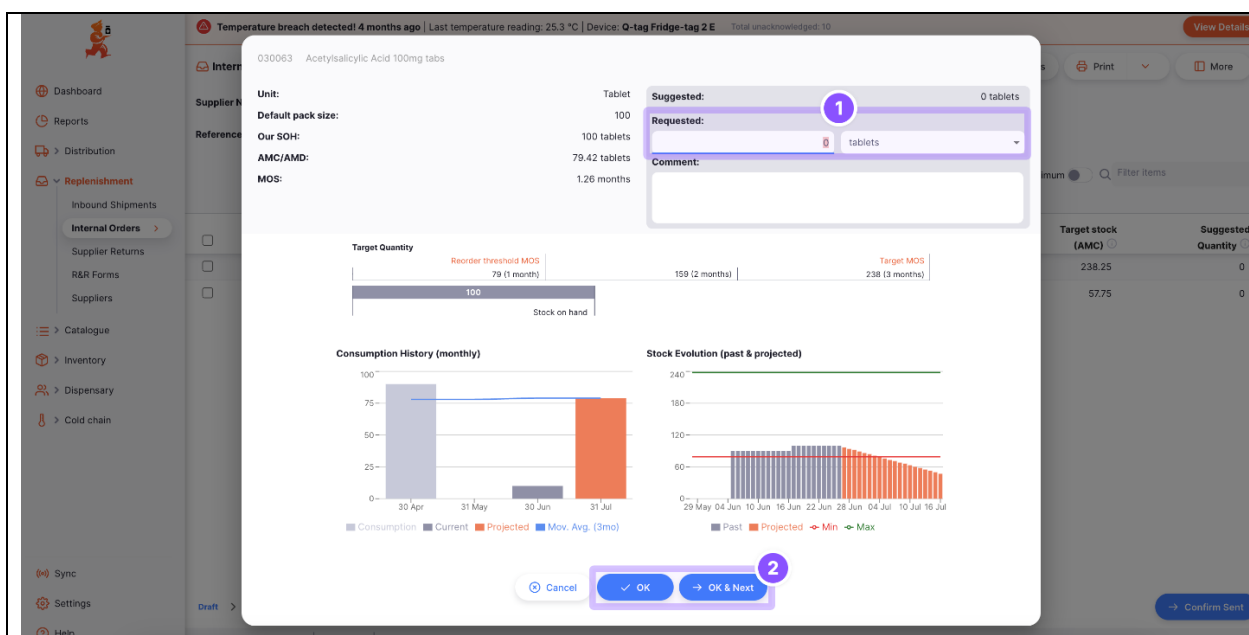
- **Grey bars (left)** – Past stock levels.
- **Orange bars (right)** – Estimated future stock levels if no new stock is received.
- **Red line** – Min level (warning zone). The minimum recommended amount you should keep on hand.
- **Green line** – Max level (safety zone). The maximum you should keep to avoid overstocking

Tip: If the orange bars dip below the red line in the coming weeks, it's a sign you'll run out soon unless you place an order.

How to Use It

- If the projected bars fall below the red line, you risk a **stockout** — consider ordering more
- If you are already below the red line, your order is urgent
- If projected levels are far above the green line, reduce your request to avoid overstocking

Using The Ordering Page



Enter the quantity you want to request, choose whether it's in packs or units, and click OK.

1. Check your current stock and usage

- Look at **Our SOH** to see how much you have.
- Review **AMC/AMD** and **MOS** to understand how fast the item is being used and how long your stock will last.

2. Use the graphs to guide your decision

Target Quantity Bar:

- Is your current stock below the red line (reorder point)?
- Are you close to the green line (ideal 3-month stock)?

Consumption History:

- Has usage increased recently?
- Is your average consumption stable or rising?

Stock Evolution:

- Will you run out in the coming weeks if you don't reorder?

Putting It Together When Ordering

When reviewing an item:

- Look at the **consumption graph** to understand how usage is changing
- Check the **stock evolution graph** to see if you're at risk of going below the minimum level
- Adjust your **Requested Quantity** in the internal order accordingly

3. Review the suggested quantity

- If the system shows a **suggested amount**, it's based on current usage and stock.
- If it says **0**, it means you're above the reorder threshold — but you can still request more if needed.

4. Enter your request

- In the **Requested** field, type how much you want (in tablets or packs).
- After entering your quantity, press **OK** or **OK & Next** to move to the next item or finish your order.

Tip: Even if you don't fully understand the numbers, use the patterns:

- Are the bars going down? You're running out.

- Are they flat and steady? You're probably okay.
 - Are they higher than the max line? You may be overstocked.
- When in doubt, ask a supervisor — the graphs are there to guide you.

Send the Order

Once all items and quantities are confirmed:

1. Click **Send** to submit the order to the supplier facility.
2. The order will now appear in their system, ready for review and processing.

Once sent, the order becomes read-only, and you cannot edit it any further.

Status Bar

At the bottom of the screen are key statuses for your order. These show you exactly where your order is in the process — from drafting to final confirmation:

Internal Orders / 43

Supplier Name: District Warehouse

Reference:

Hide stock over minimum ☐ Filter items

	Code	Name	Unit	DPS	Available SOH	AMC	MOS	Target stock (AMC)
<input type="checkbox"/>	030063	Acetylsalicylic Acid 100mg tabs	Tablet	100	100	79.42...	1.26...	476.5
<input type="checkbox"/>	030453	Amoxicillin 250mg tabs	Tab	100	20	19.25	1.04...	115.5
<input type="checkbox"/>	clinda001	Clindamycin 500mg Injection	Ampoule	10	14	2.17...	6.46...	13

Status history

- Draft 26/06/2025
- Sent
- Finalised

[Draft](#) [Sent](#) [Finalised](#)

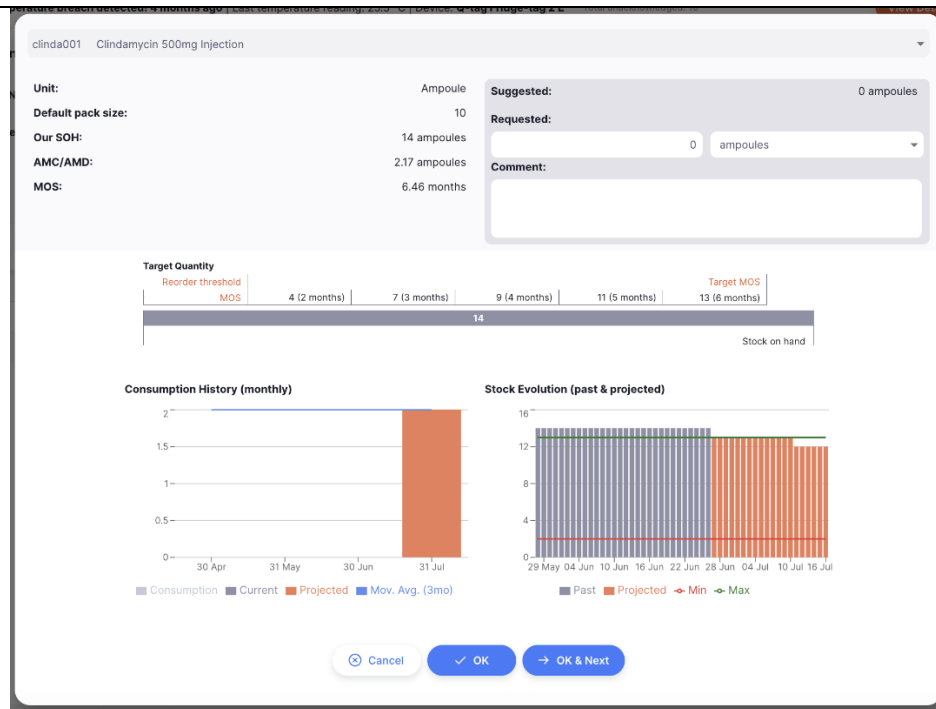
[Confirm Sent](#)

Hover over the status bar to see where your progress is in the order.

You will notice statuses in different parts of the system, especially in workflows involving orders and shipments. They help everyone stay on the same page, ensure accountability, and make it easy to track what's been done and what comes next.

Scenario Activity

You are a pharmacist at a health facility preparing your monthly internal order. You open the item screen for *Clindamycin 500mg Injection* in Open mSupply. Answer the following questions based on the diagram below:



Question 1

Based on the stock on hand and target MOS, what should you do?

- a) Delete the item from the order
- b) Place a small top-up order
- c) Order more ampoules to be safe
- d) Do not order — you have enough stock

Question 2

Why does the system suggest 0 ampoules?

- a) Stock is already above the reorder target
- b) The AMC is too low
- c) There is an error in the data
- d) The item is no longer in use

Question 3

What do the orange bars in the Stock Evolution chart show?

- a) Stock already issued
- b) Projected stock levels over time if no order is placed
- c) Stock that has expired
- d) Incoming supply from the warehouse

Question 4

What does the green line in the Stock Evolution chart mean?

- a) The ideal target stock level
- b) The point where the stock will expire
- c) The reorder threshold
- d) The minimum monthly usage

Knowledge Check

Question 1

When should a health facility create an Internal Order?

- a) When they need to restock supplies.
- b) When they are adjusting staff schedules.
- c) When they are changing their service hours.
- d) When they conduct patient surveys.

Question 2

After creating an Internal Order, what is the first step in the process?

- a) The supplying facility receives and reviews the order.
- b) The order is automatically shipped.
- c) The request is sent to the main hospital.
- d) The items are delivered immediately.

Question 3

Why is it important to check current stock before placing an Internal Order?

- a) To avoid over-ordering.
- b) To ensure all staff are informed.
- c) To meet budget requirements.
- d) To prepare for audits.

Question 4

What does the 'Suggested Quantity' field indicate on an Internal Order?

- a) The amount recommended to order based on consumption.
- b) The total stock available.
- c) The quantity previously ordered.
- d) The maximum capacity of the store.

Question 5

What is the significance of the 'Target Stock' value?

- a) It indicates the desired amount of stock to maintain.
- b) It shows the current stock levels.
- c) It reflects the average monthly consumption.
- d) It is the maximum allowable stock limit.

Session 17: Requisitions

What Is a Requisition?

A **Requisition** is what the supplier facility sees after a customer sends an **Internal Order**. Requisitions allow the supplier to decide how much can be supplied, based on available stock or other constraints.

1. The **Customer** creates and sends an internal order.
2. The **Supplier** receives that as a **Requisition**.
3. The requisition shows what the customer has asked for and gives the supplier a chance to review, adjust, and supply stock.

Example: Imagine you work at a hospital warehouse, and a clinic sends you a stock request. The moment they hit “**Send**” in Open mSupply, their internal order becomes your **requisition**. It shows up on your screen and says: *“Here’s what this facility is asking for. Can you send it?”*

You now have to:

1. **Review** what they want.
2. **Check** your stock.
3. **Decide** how much to send.

Requisition Scenarios

1. Monthly Resupply

- A rural health centre creates a monthly internal order.
- They request 2000 paracetamol tablets and 3 bottles of amoxicillin to the warehouse.
- The warehouse receives the **requisition** and sees the request.
- The warehouse has only 1000 paracetamol tablets in stock — so they enter 1000 in the “**Supply**” column.

2. Emergency Request

- A facility runs out of IV fluids after a sudden outbreak.
- They submit an urgent internal order.
- It appears in your requisition list with high-priority items.
- You respond quickly by supplying what you can, even if it’s not the full amount.

3. Programme-Linked Supply

- A malaria control programme allows only a maximum of 50 rapid diagnostic tests per clinic per month.
- Even if a clinic requests 80 in their internal order, the supplier enters 50 as the supply quantity in the requisition, based on programme rules.

4. Out-of-Stock Handling

- A facility requests zinc tablets.
- The warehouse is completely out of stock.
- The warehouse enters 0 in the supply column, and the item will appear as unfulfilled.
- The requisition stays as a record of the request.

Why Requisitions Matter

1. Requisitions are not automatically approved

They signal a request for stock but require review and action by the supplying facility. The supplier must open the requisition, check availability, and decide what can actually be supplied.

2. The supplier has the final say

Even if a facility requests a certain quantity, the supplying store determines the amount they can fulfil based on stock levels, priorities, or constraints. This ensures supply decisions are realistic and based on current availability.

3. No stock is moved when a requisition is created

The requisition is only the first step in the process. It prepares the groundwork for an outbound shipment, but stock remains in the warehouse until the shipment is confirmed and dispatched.

4. It keeps a clear record

The system logs what was requested, what was actually supplied, and any shortfalls. This improves accountability, enables better communication between facilities, and supports follow-up actions if needed.

Overview of Requisition Process

Once a facility sends its internal order, it appears in your system as a **requisition**. As the supplier, your job is to:

- ❖ Review the request.
- ❖ Decide how much you can (or should) supply.
- ❖ Prepare and dispatch stock (create shipment).
- ❖ Finalise the requisition when no more supply is expected.

Opening the Requisition

1. Go to **Distribution --> Requisitions**
2. You'll see a list of requisitions from other facilities.
3. Select the one you want to work on.

Name	Number	Created	Status	Shipments	Program	Ore Typ
Health Clinic	34	27/06/2025	New	0		
Health Clinic	33	05/06/2025	New	1		
Health Clinic	32	12/05/2025	Finalised	1		
District Dispensary	31	11/05/2025	Finalised	1		
Health Clinic	30	14/04/2025	Finalised	1		
Health Clinic	29	11/04/2025	Finalised	1		
Health Clinic	28	25/03/2025	Finalised	0		
Health Clinic	27	25/03/2025	Finalised	0		
Health Clinic	26	25/03/2025	Finalised	1		
Eastern Village	25	25/03/2025	New	0		
Health Clinic	24	11/02/2025	Finalised	1		
Health Clinic	23	15/01/2025	New	0		

Processing the Requisition

The list of requested items are shown in the requisition if it was sent by an mSupply store. Scroll right to see more information and vertically to see the full item list.

- Dashboard
- Reports
- Distribution**
 - Outbound Shipments
 - Requisitions**
 - Customer Returns
 - Customers
- Replenishment
- Catalogue
- Inventory
- Cold chain
- Sync
- Settings
- Help

Requisitions / 34

Add Item

Supply requested

Print

More

Customer Name: Health Clinic

Program:

Customer Reference: From internal order 44

Filter items

Details

Log

Code	Name	Unit	Our SOH	Their SOH	Suggested	Requested	Supply	Issued	Remaining
030063	Acetylsalicylic Acid 100mg tabs	Tablet	73,253	0	87.75	90	0	0	0
030453	Amoxicillin 250mg tabs	Tab	35,347	15	4.67...	10	0	0	0
201116	Bandage W.Q.W. 15cm wide x 5m roll	Roll	658	10	12.75	20	0	0	0

New

Finalised

Create Shipment

Confirm Finalised

District Warehouse

Edit

100%

English

Notice how the item lines are blue- this shows it's a placeholder line with no stock yet. Each line will turn black once the supply has been entered.

- Customer Name:** This is the facility that requested the stock — in this case, "Health Clinic".
- Customer Reference:** This tells you where the requisition came from — here, it's linked to "Internal Order 44" for that facility.
- Table Columns:** This table shows a breakdown of each item requested in the requisition:

Column	What it means
Code	The item's unique identifier.
Name	The name of the requested item.
Unit	The unit of measure used for the item (e.g., Tablet, Tab, Roll).
Our SOH	Stock on hand at our store (e.g., District Warehouse).
Their SOH	Stock on hand at the requesting facility (e.g. Health Clinic).
Suggested	The quantity the system recommended for the customer store based on their average consumption and stock levels.
Requested	The quantity requested by the customer facility.
Supply	The quantity you plan to supply. This can be edited before issuing.
Issued	The quantity already included in an outbound shipment that has been shipped.
Remaining	The difference between what was requested and what has been issued.

Quick Supply of Items

The "Supply requested" button (1) is used to quickly populate the **Supply** column (2) with the same quantities listed in the **Requested** column (3).

Requisitions / 35

Customer Name: Health Clinic Program:

Customer Reference: From internal order 45

Filter items

Code	Name	Unit	Our SOH	Their SOH	Suggested	Requested	Supply	Issued	Remaining
030063	Acetylsalicylic Acid 100mg tabs	Tablet	73,253	0	87.75	87.75	0	0	0
030453	Amoxicillin 250mg tabs	Tab	35,347	15	4.67...	4.67...	0	0	0
201116	Bandage W.O.W. 15cm wide x 5m roll	Roll	658	10	12.75	12.75	0	0	0

New > Finalised

Create Shipment Confirm Finalised

District Warehouse Edit Louisa English

This step is helpful when you plan to supply the full quantity that was originally requested, without making any changes to the order lines.

When to Use This Button

Use **“Supply requested”** when:

- ❖ You’ve reviewed the requisition from the customer.
- ❖ You agree with the quantities they’ve requested.
- ❖ You have enough stock to fully supply each item.
- ❖ You want to save time by applying the requested values all at once.

Reviewing Items Line by Line

Once you’ve opened a requisition, the next step is to review each item carefully before creating a shipment. This is where you take a closer look at what the customer has requested, compare it to your current stock, and decide how much you can actually supply.

Open mSupply gives you a dedicated screen for each item, helping you make informed, responsible supply decisions.

What Do These Fields Mean?

030063 Acetylsalicylic Acid 100mg tabs

Default pack size: 100 tablets

Requested: 0.9 packs

Their SOH: 0 packs

Our SOH: 732.53 packs

Suggested: 0.88 packs

Supply: 0 packs

Remaining: 0 packs

Issued: 0 packs

Their AMC/AMD: 0.88 packs

Their MOS: 0 months

Comment:

Our Stock

Stock on hand: 732.53 packs

Stock arriving: 0.4 packs

Stock on order: 11 packs

Requested: 0.9 packs

Other requested: 7.78 packs

Buttons: Cancel, OK, OK & Next

Field	What it means
Default Pack Size	How many individual units are in one pack.
Requested	How much the customer (e.g., health clinic) asked for
Their SOH	Their Stock On Hand (i.e., how much stock the customer currently has)
Our SOH	Your available stock in your store
Suggested	The system's recommendation, based on consumption and MOS targets of the customer
Supply	Enter the amount you will supply and select the method of supply (packs or units)
Remaining	Difference between what was requested and what you'll supply
Issued	The amount that has already been issued previously if other shipments have been created from this requisition in the past
Their AMC/AMD	Average consumption per month (for this item) in the customer store
Their MOS	Months of stock remaining for the customer based on their current SOH
Comment	Enter notes if needed (e.g., "campaign next week")

"My Store" Analysis

You can also see a stock summary in the **"My Store"** tab. This section gives you a quick snapshot of your store's current stock status for that item, helping you make informed supply decisions.

What It Shows

The bars and values are divided into two categories:

❖ Our Stock

This shows what your store currently has or is expecting:

- **Stock on hand:** How much is physically available right now in your store. → In this example: **732.53 packs**
- **Stock arriving:** Quantity expected to arrive soon from other orders or deliveries. → In this example: **0.4 packs**
- **Stock on order:** Quantity that has been ordered but not yet dispatched. → In this example: **11 packs**

Together, these give a sense of **total available or upcoming stock** for planning purposes.

❖ Requested

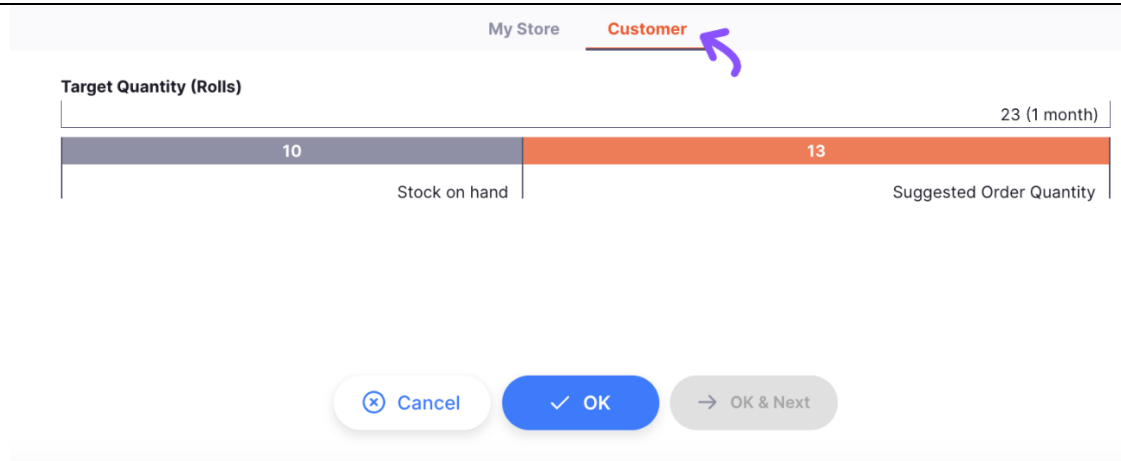
This shows what's already been asked for — both in this order and by others:

- **Requested:** How much this specific facility is requesting from you. In this example: **0.9 packs**
- **Other requested:** Total amount of this item that has been requested by other facilities. In this example: **7.78 packs**

This helps you understand the total demand across your network so you can **prioritise fairly** when stock is limited.

"Customer" Analysis

The **"Customer"** tab shows how much stock the **requesting facility** (your customer) currently has and how much more they need to reach their target stock level.



This helps guide you in deciding whether the requested amount is reasonable or needs adjusting.

How to Use This Information

In the example above:

- **Gray Bar = 10 rolls** already in stock at the customer's facility
- **Orange Bar** = Based on the customer's AMC, the system suggests supplying **13 rolls** for the customer to reach their target stock.
- **Target Line** = The customer needs **23 rolls** in total to meet their 1-month stock target.

How to Make Decisions

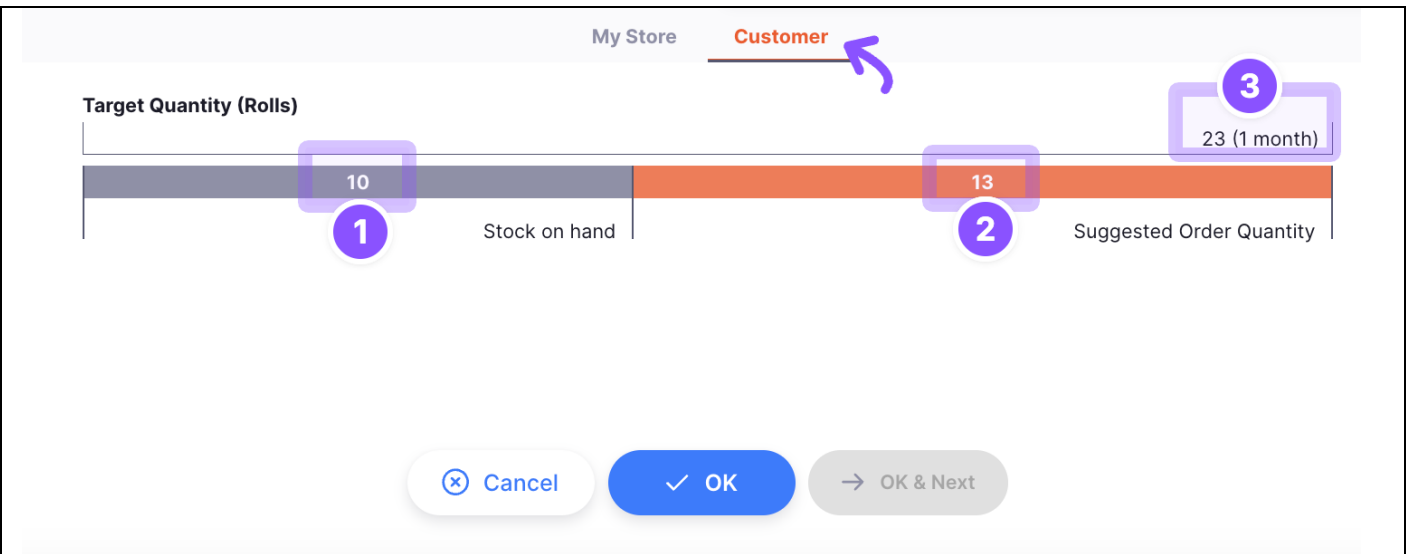
- If you have enough stock and no higher-priority requests, **supply the full 13 rolls**.
- If your stock is low or other facilities are in greater need, **supply less** (e.g., 5 or 10 rolls).

Tip: The graph in the "**Customer**" tab shows the same information as the fields indicated in the image below. This means that you can still make your decisions without needing to go to that graph.

201116 Bandage W.O.W. 15cm wide x 5m roll

Default pack size:	20 rolls	Supply:	0 rolls
Requested:	20 rolls	Remaining:	0 rolls
Their SOH:	10 rolls	Issued:	0 rolls
Our SOH:	658 rolls	Their AMC/AMD:	22.75 rolls
Suggested:	12.75 rolls	Their MOS:	0 months
		Comment:	

Comparison of the values between the table and the Customer Analysis chart (see below).



(1) shows **Their SOH**, (2) shows **Suggested**, (3) shows **Their AMC/AMD**

Supplying Stock

1. In the Supply field, enter the amount you will send.

You can:

- Match the requested amount
 - Supply less (e.g., if you have limited stock)
 - Enter 0 (if item is out of stock or not approved for supply)
2. Once you are done, select "**OK**" or "**OK & Next**" for the next item.
 - This action does not yet move stock — it records your plan.

030063 Acetylsalicylic Acid 100mg tabs

Default pack size: 100 tablets

Requested: 0.9 packs

Their SOH: 0 packs

Our SOH: 732.53 packs

Suggested: 0.88 packs

Supply: 0 packs

Remaining: 0 packs

Issued: 0 packs

Their AMC/AMD: 0.88 packs

Their MOS: 0 months

Comment:

Our Stock

Stock on hand 732.53 packs

Stock arriving 0.4 packs

Stock on order 11 packs

Requested

Requested 0.9 packs

Other requested 7.78 packs

Cancel OK OK & Next

Enter the amount you want to supply, and choose whether to supply it in packs or individual units.

Tip: Selecting "**packs**" or "**units**" in the Supply dropdown will convert all relevant fields to that. For example, if you choose "**units**," all fields (like requested, issued, remaining) will update to show unit values instead of packs — making it easier to match your workflow.

Practice Scenario 1

You are a store manager reviewing a requisition for Bandage W.O.W. 15cm wide x 5m roll. The customer has requested 20 rolls. Before approving the supply, use the information in the screen shown below and make some supply decisions.

The screenshot shows a requisition review interface for 'Bandage W.O.W. 15cm wide x 5m roll' (ID: 201116). The interface is divided into several sections:

- Default pack size:** 20 rolls
- Requested:** 20 rolls
- Their SOH:** 10 rolls
- Our SOH:** 658 rolls
- Suggested:** 12.75 rolls
- Supply:** 0 rolls
- Remaining:** 0 rolls
- Issued:** 0 rolls
- Their AMC/AMD:** 22.75 rolls
- Their MOS:** 0 months
- Comment:** (empty text box)

Below these fields, there are two tabs: 'My Store' (selected) and 'Customer'. The 'My Store' tab displays a bar chart titled 'Our Stock' with the following data:

Category	Value
Stock on hand	658 rolls
Stock arriving	1,555 rolls
Requested	20 rolls
Other requested	282.25 rolls

At the bottom of the screen, there are three buttons: 'Cancel', 'OK' (highlighted in blue), and 'OK & Next'.

Question 1

How many rolls of this item does your store currently have on hand?

- a) 20 rolls
- b) 282.25 rolls
- c) 1,555 rolls
- d) 658 rolls

Question 2

How many additional rolls are expected to arrive into your store?

- a) 1,555 rolls
- b) 20 rolls
- c) 282.25 rolls
- d) 0 rolls

Question 3

Why might you want to check the “Other requested” amount before confirming supply?

- a) To see how many other facilities have requested this item
- b) To ensure the default pack size is correct
- c) To ensure there is a fair distribution of the item
- d) To compare expiry dates

Question 4

Based on the image, do you currently have enough stock to fulfil this customer's request of 20 rolls?

- ☐ Yes
- ☐ No

Question 5

If you change the dropdown from "rolls" to "units," what happens?

- a) It disables the OK button
- b) Nothing changes
- c) The Supply field will now accept individual units instead of packs
- d) The numbers are hidden

Practice Scenario 2

You decide to supply in **packs**, rather than individual rolls. This is because your warehouse policy is **not to break open packs**, so you can only supply whole packs to customers.

You now change the supply unit to "**packs**" as shown in the image below. Use the available data to answer the following questions and decide how much you will supply.

The screenshot shows the mSupply interface for a customer named 'Customer'. The top section displays 'Default pack size: 20 rolls'. Below this, there are input fields for 'Requested: 1 pack', 'Their SOH: 0.5 packs', 'Our SOH: 32.9 packs', and 'Suggested: 0.64 packs'. To the right, there are input fields for 'Supply: 0 packs', 'Remaining: 0 packs', and 'Issued: 0 packs'. Below these, there are fields for 'Their AMC/AMD: 1.14 packs' and 'Their MOS: 0 months'. A 'Comment:' field is also present. At the bottom, there are buttons for 'Cancel', 'OK', and 'OK & Next'. The bottom section shows 'Our Stock' with a bar chart and a table of stock levels.

Category	Value
Stock on hand	32.9 packs
Stock arriving	77.75 packs
Requested	1 pack
Other requested	14.11 packs

Question 1

What is the customer's current stock on hand?

- a) 32.9 packs
- b) 1 pack
- c) 0.5 packs
- d) 14.11 packs

Question 2

Based on the system recommendation but following your store policy of only being allowed to supply whole packs, how much should you supply?

- a) 1 pack
- b) 0.64 packs
- c) 0.5 packs
- d) 20 packs

Question 3

If you supply 1 full pack, what will the customer's stock on hand be after this delivery?

- a) 1.5 packs
- b) 1 pack
- c) 1.64 packs
- d) 14.11 packs

Question 4

You have 32.9 packs on hand and 77.75 packs arriving. Can you fulfill this request?

- a) No, the stock is too low
- b) Yes, you have enough to supply 1 pack
- c) Only if you break a pack
- d) You must wait for the incoming stock

Create the Shipment

Code	Name	Unit	Our SOH	Their SOH	Suggested	Requested	Supply	Issued	Remaining
030063	Acetylsalicylic Acid 100mg tabs	Tablet	73,253	0	87.75	90	100	0	100
030453	Amoxicillin 250mg tabs	Tab	35,347	15	4.67...	10	100	0	100
201116	Bandage W.O.W. 15cm wide x 5m roll	Roll	658	10	12.75	20	20	0	20

Notice that the supply is entered and the item is now shown in black (instead of blue). To create the Outbound Shipment, select **Create Shipment**. **DO NOT Finalise the order.**

1. You can see in this screen that we've already completed the key steps:

- **Supply:** Where we have entered the amounts we've chosen to supply for each item in the requisition.
- **Issued:** Currently shows 0 because no stock has been issued yet. This will update once you begin processing the shipment. If you're creating multiple shipments from a single requisition, this field helps track how much has already been issued.
- **Remaining:** Also shows 0 for now, since nothing has been issued. Once you start issuing stock, this will display how much of the original request is still outstanding — calculated as the difference between the requested and issued amounts.

We will discuss more about **"Issued"** and **"Remaining"** in the **Partial Requisitions** section below.

2. Once you are happy, select **"Create Shipment"**. This will open the outbound shipment and begin the picking and packing process.

Warning: DO NOT SELECT "Confirm Finalised" at this stage. Doing so will close the requisition with no stock supplied and prevent you from creating any shipments now or in the future for this order.

You can now move to the next stage, which is filling in the **Outbound Shipment**. This will be discussed later on.

Partial Requisitions

In many cases, you might not be able to supply the full quantity requested, especially if stock is limited. This is where the **Issued** and **Remaining** columns become especially useful.

- When you supply only part of what was requested, the **Issued** column will reflect the quantity you've sent so far.
- The **Remaining** column will automatically update to show what's still outstanding from the original request.

This helps you:

- Track what's been fulfilled versus what still needs to be supplied.
- Plan for **multiple shipments** if you're fulfilling the requisition in stages.
- Avoid over-supplying or forgetting pending items.

Partial requisitions are common in large orders or emergency situations — and these columns ensure you stay on top of the delivery process across shipments.

What to Do in a Partial Supply Situation:

1. Supply the stock you currently have available. Enter that amount in the **Supply** column and proceed to create the shipment.
2. Later, return to the same requisition once more stock becomes available.
3. Enter the remaining supply, and create a second outbound shipment to fulfil the rest of the request.

This allows you to manage large or incomplete orders in a clear, trackable way — without needing to create a new requisition.

Finalising the Requisition

Once **all items** in the requisition have been:

- **Reviewed** – Each line has been checked and assessed for supply feasibility
- **Supplied** – Quantities have been entered into the Supply column
- **Issued** – All planned shipments have been created and dispatched

...then the requisition is ready to be **closed**.

To do this, click **Confirm Finalised**.

What does this do?

- Locks the requisition so no further changes can be made
- Prevents any new shipments from being created under this requisition
- Marks the transaction as complete in the system

Once a requisition is finalised, it becomes read-only for audit purposes. Use this step only when you're confident that **no additional supply** is required and all activity related to the order is complete.

Tip: Never finalise a requisition if there are still placeholder lines or pending supplies. Finalising too early will block further shipments and may cause confusion or missed deliveries.

Knowledge Check

Question 1

What is a requisition in the context of supply management?

- a) A request sent by the supplier for more stock.

- b) An internal order sent by a customer.
- c) The request a supplier sees after a customer sends an internal order.
- d) A document for shipping items to customers.

Question 2

What steps must be taken once a requisition is received?

- a) Review the request.
- b) Ignore the request.
- c) Check stock availability.
- d) Send a confirmation email to the customer.
- e) Decide on how much to send.

Question 3

When should the 'Supply requested' button be used?

- a) When stock levels are regular, fulfilling the entire request is possible and you are happy with how it has been submitted.
- b) When you only want to supply half of the requested amount.
- c) When you want to cancel the requisition.
- d) When reviewing the requisition is unnecessary.

Question 4

What does the column labeled 'Remaining' signify in a requisition?

- a) The total quantity you plan to supply.
- b) The amount already shipped to the customer.
- c) The difference between what was requested and what has been issued.
- d) The quantity you will soon need to reorder.

Question 5

Why is it important to not finalize a requisition prematurely?

- a) Finalizing too early can block further shipments.
- b) It allows additional requests from customers.

Question 6

What should you do if you cannot fulfill the entire quantity requested?

- a) Supply the entire amount anyway.
- b) Ignore the remaining items.
- c) Supply what is available and return later for the rest.
- d) Decline the requisition entirely.

Session 18: Outbound Shipment

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

When To Use An Outbound Shipment?

Outbound Shipments are needed when:

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

Examples of Outbound Shipments being used

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

Why It Matters

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

Outbound Shipment Stages

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

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

The screenshot shows the 'Outbound Shipments / 48' interface in Open mSupply. The left sidebar has a 'Distribution' menu item highlighted with a red box and a '1' in a blue circle. The main area shows a table of items for an outbound shipment. The table has columns: Code, Name, Batch, Expiry, Location, Unit, Pack Size, Pack Qty, Unit Qty, and Unit Sell Price. Three items are listed: Acetylsalicylic Acid 100mg tabs, Amoxicillin 250mg tabs, and Bandage W.O.W. 15cm wide x 5m roll. At the bottom, there are buttons for 'Hold', 'New', 'Allocated', 'Picked', 'Shipped', 'Delivered', and 'Verified'. A 'Confirm Allocated' button is also visible, highlighted with a red box and a '3' in a blue circle. A '2' in a blue circle is also present near the bottom navigation bar.

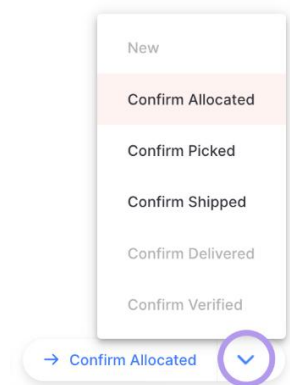
Go to **Distribution** → **Outbound Shipment** (1). Once inside an Outbound Shipment, you will be able to see the stage your shipment is on (2), and update the status as it is completed.

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

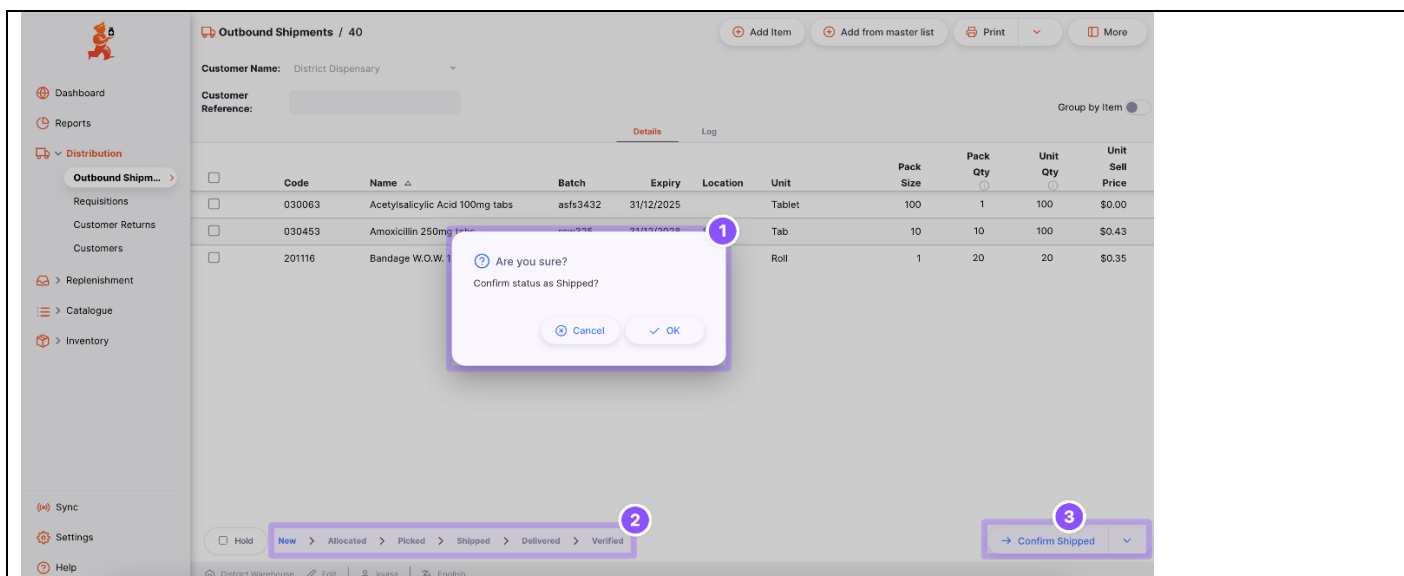
Not all shipments need to go through every stage.

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

Select the dropdown shown to skip stages more quickly.



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



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

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

The screenshot shows the 'Inbound Shipments' page. A table lists shipments with columns: Name, Status, Invoice Number, Created, Delivered, and Reference. The 'Status' column is highlighted with a purple box. The table shows various statuses like 'Picked', 'Verified', 'Delivered', and 'Shipped' for different 'District Warehouse' entries. At the bottom, it says 'Showing 1-25 of 25' and 'Rows per page: 500'.

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

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

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

1. Auto-allocate using the Issue field

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

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

2. Manual allocation using Packs Issued

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

Edit Item

Item: 030063 Acetylsalicylic Acid 100mg tabs
Available: 72553 Tablets

Issue: 0 Tablets

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

Cancel OK → OK & Next

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

3. Red expiry dates

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

4. Total Quantity

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

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

Edit Item

Item: 030063 Acetylsalicylic Acid 100mg tabs

Available: 72553 Tablets

Issue: 1 Packs of 100 Some stock lines are expired and will not be auto-allocated.

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

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

Once you have finished allocating your stock for that item line, select the **OK & Next** button to move on and repeat the same steps for the remaining items in the shipment.

Quick Allocation

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

Outbound Shipments / 48

Customer Name: Health Clinic

Customer Reference: From internal order 44

Group by Item

	Code	Name	Batch	Expiry	Location	Unit	Pack Size	Pack Qty	Unit Qty	Unit Sell Price
✓	030063	Acetylsalicylic Acid 100mg tabs				Tablet	1	100	100	\$0.00
✓	030453	Amoxicillin 250mg tabs				Tab	1	100	100	\$0.00
✓	201116	Bandage W.O.W. 15cm wide x 5m roll				Roll	1	20	20	\$0.00

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

Confirming the Allocation

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

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

The screenshot shows the 'Outbound Shipments / 48' interface. At the top, there are buttons for 'Add Item', 'Add from master list', 'Print', and 'More'. Below this, the 'Customer Name' is 'Health Clinic' and the 'Customer Reference' is 'From internal order 44'. A 'Group by Item' toggle is set to 'On'. The main table lists items with columns: Code, Name, Batch, Expiry, Location, Unit, Pack Size, Pack Qty, Unit Qty, and Unit Sell Price. Three items are listed: Acetylsalicylic Acid 100mg tabs, Amoxicillin 250mg tabs, and Bandage W.O.W. 15cm wide x 5m roll. Each item has a checkbox in the first column. At the bottom, there is a progress bar with steps: Hold, New, Allocated, Picked, Shipped, Delivered, and Verified. The 'Allocated' step is currently active. A 'Close' button and a 'Confirm Allocated' button (highlighted with a purple border) are at the bottom right.

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

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

Knowledge Check

Question 1

What does "allocating stock" mean in the outbound shipment process?

- a) Entering new stock into the system
- b) Choosing the exact batch, quantity, and pack size to send
- c) Deleting expired stock from inventory
- d) Creating a new requisition

Question 2

Which method allows you to allocate stock automatically using FEFO?

- a) Typing quantities into the Packs Issued column
- b) Using the "Allocate placeholder lines" button
- c) Creating a new requisition
- d) Editing the batch number manually

Question 3

What confirms that you've fully allocated an item line's requested quantity?

- a) The Confirm Allocated button is greyed out
- b) You have selected at least one batch
- c) The "Tablets Issued" matches the "Total quantity" shown at the bottom
- d) The expiry date is more than 3 months away

Question 4

When does the system reserve and remove allocated stock from your available inventory?

- a) Only after shipment is dispatched
- b) As soon as Confirm Allocated is clicked
- c) Immediately after allocation, even before clicking Confirm Allocated
- d) After picking is complete

Picking and Packing

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

Print a Pick Slip (Optional)

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

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

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

The screenshot shows the Open mSupply interface. At the top, there are buttons: 'Add Item', 'Add from master list', 'Print', a dropdown arrow, and 'More'. The 'Print' dropdown menu is open, showing two options: 'Outbound Shipment (landscape)' and 'Outbound Shipment (portrait)'. The 'Outbound Shipment (portrait)' option is highlighted with a purple box. Below the menu, there is a table with columns: Expiry, Location, Unit, Pack Size, Pack Qty, Unit Qty, and Unit Sell Price. The table contains three rows of data. At the bottom right, there is a button labeled 'Confirm Picked'.

Expiry	Location	Unit	Pack Size	Pack Qty	Unit Qty	Unit Sell Price
31/08/2025	SA	Tablet	100	1	100	< \$0.01
31/12/2028	SB	Tab	100	1	100	\$0.04...
31/05/2029	SB	Roll	1	20	20	\$0.35

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

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

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

Shipping the Delivery

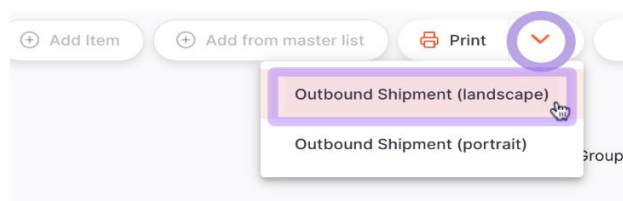
When the items physically leave your store or warehouse, select **Confirm Shipped** to mark the shipment as sent. This updates the shipment status and signals to the customer store that the stock is in transit.

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

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

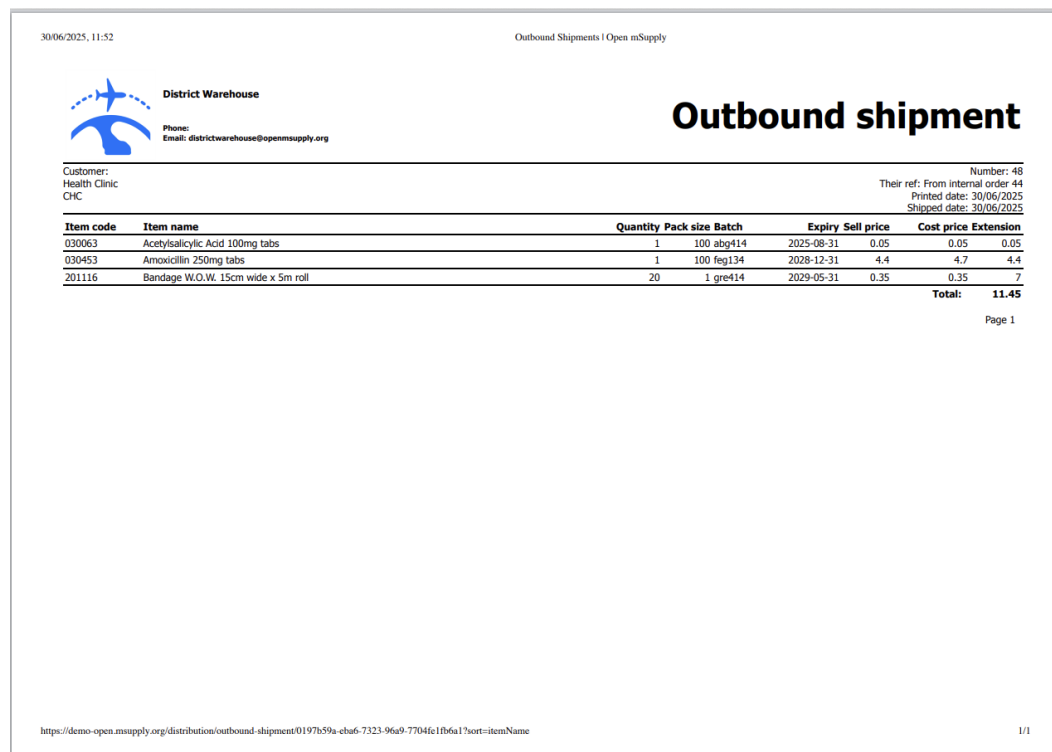
Print an Outbound Shipment Note

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



The screenshot shows the top navigation bar with buttons: '+ Add Item', '+ Add from master list', 'Print', and a dropdown arrow. The 'Print' button is highlighted with a purple circle. A dropdown menu is open, showing two options: 'Outbound Shipment (landscape)' (highlighted with a purple box) and 'Outbound Shipment (portrait)'. Below this, a table is visible with columns: 'Unit', 'Pack Size', 'Pack Qty', and 'Unit Qty'.

Unit	Pack Size	Pack Qty	Unit Qty
Tablet	100	1	100
Tab	100	1	100
Roll	1	20	20



The screenshot shows a printed document titled 'Outbound shipment' from 'District Warehouse'. It includes contact information, customer details, and a table of items. The document is dated 30/06/2025, 11:52.

District Warehouse
Phone:
Email: districtwarehouse@opensupply.org

Customer: Health Clinic
CHC

Number: 48
Their ref: From internal order 44
Printed date: 30/06/2025
Shipped date: 30/06/2025

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


Page 1

<https://demo-opensupply.org/distribution/outbound-shipment/0197b59a-elsa6-7323-96a9-7704fc1fb6a1?sort=itemName>

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

Returning Stock From an Outbound Shipment

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



 **Outbound Shipments** / 48 + Add Item +


Customer Name: Health Clinic ▼

Customer Reference: From internal order 44

Details Log


<div>1</div> <input checked="" type="checkbox"/>	Code	Name △	Batch	Expiry	Location	Unit
<input checked="" type="checkbox"/>	030063	Acetylsalicylic Acid 100mg tabs	abg414	31/08/2025	SA	Tablet
<input checked="" type="checkbox"/>	030453	Amoxicillin 250mg tabs	feg134	31/12/2028	SB	Tab
<input checked="" type="checkbox"/>	201116	Bandage W.O.W. 15cm wide x 5m roll	gre414	31/05/2029	SB	Roll

3 Selected  Delete  Allocate placeholder lines

2  Return selected lines

To return stock, select the stock lines you want returned, and then select **Return selected lines**. Then fill in the quantity to return and select your reason to bring the stock back into your inventory.

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

 ▼ Distribution

- Outbound Shipments
- Requisitions
- Customer Returns
- Customers

Shipment Is Delivered and Verified

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

What the customer does

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

What you will see

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

First to "**Delivered**".

Then to "**Verified**".

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

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

Knowledge Check**Question 1**

What is the purpose of printing a Pick Slip?

- To attach to the shipment
- To confirm the payment method
- To manually record the picked stock during collection
- To send to the supplier

Question 2

What happens when you select "Confirm Picked" in Open mSupply?

- The stock is removed from available inventory and excluded from stocktakes
- The shipment is locked for editing
- The shipment is sent
- The customer is notified

Question 3

When should you mark a shipment as "**Shipped**"?

- Before picking
- After receiving payment
- After the customer verifies the delivery
- When the shipment has physically left the store

Question 4

After marking an order as "Shipped," can you edit the item lines?

- Only if the customer hasn't received it
- No, they are locked
- Yes, but only by the customer
- Yes, anytime

Question 5

What does the "Verified" stage mean in the outbound shipment process?

- The items were delivered to the wrong location
- The warehouse staff confirm the shipment
- The customer has verified their inbound shipment
- The items are picked and packed

Session 19: Inbound Shipment

An **Inbound Shipment** in Open mSupply is the process of receiving stock into your store from another facility. When a supplier (e.g., warehouse or regional facility) sends stock using Open mSupply, an inbound shipment record is automatically created in your store. This record tells you exactly what items are on the way, how many were sent, and includes important details like batch numbers and expiry dates.

It helps your store:

- Track and prepare for deliveries from other facilities
- Confirm the quantity and condition of the received stock
- Ensure the correct stock is added to your inventory

You will review the shipment in the system, confirm that it matches what was received physically, and then complete the process by marking it as delivered and verified. This ensures all stock movements are properly recorded and traceable.

Performing an Inbound Shipment

Inbound Shipments in Open mSupply help you receive stock accurately, track what's arrived, and confirm it into your inventory. This process ensures everything is accounted for and properly recorded before stock is used or issued. Let's break down each stage.

Step 1: Shipped

The supplier has packed and shipped the goods to your facility.

Once they mark the shipment as **Shipped**, the status for the Inbound Shipment will automatically update for your store.

	Name	Status	Invoice Number
<input type="checkbox"/>	District Warehouse	Shipped	27
<input type="checkbox"/>	District Warehouse	Verified	26
<input type="checkbox"/>	District Warehouse	Delivered	25
<input type="checkbox"/>	District Warehouse	Verified	24
<input type="checkbox"/>	District Warehouse	Verified	23
<input type="checkbox"/>	District Warehouse	Shipped	22
<input type="checkbox"/>	District Warehouse	Verified	21
<input type="checkbox"/>	District Warehouse	Delivered	20

The **Shipped** status tells your store: *"Get ready — stock is on the way."* This allows you to begin the preparation for the incoming goods.

What you can do at this stage:

- Open the Inbound Shipment and view what's on the way.
- See item details: name, quantity, batch, expiry, and pack size.
- **You cannot make changes yet.** This preserves the supplier's record of what was sent.

- Dashboard
- Reports
- Distribution
- Replenishment
 - Inbound Shipments
 - Internal Orders
 - Supplier Returns
 - R&R Forms
 - Suppliers
- Catalogue
- Inventory
- Dispensary
- Cold chain
- Sync
- Settings

Inbound Shipments / 27

Add Item
Print
More

Supplier Name: District Warehouse

Reference: From invoice number: 48 (From internal order 44)

This shipment was created automatically, as the result of an Outbound Shipment in another store. You are unable to edit details until the status is confirmed as Delivered.

Group by Item

	Code	Name	Batch	Expiry	Location	Unit	Pack Size	Pack Qty	Unit Qty	Cost
<input type="checkbox"/>	030063	Acetylsalicylic Acid 100mg tabs	abg414	31/08/2025		Tablet	1	100	100	< \$0
<input type="checkbox"/>	030453	Amoxicillin 250mg tabs	feg134	31/12/2028		Tab	1	100	100	\$0.0
<input type="checkbox"/>	201116	Bandage W.O.W. 15cm wide x 5m roll	gre414	31/05/2029		Roll	1	20	20	\$0.

☐ Hold
New
Picked
Shipped
Delivered
Received
Verified

Confirm Delivered

The Inbound Shipment has the status **Shipped** so it is pending arrival at the requesting facility.

Step 2: Delivered

The physical goods have arrived at your store, and it's time to acknowledge receipt.

What you need to do:

- Open the **Inbound Shipment**.
- Click **Confirm Delivered** to confirm that the shipment physically arrived.

Details

Log

Name	Batch	Expiry	Pack Qty
Acetylsalicylic Acid 100mg tabs	abg414	31/08/2025	100
Amoxicillin 250mg tabs	feg134	31/12/2028	100
Bandage W.O.W. 15cm wide x 5m roll	gre414	31/05/2029	20

> Shipped > Delivered > Received > Verified

Confirm Delivered

Once you click **Delivered**, the system unlocks the item lines for editing, allowing you to make any necessary adjustments to the received items. If you don't mark it as delivered, you won't be able to proceed to the next stage. At this stage, the items are placed **on hold** in Open mSupply, meaning:

- The stock is **not yet available** for issuing or dispensing.
- It **does not appear** in your store's available inventory.
- It is being temporarily held in the system until you've checked and confirmed the details.

This ensures that incorrect, damaged, or unverified stock doesn't accidentally get used before it's been reviewed.

It is good to mark the shipment as "**Delivered**" as soon as the order arrives. This ensures timely record keeping and informs the supplier that the order is now with you, even if you have not yet received it into stock.

Step 3: Received

At this point, you've physically opened the boxes and checked the delivery. Now it's time to record in the system what is actually being received into your store.

Inbound Shipments / 27

Supplier Name: District Warehouse

Reference: From invoice number: 48 (From internal order 44)

This shipment was created automatically, as the result of an Outbound Shipment in another store.

Group by Item

	Code	Name	Batch	Expiry	Location	Unit	Pack Size	Pack Qty	Unit Qty	Cost
<input type="checkbox"/>	030063	Acetylsalicylic Acid 100mg tabs	abg414	31/08/2025		Tablet	1	100	100	< \$
<input type="checkbox"/>	030453	Amoxicillin 250mg tabs	feg134	31/12/2028		Tab	1	100	100	\$0.
<input type="checkbox"/>	201116	Bandage W.O.W. 15cm wide x 5m roll	gre414	31/05/2029		Roll	1	20	20	\$

Hold New Picked Shipped Delivered Received Verified

Confirm Received

What you need to do:

- Count and receive all stock that arrived
 - Even if some items are damaged or incorrect, you still **receive everything into stock first**.
 - For incorrect items, enter the item that was received using the **Add Item** button (if able).
 - Then, select the line that **did not arrive in the shipment (1)** and select **"Set quantities to 0" (2)** to zero out the stock line.

1

	Code	Name	Batch	Expiry
<input checked="" type="checkbox"/>	030063	Acetylsalicylic Acid 100mg tabs	abg414	31/08/2025
<input type="checkbox"/>	030453	Amoxicillin 250mg tabs	feg134	31/12/2028
<input type="checkbox"/>	201116	Bandage W.O.W. 15cm wide x 5m roll	gre414	31/05/2029

1 Selected Delete Return selected lines Set quantities to 0 **2**

- This ensures full traceability of what physically entered your store.

2. Edit item lines if needed

Edit Item Line

Item: 030063 Acetylsalicylic Acid 100mg tabs

Unit: Tablet

Quantities (Ctrl+1) Pricing (Ctrl+2) Location (Ctrl+3) Add batch (+)

Batch	Expiry	Pack Size	Packs Received	Tablets Received
abg414	31/08/2025	1	100	100

Cancel OK OK & Next

Select the item line to edit the details of the item being received if it is different from what was expected. Select **OK & Next** to continue to the next item.

- Update quantities, batch numbers, and expiry dates to reflect what was actually delivered.
- This helps ensure your stock records are correct before finalising.
- You can also update the price or location for where you want to store your stock at this point by switching to the appropriate tab.

Tip: You can enter either the **Packs Received** or the **Tablets Received**, depending on how your stock is counted. The system will automatically calculate the other value for you.

Step 4: Received

This is the step where you officially record the stock into your store's inventory.

- Dashboard
- Reports
- Distribution
- Replenishment
 - Inbound Shipments
 - Internal Orders
 - Supplier Returns
 - R&R Forms
 - Suppliers
- Catalogue
- Inventory
- Dispensary
- Cold chain
- Sync
- Settings
- Help

Inbound Shipments / 27

Add Item
Print
More

Supplier Name: District Warehouse

Reference: From invoice number: 48 (From internal order 44)

This shipment was created automatically, as the result of an Outbound Shipment in another store.

Group by Item

Details
Log

	Code	Name	Batch	Expiry	Location	Unit	Pack Size	Pack Qty	Unit Qty	Cost
<input type="checkbox"/>	030063	Acetylsalicylic Acid 100mg tabs	abg414	31/08/2025		Tablet	1	100	100	< \$
<input type="checkbox"/>	030453	Amoxicillin 250mg tabs	feg134	31/12/2028		Tab	1	100	100	\$0.
<input type="checkbox"/>	201116	Bandage W.O.W. 15cm wide x 5m roll	gre414	31/05/2029		Roll	1	20	20	\$

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

Confirm Received

Once you've checked the delivery and made any necessary edits (like correcting quantities or batch details), selecting **Confirm Received** means:

- The stock is now added to your **available inventory**
- It's **no longer on hold** — meaning it can be issued, transferred, or used
- The system locks in the quantities you've confirmed as received

This is the point where the stock is officially entered into your store's available stock. Until this step, it is not usable.

Step 4: Verified

This is the final quality control. After everything has been reviewed and confirmed, you can verify the shipment to lock it.

What you need to do:

- Select **Confirm Verified** when you are satisfied that the information is correct.
- No more changes can be made after this point.

Verification ensures stock records are accurate and traceable, protecting against future changes or errors. By following each step *in* order, your store maintains a **clear audit trail**, improves stock accuracy, and ensures everyone, from suppliers to staff, are aligned.

Returning Stock from An Inbound Shipment

Sometimes, after reviewing a delivery, you may find that certain items need to be returned — for example, if the stock is damaged, expired, or simply not needed.

After the stock has been received into the store, you may want it to be returned.

To return stock from an **Inbound Shipment**:

- Tick the checkbox for the items you want to return.
- Select **"Return selected lines."**

Details

	Code	Name ▲	Batch	Expiry
<input checked="" type="checkbox"/>	030063	Acetylsalicylic Acid 100mg tabs	abg414	31/08/2025
<input type="checkbox"/>	030453	Amoxicillin 250mg tabs	feg134	31/12/2028
<input type="checkbox"/>	201116	Bandage W.O.W. 15cm wide x 5m roll	gre414	31/05/2029

1 Selected
 Delete
 Return selected lines
 Set quantities to 0

This will open a window for you to enter how much stock you want returned:

Return Items

1
Select quantity

2
Reason

Code	Name	Batch	Expiry	Unit	Pack Size	Available for Return	Quantity to Return
030063	Acetylsalicylic Acid 100mg tabs	abg414	31/08/2025	Tablet	1	99	0

Cancel
Next step

How to return:

1. Check the pack size. In this example, the pack size is 1, so each pack is made of 1 tablet.
2. Type how many packs to return. In this case, if you want to return 10 tablets, type 10 in the “**Quantity to return**” field.
*If the **pack size** was **30**, typing 10 in the “Quantity to return” field would return 300 tablets.*
3. Select “**Next Step**”. You will be asked why you are returning it. Select a reason for the return. After this step, the system will automatically generate a return to the supplier.
 You can refer back to the Return note that is created by looking at your **Supplier Returns (1)**.

Supplier Return

Filters

Name	Status
District Warehouse	Delivered
District Dispensary	Picked
District Warehouse	Shipped
District Warehouse	Shipped
District Warehouse	Shipped
District Warehouse	Verified
District Warehouse	Shipped

For suppliers to receive this return, they will find the return note in the "Customer Returns" on their system.

Knowledge Check

Question 1

What is an Inbound Shipment in Open mSupply?

- a) A process for ordering new items from a supplier
- b) A record of items being received into your store from another facility
- c) A method for requesting inventory adjustments
- d) A way to dispatch items to patients

Question 2

When the shipment is marked as 'Shipped' by the supplier, what should you do?

- a) Confirm the shipment as received
- b) Edit the shipment lines
- c) Look at the item details and begin preparation to receive the goods
- d) Add new items to the shipment

Question 3

What happens when you click 'Confirm Delivered' on an Inbound Shipment?

- a) The shipment is deleted
- b) The item lines become editable so you can make corrections
- c) The items are automatically added to stock
- d) The return process is started

Question 4

Which of the following is true after stock is marked as Delivered but not yet Received?

- a) It is available in the store for issuing
- b) It is on hold and not yet usable
- c) It can be returned directly to the supplier
- d) It appears in reports as available inventory

Question 5

Why might you return items from an Inbound Shipment after receiving them?

- a) To cancel the shipment completely
- b) Because they are no longer needed, damaged, or incorrect
- c) To avoid confirming them
- d) Because they were received from the wrong user

Session 20: Returns

What Are Returns?

Returns are used when stock that was previously issued or received needs to either come back into your store (**Customer Return**), or leave your store to go back to the original supplier (**Supplier Return**).

Returns can happen for many reasons:

- Overstock or unused items
- Damaged or expired goods
- Incorrect deliveries
- Program recall or redistribution

Why Returns Matter

Handling returns correctly ensures that:

- Returned stock is tracked properly
- Inventory levels are accurate
- Damaged or expired items are not reused
- You maintain an audit trail for compliance and safety

Customer vs. Supplier Returns

Type	When to use	Stock movement
Customer Return	A facility returns stock back to you	Stock comes into your store
Supplier Return	You send stock back to a supplier	Stock goes out of your store

Manual Returns

When creating manual returns (e.g., **Customer Return** or **Supplier Return**), you'll notice that they also use status bars like outbound and inbound shipments. This helps ensure that all stock movements are accurately tracked, and it makes it easy to monitor the return through each stage, from creation to final verification.

Supplier Return / 10

Supplier Name: District Warehouse

Reference:

Group by Item

	Code	Name	Batch	Expiry	Unit	Pack Size	Pack Qty
<input type="checkbox"/>	030063	Acetylsalicylic Acid 100mg tabs	abg414	31/08/2025	Tablet	1	10

Hold New > Picked > Shipped > Delivered > Verified

Confirm Shipped

Reminder: You can update the status as you process each step of the return (e.g., *Picked*, *Shipped*, *Delivered*, *Verified*), just like with any other shipment.

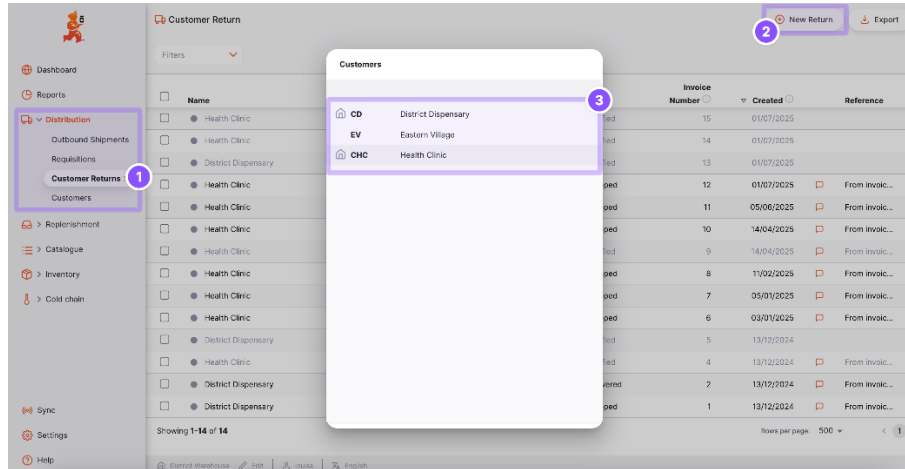
Customer Returns

A **Customer Return** happens when a facility that received stock from your store (a customer) sends the items back to you.

This usually happens when:

- The customer was sent too much
- Items are damaged, near expiry, or not needed
- A program ends and stock must be returned centrally

Processing a Customer Return



Distribution → **Customer Returns** → **New Return** → Select the **Customer** (this is the facility that is returning the goods to you)

Once you have opened the Customer Return, select **Add Item** to open the **Return Items** window.

1. Add in the item details (batch and expiry) for the returned item. Use the "Add Batch" button if there are multiple batches of the same item to return.
2. Review the Pack Size

- The **Pack Size** is based on the default pack size in the system — for example, in the image above, each pack contains **100 tablets**. This can be changed if needed.
 - Always check the pack size is correct when making returns.
 - Return based on pack size, not just counting units.
3. Enter the Quantity Returned
 - In the **Quantity Returned** field, type the number of packs the customer is returning. For the example shown in the image above (pack size = 100):
 - If you type **1** in **Quantity Returned**, they're returning 1 pack (100 tablets).
 - If you type **2** in **Quantity Returned**, they're returning 2 packs (200 tablets total).
 4. Select "Next Step"
 - After entering quantity, select **Next Step** to select a reason for the return (e.g., damaged, incorrect batch, short expiry) and then OK.
 5. Review the stock and update the status to **"Delivered"** if you have received the return.
 - The returned stock now shows up in your inventory.
 - You may need to place the returned stock into quarantine if it's near expiry, damaged, or uncertain.
 - Once you are finished reviewing and do not want any further changes made, update the status to **"Verified"** to finalise the return note.

Customer Return / 20

Customer Name: District Dispensary

Customer Reference:

This return was created manually. The delivery status will not be automatically updated.

Group by Item

Code	Name	Batch	Expiry	Unit	Pack Size	Pack Qty	Unit Qty
030063	Acetylsalicylic Acid 100mg tabs			Tablet	1	10,000	10,000

Status history

- New 02/07/2025
- Delivered
- Verified

Hold New

Confirm Delivered

Best Practices for Customer Returns

- Always confirm the batch and expiry date on return
- Inspect the condition of returned goods before reusing
- Use clear reasons to support audit logs
- Use **locations** (e.g., a quarantine area) when needed to put the items into a holding area.

Supplier Returns

A **Supplier Return** is used when you need to send stock back to your supplier.

This happens when:

- You received damaged, incorrect, or expired goods
- There is an item recall from the supplier
- There was a duplicate shipment or excess supply

Processing a Supplier Return

Supplier Return

Filters

2 New Return Export

<input type="checkbox"/>	Name	Status	Invoice Number	Created
<input type="checkbox"/>	Health Clinic	Shipped	2	24/06/2025
<input type="checkbox"/>	Health Clinic	New	1	12/02/2025

Showing 1-2 of 2 Rows per page: 500 < 1 >

Replenishment → **Supplier Returns** → **New Return** → Select the **Supplier** (this is the store or company you are returning the stock to)

Once you have opened the Supplier return, select **Add Item** to open the **Return Items** window.

Return Items

Item: 031661 Captopril scored 25mg tabs

1 Select quantity 2 Reason

Code	Name	Batch	Expiry	Unit	Pack Size	Available for Return	Quantity to Return
031661	Captopril scored 25mg tabs	tre545	31/12/2029	Tablet	100	10	0
031661	Captopril scored 25mg tabs	ger352	31/01/2028	Tablet	1	700	0

Cancel Next step OK & Next

1. Look for the stock line with the matching batch, expiry and **pack size** that you want returned.
2. Enter Quantity to Return
 - In the **Quantity to Return** field, enter how many packs you're returning for the selected batch.
 - You can only return up to the amount shown in "**Available for Return.**"
 - The system will automatically calculate based on the pack size, so double-check the pack size column to ensure you're returning what you intend.
3. Select "Next Step"
 - After entering the quantity, select **Next Step** to select a reason for the return (e.g., damaged, incorrect batch, short expiry) and confirm the return.
4. Review Stock Adjustment and update the status to "**Picked**".
 - When items are in your Supplier Returns but the status is "**New**", the items are removed from your "Available SOH".

- Once the status has been set to **"Picked"**, stock is removed from your inventory (or your Total SOH).
- Once you are finished reviewing and do not want any further changes made, update the status to **"Verified"** to finalise the return note.

Best Practices for Supplier Returns

- Use correct batch and expiry info to avoid errors
- Communicate with supplier to align expectations
- Track returns for reporting and reconciliation

Inbound and Outbound Shipment Returns

When returns are made directly from **Inbound** or **Outbound Shipments**, Open mSupply automatically creates a **return reference note** linked to that shipment.

This ensures:

- There's a clear history of what was returned and why
- The return is traceable back to the original shipment (either sent or received)
- You can review and audit return activity at any time

These return reference notes appear in the **Returns** section of the system, helping users maintain full visibility over adjustments made after shipping or receiving.

Return type	Where to view the Return Record
Inbound Shipment Return	Supplier Returns
Outbound Shipment Return	Customer Returns

To see more about how to create Inbound or Outbound returns, see the Returns chapter in the previous lessons: **"Inbound Shipment"** or **"Outbound Shipment"**.

Receiving Customer Return

When a mSupply store sends stock back to your store, it will appear in your system if the return was automatically created (e.g., the customer made an Inbound Shipment Return or a Supplier Return to you).

The screenshot shows the 'Customer Return' interface in Open mSupply. The sidebar on the left contains navigation links: Dashboard, Reports, Distribution (with sub-links for Outbound Shipments, Requisitions, Customer Returns, and Customers), Replenishment, Catalogue, Inventory, Cold chain, Sync, and Settings. The main content area is titled 'Customer Return / 21' and shows details for a return from 'Health Clinic' with reference 'From invoice number: 17'. A message states: 'This return was created automatically, as the result of an Supplier Return in another store.' Below this is a table with columns: Code, Name, Batch, Expiry, Unit, Pack Size, Pack Qty, and Unit Qty. The table contains one row: '030063', 'Acetylsalicylic Acid 100mg tabs', '532abg...', '31/08/2025', 'Tablet', '1', '5', and '5'. A red circle with the number 2 is next to the 'Tablet' unit. At the bottom, a status bar shows the process flow: Hold, New, Picked, Shipped, Received, Verified. A 'Confirm Received' button is highlighted with a red circle and the number 1.

To receive an automatically generated return from a customer that is also using mSupply, go to **Customer Returns** to find the return, then proceed with the steps described below.

To process the Customer Return:

1. Select **Confirm Received**

- Once the physical stock arrives at your store, select **Confirm Received**. This step updates the return status and allows you to make edits to the item lines. Until this is done, the line details will remain locked and uneditable.

Note: Selecting **Confirm Received** also brings the items directly into your available stock on hand. If the return was due to quality concerns, make sure to verify the return immediately and either remove the item or move it to a **Hold** location to prevent it from being used.

2. Edit and Verify

- Review the returned item details — such as batch number, expiry date, and quantity. If everything is correct, select **Confirm Verified** to complete the return.

This process ensures the returned stock is officially received into your inventory and is accurately reflected in your stock records. It also maintains a clear audit trail across both stores involved in the return.

Knowledge Check

Question 1

What is the purpose of creating a return in Open mSupply?

- a) To bring stock back into or send stock out of your store
- b) To place a temporary hold on items
- c) To delete incorrect orders
- d) To adjust pricing

Question 2

Which type of return should you use if a facility is sending stock back to your store?

- a) Stock Adjustment
- b) Supplier Return
- c) Customer Return
- d) Transfer

Question 3

In a Customer Return, which direction is the stock moving?

- a) Into the supplier's warehouse
- b) Into your store
- c) Out of your store
- d) Nowhere – it stays in place

Question 4

If you receive damaged goods and want to send them back to the supplier, which return type should you create?

- a) Customer Return
- b) Supplier Return
- c) Inbound Shipment
- d) Stock Adjustment

Question 5

Where do you find the return record for an Outbound Shipment return?

- a) Customer Returns
- b) Inventory Adjustments
- c) Supplier Returns
- d) Reports

Final Scenario

Practice: Running the Store After a Stock Disruption

Well done! 🎉 You've now worked through every part of store management using Open mSupply — from ordering stock, allocating and dispatching shipments, to receiving deliveries and processing returns.

In this final scenario, it's time to put everything into practice.

You'll take on the role of an inventory manager recovering from a system disruption, and your goal is to clean up your data, prepare for an upcoming campaign, and stay audit-ready. Each step will challenge your understanding of what to do and how to do it using the system tools.

You are the inventory manager at a district health centre. After several weeks of disrupted internet and power, your facility is finally back online. A large outreach campaign is scheduled to start in 10 days, and a supervisor is visiting tomorrow to check your store is ready.

Identify and fix issues in your store, then make sure you have enough stock for the campaign. If you are working in groups, this is a good time for having a discussion with the cases.

If you have access to a demo version of **Open mSupply**, have a practise to see if you can perform some of these steps. Anywhere you spot a green tick is something you can try to practise too!

Step 1: Stock Check & Discrepancy

Your store is back online after several weeks of disrupted internet and power. With an outreach campaign starting in 10 days, you begin a stocktake and discover the following:

- 2 vials of expired tetanus vaccine still recorded as valid in the system
- 1,000 oral rehydration salts (ORS) are on the shelf but not showing in Open mSupply
- 10 packs of paracetamol show in the system, but only 4 are physically in stock

Question 1

What do you do with the expired vials?

Question 2

How do you handle the missing ORS stock?

Question 3

What correction is needed for the paracetamol?

Try this in the demo:

1. Perform a stocktake with 3 random items using the stocktake function.
2. Perform a stock adjustment with a location change and add a reason.
3. Decrease quantity using Inventory adjustment and add a reason.

Step 2: Requesting Stock

You notice that zinc, gloves, and amoxicillin are running low. You'll need them for the outreach.

Question 1

How would you go about requesting these items in Open mSupply?

Question 2

Would you use the suggested quantity or calculate your own?

Question 3

What kind of information might help you decide how much to request?

Try this in the demo:

1. Try creating an internal order and adding items to this order.
2. Review the graphs for each of the items.
3. Look at the suggested quantities for the item and adjust your order based on a large upcoming campaign.

Step 3: Receiving a Delivery

The warehouse sends part of your order. But:

- 20 boxes of gloves are damaged
- Amoxicillin batch and expiry differs from what was expected

Question 1

What do you do when receiving the shipment?

Question 2

How do you process the damaged gloves?

Question 3 out of 3

How do you update the expiry for the amoxicillin?

Try this in the Demo:

1. Open an inbound shipment and add some items, then adjust batch and expiry dates.
2. Now, explore updating your inbound shipment statuses and changing item line information.
3. Try entering a return on the Inbound Shipment screen after you have verified a completed inbound shipment.
4. You can also try creating and sending an Outbound shipment so that you can see how stock is sent to other facilities.

Bonus Demo activity: If you have access to a warehouse and clinic on Open mSupply, you can try the full process of creating an order from the **Clinic** and sending it to the warehouse (*Internal Order*) --> Reviewing the order at the **Warehouse** (*Requisition*) and creating a shipment (*Outbound shipment*) --> And then receiving that order at the **Clinic** (*Inbound shipment*).

Step 4: Return from Outreach

Another facility sends back:

- 4 packs of paracetamol (good condition)
- 1 leaking bottle of iodine

Question 1

How do you process these returns?

Question 2 out of 3

Where do you store the leaking iodine?

Question 3 out of 3

What kind of reasons would an Outreach Clinic have for returning something?

Try this in the demo:

1. Create a new customer return and add returned stock.
2. Check your inventory for an item. Create a return for that item and see if you can see the stock change in your inventory.

Final Reflection

Take a moment to think about what you've done in this scenario. Reflect on the following questions and jot down your thoughts:

What risks could occur if you skipped any of these steps?

- Stock levels would be inaccurate
- Expired or damaged items might be reused
- You could run out of key items during the campaign
- Errors may go unnoticed, affecting patient safety and program delivery

How would syncing impact this whole process?

- Without regular syncing, your store and the central system won't be aligned
- Delays in syncing could lead to double orders or missed deliveries
- Accurate syncing ensures all adjustments, receipts, and returns are recorded and visible across facilities

What parts of the system helped you most in staying organised?

- Internal orders help plan stock ahead of campaigns
- Stocktake adjustments and return processes keep inventory clean and traceable
- Graphs and suggested quantities make decisions faster and data-driven
- Quarantine locations help manage unusable or risky items
- Clear shipment statuses guide what to do next and who's responsible

Summary

Through this practical scenario, you've put into action key skills in Open mSupply:

- Identifying and correcting stock discrepancies
- Creating and reviewing internal orders
- Receiving and editing inbound deliveries
- Processing customer returns with proper traceability

These actions are essential for running a reliable and responsive store. By applying what you've learned, you help ensure accurate inventory, smooth ordering, and safe stock handling — all of which are critical to supporting patient care and program delivery.